Profile 2025

April 1, 2024 – March 31, 2025

An economic report on the screen-based media production industry in Canada.

CMPA
Canadian Media Producers Association

CANADA MEDIA FUND

Canada

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Table of Contents

Introduction

Welcome to *Profile 2025*

Profile 2025 provides a detailed overview of production activity in Canada, with information compiled from federal and provincial agencies, as well as funding organizations such as the Canada Media Fund and Telefilm Canada. The financial information aligns with the fiscal year of these agencies and organizations; as such, *Profile 2025* contains information from the start of April 2024 to the end of March 2025.

Total production volume in the Canadian film and television industry increased by 4.6 per cent to $10.17 billion in 2024/25. This growth was driven by a 9.5 per cent increase in foreign location and services (FLS) production, reaching $5.3 billion. Broadcaster in-house production also rose by 5.4 per cent, principally as a result of additional spending by CBC/Radio-Canada related to its coverage of the 2024 Summer Olympics in Paris.

In many ways, the increases in production activity represent a rebound, in part, from the significant decreases experienced in 2023/24. In that year, production volume was negatively impacted by the two lengthy labour strikes in the United States and Canadian broadcasters having caught up on their programming underspend during the COVID pandemic. However, this rebound has not returned volumes back to post-pandemic highs, as content commissioning significantly increased in that two-year period but has since come down. Examined over a longer ten-year timeline, production activity in 2024/25 resumes a growth trend seen prior to the disruptive pandemic period, especially in relation to FLS production.

In its 2025/26 budget, the federal government announced additional measures to support Canadian creators and the cultural economy, as well as protect the CBC as Canada's national broadcaster. Stabilized funding for Telefilm Canada, and more funding for both the Canada Media Fund and the CBC will encourage more Canadian content production. But more is needed, principally because the issues at play are systemic in nature.

At the same time as growth resumes in the FLS space, data shows Canadian broadcaster revenues continuing to decline, along with their expenditures on Canadian programming. Project green lights are becoming increasingly difficult to secure, raising concerns about the commissioning of content in the years ahead.

Data from the CRTC shows that Canadian broadcaster revenues are in decline, as are their expenditures on Canadian programming. While online service revenues already total more than five billion dollars annually, they are not required to contribute to the development and production of Canadian content from their Canadian subscribers. For Canadian producers, the impact is clear and felt from multiple industry access points.

The *Online Streaming Act* introduced amendments to the *Broadcasting Act*. Principle among them is the inclusion of online services as part of the Canadian broadcasting system, including a specific requirement for those services to also contribute to the development, production and discoverability of Canadian programming.

The implementation of a modernized regulatory framework by the Canadian Radio-television Communications Commission (CRTC) has been delayed. While an initial decision in June 2024 established a base contribution requirement, it was appealed and a decision from the Federal Court of Appeal is still pending. Subsequently, in November 2025, the CRTC did provide a revised definition for the certification of Canadian content. However, a counterpart decision regarding the revenue-based contributions themselves was not issued at the same time, and at the time of publishing *Profile 2025*, we continue to await that decision. A third phase, reviewing the specific contribution proposals provided by broadcasters and online services, is not expected to start until later in 2026.

Notwithstanding these challenges, a revised regulatory framework holds the key to a better and more sustainable Canadian broadcasting system. It will provide the existential bridge from traditional broadcasting to multi-platform distribution and ensure the continued participation and representation of Canadians and Canadian stories in that system.

There are also a number of firsts for this year's report.

Indigenous production

Chapter 2 on Canadian content now also includes summary data for Indigenous audiovisual production. The estimate for 2024/25 indicates the highest level of total production volume ($347 million), since that data was first tracked in 2019/20.

The New Digital Format

This year's edition of *Profile* introduces a new digital site from which readers can access the data contained in the report. This digital format is designed to provide a more user-friendly experience, enabling more effective and efficient exploration of information related to the production industry.

In the years ahead, we intend to continue building on the digital foundation established with this edition of *Profile*.

Contributors

The Canadian Media Producers Association (CMPA), the Department of Canadian Heritage, the Canada Media Fund (CMF), Telefilm Canada, the Indigenous Screen Office, the Association québécoise de la production médiatique (AQPM) and Nordicity have collaborated to prepare *Profile 2025*. *Profile 2025* is the 29th edition of the annual economic report prepared by the CMPA and its various project partners over the years.

Profile 2025 provides an analysis of economic activity in Canada's screen-based media production industry during the period of April 1, 2024 to March 31, 2025. It also provides comprehensive reviews of the historical trends in production activity between the fiscal years of 2015/16 and 2024/25.

CMPA
Canadian Media Producers Association

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

Indira Balkissoon, Coordinator, Business Affairs & Policy
Gamiela Fereg, Senior Manager, Media Relations and Communications
Tracy Holloway, Business Analyst & Special Projects
Alain Strati, Senior Vice-President, Industry, Policy and General Counsel

Canada

25 Eddy Street Gatineau, QC K1A 0M5
Tel: 1-866-811-0055 / 819-997-0055
TTY/TDD: 819-997-3123
PCH.info-info.PCH@canada.ca

Peter Mann, Senior Policy Analyst, CAVCO
Mohamad Ibrahim Ahmad, Statistics and Data Analytics Supervisor, CAVCO
Samra Panlaqui, Statistics and Data Analytics Officer, CAVCO
Ishti Hossein, Junior Data Analyst, CAVCO
Jerry Li, Junior Data Analyst, CAVCO

CANADA MEDIA FUND

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

Claire Nadia Caneus, Senior Data Analyst, Equity & Program Reporting
Juhi Chakraverty, Research Analyst, Audience Research
Linda Di Federico, Analyst, Data Management
Michael Mastantuono, Director, Strategy & Business Intelligence
Kyle O'Byrne, Director, Public Affairs

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

TELEFILM CANADA

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

Liliana Espinosa, Analyst, Policy and Business Intelligence
Feriel Grine, Analyst, Policy and Business Intelligence
Mathieu Perreault, Director, Strategic Development and Business Intelligence

Telefilm Canada contributed to the funding of this report. Its content represents the opinions of the authors and does not necessarily represent the policies or the views of Telefilm Canada or of the Government of Canada.

AQPM

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

Hélène Mesier, Président and CEO
Annie Provencher, Regulatory Affairs and Business Intelligence Manager
Anne-Valérie Tremblay, Manager, Financing and Member Services

Nordicity

Dustin Chodorowicz, Partner
Kristian Roberts, CEO & Managing Partner
Peter Lyman, Senior Partner
Nicole Matiation, Sector Lead AV Production
Jocelyn Pogorbsky, Manager
Louis Underwood, Senior Analyst
Ryan Lee, Senior Analyst
Nikitha Gopal, Senior Consultant

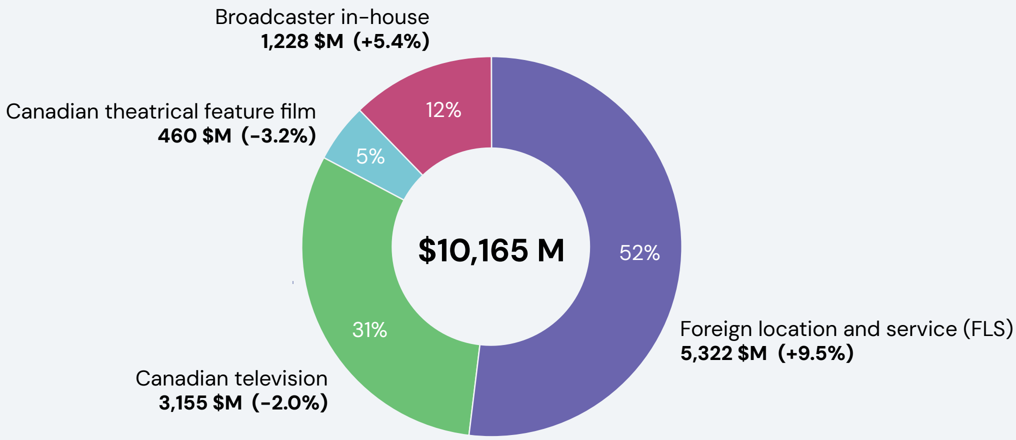
Nordicity is a leading international consulting firm providing private and public-sector clients with solutions for economic analysis, strategy and business, and policy and regulation across four priority sectors: arts, culture and heritage; digital and creative media; information and communication technologies (ICTs); and innovation.

INDIGENOUS SCREEN OFFICE
BUREAU DE L'ÉCRAN AUTOCHTONE

PO Box 587, Ohsweken, ON, N0A 1M0
Tel: 705-933-4538
info@iso-bea.ca
https://iso-bea.ca/

2024/25 At a Glance

Total film and television production volume* in Canada, 2024/25



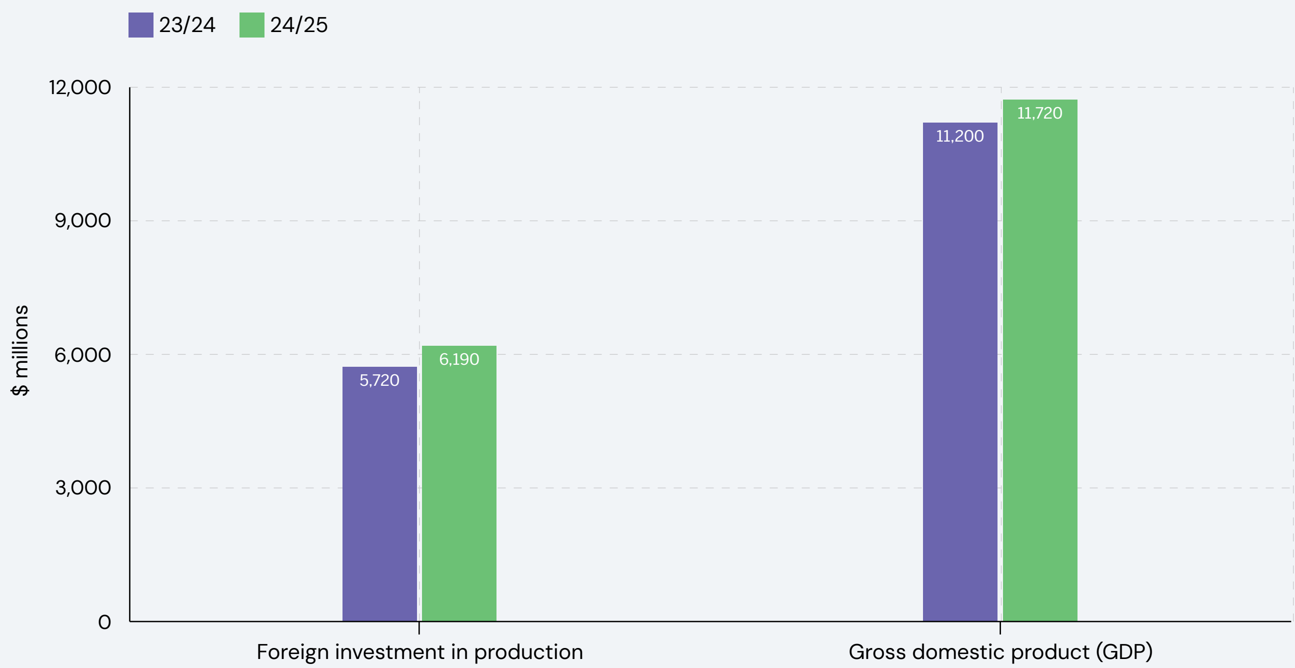
Source:
Canadian television and theatrical feature film production: Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO) and the Canadian Radio-television and Telecommunications Commission (CRTC). Broadcaster in-house (Canadian): Estimates based on data from CRTC and CBC/Radio-Canada. Foreign location and service (FLS) production: Association of Provincial Television and Film Agencies (APTFA).
Note:
Totals may not sum due to rounding.
*Throughout this report, "volume" or "total volume" refers to the sum of production budget

Canadian jobs provided, 2024/25

	SHARE (%) 2024/25	JOBS 2024/25	GROWTH (%) 2024/25
Foreign location and service (FLS) production	54	97,920	4.6
Canadian television	32	58,000	-6.6
Canadian theatrical feature film	5	8,420	-8.4
Broadcaster in-house	9	17,020	0
Total	**100**	**181,360**	**-0.3**

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

Canadian economic impact, 2023/24 vs. 2024/25



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

1 Overview of the screen sector in Canada

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

1. **Canadian television** production includes television programs made largely by independent production companies, but also television programs made by production companies affiliated with Canadian broadcasters. All of these television programs are certified as Canadian content by the Canadian Audio-Visual Certification Office (CAVCO) of the Department of Canadian Heritage, or the Canadian Radio-television and Telecommunications Commission (CRTC).[1]
2. **Canadian theatrical feature film production** includes feature-length films made by independent production companies that are certified as Canadian content by CAVCO.
3. **Foreign location and service (FLS) production** largely consists of feature films and television programs filmed in Canada by foreign producers or by Canadian service providers.[2] For the vast majority of FLS projects, the copyright is held by non-Canadian producers.
4. **Broadcaster in-house production** includes television programs made by Canadian television broadcasters in their own facilities as opposed to being made by an external production company that is either independent or affiliated with the broadcaster. Broadcaster in-house production primarily comprises news, sports and current affairs programs.

Canada's film and television production industry is very much integrated into the global entertainment and media sector. The annual volume of production in segments 1 to 3 (listed above) is affected by the annual levels of foreign investment in the Canadian film and television production industry. The majority of this **foreign investment in production (FIIP)**[3] flows into the FLS production segment; however, both the Canadian television and Canadian theatrical feature film production segments also attract FIIP, given the export of Canadian content for distribution outside of Canada.

Highlights 2024/25

- Total volume[4] of production in Canada increased by 4.6% to $10.17 billion, although it was still 15.8% below the peak of $12.07 billion reached in 2022/23.
- Total volume grew both in real 2015 dollars and current dollars. On an inflation-adjusted real dollar basis, total volume increased by 5.3% in 2024/25 (measured in 2015 dollars).
- Canadian content production decreased by 2.2% to $3.62 billion.
- Canadian television production decreased by 2.0% to $3.16 billion.
- Canadian television production was 16.7% below the peak volume of $3.79 billion reached in 2022/23.
- Canadian theatrical feature film production decreased by 3.2% to $460 million.
- Broadcaster in-house production increased by 5.4% to $1.23 billion, impacted significantly by the production activity involved with the coverage of the 2024 Summer Olympics in Paris.
- FLS production increased by 9.5% to $5.32 billion.
- The value of foreign investment in production (FIIP) in Canada increased by 8.3% to $6.19 billion.
- The total gross domestic product (GDP) impact of production in Canada increased by 4.6% to $11.72 billion.
- Production generated employment for 181,360 Canadians (including direct and spin-off impacts), a decrease of 0.3%.
- The entire screen sector value chain (including film and television production, distribution, exhibition, television broadcasting and broadcasting distribution) generated an estimated 264,420 jobs (5.1% decrease), $15.00 billion in labour income (2.3% increase) and $19.91 billion in GDP (1.3% decrease) for the Canadian economy (both direct and spin-off impacts).[5]

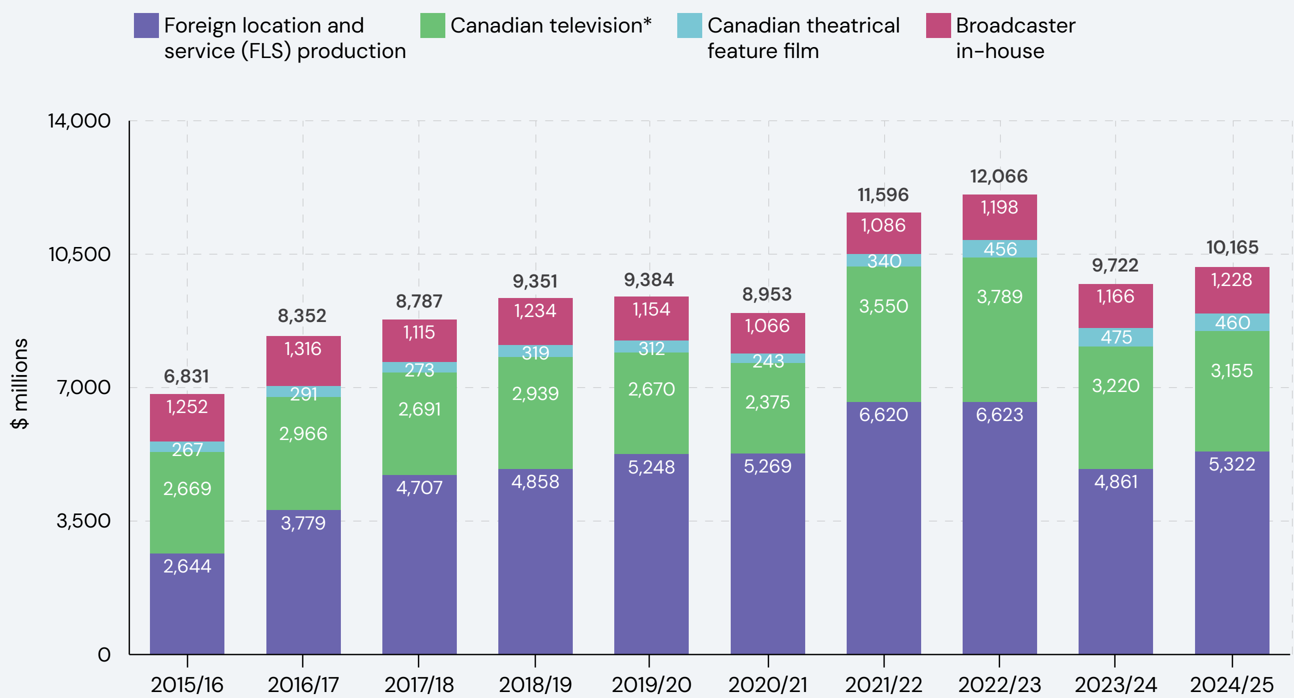
[1] See Box 1.
[2] Canadian service providers are Canadian producers who provide production and/or post-production services in Canada on behalf of non-Canadian producers.
[3] Foreign investment in production (FIIP) includes the value of foreign broadcasters' and distributors' pre-sale financing, as well as the value of Canadian distributors' financing of Canadian television and theatrical feature film production, which is largely linked to Canadian distributors' ability to license that content outside of Canada.
[4] "Volume" or "total volume" refers to the sum of production budgets.
[5] Direct economic impacts refer to the employment and gross domestic product (GDP) generated directly within Canada's film and television value chain. Spin-off economic impacts refer to the employment and GDP generated within other industries in the Canadian economy on account of the increased economic activity in the film and television value chain. See Methodology and Glossary for more information.

1.1 Film and television production in Canada

Overview of the screen sector in Canada

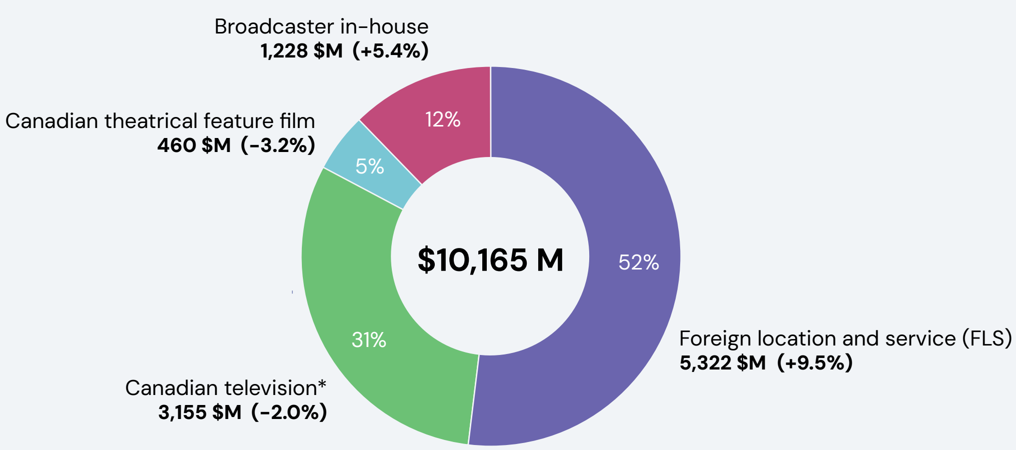
The total volume of film and television production in Canada increased by $443 million in 2024/25.

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



Source:
Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO), the Canadian Radio-television and Telecommunications Commission (CRTC), and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.
*Canadian television includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
*Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

Total volume of film and television production in Canada, by segment, 2024/25



Source:
Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO), the Canadian Radio-television and Telecommunications Commission (CRTC), CBC/Radio-Canada and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.
*Canadian television includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
*Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

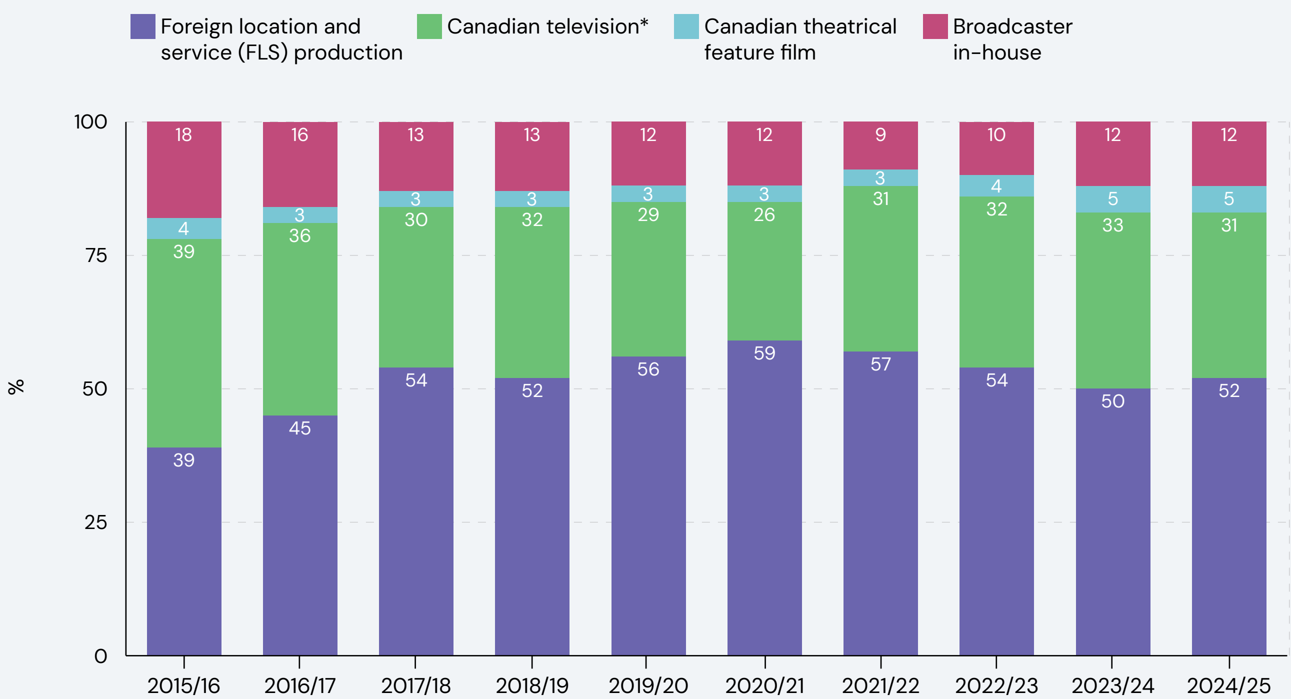
Total volume of film and television production in Canada, annual growth by segment, 2024/25 ($ millions)

$ MILLIONS	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Foreign location and service (FLS)	4,861	461	9.5
Canadian television*	3,220	-65	-2
Canadian theatrical feature film	475	-15	-3.2
Broadcaster in-house	1,166	63	5.4
Total	**9,722**	**443**	**4.6**

Source:
Estimates based on data collected from the Canadian Audio-Visual Certification Office (CAVCO), the Canadian Radio-television and Telecommunications Commission (CRTC), CBC/Radio-Canada and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.
*Canadian television includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
*Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

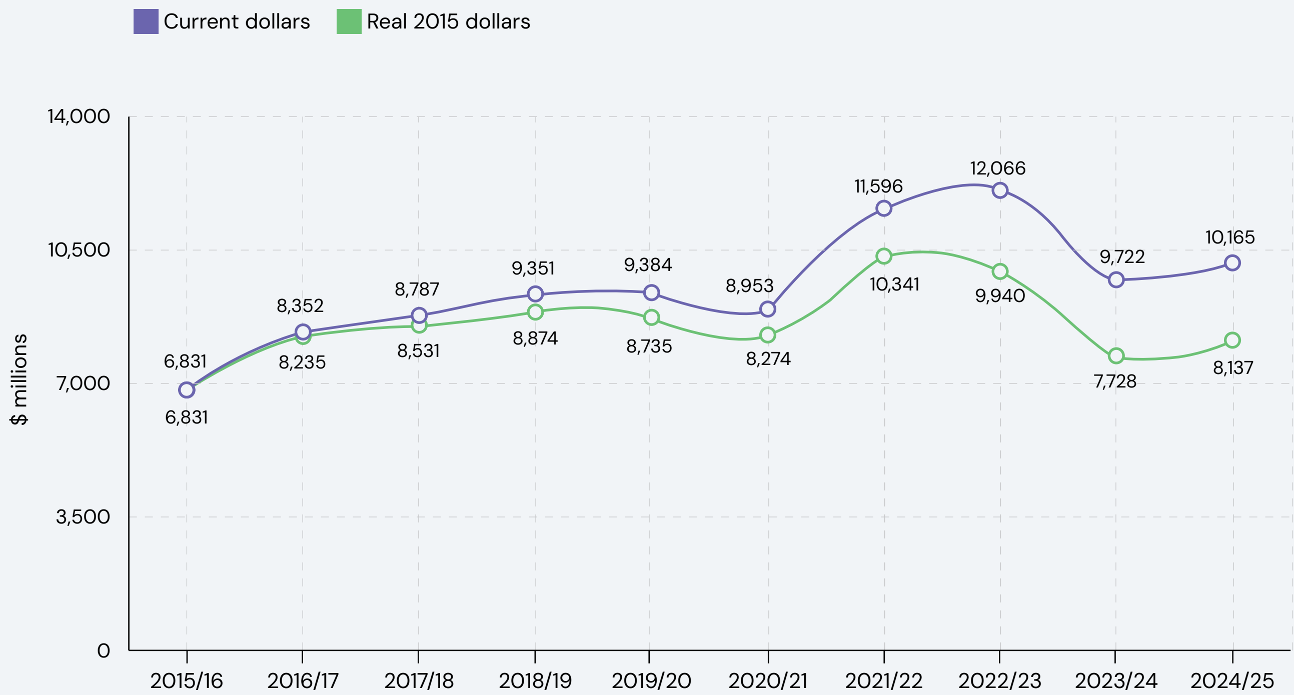
FLS production continues to make up 50% or more of the total volume of film and television production in Canada. Its share of production rose slightly by 2% to 52%, remaining lower than it was a few years ago in the COVID period, where it peaked at 59% in 2020/21. Having rebounded since that period, Canadian television's share did drop by 2% to 32%, albeit remaining in a consistent range over the last 3 to 4 years.

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



Source:
Estimates based on data collected from CAVCO, CRTC, and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.
*Canadian television includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
*Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

Exhibit 1-2 Total volume of film and television production in Canada (nominal vs. inflation-adjusted real 2015 dollars)



Source:
Estimates based on data collected from CAVCO, CRTC, the Association of Provincial Television and Film Agencies, and Statistics Canada.

Box 1: Volume and number of Canadian online-first audiovisual content

Prior to 2017, Canadian producers received the Canadian Film or Video Production Tax Credit (CPTC) only for audiovisual content that was certified by CAVCO, and ultimately shown in Canada by a licensed broadcaster, in a movie theatre, or by release on Blu-ray or DVD, although that content could also be shown online. However, with the proliferation of online and on-demand services in recent years, many Canadian producers have been increasingly premiering their films and television programs on online platforms, as well as producing content primarily intended for online consumption.

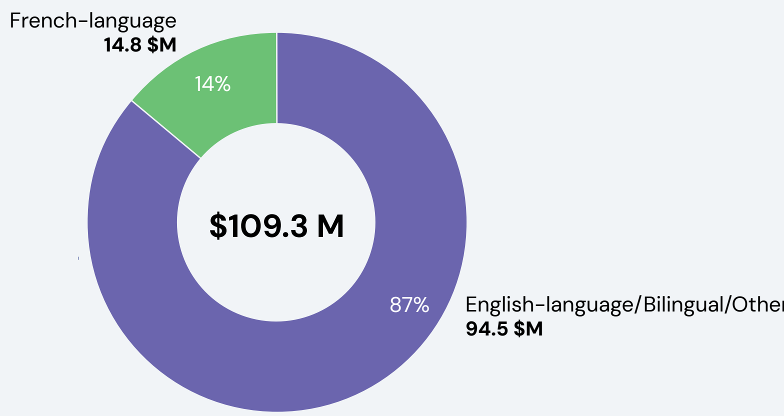
This type of audiovisual production may be referred to as "online-first" production. "Online-only" production is a subset of online-first production and includes audiovisual content that, during its first two years after completion, is released in Canada only on one of the many online platforms on CAVCO's list of acceptable online services pursuant to CAVCO Public Notice 2017-01.

Box 1 Online first production

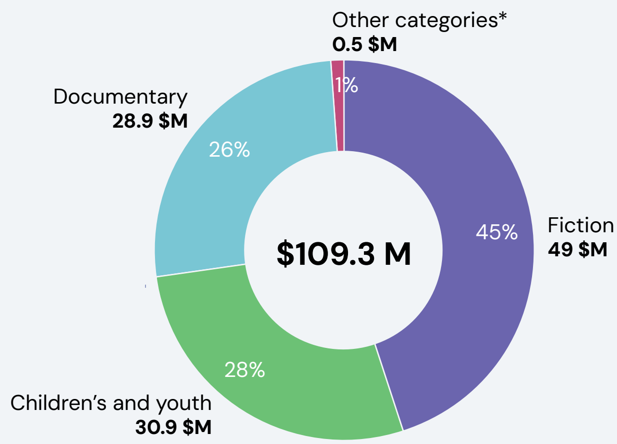
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Volume ($M)	69	181	119	202	98	107	119	109
Number of projects	100	136	99	120	128	106	98	74
Average budget ($M)	0.69	1.33	1.2	1.68	0.77	1.01	1.21	1.48

Source:
Estimates based on data collected from CAVCO.
Note:
Statistics for online-first production do not incorporate CAVCO application-lag adjustment.

Box 1: Volume of Canadian online-first audiovisual content, by language, 2024/25 ($ millions)



Volume of Canadian online-first audiovisual content, by category, 2024/25 ($ millions)



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding.
*Includes lifestyle and human interest, and variety and performing arts categories. Projects in these other categories have been combined to avoid disclosure of amounts for individual projects.

1.2 Region

Overview of the screen sector in Canada

Total volume of film and television production increased in Ontario (up $600 million, or 18.5%), British Columbia (up $160 million, or 6.3% and Atlantic Canada (up $25 million, or 7.9%) in 2024/25. The overall increase in these regions was partially offset by decreases in Quebec (down $179 million, or 6.2%) and the Prairie Provinces and Territories (down $163 million, or 21.4%).

Exhibit 1-3 Film and television production in Canada, total volume and share by region* (total volume)

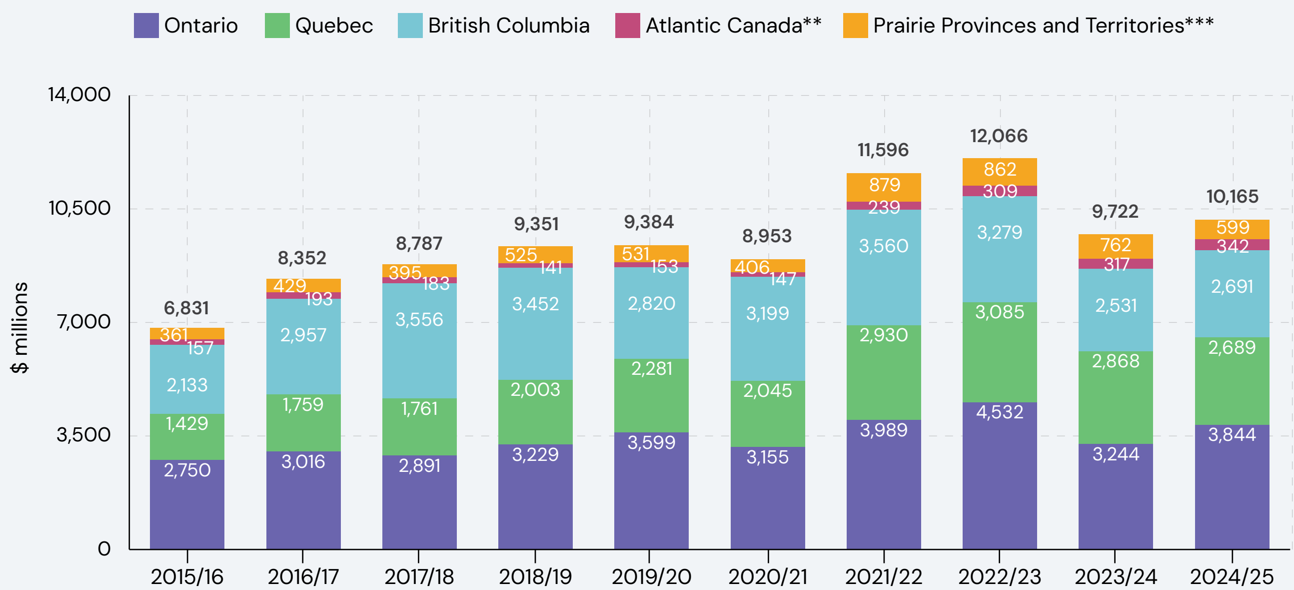
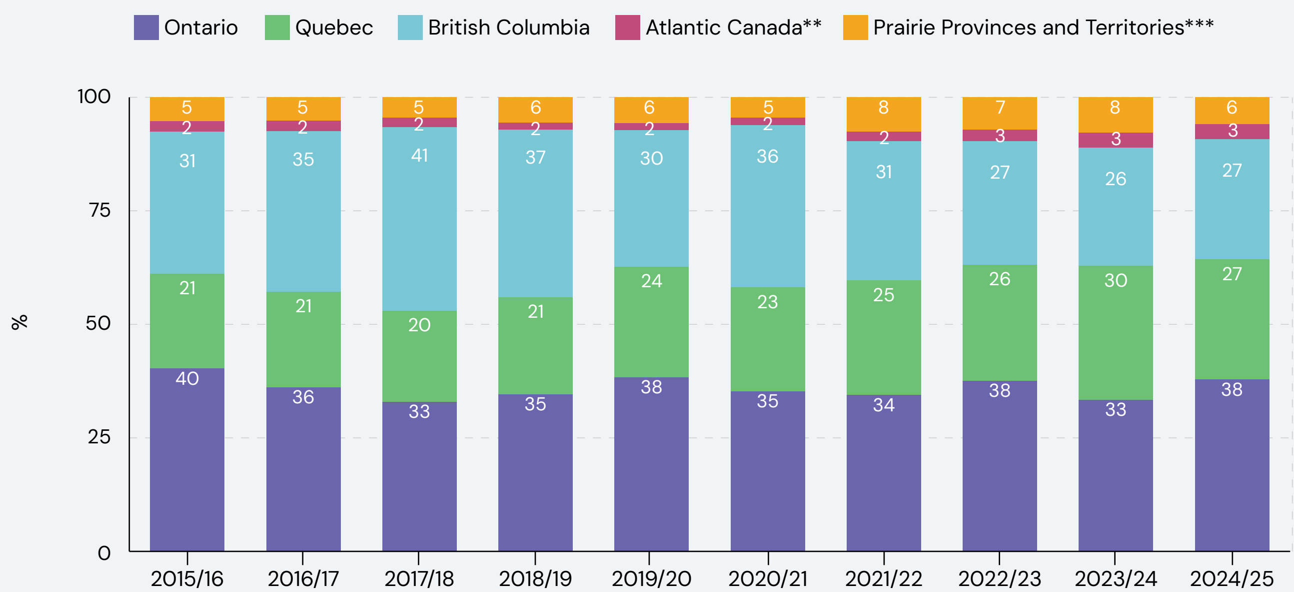


Exhibit 1-3 Film and television production in Canada, total volume and share by region* (share of total)



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

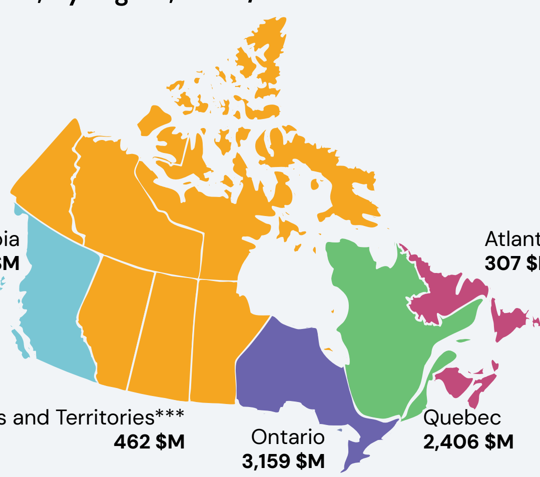
Total volume of film and television production in Canada, by region*, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Ontario	3,244	600	18.5
Quebec	2,868	-179	-6.2
British Columbia	2,531	160	6.3
Atlantic Canada**	317	25	7.9
Prairie Provinces and Territories***	762	-163	-21.4
Total	**9,722**	**443**	**4.6**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information. Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Ontario was home to the largest volume of film and television production in Canada, with $3.16 billion in external film and television production[6] (Exhibit 1 - 4a) and $3.84 billion in total film and television production in 2024/25 (Exhibit 1 - 4b). There were also significant production volumes in British Columbia (external production, $2.60 billion; total production, $2.69 billion) and Quebec (external production, $2.41 billion, total production, $2.69 billion).

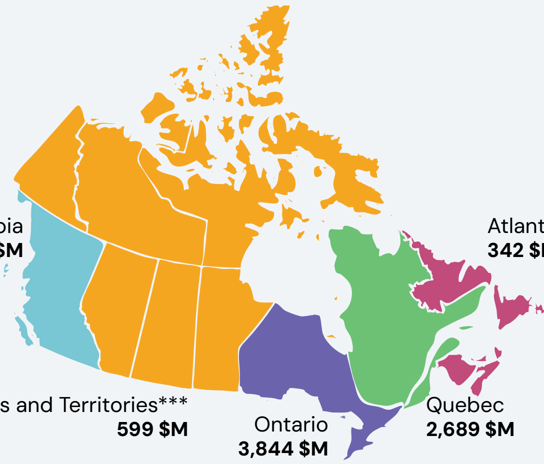
Exhibit 1-4 a) Total volume of external film and television production in Canada, excluding broadcaster in-house production, by region, 2024/25*



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
*External film and television production includes Canadian television production, Canadian theatrical film production and FLS production; it excludes broadcaster in-house production. Based on province or territory where lead producer is located.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

[6] External film and television production includes Canadian television production, Canadian theatrical film production and FLS production; it excludes broadcaster in-house production.

Exhibit 1-4 b) Total volume of film and television production in Canada, including broadcaster in-house production, by region, 2024/25*



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
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* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

1.3 Foreign investment in production

Overview of the screen sector in Canada

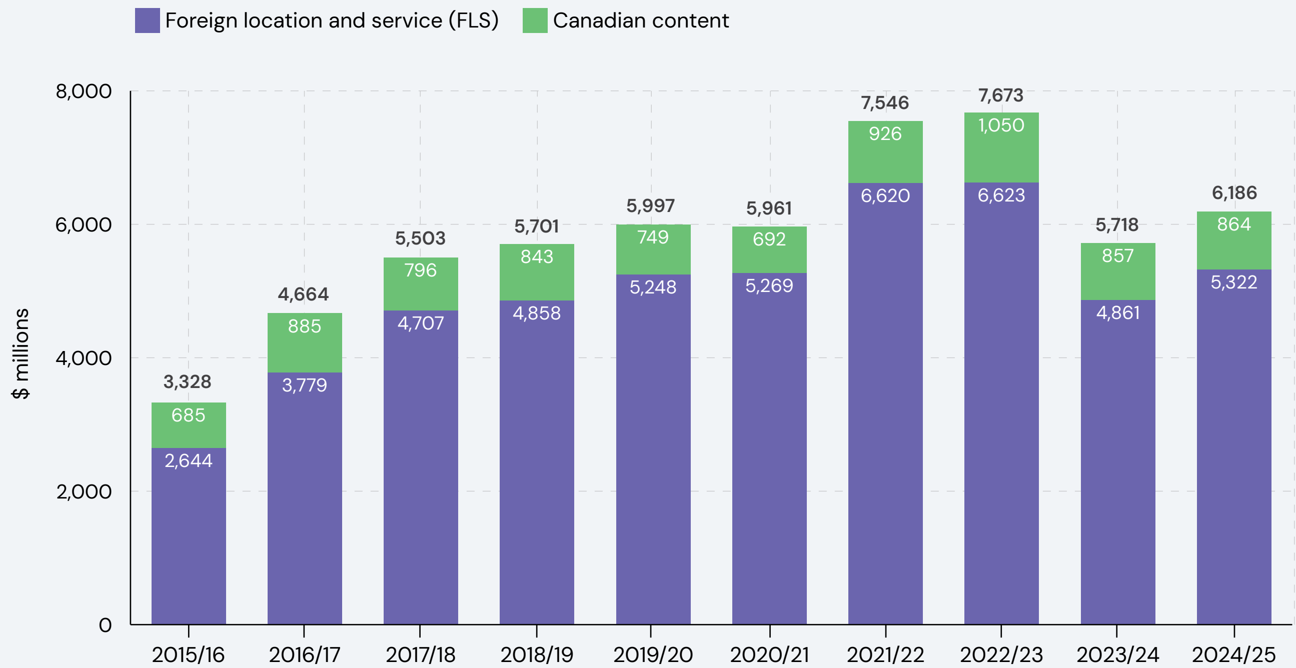
Foreign investment in production (FIIP) tracks the value of international financial participation in the film and television production industry in Canada. A major portion of that investment is FLS production. However, along with FLS production, significant investments are also made in the production of Canadian content. These types of investments include presales and distribution advances for Canadian content projects that are exported and distributed in foreign markets.

Foreign investment in Canadian content increased slightly to $864 million in 2024/25. Meanwhile, FLS production increased by $461 million, to $5.3 billion, making up 86% of FIIP.

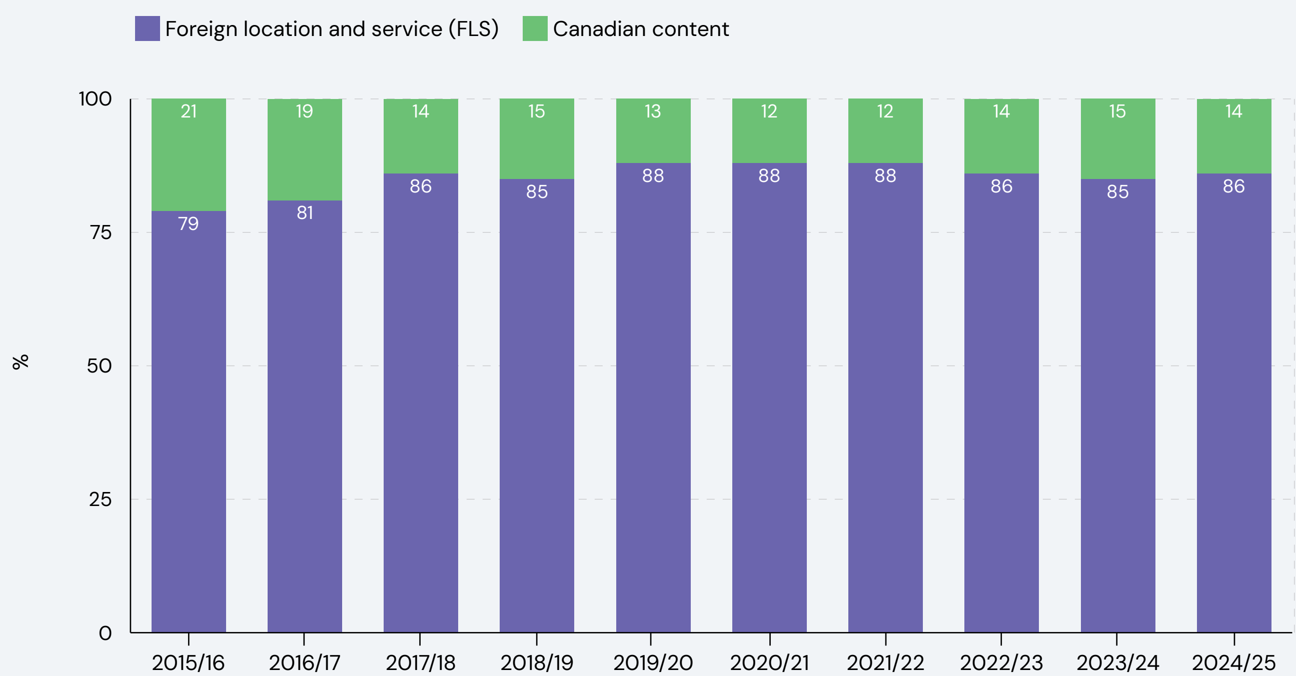
The vast majority of FIIP is generated by English-language content. In fact, out of the $864 million in FIIP generated by Canadian content in 2024/25, French-language content accounted for only $26 million (Canadian distributors $19 million + Foreign pre-sales and advances $7 million), or 2.8% (see data found in Exhibit 5 - 1c).

FIIP excludes the amount of revenue earned from the distribution of completed Canadian films and television programs to foreign broadcasters and distributors. However, the latest data published by Statistics Canada (and found in Section 9) indicates that these sales of completed content generated $126 million in 2023, meaning that foreign investments in Canadian content were worth over $1 billion.

Exhibit 1-5 a) Foreign investment in film and television production in Canada, by Canadian content and FLS production (total volume)



Foreign investment in film and television production in Canada, by Canadian content and FLS production (share of total)



Source:
Estimates based on data collected from CAVCO, CRTC, and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding. See Notes on methodology for the definition of FIIP. Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

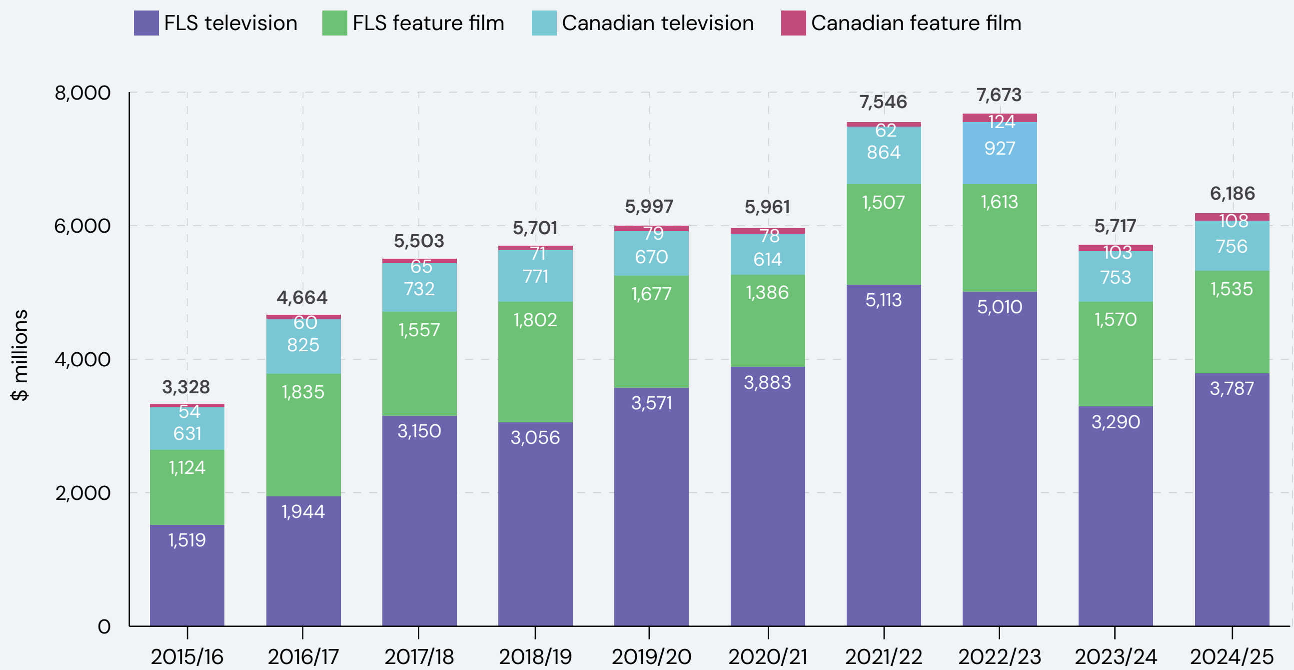
Foreign investment in film and television production in Canada, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Foreign location and service (FLS)	4,861	461	9.5
Canadian content	857	7	0.8
Total	**5,717**	**469**	**8.2**

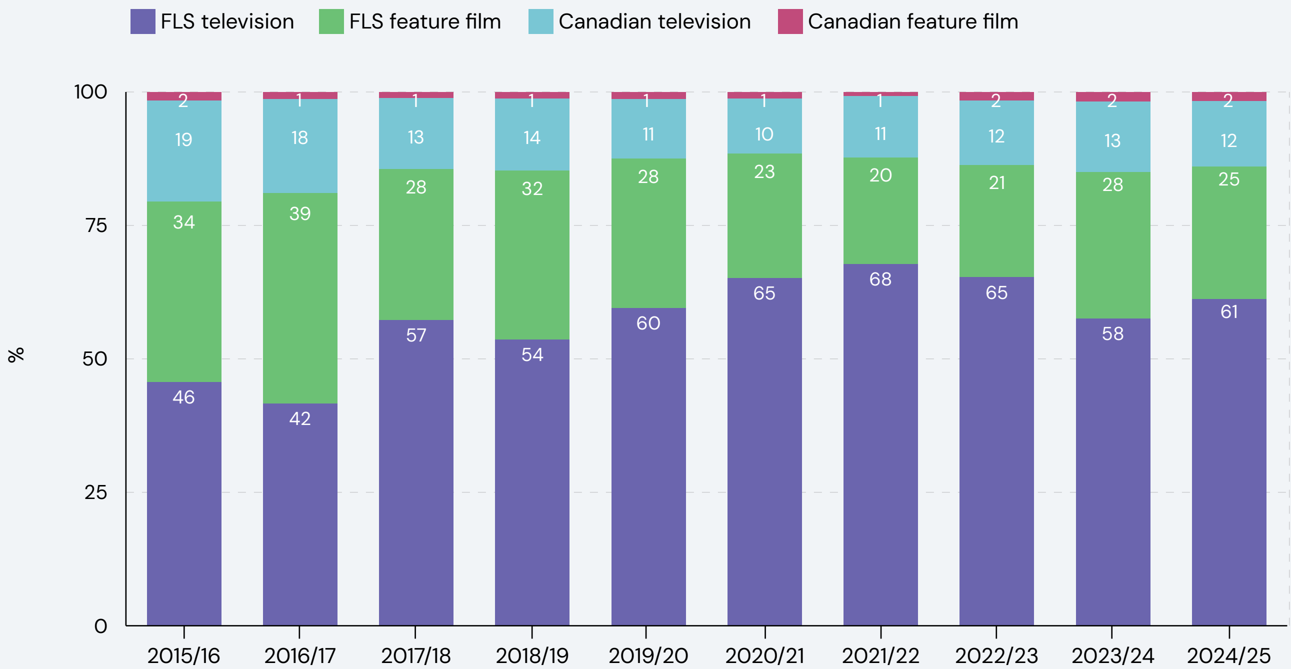
Source:
Estimates based on data collected from CAVCO, CRTC, and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding. See Notes on methodology for the definition of FIIP. Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

FLS television production grew significantly in 2024/25, growing by 15.1% or $497 million. Canadian television and Canadian theatrical feature film also increased by 0.3% and 5.0%, respectively. While FLS feature film decreased by 2.2%.

Exhibit 1-5 b) Foreign investment in film and television production in Canada, by segment and type (total volume)



Foreign investment in film and television production in Canada, by segment and type (share of total)



Source:
Estimates based on data collected from CAVCO, CRTC, and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding. See Notes on methodology for the definition of FIIP. Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

Foreign investment in film and television production in Canada, by segment and type, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
FLS television	3,290	497	15.1
FLS feature film	1,570	-35	-2.2
Canadian television	753	2	0.3
Canadian theatrical feature film	103	5	5
Total	**5,717**	**469**	**8.2**

Source:
Estimates based on data collected from CAVCO, CRTC, and the Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding. See Notes on methodology for the definition of FIIP. Excludes 'online-first' Canadian audiovisual production; see Box 1 for definitions and statistics.

1.4 Employment and economic contribution

Overview of the screen sector in Canada

Exhibit 1-6 Number of jobs (i.e. person-count) generated by film and television production in Canada

CANADIAN TELEVISION PRODUCTION	2020/21	2021/22	2022/23	2023/24	2024/25
Direct	36,180	47,340	48,780	40,140	37,620
Spin-off	21,950	27,440	27,330	21,950	20,380
Total	**58,130**	**74,780**	**76,110**	**62,090**	**58,000**
CANADIAN THEATRCAL FEATURE FILM PRODUCTION	2020/21	2021/22	2022/23	2023/24	2024/25
Direct	3,780	4,500	5,940	5,940	5,400
Spin-off	2,240	2,580	3,250	3,250	3,020
Total	**6,020**	**7,080**	**9,190**	**9,190**	**8,420**
CANADIAN CONTENT PRODUCTION	2020/21	2021/22	2022/23	2023/24	2024/25
Direct	39,960	51,840	54,720	46,080	43,020
Spin-off	24,190	30,020	30,580	25,200	23,400
Total	**64,150**	**81,860**	**85,300**	**71,280**	**66,420**
FLS PRODUCTION	2020/21	2021/22	2022/23	2023/24	2024/25
Direct	80,460	88,020	85,320	60,480	63,540
Spin-off	48,720	51,180	47,710	33,150	34,380
Total	**129,180**	**139,200**	**133,030**	**93,630**	**97,920**
BROADCASTER IN-HOUSE PRODUCTION	2020/21	2021/22	2022/23	2023/24	2024/25
Direct	10,080	8,960	9,630	9,070	9,070
Spin-off	9,860	8,400	8,620	7,950	7,950
Total	**19,940**	**17,360**	**18,250**	**17,020**	**17,020**
GRAND TOTAL	2020/21	2021/22	2022/23	2023/24	2024/25
Direct	130,500	148,820	149,670	115,630	115,630
Spin-off	82,770	89,600	86,910	66,300	65,730
Total	**213,270**	**238,420**	**236,580**	**181,930**	**181,360**

Source:
Estimates based on Nordicity research and data collected from CAVCO, CRTC, the Association of Provincial Television and Film Agencies, unions and guilds, and Statistics Canada.
Note:
See Notes on methodology for a description of the job-estimation methodology.

Number of jobs (i.e. person-count) generated by film and television production in Canada, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH 2024/25	GROWTH (%) 2024/25
Foreign location and service (FLS)	93,630	4,290	4.6
Canadian television	62,090	-4,090	-6.6
Canadian theatrical feature film	9,190	-770	-8.4
Broadcaster in-house	17,020	0	0
Total	**181,930**	**-570**	**-0.3**

Source:
Estimates based on Nordicity research and data collected from CAVCO, CRTC, the Association of Provincial Television and Film Agencies, unions and guilds, and Statistics Canada.
Note:
See Notes on methodology for a description of the job-estimation methodology.

Exhibit 1-7 Labour income impact of film and television production in Canada ($ millions)

2023/24 LABOUR INCOME	DIRECT	SPIN-OFF	TOTAL
Canadian television production	1,836	1,193	3,029
Canadian theatrical feature film production	271	177	448
Canadian content production	2,107	1,370	3,477
FLS production	2,771	1,802	4,573
Broadcaster in-house production	664	432	1,096
Total	**5,542**	**3,604**	**9,146**

2024/25 LABOUR INCOME	DIRECT	SPIN-OFF	TOTAL
Canadian television production	1,799	1,192	2,991
Canadian theatrical feature film production	262	177	439
Canadian content production	2,061	1,369	3,430
FLS production	3,034	2,011	5,045
Broadcaster in-house production	700	465	1,165
Total	**5,795**	**3,845**	**9,640**

Source:
Estimates based on Nordicity research and data collected from CAVCO, CRTC, the Association of Provincial Television and Film Agencies, unions and guilds, and Statistics Canada.
Note:
See Notes on methodology for a description of labour income methodology.

Exhibit 1-8 GDP impact of film and television production in Canada ($ millions)

2023/24 GDP ($ MILLIONS)	DIRECT	SPIN-OFF	TOTAL
Canadian television production	1,900	1,801	3,701
Canadian theatrical feature film production	280	262	542
Canadian content production	2,180	2,063	4,243
FLS production	2,868	2,715	5,583
Broadcaster in-house production	688	690	1,378
Total	**5,736**	**5,468**	**11,204**
2024/25 GDP ($ MILLIONS)	DIRECT	SPIN-OFF	TOTAL
Canadian television production	1,862	1,764	3,626
Canadian theatrical feature film production	271	254	525
Canadian content production	2,133	2,018	4,151
FLS production	3,140	2,972	6,112
Broadcaster in-house production	725	727	1,452
Total	**5,998**	**5,717**	**11,715**

Source:
Estimates based on Nordicity research and data collected from CAVCO, CRTC, the Association of Provincial Television and Film Agencies, unions and guilds, and Statistics Canada.
Note:
See Notes on methodology for a description of GDP methodology.

Screen sector value chain segments

While film and television production is the largest source of economic impact within the screen sector value chain (Exhibit 1-9), the other value chain industries also generate significant economic impacts.

- The distribution industry in Canada generated employment for 5,950 people, as well as $362 million in labour income and $630 million in GDP in 2023.
- The exhibition industry generated employment for 19,720 people, as well as $618 million in labour income and $1.16 billion in GDP in 2024.
- The television-broadcasting industry generated employment for 17,450, as well as $1.42 billion in labour income and $2.11 billion in GDP in 2024.
- The broadcasting distribution undertaking (BDU) industry generated employment for 39,940 people, as well as $2.96 billion in labour income and more than $4.30 billion in GDP in 2024.

Combining estimates of the economic impact from the most recent year of published data indicates that the screen sector value chain in Canada generated an estimated 264,420 jobs, $15.00 billion in labour income and $19.91 billion in GDP for the Canadian economy (both direct and spin-off impacts).

Exhibit 1-9 Economic impact of selected segments in the screen sector value chain

EMPLOYMENT (NUMBER OF JOBS)	DIRECT	SPIN-OFF	TOTAL
Film and TV production (2024/25)	115,630	65,730	181,360
Distribution (2023)	870	5,080	5,950
Exhibition (2024)	10,320	9,400	19,720
Broadcasting* (2024)	4,630	12,820	17,450
Broadcasting distribution (2024)	20,050	19,890	39,940
Total	**151,500**	**112,920**	**264,420**

LABOUR INCOME ($ MILLIONS)	DIRECT	SPIN-OFF	TOTAL
Film and TV production (2024/25)	5,795	3,845	9,640
Distribution (2023)	119	243	362
Exhibition (2024)	196	422	618
Broadcasting* (2024)	632	785	1,417
Broadcasting distribution (2024)	2,012	948	2,960
Total	**8,754**	**6,243**	**14,997**

GDP ($ MILLIONS)	DIRECT	SPIN-OFF	TOTAL
Film and TV production (2024/25)	5,998	5,717	11,715
Distribution (2023)	204	426	630
Exhibition (2024)	372	783	1,155
Broadcasting* (2024)	861	1,250	2,111
Broadcasting distribution (2024)	2,596	1,700	4,296
Total	**10,031**	**9,876**	**19,907**

Source:
Estimates based on Nordicity research and data collected from CAVCO, CRTC, CBC/Radio-Canada, the Association of Provincial Television and Film Agencies, unions and guilds, and Statistics Canada.
Note:
See Notes on methodology for a description of the methodology.
* Excludes in-house production, which is included in Film and TV production

2 Canadian content production

Canadian content production consists of all films and television programs certified as Canadian content by the Canadian Audio-Visual Certification Office (CAVCO), or the Canadian Radio-television and Telecommunications Commission (CRTC).[7] Most Canadian content productions are made by independent production companies, although broadcaster-affiliated production companies also account for some production in this segment.

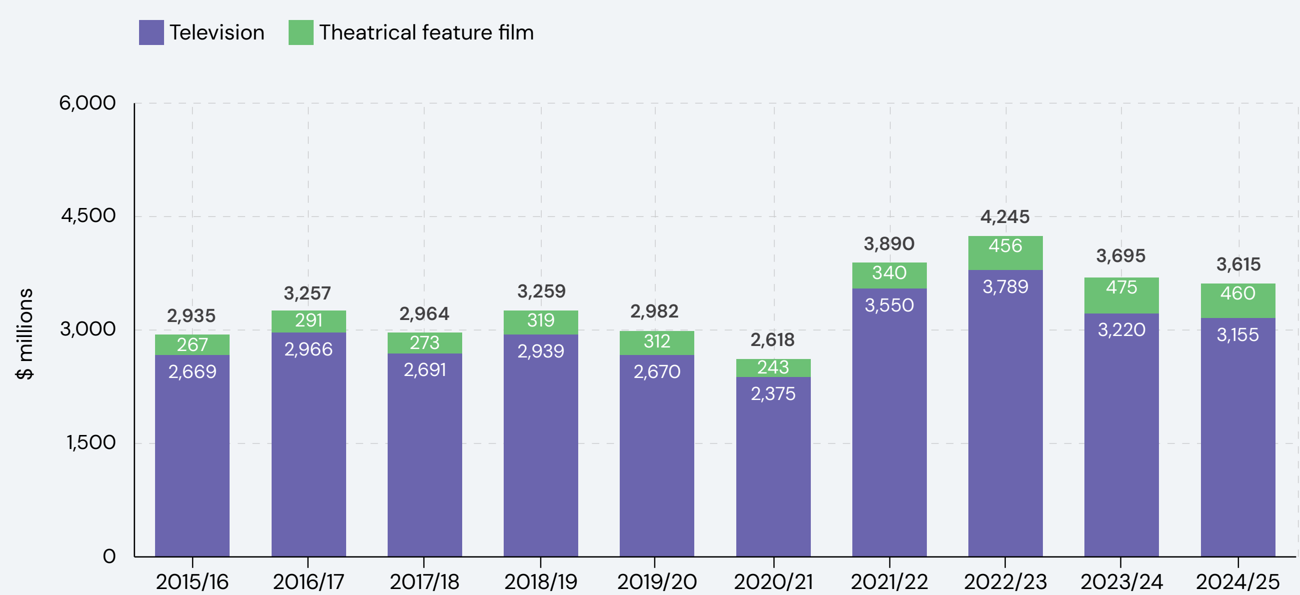
Highlights 2024/25

- Canadian content production decreased by 2.2% to $3.62 billion.
  - Almost all of this decline was in the television segment, which decreased by 2.0%, or a total of $65 million.
  - English-language production decreased by 5.3% to $2.49 billion, with decreases of 3.2% in television production and 13.8% in film production.
  - French-language production increased by 5.4% to $1.13 billion, with increases in both television production (2.3%) and film production (35.0%).[8] Of note, this increase is only a partial rebound from the decline in French-language production last year, and at a total level lower than each of the last three years.
- The share of French-language production increased by 2% to 31%, with English-language production continuing to proportionately decrease (now at 69%).
- The significant majority of Canadian content production continued to be led by producers in Ontario (43%) and Quebec (34%).
- The shares of programming categories remained consistent. The majority of Canadian content production was still in fiction (57%, or $2.06 billion), followed by children's and youth (14%), lifestyle and human interest (13%), documentary (11%) and variety and performing arts (5%).
- English-language production represents a greater share of total volume in the fiction (76%), children's and youth (77%) and documentary (71%) categories, while French-language production represents a greater share of total volume in the lifestyle and human interest (55%) and variety and performing arts (83%) categories.

2.1 Release medium

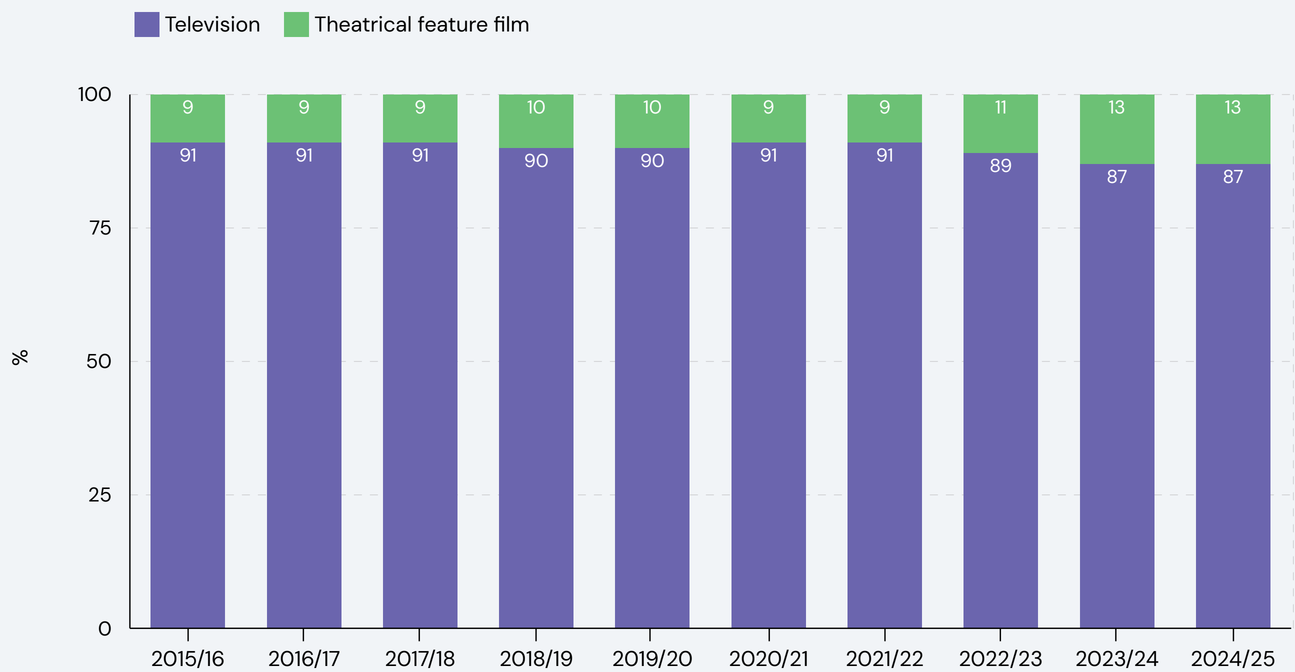
Canadian content production

Exhibit 2-1 Canadian content production, volume and share by primary release medium (total volume)



[7] Excludes audiovisual content made for initial release on online services. See Box 1.
[8] Production volume in feature film can fluctuate because of the timing or number and size of projects. For example, the 41% increase in French-language film production reflects a bounce back from a low level in the prior year and is consistent with the range of production activity experienced in years before that.

Canadian content production, volume and share by primary release medium (share of total)



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.

Volume of Canadian content production, by primary release medium, annual growth 2024/25

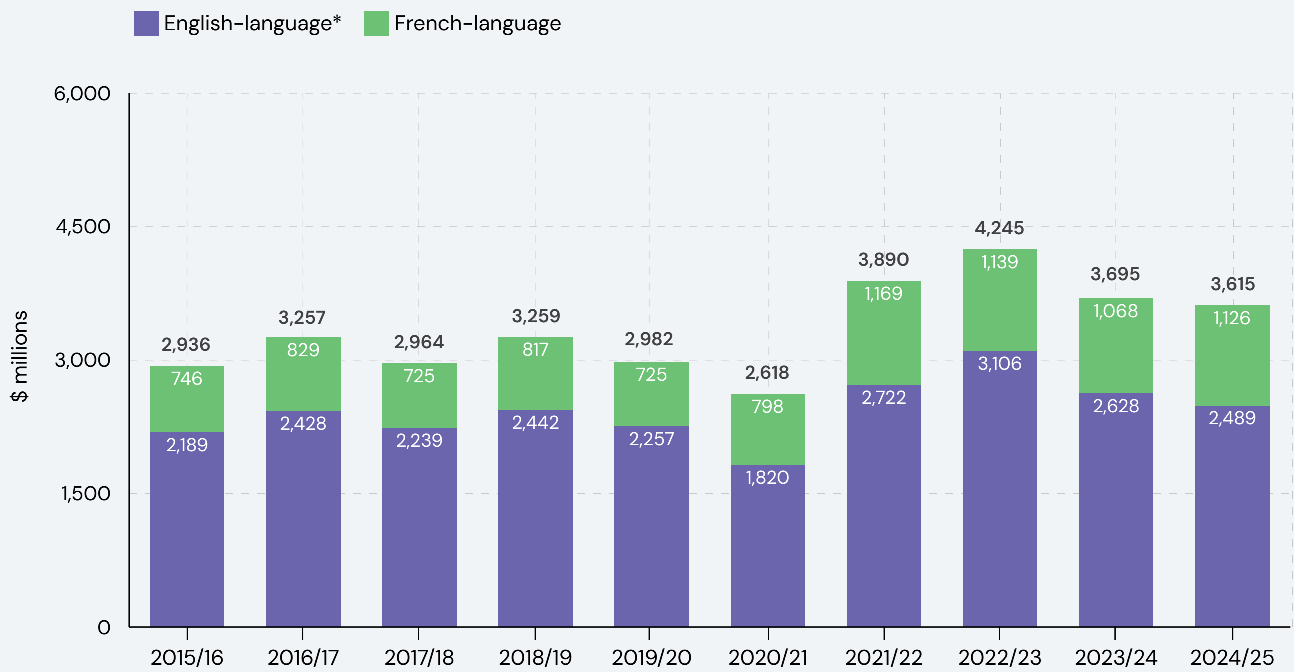
	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Television	3,220	-65	-2
Theatrical feature film	475	-15	-3.2
Total	**3,695**	**-80**	**-2.2**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.

2.2 Language

Canadian content production

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



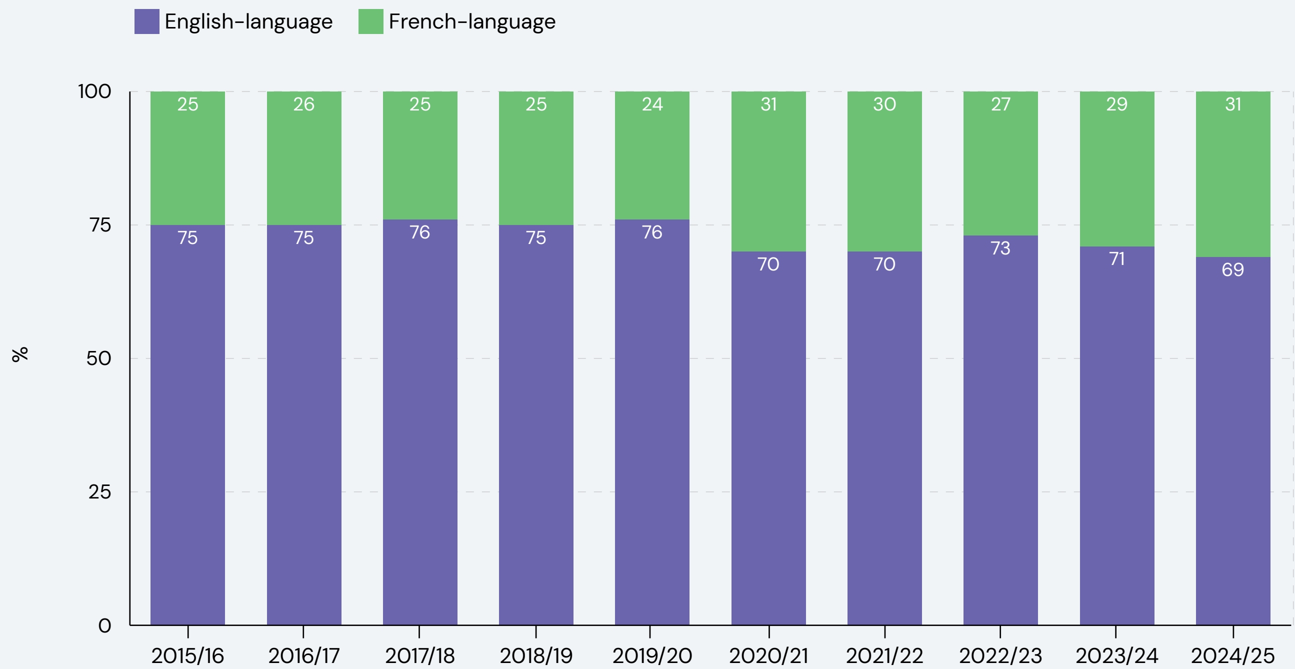
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production between 2014/15 and 2024/25 and which cannot be reported separately due to confidentiality issues arising from low production volume.

Volume of Canadian content production, by language, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
English-language*	2,628	-139	-5.3
French-language	1,068	58	5.4
Total	**3,695**	**-80**	**-2.2**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production between 2014/15 and 2024/25 and which cannot be reported separately due to confidentiality issues arising from low production volume.

Exhibit 2-3 Share of total volume of Canadian content production, by language

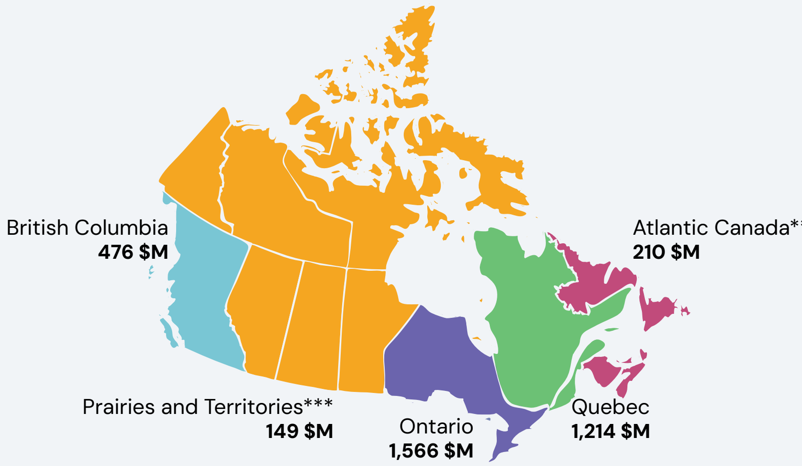


Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production between 2014/15 and 2024/25 and which cannot be reported separately due to confidentiality issues arising from low production volume.

2.3 Region

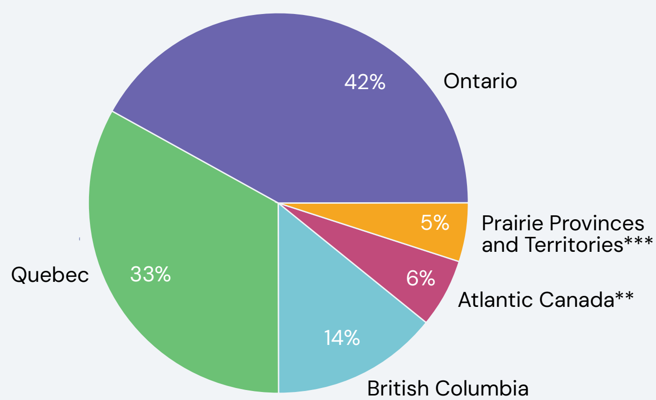
Canadian content production

Exhibit 2-4 Volume of Canadian content production, by region*, 2024/25



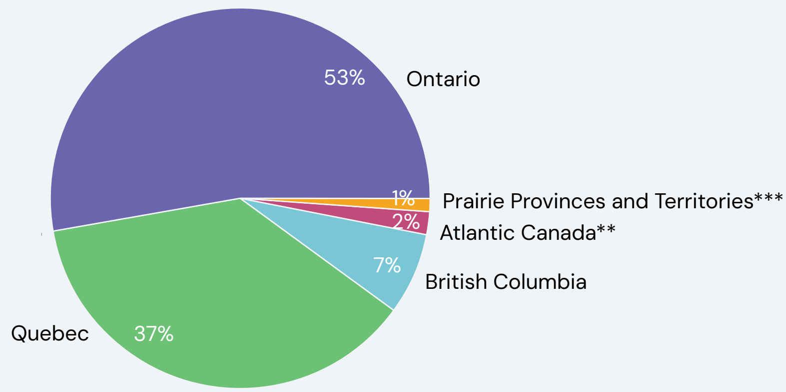
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Exhibit 2-5 a) Share of total volume of Canadian television content production, by region, 2024/25*



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Exhibit 2-5 b) Share of total volume of Canadian theatrical feature film content production, by region, 2024/25*



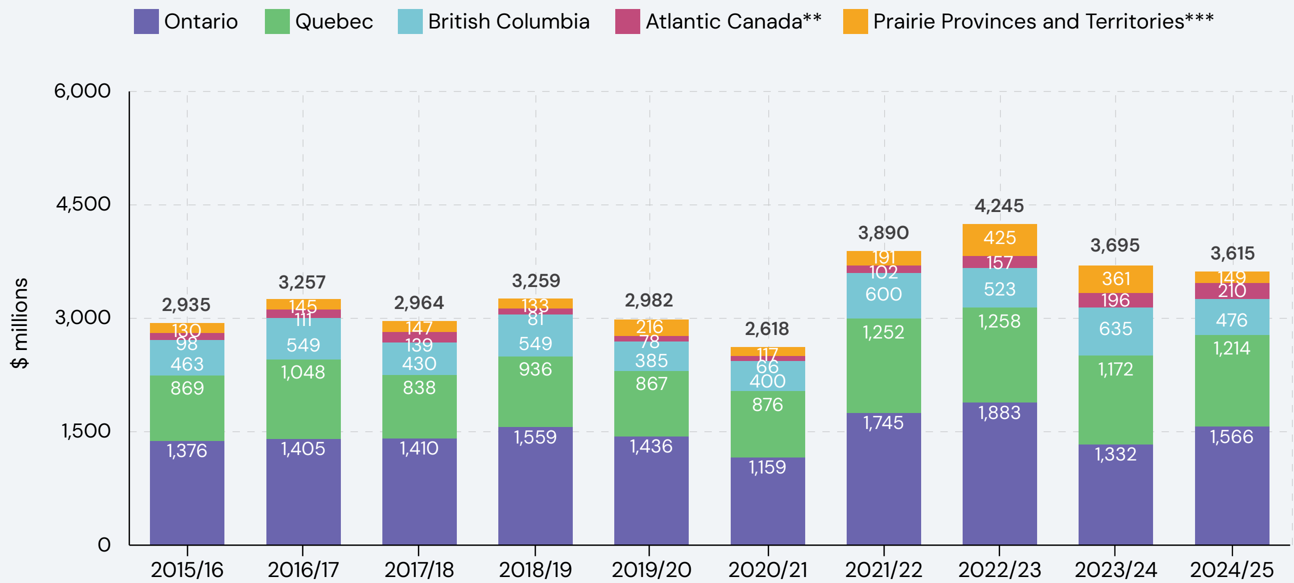
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Production data in *Profile* is based on the province or territory where the lead producer is located. To provide another perspective, CAVCO has also provided data based on the location where the project was filmed. Using this methodology, the entire costs of a film or television project has been assigned to the province or territory with the highest number of filming days. Topline data by region of filming is provided in Exhibit 2-6b below. Of note, it is only provided in this section, and not elsewhere in the report.

When looking by region of lead producer, the 2.2% overall decrease in the volume of Canadian content production in 2024/25 was driven by significant decreases in British Columbia (down $159 million) and the Prairie Provinces and Territories (down $212 million). This was partially offset by increases in Ontario (up $234 million), Quebec (up $42 million) and Atlantic Canada (up $14 million).

However, production data based on the region of filming provide additional context, specifically in relation to the fluctuations in production volume noted above. The overall increases of Canadian content production in Ontario ($75 million) and Quebec ($13 million) are much lower, offset by decreases in volume in British Columbia and the Prairie Provinces and Territories.

Exhibit 2-6 a) Volume of Canadian content production, by region of lead producer



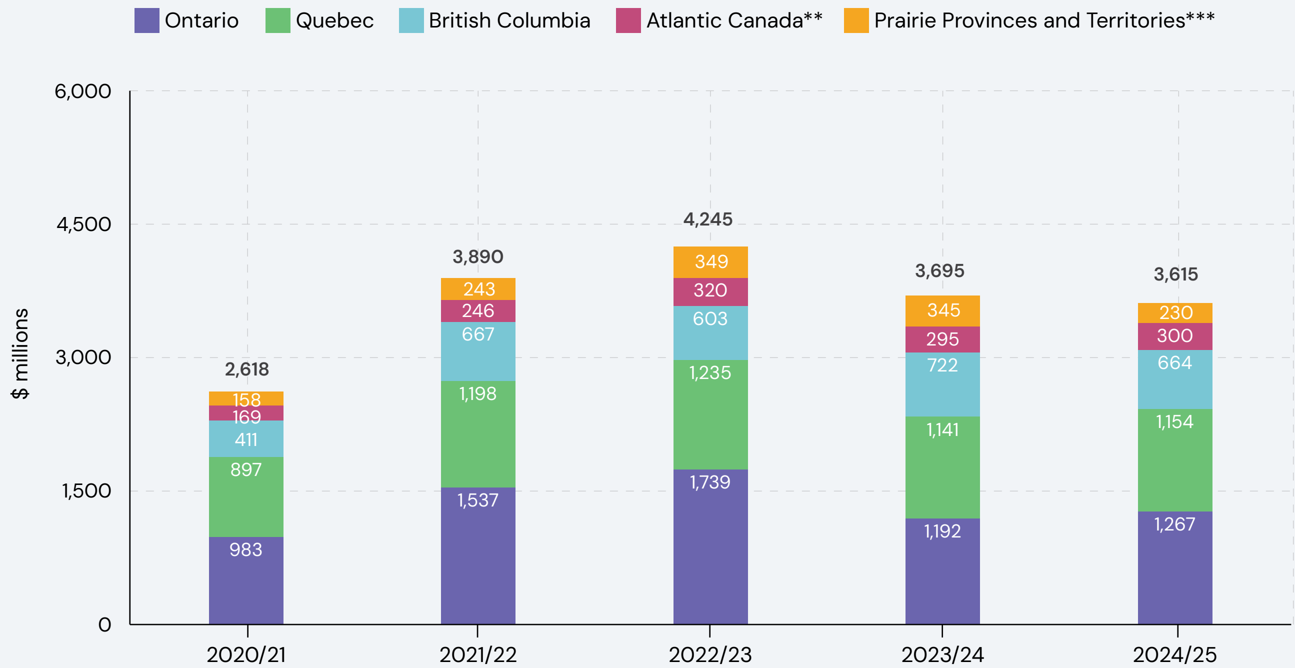
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Volume of Canadian content production, by region of lead producer, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Ontario	1,332	234	17.6
Quebec	1,172	42	3.6
British Columbia	635	-159	-25
Atlantic Canada**	196	14	7.1
Prairie Provinces and Territories***	361	-212	-58.7
Total	**3,695**	**-80**	**-2.2**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Exhibit 2-6 b) Volume of Canadian content production, by region of filming



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
* The entire cost of a film or TV project has been assigned to the province or territory with the highest number of filming days.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Volume of Canadian content production, by region of filming, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Ontario	1,192	75	6.2
Quebec	1,141	13	1.1
British Columbia	722	-58	-8
Atlantic Canada**	295	5	1.7
Prairie Provinces and Territories***	345	-115	-33.4
Total	**3,695**	**-80**	**-2.2**

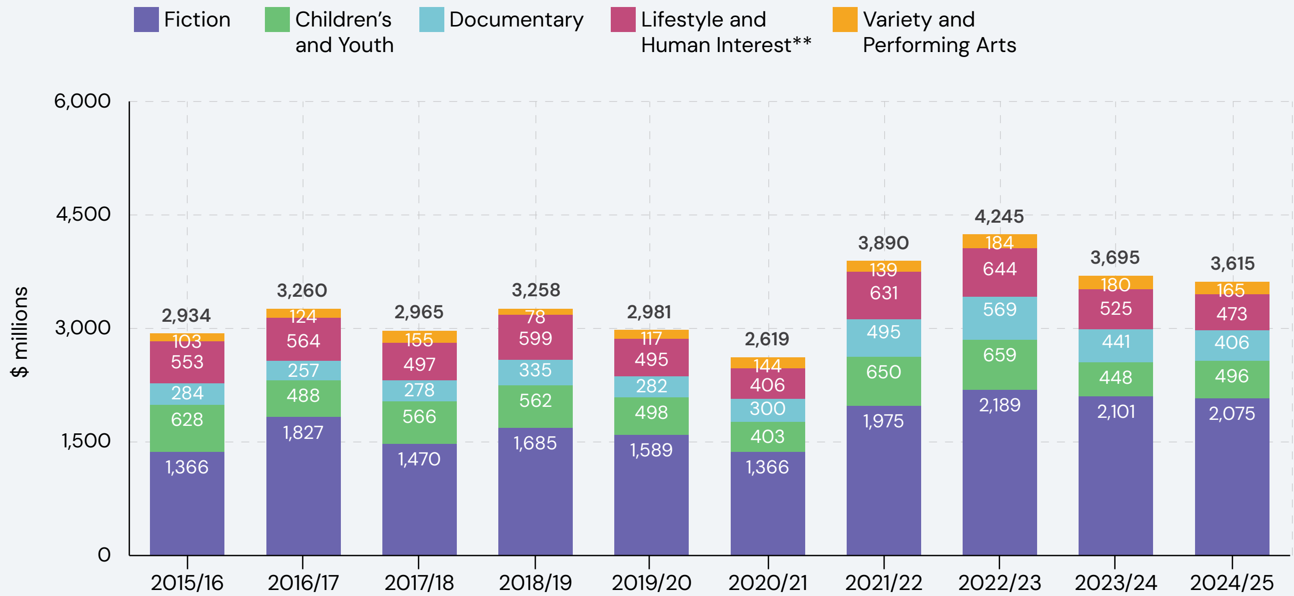
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
* The entire cost of a film or TV project has been assigned to the province or territory with the highest number of filming days.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

2.4 Program categories

Canadian content production

The annual decrease in production volume was driven by decreases in fiction (by 1.3% to $2.08 billion), documentary (by 7.9% to $406 million), variety and performing arts (by 8.3% to $165 million), and lifestyle and human interest (by 9.8% to $473 million). This was partially offset by an increase in children's and youth (by 10.6% to $496 million).

Exhibit 2-7 a) Volume of Canadian content production, by category*



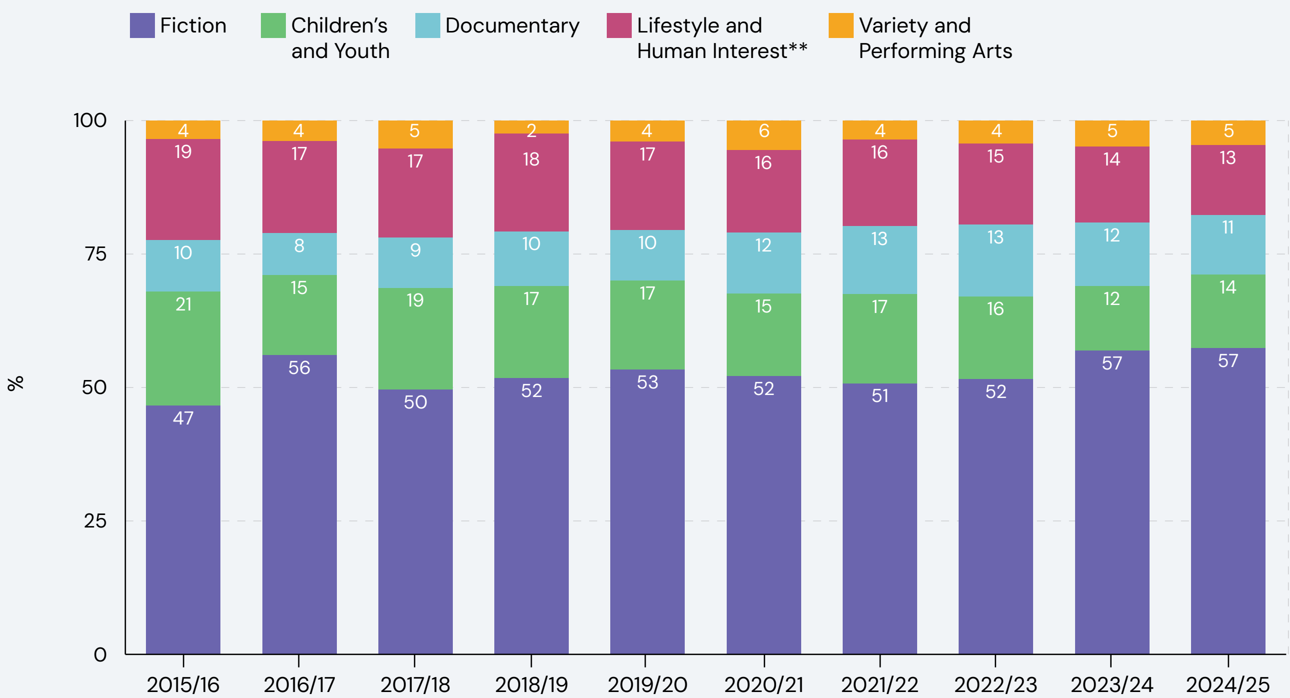
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Due to low numbers of lifestyle and human interest, and variety and performing arts productions in the theatrical market, the theatrical volumes have been merged into the fiction cateogry.
**Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

Volume of Canadian content production, by category*, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Fiction	2,101	-26	-1.3
Children's and youth	448	48	10.6
Documentary	441	-35	-7.9
Lifestyle and human interest**	525	-52	-9.8
Variety and performing arts	180	-15	-8.3
Total	**3,695**	**-80**	**-2.2**

Source:
Source: Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Due to low numbers of lifestyle and human interest, and variety and performing arts productions in the theatrical market, the theatrical volumes have been merged into the fiction cateogry.
**Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

Exhibit 2-7 b) Share of total volume of Canadian content production, by category*



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Due to low numbers of lifestyle and human interest, and variety and performing arts productions in the theatrical market, the theatrical volumes have been merged into the fiction cateogry.
**Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

Exhibit 2-8 Number of Canadian content projects, by category and primary release medium, 2024/25

NUMBER OF PROJECTS	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST*	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Television programming	323	97	349	220	86	1,075
Theatrical feature films	94	7	32	n/a	n/a	133
Total	**417**	**104**	**381**	**220**	**86**	**1,208**
SHARE OF TOTAL (%)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST*	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Television program-ming	77	93	92	100	100	89
Theatrical feature films	23	7	8	n/a	n/a	11
Total	**100**	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional cateogry.
n/a: Due to low numbers of lifestyle and human interest, and variety and performing arts productions in the theatrical market, theatrical project numbers have been merged into the fiction category.

Exhibit 2-9 Volume of Canadian content production, by category and language, 2024/25

TOTAL VOLUME ($ MILLIONS)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST*	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
English-language**	1,575	382	293	210	28	2,489
French-language	500	114	113	262	137	1,126
Total	**2,075**	**496**	**406**	**473**	**165**	**3,615**

SHARE OF TOTAL (%)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST*	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
English-language**	77	93	92	100	100	89
French-language	23	7	8	n/a	n/a	11
Total	**100**	**100**	**100**	**100**	**100**	**100**

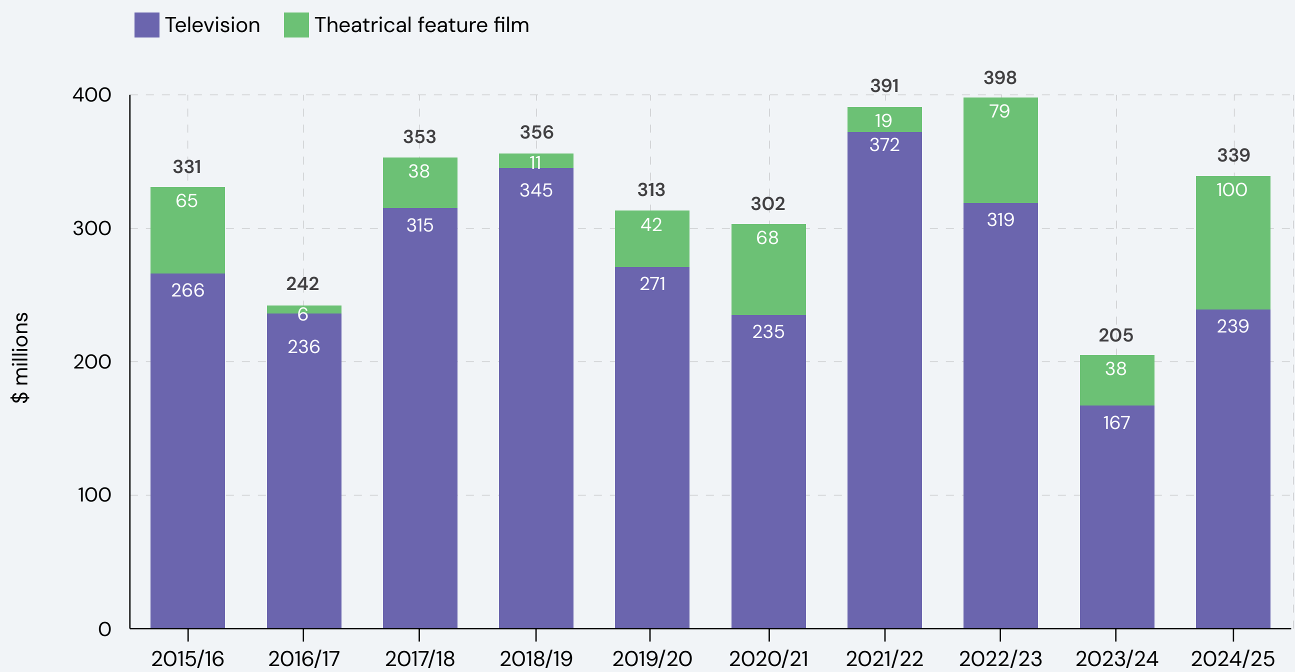
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
*Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.
**Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production between 2011/12 and 2024/25 and cannot be reported separately due to confidentiality issues arising from low production volume.

2.5 Animation

Canadian content production

Animation production increased by 65.4% to $339 million. However, that should be more appropriately characterized as a partial bounce back from a significant decrease in the prior year. The increase in animation volume would similarly explain the increase in children's and youth production noted above.

Exhibit 2-10 Volume of Canadian animation production, by primary release medium



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.

Volume of Canadian animation production, by primary release medium, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Television	167	72	43.1
Theatrical feature film	38	62	163.2
Total	**205**	**134**	**65.4**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.

2.6 Canada Media Fund

Canadian content production

The Canada Media Fund (CMF) is funded by the Government of Canada, as well as cable-television, direct-to-home (DTH) satellite and Internet protocol television (IPTV) service providers (collectively also known as broadcasting distribution undertakings (BDUs)). It fosters, develops, finances and promotes the production of Canadian content and applications for all audiovisual media platforms.

In 2024/25, the CMF had an overall program budget of $369 million.[9] Prior to 20204/25, the CMF provided funding in accordance with its Convergent and Experimental Streams model. Beginning in 2024/25, however, the CMF moved away from that model and began funding the production of screen-based media content across three platform-agnostic pillars: Ideation, Creation and Industry.

- Ideation includes the funding of pre-development and development.
- Creation includes all programs offering funding for projects ready to move into production.
- Industry funding supports initiatives designed to strengthen the infrastructure and efficiency of Canada's audiovisual ecosystem.

CMF Highlights from 2024/25

- In the linear content space, CMF's funding for creation (i.e. production) totalled $290 million and supported $1.71 billion[10] in content production in 2024/25 and generated an estimated 31,400 jobs (including direct and spin-off impacts) – an increase from 30,700 in 2023/24.

- While CMF funding for linear content creation declined by $13 million in 2024/25 to $290 million, the total value of supported content production budgets actually increased by $123 million or 7.8% to a total of $1.71 billion, or 45% of Canadian television content production.

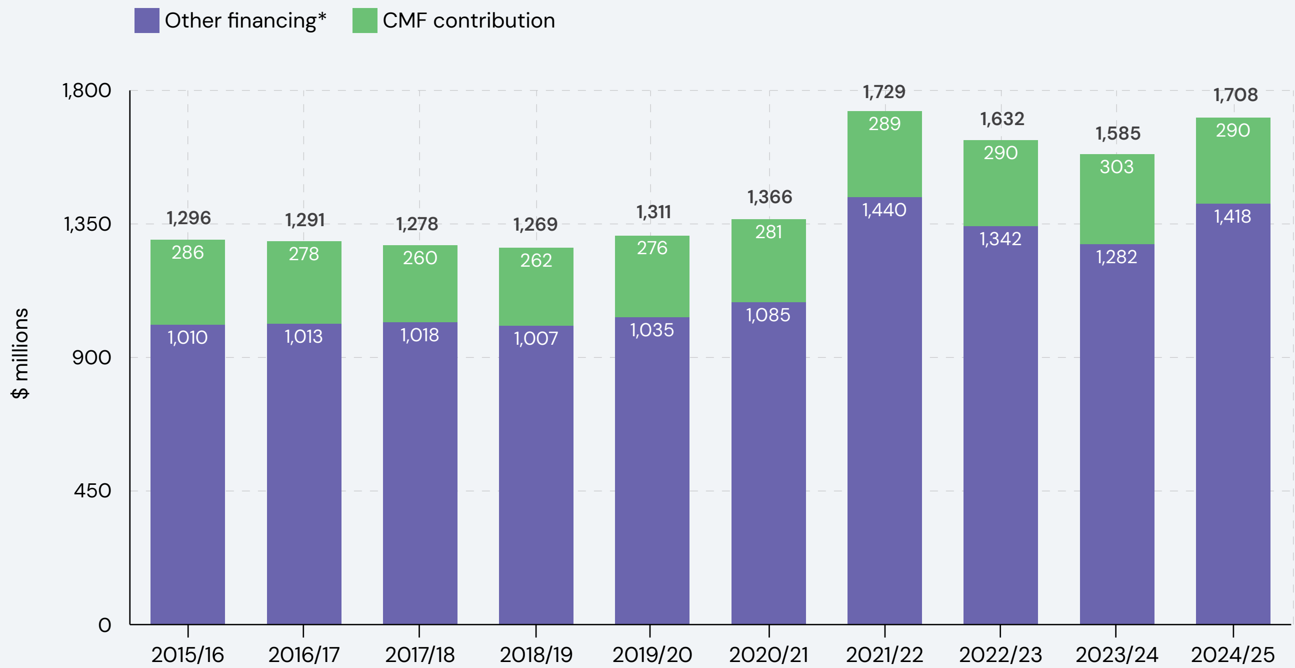
- The total number of supported hours of production was lower in all categories except variety and performing arts (Exhibit 2 - 13). As a result of the decrease in the total value of supported production budgets, the CMF's overall financial leverage also increased in 2024/25. Each dollar of CMF funding for linear content creation helped to attract $4.89 in additional financing, up from $4.23 in 2023/24.

While the CMF has experienced reduced revenues from BDUs in recent years due to decreasing subscriber levels, these reduced revenues have been partially offset by additional funding from the federal government.

- A stabilization fund was put into place in 2017 to compensate the CMF for decreases in BDU revenues to a maximum of $42.5 million; however, this cap was reached in 2023/24.
- Since 2021/22, the CMF has received various additional short-term allocations from the federal government to invest in projects and initiatives by Indigenous and equity-deserving communities, as well as French-language content. In 2024/25, the CMF received a total of $40 million for these initiatives.[11]

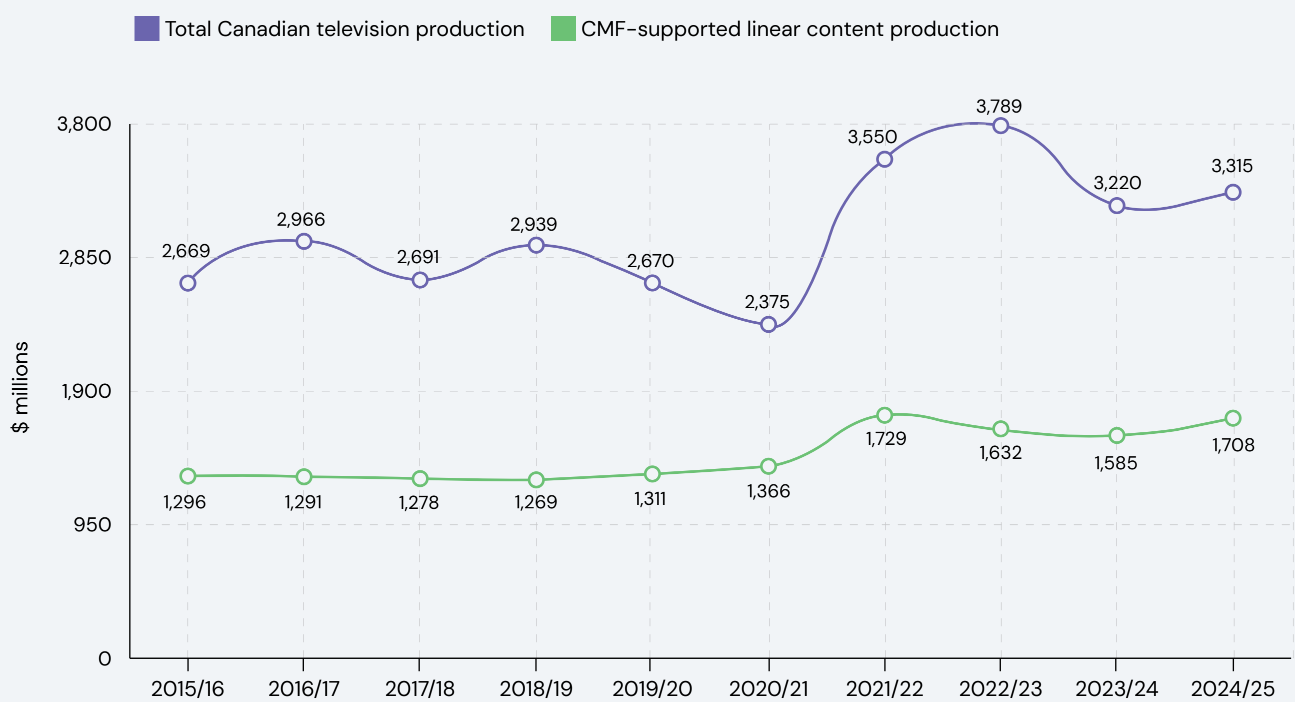
[9] Source: Canada Media Fund (2025) Built Different: CMF Annual Report 2024-2025. P. 53.
[10] Source: Canada Media Fund, custom tabulations.
[11] Canada Media Fund (2025). P. 16.

Exhibit 2-11 a) Volume of linear content production with CMF contributions



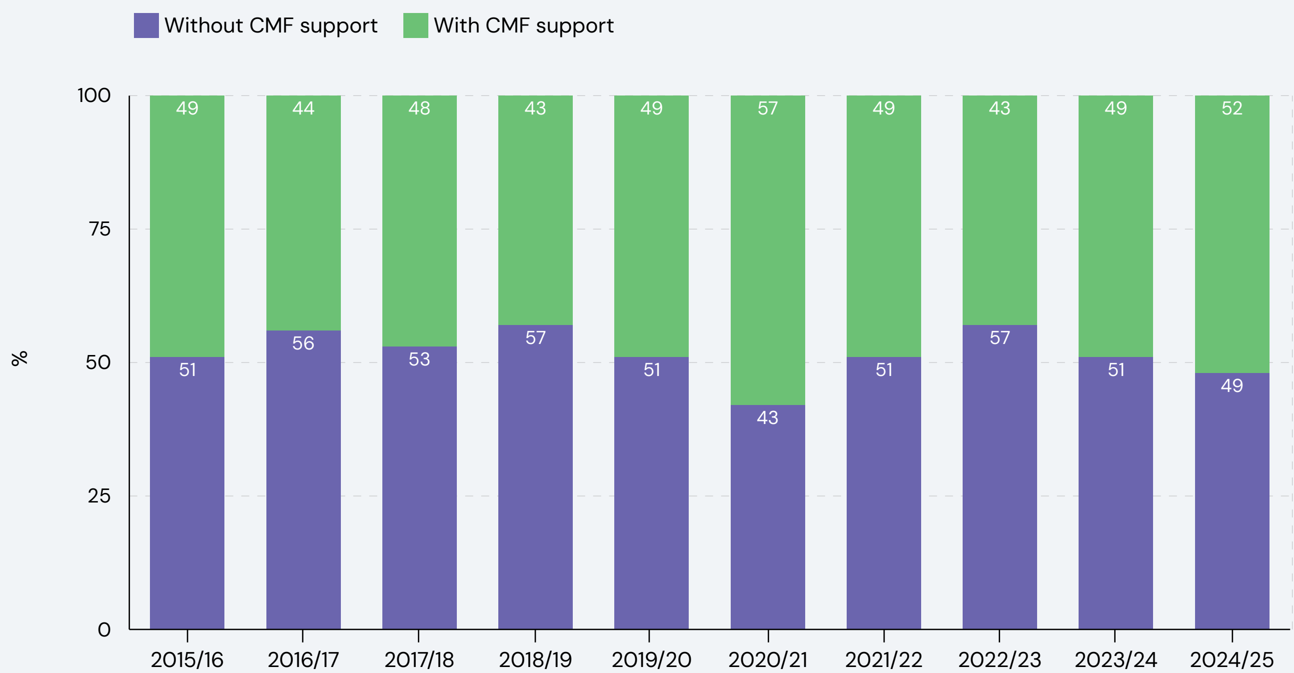
Source:
CMF.
Note:
* Other financing includes contributions from production companies, broadcasters, distributors and government sources other than CMF.

Exhibit 2-11 b) CMF-supported linear content production vs. total Canadian television production



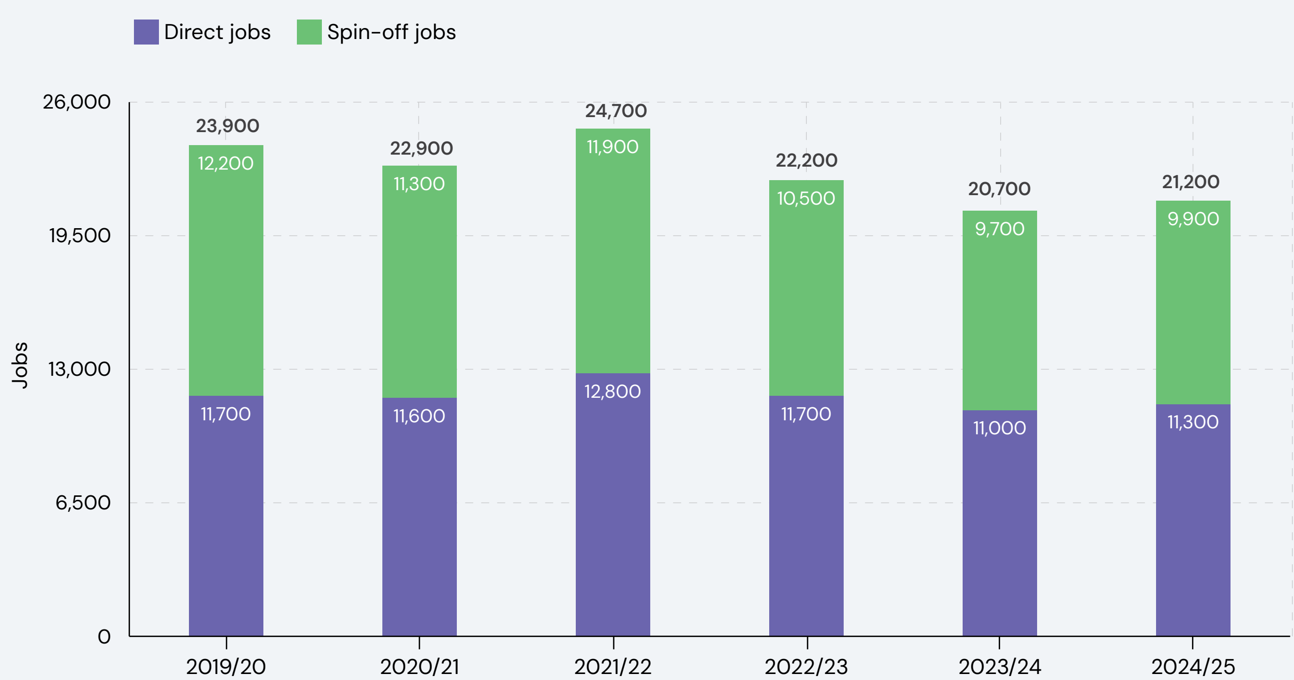
Source:
CMF and estimates based on data collected from CAVCO.

Exhibit 2-11 c) CMF-supported linear content production as a share of total Canadian television production



Source:
CMF and estimates based on data collected from CAVCO.

Exhibit 2-12 Number of jobs (i.e. person-count) generated by CMF-supported production



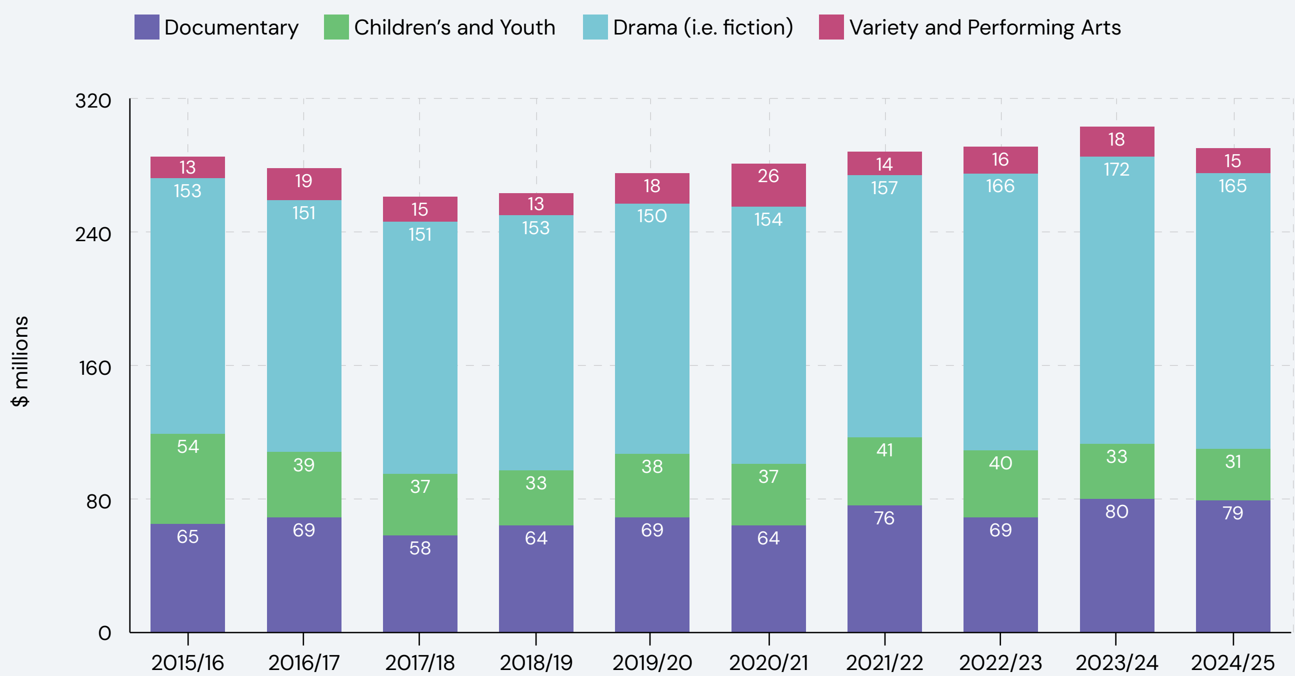
Source:
Estimates based on data from the CMF and Statistics Canada.
Note:
See the Notes on methodology section for a description of the job-estimation methodology.

Exhibit 2-13 Number of CMF-supported hours of television production, by category

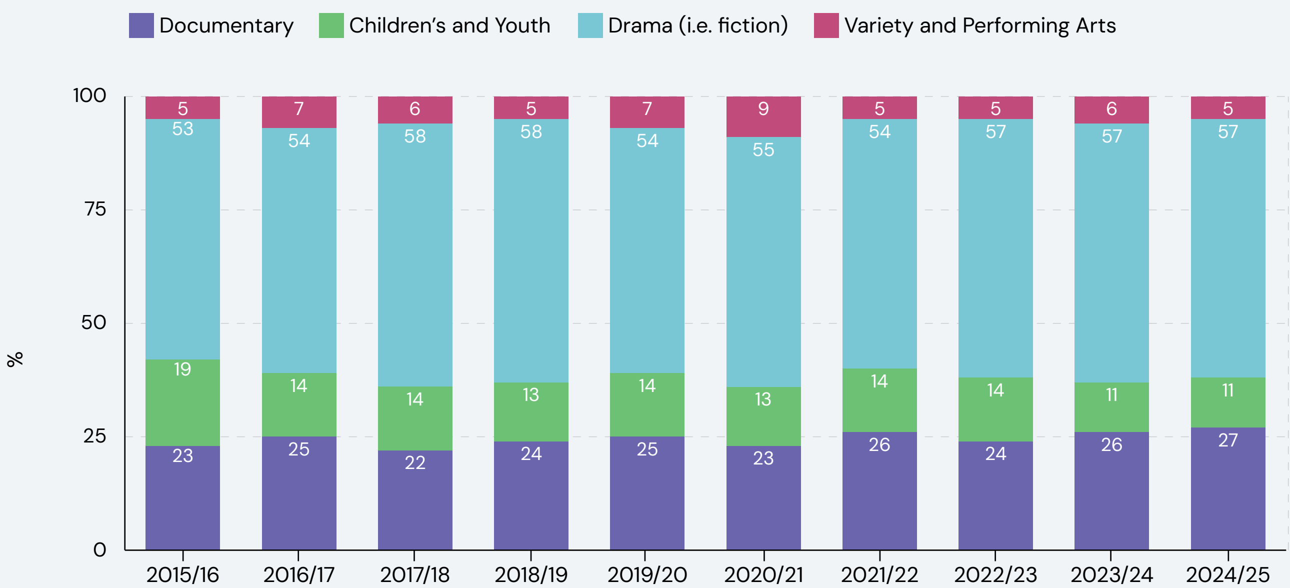
$ MILLIONS	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Documentary	1,041	1,045	831	959	1,051	1,035	1,142	990	1,025	955
Children's and youth	763	688	697	516	547	546	463	404	485	445
Drama (i.e. fiction)	757	728	724	727	760	674	947	908	856	817
Variety and performing arts	398	418	452	393	415	360	317	305	312	362
Total	**2,959**	**2,878**	**2,704**	**2,595**	**2,773**	**2,615**	**2,869**	**2,607**	**2,678**	**2,580**

Source:
CMF.
Note:
Some totals may not sum due to rounding.

Exhibit 2-14 CMF contribution to television production, by category (total volume)



CMF contribution to television production, by category (share of total)

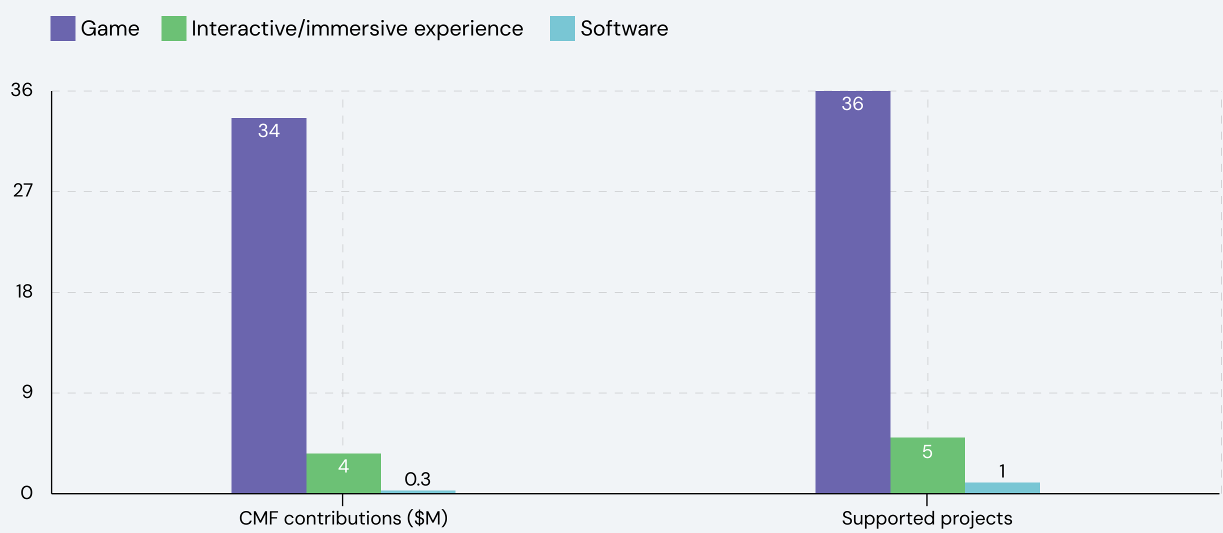


Source:
CMF.
Note:
Some totals may not sum due to rounding.

Box 2 CMF-supported interactive digital media creation

Interactive digital media includes innovative digital media content and software applications supported by the CMF. In 2024/25, the CMF provided $37.5 million in funding for the creation of 42 interactive digital media content assets with total production budgets of $63.9 million.[12]

Box 2 CMF-supported interactive digital media creation, CMF contribution and supported projects, 2024/25



Source:
CMF.
Note:
These figures are not included elsewhere in total numbers or figures in the report.

[12] Statistics may differ from those reported in the CMF Annual Report for two reasons: (i) statistics reported in Profile 2025 include only production-stage funding for IDM content, whereas statistics in the CMF Annual Report may include funding across multiple stages of the IDM lifecycle and (ii) differences in categorization and program inclusion — such as the reporting of some pilot initiatives, select national partnerships, and the classification of certain programs may result in variations in project counts and funding totals.

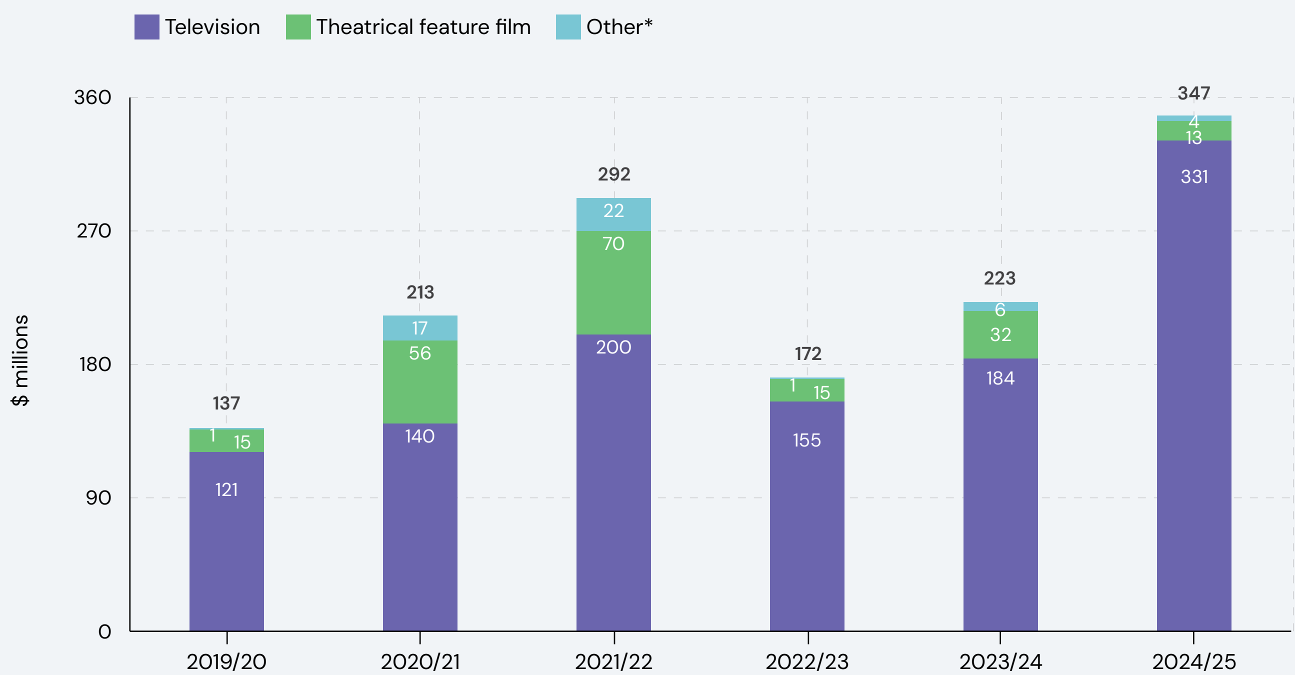
2.7 Indigenous content production

Canadian content production

For the first time, *Profile* also provides information regarding the volume of Indigenous production. In compiling that data, Nordicity has used the definition for Indigenous production developed by the Indigenous Screen Office (ISO), which focuses on financial and creative control of the project by Indigenous persons. Of note, some funding agencies have developed definitions that vary slightly from this definition, but financing from these sources is included in total production volume.

The estimate for 2024/25 indicates the highest level of total volume ($347 million) for Indigenous audiovisual production, since that data was first tracked in 2019/20.

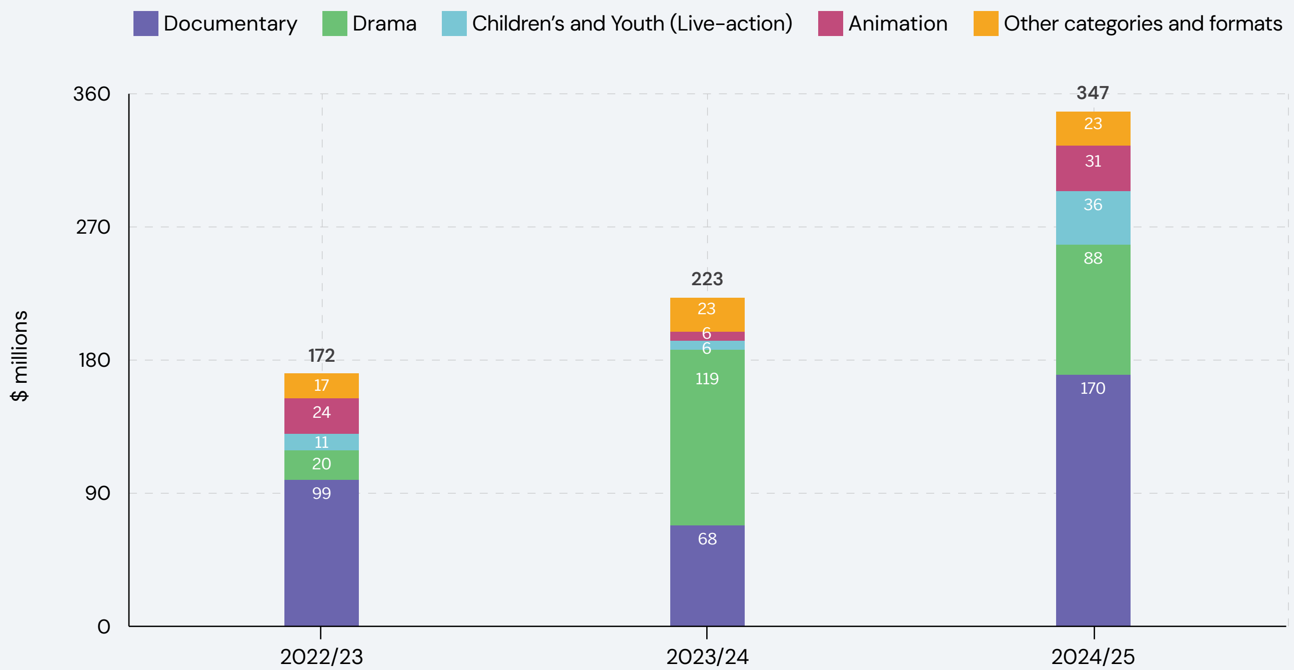
Exhibit 2-15 Volume of Indigenous production



Source:
Estimates based on data from ISO, APTN, CMF, Telefilm Canada and Bell Fund.
Note:
Some totals may not sum due to rounding.
* Online audiovisual content

The programming category with the largest production volume in 2024/25 was documentary ($170 million), followed by drama ($88 million).

Exhibit 2-16 Volume of Indigenous production, by category



Source:
Estimates based on data from ISO, APTN, CMF, Telefilm Canada and Bell Fund.
Note:
Some totals may not sum due to rounding.

By region, Quebec accounted for the largest single share of Indigenous audiovisual production in 2024/25, with $97 million or 28% of the total volume of $347 million.

Exhibit 2-17 Volume of Indigenous production, by category (total volume)

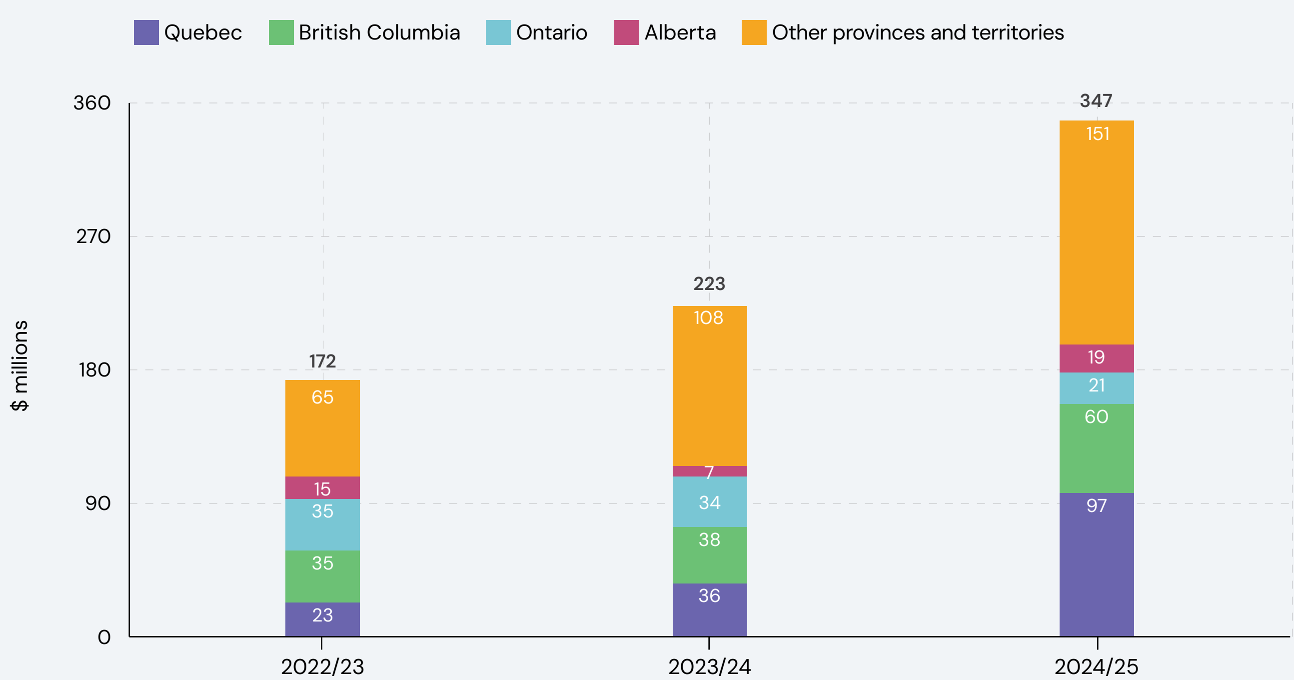
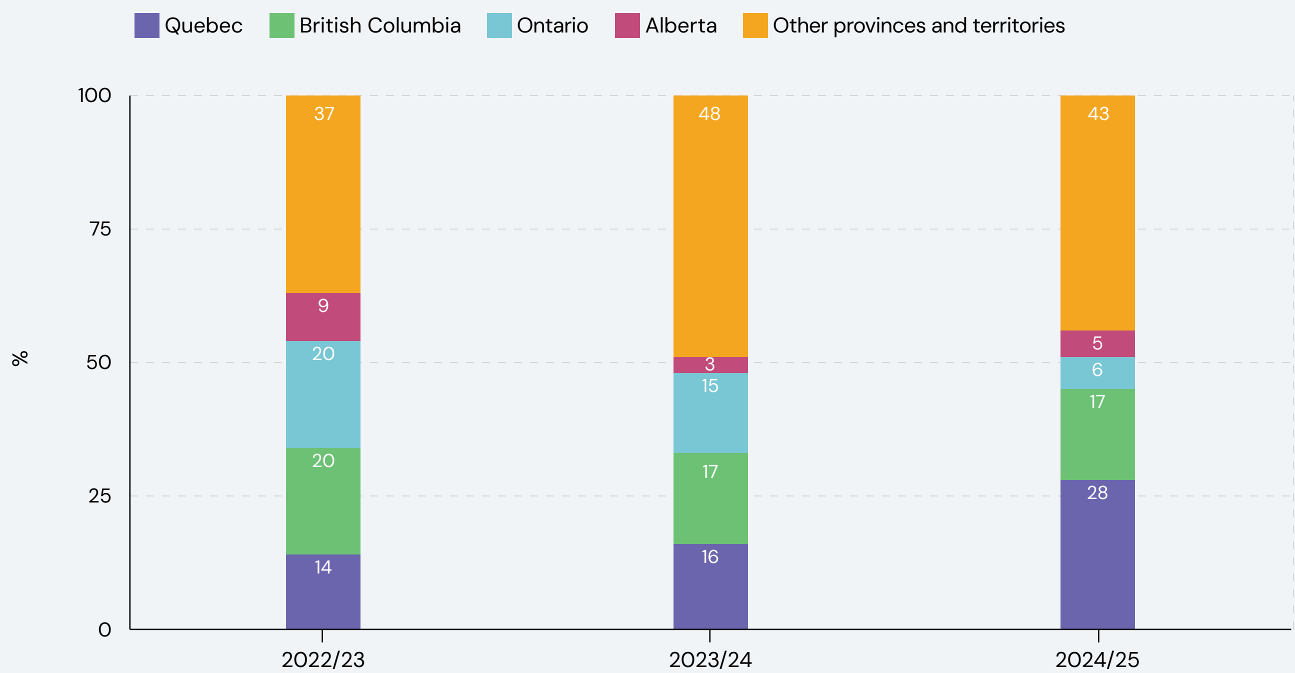


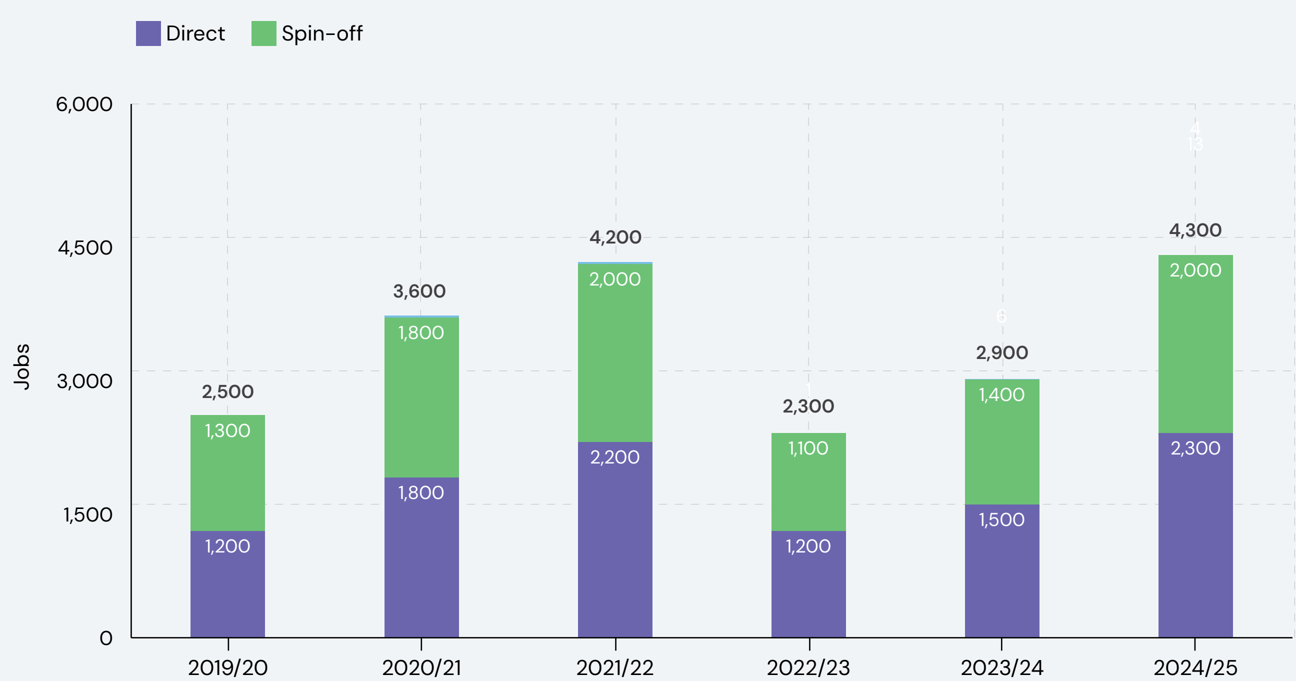
Exhibit 2-17 Volume of Indigenous production, by category (share of total)



Source:
Estimates based on data from ISO, APTN, CMF, Telefilm Canada and Bell Fund.
Note:
Some totals may not sum due to rounding.

Indigenous television and theatrical feature film production generated 4,300 jobs for Canadians in 2024/25, including 2,300 crew jobs (i.e., direct impact employment). It also generated $329 million in labour income and $399 million in GDP for the Canadian economy.

Exhibit 2-18 Number of jobs (i.e. person count) generated by Indigenous film and television



Source:
Estimates based on data from ISO, APTN, CMF, Telefilm Canada and Bell Fund.
Note:
Some totals may not sum due to rounding.

Exhibit 2-19 Economic impact of Indigenous content production, labour income and GDP

LABOUR INCOME ($ MILLIONS)	2023/24	2024/25
Direct	127	198
Spin-off	83	131
Total	**210**	**329**

GDP ($ MILLIONS)	2023/24	2024/25
Direct	132	205
Spin-off	124	194
Total	**256**	**399**

Source:
Estimates based on data from ISO, APTN, CMF, Telefilm Canada and Bell Fund.
Note:
Some totals may not sum due to rounding.

3 Canadian television production

Canadian television production includes the production of television series, mini-series, TV movies, single-episode television programs and television pilots. It consists of productions that are certified as Canadian content by either the Canadian Audio-visual Certification Office (CAVCO) or the Canadian Radio-television and Telecommunications Commission (CRTC).

Television production is carried out across several categories, including fiction (for example drama and comedy), children's and youth, documentary, lifestyle and human interest, and variety and performing arts (VAPA). This segment excludes broadcaster in-house production, such as news, sports and public affairs programs produced by Canadian broadcasters.[13]

Highlights 2024/25

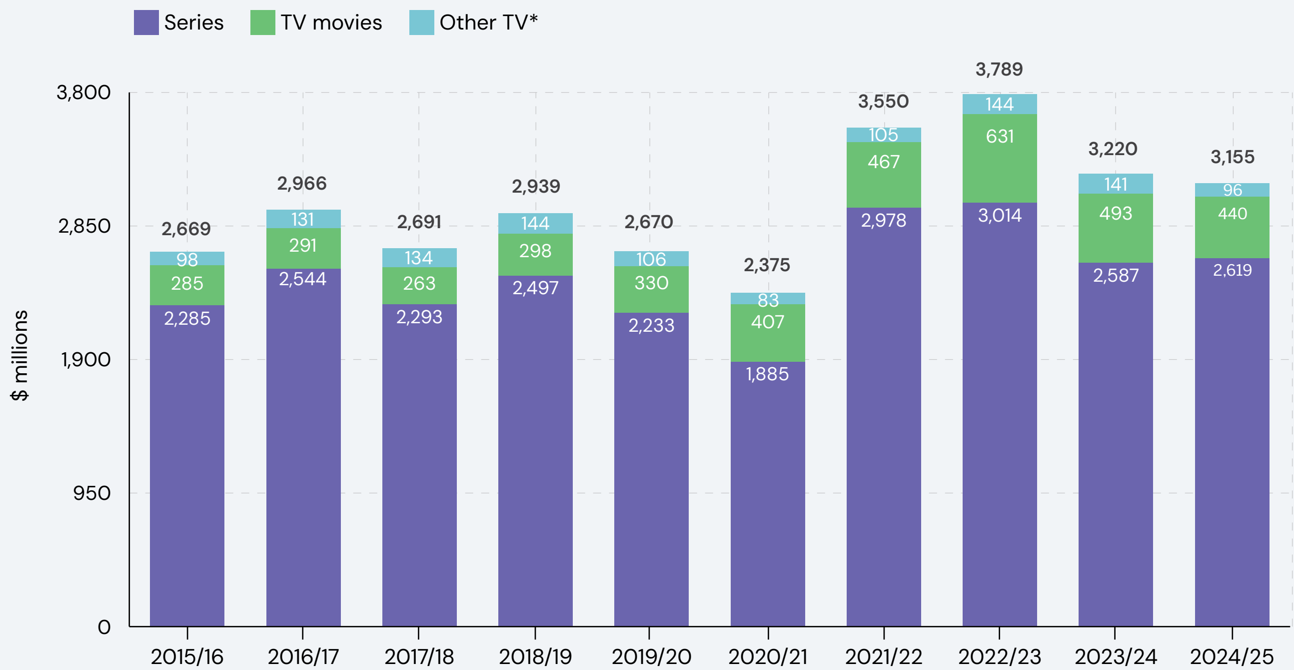
- A 1.2% increase in Canadian television series production helped offset decreases in TV movies and other types of television production, however, there was still an overall decrease of 2.0% in Canadian television production in 2024/25.
- Higher volumes of French-language (2.3%) did not offset the decrease in English-language (3.2%) Canadian television production, contributing to the overall decrease in this segment.
  - Average hourly budgets were higher for English-language productions in all categories, except for variety and performing arts.
  - Conversely, the decrease in the total number of projects was greater in English-language production, to the point where totals are now almost comparable between the two markets (548 in English versus 506 in French).
- The top three provinces for Canadian television production remained Ontario, Quebec and British Columbia, with production volumes exceeding $1 billion in both Ontario and Quebec, and approaching $450 million in British Columbia.
- Fiction production decreased in English (1.3%) but increased in French (12.6%). Children's and youth television production also experienced a rebound of 3.0% in 2024/25, although total volumes remained below levels observed in prior years. Documentary production declined in both languages, by approximately 8.5%. Lifestyle and human interest differed in that production increased in one language (French) while decreasing in the other (English), while variety and performing arts decreased in both languages
- Fiction continued to hold the largest share of production in both English- and French-language markets. Its share remained significantly higher in English-language production (62% compared to 39%). Conversely, French-language production accounted for a much larger share in other genres, notably lifestyle and human interest (27% compared to 10%) and variety and performing arts (14% compared to 1%).
- After falling to a 10-year low of $167 million in 2023/24, Canadian animation television production rebounded by 43.1% to $239 million in 2024/25, although it remained well below production levels observed in earlier years.

[13] Statistics for the volume of broadcaster in-house production can be found in Section 7 of this report.

3.1 Types

Canadian television production

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



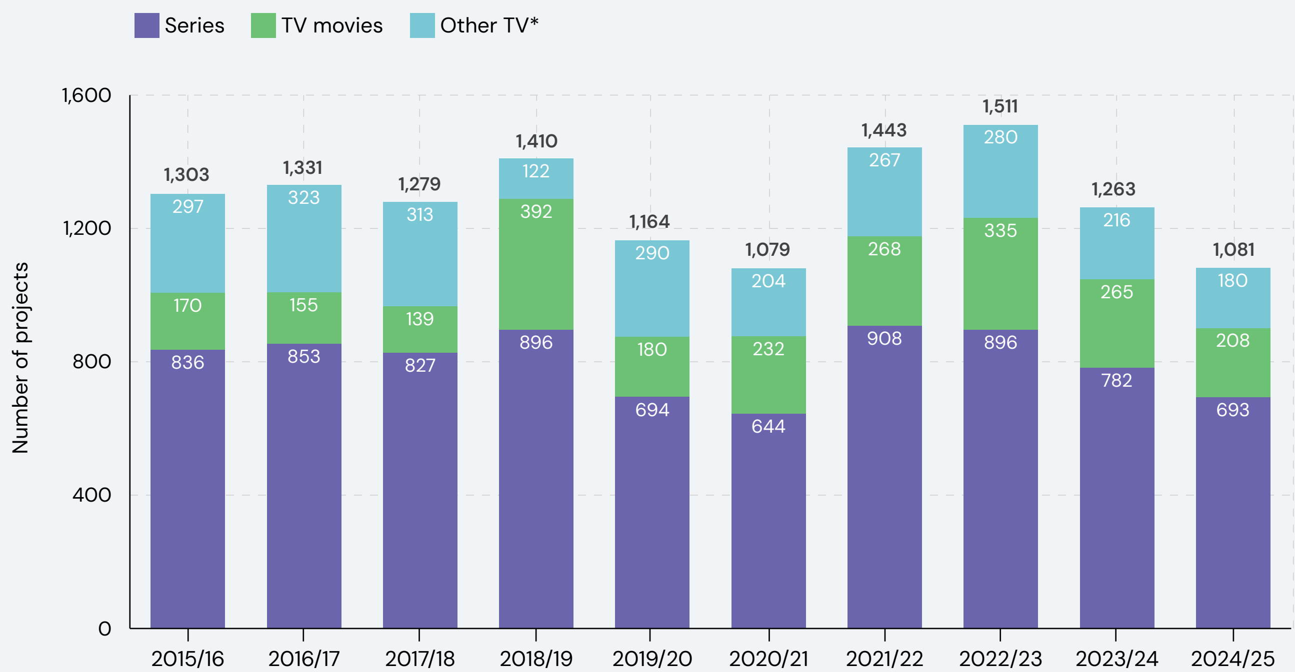
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Other TV category includes single-episode television programming and television pilots.

Volume of Canadian television production, by type, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Series	2,587	32	1.2
TV movies	493	-53	-10.7
Other TV**	141	-45	-31.7
Total	**3,220**	**-65**	**-2**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Other TV category includes single-episode television programming and television pilots.

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

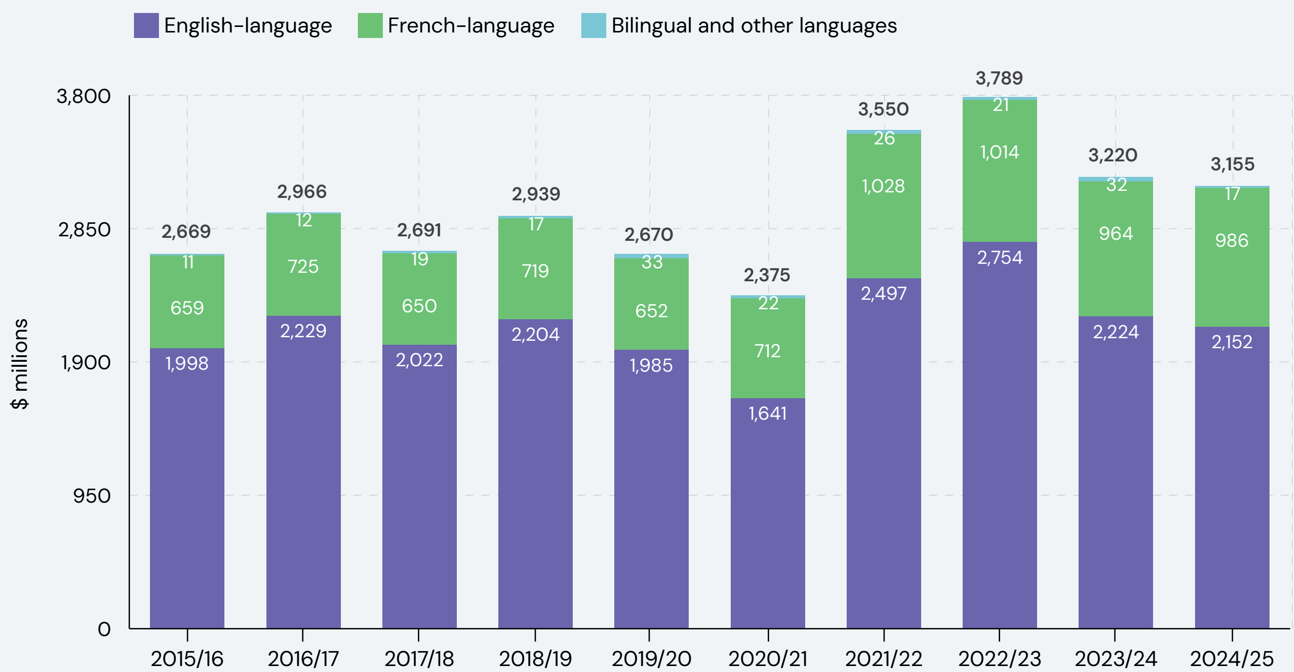


Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Other TV category includes single-episode television programming and television pilots.

3.2 Language

Canadian television production

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



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.

Volume of Canadian television production, by language, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
English-language	2,224	-72	-3.2
French-language	964	22	2.3
Bilingual and other languages	32	-15	-47.4
Total	**3,220**	**-65**	**-2**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.

Exhibit 3-4 Number of Canadian television projects, by language

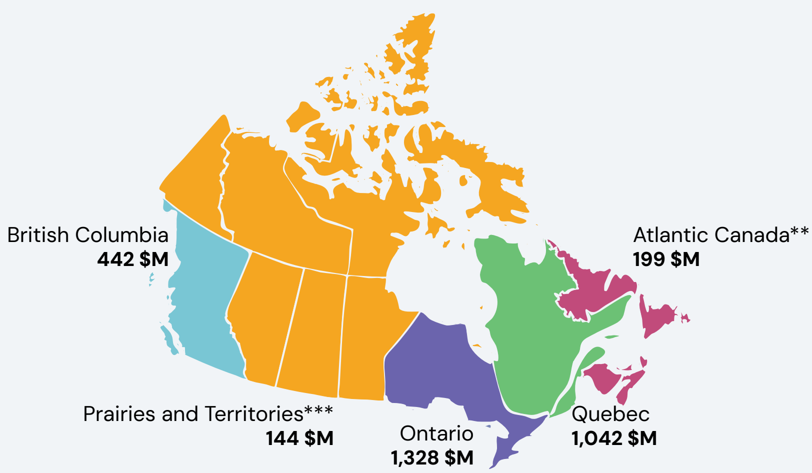
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
English-language	705	702	697	761	645	575	789	869	698	548
French-language	583	615	567	623	493	481	616	614	530	506
Bilingual and other languages	15	14	15	25	26	23	37	29	34	21
Total	**1,303**	**1,331**	**1,279**	**1,409**	**1,164**	**1,079**	**1,442**	**1,512**	**1,262**	**1,075**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.

3.3 Region

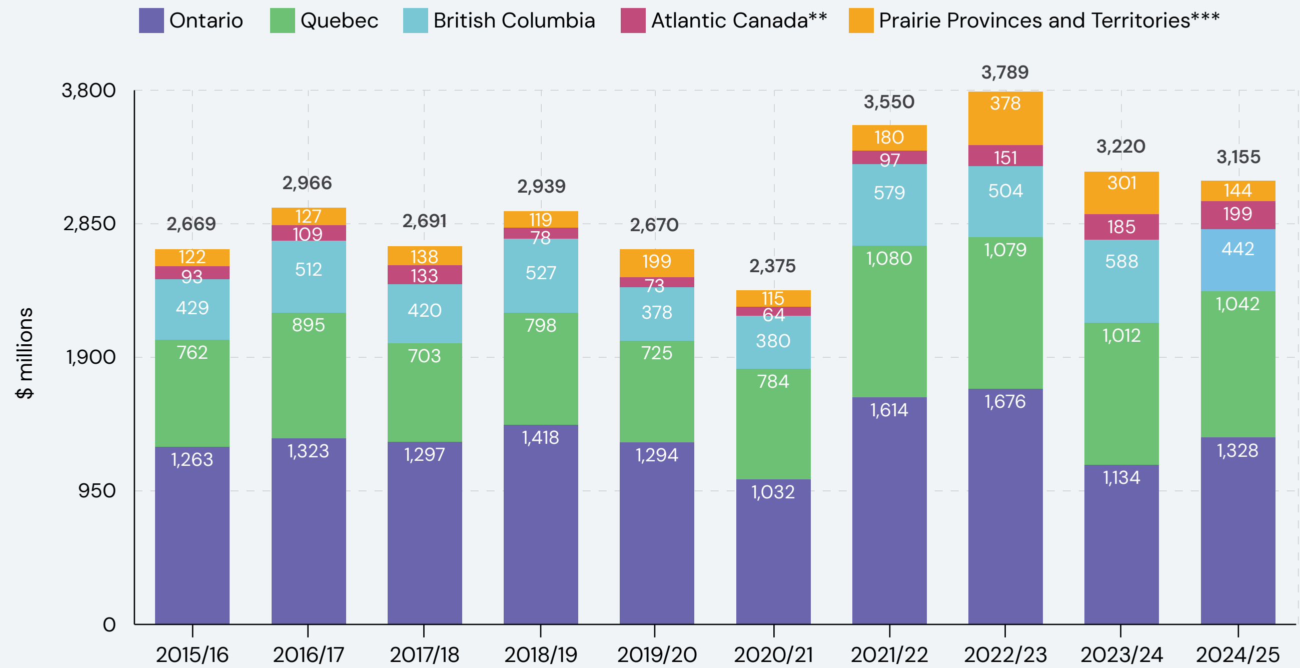
Canadian television production

Exhibit 3-5 Volume of Canadian television production, by region*, 2024/2025

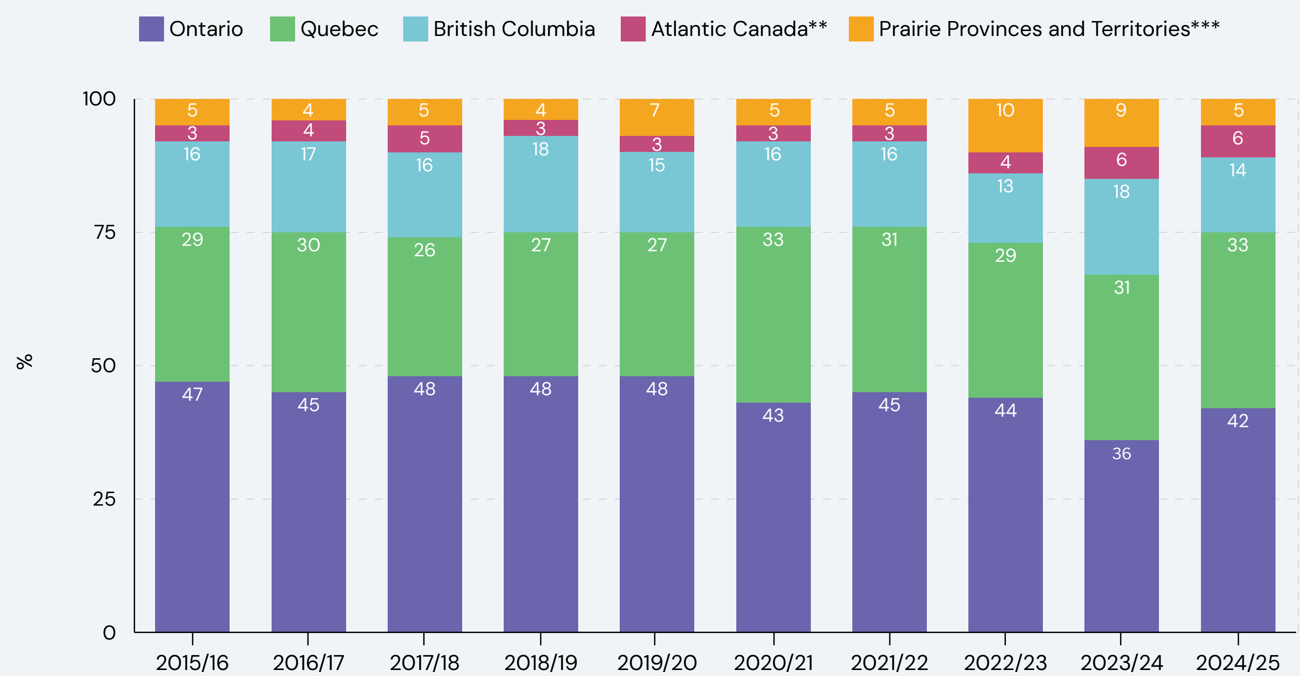


Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics. Statistics published by provincial funding agencies may differ from those in *Profile 2025*.
Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. Please see Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the re-coding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Exhibit 3-6 Volume of Canadian television production, by region (total volume)*



Volume of Canadian television production, by region (share of total)*



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics. Statistics published by provincial funding agencies may differ from those in *Profile 2025*.
Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. See Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the recoding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Volume of Canadian television production, by region*, annual growth 2024/2025

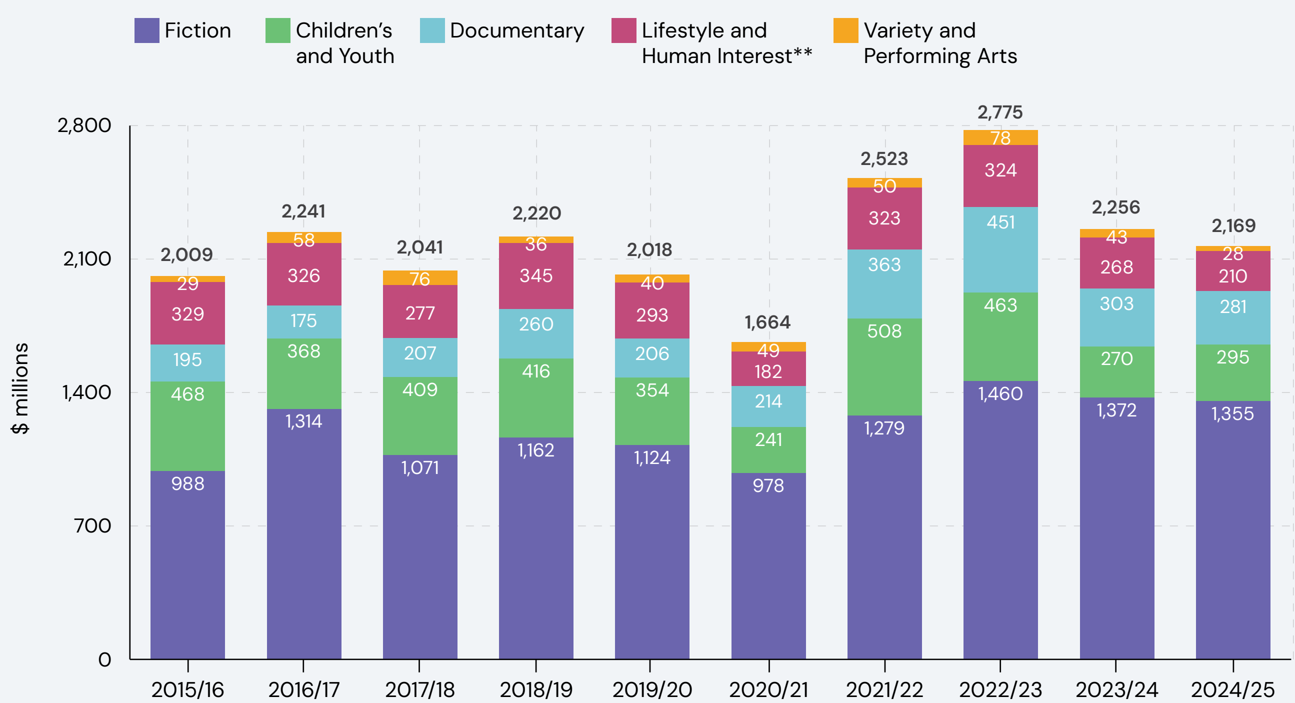
	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Ontario	1,134	194	17.1
Quebec	1,012	29	2.9
British Columbia	588	-145	-24.7
Atlantic Canada**	185	14	7.7
Prairie Provinces and Territories***	301	-157	-52.2
Total	**3,220**	**-65**	**-2**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics. Statistics published by provincial funding agencies may differ from those in *Profile 2025*.
Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. See Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the recoding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick, and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

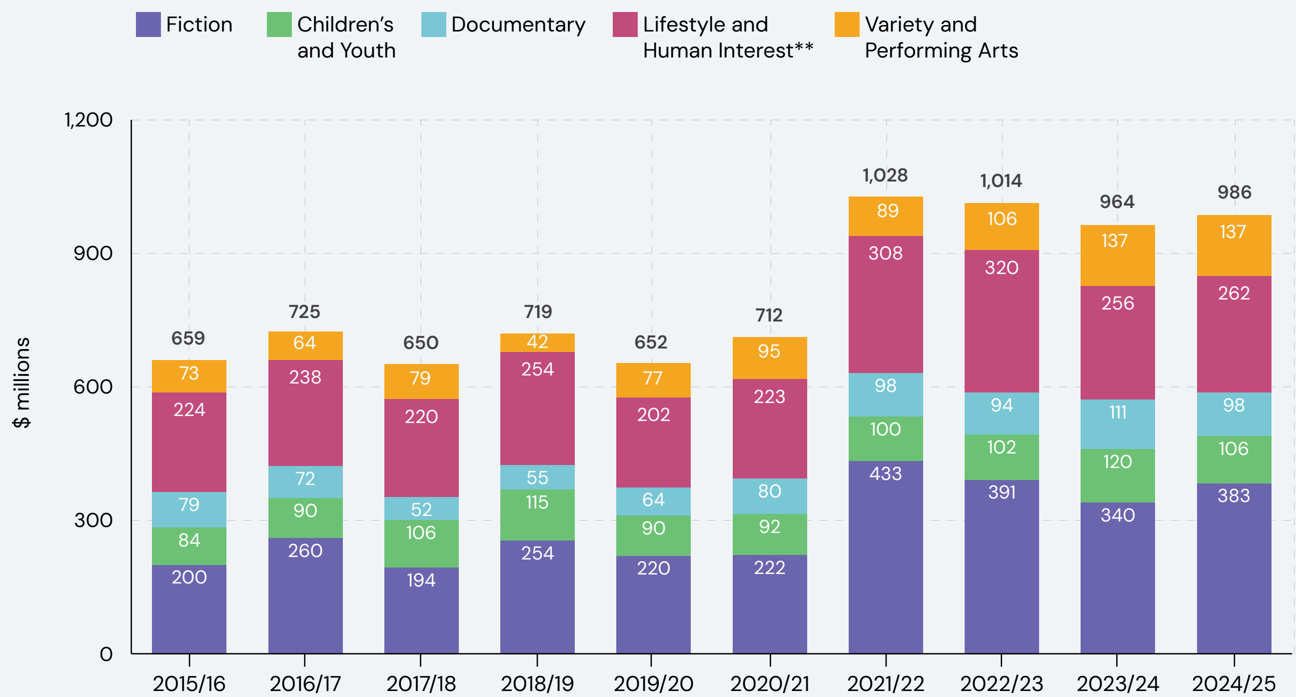
3.4 Program categories

Canadian television production

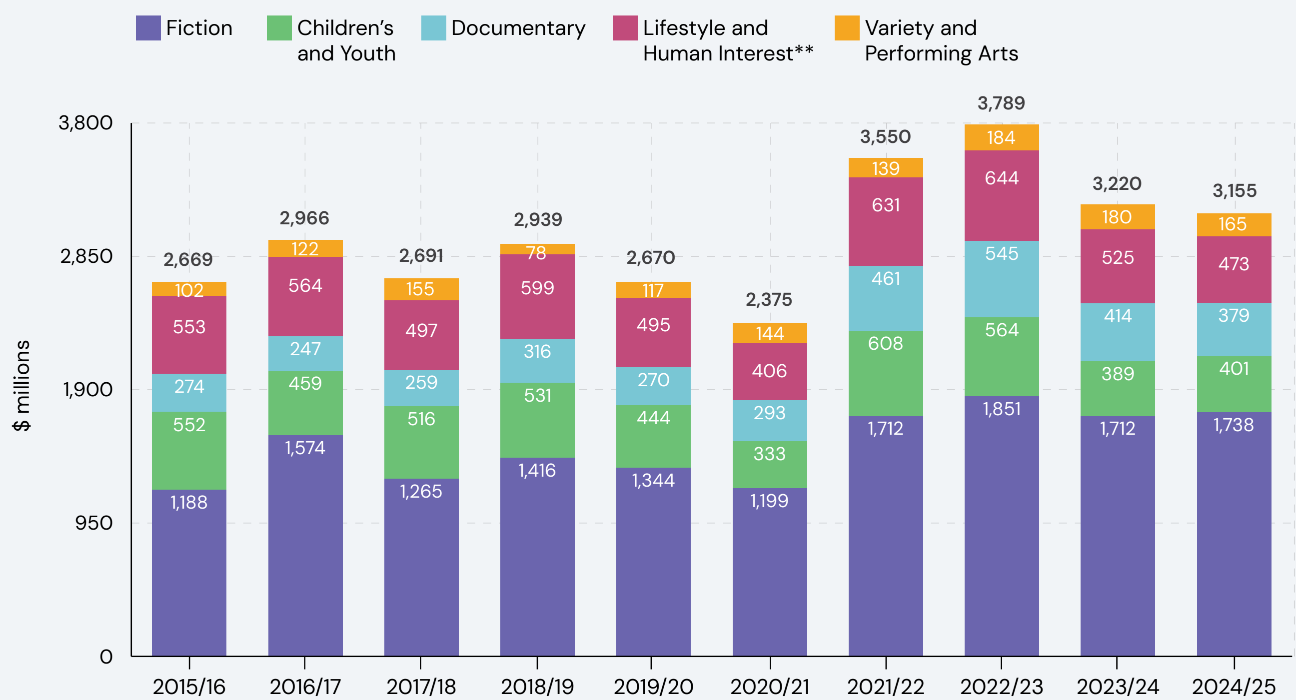
Exhibit 3-7 Volume of Canadian television production, by category and by language (English-langauge)



Volume of Canadian television production, by category and by language (French-langauge)

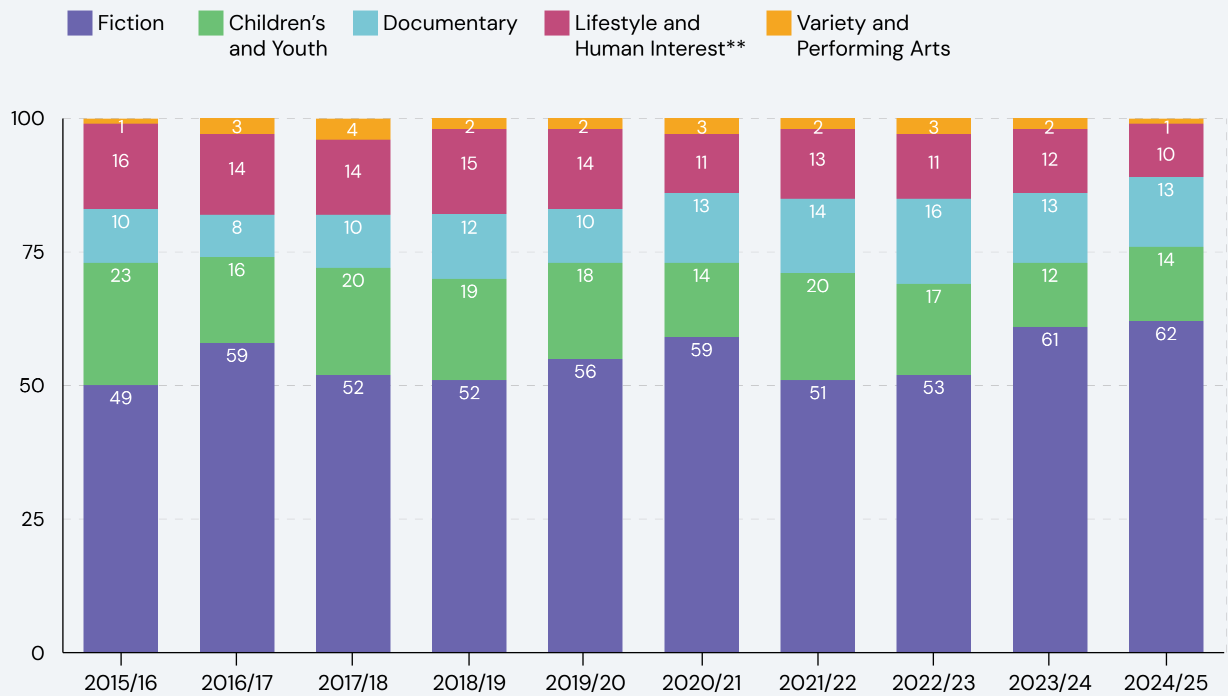


Volume of Canadian television production, by category and by language (all langauges)



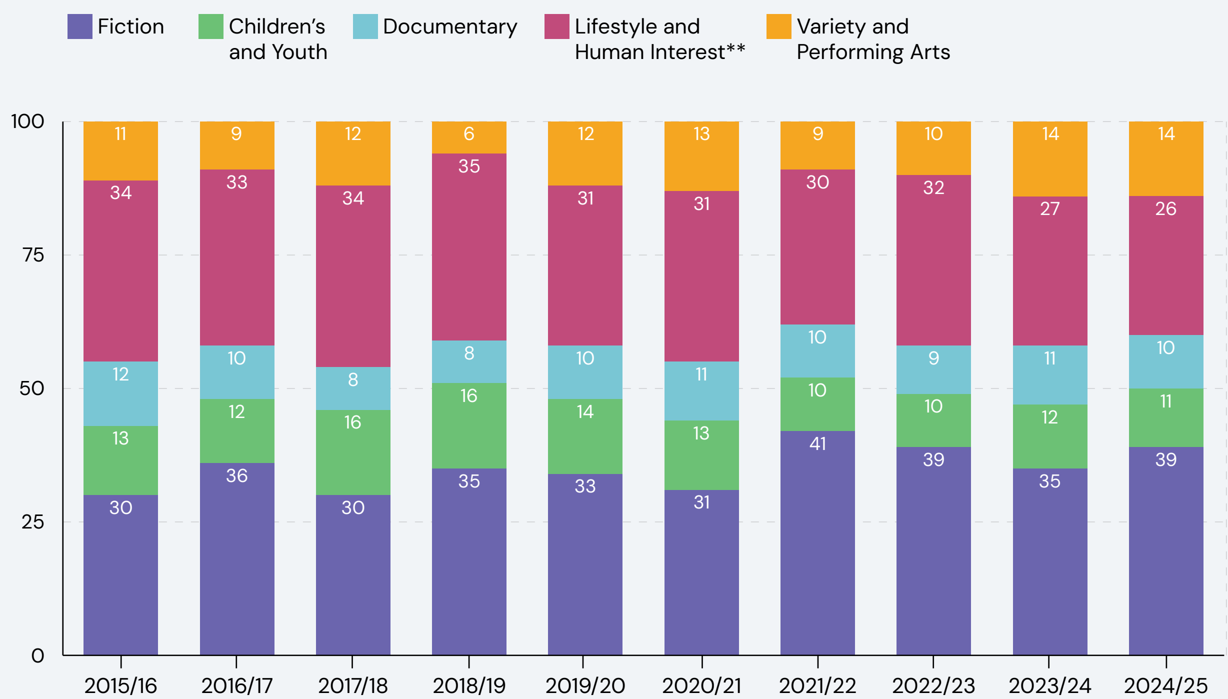
Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2015/16 and 2024/25 and cannot be reported on separately due to confidentiality issues arising from low production volume.
** Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

Exhibit 3-8 Shares of total volume of Canadian television production, by category and by language (English language)



	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Variety and Performing Arts	1	3	4	2	2	3	2	3	2	1
Lifestyle and Human Interest**	16	14	14	15	14	11	13	11	12	10
Documentary	10	8	10	12	10	13	14	16	13	13
Children's and Youth	23	16	20	19	18	14	20	17	12	14
Fiction	49	59	52	52	56	59	51	53	61	62

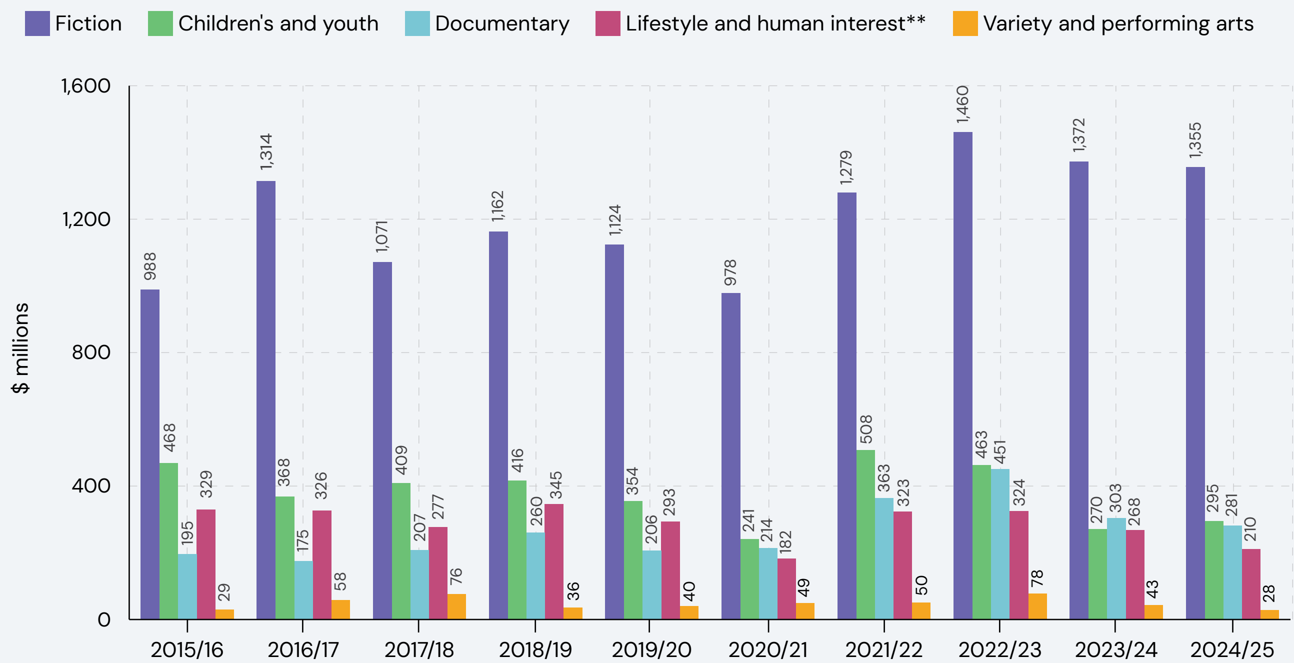
Shares of total volume of Canadian television production, by category and by language (French language)



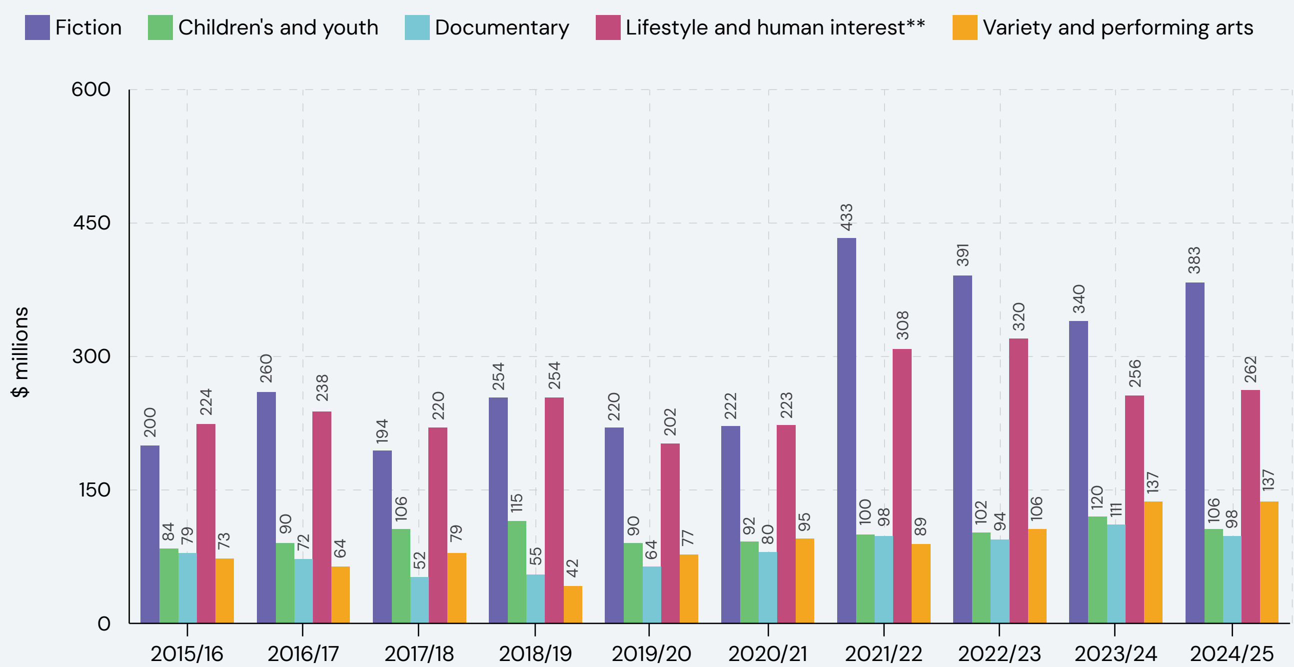
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Variety and Performing Arts	11	9	12	6	12	13	9	10	14	14
Lifestyle and Human Interest**	34	33	34	35	31	31	30	32	27	26
Documentary	12	10	8	8	10	11	10	9	11	10
Children's and Youth	13	12	16	16	14	13	10	10	12	11
Fiction	30	36	30	35	33	31	41	39	35	39

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2015/16 and 2024/25 and cannot be reported on separately due to confidentiality issues arising from low production volume.
** Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

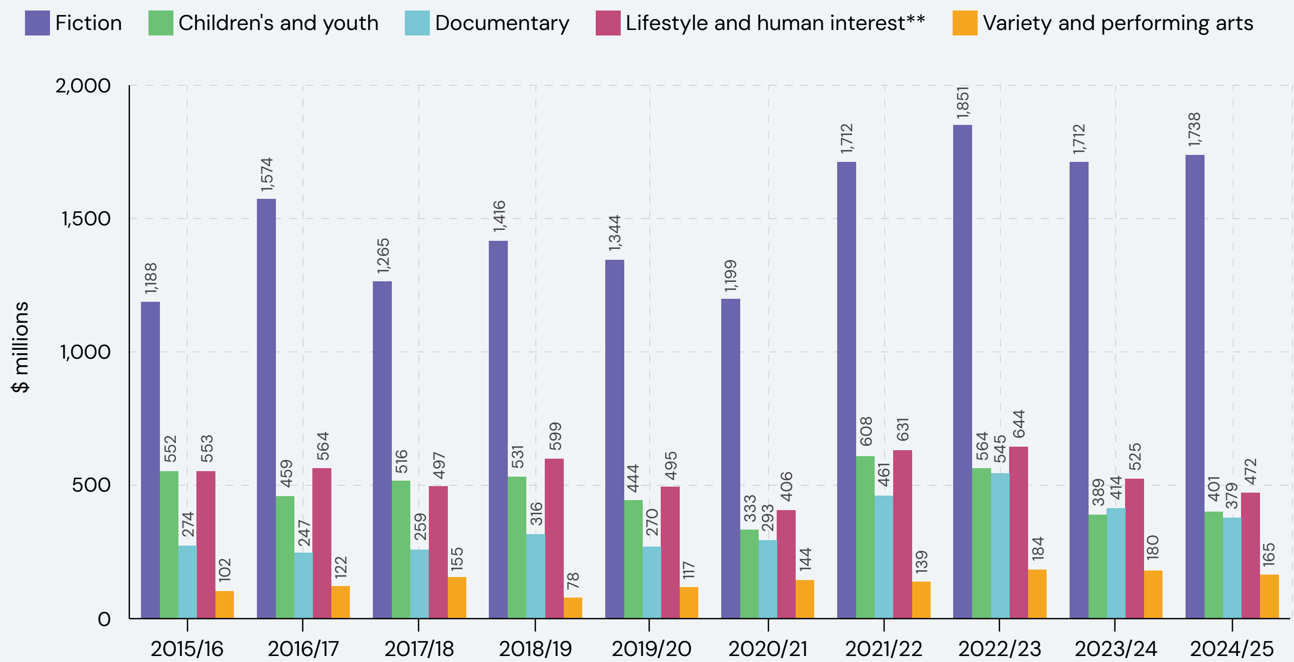
Exhibit 3-9 Volume of Canadian television production, by category and language (English-language)



Volume of Canadian television production, by category and language (French-language)

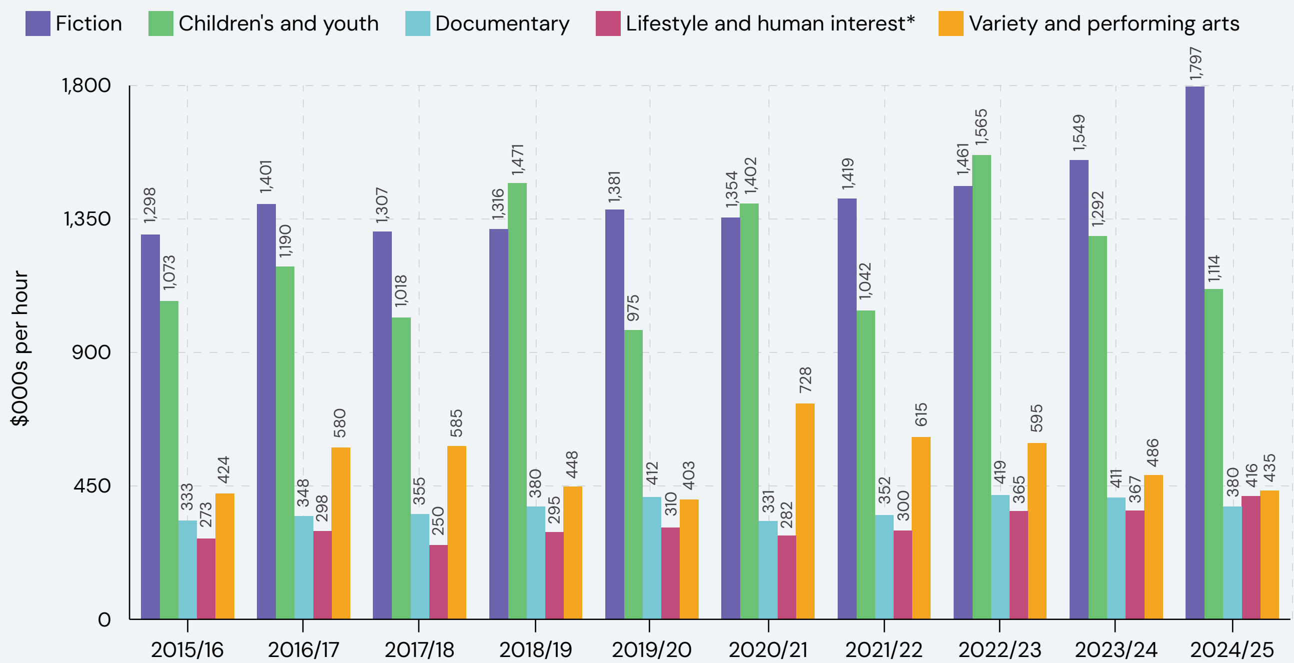


Volume of Canadian television production, by category and language (all languages)

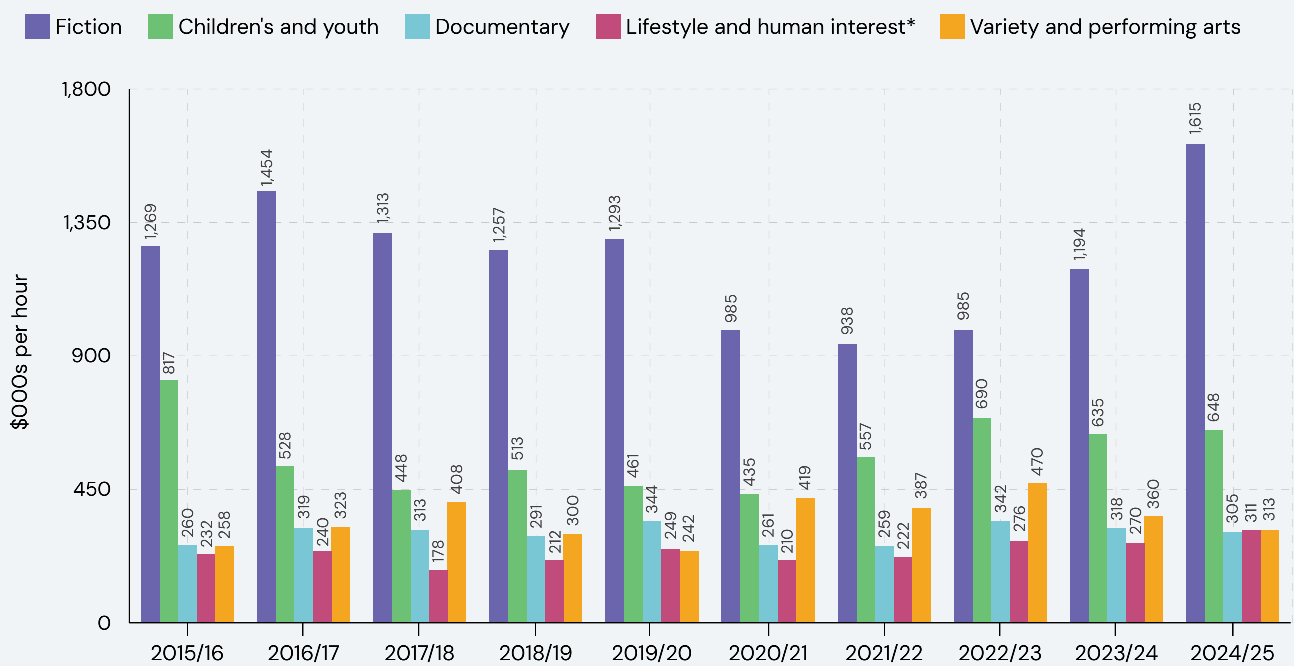


Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2015/16 and 2024/25 and cannot be reported on separately due to confidentiality issues arising from low production volume.
** Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

Exhibit 3-10 a) Average budgets, by category (English-language production) (average)

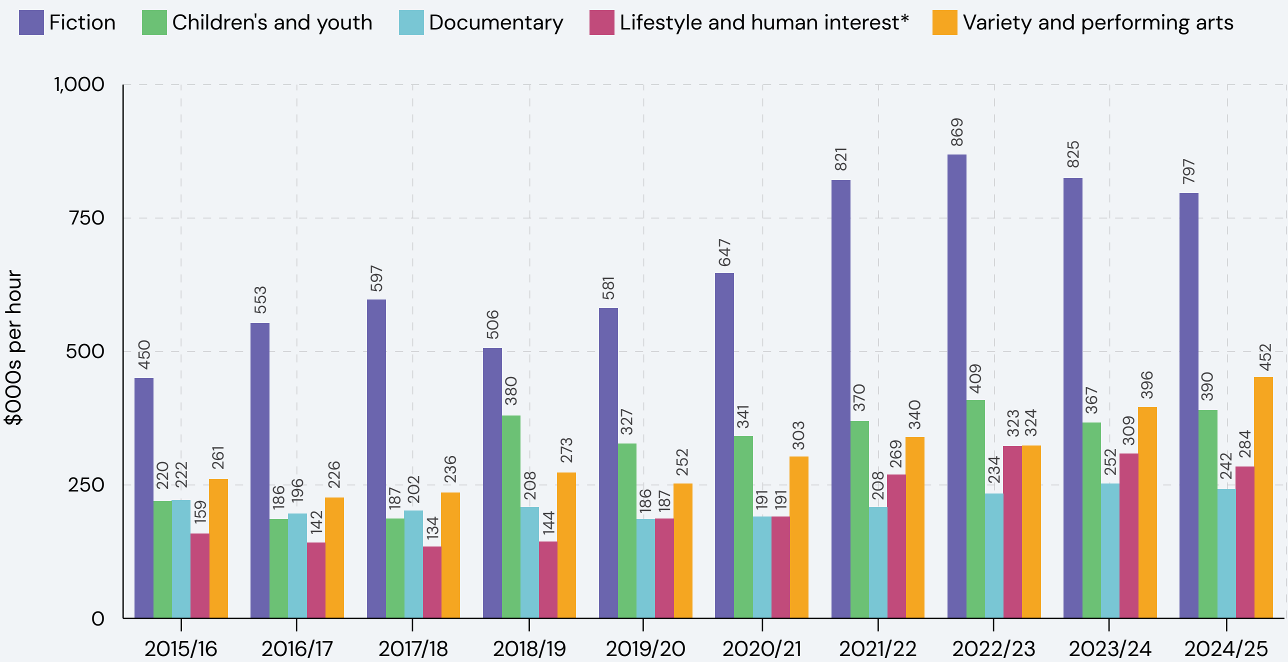


Average budgets, by category (English-language production) (median)

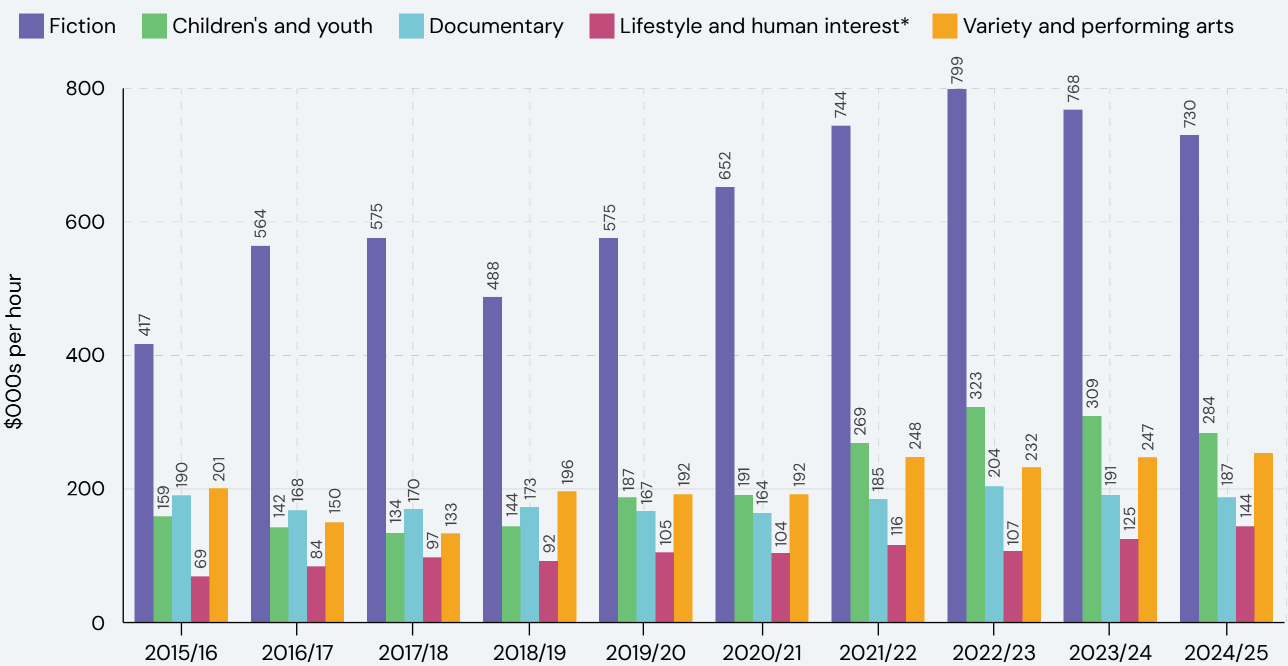


Source:
Estimates based on data collected from CAVCO.
Note:
Excludes an estimate (as used in other exhibits) of CRTC-certified television production. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

Exhibit 3-10 b) Average budgets, by category (French-language production) (average)



Average budgets, by category (French-language production) (median $000s per hour)

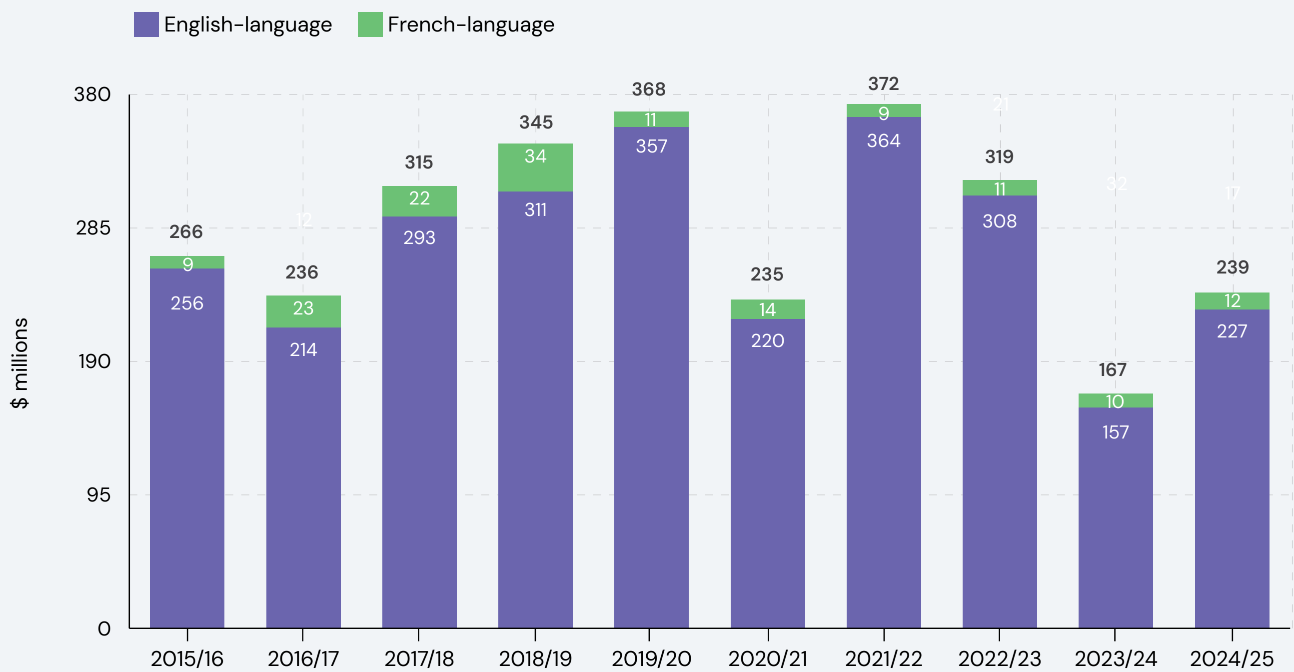


Source:
Estimates based on data collected from CAVCO.
Note:
Excludes an estimate (as used in other exhibits) of CRTC-certified television production. Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.

3.5 Animation

Canadian television production

Exhibit 3-11 Volume of Canadian animation television production, by language



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2015/16 and 2024/25 and cannot be reported on separately due to confidentiality issues arising from low production volume.

Volume of Canadian animation television production, by language, annual growth 2024/2025

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
English-language	157	70	44.6
French-language	10	2	20
Total	**167**	**72**	**43.1**

Source:
Source: Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production; see Notes on methodology for more information.
Excludes 'online-first' audiovisual production; see Box 1 for definitions and statistics.
* Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of English-language television production between 2015/16 and 2024/25 and cannot be reported on separately due to confidentiality issues arising from low production volume.

In 2024/25, animation production accounted for 59.6% of total children's and youth television production. This was up from 42.9% in 2023/24.

Exhibit 3-12 Volume of Canadian children's and youth television production, by language and category*

2023/24 PRODUCTION VOLUME ($ MILLIONS)	ANIMATION	LIVE ACTION	TOTAL
English-language**	157	113	270
French-language	10	110	120
Total	**167**	**222**	**389**
2024/25 PRODUCTION VOLUME ($ MILLIONS)	ANIMATION	LIVE ACTION	TOTAL
English-language**	227	68	295
French-language	12	94	106
Total	**239**	**162**	**401**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals do not sum due to rounding. Data includes an estimate of CRTC-certified television production.
* Due to data confidentiality, statistics can only be presented for television production and exclude theatrical feature film production.
** Includes data for projects produced in bilingual format and non-official languages, which comprised less than one percent of the total volume of Canadian content production in 2023/24 and 2024/25, and cannot be reported separately due to confidentiality issues arising from low production volume.

3.6 Canadian Content Points

Canadian television production

Both CAVCO and the CRTC use points-based certification frameworks to determine whether audiovisual productions qualify as "Canadian". These certification frameworks are essential for Canadian broadcasters to demonstrate compliance with their regulatory requirements, including Canadian programming expenditures (CPE).

CAVCO uses a point scale, which assigns points to key creative production roles occupied by Canadians to determine (in conjunction with other eligibility criteria) if a film or television program is eligible to access the Canadian Film or Video Production Tax Credit (CPTC). Other funding mechanisms such as Telefilm Canada, various Certified Independent Production Funds (CIPFs) and the CMF use the same scale. [14]

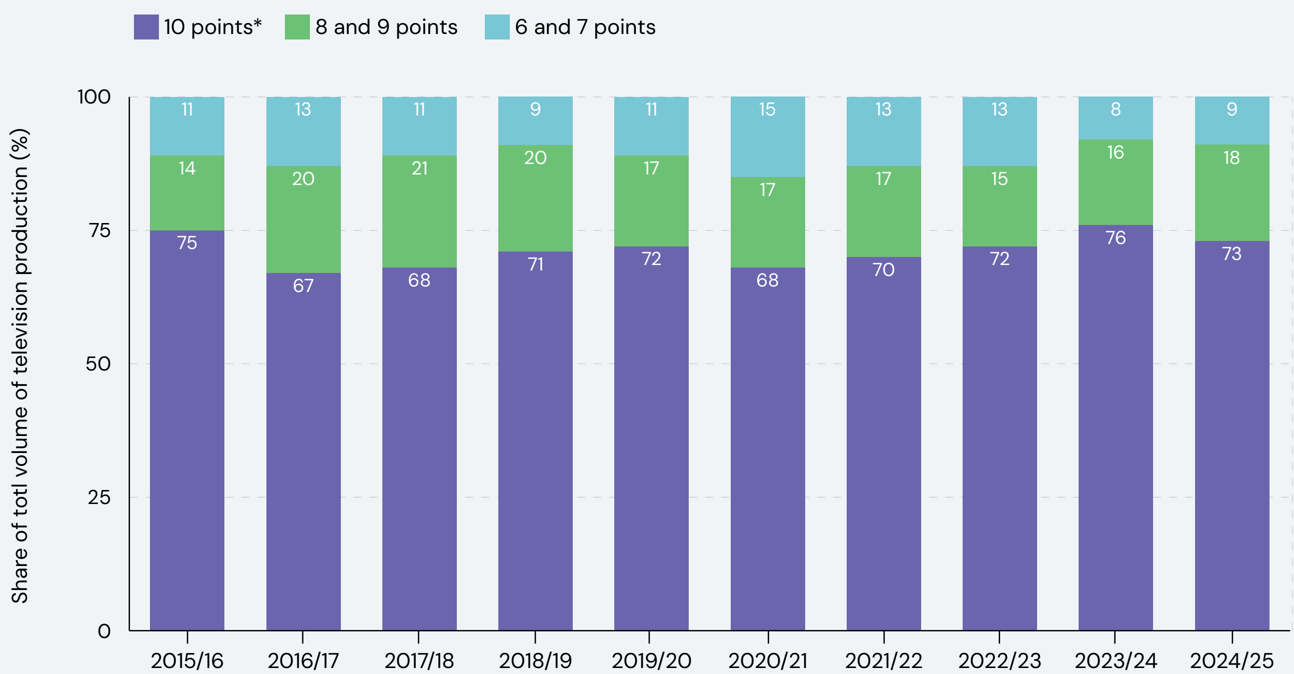
To be certified as Canadian content, a film or television program (other than an audiovisual treaty coproduction) must obtain a minimum of six points, up to a maximum of 10 points.[15] The significant majority of Canadian television programs obtain the maximum 10 Canadian content points and this share has remained relatively stable over the past decade. In 2023/24, 10-point production reached a 10-year high in terms of share at 77% of total Canadian television production, before dipping to 73% in 2024/25.

[14] For more information on the Canadian content point scale and all other CPTC requirements, please see CAVCO's CPTC Application Guidelines https://www.canada.ca/en/canadian-heritage/services/funding/cavco-tax-credits/canadian-film-video-production.
[15] A documentary project can receive certification even if it obtains fewer than six points; however, all the key creative positions must be occupied by Canadians.

On November 18, 2025, the CRTC announced a new definition of Canadian content for broadcasting regulation, including a new Canadian content points system. The CRTC's new definition had not yet been implemented at the time of writing. [16] Among other things, the CRTC's modernized Canadian content points system will award up to 14 points across 11 different key creative roles for live action productions and 15 points across 12 different key creative roles for animation productions. The CRTC has also introduced bonus points for "Canadian key creative elements", awarding one additional point each for the use of identifiable Canadian characters and settings, audiovisual works based on Canadian written works, and where more than 50% of the musical selections in the audiovisual work are Canadian. [17]

For clarity, the CRTC's new certification framework is for the purposes of meeting regulatory obligations as set out by the Commission and does not alter the existing CAVCO point system. CAVCO uses the points system specifically for the purpose of qualifying production for the CPTC. Other funding bodies, such as the CMF and Telefilm Canada, also require productions to meet minimum points for CAVCO/CPTC certification, before receiving direct funding.

Exhibit 3-13 Television production by Canadian content points (excludes audiovisual treaty coproduction)



Source:
Estimates based on data collected from CAVCO.
Note:
*Includes all productions (other than audiovisual treaty coproductions) for which Canadians occupied all of the key creative positions as defined by CAVCO, even if not all key creative point positions were occupied. For example, a television program with only one lead performer would receive 9 out of 9 points, rather than 10 out of 10 points. A similar mapping of points has been done to give all productions a score out of 10 points for the purposes of this exhibit. For example, a television program that receives 7 out of 9 points would be represented as an 8-out-of-10-point production.

[16] CRTC (2025) Broadcasting Regulatory Policy CRTC 2025-299, November 18, 2025.
[17] Ibid.

4 Canadian theatrical feature film production

The Canadian theatrical feature film segment produces feature-length films intended for primary release in movie theatres.[18] Recent examples of notable Canadian theatrical feature films filmed during 2024/25 include *Blood Lines*, *Dinner with Friends*, *Universal Language* and *Deux femmes en or*.

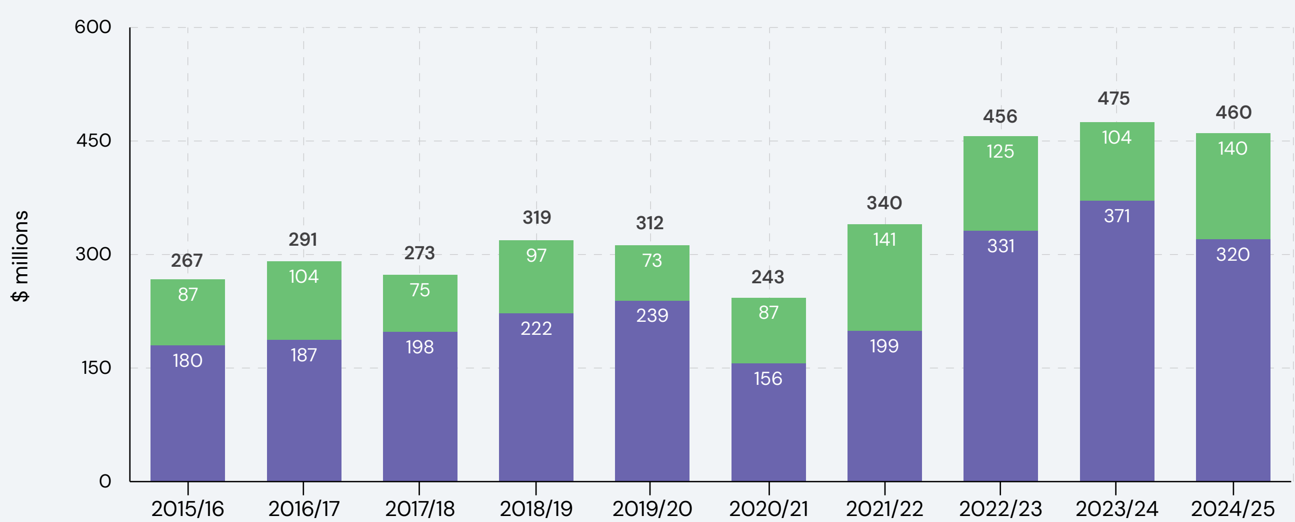
Highlights 2024/25

- Overall, the volume of production declined by 3.2% from $475 million in 2023/24 to $460 million in 2024/25.
  - French-language production increased by 35% to $140 million, while English-language production decreased by 13.8% to $320 million.
  - Of note, production volume can fluctuate from year to year depending on the timing, number and scale of projects. The 35% increase in French-language production reflects a rebound from a low level in the previous year and is consistent with historical ranges of production activity.
- The total number of feature films produced declined from 146 to 132, a 9.6% decrease.
- Ontario-based producers accounted for the largest share (52%) of film production in 2024/25, with $238 million in production volume, followed by Quebec ($172 million), British Columbia ($34 million), Atlantic Canada ($11 million) and the Prairie Provinces and Territories ($5 million).
- Feature film production continued to grow in Ontario (20.4%) and Quebec (7.9%), while falling in all other provinces.
- The share of films with budgets between $2.5 million and $5 million increased significantly, rising from 23% of all films in 2023/24 to 32% in 2024/25.
- The median budget for fictional feature films also increased, from $1.9 million to $2.3 million.

4.1 Language

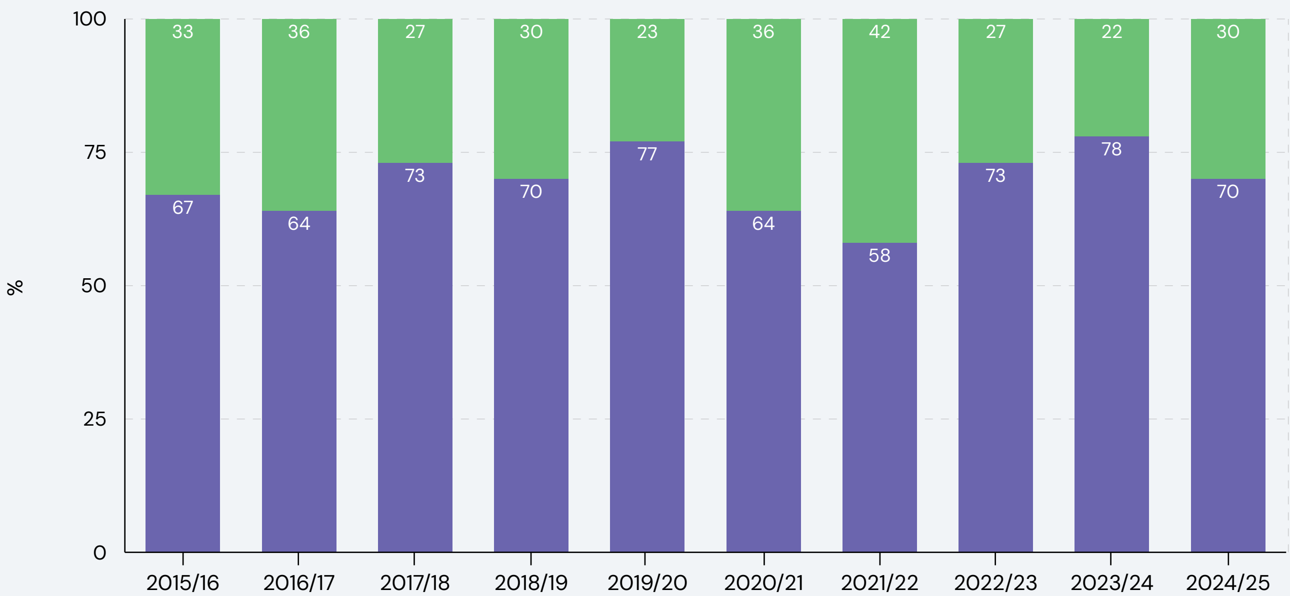
Canadian theatrical feature film production

Exhibit 4-1 Canadian theatrical feature film production, production volume and share, by language (total volume)



[18] For this report, the feature film category includes all films with a running time of 75 minutes or longer. Theatrical feature films are financed for initial release in movie theatres.

Canadian theatrical feature film production, production volume and share, by language (share of total)



Source:
Estimates based on data collected from CAVCO.
Note:
Figures may differ from those published by Telefilm Canada due to differences in accounting and coverage of Telefilm Canada production funding.
* Due to the very low number of projects produced in bilingual format and non-official languages, the data for this category was combined with the data for the English-language market for 2016/17 to 2023/24, and with the French-language market for 2015/16.

Volume of Canadian theatrical feature film production, by language, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
English-language*	371	-51	-13.8
French-language	104	36	35
Total	**475**	**-15**	**-3.2**

Source:
Estimates based on data collected from CAVCO.
Note:
Figures may differ from those published by Telefilm Canada due to differences in accounting and coverage of Telefilm Canada production funding.
* Due to the very low number of projects produced in bilingual format and non-official languages, the data for this category was combined with the data for the English-language market for 2016/17 to 2023/24, and with the French-language market for 2015/16.

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

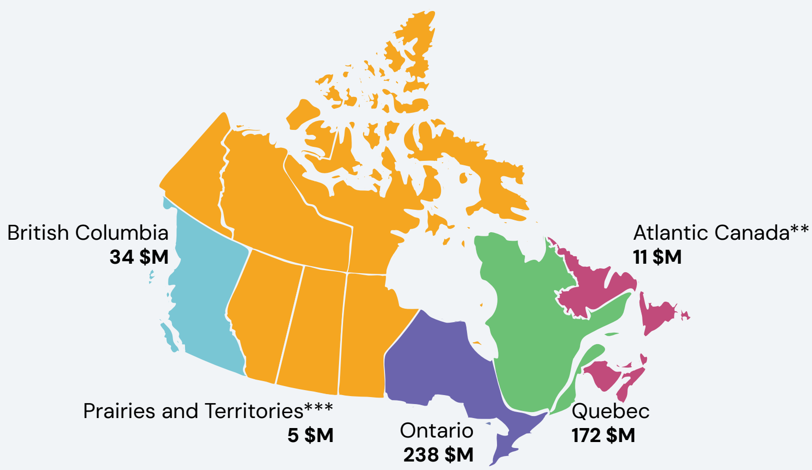
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
French-language*	41	38	42	40	40	27	51	48	35	53
English-language/ Bilingual/Other*	95	84	81	82	108	47	98	110	112	79
Total	**136**	**122**	**123**	**122**	**148**	**74**	**148**	**158**	**146**	**132**

Source:
Estimates based on data collected from CAVCO.
Note:
*Due to the very low number of projects produced in bilingual format and non-official languages, the data for this category was combined with the data for the English-language market for 2016/17 to 2024/25, and with the French-language market for 2015/16.

4.2 Region

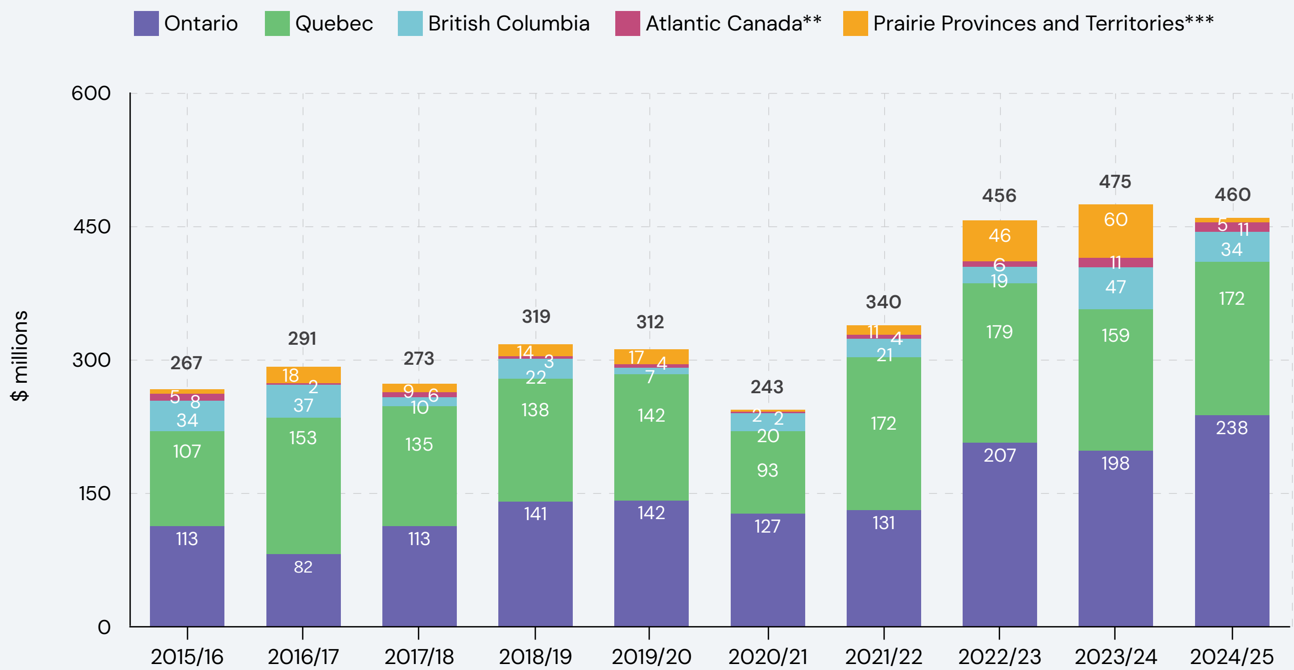
Canadian theatrical feature film production

Exhibit 4-3 Volume of Canadian theatrical feature film production, by region*, 2024/25



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2023*. Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. See Notes on methodology for additional information. Historical figures for certain provinces/territories have been revised due to the recoding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Exhibit 4-4 a) Volume of Canadian theatrical feature film production, by region*



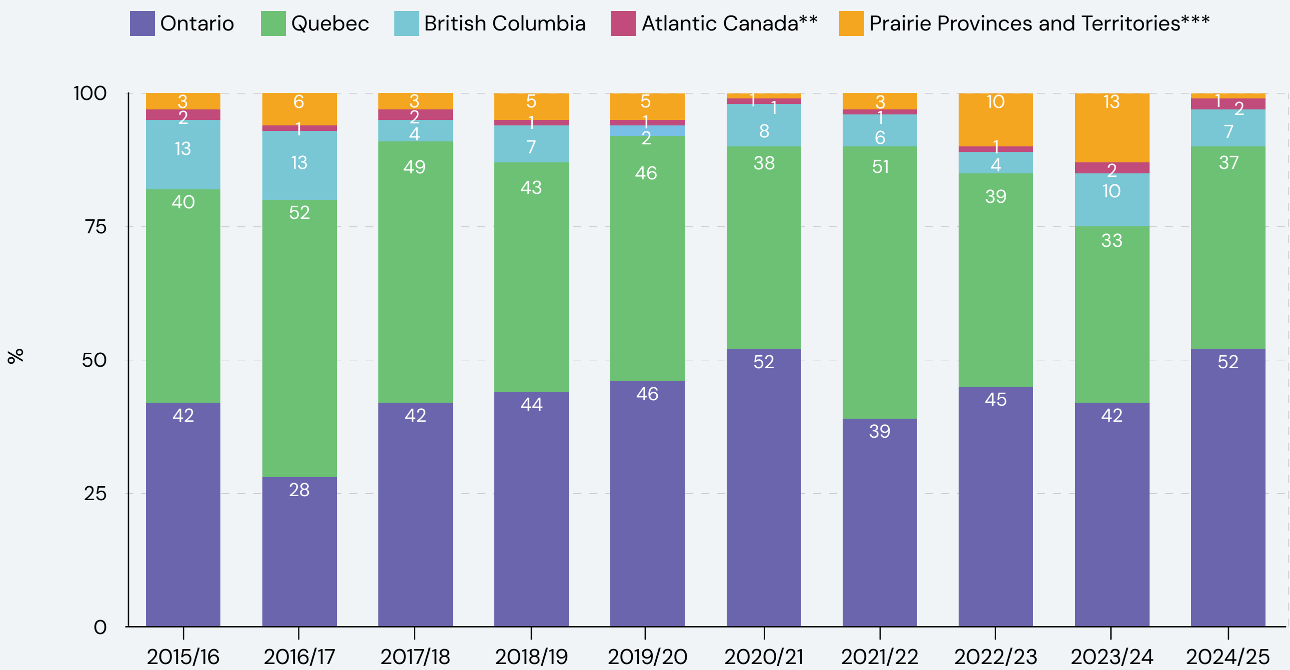
Source:
Source: Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2025*.
Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. See Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the recoding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Volume of Canadian theatrical feature film production, by region*, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Ontario	198	40	20.4
Quebec	159	13	7.9
British Columbia	47	-13	-27.6
Atlantic Canada**	11	0	-3.4
Prairie Provinces and Territories***	60	-54	-91.3
Total	**475**	**-15**	**-3.2**

Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2025*.
Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. See Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the recoding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

Exhibit 4-4 b) Share of total volume of Canadian theatrical feature film production, by region*



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2025*.
Due to the low number of projects (particularly theatrical feature film projects) in certain provinces and territories, production volume statistics are grouped by region to avoid disclosure of budgets for individual projects. See Notes on methodology for additional information.
Historical figures for certain provinces/territories have been revised due to the recoding of some productions to different fiscal years (in which principal photography started) and/or to different provinces/territories.
* Based on province or territory where lead producer is based.
** Nova Scotia, Newfoundland and Labrador, New Brunswick and Prince Edward Island.
*** Alberta, Saskatchewan, Manitoba, Yukon, Nunavut and Northwest Territories.

4.3 Program categories

Canadian theatrical feature film production

Exhibit 4-5 Canadian theatrical feature film production, volume and number of films by category

VOLUME ($ MILLIONS)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Fiction	179	253	205	269	245	167	264	338	389	337
Other categories*	88	39	69	50	66	76	76	119	86	123
Total	**267**	**291**	**273**	**319**	**312**	**243**	**340**	**456**	**475**	**460**
NUMBER OF FILMS	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Fiction	91	90	80	110	104	56	98	118	109	95
Other categories*	31	33	42	38	32	18	49	41	38	37
Total	**122**	**123**	**122**	**148**	**136**	**74**	**148**	**158**	**146**	**132**

Source:
Estimates based on data from CAVCO.
Note:
Some totals may not sum due to rounding.
*Includes documentary, children's and youth, and variety and performing arts categories.

4.4 Budgets

Canadian theatrical feature film production

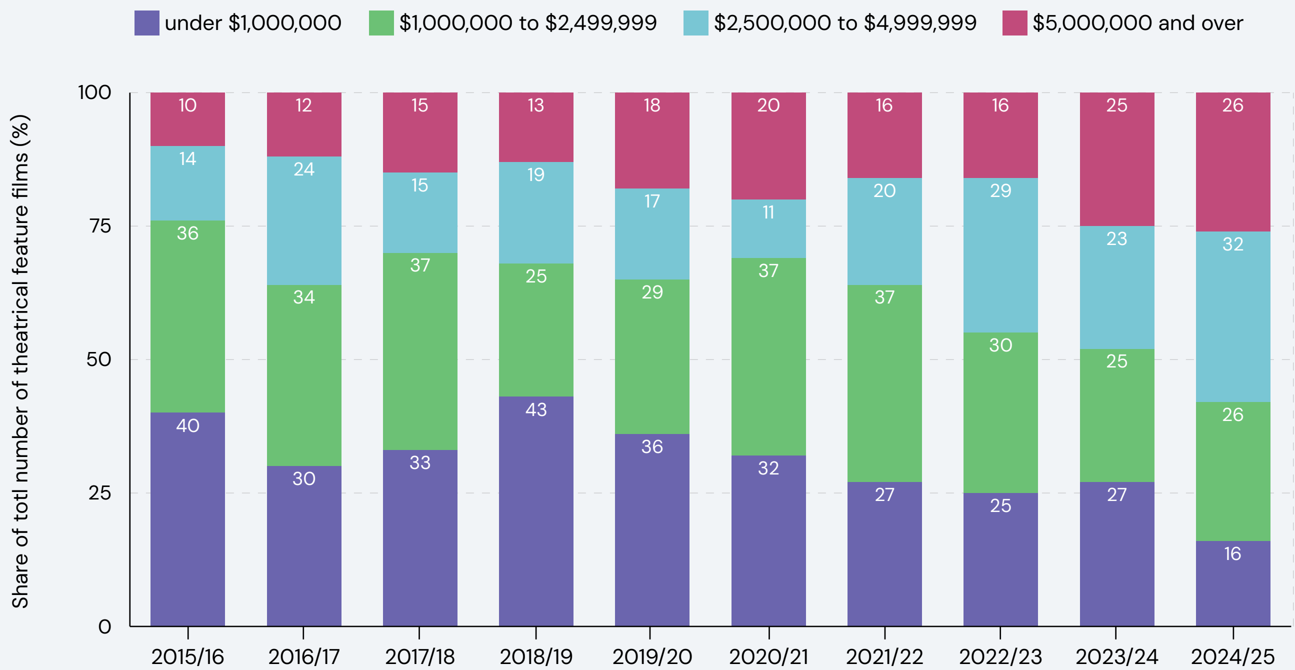
Box 3 Telefilm Canada

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

In 2024/25, Telefilm Canada provided $144.5 million in ongoing financial support to Canada's audiovisual sector. This included $106.3 million in support of the audiovisual industry (e.g. production, development, theatrical documentary programs) and $30.7 million in funding for promotional support (e.g. support for Canadian film festivals, domestic and international marketing and promotion, Theatrical Exhibition Program support for exhibitors).[19]

[19] For this report, the feature film category includes all films 75 minutes and over in length. Theatrical feature films are financed for initial release in theatres.

Exhibit 4-6 Theatrical feature film projects, by budget size (fiction category only)



Source:
Estimates based on data collected from CAVCO.
Note:
Some totals may not sum due to rounding.
Budget calculations exclude the foreign budgets of audiovisual treaty coproductions.

The average and median budgets for fictional theatrical feature films have been growing at a steady rate. Average budgets for all languages grew from $2.3 million in 2021/22 to $3.5 in 2024/25.

Exhibit 4-7 Average budgets of theatrical feature films (fiction category only), ($ millions)

ENGLISH-LANGUAGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Average	1.8	2.6	2.8	2.2	2.5	2.7	2.1	3	3.3	4.1
Median	1	1.6	1.3	1.2	1.2	1.2	1.2	1.5	1.8	2.2
FRENCH-LANGUAGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Average	2.2	3.4	2.2	3.2	2.6	3.5	2.8	2.6	3	2.6
Median	1.8	2.4	1.7	3	1.9	2.2	2	1.9	2.3	2.4
ALL LANGUAGES	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Average	2	2.8	2.6	2.5	2.5	3	2.3	2.9	3.2	3.5
Median	1.3	1.8	1.4	1.6	1.3	1.6	1.4	1.7	1.9	2.3

Source:
Estimates based on data from CAVCO.
Note:
Calculations exclude the foreign budgets of audiovisual treaty coproductions.
* Includes production in bilingual format and non-official languages.

5 Financing of Canadian television programs and feature films

Canadian producers finance their television programs and theatrical feature films by raising funding from a variety of different sources.

Canadian television programs almost always receive a broadcaster licence fee from a Canadian private or public broadcaster. Canadian distributors, as well as foreign pre-sales and advances, are also often significant sources of financing for many productions. Canadian producers additionally receive federal and provincial tax credits (see Box 4), as well as funding or financing from the Canada Media Fund (CMF), Certified Independent Production Funds (CIPFs) [20] and potentially other types of private or public funding.

Canadian theatrical feature films also raise financing from many of the same sources, although the relative proportions can differ significantly. Broadcaster licence fees are typically low, while financing from Canadian distributors, Telefilm Canada, and foreign pre-sales and advances tends to be relatively higher. Producers of Canadian theatrical feature films also receive federal and provincial tax credits, funding from the CMF and CIPFs, as well as other forms of private and public funding.

Highlights from 2024/25

- As in prior years, Canadian content production was supported by a number of different financing sources, with important contributions from broadcaster licence fees, federal and provincial tax credits, production funds, and distribution pre-sales and advances.
- Differences in financing structures were observed between English- and French-language production, as well as between television production and theatrical feature films.
- Canadian distributors and foreign pre-sales and advances were much more important sources of financing for English-language production (34%) than for French-language production (2%). Conversely, private and public broadcaster licence fees accounted for a larger share of financing for French-language production (44%) than for English-language production (14%).
- While broadcaster licence fees accounted for 28% of the financing of Canadian television production, they represented less than 2% of the financing for Canadian theatrical feature films.
- French-language Canadian theatrical feature film production continued to rely on significant financing from Canadian broadcaster licence fees, other public funding sources (i.e. excluding Telefilm Canada and the CMF), and Telefilm Canada.

[20] Certified Independent Production Funds (CIPFs) include funds established to support the development and production of Canadian content and certified by the CRTC in accordance with Broadcasting Regulatory Policy CRTC 2016-343. CIPFs receive financial contributions from television, online streaming, and cable and satellite companies operating in Canada. There are currently 11 CIPFs: Bell Fund, Black Screen Office Fund, Canadian Independent Screen Fund for Black and People of Colour (BPOC) Creators, Eastlink TV Independent Production Fund Program, Independent Production Fund, Indigenous Screen Office Fund, Quebecor Fund, Rogers Group of Funds, Shaw Rocket Fund, Telefilm Canada Talent Fund, and TELUS Fund.

5.1 Canadian content

Financing

Box 4 Financing from Canadian production companies

Federal and provincial tax credits represent part of a Canadian production company's contribution in film and television projects. Canadian production companies receive tax credits based on their eligible labour expenditures, with some provinces (i.e., Alberta and Manitoba) providing tax credits that are based on all production expenditures rather than solely on eligible labour costs. In almost all cases, the amount of tax credits received by the producer for a specific project is invested directly into that project, in order to complete the project's financing.

After taking into account federal and provincial tax credits and production company financing, the producer's contribution to a production budget is, at a minimum, between 30% and 35% of the budget in most instances. Producers also organize domestic and foreign distribution, as well as arrange bank financing.

Many producers also point to the 'new normal' that sees production companies take on greater financial risks in developing film or television projects prior to obtaining production financing. In part, industry consolidation among Canadian broadcasters (i.e. the primary buyers of Canadian content), and a subsequent strengthening of their market power in the television content commissioning market have contributed to this new normal.

Exhibit 5-1 a) Financing for Canadian film and television production: All languages

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	293	566	602	445	432
Public broadcaster licence fees	339	399	401	423	436
Federal tax credit (1)	265	391	427	372	366
Provincial tax credits (1)	487	771	837	710	705
Canadian distributors (2)	360	433	555	386	449
Foreign pre-sales and advances (3)	332	493	495	470	415
Canada Media Fund (4)	280	288	290	303	292
Telefilm Canada	43	82	86	84	89
CIPFs (5)	53	56	46	44	39
Other public (6)	98	216	252	205	180
Other private (7)	68	195	255	252	212
Total	**2,618**	**3,890**	**4,245**	**3,695**	**3,615**

Financing for Canadian film and television production: All languages

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	11	14	14	12	12
Public broadcaster licence fees	13	10	9	11	12
Federal tax credit (1)	10	10	10	10	10
Provincial tax credits (1)	19	20	20	19	20
Canadian distributors (2)	14	11	13	12	13
Foreign pre-sales and advances (3)	13	13	12	13	11
Canada Media Fund (4)	11	7	7	8	8
Telefilm Canada	2	2	2	2	2
CIPFs (5)	2	1	1	1	1
Other public (6)	4	6	6	6	5
Other private (7)	3	6	6	6	6
Total	**100**	**100**	**100**	**100**	**100**

Source: Source:
Estimates based on data obtained from CAVCO, CMF Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) CIPFs include funds set up to support the development and production of Canadian content, which have been certified by the CRTC in accordance with Broadcasting Regulatory Policy CRTC 2016-343. CIPFs receive financial contributions from television, online streaming, and cable and satellite companies operating in Canada.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

English-language Canadian content production experienced lower levels of financing from other private sources, foreign distributors and broadcasters, the CMF, CIPFs, and Canadian private broadcasters, which were offset by higher levels of financing from Canadian public broadcasters, Canadian distributors and Telefilm Canada.

Exhibit 5-1 b) Financing for Canadian film and television production: English-language, bilingual format and non-official languages

(AMOUNT $ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	140	260	304	206	185
Public broadcaster licence fees	155	207	200	181	186
Federal tax credit (1)	185	275	310	257	250
Provincial tax credits (1)	360	588	657	542	517
Canadian distributors (2)	350	417	537	362	430
Foreign pre-sales and advances (3)	332	480	493	464	408
Canada Media Fund (4)	188	195	197	199	188
Telefilm Canada	26	56	58	56	59
CIPFs (5)	37	39	34	31	29
Other public (6)	21	77	140	139	81
Other private (7)	28	127	177	190	156
Total	**1,820**	**2,722**	**3,106**	**2,628**	**2,489**

Financing for Canadian film and television production: English-language, bilingual format and non-official languages

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	8	10	10	8	7
Public broadcaster licence fees	9	8	6	7	7
Federal tax credit (1)	10	10	10	10	10
Provincial tax credits (1)	20	22	21	21	21
Canadian distributors (2)	19	15	17	14	17
Foreign pre-sales and advances (3)	18	17	16	17	16
Canada Media Fund (4)	10	7	6	8	7
Telefilm Canada	1	2	2	2	2
CIPFs (5)	2	1	1	1	1
Other public (6)	1	3	5	5	5
Other private (7)	2	5	6	7	5
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) CIPFs include funds set up to support the development and production of Canadian content, which have been certified by the CRTC in accordance with Broadcasting Regulatory Policy CRTC 2016-343. CIPFs receive financial contributions from television, online streaming, and cable and satellite companies operating in Canada.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

The annual growth in French-language Canadian content (5.4%) in 2024/25 was supported primarily by provincial tax credits, increased levels of financing from other direct public sources (i.e. other than Telefilm Canada and the CMF), and Canadian broadcasters.

Exhibit 5-1 c) Financing for Canadian film and television production: French-language

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	153	306	298	239	247
Public broadcaster licence fees	184	192	200	242	250
Federal tax credit (1)	80	117	117	115	116
Provincial tax credits (1)	127	183	180	168	189
Canadian distributors (2)	10	16	19	25	19
Foreign pre-sales and advances (3)	2	13	3	6	7
Canada Media Fund (4)	92	93	93	104	104
Telefilm Canada	17	26	28	28	30
CIPFs (5)	16	17	12	13	10
Other public (6)	77	138	112	66	99
Other private (7)	40	68	78	62	56
Total	**798**	**1,169**	**1,139**	**1,068**	**1,126**

Financing for Canadian film and television production: French-language

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	19	26	26	22	22
Public broadcaster licence fees	23	16	18	23	22
Federal tax credit (1)	10	10	10	11	10
Provincial tax credits (1)	16	16	16	16	17
Canadian distributors (2)	1	1	2	2	2
Foreign pre-sales and advances (3)	1	1	1	1	1
Canada Media Fund (4)	12	8	8	10	9
Telefilm Canada	2	2	2	3	3
CIPFs (5)	2	1	1	1	1
Other public (6)	10	12	10	6	9
Other private (7)	5	6	7	6	5
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) CIPFs include funds set up to support the development and production of Canadian content, which have been certified by the CRTC in accordance with Broadcasting Regulatory Policy CRTC 2016-343. CIPFs receive financial contributions from television, online streaming, and cable and satellite companies operating in Canada.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

There was an estimated $938 million spent on the production of feature-length Canadian content in 2024/25, across the television and theatrical release windows. Outside of tax credits, the largest sources of financing for that production were foreign pre-sales and advances, Canadian distributors, Telefilm Canada and other direct public funding.

Exhibit 5-1 d) Financing for Canadian film and television production: Feature-length production (television + theatrical release)

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	9	11	22	15	8
Public broadcaster licence fees	1	3	6	7	4
Federal tax credit (1)	58	67	93	79	73
Provincial tax credits (1)	142	176	236	211	196
Canadian distributors (2)	148	131	221	145	127
Foreign pre-sales and advances (3)	169	186	239	219	203
Canada Media Fund (4)	5	16	25	28	89
Telefilm Canada	43	82	86	84	15
Other public (6)	35	75	75	85	76
Other private (7)	41	60	85	95	109
Total	**650**	**807**	**1,087**	**968**	**900**

Exhibit 5-1 d) Financing for Canadian film and television production: Feature-length production (television + theatrical release)

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	1	1	2	2	1
Public broadcaster licence fees	1	1	1	1	1
Federal tax credit (1)	9	8	9	8	8
Provincial tax credits (1)	22	22	22	22	22
Canadian distributors (2)	23	16	20	15	15
Foreign pre-sales and advances (3)	26	23	22	23	22
Canada Media Fund (4)	1	2	2	2	2
Telefilm Canada	7	10	8	8	9
Other public (6)	6	9	7	9	13
Other private (7)	5	8	8	10	9
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) CIPFs include funds set up to support the development and production of Canadian content, which have been certified by the CRTC in accordance with Broadcasting Regulatory Policy CRTC 2016-343. CIPFs receive financial contributions from television, online streaming, and cable and satellite companies operating in Canada.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

5.2 Canadian television

Financing

Exhibit 5-2 a) Financing of Canadian television production: All languages

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	292	564	599	443	431
Public broadcaster licence fees	338	397	399	420	434
Federal tax credit (1)	250	372	399	342	337
Provincial tax credits (1)	443	705	749	615	614
Canadian distributors (2)	305	404	462	345	416
Foreign pre-sales and advances (3)	309	460	464	409	340
Canada Media Fund (4)	278	280	281	290	283
CIPFs (5)	50	52	42	40	35
Other public (6)	65	155	195	134	121
Other private (7)	48	161	200	183	144
Total	**2,376**	**3,550**	**3,789**	**3,220**	**3,155**

Financing of Canadian television production: All languages

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	12	16	16	14	14
Public broadcaster licence fees	14	11	11	13	14
Federal tax credit (1)	11	10	11	11	11
Provincial tax credits (1)	19	20	20	19	19
Canadian distributors (2)	13	11	12	11	13
Foreign pre-sales and advances (3)	13	13	12	13	11
Canada Media Fund (4)	12	8	7	9	9
CIPFs (5)	2	1	1	1	1
Other public (6)	3	4	5	4	4
Other private (7)	2	5	6	6	5
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF, Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) Includes data from the Bell Fund, Eastlink TV Independent Production Fund Program, Independent Production Fund, Indigenous Screen Office Fund, Quebecor Fund, Shaw Rocket Fund and TELUS Fund. Excludes data for Black Screen Office Fund, and Canadian Independent Screen Fund for BPOC Creators.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

The decline in Canadian television production in English, bilingual format or non-official languages (–3.9%) in 2024/25 was attributable to lower levels of financing from foreign pre-sales and advances, private Canadian broadcaster licence fees, and other Canadian public and private financing. Financing from Canadian distributors and Canadian public broadcasters, however, did increase in 2024/25.

Exhibit 5-2 b) Financing of Canadian television production: English-language, bilingual format and non-official languages

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	139	259	302	204	185
Public broadcaster licence fees	155	206	199	178	185
Federal tax credit (1)	173	259	285	230	225
Provincial tax credits (1)	333	550	593	468	457
Canadian distributors (2)	301	397	454	331	410
Foreign pre-sales and advances (3)	309	450	463	404	336
Canada Media Fund (4)	187	189	188	187	182
CIPFs (5)	35	36	31	28	26
Other public (6)	17	71	131	100	71
Other private (7)	16	105	129	126	93
Total	**1,664**	**2,523**	**2,775**	**2,256**	**2,169**

Financing of Canadian television production: English-language, bilingual format and non-official languages

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	8	10	11	9	9
Public broadcaster licence fees	9	8	7	8	9
Federal tax credit (1)	10	10	10	10	10
Provincial tax credits (1)	20	22	21	21	21
Canadian distributors (2)	18	16	16	15	19
Foreign pre-sales and advances (3)	19	18	17	18	15
Canada Media Fund (4)	11	7	7	8	8
CIPFs (5)	2	1	1	1	1
Other public (6)	1	3	5	4	4
Other private (7)	1	5	5	6	4
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF, Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) Includes data from the Bell Fund, Eastlink TV Independent Production Fund Program, Independent Production Fund, Indigenous Screen Office Fund, Quebecor Fund, Shaw Rocket Fund and TELUS Fund. Excludes data for Black Screen Office Fund, and Canadian Independent Screen Fund for BPOC Creators.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

Exhibit 5-2 c) Financing of Canadian television production: French-language

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	152	306	297	239	246
Public broadcaster licence fees	184	192	200	241	249
Federal tax credit (1)	77	113	114	112	112
Provincial tax credits (1)	109	155	155	147	157
Canadian distributors (2)	4	7	9	13	5
Foreign pre-sales and advances (3)	0	10	1	5	4
Canada Media Fund (4)	91	91	92	103	101
CIPFs (5)	15	16	11	12	9
Other public (6)	48	83	64	34	50
Other private (7)	32	56	71	57	51
Total	**712**	**1,028**	**1,014**	**964**	**986**

Financing of Canadian television production: French-language

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	21	30	29	25	25
Public broadcaster licence fees	26	19	20	25	25
Federal tax credit (1)	11	11	11	12	11
Provincial tax credits (1)	15	15	15	15	16
Canadian distributors (2)	1	1	1	1	1
Foreign pre-sales and advances (3)	0	1	1	1	1
Canada Media Fund (4)	13	9	9	11	10
CIPFs (5)	2	2	1	1	1
Other public (6)	7	8	6	4	6
Other private (7)	4	5	7	6	6
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF, Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) Includes data from the Bell Fund, Eastlink TV Independent Production Fund Program, Independent Production Fund, Indigenous Screen Office Fund, Quebecor Fund, Shaw Rocket Fund and TELUS Fund. Excludes data for Black Screen Office Fund, and Canadian Independent Screen Fund for BPOC Creators.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

Foreign pre-sales and advances, and Canadian distributors remained the largest sources of financing for Canadian TV movie production in 2024/25. Canadian broadcasters, the CMF, direct public funding and other private sources also contributed to the financing of Canadian TV movie production, but at much smaller levels than the two largest sources.

Exhibit 5-2 d) Financing of Canadian television production: TV movies (all languages)

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	8	9	19	13	7
Public broadcaster licence fees	0	2	4	3	2
Federal tax credit (1)	43	47	65	50	44
Provincial tax credits (1)	97	109	147	113	105
Canadian distributors (2)	93	102	129	113	94
Foreign pre-sales and advances (3)	146	152	209	159	129
Canada Media Fund (4)	3	8	15	12	6
Other public (6)	6	15	17	16	18
Other private (7)	11	23	26	15	37
Total	**407**	**467**	**631**	**493**	**440**

Financing of Canadian television production: TV movies (all languages)

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	2	2	3	3	2
Public broadcaster licence fees	0	1	1	1	1
Federal tax credit (1)	10	10	10	10	10
Provincial tax credits (1)	24	23	23	23	24
Canadian distributors (2)	23	22	20	23	21
Foreign pre-sales and advances (3)	36	33	33	32	29
Canada Media Fund (4)	1	2	2	3	1
Other public (6)	2	3	3	3	4
Other private (7)	3	5	4	3	8
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF, Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) Includes data from the Bell Fund, Eastlink TV Independent Production Fund Program, Independent Production Fund, Indigenous Screen Office Fund, Quebecor Fund, Shaw Rocket Fund and TELUS Fund. Excludes data for Black Screen Office Fund, and Canadian Independent Screen Fund for BPOC Creators.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

Canadian broadcasters played a significant role in the financing of lifestyle and human interest, and variety and performing arts production in 2024/25. In the fiction, and children's and youth categories Canadian distributors played a relatively larger financing role than Canadian broadcasters. While in the documentary category, Canadian producers relied almost equally on Canadian broadcasters (25%) and Canadian distributors and foreign sources (21%).

Exhibit 5-3 a) Financing of Canadian television production, by category, 2024/25: All languages

AMOUNT ($ MILLIONS)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST (1)	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Private broadcaster licence fees	147	13	57	181	34	431
Public broadcaster licence fees	192	49	38	110	45	434
Federal tax credit (2)	182	43	38	55	20	337
Provincial tax credits (2)	364	89	75	59	28	614
Canadian distributors (3)	226	132	42	14	1	416
Foreign pre-sales and advances (4)	275	20	38	5	2	340
Canada Media Fund (5)	160	30	72	0	21	283
Other public (6)	73	15	10	16	8	121
Other private (7)	120	11	9	32	7	179
Total	**1,738**	**401**	**379**	**471**	**166**	**3,155**

Financing of Canadian television production, by category, 2024/25: All languages

SHARE OF TOTAL FINANCING (%)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST (1)	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Private broadcaster licence fees	9	3	15	39	22	14
Public broadcaster licence fees	11	12	10	24	27	14
Federal tax credit (2)	10	11	10	12	12	11
Provincial tax credits (2)	21	22	20	12	17	19
Canadian distributors (3)	13	34	11	3	1	13
Foreign pre-sales and advances (4)	16	5	10	1	1	11
Canada Media Fund (5)	9	7	19	0	11	9
Other public (6)	5	4	3	3	5	4
Other private (7)	7	3	2	7	4	5
Total	**100**	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO and CMF.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.
(1) Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.
(2) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(3) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(4) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(5) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

In English-language Canadian television production, Canadian broadcasters played a significant role in the financing of lifestyle and human interest, and variety and performing arts production in 2024/25. Meanwhile, in the fiction, and children's and youth categories, Canadian broadcasters played an even smaller financing role than observed across all Canadian television production. Canadian distributors and foreign sources played a relatively larger financing role those categories. The production of English-language documentary television production also relied more heavily on financing from Canadian distributors, foreign sources and the CMF.

Exhibit 5-3 b) Financing of Canadian television production, by category, 2024/25: English-language, bilingual format and non-official languages

AMOUNT ($ MILLIONS)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST (1)	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Private broadcaster licence fees	65	7	36	67	10	185
Public broadcaster licence fees	110	9	20	44	1	185
Federal tax credit (2)	140	32	27	23	3	225
Provincial tax credits (2)	295	66	56	35	4	457
Canadian distributors (3)	222	132	42	14	0	410
Foreign pre-sales and advances (4)	275	20	37	4	0	336
Canada Media Fund (5)	109	16	50	0	7	182
Other public (6)	47	6	5	11	2	71
Other private (7)	92	7	7	12	1	119
Total	**1,355**	**295**	**281**	**209**	**29**	**2,169**

Financing of Canadian television production, by category, 2024/25: English-language, bilingual format and non-official languages

SHARE OF TOTAL FINANCING (%)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST (1)	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Private broadcaster licence fees	5	2	13	33	34	9
Public broadcaster licence fees	8	3	7	21	5	9
Federal tax credit (2)	10	11	10	11	11	10
Provincial tax credits (2)	22	22	20	16	15	21
Canadian distributors (3)	16	46	15	6	1	19
Foreign pre-sales and advances (4)	20	7	13	2	0	15
Canada Media Fund (5)	8	5	18	0	24	8
Other public (6)	4	2	2	5	7	4
Other private (7)	7	2	3	6	3	5
Total	**100**	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO and CMF.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.
(1) Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.
(2) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(3) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(4) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(5) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

In French-language Canadian television production, Canadian broadcasters played a significant role in financing across all categories in 2024/25, particularly in the lifestyle, and human interest and variety and performing arts categories. Meanwhile, Canadian distributors and foreign sources had a much more limited role (compared to English-language television production) in all categories.

Exhibit 5-3 c) Financing of Canadian television production, by category, 2024/25: French-language

AMOUNT ($ MILLIONS)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST (1)	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Private broadcaster licence fees	82	5	22	114	24	246
Public broadcaster licence fees	82	40	18	66	44	249
Federal tax credit (2)	42	11	10	33	16	112
Provincial tax credits (2)	69	22	18	24	24	157
Canadian distributors (3)	4	0	0	0	1	5
Foreign pre-sales and advances (4)	0	0	1	1	2	4
Canada Media Fund (5)	51	14	22	0	14	101
Other public (6)	26	9	5	5	6	50
Other private (7)	28	4	2	20	6	60
Total	**383**	**106**	**98**	**262**	**137**	**986**

Financing of Canadian television production, by category, 2024/25: French-language

SHARE OF TOTAL FINANCING (%)	FICTION	CHILDREN'S AND YOUTH	DOCUMENTARY	LIFESTYLE AND HUMAN INTEREST (1)	VARIETY AND PERFORMING ARTS	ALL CATEGORIES
Private broadcaster licence fees	21	5	22	43	18	25
Public broadcaster licence fees	21	38	18	25	32	25
Federal tax credit (2)	11	11	10	12	12	11
Provincial tax credits (2)	18	21	19	9	17	16
Canadian distributors (3)	1	0	0	0	1	1
Foreign pre-sales and advances (4)	0	0	1	1	2	1
Canada Media Fund (5)	12	13	22	0	10	10
Other public (6)	8	9	6	2	4	5
Other private (7)	7	4	2	8	4	6
Total	**100**	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO and CMF.
Note:
Some totals may not sum due to rounding. Data includes an estimate of CRTC-certified television production.
(1) Includes magazine programming and a small amount of programming that was previously allocated to the educational/instructional category.
(2) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(3) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(4) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(5) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

5.3 Canadian theatrical feature film

Financing

While the overall volume of Canadian theatrical feature film production was virtually unchanged in 2024/25, there was a slight increase in financing from foreign sources, other private sources and Telefilm Canada – the latter of which increased from $84 million to $89 million.

Exhibit 5-4 a) Financing of Canadian theatrical feature film production: All languages

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	1	2	3	2	1
Public broadcaster licence fees	1	2	2	4	2
Federal tax credit (1)	15	19	28	30	29
Provincial tax credits (1)	45	66	88	95	92
Canadian distributors (2)	55	29	93	42	34
Foreign pre-sales and advances (3)	23	33	31	61	75
Canada Media Fund (4)	43	82	86	84	89
Telefilm Canada	2	8	9	13	9
CIPFs (5)	3	4	4	4	4
Other public (6)	33	61	57	72	58
Other private (7)	20	34	55	69	68
Total	**243**	**340**	**456**	**475**	**460**

Financing of Canadian theatrical feature film production: All languages

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	1	1	1	1	1
Public broadcaster licence fees	1	1	1	1	1
Federal tax credit (1)	6	6	6	6	6
Provincial tax credits (1)	19	19	19	20	20
Canadian distributors (2)	23	9	20	9	7
Foreign pre-sales and advances (3)	10	10	7	13	16
Canada Media Fund (4)	18	24	19	18	19
Telefilm Canada	1	2	2	3	2
CIPFs (5)	1	1	1	1	1
Other public (6)	14	18	13	15	13
Other private (7)	8	10	12	14	16
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF, Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) Excludes data for Black Screen Office Fund, and Canadian Independent Screen Fund for BPOC Creators.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

Canadian theatrical feature film production in English, bilingual format and other non-official languages also displayed a shift in financing in 2024/25, away from Canadian distributors and other Canadian public sources towards foreign sources, other direct Canadian private financing, and Telefilm Canada – the latter of which increased slightly from $56 million to $59 million.

Exhibit 5-4 b) Financing of Canadian theatrical feature film production: English-language, bilingual format and non-official languages

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	1	1	1	2	1
Public broadcaster licence fees	1	1	1	3	1
Federal tax credit (1)	12	15	25	27	25
Provincial tax credits (1)	27	38	64	74	60
Canadian distributors (2)	49	19	83	30	20
Foreign pre-sales and advances (3)	23	31	30	60	72
Canada Media Fund (4)	26	56	58	56	59
Telefilm Canada	1	6	9	12	6
CIPFs (5)	2	3	3	3	3
Other public (6)	4	6	9	40	10
Other private (7)	12	22	48	64	63
Total	**156**	**199**	**331**	**371**	**320**

Financing of Canadian theatrical feature film production: English-language, bilingual format and non-official languages

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	1	1	1	1	1
Public broadcaster licence fees	1	1	1	1	1
Federal tax credit (1)	8	8	8	7	8
Provincial tax credits (1)	17	19	19	20	19
Canadian distributors (2)	31	10	25	8	6
Foreign pre-sales and advances (3)	14	15	9	16	22
Canada Media Fund (4)	17	28	18	15	18
Telefilm Canada	1	3	3	3	2
CIPFs (5)	1	2	1	1	1
Other public (6)	3	3	3	11	3
Other private (7)	8	11	14	17	21
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF, Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) Excludes data for Black Screen Office Fund, and Canadian Independent Screen Fund for BPOC Creators.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

The annual growth in French-language Canadian theatrical feature film production in 2024/25 (40.4%) was largely supported by increased levels of other Canadian public funding (i.e. funding from public sources other than Telefilm Canada and the CMF) and Canadian distributor financing.

Exhibit 5-4 c) Financing of Canadian theatrical feature film production: French-language

AMOUNT ($ MILLIONS)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	1	1	1	1	1
Public broadcaster licence fees	1	1	1	1	1
Federal tax credit (1)	3	4	3	3	4
Provincial tax credits (1)	18	28	24	21	31
Canadian distributors (2)	6	10	10	11	14
Foreign pre-sales and advances (3)	2	3	1	1	3
Canada Media Fund (4)	17	26	28	28	30
Telefilm Canada	1	2	1	1	3
CIPFs (5)	1	1	1	1	1
Other public (6)	29	55	48	32	48
Other private (7)	8	12	7	4	5
Total	**87**	**141**	**125**	**104**	**140**

Financing of Canadian theatrical feature film production: French-language

SHARE OF TOTAL FINANCING (%)	2020/21	2021/22	2022/23	2023/24	2024/25
Private broadcaster licence fees	1	1	1	1	1
Public broadcaster licence fees	1	1	1	1	1
Federal tax credit (1)	4	3	3	3	3
Provincial tax credits (1)	20	20	20	20	22
Canadian distributors (2)	7	7	8	11	10
Foreign pre-sales and advances (3)	2	2	1	1	2
Canada Media Fund (4)	20	18	22	27	21
Telefilm Canada	2	1	1	1	2
CIPFs (5)	1	1	1	1	1
Other public (6)	34	39	38	31	35
Other private (7)	9	10	6	4	4
Total	**100**	**100**	**100**	**100**	**100**

Source:
Estimates based on data obtained from CAVCO, CMF, Telefilm Canada and CIPFs.
Note:
Some totals may not sum due to rounding.
(1) Canadian production companies receive federal and provincial tax credits based on their eligible expenditures, and, in almost all cases, invest their tax credits directly into their television projects, in order to complete their project financing.
(2) Canadian distributors' financing includes minimum guarantees and advances invested in television programs and theatrical feature films in exchange for rights to market, license and exhibit the audiovisual productions in Canada, unsold territories outside of Canada or on global distribution platforms.
(3) Foreign pre-sales and advances include broadcast licence fees, minimum guarantees, advances and other forms of financing from broadcasters, distributors or other organizations based outside of Canada.
(4) Only programming in the fiction, children's and youth, documentary and variety and performing arts categories is eligible for CMF funding.
(5) Excludes data for Black Screen Office Fund, and Canadian Independent Screen Fund for BPOC Creators.
(6) 'Other public' includes financing from provincial governments (excluding SODEC), and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.
(7) 'Other private' includes financing from production companies (excluding the tax credit contribution), broadcaster equity and other Canadian private investors.

6 Audiovisual treaty coproduction

The Government of Canada currently has audiovisual coproduction treaties or memoranda of understanding with close to 60 partners.[21] These agreements offer Canadian and foreign producers the opportunity to combine their creative, technical and financial resources to make coproductions that can be granted national production status in each of the partnering countries.

Coproductions that have obtained national production status are considered Canadian for the purposes of domestic incentives and broadcast quotas. This status can also enable foreign producers to access their own country's incentives for the foreign portion of the budget. Partnering production companies can take either a majority or minority participation position in an audiovisual treaty coproduction depending on the proportion of financing each producer brings to the project.

Highlights from 2024/25

- After experiencing two consecutive fiscal years of growth in 2021/22 and 2022/23, Canada's overall volume of treaty coproduction (i.e. total global budgets) declined in 2023/24 and again in 2024/25.
- The UK and France continued to be Canada's leading coproduction partners between 2015/16 and 2024/25. France was the leading partner for feature films while the UK was the leading partner for television productions.
- Both majority ($111 million) and minority ($175 million)-Canadian treaty coproductions declined in 2024/25, although to a greater extent for majority-Canadian productions.
- The number of majority-Canadian treaty coproduction projects rose slightly, while the number of minority-Canadian coproductions declined by three in 2024/25.
- In the television sub-segment, English-language treaty coproduction decreased to $82 million in total budgets, while there were no French-language treaty coproduction projects in 2024/25. Overall, including coproductions in other languages, treaty coproduction decreased to $83 million in total budgets. There was also a decrease in the total number of projects.
- In the feature film sub-segment, English-language treaty coproduction increased to $166 million in total budgets, while French-language treaty coproduction decreased to $28 million in total budgets. Overall, including coproductions in other languages, treaty coproduction decreased to $203 million in total budgets. There was however, a slight increase in the total number of projects.

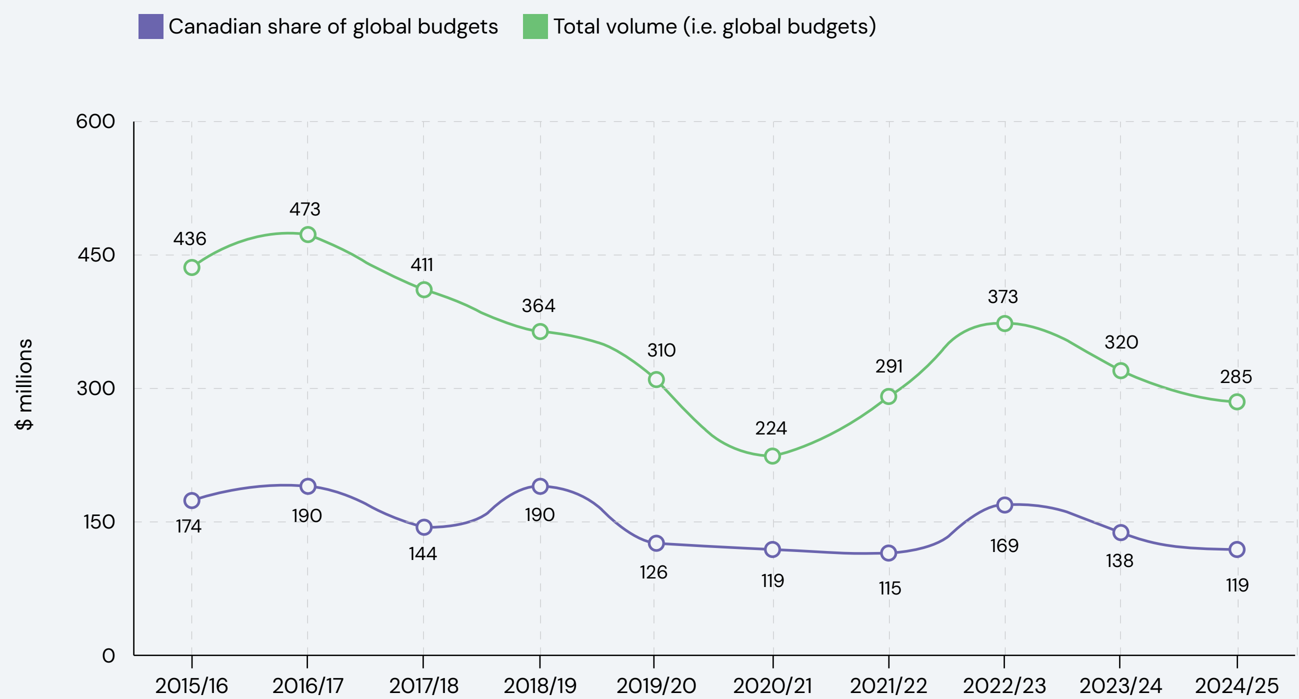
[21] A list of these agreements can be found on Telefilm Canada's website at https://telefilm.ca/en/coproduction/international-treaties.

6.1 All release windows

Audiovisual treaty production

After experiencing two consecutive fiscal years of growth in 2021/22 and 2022/23, Canada's overall volume of treaty coproduction (i.e. total global budgets) declined in 2023/34 and again in 2024/25.

Exhibit 6-1 Volume* of Canadian audiovisual treaty coproduction, all release windows



Source:
Telefilm Canada.
Note:
Statistics as of September 2025.
*Volume of coproduction refers to the value of total global budgets for coproduction projects and includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).

Across all release windows, English-language treaty coproduction decreased by 3.1% to $248 million in total budgets, while French-language treaty coproduction decreased by 44.8% to $28 million in total budgets. Overall, including coproductions in other languages, treaty coproduction decreased by 10% to $285 million in total budgets. This is despite a slight increase in the total number of projects.

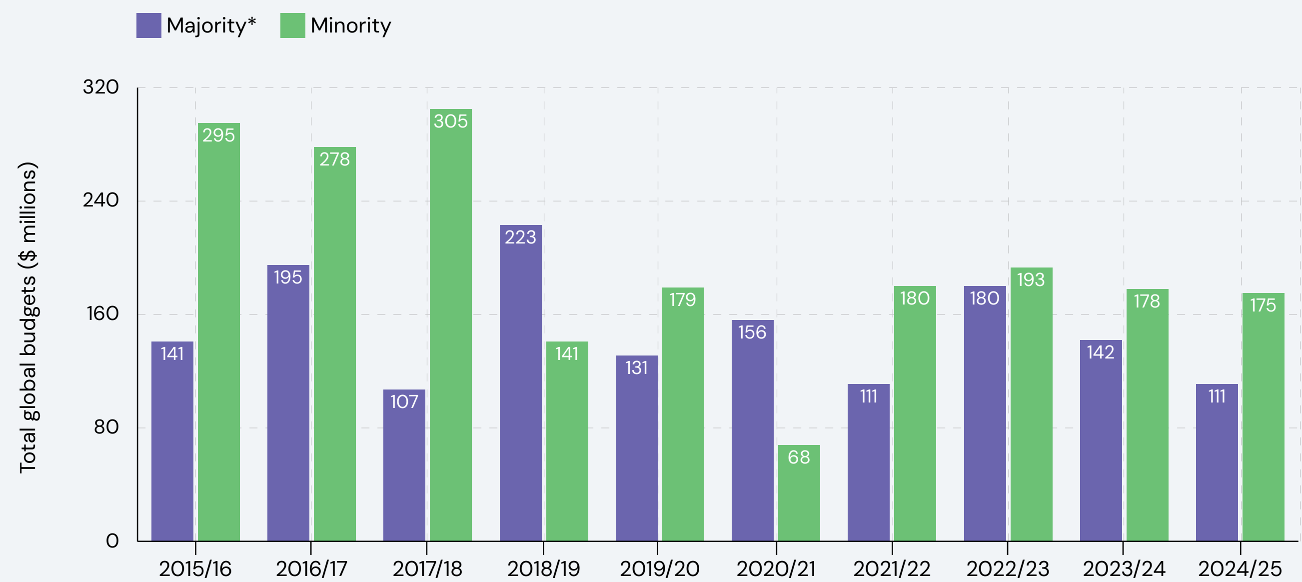
Exhibit 6-2 Audiovisual treaty coproduction, volume* and number of projects, all release windows

ENGLISH-LANGUAGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	141	179	131	180	114	110	93	136	118	104
Foreign share of budgets ($M)	214	240	225	137	144	86	117	150	138	144
Total budgets ($M)	355	419	356	316	258	196	210	286	256	248
Number of projects	**31**	**43**	**34**	**41**	**35**	**29**	**41**	**40**	**38**	**39**
FRENCH-LANGUAGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	33	11	12	11	12	9	22	33	17	11
Foreign share of budgets ($M)	47	43	42	37	39	20	59	54	34	17
Total budgets ($M)	80	54	55	47	51	28	81	87	51	28
Number of projects	**17**	**10**	**21**	**12**	**9**	**7**	**12**	**17**	**10**	**11**
ALL LANGUAGES	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	174	190	144	190	126	119	115	169	138	119
Foreign share of budgets ($M)	262	283	268	174	184	106	176	204	181	167
Total budgets ($M)	436	473	411	364	310	224	291	373	320	285
Number of projects	**48**	**53**	**55**	**53**	**44**	**36**	**53**	**57**	**55**	**54**

Source:
Telefilm Canada.
Note:
Some totals may not sum due to rounding. Statistics as of September 2025.
*Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).
**Figures for all languages in 2023/24 and 2024/25 include other languages.

Both majority and minority-Canadian treaty coproductions declined in 2024/25, although to a greater extent for majority-Canadian productions.

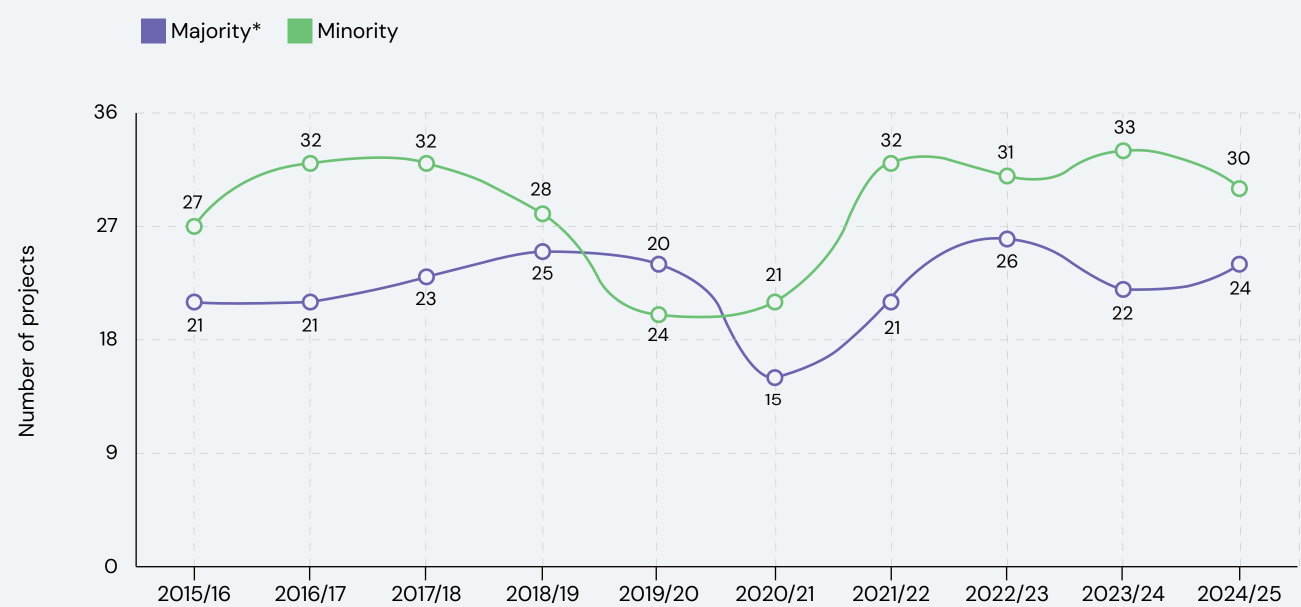
Exhibit 6-3 Audiovisual treaty coproduction, majority- vs. minority-Canadian production



Source:
Telefilm Canada.
Note:
Statistics as of September 2025.
* The statistics for majority-Canadian treaty coproduction includes projects where the Canadian share of spending was equal to or more than 50% of the total project budget.

The number of majority-Canadian treaty coproduction projects rose slightly, while the number of minority-Canadian coproductions declined by three in 2024/25.

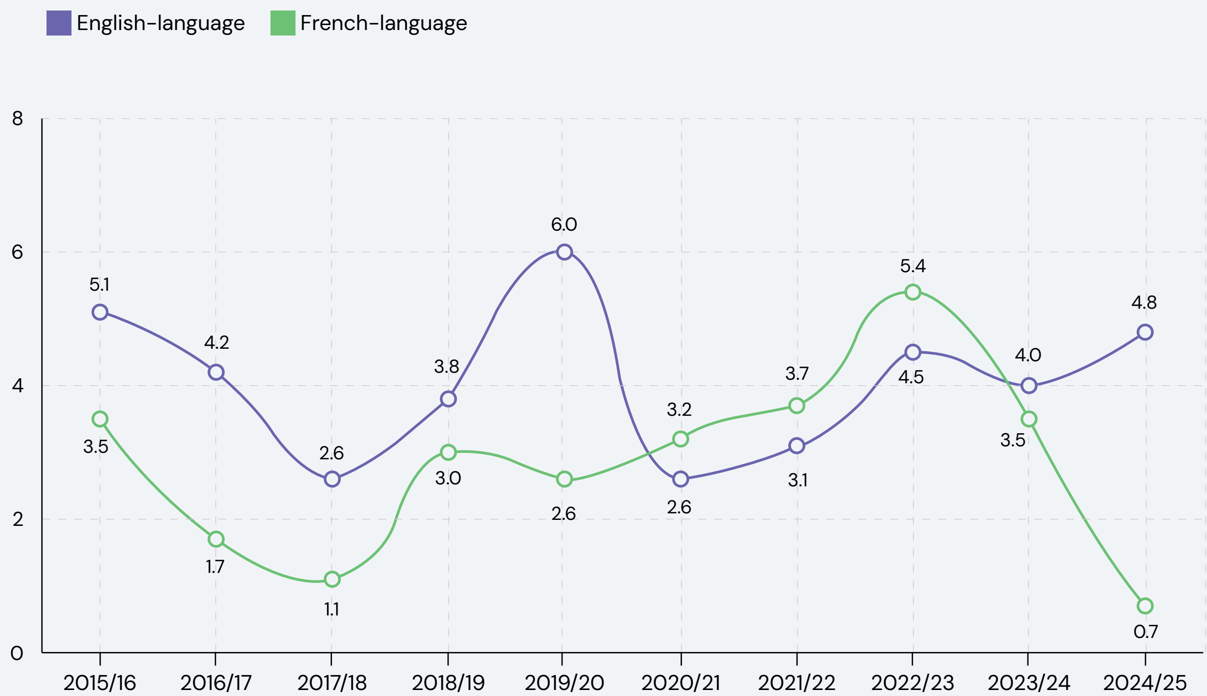
Exhibit 6-4 Audiovisual treaty coproduction, majority- vs. minority-Canadian production



Source:
Telefilm Canada.
Note:
Statistics as of September 2025.
* The statistics for majority-Canadian treaty coproduction includes projects where the Canadian share of spending was equal to or more than 50% of the total project budget.

The median project budgets of Canadian audiovisual treaty coproductions declined for French-language projects, from $3.5 million to less than $1 but rose for English-language by $0.8 million. By medium, the median feature film project budget increased by $1.2 million between 2023/24 and 2024/25, and by $0.1 million for television projects.

Exhibit 6-5 Audiovisual treaty coproduction, median project budgets, by language ($ millions)



Audiovisual treaty coproduction, median project budgets, by medium ($ millions)

Source:
Telefilm Canada.
Note:
Statistics as of September 2025.

The UK and France continued to be Canada's leading coproduction partners between 2015/16 and 2024/25.

Exhibit 6-6 Audiovisual treaty coproduction partner countries, 2015/16-2024/25

	NUMBER OF PROJECTS	TOTAL GLOBAL BUDGETS ($ MILLIONS)	CANADIAN SHARE OF TOTAL GLOBAL BUDGETS ($ MILLION)	CANADIAN SHARE OF TOTAL GLOBAL BUDGETS (%)
France	121	795	307	39
United Kingdom	98	629	306	49
Ireland	38	686	237	35
Germany	28	155	75	49
Belgium	22	170	92	54
Australia	18	118	59	50
Israel	18	47	31	67
New Zealand	17	85	31	37
Italy	13	44	14	32
Switzerland	10	31	16	52
Hungary	9	150	69	46
South Africa	8	41	17	42
Other Bipartite	65	224	119	53
Multipartite	43	311	110	35
Total	**508**	**3,487**	**1,484**	**43**

Source:
Telefilm Canada.
Note:
Some totals may not sum due to rounding. Statistics as of September 2025. The numbers of the countries listed above do not include participation in multipartite coproductions.
* Multipartite production includes audiovisual treaty coproduction projects where Canada has two or more partner countries.

6.2 Television

Audiovisual treaty production

In the television sub-segment, English-language treaty coproduction decreased to $82 million in total budgets, while French-language treaty coproduction decreased to $0 in total budgets. Overall, including coproductions in other languages, treaty coproduction decreased to $83 million in total budgets. There was also a decrease in the total number of projects.

Exhibit 6-7 Audiovisual treaty coproduction, volume*, and number of projects, by language, television segment

ENGLISH-LANGAUGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	107	97	87	76	46	68	40	61	31	33
Foreign share of budgets ($M)	176	174	192	63	99	56	66	89	75	49
Total budgets ($M)	282	271	279	139	145	124	106	150	106	82
Number of projects	**23**	**26**	**20**	**18**	**15**	**23**	**19**	**22**	**16**	**16**
FRENCH-LANGAUGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	2	7	7	4	3	n/a**	n/a**	n/a**	4	0
Foreign share of budgets ($M)	3	19	11	13	3	n/a**	n/a**	n/a**	5	0
Total budgets ($M)	4	25	17	17	6	5	5	11	9	0
Number of projects	**4**	**8**	**16**	**5**	**4**	**3**	**1**	**1**	**4**	**0**
ALL LANGAUGES	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	108	104	94	80	49	69	42	63	35	34
Foreign share of budgets ($M)	178	193	202	76	102	60	70	98	80	49
Total budgets ($M)	287	297	296	156	151	129	111	161	115	83
Number of projects	**27**	**34**	**36**	**23**	**19**	**26**	**20**	**23**	**20**	**17**

Source:
Telefilm Canada.
Note:
Some totals may not sum due to rounding. Statistics as of September 2025.
* Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).
**Figures are supressed due to the low number of projects in French-language production.

Looking at the television sub-segment by category, all categories saw a decline in the overall volume of projects in 2024/25.

Exhibit 6-8 Audiovisual treaty coproduction, volume* and number of projects, by category, television segment

TOTAL BUDGETS ($ MILLIONS)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Drama (fiction)	185	222	223	52	98	35	24	48	34	32
Documentary	23	35	33	45	18	33	14	48	25	16
Children's and youth	78	39	40	58	35	60	73	65	56	35
Total	**287**	**297**	**296**	**156**	**151**	**129**	**111**	**161**	**115**	**83**
NUMBER OF PROJECTS	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Drama (fiction)	5	7	4	2	6	6	5	6	4	4
Documentary	16	21	27	16	8	14	7	13	10	9
Children's and youth	6	6	5	5	5	6	8	4	6	4
Total	**27**	**34**	**36**	**23**	**19**	**26**	**20**	**23**	**20**	**17**
AVERAGE PROJECT BUDGETS ($ MILLIONS)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Drama (fiction)	37.1	31.7	55.8	26.1	16.3	5.1	4.8	8	8.5	8
Documentary	1.5	1.7	1.2	2.8	2.2	2.3	2	3.7	2.5	1.8
Children's and youth	13	6.5	8	11.7	7	9.1	9.1	16.3	9.3	8.7
All genres	**10.6**	**8.7**	**8.2**	**6.8**	**7.9**	**4.6**	**5.6**	**7**	**5.8**	**4.9**

Source:
Telefilm Canada.
Note:
Some totals may not sum due to rounding. Statistics as of September 2025.
* Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).

UK and France continued to be Canada's leading coproduction partners between 2015/16 and 2024/25. The UK was the leading television treaty coproduction partner.

Exhibit 6-9 Audiovisual treaty coproduction partner countries, television segment, 2015/16-2024/25

	NUMBER OF PROJECTS	TOTAL GLOBAL BUDGETS ($ MILLIONS)	CANADIAN SHARE OF TOTAL GLOBAL BUDGETS ($ MILLION)	CANADIAN SHARE OF TOTAL GLOBAL BUDGETS (%)
United Kingdom	72	434	204	47
France	58	250	95	38
Ireland	19	526	134	26
Australia	15	107	56	52
New Zealand	14	53	16	30
Germany	13	20	8	41
Israel	6	21	15	71
Belgium	5	55	28	51
Hungary	4	106	48	46
South Africa	4	24	7	28
Other Bipartite	20	68	30	44
Multipartite	15	121	36	30
Total	**245**	**1,785**	**677**	**38**

Source:
Telefilm Canada.
Note:
Some totals may not sum due to rounding. Statistics as of September 2025.
* Multipartite production includes audiovisual treaty coproduction projects where Canada has two or more partner countries.

6.3 Feature film

Audiovisual treaty production

In the feature film sub-segment, English-language treaty coproduction increased to $166 million in total budgets, while French-language treaty coproduction decreased to $28 million in total budgets. Overall, including coproductions in other languages, treaty coproduction decreased to $203 million in total budgets. There was, however, a slight increase in the total number of projects.

Exhibit 6-10 Audiovisual treaty coproduction, volume* and number of projects, by language, theatrical feature film segment

ENGLISH-LANGIAGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	35	82	44	104	68	42	53	75	86	70
Foreign share of budgets ($M)	39	66	34	74	45	30	50	61	64	96
Total budgets ($M)	73	148	78	178	113	72	104	135	150	166
Number of projects	**8**	**17**	**14**	**23**	**20**	**6**	**22**	**18**	**22**	**23**
FRENCH-LANGUAGE	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	31	6	7	9	8	21	31	13	11	n/a
Foreign share of budgets ($M)	45	32	24	36	16	56	46	29	17	n/a
Total budgets ($M)	76	37	30	45	24	76	77	42	28	29
Number of projects	**13**	**5**	**7**	**5**	**4**	**11**	**16**	**6**	**11**	**2**
ALL LANGUAGES**	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Canadian share of budgets ($M)	66	87	50	110	77	50	74	106	103	85
Foreign share of budgets ($M)	83	90	65	98	82	46	106	106	102	118
Total budgets ($M)	149	177	115	208	159	96	180	212	205	203
Number of projects	**21**	**19**	**19**	**30**	**25**	**10**	**33**	**34**	**35**	**37**

Source:
Telefilm Canada.
Note:
Some totals may not sum due to rounding. Statistics as of September 2025.
* Volume of coproduction refers to the value of total global budgets for coproduction projects. The total volume of production includes the financial participation of Canadian producers (i.e. Canadian share of budgets) and foreign producers (i.e. foreign share of budgets).
**Coproductions in other languages are included in the totals for all languages.
n/a: Figures are supressed due to the low number of projects in French-language production.

The UK and France continued to be Canada's leading coproduction partners between 2015/16 and 2024/25. France was the leading partner for feature films.

Exhibit 6-11 Audiovisual treaty coproduction partner countries, theatrical feature film segment, 2015/16-2024/25

	NUMBER OF PROJECTS	TOTAL GLOBAL BUDGETS ($ MILLIONS)	CANADIAN SHARE OF TOTAL GLOBAL BUDGETS ($ MILLION)	CANADIAN SHARE OF TOTAL GLOBAL BUDGETS (%)
France	63	545	212	39
United Kingdom	26	195	102	52
Ireland	19	160	103	64
Belgium	17	115	63	55
Germany	15	135	67	50
Israel	12	26	16	64
Italy	10	15	6	43
Switzerland	9	30	16	52
Hungary	5	44	21	47
Cuba	4	13	9	72
Greece	4	33	16	48
Netherlands	4	19	6	34
South Africa	4	17	11	62
Other Bipartite	43	165	84	51
Multipartite	28	191	74	39
Total	**263**	**1,702**	**807**	**47**

Source:
Telefilm Canada.
Note:
Statistics as of September 2025. Some totals may not sum due to rounding. The numbers of the countries listed above do not include participation in multipartite coproductions.
* Multipartite production includes audiovisual treaty coproduction projects where Canada has two or more partner countries.

7 Foreign location and service production

The foreign location and service (FLS) production segment is primarily comprised of films and television programs filmed in Canada mainly by foreign producers with the involvement of Canadian-based service providers. This includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs. For almost all FLS projects (97%), the copyright is held by non-Canadian producers.

Canada has also become a destination for the filming of many television series commissioned by US studios, networks or subscription video on demand (SVOD) services. Some recent series include the latest seasons of *IT: Welcome to Derry*, *The Last of Us*, *Doc* and *Happy Face*.

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

Highlights from 2024/25

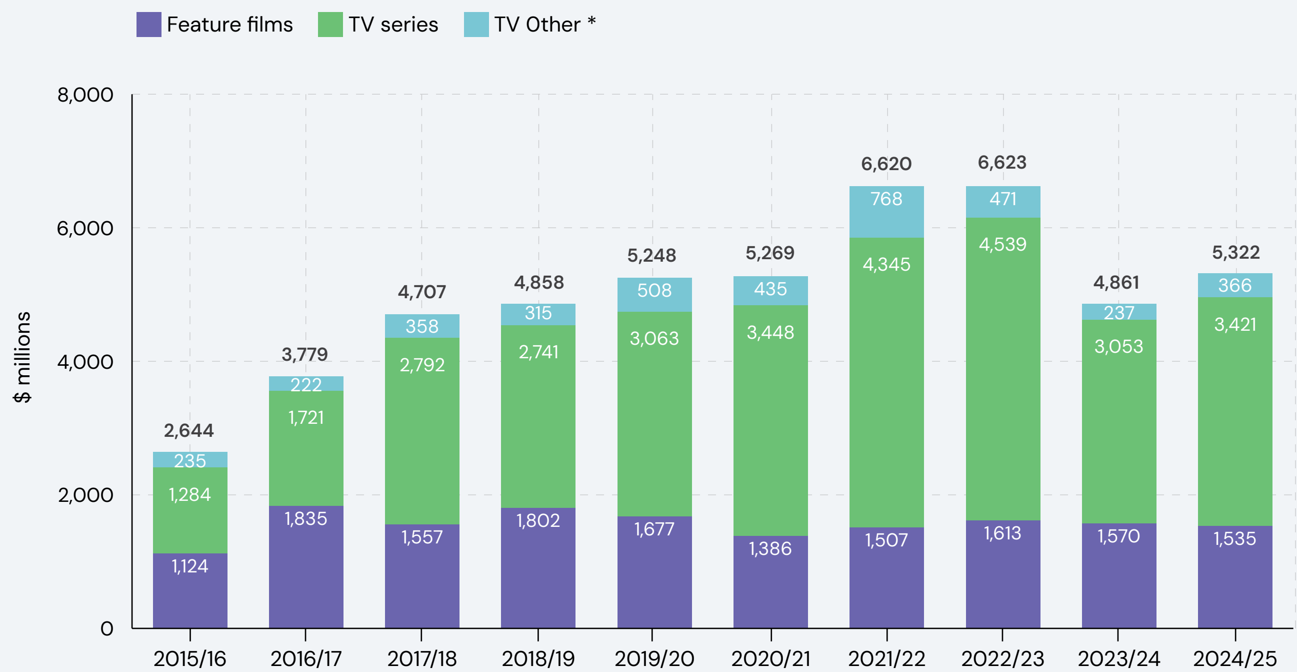
- The total volume of FLS production in Canada increased by 9.5% from $4.86 billion to $5.32 billion.
- This growth was driven by the total volume of FLS television series production increasing by 12.1% to $3.42 billion and the total volume of other [22] FLS television production increasing by 54.4% to $366 million.
- The total increase was slightly offset by a decrease of 2.2% in the total volume of FLS feature film production to $1.54 billion.
- While the total volume increased, the total number of FLS productions decreased from 490 to 460. There were decreases in the number of FLS productions across all types in 2024/25.
- The vast majority of the volume of FLS production in 2024/25 remained in British Columbia, Ontario and Quebec, representing 40%, 30% and 22% of the total respectively.
- The volume of FLS animation production increased from $837 million to $1.03 billion in 2024/25, although the number of projects declined from 129 to 98.
- While total volume increased in most FLS production segments, these results are coming off significant decreases in production last year. As a result of two major multi-month strikes in 2023, FLS production had declined by 26.6% in 2023/24. As such, production levels for 2024/25, while increased, are still lower than they were in 2021/22 and 2022/23.

[22] Other television production includes television movies, specials, pilots and other single-episode programming. It excludes mini-series, which are counted in the television series category.

7.1 Total production and types

Foreign location and service production

Exhibit 7-1 Volume of foreign location and service production, by type



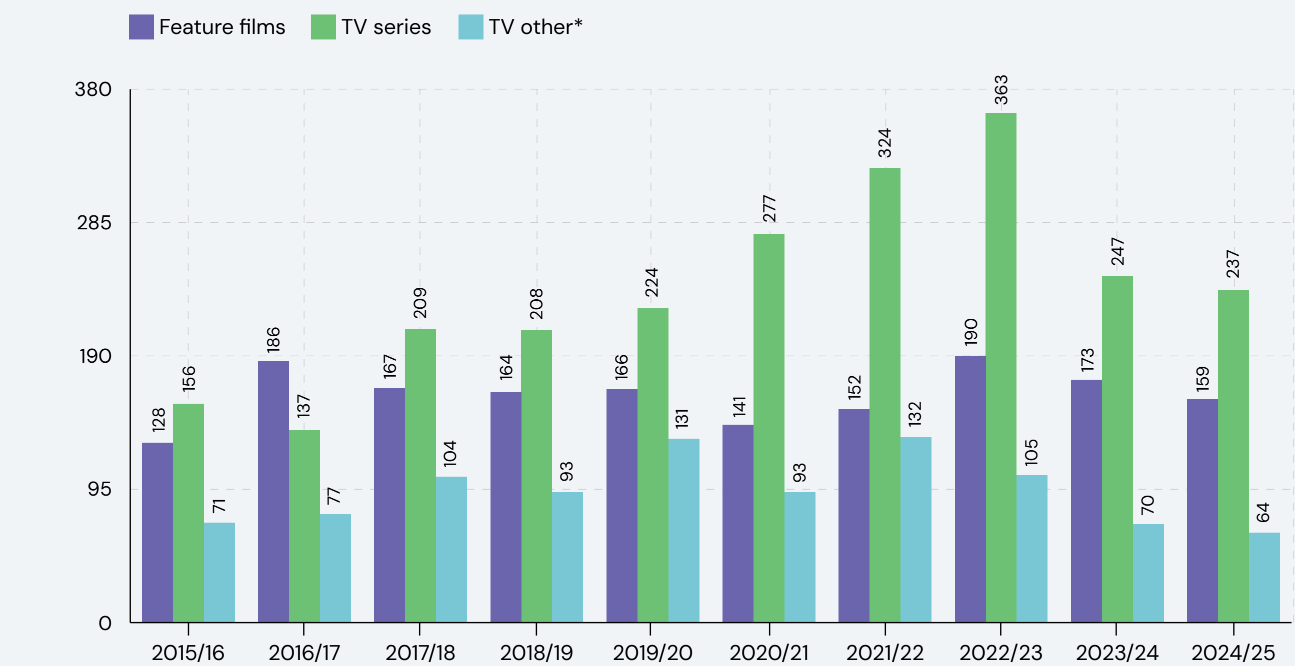
Source:
Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.
* Includes TV movies, specials, pilots and other single-episode programming. Prior to 2017/18, mini-series were included as part of the TV other category. In 2017/18, the statistics for mini-series were collected in the TV series category. For this reason, the year-over-year growth in TV series production in 2017/18 is slightly overstated. However, the vast majority of production in the TV series category is still likely comprised of TV series rather than TV mini-series.

Volume of foreign location and service production, by type, annual growth 2024/25

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024/25
Feature films	1,570	-35	-2.2
TV series	3,053	368	12.1
TV other*	237	129	54.4
Total	**4,861**	**461**	**9.5**

Source:
Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.
* Includes TV movies, specials, pilots and other single-episode programming. Prior to 2017/18, mini-series were included as part of the TV other category. In 2017/18, the statistics for mini-series were collected in the TV series category. For this reason, the year-over-year growth in TV series production in 2017/18 is slightly overstated. However, the vast majority of production in the TV series category is still likely comprised of TV series rather than TV mini-series.

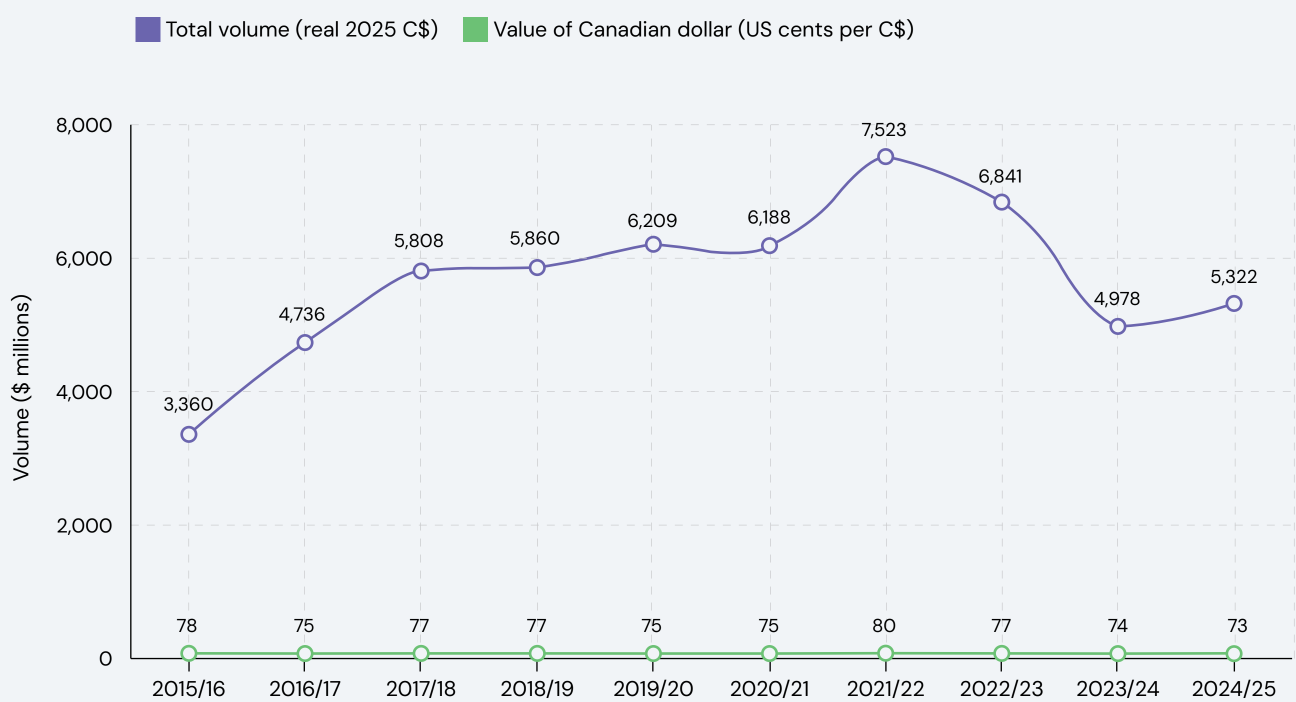
Exhibit 7-2 Annual number of foreign location and service projects, by type



Source:
Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.
* Includes TV movies, specials, pilots and other single-episode programming. Prior to 2017/18, mini-series were included as part of the TV other category. In 2017/18, the statistics for mini-series were collected in the TV series category. For this reason, the year-over-year growth in TV series production in 2017/18 is slightly overstated. However, the vast majority of production in the TV series category is still likely comprised of TV series rather than TV mini-series.

The total volume of FLS production increased in real inflation-adjusted dollars in 2024/25, while the value of the Canadian dollar decreased.

Exhibit 7-3 Total volume of foreign location and service (FLS) production (real inflation-adjusted dollars vs. value of Canadian dollar)



Source:
Bank of Canada, Statistics Canada and Association of Provincial Television and Film Agencies.

7.2 Region

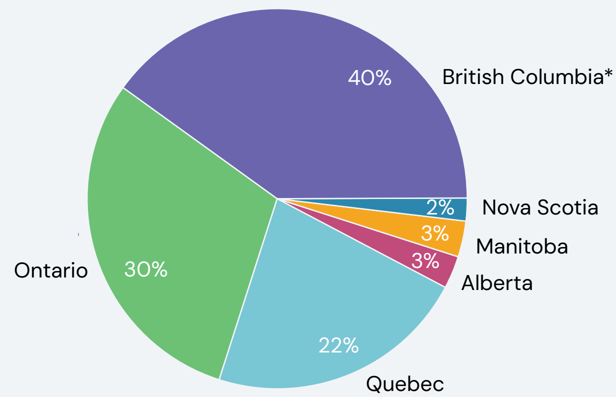
Foreig location and service production

Exhibit 7-4 a) Volume of foreign location and service production, by province and territory ($ millions)

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
British Columbia*	1,574	2,311	3,040	2,816	2,347	2,719	2,879	2,677	1,811	2,127
Ontario	698	882	869	985	1,541	1,426	1,672	1,981	1,283	1,594
Quebec	282	404	666	771	1,142	922	1,421	1,540	1,418	1,192
Alberta	34	54	31	86	0	68	441	244	193	161
Manitoba	42	70	89	167	171	84	105	60	67	148
Nova Scotia	12	39	12	26	40	46	91	118	80	99
Newfoundland and Labrador	0	0	0	0	0	0	8	0	5	4
Territories**	3	18	1	7	8	4	3	4	4	4
Saskatchewan	0	0	0	1	0	0	0	0	0	0
New Brunswick	0	0	0	0	0	n/a	0	0	0	0
Prince Edward Island	0	0	0	0	0	n/a	0	0	0	0
Total	**2,644**	**3,779**	**4,707**	**4,858**	**5,248**	**5,269**	**6,620**	**6,623**	**4,861**	**5,322**

Source:
Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Please see Notes on methodology for additional information.
n/a: Data not available or suppressed for confidentiality.
* Beginning in 2021/22, Creative BC started reporting production activity and spending on the basis of the fiscal year in which principal photography or key animation started. Prior to 2021/22, Creative BC recorded production activity and spending in the fiscal year within which a project's tax credit application received approval. For that reason, the annual production statistics between 2020/21 and 2021/22 may not be directly comparable.
** Yukon, Nunavut and Northwest Territories.

Exhibit 7-4 b) Volume of foreign location and service production, by province and territory, share 2024/25



Source:
Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. Please see Notes on methodology for additional information.
Newfoundland and Labrador and the Territories (Yukon, Nunavut and Northwest Territories) each contain less than 1% of the total share.
* Beginning in 2021/22, Creative BC started reporting production activity and spending on the basis of the fiscal year in which principal photography or key animation started. Prior to 2021/22, Creative BC recorded production activity and spending in the fiscal year within which a project's tax credit application received approval. For that reason, the annual production statistics between 2020/21 and 2021/22 may not be directly comparable.

7.3 Country

Foreign location and service production

The number of FLS products decreased overall by 30 projects, largely due to decreases of 27 and 5 projects where copyright was issued in the US and other foreign countries respectively. The shares of each jurisdiction group remained relatively similar to 2023/24.

Exhibit 7-5 Number of foreign location and service projects, by country of copyright

NUMBER OF PROJECTS	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
US	261	304	365	365	409	404	527	575	425	398
Other foreign	67	73	78	69	72	73	55	66	52	47
Canada*	27	24	38	31	40	35	28	17	13	15
Total	**355**	**400**	**480**	**465**	**521**	**511**	**610**	**658**	**490**	**460**

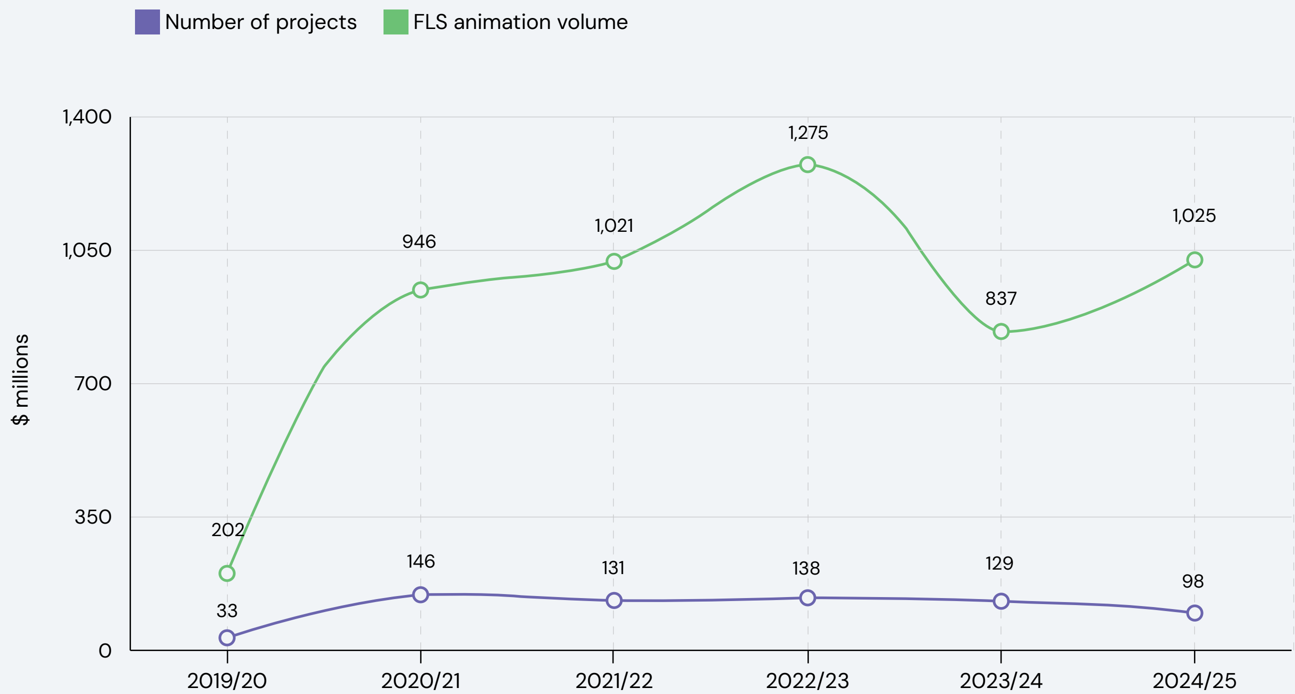
PERCENTAGE OF TOTAL (%)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
US	74	76	76	78	79	79	86	87	86	87
Other foreign	18	18	16	15	13	14	9	10	11	10
Canada*	8	6	8	7	8	7	5	3	3	3
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source:
Association of Provincial Television and Film Agencies.
Note:
Note: Some totals may not sum due to rounding.
* Canadian projects in the FLS segment include projects made by Canadian producers primarily for foreign audiences, or as part of international co-ventures. International co-venture production includes films and television programs made as international coproductions, but outside of the auspices of an audiovisual coproduction treaty.

7.4 Animation

Foreign location and service production

Exhibit 7-6 Total volume and the number of projects of FLS animation production



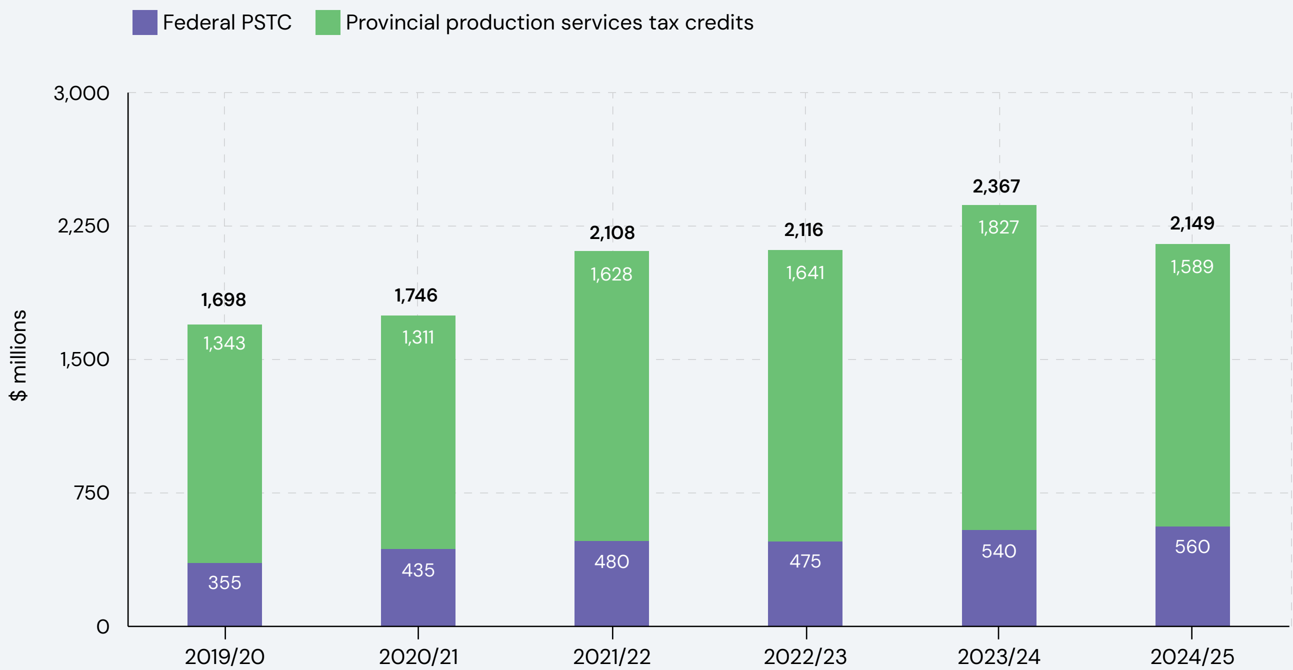
Source:
Association of Provincial Television and Film Agencies.
Note:
Some totals may not sum due to rounding.

7.5 Tax credit financing

Foreign location and service production

Unlike Canadian content, the Canadian Audio-Visual Certification Office (CAVCO) does not also provide detailed information regarding the sources of financing for FLS productions. However, information regarding tax credits is available from various federal and provincial government reports. In 2024/25, the federal and provincial governments in Canada provided an estimated $2.15 billion in refundable production services tax credits to FLS production. This included $560 million from the federal government's Production Services Tax Credit (PSTC) and $1.59 billion from provincial government production services tax credits and rebates for FLS productions.

Exhibit 7-7 Estimated federal and provincial tax credits for FLS production



Source:
Estimates based on data from Federal Department of Finance Budget 2025, Ontario Creates, Government of British Columbia Public Accounts, Institut de la statistique du Québec, and Association of Provincial Television and Film Agencies.

8 Broadcaster in-house production

Broadcaster in-house production ("in-house production") refers to television programs produced internally by private conventional television broadcasters, public broadcasters, as well as discretionary and on-demand services. In-house production largely consists of news and sports programming, but may also include production in other categories.

The statistics presented in this section cover the 2024 broadcasting year, which runs from September 1, 2023 to August 31, 2024.

Highlights from 2024

- The total volume of broadcaster in-house production increased by 5.3%, reaching $1.23 billion.
- Spending on in-house production by discretionary and on-demand services declined by 1.2% to $558 million.
- Spending on the in-house production of news programming increased by 1.9% to $743 million.
- Conventional broadcasters' spending on in-house production rose by 11.5% to $670 million.
- Spending on the in-house production of sports programming increased significantly by 33.1% to $342 million.
- The overall increase in production volume, including growth among conventional broadcasters and in sports programming, reflects the additional spending associated with coverage of the 2024 Summer Olympic Games in Paris.

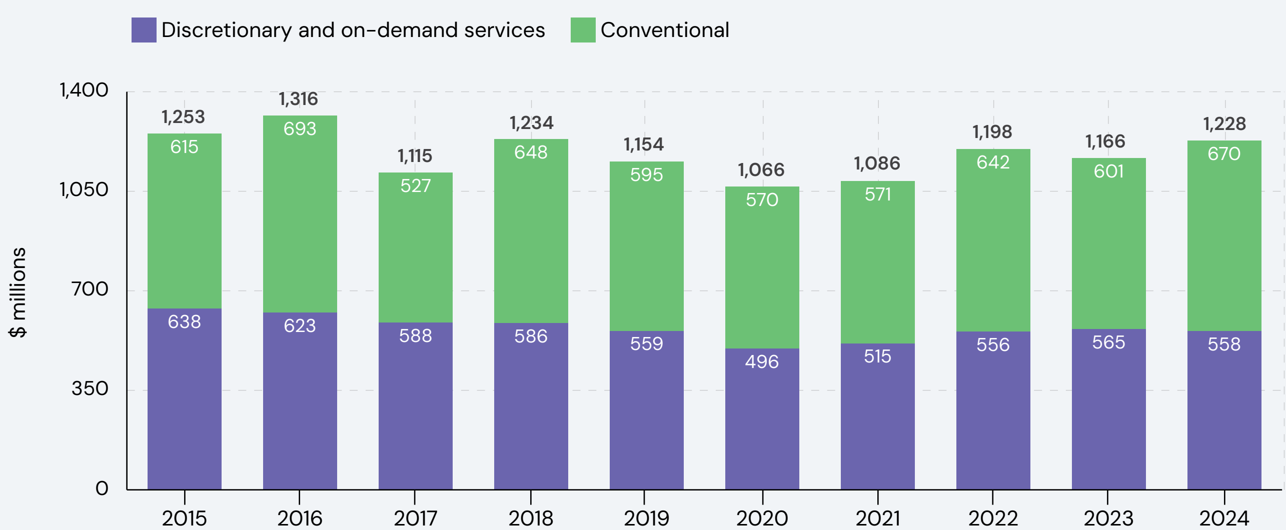
8.1 Production volume

Broadcaster in-house production

The total volume of in-house production increased by 5.3% in 2024 - from $1.17 billion in 2023 to $1.23 billion in 2024. Within the discretionary and on-demand services sub-segment, spending was down by 1.2% to $558 million. Within the conventional television sub-segment (including private conventional broadcasters, CBC/Radio-Canada and provincial educational broadcasters), spending increased by 11.5% to $670 million.

The share of total volume of in-house production was split 45-55 between the conventional television sub-segment and the discretionary and on-demand services.

Exhibit 8-1 Volume of broadcaster in-house production, by sub-segment



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

Volume of broadcaster in-house production, by sub-segment, annual growth 2024

	2023 ($M) TOTAL	GROWTH ($M) 2024	GROWTH (%) 2024
Discretionary and on-demand services	565	-7	-1.2
Conventional	601	69	11.5
Total	**1,166**	**62**	**5.3**

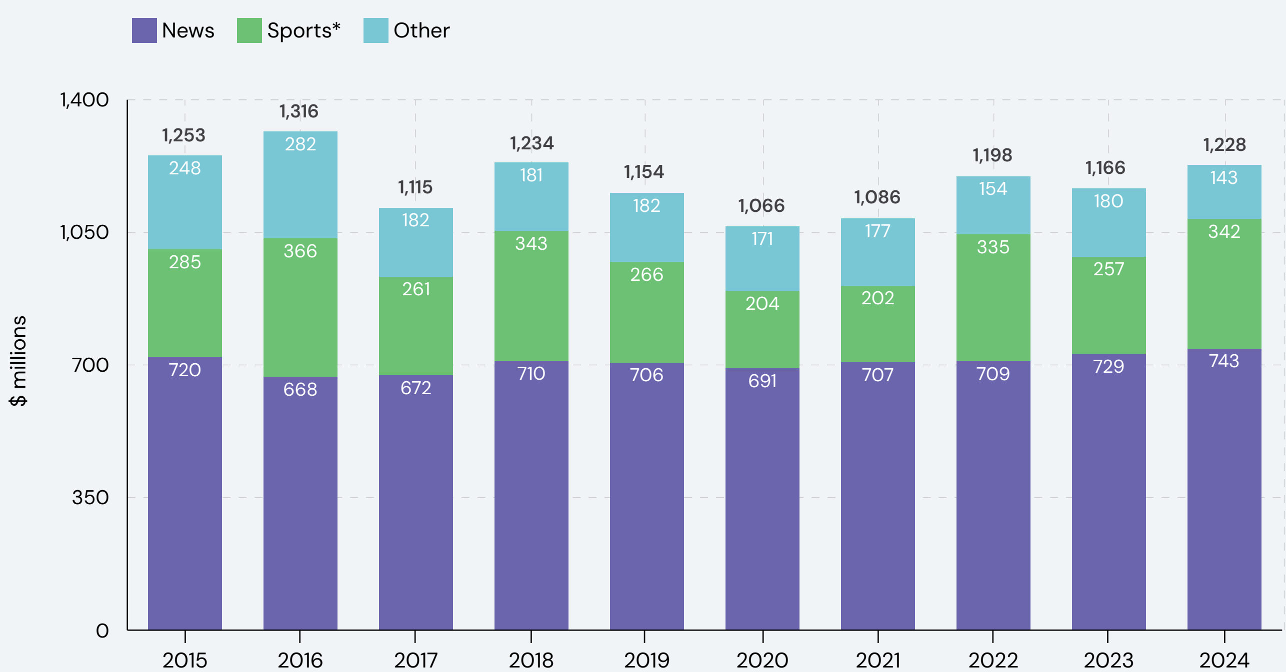
Source:
Estimates based on data collected from CRTC.
Note:
Some totals may not sum due to rounding.

8.2 Categories

Broadcaster in-house production

The total volume of broadcaster in-house production was split by category as follows; 61% news spending, 28% sports and 12% other categories. Spending on the in-house production of sports programming increased by $85 million, or 33.1% and spending on the in-house production of news programming also increased slightly, by $14 million or 1.9%.

Exhibit 8-2 Volume of broadcaster in-house production, by category



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

Volume of broadcaster in-house production, by category, annual growth 2024

	2023/24 ($M) TOTAL	GROWTH ($M) 2024/25	GROWTH (%) 2024
News	729	14	1.9
Sports*	257	85	33.1
Other	180	-37	-20.6
Total	**1,166**	**62**	**5.3**

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

8.3 Region

Broadcaster in-house production

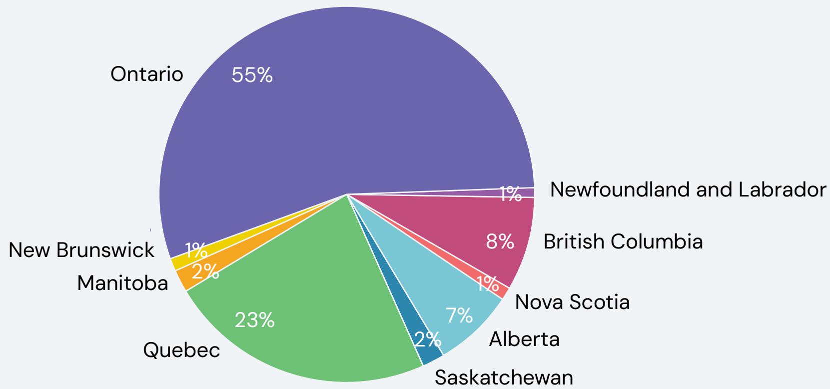
Broadcaster in-house production remained very concentrated in Ontario and Quebec in 2024. These two provinces, which are home to the vast majority of Canada's television broadcasting industry, accounted for 79% of Canada's total volume of broadcaster in-house production.

Exhibit 8-3 a) Volume of broadcaster in-house production, by province and territory

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Ontario	677	729	612	686	622	570	571	669	628	685
Quebec	279	307	258	296	272	247	257	287	279	283
Alberta	94	88	80	83	87	85	85	82	88	88
British Columbia	97	96	87	87	89	80	81	79	86	88
Manitoba	30	28	25	26	27	26	33	26	27	27
Saskatchewan	27	24	20	20	21	21	21	20	21	22
Nova Scotia	26	23	16	17	18	17	18	17	17	17
New Brunswick	11	10	8	9	9	9	10	9	9	9
Newfoundland and Labrador	9	8	7	7	7	7	8	7	8	8
Prince Edward Island	2	2	1	1	1	2	2	1	2	2
Territories*	2	1	1	1	1	1	1	1	1	1
Total	**1,253**	**1,316**	**1,115**	**1,234**	**1,154**	**1,066**	**1,086**	**1,198**	**1,166**	**1,228**

Source:
Sources: Estimates based on data collected from CRTC, CBC/Radio-Canada and Statistics Canada.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. See Notes on methodology for additional information. * Yukon, Nunavut and Northwest Territories.

Exhibit 8-3 b) Volume of broadcaster in-house production, by province and territory, 2024



Source:
Estimates based on data collected from CRTC, CBC/Radio-Canada and Statistics Canada.
Note:
Some totals may not sum due to rounding. Statistics published by provincial funding agencies may differ from those in *Profile 2025*. See Notes on methodology for additional information.
Prince Edward Island and the Territories (Yukon, Nunavut and Northwest Territories) each contain less than 1% of the total share.

9 Distribution

Canada's distribution industry includes both Canadian-controlled and foreign-controlled companies that distribute film and television content through movie theatres, television broadcasters, the wholesaling of physical media and other video platforms. Leading Canadian-controlled distribution companies include Elevation Pictures and Immina Films, as well as the distribution divisions of Canadian independent production companies such as Cineflix Media. Foreign-controlled distribution companies operating in Canada include the distribution arms of major Hollywood studios.

Note: As of 2011, Statistics Canada publishes data for the audiovisual distribution industry on a biennial basis only. As a result, industry revenue data are not available for 2016, 2018, 2020, 2022 and 2024. The most recent year for which revenue data have been published is 2023. Data on distributor investment in Canadian film and television production are sourced from the Canadian Audio-visual Certification Office (CAVCO) and are available on an annual fiscal-year basis.

Highlights from 2023 and 2024/25

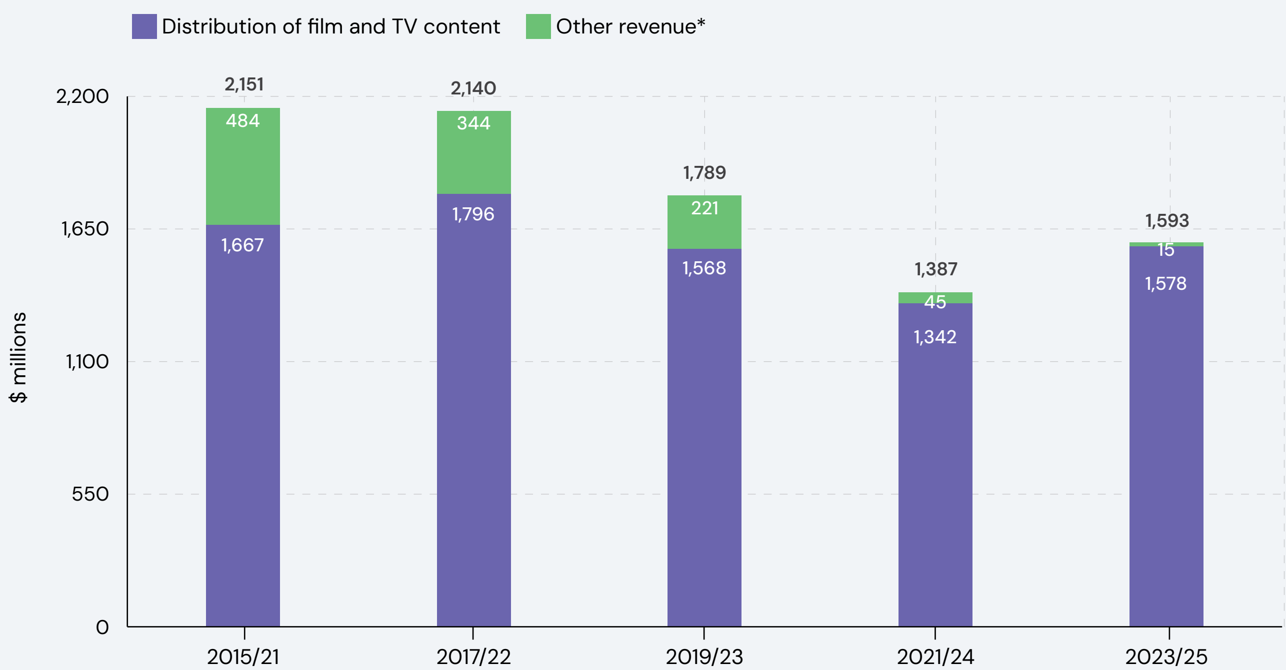
- Total revenue for the Canadian distribution industry increased by 14.9% between 2021 and 2023, reaching $1.59 billion.
- Revenue from the distribution of Canadian films and television programs increased by 3.2% in 2023 (compared with 2021), totalling $230 million.
- Sales of Canadian films and television programs to foreign markets increased by 16.7% in 2023 (compared with 2021), reaching $126 million.
- Revenue generated from the distribution of Canadian films and television programs represented 14.4% of total industry revenue in 2023, down from 16.1% in 2021.
- Canadian distributors' investment in Canadian films and television programs increased by 16.2% in 2024/25 (compared with 2023/24), and totalled $449 million.

9.1 Revenue

Distribution

Based on the most recently published data from Statistics Canada, total revenue of the Canadian audiovisual distribution industry increased by 14.9% between 2021 and 2023 to a total of $1.59 billion.

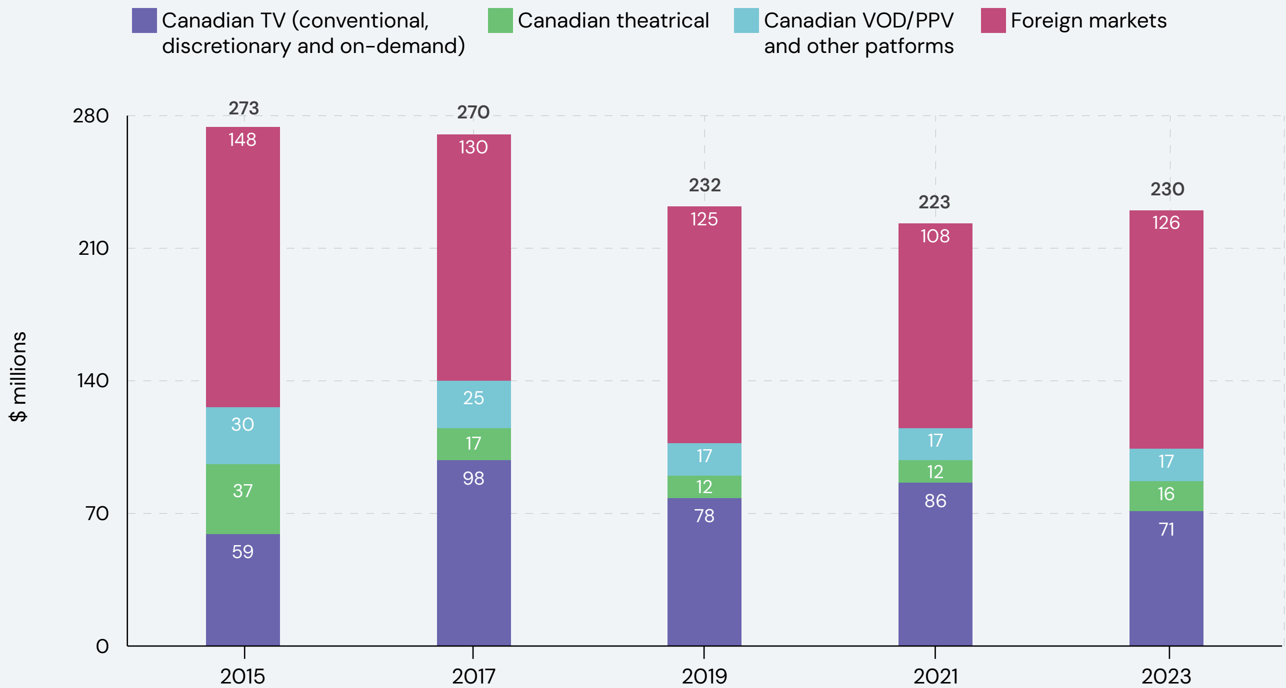
Exhibit 9-1 Total revenue in the Canadian distribution industry



Source:
Statistics Canada, Table 21-10-0075-01.
Note:
Beginning with 2013, Statistics Canada adopted a new methodology for measuring total revenue in the film and video distribution industry. For that reason, the figures reported before and after 2012 may not be directly comparable for the purpose of time-series analysis.
n/a: No data available. As of 2011, Statistics Canada only publishes data on a biennial basis. For that reason, no data is available for 2016, 2018, 2020, 2022 and 2024.
* Includes revenue from the wholesaling of pre-recorded video, production of audiovisual works for outright sale, contract production of audiovisual works, and other sources.

Revenue from the distribution of Canadian films and television programs increased by 3.2% in 2023 (compared with 2021) to a total of $230 million. This revenue accounted for 14.4% of total industry revenue in that year, down from 16.1% in 2021.

Exhibit 9-2 Revenue from the distribution of Canadian film and television content, by market



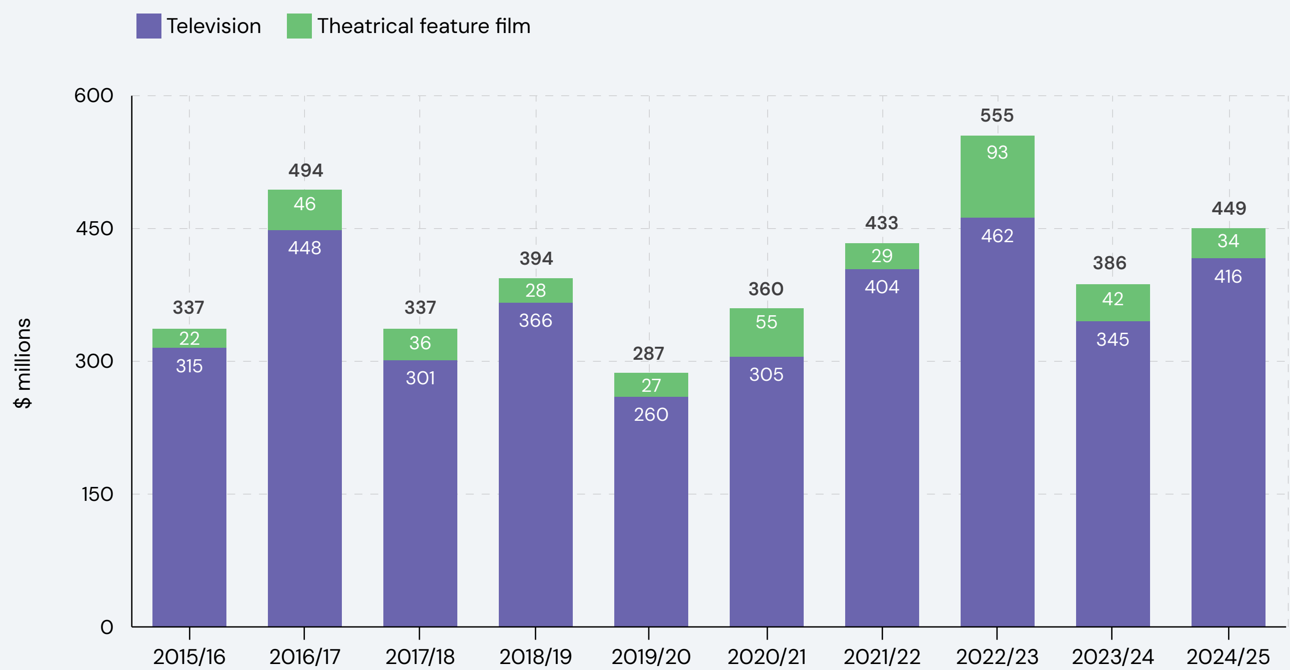
Source:
Statistics Canada, Table 21-10-0074-01.
Note:
Some totals may not sum due to rounding.
n/a: No data available.
* As of 2011, Statistics Canada only publishes data on a biennial basis. For that reason, no data is available for 2016, 2018, 2020, 2022 and 2024.

9.2 Investment in Canadian productions

Distribution

Canadian distributors' investment in Canadian films and television programs in 2024/25 increased by $63 million or 16.2% compared with 2023/24.

Exhibit 9-3 Canadian distributors' investment in Canadian film and television production



Source:
Estimates based on data obtained from CAVCO.
Note:
Some totals may not sum due to rounding.

10 Canadian television broadcasting

The Canadian television broadcasting industry consists of different sub-segments:

- The **private conventional television** sub-segment, which includes private broadcasters that maintain over-the-air infrastructure to broadcast to households.[23]
- Services in the **discretionary and on-demand** sub-segment are those that are only available via cable television, direct-to-home (DTH) satellite television or Internet protocol television (IPTV) providers.
- **Discretionary services** typically provide sports, news, movies, arts or thematic programming, and earn revenue from a combination of subscription fees and advertising. On-demand services include video-on-demand (VOD) services that earn revenue from subscription or transactional payments, rather than advertising.
- **Public broadcasting**, operating in either or both of the sub-segments above, include CBC/Radio-Canada, as well as the provincial educational broadcasters operating in Quebec, Ontario and British Columbia.

The Canadian Radio-television and Telecommunications Commission (CRTC) collects and publishes financial information reported by Canadian broadcasters operating in these sub-segments, both on an individual service as well as aggregated basis for designated large broadcast groups. Key information provided by the CRTC focuses on broadcasting revenues and contributions to the development and production of Canadian programming.

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

For Canadian private broadcasters, these contributions are calculated on the basis of prior year revenues. For CBC/Radio-Canada, they are instead calculated on the basis of total programming expenses in the current year.

Financial information is reported for the September to August broadcast year. At this point, the CRTC has only released the aggregated financial information reported by the large broadcast groups. It is current to the most recently completed broadcast year (2024/25). However, financial information for the total broadcasting industry has not yet been released. As such, that information is not as current as the aggregated broadcasting group data, and is limited to the 2023/24 broadcast year. That said, the large broadcaster groups make up more than 85% of industry totals. As such, current data for the large groups reflects the results and trends for the industry as a whole.

The information reported to the CRTC and outlined below is limited to linear television broadcasting. It does not include details about the revenues and CPE contributions from online services and/or online broadcasting activities, both from Canadian and foreign online services.

The CRTC is in the process of modernizing its regulatory framework. A key purpose of that review relates to the inclusion of online services as being part of the Canadian broadcasting system. In so doing, these services will also provide the CRTC with detailed financial information about their revenues and contributions to Canadian programming. As a result, in the coming years ahead, that information may also be published by the CRTC, and will likely form the basis of additional elements being reported and discussed in this chapter of the *Profile* report. In the interim, the CRTC has collected limited revenue information from online services and published industry-wide numbers, on an aggregated basis.

Highlights from 2023/24 for Broadcasting Industry Totals and from 2024/25 for Large Broadcaster Ownership Groups

- Broadcasting industry revenue declined by 2.2%, falling from $6.4 billion to $6.3 billion.
- Revenue decreases are more pronounced for large broadcast ownership groups, given they are limited to conventional, discretionary and on-demand services, and exclude all-sports services, who revenues have continued to trend upwards.
- For large English-language groups, revenues decreased by 10.7% in 2024/25. That decrease was 9.9% for private broadcaster groups (i.e., excluding the CBC).
- The same negative trend holds true for large French-language groups, with a decrease of 6.5% for all groups, and 7.0% for private groups (i.e., excluding Radio-Canada).
- CPE spending by the English-language private broadcaster groups decreased by 5.0% in 2024/25.
- Results were similar for large French-language groups, as CPE spending decreased by 12.3%.
- The broadcasting industry continues to face multi-year declines in both revenues and CPE spending across English and French language private broadcaster groups.

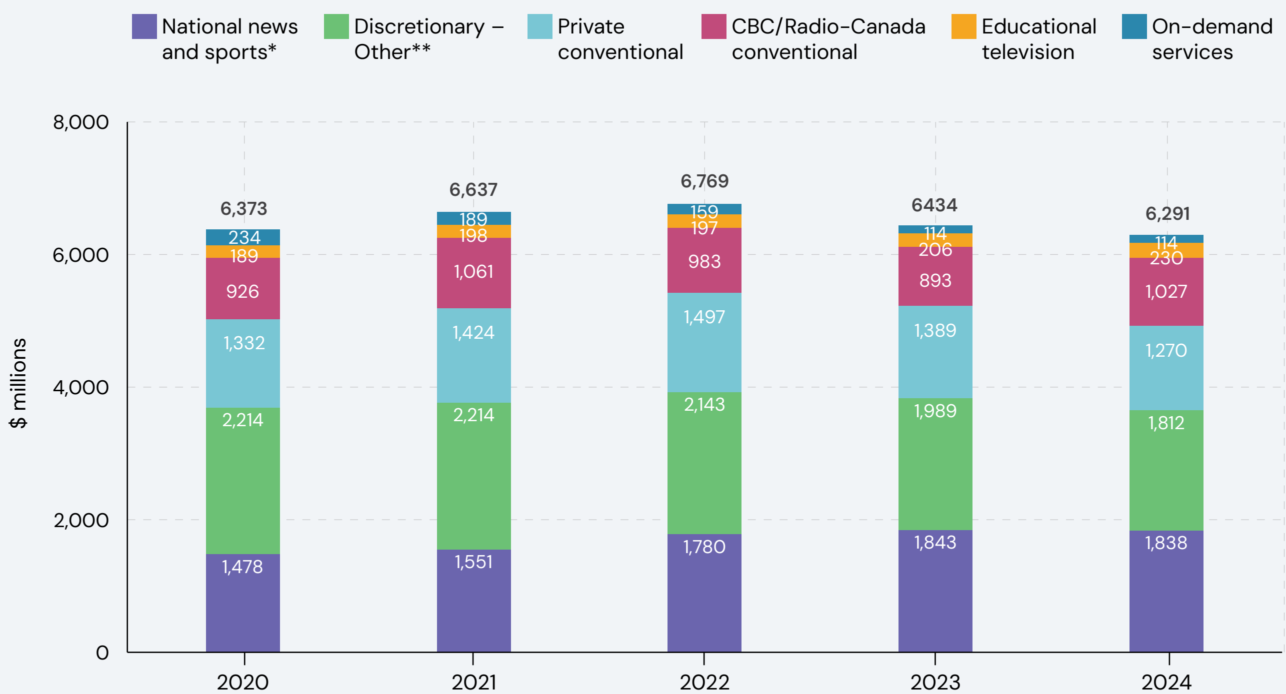
10.1 Revenues and Canadian programming expenditures (CPE)

Television broadcasting

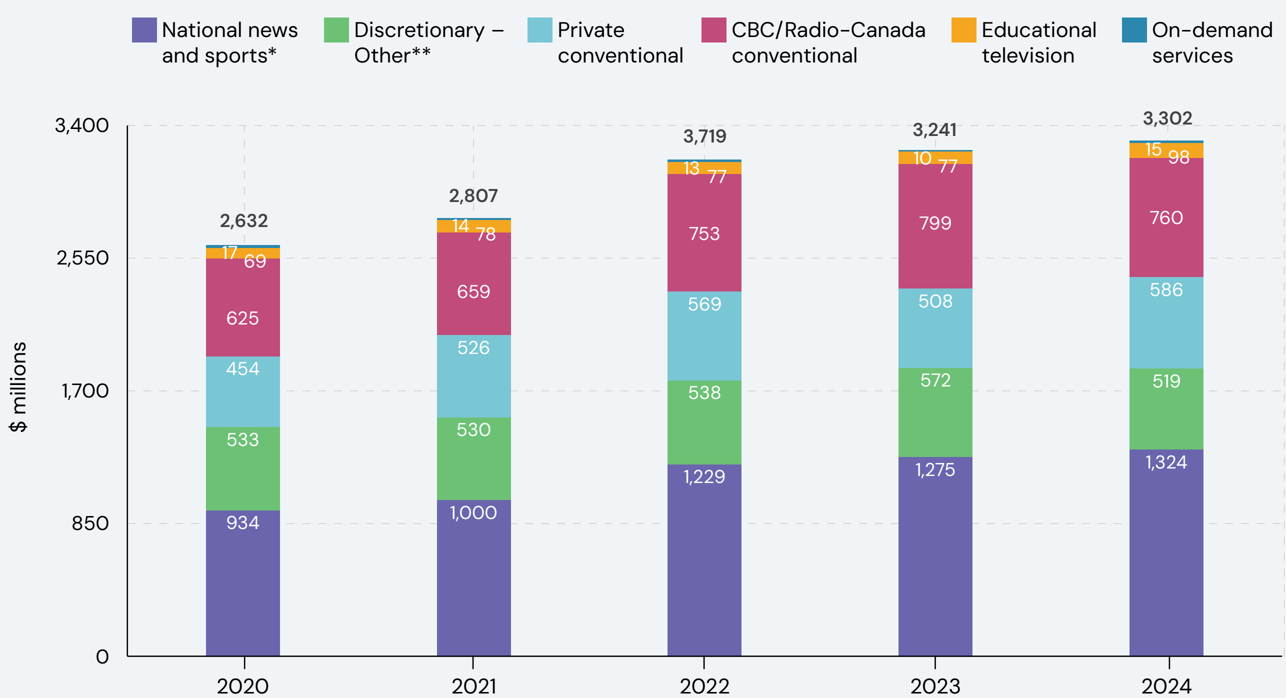
Lower revenue in almost every segment of Canada's broadcasting industry during the 2024 broadcasting year (September 1, 2023 to August 31, 2024) led to an overall decline in revenue, by 2.2% to $6.29 billion. In 2024, total industry revenues experienced the lowest level in the last five years, with revenues also having fallen by $478 million over the last two broadcast years.

Looking specifically at the discretionary services segment, overall revenues in 2023 decreased below $2 billion for the first time in five years, and continued that trend falling to $1.81 billion in 2024 (Exhibit 10-1).

Exhibit 10-1 Total revenues and CPE in the broadcasting industry, by service segment (total revenues)



Total revenues and CPE in the broadcasting industry, by service segment (CPE)

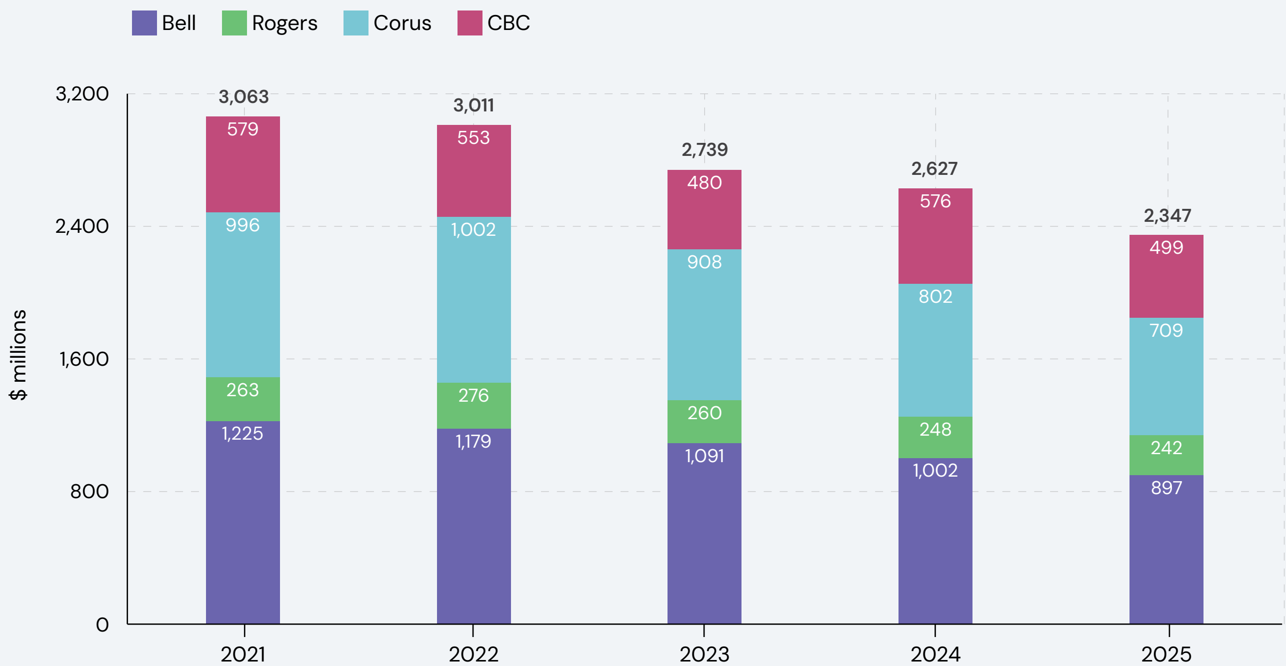


Source:
CMPA estimates based on data from the CRTC's 2024 Statistical and Financial Summaries.
Note:
Some totals may not sum due to rounding.
* Includes the following discretionary services: CTV News Channel, CBC News Network, LCN, ICI RDI, TSN, Sportsnet, Sportsnet One, RDS, TVA Sports, ESPN Classic.
** Includes revenue earned by discretionary services owned by CBC/Radio-Canada, other than National News services (i.e., CBC News Network and ICI RDI).

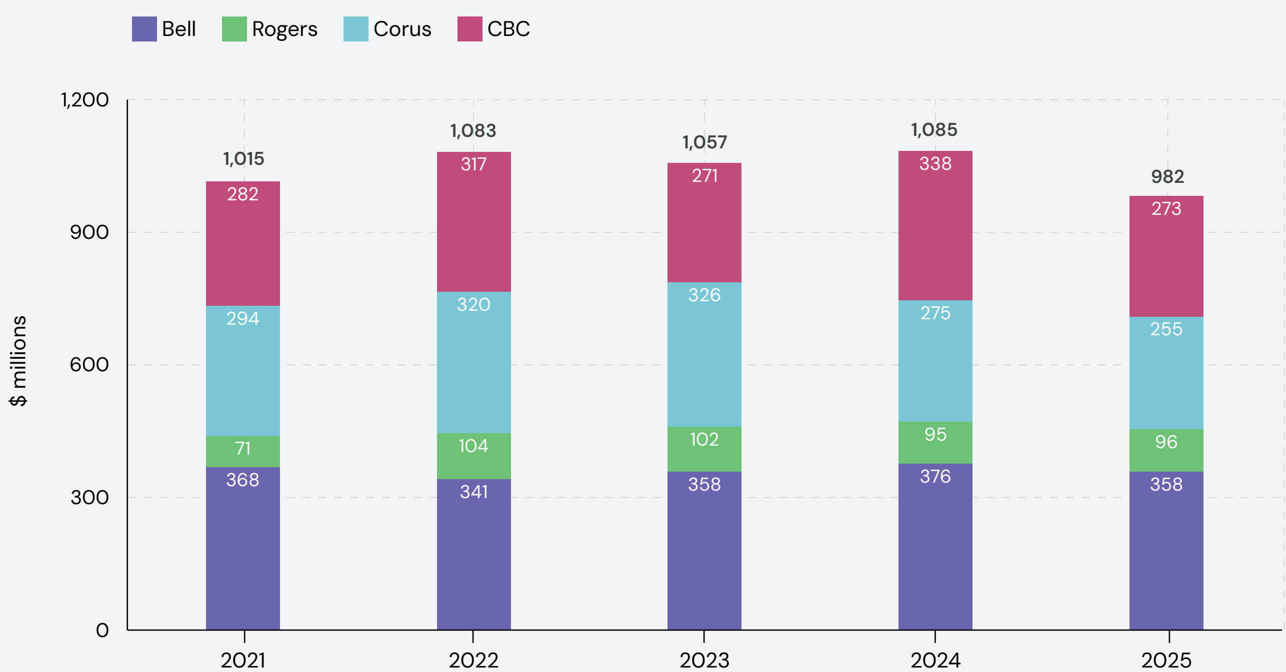
[23] The vast majority of Canadian households now receive conventional television signals via cable television, DTH satellite television or IPTV providers.

The data outlined below focuses on the large English- and French-language ownership groups. Current CPE requirements for large English-language private television ownership groups are set at 30% and include Bell Media Inc. (BCE), Corus Entertainment Inc. (Corus), and Rogers Media Inc. French-language private television ownership groups range from 26% to 45% and include Bell Media Inc. (BCE), Corus Entertainment Inc. (Corus), and Quebecor Media Inc (Quebecor).[24]

Exhibit 10-2 Total revenues and CPE by English-language broadcasting groups (revenues)



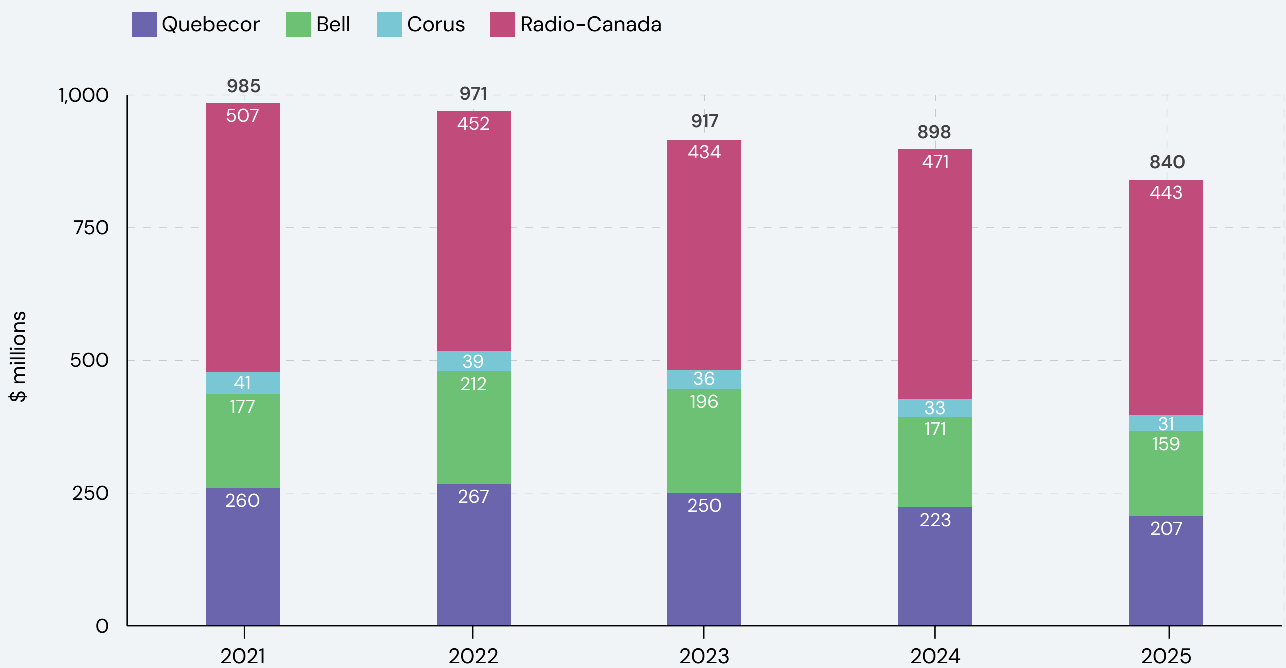
Total revenues and CPE by English-language broadcasting groups (CPE)



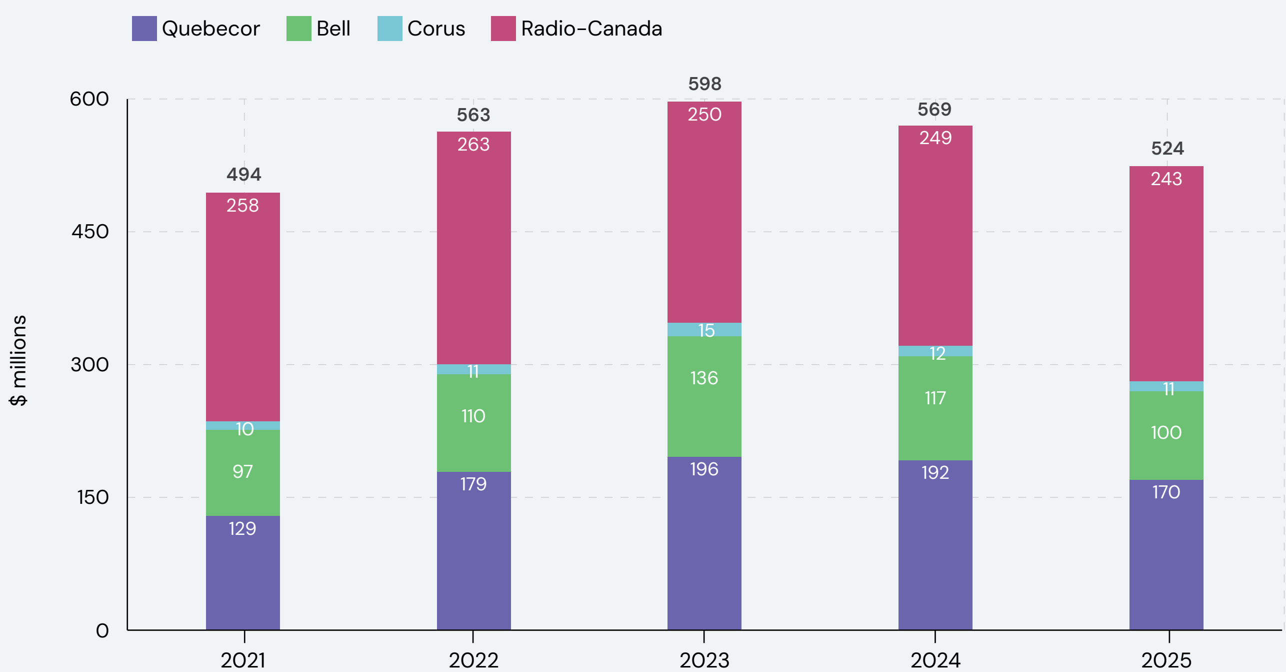
Source:
CRTC, data from the 2025 Aggregate Annual Returns filed by the Broadcasting Groups.
Note:
Some totals may not sum due to rounding.
English-language private broadcasting groups include: Bell, Rogers and Corus, designated groups.

[24] CRTC (2024). Broadcasting Notice of Consultation CRTC 2024-288.

Exhibit 10-3 Total revenues and CPE by French-language broadcasting groups (revenues)



Total revenues and CPE by French-language broadcasting groups (CPE)



Source:
CRTC, data from the 2025 Aggregate Annual Returns filed by the Broadcasting Groups.
Note:
Some totals may not sum due to rounding.
French-language private ownership groups include: Bell, Quebecor and Corus, designated groups.

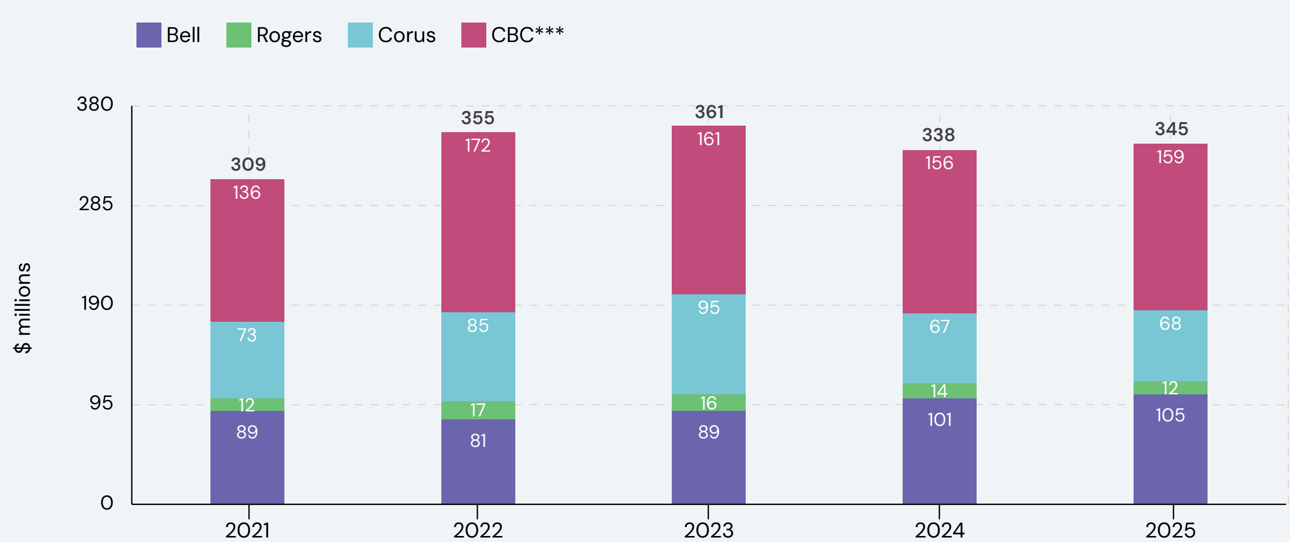
10.2 Programs of national interest (PNI) and independent production expenditures

Television broadcasting

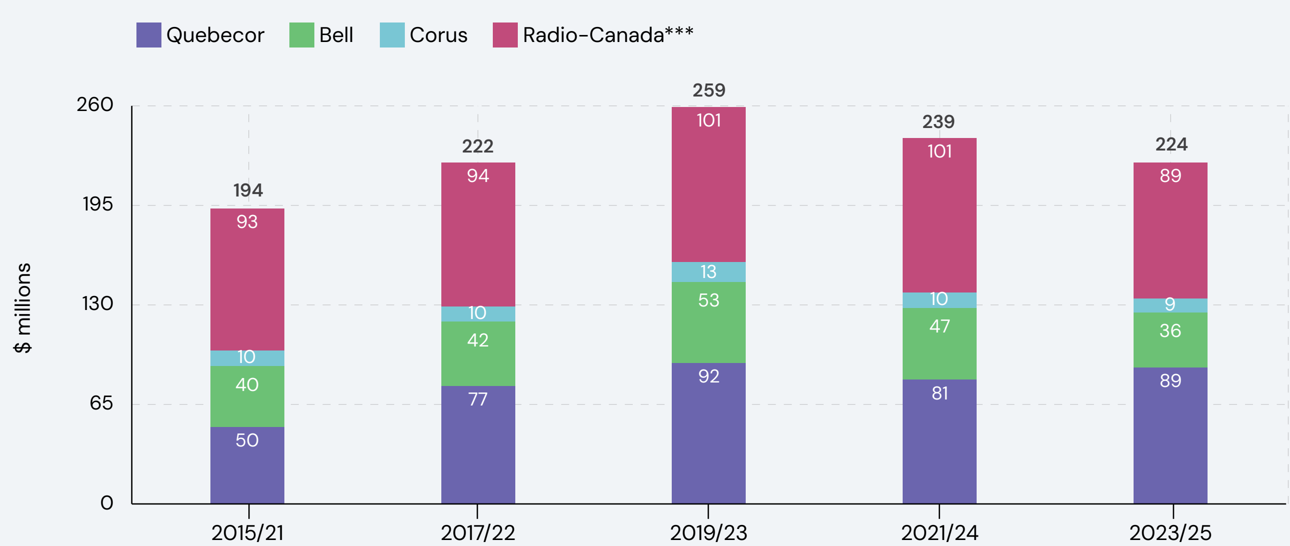
A subsection of CPE is known as programs of national interest (PNI), and therefore PNI spending counts towards broadcasters CPE requirements. PNI expenditures includes programming that has been identified as risky to produce and difficult to monetize. PNI in the English-language market include long-form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

For the large English-language private television ownership groups, the PNI requirements range from 5% to 7.5% of prior year revenues. For the large French-language private television ownership groups, they range from 15% to 18%.[25] At least 75% of the PNI spending requirement is to be produced by independent production companies.[26]

Exhibit 10-4 Spending on programs of national interest* (PNI), by English-language broadcasting groups**



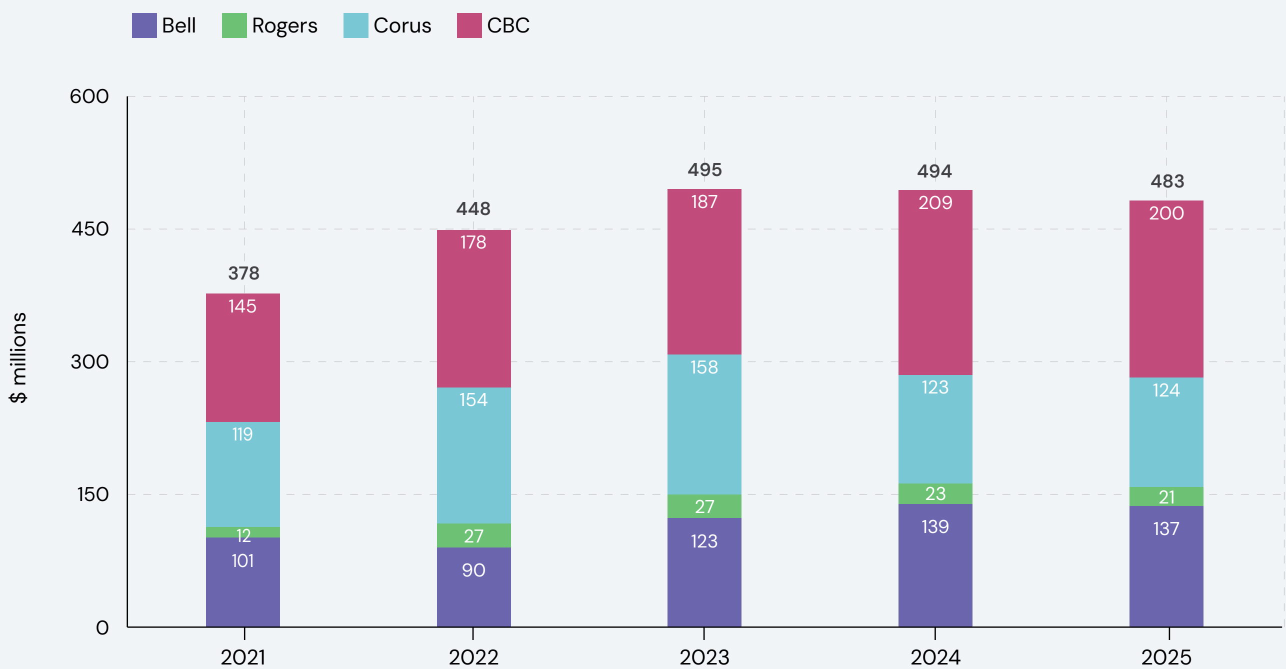
Spending on programs of national interest* (PNI), by French-language broadcasting groups**



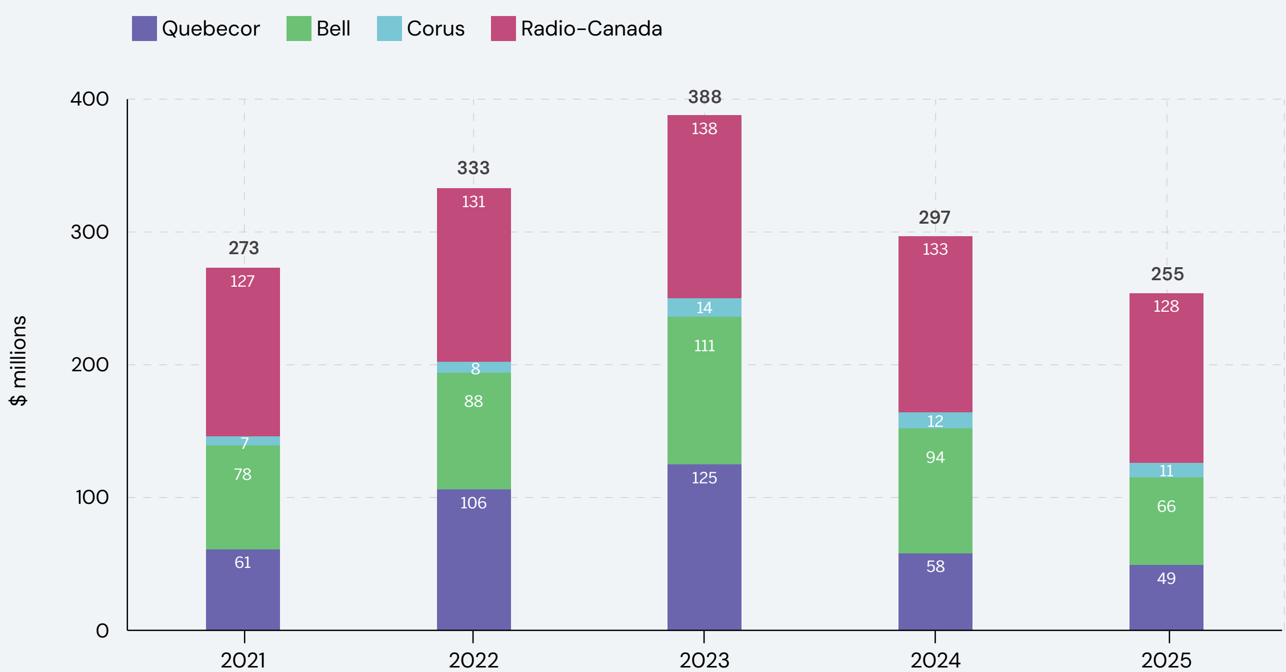
Source:
CRTC, data from the 2025 Aggregate Annual Returns filed by the Broadcasting Groups.
Note:
Some totals may not sum due to rounding.
*Includes Canadian drama and comedy; long-form documentary; English-language award shows; and French-language music, dance and variety programming.
**English-language private ownership groups include: Bell, Rogers and Corus, designated groups. French-language private ownership groups include: Bell, Quebecor and Corus, designated groups.
***PNI totals for CBC and Radio-Canada are estimates based in part on CRTC data and will also include expenditures from National News services (i.e., CBC News Network and ICI RDI).

[25] CRTC (2024). Broadcasting Notice of Consultation CRTC 2024-288.
[26] Ibid.

Exhibit 10-5 Spending on independent production, by English-language broadcasting groups*

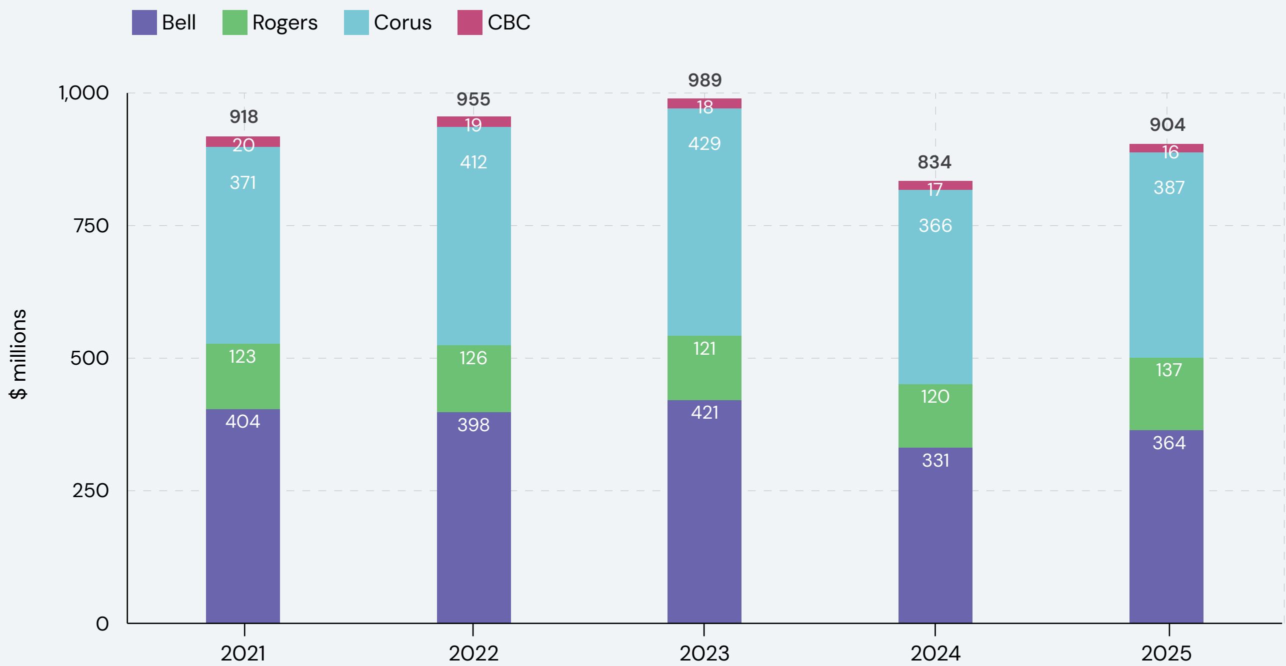


Spending on independent production, by French-language broadcasting groups*

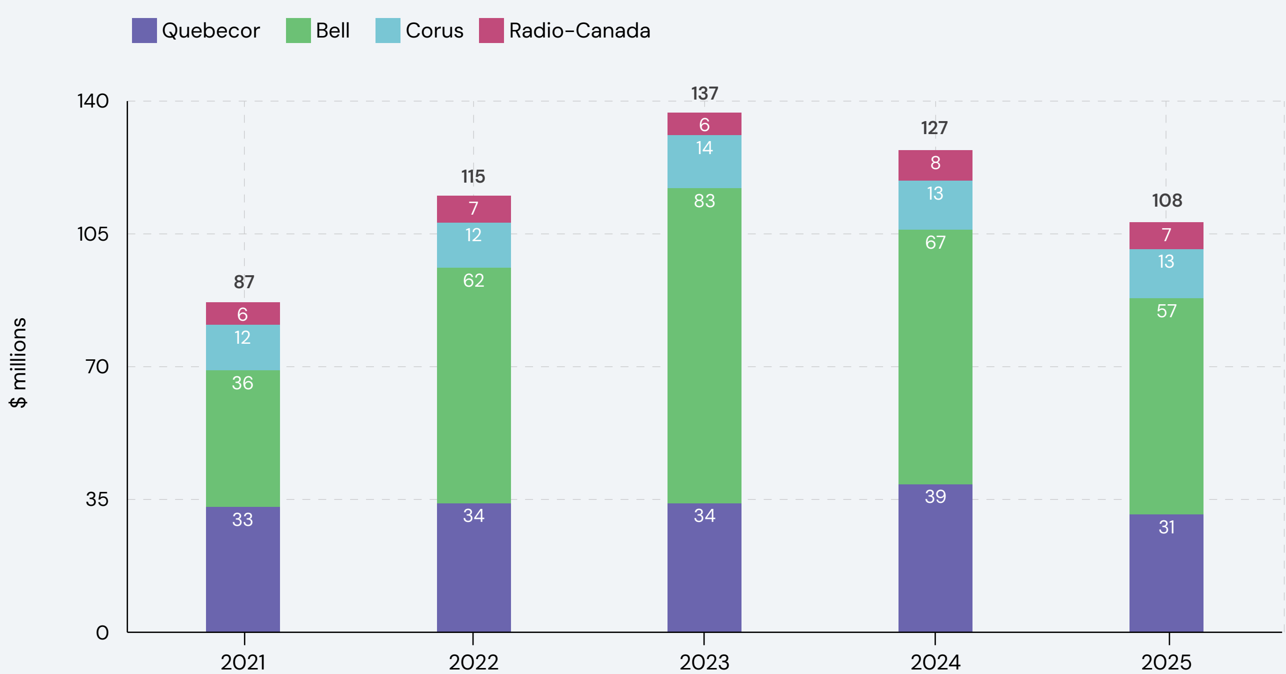


Source:
CRTC, data from the 2025 Aggregate Annual Returns filed by the Broadcasting Groups.
Note:
Some totals may not sum due to rounding.
*English-language private ownership groups include: Bell, Rogers and Corus, designated groups. French-language private ownership groups include: Bell, Quebecor and Corus, designated groups.

Exhibit 10-6 Spending on non-Canadian programming, by English-language broadcast group*



Spending on non-Canadian programming, by French-language broadcast group*



Source:
Source: CRTC, data from the Aggregate Annual Returns filed by the Broadcasting Groups.
Note:
Some totals may not sum due to rounding.
*English-language private ownership groups include: Bell, Rogers and Corus, designated groups. French-language private ownership groups include: Bell, Quebecor and Corus, designated groups.

11 Theatrical exhibition and audiences

The theatrical exhibition industry includes theatre chains, independent theatres and IMAX theatres that exhibit theatrical feature films. Despite the growth of online distribution platforms, theatrical exhibition remains an important release window for feature films in Canada. In 2024, there were 2,740 theatre screens and more than 64 million tickets sold in Canada, according to the most recent data published by Statistics Canada.[26] By comparison, more than 96 million tickets were sold in 2018, the most recent complete year of full operations prior to the COVID-19 pandemic.[27]

Highlights from 2024 & 2025

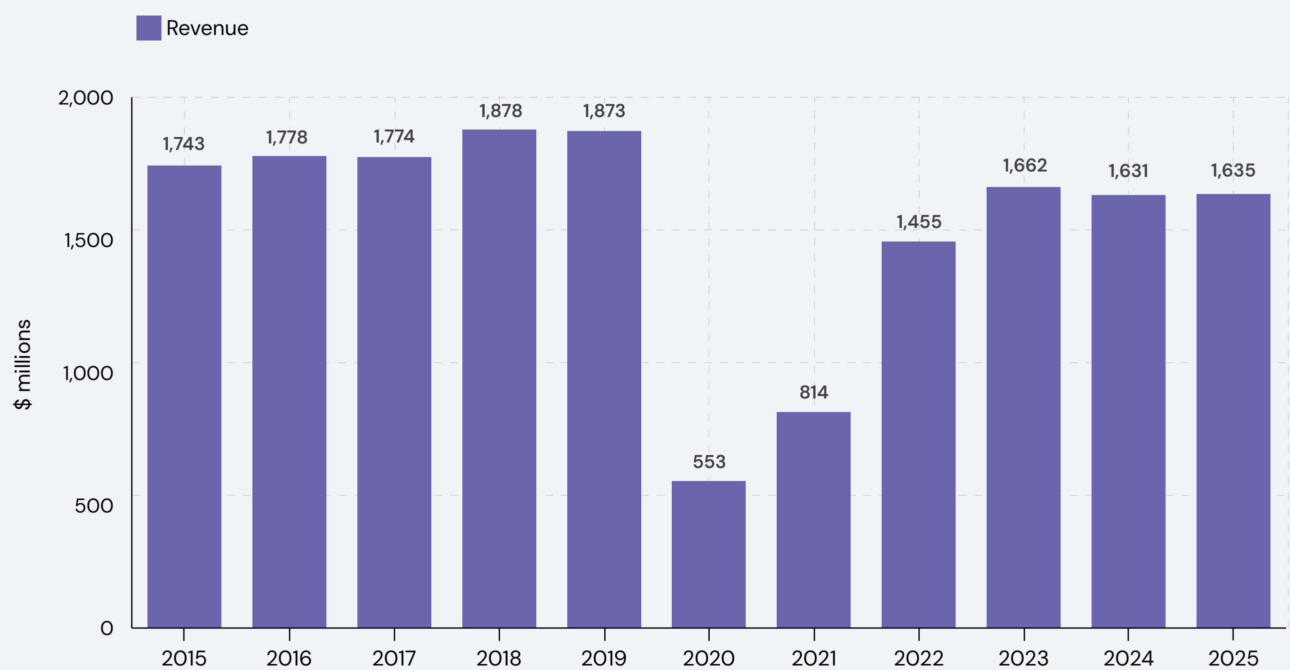
- Canadian new-release films' share of total new releases in Canadian theatres increased from 14.0% to 14.9 in 2024, but fell slightly to 14.6% in 2025.
- Theatrical exhibition industry revenue fell by 1.9% to $1.63 billion in 2024, but is estimated to have increased to $1.64 billion in 2025.
- Canadian films' share of the Canadian box office decreased from 3.3% in 2023 to 2.8% in 2024, before falling to 1.7% in 2025.
- Total box office receipts fell by 6.1% to $835 million, before rising slightly to $836 million in 2025
- Canadian films' box office revenue in Canada fell to $23.5 million in 2024, and then to $14.2 million in 2025, a 51.1% decline between 2023 and 2025.

11.1 Total revenue

Theatrical exhibition and audiences

Theatrical exhibition industry revenue fell by 1.9% in 2024 to $1.63 billion, and is estimated to have increased only slightly to $1.64 billion in 2025.

Exhibit 11-1 Total revenue in the theatrical exhibition industry in Canada

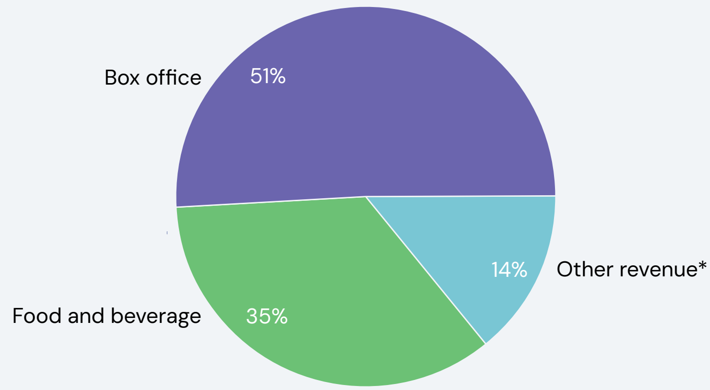


Source:
Nordicity estimates based on data from the Movie Theatre Association of Canada (MTAC), Statistics Canada, catalogue no. 87F0009X and table: 21-10-0178-01, and Cineplex Inc.
Note:
*Statistics for 2025 are not published by Statistics Canada and have been estimated.

[26] Statistics Canada (2023). Table 21-10-0180-01.
[27] Statistics Canada (2019). Table 21-10-0180-01.

Just over half of the Canadian theatrical exhibition industry's total revenue in 2024* was from ticket sales (i.e., box office), with 35% from food and beverage sales, and the remaining 14% from other sources.

Exhibit 11-2 Sources of revenue in the theatrical exhibition industry in Canada, 2024



Source:
Nordicity estimates based on data from the Movie Theatre Association of Canada (MTAC), Statistics Canada, catalogue no. 87F0009X, table: 21-10-0178-01 and table: 21-10-0181-01.
Note:
*Breakdown of revenue sourced from Statistics Canada for 2024 is the most recent year of published statistics for the theatrical exhibition industry.

**Includes revenue earned from sales of in-theatre advertising, other advertising sales, merchandise sales, private screenings and parties, and corporate events.

11.2 Film festivals

Theatrical exhibition and audiences

In recent years, many of the film festivals that traditionally acted as markets for the selling of independent productions to distributors have evolved into more sophisticated marketing and sales operations. Festivals are now often a means of building word-of-mouth and interest by actively cultivating audiences ahead of a theatrical release, as well as providing the forum for industry practitioners to engage with each other and filmmakers. During the COVID-19 pandemic, most festivals accelerated their pivoting towards digital engagement with audiences and delegates, either exclusively or in combination with live events. However, in 2023, most festivals resumed their live audience programming, while maintaining their digital programming as well.

In terms of the value chain that operates in the film and television sector, film festivals often play a key role in mediating the transactions between independent filmmakers and distributors and broadcasters. These significant economic benefits are mostly captured within the distribution and broadcasting segments of the value chain.

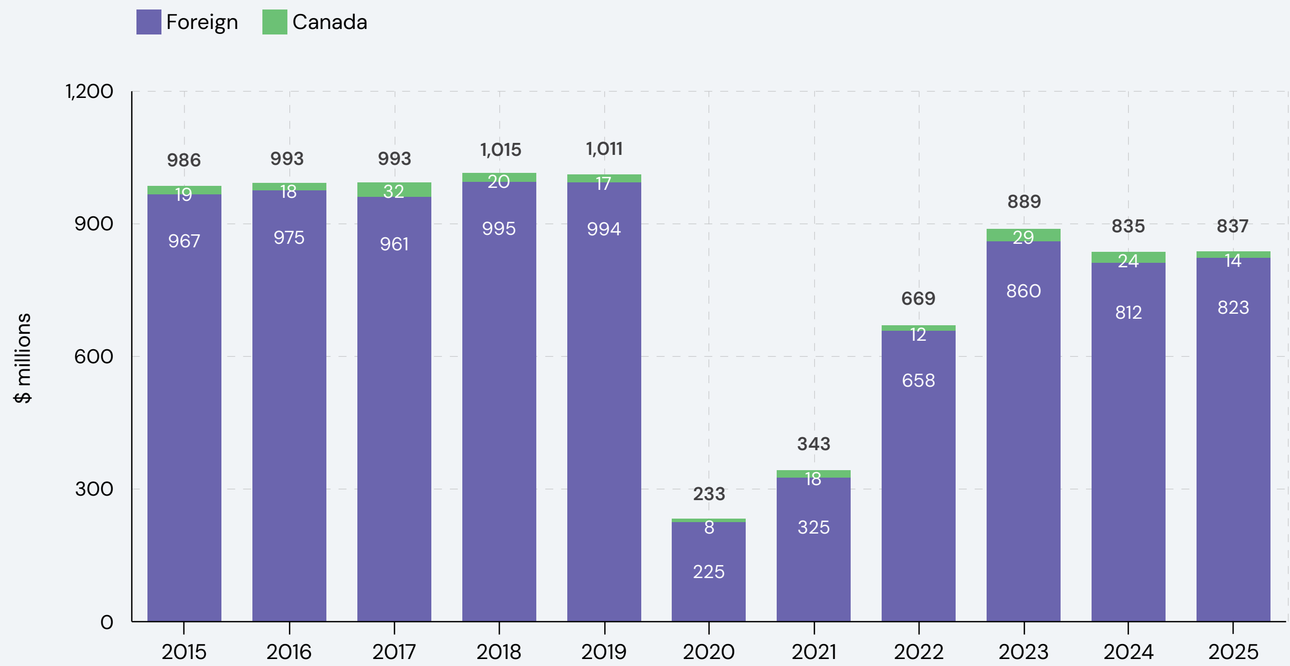
Film festivals continue to be an integral element of the film sector ecosystem, with hundreds spread all across Canada, covering a broad range of genres. There are genuinely global festivals such as the Toronto International Film Festival (TIFF), operating in the company of Cannes, Venice, and Sundance; world-leading specialist film festivals such as the Ottawa International Animation Festival, Hot Docs' Canadian International Documentary Festival, imagineNATIVE Film + Media Arts Festival; and popular genre festivals, such as Montreal's Fantasia International Film Festival, which continue to attract large audiences.

In 2024/25, as part of its support for the promotion of Canadian films, Telefilm Canada provided $7.3 million in financial support to 111 Canadian film festivals and 71 industry events and initiatives in Canada.[28] Of the 111 supported film festivals, 42 were in the regions[29] and 35 were focused on diversity and inclusion.[30] As part of $7.9 million in financial support for national and international promotional activities, Telefilm Canada also supported Canadian films screening or marketed at 41 international festivals, markets and events.[31]

Total box office revenue fell by 6.1% to $835 million in 2024, and then increased slightly (0.2%) to $837 million in 2025. Canadian films' share of total box office revenue in Canada fell 51.0% to between 2023 and 2025, dropping from $29 million to $14 million.

[28] Source: Telefilm Canada (2025) 2024 – 2025 Annual Report. P. 12.
[29] All areas outside of 150 km from downtown Montreal or Toronto.
[30] Source: Telefilm Canada (2025). P 139.
[31] Source: Telefilm Canada (2025). P 12.

Exhibit 11-3 Box office revenue in Canada, by origin of production



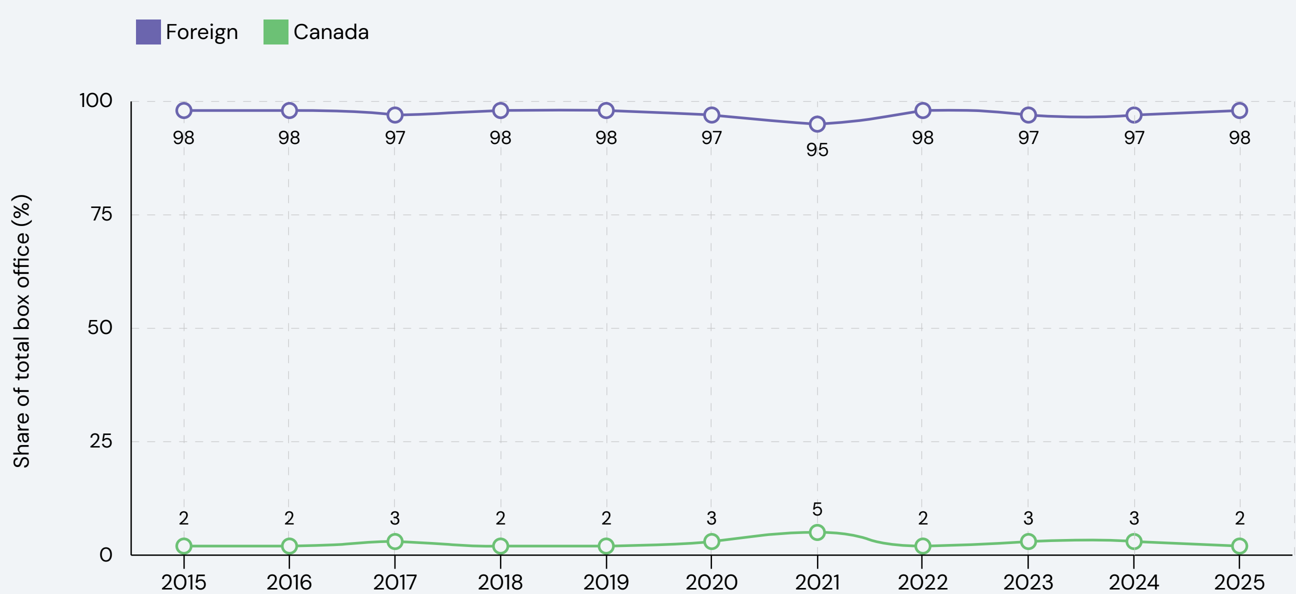
Source:
MTAC.

11.3 National box office trends

Theatrical exhibition and audiences

Canadian films' share of the Canadian box office decreased from 3.3% in 2023 to 2.8% in 2024, and then to 1.7% in 2025.

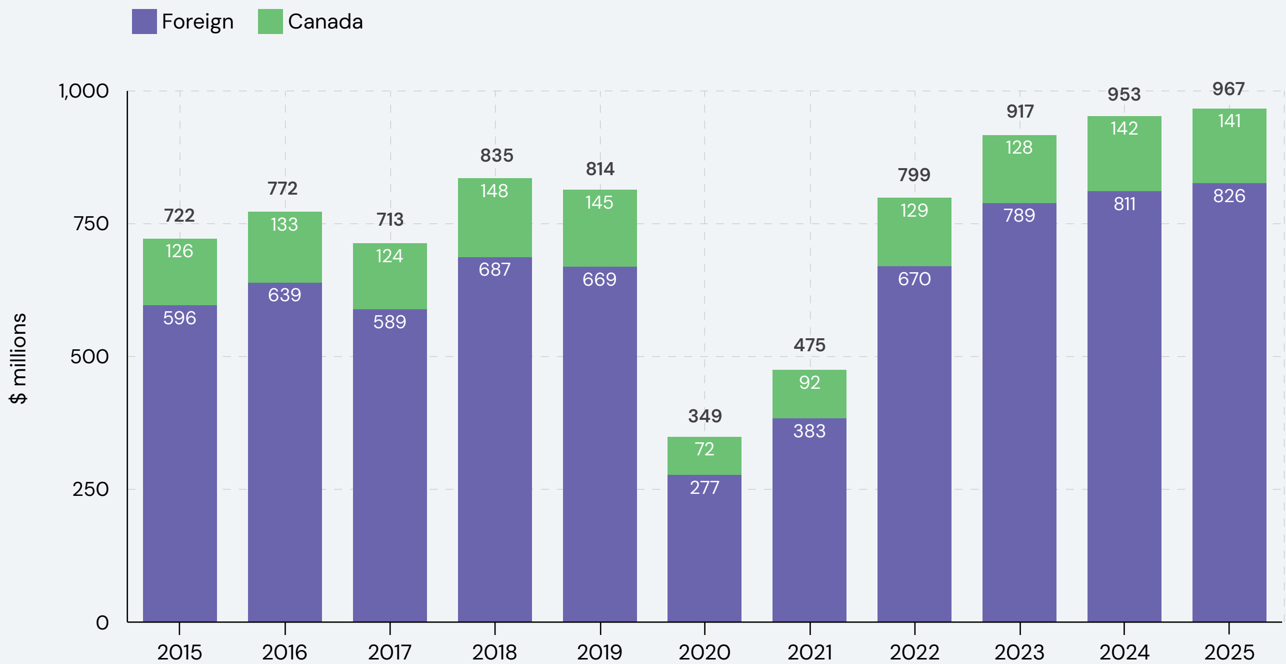
Exhibit 11-4 Shares of total box office revenue in Canada, by origin of production



Source:
MTAC.
Note:
Some totals may not sum due to rounding.

In 2024, the total number of new release feature films playing in theatres in Canada reached a 10-year high of 949, and continued to increase in 2025, reaching 962. Canadian new-release films' share of total new release in Canadian theatres increased from 14.0% to 14.9% in 2024, before falling slightly to 14.6% in 2025.

Exhibit 11-5 Number of new-release feature films playing in theatres in Canada, by origin of production



Source:
Department of Canadian Heritage analysis of data from MTAC.
Note:
Data only include feature films released for the first time in theatres in a particular year. For example, the statistics for 2024 only include the number of films released in Canadian theatres for the first time in 2024.

11.4 Box office by language market

Theatrical exhibition and audiences

Canadian films' box office revenue for films presented in English fell to $2.9 million in 2024, and by a further $0.2 million in 2025 to $2.7 million. Canadian films' box office revenue for films presented in French increased to $20.7 million in 2024, but then however this fell to $11.3 million in 2025.

Exhibit 11-6 Box office revenue and market share at theatres in Canada, by language market

ENGLISH-LANGAUGE MARKET ($ MILLIONS)	'16	'17	'18	'19	'20	'21	'22	'23	'24	'25
Box office of Canadian films presented in English	7.4	8.6	4.6	3.1	1.7	6.9	2.1	10.6	2.9	2.9
Box office of foreign films presented in English	866	857	893	889	197	287	588	772	731	747
Total box office of films presented in English	874	866	898	892	199	294	590	782	734	750
Canadian films' share (%)	0.9	1	0.5	0.4	0.9	2.4	0.4	1.4	0.4	0.4
(NUMBER OF FILMS) ENGLISH	'16	'17	'18	'19	'20	'21	'22	'23	'24	'25
Canadian films playing in Canadian theatre	113	113	120	132	87	85	136	156	159	149
Foreign films playing in Canadian theatre	973	949	1,058	1,084	774	702	1,039	1,261	1,365	1,491
Total films playing in Canadian theatre	1,086	1,062	1,178	1,216	861	787	1,175	1,417	1,524	1,640
Ratio of foreign to Canadian films	8.6	8.4	8.8	8.2	8.9	8.3	7.6	8.1	8.6	10
FRENCH-LANGAUGE MARKET ($ MILLIONS)	'16	'17	'18	'19	'20	'21	'22	'23	'24	'25
Box office of Canadian films presented in French	10.3	23.6	15.8	14	6	10.8	9.7	18.7	20.7	11.3
Box office of foreign films presented in French	109	104	102	105	28	38	70	88	80	76
Total box office of films presented in French	119	128	117	119	34	49	79	107	101	87
Canadian films' share (%)	8.7	18.5	13.5	11.7	17.5	22.1	12.2	17.5	20.1	13
(NUMBER OF FILMS) FRENCH	'16	'17	'18	'19	'20	'21	'22	'23	'24	'25
Canadian films playing in Canadian theatre	104	95	112	111	68	79	95	117	119	151
Foreign films playing in Canadian theatre	291	289	318	345	236	212	262	283	295	380
Total films playing in Canadian theatre	395	384	430	456	304	291	357	400	414	531
Ratio of foreign to Canadian films	2.8	3	2.8	3.1	3.5	2.7	2.8	2.4	2.5	2.5

Source:
MTAC.
Note:
Some totals may not sum due to rounding.

11.5 Top feature films by language of presentation

Theatrical exhibition and audiences

Exhibit 11-7 Top 10 Canadian-produced feature films presented in the English-language market, 2024 and 2025

2024	BOX OFFICE RECEIPTS* ($ MILLIONS)	ORIGINAL LANGUAGE OF PRODUCTION
1. *The Apprentice*	0.49	English
2. *Trailer Park Boys: Standing on the Shoulders of Kitties*	0.27	English
3. *The King Tide*	0.18	English
4. *Irena's Vow*	0.18	English
5. *French Girl*	0.14	English
6. *500 Days in the Wild*	0.13	English
7. *Hate to Love: Nickelback*	0.13	English
8. *In a Violent Nature*	0.11	English
9. *Rumours*	0.1	English-French-Sweden-German
10. *Deaner '89*	0.07	English
2025	**BOX OFFICE RECEIPTS* ($ MILLIONS)**	**ORIGINAL LANGUAGE OF PRODUCTION**
1. *Night of the Zoopocalypse*	0.79	English
2. *Une langue universelle*	0.32	Persian-French
3. *The Road Between Us: The Ultimate Rescue*	0.2	English
4. *Skeet*	0.12	English-Arabic
5. *Morningside*	0.09	English
6. *40 Acres*	0.08	English-Cree
7. *The Shrouds*	0.08	English-Hungarian
8. *Out Standing*	0.07	English
9. *Bonjour Tristesse*	0.06	French-English
10. *Can I Get A Witness?*	0.05	English

Source:
MTAC.
Note:
* Box office receipts earned between January 1 and December 31, 2024 for 2024 receipts, and between January 1 and December 31, 2025 for 2025 receipts. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

Exhibit 11-8 Top 10 Canadian-produced feature films presented in the French-language market, 2024 and 2025

2024	BOX OFFICE RECEIPTS* ($ MILLIONS)	ORIGINAL LANGUAGE OF PRODUCTION
1. *Nos belles-soeurs*	3.51	French
2. *1995*	2.88	French
3. *Le cyclone de Noël*	2.67	French
4. *La Petite et le Vieux*	1.49	French
5. *Le successeur*	1	French
6. *Bergers*	0.97	French
7. *Mlle Bottine*	0.95	French
8. *Dis-moi pourquoi les choses sont si belles*	0.82	French
9. *Irena's Vow*	0.68	English
10. *Ababouiné*	0.54	French
2025	**BOX OFFICE RECEIPTS* ($ MILLIONS)**	**ORIGINAL LANGUAGE OF PRODUCTION**
1. *Menteuse*	2.63	French
2. *Ma belle-mère est une sorcière*	1.14	French
3. *Fanny*	0.88	French
4. *Les Furies*	0.83	French
5. *Deux femmes en or*	0.79	French
6. *Mlle Bottine*	0.55	French
7. *Ma mère, Dieu et Sylvie Vartan*	0.52	French
8. *Mille secrets mille dangers*	0.44	French
9. *Amour apocalypse*	0.32	French
10. *Night of the Zoopocalypse*	0.32	English

Source:
MTAC.
Note:
* Box office receipts earned between January 1 and December 31, 2024 for 2024 receipts, and between January 1 and December 31, 2025 for 2025 receipts. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

Exhibit 11-9 Top 10 feature films presented in the English-language market, 2024 and 2025

TOP 10 CANADIAN-PRODUCED FEATURE FILMS PRESENTED IN THE FRENCH-LANGUAGE MARKET, 2024	BOX OFFICE RECEIPTS* ($ MILLIONS)	COUNTRY OF ORIGIN
1. *Deadpool & Wolverine*	64.35	USA-UK-Australia-New Zealand
2. *Inside Out 2*	49.98	USA-Japan
3. *Dune: Part Two*	33.07	USA
4. *Despicable Me 4*	31.30	USA
5. *Wicked*	27.24	USA-Iceland
6. *Moana 2*	24.36	USA
7. *Kung Fu Panda 4*	21.17	USA-China
8. *Beetlejuice Beetlejuice*	18.63	USA
9. *Twisters*	18.47	USA
10. *The Wild Robot*	16.77	USA
TOP 10 CANADIAN-PRODUCED FEATURE FILMS PRESENTED IN THE FRENCH-LANGUAGE MARKET, 2025	BOX OFFICE RECEIPTS* ($ MILLIONS)	COUNTRY OF ORIGIN
1. *A Minecraft Movie*	40.379	Sweden-USA-New Zealand
2. *Superman*	29.319	USA-Australia-New Zealand
3. *Jurassic World: Rebirth*	27.546	USA-UK-Malta-India-Taiwan
4. *Lilo & Stitch*	24.35	USA-Australia
5. *F1 the Movie*	24.306	USA
6. *How to Train Your Dragon*	22.783	UK-USA-Iceland
7. *Wicked: For Good*	22.456	USA-Australia
8. *Mission: Impossible - The Final Reckoning*	22.138	UK-USA
9. *Zootopia 2*	21.58	USA
10. *The Fantastic Four: First Steps*	21.313	UK-USA-New Zealand

Source:
MTAC.
Note:
* Box office receipts earned between January 1 and December 31, 2024 for 2024 receipts, and between January 1 and December 31, 2025 for 2025 receipts. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

Exhibit 11-10 Top 10 feature films presented in the French-language market, 2024 and 2025

2024	BOX OFFICE RECEIPTS* ($ MILLIONS)	COUNTRY OF ORIGIN
1. *Inside Out 2*	7.4	USA-Japan
2. *Despicable Me 4*	5.27	USA
3. *Deadpool & Wolverine*	4.75	USA-UK-Australia-New Zealand
4. *Dune: Part Two*	3.96	USA
5. *Moana 2*	3.59	USA
6. *Nos belles-soeurs*	3.51	Canada
7. *1995*	2.88	Canada
8. *Kung Fu Panda 4*	2.83	USA-China
9. *Le cyclone de Noël*	2.67	Canada
10. *Twisters*	2.24	USA

2025	BOX OFFICE RECEIPTS* ($ MILLIONS)	COUNTRY OF ORIGIN
1. *Lilo & Stitch*	4.992	USA-Australia
2. *A Minecraft Movie*	4.544	Sweden-USA-New Zealand
3. *Jurassic World: Rebirth*	3.462	USA-UK-Malta-India-Taiwan
4. *Mufasa: The Lion King*	3.097	USA
5. *Zootopia 2*	3.027	USA
6. *Menteuse*	2.629	Canada
7. *F1 the Movie*	2.618	USA
8. *How to Train Your Dragon*	2.343	UK-USA-Iceland
9. *Mission: Impossible - The Final Reckoning*	2.22	UK-USA
10. *Sonic the Hedgehog 3*	1.997	USA

Source:
MTAC.
Note:
* Box office receipts earned between January 1 and December 31, 2024 for 2024 receipts, and between January 1 and December 31, 2025 for 2025 receipts. This amount may under-represent a particular film's total box office receipts, if the film played in Canadian cinemas in other calendar years.

12 Broadcasting distribution undertakings

The broadcasting distribution sector includes cable, direct-to-home (DTH) satellite and Internet protocol television (IPTV) services. These services allow Canadian households and businesses to access licensed television programming services, including conventional, discretionary and on-demand services, through subscriptions to channel packages and selected à la carte services. Cable, DTH satellite and IPTV services are collectively referred to as broadcasting distribution undertakings (BDUs).

The statistics in this section cover the 2024 broadcasting year, running from September 1, 2023 to August 31, 2024.

Highlights from the 2024 broadcast year

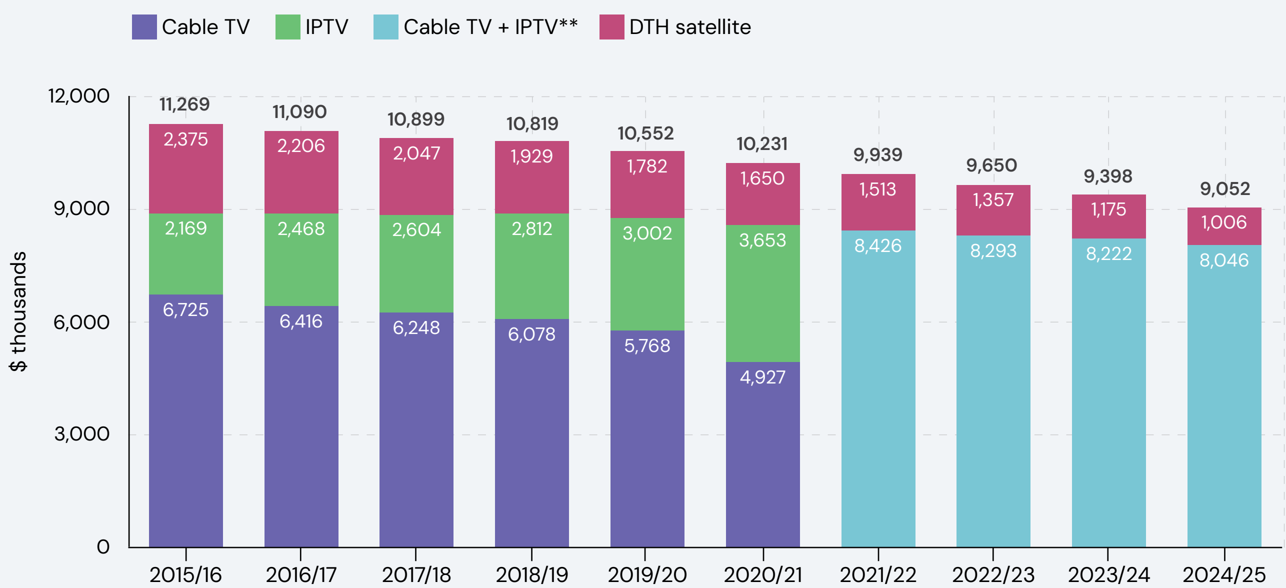
- The total number of BDU subscribers declined by 3.7% to 9.05 million.
- BDU revenues declined by 8.0% to $6.4 billion.
- BDU contributions to the creation of Canadian programming decreased by 2.8% to $364 million. This overall decline included a 7.8% decrease in contributions to Canadian production funds; offset in part by a 4.5% increase in contributions to BDU-owned community channels.

12.1 BDU subscribers and revenue

Broadcasting distribution undertakings

Canada's BDU industry continued to experience further cord-cutting during the 2024 broadcasting year (September 1, 2023 to August 31, 2024). According to statistics from the Canadian Radio-television and Telecommunications Commission (CRTC), the number of subscriptions to Canadian BDU services peaked at 11.53 million in 2012. In 2024, the BDU industry shed 346,000 subscribers (down 3.7%) from 2023, dropping to 9.05 million.

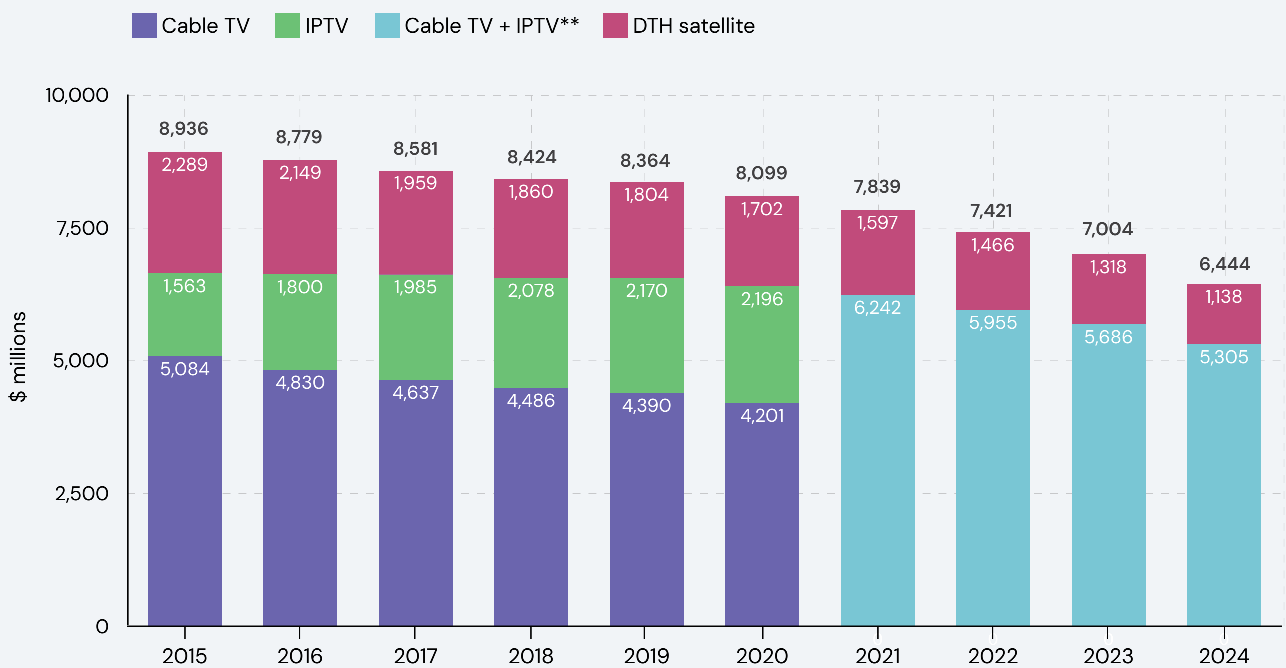
Exhibit 12-1 Number of BDU Subscribers, by type



Source:
CRTC.
Note:
Some totals may not sum due to rounding.
* Excludes BDUs not required by regulations to report financial and operating data to the CRTC.
** Beginning in 2021, the CRTC reports cable TV and IPTV subscribers on a combined basis.

BDU revenues declined by 8.0% to $6.44 billion during the 2024 broadcasting year.

Exhibit 12-2 Total revenue in the Canadian broadcasting distribution industry*



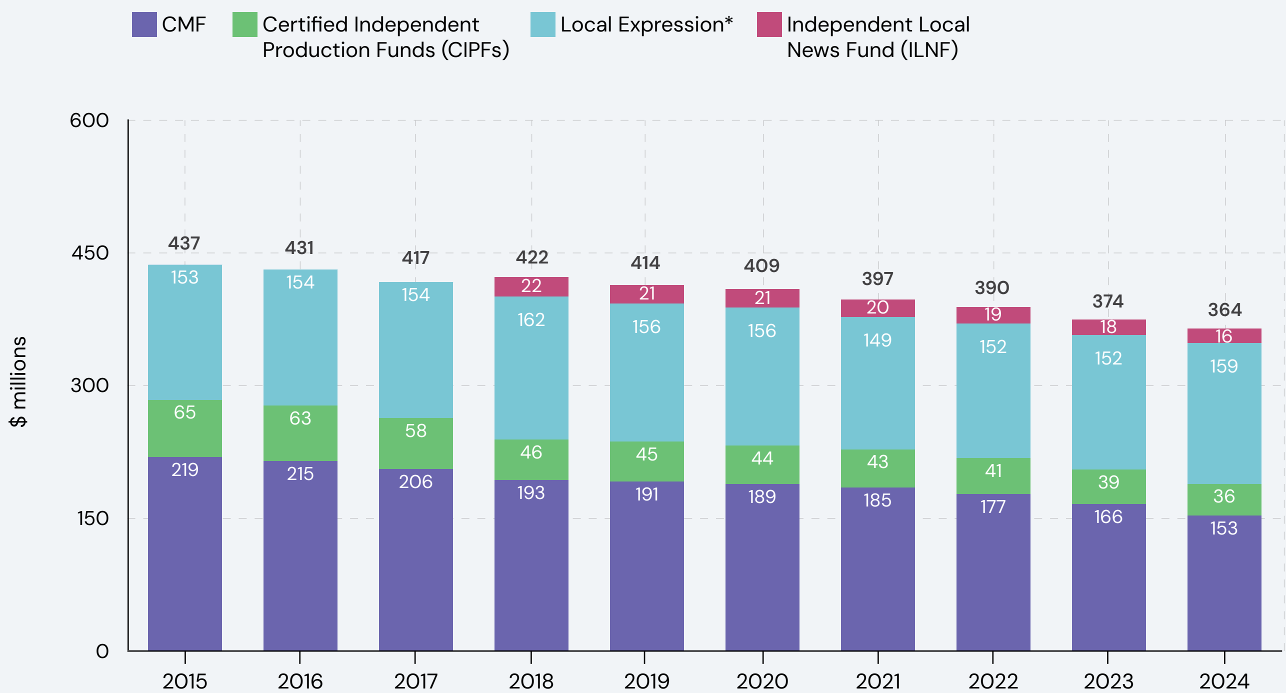
Source:
CRTC.
Note:
Some totals may not sum due to rounding.
* Excludes BDUs not required by regulations to report financial and operating data to the CRTC.
** Beginning in 2021, the CRTC only reports the total revenue for cable TV and IPTV subscribers on a combined basis.

12.2 BDU Contributions to Canadian programming

Broadcasting distribution undertakings

Through their contributions to the Canada Media Fund (CMF), Certified Independent Production Funds (CIPFs) and the funding of local programming, BDUs support the creation of Canadian content. In 2024, BDU contributions to the creation of Canadian programming decreased by 2.8% to $364 million. This overall decline included a 7.8% decrease in contributions to the CMF; 7.7% decrease in contributions to CIPFs; offset in part by a 4.5% increase in contributions to BDU-owned community channels.

Exhibit 12-3 BDU Contributions to Canadian programming



Source:
CRTC.
Note:
Some totals may not sum due to rounding.
*Local Expression combines Licensee's own community channel, Community programming in other markets operated by the licensee and Locally reflective news programming.

Notes on methodology

Estimates of Canadian production

The estimates of Canadian production are based on data from the Canadian Audio-Visual Certification Office (CAVCO) of the Department of Canadian Heritage. In order to account for the fact that there is a 42-month window in which producers may submit their application to CAVCO, Nordicity applied the following gross-up factors to the raw production data supplied by CAVCO.[32]

- Gross-up factors applied to the raw production data supplied by CAVCO:
  - 2022/23: 2.9%
  - 2023/24: 5.4%
  - 2024/25: 22.4% (television) 16.4% (theatrical)

Note that the gross-up factor for 2024/25 is higher than the rate previously used (11%) in *Profile 2023* and earlier editions. This is due to the fact that this version of the *Profile* was prepared using a dataset from CAVCO from the spring rather than fall and therefore would be subject to a larger lag adjustment, since it was missing six months of data in comparison to the historical fall datasets supplied by CAVCO.

The above rates were based on historical rates of under-coverage observed in the CAVCO statistics between 2012/13 and 2018/19 (i.e. before the COVID-19 pandemic), with particular weight given to the rates of under-coverage observed in the latter years of this 7-year period.[33] The rates for 2024/25 include further adjustment to reflect the historical changes in volume observed between the spring and fall datasets prepared by CAVCO.

Revisions to historical statistics

Due to the 42-month application lag at CAVCO, it is possible that the data from CAVCO may not provide a comprehensive indication of production volume until up to four years after the end of a particular fiscal year. As a result, the Canadian production statistics reported in *Profile 2025* for the previous three years (2021/22, 2022/23 and 2023/24) have been revised to reflect all currently available data from CAVCO.

Estimates of Canadian television production certified by the Canadian Radio-television and Telecommunications Commission

The estimates of Canadian television production include an estimate of television production certified by the Canadian Radio-television and telecommunications Commission (CRTC) (i.e. television production exclusively certified by the CRTC). Research conducted by Nordicity and the Department of Canadian Heritage in 2009 indicated that CRTC-certified television production accounted for an estimated 13.5% of total Canadian production. This rate was used in *Profile 2025* to estimate the total volume of CRTC-certified production.

Short films

Short films include films under 75 minutes in length. In *Profile 2012* and earlier editions, data for theatrical short films was included in the overall statistics for Canadian theatrical production. Beginning in *Profile 2013*, data for theatrical short films was included in the statistics for Canadian television production. In *Profile 2024*, data for theatrical short films has been included in Canadian television production for all years – 2013/14 through 2024/25.

Although the definition of theatrical short films would imply that they should be included in the Canadian theatrical production statistics, by removing them, we can better isolate data on theatrical feature films. Furthermore, we note that the low volume of theatrical short film production reported in earlier editions of *Profile* suggests that applicants had, in fact, reported many theatrical short films in the Canadian television production category.

Canada Media Fund

Statistics for CMF funding and supported production are reported on a fiscal-year basis, April 1 to March 31. Data is collected by the CMF during pre-production. In this report, if the source of the data is CMF alone, the data represents a pre-production year. If the source refers to CMF data with other sources, such as CAVCO, a project's fiscal year is adjusted accordingly. The statistics reported for the CMF include data for linear content creation supported by the CMF in 2024/25 and Convergent Stream production supported by the CMF in prior fiscal years.

[32] Under the Canadian Film or Video Production Tax Credit (CPTC) program, producers can submit their CPTC application to CAVCO up to 42 months after the end of the fiscal year in which principal photography started.
[33] The higher weighting given to more recent years (i.e. in the years leading up to 2018/19) is intended to reflect the fact that producer-application practices in those more recent years would likely be more reflective of the application lag situation than in earlier years within that seven-year period.

Broadcaster in-house production

A complete set of provincial statistics was not available for private broadcaster in-house production in the Prairie Provinces and Atlantic Canada. For the Prairie Provinces, Nordicity developed estimates based on the historical shares observed in the CRTC statistics prior to 2001 – before the CRTC began to suppress the provincial statistics. The breakdown of private broadcaster in-house production among the provinces in Atlantic Canada was also based on the development of estimates. Because no historical data existed, each province's share of Atlantic Canada's total gross domestic product (GDP) was used as the proxy variable for the estimate.

Reconciliation with statistics published by federal and provincial funding agencies

Certain federal and provincial funding agencies, including Telefilm Canada, also publish statistics for film and television production activity. The statistics published by these funding agencies may differ from those in *Profile 2025* for a variety of reasons.

- Reasons the statistics published by these funding agencies may differ from those in *Profile 2025*:
  - Provincial funding agencies typically report production activity based on the amount of production spending left in the province (i.e., paid to persons and businesses resident in the province). The statistics in *Profile* are derived from CAVCO data and report 100% of a project's spending in the province in which the lead producer is located. For the purpose of Exhibit 2-6b, CAVCO's spend-based statistics report 100% of a project's spending in the province that accounted for the majority of that's project's filming days.
  - Certain provincial funding agencies publish production statistics on a calendar-year basis rather than on a fiscal-year basis, as they are reported in *Profile*.
  - Statistics reported by Telefilm Canada only include feature films that either received financial support from the agency or were recommended under one of Canada's audiovisual coproduction treaties.
  - Some funding agencies report production activity on the basis of the fiscal year in which a film or television project receives approval for its tax credit application or other type of funding award, rather than the year in which the project's principal photography starts (i.e. the practice used by CAVCO). For example, Telefilm Canada reports feature film production activity based on the fiscal year in which a project receives its funding commitment from the agency.
  - Statistics reported by funding agencies exclude broadcaster in-house production.

Foreign investment in production

Foreign investment in production (FIIP) tracks the value of international financial participation in the film and television production industry in Canada. FIIP includes foreign presales and distribution advances for all projects certified by CAVCO; estimates of presales and distribution advances for non-CAVCO-certified productions; and the total value of foreign location and service (FLS) production in Canada. FIIP as opposed to just exports better reflects the nature of film and television production in Canada. It acknowledges that film and television productions are intangible products and portions of the copyright can be exported to foreign countries. It also accounts for the budgets of productions shot in Canada, even when the copyright is held by a foreign entity.

The data used to estimate FIIP only includes the financing of the Canadian budget of treaty coproductions. As a result, the foreign budgets for treaty coproductions do not directly contribute to FIIP. Treaty coproductions contribute only to FIIP if the financing of the Canadian budget includes a foreign presale or distribution advance.

Estimation of person-count employment

To estimate the number of people employed in film and television production (i.e. direct employment) as well as the spin-off employment generated by film and TV production, Nordicity developed multipliers for converting the number of full-time equivalents (FTEs) into headcount. (See below for description of the methodology for estimating FTEs).

For direct employment, these multipliers were developed based on research of aggregate wages, days worked, and the number of people currently registered with unions and guilds to work in film and TV production in Canada. In total, data was collected from seven local unions, and three broader labour organisations (i.e. ICG, ACTRA, DGC) representing workers in multiple parts of Canada.

These calculations were based on labour force participation measured in 2017, 2018, 2019 and 2020, and may change over time depending on labour market conditions and changes in the overall composition of the film and TV production workforce by department.

For spin-off employment, Nordicity developed a separate multiplier based on the economy-wide ratio of employees to full-time equivalents. This economy-wide ratio was based on data published in Statistics Canada Tables 14-10-0043-01 and 14-10-0327-03.

Estimation of full-time equivalent (FTE) employment

Nordicity calculated the number of direct jobs by estimating the share of total production volume that was paid as salaries and wages to cast and crew, and then dividing this estimate by an estimate of the average salary of an FTE in the film and television production sector.

Nordicity multiplied total production volume by 57%, to estimate the portion of production budgets that was paid as salary and wages to cast and crew members. This assumption of 57% is based on data provided by CAVCO on the average portion of production budgets comprised of Canadian labour expenditures.

The average FTE salary assumption for 2024/25 was $86,052. Nordicity developed the average FTE salary assumption based on data from Statistics Canada's 2016 Census. From 2016 onwards, Nordicity has made annual adjustments to the average FTE assumption by applying the average rate of change in the economy-wide average hourly wage (excluding overtime) of employees paid by the hour in Canada (see Statistics Canada, Survey of Employment, Payroll and Hours, Table 14-10-0206-01).[34]

Average FTE salary in the film and television production sector

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Average FTE cost	$58,607	$59,445	$60,396	$62,389	$64,074	$67,213	$77,094	$79,638	$82,425	$86,052

Source:
Nordicity calculations based on data from Statistics Canada, Census 2016, and Statistics Canada, Survey of Employment, Payroll and Hours, Table 14-10-0206-01.

Spin-off employment impact

The number of spin-off FTEs is equal to the sum of indirect and induced FTEs.

Based on previous reviews of Statistics Canada's 2004 multiplier tables and data for the Motion Picture and Video Production, Distribution, Post-Production and Other Motion Picture and Video Industries (which was the closest industry grouping to film and TV production); Conference Board of Canada, Canada Valuing Culture: Measuring and Understanding Canada's Creative Economy (2008); and adjustments to take into account wage inflation.

Economic impact of production

Labour income

Direct labour income in the film and television production sector was derived by multiplying the number of direct FTEs by the average production-sector FTE cost of in the film and television production industry (see above). The estimate of spin-off labour income was derived by multiplying the number of spin-off FTEs by an economy-wide average FTE cost of $65,520.

Gross domestic product

Given the prominence of wages and salaries within the direct impact of film and TV production, direct GDP was calculated by multiplying direct labour income by 1.02. Spin-off GDP was derived by applying the GDP-wage ratio of 1.49 implied by the analysis in Conference Board of Canada, Valuing Culture: Measuring and Understanding Canada's Creative Economy (2008).

[34] To better reflect the labour market and production-cost conditions within the film and television production industry, for 2020/21, Nordicity applied the implied average annual rate of change in the average hourly wage (excluding overtime) within the Information and Cultural Industries (14.7%).

Glossary

Advertising video-on-demand (AVOD): An Internet-based service that gives consumers free access to video content in exchange for being exposed to advertising (e.g. YouTube).

Average minute audience (AMA): The average number of persons watching a television program during any 60-second portion of that program.

Broadcaster in-house production: Refers to television programs made internally by broadcasters. It largely consists of news and sports programming, but can also include production in other genres.

Broadcasting distribution undertakings (BDUs): Includes cable, direct-to-home (DTH) satellite, and Internet protocol TV (IPTV) services that allow Canadian households and businesses to access licensed television programming services, including conventional television, discretionary television services and on-demand television services, by subscribing to channel packages and certain à la carte services.

Canada Media Fund (CMF): The Canada Media Fund (CMF) supports the creation of popular, innovative Canadian content and software applications. The CMF receives contributions from the Government of Canada and Canada's cable, satellite and Internet Protocol television (IPTV) distributors. The CMF is a not-for-profit corporation that supports the Canadian television and digital media industries through several programs.

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

Canadian Film or Video Production Tax Credit (CPTC): The federal government tax credit program for supporting the production of films and television programs that qualify as Canadian content. The CPTC is equal to 25% of a production's "qualified labour expenditure" (QLE) in a given year. The QLE refers to the eligible labour expenses for the production, capped at 60% of the production's total costs, net of any assistance received.

Canadian programming expenditure (CPE): The monetary value of licensed Canadian broadcasters' spending on original or acquired television programs that qualify as Canadian content.

Canadian Radio-television and Telecommunication Commission (CRTC): Canada's regulator of the broadcasting and telecommunications sectors.

Conventional television / Conventional TV: Includes private and public broadcasters that maintain over-the-air (OTA) infrastructure to broadcast to households, although the vast majority of Canadian households now receive conventional television signals via cable television, DTH satellite television or IPTV providers.

Convergent Stream: A former funding stream of the CMF that used to provides financial support to the production of digital media components that are related to CMF-funded television productions in order to provide content on different digital media platforms. The CMF has initiated changes whereby the Convergent and Experimental Streams have been replaced with Ideation, Creation and Industry.

Coproduction: A film or television program made by producers from two or more countries and typically shot in those producers' countries. Coproductions are made in accordance with coproduction treaties between countries to ensure that they receive national treatment in each producer's country ("audiovisual treaty coproductions"). Note the coproduction section only includes statistics for audiovisual treaty coproductions.

Direct-to-home (DTH) satellite television: A BDU service under which households and businesses utilize a small aperture satellite antenna to receive television signals.

Discretionary services: Refers to television services that are only available via cable, DTH satellite and IPTV service providers, and typically provide sports, 24-hour news, movies, arts and other thematic programming. Discretionary services earn revenue from a combination of subscription fees and advertising. They may also be referred to as specialty television or pay television services.

Educational broadcasters: Refers to the four television broadcasting licensees controlled by provincial governments, which focus on the provision of educational programming. The four educational broadcasters include TéléQuébec, TVO, Knowledge Network (BC) and Groupe Média. TFO.

Experimental Stream: A former funding stream of the CMF that used to provides financial support to the production of interactive digital media content, software applications and web series that are unrelated to CMF-funded television productions. The CMF has initiated changes whereby the Convergent and Experimental Streams have been replaced with Ideation, Creation and Industry.

Film or Video Production Services Tax Credit (PSTC): The federal government tax credit program for supporting the production of films and television programs that do not qualify as Canadian content. The PSTC provides a tax credit equal to 16% of a production's "qualified Canadian labour expenditures" (QCLE). The QCLE is equal to the eligible Canadian labour expenses for the production, net of any assistance received in respect of those expenses.

Foreign investment in production (FIIP): A measurement of the value of international financial participation in the film and television production sector in Canada. It includes foreign presales and distribution advances for all projects certified by CAVCO; estimates of presales and distribution advances for non-CAVCO-certified productions; and the total value of foreign location and service (FLS) production in Canada.

Foreign location and service (FLS): Includes feature films and television programs filmed in Canada primarily by foreign producers. It also includes the visual effects (VFX) work done by Canadian VFX studios for foreign films and television programs.

Free Ad-Supported Streaming Television (FAST): A type of internet-delivered television service that offers free, advertiser-supported, linear streaming channels programmed on a scheduled basis, allowing viewers to watch continuously curated content without a subscription.

Full-time equivalents (FTEs): A measurement of employment that converts the number of part-time workers or any workers working less than a full work year into the equivalent number of full-time workers.

Gross domestic product (GDP): The sum of the economic value-added generated within an industry or economy. The difference between the value of an industry's output and the value of the inputs it consumes from other industries.

Indigenous production: Production information was compiled, using the definition for Indigenous production established by the Indigenous Screen Office (ISO). An Indigenous production is defined as a production that is Indigenous controlled (minimum 51% ownership by person(s) who are First Nations, Inuit or Métis); and a project that is under the financial and creative control of Indigenous persons; two of the three key members of the creative team are Indigenous. Of note, some funding agencies have developed definitions that may vary slightly from the ISO definition.

Internet-based television services or Internet-based video services: Includes SVOD, AVOD and TVOD services.

Internet protocol TV (IPTV): A BDU service that is supplied to households and businesses through a broadband connection.

Linear content creation: The production of professionally produced audiovisual programming traditionally associated with television, including scripted and unscripted series and feature-length programming, regardless of whether the content is first exhibited via linear television channels or on-demand services.

On-demand services: On-demand services permit consumers to watch specific films or television programs whenever they want, rather than at a scheduled time (i.e. linear television). On-demand services can be offered over BDU platforms (SVOD, AVOD, TVOD and FAST).

Programs of national interest (PNI): Television programming that falls within the categories of drama and comedy; long-form documentary; English-language awards shows; and French-language music, dance and variety programming.

Spin-off impact: Refers to the sum of the indirect and induced economic impacts. The indirect impact includes the employment and GDP generated within industries that supply goods and services to the production sector. The induced impact includes the employment and GDP generated in consumer industries within the Canadian economy that benefit from the re-spending of wages earned by production sector cast and crew, and the workers employed in the supplier industries

Subscription video-on-demand (SVOD): A television service whereby consumers pay a subscription fee so that they can choose specific films or television programs to watch and when to watch them (e.g. Netflix, Disney+, Crave, Club illico, Amazon Prime Video, DAZN). Consumers typically access SVOD services over set-top boxes, smart TVs, computers or mobile devices.

Telefilm Canada: A Crown corporation established by the Government of Canada in 1968 with a mandate to invest in the production of Canadian films. Telefilm Canada now administers most of the federal government's programs for supporting the Canadian film industry. It also administers Canada's treaty coproduction agreements on behalf of the federal government, as well as the funding programs of the CMF.

Transactional video-on-demand (TVOD): An online service whereby consumers can pay a fee to download a specific film or television program (e.g. Apple iTunes). In some cases, TVOD can be used to rent a film or television program, where use of the download is restricted to a *period of time*.

Video-on-demand (VOD): A television service whereby consumers can pay a fee to choose specific films or television programs to watch, and when to watch them. In Canada, VOD is typically offered over BDU platforms (i.e. cable-TV, IPTV or DTH satellite).