



# **Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces**

**Prepared for**

**On Screen Manitoba**

**Alberta Media Production Industries Association**

**and**

**Saskatchewan Motion Picture Industry Association**

**Prepared by:**

**Nordicity**

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## Table of Contents

<b>Executive Summary</b>	<b>i</b>
About the study	i
CBC/Radio-Canada	i
Canada Media Fund	ii
Canada Feature Film Fund	ii
National Film Board of Canada	iii
Aboriginal People’s Television Network	iii
<b>1. Introduction</b>	<b>1</b>
1.1 Background	1
1.2 Purpose of study	2
1.3 Report outline	3
<b>2. Methodology and Data Sources</b>	<b>4</b>
<b>3. CBC/Radio-Canada</b>	<b>6</b>
3.1 CRTC data	6
3.2 Data from provincial funding agencies	7
3.2.1 Manitoba	8
3.2.2 Saskatchewan	9
3.2.3 Alberta	9
3.3 CAVCO data	11
3.3.1 Manitoba	11
3.3.2 Saskatchewan	12
3.3.3 Alberta	13
3.3.4 Manitoba Francophone	15
3.4 Summary	16
<b>4. Canada Media Fund</b>	<b>18</b>
4.1 Manitoba	19
4.2 Saskatchewan	20
4.3 Alberta	21
4.4 Manitoba Francophone	22
4.5 Aboriginal production	24
4.6 Summary	25
<b>5. Canada Feature Film Fund</b>	<b>26</b>
<b>6. National Film Board of Canada</b>	<b>29</b>
6.1 All languages	29



6.1.1 In-house production	29
6.1.2 Coproduction	30
6.2 Francophone production	31
6.3 Aboriginal production	32
6.4 Summary	32
<b>7. Aboriginal Peoples Television Network</b>	<b>33</b>
7.1 Manitoba	33
7.2 Saskatchewan	34
7.3 Alberta	35
7.4 Summary	36
<b>8. Summary of Findings</b>	<b>37</b>
<b>References and Data Sources</b>	<b>39</b>
<b>Appendix: Data Tables</b>	<b>40</b>

## Executive Summary

### About the study

- The important role played by the Prairie Provinces – Manitoba, Saskatchewan and Alberta – in forging Canada’s identity underlines the need for its storytellers and stories to have pride of place within the Canadian broadcasting system. Without such a place, Canadians across the country risk not learning and understanding the Canadian experience. In recent years, however, film and television producers in the Prairie Provinces have noted that production levels in the region are decreasing.
- The broadcasting licence renewal process for CBC/Radio-Canada presents an important opportunity to compile evidence and investigate the commissioning and funding activity of all of Canada’s public organizations (i.e., CBC/Radio-Canada, Canada Media Fund [CMF], Telefilm Canada and the National Film Board [NFB]) that support regional production in the Prairie Provinces. CBC/Radio-Canada’s licence renewal process also presents an opportunity to compile evidence on the levels of Francophone and Aboriginal production in the Prairie Provinces.
- To that end, On Screen Manitoba, the Alberta Media Production Industries Association (AMPIA) and the Saskatchewan Motion Picture Industry Association (SMPIA) commissioned Nordicity to prepare a study analyzing the levels of television and film commissioning made by Crown corporations, other funding organizations (i.e., CMF), and the Aboriginal Peoples Television Network (APTN).
- This study utilizes data from the Canadian Radio-television and Telecommunications Commission (CRTC), Canadian Audiovisual Certification Office (CAVCO) and provincial funding agencies to assess CBC/Radio-Canada’s expenditures in the Prairie Provinces. It also assesses the regional funding patterns displayed by the CMF and CFFF, and commissioning levels attributed to APTN and NFB.

### CBC/Radio-Canada

- Data from provincial funding agencies show that **Manitoba** was under-represented in terms of CBC/Radio-Canada expenditures. Longer-term data from CAVCO for all public broadcasters<sup>1</sup>

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<sup>1</sup> CAVCO data do not permit CBC/Radio-Canada’s expenditures to be isolated from the expenditures of other public broadcasters, i.e., provincial educational broadcasters.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

also shows that Manitoba was under-represented in terms of broadcaster expenditures between 2005-06 and 2009-10.

- **Alberta** also appears to have been under-represented in terms of public broadcaster expenditures; although data from Alberta Film indicate that it was the recipient of a disproportionately higher share of CBC/Radio-Canada expenditures in 2008-09.
- To date, data for **Saskatchewan** are only available from CAVCO for all public broadcasters' expenditures in independent production. Saskatchewan's share of public-broadcaster expenditures was typically in proportion to or under-represented, between 2005-06 and 2009-10, according to CAVCO data; although its share of production activity (i.e., the number of projects and total value of budgets) fluctuated between periods of over- and under-representation. Saskatchewan's stronger performance vis-à-vis the other provinces may be due to the role of SCN, which would be captured by CAVCO data.
- Manitoba's small yet culturally significant share of Canada's overall Francophone population (0.7%) meant that it was over-represented in terms of its share of public broadcasters' expenditures on Francophone production. However, this type of over-representation would have been expected for a significant minority-language community seeking to retain its unique cultural identity within a predominantly English-language environment.

### Canada Media Fund

- The CMF's mandate calls for it to support regional production – although the definition of “regional” is vague. The CMF has introduced funding envelopes specifically designed to support its regional mandate as well as Francophone production outside of Quebec and Aboriginal production. That being said, the **Prairie Provinces** were under-represented in terms of their share of CMF funding and production, between 2007-08 and 2010-11. While Manitoba was over-represented in terms of its share of CMF-supported Francophone production, the Prairie Provinces, as a whole region, were significantly under-represented in terms of their share of CMF-supported Aboriginal production between 2007-08 and 2010-11.

### Canada Feature Film Fund

- The **Prairie Provinces** were also significantly under-represented in terms of their share of Canada Feature Film Fund (CFFF) funding and production activity between 2003-04 and 2010-11. In 2005-06 and 2008-09 there was no CFFF-supported production in any of the Prairie Provinces. For the other six years, Nordicity analysis indicates that the Prairie Provinces'

## **Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces**

typically received one-half or less of their share of CFFF funding in relation to the national population.

### **National Film Board of Canada**

- The **Prairie Provinces** were largely under-represented in terms of their share of NFB funding and production activity for both in-house and coproductions between 2006-07 and 2010-11. In fact, the Prairie Provinces consistently received less than their share of NFB funding for in-house and coproductions in every year between 2006-07 and 2010-11. The diversity of NFB funded projects in the Prairie Provinces was also very limited. The NFB supported zero Francophone and zero Aboriginal productions in the Prairie Provinces between 2006-07 and 2010-11.

### **Aboriginal People's Television Network**

- As a whole, the **Prairie Provinces** are relatively well represented by APTN funding and production activity. After adjusting for the Prairie Provinces' share of Canada's Aboriginal population, Manitoba and Alberta maintain a strong share of APTN commissioning, supporting a smaller number of larger productions in general. Saskatchewan, however, has seen its share of APTN commissioning decline steadily between 2006-07 and 2010-11.



# 1. Introduction

## 1.1 Background

- Regional representation is one of the key principles of Canadian broadcasting policy. Indeed, the *Broadcasting Act 1991* explicitly encourages Canadian broadcasters to reflect all regions of Canada in the programming that they commission and exhibit.

3. (1) It is hereby declared as the broadcasting policy for Canada that

- (i) the programming provided by the Canadian broadcasting system should
- (ii) be drawn from local, regional, national and international sources

(*Broadcasting Act 1991*)

- Over the decades the Canadian Radio-television and Telecommunications Commission (the “Commission” or CRTC) has sought to realize this policy objective by encouraging or requiring licensees to achieve targets for their financial contributions to independent production in certain regions of Canada. While this policy has never directly been given effect through regional quotas, the Commission has indirectly implemented it through conditions of licence or expectations placed upon licensees. In some cases, the Commission has also used the tangible benefits packages associated with transfers of broadcasting licences – particularly licences for local or regional broadcasters – to affect the level of independent production in certain regions of Canada.
- Ontario and Quebec have historically been the two provinces with the largest levels of television production in Canada. Other provinces and territories, however, have also celebrated rich traditions in television and film production. The Prairie Provinces, Atlantic Canada, British Columbia and The Far North have all made important contributions to the development of film and television in Canada, with films and television programs that reflect their cultural traditions.
- Indeed, among the regions of Canada, the Prairie Provinces – Manitoba, Saskatchewan and Alberta – offer a unique demography, economy and history: this uniqueness plays an important role in the overall narrative of Canada’s development.
- First and foremost, the Prairie Provinces – and Manitoba in particular – are rich in linguistic diversity. Aboriginal languages and French are spoken across the Prairie Provinces as mother tongues. In Manitoba, in particular, there has been a Francophone community for over 250 years. The Prairie Provinces are also ethnically diverse. The European settlement of the 19<sup>th</sup> and 20<sup>th</sup> century has been followed in recent decades by further immigration from Asia and Africa. The Prairie Provinces’ linguistic and ethnic richness are rich sources of vital Canadian stories.

## **Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces**

- From fur trading and the Hudson's Bay Company, to Prairie agriculture, to today's natural resources mining, the Prairie Provinces have, at numerous junctures, played an important role in Canada's economic development. As the birthplace of new political parties and universal healthcare, the region's political leaders and institutions have had a lasting mark on Canada's socio-political environment at the national level. The important role played by the Prairie Provinces in forging Canada's identity underlines the need for its storytellers and stories to have pride of place within the Canadian broadcasting system. Without such a place, Canadians across the country risk failing to learn, understand and better appreciate the Canadian experience.
- In recent years, however, film and television producers in the Prairie Provinces have noted that production levels in the region are decreasing. One potential contributing factor to this decline is the mounting difficulty of securing commissions from Canadian broadcasters. Private broadcasters no longer have commissioning editors based in Manitoba, for example; and anecdotal evidence suggests that CBC/Radio-Canada may also be moderating its commissioning activity in the region.
- While decreasing levels of regional production are a concern, so too is the level of minority language (i.e., Francophone) and Aboriginal production. Indeed, minority language production in Canada faces a unique set of challenges, which warrants policy and program support. As home to one of Canada's minority Francophone communities, Manitoba has a particular interest in ensuring that these policies and programs – namely those administered by the Canada Media Fund (CMF) – are achieving their desired results. As well, the other two Prairie Provinces – Alberta and Saskatchewan – have their Francophone communities.
- The production communities in the Prairie Provinces are also a key source of Canada's Aboriginal production. To that end, the Aboriginal Peoples Television Network (APTN), based in Winnipeg, is one natural source of commissions for Aboriginal production. However, it was not intended that its role would be a substitute for commissioning of Aboriginal production by other Canadian broadcasters; it was intended to be supplemental.

### **1.2 Purpose of study**

- CBC/Radio-Canada's broadcasting licence is up for renewal in 2012. This licence renewal process presents an important opportunity to compile evidence and investigate the commissioning and funding activity of all of Canada's public organizations (e.g. CBC/Radio-Canada, CMF, Telefilm Canada and the National Film Board [NFB]) that support regional production in the Prairie Provinces. CBC/Radio-Canada's licence renewal process also presents

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

an opportunity to compile evidence on the levels of Francophone and Aboriginal production in the Prairie Provinces.

- To that end, On Screen Manitoba, the Alberta Media Production Industries Association (AMPIA) and the Saskatchewan Motion Picture Industry Association (SMPIA) commissioned Nordicity to prepare the following study analyzing the levels of television and film commissioning made by Crown corporations, other funding organizations (i.e., CMF), and the Aboriginal Peoples Television Network (APTN).
- It is not the intention of On Screen Manitoba, the Alberta Media Production Industries Association (AMPIA) and the Saskatchewan Motion Picture Industry Association (SMPIA) to call for production activity to be allocated on a per capita basis; however, comparing the level of production to the national audience share provides a useful measure for understanding production activity as a reflection of a diverse population.

### 1.3 Report outline

- Following this Introduction section, the study is divided into the following sections.
  - **Section 2** provides an overview of the general methodology and data sources.
  - **Section 3** presents the analysis of CBC/Radio-Canada. This analysis uses three different approaches – based on three different data sources – to construct a picture of CBC/Radio-Canada’s expenditures on production in the Prairie Provinces.
  - **Section 4** presents an analysis of CMF support for television production in the Prairie Provinces. For each Prairie Province we present statistics for production in all languages; for the region as a whole, we present statistics for Francophone and Aboriginal production.
  - **Section 5** provides a regional breakdown of the feature film funding from the Canada Feature Film Fund (CFFF).
  - **Section 6** examines the NFB’s support for co-production with independent producers in the Prairie Provinces.
  - **Section 7** presents statistics for APTN’s commissioning of Aboriginal production from independent producers in the Prairie Provinces.
  - **Section 8** summarizes the key findings from our analysis.

## 2. Methodology and Data Sources

- In general, the methodology consisted of the compilation, presentation and analysis of statistics for television and film production in the Prairie Provinces. In particular, we collected data on television production commissioned or financially supported by CBC/Radio-Canada, public broadcasters, CMF, CFFF, NFB and APTN.
- The statistics and analysis contained in this study are based on data sourced from public reports and special tabulations. Manitoba Film & Music (MFM), SaskFilm, Alberta Film, the Canadian Audiovisual Certification Office (CAVCO), CMF, Telefilm Canada, NFB and APTN all provided special tabulations that permitted us to directly analyze production activity in the Prairie Provinces across all languages; in some cases, the data permitted us to specifically analyze Francophone or Aboriginal production activity in the region. A complete list of data sources can be found at the end of the report.
- The analysis presents time-series (i.e., multi-year) statistics on the expenditures by broadcasters or public organizations that fund television or film production. Where data were available, we also presented the number of projects commissioned or supported by each broadcaster or organization and the total budgets of those supported projects. Where national-level data were also available for a particular times series, we were able to calculate each jurisdiction's share of the national total.

### Index tool

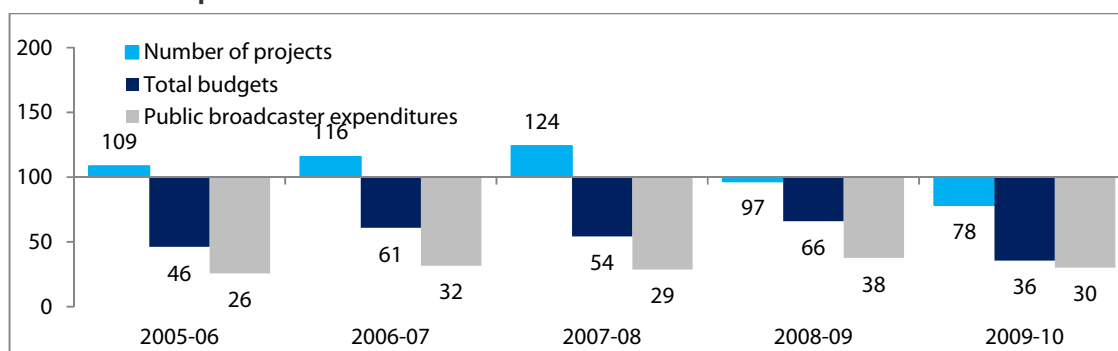
- In order to analyze a particular jurisdiction's share of production expenditures and activity (i.e., number of projects or total budgets), we used an index tool. This index tool related each jurisdiction's share of broadcaster expenditures or production activity to that jurisdiction's share of Canada's total population.
- It is not the intention of On Screen Manitoba, the Alberta Media Production Industries Association (AMPIA) and the Saskatchewan Motion Picture Industry Association (SMPIA) to call for production activity to be allocated on a per capita basis; however, comparing the level of production to the national audience share provides a useful measure for understanding production activity as a reflection of a diverse population.
- The share of Canada's total population was used to approximate each jurisdiction's share of the national audiovisual market. The premise of the index analysis was that a particular jurisdiction's share of broadcaster expenditures or production activity should, on average, be in proportion to its economic contribution to the national audiovisual industry. Since the

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

economic basis of the audiovisual industry is audience, population provides a suitable approximation of each jurisdiction's economic contribution.

- The resulting population ratio was then expressed as an index, where a value of 100 implied that the particular jurisdiction's share was in proportion to its share of the national population.

**Exhibit 1 – Example of index chart\***



\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

- An index value of below 100 implied that the jurisdiction was under-represented. For example, an index value of 30 for public-broadcaster expenditures (Exhibit 1) would indicate that a particular jurisdiction's share was equal to 30% of its share of national population. In other words, public broadcasters' expenditures were 70% below where they should have been on the basis of population.
- Conversely, an index value above 100 implied that the jurisdiction was over-represented. For example, an index of 124 for the number of projects (Exhibit 1) would indicate that a particular jurisdiction's project activity was 24% higher than its share of national population.
- The provincial, regional and national level data used to calculate each jurisdiction's percentage share and index value can be found in the Appendix.

### 3. CBC/Radio-Canada

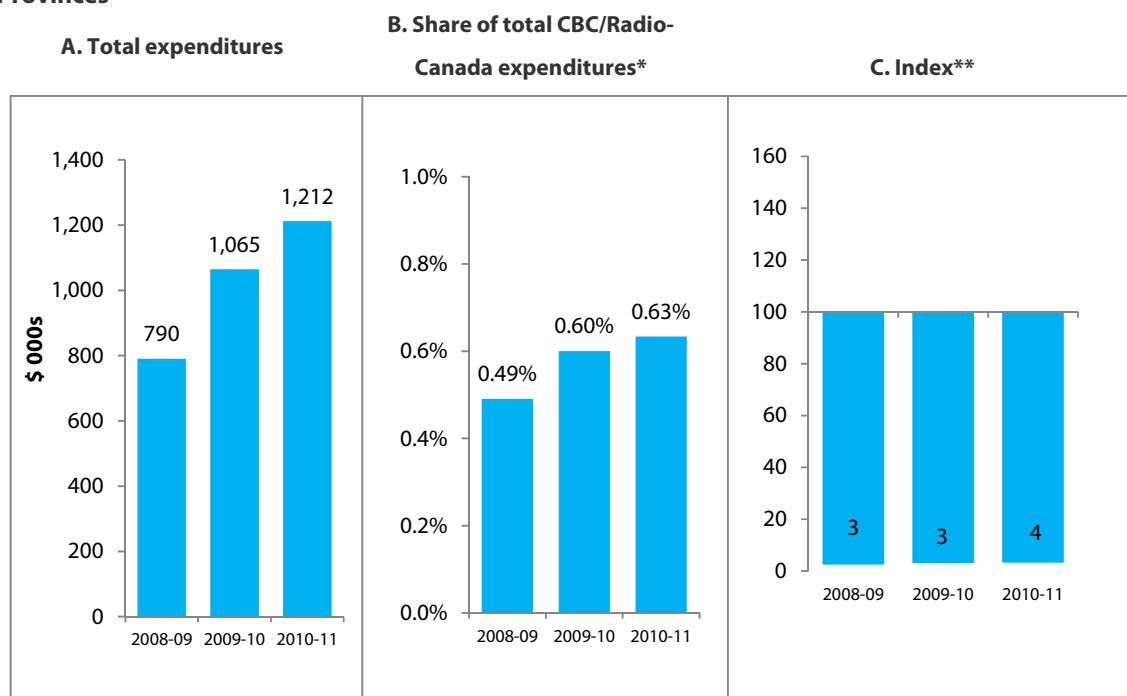
- In this section we analyze CBC/Radio-Canada's expenditures on independent production in the Prairie Provinces. We draw upon data from three separate sources – CRTC, provincial funding agencies and CAVCO – in order to create a statistical portrait of CBC/Radio-Canada's contribution to independent production in the Prairie Provinces on an overall basis.
- When using the CAVCO data, we examine public broadcasters' expenditures in general, as an approximation of CBC/Radio-Canada's commissioning activity; since the CAVCO data do not permit us to isolate CBC/Radio-Canada's expenditures from those of the provincial education broadcasters. We also examine public broadcasters' contribution to Francophone production in the region.

#### 3.1 CRTC data

- The CRTC offers statistics on CBC/Radio-Canada's conventional television services' expenditures on independent production by region. However, the CRTC data only go back to 2008-09, and furthermore, the data offer no breakdowns for Francophone production or Aboriginal production.
- According to statistics published in CRTC's *Conventional Television: Statistics and Financial Summaries*, CBC/Radio-Canada made expenditures of \$790,000 on programming acquired from independent producers in the Prairie Provinces during the 2008-09 broadcasting year (September 1, 2008 to August 31, 2009) (Exhibit 2A). These expenditures included licence fees and other eligible Canadian programming expenditures. During the 2009-10 broadcasting year, CBC/Radio-Canada's expenditures on acquired independent production in the Prairie Provinces was just over \$1.0 million; during the 2010-11 broadcasting year, it reached \$1.2 million.
- CBC/Radio-Canada's expenditures on independent production in the Prairie Provinces were very low on a share basis. Expenditures in the Prairie Provinces accounted for only 0.49% of CBC/Radio-Canada's total expenditures on acquired independent production in 2008-09 (Exhibit 2B). In 2009-10, the share was 0.60%, while in 2010-11, it was only 0.63%.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

### Exhibit 2 – CBC/Radio-Canada programming acquired from independent producers in the Prairie Provinces\*



Source: CRTC and Statistics Canada.

\* Share of CBC/Radio-Canada expenditures on programming acquired from independent producers.

\*\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

- CBC/Radio-Canada's expenditures on independent production in the Prairie Provinces can also be viewed using the index tool. In this case, the index value was equal to 3.0 (on a 100 scale) for both 2008-09 and 2009-10 (Exhibit 2C), and equal to 4.0 for 2010-11. This very low index values indicate that CBC/Radio-Canada's expenditures were well below the region's share of Canada's population, throughout the three-year period.

### 3.2 Data from provincial funding agencies

- The provincial funding agencies represent another source of data on production commissioned by CBC/Radio-Canada. These data may, in fact, provide a more accurate presentation of CBC/Radio-Canada's expenditures than the CRTC data, because they better reflect the location of *filming* rather than the location of the *producer*.
- That being said, the provincial-agency data are limited in terms of their time-series coverage: data are only available back to 2006-07 for Manitoba and back to 2008-09 for Alberta (no data are available as of yet for Saskatchewan). Furthermore, we are only able to calculate national shares and conduct an index analysis for two years – 2008-09 and 2009-10 – since data on

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

CBC/Radio-Canada's overall national expenditures on independent production are only publicly available for those two years.

### 3.2.1 Manitoba

- Statistics from MFM indicate that the total annual amount of broadcast licence fees paid by CBC/Radio-Canada for independent television productions filmed in Manitoba ranged from \$400,000 in 2006-07 to \$3.7 million in 2008-09 (Exhibit 3). MFM statistics also indicate that, during the 2006-07-to-2010-11 period, CBC/Radio-Canada commissioned between 4 and 13 projects per year. The total budgets of commissioned projects ranged from \$2.0 million in 2006-07 to \$21.3 million in 2007-08.
- Data for CBC/Radio-Canada's national total level of licence fees (i.e., programming expenditures) were only available for 2008-09 and 2009-10. As such, we are only able to calculate Manitoba's share for those two years. In 2008-09, Manitoba accounted for 2.3% of CBC/Radio-Canada's total national expenditures on independent production. In 2009-10, the share was 1.1%; in 2010-11, it was 1.5%.

#### Exhibit 3 – CBC/Radio-Canada-commissioned projects in Manitoba

	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>					
CBC/Radio-Canada licence fees (\$M)	0.4	3.3	3.7	1.9	2.9
Number of projects	4	13	9	10	7
<b>Total budgets of CBC/Radio-Canada projects (\$M)</b>					
	2.0	21.3	14.9	6.4	13.2
<b>Share of CBC/Radio-Canada national total</b>					
CBC/Radio-Canada licence fees	n.a.	n.a.	2.3%	1.1%	1.5%

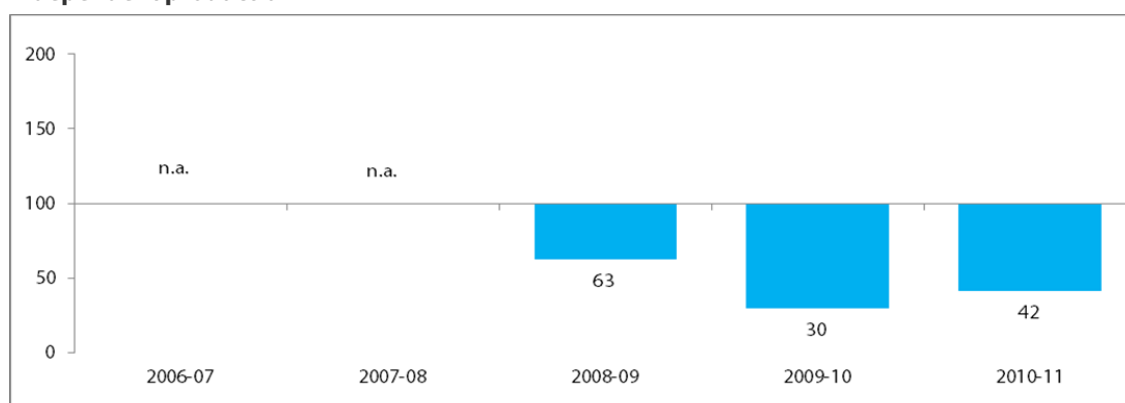
Source: Manitoba Film & Music and CRTC  
n.a. - data not available

- After adjusting for Manitoba's share of Canada's total population, the province appears to have been under-represented since 2008-09 in terms of its share of CBC/Radio-Canada's licence fees for independent production. The index in Exhibit 4 indicates that Manitoba's share of CBC/Radio-Canada's licence fees for independent production was 63% of its population share in 2008-09 (index = 63). In 2009-10, Manitoba's share was only 30% of its population share, and in 2010-11, it was 42%.



## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

### Exhibit 4 – Index of Manitoba’s share of CBC/Radio-Canada broadcast licence fees for independent production\*



Source: Manitoba Film & Music, CRTC and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

n.a. - data not available

### 3.2.2 Saskatchewan

- Statistics from SaskFilm indicate that CBC/Radio-Canada supported 20 projects in Saskatchewan between 2006-07 and 2010-11, with a total budget value of \$36.5 million. The total budgets of CBC/Radio-Canada projects in Saskatchewan ranged from a high of \$13.6 million in 2006-07, before dropping to a five-year low of \$3.7 million in the following year, 2007-08. In the three years following this, total budget values increased slowly to \$9.4 million in 2010-11. Data for the aggregate value of CBC/Radio-Canada licence fees for production in Saskatchewan were not available.

### Exhibit 5 – CBC/Radio-Canada-commissioned projects in Saskatchewan

	2006-07	2007-08	2008-09	2009-10	2010-11
Number of projects	4	3	5	3	5
Total budgets of CBC/Radio-Canada projects (\$M)	13.6	3.7	5.4	4.4	9.4

Source: SaskFilm and CRTC

Data not available for the CBC/Radio-Canada licence fees.

### 3.2.3 Alberta

- Statistics from Alberta Film indicate that CBC/Radio-Canada licence fees for independent production in Alberta totalled \$26.4 million in 2008-09, but then dropped to \$16.2 million in 2009-10 and \$16.7 million in 2010-11 (Exhibit 6). These licence fees supported between three and seven projects annually during the three-year period, 2008-09 to 2010-11. The total budgets of CBC/Radio-Canada-commissioned projects was \$44.6 million in 2008-09, but subsequently dropped to \$33.4 million in 2009-10 and \$29.5 million in 2010-11.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

### Exhibit 6 – CBC/Radio-Canada-commissioned projects in Alberta

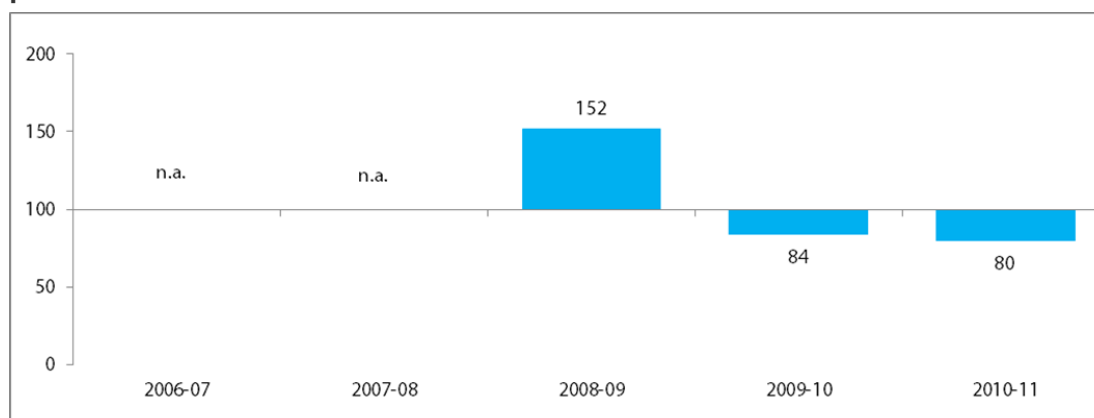
	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>					
CBC/Radio-Canada licence fees (\$M)	n.a.	n.a.	26.4	16.2	16.7
Number of projects	n.a.	n.a.	3	7	6
<b>Total budgets of CBC/Radio-Canada projects (\$M)</b>					
	n.a.	n.a.	44.6	33.4	29.5
<b>Share of CBC/Radio-Canada national total</b>					
CBC/Radio-Canada licence fees	n.a.	n.a.	16.4%	9.1%	8.7%

Source: Alberta Film and CRTC

n.a. - data not available

- When adjusted for Alberta's share of national population, we see that Alberta was over-represented in 2008-09 in terms of its share of CBC/Radio-Canada licence fees, but was under-represented in 2009-10 (Exhibit 7). With an index value of 152 in 2008-09, Alberta's share of CBC/Radio-Canada's total licence fees for independent production was 52% higher than its population share. With an index value of 84 in 2009-10, Alberta's share was equal to 84% of its population share, or 16% below what would be warranted by its population share. In 2010-11, Alberta's share of CBC/Radio-Canada licence fees was 20% below its population share (index value = 80).

### Exhibit 7 – Index of Alberta's share of CBC/Radio-Canada broadcast licence fees for independent production\*



Source: Alberta Film, CRTC and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

n.a. - data not available

### 3.3 CAVCO data

- Data from CAVCO provide another source of statistics that offer an *approximation* of CBC/Radio-Canada's expenditures on independent production in the Prairie Provinces. CAVCO data cannot provide a precise picture of CBC/Radio-Canada's regional expenditures on independent production, however. The CAVCO data lump together expenditures of CBC/Radio-Canada and other public broadcasters in Canada, i.e., provincial educational broadcasters such as SCN, TVOntario, TFO and TeleQuebec. While the CAVCO data do not allow us to separate out CBC/Radio-Canada from those other public broadcasters, they do permit us to generate tabulations by province and by language.
- In this section we analyze estimates of production activity and broadcaster expenditures (i.e., licence fees, equity and other financial contributions) associated with projects commissioned by public broadcasters. We view these estimates as an approximation of CBC/Radio-Canada activity in the Prairie Provinces. In the commissioning of independent production in Saskatchewan, it is important to note the significant role the public broadcaster, SCN, can play in addition to CBC/Radio-Canada, which is not analyzed in this report.

#### 3.3.1 Manitoba

- Public broadcasters commissioned between 10 and 20 television projects on an annual basis in Manitoba between 2005-06 and 2009-10 (). These annual levels of commissioning generated total production-budget levels of between \$8.6 million in 2009-10 and \$13.7 million in 2006-07. The annual levels of public broadcasters' expenditures during the five-year period ranged from \$1.9 million in 2005-06 to \$3.0 million in 2008-09.
- When Manitoba's levels of public broadcaster television production are compared to the national totals of public broadcaster production in Canada, we find that the province's share of commissioned projects was in the range of 2.8% to 4.5% (Exhibit 8). However, in terms of production budgets and public broadcasters' expenditures, the province's share ranged from only 0.9% to 2.4%.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

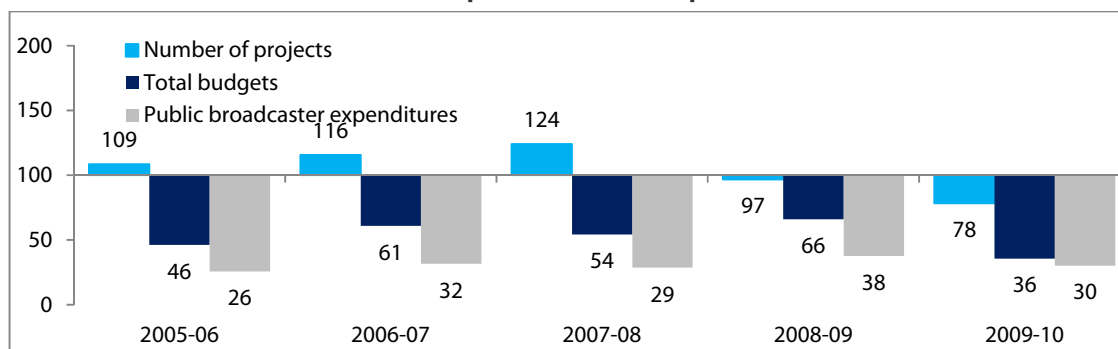
**Exhibit 8 – Public broadcaster production activity and expenditures in Manitoba**

	2005-06	2006-07	2007-08	2008-09	2009-10
<b>Amount</b>					
Number of projects	19	19	20	11	10
Total budgets (\$M)	9.6	13.7	13.6	14.6	8.6
Public broadcaster expenditures (\$M)	1.9	2.7	2.7	3.0	2.4
<b>Share of national total</b>					
Number of projects	4.0%	4.2%	4.5%	3.5%	2.8%
Total budgets	1.7%	2.2%	2.0%	2.4%	1.3%
Public broadcaster expenditures	0.9%	1.2%	1.0%	1.4%	1.1%

Source: Estimates based on data from CAVCO

- The index of Manitoba's share of public broadcaster production shows that while the province's share of commissioned projects was on par (i.e., index  $\approx$  100) with its share of national population, its share of production budgets and public broadcaster expenditures (i.e., licence fees) was consistently less than proportionate (i.e., index  $<$  100) (Exhibit 9). In fact, in terms of public broadcaster expenditures, Manitoba's share was typically equal to 30% of its population share (i.e. index = 30).

**Exhibit 9 – Index of Manitoba's share of public broadcaster production in Canada\***



Source: Estimates based on data from CAVCO and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

### 3.3.2 Saskatchewan

- In Saskatchewan, the annual number of public broadcaster projects rose to 28 in 2007-08, before dropping to 16 in 2009-10 (Exhibit 10). The total budgets associated with public broadcaster projects fluctuated significantly between 2005-06 and 2009-10: increasing to \$33.1 million in 2006-07 and dropping to as low as \$8.4 million in 2009-10. Public broadcaster expenditures followed the fluctuations in budgets. They were as high as \$7.5 million in 2006-07 and as low as \$1.3 million in 2009-10.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

- Saskatchewan's share of the national total of public broadcaster projects ranged between 4.2% in 2005-06 and 6.4% in 2008-09; however, its shares of public broadcaster expenditures were lower: ranging from 0.6% in 2009-10 to 3.3% in 2006-07.

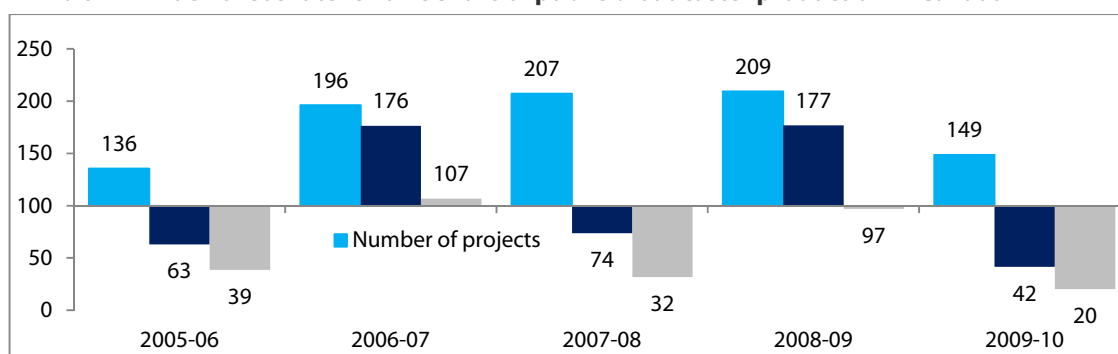
**Exhibit 10 – Public broadcaster production activity and expenditures in Saskatchewan**

	2005-06	2006-07	2007-08	2008-09	2009-10
<b>Amount</b>					
Number of projects	20	27	28	20	16
Total budgets (\$M)	11.1	33.1	15.5	32.8	8.4
Public broadcaster expenditures (\$M)	2.4	7.5	2.5	6.5	1.3
<b>Share of national total</b>					
Number of projects	4.2%	6.0%	6.3%	6.4%	4.5%
Total budgets	1.9%	5.4%	2.2%	5.4%	1.3%
Public broadcaster expenditures	1.2%	3.3%	1.0%	3.0%	0.6%

Source: Estimates based on data from CAVCO

- The index of Saskatchewan's share of public broadcaster production indicates that the province's share of commissioned projects was typically in excess of its share of national population (Exhibit 11). Its share of total budgets fluctuated above and below par. Its share of public broadcaster expenditures was typically lower than its population share; although it was on par in 2006-07 and 2008-09, with index values of 107 and 97, respectively.

**Exhibit 11 – Index of Saskatchewan's share of public broadcaster production in Canada\***



Source: Estimates based on data from CAVCO and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

### 3.3.3 Alberta

- While Alberta's number and share of public broadcaster projects decreased in 2008-09 and 2009-10, its levels and shares of total budgets and public broadcaster expenditures increased significantly in those years (Exhibit 12). The number of public-broadcaster-commissioned projects dropped from 19 in 2007-08 to 6 in 2008-09 and 8 in 2009-10. Meanwhile, total budgets were \$54.1 million in 2008-09 and \$42.3 million in 2009-10. Public broadcaster

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

expenditures were \$17.0 million in 2008-09, accounting for 8.9% of the national total; in 2009-10, public broadcaster expenditures were \$10.7 million, or 5.0% of the national total.

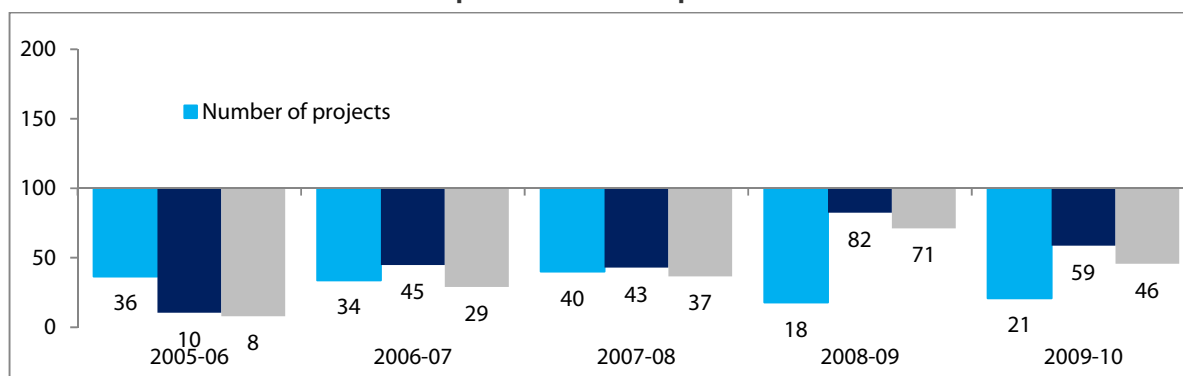
- Despite the relatively high levels and shares of public broadcaster production and expenditures displayed by Alberta in comparison to the other Prairie Provinces between 2005-06 and 2009-10, the province was still significantly under-represented on a population-adjusted basis (Exhibit 13). Its index of public broadcaster expenditures rose to 71 in 2008-09, before dropping to 46 in 2009-10. In other words, the province's share of total public broadcaster expenditures in 2009-10 was approximately one-half of its share of the national population. The province's index for the number of projects and total budgets were consistently below 100 during the five-year period, thus indicating that Alberta was under-represented in terms of public broadcaster production activity.

**Exhibit 12 – Public broadcaster production activity and expenditures in Alberta**

	2005-06	2006-07	2007-08	2008-09	2009-10
<b>Amount</b>					
Number of projects	18	16	19	6	8
Total budgets (\$M)	6.1	29.0	31.6	54.1	42.3
Public broadcaster expenditures (\$M)	1.7	7.1	10.2	17.0	10.7
<b>Share of national total</b>					
Number of projects	3.8%	3.5%	4.3%	1.9%	2.3%
Total budgets	1.1%	4.7%	4.6%	8.9%	6.4%
Public broadcaster expenditures	0.8%	3.0%	3.9%	7.7%	5.0%

Source: Estimates based on data from CAVCO

**Exhibit 13 – Index of Alberta's share of public broadcaster production in Canada\***



Source: Estimates based on data from CAVCO and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

### 3.3.4 Manitoba Francophone

- In this sub-section, we examine public broadcasters' support for Francophone (or "Francophone") production in Manitoba. Public broadcasters' Francophone production in the Prairie Provinces was confined to Manitoba.<sup>2</sup> Between 2005-06 and 2009-10, the annual number of Francophone projects was between four and seven. Annual production budgets ranged from \$3.8 million in 2005-06 and \$7.5 million in 2006-07; while public broadcaster expenditures ranged from \$700,000 in 2005-06 and 2008-09, to \$2.1 million in 2006-07.

**Exhibit 14 – Public broadcaster's Francophone production in Manitoba**

	2005-06	2006-07	2007-08	2008-09	2009-10
<b>Amount</b>					
Number of projects	7	7	8	4	5
Total budgets (\$M)	3.8	7.5	6.6	5.5	5.3
Public broadcaster expenditures (\$M)	0.7	2.1	1.3	0.7	1.4
<b>Share of national total</b>					
Number of projects	2.9%	3.2%	3.8%	2.3%	2.7%
Total budgets (\$M)	1.5%	2.7%	2.4%	1.8%	1.8%
Public broadcaster expenditures (\$M)	0.7%	1.7%	1.0%	0.5%	1.1%

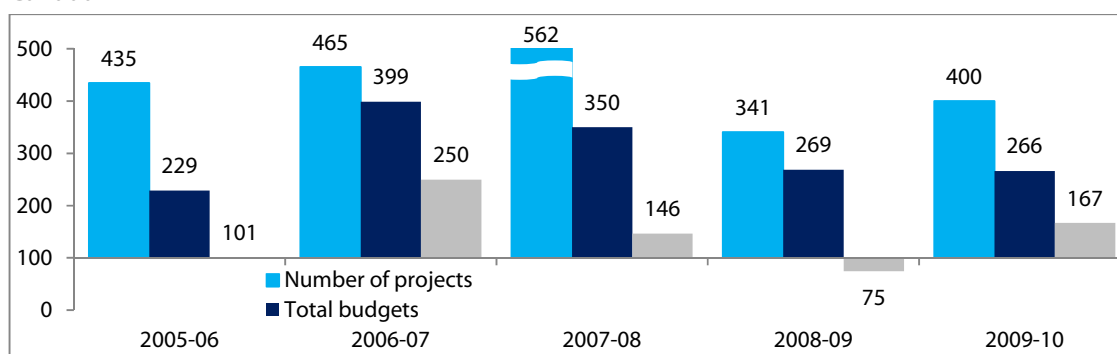
Source: Estimates based on data from CAVCO

- An index that compares Manitoba's share of public broadcasters' Francophone production to its share of Canada's overall Francophone population indicates that the province was significantly over-represented in terms of projects and total budgets. The province's share of public broadcasters' expenditures was typically on par with its share of Canada's Francophone population (i.e., index  $\approx$  100), or even significantly higher in certain years, 2006-07 (index = 250) and 2009-10 (index = 167).
- It should be noted that Manitoba is the only Prairie province with an active Francophone production company, so it is not surprising that Manitoba might have a higher level of francophone production than Alberta and Saskatchewan.

<sup>2</sup> The CAVCO data indicate that public broadcasters did not commission Francophone television projects in the other Prairie Provinces between 2005-06 and 2009-10; so we only examine Manitoba in this sub-section.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

**Exhibit 15 – Index of Manitoba’s share of public broadcaster’s Francophone production in Canada\***



Source: Estimates based on data from CAVCO and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction’s share is in proportion to its share of Canada’s population.

### 3.4 Summary

- While the CRTC does publish regional data for CBC/Radio-Canada’s expenditures on independent production, data from other sources – namely provincial funding agencies and CAVCO – is likely to provide a better indication of Prairie Provinces’ share of CBC/Radio-Canada’s expenditures on independent production.
- CRTC statistics indicate that CBC/Radio-Canada’s acquisition of independent production in the Prairie Provinces was only \$790,000 in 2008-09 and \$1.1 million in 2009-10. However, these data from CRTC may not fully reflect the location of production, and must be considered alongside data from other sources as done in this report.
- Detailed statistics supplied by the provincial funding agencies in Manitoba and Alberta indicate that CBC/Radio-Canada’s expenditures on independent production were in the millions in each province. In Manitoba, CBC/Radio-Canada’s expenditures were only \$400,000 in 2006-07, however, they were in the range of \$1.9 million to \$3.3 million on an annual basis between 2007-08 and 2010-11. Data from Alberta Film point to annual expenditures by CBC/Radio-Canada of \$16.2 million to \$26.4 million in the province between 2008-09 and 2010-11.
- Based on these levels of expenditures, Manitoba is unambiguously under-represented in terms of its share of CBC/Radio-Canada’s national expenditures on independent production. Alberta’s proportional share varies from year to year: in 2008-09 it was over-represented by 52%; in 2009-10, it was just slightly under-represented.
- The data from CAVCO for all public broadcasters’ expenditures are more consistent with the provincial funding agency data than the CRTC statistics. These data also indicate that Manitoba was under-represented in terms of its share of public broadcaster expenditures. The CAVCO



## **Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces**

data also show that Alberta was clearly under-represented between 2005-06 and 2009-10 in terms of public broadcaster expenditures.

- For Saskatchewan, the CAVCO data point to a mixed historical record. Production activity (budgets and number of projects) fluctuated between periods of over- and under-representation; however, the province's share of public broadcaster spending was either on par or below par (i.e., below proportion) between 2005-06 and 2009-10. Saskatchewan's stronger performance vis-à-vis the other Prairie Provinces may have been due to the role of SCN, which would be captured by CAVCO data.
- While the CAVCO data also indicates that Manitoba's annual levels' of public broadcaster Francophone production and expenditures were in excess of its share of Canada's Francophone population, this type of over-representation would have been expected for a culturally significant minority-language community seeking to retain its unique cultural identity within a predominantly English-language environment. This is also consistent with a single Francophone production company located in Manitoba and none predominating in either Alberta or Saskatchewan.

## 4. Canada Media Fund

- Outside of Canadian broadcasters, the CMF is the largest single source of funding for Canadian television production. In 2010-11, the CMF provided \$282 million in financial support to Canadian television production through its Convergent Stream funding program.<sup>3</sup> While the CMF does support in-house production, the vast majority of its support goes to independent production.
- Supporting regional production is an important aspect of CMF's mandate. Indeed, the CMF's Contribution Agreement with the Department of Canadian Heritage stipulates that it will "ensure funding support to regional television convergent productions." However, the CMF's definition of regional production is essentially any production occurring 150 km outside of Toronto or Montreal.
- As part of a further effort to ensure minimum levels of regional production, the CMF introduced the Production Incentive Pilot Program in 2008-09. Under this program – which was renamed the English Production Incentive (EPI) in 2009-10 – the Canadian production market is divided into five regions: Atlantic Canada; Quebec; Ontario and Nunavut; Prairie Provinces; and British Columbia, Yukon and Northwest Territories. Should television production activity in any of these five regions drop by more than 20% below its five-year average, the CMF may intervene through the EPI in the following fiscal year, by providing additional financial support to Convergent Stream production.<sup>4</sup> According to CMF, Alberta and Manitoba both qualified as recipients of EPI funding during the 2011-12 fiscal year.<sup>5</sup>
- The CMF also maintains programs to support Francophone programming outside of Quebec and Aboriginal production. The Francophone Minority Program funds Convergent Stream projects made by Francophone producers located outside of Quebec.<sup>6</sup> The CMF's Aboriginal Program is designed to support the growth of Aboriginal production by taking into account the unique circumstances of the Aboriginal production.<sup>7</sup>
- In this section of the report we analyze the Prairie Provinces' share of CMF funding and CMF-supported production. We examine each Prairie Provinces' share of the annual amount of CMF Convergent Stream funding, the number of CMF-supported Convergent Stream projects, and

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<sup>3</sup> CMA et. al, *Profile 2011: An Economic Report on the Canadian Screen-based Production Industry*, February 2012, p. 41.

<sup>4</sup> <http://www.cmf-fmc.ca/funding-programs/convergent-stream/english-production-incentive/?setLocale=1>

<sup>5</sup> <http://www.cmf-fmc.ca/funding-programs/convergent-stream/english-production-incentive/?setLocale=1>

<sup>6</sup> <http://www.cmf-fmc.ca/funding-programs/convergent-stream/francophone-minority/>

<sup>7</sup> <http://www.cmf-fmc.ca/funding-programs/convergent-stream/aboriginal/>

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

the total production budgets supported by this Convergent Stream funding between 2007-08 and 2010-11.

- We also analyze Manitoba's share of CMF Convergent Stream Francophone production (i.e., Francophone production)<sup>8</sup> and Aboriginal production across the Prairie Provinces on an aggregate basis.

### 4.1 Manitoba

- Between 2007-08 and 2010-11, the annual levels of CMF funding in Manitoba ranged from \$3.5 million to \$9.3 million (Exhibit 16). This CMF funding supported between 12 and 17 projects, annually, and total annual budgets ranging from \$10.0 million to \$26.9 million. Manitoba's share of the CMF's total national funding and supported production activity was between 1.1% and 3.6%, between 2007-08 and 2010-11.

**Exhibit 16 – CMF Convergent Stream production activity and funding in Manitoba**

	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>				
Value of CMF Convergent-Stream funding (\$M)	5.5	3.5	9.3	4.8
Number of projects	13	12	17	15
Total budgets of Convergent Stream projects (\$M)	19.2	10.0	26.9	15.2
<b>Share of CMF national total</b>				
Value of CMF Convergent-Stream funding	2.3%	1.3%	3.0%	1.7%
Number of projects	2.8%	2.5%	3.6%	3.3%
Total budgets of Convergent Stream projects	2.2%	1.1%	2.6%	1.5%

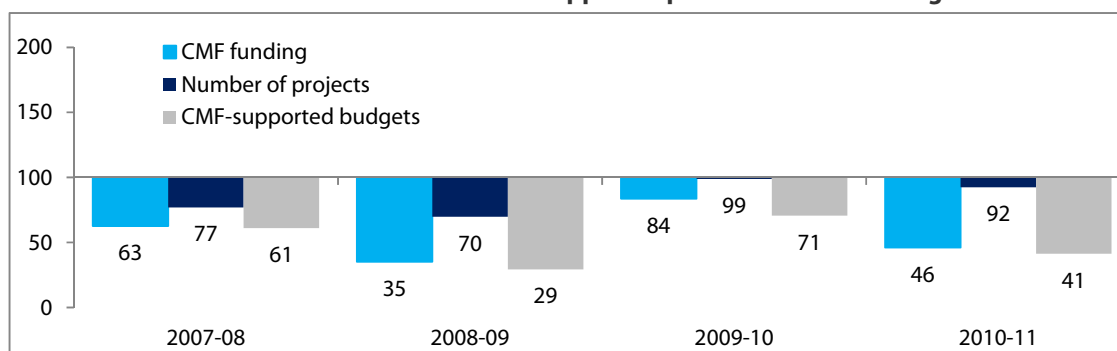
Source: CMF

- After adjusting for population, Manitoba was under-represented in terms of CMF funding and supported production budgets between 2007-08 and 2010-11; although, its share of projects was in line with its population share in 2009-10 and 2010-11. On an index basis, Manitoba's share of CMF funding and CMF-supported production budgets was consistently below 100, between 2007-08 and 2010-11 (Exhibit 17). In terms of the number of projects, Manitoba's index was just under 100 in both 2009-10 and 2010-11.

<sup>8</sup> The levels of CMF-supported Francophone production in the other Prairie Provinces were zero, between 2007-08 and 2010-11.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

**Exhibit 17 – Index of Manitoba’s share of CMF-supported production and funding\***



Source: CMF and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

### 4.2 Saskatchewan

- In Saskatchewan, the annual levels of CMF funding ranged from \$2.1 million to \$5.7 million between 2007-08 and 2010-11 (Exhibit 18). This CMF funding supported between 9 and 17 projects annually, and total annual budgets ranging from \$8.2 million in 2009-10 to \$15.9 million in 2007-08. Saskatchewan's share of the CMF's total national funding and supported production activity was between 0.7% and 3.6%, between 2007-08 and 2010-11.

**Exhibit 18 – CMF Convergent Stream production activity and funding in Saskatchewan**

	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>				
Value of CMF Convergent-Stream funding (\$M)	3.5	3.3	2.1	5.7
Number of projects	17	16	14	9
Total budgets of Convergent Stream projects (\$M)	15.9	11.6	8.2	14.9
<b>Share of CMF national total</b>				
Value of CMF Convergent-Stream funding	1.8%	1.3%	0.7%	1.0%
Number of projects	3.6%	3.4%	2.9%	2.0%
Total budgets of Convergent Stream projects	1.8%	1.2%	0.8%	1.5%

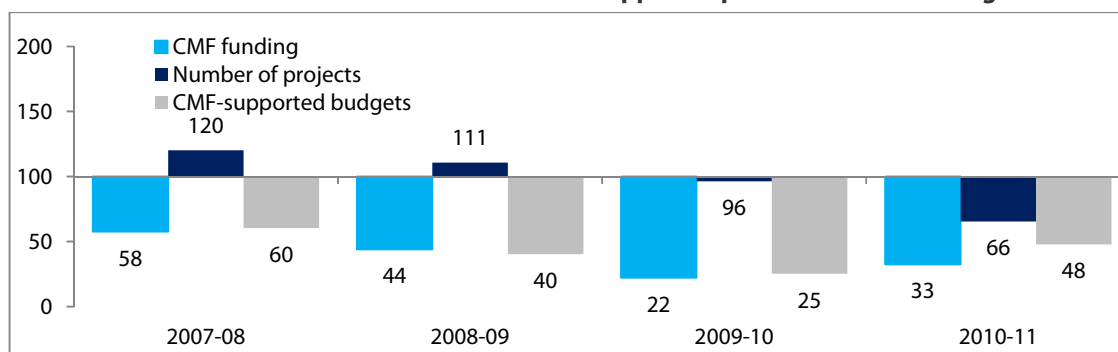
Source: CMF

- When adjusted by population, Saskatchewan was generally under-represented in terms of CMF funding and supported production budgets between 2007-08 and 2010-11; although, its share of the number of projects was in line with its population share in 2007-08, 2009-10 and 2010-11. On an index basis, Saskatchewan's share of CMF funding and CMF-supported production budgets was consistently below 100, between 2007-08 and 2010-11 (Exhibit 19). Indeed, in 2009-10, Saskatchewan's share of CMF funding and supported production was approximately one-quarter of its population share (i.e., index  $\approx$  25). In terms of the number of projects,

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

Saskatchewan's index was above 100 in both 2007-08 and 2008-09, before dipping below 100 in 2009-10, and dropping to 66 in 2010-11.

**Exhibit 19 – Index of Saskatchewan's share of CMF-supported production and funding\***



Source: CMF and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

### 4.3 Alberta

- Alberta's annual levels of CMF funding ranged from \$8.9 million to \$21.8 million, between 2007-08 and 2010-11 (Exhibit 20). This CMF funding supported between 9 and 18 projects, annually, and total annual budgets ranging from \$27.2 million in 2010-11 to \$67.4 million in 2008-09. Alberta's share of the CMF's total national funding and supported production activity was between 2.0% and 8.2%, between 2007-08 and 2010-11.
- While Alberta displayed the highest levels of CMF funding and supported production activity among the Prairie Provinces between 2007-08 and 2010-11, when adjusted by its share of Canada's population, it was significantly under-represented. Between 2007-08 and 2009-10, Alberta's index values were consistently below 100 and often below 50 for its share of CMF funding, number of projects and CMF-supported production budgets (Exhibit 21). Indeed, in 2010-11, Alberta's share of CMF funding and supported production was one-quarter of its share of national population (i.e., index = 25).

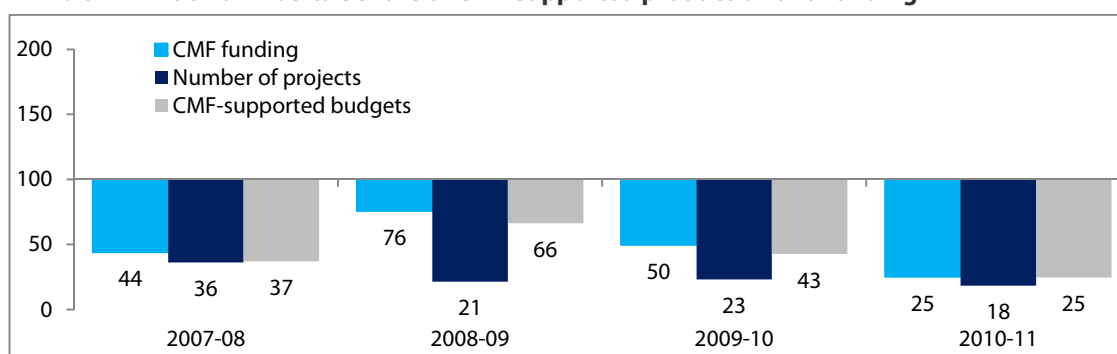
## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

**Exhibit 20 – CMF Convergent Stream production activity and funding in Alberta**

	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>				
Value of CMF Convergent-Stream funding (\$M)	11.5	21.8	15.1	8.9
Number of projects	18	11	12	9
Total budgets of Convergent Stream projects (\$M)	34.3	67.4	49.2	27.2
<b>Share of CMF national total</b>				
Value of CMF Convergent-Stream funding	4.7%	8.2%	5.4%	2.7%
Number of projects	3.9%	2.3%	2.5%	2.0%
Total budgets of Convergent Stream projects	3.9%	7.1%	4.7%	2.7%

Source: CMF

**Exhibit 21 – Index of Alberta’s share of CMF-supported production and funding\***



Source: CMF and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

### 4.4 Manitoba Francophone

- Among the Prairie Provinces, Manitoba was the only one where the CMF funded Francophone production between 2007-08 and 2010-11. CMF funding for Francophone production in Manitoba ranged from \$1.3 million in 2008-09 to \$2.4 million in 2009-10 (Exhibit 22). This funding supported annual levels of production of between \$3.4 million in 2008-09 and \$7.2 million in 2009-10. These funding and production levels accounted for between 1.1% and 2.6% of CMF's total national Francophone production.

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

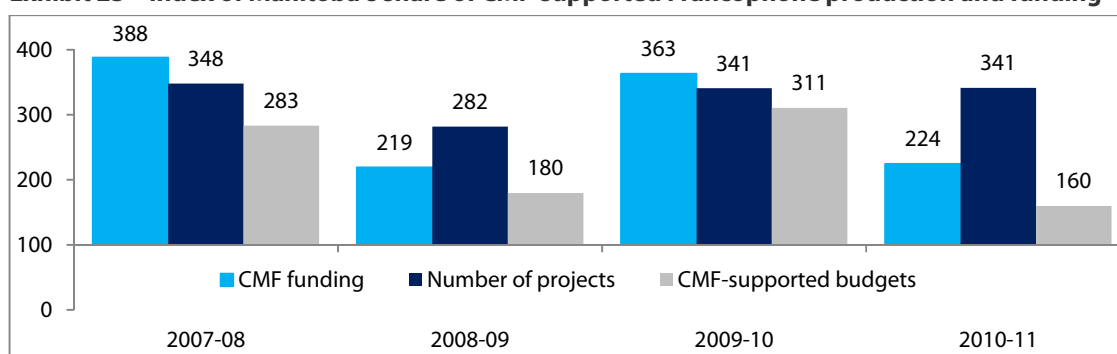
**Exhibit 22 – Francophone CMF Convergent Stream production activity and funding in Manitoba**

	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>				
Value of CMF Convergent-Stream funding (\$M)	2.2	1.3	2.4	1.5
Number of projects	5	4	5	5
Total budgets of Convergent Stream projects (\$M)	5.1	3.4	7.2	3.7
<b>Share of CMF national total</b>				
Value of CMF Convergent-Stream funding	2.6%	1.5%	2.5%	1.5%
Number of projects	2.4%	1.9%	2.3%	2.3%
Total budgets of Convergent Stream projects	1.9%	1.2%	2.1%	1.1%

Source: CMF

- While Manitoba's share of overall CMF funding for Francophone production was below 3.0%, when viewed in relation to the province's share of national Francophone population, it was consistently over-represented between 2007-08 and 2010-11. In terms of CMF funding, number of projects and supported production budgets, Manitoba's index values were well above 100 in all four fiscal years (Exhibit 23). In some cases, the index was well above 300; thus indicating that Manitoba's share of Francophone production was over three times its share of Canada's overall Francophone population. Again this points to the relatively few production companies working in French outside of Québec and to the existence of a single production company working in Manitoba with none predominating in Alberta and Saskatchewan. Also this policy is reflective of Canadian Federal official languages and broadcasting policy to support production opportunities in French in francophone minority language communities across Canada.

**Exhibit 23 – Index of Manitoba's share of CMF-supported Francophone production and funding\***



Source: CMF and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

#### 4.5 Aboriginal production

- The CMF also supports Aboriginal production through its Convergent Stream funding. Between 2007-08 and 2010-11, the Prairie Provinces received between \$700,000 and \$1.2 million in CMF funding for Aboriginal production (Exhibit 24). These funding levels accounted for between 21.6% and 38.6% of CMF's total funding of Aboriginal production during that period, and supported between \$2.3 million and \$5.3 million in total production budgets.

**Exhibit 24 – CMF Convergent Stream production activity and funding in Aboriginal production in the Prairie Provinces**

	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>				
Value of CMF Convergent-Stream funding (\$M)	0.7	1.2	1.2	1.3
Number of projects	3	5	3	4
Total budgets of Convergent Stream projects (\$M)	2.3	4.5	5.3	3.2
<b>Share of CMF national total</b>				
Value of CMF Convergent-Stream funding	24.2%	38.6%	29.0%	21.6%
Number of projects	16.7%	29.4%	18.8%	23.5%
Total budgets of Convergent Stream projects	27.5%	46.6%	36.6%	25.8%

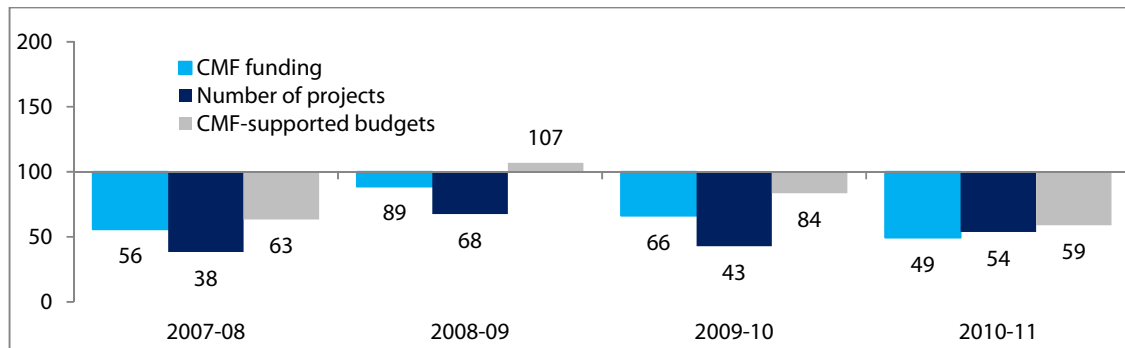
Source: CMF

- While the Prairie Provinces' share of CMF funding for Aboriginal production was above 20% throughout the 2007-08-to-2010-11 period, when adjusted for its share of Canada's Aboriginal population, the region was actually under-represented. In terms of CMF funding, number of projects and total supported production budgets, the Prairie Provinces' index values were, with one exception, generally below 100 (Exhibit 25). Indeed, in 2010-11, the Prairie Provinces' share of CMF funding for Aboriginal production was approximately one-half (i.e., index = 49) of its share of Canada's Aboriginal population.



## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

**Exhibit 25 – Index of Prairie Provinces’ share of CMF-supported Aboriginal production & funding\***



Source: CMF and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

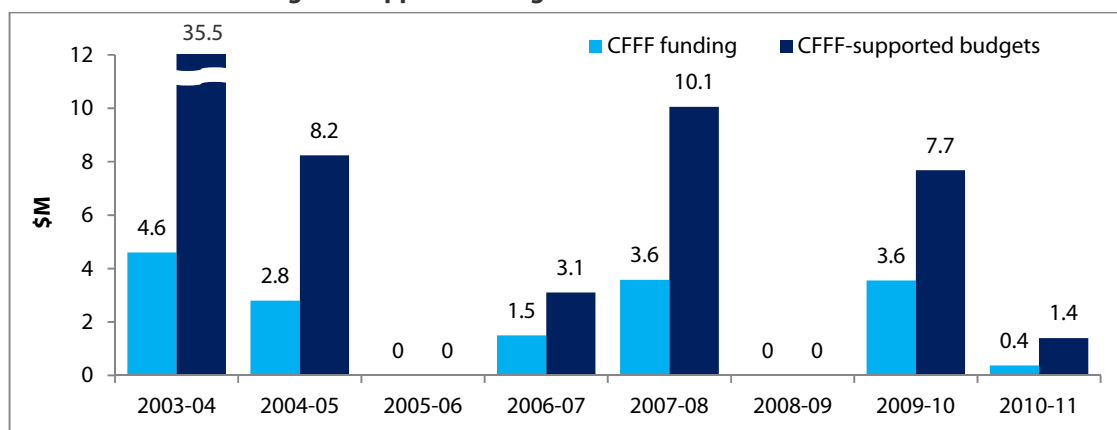
### 4.6 Summary

- While the CMF has adopted programs in recent years to maintain a balance of production across Canada's regions, the data clearly show that each of the Prairie Provinces was under-represented between 2007-08 and 2010-11 in terms of its share of Convergent Stream funding. Alberta was the most severely under-represented, with its share of funding equal to between two-thirds and one-quarter of its population share. In many cases, the Prairie Provinces' under-representation in share of CMF funding translated into under-representation in terms of the number of CMF projects and total value of CMF-supported budgets.
- The CMF has also implemented programs to support Francophone production outside of Quebec and Aboriginal production. Manitoba's share of CMF-supported Francophone production and funding was well above its share of Canada's Francophone population between 2007-08 and 2010-11. However, with regards to Aboriginal production, the Prairie Provinces' were under-represented: their share of CMF funding and production in the Aboriginal segment was approximately one-half their share of population (i.e., index  $\approx$  50) in two of the four years analyzed, 2007-08 and 2010-11.

## 5. Canada Feature Film Fund

- The CFFF, which is administered by Telefilm Canada, is the largest single source of public funding for Canadian feature film production. In 2010-11, the CFFF disbursed \$65.2 million in funding to Canadian feature films.<sup>9</sup> This CFFF funding attracted an additional \$147.1 million in financing from Canadian and foreign distributors, tax credits, provincial funding and Canadian broadcasters.<sup>10</sup>
- Data from the CFFF are only available at a regional level for the Prairie Provinces; i.e., data are not available for the individual Prairie Provinces. What is more, Telefilm Canada combines the data for the Territories with the Prairie Provinces. As such, it is not possible to obtain an accurate picture of production trends exclusively in the Prairie Provinces, on the whole or by language.
- Between 2003-04 and 2010-11, CFFF funding for feature films in the *Prairie Provinces and Territories* fluctuated significantly. Indeed, in two years during the eight-year period the Prairie Provinces and Territories received no CFFF funding. The annual amount of CFFF funding distributed to feature films produced in the Prairie Provinces and Territories ranged from \$4.6 million in 2003-04 to zero in 2005-06 and 2008-09 (Exhibit 26). The total budgets CFFF-supported feature films produced in the Prairie Provinces ranged from \$35.5 million in 2003-04 to zero in 2005-06 and 2008-09.

**Exhibit 26 – CFFF funding and supported budgets in the Prairie Provinces and Territories**



Source: Telefilm Canada

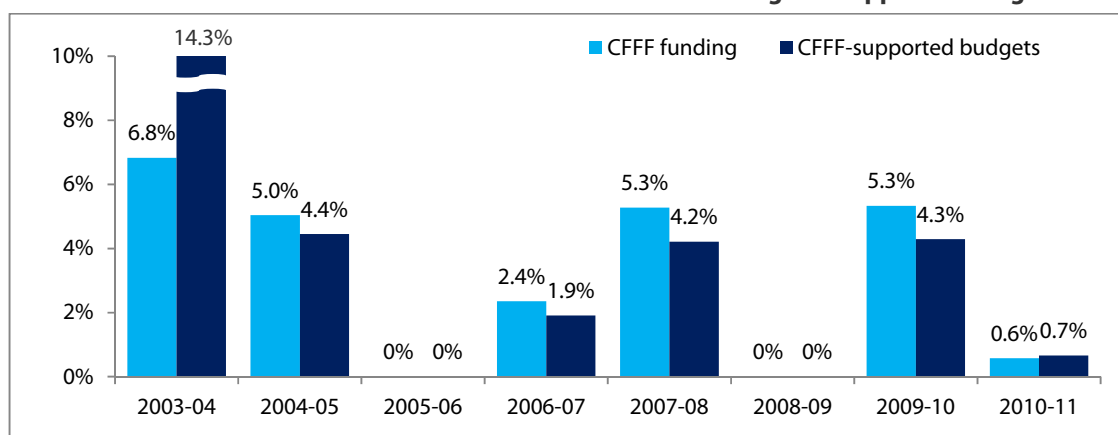
<sup>9</sup> CMPA et. al, *Profile 2011: An Economic Report on the Canadian Screen-based Production Industry*, February 2012, p. 65.

<sup>10</sup> *Ibid.*

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

- On a percentage basis, CFFF funding in the Prairie Provinces and Territories accounted for as much as 6.8% of the national total in 2003-04 and as little as zero in 2005-06 and 2009-09 (Exhibit 27). While the share of production budgets was as high as 14.3% in 2003-04, in the other years during the eight-year period, the share never exceeded 5%.

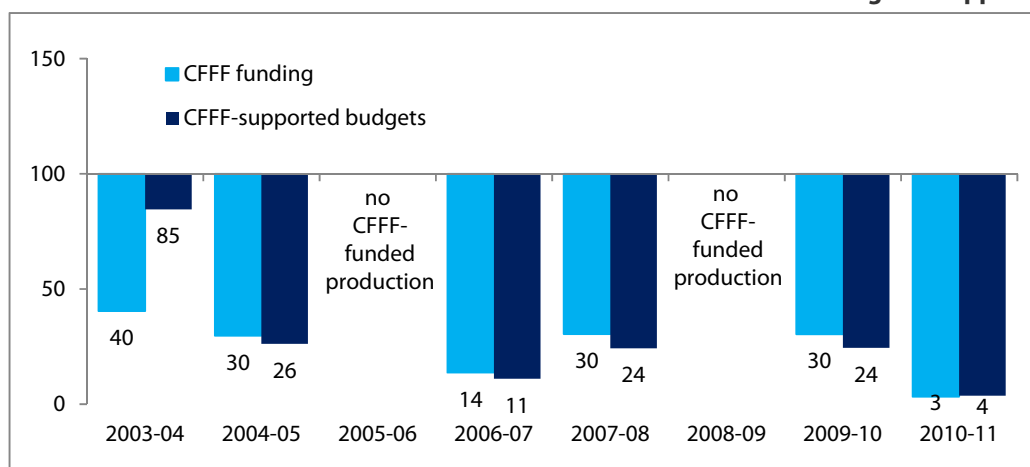
**Exhibit 27 – Prairie Provinces and Territories’ share of CFFF funding and supported budgets**



Source: Telefilm Canada

- On an index basis, the Prairie Provinces and Territories’ share of CFFF funding and production activity was consistently below their proportionate share. In terms of CFFF funding, the index only reached a high of 40 in 2003-04 (Exhibit 28); thereafter, it was never above 30. In other words, the Prairie Provinces and Territories’ share of CFFF funding was usually 30% of what it should have been based on those regions’ share of the Canada’s population. The Prairie Provinces and Territories’ share of CFFF production activity was also typically one-quarter (i.e., index  $\approx$  25) of what it should have been, based on the regions’ population share; although the index did reach 85 in 2003-04.

**Exhibit 28 – Index of Prairie Provinces and Territories’ share of CFFF funding and supported budgets\***



Source: Telefilm Canada and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction’s share is in proportion to its share of Canada’s population.

### **Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces**

- CFFF funding for feature films in the *Prairie Provinces and Territories* fluctuated dramatically between 2003-04, from a high of \$4.6 million in 2003-04 to a low of zero funding in the two years 2005-06 and 2008-09. The share of CFFF funding for the *Prairie Provinces and Territories* never exceeded 6.8% of the national total, and twice received zero funding. On an index basis, the *Prairie Provinces and Territories'* share of CFFF funding and production activity was consistently below its national share.

## 6. National Film Board of Canada

- The National Film Board of Canada (NFB), an agency of the Government of Canada reporting to the Department of Canadian Heritage, is Canada’s public film producer and distributor. In 2010-11, the NFB provided a total of \$12.7 million in funding for both in-house projects and coproductions with independent producers. This level of funding was down from a high of \$21.4 million in 2007-08.
- Data from the NFB are only available at a regional level for the Prairie Provinces; i.e., data are not available for the individual Prairie Provinces. As such, it is not possible to provide individual analysis of each of the Prairie Provinces. However, NFB data are available on a language basis and for Aboriginal production. In this section, we examine separately NFB’s level of support for financial production in the Prairie Provinces across all languages and in the French language. We also examine regional data for NFB-supported Aboriginal production.

### 6.1 All languages

- In this section, we analyze the NFB’s support for film production in the Prairie Provinces across all languages. The NFB supports Canadian filmmakers (i.e., documentarians and animators) through both in-house production and coproductions with independent producers. We examine these types of NFB production separately.

#### 6.1.1 In-house production

- Between 2006-07 and 2010-11, the annual value of NFB in-house production in the Prairie Provinces ranged from \$1.0 million to \$1.4 million (Exhibit 29). With between 5 and 11 in-house projects, annually, the Prairie Provinces accounted for between 6.8% and 15.5% of total NFB in-house titles, and between 6.8% and 12.9% of NFB funding.

**Exhibit 29 – NFB-supported in-house production in Prairie Provinces**

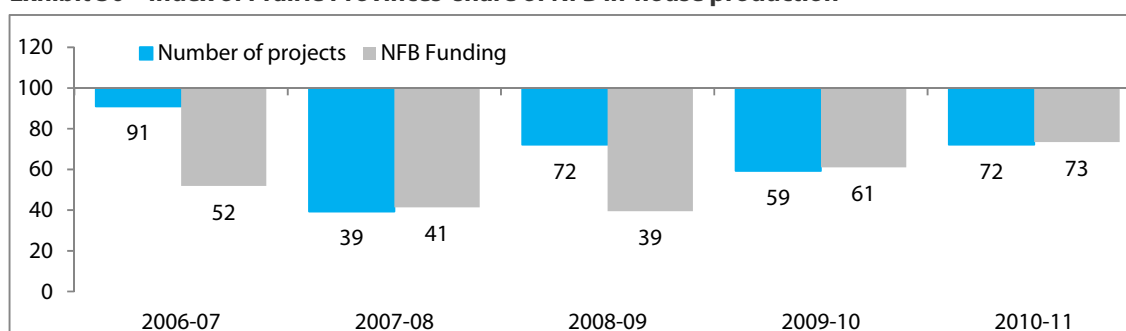
	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>					
Number of titles	11	5	5	6	10
NFB funding (\$M)	1.1	1.1	1.0	1.4	1.2
<b>Share of national total (%)</b>					
Number of projects	15.5%	6.8%	12.5%	10.3%	12.7%
NFB funding	8.8%	7.1%	6.8%	10.6%	12.9%

Source: NFB

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

- On an index basis, the Prairie Provinces' share of NFB in-house production remained relatively steady and low. In terms of NFB in-house production funding, the index only reached a high of 73 in 2010-11; thereafter, it ranged from 39 to 61 (Exhibit 30). In other words, the Prairie Provinces' share of NFB in-house production funding was usually 39% to 61% of what it should have been based on the regions' share of Canada's population. The Prairie Provinces' share of the number of NFB in-house productions funded fluctuated more dramatically, ranging from an index of 91 in 2006-07 to 39 the following year in 2007-08.

**Exhibit 30 – Index of Prairie Provinces' share of NFB in-house production**



Source: National Film Board of Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

### 6.1.2 Coproduction

- Between 2006-07 and 2010-11, the NFB provided between \$1.6 million and \$1.8 million, annually, in funding for coproductions with independent producers in the Prairie Provinces (Exhibit 31). Depending on the year, these levels of coproduction funding represented between 8.0% and 14.5% of the NFB's total national coproduction funding.

**Exhibit 31 – NFB-supported coproduction in Prairie Provinces**

	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Amount</b>					
Number of titles	7	9	3	13	1
NFB funding (\$M)	1.8	1.6	1.7	1.6	1.6
<b>Share of national total (%)</b>					
Number of projects	17.1%	19.6%	9.7%	38.2%	7.7%
NFB funding	9.6%	14.5%	8.8%	9.4%	8.0%

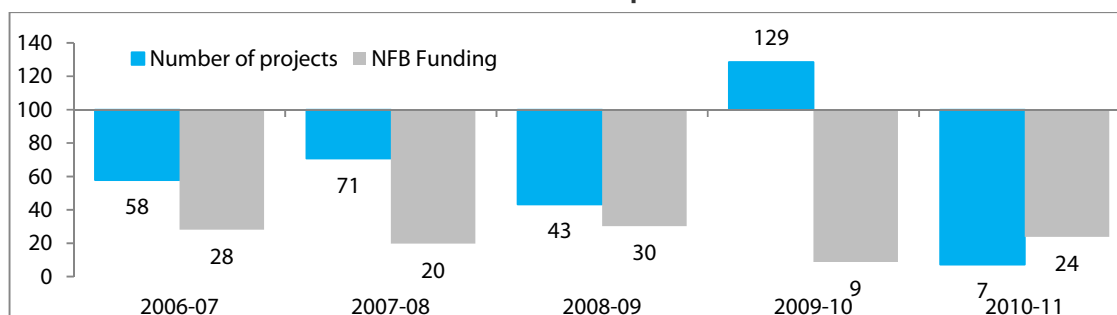
Source: NFB

- On an index basis, the Prairie Provinces' share of NFB coproduction funding was largely under-represented between 2006-07 and 2010-11 (Exhibit 32); although, its share of the number of projects was over-represented in the one year, 2009-10. On an index basis, the Prairie

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

Provinces' share of NFB coproduction funding was consistently very low, ranging from 30% of what it should have been in 2008-09 to a mere 9% of what it should have been in 2009-10.

**Exhibit 32 – Index of Prairie Provinces' share of NFB coproductions**



Source: National Film Board of Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's population.

- In terms of the number of co-production projects funded, the Prairie Provinces' share remained very low with the exception of 2009-10, when they received 29% more than they should have. In all other years, the number of projects ranged from 71% of what they should have been in 2007-08 to a paltry 7% of what they should have been in 2010-11.

## 6.2 Francophone production

- During the five-year period from 2006-07 to 2010-11, the NFB funded 135 Francophone projects totalling \$42.2 million, however, none of these projects were from the Prairie Provinces (Exhibit 33).

**Exhibit 33 – NFB-supported Francophone production (in-house and coproduction)**

	2006-07	2007-08	2008-09	2009-10	2010-11	Five-year total
<b>NFB Funding</b>						
Prairie Provinces (\$M)	0	0	0	0	0	0
Other provinces and territories (\$M)	7.7	10.1	8.0	7.1	9.3	42.2
<b>Number of titles</b>						
Prairie Provinces	0	0	0	0	0	0
Other provinces and territories	32	39	18	22	24	135

Source: NFB

Note: Data includes projects shot in Aboriginal language (in part or in totality) but completed in French.

### 6.3 Aboriginal production

- During the five-year period from 2006-07 to 2010-11, the NFB funded four Aboriginal productions totalling \$836,529; however, none of these were from the Prairie Provinces (Exhibit 34).

**Exhibit 34 – NFB Aboriginal production (in-house and coproduction)**

		2006-07	2007-08	2008-09	2009-10	2010-11	Five-year total
<b>NFB Funding</b>	Prairie Provinces (\$M)	0	0	0	0	0	0
	Other provinces and territories (\$M)	0	0.25	0	0.59	0	0.84
<b>Number of titles</b>	Prairie Provinces	0	0	0	0	0	0
	Other provinces and territories	0	1	0	3	0	4

Source: NFB

Note: Data includes projects shot in Aboriginal language (in part or in totality) but completed in an Aboriginal language.

### 6.4 Summary

- While the NFB constitutes a critical component to Canadian film and television production, the Prairie Provinces are significantly underrepresented in its support. For each year between 2006-07 and 2010-11, the Prairie Provinces have had an extremely low index share of NFB funding for both in-house and co-productions. In terms of the index number of NFB funded projects, the Prairie Provinces were underrepresented in both in-house and co-productions for each year, with the exception of 2009-10.
- In terms of Francophone and Aboriginal production, the Prairie Provinces did not receive any NFB support from the years 2006-07 to 2010-11.



## 7. Aboriginal Peoples Television Network

- Aboriginal Peoples Television Network (APTN), Canada’s national Aboriginal broadcaster, is the primary platform for programming by, for and about Aboriginal Peoples in Canada. In 2010-11, APTN contributed \$12.1 million in broadcaster license fees, attracting an additional \$24.9 million of production financing to a total of \$37.1 million in production budgets (Exhibit 35).
- The data available from APTN combine English-language, Francophone and Aboriginal productions.
- Between 2006-07 and 2010-11, APTN supported an average of 17 projects in the Prairie Provinces per year. APTN broadcaster licence fees for the Prairie Provinces ranged from \$3.5 million in 2006-07 to \$6.2 million in 2010-11. The total production budgets APTN supported in the Prairie Provinces ranged from a low of \$12.1 million in 2008-09 to a high of \$19.1 million in 2009-10. Unlike the stable production budgets for Canada as a whole, the Prairie Provinces experienced a drop in 2008-09 of the number of APTN-commissioned projects, total production budgets and Canadian broadcaster licence fees.

**Exhibit 35 – APTN-commissioned projects, Prairie Provinces and Canada-wide**

	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Number of projects</b>					
Prairie Provinces	19	22	13	19	12
Canada	68	56	54	51	44
<b>Total budgets of APTN projects (\$M)</b>					
Prairie Provinces	17.5	18.2	12.1	19.1	16.7
Canada	35.2	32.7	35.3	42.9	37.1
<b>Canadian broadcaster licence fees (\$M)</b>					
Prairie Provinces	3.5	5.3	3.7	5.9	6.2
Canada	8.5	10.0	10.2	10.6	12.1

Source: APTN

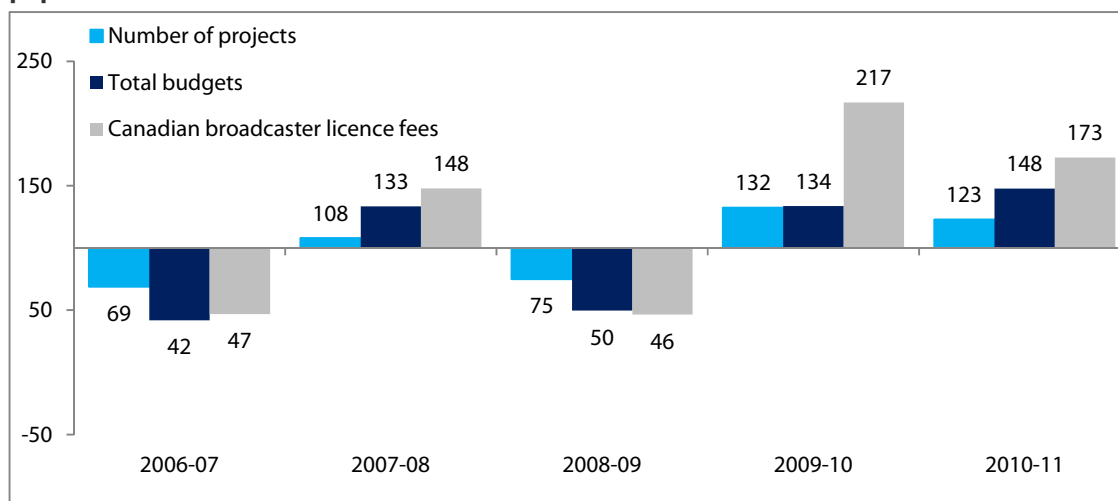
### 7.1 Manitoba

- When adjusted for the province’s share of Canada’s Aboriginal population, Manitoba’s share of APTN production improved significantly in all areas over time, achieving a very high representation in the last two years. Indeed, Manitoba’s share of APTN-commissioned projects was over-represented on both a number and dollar-basis in 2009-10 and 2010-11 (Exhibit 36).
- The index for the number of projects in Manitoba remained the most consistent and relatively neutral, while the index for Canadian broadcaster licence fees experienced the most dramatic

## Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces

fluctuations ranging from a low of 46 in 2008-09 to a high of 217 in 2009-10. For the most part, the index for total budgets remained the most moderate, shifting from a low of 42 in 2006-07 to a high of 148 in 2010.

**Exhibit 36 – Index of Manitoba's share of APTN production based on the national Aboriginal population**



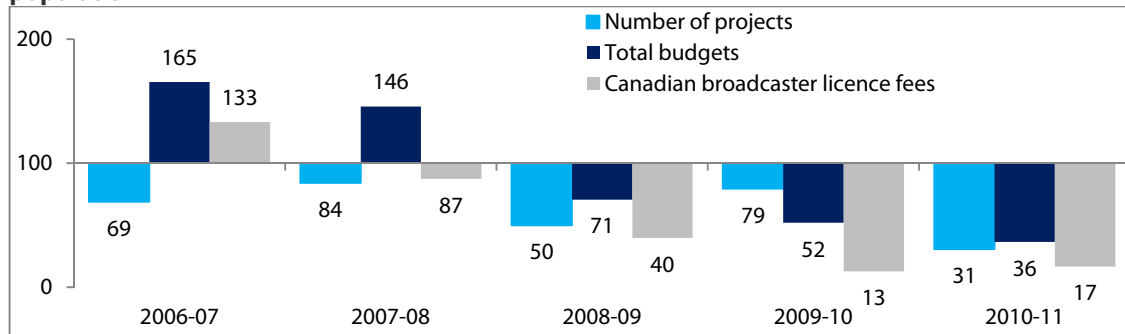
Source: Estimates based on data from APTN and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's Aboriginal population.

## 7.2 Saskatchewan

- After adjusting for the province's share of Canada's Aboriginal population, Saskatchewan's share of APTN production has decreased as a whole for each year between 2006-07 and 2010-11. The number of APTN-supported projects in Saskatchewan has remained consistently below its share of the national Aboriginal population, ranging from an index high of 84 in 2007-08 to a low of 31 in 2010-11 (Exhibit 37). Saskatchewan's share of total budgets by Aboriginal population, however, has decreased consistently each year, from an index high of 165 in 2006-07 to a low of 36 in 2010-11. The province's share of Canadian broadcaster licence fees by Aboriginal population has fallen short from an index high of 87 in 2007-08 to a low of 13 in 2009-10. Overall, Saskatchewan's share of APTN-commissioned production was under-represented between 2008-09 and 2010-11.

**Exhibit 37 – Index of Saskatchewan's share of APTN production based on national Aboriginal population**



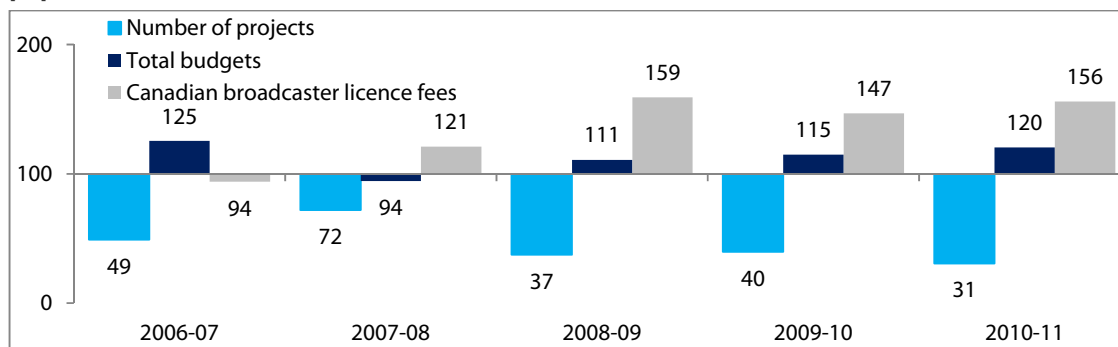
Source: Estimates based on data from APTN and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's Aboriginal population.

### 7.3 Alberta

- When adjusted for the province's share of Canada's Aboriginal population, Alberta's share of APTN production has increased moderately over the past five years. Alberta's share of the number of projects in relation to its Aboriginal population has remained low each year between 2006-07 and 2010-11 (Exhibit 38). From an index high of 72 in 2007-08 to a low of 31 in 2010, Alberta's low share of projects is partially offset by its high share of total budgets and Canadian broadcaster licence fees. Alberta's index share of total budgets has steadily remained positive from 2006-07 to 2010-11, with the exception of a negligible dip to 94 in 2007-08. Alberta's share of Canadian broadcaster licence fees has grown steadily, from a respectable 94 on the index, to a high of 159 in 2008-09 and 156 in 2010-11.
- So, while Alberta's share of APTN project was under-represented in relation to its share of Canada's Aboriginal population, it was over-represented in terms of licence fees and production budgets.

**Exhibit 38 – Index of Alberta's share of APTN production based on the national Aboriginal population**



Source: Estimates based on data from APTN and Statistics Canada

\* An index value of 100 implies that a particular jurisdiction's share is in proportion to its share of Canada's Aboriginal population.

## 7.4 Summary

- The Prairie Provinces receive varying levels of APTN production commissioning in terms of their Aboriginal populations: at times they were over-represented or under-represented. Manitoba experienced two dips in its share of APTN production in the years 2006-07 and 2008-09, along an otherwise strong proportion of programming. Conversely, Saskatchewan and Alberta have both experienced consistently low population-adjusted shares in terms of the number of projects, although Alberta was over-represented in terms of licence fees and budgets in recent years. Saskatchewan, on the other hand, experienced consistent reduction in its share of APTN production activity between 2006-07 and 2010-11. In terms of total budgets, its index dropped from 165 to 36; in terms of licence fees, its index dropped from 133 to 17.

## 8. Summary of Findings

- The Prairie Provinces have played – and continue to play – an important role in Canada’s social, cultural, political and economic development. This important role being played by Prairie Provinces in forging Canada’s identity underlines the need for its storytellers and stories to have pride of place within the Canadian broadcasting system.
- Despite the Prairie Province’s important role in the *Canadian story*, statistics suggest that public broadcasters and organizations continue to short change the region in terms of expenditures (i.e., licence fees) and funding. This shortfall in expenditures and funding typically translates into lower levels of production activity – i.e., number of projects and value of total budgets.
- This study utilized data from CRTC, CAVCO and provincial film funding agencies to assess CBC/Radio-Canada’s expenditures in the Prairie Provinces. It also assessed the regional funding patterns displayed by the CMF and CFFF.

### CBC/Radio-Canada

- As Canada’s national public broadcaster, CBC/Radio-Canada commissions and supports production across the country. That being said, this study’s analysis indicates that its expenditures and commissioning activity were, at times, under-represented in the Prairie Provinces. Data from provincial funding agencies show that **Manitoba** was under-represented in both 2008-09 and 2009-10, in terms of CBC/Radio-Canada expenditures. Longer-term data from CAVCO for all public broadcasters also shows that Manitoba was under-represented in terms of broadcaster expenditures between 2005-06 and 2009-10.
- **Alberta** also appears to have been under-represented in terms of public broadcaster expenditures; although data from Alberta Film indicate that it was the recipient of a disproportionately higher share of CBC/Radio-Canada expenditures in 2008-09.
- **Saskatchewan’s** share of public broadcaster expenditures was typically either in proportion or under-represented, between 2005-06 and 2009-10, according to CAVCO data. That being said, the province’s share of production activity (i.e., number of projects and budgets) fluctuated between periods of over- and under-representation. Saskatchewan’s stronger performance vis-à-vis the other Prairie Provinces may have been due to the role of SCN, which would be captured by CAVCO data.
- Manitoba’s small share of Canada’s overall **Francophone** population (0.7%) meant that it was over-represented in terms of its share of public broadcasters’ expenditures on Francophone

## **Analysis of Regional, Francophone and Aboriginal Production in the Prairie Provinces**

production. However, this type of over-representation would have been expected for a minority-language community seeking to achieve the minimum level of production activity.

### Canada Media Fund

- The CMF's mandate calls for it to support regional production – although the definition of “regional” is vague. The CMF has also introduced funding envelopes specifically designed to support its regional mandate as well as Francophone production outside of Quebec and Aboriginal production.
- That being said, the **Prairie Provinces** were under-represented in terms of their share of CMF funding and production between 2007-08 and 2010-11. And while Manitoba was over-represented in terms of its share of CMF-supported Francophone production between 2007-08 and 2010-11, the Prairie Provinces, as a whole, were significantly under-represented in terms of their share of CMF-supported Aboriginal production during the four-year period.

### Canada Feature Film Fund

- The **Prairie Provinces** were also significantly under-represented in terms of their share of CFFF funding and production activity between 2003-04 and 2010-11. In 2005-06 and 2008-09, in fact, there was no CFFF-supported production in any of the Prairie Provinces. For the other six years, this study's analysis indicated that the Prairie Provinces' share of CFFF funding was typically one-half or less of their share of the population.

### National Film Board of Canada

- The **Prairie Provinces** were largely under-represented in terms of their share of NFB funding and production activity for both in-house and coproductions between 2006-07 and 2010-11. In fact, the Prairie Provinces consistently received less than their share of NFB funding for in-house and coproductions in every year between 2006-07 and 2010-11. The diversity of NFB funded projects in the Prairie Provinces was also very limited. The NFB supported zero Francophone and zero Aboriginal productions in the Prairie Provinces between 2006-07 and 2010-11.

### Aboriginal Peoples Television Network

- As a whole, the **Prairie Provinces** are relatively well represented by APTN funding and production activity. After adjusting for the Prairie Provinces' share of Canada's Aboriginal population, Manitoba and Alberta maintain a strong share of APTN commissioning, supporting a smaller number of larger productions in general. Saskatchewan, however, has seen its share of APTN commissioning decline steadily between 2006-07 and 2010-11.

## References and Data Sources

Canadian Film and Television Production Association, Association des producteurs de films et de télévision du Québec, Department of Canadian Heritage, *Profile 2011: An Economic Report on the Canadian Screen-based Production Industry*, January 2012.

CRTC, *Conventional Television, Statistical and Financial Summaries*, various years.

Canada Media Fund, "Special tabulations of Convergent Stream funding, by province and language, 2007-08 to 2010-11."

## Appendix: Data Tables

**Exhibit 39 – Public broadcaster production in Canada, English- and Francophone**

	2005-06	2006-07	2007-08	2008-09	2009-10
Number of projects	479	452	445	314	353
Total budgets (\$M)	569.0	616.5	691.2	609.3	663.3
Public broadcaster expenditures (\$M)	202.6	231.7	261.5	221.6	215.8

Source: Estimates based on CAVCO data

Note: Includes production commissioned by CBC/Radio-Canada and provincial educational broadcasters

**Exhibit 40 – Public broadcaster production in Canada, Francophone**

	2005-06	2006-07	2007-08	2008-09	2009-10
Number of projects	238	221	209	173	185
Total budgets (\$M)	247.4	275.4	276.1	303.2	291.7
Public broadcaster expenditures (\$M)	106.2	122.2	134.0	130.6	120.4

Source: Estimates based on CAVCO data

Note: Includes production commissioned by CBC/Radio-Canada and provincial educational broadcasters

**Exhibit 41 – Population statistics**

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Population</b>						
Manitoba	1,178,301	1,184,031	1,193,558	1,205,517	1,219,183	1,234,535
Saskatchewan	993,579	992,122	1,000,257	1,013,792	1,029,325	1,044,028
Alberta	3,322,200	3,421,253	3,512,691	3,591,391	3,671,699	3,720,928
Prairie Provinces	5,494,080	5,597,406	5,706,506	5,810,700	5,920,207	5,999,491
Canada	32,245,209	32,576,074	32,929,733	33,315,976	33,729,690	34,126,181
<b>Population shares</b>						
Manitoba	3.7%	3.6%	3.6%	3.6%	3.6%	3.6%
Saskatchewan	3.1%	3.0%	3.0%	3.0%	3.1%	3.1%
Alberta	10.3%	10.5%	10.7%	10.8%	10.9%	10.9%
Prairie Provinces	17.0%	17.2%	17.3%	17.4%	17.6%	17.6%
<b>Francophone population and share</b>						
Manitoba	47,110	47,339	47,720	48,198	48,745	49,358
Canada	6,959,615	6,949,409	7,006,392	7,101,199	7,210,001	7,312,990
Manitoba share	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%
<b>Aboriginal population</b>						
Manitoba	175,395	176,248	177,666	179,446	181,480	183,766
Saskatchewan	141,890	141,682	142,844	144,777	146,995	149,094
Alberta	188,365	193,981	199,166	203,628	208,181	210,972
Prairie Provinces	505,650	511,911	519,675	527,851	536,656	543,833
Canada	1,172,785	1,184,819	1,197,682	1,211,730	1,226,777	1,241,198
<b>Aboriginal population share</b>						
Manitoba	15.0%	14.9%	14.8%	14.8%	14.8%	14.8%
Saskatchewan	12.1%	12.0%	11.9%	11.9%	12.0%	12.0%
Alberta	16.1%	16.4%	16.6%	16.8%	17.0%	17.0%
Prairie Provinces	43.1%	43.2%	43.4%	43.6%	43.7%	43.8%

Source: Statistics Canada

Note: Statistics for 2005-06 from Census 2006. Francophone and Aboriginal population amounts for 2006-07 to 2010-11 were estimated using the overall population growth rates for each province.



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