



The importance of IP in Canada

Over 18,000 people work for more than 50 research-based pharmaceutical companies in Canada. Approximately 10,000 medical researchers are employed as a result of pharmaceutical companies' investment in R&D.

Source: www.canadapharma.org

Film and television production reached an all-time high of \$5.2 billion in 2007/2008. The production studios associated with the CMPDA are key contributors to the foreign location production industry in Canada, in total valued at 1.77 billion dollars annually.

Source : "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>

Film and television production generated 131,600 full-time equivalent jobs (FTEs) in Canada in 2007/08, including 51,700 FTEs directly in film and television production activities. An estimated \$225,000 (U.S.) per day is added to the local economy where film production occur.

Source : "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>

Canada's entertainment software industry comprises approximately 247 establishments located in eight provinces. These establishments include 241 active firms and six subsidiary studios that together employ over 14,000 people.

Source: Canada's entertainment software industry: The opportunities and challenges of a growing industry. March 25, 2009.

QUÉBEC

Information Technology, New Media and Entertainment production

- In 2007, there were approximately 6,000 information technology & telecommunications firms in Québec, employing more than 100,000 people. Of these, more than 4,000 firms were dedicated to subcontracting services and software development. Exports generate over 50% of the software industry revenues.
Source: www.investquebec.com
- Major investment bank Morgan Stanley chose to set up its new specialized software development centre in Montréal. Morgan Stanley will invest more than \$200 million and employ up to 500 people at its Montréal facility
Source: www.investquebec.com
- THQ's (Montréal gaming studio) will be phased in gradually, employing approximately 60 people in the first year and up to 400 people within five years.
Source: www.investquebec.com

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- As the birthplace of pioneering software firms Autodesk Media and Entertainment and Toon Boon and a creation center for leading game publishers such as Ubisoft, A2M, Electronic Arts, Eidos, Activision (Beenox), Gameloft and Airborne Mobile, Québec has become a hub of the digital entertainment industry in North America
Source: www.investquebec.com
- In Montreal, the 43 entertainment software firms have an expected annual growth (3 years) of 26% and employ 4442 people.
Source: Canada's entertainment software industry: The opportunities and challenges of a growing industry. March 25, 2009.
- Québec city is the largest secondary cluster of entertainment software firms with five companies employing over 600 people.
Source: Canada's entertainment software industry: The opportunities and challenges of a growing industry. March 25, 2009.

Film and Television

- Worth over \$1.2 billion to the province's economy, generating 39,100 jobs.
Source: "09 Profile" Economic Report of the Film and Television Industry.
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- Québec is one of Canada's three largest production centers, accounting for 23% of all film and television production in the country.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- Québec maintained its position as the leading province for Canadian theatrical production in 2007/08, with Quebec-based producers accounting for 43% of the total volume of Canadian theatrical production.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- According to the Government of Québec, foreign film productions shot on location in the province creates or supports roughly 4500 jobs and generates spin-offs of nearly \$200 million, on average, annually.
Source: Government of Québec Press release, "Québec is positioning itself as a film industry leader", June 12 2009.

Life Sciences

- Montréal ranks 8th in North America for pharmaceutical jobs, with a pool of 32,000 stable, experienced and skilled workers in the biopharmaceutical industry and over 13,000 researchers in the public biomedical researchcenters. Source: www.investquebec.com
- The ten largest pharmaceutical companies in the world have established operations in Québec: They are: AstraZeneca, Bristol-Myers Squibb, GSK,

Johnson&Johnson, Merck Frosst (Merck), Novartis, Pfizer, Roche Diagnostics, Sanofi-Aventis and Wyeth.

Source: www.investquebec.com

- Nearly half of the Canadian life sciences industries are concentrated in the Montréal region, which also accounts for most of the basic and clinical research activities conducted in Canada - this is more than 400 companies.
Source: www.investquebec.com

- Close to 150 products are currently in development in Québec.
Source: www.investquebec.com

ONTARIO

Over the past twenty-five years, the creativity-oriented occupations have increased from 26 percent of the province's workforce to 30 percent, while routine-oriented jobs have declined from 74 to 70 percent.

Source: Ontario in the creative age: Martin Prosperity Institute

<http://martinprosperity.org/projects/project/ontario-in-the-creative-age>

Information Technology, New Media and Entertainment production

- Over 249,000 people are working directly in Ontario IT industry
Source: www.investinontario.com
- In the Toronto (GTA) there are over 3,300 high-tech companies (dominance to digital media and Internet) generating revenues over \$32.5 billion and employing 148,000 people.
Source: www.investinontario.com
- In the Ottawa Region, there are over 1,800 high-tech companies (particular strength in telecommunication equipment and networking wireless technology) generating revenues of 17.5 billion annually and employing 82,000 people.
Source: www.investinontario.com
- In the Kitchener-Waterloo Region, there are 400 high-tech companies (strength in software, microelectronics and telecommunications) generating revenues of \$4.6 billion annually and employing 15,000 people
Source: www.investinontario.com
- The 65 entertainment software firms of the Greater Toronto Area have an expected annual growth (3 years) of 25% and employ 1,293 people.
Source: Canada's entertainment software industry: The opportunities and challenges of a growing industry. March 25, 2009.

Film and Television

- Worth \$1.9 billion to the province's economy, generating 41,600 jobs.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- Film and television production companies spent \$610.6 million filming on-location in Toronto in 2008 and \$791.4 million in 2007, according to the Toronto Film and Television Office.
Source: Toronto Film and Television Office, A snapshot: film, television, commercial and music video productions in Toronto;
<http://www.toronto.ca/tfto/pdf/stats.pdf>
- Film and television production in Ontario was valued at \$671.2 million in 2008 and in recent past years has topped \$1 billion, according to the Ontario Media Development Corporation.
Source: Ontario Media Development Corporation, "Industry Profile Film", March 31 2009.

Life Sciences

- Ontario's life sciences industry employs more than 43,000 people at more than 815 companies which generate more than \$14 billion annually
Source: www.investinontario.com
- The pharmaceutical industry employs over 16,000 people, and generates revenues of \$7.5 billion annually. It includes global giants such as AstraZeneca, Bayer, Eli Lilly, GlaxoSmithKline and Pfizer.
Source: www.investinontario.com
- The medical and assistive devices industry employs 22,000 people and generates revenues of \$4 billion annually. It includes over 675 companies such as GE Medical Systems and Johnson & Johnson Medical Products.
Source: www.investinontario.com
- The biotech industry employs over 5,000 people and generates revenues of \$2.8 billion annually. More than 140 companies such as Amgen, Genzyme and sanofi pasteur operate in Ontario
Source: www.investinontario.com

BRITISH COLUMBIA

Information Technology New Media and Entertainment production

- There are approximately 6,000 companies active in the sector across the province generating revenues of \$9 billions and employing about 46 000 people
Source: www.investbc.com

- Microsoft software development centre in Richmond employs 200 people and is one of the only 5 centres of this kind in the world.
Source: www.investbc.com
- British Columbia's New Media sector is among the world's top performing cluster. It is comprised of over 1000 companies employing approximately 15 000 people, with revenues over \$2 billion a year.
Source: www.investbc.com
- Vancouver has the largest and most dynamic cluster of entertainment software firms in Canada; 61 firms with an expected annual (3 years) growth of 23% employ over 5800 people.
Source: Source: Canada's entertainment software industry: The opportunities and challenges of a growing industry. March 25, 2009.

Film and Television

- Worth \$1.6 billion to the province's economy, generating 39,500 jobs.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- British Columbia has the highest levels of foreign location and service production with almost \$1.2 billion in foreign location production taking place in that province in 2007/08. This represents almost 2/3 of all production which took place in that province.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- According to the British Columbia Government, B.C. has become the third-largest film and television production centre in North America. The number of production projects has risen up almost 30 per cent to 260 from 2002.
Source: Government of British Columbia, Ministry of Tourism, Culture and the Arts News Release, "Motion Picture Production Up to \$250 Millions

Life Sciences

- The BC cluster is number three in Canada and number seven in North America with over 100 companies and 2,600 employees.
source: "Life Science Overview" Life Sciences British Columbia 2007 - including pharmaceutical products and drug-device combinations
- BC biotechnology companies attracted \$700 million in capital in 2006 and \$845 million of partnership deals with major multinational pharmaceutical firms.
source: "Life Science Overview" Life Sciences British Columbia 2007 - including pharmaceutical products and drug-device combinations

- Fourth high tech sector in terms of revenue generation and employment (ICT, New Media, Wireless, Biopharmaceutical, Fuel cells).
source: "An Integrated Strategy for British Columbia's Technology Clusters", PriceWaterhouseCoopers 2004
- Biotech company revenues approached \$1 billion in 2006
source: "Life Science Overview" Life Sciences British Columbia 2007 - including pharmaceutical products and drug-device combinations

ALBERTA

Entertainment software industry

- Five software entertainment companies make their home in Edmonton. The very successful Bioware, now owned by EA, is internationally recognized from its role playing in games.
Source: Source: Source: Canada's entertainment software industry: The opportunities and challenges of a growing industry. March 25, 2009.
- The Calgary cluster comprises seven companies with an employment estimated close to 200 people.
Source: Source: Canada's entertainment software industry: The opportunities and challenges of a growing industry. March 25, 2009.

Film and television

- Dollars spent in Alberta as a result of film and television productions supported by the Film Development Program in 2006-07 = \$124 million.
Source: <http://culture.alberta.ca/newsroom/facts.aspx>
- In 2007-08, the industry generated approximately \$102 million of economic activity in the province.
Source: <http://culture.alberta.ca/newsroom/facts.aspx>
- 85% of Alberta's film industry is based in the Calgary region.
Source: <http://culture.alberta.ca/newsroom/facts.aspx>
- Alberta saw its volume of production jump by 26%, or \$18 million, to reach an all-time high of \$87 million in 2007-08.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- Total direct and spin-off full-time equivalent jobs (FTEs) generated by film and television production in 2007-08: 4,500

Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>

Life sciences

- Over 130 companies located mainly in the Edmonton (57%) and Calgary (38%) regions directly employing 4500 people.
Source: "Bio-industry In Alberta – State of the Industry 2007", BioAlberta and KPMG. See: [http://www.bioalberta.com/upload/BioAlberta_StatusIndustry_FINAL-referenceOnly\(1\).pdf](http://www.bioalberta.com/upload/BioAlberta_StatusIndustry_FINAL-referenceOnly(1).pdf)
- Alberta's bio-industry had revenues estimated to be \$814 million in 2006.
Source: "The biopharmaceutical sector in Alberta" Rx&D and Secor consulting, March 2008.
- Bio-industry firms spent \$135 million on R&D in Alberta.
Source: "The biopharmaceutical sector in Alberta" Rx&D and Secor consulting, March 2008.
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OTHER PROVINCES

MANITOBA

- An estimated 4,200 people are employed in the life sciences sector.
Source: www.gov.mb.ca/ctt/profiles/index.html
- The ICT sector employs over 15,000 Manitobans and generates revenues of over \$600 million. Manitoba's ICT sector exports more than \$227 million worth of goods throughout the world.
Source: www.gov.mb.ca/ctt/profiles/index.html
- Manitoba has over 1,500 companies operating in the ICT sector, with approximately 80% of these firms located in Winnipeg (riding of Joy Smith)
Source: www.gov.mb.ca/ctt/profiles/index.html
- Film & Sound — The total value of productions undertaken in Manitoba exceeded \$125 million in 2005-2006 and employed an estimated 800 persons.
Source: www.gov.mb.ca/ctt/profiles/index.html
- Digital Media — There are an estimated 230 digital media companies in Manitoba. In addition to independent private companies, numerous firms in the traditional media areas (advertising, public relations, radio and television) have developed in-house digital media services by adopting new technologies for the benefit of their clients and/or themselves
Source: www.gov.mb.ca/ctt/profiles/index.html

ATLANTIC CANADA

- The volume of the production in the Atlantic Provinces reached \$120 million in 2007-08.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>
- Total direct and spin-off full-time equivalent jobs (FTEs) generated by film and television production in 2007-08: 3,000. Almost two thirds of which in Nova-Scotia only.
Source: "09 Profile" Economic Report of the Film and Television Industry
<http://www.cftpa.ca/newsroom/pdf/profile/profile2009-en.pdf>