

PRICEWATERHOUSECOOPERS 

Canadian Interactive Industry Profile 2006

Canadian Interactive Alliance

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CANADIAN INTERACTIVE ALLIANCE / L'ALLIANCE INTERACTIVE CANADIENNE (CIAIC)

Constituted in June 2006 the Canadian Interactive Alliance / L'alliance interactive canadienne (CIAIC) is the national advocate for the Interactive Digital Media industry. The CIAIC is comprised of leading associations representing the Interactive Media industry across Canada. CIAIC members include:

Alliance numériQC

www.numeriqc.ca

Canadian Film and Television Production Association (CFTPA)

www.cftpa.ca

Digital Media Association of Alberta (DMAA)

www.dmaa.ca

Innovation and Technology Association of PEI (ITAP)

www.itap.ca

Manitoba Interactive Digital Media Association (MIDMA)

www.midma.com

New Media BC

www.newmediabc.com

Interactive Ontario Industry Association (io)

www.interactiveontario.com

Saskatchewan Interactive Media Association

www.snmda.sk.ca

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ABOUT THE CANADIAN INTERACTIVE INDUSTRY PROFILE

The following study was created to define, classify and profile the Interactive Media Industry on a national level.

This project was made possible with the support of the Department of Canadian Heritage through Telefilm Canada and Canadian Culture Online, the Ontario Media Development Corporation, Bell Broadcast & New Media Fund, the Entertainment Software Association of Canada and Canadian Film & Television Production Association.

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Interactive Ontario Industry Association (io) is a not-for-profit industry trade organization committed to the growth of the Ontario interactive digital content industry. To this end io is an industry advocate within Ontario and nationally as a founding member of the Canadian Interactive Alliance /Alliance interactive canadienne (CIAIC). www.interactiveontario.com

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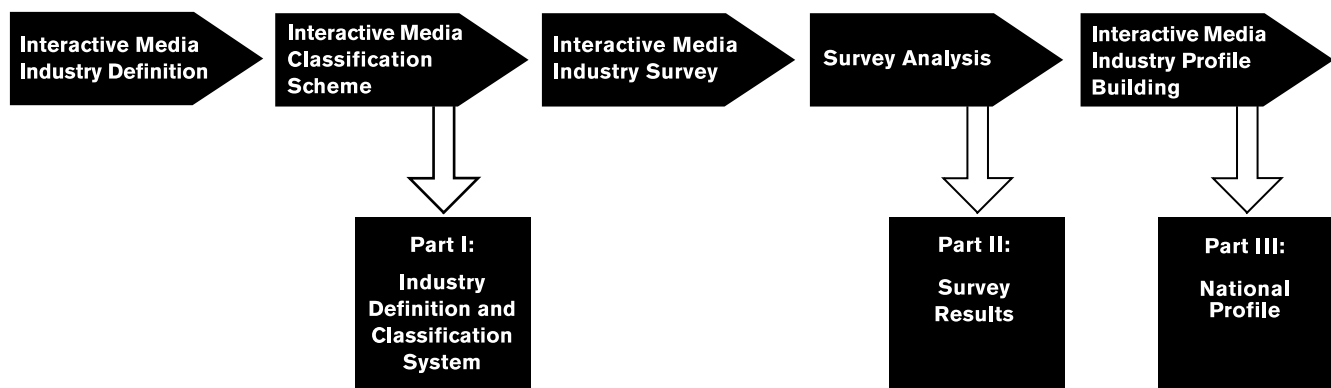
EXECUTIVE SUMMARY

Study Introduction and Purpose

The Canadian Interactive Alliance / Alliance Interactive Canadienne (CIAIC) is a national umbrella organization formed in 2005 by organizations representing the Interactive Media Industry across Canada. The CIAIC has identified the need to develop and apply a consistent definition and classification of Canada's Interactive Industry in order to gain a comprehensive, unified understanding of the industry.

With the input of industry representatives, PricewaterhouseCoopers (PwC) has developed a working definition and classification scheme for the Interactive Media Industry. The definition and classification scheme were used to prepare a survey, designed and conducted by FAD Research, of industry participants. The results of the survey were analyzed by PwC to develop a profile of the Interactive Media Industry in Canada.

The following diagram illustrates, at a high level, the steps of this project and how they flow into each of the three parts of this report.



This study is the first attempt at defining, classifying and profiling the Interactive Media Industry on a national level. It is hoped that the results of this study will serve as a basis for ongoing analysis of the Interactive Media Industry that will lead to a more comprehensive understanding of its size and structure. It is also hoped that, by adopting a consistent definition and classification scheme, progress will be made towards independent recognition of the Interactive Media Industry by statistical agencies. This would, in turn, lead to more comprehensive and structured tracking of the industry.

As described above, the purpose of this study is threefold:

1. To propose and utilize a consistent definition of and classification scheme for the Interactive Media Industry in Canada.
2. To analyze Canada's Interactive Media Industry based on the proposed definition and classification scheme by surveying industry participants.
3. To develop a profile of Canada's Interactive Media Industry on a national level, based on the proposed definition and classification scheme combined with the survey results.

Summary of Findings

Interactive Media Definition

Based on a review of current working definitions of interactive media together with input from the Canadian Interactive Industry Profile (CIIP) project steering committee, PwC has developed the following definition for Interactive Media:

“Interactive Media is digital media which enables users to interact with other users or with the media itself for the purposes of entertainment, information, and education. Interactive media includes two sub-sectors, the entities creating the media content (creators) and the entities that are focused in allowing the media to be manipulated to facilitate distribution to the user (enablers).”

Under this definition, interactive media does not include the entities that allow the media to be delivered to the users.

Interactive Media Classification

In collaboration with the CIIP project steering committee PwC has developed a classification system that divides the Interactive Media Industry into two groups: Content Creators and Enablers. Under the classification system, there are six categories of content creators and five categories of enablers. The content creator categories are: Interactive Entertainment; E-learning and Education; Information and Reference; Social, Culture and Arts; Animation, and Other. The enabler categories are: Software Development; Digital Compression Technologies; Internet Applications; Visual Effects; and Interactive Television.

Highlights of Survey Results

The survey was designed and conducted by FAD Research in the Spring of 2006. The purpose of the survey was to develop a profile of Interactive Media Industry firms by category. The information requested from participants was to reflect the data currently available at the time of the survey, most likely, but not necessarily the company's fiscal 2005.

Survey Highlights – Firms with Revenues under \$10 million

Excluding firms with annual revenues greater than \$10 million, the overall average revenue from interactive media¹ for respondents is \$592,103. Examined by category, the overall average revenue from interactive media for enablers is \$697,661, while the overall average revenue from interactive media for content creators is \$566,024.

Respondents were asked to provide a breakdown of their interactive media revenue from fee-for-service activities as compared to their interactive media revenue from development of intellectual property. Overall, 57.6% of respondents' interactive media revenue is from fee-for-service activities. Enablers derive 51.5% of their interactive media revenues from fee-for-service activities. Content creators derive 59.5% of their interactive media revenues from fee-for-service activities.

¹ Note that average revenue from Interactive Media is the reported revenue that firms earn from their activities in Interactive Media, rather than their revenues for all activities, which is their average gross revenue.

The overall average employment in interactive media activities is 10.3 staff, of which 6.1 are full time, 1.2 are part time, and 3.0 are sub-contractors. There is little difference between average interactive media employment for content creators and enablers. There is, however, substantial variation in average employment within the content creator task categories; the overall average interactive media employment (for all types of employment) ranges from 5.8 staff for firms in the social, culture and arts task category up to 19.5 staff at firms in the interactive entertainment category. Among the enabler task categories, there is much less variation in the average interactive media employment; the range is from 8.1 for other enablers to 10.6 for software development firms.

Overall, more than half of respondents are engaged in export activities, with 58.0% indicating that they export. For enablers overall, 66.7% of firms export, while 55.9% of content creators overall export. While the percentage of firms that export is higher amongst enablers, the average percentage of business that is for export is lower than for content creators. The average percentage of business that is for export among enablers is 34.0%, while this value is 48.5% among content creators.

Survey Highlights – Firms with Revenues over \$10 million

The responses from very large firms with revenues over \$10 million were analyzed separately from other respondents. For these respondents, the average revenue from interactive media is \$13,370,000. At 70.5%, the very large firms derive a greater share of their revenues from interactive media from the development of intellectual property than the smaller firms. The overall average interactive media employment is 135.8 staff, of which 128.8 are full time, 1.6 are part time, and 5.4 are sub-contractors. All of the respondents among the very large firms are engaged in exporting, and 98.0% is the average percentage of their business that is for export.

Size of the Interactive Media Industry in Canada

There are an estimated 3,200 firms engaged in interactive media across Canada that generate total gross revenue of \$7.07 billion to \$7.43 billion. The overall estimated total revenue from interactive media for all firms is between \$4.93 billion and \$5.01 billion. Including full time staff, part time staff and subcontractors, there are estimated to be between 50,300 and 52,100 people working in interactive media across Canada.

Report Structure

There are three main sections of this report. The first section (Part I) describes a proposed definition and classification system for the Interactive Media Industry. The second section (Part II) of the report contains an analysis of a survey of the Interactive Media Industry that was designed and executed by FAD Research of Toronto. (The survey was based on the definition and classification scheme described in Part I.) Our analysis of the survey data constructs profiles of the Interactive Media Industry in the following areas: revenue, business performance, employment, project type, end users, exports, and funding sources. The third section (Part III) of this report describes the Interactive Media Industry in Canada based on the survey results, information provided by provincial associations representing the industry, and by independent research conducted by PricewaterhouseCoopers.

SCOPE OF STUDY

Introduction

The Canadian Interactive Media Industry

Over the past several years, the Interactive Media Industry has emerged and grown to become an integral part of Canada's economy, as well as part of the day-to-day life of many Canadians. Companies and organizations in the Interactive Media Industry are increasingly involved in providing entertainment, education, and information in non-traditional ways.

In general terms, the Interactive Media Industry encompasses companies and organizations that are involved in the creation of interactive media or in the manipulation of interactive media to make it usable for consumers. Interactive media is digital media used for information, education, or entertainment that allows interaction between the user and other users or the medium itself.

While a general description of the Interactive Media Industry is widely understood, a precise classification scheme for the industry has proven elusive. This is partly due to the broad range of terms used to describe the industry (which include new media, interactive media, digital media, and interactive digital media), partly due to the different views of the organizations proposing classification systems, and partly due to the dynamic nature of the industry itself.

Formed in 2005, the Canadian Interactive Alliance / Alliance Interactive Canadienne (CIAIC) represents the Interactive Media Industry in Canada at a national level. Its members include eight associations across Canada that represent the Interactive Media Industry:

- The New Media Business Alliance
- Digital Media Association of Alberta
- Alliance numériQC
- Canadian Film and Television Production Association
- Innovation and Technology Association of PEI
- Manitoba Interactive Digital Media Association
- New Media British Columbia
- Saskatchewan New Media Developers Association.

The CIAIC has identified a need to develop a consistent definition and classification of the Interactive Media Industry to be applied across Canada. This unified definition and classification will enable this emerging and quickly-changing industry to be analyzed consistently over time. This will allow for greater recognition of the industry as a common definition is applied over jurisdictions. It will also allow for a deeper understanding of the industry through the use of common indicators that can be tracked over time. It is also hoped that, with a clear definition and adopted classification scheme, progress can be made towards independent recognition of the Interactive Media Industry by statistical agencies.

Relationship of the Industry to the Information and Technology and Culture Sectors

The Interactive Media Industry is often referenced as being part of two industry sectors: the Information and Communication Technology (ICT) sector; and, the culture sector. The Interactive Media Industry is viewed as being part of the ICT sector through its reliance on technology for the creation, support, and distribution of its products and services. The Interactive Media Industry, however, has characteristics that distinguish its members from the larger ICT sector. In particular, the Interactive Media Industry involves digital media, whereas the ICT sector also includes more traditional forms of media. As well, the Interactive Media Industry involves content that is used for information, education, and entertainment, whereas the ICT sector also includes other types of activities (such as manufacturing and services industries).

The Interactive Media Industry is also viewed as being part of the culture sector, largely due to the role of creative activities in the industry. Again though, the Interactive Media Industry has characteristics that distinguish its members from the larger culture sector. In particular, the Interactive Media Industry is focused on digital media, whereas culture includes goods and services resulting from any creative artistic activity.

Purpose of this study

The purpose of this study is threefold:

1. To propose and utilize a consistent definition of and classification scheme for the Interactive Media Industry in Canada.
2. To analyze Canada's Interactive Media Industry based on the proposed definition and classification scheme by surveying industry participants.
3. To develop a profile of Canada's Interactive Media Industry on a national level, based on the proposed definition and classification scheme combined with the survey results.

There are three main sections of this report. The first section (Part I) proposes a definition and classification system for the Interactive Media Industry that captures the scope of the industry without overreaching so as to include all activities that may touch on the Interactive Media Industry. The second section (Part II) of the report is an analysis of survey data. The survey was designed and executed by FAD Research of Toronto, and was based on the definition and classification scheme described in Part I. The results of the survey are used to build a profile of members of the Interactive Media Industry. Several categories of information from the survey are used to build profiles of the Interactive Media Industry in areas such as revenue, employment, project type, and funding sources. The third section of this report (Part III) describes the Interactive Media Industry in Canada based on the survey results, information provided by provincial associations representing the industry and from information collected independently by PricewaterhouseCoopers.

PART I: INDUSTRY DEFINITION AND CLASSIFICATION SYSTEM

BACKGROUND

Need for a Classification System

At present, the activities of the Interactive Media Industry are included in existing industry classifications within the North American Industrial Classification System (NAICS). However, under that approach, the activities of the industry are scattered across a variety of different industry categories. As a result, it is extremely difficult to assess the health, direction or growth of the Interactive Media Industry in a timely or consistent manner. It is therefore important to develop a classification system for the industry that can be used to capture the extent of its activities and to measure its economic performance.

Need for a National Profile

Application of a consistent classification system for the Interactive Media Industry in Canada will enable the industry to be described consistently on a national scale. While several provincial associations representing the industry have profiled their industry members on a regional scale, differences in approach make it difficult to compile the regional information in order to prepare a national profile. This study applies a uniform definition for the industry across Canada, which ensures that similar types of organizations are included in the profile.

The national profile is an important first step in understanding Canada's Interactive Media Industry. The profile will facilitate consistent comparison of the industry, so that the growth and development of the industry can be tracked over time. Industry participants can use the profile information to understand how they fit in with the landscape of the industry overall, including their size, activities, and structure relative to their peers.

APPROACH

To develop a classification system for the Interactive Media Industry, we have attempted to ensure that it is based on an understanding of the industry, previous work done in the interactive media field, and recognition of previous classification strengths and weaknesses. We have reviewed numerous private sector and government reports relating to the Interactive Media Industry and assessed the strengths and weaknesses of the classification systems used in each of them. (Appendix B contains a summary of those reports, noting their focus, approach, and our conclusions regarding their classifications of the Interactive Media Industry.)

Our suggested classification system is a hybrid of these earlier efforts that attempts to balance the need to capture the full extent of the industry's activities with the need to limit the scope of the industry to its core activities.

Interactive Media Definition

We suggest the following definition for Interactive Media:

"Interactive Media is digital media which enables users to interact with other users or with the media itself for the purposes of entertainment, information, and education. Interactive media includes two sub-sectors, the entities creating the media content (creators) and the entities that are focused in allowing the media to be manipulated to facilitate distribution to the user (enablers)."

Based on our suggested definition, interactive media does not include the entities that allow the media to be delivered to the users.

Interactive Media Industry Classification System

We suggest using a classification system that divides the industry into two groups: content creators, and enablers. Content creators include companies and organizations that create the interactive media content. Enablers include companies and organizations that facilitate the distribution of interactive media to users.

We suggest using six categories of content creators and five categories of enablers. The following is a list of the suggested categories, together with examples of the types of activities in each category.

Table 1. Interactive Media Industry

Content Creators
C1 – Interactive Entertainment
Game Development (Idea Creation/Storyboarding/Design, Graphics Creation, Audio Creation)
Interactive Narrative
C2 - E-Learning and Education
Corporate Training - Design and Development
Secondary (K-12) Education – Design and Development
Post-Secondary Education - Design and Development
Simulation Training – Design and Development
C3 – Information and Reference
Web Content Creation
Advertising and Promotional Content Creation
Mobile Content Creation
C4 – Social, Culture and Arts
Social Networking
Interactive Original Art Design and Development
C5 – Animation
Idea Creation/Storyboarding
Graphics Creation (designing, rendering, etc)
Audio Creation (voice, sound effects, etc)
C6 - Other
Digital Content Publishing
Enablers
E1 - Software Development
Software Design and Development
Software Publishing
E2 - Digital Compression Technologies
Video Compression Technologies
Audio Compression Technologies

E3 - Internet Applications
Graphics Rendering Programs
Java-type Applets
E4 - Visual Effects
Visual Effects Design and Development
E5 - Interactive Television
Production Services
Application Platforms

Using the suggested definition and classification system, interactive media is defined as digital media where there is a two-way flow of information between the user and the medium (this is in contrast to traditional media, where the user is a passive participant). Each form of interactive media may require several types of enabling activities and each content creator may use any of the enablers. Using the suggested classification system, companies and organizations are classified into one of the sub-industries of content creation or enablers according to their primary activity.

The following diagram (Figure 1) illustrates the classification system schematically, and shows the position of the Interactive Media Industry relative to related industries. The diagram is designed to represent all media on the periphery with the definition of interactive media becoming more restrictive toward the center of the diagram. For example, all media is either digital or non-digital but only digital media is inside the digital layer.

The center of the diagram contains the main visual representation of our suggested definition of the Interactive Media Industry: the content creators and the enablers.

Figure 1: Recommended Definition of Interactive Media Industry

Content Creators: Entities which make the interactive media content		
C1 – Interactive Entertainment	C2 - E-learning and Education	C3 – Information and Reference
C4 – Social, Culture and Arts	C5 - Animation	C6 - Other
Enablers: Entities that facilitate the distribution of interactive media to end users		
E1 – Software Development	E2 – Digital Compression Technologies	E3 – Internet Applications
E4 – Visual Effects	E5 – Interactive Television	

Activities Not Included in the Suggested Definition and Classification System

Under the suggested definition and classification system, there are certain groups that are not included in the Interactive Media Industry. The following is a brief discussion of the reasons for recommending the exclusion of these groups.

Non-Digital Media: Of the interactive media reports that we reviewed, all defined it as a digital type of media. We suggest the exclusion of non-digital media due to the fact that this type of media is classified under more traditional types of media.

Non-Interactive Media: An overriding theme of the majority of the interactive media reports is that interactive media involves interaction between the user and the content. Interactive media can be manipulated by the user and the traditional “pushdown” media is not an interactive form of media. Consequently, we suggest the exclusion of non-interactive media.

Deliverers (e.g. ISPs etc): In some of the previous reports deliverers were included in the definition of the Interactive Media Industry. However, other reports argued convincingly against their inclusion on the basis that deliverers do not add significant value to the intellectual property portion of the Interactive Media Industry. Deliverers, it is argued, are merely the “highways” that the information is being broadcast on and as such, could be transporting non-interactive media as well. Although an essential service for the Interactive Media Industry, we suggest not including deliverers in the Interactive Media Industry definition.

NAICS CODES CLASSIFICATION

Currently, companies and organizations in the Interactive Media Industry are classified into a number of different North American Industry Classification System (NAICS) code categories. The following table shows how our suggested categories align with existing NAICS codes. Note that the NAICS codes include companies and organizations that would not be considered part of the Interactive Media Industry. Appendix C contains a fuller description of these NAICS codes.

Table 2. NAICS Codes of Interactive Media Industry

	Current NAICS Code Categories
Content Creators	
C1 - Interactive Entertainment	
	5112 - Software Publishers
	5121 - Motion Picture & Video Industries
	5122 - Sound Recording Industries
	5415 - Computer System Design and Related Services
	5414 - Specialized Design Services
C2 - E-Learning and Education	
	5112 - Software Publishers
	5122 - Sound Recording Industries
	5161 - Internet Publishing and Broadcasting
	5415 - Computer System Design and Related Services
	6117 - Educational Support Services
C3 - Information and Reference	

	5161 - Internet Publishing and Broadcasting
	5414 - Specialized Design Services
	5415 - Computer System Design and Related Services
	5418 - Advertising and Related Services
	7115 - Independent Artists, Writers and Performers
C4 - Social, Culture and Arts	
	5161 - Internet Publishing and Broadcasting
	7115 - Independent Artists, Writers and Performers
C5 - Animation	
	5414 - Specialized Design Services
	5415 - Computer System Design and Related Services
	7115 - Independent Artists, Writers and Performers
C6 - Other	
	5161 - Internet Publishing and Broadcasting
Enablers	
E1 - Software Development	
	5112 – Software Publishers
E2 - Digital Compression Technologies	
	5112 - Software Publishers
	5415 - Computer System Design and Related Services
E3 - Internet Applications	
	5112 - Software Publishers
	5415 - Computer System Design and Related Services
E4 - Visual Effects	
	5414 - Specialized Design Services
	5415 - Computer System Design and Related Services
	7115 - Independent Artists, Writers and Performers
E5 – Interactive Television	
	5414 - Specialized Design Services
	5415 - Computer System Design and Related Services

PART II: SURVEY RESULTS

INTRODUCTION

The Interactive Media Industry in Canada is diverse, both geographically and operationally. As compared to more traditional industries, the activities and participants in the Interactive Media Industry can change rapidly. These factors make it important, although challenging, to capture the activities of the Interactive Media Industry in a consistent and cohesive framework.

As part of an initiative to define and describe the Interactive Media Industry, the Canadian Interactive Alliance / Alliance Interactive Canadienne (CIAIC) commissioned FAD Research to undertake a survey of Canadian Interactive Media Industry companies. The study was administered during Spring 2006, using an online survey designed and administered by FAD Research. The information requested from participants was to reflect the data currently available at the time of the survey, most likely, but not necessarily the company's fiscal 2005.

This survey was conducted on a nation-wide basis, which saw organizations active in the Interactive Media Industry being invited to participate. This survey was the first attempt to capture the magnitude of the Interactive Media Industry across Canada using the definition and classification system described in Part I of this report. The survey included the following topics: revenue, business performance, employment, project type, end users, exports, and funding and financing.

This section of the report describes the findings of the survey. It is important to note that the results presented are based on the responses to the survey and are not intended to present a complete picture of the universe of the Interactive Media Industry in Canada. It is hoped, however, that the survey results will profile the size and activities of firms that comprise the Interactive Media Industry in Canada.

While nearly all of the respondents to the survey were small, medium, or large in size, there were a small number of very large firms that responded to the survey. In the analysis, we have separated these respondents from the others so that their results do not dominate the overall results. In the tables and discussion that follows, we have referred to these respondents as "Very Large Firms". These firms are further divided into two groups; "Very Large Firms" and "Exceptionally Large Firms".

REVENUE OF INTERACTIVE MEDIA ORGANIZATIONS

Average Gross Revenue

Average gross revenue, which is the reported average revenue of firms participating in interactive media activities, is indicative of the size of firms that are involved in the Interactive Media Industry. As illustrated in the following table, the overall average gross revenue of respondents was very similar for content creators and enablers; content creators have reported overall average gross revenue of \$949,676 and enablers have reported overall average gross revenue of \$933,929.

Table 3. Average Gross Revenue by Primary Activity Group and Firm Size

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	\$80,914	\$546,875	\$4,396,552	\$948,676
Enabler	\$95,455	\$458,333	\$3,000,000	\$933,929

Notes: 1) Small Firms: 93 content creators and 22 enablers have gross revenue less than \$250,000.

- 2) Medium: 48 content creators and 9 enablers have gross revenue between \$250,000 and \$1 million.
 3) Large: 29 content creators and 11 enablers have gross revenue between \$1 million and \$10 million.
 4) There are 8 very large firms (gross revenue over \$10 million) that are not included in this analysis.

The overall average gross revenue reported by respondents, which includes both content creators and enablers, is \$945,755. Table 4 illustrates that there is a greater range of average gross revenue among the content creator categories than among the enabler categories.

Note that the "Other Enablers" is a combined grouping of the primary task categories of digital compression technologies, visual effects, and interactive television. There were a low number of responses to the survey of firms that fall into these primary task categories. Consequently, for analysis and reporting purposes, respondents in these three primary task categories are considered as an "Other Enablers" category.

Table 4. Average Gross Revenue by Primary Task Category

Primary Activity Group	Primary Task Category	Average Gross Revenue
Content Creator	Interactive Entertainment	\$1,355,405
	E-learning and Education	\$467,969
	Information and Reference	\$634,434
	Social, Culture and Arts	\$392,857
	Animation	\$1,710,227
	Other	\$1,616,667
Content Creator Overall		\$948,676
Enabler	Software Development	\$958,333
	Internet Application	\$971,053
	Other Enablers	\$705,000
Enabler Overall		\$933,929
Overall Average Gross Revenue		\$945,755

Note: Excludes firms with gross revenue over \$10 million.

As shown in the following table, the average gross revenue for very large firms and exceptionally large firms is substantial; very large firms have a reported average gross revenue of about \$16.6 million and the reported average gross revenue for the exceptionally large firms is \$500 million.

Table 5. Average Gross Revenue for Very Large Firms

	Average Gross Revenue
Very Large Firms	\$16,600,000
Exceptionally Large Firms	\$500,000,000

- Notes: 1) Very large firms: 5 firms with gross revenue over \$10 million.
 2) Exceptionally large firms: 3 largest firms (by gross revenue).

Average Revenue from Interactive Media

Average revenue from interactive media is the reported revenues that firms earn from their interactive media activities (rather than their revenues for all activities, which is their average gross revenue). Unlike average gross revenue, where the reported values are similar between content creators and enablers, the reported overall average revenue from interactive media for content creators is less than that for enablers, as shown in the following table.

Table 6. Average Revenue from Interactive Media by Primary Activity Group and Firm Size

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	\$56,199	\$364,844	\$2,533,966	\$566,024
Enabler	\$79,909	\$393,750	\$2,181,818	\$697,661

Note: Excludes firms with gross revenue over \$10 million.

As with average gross revenue, there is variation among primary activity groups in average revenue from interactive media. For average revenue from interactive media, interactive entertainment is the main task category with reported revenues that stand out among the other task categories.

Table 7. Average Revenue from Interactive Media by Primary Task Category

Primary Activity Group	Primary Task Category	Average Revenue from Interactive Media
Content Creator	Interactive Entertainment	\$1,240,743
	E-learning and Education	\$300,898
	Information and Reference	\$339,075
	Social, Culture and Arts	\$353,036
	Animation	\$572,534
	Other	\$431,542
Content Creator Overall		\$566,024
Enabler	Software Development	\$737,736
	Internet Application	\$778,421
	Other Enablers	\$246,500
Enabler Overall		\$697,661
Overall Average Revenue from Interactive Media		\$592,103

Note: Excludes firms with gross revenue over \$10 million.

The overall average revenue from interactive media of the respondents is \$592,103. For the very large firms, their reported average revenue from interactive media is about \$13.4 million. The reported average revenue from interactive media for the exceptionally large firms is over \$339 million.

Table 8. Average Revenue from Interactive Media for Very Large Firms

	Average Revenue from Interactive Media
Very Large Firms	\$13,370,000
Exceptionally Large Firms	\$339,333,333

For content creators overall, their reported gross revenue from interactive media is about 60% of their average gross revenue. Large firms for both content creators and enablers report a lower share of their revenues from interactive media than the small and medium firms. The overall average percentage of gross revenues from interactive media for enablers is about 75%, as shown below.

Table 9. Percentage of Gross Revenue from Interactive Media by Primary Activity Group and Firm Size

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	69.5%	66.7%	57.6%	59.7%
Enabler	83.7%	85.9%	72.7%	74.7%

Note: Excludes firms with gross revenue over \$10 million.

For both content creators and enablers, the reported overall percentage of gross revenue from interactive media is about 63%, as illustrated in Table 10. Among content creators, those whose primary task category is interactive entertainment or social, culture and arts report the greatest percentage of their revenues from interactive media, with about 90% for each. Among enablers, those primarily involved in software development and internet applications report 77.0% and 80.2% of their revenues from interactive media respectively. Other enablers are less focused on interactive media activities (at least on a revenue basis), with a reported 35.0% of gross revenue from interactive media activities.

Table 10. Percentage of Gross Revenue from Interactive Media by Primary Task Category

Primary Group	Primary Task Category	Percentage of Gross Revenue from Interactive Media
Content Creator	Interactive Entertainment	91.5%
	E-learning and Education	64.3%
	Information and Reference	53.5%
	Social, Culture and Arts	89.9%
	Animation	33.5%
	Other	26.7%
Content Creator Overall		59.7%
Enabler	Software Development	77.0%
	Internet Application	80.2%
	Other Enablers	35.0%
Enabler Overall		74.7%
Overall Percentage of Gross Revenue from Interactive Media		62.6%

Note: Excludes firms with gross revenue over \$10 million.

The very large and exceptionally large firms derive about 81% and 68% of their gross revenues from interactive media, as show in the table below.

Table 11. Percentage of Gross Revenue from Interactive Media for Very Large Firms

	Percentage of Gross Revenue from Interactive Media
Very Large Firms	80.5%
Exceptionally Large Firms	67.9%

Percentage of Interactive Media Revenue from Fee-for-Service Activities

Respondents to the survey were asked how their revenues from interactive media are split between fee-for-service activities and intellectual property development activities.

Overall, content creators report a greater share of their interactive media revenues from fee-for-service activities than enablers; content creators overall have 59.5% of their interactive media revenue from fee-for-service activities, while for enablers the value is 51.5%. There is not a substantial amount of variation in the percentage of interactive media revenue from fee-for-service activities by firm size for either the content creators or enablers.

Table 12. Percentage of Interactive Media Revenue from Fee-for-Service Activities by Primary Activity Group and Firm Size

Primary Activity Group	Small	Medium	Large	Overall
Content Creator	58.1%	61.6%	59.1%	59.5%
Enabler	47.4%	47.2%	52.5%	51.5%

Note: Excludes firms with gross revenue over \$10 million.

There is, however, more variation in the percentage of interactive media revenue from fee-for-service activities by primary task category. Among the content creators, the percentage varies from 31.2% for the "Other" category to 81.8% for information and reference. For the enablers, the percentage ranges from 22.1% for the "Other Enablers" to 65.6% for internet applications. These results are shown in the following table.

Table 13. Percentage Breakdown of Interactive Media Revenue from Fee-for-Service Activities and Intellectual Property Development by Primary Task Category

Primary Activity Group	Primary Task Category	Interactive Media Revenue from Fee-for-Service Activities	Interactive Media Revenue from Intellectual Property Development
Content Creator	Interactive Entertainment	52.4%	47.6%
	E-learning and Education	54.7%	45.3%
	Information and Reference	81.8%	18.2%
	Social, Culture and Arts	78.1%	22.0%
	Animation	61.7%	38.3%
	Other	31.2%	68.8%

Content Creator Overall		59.5%	40.5%
Enabler	Software Development	38.5%	61.5%
	Internet Application	65.6%	34.4%
	Other Enablers	22.1%	77.9%
Enabler Overall		51.5%	48.5%
Overall Interactive Media Revenue		57.6%	42.4%

Note: Excludes firms with gross revenue over \$10 million.

For the very large and exceptionally large respondents, their percentage of interactive media revenue from fee-for-service activities is much lower, at 29.5% for very large firms and 20.4% for exceptionally large firms as indicated in Table 14 below.

Table 14. Percentage of Interactive Media Revenue from Fee-for-Service Activities and Intellectual Property Development for Very Large Firms

	Interactive Media Revenue from Fee-for-Service Activities	Interactive Media Revenue from Intellectual Property Development
Very Large Firms	29.5%	70.5%
Exceptionally Large Firms	20.4%	79.6%

Percentage of Interactive Media Revenue from Intellectual Property Development Activities

Respondents were asked how their revenue from interactive media falls between fee-for-service and intellectual property development, so that the percentage of interactive media revenue from intellectual property development activities is equivalent to the percentage of interactive media revenues that are not from fee-for-service activities.

For content creators overall, the percentage of interactive media revenue from intellectual property development is 40.5%. This reverses the pattern of interactive media revenue from fee-for-service activities, where now enablers have a greater percentage of their interactive media revenue from intellectual property development, as compared to the content creators, at 48.5% for enablers overall.

Table 15. Percentage of Interactive Media Revenue from Intellectual Property Development Activities by Primary Activity Group and Firm Size

Primary Activity Group	Small	Medium	Large	Overall
Content Creator	41.9%	38.4%	40.9%	40.5%
Enabler	52.7%	52.8%	47.5%	48.5%

Note: Excludes firms with gross revenue over \$10 million.

The respondents' percentage of interactive media revenue from intellectual property development activities by primary task category is shown in Table 13 above. As illustrated above in Table 14, very large and exceptionally large firms report that over 70% of their interactive media revenue from intellectual property development.

Percentage of Firms with Secondary Interactive Media Activities

From the survey responses, it was possible to determine whether respondents were engaged in only one or in more than one interactive media activity. The following table shows the percentage of firms, who in addition to their primary work activity are also involved in other interactive media activities. For a content creator or an enabler, the secondary activity may be either content creator activities or enabler activities. For content creators, 31.8% of these respondents participate in a secondary interactive media activity. As the size of content creators increases, the percentage of respondents that have secondary interactive media activities also increases.

This is a similar pattern as the percentage of gross revenue from interactive media (in Table 9) for content creators, where the reported percentage of revenues from interactive media decreases as firm size increases. This indicates that larger content creator firms are more diversified in terms of overall business activity and interactive media activities than smaller content creator firms.

Table 16. Percentage of Firms with Secondary Interactive Media Activities by Primary Activity Group and Firm Size

Primary Activity Group	Small	Medium	Large	Overall
Content Creator	29.0%	33.3%	37.9%	31.8%
Enabler	50.0%	22.2%	63.6%	47.6%
Overall	33.0%	31.6%	45.0%	34.9%

Notes: 1) Excludes firms with gross revenue over \$10 million.

2) This is the percentage of firms that in addition to their primary activity, also conduct another type of interactive media activity (which may be either content creation or enabling work).

For enabler firms, 47.6% overall undertake interactive media activities in addition to their primary activity. The percentage of firms with secondary interactive media activities for enablers does not follow the same pattern as for content creators; medium-sized respondent firms have the lowest percentage with secondary interactive media activities at 22.2%, and large-sized respondents having the highest percentage at 63.6%.

As shown in Table 17, the percentage of firms by primary task category that have secondary interactive media activities for content creators ranges from about 18% for animation up to about 43% for social, culture and arts. For enablers, there were no respondents in the other enablers primary task category that had secondary interactive media activities. Nearly half (47.4%) of the enablers in the internet application primary task category have secondary interactive media activities, while just over 61% of the respondents in software development have secondary interactive media activities.

Table 17. Percentage of Firms with Secondary Interactive Media Activities by Primary Task Category

Primary Activity Group	Primary Task Category	Percentage of Firms with Secondary Interactive Media Activities
Content Creator	Interactive Entertainment	24.3%
	E-learning and Education	25.0%
	Information and Reference	41.5%
	Social, Culture and Arts	42.9%
	Animation	18.2%
	Other	41.7%
Content Creator Overall		31.8%
Enabler	Software Development	61.1%
	Internet Application	47.4%
	Other Enablers	0.0%
Enabler Overall		47.6%
Overall Percentage of Firms with Secondary Interactive Media Activities		34.9%

Note: Excludes firms with gross revenue over \$10 million.

The very large and exceptionally large firms appear to be much more focused on their primary activity. Among the very large firms, 20% of respondents have secondary interactive media activities, while none of the exceptionally large firm respondents were engaged in secondary interactive media activities.

Table 18. Percentage of Very Large Firms with Secondary Interactive Media Activities

	Percentage of Firms with Secondary Interactive Media Activities
Very Large Firms	20.0%
Exceptionally Large Firms	0.0%

Note: This is the percentage of firms that in addition to their primary activity, also conduct another type of interactive media activity (which may be either content creation or enabling work).

BUSINESS PERFORMANCE

Business Performance Compared to Last Year

Respondents were asked to indicate how they feel about their company's business as compared to last year. Overall, over 92% of respondents indicated that their business is the same or better as compared to last year. Among the content creator respondents, about 90.8% rated their business as the same or better than last year, while about 97.7% of enablers had the same sentiment.

There were no respondents among the large firms that indicated that their company's business was worse than last year. Among the respondents, only small firms indicated that their company's business was worse than last year, with about 15% of small content creators responding that their business was worse or much worse, and about 5% of small enablers responding that their business was worse. These results are shown in Table 19 below.

Table 19. Business Performance Compared to Last Year by Primary Activity Group and Firm Size

Primary Activity Group	Size	Much Better	Better	Same	Worse	Much Worse
Content Creator	Small	28.7%	33.3%	23.0%	6.9%	8.1%
	Medium	41.7%	31.3%	22.9%	4.2%	0.0%
	Large	34.5%	51.7%	13.8%	0.0%	0.0%
Content Creator Overall		33.5%	36.0%	21.3%	4.9%	4.3%
Enabler	Small	22.7%	50.0%	22.7%	4.6%	0.0%
	Medium	22.2%	55.6%	22.2%	0.0%	0.0%
	Large	54.6%	36.4%	9.1%	0.0%	0.0%
Enabler Overall		31.0%	47.6%	19.1%	2.4%	0.0%
Overall Business Performance Compared to Last Year		33.0%	38.4%	20.9%	4.4%	3.4%

Note: Excludes firms with gross revenue over \$10 million.

By primary task category, there were also some categories where no respondents indicated that their company's business was worse than last year; these are e-learning and education, software development, and internet application. Respondents in the e-learning and education category and the internet application category were the most optimistic, with over 84% of respondents in both categories indicating that their company's business was better or much better as compared to last year. Respondents in the social, culture and arts and animation categories were the least optimistic, with about 50% of respondents indicating that their company's business was better or much better than last year.

Table 20. Business Performance Compared to Last Year by Primary Task Category

Primary Activity Group	Primary Task Category	Much Better	Better	Same	Worse	Much Worse
Content Creator	Interactive Entertainment	38.2%	41.2%	11.8%	5.9%	2.9%
	E-learning and Education	40.6%	43.8%	15.6%	0.0%	0.0%
	Information and Reference	33.3%	33.3%	27.5%	2.0%	3.9%
	Social, Culture and Arts	21.4%	28.6%	28.6%	14.3%	7.1%
	Animation	27.3%	22.7%	31.8%	9.1%	9.1%
	Other	27.3%	45.5%	9.1%	9.1%	9.1%
Content Creator Overall		33.5%	36.0%	21.3%	4.9%	4.3%
Enabler	Software Development	16.7%	61.1%	22.2%	0.0%	0.0%
	Internet Application	47.4%	36.8%	15.8%	0.0%	0.0%
	Other Enablers	20.0%	40.0%	20.0%	20.0%	0.0%
Enabler Overall		31.0%	47.6%	19.1%	2.4%	0.0%
Overall Business Performance Compared to Last Year		33.0%	38.4%	20.9%	4.4%	3.4%

Note: Excludes firms with gross revenue over \$10 million.

Among the very large and exceptionally large respondents, all indicated that their company's business was at least the same as last year. About 80.0% of very large firms and all of the exceptionally large firms indicated that their company's business was better or much better than last year.

Table 21. Business Performance Compared to Last Year for Very Large Firms

Size	Much Better	Better	Same	Worse	Much Worse
Very Large	40.0%	40.0%	20.0%	0.0%	0.0%
Exceptionally Large	0.0%	100.0%	0.0%	0.0%	0.0%

EMPLOYMENT

Average Interactive Media Employment

The estimated overall average interactive media employment among small, medium, and large sized firms combined is about ten people. The profile of average employment is similar for small content creators and small enablers. Medium-sized enablers have a higher number of employees, particularly in full time staff. Large content creators report more employees of all types than large enablers. These results are shown in Table 22 below.

Among the respondents, small and medium-sized firms rely on subcontractors much more than large firms. For both small content creators and small enablers, the reported number of subcontractors is greater than the reported number of full time staff.

Table 22. Average Interactive Media Employment by Primary Activity Group and Firm Size

Primary Activity Group	Size	Full Time	Part Time	Subcontractor	Overall
Content Creator	Small	1.4	0.6	2.6	4.6
	Medium	4.3	1.3	3.5	9.2
	Large	24.0	3.0	3.8	30.8
Content Creator Overall		6.1	1.2	3.1	10.4
Enabler	Small	1.7	0.5	2.0	4.1
	Medium	7.7	1.5	3.9	13.1
	Large	14.6	2.2	2.4	19.2
Enabler Overall		6.4	1.1	2.5	10.0
Overall Average Interactive Media Employment		6.1	1.2	3.0	10.3

Note: Excludes firms with gross revenue over \$10 million.

By primary task category, interactive entertainment has the greatest average interactive media employment with 19.5 people employed overall and 14.5 full time employees, as shown in the table below. The social, culture and arts and information and reference categories have the lowest number of reported employment overall, with about 6 employees each. Along with e-learning and education, other content creators, and other enablers, these categories rely relatively more on sub-contractors, where the reported number of sub-contractors is about the same or higher than the number of reported full time employees.

Table 23. Average Interactive Media Employment by Primary Task Category

Primary Activity Group	Primary Task Category	Full Time	Part Time	Subcontractor	Overall
Content Creator	Interactive Entertainment	14.5	1.6	3.4	19.5
	E-Learning and Education	3.6	1.2	4.0	8.7
	Information and Reference	2.8	1.0	2.4	6.3
	Social, Culture and Arts	2.2	0.6	3.0	5.8
	Animation	7.8	0.7	1.8	10.3
	Other	2.5	2.6	4.7	9.8
Content Creator Overall		6.1	1.2	3.1	10.4
Enabler	Software Development	8.0	0.8	1.7	10.6
	Internet Application	5.6	1.5	2.8	9.9
	Other Enablers	3.0	1.0	4.1	8.1
Enabler Overall		6.4	1.1	2.5	10.0
Overall Average Interactive Media Employment		6.1	1.2	3.0	10.3

Note: Excludes firms with gross revenue over \$10 million.

The general pattern of average revenue from interactive media is somewhat reflected in the results for average interactive media employment. Among respondents, the category with the highest average revenue from interactive media is interactive entertainment. This category also has the greatest number of reported average interactive media employment. Among the content creators, the next highest average revenue from interactive media is animation, which also has the next highest average interactive media employment. This pattern is less apparent among the enabler categories, but the software development and internet application categories both have a higher reported average interactive media employment and average revenue from interactive media as compared to the other enablers.

The reported average interactive media employment for very large and exceptionally large firms is an order of magnitude above that for the smaller firms. The reported overall average interactive media employment is about 136 people for very large firms and about 171 people for exceptionally large firms. Among the respondents, the exceptionally large firms have more part-time staff than the very large firms, but about the same number of subcontractors.

Table 24. Average Interactive Media Employment for Very Large Firms

	Full Time	Part Time	Subcontractor	Overall
Very Large Firms	128.8	1.6	5.4	135.8
Exceptionally Large Firms	105.0	60.0	5.5	170.5

PROJECT TYPE

Sales Channel for Interactive Media Products and Services

Respondents were asked to indicate their primary sales channel for their interactive media products and services. Direct sales are the most common sales channel for content creators and for enablers. For content creators overall, the next most common primary sales channel is a publisher, followed by licensing, distributor, and other channels. There is some variation among firm size, however, with a distributor being the second most common sales channel for medium-sized content creators, and a publisher the second most common sales channel for large content creators.

For enablers overall, direct sales is followed by licensing, distributor, and other sales channels. Only medium-sized enablers indicated that their primary sales channel was through a publisher. These results are shown in Table 25.

Table 25. Sales Channel by Primary Activity Group and Firm Size

Primary Activity Group	Size	Direct Sales	Licensing	Distributor	Publisher	Other
Content Creator	Small	59.1%	12.9%	6.5%	12.9%	8.6%
	Medium	70.8%	8.3%	10.4%	4.2%	6.3%
	Large	55.2%	3.5%	10.3%	24.1%	6.9%
Content Creator Overall		61.8%	10.0%	8.2%	12.4%	7.7%
Enabler	Small	68.2%	18.2%	9.1%	0.0%	4.6%
	Medium	66.7%	11.1%	0.0%	11.1%	11.1%
	Large	63.6%	18.2%	9.1%	0.0%	9.1%
Enabler Overall		66.7%	16.7%	7.1%	2.4%	7.1%
Overall Sales Channel		62.7%	11.3%	8.0%	10.4%	7.6%

Note: Excludes firms with gross revenue over \$10 million.

When examined by primary task category, as shown in Table 26, it becomes apparent that while direct sales is the primary sales channel for most categories, there are some notable exceptions. About 41% of respondents in the interactive entertainment category indicated that a publisher was their primary sales channel. The interactive entertainment category is the only one where a publisher was indicated as the most common sales channel. Respondents in the social, culture and arts category also indicate that licensing (21.4%) and other sales channels (14.3%) are fairly common. Respondents in the animation category are the most reliant on distributors as their primary sales channel, with about 23% of these respondents indicating distributor as their primary sales channel. Licensing is most commonly used by respondents in the other content creator category and the social, culture and arts category.

Licensing follows direct sales as the most common sales channels for the enabler categories overall, although those in the internet application category indicate that other sales channels are the most common after direct sales. For the other enablers grouping, licensing is as common as direct sales.

Table 26. Sales Channel by Primary Task Category

Primary Activity Group	Primary Task Category	Direct Sales	Licensing	Distributor	Publisher	Other
Content Creator	Interactive Entertainment	32.4%	16.2%	5.4%	40.5%	5.4%
	E-learning and Education	59.4%	9.4%	12.5%	6.3%	12.5%
	Information and Reference	86.8%	1.9%	1.9%	3.8%	5.7%
	Social, Culture and Arts	57.1%	21.4%	0.0%	7.1%	14.3%
	Animation	68.2%	4.6%	22.7%	0.0%	4.6%
	Other	41.7%	25.0%	16.7%	8.3%	8.3%
Content Creator Overall		61.8%	10.0%	8.2%	12.4%	7.7%
Enabler	Software Development	55.6%	22.2%	11.1%	5.6%	5.6%
	Internet Application	84.2%	5.3%	0.0%	0.0%	10.5%
	Other Enablers	40.0%	40.0%	20.0%	0.0%	0.0%
Enabler Overall		66.7%	16.7%	7.1%	2.4%	7.1%
Overall Sales Channel		62.7%	11.3%	8.0%	10.4%	7.6%

Note: Excludes firms with gross revenue over \$10 million.

Among the very large and exceptionally large respondents, direct sales and publisher were the only sales channels that were indicated as the primary sales channel, with the majority indicating publisher as their primary sales channel.

Table 27. Sales Channel for Very Large Firms

	Direct Sales	Licensing	Distributor	Publisher	Other
Very Large Firms	20.0%	-	-	80.0%	-
Exceptionally Large Firms	33.3%	-	-	66.7%	-

END USERS OF INTERACTIVE MEDIA PRODUCTS AND SERVICES

End Users of Fee-for-Service Products and Services

The majority of end-users of fee-for-service products and services of the respondents are either consumer audiences or businesses. For content creators overall, about 34% of firms that responded indicated that the majority of the end users of their products and services are consumer audiences, and about 40% characterized the majority of their end users as businesses. Educational institutions, government institutions, and non-profit organizations were selected as the majority of end users for about 7% to 9% of content creator respondents overall. At 5% or less, these types of organizations were indicated as the least common end-users. Among the enablers that responded, only small enablers indicated government institutions as the majority of end users, and similarly only medium-sized enablers indicated non-profit organizations as the majority of end users. For enablers overall, about 60% indicated the majority of their end-users are businesses, and about 33% indicated consumer audiences.

Table 28. End Users of Fee-for-Service Products and Services by Primary Activity Group and Firm Size

Primary Activity Group	Size	Consumer Audience	Educational Institution	Government Institution	Non-Profit Organization	Business	Other
Content Creator	Small	35.1%	9.5%	8.1%	10.8%	32.4%	4.1%
	Medium	28.6%	7.1%	7.1%	9.5%	47.6%	0.0%
	Large	40.0%	8.0%	4.0%	0.0%	48.0%	0.0%
Content Creator Overall		34.0%	8.5%	7.1%	8.5%	39.7%	2.1%
Enabler	Small	23.8%	0.0%	9.5%	0.0%	66.7%	0.0%
	Medium	44.4%	0.0%	0.0%	11.1%	44.4%	0.0%
	Large	40.0%	0.0%	0.0%	0.0%	60.0%	0.0%
Enabler Overall		32.5%	0.0%	5.0%	2.5%	60.0%	0.0%
Overall Sales Channel		33.7%	6.6%	6.6%	7.2%	44.2%	1.7%

Note: Excludes firms with gross revenue over \$10 million.

By primary task category, the e-learning and education and information and reference categories have the most varied end users for their fee-for-service products and services, with some respondents in these categories having each type of end-user as the majority of their end users. Among content creators, those in the interactive entertainment, animation, and other categories have only consumer audiences and businesses as the majority of their end users. Among the enablers, the same statement holds for software development and for other enablers. This is shown below in Table 29.

Table 29. End Users of Fee-for-Service Products and Services by Primary Task Category

Primary Activity Group	Primary Task Category	Consumer Audience	Educational Institution	Government Institution	Non-Profit Organization	Business	Other
Content Creator	Interactive Entertainment	68.2%	0.0%	0.0%	0.0%	31.8%	0.0%
	E-learning and Education	10.7%	28.6%	21.4%	3.6%	28.6%	7.1%
	Information and Reference	28.9%	1.9%	7.7%	7.7%	53.9%	0.0%
	Social, Culture and Arts	23.1%	23.1%	0.0%	30.8%	23.1%	0.0%
	Animation	55.6%	0.0%	0.0%	11.1%	33.3%	0.0%
	Other	25.0%	0.0%	0.0%	12.5%	50.0%	12.5%
Content Creator Overall		34.0%	8.5%	7.1%	8.5%	39.7%	2.1%
Enabler	Software Development	47.1%	0.0%	0.0%	0.0%	52.9%	0.0%
	Internet Application	21.1%	0.0%	10.5%	5.3%	63.2%	0.0%
	Other Enablers	25.0%	0.0%	0.0%	0.0%	75.0%	0.0%
Enabler Overall		32.5%	0.0%	5.0%	2.5%	60.0%	0.0%
Overall Sales Channel		33.7%	6.6%	6.6%	7.2%	44.2%	1.7%

Note: Excludes firms with gross revenue over \$10 million.

For the very large firms, all of the respondents indicated that the majority of their end-users for their fee-for-service products and services are businesses. For the exceptionally large firms, all respondents selected consumer audiences as the majority of their fee-for-service end-users.

Table 30. End Users of Fee-for-Service Products and Services for Very Large Firms

	Consumer Audience	Educational Institution	Government Institution	Non-Profit Organization	Business	Other
Very Large Firms	-	-	-	-	100.0%	-
Exceptionally Large Firms	100.0%	-	-	-	-	-

End Users of Intellectual Property Products and Services

As compared to the end users of fee-for-service products and services, the results for intellectual property products and services are similar. As shown in Table 31 below, either consumer audiences or businesses were selected as the majority of end users for most respondents. Consumer audiences form the majority of end users for 50% or more of content creators and enablers overall. About 12% of content creators indicated that the majority of their intellectual property end users are educational institutions, as compared to about 8.5% for

fee-for-service end users. While about 2.5% of enablers overall indicated that non-profit organizations are the majority of their fee-for-service end users, about 8% indicate that non-profit organizations are the majority of their intellectual property end users.

Table 31. End Users of Intellectual Property Products and Services by Primary Activity Group and Firm Size

Primary Activity Group	Size	Consumer Audience	Educational Institution	Government Institution	Non-Profit Organization	Business	Other
Content Creator	Small	52.1%	12.3%	4.1%	6.9%	19.2%	5.5%
	Medium	54.8%	11.9%	2.4%	9.5%	21.4%	0.0%
	Large	58.3%	12.5%	0.0%	4.2%	25.0%	0.0%
Content Creator Overall		54.0%	12.2%	2.9%	7.2%	20.9%	2.9%
Enabler	Small	63.2%	5.3%	5.3%	0.0%	26.3%	0.0%
	Medium	44.4%	0.0%	0.0%	22.2%	33.3%	0.0%
	Large	30.0%	0.0%	10.0%	10.0%	50.0%	0.0%
Enabler Overall		50.0%	2.6%	5.3%	7.9%	34.2%	0.0%
Overall		53.1%	10.2%	3.4%	7.3%	23.7%	2.3%

Note: Excludes firms with gross revenue over \$10 million.

For content creators overall and for enablers overall, the end users of intellectual property products and services are fairly similar. When considered by primary task category, however, there is considerable variation in the percentage of respondents selecting particular types of end users as the majority of their overall end users. For example, 90% of the content creators who are primarily engaged in interactive entertainment indicated that consumer audiences form the majority of their end users. Similarly, all of the respondents in the other enablers task category indicated consumer audiences as their main end-user. Only among the respondents in the e-learning and education and internet application task categories was there a majority of their end users from across all end user types (excluding the "Other" type for internet applications). This is illustrated in the following table.

Table 32. End Users of Intellectual Property Products and Services by Primary Task Category

Primary Activity Group	Primary Task Category	Consumer Audience	Educational Institution	Government Institution	Non-Profit Organization	Business	Other
Content Creator	Interactive Entertainment	93.9%	0.0%	3.0%	0.0%	3.0%	0.0%
	E-learning and Education	23.1%	30.8%	11.5%	7.7%	19.2%	7.7%
	Information and Reference	50.0%	7.9%	0.0%	10.5%	31.6%	0.0%
	Social, Culture and Arts	38.5%	23.1%	0.0%	23.1%	15.4%	0.0%
	Animation	50.0%	11.1%	0.0%	0.0%	38.9%	0.0%
	Other	45.5%	9.1%	0.0%	9.1%	18.2%	18.2%
Content Creator Overall		54.0%	12.2%	2.9%	7.2%	20.9%	2.9%
Enabler	Software Development	61.1%	0.0%	0.0%	0.0%	38.9%	0.0%
	Internet Application	25.0%	6.3%	12.5%	18.8%	37.5%	0.0%
	Other Enablers	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Enabler Overall		50.0%	2.6%	5.3%	7.9%	34.2%	0.0%
Overall Sales Channel		53.1%	10.2%	3.4%	7.3%	23.7%	2.3%

Note: Excludes firms with gross revenue over \$10 million.

Most of the respondents among the very large firms indicated that consumer audiences were their main end-user, at 80%, with business comprising the remaining 20%. For exceptionally large firms, consumer audience was listed by all respondents as the main end user.

Table 33. End Users of Intellectual Property Products and Services for Very Large Firms

	Consumer Audience	Educational Institution	Government Institution	Non-Profit Organization	Business	Other
Very Large Firms	80.0%	-	-	-	20.0%	-
Exceptionally Large Firms	100.0%	-	-	-	-	-

EXPORTS

Percentage of Firms that Export

Overall, well over half of the respondents indicated that they export their goods and services. About two-thirds of the respondents in the enablers group indicated that they export, while about 56% of respondents in the content creator group indicated that they export. As compared to the enablers, however, the content creator respondents report that a higher percentage of their business is for export with nearly half for the content creator respondents, and about one-third for the enabler respondents. This is shown below in Table 34.

Table 34. Percentage of Firms that Export by Primary Activity Group and Firm Size

Primary Activity Group	Size	Percentage of Firms that Export	Average Percentage of Business for Export
Content Creator	Small	44.1%	53.4%
	Medium	62.5%	30.1%
	Large	82.8%	63.2%
Content Creator Overall		55.9%	48.5%
Enabler	Small	68.2%	38.3%
	Medium	44.4%	37.5%
	Large	81.8%	25.2%
Enabler Overall		66.7%	34.0%
Overall		58.0%	45.2%

Note: Excludes firms with gross revenue over \$10 million.

When examined by primary task category, the percentage of firms that indicated that they export ranges from about 36% to 76%, with about 27% to 70% of business for export for the content creators. Among enablers, the percentage of firms that indicated that they export ranges from about 63% to 80%, with about 23% to 44% of business for export.

Table 35. Percentage of Firms that Export by Primary Task Category

Primary Activity Group	Primary Task Category	Percentage of Firms that Export	Average Percentage of Business for Export
Content Creator	Interactive Entertainment	75.7%	69.4%
	E-learning and Education	46.9%	48.7%
	Information and Reference	52.8%	26.9%
	Social, Culture and Arts	35.7%	40.0%
	Animation	54.6%	47.1%
	Other	58.3%	60.0%
Content Creator Overall		55.9%	48.5%
Enabler	Software Development	66.7%	43.7%
	Internet Application	63.2%	22.7%
	Other Enablers	80.0%	38.8%
Enabler Overall		66.7%	34.0%
Overall		58.0%	45.2%

Note: Excludes firms with gross revenue over \$10 million.

All of the very large and exceptionally large firms indicated that they export, although the 37.7% of business for export reported by the exceptionally large firms was much lower than the 98.0% reported by very large firms.

Table 36. Percentage of Very Large Firms that Export

	Percentage of Firms that Export	Average Percentage of Business for Export
Very Large Firms	100.0%	98.0%
Exceptionally Large Firms	100.0%	37.7%

Sales Channel for Exports

Overall, the most common sales channel for exports is through direct sales, with about 63% of respondents indicating this sales channel, as compared to 13% using an agent, and about 24% using both direct sales and an agent. The results by firm size are detailed in the following table.

Table 37. Sales Channels for Exports by Primary Activity Group and Firm Size

Primary Activity Group	Size	Direct Sales	Through Agent	Both
Content Creator	Small	61.0%	7.3%	31.7%
	Medium	56.7%	23.3%	20.0%
	Large	66.7%	12.5%	20.8%
Content Creator Overall		61.1%	13.7%	25.3%
Enabler	Small	80.0%	13.3%	6.7%
	Medium	50.0%	25.0%	25.0%
	Large	66.7%	0.0%	33.3%
Enabler Overall		71.4%	10.7%	17.9%
Overall		63.4%	13.0%	23.6%

Note: Excludes firms with gross revenue over \$10 million.

Direct sales of exports is the most common for respondents in the information and reference; social, culture and arts; and internet application task categories, as shown below. In each of these categories, 80% or more of respondents indicated that they utilize direct sales for their exports.

Table 38. Sales Channels for Exports by Primary Task Category

Primary Activity Group	Primary Task Category	Direct Sales	Through Agent	Both
Content Creator	Interactive Entertainment	50.0%	28.6%	21.4%
	E-learning and Education	26.7%	13.3%	60.0%
	Information and Reference	89.3%	7.1%	3.6%
	Social, Culture and Arts	80.0%	0.0%	20.0%
	Animation	58.3%	8.3%	33.3%
	Other	57.1%	0.0%	42.9%
Content Creator Overall		61.1%	13.7%	25.3%
Enabler	Software Development	66.7%	8.3%	25.0%
	Internet Application	91.7%	0.0%	8.3%
	Other Enablers	25.0%	50.0%	25.0%
Enabler Overall		71.4%	10.7%	17.9%
Overall		63.4%	13.0%	23.6%

Note: Excludes firms with gross revenue over \$10 million.

For very large firms, direct sales is most common (60.0%), with the remaining respondents split evenly between using an agent and using both direct sales and an agent. There were no respondents among the exceptionally large firms that indicated that they use an agent only; about two-thirds use direct sales and about one-third use both direct sales and an agent.

Table 39. Sales Channels for Exports for Very Large Firms

	Direct Sales	Through Agent	Both
Very Large Firms	60.0%	20.0%	20.0%
Exceptionally Large Firms	66.7%	-	33.3%

SOURCES OF FUNDING AND FINANCING

Funding Sources for Fee-for-Service Activities

Among the respondents involved in fee-for-service activities, the most commonly accessed source of funding in the last year for content creators is bank financing, while for enablers bank financing and the Scientific Research and Experimental development (SR&ED) tax credit are tied as the most commonly accessed funding sources. The ranking of funding sources is shown in the table below; a ranking of one indicates that the particular funding source is accessed most frequently by the respondents.

Table 40. Ranking of Funding Sources for Fee-for-Service Activities

Funding Source for Fee-for-Service Activities	Content Creator	Enabler
Bank Financing	1	1
Provincial Tax Credit	2	2
SR&ED	3	1
Provincial Funding Program	4	3
IRAP	6	4
Other	5	4

Notes: 1) Excludes firms with gross revenue over \$10 million.

2) Funding sources are ranked in descending order. For example, bank financing is accessed by the greatest number of respondents for both content creators and enablers.

Most respondents that conduct fee-for-service activities have accessed only one funding source over the last year. Overall, about 40% of respondents that participate in fee-for-service activities have accessed more than one funding source, as shown below.

Table 41. Number of Funding Sources Accessed for Fee-for-Service Activities

Number of Funding Sources Accessed for Fee-for-Service Activities	Content Creator	Enabler	Overall
Only One	56.4%	78.6%	60.9%
Two to Three	36.4%	21.4%	33.3%
Four to Five	7.3%	0.0%	5.8%

Notes: 1) Excludes firms with gross revenue over \$10 million.

2) Out of a total of 55 content creators and 14 enablers.

The most common funding sources accessed by the very large and exceptionally large respondents that conduct fee-for-service activities are provincial tax credits, SR&ED tax credits and provincial funding programs.

Table 42. Ranking of Funding Sources for Fee-for-Service Activities

Number of Funding Sources Accessed for Fee-for-Service Activities	Very Large Firms	Exceptionally Large Firms	Overall
Provincial Tax Credit	1	-	1
SR&ED	2	1	1
Provincial Funding Program	2	1	1
Bank Financing	2	-	2
IRAP	-	-	-
Other	-	-	-

Note: Funding sources are ranked in descending order.

Among the very large and exceptionally large firms that indicated they have accessed funding for fee-for-service activities over the last year, all had accessed between one to three sources of funding.

Table 43. Number of Funding Sources Accessed for Fee-for-Service Activities for Very Large Firms

Number of Funding Sources Accessed for Fee-for-Service Activities	Very Large Firms	Exceptionally Large Firms	Overall
Only One	0.0%	100.0%	50.0%
Two to Three	100.0%	0.0%	50.0%
Four to Five	0.0%	0.0%	0.0%

Note: Out of a total of 7 content creators and 1 enabler.

Funding Sources for Intellectual Property Development Activities

For respondents that indicated they accessed funding for intellectual property development over the last year, the most common funding source is cash flow. For content creators, the next most common source was Telefilm, followed by friends and family. For enablers, cash flow was followed by bank financing and Telefilm as the most common funding sources, as illustrated in the table below.

Overall, among the respondents that have accessed funding for intellectual property development activities, about 15% accessed the Bell Broadcast and New Media Fund, and about 32% accessed Telefilm funding.

Table 44. Ranking of Funding Sources for Intellectual Property Development Activities

Funding Source for Intellectual Property Development Activities	Content Creator	Enabler
Cash Flow	1	1
Telefilm	2	3
Friends & Family	3	5
Provincial Tax Credit	4	6
Provincial Funding Program	5	5
Bank Financing	6	2
Bell Broadcast & New Media Fund	7	5
SR&ED	8	4
Angel Investment	9	4
Banff New Media	10	6
IRAP	10	6
New Media Research Network	11	6
Virtual Museum of Canada	11	5
Other	6	6

Notes: 1) Excludes firms with gross revenue over \$10 million.

2) Funding sources are ranked in descending order. For example, cash flow is accessed by the greatest number of respondents for both content creators and enablers.

About 40% of respondents that have accessed funding sources for intellectual property development activities have accessed one funding source, while about 33% have accessed two to three sources, about 23% have accessed four to five sources, and about 4% have accessed more than five sources of funding.

Table 45. Number of Funding Sources Accessed for Intellectual Property Development Activities

Number of Funding Sources Accessed for Intellectual Property Development Activities	Content Creator	Enabler	Overall
Only One	35.5%	56.0%	39.3%
Two to Three	35.5%	24.0%	33.3%
Four to Five	23.6%	20.0%	23.0%
Over Five	5.5%	0.0%	4.4%

Notes: 1) Excludes firms with gross revenue over \$10 million.

2) Out of a total of 110 content creators and 25 enablers.

For the intellectual property development activities of very large firms, the most common funding source accessed is the Scientific Research and Experimental Development (SR&ED) tax credit, followed by provincial tax credits, cash flow, other sources, provincial funding, and bank financing. Among the exceptionally large respondents, SR&ED was the only funding source indicated.

Table 46. Ranking of Funding Sources for Intellectual Property Development Activities

Funding Source for Intellectual Property Development Activities	Very Large	Exceptionally Large	Overall
SR&ED	1	1	1
Provincial Tax Credit	2	-	2
Cash Flow	3	-	3
Provincial Funding Program	4	-	4
Bank Financing	4	-	4
Telefilm	-	-	-
Friends & Family	-	-	-
Bell Broadcast & New Media Fund	-	-	-
Angel Investment	-	-	-
Banff New Media	-	-	-
IRAP	-	-	-
New Media Research Network	-	-	-
Virtual Museum of Canada	-	-	-
Other	3	-	3

Note: Funding sources are ranked in descending order.

About 60% of the very large firm respondents accessed two to three funding sources for intellectual property development activities, while all of the exceptionally large firm respondents accessed one funding source for intellectual property development activities.

Table 47. Number of Funding Sources Accessed for Intellectual Property Development Activities for Very Large Firms

Number of Funding Sources Accessed for Intellectual Property Development Activities	Very Large Firms	Exceptionally Large Firms	Overall
Only One	20.0%	100.0%	33.3%
Two to Three	60.0%	0.0%	50.0%
Four to Five	20.0%	0.0%	16.7%

Note: Out of a total of 7 content creators and 1 enabler.

PART III: NATIONAL PROFILE

INTRODUCTION

To estimate the size of the Interactive Media Industry in Canada, we requested input from industry representatives, including members of the Canadian Interactive Alliance / Alliance Interactive Canadienne (CIAIC). Industry representatives were asked to provide information on the number and size of interactive media firms by province. We then supplemented this information with additional industry information and interviews with industry and government representatives.

We have extrapolated the results of the survey to these industry estimates in order to provide estimates for the overall size of the Interactive Media Industry in Canada. This section of the report includes estimated revenue and employment of the Interactive Media Industry in Canada. It is important to note that these estimates report approximations rather than precise figures, as precise data were not available from some provinces.

It is also important to note that the profile of the Canadian Interactive Media Industry is based on the survey results, combined with input from industry representatives. The purpose of the profile information is to provide an overall snapshot of the size and activities of participants in Canada's Interactive Media Industry. Given the dynamic nature of the Interactive Media Industry, this profile will likely change over time, and this summary is meant to illustrate the current landscape of the industry, given the information collected through the survey and the input provided by industry representatives.

As in the previous section that discusses the survey results, we have separated the very large firms from other firms, so that the information of the very large firms does not dominate the overall results. These very large firms are referred to as "Very Large Firms" and "Exceptionally Large Firms". Both groups of very large firms include firms with gross revenues over \$10 million.

Based on the input provided by industry representatives, there are approximately 3,200 firms active in the Interactive Media Industry across Canada. Nearly half of these firms are small, with gross revenues less than \$250,000. About 30% of firms are medium-sized (with gross revenues between \$250,000 and \$1 million), and about 17% of firms are large (with gross revenues between \$1 million and \$10 million). Approximately 3% of firms have gross revenues of \$10 million or more. In terms of the number of firms, the Interactive Media Industry is primarily composed of content creators, with about 71% of firms engaged primarily in content creation activities.

REVENUE

Total Gross Revenue

Total gross revenue is the estimated revenue of firms that participate in the Interactive Media Industry, and includes revenues earned from activities other than interactive media.

The estimated total gross revenue for small, medium, and large sized firms is between \$2.77 billion and \$3.13 billion. For very large and exceptionally large firms combined, estimated total gross revenue is \$4.30 billion. For all firms overall, the estimated total gross revenue is between \$7.07 billion and \$7.43 billion.

Total Revenue from Interactive Media

Total revenue from interactive media is the estimated revenue that firms earn from their activities in interactive media only. The estimated total revenue from interactive media for small, medium, and large-sized firms combined is between \$1.78 and \$1.86 billion.

For very large firms and exceptionally large firms (firms with gross revenue over \$10 million), the estimated total revenue from interactive media is \$3.15 billion. The overall estimated total revenue from interactive media for all firms is between \$4.93 billion and \$5.01 billion.

EMPLOYMENT

Interactive Media Employment

The overall estimated total number of full time employees in interactive media is between 32,800 to 34,300 people. There are estimated to be an additional 7,800 to 7,900 people employed part time in interactive media, and an additional 9,700 to 9,900 people employed as subcontractors. In total, there are estimated to be between 50,300 and 52,100 people working in interactive media.

Among small, medium, and large sized content creators, the estimated total number of people working in interactive media is between 22,300 and 23,600. Among small, medium, and large sized enablers, the estimated total number of people working in interactive media is between 8,600 and 9,200. These estimates include full time employees, part time employees, or subcontractors.

At content creation firms, there are estimated to be about 12,900 to 14,000 full time employees, about 2,600 to 2,700 part time employees, and about 6,800 to 6,900 subcontractors involved in interactive media activities.

Enabler firms are estimated to have about 5,400 to 5,800 full time employees, about 900 to 1,000 part time employees, and about 2,300 to 2,400 subcontractors in interactive media activities.

For very large and exceptionally large firms combined, it is estimated that there are about 14,500 full time employees, about 4,200 part time employees, and about 600 subcontractors active in interactive media.

SUMMARY

The following table presents the national profile of Canada's Interactive Media Industry.

Table 48. Highlights of Interactive Media Industry National Profile

	National Profile (All Firms)
Number of Firms	3,200
Total Gross Revenue	\$7.07 billion to \$7.43 billion
Total Revenue from Interactive Media	\$4.93 billion to \$5.01 billion
Interactive Media Employment (full time, part time and subcontractors)	50,300 to 52,100

APPENDIX A: ALTERNATE APPROACHES

Satellite Account

An alternative approach for measuring the health and performance of the Interactive Media Industry would be the development of an "Interactive Media Industry Satellite Account". Satellite accounts are intended to allow for the comparison of industries and commodities that are not explicitly identified in the System of National Accounts (SNA). Satellite accounts include the standard measures of productive activity, income, and expenditures that are comparable to the standard national accounts measures. The main benefit of satellite accounts is the ability to introduce classification systems that are more appropriate for a given industry than the existing structure or definition. In Canada, there are satellite accounts for tourism (Tourism Satellite Account) and for the non-profit sector (Satellite Account of Non-profit Institutions and Volunteering).

Satellite accounts are intended to allow for the measurement of an aggregate industry that is comprised of several other industries. For example, the industries included in the Tourism Satellite Account are transportation, accommodation, food and beverage services, recreation and entertainment, and travel agencies. These industries may also produce non-tourism commodities. Similarly, tourism commodities can be produced by non-tourism industries. Indicators for tourism are based on the commodities and industries as defined in the satellite account.

Relative to our suggested approach for classifying the Interactive Media Industry, the use of a satellite account is more complicated, and would require an accurate estimate of the share of commodity receipts that are attributable to the Interactive Media Industry. The satellite accounts system is relatively complex because both commodities and industries are included.

North American Product Classification System

The North American Product Classification System (NAPCS) is a demand-based classification system for products. It differs from the North American Industry Classification System (NAICS) in that industry classification is activity-based, while product classification focuses on the output of industries. The product classification will be linked to the NAICS, by identifying the products of the NAICS industries. The NAPCS is a new classification system that will be introduced for 2007.

Although some work has been conducted in promoting the product-based classification of Interactive Media Industry, much of the work to date has been focused on an industry classification. Achieving consensus on an industry-based classification may therefore be less challenging than achieving consensus on a product-based classification. At a later point in time, however, a product-based classification for the Interactive Media Industry could be re-examined with the intent of being included in the NAPCS.

APPENDIX B: SUMMARY OF REPORTS

The following table summarizes the prior reports that we reviewed, and describes each report's approach and classification system. The table also includes our comments on the applicability of each report's definition of the Interactive Media Industry and classification system.

Title/Author	Approach	Definition	Applicability
The Interactive Digital Media Industry in the Greater Toronto Area (Greater Toronto Marketing Alliance/ City of Toronto, 2003)	Discusses the size and importance of the Interactive Digital Media (IDM) sector in the GTA.	The industry is made up of business establishments whose main activity consists of providing technology products and services to the media markets.	Good. The report provides a split between IDM focused firms (e.g. gaming firms) and IDM related firms (e.g. ISP or website development)
New Media Industries & North America Product Classification System 2007: A Submission to Statistics Canada for NAPCS 2007 (Trade Routes, Department of Canadian Heritage, 2005)	Redefine the NAPCS 2007 codes to include New Media,	"The creation, production, and delivery of interactive digital content for the purposes of informing, educating, and entertaining." Divides interactive design, interactive entertainment & e-learning into goods and services.	Good. The report provides a product-based definition of Interactive Industries.
International Trade Action Plan For the New Media Sector (Trade Team Canada – Cultural Goods and Services, Department of Canadian Heritage, 2005)	Find strategies to enhance novice/seasoned exporters' international market penetration in relation to "New Media".	1) Creation, production, and delivery of interactive digital content for purposes of entertaining/ educating/ informing; 2) A cultural sector based on interactive digital content (e.g. console games, edutainment, wireless content).	Good. The report uses the same definition as that used in the 2005 Trade Routes study on New Media Industries and NAPCS
New Media In BC Industry Survey (New Media BC, 2003)	Update the current state of activities, strengths, and limitations of BC new media.	Uses the CRTC definition (see Note 1). Further divided new media into Content Producers, Deliverers, Enablers and gave examples of all (see Note 2).	Good. The report provides a breakdown of the industry into creators, enablers, deliverers.

The Interactive Media Industry Explained (Jonathan Hirsch)	Attempt to define new media	Entities with at least one activity from each of five segments: Business, Content, Design, Technology, Sustainability; and, create products for information/commerce, entertainment, or learning that are deployed to one or more of the platforms shown (e.g. PCs, TV, DVDs, internet, etc.).	Good. The report recognizes the need to define interactive media and states there is substantial overlap with other sectors, and is "more of a discipline than an industry." Focuses more on content provision than most other reports.
National Game Map – Final Report (New Media BC, 2005)	Provide understanding about the game development sector in Canada	New media includes: digital games and entertainment, digital film/animation, e-learning, interactive design, mobile technology, and digital broadcasting. Divided the game market into content (developer), tools (software and hardware), and publishing.	Fair. The report defined new media based on what it includes (e.g. sub-industries). Divided gaming industry based on what is loosely equivalent to the creators, enablers, distributors.
White Paper: Integrated Strategy for British Columbia's Technology Clusters (PricewaterhouseCoopers, 2003)	Create stimulus to grow BC's technology clusters (Information & Communications, Wireless, New Media, Fuel Cells, Biotech)	No specific definition, but new media includes companies focused on: 1) electronic games 2) e-learning software, and 3) web-related services. Divides market by content providers, enablers (tools/resources to deliver) and deliverers (pipeline).	Fair. The report does not provide a precise definition but breaks the industry down by content providers (creators), enablers (tools to deliver), and deliverers (web hosts).
Report on The National Roundtables on Advanced Broadband Content (Delvinia, 2001)	Report on the state of broadband content development in Canada, and understand needs of stakeholders	Focus on "interactive content". Covers a wide range of content (from controlling a search engine to full multimedia content).	Fair. The report breaks down interactive content by packaging, production, and distribution (which is similar in spirit to providers, enablers, creators).
Digital Content Industry Roadmapping Study (Australian Interactive Media Industry Association, 2005)	Map the entities, assets, and connections forming the digital content industry in Australia	"Where arts, business, and technology converge." Industry includes visual effects and animation, interactive multimedia, software development, games, e-learning, and digital film and TV production.	Weak. The industry was broken down by sector. No precise definition was provided.

Employment in Canadian Screen-Based Media: A National Profile (Ekos Research Associates, 2004)	Provide insight into Canadian employment in the film and TV industries and examine the growing new media industry.	New media as a medium that embraces three elements: digital communication, interactivity, and interconnected networks.	Weak. The report used a very broad definition of the industry.
Ensuring the Sustainability of Online Cultural and Heritage Content: From an Economic Model to an Adapted Strategy (Multimedia World Watch, 2003)	To understand the Internet as a medium by finding the main factors that affect the value of projects on the web and to ensure that the online content of Canadian Heritage remains available.	Online digital cultural and heritage content: 1) All digitized collections of contextualized cultural works that are available online; 2) Original web-based artistic creations; 3) Projects relating to popularization, education, reference, entertainment, and promotion of culture and heritage.	Weak. The report stated that it “wished to avoid defining online culture too restrictively”. As a result the definition used was very broad.
Multimedia & Interactive Digital Content Industry (International Federation of Multimedia Associations, 2003)	Critique of classification of the multimedia and interactive digital content industry (MIDC) done by OECD, NAICS, NACE	No clear definition. Argued to shift the categorization of MIDC from the type of content delivered (start point) to focus on the end product of the digital content.	Weak. This report is a discussion document only. The report does not provide a classification system.
Interactive Media Industry In Manitoba (Manitoba Interactive Digital Media Association)	To provide info on the current status on the interactive media sector in Manitoba.	Interactive Media Industry not clearly defined but survey respondents are grouped into producers (e.g. software developers, designers), academic institutions and freelancers.	Weak. The report did not provide a clear definition, and grouped firms in a manner that was not consistent with other studies.
Canadian Framework for Culture Statistics (Statistics Canada, Culture Statistics Program, 2004)	To create a framework for culture statistics, and a definition of “culture” for statistical purposes to measure the social impact of culture.	Defined culture as: Creative artistic activity and the goods/services produced by it, and the preservation of human heritage. Defined culture goods/services as: 1) something that warrants IP rights; 2) services that present/ preserve/ produce/ transmit creative goods.	Fair. The report looks at culture in a broad sense. The report was not focused on the Interactive Media Industry.
Culture Goods Trade Estimates: Methodology and Technical Notes (Statistics Canada, 2004)	To provide a way of measuring the international trade that relates to culture goods	See above (Canadian Framework for Culture Statistics)	See above (Canadian Framework for Culture Statistics)

Winnipeg's Convergent Media Sector (Destination Winnipeg)	Sector profile on the convergent media sector in Winnipeg	No definition provided but listed sectors of convergent media. (New media includes: computer animation, visual effects, video games, web, CD and software development).	Weak. The report does not provide a definition of interactive industries, but it provides a breakdown of convergent media into NAICS codes.
Interactive Media Producers Survey 2002 (Delvinia Interactive Inc., 2003)	Goal was to report on the Interactive Media Industry and how it has changed from 2001/2000	No definition given. Used the Multimediator database along with additions from professional associations, survey partners.	Fair. The report surveyed companies and organizations included in the Multimediator database. The database appears heavily populated by web developers and may not be representative of the industry as a whole.
Toronto New Media Work Study (PricewaterhouseCoopers, 2000)	Provide insight into the new media industry in GTA; recommend how to reduce the barriers and energize growth	Used the CRTC definition (see Note 1). The new media market is made up of: 1) digital products for personal entertainment; 2) animation; 3) graphics; 4) interactive programs; and 5) e-learning.	Fair. The report uses the CRTC definition.
Interactive Digital Delivery Marketplace: An Overview of Canada's Multimedia Broadcasting Capabilities (National Research Council)	National Research Council commissioned the report to better position Canadian companies in the Interactive Media Industry	Divided interactive technology into five clusters: content tools, software, hardware, transmission, and display.	Fair. The report focused on companies engaged in interactive digital delivery. Did not include content creators such as web developers (unless they also had intellectual property content).
Webopedia definition of New Media.	n/a	New media: "generic term" of "electronic communication" through "computer technology." Includes: web sites, streaming audio/video, chat rooms, email, online communities, DVD media, VR environment, digital cameras, VOIP.	Weak.

Addendum:

Telefilm Canada operates the Canada New Media Fund. The fund provides assistance to small business entities that work in the New Media sector. The products defined as “eligible products” are:

- Interactive entertainment or educational products
 - ✦ Such as games, edutainment, cultural/arts-related products that are destined for the general public
 - ✦ Containing a variety of compelling multi-media digital content
 - ✦ Distributed in a digital format through:
 - » Off-line media (e.g. CD or DVD), internet, wireless network, interactive television broadcast, computer in a multi-media installation
 - ✦ Providing the user with an interactive, immersive experience occurring between the user and the software or other users (through software), which allows them to play, learn or be entertained.

Source: http://www.telefilm.gc.ca/upload/fonds_prog/cnmf-guidelines2005-2006.pdf

Note 1: CRTC Definition of New Media:

“Encompassing, singly or in combination, and whether interactive or not, services and products that make use of video, audio, graphics and alpha-numeric text, and involving, along with other more traditional means of distribution, digital delivery over networks interconnected on a local and global scale.”

Note 2: Definition of New Media Industries from New Media BC

Content producers	Enablers	Deliverers
Game development	Internet applications (e.g. Java)	Telecommunications
Animation	Software development	ISPs
Web design and development	Digital compression technologies	Web host
E-learning	Security software	
Visual Effects/Post-production	Technology consulting	
Digital content publishing	Ecommerce applications	
Streaming media		
Internet marketing		

APPENDIX C: NAICS CODE SUMMARY

5111 - Newspaper, Periodical, Book, and Directory Publishers

- » primarily engaged in publishing newspapers, periodicals, books, maps, directories, databases and other works, including those in electronic form

5112 – Software Publishers

- » primarily engaged in publishing computer software (packaged software)
- » can produce, design, help install and distribute computer software
- » can design and publish, or publish only

5121 - Motion Picture and Video Industries

- » primarily engaged in producing and/or distributing motion pictures, videos, TV programs or commercials; showing motion pictures or providing post-production and related services
- » divides industry into production, distribution, exhibition, other activities (e.g. creating credits, closed captioning, and producing computer graphics, animation and special effects – code 512190)

5122 – Sound Recording Industries

- » primarily engaged in producing and distributing music recordings, publishing music, or providing sound recording and related services
- » includes sound recording studios and other sound recording industries

5161 - Internet Publishing and Broadcasting

- » exclusively engaged in publishing/broadcasting content on the internet. The unique combination of text, audio, video, and interactive features present in informational or cultural products on the internet distinguishes it from more traditional publishers and broadcasters.
- » provide textual, audio, and/or video content of general or specific interest
- » do not provide traditional (non-internet) versions of the content that they publish or broadcast
- » examples include: Directory publishing, internet; internet book publishing; internet broadcasting; internet entertainment sites; internet game sites; internet newspaper publishing; internet software publishing.

5414 – Specialized Design Services

- » primarily engaged in providing specialized design services, except architectural, engineering and computer systems design
- » includes graphic design services and other specialized design services

5415 – Computer System Design and Related Services

- » primarily engaged in providing information technologies services
- » includes activities such as writing, modifying, testing and supporting software; creating web sites; planning and designing computer systems, and other professional and technical computer-related services.

5418 – Advertising and Related Services

- » primarily engaged in creating, placing, and implementing advertising and providing related services
- » includes activities such as creation and production of advertising material in media other than periodicals, newspapers, radio, and television

6117 – Educational Support Services

- » primarily engaged in providing non-instructional services that support educational processes, including curriculum development

7115 – Independent Artists, Writers and Performers

- » individuals primarily engaged in performing in artistic productions, creating artistic and cultural works or productions, or providing technical expertise necessary for these productions.
- » includes independent script writers, sketch artists, writers

Source: Statistics Canada, North American Industry Classification System (NAICS) 2002 - Canada

APPENDIX D: SURVEY RESULTS - BRITISH COLUMBIA

The following tables present the survey results for the set of respondents located in British Columbia. There were 77 small, medium, and large sized firms who responded to the survey from British Columbia. Results for Very Large and Exceptionally Large firms are not reported for confidentiality reasons due to low response rates.

REVENUE

Average Gross Revenue

Table 49. Average Gross Revenue by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	\$80,000	\$592,105	\$4,384,615	\$1,232,456
Enabler	\$100,000	\$562,500	\$3,000,000	\$882,813

Notes:

- 1) Small Firms: 25 Content Creators and 10 Enablers have Gross Revenue less than \$250,000.
- 2) Medium: 19 Content Creators and 2 Enablers have Gross Revenue between \$250,000 and \$1 million.
- 3) Large: 13 Content Creators and 4 Enablers have Gross Revenue between \$1 million and \$10 million.
- 4) There are 4 Very Large firms (Gross Revenue over \$10 million) that are not included in this analysis.

Table 50. Average Gross Revenue by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Average Gross Revenue
Content Creator	Interactive Entertainment	\$1,190,385
	E-learning and Education	\$613,636
	Information and Reference	\$1,023,438
	Social, Culture and Arts	\$829,167
	Animation	\$2,859,375
	Other	\$1,266,667
Content Creator Overall		\$1,232,456
Enabler	Software Development	\$1,170,833
	Internet Application	\$992,857
	Other Enablers	\$50,000
Enabler Overall		\$882,813
Overall		\$1,155,822

Notes:

- 1) Excludes Firms with Gross Revenue over \$10 million.
- 2) There are 57 Content Creators; 13 Interactive Entertainment, 11 E-learning and Education, 16 Information and Reference, 6 Social, Culture and Arts, 8 Animation, 3 Other.
- 3) There are 16 Enablers; 6 Software Development, 7 Internet Application, 3 Other Enablers.

Average Revenue from Interactive Media

Table 51. Average Revenue from Interactive Media by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	\$56,380	\$410,526	\$2,697,692	\$776,833
Enabler	\$92,250	\$562,500	\$2,137,500	\$662,344

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 52. Average Revenue from Interactive Media by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Average Revenue from Interactive Media
Content Creator	Interactive Entertainment	\$1,186,923
	E-learning and Education	\$480,227
	Information and Reference	\$378,125
	Social, Culture and Arts	\$766,667
	Animation	\$1,139,625
	Other	\$1,266,667
Content Creator Overall		\$776,833
Enabler	Software Development	\$1,020,833
	Internet Application	\$618,214
	Other Enablers	\$48,333
Enabler Overall		\$662,344
Overall Average Revenue from Interactive Media		\$751,740

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 53. Percentage of Gross Revenue from Interactive Media by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Percentage of Gross Revenue from Interactive Media
Content Creator	Interactive Entertainment	99.7%
	E-learning and Education	78.3%
	Information and Reference	36.6%
	Social, Culture and Arts	92.5%
	Animation	39.9%
	Other	100.0%
Content Creator Overall		63.0%
Enabler	Software Development	87.2%
	Internet Application	62.3 %
	Other Enablers	96.7%
Enabler Overall		75.0%
Overall Percentage of Gross Revenue from Interactive Media		65.0%

Note: Excludes Firms with Gross Revenue over \$10 million.

Percentage of Interactive Media Revenue from Fee-for-Service Activities

Table 54. Percentage of Interactive Media Revenue from Fee-for-Service Activities by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	54.0%	71.2%	63.3%	64.4%
Enabler	46.9%	40.0%	78.2%	71.4%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 55. Percentage Breakdown of Interactive Media Revenue from Fee-for-Service Activities and Intellectual Property Development by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Interactive Media Revenue from Fee-for-Service Activities	Interactive Media Revenue from Intellectual Property Development
Content Creator	Interactive Entertainment	75.3%	24.7%
	E-learning and Education	45.0%	55.0%
	Information and Reference	84.7%	15.3%
	Social, Culture and Arts	79.2%	20.8%
	Animation	55.7%	44.3%
	Other	17.8%	82.2%
Content Creator Overall		64.4%	35.6%
Enabler	Software Development	60.9%	39.1%
	Internet Application	86.2%	13.8%
	Other Enablers	71.6%	28.5%
Enabler Overall		71.4%	28.6%
Overall Interactive Media Revenue		65.7%	34.3%

Note: Excludes Firms with Gross Revenue over \$10 million.

Percentage of Interactive Media Revenue from Intellectual Property Development Activities

Table 56. Percentage of Interactive Media Revenue from Intellectual Property Development Activities by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	46.0%	28.8%	36.7%	35.6%
Enabler	53.2%	60.0%	21.8%	28.6%

Note: Excludes Firms with Gross Revenue over \$10 million.

BUSINESS PERFORMANCE

Business Performance Compared to Last Year

Table 57. Business Performance Compared to Last Year by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Size	Much Better	Better	Same	Worse	Much Worse
Content Creator	Small	40.0%	20.0%	28.0%	4.0%	8.0%
	Medium	57.9%	5.3%	31.6%	5.3%	0.0%
	Large	38.5%	46.2%	15.4%	0.0%	0.0%
Content Creator Overall		45.6%	21.1%	26.3%	3.5%	3.5%
Enabler	Small	10.0%	60.0%	20.0%	10.0%	0.0%
	Medium	0.0%	50.0%	50.0%	0.0%	0.0%
	Large	25.0%	50.0%	25.0%	0.0%	0.0%
Enabler Overall		12.5%	56.3%	25.0%	6.3%	0.0%
Overall Business Performance Compared to Last Year		38.4%	28.8%	26.0%	4.1%	2.7%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 58. Business Performance Compared to Last Year by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Much Better	Better	Same	Worse	Much Worse
Content Creator	Interactive Entertainment	38.5%	30.8%	15.4%	7.7%	7.7%
	E-learning and Education	63.6%	9.1%	27.3%	0.0%	0.0%
	Information and Reference	50.0%	18.8%	31.3%	0.0%	0.0%
	Social, Culture and Arts	33.3%	16.7%	33.3%	0.0%	16.7%
	Animation	50.0%	12.5%	37.5%	0.0%	0.0%
	Other	0.0%	66.7%	0.0%	33.3%	0.0%
Content Creator Overall		45.6%	21.1%	26.3%	3.5%	3.5%
Enabler	Software Development	0.0%	66.7%	33.3%	0.0%	0.0%
	Internet Application	28.6%	57.1%	14.3%	0.0%	0.0%
	Other Enablers	0.0%	33.3%	33.3%	33.3%	0.0%
Enabler Overall		12.5%	56.3%	25.0%	6.3%	0.0%
Overall Business Performance Compared to Last Year		38.4%	28.8%	26.0%	4.1%	2.7%

Note: Excludes Firms with Gross Revenue over \$10 million.

EMPLOYMENT

Average Interactive Media Employment

Table 59. Average Interactive Media Employment by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Size	Full Time	Part Time	Subcontractor	Overall
Content Creator	Small	1.2	0.6	2.6	4.3
	Medium	4.8	1.0	3.4	9.2
	Large	21.3	3.9	5.1	30.3
Content Creator Overall		7.0	1.5	3.4	11.9
Enabler	Small	2.4	0.5	2.2	5.1
	Medium	15.0	2.0	4.0	21.0
	Large	9.3	1.0	1.9	12.2
Enabler Overall		5.7	0.8	2.3	8.8
Overall Average Interactive Media Employment		6.7	1.3	3.2	11.2

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 60. Average Interactive Media Employment by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Full Time	Part Time	Subcontractor	Overall
Content Creator	Interactive Entertainment	11.7	2.0	2.6	16.3
	E-learning and Education	4.1	2.3	4.9	11.2
	Information and Reference	3.3	0.7	1.9	5.9
	Social, Culture and Arts	1.7	0.1	3.5	5.3
	Animation	14.5	1.1	2.0	17.7
	Other	7.3	4.0	13.3	24.7
Content Creator Overall		7.0	1.5	3.4	11.9
Enabler	Software Development	9.6	0.7	2.2	12.5
	Internet Application	4.4	1.3	2.4	8.1
	Other Enablers	1.0	0.0	2.2	3.2
Enabler Overall		5.7	0.8	2.3	8.8
Overall Average Interactive Media Employment		6.7	1.3	3.2	11.2

Note: Excludes Firms with Gross Revenue over \$10 million.

PROJECT TYPE

Sales Channel for Interactive Media Products and Services

Table 61. Sales Channel by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Size	Direct Sales	Licensing	Distributor	Publisher	Other
Content Creator	Small	72.0%	4.0%	4.0%	8.0%	12.0%
	Medium	84.2%	10.5%	0.0%	5.3%	0.0%
	Large	46.2%	0.0%	15.4%	23.1%	15.4%
Content Creator Overall		70.2%	5.3%	5.3%	10.5%	8.8%
Enabler	Small	60.0%	30.0%	10.0%	0.0%	0.0%
	Medium	0.0%	0.0%	0.0%	50.0%	50.0%
	Large	50.0%	25.0%	25.0%	0.0%	0.0%
Enabler Overall		50.0%	25.0%	12.5%	6.3%	6.3%
Overall Sales Channel		65.8%	9.6%	6.9%	9.6%	8.2%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 62. Sales Channel by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Direct Sales	Licensing	Distributor	Publisher	Other
Content Creator	Interactive Entertainment	38.5%	7.7%	7.7%	46.2%	0.0%
	E-learning and Education	90.9%	0.0%	0.0%	0.0%	9.1%
	Information and Reference	87.5%	0.0%	0.0%	0.0%	12.5%
	Social, Culture and Arts	66.7%	16.7%	0.0%	0.0%	16.7%
	Animation	75.0%	0.0%	12.5%	0.0%	12.5%
	Other	33.3%	33.3%	33.3%	0.0%	0.0%
Content Creator Overall		70.2%	5.3%	5.3%	10.5%	8.8%
Enabler	Software Development	16.7%	50.0%	16.7%	16.7%	0.0%
	Internet Application	71.4%	14.3%	0.0%	0.0%	14.3%
	Other Enablers	66.7%	0.0%	33.3%	0.0%	0.0%
Enabler Overall		50.0%	25.0%	12.5%	6.3%	6.3%
Overall Sales Channel		65.8%	9.6%	6.9%	9.6%	8.2%

Note: Excludes Firms with Gross Revenue over \$10 million.

EXPORTS

Percentage of Firms that Export

Table 63. Percentage of Firms that Export by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Size	Percentage of Firms that Export	Average Percentage of Business for Export
Content Creator	Small	56.0%	55.4%
	Medium	63.2%	30.0%
	Large	84.6%	69.1%
Content Creator Overall		64.9%	51.2%
Enabler	Small	70.0%	35.6%
	Medium	50.0%	75.0%
	Large	75.0%	23.3%
Enabler Overall		68.8%	35.8%
Overall		65.8%	47.7%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 64. Percentage of Firms that Export by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Percentage of Firms that Export	Average Percentage of Business for Export
Content Creator	Interactive Entertainment	76.9%	72.0%
	E-learning and Education	54.6%	45.8%
	Information and Reference	62.5%	34.5%
	Social, Culture and Arts	50.0%	31.7%
	Animation	75.0%	59.2%
	Other	66.7%	52.5%
Content Creator Overall		64.9%	51.2%
Enabler	Software Development	66.7%	57.3%
	Internet Application	71.4%	25.0%
	Other Enablers	66.7%	20.0%
Enabler Overall		68.8%	35.8%
Overall		65.8%	47.7%

Note: Excludes Firms with Gross Revenue over \$10 million.

Sales Channel for Exports

Table 65. Sales Channels for Exports by Primary Activity Group and Firm Size – British Columbia

Primary Activity Group	Size	Direct Sales	Through Agent	Both
Content Creator	Small	71.4%	14.3%	14.3%
	Medium	66.7%	25.0%	8.3%
	Large	81.8%	0.0%	18.2%
Content Creator Overall		73.0%	13.5%	13.5%
Enabler	Small	85.7%	14.3%	0.0%
	Medium	0.0%	0.0%	100.0%
	Large	66.7%	0.0%	33.3%
Enabler Overall		72.7%	9.1%	18.2%
Overall Sales Channels		72.9%	12.5%	14.6%

Notes:

- 1) Excludes Firms with Gross Revenue over \$10 million.
- 2) Small Firms: 14 Content Creators and 7 Enablers have Gross Revenue less than \$250,000.
- 3) Medium: 12 Content Creators and 1 Enablers have Gross Revenue between \$250,000 and \$1 million.
- 4) Large: 11 Content Creators and 3 Enablers have Gross Revenue between \$1 million and \$10 million.

Table 66. Sales Channels for Exports by Primary Task Category – British Columbia

Primary Activity Group	Primary Task Category	Direct Sales	Through Agent	Both
Content Creator	Interactive Entertainment	70.0%	30.0%	0.0%
	E-learning and Education	33.3%	33.3%	33.3%
	Information and Reference	100.0%	0.0%	0.0%
	Social, Culture and Arts	100.0%	0.0%	0.0%
	Animation	50.0%	0.0%	50.0%
	Other	100.0%	0.0%	0.0%
Content Creator Overall		73.0%	13.5%	13.5%
Enabler	Software Development	50.0%	14.3%	50.0%
	Internet Application	100.0%	0.0%	0.0%
	Other Enablers	50.0%	0.0%	0.0%
Enabler Overall		72.7%	9.1%	18.2%
Overall		72.9%	12.5%	14.6%

Notes:

- 1) Excludes Firms with Gross Revenue over \$10 million.
- 2) There are 37 Content Creators; 10 Interactive Entertainment, 6 E-learning and Education, 10 Information and Reference, 3 Social, Culture and Arts, 6 Animation, 2 Other.
- 3) There are 11 Enablers; 4 Software Development, 5 Internet Application, 2 Other Enablers.

SOURCES OF FUNDING AND FINANCING

Funding Sources for Fee-for-Service Activities

Table 67. Ranking of Funding Sources for Fee-for-Service Activities – British Columbia

Funding Source for Fee-for-Service Activities	Content Creator	Enabler
Bank Financing	1	1
Provincial Tax Credit	3	2
SRED	2	1
Provincial Funding Program	5	-
IRAP	6	-
Other	4	-

Notes:

- 1) Excludes firms with Gross Revenue over \$10 million.
- 2) Funding sources are ranked in descending order. For example, Bank Financing is accessed by the greatest number of respondents for both Content Creators and Enablers.

Funding Sources for Intellectual Property Development Activities

Table 68. Ranking of Funding Sources for Intellectual Property Development Activities – British Columbia

Funding Source for Intellectual Property Development Activities	Content Creator	Enabler
Cash Flow	1	1
Telefilm	2	4
Friends & Family	2	4
Provincial Tax Credit	5	-
Provincial Funding Program	5	-
Bank Financing	3	2
Bell Broadcast & New Media Fund	8	-
SRED	4	3
Angel Investment	6	4
Banff New Media	8	-
IRAP	8	-
New Media Research Network	7	-
Virtual Museum of Canada	9	-
Other	5	-

Notes:

- 1) Excludes firms with Gross Revenue over \$10 million.
- 2) Funding sources are ranked in descending order.

APPENDIX E: SURVEY RESULTS - ONTARIO

The following tables present the survey results for the set of respondents located in Ontario. There were 65 small, medium, and large sized firms who responded to the survey from Ontario. Results for Very Large and Exceptionally Large firms are not reported for confidentiality reasons due to low response rates.

REVENUE

Average Gross Revenue

Table 69. Average Gross Revenue by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	\$87,500	\$575,000	\$3,562,500	\$750,000
Enabler	\$81,250	\$500,000	\$3,000,000	\$429,167

Notes:

- 1) Small Firms: 30 Content Creators and 8 Enablers have Gross Revenue less than \$250,000.
- 2) Medium: 15 Content Creators and 3 Enablers have Gross Revenue between \$250,000 and \$1 million.
- 3) Large: 8 Content Creators and 1 Enablers have Gross Revenue between \$1 million and \$10 million.
- 4) There are 4 Very Large firms (with Gross Revenue over \$10 million) that are not included in this analysis.

Table 70. Average Gross Revenue by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Average Gross Revenue
Content Creator	Interactive Entertainment	\$1,630,357
	E-learning and Education	\$225,000
	Information and Reference	\$619,444
	Social, Culture and Arts	\$81,250
	Animation	\$562,500
	Other	\$91,667
Content Creator Overall		\$750,000
Enabler	Software Development	\$541,667
	Internet Application	\$305,000
	Other Enablers	\$375,000
Enabler Overall		\$429,167
Overall Average Gross Revenue		\$690,769

Notes:

- 1) Excludes Firms with Gross Revenue over \$10 million.
- 2) There are 53 Content Creators; 14 Interactive Entertainment, 8 E-learning and Education, 18 Information and Reference, 4 Social, Culture and Arts, 6 Animation, 3 Other.
- 3) There are 12 Enabler; 6 Software Development, 5 Internet Application, 1 Other Enablers.

Average Gross Revenue

Table 71. Average Revenue from Interactive Media by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	\$69,325	\$362,500	\$3,056,250	\$603,156
Enabler	\$65,688	\$462,500	\$3,000,000	\$409,417

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 72. Average Revenue from Interactive Media by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Average Revenue from Interactive Media
Content Creator	Interactive Entertainment	\$1,479,554
	E-learning and Education	\$135,938
	Information and Reference	\$522,278
	Social, Culture and Arts	\$55,625
	Animation	\$66,250
	Other	\$48,333
Content Creator Overall		\$603,156
Enabler	Software Development	\$526,750
	Internet Application	\$283,000
	Other Enablers	\$337,500
Enabler Overall		\$409,417
Overall Average Revenue from Interactive Media		\$567,388

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 73. Percentage of Gross Revenue from Interactive Media by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	79.2%	63.0%	85.8%	80.4%
Enabler	80.9%	92.5%	100.0%	95.4%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 74. Percentage of Gross Revenue from Interactive Media by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Percentage of Gross Revenue from Interactive Media
Content Creator	Interactive Entertainment	90.8%
	E-learning and Education	60.4%
	Information and Reference	84.3%
	Social, Culture and Arts	68.5%
	Animation	11.8%
	Other	52.7%
Content Creator Overall		80.4%
Enabler	Software Development	97.3%
	Internet Application	92.8 %
	Other Enablers	90.0%
Enabler Overall		95.4%
Overall Average Revenue from Interactive Media		82.1%

Note: Excludes Firms with Gross Revenue over \$10 million.

Percentage of Interactive Media Revenue from Fee-for-Service Activities

Table 75. Percentage of Interactive Media Revenue from Fee-for-Service Activities by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	68.0%	44.9%	52.2%	52.0%
Enabler	55.9%	66.2%	15.0%	33.8%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 76. Percentage Breakdown of Interactive Media Revenue from Fee-for-Service Activities and Intellectual Property Development by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Interactive Media Revenue from Fee-for-Service Activities	Interactive Media Revenue from Intellectual Property Development
Content Creator	Interactive Entertainment	38.1%	61.9%
	E-learning and Education	37.8%	62.2%
	Information and Reference	82.9%	17.1%
	Social, Culture and Arts	67.0%	33.0%
	Animation	71.8%	28.2%
	Other	67.2%	32.8%
Content Creator Overall		52.0%	48.0%
Enabler	Software Development	17.4%	82.6%
	Internet Application	66.7%	33.3%
	Other Enablers	50.0%	50.0%
Enabler Overall		33.8%	66.2%
Overall Interactive Media Revenue		49.9%	50.4%

Note: Excludes Firms with Gross Revenue over \$10 million.

Percentage of Interactive Media Revenue from Intellectual Property Development Activities

Table 77. Percentage of Interactive Media Revenue from Intellectual Property Development Activities by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Small	Medium	Large	Overall Average
Content Creator	32.0%	55.1%	47.8%	48.0%
Enabler	44.1%	33.8%	85.0%	66.2%

Note: Excludes Firms with Gross Revenue over \$10 million.

BUSINESS PERFORMANCE

Business Performance Compared to Last Year

Table 78. Business Performance Compared to Last Year by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Size	Much Better	Better	Same	Worse	Much Worse
Content Creator	Small	10.3%	41.4%	20.7%	10.3%	17.2%
	Medium	20.0%	60.0%	13.3%	6.7%	0.0%
	Large	37.5%	50.0%	12.5%	0.0%	0.0%
Content Creator Overall		17.3%	48.1%	17.3%	7.7%	9.6%
Enabler	Small	25.0%	37.5%	37.5%	0.0%	0.0%
	Medium	0.0%	66.7%	33.3%	0.0%	0.0%
	Large	100.0%	0.0%	0.0%	0.0%	0.0%
Enabler Overall		25.0%	41.7%	33.3%	0.0%	0.0%
Overall Business Performance Compared to Last Year		18.8%	46.9%	20.3%	6.3%	7.8%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 79. Business Performance Compared to Last Year by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Much Better	Better	Same	Worse	Much Worse
Content Creator	Interactive Entertainment	38.5%	46.2%	7.7%	7.7%	0.0%
	E-learning and Education	12.5%	75.0%	12.5%	0.0%	0.0%
	Information and Reference	16.7%	44.4%	22.2%	5.6%	11.1%
	Social, Culture and Arts	0.0%	25.0%	25.0%	50.0%	0.0%
	Animation	0.0%	33.3%	33.3%	0.0%	33.3%
	Other	0.0%	66.7%	0.0%	0.0%	33.3%
Content Creator Overall		17.3%	48.1%	17.3%	7.7%	9.6%
Enabler	Software Development	33.3%	33.3%	33.3%	0.0%	0.0%
	Internet Application	20.0%	40.0%	40.0%	0.0%	0.0%
	Other Enablers	0.0%	100.0%	0.0%	0.0%	0.0%
Enabler Overall		25.0%	41.7%	33.3%	0.0%	0.0%
Overall Business Performance Compared to Last Year		18.8%	46.9%	20.3%	6.3%	2.74%

Note: Excludes Firms with Gross Revenue over \$10 million.

EMPLOYMENT

Average Interactive Media Employment

Table 80. Average Interactive Media Employment by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Size	Full Time	Part Time	Subcontractor	Overall
Content Creator	Small	1.6	0.4	2.9	4.8
	Medium	4.6	2.1	4.3	11.0
	Large	28.1	3.1	3.6	34.8
Content Creator Overall		6.4	1.3	3.4	11.1
Enabler	Small	0.6	0.1	1.7	2.4
	Medium	7.0	3.0	7.3	17.3
	Large	55.0	5.0	4.0	64.0
Enabler Overall		6.7	1.2	3.3	11.3
Overall Average Interactive Media Employment		6.5	1.3	3.4	11.1

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 81. Average Interactive Media Employment by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Full Time	Part Time	Subcontractor	Overall
Content Creator	Interactive Entertainment	18.5	1.9	3.9	24.3
	E-learning and Education	1.7	0.7	3.8	6.3
	Information and Reference	3.6	1.9	4.0	9.5
	Social, Culture and Arts	0.2	0.0	1.6	1.8
	Animation	0.3	0.2	1.8	2.4
	Other	0.3	0.0	1.3	1.6
Content Creator Overall		6.4	1.3	3.4	11.1
Enabler	Software Development	9.5	1.0	1.5	12.0
	Internet Application	2.9	0.9	4.4	8.2
	Other Enablers	9.0	4.5	9.0	22.5
Enabler Overall		6.7	1.2	3.3	11.3
Overall Average Interactive Media Employment		6.5	1.3	3.4	11.1

Note: Excludes Firms with Gross Revenue over \$10 million.

PROJECT TYPE

Sales Channel for Interactive Media Products and Services

Table 82. Sales Channel by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Size	Direct Sales	Licensing	Distributor	Publisher	Other
Content Creator	Small	46.7%	20.0%	6.7%	20.0%	6.7%
	Medium	66.7%	6.7%	6.7%	6.7%	13.3%
	Large	50.0%	12.5%	0.0%	37.5%	0.0%
Content Creator Overall		52.8%	15.1%	5.7%	18.9%	7.6%
Enabler	Small	75.0%	12.5%	12.5%	0.0%	0.0%
	Medium	66.7%	33.3%	0.0%	0.0%	0.0%
	Large	0.0%	0.0%	0.0%	0.0%	100.0%
Enabler Overall		66.7%	16.7%	8.3%	0.0%	8.3%
Overall Sales Channel		55.4%	15.4%	6.2%	15.4%	7.7%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 83. Sales Channel by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Direct Sales	Licensing	Distributor	Publisher	Other
Content Creator	Interactive Entertainment	35.7%	14.3%	0.0%	35.7%	14.3%
	E-learning and Education	35.7%	25.0%	12.5%	12.5%	12.5%
	Information and Reference	77.8%	5.6%	0.0%	11.1%	5.6%
	Social, Culture and Arts	50.0%	25.0%	0.0%	25.0%	0.0%
	Animation	66.7%	0.0%	33.3%	0.0%	0.0%
	Other	0.0%	66.7%	0.0%	33.3%	0.0%
Content Creator Overall		52.8%	15.1%	5.7%	18.9%	7.6%
Enabler	Software Development	50.0%	16.7%	16.7%	0.0%	16.7%
	Internet Application	100.0%	0.0%	0.0%	0.0%	0.0%
	Other Enablers	0.0%	100.0%	0.0%	0.0%	0.0%
Enabler Overall		66.7%	16.7%	8.3%	0.0%	8.3%
Overall Sales Channel		55.4%	15.4%	6.2%	15.4%	7.7%

Note: Excludes Firms with Gross Revenue over \$10 million.

EXPORTS

Percentage of Firms that Export

Table 84. Percentage of Firms that Export by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Size	Percentage of Firms that Export	Average Percentage of Business for Export
Content Creator	Small	43.3%	64.9%
	Medium	60.0%	34.4%
	Large	87.5%	80.7%
Content Creator Overall		54.7%	59.3%
Enabler	Small	75.0%	40.8%
	Medium	33.3%	25.0%
	Large	100.0%	30.0%
Enabler Overall		67.7%	37.5%
Overall		56.9%	54.6%

Note: Excludes Firms with Gross Revenue over \$10 million.

Table 85. Percentage of Firms that Export by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Percentage of Firms that Export	Average Percentage of Business for Export
Content Creator	Interactive Entertainment	100.0%	72.8%
	E-learning and Education	50.0%	61.3%
	Information and Reference	44.4%	33.1%
	Social, Culture and Arts	25.0%	100.0%
	Animation	16.7%	50.0%
	Other	33.3%	40.0%
Content Creator Overall		54.7%	59.28%
Enabler	Software Development	83.3%	47.0%
	Internet Application	40.0%	20.0%
	Other Enablers	100.0%	25.0%
Enabler Overall		66.7%	37.5%
Overall		56.9%	54.6%

Note: Excludes Firms with Gross Revenue over \$10 million.

Sales Channel for Exports

Table 86. Sales Channels for Exports by Primary Activity Group and Firm Size - Ontario

Primary Activity Group	Size	Direct Sales	Through Agent	Both
Content Creator	Small	38.5%	7.7%	53.9%
	Medium	66.7%	22.2%	11.1%
	Large	42.9%	42.9%	14.3%
Content Creator Overall		48.3%	20.7%	31.0%
Enabler	Small	83.3%	16.7%	0.0%
	Medium	0.0%	100.0%	0.0%
	Large	100.0%	0.0%	0.0%
Enabler Overall		75.0%	25.0%	0.0%
Overall Sales Channels		54.1%	21.6%	24.3%

Notes:

- 1) Excludes Firms with Gross Revenue over \$10 million.
- 2) Small Firms: 13 Content Creators and 6 Enablers have Gross Revenue less than \$250,000.
- 3) Medium: 9 Content Creators and 1 Enablers have Gross Revenue between \$250,000 and \$1 million.
- 4) Large: 7 Content Creators and 1 Enablers have Gross Revenue between \$1 million and \$10 million.

Table 87. Sales Channels for Exports by Primary Task Category - Ontario

Primary Activity Group	Primary Task Category	Direct Sales	Through Agent	Both
Content Creator	Interactive Entertainment	28.6%	35.7%	35.7%
	E-learning and Education	25.0%	0.0%	75.0%
	Information and Reference	100.0%	0.0%	0.0%
	Social, Culture and Arts	0.0%	0.0%	100.0%
	Animation	0.0%	100.0%	0.0%
	Other	100.0%	0.0%	0.0%
Content Creator Overall		48.3%	20.7%	31.0%
Enabler	Software Development	80.0%	20.0%	0.0%
	Internet Application	100.0%	0.0%	0.0%
	Other Enablers	0.0%	100.0%	0.0%
Enabler Overall		75.0%	25.0%	0.0%
Overall		54.1%	21.6%	24.3%

Notes:

- 1) Excludes Firms with Gross Revenue over \$10 million.
- 2) There are 29 Content Creators; 14 Interactive Entertainment, 4 E-learning and Education, 8 Information and Reference, 1 Social, Culture and Arts, 1 Animation, 1 Other.
- 3) There are 8 Enablers; 5 Software Development, 2 Internet Application, 1 Other Enablers.

SOURCES OF FUNDING AND FINANCING

Funding Sources for Fee-for-Service Activities

Table 88. Ranking of Funding Sources for Fee-for-Service Activities - Ontario

Funding Source for Fee-for-Service Activities	Content Creator	Enabler
Bank Financing	1	1
Provincial Tax Credit	2	-
SRED	3	-
Provincial Funding Program	4	1
IRAP	-	-
Other	2	1

Notes:

- 1) Excludes firms with Gross Revenue over \$10 million.
- 2) Funding sources are ranked in descending order. For example, Bank Financing is accessed by the greatest number of respondents for both Content Creators and Enablers.

Funding Sources for Intellectual Property Development Activities

Table 89. Ranking of Funding Sources for Intellectual Property Development Activities - Ontario

Funding Source for Intellectual Property Development Activities	Content Creator	Enabler
Cash Flow	1	1
Telefilm	4	3
Friends & Family	2	2
Provincial Tax Credit	3	2
Provincial Funding Program	5	-
Bank Financing	7	2
Bell Broadcast & New Media Fund	3	2
SRED	6	2
Angel Investment	8	2
Banff New Media	-	-
IRAP	9	-
New Media Research Network	10	-
Virtual Museum of Canada	10	-
Other	3	3

Notes:

- 1) Excludes firms with Gross Revenue over \$10 million.
- 2) Funding sources are ranked in descending order. For example, Cash Flow is accessed by the greatest number of respondents for both Content Creators and Enablers.

APPENDIX F: REFERENCES

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