

Getting Real 7

Documentary Organization of Canada

September 2023



DOCUMENTARY ORGANIZATION OF CANADA
DOCUMENTARISTES DU CANADA

AI generated images of "documentary filmmaker"
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Disclaimer

The Documentary Organization of Canada (DOC) acknowledges the support of the following funders in the research and writing of this report: the Bell Fund, Telefilm Canada, the Canadian Media Producers Association (CMPA), and the Association Québécoise de la Production Médiatique (AQPM). The authors of this report wish to thank everyone who agreed to be interviewed for their generous participation in this project. Any opinions, findings,

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Executive Summary

The Documentary Organization of Canada (DOC) - with support from the Bell Fund, Telefilm Canada, the CMPA, AQPM, and Ontario Creates- commissioned Nordicity to develop the seventh edition of “Getting Real”. In this twentieth anniversary edition of these cornerstone industry reports, “Getting Real 7” looks at the economic impact of documentary production from 2016-2017 to 2020-2021, as well as trends in production, budgets and financing, and audiences. In addition to the economic profile of the industry, the report considers the experiences of documentary filmmakers, and the challenges the industry and community face.

The study was developed using a mixed-methods approach including a literature review, analysis of industry data, a survey, and stakeholder interviews. Industry data was first acquired from the Canadian Audio-Visual Certification Office (CAVCO) to form the foundation of the statistical and financial analysis of the documentary sector, and where possible (and applicable), drew on data from funding bodies such as Telefilm Canada (Telefilm), the Canada Media Fund (CMF), and the National Film Board (NFB).



Economic Impact of Documentary Production

The Canadian independent documentary production sector is a strong contributor to the Canadian economy, with almost \$1.3 billion in production volume in the five years between the 2016/17 fiscal year and the 2020/21 fiscal year. Despite an overall industry decline in production volume in 2020/21 because of the COVID-19 pandemic, the documentary genre grew and continued to do so in 2021/22 with an increase of 53.2%, the largest increase on a percentage basis across all genres.

The independent documentary production sector in Canada contributed \$421 million to the Gross Domestic Product in 2020/21 based on \$335 million in direct production spending and through approximately 5,600 direct and spin-off jobs.

Overall documentary production grew approximately 32% between 2016/17 and 2020/21, whilst the number of hours of production increased by almost 37% during this period. The number of projects being made during this period fell slightly by around 4%. International financing of Canadian independent documentaries also increased overall, from \$44.4 million to \$76.1 million. These trends were driven by documentary series, that consistently made up most of the Canadian documentary sector during the five-year period studied in this report. In contrast, single-episode/one-off and feature-length (film or TV) documentaries experienced a relatively steady overall decline between 2016/17 and 2020/21. These trends were seen across the English-language and French-language markets.

Documentary Production Budgets

Average per-hour production budgets for English-language documentaries fluctuated between 2016/17 and 2020/21. In three out of the five years, single-episode/one-off documentaries had the highest budgets per hour of all English-language formats in different years. In 2020/21, the average per-hour production budget for single-episode/one-off documentaries was \$376,353, followed by feature-length (film or TV) with an average of \$350,556. Documentary series had significantly lower per-hour budgets, at only \$289,115 in 2020/21.

Between 2016/17 and 2020/21, feature-length projects had the highest budgets per hour of all French-language formats with an average of \$398,485 in 2020/21. This was followed by single-episode/one-off documentaries, with an average of \$231,259. Similar to English-language productions, documentary series had the lowest average per-hour budgets ranging from a low of \$141,307 in 2019/20 to a high of \$153,892 in 2020/21.

Financing of Documentary Production

Data from CAVCO suggests that between 2016/17 and 2020/21 the largest share of financing came from provincial tax credits (\$196.1 million), followed by the Canada Media Fund (\$169.4 million), Canadian distributors (\$148.2 million), and foreign sources (\$143.5 million).

In 2020/21, provincial tax credits made up almost 20% of total financing, increasing from just under 15% in 2016/17. Foreign sources also saw an increase in its share of total financing, more than doubling from 7% to almost 16%. While the amount of financing from Canadian distributors, private and public Canadian broadcasters, federal tax credits, and production companies increased between 2016/17 and 2020/21, their share of total financing dropped over the five-year period.

Similarly, although the Canada Media Fund continues to provide consistent financing to the industry (approximately \$35 million annually), its share of total financing also dropped from approximately 17% to 13% between 2016/17 and 2020/21.

Despite fluctuations in financing between 2016/17 and 2017/18, the overall financing for all formats of French-language documentary production has increased from \$76.2 million to \$101 million. Notably, there is considerably less (or close to no) funding from foreign sources and Canadian distributors for French-language documentary productions. Because broadcasters typically want French-language documentary productions to remain highly localized, it is challenging for them to sell their content internationally.

Audiences for Canadian Documentaries

Viewership of Canadian documentaries spiked during the COVID-19 lockdowns, both within Canada and internationally. Viewers became more interested in true crime content, productions that were escapist in nature, and projects engaging with social issues.

Both English-language and French-language Canadian documentary television productions reached peak average weekly viewing hours in 2020, but declines in 2021 were minimal, suggesting that this trend will continue. Approximately half of English-language television documentary viewing hours are attributable to Canadian documentaries (as opposed to

foreign documentaries), though this percentage is in slight decline, particularly during peak period viewing hours. In contrast, the French-language television documentary market is much more heavily dominated by Canadian productions, with over three-quarters of viewing time, and no noticeable downward trend.

Canadian documentaries fared well at the Canadian box office in 2022, despite strong international competition. Canadian French-language documentaries or multilingual documentaries were noticeably more successful than English-only documentaries. 2022 was also a more successful year than 2021, hopefully indicating an upward trend.

Key Trends, Challenges and Opportunities

The survey and stakeholder interviews provided further context for the data gathered above. The qualitative analysis revealed that documentary filmmakers continue to face many challenges, with the most critical challenges relating to funding. Specifically, survey participants selected accessing funding to create their films, navigating the bureaucracy of mainstream public funding systems, and accessing funding in marketing and promoting their films as the top 3 barriers they face as documentary creators.

Filmmakers and stakeholders also noted that the rise of streaming platforms has caused changes to distribution and how they reach their audiences. Although streaming has allowed creators to connect with larger and targeted audiences, it has also created a very competitive and crowded environment. Filmmakers employ a host of methods in finding

audiences for their films, including hiring a publicist, adopting an online promotion strategy, and hiring an impact producer.

Despite the growing emphasis on diversity and equity across the industry, filmmakers who identify as being part of equity-deserving groups face additional barriers as a result of their identities. Participants cited institutional bias, such as racial and gender bias, as a significant challenge, and felt that their projects were often overlooked due to their identities. Furthermore, several individuals from Black, Indigenous and other racialized communities feel their unique identities and experiences are oversimplified or misunderstood by decision-makers. However, filmmakers did note that the documentary community is more advanced on issues of inclusion compared to the broader film community in Canada and acknowledged good faith efforts to fund and promote more diverse stories in the country.

Key Trends, Challenges and Opportunities

Other observed trends in the industry include a tendency for documentary filmmakers to retain their IP ownership in Canada, with 70% of survey participants retaining their rights 76%-100% of the time. The value of documentaries in community building and storytelling was also stressed, with 43% of survey respondents indicating that they had made documentaries about themselves, their families, and communities.

Finally, when asked to define “Canadian content”, within the context of upcoming changes resulting from the Online Streaming Act, most filmmakers defined it as content where IP is owned by Canadians and where Canadians occupy most key creative roles. Respondents also emphasized that because of the unique styles and perspectives of Canadian documentary filmmakers, content did not need to be set within Canadian borders to be considered Canadian.

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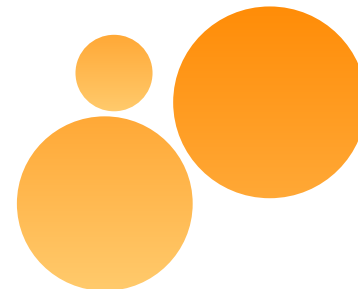
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1. Introduction

Since 2003, the Documentary Organization of Canada (DOC) has been commissioning multi-year, in-depth profiles of Canada's independent documentary production sector in the English- and French-language markets. These "Getting Real" reports provide a clear and timely view of the economic trends that are fundamental to DOC's advocacy work on behalf of the community.

DOC - with support from the Bell Fund, Telefilm Canada, the CMPA, AQPM, and Ontario Creates- commissioned Nordicity to develop the seventh edition of Getting Real. In this twentieth anniversary edition of these cornerstone industry reports, "Getting Real 7" looks at the economic impact of documentary production from 2016-2017 to 2020-2021, as well as trends in production, trends in budgets and financing, and audiences. The report also considers the experiences of documentary filmmakers, and the challenges the industry and community face.

This important seventh edition of Getting Real provides critical insights into the transformation of the documentary sector in the pre-pandemic and mid-pandemic years. In addition to twenty years of data from Getting Real reports, 2023 also marks two other key milestones: the Documentary Organization of Canada's 40th anniversary, and a fundamental turning point in the Canadian cultural sector with the adoption into law of the Online Streaming Act. This update to the Broadcasting Act now requires online platforms to contribute to the production of Canadian content for the first time, as Canadian broadcasters have been required to do for thirty years. The broadcast-driven system that has shaped multiple generations of Canadian documentary production is thus coming to a close, and a new frontier awaits.

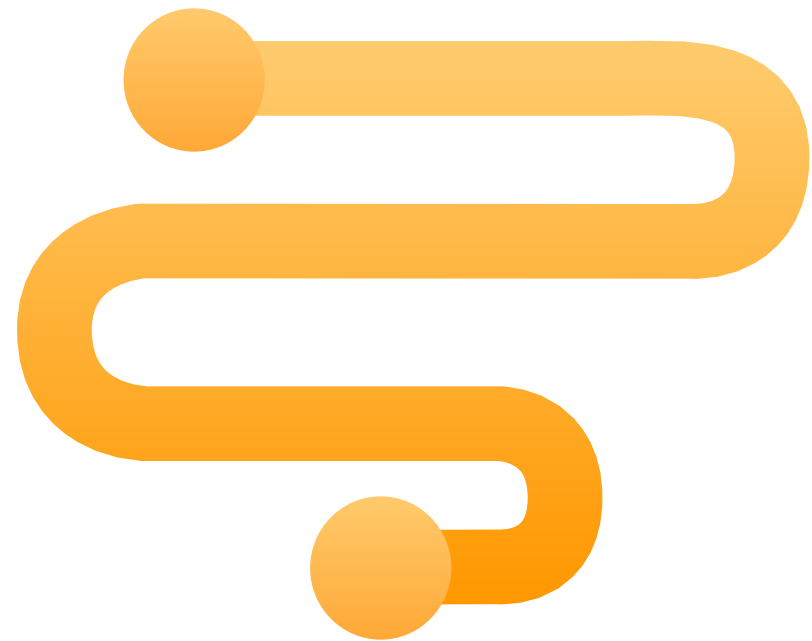


1.1 Methodology

The study was developed using a mixed-methods approach including a literature review, analysis of industry data, a survey, and stakeholder interviews. Nordicity first acquired data from the Canadian Audio-Visual Certification Office (CAVCO)¹ to form the foundation of the statistical and financial analysis of the documentary sector, and where possible (and applicable), drew on data from funding bodies such as Telefilm Canada (Telefilm), the Canada Media Fund (CMF), and the National Film Board (NFB). In order to protect anonymity, data points with a low number of responses was not shared with Nordicity or reported on.

Nordicity then collected primary data via a survey of 234 documentary creators as well as interviews with 10 documentary producers across Canada. The survey was distributed utilizing various communication channels, including e-blast, newsletter, as well as social media platforms such as Twitter, Instagram, Facebook, and LinkedIn. Additionally, the survey was made available to participants through a private discussion group specifically intended for DOC members.

Throughout the report, data exhibits are broken out by documentary format. While these format designations are largely self-reported by producers, in general, feature-length (film or TV) documentaries are over 75 minutes long, non-feature one-off documentaries are under 75 minutes, whilst series are 2 episodes or more.

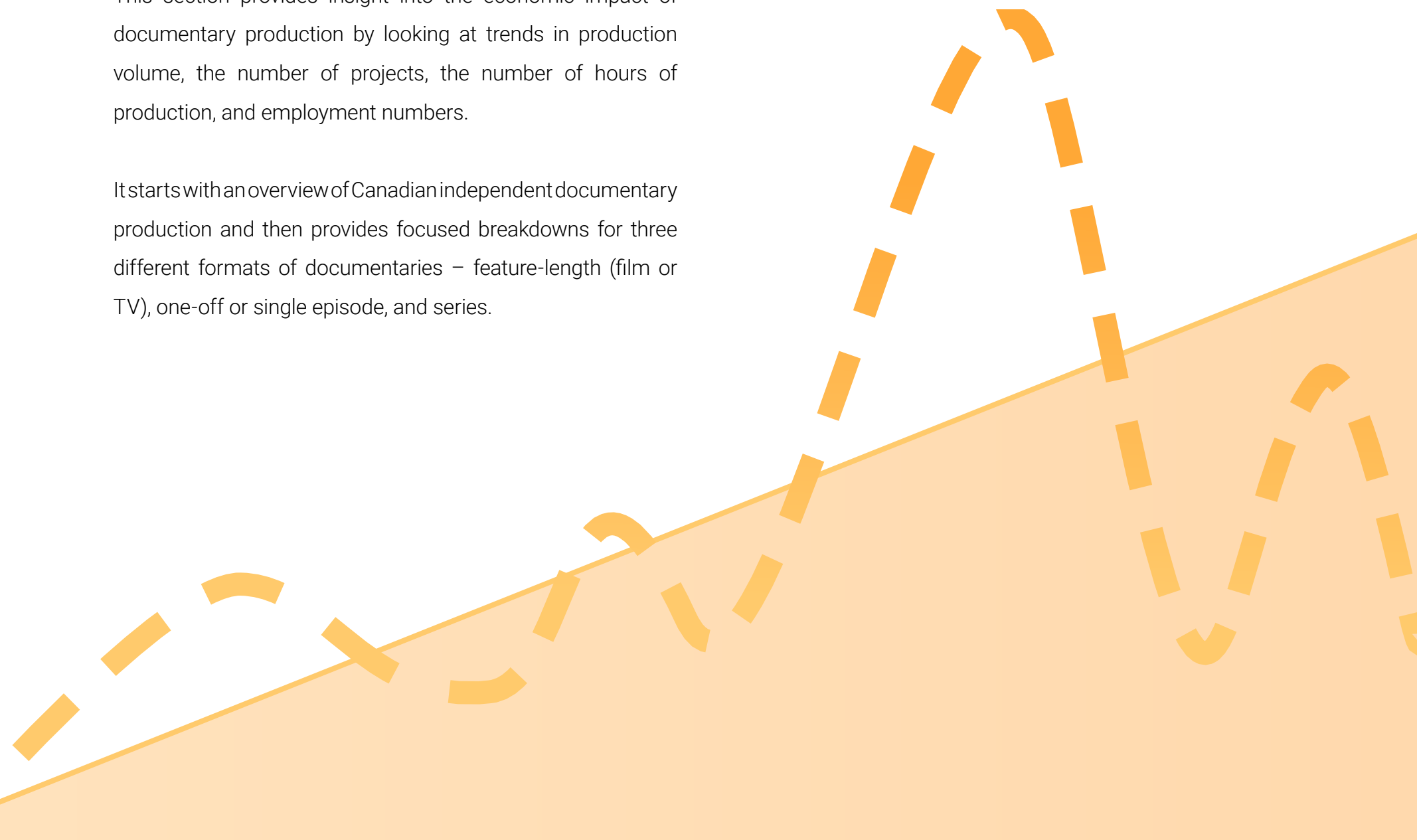


¹ Data from CAVCO is based on whatever application-stage (Part A or B) the project is at the time of the data run.

2. Economic Impact of Documentary Production

This section provides insight into the economic impact of documentary production by looking at trends in production volume, the number of projects, the number of hours of production, and employment numbers.

It starts with an overview of Canadian independent documentary production and then provides focused breakdowns for three different formats of documentaries – feature-length (film or TV), one-off or single episode, and series.



2.1 Overview of Canadian Independent Documentary

The Canadian independent documentary production sector is a strong contributor to the Canadian economy, with almost \$1.3 billion in production volume in the five years between the 2016/17 fiscal year and the 2020/21 fiscal year. Despite an overall industry decline in production volume in 2020/21 as a result of the COVID-19 pandemic, the documentary genre grew and continued to do so in 2021/22 with an increase of 53.2%, the largest increase on a percentage basis across all genres.² Additionally in 2021/22, the documentary genre was the second largest contributor to Canada's \$1.10 billion increase in content production, largely as a result of increased production of television documentaries and documentary feature films.³

Documentary series consistently made up the majority of the Canadian documentary volume throughout the time period covered by this report. This was followed by single-episode/one-off documentaries, and then feature-length (film or TV) documentaries.

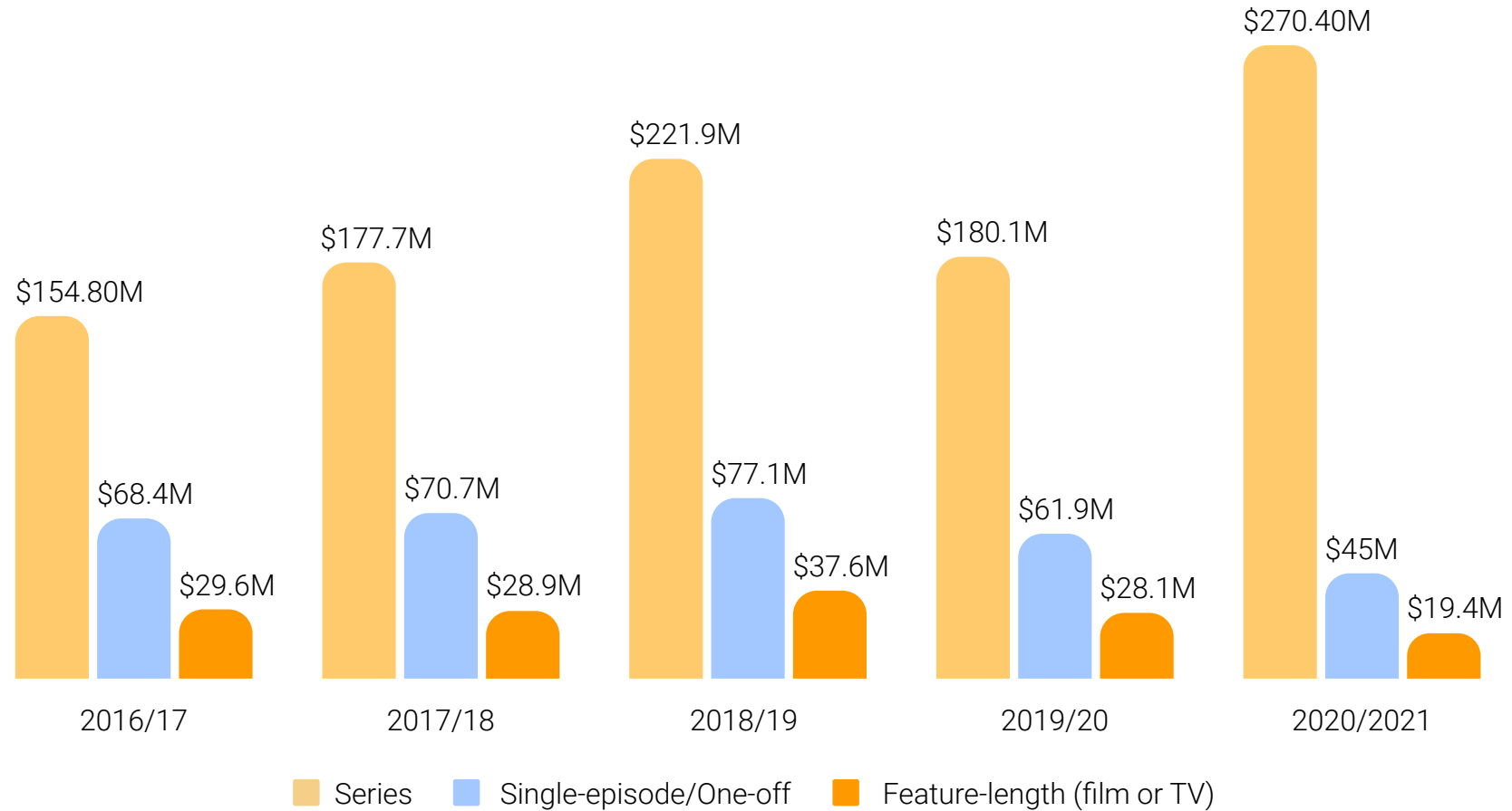
Survey results mirrored these trends, with the most frequent documentaries made being 'Series under 30 minutes', 'Series 30 minutes and over', and 'One-off short (under 15 minutes)'.

The production volume for documentary series increased steadily and rapidly between 2016/17 and 2018/19, with a drop in 2019/20, followed by a dramatic jump in 2020/21. In contrast, while both single-episode/one-off and feature-length documentaries saw a jump in production volume in 2018/19, they experienced a relatively steady overall decline between 2016/17 and 2020/21.

² Profile 2022: Economic Report on the Screen-based Media Production Industry in Canada

³ Ibid.

Figure 1 - Total Canadian Independent Documentary Production by Format: 2016/17 to 2020/21



The number of projects and the number of production hours for one-off and feature-length productions reflect similar patterns to those seen in the production volume of the two formats, though the line of growth leading up to the drop in

2019/20 is less clearly defined. Documentary series projects and hours also show the same growth and decline pattern, though the 2019/20 declines are less significant compared to production volume.

Figure 2 - Total Production Volume, Number of Projects and Hours Produced of Canadian Independent Documentary Production by Format: 2016/17 to 2020/21

Production (\$ millions)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|---------|-----------|---------|
| Series | 154.8 | 177.7 | 221.9 | 180.1 | 270.4 |
| Single-episode/One-off | 68.4 | 70.7 | 77.7 | 61.9 | 45.0 |
| Feature-length (film or TV) | 29.6 | 28.9 | 37.6 | 28.1 | 19.4 |
| Total | 252.8 | 277.3 | 336.6 | 270.1 | 334.8 |

Number of Projects

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|---------|-----------|---------|
| Series | 154.8 | 177.7 | 221.9 | 180.1 | 270.4 |
| Single-episode/One-off | 68.4 | 70.7 | 77.7 | 61.9 | 45.0 |
| Feature-length (film or TV) | 29.6 | 28.9 | 37.6 | 28.1 | 19.4 |
| Total | 252.8 | 277.3 | 336.6 | 270.1 | 334.8 |

Number of Hours

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|---------|-----------|---------|
| Series | 751 | 758 | 835 | 783 | 1225 |
| Single-episode/One-off | 207 | 185 | 208 | 169 | 139 |
| Feature-length (film or TV) | 80 | 80 | 90 | 74 | 53 |
| Total | 1038 | 1023 | 1130 | 1026 | 1417 |

Source: Nordicity estimates based on data from CAVCO

The impressive trajectory of documentary series is reflected in the share of the Canadian television series market that they hold. The share of production volume of all series increased from 6.1% to 13.2%, whilst the share of the number of projects increased from 16.6% to 29.1%.

Despite significant drops in the production volume of single-episode/one-off documentaries, they continue to make up over half of all production of this format in Canada.

This is because the production of single-episode/one-off content has declined across the industry, not just documentaries.⁴ Feature-length documentaries, that already made up a very small share of broader Canadian feature-length production, have declined steadily since 2018/19, reaching a low of 2.4% of production volume and 11.4% of number of projects in 2020/21.

⁴ Profile 2022, CMPA, https://cmpa.ca/wp-content/uploads/2023/08/Profile-2022-EN_v4.pdf

Figure 3 - Share of Documentary Relative to All Canadian Content Production by Format: 2016/17 to 2020/21

Production (\$ millions)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|---------|-----------|---------|
| Series | 6.1% | 7.1% | 8.9% | 7.4% | 13.2% |
| Single-episode/One-off | 52.2% | 52.7% | 53.5% | 59.8% | 57.4% |
| Feature-length (film or TV) | 5.1% | 5.4% | 6.1% | 4.6% | 2.4% |

Number of Projects

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|---------|-----------|---------|
| Series | 16.6% | 16.8% | 17.6% | 18.3% | 29.1% |
| Single-episode/One-off | 66.6% | 64.9% | 61.6% | 63.1% | 71.3% |
| Feature-length (film or TV) | 21.6% | 21.5% | 21.4% | 18.4% | 11.4% |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

Between fiscal years 2016/17 and 2020/21, there has also been a significant drop in the number of jobs created in single-episode/one-off and feature-length (film or TV) documentary production. Despite fluctuations in 2018/19, the number of full-time equivalent (FTE) direct and spin-off jobs created fell from 1,620 to 750 for single-episode/one-off documentary production, and from 700 to 320 for feature-length (film or

TV) documentary production. The number of direct FTE jobs fell from 640 to 380 for single-episode/one-off documentary production, and from 280 to 160 for feature-length (film or TV) documentary production. FTE direct and spin-offs for documentary series on the other hand increased from 3,670 in 2016/17 to 4,520 in 2020/21, with direct FTEs increasing from 1,450 in 2016/17 to 2,300 in 2020/21.

Figure 4 – Total Employment Impact (Direct and Spinoff Jobs) by Documentary Format: 2016/17 to 2020/21

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|-----------------------------|---------|---------|---------|-----------|---------|
| Series | 3670 | 3560 | 4200 | 3260 | 4520 |
| Single-episode/One-off | 1620 | 1420 | 1460 | 1120 | 750 |
| Feature-length (film or TV) | 700 | 580 | 710 | 510 | 320 |
| Total | 5990 | 5560 | 6370 | 4890 | 5590 |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

Figure 5 - Total Direct Jobs in Independent Film and Television Production by Format: 2016/17 to 2020/21

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|---------|-----------|---------|
| Series | 1450 | 1680 | 2020 | 1610 | 2300 |
| Single-episode/One-off | 640 | 670 | 700 | 550 | 380 |
| Feature-length (film or TV) | 280 | 270 | 340 | 250 | 320 |
| Total | 2370 | 2620 | 3060 | 2410 | 2840 |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

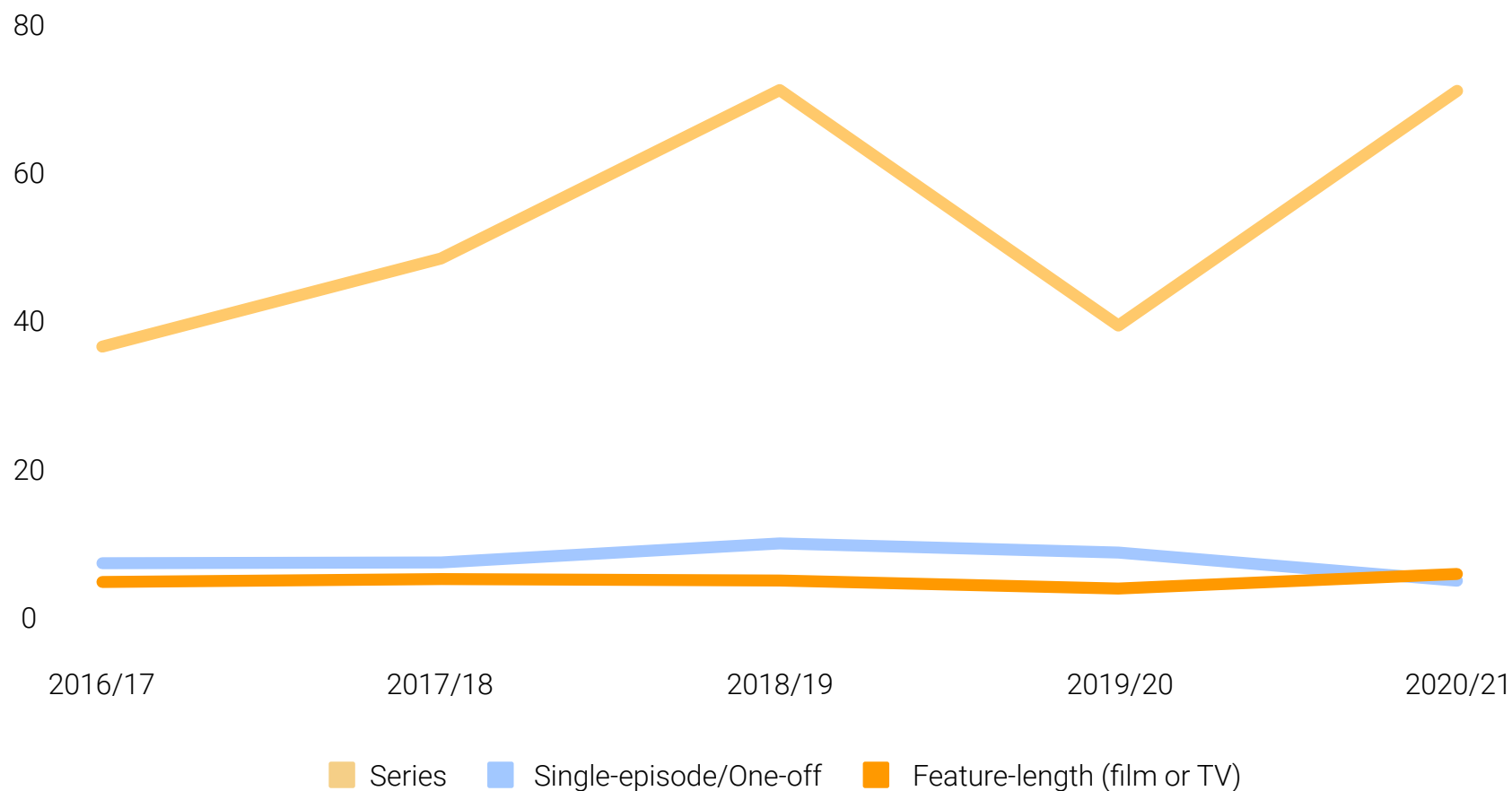
International financing of Canadian independent documentaries increased overall, from \$44.4 million to \$76.1 million. This trend was driven primarily by increases in series documentaries (that almost doubled), though foreign

investment in feature-length (film or TV) also increased between 2016/17 and 2020/21. International financing of single-episode/one-off documentaries decreased over the same five-year period.

Figure 6 - Foreign Investment in Canadian Independent Documentary Production by Format: 2016/17 to 2020/21 (\$ millions)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|---------|-----------|---------|
| Series | 34.0 | 45.3 | 66.9 | 36.7 | 66.8 |
| Single-episode/One-off | 6.4 | 6.5 | 9.0 | 7.8 | 4.1 |
| Feature-length (film or TV) | 4.0 | 4.4 | 4.2 | 3.1 | 5.1 |
| Total | 44.4 | 56.2 | 80.1 | 47.6 | 76.1 |

Figure 7 - Foreign Investment in Canadian Independent Documentary Production by Format: 2016/17 to 2020/21 (\$ millions)



The independent documentary production sector in Canada contributed \$421 million to Gross Domestic Product in 2020/21 based on \$335 million direct production spending and through almost 5600 direct and spin-off jobs. When compared to values reported in Getting Real 6, employment (FTEs) dropped

slightly, but labour income and contribution to GDP increased considerably. These numbers indicate that the documentary industry continues to add strong economic value to Canada's film and television industry, and economy more broadly.

Figure 8 - Economic Impact of Documentary Production in Canada by Format: 2020/21

| | | Series | Single-episode/One-off | Feature-length (film or TV) | Total |
|-----------------|-----------------------------|--------|------------------------|-----------------------------|--------------|
| Direct | Employment (FTEs) | 2,300 | 382 | 165 | |
| | Labour Income (\$ millions) | 150 | 26 | 11 | |
| | GDP (\$ millions) | 160 | 26 | 11 | |
| Spin-off | Employment (FTEs) | 2,230 | 371 | 160 | |
| | Labour Income (\$ millions) | 120 | 20 | 9 | |
| | GDP (\$ millions) | 180 | 30 | 13 | |
| Total | Employment (FTEs) | 4,530 | 753 | 324 | 5,607 |
| | Labour Income (\$ millions) | 270 | 46 | 20 | 336 |
| | GDP (\$ millions) | 340 | 57 | 25 | 421 |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

2.2 Feature-length (film or TV) Documentaries

Feature-length (film or TV) documentary production continues to contribute a small fraction to overall production levels of Canadian documentaries but has fallen over the last 5 years. Between 2016/17 and 2020/21, the volume of feature-length

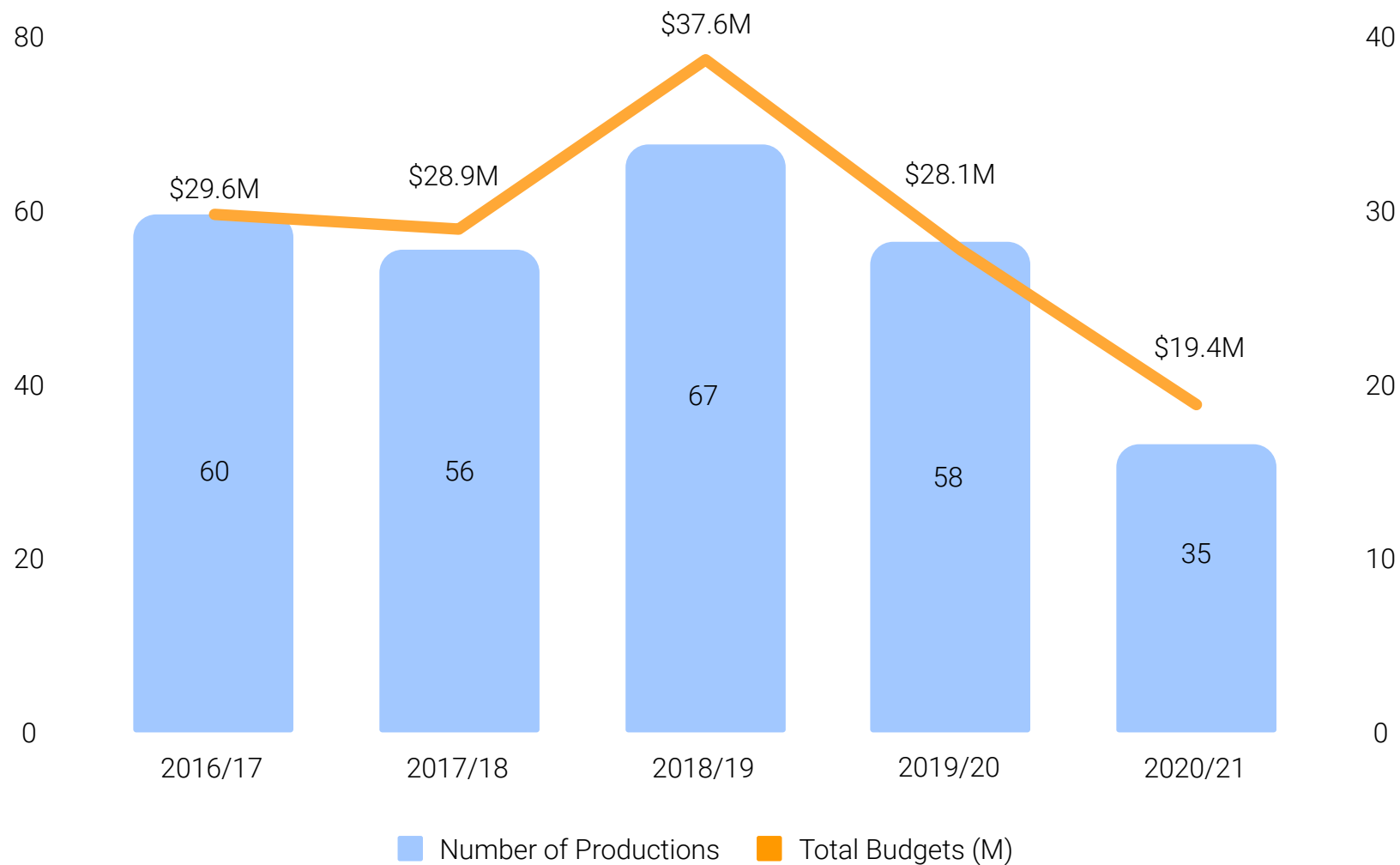
(film or TV) documentary production fell from \$29.6 million to \$19.4 million. The number of projects also declined from 60 to 35, while the number of hours of documentary production declined from 80 to 53 over the same 5-year period.

Figure 9 - Total Volume, Number of Projects and Hours Produced of Canadian Independent Documentary Feature-length (Film or TV) Production: 2016/17 to 2020/21

| | Production Volume (\$ millions) | Number of Productions | Number of Hours Produced |
|---------|------------------------------------|-----------------------|-----------------------------|
| 2016/17 | 29.6 | 60 | 80 |
| 2017/18 | 28.9 | 56 | 80 |
| 2018/19 | 37.6 | 67 | 90 |
| 2019/20 | 28.1 | 58 | 74 |
| 2020/21 | 19.4 | 35 | 53 |

Source: Nordicity estimates based on data from CAVCO

Figure 10 - Total Volume and Number of Projects of Canadian Feature-length (Film or TV) Documentary Production: 2016/17 to 2020/21



Between 2016/17 and 2020/21, documentary's share of total budgets and the number of productions fell drastically, from 5.1% to 2.4% and 21.6% to 11.4% respectively.

Figure 11 - Feature-length (Film or TV) Documentary Share of all Canadian Independent Feature-length Production: 2016/17 to 2020/21

| | Share of Production Volume | Share of Number of Productions |
|---------|-------------------------------|-----------------------------------|
| 2016/17 | 5.1% | 21.6% |
| 2017/18 | 5.4% | 21.5% |
| 2018/19 | 6.1% | 21.4% |
| 2019/20 | 4.6% | 18.4% |
| 2020/21 | 2.4% | 11.4% |

Source: Nordicity estimates based on data from CAVCO

The total volume of English-language feature-length (film or TV) documentary production decreased significantly between 2016/17 and 2020/21, falling from \$24.3 million to \$13.9 million. The total volume of French-language feature-length (film or TV) documentary fluctuated considerably over the 5-year period, with a large increase 2019/20 to \$8.7 million, followed by a drop to \$5.5 million in 2020/21.

Figure 12 - Total Volume of English- and French-language Feature-length Documentary Production: 2016/17 to 2020/21

| | Total English-language Production Volume (\$ millions) | Total French-language Production Volume (\$ millions) | Combined Total (\$ millions) |
|---------|---|--|---------------------------------|
| 2016/17 | 24.3 | 5.3 | 29.6 |
| 2017/18 | 22.1 | 6.7 | 28.9 |
| 2018/19 | 30.8 | 6.9 | 37.6 |
| 2019/20 | 19.3 | 8.7 | 28.1 |
| 2020/21 | 13.9 | 5.5 | 19.4 |

Source: Nordicity estimates based on data from CAVCO

Figure 13 - Total Volume of Production of English-language Feature-length (Film or TV) Documentaries by Region: 2016/17 to 2020/21 (\$ millions)⁵

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|--|---------|-------------------|-------------------|-------------------|---------|
| Ontario | 11.9 | 8.6 | 17.6 | 8.2 | 5.4 |
| Quebec | 4.3 | 7.4 | 7.8 | 4.9 | 2.8 |
| Other Provinces and Territories | 8.1 | 6.2 | 5.7 | 6.3 | 5.7 |
| Total | 24.3 | 22.1 ⁶ | 30.8 ⁷ | 19.3 ⁸ | 13.9 |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

The total volume of feature-length (film or TV) production decreased across all regions from 2016/17 to 2020/21. Ontario - the region with the highest volume of feature-length (film or TV) documentary production- more than halved production levels, while Quebec came close to doing the same.

⁵ Numbers for French-language feature-length (film or TV) documentaries by region were too low to report on separately. CAVCO combined the data for French-language features outside Quebec with the English-language features outside of Quebec due to low data issues.

⁶ Numbers in this column do not add up to 22.1 due to rounding

⁷ Numbers in this column do not add up to 30.8 due to rounding

⁸ Numbers in this column do not add up to 19.3 due to rounding

2.3 Single Episode/One-off Documentaries

Single-episode/one-off documentaries have decreased from 2016/17 to 2020/21. Despite an increase in 2018/19, the volume of single-episode/one-off documentary production fell approximately 35% from \$68.4 million to \$45 million in 5

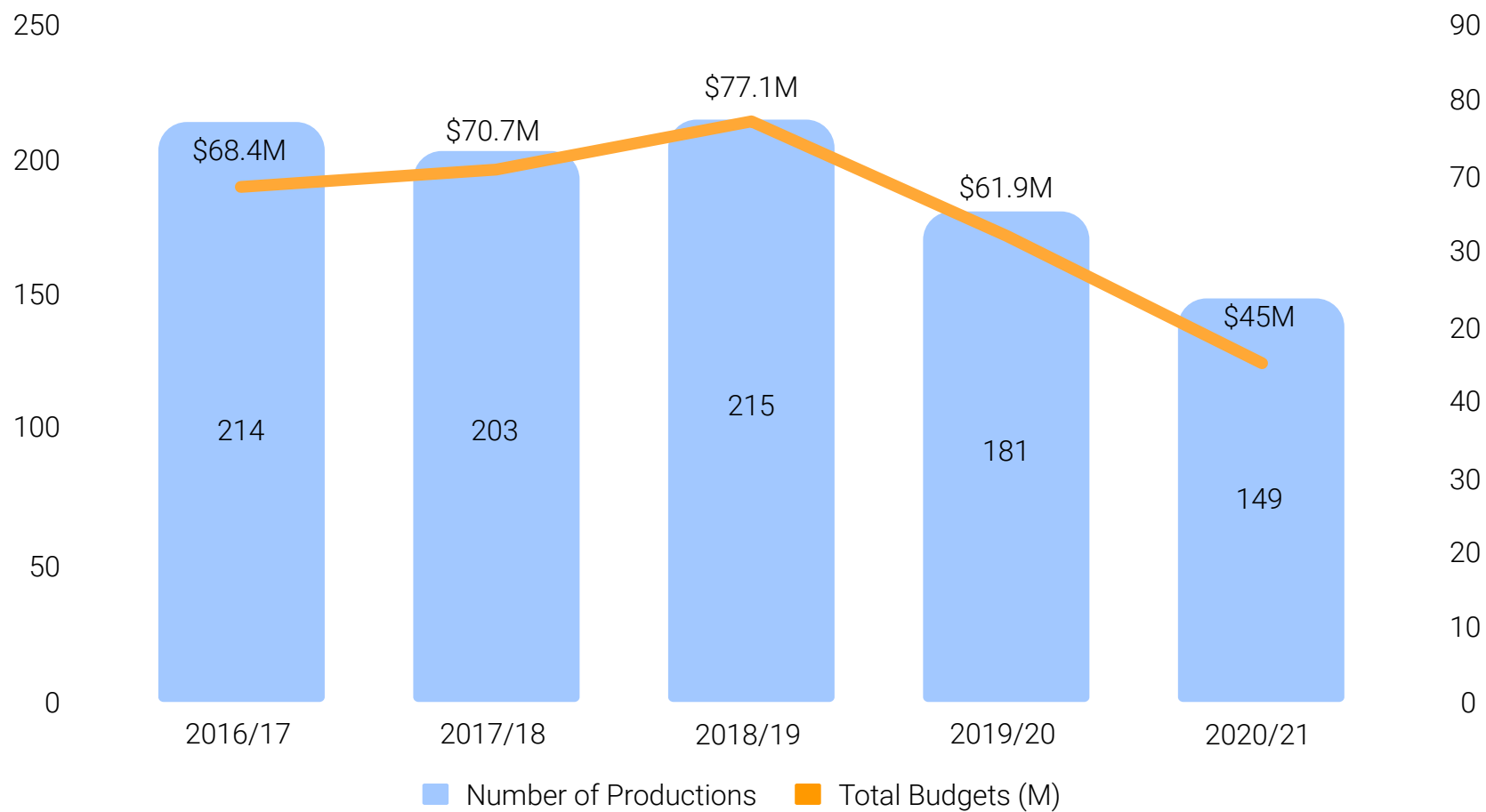
years. The total number of productions fell approximately 30% from 214 to 149, while the number of hours produced also fell approximately 33% from 207 hours to 139 hours.

Figure 14 - Total Volume, Number of Projects and Hours Produced of Canadian Independent Single-episode/One-off Documentary Production: 2016/17 to 2020/21

| | Production Volume (\$ millions) | Number of Productions | Number of Hours Produced |
|---------|---------------------------------|-----------------------|--------------------------|
| 2016/17 | 68.4 | 214 | 207 |
| 2017/18 | 70.7 | 203 | 185 |
| 2018/19 | 77.1 | 215 | 208 |
| 2019/20 | 61.9 | 181 | 169 |
| 2020/21 | 45.0 | 149 | 139 |

Source: Nordicity estimates based on data from CAVCO

Figure 15 - Total Volume and Number of Projects of Canadian Single-episode/One-off Documentary Production: 2016/17 to 2020/21 (\$ millions)



On average, single-episode/one-off documentaries made up on average 55% of production volume and 65% of the number of productions of total Canadian independent single-episode/one-off productions between 2016/17 and 2020/21. This share

remained relatively consistent despite significant declines in production numbers because of drops across all Canadian one-off production.⁹

⁹ Profile 2022, CMPA, https://cmpa.ca/wp-content/uploads/2023/08/Profile-2022-EN_v4.pdf.

Figure 16 - Single-episode/One-off Documentary Share of all Canadian Independent Production: 2016/17 to 2020/21

| | Share of Production Volume | Share of Number of Productions |
|----------------|-------------------------------|-----------------------------------|
| 2016/17 | 52.2% | 66.3% |
| 2017/18 | 52.7% | 64.9% |
| 2018/19 | 53.6% | 61.6% |
| 2019/20 | 59.8% | 63.1% |
| 2020/21 | 57.4% | 71.3% |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

The total volume of single episode/one-off documentary production decreased across all regions from 2016/17 to 2020/21. Ontario is by far the region with the highest volume of single episode/one-off documentary production, followed by British Columbia and Quebec.

Figure 17 - Total Volume of English- and French-language Single Episode/One-off Documentary Production: 2016/17 to 2020/21

| | Total English-language Production Volume (\$ millions) | Total French-language Production Volume (\$ millions) |
|----------------|--|---|
| 2016/17 | 50.0 | 18.4 |
| 2017/18 | 55.7 | 15.1 |
| 2018/19 | 61.4 | 15.6 |
| 2019/20 | 50.1 | 11.8 |
| 2020/21 | 30.0 | 14.9 |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

The total volume of English-language single episode/one-off documentary production decreased by between 2016/2017 and 2020/21, falling from \$50 million to \$30 million. The total volume of French-language single episode/one-off documentary production also decreased in the 5-year period, falling from \$18.4 million to \$14.9 million.

**Figure 18 - Total Volume of Production of English-language Single-episode/One-off Documentaries by Region:
2016/17 to 2020/21 (\$ millions)**

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|--|---------|---------|---------|-----------|---------|
| Atlantic Canada | 5.2 | 6.1 | 3.5 | 3.9 | 2.3 |
| British Columbia | 7.7 | 10.9 | 9.3 | 9.1 | 3.2 |
| Ontario | 29.2 | 30.3 | 33.1 | 23.7 | 16.2 |
| Prairie Provinces and Territories | 2.6 | 4.5 | 8.5 | 3.4 | 3.7 |
| Quebec | 5.5 | 3.8 | 7.0 | 10.0 | 4.6 |
| Total | 50.2 | 55.6 | 61.4 | 50.1 | 30.0 |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

As expected, Quebec has the highest volume of production of French-language single episode/one-off documentaries. The production volume in Quebec increased from \$5.2 million in

2016/2017 to \$13.2 million in 2020/21. However, production volume in other Canadian regions decreased significantly from \$7.7 million to \$1.8 million in the same five-year period.

**Figure 19 - Total Volume of Production of French-language Single-episode/One-off Documentaries by Region:
2016/17 to 2020/21 (\$ millions)**

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|---------------|---------|---------|---------|-----------|---------|
| Quebec | 5.2 | 12.7 | 13.5 | 10.5 | 13.2 |
| Other | 7.7 | 2.3 | 2.2 | 1.3 | 1.8 |
| Total | 12.9 | 15.0 | 15.7 | 11.8 | 15.0 |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

2.4 Documentary Series

Documentary series production volume and number of hours produced have both grown significantly over the five years studied for this report, with only a dip in 2019/20 to interrupt a strong upward trajectory. The number of productions over the same period showed less defined growth, but still had

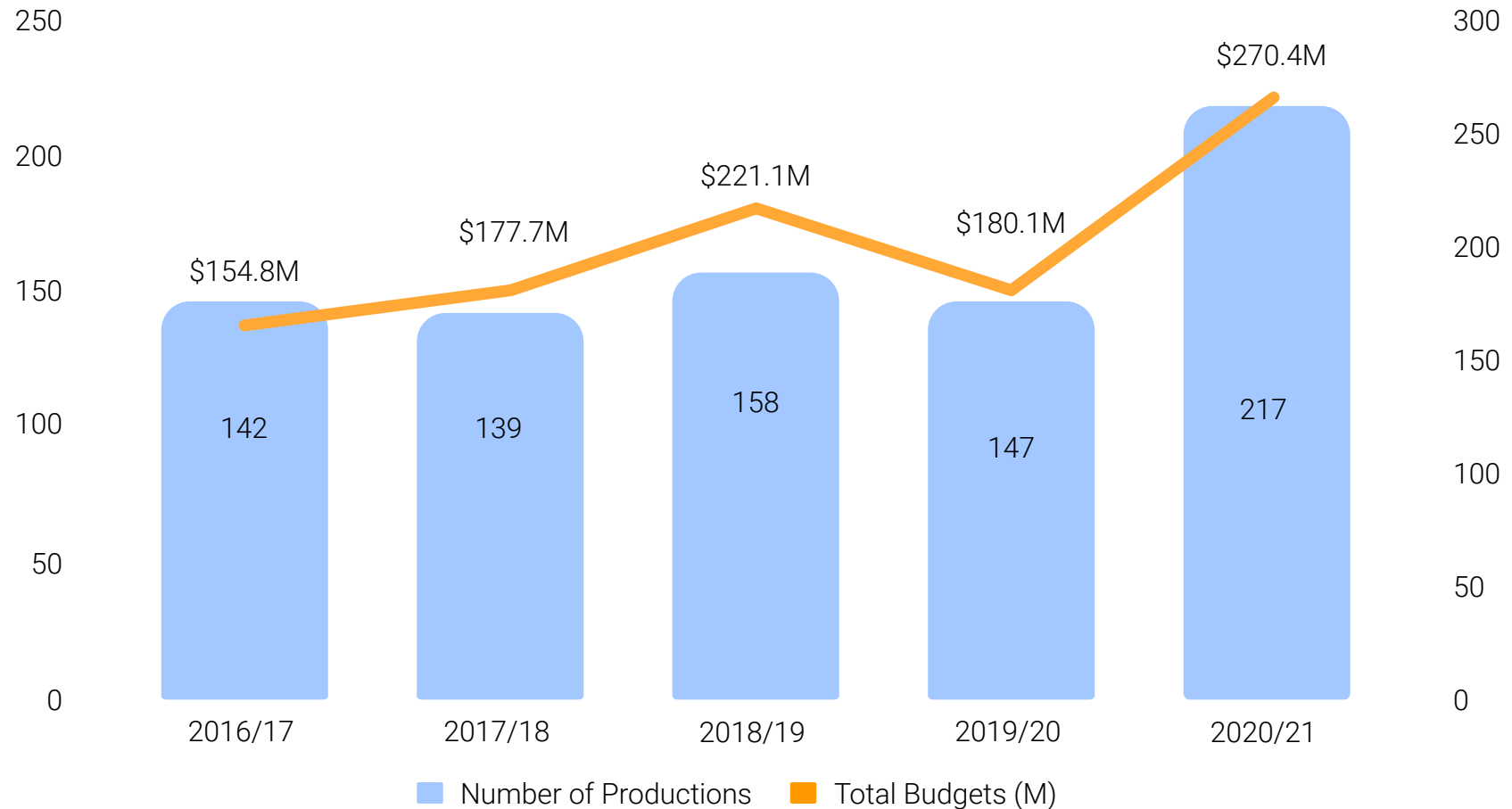
the same spike in 2020/21. The increase in the number of hours between 2019/20 and 2020/21 for documentary series is much sharper than the increases in number of projects or production volume.

Figure 20 - Total Volume, Number of Projects and Hours Produced of Canadian Independent Documentary Feature-length (Film or TV) Production: 2016/17 to 2020/21

| | Production Volume (\$ millions) | Number of Productions | Number of Hours Produced |
|---------|---------------------------------|-----------------------|--------------------------|
| 2016/17 | 154.8 | 142 | 751 |
| 2017/18 | 177.7 | 139 | 758 |
| 2018/19 | 221.9 | 158 | 832 |
| 2019/20 | 180.1 | 147 | 783 |
| 2020/21 | 270.4 | 217 | 1225 |

Source: Nordicity estimates based on data from CAVCO

Figure 21 - Total Volume and Number of Projects of Canadian Series Documentary Production: 2016/17 to 2020/21 (\$ millions)



Source: Nordicity estimates based on data from CAVCO

Documentary series took up a very small percentage of the total budgets of all Canadian independent series productions, but represented a more significant share of the number

of productions. Both percentages jumped significantly in 2020/21, with documentary series growing to have almost a 30% share of Canadian independent series productions.

Figure 22 - Documentary Series Share of all Canadian Independent Series Production: 2016/17 to 2020/21

| | Share of Production Volume | Share of Number of Productions |
|---------|-------------------------------|-----------------------------------|
| 2016/17 | 6.1% | 16.6% |
| 2017/18 | 7.7% | 16.8% |
| 2018/19 | 8.9% | 17.6% |
| 2019/20 | 7.4% | 18.3% |
| 2020/21 | 13.2% | 29.1% |

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2021

In 2016/17, French-language documentary series production volume made up just over a third (33.5%) of total documentary series production. In the following two years, this share dropped to under 20%. However, while French-language sector rose back to 2016/17 levels in 2019/20, and continued this upwards

trajectory in 2020/21, suggesting ongoing growth in the French-language sector. Despite falling drastically in 2019/20, English-language documentary series production has also experienced significant growth over the five-year period.

Figure 23 - Total Volume of English- and French-language Documentary Series Production: 2016/17 to 2020/21

| | English Production Volume (\$ millions) | French Production Volume (\$ millions) | Combined Total (\$ millions) |
|----------------|--|---|---------------------------------|
| 2016/17 | 102.8 | 51.9 | 154.8 |
| 2017/18 | 142.8 | 34.9 | 177.7 |
| 2018/19 | 185.0 | 36.9 | 221.9 |
| 2019/20 | 126.4 | 53.7 | 180.1 |
| 2020/21 | 189.8 | 80.6 | 270.4 |

Source: Nordicity estimates based on data from CAVCO

Ontario has consistently made up the majority of English-language documentary series production across the previous five fiscal years, representing over half of the volume of production nation-wide. British Columbia's documentary series production mostly increased over the reviewed period, but has remained at between 10-15% of Canada's total production, with the exception of a spike in 2019/20. While contributions

from the Prairie Provinces and Territories have fluctuated, they have remained reasonably consistent on average, meaning that their share of the national production volume has been waning. With the exception of a spike in 2018/19, Quebec's share of English-language documentary series production has remained fairly small, and Atlantic Canada's has remained even smaller.

Figure 24 - Total Volume of Production of English-language Documentary Series by Region: 2016/17 to 2020/21 (\$ millions)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|--|---------------------|---------|---------|-----------|---------|
| Atlantic Canada | 0.3 | 3.8 | 5.6 | 6.6 | 16.5 |
| British Columbia | 10.7 | 22.2 | 21.8 | 24.7 | 28.9 |
| Ontario | 53.5 | 88.9 | 109.9 | 80.8 | 113.4 |
| Prairie Provinces and Territories | 26.7 | 14.3 | 20.5 | 15.1 | 25.0 |
| Quebec | 11.5 | 13.6 | 27.2 | 0.0 | 6.0 |
| Total | 102.8 ¹⁰ | 142.8 | 185.0 | 126.4 | 189.8 |

Source: Nordicity estimates based on data from CAVCO

As would be expected, Quebec has consistently made up the vast majority of French-language documentary series production across the last five years, representing between roughly 80-90% of the national production volume.

Figure 25 - Total Volume of Production of French-language Documentary Series by Region: 2016/17 to 2020/21 (\$ millions)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|---------------|---------|---------|---------|-----------|---------|
| Quebec | 41.6 | 28.9 | 33.9 | 49.0 | 71.6 |
| Other | 10.3 | 6.0 | 3.0 | 4.7 | 9.0 |
| Total | 51.9 | 34.9 | 36.9 | 53.7 | 80.6 |

Source: Nordicity estimates based on data from CAVCO

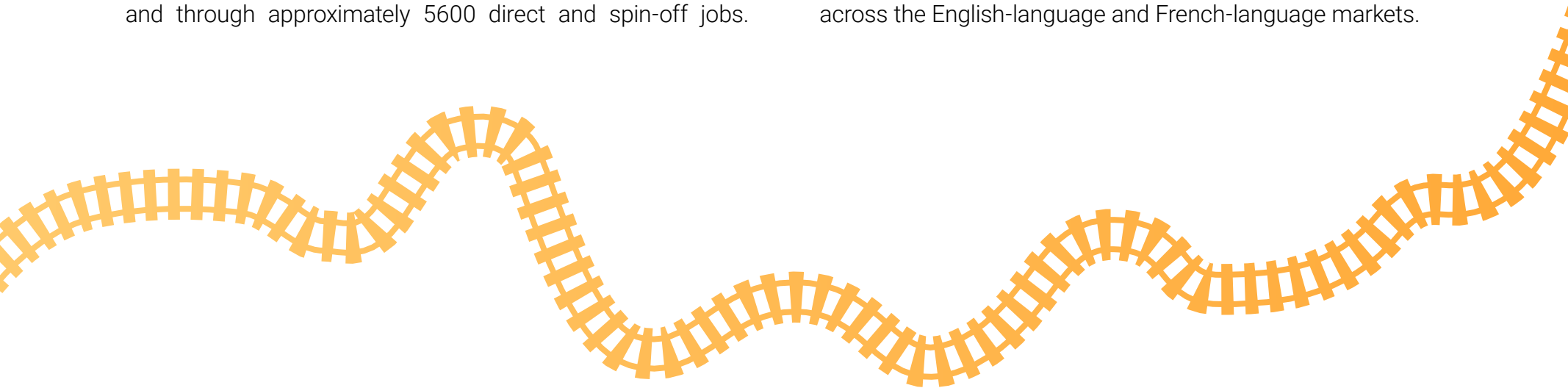
¹⁰ Numbers in this column do not add up to 102.8 due to rounding

2.5 Summary Findings

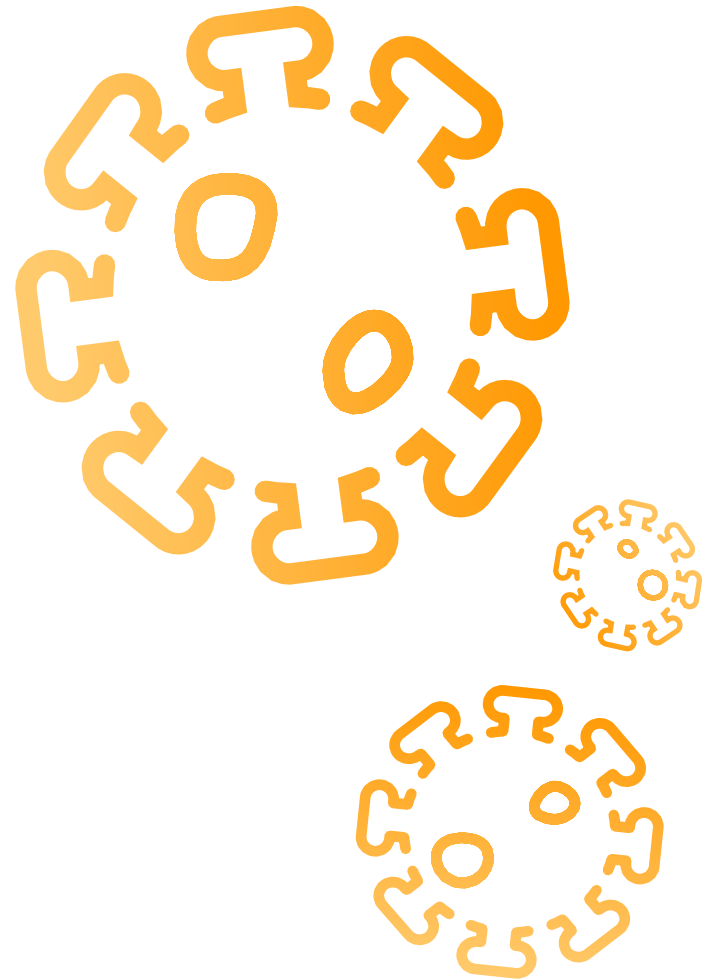
The Canadian independent documentary production sector is a strong contributor to the Canadian economy, with almost \$1.3 billion in production volume in the five years between the 2016/17 fiscal year and the 2020/21 fiscal year. Despite an overall industry decline in production volume in 2020/21 as a result of the COVID-19 pandemic, the documentary genre grew and continued to do so in 2021/22 with an increase of 53.2%, the largest increase on a percentage basis across all genres.

The independent documentary production sector in Canada contributed \$421 million to Gross Domestic Product in 2020/21 based on \$335 million direct production spending and through approximately 5600 direct and spin-off jobs.

Overall documentary production grew approximately 32% between 2016/17 and 2020/21, whilst the number of hours of production increased by almost 37% during this period. The number of projects being made during this period fell slightly by around 4%. International financing of Canadian independent documentaries also increased overall, from \$44.4 million to \$76.1 million. These trends were driven by documentary series, that consistently made up most of the Canadian documentary sector during the five-year period studied in this research. In contrast, single-episode/one-off and feature-length (film or TV) documentaries experienced a relatively steady overall decline between 2016/17 and 2020/21. These trends were seen across the English-language and French-language markets.



Interviews with documentary creators revealed that several producers faced major setbacks as a result of the COVID-19 pandemic and even had productions ground to a halt. These delays were caused by several factors, including issues with cashflow from funders or investors; a lack of the necessary technology and supports to continue doing post-production work; the psychological cost of loneliness and social distancing; or an inability to do the kind of shooting that was required to tell their stories, due to distancing requirements and travel restrictions. These impacts were exacerbated for productions that engaged with Indigenous communities due to specific obstacles related to travel restrictions on-reserve, lack of alternative travel means, community-specific health and safety measures, and others.





In addition, although this research focuses on English- and French-language production which makes up the majority of documentary film production in Canada, survey results reveal that documentaries are made in diverse languages. Participants reported creating documentary films in Indigenous

languages (6%) (including from Ojibwe, Cree, Anishinaabe, Inuvialuktun and Mohawk), as well as other languages (9%) (including Amharic, Korean, Urdu, and Hindu). In addition, 35% of participants produced content in more than one language.

3. Overview of Documentary Production Budgets

3.1 English-language

Average per-hour production budgets for English-language documentaries fluctuated between 2016/17 and 2020/21. In three out of the five years, single-episode/one-off documentaries had the highest budgets per hour of all English-language formats in different years. In 2020/21, average per-hour production budgets for single-episode/one-off

documentaries was \$376,353, followed by feature-length (film or TV) with an average of \$350,556.¹¹ Documentary series had significantly lower per-hour budgets, ranging from a low-average per-hour budget of \$288,068 in 2017/18 to \$350,950 in 2018/19. This may be a result of cost amortization.

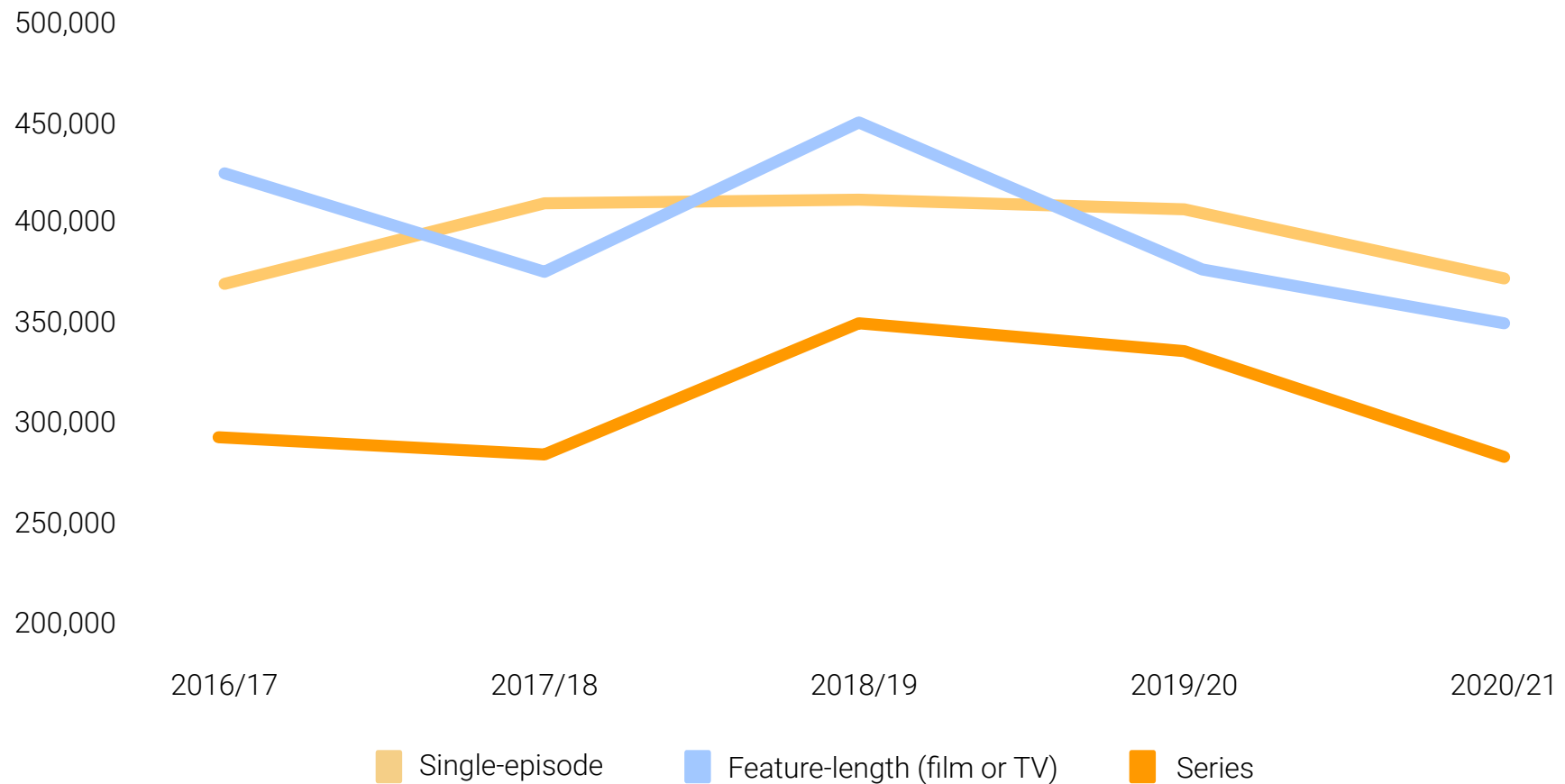
Figure 26 - Average Per-hour Budgets, All Documentary Formats, English-language: 2016/17 to 2020/21

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|-----------------------------|-----------|-----------|-----------|-----------|-----------|
| Series | \$294,340 | \$288,068 | \$350,950 | \$344,131 | \$289,115 |
| Single-episode/One-off | \$377,615 | \$413,983 | \$415,576 | \$414,121 | \$376,353 |
| Feature-length (film or TV) | \$417,658 | \$372,627 | \$453,065 | \$377,519 | \$350,556 |

Source: CAVCO

¹¹ Feature-length theatrical film budgets are typically higher, however, CAVCO's "feature-length (film or TV)" includes lower budget TV projects.

Figure 27 - Average Per-hour Budgets, All Documentary Formats, English-language



Source: CAVCO

Over the five-year period, approximately 43% of documentary series had average per-hour production budgets situated in the \$100K - \$249K bracket. Another 30% had average per-hour budgets of \$250K - \$500K. The figure below provides a breakdown by year.

Figure 28 - Distribution by Budget Range of Per-hour Budgets, Documentary Series, English-language, 2016/17 to 2020/21¹²

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|---------------|---------|---------|---------|-----------|---------|
| <\$100K | 10% | 14% | 13% | 11% | 6% |
| \$100K-\$249K | 44% | 41% | 40% | 32% | 57% |
| \$250K-\$500K | 31% | 28% | 27% | 34% | 28% |
| >\$500K | 15% | 17% | 21% | 23% | 9% |

Source: CAVCO

Figure 29 - Average Per-hour Budgets, Documentary Film and Television, English-language, 2016/17 to 2020/21

| | Average Per-hour Budget |
|---------------|-------------------------|
| 2016/17 | 307,319 |
| 2017/18 | 313,331 |
| 2018/19 | 364,728 |
| 2019/20 | 346,680 |
| 2020/21 | 292,263 |
| Total Average | 324,864 |

Source: CAVCO

Between 2016/17 and 2020/21 the total average per-hour production budgets of English-language documentaries was \$324,864. Average production budgets peaked in 2018/19 at \$364,728, and have declined, with the average production budget being \$292,263 in 2020/21.

¹² Data for single-episode and feature-length (film or TV) were not reported on due to low data issues.

3.2 French-language

Between 2016/17 and 2020/21, feature-length projects had the highest budgets per hour of all French-language formats with an average of \$398,485 in 2020/21. This was followed by single-episode documentaries, with an average of \$231,259.

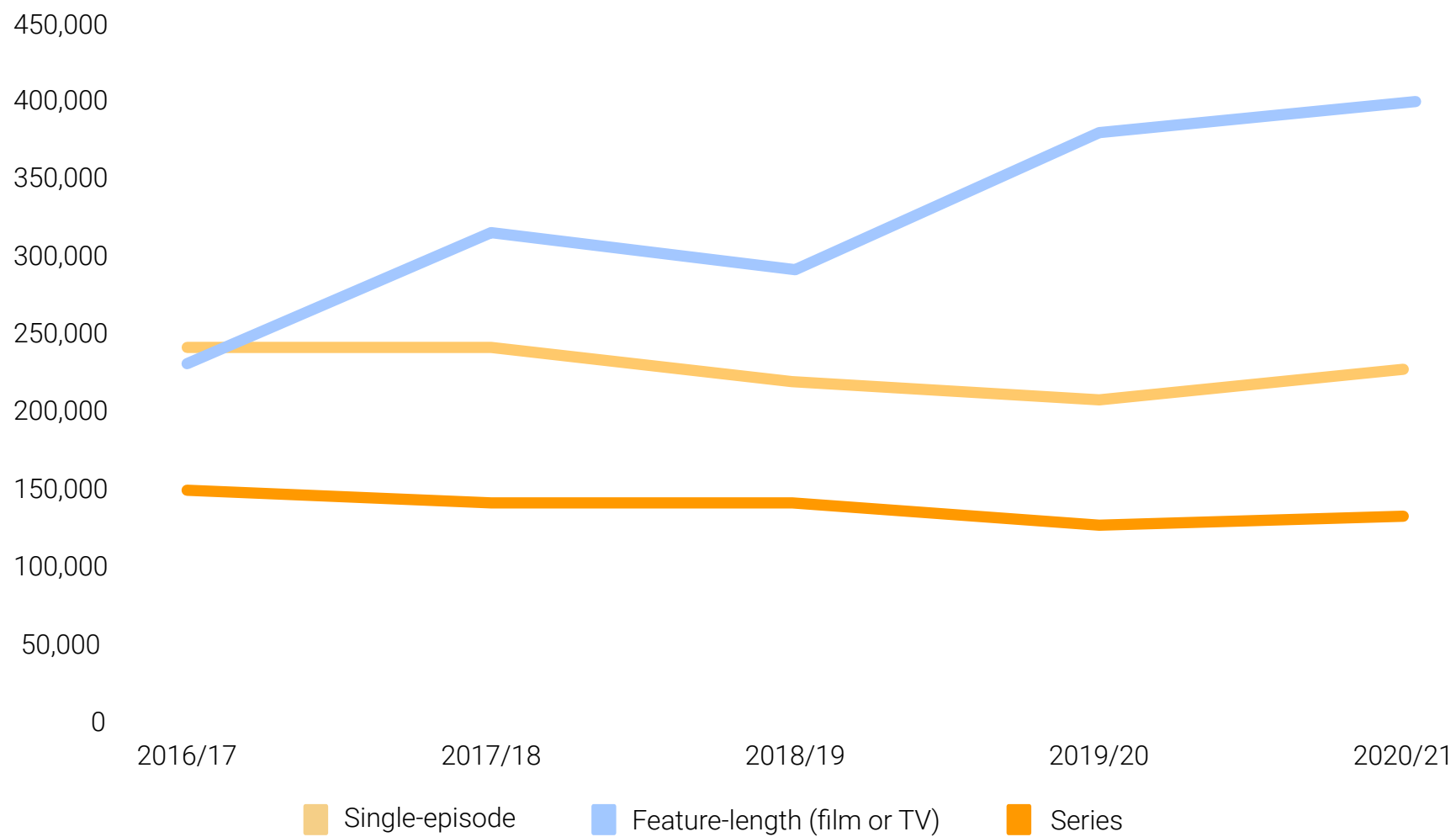
Similar to English-language productions, series productions had the lowest average per-hour budgets ranging from a low of \$141,307 in 2019/20 to a high of \$153,892 in 2020/21.

Figure 30 - Average Per-hour Budgets, All Documentary Formats, French-language, 2016/17 to 2020/21

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|-----------|-----------|-----------|-----------|-----------|
| Series | \$153,454 | \$151,261 | \$151,434 | \$141,307 | \$153,892 |
| Single-episode/One-off | \$235,757 | \$235,687 | \$214,515 | \$212,973 | \$231,259 |
| Feature-length (film or TV) | \$229,939 | \$312,824 | \$296,879 | \$369,656 | \$398,485 |

Source: CAVCO

Figure 31 - Average Per-hour Budgets, All Documentary Formats, French-language, 2016/17 to 2020/21



Source: CAVCO

Figure 32 - Distribution by Budget Range of Per-hour Budgets, All Documentary Formats, French-language, 2016/17 to 2020/21

| | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 |
|---------------|---------|---------|---------|---------|---------|
| <\$100K | 9% | 13% | 20% | 16% | 20% |
| \$100K-\$249K | 67% | 56% | 48% | 51% | 54% |
| \$250K-\$500K | 22% | 28% | 28% | 26% | 20% |
| >\$500K | 2% | 4% | 3% | 7% | 7% |

Source: CAVCO

Across all formats, the proportion of documentaries with per hour budgets in the \$250K - \$500K range have remained relatively consistent between 2016/17 and 2020/21. Per-hour budgets in the <\$100K range increased from 9% to 20%, while those in the \$100K - \$249K range decreased from 67% to 54%.

The average per hour production budgets of film and television documentaries in the French-language market peaked in 2017/18, at \$177,500. The average fell in 2018/19 to \$160,814. The total average from 2016/17 to 2020/21 was \$164,573.

Figure 33 - Average Per-hour Budgets, Documentary Film and Television, French-language, 2016/17 to 2020/21

| | Average Per-hour Budget |
|----------------------|-------------------------|
| 2016/17 | \$161,433 |
| 2017/18 | \$177,500 |
| 2018/19 | \$160,814 |
| 2019/20 | \$162,289 |
| 2020/21 | \$160,828 |
| Total Average | \$164,573 |

Source: CAVCO

3.3 Summary Findings

Average per-hour production budgets for English-language documentaries fluctuated between 2016/17 and 2020/21. In three out of the five years, single-episode/one-off documentaries had the highest budgets per hour of all English-language formats in different years. In 2020/21, average per-hour production budgets for single-episode/one-off documentaries was \$376,353, followed by feature-length (film or TV) with an average of \$350,556.

Documentary series had significantly lower per-hour budgets, at only \$289,115 in 2020/21. Between 2016/17 and 2020/21, feature-length projects had the highest budgets per hour of all French-language formats with an average of \$398,485 in 2020/21. This was followed by single-episode documentaries, with an average of \$231,259. Similar to English-language productions, series productions had the lowest average per-hour budgets ranging from a low of \$141,307 in 2019/20 to a high of \$153,892 in 2020/21.

4. Financing of Documentary Production

3.1 Overview of Financing

Documentary creators obtain funding from a variety of different sources to finance their projects. Survey responses provided high-level insight into how often documentary creators were able to obtain funding from these different sources. Between 2016/17 and 2020/21, the majority received some form of funding from Canadian broadcasters and broadcast-owned platforms (65%), National Funders (54%), federal tax credits (52%) and provincial tax credits (50%). A large proportion also received funding from the Provincial Funders (48%)


and Arts Councils (36%). A breakdown of the proportion of survey respondents who received funding through funding/investment programs from specific funders is provided below.

Interestingly, 63% of survey respondents indicated that they used personal or self-financing during this period, 17% obtained international funding, and 13% were able to solicit donations or funding through crowdsourcing.

Figure 34 - Proportion of Survey Respondents who Received Funding from Different Funding Organizations between 2016/17 and 2020/21

| Funder Type | Funding Organization | Proportion of survey respondents who received funding |
|---|---|--|
| National Funders (54%) | Canada Media Fund (CMF) | 46% |
| | Telefilm Canada | 26% |
| | National Film Board (NFB) | 20% |
| | | |
| Provincial Funders (48%) | SODEC | 15% |
| | Creative BC | 12% |
| | Ontario Creates | 12% |
| | Yukon Media Development | 3% |
| | Alberta Media Fund | 2% |
| | Manitoba Film and Music | 2% |
| | NB Film, Television & New Media Support Program | 2% |
| | | |
| Canadian broadcaster and broadcast-owned platforms (65%) | Canadian Broadcasting Corporation (CBC) | 37% |
| | Société Radio-Canada | 12% |
| | Other | 12% |
| | Knowledge Network | 9% |
| | TELUS | 8% |
| | TV Ontario (TVO) | 8% |
| | Bell Media - English | 7% |
| | Super channel | 7% |
| | TV5/Unis | 7% |
| | APTN | 5% |
| | Quebecor | 3% |
| | Accessible Media Inc. (AMI) | 3% |
| | Tele-Quebec | 3% |
| | Bell Media - French | 3% |
| | Corus | 3% |
| | Savoir Media | 3% |
| | TFO | 0% |
| | | |
| Arts Councils (36%) | National Arts Councils | 24% |
| | Provincial Arts Councils | 24% |
| | Other | 4% |
| | | |
| Other Funders (12%) | Rogers | 9% |
| | Hot Docs | 5% |
| | Other | 2% |
| | Indigenous Screen Office (ISO) | 0.7% |

Source: DOC Getting Real 7 Survey



Data from CAVCO provided further insight into the amounts of funding being provided to documentary production through various sources. Over this five-year period the largest share of financing came from provincial tax credits (\$196.1 million), followed by the Canada Media Fund (\$169.4 million), Canadian distributors (\$148.2 million), and foreign sources (\$143.5 million).

In 2020/21, provincial tax credits made up almost 20% of total financing, increasing from just under 15% in 2016/17. Foreign sources also saw an increase in its share of total financing,

more than doubling from 7% to almost 16%. While the amount of financing from Canadian distributors, private and public Canadian broadcasters, federal tax credits, and production companies increased between 2016/17 and 2020/21, their share of total financing dropped over the five-year period.

Similarly, although the Canada Media fund continues to provide consistent financing to the industry (approximately \$35 million), its share of total financing also dropped from approximately 17% to 13% between 2016/17 and 2020/21.



Figure 35 - Financing of English-language Documentary Production (All Formats): 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|-------|---------|-------|---------|-------|---------|-------|---------|-------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 21.9 | 12.1% | 25.9 | 11.8% | 25.2 | 9.2% | 28.7 | 14.7% | 25.4 | 10.9% |
| Public Canadian broadcaster | 14.3 | 7.9% | 19.2 | 8.7% | 17.4 | 6.3% | 11.2 | 5.7% | 17.5 | 7.5% |
| Federal tax credit | 17.4 | 9.7% | 22.2 | 10.1% | 27.8 | 10.1% | 18.6 | 9.5% | 21.8 | 9.3% |
| Provincial tax credit | 26.6 | 14.7% | 38.3 | 17.3% | 49.9 | 18.2% | 35.9 | 18.4% | 45.4 | 19.5% |
| Production company | 4.1 | 2.3% | 6.4 | 2.9% | 7.2 | 2.6% | 4.3 | 2.2% | 3.4 | %1.5 |
| Canadian distributor | 32.8 | 18.2% | 27.8 | 12.6% | 29.9 | 10.9% | 21.6 | 11.1% | 36.2 | %15.5 |
| Foreign | 12.6 | 7.0% | 23.9 | 10.8% | 48.3 | 17.6% | 22.1 | 11.4% | 36.7 | 15.7% |
| Canada Media Fund | 30.5 | 16.9% | 33.3 | 15.1% | 40.8 | 14.9% | 34.4 | 17.6% | 30.4 | 13.0% |
| Other public* | 10.8 | 6.0% | 12.6 | 5.7% | 13.0 | 4.7% | 9.6 | 4.9% | 8.5 | 3.6% |
| Other private** | 9.6 | 5.3% | 11.2 | 5.1% | 15.3 | 5.6% | 8.8 | 4.5% | 7.9 | 3.4% |
| Total | 180.5 | 100% | 220.7 | 100% | 274.8 | 100% | 195.0 | 100% | 233.2 | 100% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Overall financing of English-language documentary treaty coproductions fluctuated between 2016/17 and 2020/21, peaking in 2018/19 at \$24.8 million. Foreign sources contributed the highest share of financing (27.9%) over this

five-year period, followed by provincial tax credits (17.8%) and the Canada Media Fund (15.1%). In 2020/21, foreign sources made up over half of financing of English-language documentary coproduction.

Figure 36 - Financing of English-language Documentary Treaty Coproduction: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|-------|---------|-------|---------|-------|---------|-------|---------|-------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 1.0 | 7.0% | 0.2 | 1.4% | 0.4 | 1.4% | 0.1 | 1.0% | 0.5 | 3.4% |
| Public Canadian broadcaster | 2.7 | 20.0% | 1.0 | 9.4% | 1.9 | 7.8% | 0.7 | 8.5% | 0.6 | 4.5% |
| Federal tax credit | 1.4 | 10.0% | 0.9 | 8.7% | 2.6 | 10.6% | 0.8 | 10.3% | 1.0 | 6.9% |
| Provincial tax credit | 2.0 | 15.0% | 2.2 | 20.1% | 4.9 | 19.7% | 1.7 | 21.7% | 1.8 | 12.3% |
| Production company | 0.4 | 3.0% | 0.5 | 5.1% | 0.7 | 2.9% | 0.3 | 4.4% | 0.2 | %1.5 |
| Canadian distributor | 0.3 | 2.0% | 0.7 | 6.7% | 3.1 | 12.5% | 0.3 | 4.3% | 0.6 | 4.5% |
| Foreign | 0.8 | 6.0% | 2.4 | 22.5% | 7.0 | 28.4% | 2.4 | 30.9% | 7.4 | 51.6% |
| Canada Media Fund | 3.9 | 29.0% | 1.3 | 11.7% | 2.6 | 10.3% | 0.8 | 10.7% | 1.9 | 13.6% |
| Other public* | 0.8 | 6.0% | 1.5 | 14.0% | 0.5 | 1.9% | 0.2 | 2.0% | 0.0 | 0.0% |
| Other private** | 0.4 | 3.0% | 0.1 | 0.5% | 1.0 | 4.2% | 0.5 | 6.1% | 0.2 | 1.3% |
| Total | 13.6 | 100% | 10.7 | 100% | 24.8 | 100% | 7.6 | 100% | 14.3 | 100% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Despite fluctuations in financing between 2016/17 and 2017/18, the overall financing for all formats of French-language documentary production has increased from \$76.2 million to \$101 million. Over the five-year period, the largest share of financing came from private Canadian broadcasters (21.7%), followed by the Canada Media Fund (19%) and provincial tax

credits (17.2%). Notably, there is considerably less (or close to no) funding from foreign sources and Canadian distributors for French documentary productions. Because broadcasters typically want French documentary productions to remain highly localized, it is challenging for them to sell their content internationally.

Figure 37 - Financing of French-language Documentary Production (All Formats): 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|-------|---------|-------|---------|-------|---------|-------|---------|-------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 18.8 | 24.7% | 5.7 | 10.0% | 10.6 | 17.8 | 20.0 | 26.6% | 29.9 | 29.6% |
| Public Canadian broadcaster | 10.1 | 13.2% | 11.8 | 20.8% | 11.2 | 18.9% | 10.2 | 13.6% | 13.0 | 12.9% |
| Federal tax credit | 8.2 | 10.8% | 5.9 | 10.5% | 6.3 | 10.6% | 8.3 | 11.1% | 10.8 | 10.7% |
| Provincial tax credit | 12.9 | 16.9% | 10.0 | 17.6% | 10.5 | 17.7% | 13.3 | 17.6% | 16.5 | 16.3% |
| Production company | 2.6 | 3.4% | 2.2 | 3.8% | 2.5 | 4.2% | 2.4 | 3.2% | 2.0 | 1.9% |
| Canadian distributor | 0.6 | 0.7% | 0.8 | 1.4% | 0.7 | 1.2% | 2.1 | 2.8% | 2.8 | 2.8% |
| Foreign | 0.2 | 0.3% | 3.8 | 6.7% | 0.2 | 0.3% | 1.3 | 1.7% | 0.0 | 0.0% |
| Canada Media Fund | 16.9 | 22.1% | 10.6 | 18.6% | 12.1 | 20.3% | 12.3 | 16.4% | 17.4 | 17.2% |
| Other public* | 3.9 | 5.2% | 4.1 | 7.2% | 4.5 | 7.6% | 4.2 | 5.6% | 6.9 | 6.8% |
| Other private** | 2.0 | 2.6% | 1.9 | 3.4% | 0.8 | 1.4% | 1.0 | 1.3% | 1.8 | 1.8% |
| Total | 76.2 | 100% | 56.7 | 100% | 59.4 | 100% | 75.1 | 100% | 101.0 | 100% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Overall financing of French-language feature-length documentary treaty coproductions have sharply declined, more than halving between 2016/17 and 2020/21. Contributions declined 57% in the five-year period. For French

feature-length documentary coproductions, Canadian public broadcaster sources (22.8%) contributed the largest share of financing, followed by the Canada Media Fund (21.2%) and provincial tax credits (17.9%).

Figure 38 - Financing of French-language Documentary Treaty Coproduction: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|-------|---------|-------|---------|------|---------|------|---------|------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 0.0 | 0.0% | 0.0 | 0.0% | 0.1 | 7% | 0.2 | 7% | 0.3 | 29% |
| Public Canadian broadcaster | 0.8 | 28.0% | 2.1 | 30.3% | 0.4 | 37% | 0.2 | 6% | 0.2 | 13% |
| Federal tax credit | 0.3 | 11.0% | 0.8 | 11.8% | 0.1 | 12% | 0.4 | 12% | 0.1 | 12% |
| Provincial tax credit | 0.5 | 19.0% | 1.5 | 21.1% | 0.2 | 19% | 0.5 | 17% | 0.2 | 14% |
| Production company | 0.2 | 8.0% | 0.3 | 4.9% | 0.0 | 3% | 0.2 | 7% | 0.0 | 3% |
| Canadian distributor | 0.0 | 0.0% | 0.5 | 7.1% | 0.1 | 5% | 0.2 | 6% | 0.0 | 0% |
| Foreign | 0.03 | 0.1% | 0.1 | 1.9% | 0.0 | 4% | 0.8 | 27% | 0.0 | 1% |
| Canada Media Fund | 0.7 | 26.0% | 1.5 | 21.0% | 0.1 | 13% | 0.5 | 18% | 0.3 | 28% |
| Other public* | 0.1 | 4.0% | 0.0 | 0.0% | 0.0 | 2% | 0.0 | 0% | 0.0 | 0% |
| Other private** | 0.1 | 3.0% | 0.1 | 2.0% | 0.0 | 0% | 0.0 | 0% | 0.0 | 0% |
| Total | 2.8 | 100% | 7.0 | 100% | 1.2 | 100% | 3.1 | 100% | 1.2 | 100% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Following a decline in 2018/19, the median broadcast license fees paid per hour for English-language documentary series has been trending upward since 2019/20. Median broadcast

license fees for single-episode/one-off and feature-length (film or TV) documentaries have declined drastically between 2016/17 and 2020/21.

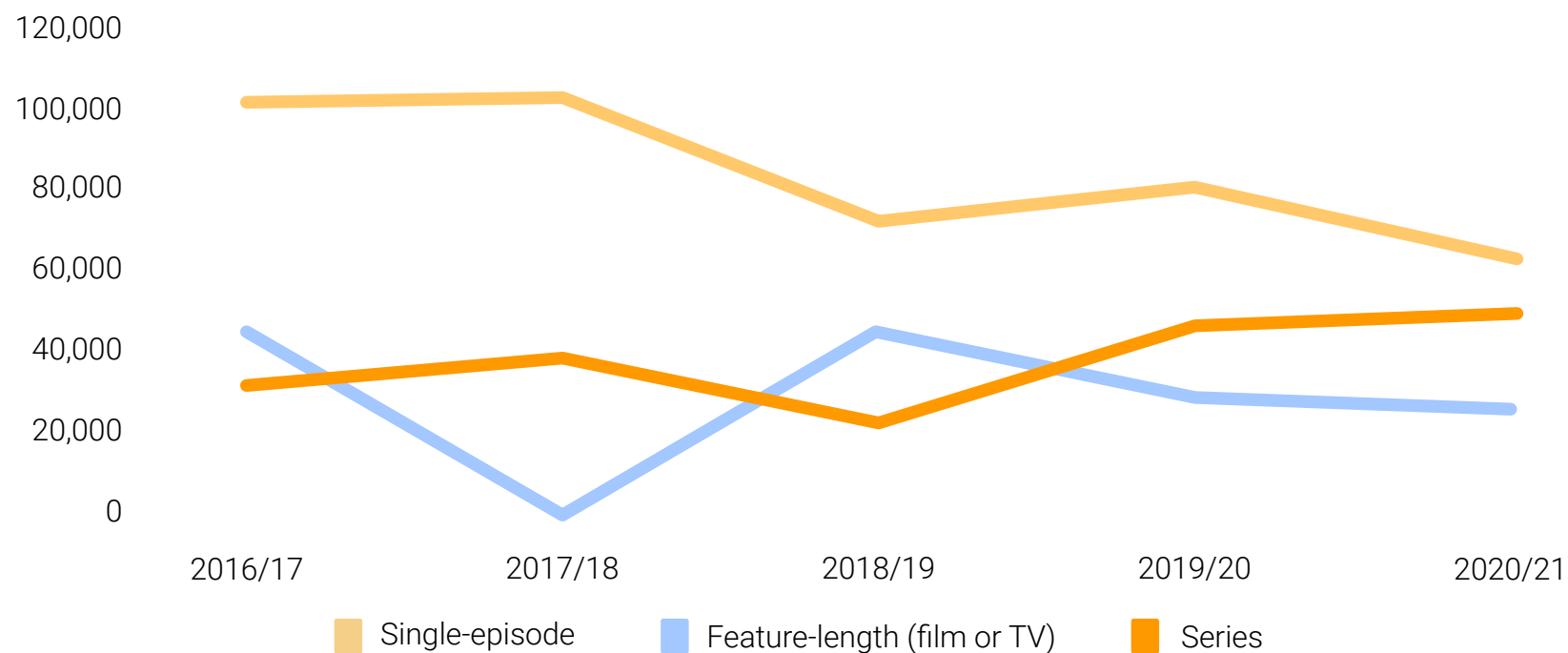
Figure 39 - Documentary Median License Fees Per-hour by Format, English-language

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|-----------------------------|---------|--------------------|---------|-----------|---------|
| Feature-length (film or TV) | 46,429 | 3,333 [†] | 47,150 | 30,667 | 27,632 |
| Single-episode/One-off | 100,000 | 102,000 | 73,132 | 80,400 | 62,967 |
| Series | 35,554 | 38,652 | 28,796 | 40,046 | 42,500 |

Source: CAVCO

[†] Very low median licence fee due to the large share of feature-length projects with \$0 broadcaster licence fees in 2017/18.

Figure 40 - Documentary Median License Fees Per-hour by Format, English-language



Source: CAVCO

For all formats of French-language documentaries, the median license fee per-hour has increased since 2019/20 following a decline.

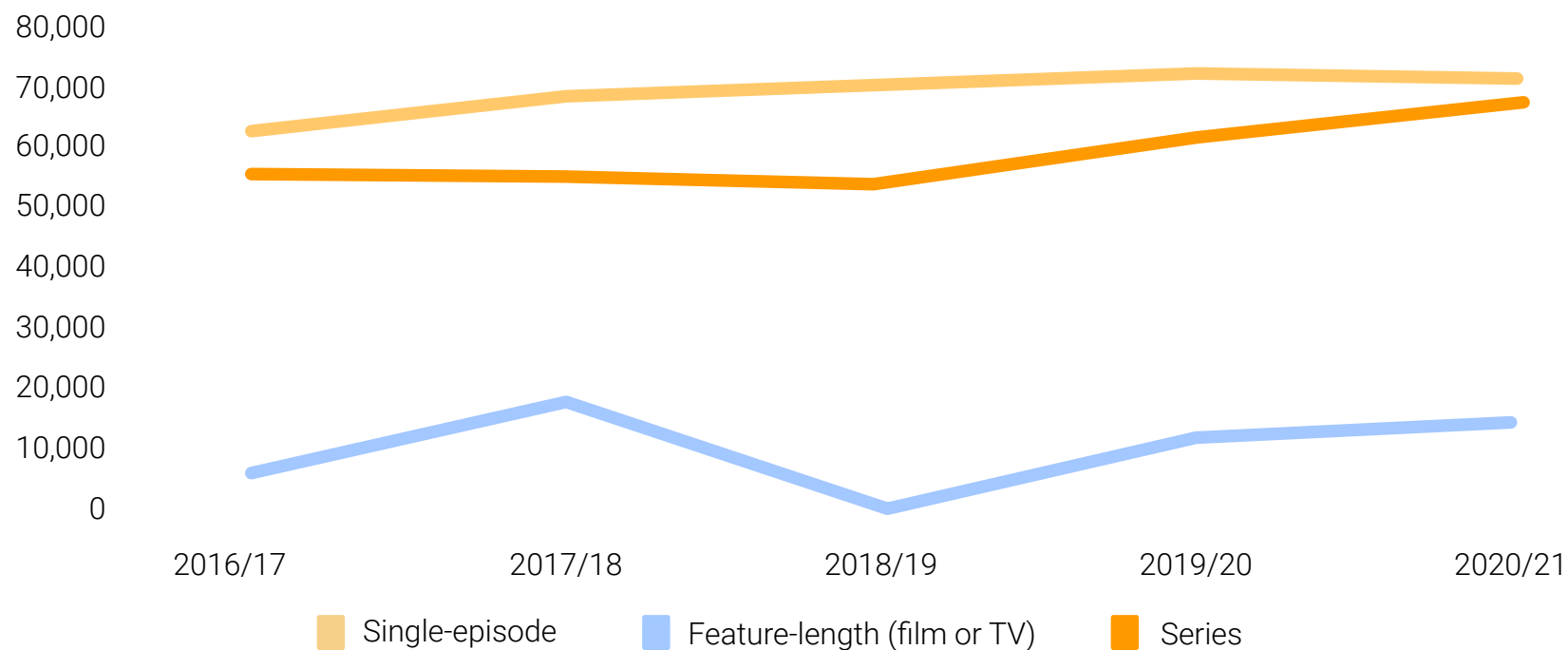
Figure 41 - Documentary Median License Fees Per-hour by Format, French-language

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|------------------------------------|---------|---------|----------------|-----------|---------|
| Feature-length (film or TV) | 7,500 | 18,726 | 0 [†] | 9,512 | 11,000 |
| Single-episode/One-off | 63,361 | 68,865 | 70,000 | 71,940 | 72,384 |
| Series | 56,514 | 56,500 | 56,431 | 63,477 | 69,188 |

Source: CAVCO

[†] Very low median licence fee due to the large share of feature-length projects with \$0 broadcaster licence fees in 2017/18.

Figure 42 - Documentary Median License Fees Per-hour by Format, French-language



Source: CAVCO

The total financing contribution of federal and provincial tax credits fluctuated over the five-year period. Between 2016/18 and 2020/21, provincial tax credits accounted for the larger

share, making up between 61% and 66% of total tax credits. These trends remain true across the English-language and French-language markets (Figures 44 and 45).

Figure 43 - Total Contributions of Producer Tax Credits (\$ millions)

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|------------------------------------|---------|------|---------|------|---------|------|---------|------|---------|------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Total federal tax credit | 25.7 | 39% | 28.1 | 37% | 34.1 | 36% | 26.9 | 35% | 32.6 | 34% |
| Total provincial tax credit | 39.5 | 61% | 48.3 | 63% | 60.4 | 64% | 49.1 | 65% | 61.9 | 66% |
| Combined financing | 65.2 | 100% | 76.4 | 100% | 94.5 | 100% | 76.0 | 100% | 94.5 | 100% |

Source: Nordicity estimates based on data from CAVCO

Figure 44 - Total Contributions of Producer Tax Credits English-language (\$ millions)

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|------------------------------------|---------|------|---------|------|---------|------|---------|------|---------|------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Total federal tax credit | 17.4 | 40% | 22.2 | 37% | 27.8 | 36% | 18.6 | 34% | 21.8 | 32% |
| Total provincial tax credit | 26.6 | 60% | 38.3 | 63% | 49.9 | 64% | 35.9 | 66% | 45.4 | 68% |
| Combined financing | 44.0 | 100% | 60.5 | 100% | 77.7 | 100% | 54.5 | 100% | 67.2 | 100% |

Source: Nordicity estimates based on data from CAVCO

Figure 45 - Total Contributions of Producer Tax Credits French-language (\$ millions)

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|------------------------------------|---------|------|---------|------|---------|------|---------|------|---------|------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Total federal tax credit | 8.2 | 39% | 5.9 | 37% | 6.3 | 38% | 8.3 | 39% | 10.8 | 40% |
| Total provincial tax credit | 12.9 | 61% | 10.0 | 63% | 10.5 | 62% | 13.3 | 61% | 16.5 | 60% |
| Combined financing | 21.1 | 100% | 15.9 | 100% | 16.8 | 100% | 21.6 | 100% | 27.3 | 100% |

Source: Nordicity estimates based on data from CAVCO

4.2 Feature-length (film or TV) Documentaries

Figure 46 - Financing for English-language Feature-length (film or TV) Documentary Production: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|--------|---------|--------|---------|--------|---------|-------|---------|--------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 2.1 | 8.8% | 0.7 | 3.2% | 1.4 | 4.6% | 0.4 | 2.1% | 1.2 | 8.5% |
| Public Canadian broadcaster | 0.9 | 3.9% | 1.0 | 4.4% | 1.9 | 6.0% | 1.5 | 7.6% | 0.4 | 2.8% |
| Federal tax credit | 2.0 | 8.3% | 1.6 | 7.2% | 2.6 | 8.4% | 0.9 | 4.8% | 1.4 | 9.9% |
| Provincial tax credit | 3.7 | 15.1% | 3.3 | 14.9% | 5.2 | 17.1% | 1.9 | 9.9% | 2.5 | 18.0% |
| Production company | 1.1 | 4.6% | 1.7 | 7.5% | 2.2 | 7.1% | 0.5 | 2.7% | 0.2 | 1.4% |
| Canadian distributor | 2.5 | 10.2% | 2.8 | 12.6% | 1.9 | 6.0% | 0.4 | 2.1% | 3.4 | 24.6% |
| Foreign | 1.1 | 4.4% | 1.1 | 4.9% | 2.0 | 6.4% | 0.2 | 1.2% | 0.3 | 2.0% |
| Canada Media Fund | 4.8 | 19.6% | 2.9 | 13.3% | 5.2 | 16.8% | 3.1 | 16.1% | 2.3 | 16.2% |
| Other public* | 3.3 | 13.7% | 4.8 | 21.6% | 4.7 | 15.4% | 1.9 | 9.7% | 0.6 | 4.3% |
| Other private** | 2.8 | 11.4% | 2.3 | 10.2% | 3.7 | 12.1% | 1.8 | 9.2% | 1.7 | 12.3% |
| Total | 24.3 | 100.0% | 22.1 | 100.0% | 30.8 | 100.0% | 19.3 | 65.2% | 13.9 | 100.0% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

4.2 Feature-length (film or TV) Documentaries

Figure 47 - Financing of French-language Feature-length (film or TV) Documentary Production: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|--------|---------|--------|---------|--------|---------|--------|---------|--------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 0.2 | 3.0% | 0.1 | 1.1% | 0.0 | 0.5% | 0.1 | 1.1% | 0.4 | 6.6% |
| Public Canadian broadcaster | 0.6 | 10.5% | 0.4 | 6.7% | 0.7 | 9.6% | 0.5 | 5.6% | 0.0 | 0.0% |
| Federal tax credit | 0.4 | 7.7% | 0.4 | 5.4% | 0.4 | 5.5% | 0.8 | 9.1% | 0.5 | 8.5% |
| Provincial tax credit | 0.9 | 17.6% | 1.3 | 19.5% | 1.3 | 18.7% | 2.6 | 29.4% | 1.4 | 24.8% |
| Production company | 0.5 | 9.1% | 0.7 | 10.2% | 0.9 | 12.8% | 0.7 | 7.7% | 0.1 | 2.5% |
| Canadian distributor | 0.4 | 6.6% | 0.5 | 7.7% | 0.4 | 5.2% | 2.5 | 28.6% | 1.4 | 25.8% |
| Foreign | 0.0 | 0.9% | 0.0 | 0.2% | 0.0 | 0.7% | 0.0 | 0.1% | 0.0 | 0.0% |
| Canada Media Fund | 0.6 | 10.8% | 0.2 | 2.5% | 0.4 | 6.1% | 0.2 | 2.4% | 0.3 | 4.8% |
| Other public* | 1.2 | 23.5% | 2.6 | 38.6% | 2.5 | 36.8% | 3.4 | 39.5% | 0.9 | 16.7% |
| Other private** | 0.6 | 10.4% | 0.5 | 8.1% | 0.3 | 4.1% | 0.6 | 6.3% | 0.6 | 10.3% |
| Total | 5.3 | 100.0% | 6.7 | 100.0% | 6.9 | 100.0% | 8.7 | 129.7% | 5.5 | 100.0% |


Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

4.3 Single-episode/One-off Documentaries

Overall, financing for single-episode/one-off documentaries has decreased between 2016/17 and 2020/21, falling from \$50.3 million to \$30 million. The most significant portion of financing came from the Canada Media Fund and provincial tax credits. Financing from private Canadian broadcasters decreased by roughly 70% in the five-year period.



Plastic People
Directors: Ben Addelman and Ziya Tang
Courtesy of: Plastic People Documentary Productions Inc.

Figure 48 - Financing for English-language Single-episode/One-off Documentary Production: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|------------------------------|---------|---------|---------|--------|---------|--------|---------|--------|---------|--------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 6.3 | 12.6% | 5.6 | 10.0% | 4.9 | 7.9% | 4.1 | 8.2% | 1.9 | 6.2% |
| Public Canadian broadcaster | 5.8 | 11.4% | 6.9 | 12.4% | 6.4 | 10.4% | 5.3 | 10.6% | 3.4 | 11.2% |
| Federal tax credit | 4.8 | 9.6% | 5.2 | 9.4% | 6.0 | 9.8% | 4.5 | 9.0% | 2.7 | 8.8% |
| Provincial tax credit | 9.2 | 18.3% | 8.9 | 16.0% | 9.8 | 15.9% | 8.3 | 16.5% | 5.0 | 16.5% |
| Production company | 1.5 | 2.9% | 1.5 | 2.7% | 2.0 | 3.3% | 1.8 | 3.6% | 0.9 | 2.9% |
| Canadian distributor | 3.0 | 6.0% | 3.1 | 5.6% | 4.5 | 7.3% | 4.7 | 9.4% | 1.9 | 6.2% |
| Foreign | 3.2 | 6.4% | 3.3 | 6.0% | 4.3 | 7.0% | 2.9 | 5.9% | 2.2 | 7.4% |
| Canada Media Fund | 12.1 | 24.1% | 12.3 | 22.0% | 14.8 | 24.1% | 14.5 | 29.0% | 9.0 | 30.0% |
| Other public* | 2.3 | 4.5% | 4.1 | 7.3% | 3.7 | 6.0% | 2.5 | 5.0% | 1.8 | 5.9% |
| Other private** | 2.1 | 4.1% | 4.8 | 8.6% | 5.1 | 8.3% | 1.4 | 2.7% | 1.5 | 4.9% |
| Total | 50.3 | 100.00% | 55.7 | 100.0% | 61.4 | 100.0% | 50.1 | 100.0% | 30.0 | 100.0% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Overall financing for French-language single-episode/one-off documentary production decreased from \$18.4 million to \$14.9 million from 2016/17 to 2020/21. The most significant

portions of financing in the examined period came from public Canadian broadcasters, the Canada Media Fund, and provincial tax credits.

Figure 49 - Financing of French-language Single-episode/One-off Documentary Production: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|--------|---------|--------|---------|--------|---------|--------|---------|--------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 2.2 | 11.8% | 0.8 | 5.4% | 1.6 | 10.0% | 1.6 | 13.7% | 1.6 | 10.8% |
| Public Canadian broadcaster | 3.2 | 17.5% | 3.7 | 24.8% | 3.5 | 22.7% | 2.8 | 24.0% | 3.4 | 22.9% |
| Federal tax credit | 1.9 | 10.2% | 1.5 | 9.8% | 1.6 | 10.0% | 1.3 | 10.7% | 1.5 | 10.2% |
| Provincial tax credit | 3.6 | 19.4% | 3.0 | 20.2% | 2.9 | 18.7% | 2.5 | 21.6% | 2.8 | 18.5% |
| Production company | 0.7 | 3.9% | 0.5 | 3.4% | 0.5 | 3.0% | 0.4 | 3.0% | 0.5 | 3.4% |
| Canadian distributor | 0.1 | 0.3% | 0.0 | 0.3% | 0.2 | 1.1% | 0.1 | 0.7% | 0.0 | 0.2% |
| Foreign | 0.1 | 0.7% | 0.0 | 0.0% | 0.0 | 0.1% | 0.0 | 0.0% | 0.0 | 0.1% |
| Canada Media Fund | 4.5 | 24.4% | 3.1 | 20.4% | 3.5 | 22.2% | 2.4 | 20.4% | 3.5 | 23.4% |
| Other public* | 1.6 | 8.7% | 1.2 | 7.8% | 1.8 | 11.2% | 0.5 | 4.1% | 1.4 | 9.2% |
| Other private** | 0.6 | 3.0% | 1.2 | 7.8% | 0.2 | 1.1% | 0.2 | 1.7% | 0.2 | 1.4% |
| Total | 18.4 | 100.0% | 15.1 | 100.0% | 15.6 | 100.0% | 11.8 | 100.0% | 14.9 | 100.0% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

License fees among English-language single-episode/one-off documentaries were concentrated among productions with budgets between \$100,000 and \$500,000. The distribution of license fees among productions with budgets under \$100,000

has decreased from 2016/17 to 2020/21. In this five-year period, a little over a quarter of license fees were distributed to productions with budgets over \$500,000.

Figure 50 - Distribution of English-language Single-episode/One-off Documentary License Fees by Budget Range (per hour)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|---------------|---------|---------|---------|-----------|---------|
| <\$100K | 12.2% | 11.5% | 6.9% | 4.4% | 8.6% |
| \$100K-\$249K | 23.5% | 20.4% | 29.2% | 27.2% | 30.0% |
| \$250K-\$500K | 40.9% | 31.9% | 33.8% | 38.6% | 38.6% |
| >\$500K | 23.5% | 36.3% | 30.0% | 29.8% | 22.9% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: CAVCO

Regarding French language single-episode/ or one-off documentaries and feature length (film or TV) documentaries, license fees are mostly concentrated among productions

with budgets in the \$100,000 to \$500,000 range. License fees among productions with budgets below \$100,000 have declined from 4.8% in 2016/17 to 1.3% in 2020/21.

Figure 51 - Distribution of French-language Single-episode/One-off + Feature-length (film or TV) Documentary License Fees (per hour)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|---------------|---------|---------|---------|-----------|---------|
| <\$100K | 4.8% | 2.0% | 6.3% | 4.3% | 1.3% |
| \$100K-\$249K | 47.3% | 62.8% | 54.2% | 59.0% | 68.0% |
| \$250K-\$500K | 42.9% | 30.2% | 34.9% | 22.4% | 26.1% |
| >\$500K | 5.0% | 5.0% | 4.5% | 14.3% | 4.5% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: CAVCO



4.4 Documentary Series

With the exception of a significant dip in 2019/20, financing for English-language documentary series production has grown steadily between 2016/17 and 2020/21. While 2019/20 saw funding drop to pre-2017/18 levels, it rebounded significantly in 2020/21, returning to slightly higher than the 2018/19 total. Provincial tax credits have consistently been the highest or

one of the highest sources of funding across the entire time period, with Canadian distributors and private Canadian broadcasters both also contributing a significant share. Foreign investment has fluctuated, but has overall been higher in recent years.

Figure 52 - Financing for English-language Documentary Series Production: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|--------|---------|--------|---------|--------|---------|--------|---------|--------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 13.0 | 12.6% | 19.6 | 13.7% | 19.2 | 10.4% | 24.2 | 19.2% | 22.5 | 11.9% |
| Public Canadian broadcaster | 7.4 | 7.2% | 11.3 | 7.9% | 9.2 | 5.0% | 4.3 | 3.4% | 13.7 | 7.2% |
| Federal tax credit | 10.3 | 10.0% | 15.4 | 10.8% | 19.4 | 10.5% | 12.7 | 10.0% | 17.8 | 9.4% |
| Provincial tax credit | 13.5 | 13.1% | 26.0 | 18.2% | 35.4 | 19.2% | 24.8 | 19.6% | 38.1 | 20.1% |
| Production company | 1.5 | 1.5% | 3.2 | 2.2% | 3.0 | 1.6% | 1.6 | 1.3% | 2.3 | 1.2% |
| Canadian distributor | 25.9 | 25.2% | 21.9 | 15.3% | 23.9 | 12.9% | 16.3 | 12.9% | 31.2 | 16.4% |
| Foreign | 8.0 | 7.7% | 19.5 | 13.6% | 42.7 | 23.1% | 19.1 | 15.1% | 34.3 | 18.1% |
| Canada Media Fund | 13.6 | 24.4% | 18.0 | 12.6% | 20.9 | 22.2% | 2.4 | 20.4% | 3.5 | 23.4% |
| Other public* | 5.1 | 8.7% | 3.8 | 2.6% | 4.7 | 11.2% | 0.5 | 4.1% | 1.4 | 9.2% |
| Other private** | 4.7 | 3.0% | 4.2 | 2.9% | 6.6 | 1.1% | 0.2 | 1.7% | 0.2 | 1.4% |
| Total | 102.8 | 100.0% | 142.8 | 100.0% | 185.0 | 100.0% | 11.8 | 100.0% | 14.9 | 100.0% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Financing of French-language documentary series production has been climbing steadily since 2016/17, and saw a significant jump in 2020/21. Unlike English-language series, there was no decline in 2019/20. Private Canadian broadcasters were

generally the largest source of financing for French-language series, with the Canada Media Fund and provincial tax credits both also making significant contributions.

Figure 53 - Financing of French-language Documentary Series Production: 2016/17 to 2020/21

| | 2016/17 | | 2017/18 | | 2018/19 | | 2019/20 | | 2020/21 | |
|-------------------------------------|---------|--------|---------|--------|---------|--------|---------|--------|---------|--------|
| | \$M | % | \$M | % | \$M | % | \$M | % | \$M | % |
| Private Canadian broadcaster | 16.4 | 31.6% | 4.7 | 13.5% | 8.9 | 24.2% | 18.2 | 33.8% | 27.8 | 34.5% |
| Public Canadian broadcaster | 6.2 | 12.0% | 7.6 | 21.8% | 7.0 | 19.1% | 6.8 | 12.7% | 9.6 | 11.9% |
| Federal tax credit | 5.9 | 11.4% | 4.1 | 11.7% | 4.3 | 11.8% | 6.4 | 11.8% | 8.8 | 10.9% |
| Provincial tax credit | 8.3 | 15.9% | 5.7 | 16.2% | 6.3 | 17.1% | 8.6 | 16.0% | 12.4 | 15.4% |
| Production company | 1.4 | 2.6% | 1.0 | 2.8% | 1.2 | 3.2% | 1.5 | 2.7% | 1.3 | 1.6% |
| Canadian distributor | 0.1 | 0.3% | 0.2 | 0.7% | 0.2 | 0.5% | 0.1 | 0.1% | 1.4 | 1.7% |
| Foreign | 0.0 | 0.0% | 3.7 | 10.6% | 0.1 | 0.3% | 1.3 | 2.3% | 0.0 | 0.0% |
| Canada Media Fund | 11.7 | 22.5% | 7.3 | 20.9% | 8.2 | 22.2% | 9.7 | 18.0% | 13.7 | 16.9% |
| Other public* | 1.0 | 2.0% | 0.4 | 1.1% | 0.2 | 0.6% | 1.0 | 1.8% | 4.6 | 5.7% |
| Other private** | 0.9 | 1.7% | 0.3 | 0.8% | 0.4 | 1.1% | 0.3 | 0.6% | 1.0 | 1.3% |
| Total | 51.9 | 100.0% | 34.9 | 100.0% | 36.9 | 100.0% | 53.7 | 100.0% | 80.6 | 100.0% |

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

The majority of English-language documentary series license fees were concentrated in the \$100K-\$500K/hour budget range, with the majority going attributable to productions with hourly budgets between \$100K-\$250K. Small productions with

hourly budgets under \$100K made up the smallest share of license fees. Share of license fees dropped between 2019/20 and 2020/21 for all budget ranges except \$100K-\$250K, which increased by over half between the two years.

Figure 54 - Distribution of English-language Documentary Series License Fees by Budget Range (per hour)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|----------------------|---------|---------|---------|-----------|---------|
| <\$100K | 9.5% | 13.8% | 12.8% | 10.9% | 5.7% |
| \$100K-\$249K | 44.6% | 41.3% | 39.5% | 34.4% | 56.3% |
| \$250K-\$500K | 29.7% | 28.8% | 26.7% | 32.8% | 27.6% |
| >\$500K | 16.2% | 16.3% | 20.9% | 21.9% | 10.3% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: CAVCO

As with the English-language documentary series, French-language documentary series license fees were also mostly distributed within the \$100K-\$500K/hour range, with a higher percentage attributable to productions with hourly budgets within the \$100K-\$250K/hour range. However, a higher

percentage of license fees were attributable to French-language productions with hourly budgets over \$500K compared to English-language productions in the same budget range, and a lower percentage was attributable to productions under \$100K.

Figure 55 - Distribution of French-language Documentary Series License Fees by Budget Range (per hour)

| | 2016/17 | 2017/18 | 2018/19 | 2019/2020 | 2020/21 |
|----------------------|---------|---------|---------|-----------|---------|
| <\$100K | 5.6% | 10.5% | 9.3% | 3.0% | 4.9% |
| \$100K-\$249K | 32.1% | 37.7% | 37.4% | 51.9% | 42.2% |
| \$250K-\$500K | 34.9% | 30.8% | 20.1% | 28.2% | 24.7% |
| >\$500K | 27.4% | 21.0% | 33.2% | 16.8% | 28.2% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: CAVCO

4.5 Summary Findings

Data from CAVCO suggests that between 2016/17 and 2020/21 the largest share of financing came from provincial tax credits (\$196.1 million), followed by the Canada Media Fund (\$169.4 million), Canadian distributors (\$148.2 million), and foreign sources (\$143.5 million).

In 2020/21, provincial tax credits made up almost 20% of total financing, increasing from just under 15% in 2016/17. Foreign sources also saw an increase in its share of total financing, more than doubling from 7% to almost 16%. While the amount of financing from Canadian distributors, private and public Canadian broadcasters, federal tax credits, and production companies increased between 2016/17 and 2020/21, their share of total financing dropped over the five-year period. Similarly, although the Canada Media fund continues to provide consistent financing to the industry (approximately

\$35 million), its share of total financing also dropped from approximately 17% to 13% between 2016/17 and 2020/21.

Interestingly, despite fluctuations in financing between 2016/17 and 2017/18, the overall financing for all formats of French-language documentary production has increased from \$76.2 million to \$101 million. Over the five-year period, the largest share of financing came from private Canadian broadcasters (21.7%), followed by the Canada Media Fund (19%) and provincial tax credits (17.2%). Notably, there is considerably less (or close to no) funding from foreign sources and Canadian distributors for French documentary productions. Because broadcasters typically want French documentary productions to remain highly localized, it is challenging for them to sell their content internationally.



5. Audiences for Canadian Documentaries

Viewership of Canadian documentaries has been on the rise for several years, and boomed during the COVID-19 pandemic lockdowns as people sought out new forms of entertainment.

Interviewees provided further context into how audience preferences and viewership changed in the last few years. They mentioned growing engagement with true crime content, and dramatic or escapist productions, the impacts of which are still being felt throughout the industry in terms of what projects are being greenlit. They also referred to major sociopolitical shifts during the years of COVID. Some people's sensibilities and interests changed, bringing an increased level of engagement with content about systemic discrimination and other social issues. Interviewees referred to Canada's racial reckoning, triggered by the murder of George Floyd on May 25th 2020. Throughout 2020, protests and outrage over the treatment of Black and racialized individuals in addition to longstanding anger over Canada's treatment of Indigenous peoples led to

a period of reckoning across Canada's screen sector. Issues stemming from racial inequity and injustice were amplified by many different organizations, both new and established. Many entities underwent a period of reassessment in order to implement changes that acknowledge Canada's ongoing genocide against Indigenous peoples, anti-Blackness, racism, transphobia and homophobia, ableism, and other forms of discrimination across the sector and this had an impact over what content was produced and how audiences consumed content that addressed these issues.

Lockdowns and a desire for new content also meant that more international audiences were engaging with Canadian content. The emphasis on streaming and the diversification of streaming platforms further supported this renewed interest, leading the documentary sector into what one interviewee referred to as a renaissance for the genre. All in all, several producers went as far as to say that the pandemic years were



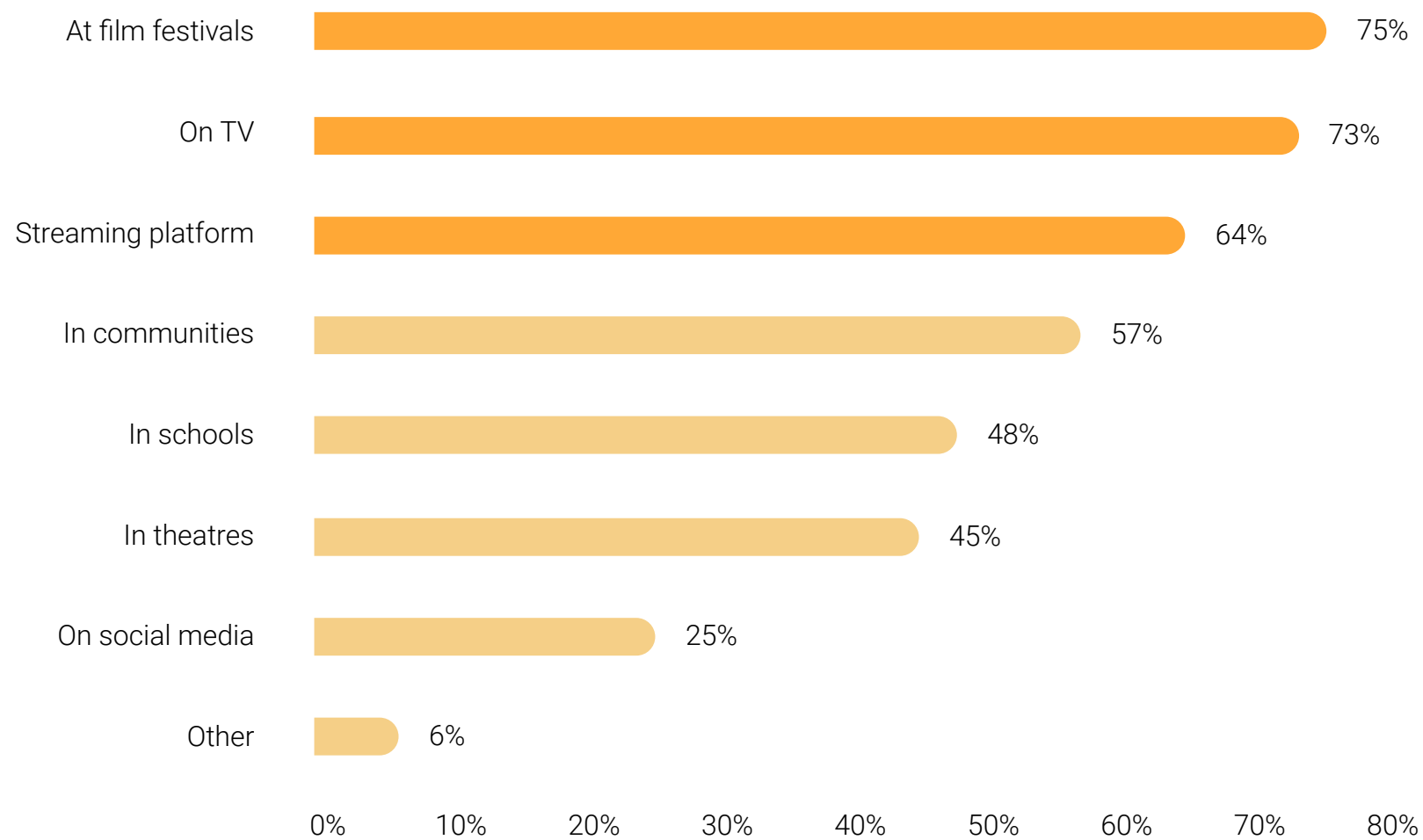
some of the best of their careers, from a business perspective (particularly for those who were able to access CMF funding or CERB). Interestingly, viewership in 2021 (after many pandemic-related restrictions had begun being lifted) was still much higher than it had been in 2019.

Audiences are watching Canadian documentaries on a variety of platforms. Based on survey results, the most popular mediums through which participants show their documentaries include film festivals (75%), on television

(73%), streaming platforms (64%) and in communities (57%). Other places where projects were shown include on media websites, while others indicated their projects are yet to be publicly screened. In addition, 81% of documentary projects were shown at more than one location or platform.

Common combinations include showing on TV & streaming platforms; TV, streaming platforms & in schools; TV, streaming platforms, schools & communities; and TV, streaming platforms, schools, communities & film festivals.

Figure 56 - Where were your projects shown? n=143



Source: DOC Getting Real 7 Survey

5.1 Television Audiences

According to data provided to Nordicity by the CRTC, Canadians spend a significant amount of time watching Canadian long-form documentaries on television, particularly in the English-language market. In 2018, Canadians watched 10.5 million hours of Canadian English-language long-form documentaries¹³, and 3.3 million hours of Canadian French-language long-form documentaries.

Both languages reached their height in 2020, with French-language viewing hours increasing by over half between 2019

and 2020. These numbers declined slightly in 2021, but have remained higher than in 2018 or 2019, at 11.2 million hours for English-language documentaries, and 5.1 million hours for French-language documentaries.

In contrast, in 2018, Canadians watched 28.8 million hours of Canadian English-language drama and comedy, rising to 29.0 million hours by 2021, and 18.7 million hours of Canadian French-language drama and comedy, dropping to 17.4 by 2021.



Figure 57 - Average weekly viewing hours (million) for Canadian long-form documentaries by Canadian television services, by language market, 2018-2021

| | 2018 | 2019 | 2020 | 2021 |
|---------|------|------|------|------|
| English | 10.5 | 10.5 | 11.6 | 11.2 |
| French | 3.3 | 3.7 | 5.7 | 5.1 |

Source: Numeris and CRTC (Canadians 2+)

Over the last five fiscal years, Canadian documentaries have been holding their own in terms of their share of documentary viewership on English-language television in Canada. Canadian documentaries have accounted for approximately half of full-day documentary viewing hours¹⁴, though this percentage has been declining slightly in recent years, down to only 45% in 2020/21. The percentage of these productions which are funded by CMF has also been decreasing, down from 23% in 2016/17 to 17% in 2020/21. Non-CMF-funded projects have remained fairly steady during the same time period.

While the figures are similar regarding viewership of Canadian documentaries during peak periods, the 2020/21 decline is more pronounced, dropping to 39% of overall viewership. As opposed to over full-day viewing, the large drop during peak hours appears to correlate with a decline in non-CMF-funded projects, though the correlation may be incidental.

¹⁴ "Full-day viewing hours" refers to viewing over a 24 hour period, and is used as a metric in contrast with "peak viewing hours", which are 7-11 pm.

Figure 58 - Share of Full-Day Viewing of Documentaries Airing on English-language Television in Canada: 2016/17 to 2020/21

| | CMF-funded documentaries | Other Canadian Documentaries | Total Canadian Documentaries | Foreign Documentaries |
|---------|--------------------------|------------------------------|------------------------------|-----------------------|
| 2016/17 | 23% | 29% | 52% | 48% |
| 2017/18 | 22% | 31% | 53% | 47% |
| 2018/19 | 23% | 31% | 54% | 46% |
| 2019/20 | 19% | 31% | 50% | 50% |
| 2020/21 | 17% | 28% | 45% | 55% |

Source: Numeris and CMF

Figure 59 - Share of Peak Period Viewing of Documentaries Airing on English-language Television in Canada: 2016/17 to 2020/21

| | CMF-funded documentaries | Other Canadian Documentaries | Total Canadian Documentaries | Foreign Documentaries |
|---------|--------------------------|------------------------------|------------------------------|-----------------------|
| 2016/17 | 25% | 27% | 52% | 48% |
| 2017/18 | 21% | 26% | 47% | 53% |
| 2018/19 | 24% | 24% | 48% | 52% |
| 2019/20 | 21% | 25% | 46% | 54% |
| 2020/21 | 20% | 19% | 39% | 61% |

Source: Numeris and CMF



The viewership distribution in the French-language market is notably different from that of the English-language market, when it comes to documentaries airing on television over both the full-day and peak periods. Canadians watching French-language documentaries are far more likely to watch Canadian content, with between a 73%-80% share of French-language documentary viewership in the 2016/17 to 2020/21 period being attributable to Canadian productions.

Interestingly, the majority of Canadian documentaries viewed on French-language television were not funded by the CMF, with CMF-funded documentaries making up approximately one third or less of the total Canadian documentary viewership share. However, it is worth noting that the viewing share of CMF-funded documentaries has been steadily increasing over time (particularly when compared to a decade ago in 2012/13, when CMF-funded projects made up only 9% of documentary viewing, compared to 68% non-CMF-funded projects), suggesting movement towards repairing this disparity.

The distribution of viewership over peak periods was very similar to the full-day period statistics, although CMF-funded documentaries were slightly more represented compared to other Canadian documentaries.



Figure 60 - Share of Full-Day Period Viewing of Documentaries Airing on French-language Television in Canada: 2016/17 to 2020/21

| | CMF-funded documentaries | Other Canadian Documentaries | Total Canadian Documentaries | Foreign Documentaries |
|---------|--------------------------|------------------------------|------------------------------|-----------------------|
| 2016/17 | 20% | 53% | 73% | 27% |
| 2017/18 | 21% | 56% | 77% | 23% |
| 2018/19 | 23% | 55% | 78% | 22% |
| 2019/20 | 26% | 54% | 80% | 20% |
| 2020/21 | 27% | 49% | 76% | 25% |

Source: Numeris and CMF

Figure 61 - Share of Peak Period Viewing of Documentaries Airing on French-language Television in Canada: 2016/17 to 2020/21

| | CMF-funded documentaries | Other Canadian Documentaries | Total Canadian Documentaries | Foreign Documentaries |
|---------|--------------------------|------------------------------|------------------------------|-----------------------|
| 2016/17 | 21% | 53% | 74% | 26% |
| 2017/18 | 24% | 52% | 76% | 24% |
| 2018/19 | 26% | 51% | 77% | 23% |
| 2019/20 | 33% | 48% | 81% | 19% |
| 2020/21 | 30% | 49% | 79% | 21% |

Source: Numeris and CMF

5.2 Theatrical Audiences

Canadian documentaries fared reasonably well at the box office in 2022, in spite of strong competition from films worldwide, particularly from the United States and France. Canadian-made documentaries accounted for four of the top ten documentaries exhibited in Canadian theatres, placing 3rd, 4th, 9th and 10th.

However, only one of those four films was primarily in English (Fire of Love), and that was in combination with French. Two of the other films were just in French, and one was in Mandarin, showing that non-English Canadian documentaries appear to be more successful at the box office than English ones.



Figure 62 - Top 10 Documentaries Exhibited in Canadian Theatres: 2022

| Rank | Title | Country of Origin | Original Language |
|------|--|---|-------------------|
| 1 | Moonage Daydream | Germany-US | English |
| 2 | Hallelujah: Leonard Cohen, a Journey, a Song | US | English |
| 3 | Je vous salue salope: la misogynie au temps du numérique | Canada | French |
| 4 | Fire of Love | Canada | English-French |
| 5 | The Velvet Queen | France | French |
| 6 | The Glance of Music / Ennio | Italy-Belgium-Netherlands-Japan-China-Germany | English-Italian |
| 7 | Jane par Charlotte | France | French |
| 8 | Neil Young: Harvest Time | US | English |
| 9 | Gabor | Canada | French |
| 10 | Eternal Spring | Canada | Mandarin |

Source: MTAC

The success of non-English Canadian documentaries is further highlighted when looking at the top Canadian documentaries exhibited in Canadian theatres in 2022. While half of the top ten documentaries were English, two of those were combined English-French productions, and the three that were exclusively in English were among the bottom four.

This further reinforces that Canadian audiences appear to have greater engagement with non-English documentary productions. This may in part be because those films have a more dedicated built in audience when targeting a linguistic minority community.

Figure 63 - Top 10 Canadian Documentaries Exhibited in Canadian Theatres: 2022

| Rank | Title | Country of Origin | Original Language |
|------|--|-------------------|-------------------|
| 1 | Je vous salue salope: la misogynie au temps du numérique | Canada | French |
| 2 | Fire of Love | Canada | English-French |
| 3 | Gabor | Canada | French |
| 4 | Eternal Spring | Canada | Mandarin |
| 5 | L'ordre secret | Canada | French |
| 6 | Last of the Right Whales | Canada | English-French |
| 7 | Revival69: The Concert that Rocked the World | Canada | English |
| 8 | Humus | Canada | French |
| 9 | The Long Rider | Canada | English |
| 10 | Flight of the Butterflies | Canada | English |

Source: MTAC

Canada was less well represented among the top ten documentaries shown in Canadian theatres in 2021 than in 2022, with only three productions. The documentary box office that year was far more dominated by American productions,

with two independent US documentaries and two co-productions. Once again, the Canadian documentaries were all either in French or both French and English, reflecting more robust audiences for French-language Canadian productions.

Figure 64 - Top 10 Documentaries Exhibited in Canadian Theatres: 2021

| Rank | Title | Country of Origin | Original Language |
|------|--|-------------------|------------------------------|
| 1 | Roadrunner: A Film About Anthony Bourdain | US | English |
| 2 | La parfaite victime | Canada | French |
| 3 | Big Giant Wave | Canada | English-French |
| 4 | Summer of Soul (...Or, When the Revolution Could Not Be Televised) | US | English |
| 5 | The Rescue | UK-US | English |
| 6 | The Truffle Hunters | Italy, Greece-US | Italian |
| 7 | The Hidden Life of the Trees | Germany | German-Korean-English-Polish |
| 8 | Hold-Up : retour sur un chaos | France | French |
| 9 | Blackpink: The Movie | South Korea | Korean |
| 10 | Les fils | Canada | French |

Source: MTAC

French-language productions dominated the top Canadian documentaries in Canadian theatres even more in 2021 than in 2022. Four of the top five productions were French-only, and one was in both English and French. Of the top ten films, only two were only in English.

Figure 65 - Top 10 Canadian Documentaries Exhibited in Canadian Theatres: 2021

| Rank | Title | Country of Origin | Original Language |
|------|--|-------------------|-------------------|
| 1 | La parfaite victime | Canada | French |
| 2 | Big Giant Wave | Canada | English-French |
| 3 | Les fils | Canada | French |
| 4 | Le dernier Nataq | Canada | French |
| 5 | Prière pour une mitaine perdue | Canada | French |
| 6 | Florian's Knights | Canada | English |
| 7 | Kimmapiiyipitssini: The Meaning of Empathy | Canada | English |
| 8 | Ainsi soient-elles | Canada | French |
| 9 | Seuls | Canada | French-English |
| 10 | L'histoire interdite | Canada | French-English |

Source: MTAC

5.3 Summary Findings

Viewership of Canadian documentaries spiked during COVID-19 lockdowns, both within Canada and internationally, with viewers becoming more interested in true crime content, productions that were escapist in nature, and projects engaging with social issues.

Both English-language and French-language Canadian documentary television productions reached peak average weekly viewing hours in 2020, but declines in 2021 were minimal, suggesting that this trend will continue. Approximately half of English-language television documentary viewing hours are attributable to Canadian documentaries (as opposed to foreign documentaries), though this percentage is in slight

decline, particularly during peak period viewing hours. In contrast, the French-language television documentary market is much more heavily dominated by Canadian productions, with over three quarters of viewing time, and no noticeable downwards trend.

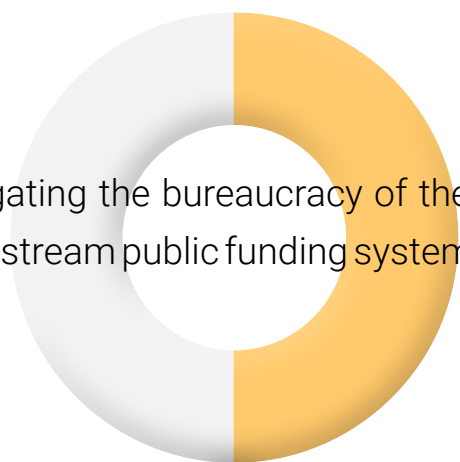
Canadian documentaries fared well at the Canadian box office in 2022, despite strong international competition. Canadian French-language documentaries or multilingual documentaries were noticeably more successful than English-only documentaries. 2022 was also a more successful year than 2021, hopefully indicating an upward trend.



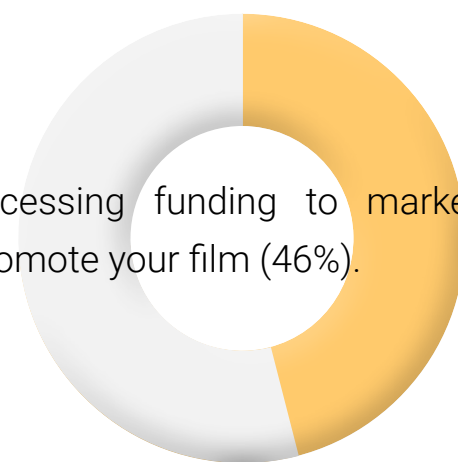
6. Making Documentaries in Canada – Key Trends, Challenges, and Opportunities

This section provides a summary of key findings from the survey and stakeholder interviews. Documentary creators continue to experience a range of challenges in the industry. Challenges experienced most often (based on survey results) are:

- navigating the bureaucracy of the current mainstream public funding systems (50%);



- accessing funding to market and promote your film (46%).



- accessing funding to make films (e.g., availability/lack of seed funding, overall public investment/support from government to documentary sector, access to/eligibility for grants, etc.) (74%);



The survey also revealed various strategies that documentary creators are using to overcome these challenges (outlined in Figure 67).

Figure 66 - In a typical non-COVID year, what would you identify as the top 3 barriers/challenges you experience as a documentary creator? n=142

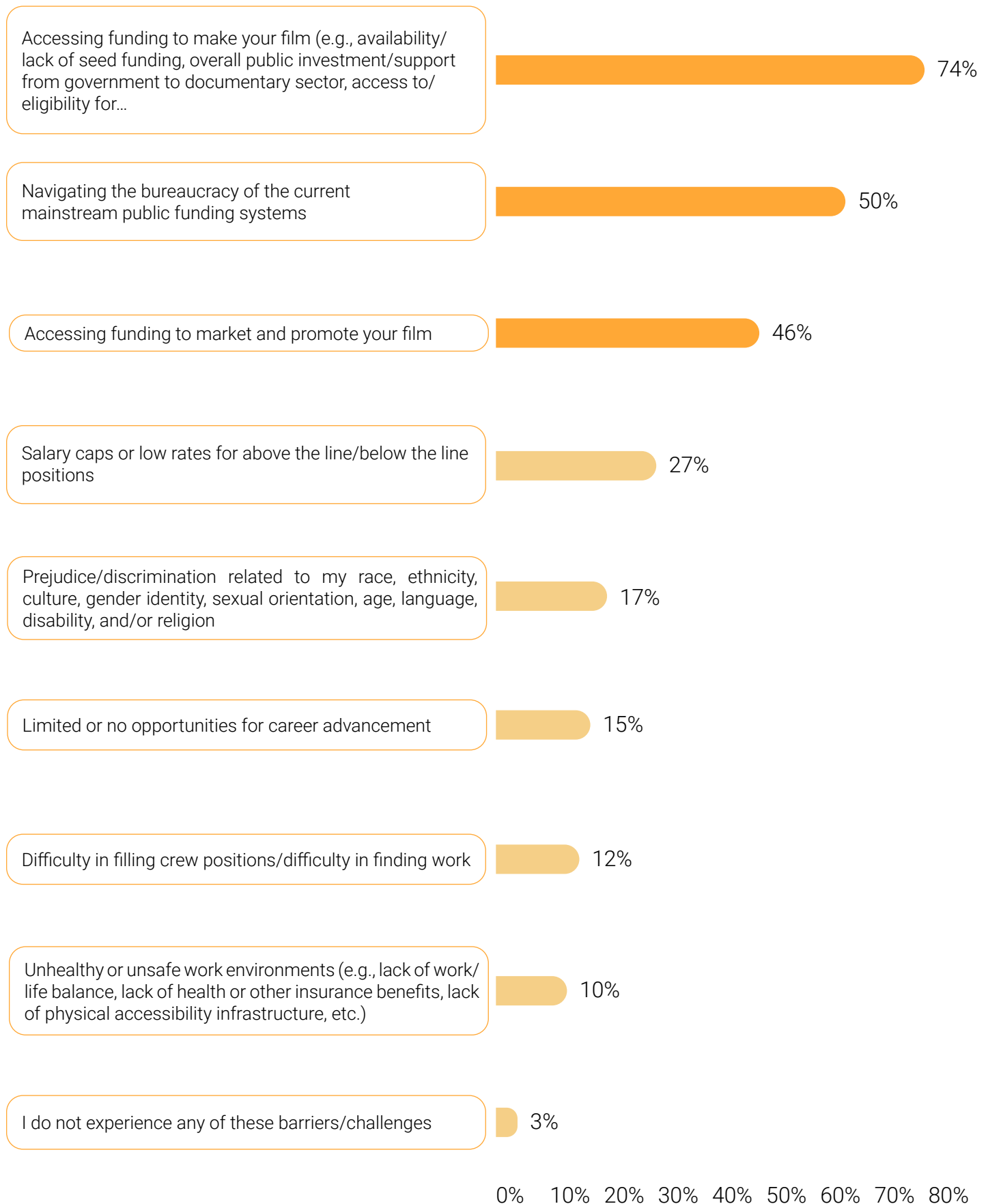


Figure 67 - Please describe some of the strategies you have used to help overcome these barriers/challenges? n=109

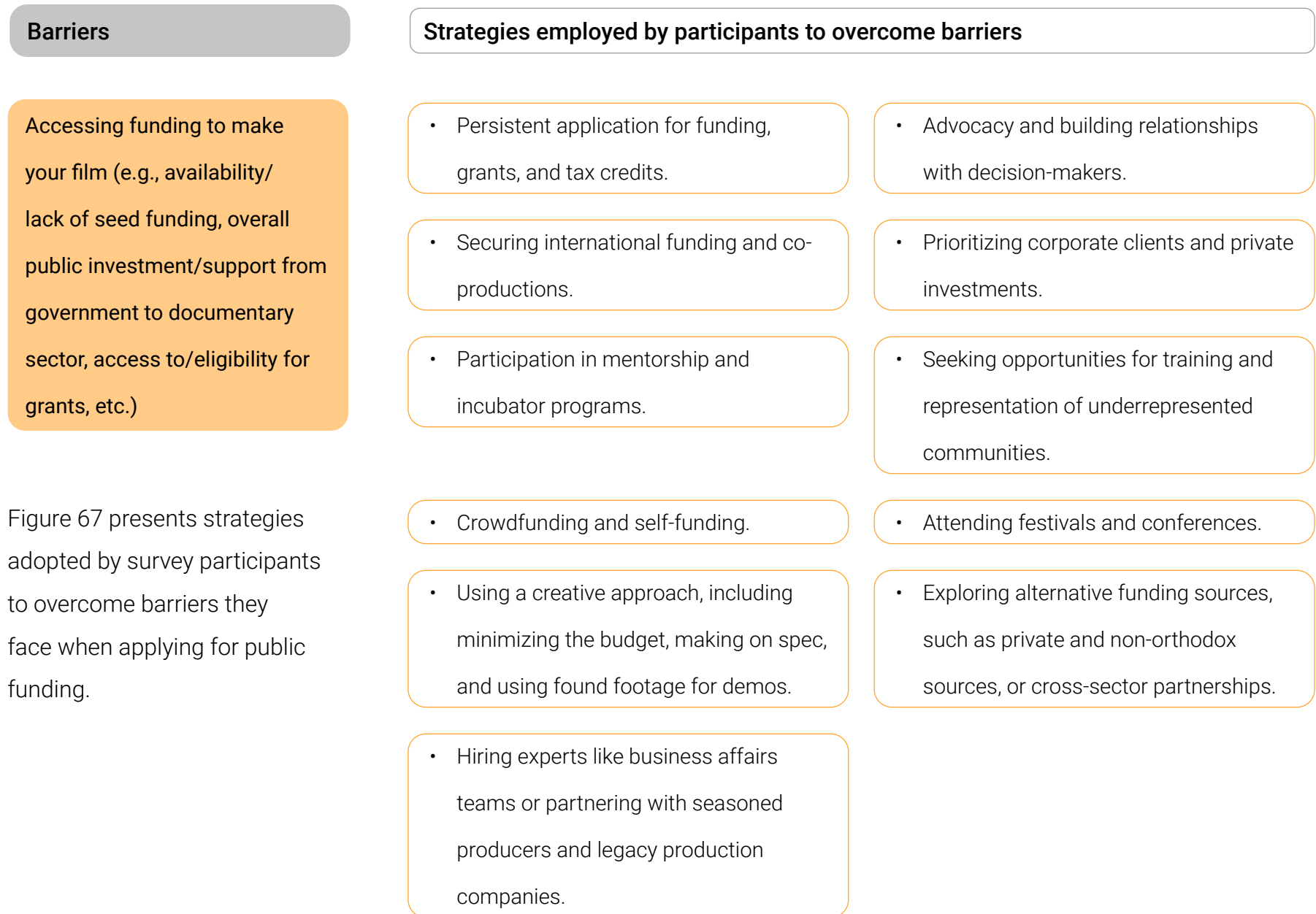


Figure 67 - Please describe some of the strategies you have used to help overcome these barriers/challenges? n=109



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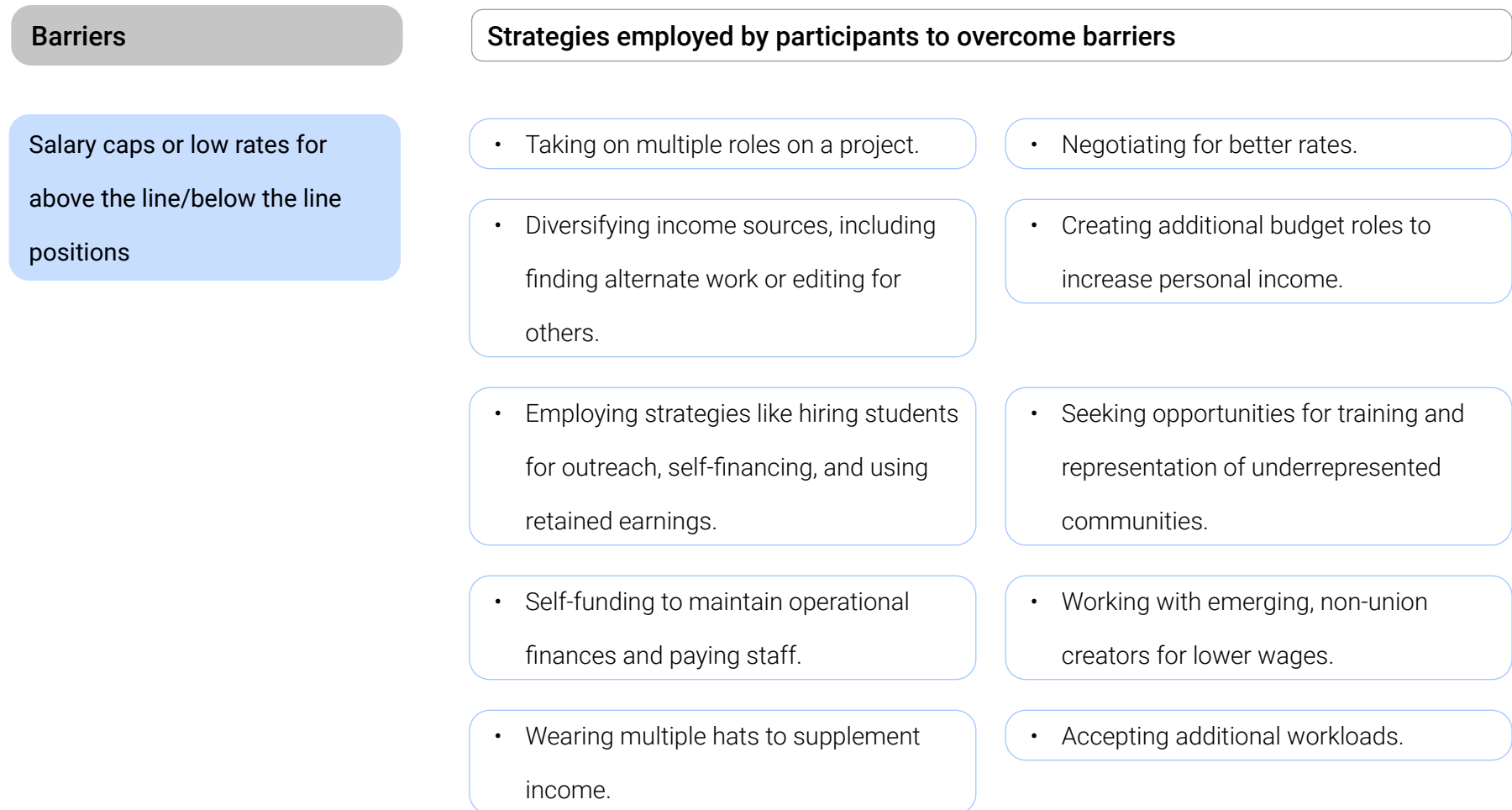


Figure 67 - Please describe some of the strategies you have used to help overcome these barriers/challenges? n=109

| Barriers | Strategies employed by participants to overcome barriers | |
|--|--|--|
| Prejudice/discrimination related to my race, ethnicity, culture, gender identity, sexual orientation, age, language, disability, and/or religion | <ul style="list-style-type: none">• Advocating and standing up for personal rights. | <ul style="list-style-type: none">• Establishing own production company that emphasizes inclusivity, diversity, and safety. |
| | <ul style="list-style-type: none">• Building alliances with companies and individuals facing similar barriers and working with other marginalized filmmakers. | <ul style="list-style-type: none">• Creating niche communities and content; resisting pressure to conform to harmful industry standards (like glorifying burnout). |
| | <ul style="list-style-type: none">• Avoiding mention of personal characteristics that could incite discrimination (like age). | <ul style="list-style-type: none">• Persistence and seeking opportunities outside of local environments. |
| | <ul style="list-style-type: none">• Responding to opportunities involving underrepresented groups (such as specifically for Black, Indigenous or other racialized creators). | <ul style="list-style-type: none">• Engaging legal assistance to negotiate contracts in the presence of prejudice, and walking away from projects where unfair behaviour is evident. |
| | <ul style="list-style-type: none">• Advocacy for support for persons with disabilities and respect for experience and merit in the industry. | <ul style="list-style-type: none">• Continuing to fight against institutional and societal prejudices by forming alliances and showing up. |
| | <ul style="list-style-type: none">• Emphasizing mental health awareness, and advocating for realistic views and treatment within the industry. | <ul style="list-style-type: none">• Working independently on lower-budget films to avoid indignities from larger broadcasting companies. |

Figure 67 - Please describe some of the strategies you have used to help overcome these barriers/challenges? n=109

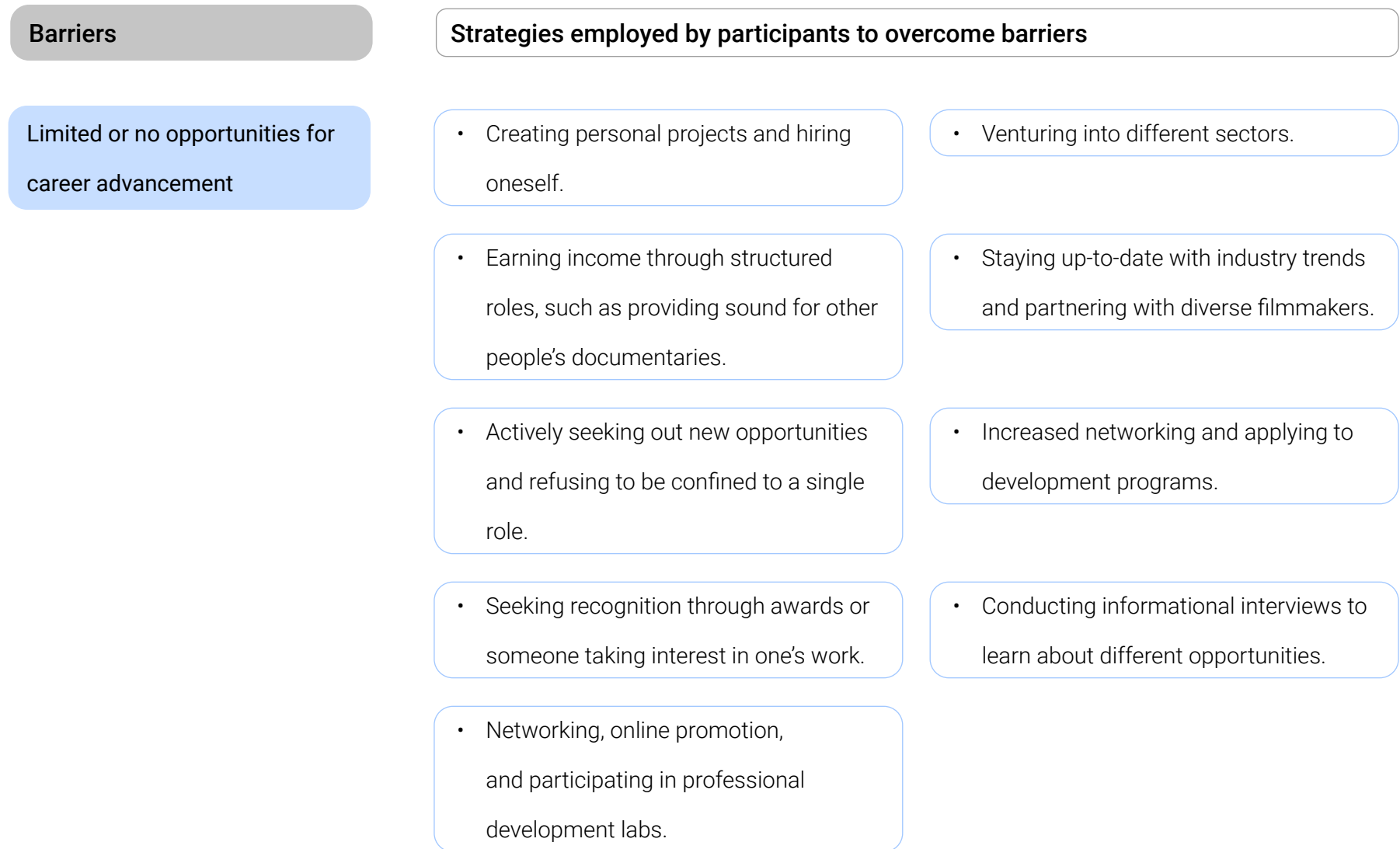


Figure 67 - Please describe some of the strategies you have used to help overcome these barriers/challenges? n=109

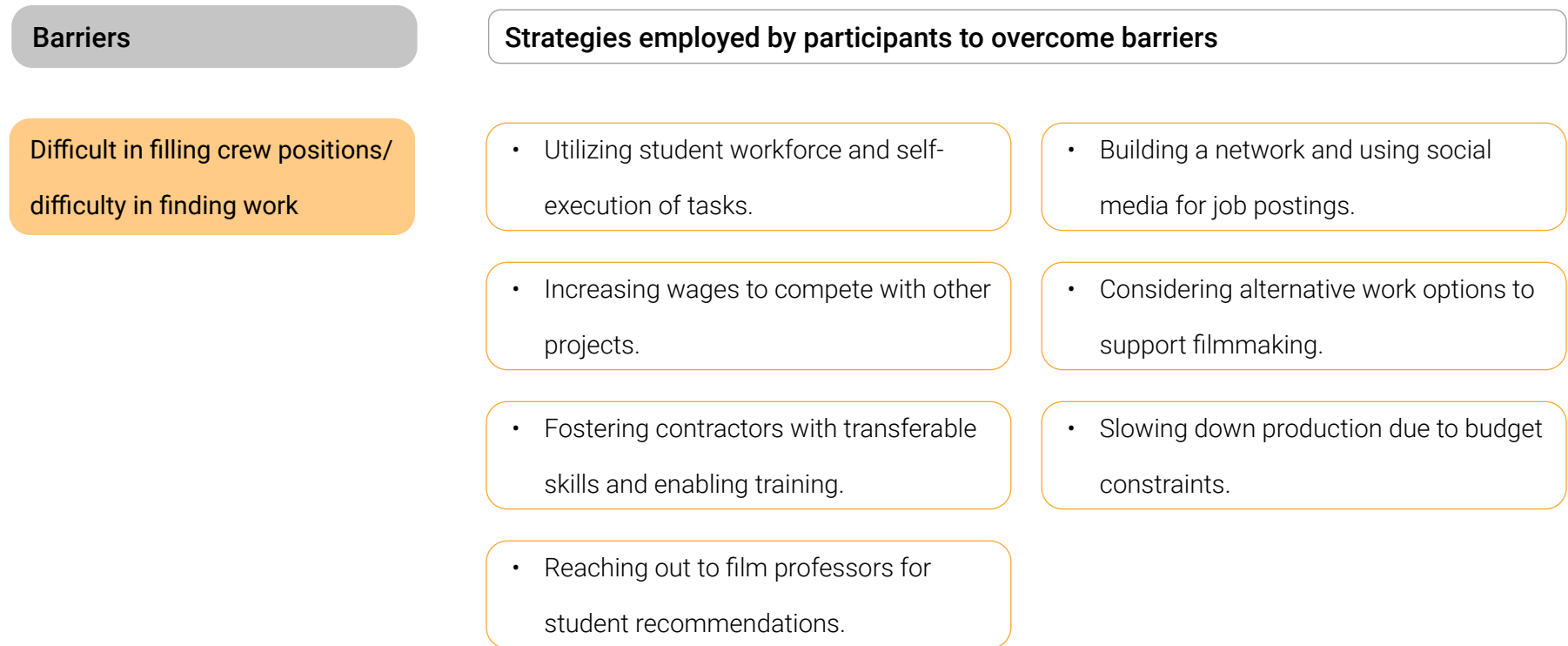


Figure 67 - Please describe some of the strategies you have used to help overcome these barriers/challenges? n=109

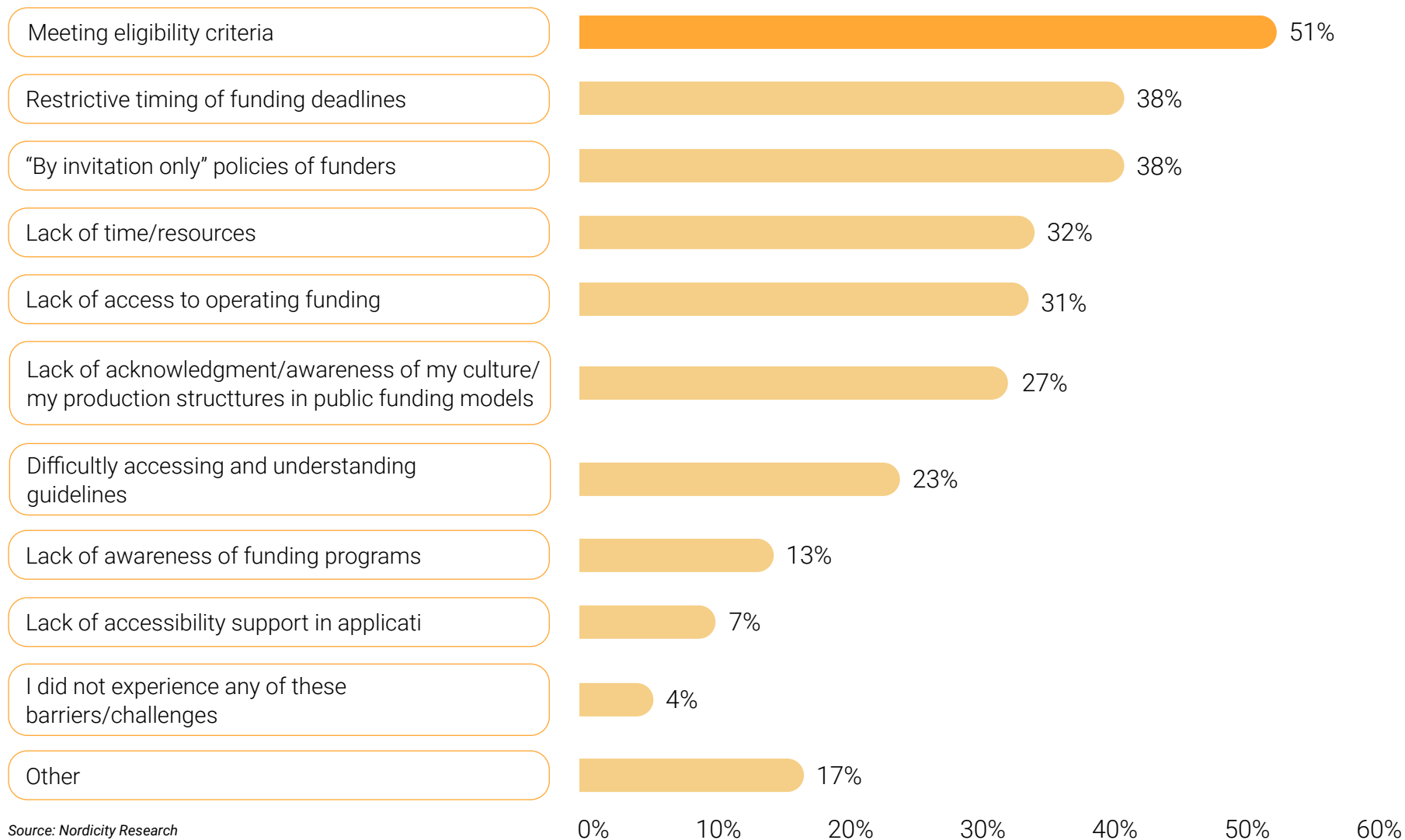


Through the survey and interviews, documentary creators had the opportunity to expand on their experiences in the industry. A summary of key findings is included below.

Accessing Funding

When asked about specific challenges related to public funding, 51% of survey respondents selected meeting eligibility criteria (51%) when applying for public funding. Also, over a third confront barriers of restrictive timing of funding deadlines (38%) and “By invitation only” policies of funders (38%).

Figure 68 - Which (if any) of the following would you say are barriers you face when applying for public funding? n=104



Survey participants also noted other challenges faced when applying for public funds as follows:

Support and Access to Funding:

The perception amongst documentary creators is that there is insufficient funding across the board. In particular, stakeholders noted that there is inadequate support for development for established filmmakers, as well as for marketing and impact producing. In addition, accessing funding is seen as a significant challenge, especially due to the requirement of having a signed-on broadcaster early in the process. Unfortunately, in cases where participants sought interim financing for their projects, most were unable to access the loans they require for their projects (52%) as well.

Career Impact:

Changes in funding priorities and practices have led to career difficulties for some filmmakers. The inability to secure funding for projects has resulted in financial hardship and career uncertainty, leading to considerations of leaving the industry.

Regional Disparity and Language Representation:

There is a perceived regional bias in funding allocations, with a concentration of partnerships in Toronto and Montreal. There's also a noted lack of opportunities for French-language documentaries in Canada. For example, participants noted a lack of slots among broadcasters for French-language documentaries. Participants, however, noted growing recognition of the North, and interest in regional representation.

Timing and Awareness of Funding Opportunities:

The timing of grants and poor identification of deadlines contribute to challenges in accessing funding. It's highlighted that funding cycles often do not align with project timelines, causing complications in the production process.

Regional Disparity and Language Representation:

There is a perceived regional bias in funding allocations, with a concentration of partnerships in Toronto and Montreal. There's also a noted lack of opportunities for French-language documentaries in Canada. For example, participants noted a lack of slots among broadcasters for French-language documentaries. Participants, however, noted growing recognition of the North, and interest in regional representation.

Influence of Cultural Bias and Ageism:

There's a perceived lack of diversity among those who greenlight productions, causing potential cultural biases. Ageism is also seen as a barrier in the industry.

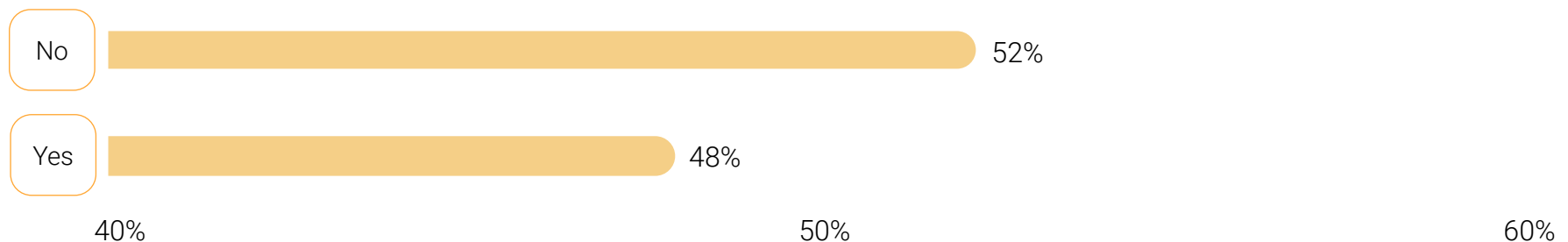
Financial Risk and Knowledge Gap:

Personal financial risk is a significant concern. The ability to finance projects during development or interim periods poses a significant challenge. There's also a perceived lack of training for creators in business affairs, and navigating tax credits and financing within the public system.

Role of Broadcasters:

Public broadcasters are seen as gatekeepers, controlling access to the majority of funding and influencing the nature of projects that are greenlit. They are considered overly conservative in their choices, leading to a perceived lack of ambition, vision, and diversity in Canadian TV.

Figure 69 - If you seek interim financing, are you able to access the loans you require to finance your projects? n=108

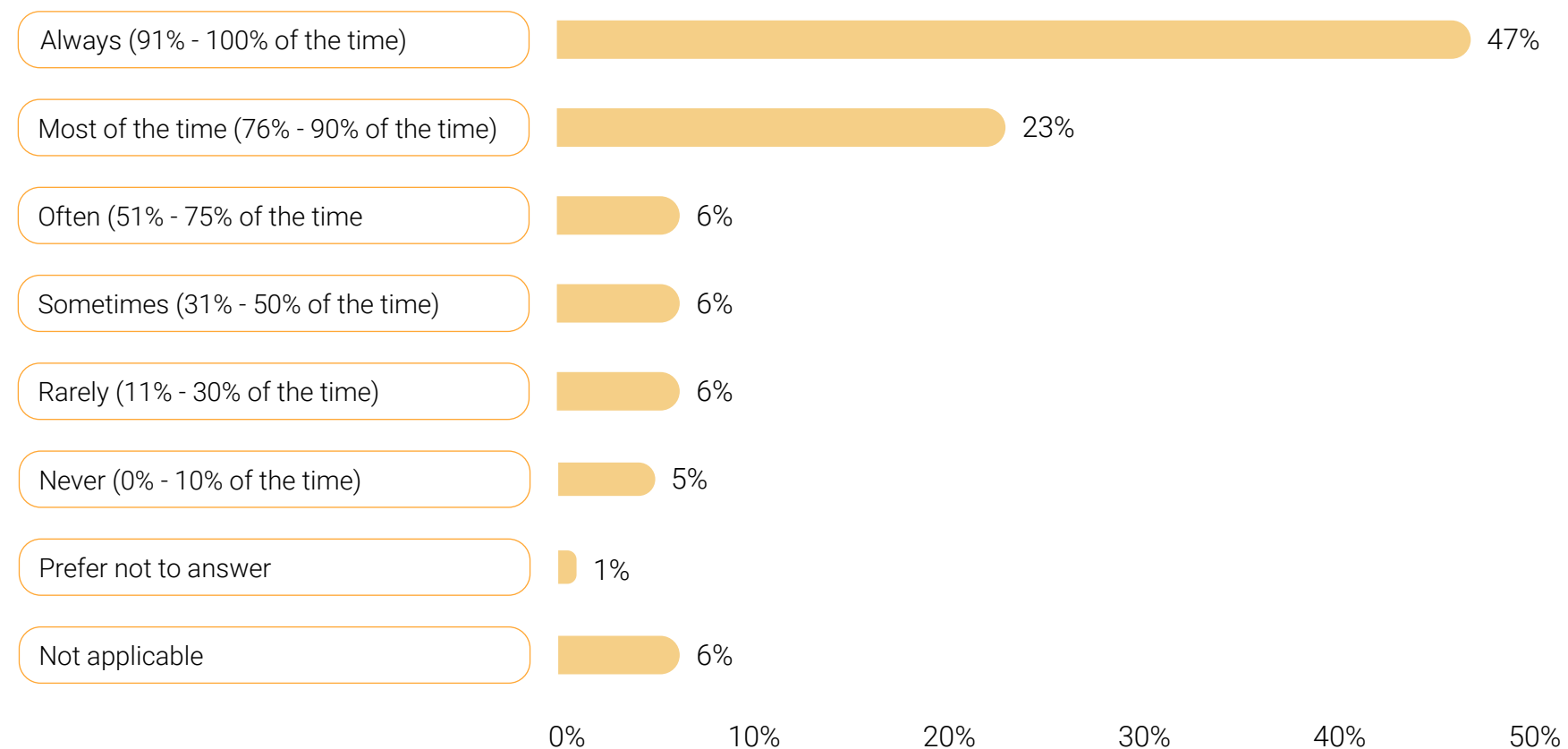


Source: DOC Getting Real 7 Survey

Retaining Ownership of Intellectual Property (IP)

Most of the survey respondents retain the Intellectual Property (IP) rights to their projects most or all the time (76% -100% of the time) (70%).

Figure 70 - How often do you typically retain the rights to your Intellectual Property (IP) for projects you initiate? n=143



Source: DOC Getting Real 7 Survey

For participants who rarely or never retain their IP rights (11%), the following barriers were noted:

Inadequate Compensation vs. IP Ownership:

The notion of intellectual property (IP) ownership is considered a luxury by some filmmakers, particularly those who struggle with being adequately compensated for their time and effort. The focus tends to lean towards ensuring fair pay for their work rather than negotiating for IP rights.

Limited Trust and Partnership:

A strong and trusting partnership with the producer can influence the willingness of the director to hand over IP rights. Directors who trust their producers are more likely to cede their IP rights and focus on the creative aspects of the project.

Compulsory IP Transfer for Funding:

Some respondents noted that a condition for receiving funding often involved ceding IP rights to the funding organization, or to share IP with another production company.

Racial Inequity:

One respondent highlighted racial inequity in the documentary sector, citing the need to transfer IP to a white company to access funding. They expressed uncertainty about financing future projects without partnering with white organizations. Interviews revealed that this challenge persists even for documentaries that seek to showcase diverse stories.

Limited Knowledge about IP:

Limited knowledge about intellectual property laws and regulations may prevent creators from negotiating and retaining their IP rights.

For participants who rarely or never retain their IP rights (11%), the following barriers were noted: - cont.

Work-for-hire Arrangements and Lack of Credit:

Some filmmakers have worked on a “work-for-hire” basis where they do not retain any IP rights or receive any credit for their creative work.

Ownership and Role Clarification:

The ownership of the project is seen as important and often rests with the main creator. There are cases where directors are the original creators, and the producers are brought on board later, further complicating IP negotiations.

Company Policies: Company Policies:

For some, the company’s policy or the production agreement mandates that the producer or production company retain the IP rights. This implies a structural challenge, where the policies of larger production entities or companies inherently prevent individual creators from retaining some of their IP rights.

Commissioned Projects:

Because of CRA rules, documentary projects commissioned by nonprofits who provide funding often retain the rights of the projects, presenting another scenario where creators may not hold IP rights.

Discoverability and Distribution of Documentaries

One reoccurring theme of the stakeholder interviews and survey was the way that changes in distribution (particularly the rise of streaming platforms) has impacted how and how easily productions can reach their target audiences. One participant identified that streaming and digital-first documentaries have opened up opportunities for documentary creators to connect with larger, and more targeted audiences.

However, breaking through all the competition was repeatedly identified as a challenge, and many interviewees felt that the distribution system in Canada was lacking. From one participant's perspective, it is almost impossible to get a project seen by a broader audience without a significant time and financial investment on the part of the documentary creators.

Even with that investment, documentaries rarely find wide audiences unless a particular demographic really falls in love with the concept (which is more common for productions by and about marginalized groups or social/environment justice issues, but is still comparatively rare).

Several participants felt that being well-received at a festival was one of the only reliable ways for their work to reach a wider audience, particularly if festival success leads to a theatrical release. That success also increases the likelihood of a production being picked up by streaming platforms or conventional television, if it isn't already affiliated with a broadcaster.

Discoverability and Distribution of Documentaries

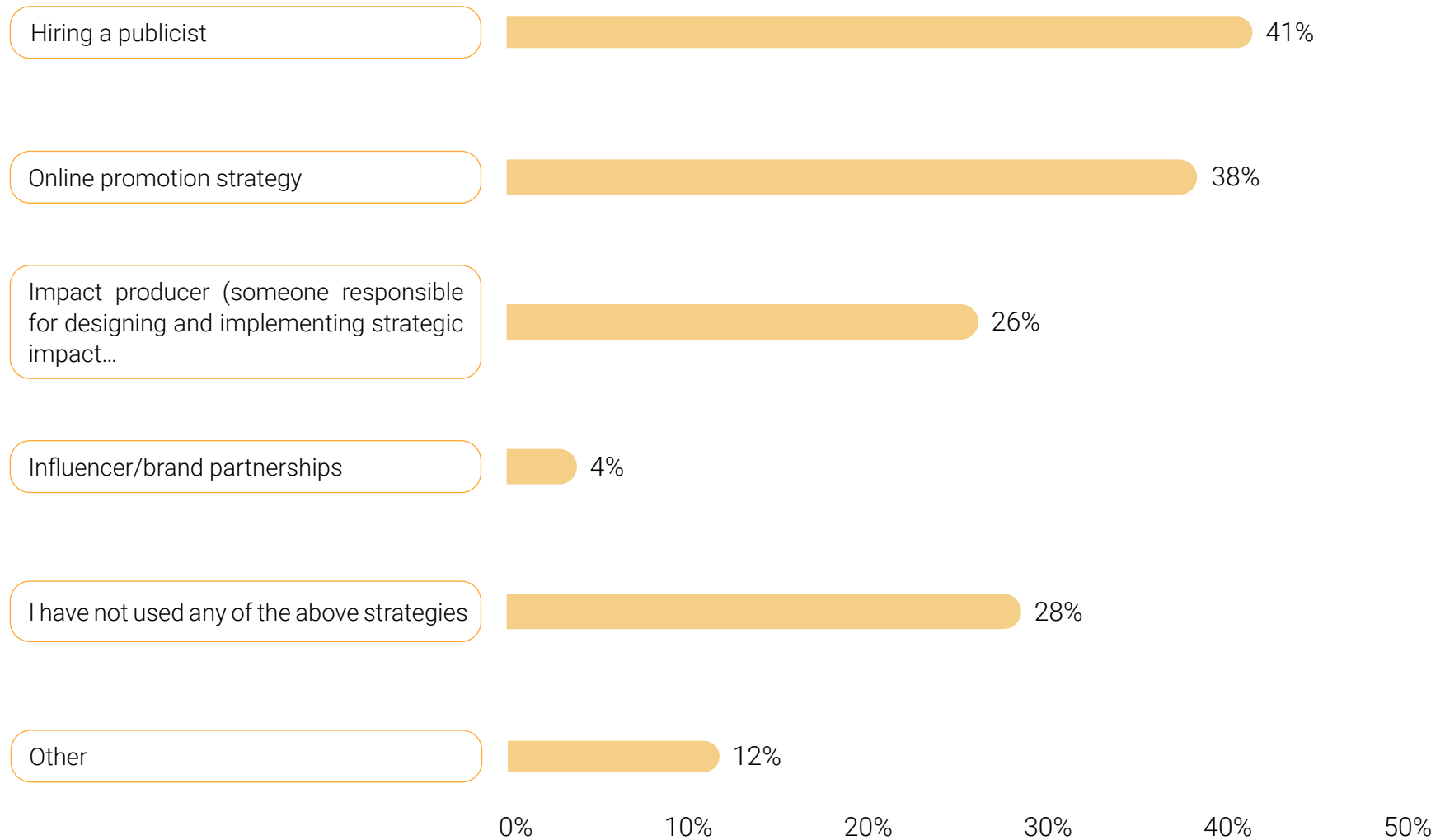
An additional challenge related to distribution and discovery was the way funders do or don't allow for funding to be applied to promoting a production. While some funds require consideration of discoverability in proposals or applications, others don't allow promotion to be included in a budget for allocation of that body's funds. This is exacerbated by the fact that, in the opinion of multiple interviewees, broadcasters are not committing sufficient time and resources to the promotion of Canadian productions. Additionally, in the case of funding streams that allow (or even require) a consideration of discoverability, that aspect of an application requires significant time, energy and knowledge input that some independent filmmakers or small companies might not be able to access.

More than a third of survey respondents reported hiring a publicist (41%) and adopting an online promotion strategy (38%) as two approaches that worked best in reaching audiences for their documentary film. An additional quarter (26%) of respondents found hiring an impact producer an effective tool.

Other definitions noted by participants included:

- Global distribution of documentary
- Partnership with groups who are invested in the issues covered in the documentary
- Hiring a content specialist and/or a community specialist who understands the issues and can screen at various communities
- Self-distribution as an effective approach
- Using a distributor who has resources and relationships with exhibitors and other outlets
- Making content for broadcasters or organizations with built-in distribution capacity
- Festival recognitions
- Website promotion

Figure 71 - Which of the following strategies have worked best in helping you reach audiences? n=139



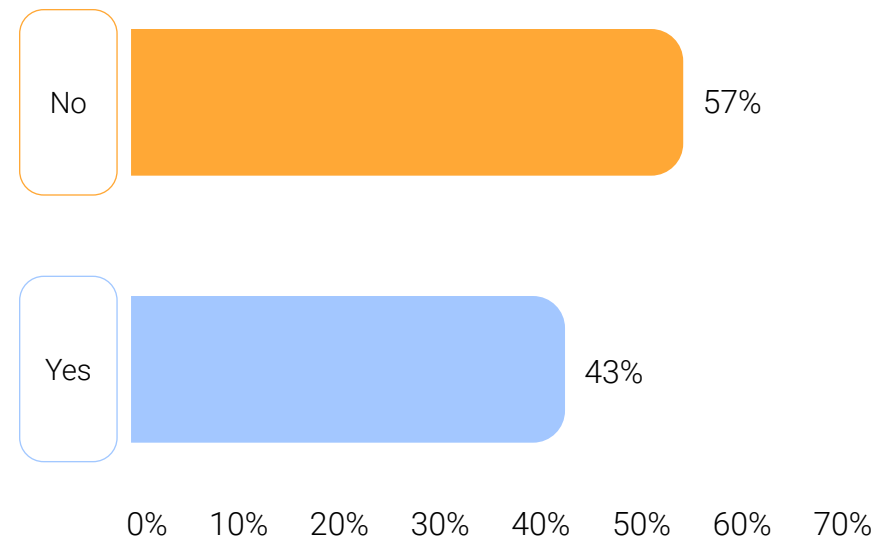
Source: DOC Getting Real 7 Survey

Community Building and Storytelling

Documentaries continue to play a strong role in community building and storytelling. Interviewees felt that sharing the stories of specific communities (and particularly those communities who have historically been ignored or marginalized by mainstream media) was valuable and important for both emotional reasons and logistical ones. Some producers found that strong community support helped raise awareness about productions, increased audience engagement, or even helped close funding gaps. When members of communities are excited about their stories being shared with the world, they are far more invested in the success of a documentary film. Businesses and organizations that serve those communities are also more inclined to show support, either financially or in other ways.

More than a third (43%) of survey participants made documentaries about themselves, family and community. Even interviewees who didn't want to tell stories from their own lives or communities emphasized a desire to tell the personal or community stories of others and felt that documentary is a particularly good tool for that kind of narrative.

Figure 72 - Have you made a documentary about yourself, your family, or your community? n=216



Source: DOC Getting Real 7 Survey

Equity-deserving Communities¹⁶

Despite a growing emphasis on diversity and equity, and numerous initiatives designed to support diverse creators in the industry, members of equity-deserving groups continue to experience major obstacles because of their identities.

Many survey participants in the research pointed to a disconnect between the promotion of Black, Indigenous, and other racialized stories and policies and the actual support given to diverse filmmakers. They cited institutional bias, such as racial and gender bias, as a significant challenge, and felt

that their projects were often overlooked due to their identities. Furthermore, several individuals from Black, Indigenous and other racialized communities feel their unique identities and experiences are oversimplified or misunderstood by decision-makers.

Looking at the international documentary community more broadly, multiple individuals felt that other jurisdictions have progressed further than Canada in terms of diversity. They noted more diversity on decision-making tables and

¹⁶ In this report, the terms “marginalized” and “equity-deserving” are used to refer to groups that have historically been underrepresented in the Canadian screen industries.

This terminology aligns with best practices at the time of writing this report, however, language is constantly evolving and may need to be updated for future iterations of the report.

Equity-deserving Communities

committees, and more studios that are fully owned or staffed by members of equity-deserving groups. That said, it was acknowledged that these advances don't necessarily mean that projects get picked up more frequently or have more visibility, because there's more competition in that jurisdiction.

However, interviewees did also feel that the documentary community in Canada is more advanced on issues of inclusion than the rest of the Canadian film community, both on the part of creators and on the part of those distributing funding.

In particular, it was highlighted that there have been good faith efforts to fund and promote Indigenous projects, in alignment with broader narratives around reconciliation and the lasting impacts of colonialism. However, it was noted that documentaries sometimes remove ethnographic or historical context that's considered common knowledge to lighten the overall project. While that context may be broadly known within Canada, this creates a challenge in marketing those documentaries in foreign markets.

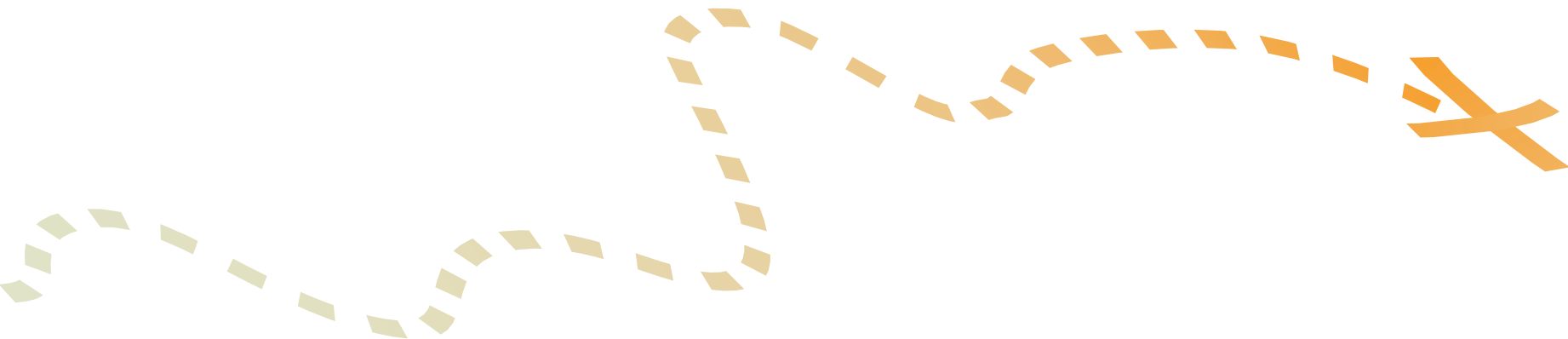
Defining Canadian Content

One of the primary goals of the Online Streaming Act was to require streaming services to contribute to the creation, production, distribution, and discoverability of Canadian content. One of the most important sets of regulations will be those that define Canadian content.

The research gathered insight into what documentary creators considered “Canadian content” through the survey and stakeholder interviews.

The majority of survey respondents and interviewees define “Canadian content” as content where the IP is owned by Canadians (79%) and content where Canadians occupy most key creative roles (76%).

While opinions varied on how much of the crew or staff on a production needed to be Canadian, many interviewees felt that there were certain perspectives and styles of documentaries that are distinct in this country, such as the ability to tell our own stories with the complexity of intersecting communities/identities, or approaching narratives with a unique kind of empathy. Interviewees felt that the presence of these experiences and perspectives was far more important than having a production that was set or shot in Canada. Some creators explicitly stated that the work didn’t need to be geographically centered within our borders to be considered Canadian content, and others didn’t even consider it as a factor in their definition.



Defining Canadian Content

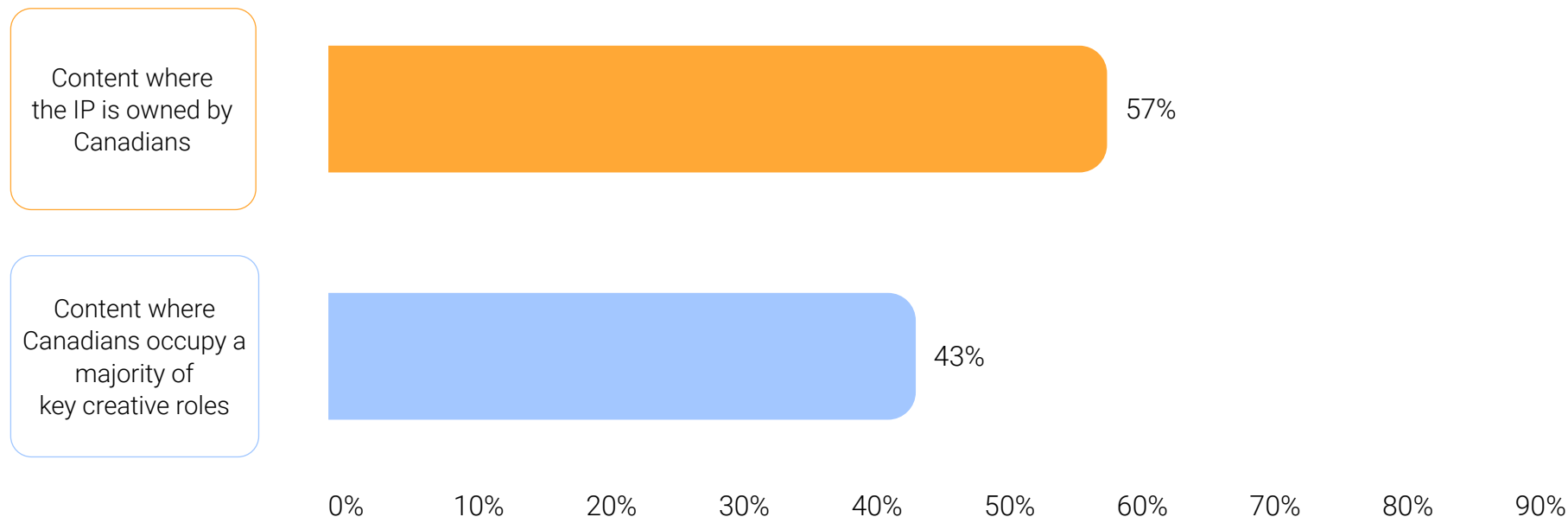
Other definitions noted by participants included:

- The definition of Canadian Audio-Visual Certification Office (CAVCO) - *i.e., content produced by a production company owned and controlled by Canadians that achieves a minimum 6/10 on the CAVCO point scale.*¹⁷

- Stories set in “Canada”, about the people or places within the country, or about issues and values related to this place or people.

- Content funded by Canadian grants.

Figure 73 - How would you define “Canadian content”? n=145



Source: DOC Getting Real 7 Survey

¹⁷ For more on CAVCO requirements see: [Application guidelines - Canadian Film or Video Production Tax Credit \(CPTC\) - Canada.ca](#)

6.1 Summary Findings

The survey and stakeholder interviews provided further context for the data gathered above. The qualitative analysis revealed that documentary filmmakers continue to face many challenges, with the most critical challenges relating to funding. Specifically, survey participants selected accessing funding to create their films, navigating the bureaucracy of mainstream public funding systems, and accessing funding in marketing and promoting their films as the top 3 barriers they face as documentary creators.

Filmmakers and stakeholders also noted that the rise of streaming platforms has caused changes to distribution

and how they reach their audiences. Although streaming has allowed creators to connect with larger and targeted audiences, it has also created a very competitive and crowded environment. Filmmakers employ a host of methods in finding audiences for their films, including hiring a publicist, adopting an online promotion strategy, and hiring an impact producer.

Despite the growing emphasis on diversity and equity across the industry, filmmakers who identify as being part of equity-deserving groups face additional barriers as a result of their identities. Participants cited institutional bias, such as racial and gender bias, as a significant challenge, and felt that

6.1 Summary Findings

their projects were often overlooked due to their identities. Furthermore, several individuals from Black, Indigenous and other racialized communities feel their unique identities and experiences are oversimplified or misunderstood by decision-makers. However, filmmakers did note that the documentary community is more advanced on issues of inclusion compared to the broader film community in Canada and acknowledged good faith efforts to fund and promote more diverse stories in the country.

Other observed trends in the industry include a tendency for documentary filmmakers to retain their IP ownership in Canada, with 70% of survey participants retaining their rights 76%-100% of the time. The value of documentaries in community building and storytelling was also stressed,

with 43% of survey respondents indicating that they had made documentaries about themselves, their families and communities.

Finally, when asked to define “Canadian content”, within the context of upcoming changes resulting from the Online Streaming Act, most filmmakers defined it as content where IP is owned by Canadians and where Canadians occupy most key creative roles. Respondents also emphasized that because of the unique styles and perspectives of Canadian documentary filmmakers, content did not need to be set within Canadian borders to be considered Canadian. §