



**REPORT**

**A Review of the Canada Media Fund's Aboriginal Program: Key Trends, Stakeholder Perspectives and Future Directions**

**PREPARED FOR**

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## Introduction

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### *1. Preamble*

The Indigenous Screen Office (ISO) mandated Communications MDR to review the Canada Media Fund's (CMF) Aboriginal Program (Program), which supports Indigenous-language television productions, with the goal of ensuring that the Program meets the needs of the Indigenous audio-visual production industry. The findings of this study will support strategies for iterations of the Program guidelines as well as the longer-term direction of the Program.

### *2. Approach and Methodology*

The review of the Aboriginal Program employed two lines of enquiry: 1) a statistical analysis of program data covering the years 2014-2015 to 2018-2019, inclusively, and 2) key informant interviews.

The statistical analysis allowed the consultants to develop a profile of the Program and identify trends with respect to financing for development and production as well as the characteristics of the projects supported in terms of language, genre, and financial structure.

The statistical analysis of the Program was complemented by 25 key informant interviews conducted with Indigenous producers and other stakeholders. The goal of the interviews was to gather perspectives on the design of the Program with respect to the following queries: the barriers to entry into the Program, the extent to which the language requirements of the Program are addressing the needs of the Indigenous production industry, key challenges and opportunities facing this sector, and proposed short-term and long-term changes. Annex 1 contains a list of interviews conducted and provides the interview guide.

### *3. Structure of this Report*

This report is divided into the following three sections:

- Section 1 provides a statistical profile of the Program covering the years 2014-2015 to 2018-2019, inclusively;
- Section II presents the findings of our interviews; and
- Section III concludes with recommendations for consideration by the ISO and the CMF.

## I. A Statistical Profile of the Aboriginal Program: 2014-2015 to 2018-2019

### 1. Key Trends in Funding Between 2014-2015 to 2018-2019

#### 1.1 Total Financing by the Canada Media Fund

In the years from 2014-2015 to 2018-2019, the CMF provided a total of \$40.1 M in production and development financing of Indigenous television and convergent digital media. Financing ranged from a low of \$7 M in 2014-2015 and 2015-2016 to a high of \$9.7 M in 2017-2018.

Figure 1: Total Financing Provided by the Aboriginal Program, by Year, 2014-2015 to 2018-2019

|              | Total Financing     |
|--------------|---------------------|
| 2014-2015    | \$6,936,444         |
| 2015-2016    | \$6,999,721         |
| 2016-2017    | \$7,994,887         |
| 2017-2018    | \$9,700,000         |
| 2018-2019    | \$8,500,000         |
| <b>Total</b> | <b>\$40,131,052</b> |

#### 1.2 Production Financing

The vast majority of financing was provided for television production, ranging from \$5.4 M in 2014-2015, to a high of \$7.9 M in 2017-2018. Production financing for convergent digital media amounted to \$3.9 M over the five years.

Figure 2: Total Production Financing Provided by the Aboriginal Program, by Type of Production and by Year, 2014-2015 to 2018-2019

|              | Television Production |                     | Digital Media Production |                    | All Production             |
|--------------|-----------------------|---------------------|--------------------------|--------------------|----------------------------|
|              | Number of Productions | Total Financing     | Number of Productions    | Total Financing    | Total Production Financing |
| 2014-2015    | 15                    | \$5,422,340         | 13                       | \$824,246          | \$6,246,586                |
| 2015-2016    | 12                    | \$5,524,837         | 12                       | \$594,718          | \$6,119,555                |
| 2016-2017    | 15                    | \$6,421,407         | 8                        | \$760,515          | \$7,181,922                |
| 2017-2018    | 17                    | \$7,901,250         | 12                       | \$998,750          | \$8,800,000                |
| 2018-2019    | 14                    | \$6,977,981         | 10                       | \$672,019          | \$7,650,000                |
| <b>Total</b> | <b>73</b>             | <b>\$32,247,815</b> | <b>55</b>                | <b>\$3,850,248</b> | <b>\$36,098,063</b>        |

The Aboriginal Program funded 70% of the total value of production budgets submitted for funding in the five years examined. The total proportion of production budgets funded ranged from a low of 56% of amounts requested in 2017-2018 to a high of 86% financed in 2018-2019.

Figure 3: Total Budgets of Production Applications and of Funded Productions, Aboriginal Program, by Year, 2014-2015 to 2018-2019

| <b>Television Production Proportion of Total Budgets That Were Supported</b> |   |                   |   |                          |                                  |                          |
|--|---|-------------------|---|--------------------------|----------------------------------|--------------------------|
|  | <i>Amount Total Budgets of Applications</i> | <i># Projects</i> | <i>Total Budgets of Funded Projects</i> | <i># Projects Funded</i> | <i>% of Total Budgets Funded</i> | <i>% Projects Funded</i> |
| 2014-15  | \$15,036,476                                | 20                | \$12,774,178                            | 15                       | 85%                              | 75%                      |
| 2015-16  | \$16,737,041                                | 18                | \$11,871,943                            | 12                       | 71%                              | 67%                      |
| 2016-17  | \$21,884,250                                | 22                | \$16,345,395                            | 15                       | 75%                              | 68%                      |
| 2017-18  | \$34,528,573                                | 26                | \$19,170,439                            | 17                       | 56%                              | 65%                      |
| 2018-19  | \$19,474,656                                | 18                | \$16,705,786                            | 14                       | 86%                              | 78%                      |
| <b>Total</b>   | <b>\$107,660,996</b>                        | <b>104</b>        | <b>\$76,867,741</b>                     | <b>73</b>                | <b>71%</b>                       | <b>70%</b>               |

Seventy-four percent of total digital media production budgets submitted for financing were funded by the Aboriginal program from 2014-2015 to 2018-2019. One hundred percent of digital media production budgets submitted for funding was provided in 2016-2017, while only 54% of financing was provided in 2015-2016.

Figure 4: Total Budgets of Development Applications and of Funded Development Projects, Aboriginal Program, by Year, 2014-2015 to 2018-2019

| <b>Convergent Digital Media Production Proportion of Total Budgets That Were Supported</b> |                         |                   |                      |                          |                        |                          |
|--|-------------------------|-------------------|----------------------|--------------------------|------------------------|--------------------------|
|  | <i>Amount Requested</i> | <i># Projects</i> | <i>Amount Funded</i> | <i># Projects Funded</i> | <i>% Amount Funded</i> | <i>% Projects Funded</i> |
| 2014-15  | \$1,589,320             | 20                | \$1,194,770          | 13                       | 75%                    | 65%                      |
| 2015-16  | \$1,655,291             | 18                | \$896,876            | 12                       | 54%                    | 67%                      |
| 2016-17  | \$1,088,172             | 8                 | \$1,088,172          | 8                        | 100%                   | 100%                     |
| 2017-18  | \$1,843,700             | 16                | \$1,340,700          | 12                       | 73%                    | 75%                      |
| 2018-19  | \$1,227,719             | 12                | \$1,029,579          | 10                       | 84%                    | 83%                      |
| <b>Total</b>   | <b>\$7,404,202</b>      | <b>74</b>         | <b>\$5,550,097</b>   | <b>55</b>                | <b>75%</b>             | <b>74%</b>               |

Of the productions supported, the Aboriginal Program provided a share of 42% of all financing over the five years. Financing ranged from 39% of all funded production budgets in 2016-2017 to 47% in 2015-2016.

Figure 5: Percentage of Total Production Budgets Supported by the Program, by Year, 2014-2015 to 2018-2019

| Television Production – Percentage of Total Financing Provided by the Program |   |   |  |
|---|---|---|--|
|   | <i>Total Amount of Funding Provided</i> | <i>Total Budgets of Funded Projects</i> | <i>Share of Financing of Total Budgets</i> |
| 2014-2015   | \$5,422,340                             | \$12,774,178                            | 42%  |
| 2015-2016   | \$5,524,837                             | \$11,871,943                            | 47%  |
| 2016-2017   | \$6,421,407                             | \$16,345,395                            | 39%  |
| 2017-2018   | \$7,901,250                             | \$19,170,439                            | 41%  |
| 2018-2019   | \$6,977,981                             | \$16,705,786                            | 42%  |
| <b>Total</b>  | <b>\$32,247,815</b>                     | <b>\$76,867,741</b>                     | <b>42%</b>                                 |

### 1.3 Development Financing

The Aboriginal Program provided a total of \$3.2 M in development financing from 2014-2015 to 2018-2019. Television development financing totalled \$3 M, while development financing for convergent digital media projects amounted to \$112K. No digital media development financing was provided in the years 2017-2018 and 2018-2019.

Figure 6: Total Financing Provided to Development Projects, Aboriginal Program, by Year, 2014-2015 to 2018-2019

|              | <b>Television Budgets</b> | <b>Development</b>     | <b>Digital Media Development</b> |                        | <b>All Development</b>             |
|--------------|---------------------------|------------------------|----------------------------------|------------------------|------------------------------------|
|              | <i>Number of Projects</i> | <i>Total Financing</i> | <i>Number of Projects</i>        | <i>Total Financing</i> | <i>Total Development Financing</i> |
| 2014-2015    | 10                        | \$513,945              | 3                                | \$41,820               | \$555,765                          |
| 2015-2016    | 12                        | \$507,616              | 2                                | \$54,500               | \$547,116                          |
| 2016-2017    | 11                        | \$634,467              | 1                                | \$14,850               | \$649,317                          |
| 2017-2018    | 7                         | \$699,400              | 0                                | \$0                    | \$699,400                          |
| 2018-2019    | 8                         | \$699,200              | 0                                | \$0                    | \$699,200                          |
| <b>Total</b> | <b>48</b>                 | <b>\$3,054,628</b>     | <b>6</b>                         | <b>\$111,170</b>       | <b>\$3,165,798</b>                 |

Of the projects funded, the Program financed 72% of total development budgets in the five years examined. Financing ranged from 68% of development budgets in 2015-2016 to 75% in 2017-2018.

Figure 7: Percentage of Total Development Budgets Supported by the Program, by Year, 2014-2015 to 2018-2019



| <b>Television Development – Percentage of Total Financing Provided by the Program</b> |   |   |                           |
|---|---|---|---------------------------|
|   | <i>Total Budgets of Funded Projects</i> | <i>Total Amount of Funding Provided</i> | <i>Share of Financing</i> |
| 2014-2015   | \$705,014                               | \$513,945                               | 73%                       |
| 2015-2016   | \$741,401                               | \$507,616                               | 68%                       |
| 2016-2017   | \$881,696                               | \$634,467                               | 72%                       |
| 2017-2018   | \$935,591                               | \$699,400                               | 75%                       |
| 2018-2019   | \$972,488                               | \$699,200                               | 72%                       |
| <b>Total</b>  | <b>\$4,236,190</b>                      | <b>\$3,054,628</b>                      | <b>72%</b>                |

The Aboriginal Program provided pre-development financing to a total of 59 television projects with total commitments of \$882K. The highest number of pre-development projects was supported in 2015-2016 (23 projects in all), as compared to only six projects financed in 2018-2019.

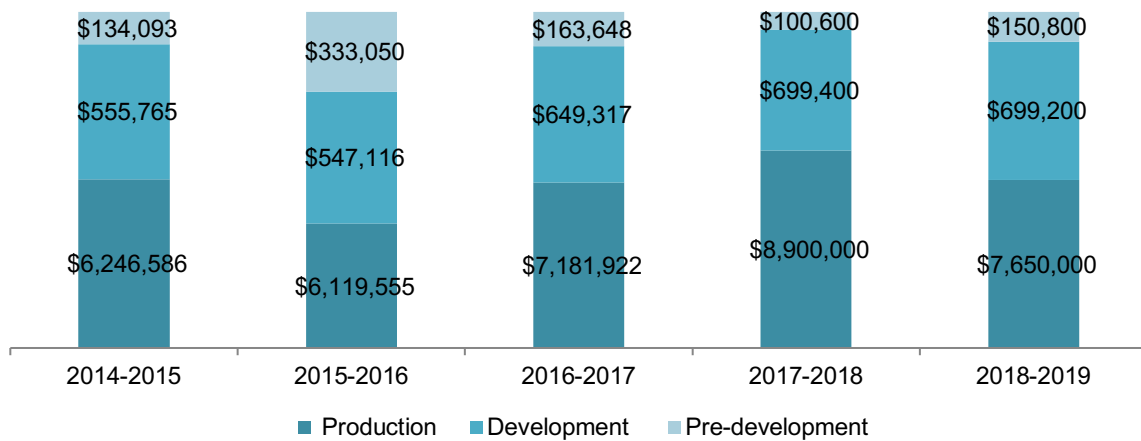
Figure 8: Total Pre-Development Financing Provided by the Aboriginal Program, by Year, 2014-2015 to 2018-2019

| <b>Television Pre-Development Financing</b> |                           |                        |
|---|---------------------------|------------------------|
|   | <i>Number of Projects</i> | <i>Total Financing</i> |
| 2014-2015                                   | 10                        | \$134,093              |
| 2015-2016                                   | 23                        | \$333,050              |
| 2016-2017                                   | 12                        | \$163,648              |
| 2017-2018                                   | 8                         | \$100,600              |
| 2018-2019                                   | 6                         | \$150,800              |
| <b>Total</b>                                | <b>59</b>                 | <b>\$882,191</b>       |

Figure 9 provides a summary of all financing provided through the Aboriginal Program in the years from 2014-2015 to 2018-2019.

Figure 9: Summary of Total Financing Provided by the Aboriginal Program, by Program Component (Production, Development and Pre-Development) and by Year, 2014-2015 to 2018-2019

Total Financing Provided by the Aboriginal Program, 2014-2015 to 2018-2019



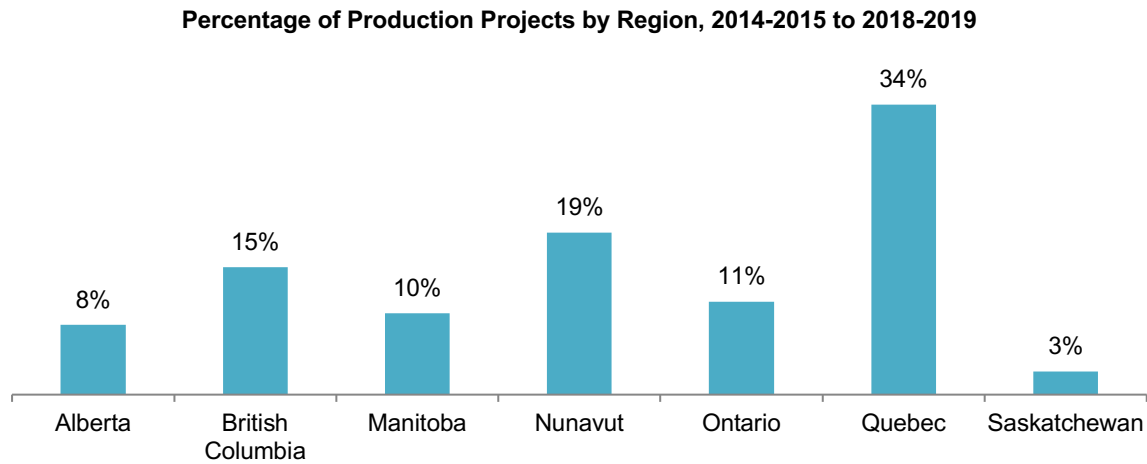
#### 1.4 Total Financing By Region

A total of 73 television production projects received financing from the Aboriginal Program in the years from 2014-2016 to 2018-2019. Thirty-four percent of projects financed were produced by companies based in Quebec; nineteen percent were produced by Nunavut based companies and fifteen percent of financed projects were produced in British Columbia. Ontario and Manitoba had 11% and 10% of financed projects, respectively. Eight percent of funded projects were in Alberta, and 3% were in Saskatchewan.

Figure 10: Number of Television Production Projects Financed, by Region and by Year, 2014-2015 to 2018-2019

| Total Number of Productions Financed by Region (Television only) |           |           |           |           |           |       |
|--|-----------|-----------|-----------|-----------|-----------|-------|
|  | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 | Total |
| Alberta  | 1         | 1         | 1         | 0         | 3         | 6     |
| British Columbia   | 2         | 3         | 0         | 5         | 1         | 11    |
| Manitoba   | 1         | 2         | 1         | 2         | 1         | 7     |
| Nunavut  | 2         | 1         | 4         | 3         | 4         | 14    |
| Ontario  | 2         | 0         | 1         | 3         | 2         | 8     |
| Quebec   | 6         | 5         | 7         | 4         | 3         | 25    |
| Saskatchewan   | 1         | 0         | 1         | 0         | 0         | 2     |
| Total  | 15        | 12        | 15        | 17        | 14        | 73    |

Figure 11: Total Television Production Budgets Financed, by Region, 2014-2015 to 2018-2019



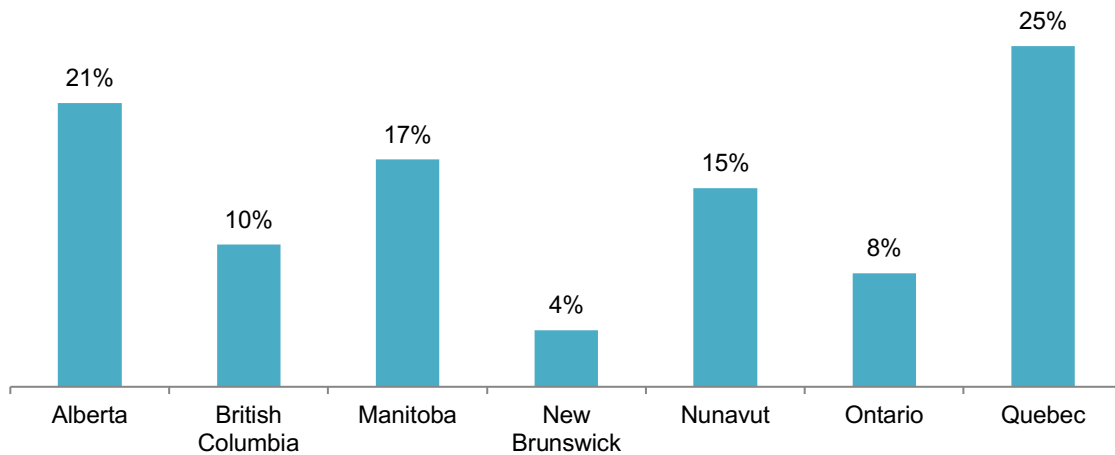
A total of 48 television development projects were financed through the program between 2014-2015 and 2018-2019. The greatest number of development projects were financed in Quebec (12 in all, or 25% of all projects financed). Alberta had the second highest number of productions financed (10 in all, or 21%). Manitoba and Nunavut had 8 and 7 projects financed, respectively. These accounted for 17% of all projects for Manitoba and 15% for Nunavut. British Columbia had 5 projects financed, or 10%, while Ontario had 4 projects financed (8%). Two television productions were financed out of New Brunswick (4%).

Figure 12: Number of Development Projects Financed, by Region and by Year, 2014-2015 to 2018-2019

| Total Number of Development Projects Financed by Region (Television only) |           |           |           |           |           |       |
|---|-----------|-----------|-----------|-----------|-----------|-------|
|   | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 | Total |
| Alberta   | 1         | 1         | 4         | 1         | 3         | 10    |
| British Columbia  | 2         | 2         | 1         | 0         | 0         | 5     |
| Manitoba  | 2         | 2         | 1         | 2         | 1         | 8     |
| New Brunswick   | 0         | 1         | 1         | 0         | 0         | 2     |
| Nunavut   | 2         | 1         | 0         | 2         | 2         | 7     |
| Ontario   | 0         | 2         | 1         | 1         | 0         | 4     |
| Quebec  | 3         | 3         | 3         | 1         | 2         | 12    |
| Total   | 10        | 12        | 11        | 7         | 8         | 48    |

Figure 13: Total Development Financing Provided by the Aboriginal Program by Region, 2014-2015 to 2018-2019

Percentage of Development Projects, by Region, 2014-2015 to 2018-2019



In all, 59 projects were financed by the Aboriginal Program in the pre-development stage. The greatest number were financed in British Columbia (25 in all or 44%), followed by Manitoba, with 11 projects (19%). Toronto and Quebec had 10 and 8 projects financed in pre-development, respectively (or 17% and 14%, respectively).

Figure 14: Number of Pre-Development Projects Financed, by Region and by Year, 2014-2015 to 2018-2019

| Total Number of Pre-Development Projects Financed by Region (Television only) |           |           |           |           |           |       |
|---|-----------|-----------|-----------|-----------|-----------|-------|
|   | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 | Total |
| Alberta   | 1         | 1         | 0         | 0         | 0         | 2     |
| British Columbia  | 3         | 11        | 5         | 2         | 4         | 25    |
| Manitoba  | 3         | 4         | 4         | 0         | 0         | 11    |
| Ontario   | 0         | 0         | 0         | 1         | 0         | 1     |
| Quebec  | 1         | 3         | 1         | 3         | 0         | 8     |
| Saskatchewan  | 0         | 1         | 0         | 0         | 0         | 1     |
| Toronto   | 2         | 2         | 2         | 2         | 2         | 10    |

Note: One project region not specified.

### 1.5 Production Companies' Access to Funding Over the Five-Year Period

In the five-year period examined, a total of 74 Indigenous production companies received production financing for a television project through the Aboriginal Program. Just over half of all companies (53%) received funding for one television production in the years from 2014-2015 to 2018-2019. Twenty-two percent of companies received funding for two television productions and 16% of companies received funding for 3 to 5 television production projects. A small number of companies (4 in all) received production funding for 6 to 10 television projects, and three companies received production funding for more than 10 television projects.

Figure 15: Analysis of Recurrent Funding, Television Productions, 2014-2015 to 2018-2019

| Recurrent Funding of Companies for the Production of Television Projects |                            |                   |
|--|----------------------------|-------------------|
| <i>Number of Funded Productions (TV)</i>                                 | <i>Number of Companies</i> | <i>Percentage</i> |
| > 10 funded productions  | 3                          | 4%                |
| 6 - 10 productions   | 4                          | 5%                |
| 3 - 5 productions  | 12                         | 16%               |
| 2 productions  | 16                         | 22%               |
| 1 production   | 39                         | 53%               |
| <b>Total</b>   | <b>74</b>                  | <b>100%</b>       |

Thirty-three of the companies funded in television production also received funding for the production of a convergent digital media project. Over half (58%) received funding for the production of one convergent digital media project. Twenty-one percent of companies received funding for the production of two convergent digital media projects. Eighteen percent of companies were funded to produce between 3 and 5 project and one company received funding for the production of seven convergent digital media projects.

Figure 16: Analysis of Recurrent Funding, Convergent Digital Media Productions, 2014-2015 to 2018-2019

| Recurrent Funding of Companies for the Production of Convergent Digital Media Projects |                            |                   |
|--|----------------------------|-------------------|
| <i>Number of Funded Productions (DM)</i>   | <i>Number of Companies</i> | <i>Percentage</i> |
| > 5 productions  | 1                          | 3%                |
| 3 - 5 productions  | 6                          | 18%               |
| 2 productions  | 7                          | 21%               |
| 1 production   | 19                         | 58%               |
| <b>Total</b>   | <b>33</b>                  | <b>100%</b>       |

## 2. Characteristics of Productions Supported by the Aboriginal Program

### 2.1 Total Budgets of Projects Supported in Production

The 73 television productions financed through the Aboriginal Program in the years examined had production budgets of \$76.9 M in total, between 2014-2015 and 2018-2019. Fifty-five convergent digital media productions had production budgets totalling \$5.6M in the same period.

Figure 17: Total Number and Production Budgets of Projects Financed by the Aboriginal Program, by Type of Production and by Year, 2014-2015 to 2018-2019

|              | Television Productions |                     | Convergent Digital Media Productions |                    |
|--------------|------------------------|---------------------|--------------------------------------|--------------------|
|              | Number                 | Total Budgets       | Number                               | Total Budgets      |
| 2014-2015    | 15                     | \$12,774,178        | 13                                   | \$1,194,770        |
| 2015-2016    | 12                     | \$11,871,943        | 12                                   | \$896,876          |
| 2016-2017    | 15                     | \$16,345,395        | 8                                    | \$1,088,172        |
| 2017-2018    | 17                     | \$19,170,439        | 12                                   | \$1,340,700        |
| 2018-2019    | 14                     | \$16,705,786        | 10                                   | \$1,029,579        |
| <b>Total</b> | <b>73</b>              | <b>\$76,867,741</b> | <b>55</b>                            | <b>\$5,550,097</b> |

## 2.2 Average Production Budgets

The majority of funded productions were documentaries, with 42 television documentary productions and 33 convergent digital media documentary productions. Television programs for children and youth accounted for 30% of all television productions and 33% of all convergent digital media productions. Eleven percent of funded television productions were drama (5% of digital media projects). One convergent production was in the genre of variety and performing arts.

Figure 18: Number of Television Productions Financed by the Aboriginal Program, by Genre, 2014-2015 to 2018-2019

|                           | Television            |             | Convergent Digital Media |             |
|---------------------------|-----------------------|-------------|--------------------------|-------------|
|                           | Number of Productions | Percentage  | Number of Productions    | Percentage  |
| Documentary               | 42                    | 58%         | 33                       | 60%         |
| Children & Youth          | 22                    | 30%         | 18                       | 33%         |
| Drama                     | 8                     | 11%         | 3                        | 5%          |
| Variety & Performing Arts | 1                     | 1%          | 1                        | 2%          |
| <b>Total</b>              | <b>73</b>             | <b>100%</b> | <b>55</b>                | <b>100%</b> |

Figures 19 and 20 provide a breakdown of the number of productions financed by genre and by year, for television and digital media, respectively.

Figure 19: Number of Television Productions Financed by the Aboriginal Program, by Genre and by Year, 2014-2015 to 2018-2019

| Number of Funded Television Productions by Genre |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
|  | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 |
| Children & Youth                                 | 5         | 6         | 6         | 3         | 2         |
| Documentary                                      | 9         | 5         | 8         | 10        | 10        |
| Drama  | 1         | 1         | 1         | 3         | 2         |
| Variety & Performing Arts                        | 0         | 0         | 0         | 1         | 0         |
| <b>Total</b>                                     | <b>15</b> | <b>12</b> | <b>15</b> | <b>17</b> | <b>14</b> |

Figure 20: Number of Convergent Digital Media Productions Financed by the Aboriginal Program, by Genre and by Year, 2014-2015 to 2018-2019

| Number of Funded Convergent Digital Media Productions by Genre |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
|  | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 |
| Children & Youth   | 5         | 6         | 3         | 2         | 2         |
| Documentary  | 8         | 5         | 5         | 8         | 7         |
| Drama  | 0         | 1         | 0         | 1         | 1         |
| Variety & Performing Arts                                      | 0         | 0         | 0         | 1         | 0         |
| <b>Total</b>   | <b>13</b> | <b>12</b> | <b>8</b>  | <b>12</b> | <b>10</b> |

Average production budgets, on a per-hour of production basis, fluctuated from year to year. Average per-hour budgets for children's and youth programming ranged from \$139K per hour in 2017-2018 to \$269K in 2016-2017. Documentary production budgets ranged from \$173K in 2014-2015, 2017-2018 and in 2018-2019, to a high of \$198K in 2016-2017.

Figure 21: Average Per-hour Production Budgets for Television Projects Financed by the Aboriginal Program, by Genre and by Year, 2014-2015 to 2018-2019

| Average Per-hour Television Production Budgets |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
|  | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 |
| Children & Youth                               | \$186,260 | \$157,680 | \$268,948 | \$138,827 | \$185,093 |
| Documentary                                    | \$173,059 | \$190,482 | \$198,167 | \$172,345 | \$172,272 |

### 2.3 Television Production Financing by Genres and Formats

The Aboriginal Program provided a total of \$27.5 M for the production of television series over the five years examined, representing 85% of all financing. The program also provided \$2.7 M for feature film production, \$1.8 M for one-off programs and \$281K for mini-series.

Figure 22: Total Aboriginal Program Funding and Number of Projects for Television Supported by the Aboriginal Program, by Format and by Year, 2014-2015 to 2018-2019

| Total Funding and Number of Projects for Television |                    |          |                  |          |                    |          |                     |           |                     |           |
|---|--------------------|----------|------------------|----------|--------------------|----------|---------------------|-----------|---------------------|-----------|
|   | Feature Film       |          | Mini-series      |          | One-off            |          | Series              |           | Total               |           |
|   | CMF \$             | #        | CMF \$           | #        | CMF \$             | #        | CMF \$              | #         | CMF \$              | #         |
| 2014-15   | \$400,000          | 1        | \$0              |          | \$108,751          | 1        | \$4,913,589         | 13        | \$5,422,340         | 15        |
| 2015-16   | \$750,000          | 1        | \$0              |          | \$109,433          | 1        | \$4,665,404         | 10        | \$5,524,837         | 12        |
| 2016-17   | \$0                |          | \$0              |          | \$395,000          | 2        | \$6,026,407         | 13        | \$6,421,407         | 15        |
| 2017-18   | \$750,000          | 1        | \$0              |          | \$700,285          | 2        | \$6,450,965         | 14        | \$7,901,250         | 17        |
| 2018-19   | \$787,499          | 1        | \$281,300        | 1        | \$460,000          | 1        | \$5,449,182         | 11        | \$6,977,981         | 14        |
| <b>Total</b>  | <b>\$2,687,499</b> | <b>4</b> | <b>\$281,300</b> | <b>1</b> | <b>\$1,773,469</b> | <b>7</b> | <b>\$27,505,547</b> | <b>61</b> | <b>\$32,247,815</b> | <b>73</b> |

When looked at through the lens of genres, Figure 23 shows that the majority of series financing was provided for documentary series: a total of \$17.5 M, accounting for 64% of all series financing. This was followed by \$8.6 M for kids programming series.

Drama series financing totalled less than \$1 M over the five years examined and accounted for only 3% of all series financing.

**Figure 23: Total Aboriginal Program Funding and Number of Projects for Television Supported by the Aboriginal Program, by Genre and Format, 2014-2015 to 2018-2019**

| Total CMF Funding and Number of Projects for Television, by Genre and Format |                    |          |                  |          |                    |          |                     |           |                     |           |
|--|--------------------|----------|------------------|----------|--------------------|----------|---------------------|-----------|---------------------|-----------|
|  | Feature Film       |          | Mini-series      |          | One-off            |          | Series              |           | Total               |           |
|  | CMF \$             | #        | CMF \$           | #        | CMF \$             | #        | CMF \$              | #         | Total CMF \$        | #         |
| Kids*  | \$0                |          | \$0              |          | \$284,500          | 1        | \$8,580,761         | 21        | \$8,865,261         | 22        |
| Documentary  | \$0                |          | \$281,300        | 1        | \$439,865          | 4        | \$17,473,411        | 37        | \$18,194,576        | 42        |
| Drama  | \$2,687,499        | 4        | \$0              |          | \$1,049,104        | 2        | \$912,257           | 2         | \$4,648,860         | 8         |
| VAPA**   | \$0                |          | \$0              |          | \$0                |          | \$539,118           | 1         | \$539,118           | 1         |
| <b>Total</b>   | <b>\$2,687,499</b> | <b>4</b> | <b>\$281,300</b> | <b>1</b> | <b>\$1,773,469</b> | <b>7</b> | <b>\$27,505,547</b> | <b>61</b> | <b>\$32,247,815</b> | <b>73</b> |

\* Children and Youth Programming

\*\* Variety and Performing Arts Programming

**Figure 24: Summary of Television Production Financing from the Aboriginal Program by Formats and Genres, 2014-2015 to 2018-2019**

| Total Funding and Percentage by Genre and Format, Television Production, All Years |                    |             |                  |             |                    |             |                     |             |                     |             |  |
|--|--------------------|-------------|------------------|-------------|--------------------|-------------|---------------------|-------------|---------------------|-------------|--|
|  | Feature Film       | %           | Mini-series      | %           | One-off            | %           | Series              | %           | Total               | %           |  |
| Kids*  | 0                  | 0%          | 0                | 0%          | \$284,500          | 16%         | \$8,580,761         | 31%         | \$8,865,261         | 27%         |  |
| Docs**   | 0                  | 0%          | \$281,300        | 100%        | \$439,865          | 25%         | \$17,473,411        | 64%         | \$18,194,576        | 56%         |  |
| Drama  | \$2,687,499        | 100%        | 0                | 0%          | \$1,049,104        | 59%         | \$912,257           | 3%          | \$4,648,860         | 14%         |  |
| VAPA**   | 0                  | 0%          | 0                | 0%          | 0                  | 0%          | \$539,118           | 2%          | \$539,118           | 2%          |  |
| <b>Total</b>   | <b>\$2,687,499</b> | <b>100%</b> | <b>\$281,300</b> | <b>100%</b> | <b>\$1,773,469</b> | <b>100%</b> | <b>\$27,505,547</b> | <b>100%</b> | <b>\$32,247,815</b> | <b>100%</b> |  |

\* Children and Youth Programming

\*\* Documentaries

\*\*\* Variety and Performing Arts Programming

Figures 25 and 26 provide a more detailed analysis of funding for drama and documentary genre programming by formats.

**Figure 25: Total Aboriginal Program Funding and Number of Projects for Television Drama Supported by the Aboriginal Program, by Format and by Year, 2014-2015 to 2018-2019**

| Total CMF Funding and Number of Projects for Television, Drama Formats Only |              |   |           |   |           |   |             |   |  |
|---|--------------|---|-----------|---|-----------|---|-------------|---|--|
|   | Feature Film |   | One-off   |   | Series    |   | Total       |   |  |
|   | CMF \$       | # | CMF \$    | # | CMF \$    | # | CMF \$      | # |  |
| 2014-2015   | \$400,000    | 1 | \$0       | 0 | \$0       | 0 | \$400,000   | 1 |  |
| 2015-2016   | \$750,000    | 1 | \$0       | 0 | \$0       | 0 | \$750,000   | 1 |  |
| 2016-2017   | \$0          | 0 | \$0       | 0 | \$356,000 | 1 | \$356,000   | 1 |  |
| 2017-2018   | \$750,000    | 1 | \$589,104 | 1 | \$556,257 | 1 | \$1,895,361 | 3 |  |
| 2018-2019   | \$787,499    | 1 | \$460,000 | 1 | \$0       | 0 | \$1,247,499 | 2 |  |



|              |                    |          |                    |          |                  |          |                    |          |
|--------------|--------------------|----------|--------------------|----------|------------------|----------|--------------------|----------|
| <b>Total</b> | <b>\$2,687,499</b> | <b>4</b> | <b>\$1,049,104</b> | <b>2</b> | <b>\$912,257</b> | <b>2</b> | <b>\$4,648,860</b> | <b>8</b> |
|--------------|--------------------|----------|--------------------|----------|------------------|----------|--------------------|----------|

Figure 26: Total Aboriginal Program Funding and Number of Projects for Television Documentary Supported by the Aboriginal Program, by Format and by Year, 2014-2015 to 2018-2019

| Total CMF Funding and Number of Projects for Television, Documentary Formats Only |                  |          |                  |          |                     |           |                   |           |
|---|------------------|----------|------------------|----------|---------------------|-----------|-------------------|-----------|
|   | Feature Film     |          | One-off          |          | Series              |           | Total             |           |
|   | CMF \$           | #        | CMF \$           | #        | CMF \$              | #         | CMF \$            | #         |
| 2014-2015   | \$0              | 0        | \$108,751        | 1        | \$3,096,073         | 8         | \$3,204,824       | 9         |
| 2015-2016   | \$0              | 0        | \$109,433        | 1        | \$1,825,499         | 4         | \$1,934,932       | 5         |
| 2016-2017   | \$0              | 0        | \$110,500        | 1        | \$3,472,382         | 7         | \$3,582,882       | 8         |
| 2017-2018   | \$0              | 0        | \$111,181        | 1        | \$4,296,031         | 9         | \$4,407,212       | 10        |
| 2018-2019   | \$281,300        | 1        | \$0              | 0        | \$478,3426          | 9         | \$5,064,726       | 10        |
| <b>Total</b>  | <b>\$281,300</b> | <b>1</b> | <b>\$439,865</b> | <b>4</b> | <b>\$17,473,411</b> | <b>37</b> | <b>18,194,576</b> | <b>42</b> |

## 2.4 Language of Production

Projects funded through the Aboriginal Program must have a minimum of 20% of content in an Aboriginal language. Two years of funding (2017-2018 and 2018-2019) were analysed with respect to how projects are meeting the language requirement. Of the 31 projects financed in production in the years 2017-2018 and 2018-2019, just under half, or 48%, met the minimum Indigenous language requirement. Fifty-two percent of projects exceeded the language requirement, usually by achieving a language content of 50% or more.<sup>1</sup>

Development projects are not subject to the language requirement.

Figure 27: Breakdown of Projects Meeting or Exceeding the Minimum Indigenous Language Requirement, 2017-2018 to 2018-2019

| Productions that met only the minimum 20% Indigenous language requirement |                           |                      |
|---|---------------------------|----------------------|
|   | <i>Number of projects</i> | <i>Total budgets</i> |
| Exceeded the minimum  | 16                        | \$19,650,016         |
| At the minimum  | 15                        | \$17,566,909         |
| <b>Total</b>  | <b>31</b>                 | <b>\$37,216,925</b>  |

Note: projects exceeding the minimum were usually at 50% or more

In the two years 2017-2018 and 2018-2019, a total of 14 development projects and 29 production projects were primarily in either English, French or an Aboriginal language. Figure 28 provides a breakdown of these projects by language, and total budgets. Two projects were produced primarily in French. These projects have not been included in the analysis below for reasons of confidentiality.

<sup>1</sup> Source: Canada Media Fund.

Figure 28: Number of Projects and Total Budgets, by Language, 2017-2018 and 2018-2019 Combined

|              | Development        |                    | Production         |                     |
|--------------|--------------------|--------------------|--------------------|---------------------|
|              | Number of Projects | Total Budgets      | Number of Projects | Total Budgets       |
| Indigenous   | 7                  | \$640,727          | 12                 | \$13,416,682        |
| English      | 7                  | \$1,182,118        | 17                 | \$22,639,999        |
| <b>Total</b> | <b>14</b>          | <b>\$1,822,845</b> | <b>29</b>          | <b>\$36,056,681</b> |

Note: Two French-language projects excluded for reasons of confidentiality.

Figures 29 and 30 provide an analysis of projects by language and region for the years 2017-2018 to 2018-2019, inclusively.

Figure 29: Number of Production Projects by Language and by Region, 2017-2018 to 2018-2019

| Alberta   |         | BC      | Manitoba |         | Nunavut   | Ontario  |         | Quebec  |        |         |
|-----------|---------|---------|----------|---------|-----------|----------|---------|---------|--------|---------|
| Blackfoot | English | English | Michif   | English | Inuktitut | Oji-Cree | English | Mi'kmaq | French | English |
| 1         | 2       | 6       | 1        | 2       | 7         | 1        | 4       | 2       | 2      | 3       |

Figure 30: Number of Development Projects by Language and by Region, 2017-2018 to 2018-2019

| Alberta |                   | Manitoba |        | Nunavut |           | Ontario | Quebec |           |
|---------|-------------------|----------|--------|---------|-----------|---------|--------|-----------|
| English | Michif, Blackfoot | English  | Ojibwe | English | Inuktitut | English | French | Inuktitut |
| 3       | 1                 | 2        | 1      | 1       | 3         | 1       | 1      | 2         |

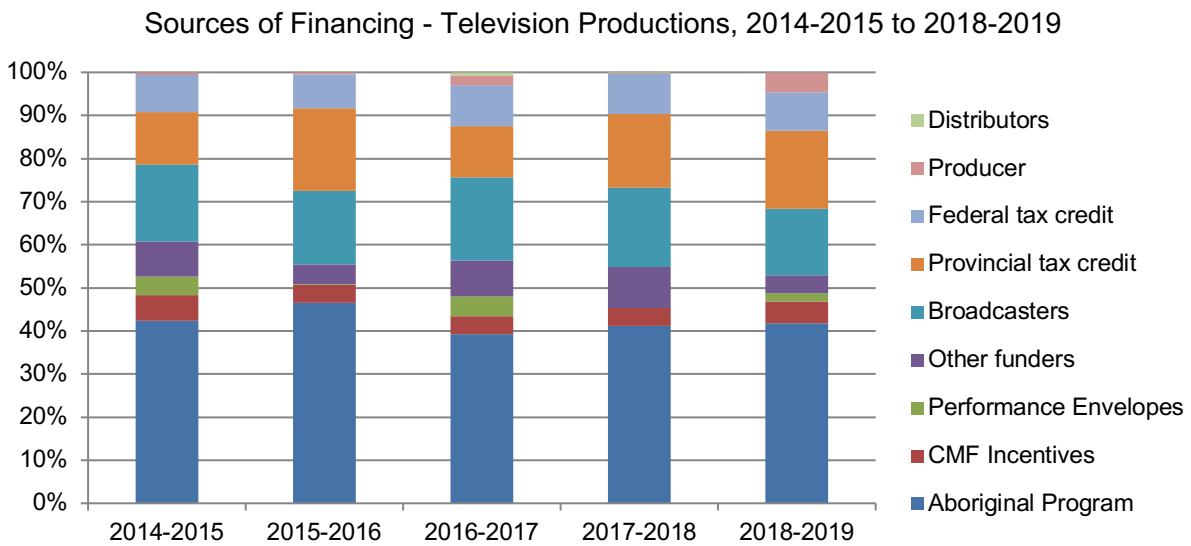
## 2.5 Financial Structures of Productions

Funding from the Aboriginal Program accounted for 42% of all production financing, on average, between 2014-2015 and 2018-2019. Other incentives of the CMF (i.e. Anglophone Minority Incentive, Convergent Digital Media Incentive, English Regional Bonus and Northern Incentive) accounted for about 5% of total production financing, on average. Broadcasters contributed 18% of financing, on average, and another 2% through their performance envelopes. Distributors accounted for only .2% of financing. Federal tax credits contributed 9% of financing, as compared to 16% of financing from provincial tax credits. Other funds contributed 7% of financing, on average, while producers accounted for an average of 2% of financing from 2014-2015 to 2018-2019.

Figure 31: Financing Structures of Television Productions Funded Through the Aboriginal Program, by Year, 2014-2015 to 2018-2019

| Financing Structures of Television Productions |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
|  | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 |
| Aboriginal Program                             | 42%       | 47%       | 39%       | 41%       | 42%       |
| CMF Incentives                                 | 6%        | 4%        | 4%        | 4%        | 5%        |
| Performance Envelopes                          | 4%        | 0%        | 5%        | 0%        | 2%        |
| Other funders                                  | 8%        | 5%        | 8%        | 9%        | 4%        |
| Broadcasters                                   | 18%       | 17%       | 19%       | 18%       | 16%       |
| Provincial tax credit                          | 12%       | 19%       | 12%       | 17%       | 18%       |
| Federal tax credit                             | 9%        | 8%        | 10%       | 9%        | 9%        |
| Producer                                       | 1%        | 1%        | 2%        | 0%        | 5%        |
| Distributors                                   | 0%        | 0%        | 1%        | 0%        | 0%        |
| Total  | 100%      | 100%      | 100%      | 100%      | 100%      |

Figure 32: Financing Structures of Television Productions Funded Through the Aboriginal Program, by Year, 2014-2015 to 2018-2019



From 2014-2015 to 2018-2018, the CMF accounted for 45% to 53% of all financing through a combination of the Aboriginal Program, various Incentives and broadcaster Performance Envelopes.

Figure 33: Proportion of Television Production Financing Provided by All Programs of the Canada Media Fund to Projects Supported in the Aboriginal Program, by Year, 2014-2015 to 2018-2019

| Sources of Production Financing of Projects Funded by the Aboriginal Program |                  |                     |
|--|------------------|---------------------|
|  | CMF All Programs | All Other Financing |
| 2014-2015  | 53%              | 47%                 |
| 2015-2016  | 51%              | 49%                 |
| 2016-2017  | 48%              | 52%                 |
| 2017-2018  | 45%              | 55%                 |
| 2018-2019  | 49%              | 51%                 |

APTN accounts for 75% of all projects receiving a broadcaster license fee in production. NITV provided broadcast licence fees to 12% of all production projects, followed by CBC, which licenced 5% of all projects funded in production.

Figure 34: Number of Projects Financed in Television Production, by Broadcaster, 2014-2015 to 2018-2019

| Number of Projects Financed in Production, by Broadcaster |         |         |         |         |         |       |     |
|---|---------|---------|---------|---------|---------|-------|-----|
|   | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | Total | %   |
| APTN  | 25      | 20      | 19      | 13      | 9       | 86    | 75% |
| NITV  | 3       | 2       | 4       | 2       | 3       | 14    | 12% |
| CBC   | 0       | 1       | 1       | 3       | 1       | 6     | 5%  |
| Canal D   | 0       | 2       | 1       | 1       | 0       | 4     | 3%  |
| Radio-Canada  | 0       | 0       | 2       | 1       | 0       | 3     | 3%  |
| Knowledge Network   | 2       | 0       | 0       | 0       | 0       | 2     | 2%  |
| Hollywood Suite   | 0       | 0       | 0       | 0       | 1       | 1     | 1%  |

A project is counted more than once if there is more than one licensee.

The Aboriginal Program contributed 69% of financing in the production budgets of convergent digital media components, on average, from 2014-2015 to 2018-2019. Total financing from all programs of the CMF represented 72% on average. Broadcasters contributed an average of 21% of financing for the production of convergent digital media components.

Figure 35: Financing Structures of Convergent Digital Media Productions Funded Through the Aboriginal Program, by Year, 2014-2015 to 2018-2019

#### Financing Structures of Convergent Digital Media Productions

|                       | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 |
|-----------------------|-----------|-----------|-----------|-----------|-----------|
| Aboriginal Program    | 69%       | 66%       | 70%       | 75%       | 65%       |
| Broadcasters          | 18%       | 20%       | 21%       | 23%       | 21%       |
| Other funds           | 7%        | 3%        | 7%        | 2%        | 4%        |
| CMF Incentives        | 1%        | 6%        | 0%        | 0%        | 10%       |
| Producer              | 3%        | 0%        | 3%        | 0%        | 0%        |
| Distributor           | 2%        | 2%        | 0%        | 0%        | 0%        |
| Provincial tax credit | 0%        | 3%        | 0%        | 0%        | 0%        |
| Total                 | 100%      | 100%      | 100%      | 100%      | 100%      |

A project is counted more than once if there is more than one licensee.

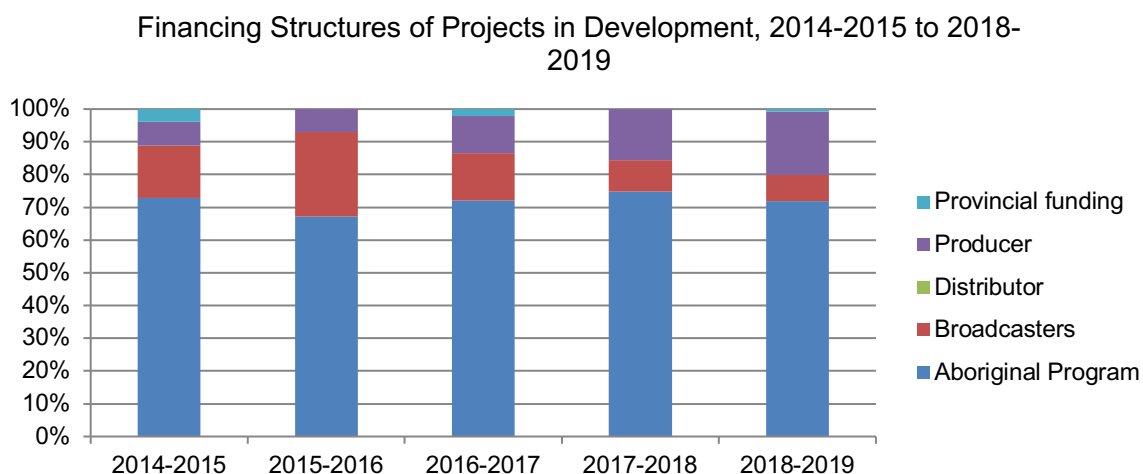
## 2.6 Financial Structures of Projects in Development

On average, the Aboriginal Program contributed 72% of financing for the development of Indigenous projects. Broadcaster license fees accounted for an average of 15% of financing. Producer investments represented 12% of all financing, on average.

Figure 36: Financing Structures of Projects in Development, by Year, 2014-2015 to 2018-2019

| Financing Structures of Development Projects |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
|  | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 |
| Aboriginal Program                           | 73%       | 67%       | 72%       | 75%       | 72%       |
| Broadcasters                                 | 16%       | 26%       | 15%       | 10%       | 8%        |
| Producer                                     | 7%        | 7%        | 11%       | 16%       | 19%       |
| Provincial funding                           | 4%        | 0%        | 2%        | 0%        | 0.8%      |
| Distributor                                  | 0%        | 0.1%      | 0%        | 0%        | 0%        |

Figure 37: Financing Structures of Projects in Development, by Year, 2014-2015 to 2018-2019



Half of all projects receiving a broadcast licence fee in development did so from APTN. A further 11% of projects received development financing from NITV and YES TV, respectively. Bandwidth Digital Releasing Ltd. and the Adam Beach Film Institute accounted for 9% and 6% of broadcast license fees, respectively, in development projects.

Figure 38: Number of Projects in Development with a Broadcast Licence Fee, by Broadcaster, 2014-2015-2018-2019

| Number of Projects Financed in Development, by Broadcaster |           |           |           |           |           |       |     |
|--|-----------|-----------|-----------|-----------|-----------|-------|-----|
|  | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 | Total | %   |
| APTN   | 8         | 10        | 6         | 1         | 2         | 27    | 50% |
| NITV   | 0         | 2         | 0         | 2         | 2         | 6     | 11% |
| YES TV   | 2         | 0         | 2         | 1         | 1         | 6     | 11% |
| Bandwidth Digital Releasing Ltd.                           | 0         | 0         | 4         | 0         | 1         | 5     | 9%  |
| Adam Beach Film Institute                                  | 2         | 1         | 0         | 0         | 0         | 3     | 6%  |
| Hollywood Suite  | 0         | 0         | 0         | 1         | 2         | 3     | 6%  |
| Corus Entertainment  | 0         | 0         | 0         | 1         | 0         | 1     | 2%  |
| Radio-Canada   | 0         | 0         | 0         | 1         | 0         | 1     | 2%  |
| Super Channel  | 1         | 0         | 0         | 0         | 0         | 1     | 2%  |
| VIRCH  | 0         | 1         | 0         | 0         | 0         | 1     | 2%  |

Note: A project is counted more than once if there is more than one licensee.

## 2.7 Ownership Structures of Productions Funded

Applicant companies in the Aboriginal Program are required to be owned by Indigenous people, which means that Indigenous people must own 51% or more of the production company. In 2017-2018 and 2018-2019, 40% of projects funded in development met the minimum Indigenous ownership requirement for the production company, while 60% of projects exceeded it.

Figure 39: Number and Total Budgets of Development Projects Meeting or Exceeding the Minimum Indigenous Ownership Requirement, 2017-2018 and 2018-2019

| Development projects that met only the minimum 51% Indigenous ownership of applicant company |               |                    |
|--|---------------|--------------------|
|  | # of projects | Total budgets      |
| Exceeded the minimum   | 9             | \$856,324          |
| At the minimum   | 6             | \$1,051,755        |
| <b>Total</b>   | <b>15</b>     | <b>\$1,908,079</b> |

Note: derived from CMF application analysis

In the same two years, 77% of projects funded in production exceeded the minimum Indigenous ownership requirement for the production company, as compared to 23% of companies that met the minimum requirement only.

Figure 40: Number and Total Budgets of Production Projects Meeting or Exceeding the Minimum Indigenous Ownership Requirement, 2017-2018 and 2018-2019

| Production projects that met only the minimum 51% Indigenous ownership of applicant company |               |                     |
|---|---------------|---------------------|
|   | # of projects | Total budgets       |
| Exceeded the minimum  | 24            | \$27,984,856        |
| At the minimum  | 7             | \$9,232,069         |
| <b>Total</b>  | <b>31</b>     | <b>\$37,216,925</b> |

Note: Table derived from CMF application analysis

## 3. Summary Conclusions

The Aboriginal Program is supporting a growing and expanding sector as is evidenced by the findings of the statistical profile above:

- The Program presently provides \$8.5 million a year to Indigenous producers to make television and convergent digital media content primarily in the genres of documentary and children's content.
- The Program has provided a total of \$40.1 M in production and development financing to 73 television productions and 48 television development projects over the five years examined in this report.
- Seventy-four Indigenous production companies across the country benefited from production financing.
- More than 77% of all companies accessing producing funding from the Program exceeded the 51% ownership requirement in the last two years.

- More than half of the projects supported by the Program in the last two years exceed the language requirement, usually by achieving a language content of 50% or more.
- There are a small number of production companies that have been successful in accessing recurrent funding.

While the Program is achieving very positive results, it remains oversubscribed. This over subscription attests to the growth and vitality of the sector. Our review shows that there are gaps that require addressing, as evidenced by the following:

- The Program supported 70% of the total volume of production (i.e. total amount of production budgets) for which financing was sought through the Program. This means that over the five years, a total of about \$30 M in production triggered by broadcasters was not financed through the Program.
- Of the productions funded through the Program, financing from the CMF represented 42% of total budgets.
- Development funding is even more oversubscribed with the CMF closing the financing early in the fiscal year.
- Of the development projects funded through the Program, financing from the CMF represented 72% of total development budgets.
- Production budgets are low compared to English-language production budgets overall.
- The Program provided less than a million dollars in financing for drama series over five years. This represents 3% of all financing for the production of series.
- Seventy five percent of all productions supported by the Program were triggered by APTN. Other Indigenous broadcasters triggered a further 12% of production. (NITV, Adam Beach Film Institute and Bandwidth Digital Releasing) Mainstream broadcasters triggered 13% of projects supported by the Program.

In light of these findings, any changes to the design of the Program should take into consideration the increasing demand for financing, low levels of funding for development and production, very limited funding for drama series and the lack of opportunities for Indigenous producers to make content destined for audiences other than APTN.



## II. Key Interview Findings

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The interviews conducted have allowed us to identify the following key themes.

### *1. Strengthen the Objectives of the Program to Revitalize Indigenous Languages*

The Aboriginal Program plays an important role in providing Indigenous producers with funding for screen content. It is well appreciated and producers recognize the impact it has had on expanding their opportunities to develop and produce television, feature films and digital content.

At the same time, there is a need to clarify the spirit and intent of the Program. The Program is seen to be trying to achieve two very different things – 1) help preserve and revitalize Indigenous languages by supporting the creation of content in Indigenous languages and 2) support Indigenous production, primarily created in English and French languages. There is no doubt amongst interviewees that the goal of producing content in Indigenous languages is critically important. However, the requirement to meet a minimum level of Indigenous language content in all funded productions is not serving the needs of many Indigenous productions.

The requirement that at least 20% of a television component's onscreen dialogues and/or narration be originally shot in an Indigenous language poses a significant challenge to some projects, particularly in cases where the goal of the content is not to revitalize language, or where few speakers of an Indigenous language remain. In the former case, adding an Indigenous language can seem contrived, while in the latter, it can be difficult and costly to find actors or narrators, though these costs are typically not reflected in the project budget.

The requirement that projects be aired in an Aboriginal-language is said to be one factor contributing to the lack of licensing from broadcasters other than APTN. The latter is the only CRTC licensed broadcaster that must meet Indigenous language broadcasting requirements. Other broadcasters do have this requirement and are less motivated to air programs in Indigenous languages. The requirement to air programs in an Indigenous language is seen as a disincentive when seeking licenses from broadcasters other than APTN, with the result that producers feel "pigeonholed" to working only with APTN.

Producers are of the view that the Program as currently designed is vital to revitalize Indigenous languages. However, the Program is not meeting the needs of Indigenous producers who wish to create content that is not necessarily intended to preserve or revitalize Indigenous languages.

Indigenous producers want to grow their companies by accessing production opportunities that are available to other Canadian independent producers. However, these opportunities are currently not open to them for the structural reasons described above, in which the current language requirements of the Aboriginal Program play a key role.

In addition, design of the Aboriginal Program favours lower-budget production. All interviewees noted that the Aboriginal Program does not have sufficient resources to support the development and production of content by Indigenous producers. The Program is oversubscribed and the amount of funding provided by the Program is not on par with its English and French-language counterparts. The Program's funding caps and current licence fee thresholds, in particular as regards the production of scripted content, are too low, driving down production budgets. In the absence of interest from other broadcasters or distributors, it is very challenging to complete financing. In order to compete with other independent producers to attract the higher licence fees available from mainstream broadcasters, producers need to develop and produce projects with higher budgets. As was oft noted by interviewees, the systemic lack of opportunity to

participate in the broader Canadian broadcast system is a persistent reminder that Indigenous people continue to be subjected to the legacy of Canadian colonialism.

Interviews were inconclusive on the need to replace the term “Aboriginal” with “Indigenous” in the name of the Program. Some noted that terms have changed over the years but that the meaning of the Program is clear.

## *2. New Funding Opportunity is Needed to Support Indigenous Productions Destined for English- or French-language Markets*

The limited amount of funding that is currently available through the Aboriginal Program presents a major obstacle to the growth of production companies. Producers support the establishment of a new stream of funding to support Indigenous production (i.e. in English or French languages), with the aim of encouraging more Indigenous production, licensed by a wider array of Canadian broadcasters, and made available to Canadians on the platforms of their choice.

New resources are required to create a new funding stream aimed at supporting Indigenous productions intended for the broader English- or French-language (i.e. “mainstream”) broadcasting markets. The resources allocated to a new stream of funding should be robust.

Producers noted critical gaps in funding that should be addressed with new resources. For example, there is a critical need to support more development of scripted content to enable Indigenous producers to benefit from current opportunities.

Many producers identified the need for more development funding for drama programming. Projects require more resources in order to be more production ready. Current levels of development budgets and maximum contributions afforded through the Aboriginal Program are seen as both unfairly low and discriminatory when compared to funding available for non-Indigenous production in French and English.

Representatives of the CBC noted that as the national public broadcaster, they could be allocating greater resources to support the development of long-form scripted Indigenous content. Being proactive in this way would help Indigenous producers take more risks in development and develop talent.

In addition to a new stream of funding, incentives are needed that would encourage mainstream broadcasters to support the development and production of Indigenous stories, similar to production incentives that support regional productions. To encourage all broadcasters to trigger projects made by Indigenous producers, it was suggested that an incentive be created, which could be in the form of a bonus to broadcasters or licence-fee top up on productions licenced for the English- or French-language market.

## *3. Help Build Capacity of Production Companies*

There is need for production funding that builds the capacity of Indigenous production companies and the sector as whole.

Indigenous producers identified the need for CMF funding to help build the capacity of their production companies. Most Indigenous production companies move from project to project without being able to accumulate enough capital to build capacity.

It was suggested that Indigenous producers be allowed to retain higher producer fees and corporate overhead in their production budgets. Given the generally low production budgets for Indigenous projects, being able to retain a higher proportion of their producer fees and corporate overhead would increase the capacity of Indigenous production companies to invest in development, in corporate infrastructure and to cash flow productions.

While tax credit programs are a significant source of production funding, the turn around time to receiving them is so long that it threatens the viability of Indigenous production companies. This is because many Indigenous producers do not have access to credit or bridge financing and must cash flow their productions out of existing resources while they wait for their tax credits. This puts an enormous financial burden on producers.

Some producers suggested the CMF should not be recouping from projects where the primary focus is cultural and/or language revitalization, such as children's programming, as this content has limited sales potential.

Support is also needed for developing advanced producer skills that will allow Indigenous producers to take their projects to higher production budgets and their companies to a higher level of growth and competitiveness. Suggestions for doing so included encouraging Indigenous producers to work with more experienced Indigenous production companies and encouraging greater knowledge of financing that would help companies develop and produce series, which provide production companies with more reliable revenues.

#### *4. Maintain Majority Indigenous Ownership Requirement*

The issue of ownership is critical to Indigenous cultural sovereignty and a top priority for Indigenous producers. To be eligible for funding from the Aboriginal Program, Indigenous people must own a minimum of 51% of the applicant production company and of copyright in the project. This rule provides Indigenous producers with the flexibility to work in partnership with non-Indigenous owned companies, while safeguarding their ownership and control over their intellectual property (IP).

Some point out that over the years, they have observed partnership arrangements that may not provide meaningful ownership to Indigenous producers, such as in cases where rights are reverted to the non-Indigenous producer (particularly in a short time frame), or where a third party owns a minor share of the ownership, reducing the Indigenous producer's control over a project.

Most producers interviewed want to safeguard the flexibility that the current ownership requirements provide so as to enter into partnerships if so required by a production. These partnerships are recognized as having helped to build capacity in the sector.

Some producers favor a higher ownership requirement in order to encourage greater collaboration between Indigenous producers.

It was suggested that in some cases, the 51% ownership rule may be favouring non-Indigenous producers.

Some producers noted that they maintain ownership and control by contracting out their business affairs rather than sharing their IP with other producers. It was suggested that more of this is needed so that the sector can truly build capacity.

### *5. More Communication with Indigenous Producers on the Assessment of Projects*

Producers would like to have more information about how their projects are being evaluated.

Some commented that they would like to see more consultation on the criteria used in the assessment of projects, such as points awarded for Indigenous languages, crew and key creative.

Producers agree on the importance of training and employing Indigenous personnel. However, in the current context of low levels of production activity overall in the Indigenous sector, it is difficult to maintain Indigenous crews and talent. In the absence of available talent, producers want to have the flexibility to work with non-Indigenous people without being penalized for it.

Jury members should be Indigenous and have relevant television production experience. It was noted that some jurors may be Indigenous but lack experience in production and financing, have insufficient knowledge of the tax credit system and lack overall expertise in producing a television series.

Some producers proposed that an Indigenous unit be created with staff that have experience in Indigenous productions, business affairs and television production financing. The CMF must ensure that its staff members are culturally aware and sensitive to the different production contexts in which Indigenous producers work. For example, better knowledge of regional differences.

Producers would like to see Indigenous production protocols integrated into the Program. The assessment of projects should recognize and be guided by the production protocols recently published by imagineNATIVE and the ISO and where appropriate, these should be factored into the evaluation of projects.

### *6. Recognize Indigenous Broadcasting Rights in the Broadcasting Act*

Many producers commented on the need for the federal government to enshrine in the *Broadcasting Act* the importance of Indigenous sovereignty within the Canadian broadcasting system including a robust defense of the rights of Indigenous people to their own media and the right and means to tell their own stories. Suggestions included 1) the development of an “Indigenous Broadcasting Act” stating that government agencies and cultural arms of government need to engage in a process of “decolonization”; and 2) include explicit recognition of the rights of Indigenous Peoples in Canada in Canada's broadcasting policy objectives. These are enshrined in Article 16 of the UN Declaration, which provides that “Indigenous peoples have the right to establish their own media in their own languages and to have access to all forms of non-indigenous media without discrimination.”

### III. Conclusions and Recommendations

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#### 1. Overview of Findings and Recommendations

Our review finds that the Aboriginal Program, which provides support for Indigenous content in Indigenous languages, is a priority for the sector as the only dedicated program for Indigenous production. However, the Program as presently designed is attempting to meet two very different objectives – to preserve and revitalize Indigenous languages and to provide funding to Indigenous producers to make content for television and digital platforms. While on one hand, the Program supports content which is essentially cultural and language based, on the other hand, it assesses projects based on market interest and industrial criteria.

Changes proposed in this report point to an overall redesign of support for the development, production and distribution of Indigenous content, of which the Aboriginal Program is one component. Any changes made to the Aboriginal Program must be seen within this larger context.

This study identifies the need to make changes to the Aboriginal Program that will strengthen its support for the revitalization of Indigenous languages. At the same time, a new stream of funding is required for Indigenous productions not tied to linguistic objectives. A second stream of funding will address the systematic barrier faced by Indigenous producers who are not able to access mainstream broadcasters for the many reasons cited in this report and which have been reported by other studies published in the last few years.<sup>2</sup> By creating a new stream of funding aimed at mainstream audiences, the Aboriginal Program could focus exclusively on Indigenous language production.

#### **Recommendation 1: Strengthen the Aboriginal Program as a Cultural and Language Revitalization Fund**

There is a need to clarify and focus the objectives and guidelines of the Aboriginal Program on Indigenous cultural production and revitalization of Indigenous languages. This will require appropriate changes to the wording of the program's spirit and intent, linguistic requirements and the evaluation criteria applied to projects.

The Guidelines for the Program presently state that, “[T]he Aboriginal Program which forms part of the CMF's Convergent Stream supports the growth of Aboriginal production. The CMF recognizes the unique circumstances of the Aboriginal production community.” This language is not sufficient to capture the language goal of the Program. New language could be introduced that captures the importance of creating content that is cultural and intended to revitalize Indigenous languages.

The current requirement that 20% of the production should be shot or voiced-over in an Indigenous language should be maintained. Where productions achieve a higher percentage, bonus points could be provided in the project's evaluation.

The Program should continue to require a minimum of 51% Indigenous ownership in funded production companies and projects. However, additional safeguards should be put in place to

<sup>2</sup> Maria De Rosa and Marilyn Burgess, *The Aboriginal-Screen-Based Production Sector in Review: Trends, Success Stories and the Way Forward*, prepared for APTN and its funding partners, 2013; Marcia Nickerson, *Supporting and Developing the Indigenous Screen-based Media Industry in Canada: A Strategy*, prepared for the Canada Media Fund, 2016; Maria De Rosa and Marilyn Burgess, *Pathways to the International Market for Indigenous Screen Content: Success Stories, Lessons Learned from Selected Jurisdictions: A Strategy for Growth*, prepared for the ImagineNATIVE Institute, 2019.

ensure that Indigenous people meaningfully own and control their companies and projects, for example, by requiring a minimum ten percent ownership stake from any owner in the company or the project.

Consideration should be given by the CMF to making changes to its recoupment policy to recognize the special nature of programming supported by this Fund. All funding provided through this Program should be non-recoupable.

Appropriate changes to the assessment criteria should be brought that remove market considerations. These should be replaced with considerations on the cultural and language revitalization aspects of projects, as well as their potential reach in relevant markets.

Consultation with Indigenous stakeholders will be needed to gain a better understanding of how the evaluation grid should be modified.

### **Recommendation 2: Create a New Funding Stream to Support the Development and Production of Indigenous Content for Screen-Based Markets**

Our review finds that there continues to be a gap in funding for Indigenous productions aimed at more general markets, such as mainstream television and other screens. There is a need to create a new funding stream for Indigenous producers who wish to exploit opportunities in the wider screen-based market by producing content for a broad audience. A number of studies in recent years support this recommendation.<sup>3</sup>

A 2016 study found that one of the barriers to the growth of the sector was inadequate funding. The study noted that Indigenous content creators are under-resourced and that consideration should be given to the creation of an Indigenous Screen Fund.<sup>4</sup>

More recently, the study, *Pathways to the International Market for Indigenous Screen Content: Success Stories, Lessons Learned From Selected Jurisdictions and a Strategy For Growth* identified the need to create a Indigenous Screen Development Fund and a Production Fund to support Indigenous producers create content in a diversity of formats, genres and budget levels for an international audience.<sup>5</sup>

A 2013 study found that, “established producers...are concerned about the long-term sustainability of their businesses since their lack of access to broadcasters other than APTN represents a key barrier in their growth. Other challenges cited by television producers include lack of sufficient financing to produce higher-budget productions.”<sup>6</sup>

A New Indigenous Screen Fund should have the resources to support screen-based content for the production of both pilots and dramatic series, feature films and interactive content.

The design of such a Fund should involve further consultations with the Indigenous production sector but could be guided by the following considerations:

- Indigenous people represent 5% of the Canadian population, which is not reflected in current funding levels.

<sup>3</sup> IBID.

<sup>4</sup> Marcia Nickerson, Op. Cit.

<sup>5</sup> Maria De Rosa and Marilyn Burgess, 2019, Op. Cit.

<sup>6</sup> Maria De Rosa and Marilyn Burgess, 2013, Op. Cit.



- To be competitive drama projects require significantly higher budgets that are currently possible to finance through the Aboriginal Program.
- In addition to a new stream of funding, projects triggered by broadcasters could benefit from an incentive. This is not unlike the CRTC's establishment of the Indigenous Incentive whereby broadcasters that support Indigenous productions receive a bonus that contributes to the broadcaster's Canadian Programming Expenditure requirements.

### **Recommendation 3: Create a Development Fund to Support Scripted Content in Collaboration with Broadcasters**

It is recommended that a targeted Indigenous Screen Content Development Fund be created with sufficient resources to encourage production with an array of strong, camera-ready scripts and interactive prototypes.

This report finds that available resources for the development of Indigenous content are insufficient. The Aboriginal Program dedicates about 7.5% of all total funding to development. The program is so oversubscribed that development financing is closed early in the fiscal year.

Development includes the evolution of a project from idea to screen and, ultimately, to Canadian and international markets. It is at the development stage that a good film, television drama or digital property is shaped. As the "R&D" moment in screen-based production, development is a costly, high-risk undertaking: only the best scripts will go forward, and even these cannot be consumer-tested in advance.

Indigenous producers have small companies for the most part, with limited capacity to invest in development. Funding should be in the form of grants and cover all phases of development. A development fund should provide support to Indigenous producers to option the rights to Indigenous content.

The priority of the Fund should be to support the development of drama series, feature films and interactive content. These are the most expensive to produce and yet lead to the creation of screen content that can resonate with audiences internationally. This is a significant avenue for potential growth that has been severely under-exploited by Indigenous producers, with little access to funding through the Aboriginal Program or any other fund. A key priority of this Fund should be to support the development of television drama pilots that have the best changes of being financed as series.

A number of studies in the past have recommended that broadcasters support a Development Fund. In a 2013 study, it was noted that: "To promote and encourage the distribution of Aboriginal programming to a wider range of broadcasting services in Canada, the CMF could consider the introduction of incentives to encourage broadcasters other than APTN to trigger projects by Aboriginal producers."<sup>7</sup>

With this in mind, it is recommended that the CMF and the ISO establish a Development Fund to support scripted content in collaboration with broadcasters. The Fund would have a budget of \$3 million per year or more. This would allow for meaningful support of three streams of Indigenous development: \$1 million per year, respectively, for the development of feature films in all genres, high-budget drama series and pilots, and digital media, including interactive applications and websites, video games and web series.

<sup>7</sup> IBID.

The experience of Australia and New Zealand has shown that well-funded development allows projects to move smoothly and in a timely manner from idea to treatment to draft and polish. A lesson learned from the jurisdictions of Australia and New Zealand is that targeted investment in talented filmmakers to hone their projects in development is a necessary element in all success. The Sundance Institute too links the success of Indigenous filmmakers to the investments made at the development stage.

**Recommendation 4: Provide Support for Advanced Producing Skills in Indigenous Production Companies**

Our study finds that production capacity of the Indigenous screen-based sector is growing and could benefit from access to a program to support the development of producers' business skills.

Producers should be provided with opportunities to acquire or hone the full range of producing skills necessary to increase their capacity for producing more demanding projects. A study conducted in 2016 found that emerging producers could benefit from the acquisition of the full range of producer skills and exposure to festivals and markets and other capacity building experiences.<sup>8</sup>

Some interviewees proposed that the Indigenous Screen Office take the lead in helping to establish a program aimed at increasing executive producing skills. It was pointed out that this initiative could be undertaken in collaboration with the Banff Centre, the Canadian Film Centre, and the National Screen Institute, to provide opportunities across the country.

<sup>8</sup> Marcia Nickerson, Op. Cit., page 30.



## Annex 1: Interviewees and Interview Guide

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### *List of People Interviewed*

1. Jeff Bear, Urban Rez Productions
2. Shane Belcourt, The Breath Films
3. Jason Brennan, Nish Media
4. Catherine Bainbridge, Rezolution Pictures
5. Rod Butler, Canada Media Fund
6. Sally Catto, CBC
7. Charles Clement, Manito Media Inc
8. Norm Cohn, Kunuk Cohn Productions
9. George Hargrove, Mushkeg Media/Achimist Film
10. Monika Ille, APTN
11. Nyla Innuksuk
12. Lisa Jackson, CBC
13. Jules Koostachin, VisJuelles Productions Inc
14. Luc Laine, Productions Cayenne Inc
15. Laura Milliken, Big Soul Productions
16. Jordan Molaro, Nu-Media Films
17. Jennifer Podemsky, RedCloud Studios
18. Paul Rickert, Mushkeg Media/Achimist Film
19. Jill Samson, Canada Media Fund
20. Peter Strutt, Strutt Roar Media
21. Kerry Swanson, Indigenous Screen Office
22. Loretta Todd, Nehiyawetan Productions Inc.
23. Jesse Wenté, Indigenous Screen Office
24. Ernest Webb, Rezolution Pictures
25. Jeremie Wookey, Wookey Films Inc.

### *Interview Guide*

## **A. Introduction**

Thank you for agreeing to participate in an interview on the subject of the Aboriginal Program (“the Program”) of the Canada Media Fund. The Indigenous Screen Office (ISO) is undertaking a review of the Program with the goal of ensuring that it meets the needs of the Indigenous screen-based production sector (i.e., production companies owned and controlled by Indigenous people). The findings of this study will support the ISO’s consultations on the next iteration of Program guidelines (2019-2020) and longer-term future direction of the Program.

Communications MDR, represented by Maria De Rosa and Marilyn Burgess, has been retained to undertake the review. Our review of the Aboriginal Program will cover a five-year period from 2014-2015 to 2018-2019 inclusively. This five-year period will provide a good understanding of trends with respect to funding activity in the Program. The goal of the interviews is to gather the perspectives of stakeholders on the alignment of the program with the needs of the sector and potential future directions.

## **B. Interview Questions**

### Design of the Program

How is the program meeting the needs of the Indigenous screen-based production sector? Is the program addressing the challenges facing the sector? The opportunities?

How well does the ownership requirement (51% Indigenous-owned productions) reflect the needs of Indigenous production companies?

What if any, are the barriers faced by Indigenous-owned production companies in accessing funding through the Program?

How well are the language requirements of the Program addressing the needs of the Indigenous production sector?

### Future Changes to Program

What short-term and long-term changes should be brought to the Program?

Are there changes that should be brought to the terminology used in the Program, including the program name?

What, if any, changes should be brought to the evaluation of projects submitted to the Program?

### Broader Policy Considerations

In light of the federal government’s current review of the Broadcasting Act, are there any policy changes that should be made to support the Indigenous screen-based sector?