

2023-24 DEMOGRAPHIC REPORT

SUMMARY VERSION
DECEMBER 10, 2024



CANADA
MEDIA FUND

FONDS DES MÉDIAS
DU CANADA



Face à la danse

LAND ACKNOWLEDGEMENT

The Canada Media Fund would like to acknowledge that this report touches upon the lived experiences, identities, and belonging of many creators and communities who live from coast to coast to coast in the territory that is today known as Canada. These lands and waters are the unceded and treaty territories of First Nations, Inuit, and Métis peoples. Throughout this work we have strived to recognize and address the voices of Indigenous peoples as distinct and sovereign.

Many of those who live in this territory today have come as settlers, immigrants, and newcomers in this generation and generations past. The Canada Media Fund acknowledges those who came here forcibly, particularly because of the transatlantic slave trade.

Finally, we acknowledge that we are located on land that has been the site of human creativity and storytelling for thousands of years. We are mindful of broken covenants, and we strive to make this right with the land and with each other.



Coming Home



CONTEXT

This report intends to provide a comprehensive overview into demographic representation across the Canada Media Fund (CMF) programs during the 2023-2024 period. This initiative is part of the CMF's Analytics and Strategic Insights (ASI) mandate on data equity, which analyzes demographic data to produce data-driven insights that support the CMF's Equity, Diversity, Inclusion, and Accessibility (EDIA) objectives.

The demographic information used in this report has been collected through [PERSONA-ID](#), the CMF's voluntary self-identification system launched in early 2022.

While we now have two consecutive years' worth of data through the PERSONA-ID system, it is too early to identify definitive trends. Therefore, this *Demographic Report* should be read with the lens of how consistent annual data could be reported on in the future. Alongside this singular year-over-year data, the report incorporates results from a [PERSONA-ID user survey](#) conducted in February 2024 and feedback gathered from consultations with industry guilds, associations, and community organizations during the spring and summer of 2024.

Given that the media industry does not yet have established benchmarks for demographic analysis, we are employing multiple approaches to present the data. These include comparisons with the [first Demographic Report](#), a review of representation among all registered PERSONA-ID users (PERSONA-ID registry), and, where applicable, broader Canadian demographic data ([Census 2021](#)).



It is important to note that this summary report is not exhaustive. Rather, it highlights key findings selected by ASI's data equity team that reflect areas of priority, interest, or concern for both the CMF and the industry at large. For a complete overview of demographic representation across the CMF's programs, please consult the full Demographic Report found in the Insights section of the CMF website, which presents extensive charts and further descriptive analysis for all PERSONA-ID categories.



GLOSSARY

The following are essential definitions for terms used in this report:

Key Roles: Also known as Key Personnel roles, creative and production team, or Eligible Positions. In Linear content, this refers to all paid positions for Writer, Director, and Producer roles (including Producer, Executive Producer/Showrunner, Executive Producer, Co-executive Producer, Supervising Producer, Associate Producer, or Creative Producer positions). In Interactive Digital Media (IDM), this refers to all paid positions for Producer, Executive Producer, Director (including Technical Director, Creative Director, Art Director, and Interactive Director), Senior Programmer, Designer, and Project Manager

Ownership: Refers to distribution of the shares among individual shareholders or corporations.

Shareholder: For this report, the term shareholder defines an individual—with or without a PERSONA-ID number—who owns shares in a company applying to or funded by the CMF. It excludes companies or corporations that may own shares as well.

Diverse Communities: An umbrella term used by the CMF that in 2023-2024 refers to individuals who are Indigenous (First Nations, Inuit, and Métis), Black or members of Racialized Communities, 2SLGBTQ+, Disabled Persons or Persons with Disabilities.

Equity-Seeking (now Equity-Deserving) Communities:

A term used by the CMF that in 2023-2024 refers to individuals who identify as: women, members of a Black or Racialized Community, 2SLGBTQ+, Disabled Persons or Persons with Disabilities, regional communities, and members of Official Language Minority Communities. As of September 2024, the CMF uses the term “Equity-Deserving Communities” rather than “Equity-Seeking Communities.”

(Black and) Racialized Communities: This term refers to Black people or Afro-descendants and members of other non-white communities, often designated as People of Colour in the North American context. In 2023-2024, the CMF recognizes the following communities in Canada as Racialized Communities: Black people and people of colour or non-white communities, including Latin Americans, Middle Eastern people or West Asians, North Africans, South Asians, Southeast Asians, East Asians, Indigenous people from outside Canada, and biracial or multiracial individuals.

NOTE: Since April 2024, the CMF has used the term “Black and Racialized Communities” instead of “Racialized Communities.” For this report, the term Racialized Communities is used when referring to how individuals were identified in PERSONA-ID in 2023-2024, but “Black and Racialized Communities” is used for analysis.

For other CMF definitions not included above, see [Appendix A](#).



KEY TAKEAWAYS

1. Increased participation in PERSONA-ID	6
2. Higher representation of women	9
3. Growing representation of Diverse Communities	11
4. More representation of Indigenous Peoples	14
5. Representation of Black and Racialized Communities	17
6. Demographics in selective versus automatic programs	20
7. A first glance at Narrative Positioning	23
Looking Forward	27
Scope And Methodology	28
Acknowledgement	29



Birth of a Family



1. INCREASED PARTICIPATION IN PERSONA-ID



Dreams in Vantablack



INCREASED PARTICIPATION IN PERSONA-ID

There was a notable increase in participation in declared PERSONA-ID numbers across all funded applications and nearly all CMF streams, programs, and stages. **In 2023-24, 89 per cent of all declared Key Roles included a PERSONA-ID number**, compared to 83 per cent in 2022-23. Even more significant was the **jump in shareholder participation**, which rose from 67 per cent in the previous year to 85 per cent in 2023-24.

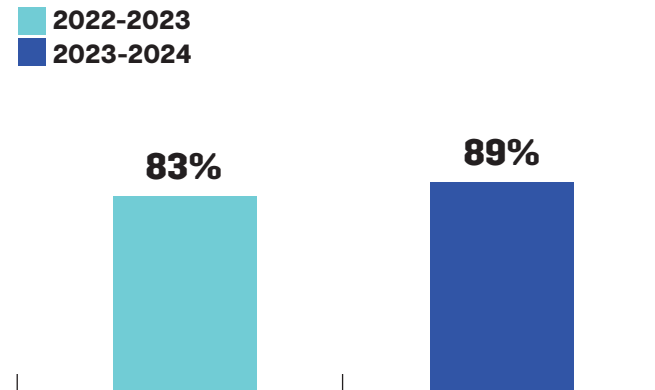
This increase is mainly attributed to three factors:

1. Analysts at CMF Program Administration (CMFPA), run by Telefilm, actively requested PERSONA-ID declarations from shareholders, making it necessary without being mandatory.
2. PERSONA-ID personal identification numbers have become more widely adopted, with minimal effort required by users and applicants once registered.
3. As suggested from the findings of the PERSONA-ID survey, most users find the system easy to navigate, believe it fulfills its purpose, and trust the CMF's security measures.¹

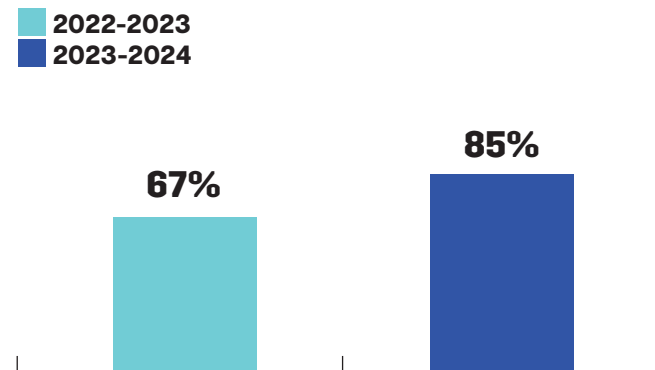
With higher participation, especially among shareholders, the data on Ownership is now more comprehensive, providing a clearer picture of who owns the intellectual property funded by the CMF. For example, in 2023-24, **women accounted for 28 per cent of declared shares in funded linear content**, up from 19 per cent in 2022-23. Men declared 47 per cent of Ownership, compared to 28 per cent the previous year. However, the increase in participation rates makes it challenging to directly compare this year's data to last year's results.

¹ See [2024 PERSONA-ID UX Research Report](#) for detailed results.

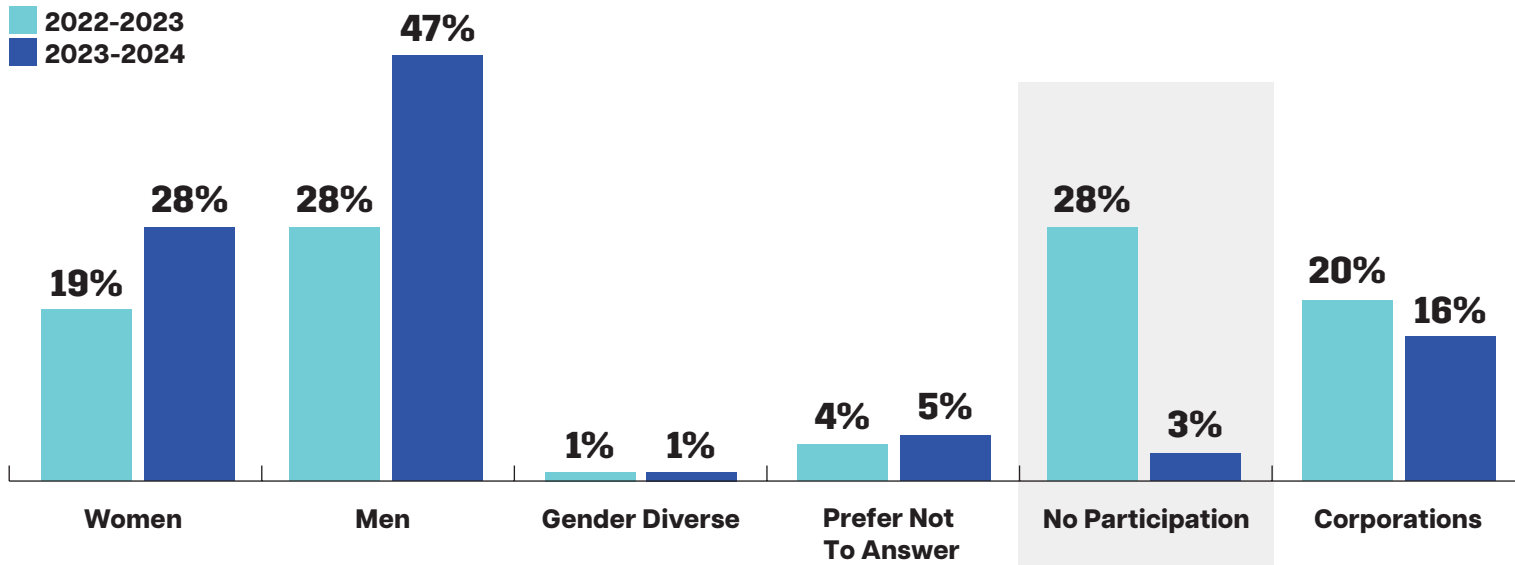
KEY ROLES PARTICIPATION IN PERSONA-ID



SHAREHOLDERS PARTICIPATION IN PERSONA-ID



GENDER REPRESENTATION IN OWNERSHIP FOR LINEAR FUNDED APPLICATIONS



The increased participation also sheds light on the identities of those who had previously chosen not to participate. It was found that a large percentage of them identified with majority groups (e.g., non-Indigenous, white or of European descent, straight or heterosexual, and/or non-disabled or able-bodied).

OBSERVATIONS:

- **PERSONA-ID participation:** Promoting the inclusion of PERSONA-ID numbers for Key Roles, shareholders, and other team members at the application stage can increase participation in PERSONA-ID. Using CMFPA analyst-client interactions, the CMF website, and communications has helped reassure users and applicants about the system's purpose.

- **Demographic data:** Providing timely and relevant statistical insights and analysis to PERSONA-ID users can increase transparency with regards to their data and contributions.
- **PERSONA-ID reach:** Based on suggestions from guilds, associations, and community organizations, expanding PERSONA-ID's scope in the future could include other critical roles like on-screen representation.

2. HIGHER REPRESENTATION OF WOMEN



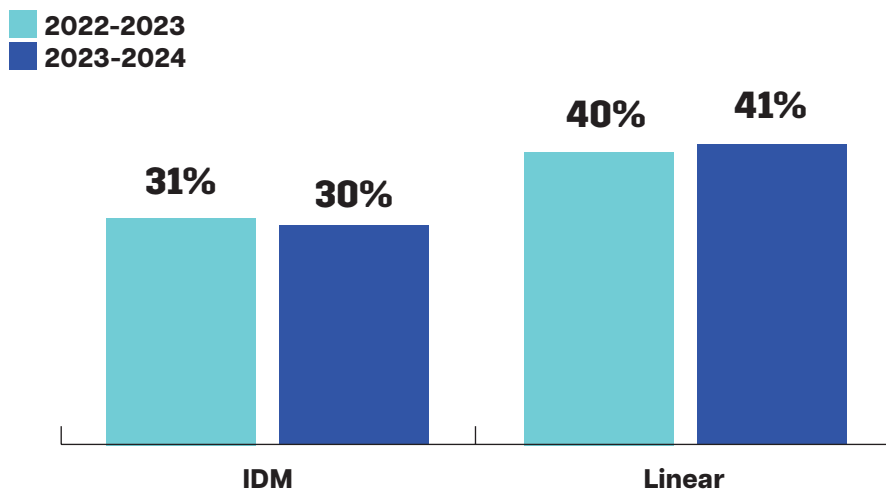
Identity of Wellness



HIGHER REPRESENTATION OF WOMEN

There was minimal change in the representation of women in Key Roles, increasing slightly from 40 per cent to 41 per cent in linear content in 2023-24, while remaining stable at 31 per cent in interactive digital media (IDM). Although Ownership levels for women increased overall in both streams (rising from 14 per cent to 19 per cent in IDM), this is largely attributable to the increase in overall participation.

WOMEN REPRESENTATION IN KEY ROLES FOR FUNDED APPLICATIONS



The representation of women in linear selective programs remains relatively high, with women occupying 46 per cent of all Key Roles. In linear automatic programs, the proportion of funded applications

with 40 per cent or more women in Key Roles decreased from 56 per cent to 54 per cent.

Overall, women represent 41 per cent of PERSONA-ID's registry (stable from last year) but this is still below the levels represented in the general population.

Finally, individuals who identify as gender diverse in linear content increased from one per cent to two per cent in 2023-24, while in IDM their presence increased from four per cent to five per cent, slightly above their four per cent representation in PERSONA-ID's registry.

OBSERVATIONS:

- **Minimum representation:** Women in Key Roles hovers above 40 per cent across all relevant CMF incentives and programs but continues to fall below levels represented in the general population.
- **Tracking and evaluation of Gender Balance Factor ²:** The CMF will closely monitor the impact of the new Gender Balance Factor, introduced in 2024-25 and applicable in 2025-26, based on both Key Personnel positions and Ownership shares held by women.
- **Gender representation:** As the representation of gender-diverse individuals continues to grow, there is an opportunity to expand the CMF's measurement and tracking to include them in the reporting on Equity-Deserving Communities.

² For more information on the new Broadcaster Gender Balance Factor, see F.2.2 and F.2.3 in the [Broadcast Envelope Manual](#)

3.

GROWING REPRESENTATION OF DIVERSE COMMUNITIES



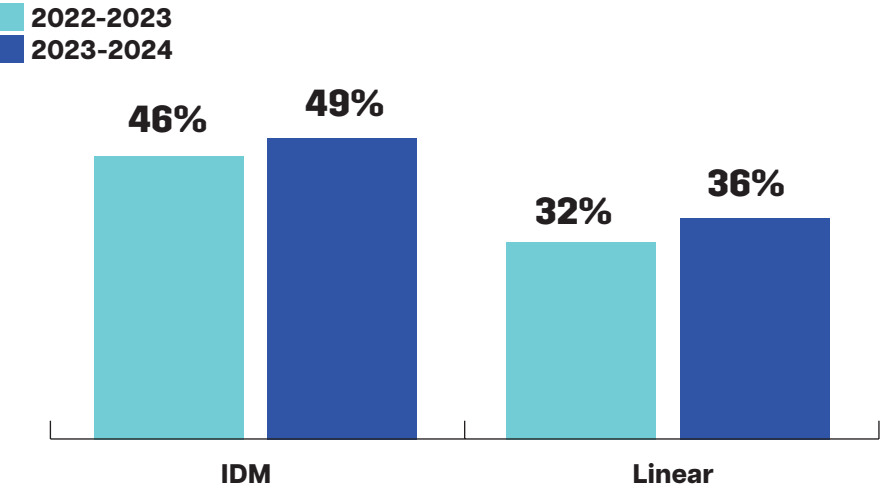
Adieu Daech?



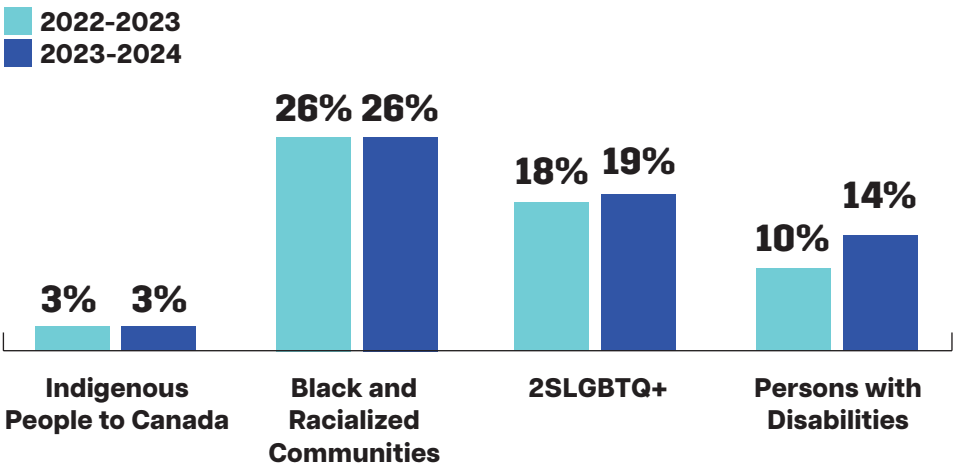
GROWING REPRESENTATION OF DIVERSE COMMUNITIES

Individuals in Key Roles who identify with one or more **Diverse Communities increased year-over-year across nearly all CMF streams and programs.** This growth was largely driven by an increase in the representation of Disabled Persons or Persons with Disabilities and 2SLGBTQ+ individuals. Across all linear content, Diverse Community representation in Key Roles rose from 32 per cent in 2022-23 to 36 per cent in 2023-24. Specifically, persons who declared living with disabilities grew from four per cent to six per cent, and 2SLGBTQ+ representation increased from eight per cent to 11 per cent. In IDM programs, the representation of Disabled Persons or Persons with Disabilities increased from 10 per cent to 14 per cent, and 2SLGBTQ+ representation grew from 18 per cent to 19 per cent, both above current PERSONA-ID registry levels (all registered users).

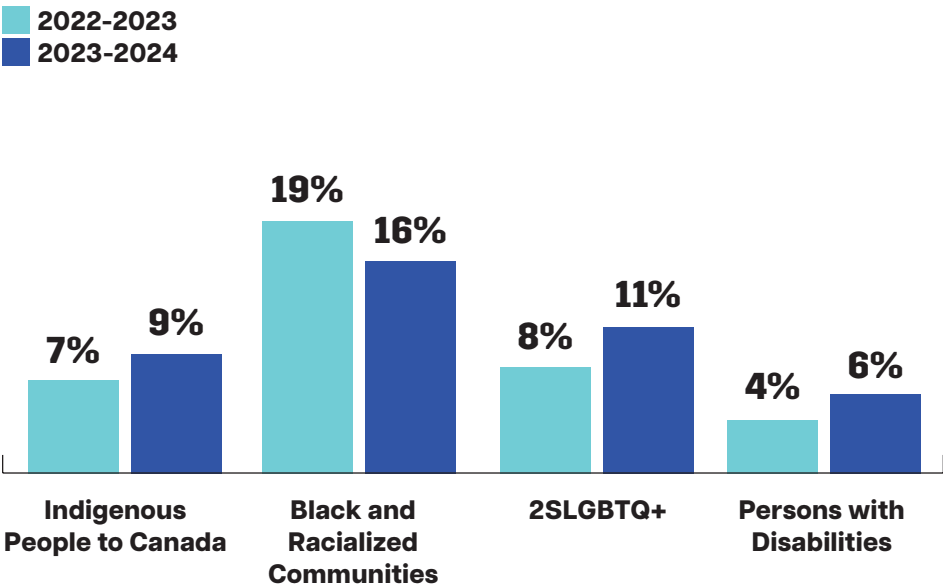
DIVERSITY REPRESENTATION IN KEY ROLES FOR FUNDED APPLICATIONS



REPRESENTATION OF DIVERSE COMMUNITIES IN KEY ROLES FOR IDM FUNDED APPLICATIONS



REPRESENTATION OF DIVERSE COMMUNITIES IN KEY ROLES
FOR LINEAR FUNDED APPLICATIONS



For the **disabled community**, consultations with the Disability Screen Office (DSO) suggest that this growth may be linked to current participants now feeling more comfortable self-identifying, rather than just an increase in new participants who identify as disabled. The impact of CMF-supported DSO initiatives, CMF’s Accessibility Support, and industry-wide programs likely contributed as well. Additionally, certain work conditions in IDM programs could offer adapted accommodations suited for some individuals with disabilities (e.g., remote work, controlled work environments).

The **increase in 2SLGBTQ+ representation** can be attributed to higher participation rates, particularly among those who identify as Bisexual or Pansexual. Among this demographic group, the identity saw growth from 28 per cent to 31 per cent in linear content, and from 38 per cent to 45 per cent in IDM. This high representation in IDM may be explained in part by their lower average age, which is 40 compared to 48 in linear content, as demographically, younger generations tend to have higher rates of 2SLGBTQ+ identification.³

Representation of Indigenous Peoples and Black and Racialized Communities, both included in the definition of Diverse Communities are covered in separate takeaways.

OBSERVATIONS:

- **Enhance accessibility:** The CMF will continue monitoring our programs to measure trends in representation of Disabled Persons or Persons with Disabilities. While efforts from the DSO, the CMF, and industry members have yielded positive results in increasing accessibility, there is still room for growth in all Key Roles and Ownership.
- **Manner of representation:** As the CMF continues to track the representation in Key Roles and Ownership of Diverse Communities and other social identities, it may be helpful to also analyze the results in authentic representation on-screen, in storytelling, and narrative positioning.

³ For more information on youth identification in 2SLGBTQ+ communities, see [IPSOS’ 2023 Pride Survey](#)

4. MORE REPRESENTATION OF INDIGENOUS PEOPLES



Sweet Summer Pow Wow



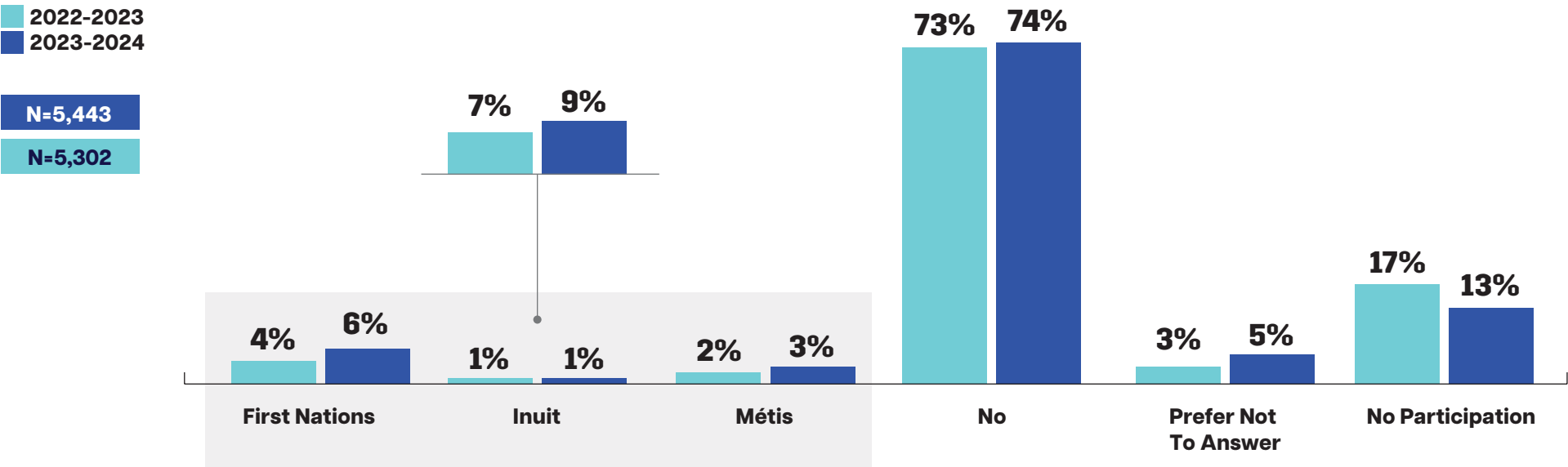
MORE REPRESENTATION OF INDIGENOUS PEOPLES

The overall representation of First Nations, Inuit, and Métis peoples in Key Roles within linear content increased from seven per cent to nine per cent in 2023-24. This growth was especially notable in Indigenous-language productions, where Indigenous representation rose from 57 per cent to 68 per cent. Among these groups, First Nations and Métis representation saw significant growth, particularly in English-language projects. However, Inuit representation remains at one per cent overall and declined in Indigenous-language productions from 26 per cent to 19 per cent. Similar to other Diverse Communities, Indigenous representation is higher in selective programs (which includes the Indigenous Program) than in automatic programs.

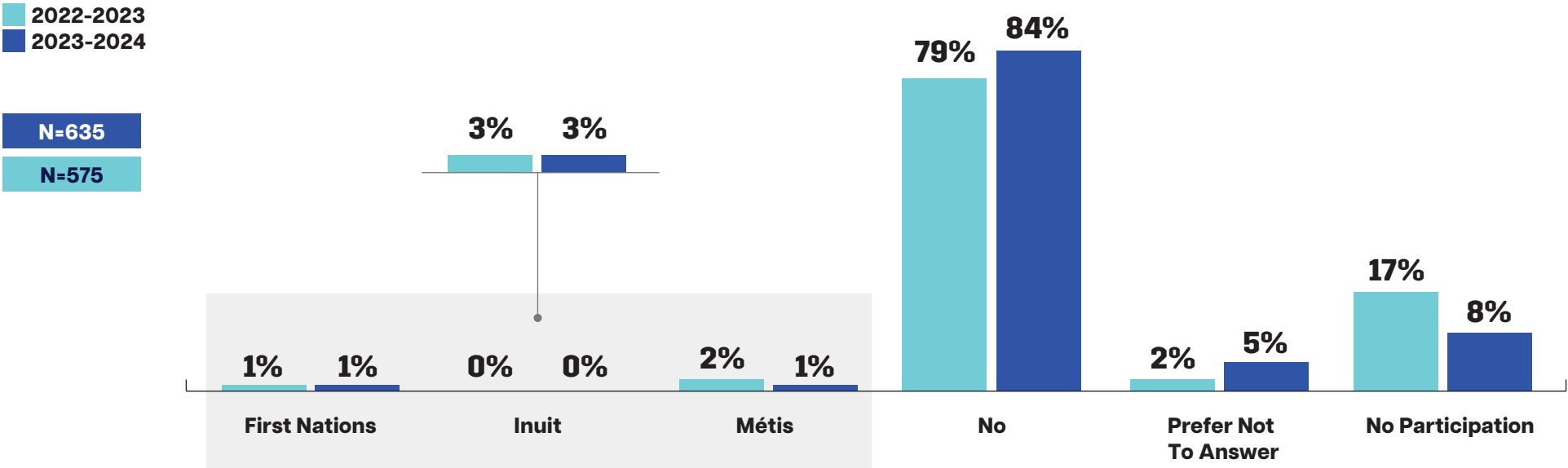
The increased participation of shareholders in PERSONA-ID in 2023-24 has also provided a clearer picture of Ownership by Indigenous Peoples, who represent 10 per cent of all shares in linear content—61 per cent in Indigenous Language projects, 12 per cent in English, and five per cent in French.

Director and Screenwriter remain the most common Key Roles held by Indigenous talent in linear content, both at 13 per cent in English projects and 73 per cent in Indigenous Language projects. Documentaries continue to show the highest Indigenous representation in Key Roles, with 15 per cent overall and 19 per cent in English-language projects.

INDIGENOUS PEOPLE TO CANADA REPRESENTATION IN KEY ROLES FOR LINEAR FUNDED APPLICATIONS — 2023-2024 VS 2022-2023



INDIGENOUS PEOPLE TO CANADA REPRESENTATION IN KEY ROLES FOR
IDM FUNDED APPLICATIONS — 2023-2024 VS 2022-2023



In IDM, Indigenous representation is much lower than in linear content. Overall representation remains stable at three per cent, and Ownership shares are at two per cent, even with increased participation in PERSONA-ID. Notably, Inuit representation in IDM was at or near zero per cent for both Key Roles and Ownership across both years measured. The most common Key Role for Indigenous creators in IDM was Designer at four per cent. Currently, Indigenous peoples represent five per cent of all users in the PERSONA-ID registry.

OBSERVATIONS:

- **Indigenous representation in linear content:** Indigenous Peoples are nearing the 10 per cent threshold in Key Roles and have reached 10 per cent in Ownership shares in 2023-24.
- **Monitor new IDM program:** Given the relatively low representation in IDM, it will be important to closely monitor the outcomes of the new CMF and Indigenous Screen Office (ISO) Interactive and Immersive Program.

5.

REPRESENTATION OF BLACK AND RACIALIZED COMMUNITIES



BLK: An Origin Story



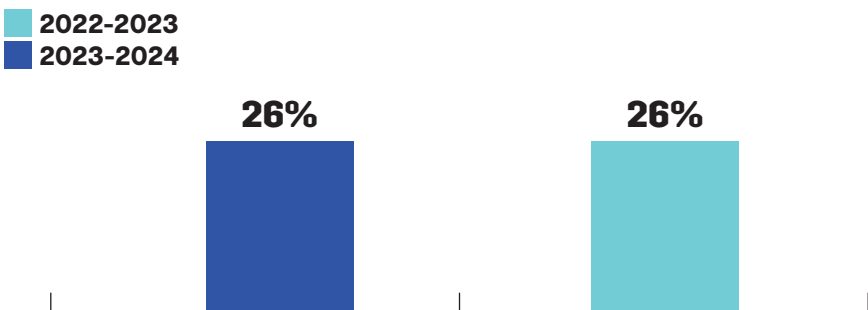
REPRESENTATION OF BLACK AND RACIALIZED COMMUNITIES

With only two years of data gathered, caution should be exercised in reading the following data points as these findings may be explained by temporary fluctuations rather than an observation of a longer-term trend.

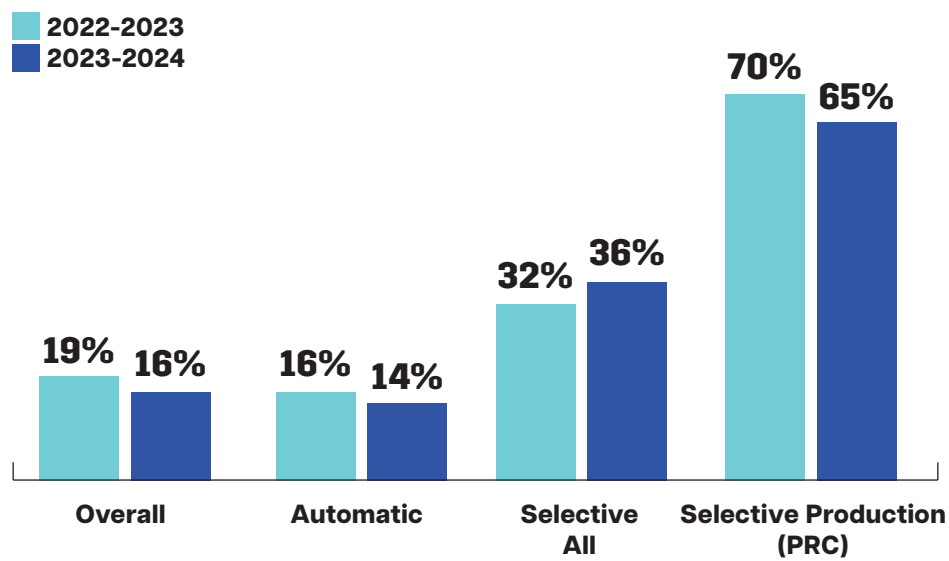
The proportion of Key Roles held by Black and Racialized Communities in CMF linear programs dropped marginally from 18 per cent to 16 per cent. The absolute number of Key Roles filled by Black and Racialized individuals also decreased relative to the previous year. In some cases, this decline was accompanied by a very slight decrease in the proportion of representation of Black or Afro-Canadian communities: five per cent to four per cent overall of Key Roles in linear content.

In the CMF’s Program for Racialized Communities (PRC), which requires that eligible applicants and the majority of Key Roles be filled by Black and Racialized individuals, reported representation in Key Roles also decreased from 70 per cent to 65 per cent. Although Ownership increased in Development and Predevelopment stages, this may primarily be attributed to higher participation rates rather than growth in representation within Key Roles.

BLACK AND RACIALIZED COMMUNITIES REPRESENTATION IN KEY ROLES FOR IDM FUNDED APPLICATIONS



BLACK AND RACIALIZED COMMUNITIES REPRESENTATION IN KEY ROLES FOR LINEAR FUNDED APPLICATIONS



Other fluctuations worth mentioning in reported representation from Black and Racialized Communities:

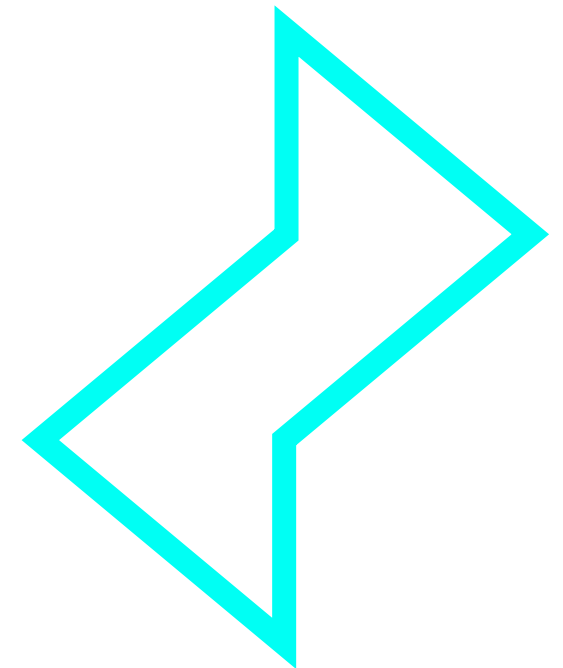
- a) **English-language projects:** Decreased representation in Key Roles from 25 per cent to 23 per cent, while remaining unchanged at eight per cent in French projects.
- b) **Drama:** Dropped from 24 per cent to 18 per cent in Key Roles, with declines in both English- and French-language applications.
- c) **Performance Envelope:** Representation in Key Roles fell from 13 per cent to 11 per cent.

In IDM programs, representation of Racialized Communities remained stable at 26 per cent, with Black or Afro-Canadian representation rising from one per cent to four per cent.

Black and Racialized Communities represent 26 per cent of PERSONA-ID's registry, and according to the 2021 Statistics Canada census, 27 per cent of the population identifies as a "Visible Minority," a term which broadly aligns with the CMF's definition of Black and Racialized Communities. It is important to remember that in key production hubs like Toronto and Montreal, these demographic levels are even higher.

OBSERVATIONS:

- **Engage with community:** The CMF can engage in dialogue with community organizations to receive feedback on the results of this report and consider perspectives for future analysis and reporting.
- **Support for existing companies:** The ASI team will use longitudinal data (collection of future years of PERSONA-ID data) to track the long-term stability and growth of both emerging and established companies owned by members of Black and Racialized Communities already active in production.
- **Further research:** Further quantitative and qualitative research is required across the industry to better identify the underlying needs and opportunities for talent and companies owned and controlled by Black and Racialized Communities.



6. DEMOGRAPHICS IN SELECTIVE VERSUS AUTOMATIC PROGRAMS



La clé Deschamps



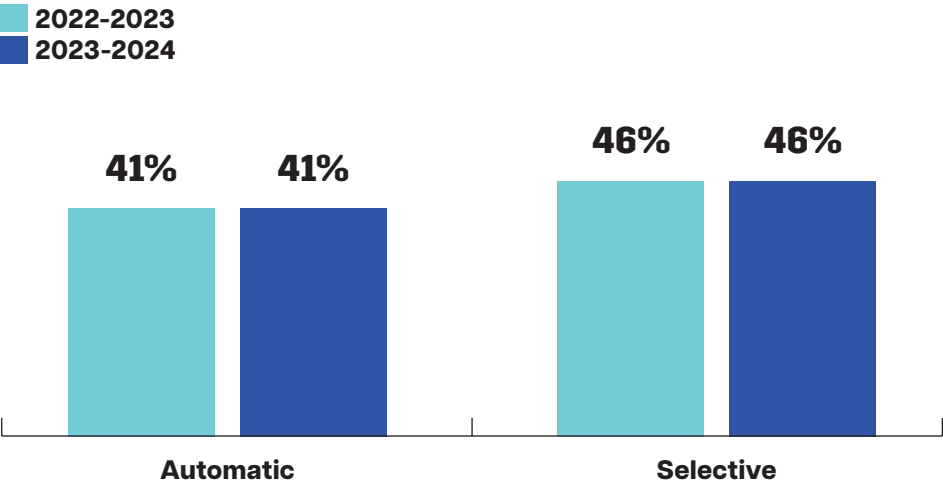
DEMOGRAPHICS IN SELECTIVE VERSUS AUTOMATIC PROGRAMS

The CMF’s selective programs generally show higher representation of Indigenous and Equity-Seeking Communities. This is likely because these programs are focused on a specific group or because they provide incentives for certain communities. In 2023-24, representation levels of women and Diverse Community members in linear selective programs exceeded the overall results for all CMF programs combined and saw an increase compared to 2022-23. For example, women accounted for 46 per cent and gender-diverse individuals for three per cent of Key Roles, while 60 per cent of all Key Roles were held by members of one or more Diverse Communities, compared to 47 per cent the previous year.

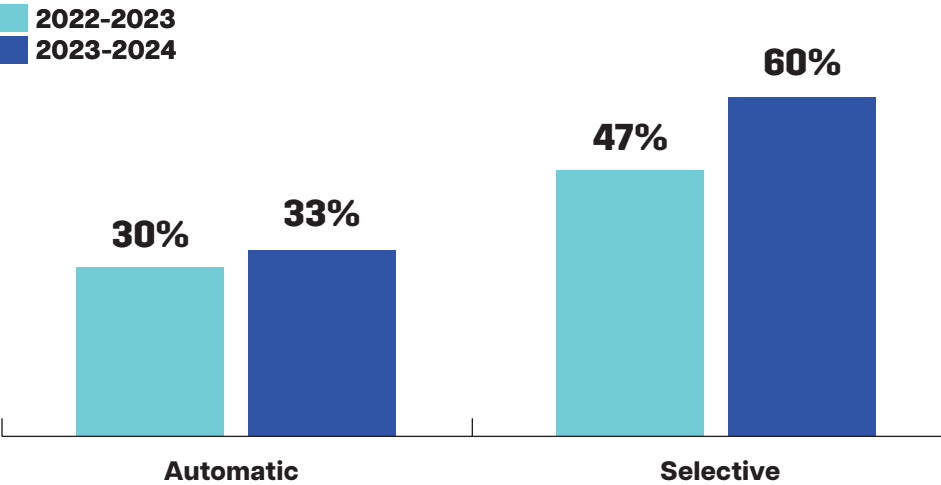
Women’s representation in Key Roles was particularly strong in the Diverse Languages Program (50 per cent) and the Indigenous Program (49 per cent), but lower in Digital Linear Series (37 per cent) and the Program for Racialized Communities (43 per cent). Diverse Community representation was notably high in the Indigenous Program (81 per cent), with a predictable strong presence of Indigenous people (70 per cent), but also of 2SLGBTQ+ individuals (16 per cent).

Programs not focused on a particular Equity-Seeking Community showed lower results in terms of representation of Diverse Communities. For instance, the POV Program had 44 per cent

WOMEN REPRESENTATION IN KEY ROLES FOR FUNDED APPLICATIONS



DIVERSITY REPRESENTATION IN KEY ROLES FOR FUNDED APPLICATIONS



of Key Roles filled by members of Diverse Communities, and the Digital Linear Series Program had 38 per cent. A notable exception was the new Digital Creators Pilot Program, where 62 per cent of Ownership was held by members of Diverse Communities, including 40 per cent from Racialized Communities, 19 per cent from Disabled Persons or Persons with Disabilities, and 12 per cent from 2SLGBTQ+ individuals, all of which can be considered demographically high.

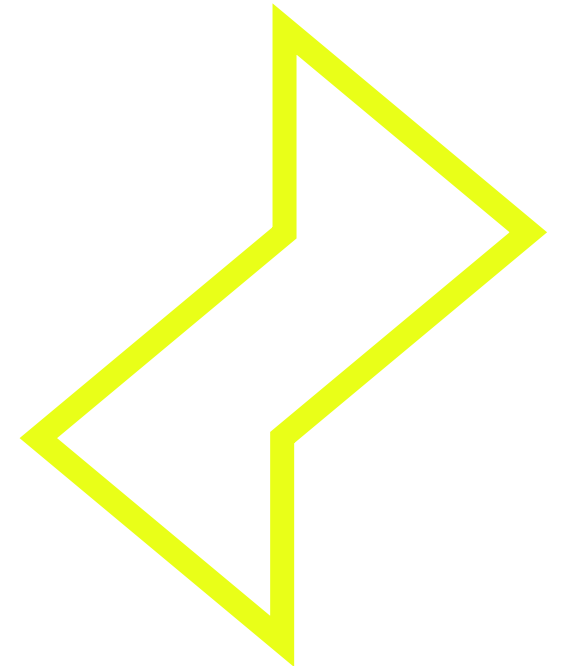
In the CMF's automatic programs, as previously mentioned, women's representation in Key Roles remained flat at 41 per cent, while representation of Diverse Communities stood at 33 per cent, below both the overall average for linear content (36 per cent) and the results in selective programs. In the CMF's largest program, Performance Envelope and related programs and bonuses, Diverse Community representation was particularly low at 29 per cent. Ownership levels were also low, with women and Diverse

Communities holding at 24 per cent and 27 per cent Ownership shares, respectively.

The results from the automatic programs, especially Performance Envelope, tended to therefore lower the overall CMF results for Indigenous and Equity-Seeking Communities.

OBSERVATIONS:

- **Tracking new factors:** The CMF will carefully monitor the impact of new factors for gender and Diverse Communities, particularly in Key Roles and Ownership, which should provide a more robust assessment of their success and effectiveness.
- **Objectives for Selective programs:** The CMF can set objectives for current and upcoming selective programs to improve the participation or growth of any given community, group, or genre.



7.

A FIRST GLANCE AT NARRATIVE POSITIONING



Essex County



A FIRST GLANCE AT NARRATIVE POSITIONING

In 2023-24, the CMF introduced a new “content question” in most funding applications, asking whether submitted projects “include or reflect storylines, main characters, or subject matter related to one or more of the following” Indigenous or Equity-Seeking communities.⁵ Applicants could select one or more communities or choose “none of the above.” This question was designed to complement the CMF’s Narrative Positioning policy and track its implementation.

Preliminary data shows that nearly two-thirds (62 per cent) of funded linear content selected at least one community, while

38 per cent chose “none of the above.” The most frequently selected communities were Racialized Communities (30 per cent) and women (28 per cent). When a community was selected, the representation of that community in Key Roles was notably higher. For example, in projects where 2SLGBTQ+ content was indicated (14 per cent), 28 per cent of Key Roles were filled by individuals from that community—demonstrating **a correlation between content and representation**. Similarly, for the six per cent of projects related to Official Language Minority Communities, 55 per cent of Key Roles were filled by individuals from those communities.

STORYLINE NARRATIVE	% OF WOMEN	% OF INDIGENOUS PEOPLE TO CANADA	% OF BLACK & RACIALIZED COMMUNITIES	% OF 2SLGBTQ+	% OF PERSONS WITH DISABILITIES	% OF OLMC
None of the above	40%	0%	6%	9%	3%	6%
Individuals who identify as women	49%	8%	21%	13%	6%	10%
First Nations, Inuit, or Métis	42%	40%	9%	9%	9%	12%
Racialized Communities	44%	4%	39%	12%	7%	10%
2SLGBTQ+	45%	6%	19%	23%	7%	10%
Disabled People or People with Disabilities	45%	1%	18%	15%	15%	8%
Official Language Minority Communities (OLMCs)	47%	9%	10%	14%	6%	55%
Regional communities	46%	16%	14%	11%	7%	15%

⁵ The options included First Nations, Inuit, and Métis; individuals who identify as women; Racialized Communities; 2SLGBTQ+; Disabled Persons or Persons with Disabilities; Official Language Minority Communities; regional communities; and none of the above.

However, there are observed differences between the English and French markets. In English-language productions, only 22 per cent of projects selected “none of the above,” compared to 59 per cent in French-language productions. This suggests that the majority of English content focused on at least one Indigenous or Equity-Seeking Community, while the opposite was true for French content. For example, 42 per cent of English projects featured Racialized Communities, compared to just 16 per cent in French. Similarly, 38 per cent of English projects focused on women, versus only 17 per cent of French projects.

Production budgets also revealed differences between the two markets. In English linear production, 82 per cent of large-budget projects (>\$10M) included at least one Indigenous or Equity-Seeking Community storyline narrative, surpassing medium- and small-budget productions. Conversely, 73 per cent of large-budget French projects (>\$5M) did not select any Indigenous or Equity-Seeking Community in the content question.

Although IDM projects had a smaller volume, 49 per cent included at least one storyline, main character, or subject matter related to an Indigenous or Equity-Seeking Community. However, 91 per cent of larger-budget IDM projects (>\$2M) did not include any of these communities. Among video games—representing 82 per cent of IDM projects—there was more frequent inclusion of content related to 2SLGBTQ+ and Racialized Communities.

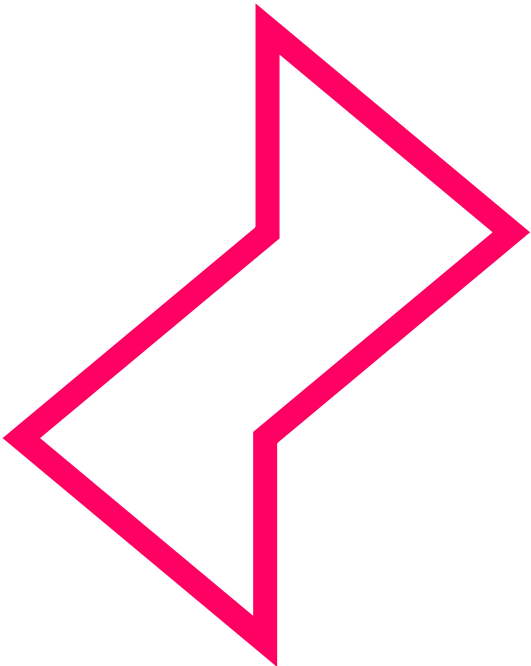
# OF STORYLINES NARRATIVE	ENGLISH % OF PROJECTS	FRENCH % OF PROJECTS
None of the above	22%	59%
1 storyline narrative	41%	25%
2 storylines narrative	15%	7%
3 or more storylines narrative	23%	9%
	520 Projects	471 Projects

BY BUDGET SIZE	ENGLISH		FRENCH	
	# OF PROJECTS	% OF PROJECTS WITH AT LEAST 1 STORYLINE NARRATIVE	# OF PROJECTS	% OF PROJECTS WITH AT LEAST 1 STORYLINE NARRATIVE
Large	22	82%	37	27%
Medium	99	73%	91	27%
Small	399	79%	343	46%
	520	78%	471	41%

OBSERVATIONS:

- **Continue data analysis:** The CMF will continue analyzing data from the “content question” and explore how it relates to programs, genres, and Ownership to uncover additional trends and patterns.
- **Engage in future qualitative research:** Further qualitative research may be conducted on Narrative Positioning statements and applicants' experiences with this process to gain deeper insights into its impact, effectiveness, and level of adoption in each linguistic market.
- **On-screen representation:** PERSONA-ID can be expanded in the future to include on-screen talent. With increased participation from performers, the CMF will be able to conduct proper content analysis and have a better portrait of on-screen representation, which is highly relevant for audiences and a notable request from consultations with industry partners and supporters.

IDM		
BY BUDGET SIZE	# OF PROJECTS	% OF PROJECTS WITH AT LEAST 1 STORYLINE NARRATIVE
Large	11	9%
Medium	12	50%
Small	144	51%
	167	49%



LOOKING FORWARD

The CMF's 2023-24 Demographic Report highlights a significant increase in participation, with improved representation of women, Indigenous Peoples, 2SLGBTQ+ individuals, and Disabled Persons or Persons with Disabilities. Representation by Black and Racialized Communities will continue to be monitored closely to assess long-term trends.

Selective programs consistently show higher diversity in representation, particularly for women and Indigenous Peoples, compared to automatic programs. Gaps persist in large-scale automatic programs like the Performance Envelope (previously called the Broadcaster Envelope), which may benefit from more targeted interventions. Meanwhile, the IDM sector continues to show strong representation and opportunity for growth among many communities, though more can be done in the future to expand these opportunities for Indigenous Peoples.

Early data from Narrative Positioning is encouraging, showing a correlation between content and the participation of Key Roles from Indigenous and Equity-Deserving Communities, particularly in English-language productions. However, the differences

between the English and French markets may suggest a need for focused interventions.

To improve measurement and monitoring of representation, the CMF could consider expanding PERSONA-ID to collect demographic data on additional roles, such as on-screen talent, other key creatives, and participants of projects funded through the Sector Development Support program.

Finally, as analysis of PERSONA-ID data continues, there is a growing recognition of the importance of industry-wide representation objectives and metrics of success. Many industry partners and supporters—including guilds, associations, and community organizations—suggest that establishing benchmarks will be key to promoting consistent progress. Moving forward, the CMF, in partnership with Indigenous and Equity-Deserving Communities, will continue to engage in national conversations on setting standards for demographic data collection and reporting. This shared priority will support the CMF's EDIA goals and guide future decisions across the industry.



SCOPE AND METHODOLOGY

DATA SOURCES

This report includes information related to applications submitted and funded in the CMF's 2023-2024 fiscal year from April 1, 2023 to March 31, 2024, sometimes compared with the results for the previous fiscal year (2022-2023). The primary data sources were:

- **PERSONA-ID:** CMF's self-identification system, for demographic information on Key Roles and shareholders.
- **Dialogue:** Telefilm Canada's online application platform that collects all project and program information. Telefilm Canada is the administrator of CMF Programs.
- **Corporate Declarations:** The "Declaration of the Corporation's Canadian Status and its Shareholders and Directors" is a required form for most applications to the CMF that specifies the Ownership shares held by individual shareholders and corporations.

DATA ANALYSIS

- The baseline data used to calculate results for this report was composed of all Key Roles and Ownership shareholders declared at the time of application in 2022-2023 and 2023-2024.
- Besides the demographic representation in linear and interactive overall content, the report focuses on EDIA programs, requirements, and incentives. However, not all programs with these criteria are analyzed individually.
- 0.5 per cent or 10 Key Roles were the minimal sample sizes for reporting. However, exceptions were made on a case-by-case basis to further aggregate results to ensure all personal information remains confidential.
- In the descriptions, most numbers are rounded off, with .5 decimals always rounded up to the next digit.

This report was produced by the Analytics and Strategic Insights department at the Canada Media Fund, in collaboration with the Growth and Inclusion team.

For a more detailed report on the demographic results, please review the full 2023-24 Demographic Report found in the Insights section of the CMF website.

For further questions or inquiries about this report and PERSONA-ID, please visit:

<https://cmf-fmc.ca/persona-id> or write to: persona-id@cmf-fmc.ca



CANADA
MEDIA FUND

FONDS DES MÉDIAS
DU CANADA

