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# FINANCIAL CONTRIBUTORS

The Canada Media Fund (CMF) receives contributions from Canada's cable, satellite and IPTV distributors and the Government of Canada. We thank our funding contributors for their continued support of Canadian television and digital media content.





















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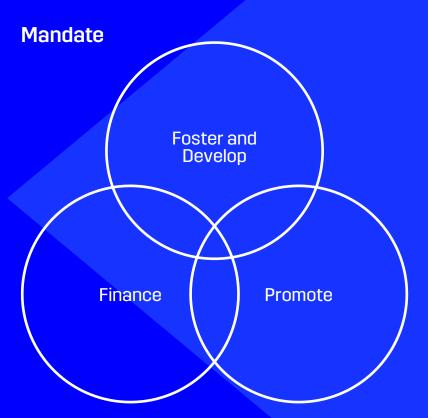




# MANDATE AND VISION

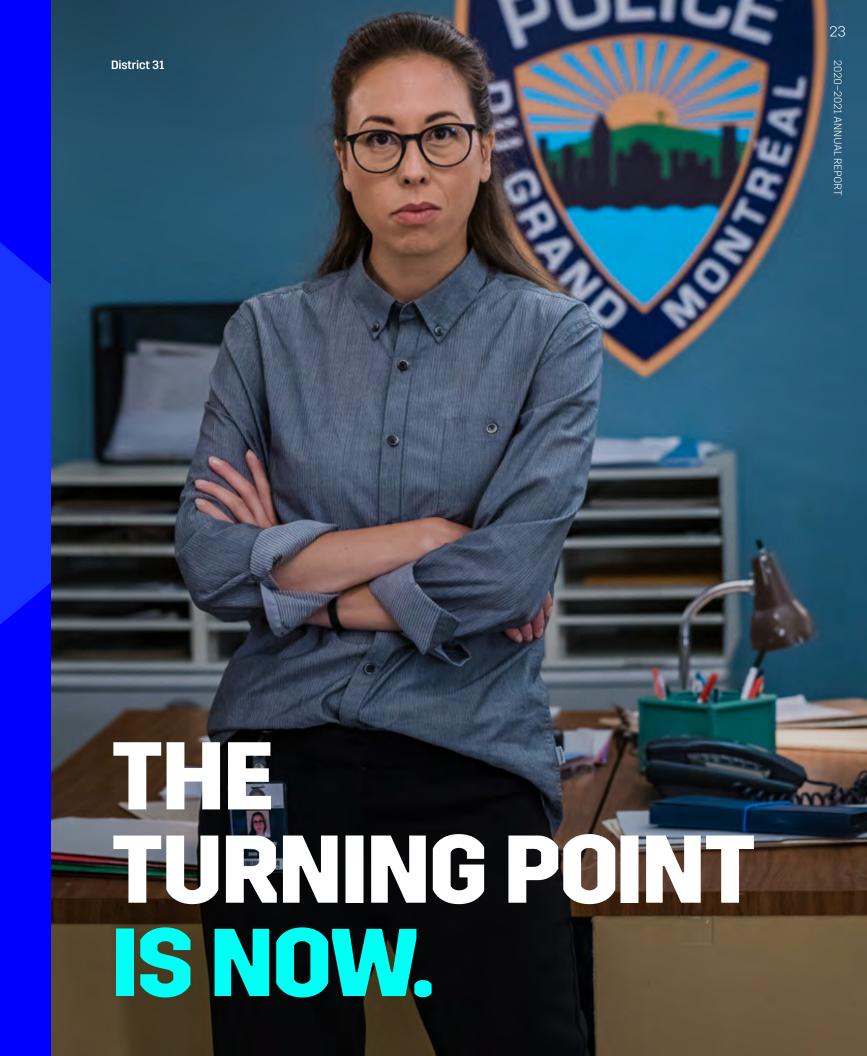
The Canada Media Fund fosters, develops, finances and promotes the production of Canadian content and relevant applications for all audiovisual media platforms.

The CMF guides Canadian content towards a competitive global environment through fostering industry innovation, rewarding success, enabling a diversity of voices, and promoting access to content through industry and private sector partnerships.



#### Vision

A world where Canada's talent and stories transcend platforms and borders, triggering emotion, innovation and ideas.



# FUNDING MODEL

The Canada Media Fund delivers financial support to the Canadian television and digital media industries through two streams of funding.

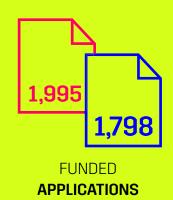
The Experimental Stream encourages the creation of leading-edge, interactive digital media content and software applications.

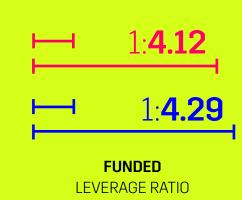
The Convergent Stream supports the creation of innovative, convergent television and digital media content for consumption by Canadians anytime, anywhere.



**COMPARING** 

1,309 NUMBER OF **PROJECTS FUNDED** 





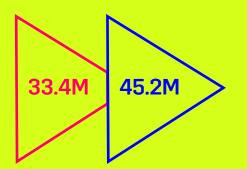






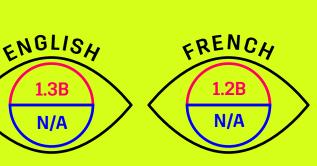
**FUNDS DISTRIBUTED TO EQUITY** AND SOVEREIGNTY-SEEKING **GROUP-OWNED ENTITIES** THROUGH EMERGENCY FUNDS

#### CMF FINANCING AWARDED TO **DIGITAL MEDIA PROJECTS**

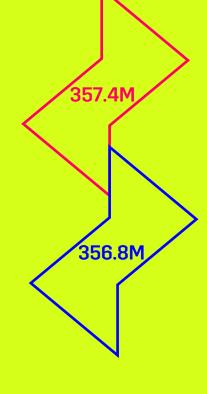


#### **AWARDS WON** BY CMF-FUNDED PROJECTS



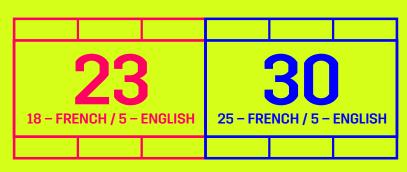


#### HOURS SPENT WATCHING CMF-FUNDED PROGRAMS, BY LANGUAGE

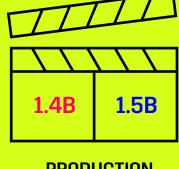


YEAR-OVER-YEAR

PROGRAM BUDGET \$M

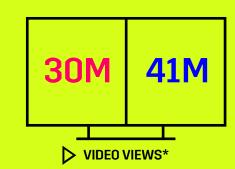


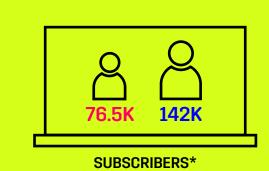
**CMF-FUNDED PRODUCTIONS DELIVERING OVER 1 MILLION VIEWERS** 



**PRODUCTION ACTIVITY** 

#### encore+







\*Figures are cumulative

# CANADA MEDIA FUNI

# MESSAGE FROM THE CHAIR

Guided by its purpose and values, the CMF listened, adjusted, and delivered. While steering through some of the greatest challenges we have ever seen, the Canada Media Fund continued to deliver for its stakeholders. It succeeded despite tremendous barriers and put the health and well-being of staff, clients, communities and colleagues first. And despite the difficulties of our new reality, the CMF listened and began to reinvent itself.



On behalf of the CMF's Board of Directors, I am pleased to report on the 2020–2021 activities of the organization. Amidst many challenges, the CMF and its staff demonstrated agility, adaptability and resilience, with noteworthy accomplishments that include:

- Timely administration of the CMF's regular programs and activities
- Developing and launching 11 new COVID-19related programs
- Reorienting the CMF towards a more equitable ecosystem
- Launching an ambitious and comprehensive consultation process
- Developing and launching a new corporate brand

Backed by the management team, who prioritized the health, safety and well-being of all team members, CMF and CMF Program Administrator staff transitioned to working remotely without missing a beat. Their incredible effort ensured that all regular work continued without any adverse effects on clients or the administrative budget.

And while the Board stepped in to provide additional support, sound guidance, and oversight, we want to express our ongoing

confidence in – and gratitude to – the President and CEO, the executive leadership team, and the entire CMF and Program Administrator teams. Your focus and determination in everything you did demonstrated results.

We are grateful to the Government of Canada for its ongoing and significant investments in Canadian audiovisual production and innovation, and for the trust it placed in the CMF to administer \$120M in COVID-19 Emergency Relief Funds. We heard from many recipients how crucial the help was in these very difficult times. Thanks also to the CMF's private funders: the country's cable, satellite and IPTV distributors – your contributions ensure that our storytellers, creators, producers and talent will continue to be present on screens around the world.

Not only did the COVID-19 pandemic completely shut down the sector's activities for a period of time, but it continues to challenge us today. As we move forward, I have every confidence that the CMF's organizational depth, strength and financial footing will keep the sector on the road to a robust recovery.

/ Van Cohorlean

Alain Cousineau

Chair of the Board of Directors

# CINITA MEDIA ELINID

# MESSAGE FROM THE PRESIDENT AND CEO

Historic challenges create opportunities to reimagine our future. The last fiscal year was one of the most difficult in the history of the screen-based sector. At the beginning of the pandemic, the industry essentially came to a halt. Businesses were shuttered. Production shut down. In response, the industry showed resilience and innovation, finding ways to return to work safely and to continue making great content and experiences. At the Canada Media Fund, we began to work with our storytellers, creators, companies and communities to reimagine what the future – and a new CMF program model – could look like.



Leadership and collaboration are critical in any crisis. Since the pandemic began, we have seen businesses, industry organizations and other funders work alongside government to support and advocate for programs and policies that mitigate problems and implement recovery measures. We are grateful to the Government of Canada for its emergency support. Thanks to the \$120M in COVID-19 Emergency Relief Funds the CMF administered, businesses in our industry were able to maintain operations, ensuring a quick return to production and stability when they needed it the most.

We also saw how the pandemic exposed systemic racism and other forms of discrimination in our industry and elsewhere. The CMF committed to address barriers to equity and inclusion, lack of representation, and accessibility issues and gaps in our programs. We are indebted to many leaders in the screen industries for their contribution to this work: the Black Industry Leaders Group, the Indigenous Screen Office, and many representatives from racialized and other equity-seeking groups who contributed to our consultations throughout the year. Their experience and expertise informed our decisions and actions, including developing an Equity and Inclusion Strategy for the next three years; hiring specialists from under-represented communities to lead outreach efforts; consulting with hundreds of Black, racialized and Indigenous storytellers; and laying the groundwork for a more equitable funding ecosystem.

Informed by consultations with industry members and producers from diverse communities, the CMF also disbursed \$9M through two different initiatives: a \$1M BPOC Sector Development Fund and a \$8M COVID-19 Emergency Relief Fund – Allocation for Companies Owned by Black People and People of Colour. And through our Emergency Relief Fund, we were able to continue supporting the Indigenous Screen Office, providing \$5.2M in funding for their programs.

The CMF's purpose has always been to support Canadian creators and companies in making great content for audiences to enjoy – and we continue with that mandate. In 2020, CMF funding triggered \$1.5B in production activity across the country and created over 244,000 jobs. Every \$1 in CMF funding generated \$4.29 in production activity, slightly higher than last year's \$4.12. But we couldn't do this alone. The key role the CMF plays in Canada's screen-based sector is due to the continued support of our funding contributors, the Government of Canada, and Canada's cable, satellite and IPTV distributors.

CANADA MEDIA FUND

Even before the pandemic, the screen industry had been experiencing profound changes. The CMF recognizes the need to adapt our program model – which is more than 10 years old – to better support the realities of today's industry: global, diverse, multi-platform, iterative and where content continues to be king. To help us build this new model, in March 2021 we launched our most ambitious industry consultations to date. Thank you to all who took part – your input is critical as we chart the recovery and growth of our industry. We look forward to sharing the results of our consultations over the coming year, along with progressive changes to our programs.

A very special thank you to the CMF's Board of Directors for your leadership and guidance during these extraordinary times, and to the CMF staff for your tireless efforts and adaptability – you never fail to impress me. All of you sparked courage in a year when we really needed it. I would also like to acknowledge the CMF Program Administrator, Telefilm Canada, and their commitment to providing stellar client service.

I have great confidence in the future of our industry. The challenges we face and continue to overcome demonstrate the resilience of our creative community and the vision of our stakeholders. I have no doubt that our dedicated industry professionals will help us build an inclusive, innovative and sustainable future that will propel Canada's talent and stories to new heights in the global marketplace.

Valerie Creighton, C.M., S.O.M.

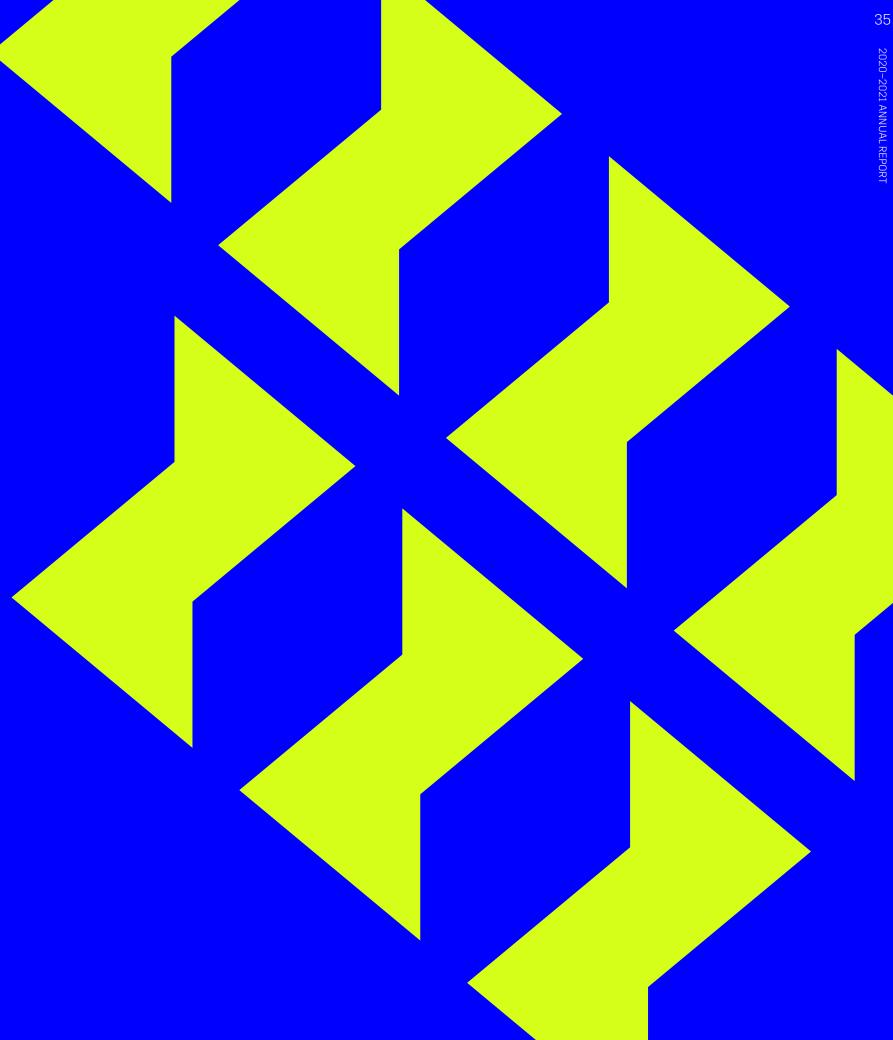
President and CEO



# MEET SEVEN ACCOMPLISHED CREATORS WHO INSPIRE

Their work is award-winning and eye-opening

The CMF supports storytellers who are talented, courageous and determined. Their work reaches audiences around the world and sparks passion for Canada's stories.





# **ANN SHIN**

When Ann Shin lost her father to dementia, she wanted to do something in his memory, but also about the concept of memory itself. She set out to make the CMF-funded documentary film *A.rtificial I.mmortality* as a vehicle to explore artificial intelligence and immortality.

"Every documentary starts off for me like a shot in the dark," says the Toronto-based filmmaker, TV producer, writer and mom of two – whose Emmy-nominated short doc *My Enemy, My Brother* (2015) made the Oscar shortlist.

"I have this gut feeling of what the film's going to be about, then embark on it and a lot changes."

When the editors noted Ann's human journey could "ground" the film's abstract concepts, she showcased her story. "I'm glad I did. I don't always get to do projects with my family, but this was great to do with them. It actually helped me come to peace with where my father's at and to appreciate the connection we still have."

While the pandemic delayed *A.rtificial I.mmortality*, filming in a closed set helped a
reluctant Ann embrace the idea of advanced
technology as an awesome tool – "if deployed
within a proper ethical framework." Yet even if
memories, thoughts, emotions could be preserved,
she feels no clone or avatar "could assuage the
pain of death or replace the real person."

Her bet paid off: the film was received with rave reviews on opening night at the Hot Docs Canadian International Documentary Festival and is now having a remarkable international run.







"... it's my hope that it brings to light the truth for everyone to see."









## DANIS GOULET

Her sci-fi movie is set in a postwar future, yet looks at the atrocities of our colonial past.

"Everything in the film has already happened in history. It's set in the future, but takes everything from reality and reapplies it in a new space," says Cree-Métis director and writer Danis Goulet about her dystopian debut feature *Night Raiders*, heading to the Toronto International Film Festival (TIFF) this fall.

Funded by the CMF, this Canada-New Zealand coproduction addresses "the impact of colonial policies on Indigenous people."

A force to be reckoned with, Danis became Executive Director of imagineNATIVE Film and Media Arts Festival in 2004. This "changed her universe," in part through the joy of Indigenous audiences seeing themselves represented onscreen. Learning Cree, one of the film's languages, has been "one of the most important things" in her life. She attends Cree immersion camps, and online conversation groups with other Cree-language learners.

While writing *Night Raiders*, Danis "listened to a lot of the Truth and Reconciliation Commission hearings."

"This is a really heavy time and all the communities across Canada are really in a state of mourning," she replies, in light of the discovery of thousands of unmarked graves near residential schools. "Our communities have known this truth for a long time, we've been talking about residential schools, we're just immersed in stories... There was something about the findings in Kamloops that brings it all up again, but it's my hope that it brings to light the truth for everyone to see."

"I made Night Raiders wanting to talk about this truth," she says. "I chose to do it as a genre film to give everybody a fresh entry point in, because it's easy to turn away from it, it's very heavy, it's hard to look at and hard to hold, it's so important that we find 'ways in' to talking about it. Because I don't know how we can move forward as a country if you're not willing to grapple with this."

"We must grapple with it if we want to ask ourselves who we want to be as a country for the future, if we look back and say we recognize this country was founded upon the death of Indigenous children and genocide, that's a really heavy thing to look in the face. But we have to dare to go there if we want to go forward in the right way."





## FLOYD KANE

"These spaces are for you too. We can be inclusive here."

When creating the CMF-funded series Diggstown, one of Floyd Kane's intentions was to change how Canadians think about his province's spaces. He remembers some Tourism Nova Scotia ads of his youth: people "dining on lobster, going sailing, swimming and surfing, and they were all white."

"It's important to put Black and Indigenous people front and centre in all of those spaces as a way of saying, 'These spaces are for you too. We can be inclusive here."

The Nova Scotia-raised creator, executive producer, and showrunner excitedly mentions

a new real-life surfing movement at Martinique Beach, where "young Black girls are now taking up surfing." It's inspired by the show's heroine, a legal aid lawyer played by Vinessa Antoine – one of the first Black female leads of a Canadian television drama series.

Floyd earned his law degree from Dalhousie University, and worked as a lawyer in the film industry while also writing his own screenplays. In 2010, he started the independent Freddie Films, producing projects such as 2015's awardwinning film *Across the Line*, which he wrote, and *Diggstown*, now in its third season, airing this fall on CBC, and on Fox in the US.

The pandemic hit the province while the show was shooting its latest season. Production was shut down for several days to protect the cast and crew's physical and mental health. Indeed, Floyd feels the COVID pandemic has "laid bare" many societal issues: "There's a lot of systemic rot within our society. With *Diggstown* we've tried to shine a light on these things, get people to think about and ruminate on them."

Empathy, he says, helps his team of writers weave these complex, important stories with authenticity and truth. And inspiration is always easily found in the great Nova Scotian outdoors.





## **JEAN-PHILIPPE** DION



Well-known as the man with a thousand and one ideas, a TV host and Productions Déferlantes co-owner, Quebecer Jean-Philippe Dion never imagined he'd be working so hard during a pandemic. "At first, I thought the industry would grind to a halt," he said. "Turns out we had our best year ever!"

Over the past few months, Jean-Philippe and his team put their ingenuity and innovation to work in creating two huge event-based programs at a time when viewers were locked down in their living rooms and just itching to be entertained. The biggest challenge was doing the shoots while respecting ultra-strict social distancing measures.

The first show Jean-Philippe produced was for Télé-Québec and TVA. Une chance qu'on s'a featured some 80 Quebec celebrities paying tribute to those working on the front lines in the fight against COVID-19. With support from MADE | NOUS, Une chance qu'on s'a raised \$2 million for Little Brothers and SOS violence conjugale.

Jean-Philippe also produced Star Académie daily episodes and galas for millions of fans to enjoy. Tons of young viewers tuned in because they could easily identify with the highly diverse range of candidates taking part. "We've been able to show that our content can go toe to toe with the big American streaming platforms and win," said Jean-Philippe. The CMF is a major funder of this TVA flagship program.

Jean-Philippe is now focusing on producing and hosting Season 4 of La vraie nature. Episodes are being shot in a new chalet located in his original stomping grounds, the Eastern Townships. He and his partner are fostering a child under youth protection, so he also plans to spend quality time with his new family. "Being there for my 11-yearold foster son gives me the opportunity to get some balance between my professional and personal life," he said.

## JULIE O'BOMSAWIN

Abenaki executive producer Julie O'Bomsawin started off in the film business working, among other things, as assistant director on numerous Indigenous documentaries not long after graduating from UQÀM in 2001. "Being an Indigenous woman is a political act in itself," she said. "My goal is to make meaningful, sensitive television that goes beyond mere entertainment."

As proof of the courage of her convictions, she co-founded Kassiwi Media, the production company where she is President, Producer and Executive Producer. Since then, she has consistently promoted inclusion and authentic representation of Indigenous communities onscreen. To that end, Kassiwi Media employs Indigenous interns, creators and consultants on all productions to ensure the development of a strong and proud next generation of screenindustry players.

Over the past few months, Julie has been working on an edutainment series for 8- to-11-year-olds – Les Autochtones, tu connais? – with

support from the CMF. Combining archival and current footage, 2D animation and live action, each of the eight 30-minute episodes is based on a First Nations, Métis or Inuit theme. While some of the filming in communities has been postponed or cancelled altogether due to the pandemic, the series is still expected to be ready for broadcast on TFO in 2022.

Julie believes there is strength in diversity and wealth in numbers. She's been participating recently in roundtables on Indigenous representation onscreen with the CMF, Société de développement des entreprises culturelles (SODEC) and the Indigenous Screen Office. "Collectively, we need to build bridges between Indigenous and non-Indigenous communities so we can better understand our shared history, pass it on to our children and create a world more open to diversity," Julie said. "It's a long-term project that's certain to be of benefit to everyone."







# TRACEY DEER

When Tracey Deer was growing up in Kahnawake, an angry mob threw rocks at her and her family during the 1990 Oka Crisis. Police did nothing, she recalls.

"What that said to me is that I was worthless. If these adults were able to do that to us and the police said it was okay, the only thing my 12-year-old mind could come up with was, 'There's something wrong with me, I'm worthless,'" recalls the Mohawk filmmaker.

The "devastating" moment is recreated in a scene in her debut feature *Beans*, which premiered at TIFF, had a successful national theatrical run and won many awards, including Best Motion Picture at the Canadian Screen Awards.

The CMF-funded *Beans* "is about a little girl coming of age in this very dark, watershed moment in Canadian history, and realizing what it means to be an Indigenous person in this country." She confesses that, while it was scary to "expose the insides of what makes me tick and some of my biggest hurts," putting the film into the world was also exhilarating, empowering and healing.

"That little girl needed to be seen, heard and understood. Because if that existed, I would like to think the Oka Crisis would not have played out as it did. Canadians would not have allowed that to happen. Those in power would not have sent tanks to point at my home and my family."

In everything she creates, including the renowned series *Mohawk Girls* that she created with Cynthia Knight, Tracey seeks to build bridges with the larger population. "It's so important that our world becomes safer and more welcoming for Indigenous people, for Indigenous kids. I want people to see us, hear us and understand us. I want Canadians to care and act so things get better."

"I want them to feel empowered to make a difference and go out into the world seeking to make that difference. This film is a call to action so these types of events stop happening, and our Indigenous kids are able to dream and believe anything is possible for them."



"I want them to feel empowered to make a difference and go out into the world seeking to make that difference."













# ZIAD TOUMA

Since arriving in Quebec at the age of 10,
Lebanese-born Montreal director and producer
Ziad Touma is still surprised when he turns on
his television. The content doesn't reflect his
life or that of his friends, whom he has met in
multicultural schools in the Ahuntsic-Cartierville
borough or at Concordia University.

He says it's one of the reasons why, in 1999, he founded the Couzin Films production company to focus on inclusion and identity issues within racialized and LGBTQ+ communities. Ziad often tackles themes like these with the help of film, television and emerging media.

His most recent creation, *Les Passagers*, was already in production when the pandemic hit. Coproduced by the French company Les Produits Frais and with the support of the CMF, this interactive virtual reality (VR) fiction invites participants to enter the minds of four passengers on a train, including an Afrodescendant man and an elderly lesbian.

Before the lockdown, Ziad's idea was to create a physical installation where participants would take their seat in the centre of a train setting. To comply with health directives, he and his team developed a downloadable version that could be experienced anywhere with a connected VR headset. The new formula generated very positive feedback at the Newlmages Festival in France, the Festival du nouveau cinéma (FNC) in Canada, SXSW and Tribeca in the US, and the Boucheon International Fantastic Film Festival (BiFan) in South Korea.

As a founding member of Coalition M.É.D.I.A. (Media, Equity, Diversity, Inclusion, Accessibility), Ziad is committed to ensuring that producers and creators from under-represented communities have access to more equitable sources of funding to produce innovative interactive projects, and that they retain their own stories. "Since the pandemic, new voices are being heard with truly inspiring stories," he said. "Let's hang in there and see what the future holds," he concludes optimistically.

# CANADA MEDIA FUNI

# BOARD AND COMMITTEE ACTIVITIES

Composition of the Board (as at March 31, 2021):

Barry Chapman
Alison Clayton
Alain Cousineau (Chair)
Lori DeGraw
Guy Fournier
Gary Pizante
Michael Schmalz

The CMF's Board of Directors is responsible for the stewardship of the Corporation, including oversight of the Program and the Corporation's other activities, taking a leadership role in the development of the Corporation's strategic direction, and ensuring that management conducts the business and affairs of the Corporation in accordance with its objectives.

The Corporation's Board of Directors is fully independent from management, its funders and any beneficiaries of the CMF Program. Directors are nominated by the Corporation's members: the Canadian Coalition for Cultural Expression (CCCE), which represents Canada's cable, IPTV and satellite distributors (five directors), and the Government of Canada, as represented by the Minister of Canadian Heritage (two directors).

The CMF and its Board of Directors are committed to adhering to best practices in corporate governance to ensure that the Corporation is managed responsibly for the benefit of its members, industry stakeholders and the public.

As part of this commitment, the Board of Directors has adopted a:

- Statement of Corporate Governance
   Principle, which defines the CMF's governance structure, describing the role of the Board and its mandate, the Committee structure, code of business conduct, and accountability for the responsible management of the funds contributed by its funders to the CMF Program.
- Board Charter, which outlines the duties and responsibilities of the Board, as well as that of each Director.
- Code of Business Conduct, which applies to all of the Corporation's directors, officers and employees and which promotes:
- honest, responsible and ethical conduct,
   including the ethical and responsible handling
   of personal and professional relationships
- compliance with the terms of the
   Contribution Agreement and all applicable
   laws, rules and regulations
- full, fair, accurate and timely disclosure in the reports that the Corporation files with the Department of Canadian Heritage in accordance with the Contribution Agreement and all other public communications
- prompt reporting of any known or reasonably suspected violations of the Code

## Highlights of Board Activities in 2020–2021

2020 was an unprecedented year for the entire world as the COVID-19 pandemic resulted in nationwide lockdowns around the globe as of March. The CMF Board of Directors were actively meeting and corresponding with management throughout this period to keep abreast of the situation and its impact on the organization and its personnel, as well as its ability to deliver on its mandate and support to the industry.

As the pandemic lockdowns created increasing economic pressure on the Canadian screen-based industry, the Canada Media Fund, along with the financial assistance from the federal government through the Department of Canadian Heritage, administered additional COVID relief funding programs across all sectors of the industry. The Board was actively involved with management in this process to ensure the administration of these new programs, as well as the continuation of the CMF's original mandate and a consideration of its future role in this new dynamic, as the pandemic fully exposed the fragility of the Canadian system that was built over the last 30+ years.

Concurrently, the Board also oversaw an exceptional consultation process as the Canada Media Fund not only participated in many industry taskforces and led ongoing consultations in order to gauge and understand the impacts from the pandemic, but also spearheaded a consultation process with under-represented and especially racialized stakeholders within the Canadian screen-based industry in response to the societal upheaval around systemic racism. The focus of the discussions covered systemic barriers to CMF funding, immediate recommendations for COVID-19 Emergency Relief Funding aimed at racialized communities and broader recommendations for how the CMF can evolve its funding architecture in the future.

# BOARD COMMITTEES

The Board has two standing committees: the Audit Committee, and the Governance and Human Resources Committee.

## Composition of the Committee 2020–2021

Barry Chapman Guy Fournier Michael Schmalz (Chair)

#### **Audit Committee**

The primary function of the Audit Committee is to assist the Board of Directors in fulfilling its corporate governance and oversight responsibilities with respect to financial reporting, internal controls and risk management, treasury and external audit activities.

The Audit Committee has adopted a **Committee Charter**, which outlines its duties and responsibilities. The charter is reviewed regularly by the Committee in consultation with the Governance and Human Resources Committee and updated as required.

#### Activities in 2020-2021

Financial Reporting and Financial Statements – reviewed quarterly financial reports and recommended the annual audited financial statements to the Board for approval; reviewed a number of administrative policies.

**External Auditor** – recommended the appointment of the external auditor; reviewed and approved the audit plan, scope of work and compensation. The Committee met in camera with the external auditor.

Internal Controls and Risk Management – oversight of internal controls including review of the annual report on the Internal Controls over Financial Reporting; reviewed insurance coverage, and received quarterly risk reports on financial, legal and operational risks.

The Committee also reviewed the Annual Business Plan and Budget.

Alison Clayton Lori DeGraw (Chair) Gary Pizante

#### Governance and Human Resources Committee

The primary function of the Governance and Human Resources Committee is to assist the Board of Directors in fulfilling its responsibilities with respect to corporate governance and human resources management.

The Governance and Human Resources Committee has adopted a **Committee Charter**, which outlines its responsibilities and duties. The Charter is reviewed regularly and updated as required.

#### **Activities in 2020–2021**

**Corporate Governance** – managed the Board assessment processes; oversight of the director orientation program, director development program and the Board competency matrix.

**Human Resources** – reviewed the President and CEO's annual goals and objectives, and monitored performance against those goals and objectives. The Committee reviewed the succession policies and plans for the President & CEO as well as for the COO/CSO.

The Committee also reviewed the compliance with the Consultation policy and approved the 2020–2021 consultation plan; reviewed the outcome of the applicant issues addressed through appeal mechanisms; and reviewed the statements of the Board Chair and the President and CEO in the CMF's Annual Report.

## Director's Compensation 2020–2021

The policy for directors' compensation was developed by the two Members of the Corporation in 2009. The policy is reviewed at the annual meeting of Members and includes the fee scales for the annual retainer and meeting fees. The fee scales for 2020–2021 agreed by the Members were as follows:

#### **Annual retainer**

Chair of the Board - \$58,859 Committee Chairs - \$45,717 Other Directors - \$35,295

#### Meeting fees

\$1,413 for a full day meeting (8 hours including travel)

\$706 for a half-day meeting (4 hours including travel)

## Board and Committee Attendance 2020–2021

	Board Meetings	Board Calls	Audit Committee	Governance & HR Committee		
Total Number of Meetings	5	4	4	4		
		Number of meetings attended				
Barry Chapman	5	4	4	-		
Alison Clayton	5	4	-	4		
Alain Cousineau	5	4	4	3		
Lori DeGraw	5	4	-	4		
Guy Fournier	5	4	4	-		
Gary Pizante	5	3	_	4		
Michael Schmalz	5	3	4	_		

# CANADA MEDIA FUNI

# BOARD MEMBERS

## ALAIN COUSINEAU

#### **CHAIR, BOARD OF DIRECTORS**

Alain Cousineau is a seasoned senior executive with over 30 years of Board experience. Alain formerly held positions as President and CEO of Loto-Québec and Groupe Secor. He is also a former Chair of Tourisme Montréal and Société des alcools du Québec. Prior to that, he had a distinguished career in the academic field, primarily at the Université de Sherbrooke School

of Business. Alain has also held Board positions in a diverse range of industries including the healthcare, life sciences and pharmaceutical industries, aeronautics and electronic business solutions. He has extensive consulting experience in marketing and communications and corporate planning and strategy.

## BARRY CHAPMAN

As a Chartered Professional Accountant, Barry Chapman has over 30 years' experience in the telecommunications industry at the executive level, extensive knowledge in regulatory affairs, mergers and acquisitions, as well as strategic and financial planning.

He held the role of Vice President, Regulatory Affairs at Bell Canada between 1989 and 2017. He brings extensive corporate governance experience, having sat on numerous Boards.

## ALISON CLAYTON

Alison Clayton is an independent television and film consultant with multiple Gemini Award credits. Highlights from her career include serving as General Manager of the Biography Channel; Vice President of Programming for The Movie Network, Moviepix and The Family

Channel; and Senior Film Policy Advisor for the former federal Department of Communications. She has served on the Ottawa Art Gallery Art Auction Committee and the Boards of the Rogers Documentary Fund, the Alliance for Children and Television, and the Canadian Television Fund.

## LORI DEGRAW

Lori DeGraw is VP Partnerships and Member Engagement at Innovation Asset Collective. Lori brings 25 years' experience in the audiovisual industry. She held the role of VP Media Operations at Blue Ant Media for 10 years, and over the course of nearly 15 years before that, held various roles within the broadcaster and independent production community, including as Executive Producer, Director and Senior Series Producer. She brings extensive corporate governance experience, having sat

on numerous Boards during her career, including currently on the Canadian Olympic Committee Board of Directors.

She holds a BA in Political Science from Western University and completed the Director Education Program (DEP) corporate director designation in conjunction with the Institute of Corporate Directors and University of Toronto Rotman School of Management in October 2019.

## **GUY FOURNIER**

Guy Fournier is an author, playwright, story editor, film producer and screenwriter with more than 300 television dramas, feature films and plays to his credit. He was a founding member and President of the Institut québécois du cinéma and served as National Vice President of the Academy of Canadian Cinema and Television and President of the Academy's Quebec chapter.

He has served on the Boards of Oxyx-Films Inc., SMA Inc. Télé-4, Les Productions du Verseau Inc., Télévision Quatre-Saisons, Télé-Québec and CBC/Radio-Canada. He currently serves on the Board of Le Théâtre du Rideau Vert and is a founding Board member of La Fondation Jeanne-Mance. He is a member of the Order of Canada.

## GARY PIZANTE

Based in Calgary, Gary Pizante has since 1988 held positions with increasing responsibility in the Canadian telecommunications, cable and satellite business.

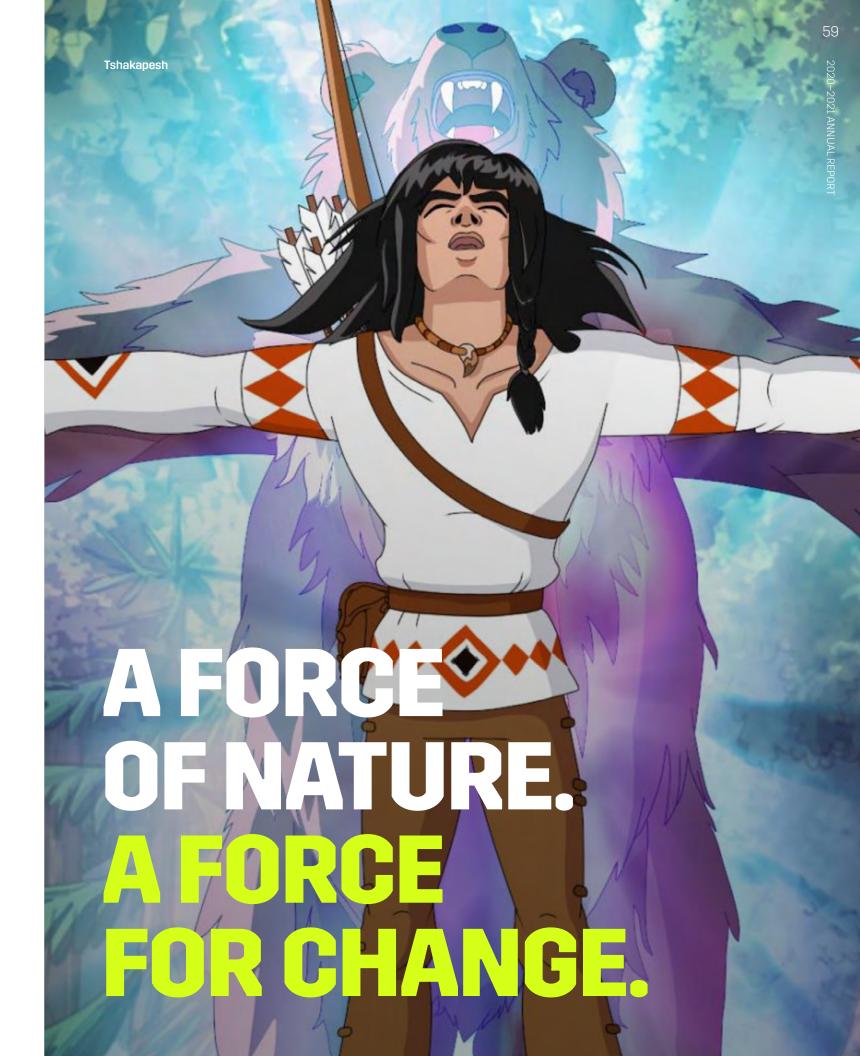
He brings extensive experience in financial and economic analysis. Mr. Pizante was previously

Vice President, Pricing and Analytics at Shaw Communications. He has a Master's Degree in Economics from Michigan State University and a Master's Degree in Communications from the University of Denver.

## MICHAEL SCHMALZ

Michael Schmalz is President of Digital Extremes, a top development studio in the interactive entertainment industry. Dr. Schmalz has over 17 years of experience in the digital media industry, focusing his attention on innovation in the gaming sector.

Prior to that, he practiced as a civil engineer. He holds several degrees including a PhD, MA and MESc from Western University, and an MBA from the Schulich School of Business. Dr. Schmalz is a Chartered Professional Accountant, a Licensed Professional Engineer and a Chartered Director.



# 2021 APPOINTEES TO THE CMF BOARD OF DIRECTORS

In 2021, the CMF welcomed the appointment of three new Board Directors. The industry will benefit from their extensive experience and diversity of perspectives as the CMF charts its course during these times of change.

## JASON BADAL

Jason Badal is Director, Multinationals at Shopify. In this role, Jason is global head of the Multinational segment within Shopify tasked with transforming and bringing mass adoption of e-commerce to the world's largest companies. Prior to Shopify, Jason led Business Affairs and Development at Rogers Media and Sportsnet.

Prior to that, he served as Head of Business and Legal affairs at Score Media. Jason practised as a technology and corporate lawyer at McCarthy Tetrault LLP, taught at Ryerson University and Osgoode Hall Law School, and serves as an advisor to several start-ups in the sports, technology and direct-to-consumer commerce industries.

# **CHANTALE COULOMBE**

A lawyer by training, Chantale Coulombe practiced intellectual property for nearly 20 years at the national firm Norton Rose Fullbright, where she was a partner. Subsequently, she held the position of Vice-President, Corporate and Legal Affairs of the ComediHa! Group, a major creator of audiovisual content in Quebec. Ms. Coulombe is currently President and Chief Executive Officer of the College of Corporate Directors at Laval University. She chaired the

Jeune Chambre de commerce de Québec, was one of the founding members of the Centre de la Francophonie des Amériques and sat on the Board of Directors of the Table de concertation de l'Industrie cinématographique et télévisuelle de Québec. She is currently a member of the Board of Directors of Arsenal Media, and of the Ethics and Governance Committee of the Office du tourisme de Québec. Ms. Coulombe is a Chartered Director (C.Dir.).

### **SANAE TAKAHASHI**

Sanae Takahashi is an experienced strategic planner and marketing professional, now retired, with 20 years of executive experience in the Canadian broadcasting and telecommunications industry. She served since 2016 as Senior Vice President, Planning, Insights and Business Models at Shaw Communications after holding various senior leadership roles at Shaw.

Prior to that, she held the role of Vice President, Consumer Marketing at Rogers Wireless.
Her professional experience has centred on responding to customer needs and expectations in the context of media and telecommunications products and services. She holds a BSc in Molecular Biology from Concordia University.

# CANADA MEDIA ELIND

# MANAGEMENT TEAM

# VALERIE CREIGHTON

#### **PRESIDENT AND CEO**

Valerie Creighton is an industry leader in arts, culture and media, recognized for re-energizing some of the country's most important organizations in the sector over the last 35 years. An expert in organizational change, Valerie has been recognized as a visionary in promoting Canada's cultural wealth.

Currently serving as President and CEO of the Canada Media Fund, Valerie positions
Canadian programming at the forefront in world markets, advocating successful, innovative
Canadian content and software applications for current and emerging digital platforms.
Valerie has taken part in foreign trade missions and is regularly called upon to present the CMF model internationally.

Valerie was invested into the Saskatchewan Order of Merit in 2016 and the Order of Canada in 2019. She was named one of 2016's 20 most powerful women in global television by *The Hollywood Reporter*, was recognized in 2017 by Women in Television and Film – Vancouver for her major contribution to promoting gender equality in media, and was bestowed the Honorary Maverick Award at the 2017 Female Eye Film Festival. Most recently, she received C21's 2020 Content Canada Impact Award.

Valerie holds a Bachelor of Fine Arts from the University of Saskatchewan, has served on a variety of regional, national, and international juries and boards and has produced radio dramas for the CBC in Saskatchewan, where she owns and operates the Red Horse Ranch.

## SANDRA COLLINS

#### **CHIEF OPERATING OFFICER**

Sandra Collins has over 20 years' experience in the film and television industry. Since joining the CMF in 2007, she has been responsible for finance, legal, human resources, information technology, risk management and administration, as well as research and data. As COO, she now contributes to the oversight of all the corporation's operations.

Previously, Sandra held various senior positions at Alliance Atlantis Communications, including Senior Vice President, Finance, Entertainment Group, and Vice President, Systems Integration, Corporate Group.

Sandra is a Certified Management Accountant and holds an HBComm from the University of Windsor and a BA from the University of Western Ontario.

# **KELLY WILHELM**

#### **CHIEF STRATEGY OFFICER**

Kelly Wilhelm is a bilingual strategist with over 20 years' experience leading innovation, growth and change in Canada's creative industries. She has led major strategy and policy initiatives to respond to disruption, address systemic inequities and secure new investments in arts and culture.

In her role at CMF, Kelly charts the future trajectory of the organization with a focus on strategies for growth and innovation. She also leads the CMF's major policy initiatives, including support for Indigenous and racialized creators, and drives the organization's stakeholder and government relations at the most senior level. Before joining the CMF, Kelly worked as

an independent strategist, advising executive teams at Banff Centre for Arts and Creativity, the National Arts Centre, City of Toronto Economic Development and Culture, and the National Gallery of Canada. She served as Senior Policy Advisor to the Minister of Canadian Heritage on complex files in television, digital media, broadcasting, film and news media. Prior to that, Kelly was Director of Policy, Planning and Strategic Foresight at the Canada Council for the Arts.

Kelly holds a Bachelor of Arts in Literature and Art History from Queen's University, and a Master of Arts degree in Museum Studies from the University of Toronto.

# CANADA MEDIA FUN

## NATHALIE CLERMONT

## VP, PROGRAMS AND BUSINESS DEVELOPMENT

Nathalie Clermont has been working in the film, television and digital media industry for more than 30 years, with extensive experience in policy development and financing. Since joining the organization in 2007, she has been a key advisor on CMF policies and programs. She also ensures consistency in service standards and application processes for all CMF programs, with a focus on developing alternative funding partnerships to leverage CMF investments.

Prior to joining the CMF in March 2007 as
Director of Program Management, Nathalie spent
15 years at the Société de développement des
entreprises culturelles (SODEC), where she was
the team leader of the Business Affairs Unit,
responsible for equity investment programs in
cinema and television.

Nathalie holds a BA in Film, Communications, and Public Relations from the Université de Montréal.

## MATHIEU CHANTELOIS

#### **VP, COMMUNICATIONS AND PROMOTION**

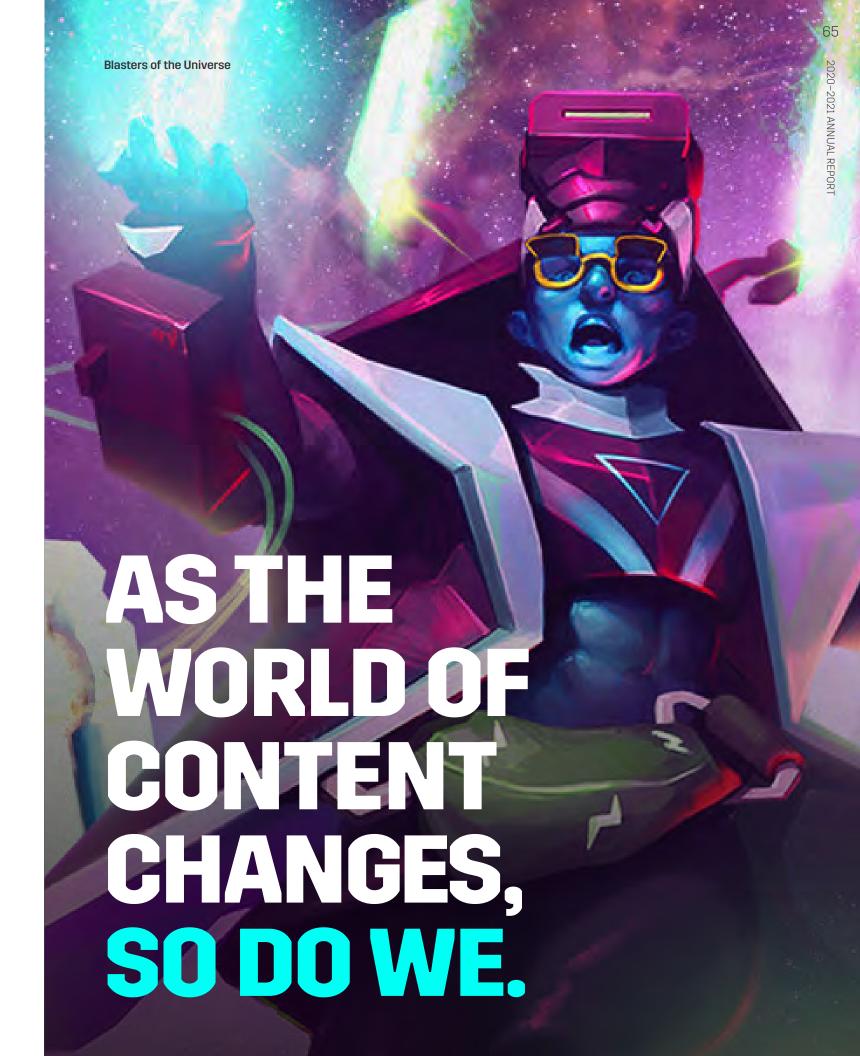
A Montreal native, Mathieu Chantelois moved to Toronto in 2000 to be a cast member on *U8TV: The Lofters*, Canada's first reality TV show. He frequently appears on Radio-Canada, covering a wide range of social, cultural and political affairs, and he has published over a thousand stories in French and English entertainment magazines.

For more than 20 years, he has cultivated connections with stakeholders in the entertainment industry, first as a reporter and then as an executive at Cineplex Media.

As a volunteer, he raised substantial funds for

the Canadian Foundation for AIDS Research (CANFAR), The 519 Community Centre, and the Museum of Contemporary Art Toronto (MOCA). He's now the co-chair of Cinéfranco, Toronto's French movie festival.

Mathieu has a BA in Communications from l'Université du Québec à Montréal and a Master's Degree in Journalism from Carleton University in Ottawa. He recently completed a Certificate in Strategic Perspective in Non-profit Management from Harvard Business School.



# INDUSTRY CONSULTATIONS

From March 11 to April 9, 2021, the Canada Media Fund's 2021 consultations straddled the end of the 2020–2021 fiscal year and the beginning of 2021–2022.

A total of 988 screen industry professionals contributed, including creators, producers, associations, unions, guilds, provincial and territorial funders, broadcasters, distributors, next-generation creators, and stakeholders from Indigenous, Black and racialized communities from across Canada. The CMF held 17 virtual roundtables and four virtual town halls, and received 181 written submissions.

Meetings were attended by CMF executives and Board Directors, as well as representatives from the Department of Canadian Heritage.

In June 2021, the CMF released the *Spark*Courage: What We Heard report summarizing the input received during the consultations.

The feedback the CMF received through the consultation will inform its work on a new program model. The CMF will continue to work with government and consult key industry partners as it develops specific aspects of this model. It is expected that changes will begin in 2022, with full implementation of the new model taking place over a minimum of two years.



# STRATEGIC ACTIONS AND RESEARCH

The Canada Media Fund monitors industry trends and developments to provide stakeholders with forward-looking analyses of the evolution of the television and digital media marketplace to adequately respond to disruption in the industry.

Additional research was conducted in 2020-2021 to understand the impact of the pandemic and of the CMF-administered COVID emergency relief funding on the industry (including with underserved and equity-seeking groups). The CMF developed new tools to ensure that the industry was informed of opportunities for support, along with key trends and developments during the pandemic.

The Now & Next online hub provides:

- Articles written by the CMF Industry and Market Trends team, as well as by collaborators and experts based in Canada and internationally.
- Research reports, including our annual report on industry trends, providing insight into the challenges facing and opportunities available to Canadian producers and creators. This year's Key Trends Report focused on the impact and industry response to the pandemic.
- · Industry data on Canadian media consumption patterns and major global trends with charts, tables and timelines.
- · A podcast series, in French and English, featuring leading experts.

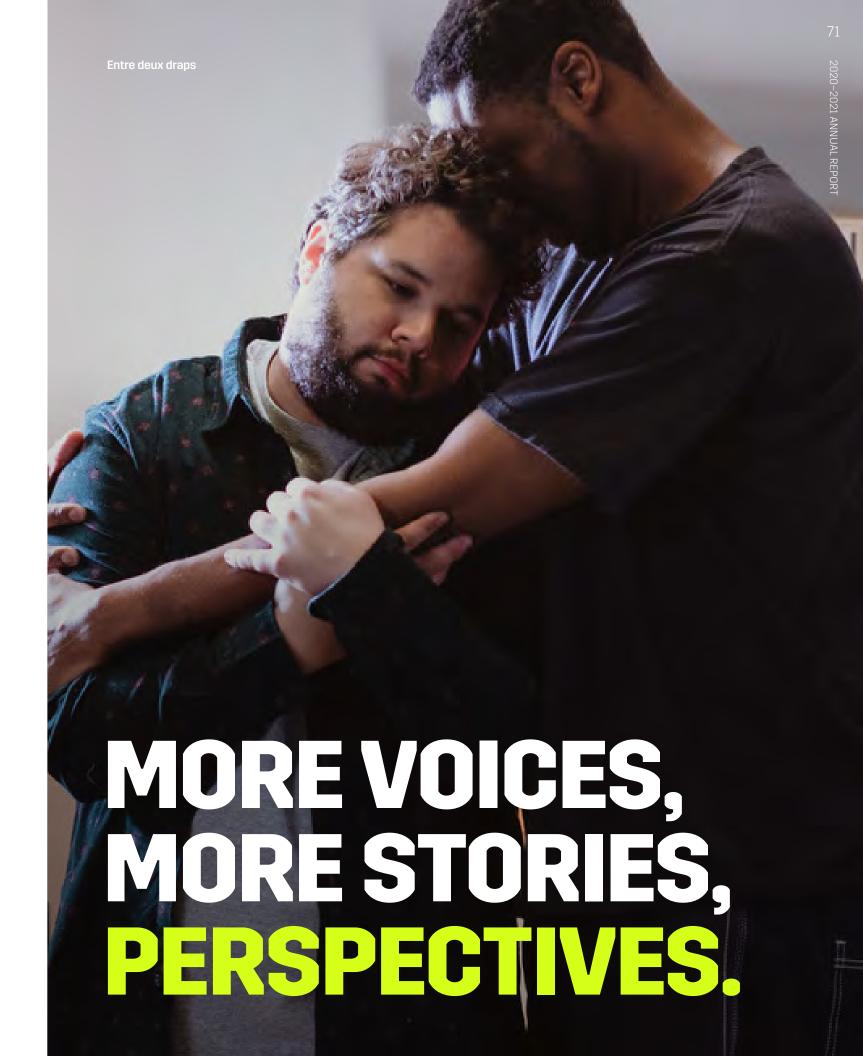
Some highlights from 2020-2021:

- A total of 73 articles published on Now & Next/Futur et médias in Fiscal 2020-2021, generating over 175,000 page views.
- · A second season for our French-language podcast series, Futur et médias, which featured six interviews about current and future challenges for the screen industries. Over 9,500 listens for Futur et médias so far.
- A third season for our English-language podcast series, Now & Next, which featured eight interviews about current and future challenges for the screen industries. Over 17.000 listens for Now & Next so far.

- Bilingual COVID online hub for the Canadian screen industries with key news and information about the pandemic (launched April 2020, 21,498 page views as of July 9, 2021: 15,904 in English, 5,594 in French).
- Bilingual directory of COVID assistance programs available to Canadian companies and workers in the screen industries in all regions of the country (launched April 2020, accessed 10,351 times as of July 9, 2021: 7,743 in English, 2,608 in French).
- Special edition of the CMF's annual Trends
  Report focusing on the pandemic, its impact
  and potential long-term effects (launched
  February 2020, viewed 12,823 times as of
  July 9, 2021: 8,728 in English, 4,095 in French).
- Cross-country survey of Canadian production companies in the film, television and interactive digital media industries to monitor the ongoing impacts of the pandemic, in collaboration with national, provincial and territorial industry associations and funders (five survey waves in English and French between August 2020 and February 2021).
- Survey of recipients of the COVID-19 CMF
   Emergency Relief Funds Allocation for
   companies owned by Black People and
   People of Colour (IPSOS) to better understand
   the situation of racialized media producers.
- Funding and support of pandemic-related research led by industry partners including the Canadian Media Producers Association (CMPA), the Women in Film & Television (WIFT) Canada Coalition, WIFT-Alberta, DigiBC and the Game Arts International Network (GAIN).

Evidence-based decision-making is essential for the CMF and other industry organizations as media consumption patterns change during this period of intense disruption due to the pandemic. The CMF's Equity and Inclusion strategy, developed following extensive consultation with racialized and other under-represented communities, clearly shows the need for additional datasets to support policy and program decisions. The CMF continues to work in partnership to invest in new datasets and methodologies to deal with these shared challenges. Examples of these collaborations include:

- The convening of an ongoing roundtable working group on Equity and Inclusion in Data Collection with representatives of 35 federal and provincial agencies, private funders and producers, and equity-seeking organizations. Its purpose is to develop common terminology and definitions to research and benchmark under-representation, thereby assisting policy-makers in addressing gaps and challenges faced by these communities in screen-based industries.
- Working with Adobe Analytics to develop a new Digital Measurement Infrastructure to replace CMF's legacy tagging system created in 2011. Moving beyond basic metrics such as time spent and number of views, this new implementation will better assess impact using a combination of consumption, sales and social media ratings data to better understand all aspects of online users' experiences.
- A joint licence between the CMF and the CRTC for Parrot Analytics to measure engagement, international success and onscreen diversity of long-form content across linear and nonlinear platforms.



## INDUSTRY PARTNERSHIPS

The Canada Media Fund partnered with industry leaders to present events in 2020–2021. These partnerships are valuable opportunities for the CMF to gauge the current state of the industry, inspire new ideas, foster industry innovation, and promote Canadian content and talent.

Its partnership strategy focuses on building stakeholder relations, gathering and disseminating industry intelligence, promoting successful content, developing business opportunities for producers to support coproduction, and communicating key messages to the industry.

The CMF applies a partnership evaluation frame of reference to take into account current and future objectives, as well as to evaluate the return on investment of its partnership program.

All Access Manitoba Kidscreen

Available Light Film Festival Meet the Series/Meet the Docs

Banff World Media Festival MEGAMIGS

Calgary International Film Festival MIPCOM

Canadian National Film Day (Encore+) MIPDoc

Canadian Screen Awards MIPJunior

CARLA (WIFT-I) MIPTV

Centre PHI – Venice VR Expanded Ottawa International Animation Festival

Congrès AQPM Prime Time

Content Canada Prix Gémeaux

Content London PRIX NUMIX

Directors Guild of Canada Awards Quebec Cinéma Gala

Diversity of Voices program Quebec Cinéma RDVPro

Femmes du cinéma, de la télévision et des Reelworld Film Festival

médias numériques

Rencontres Internationales du Documentaire

Festival du nouveau cinéma – FNC Explore de Montréal

Festival International du Film pour Enfants

de Montréal

Screen Nova Scotia Forum

SODEC – Atelier Grand Nord RV

FIN Atlantic International Film Festival
St. John's International Women's Film Festival

Forest City Film Festival

Toronto Black Film Festival

GamePlaySpace Toronto Queer Film Festival

Gimli Film Festival
T.O. WebFest

Good Pitch

Vancouver Asian Film Festival

Halifax Black Film Festival

Vancouver International Film Festival

Hot Docs

Vancouver International South Asian

HUB Montréal Film Festival

imagineNATIVE Whistler Film Festival

Indigenous Film Summit Yorkton Film Festival

Interactive Ontario Youth Media Alliance - Conference

International Film Festival of Ottawa Youth Media Alliance - Gala

# CANADA MEDIA FUND

## PROMOTION

We believe that every voice is a spark – and with a little help, even the smallest spark can move us.

This is why we collaborate with the industry and the creators of the content we fund to promote the exceptional work of Canada's creators, both here at home and around the world.

In 2020, the CMF launched a new brand identity that showed our commitment to making sure all voices representing our country have a chance to rise up and be heard. Our new look also signals a turning point in our organization as we embrace change and work hard to ensure that all Canadians see themselves reflected in the content we fund. With the ability to scale across multiple platforms and programs, our bold new identity embodies innovation, inclusivity and the fire that ignites us.

The rebrand was driven in part by the Truth and Reconciliation Commission of Canada's final report and their Call to Action 84, which requested entities participating in Canada's media landscape to "be properly reflective of the diverse cultures, languages and perspectives of Aboriginal peoples." To date, the CMF's new logo has been adapted to 14 Indigenous languages and dialects, representing CMF-funded content in each of those languages.

This fiscal year also marked a big celebration as the CMF turned 10. Focusing on how we support creators, spark change and champion courageous storytelling, we secured coverage with consumer-focused press, including CBC News, CP24, BNN Bloomberg and local radio shows, as well as Canadian media outlets in Arabic, Hindu, Punjabi and Urdu. In French, during the 35th Prix Gémeaux, the CMF's 10-year anniversary spot was introduced by host Véronique Cloutier and played in-show during the live gala broadcast on Radio-Canada, reaching close to a million viewers.

The CMF returned as a founding partner of Content Canada's Digital Summit, where it presented a panel on equity. Valerie Creighton accepted Content Canada's Inaugural Impact Award, presented by Karine Vanasse.

As the lead sponsor of the imagine NATIVE Film
+ Media Arts Festival and co-sponsor of their
Industry Days, the CMF actively participated
and was highly visible throughout the festival.
Canadian Indigenous content also reached
international audiences at Content London with
a sponsored showcase of three CMF-funded
Indigenous dramatic series.

#### MADE | NOUS

When the pandemic hit, MADE | NOUS quickly shifted its strategy to reach people in new ways. We collaborated with ambassadors Jay Baruchel and Marc-André Grondin to create a month-long social media road trip celebrating Canadian content. This was followed by 18 free drive-in screenings of Canadian films, reaching audiences from PEI to British Columbia to the Yukon, and generating over 3M earned media hits from local and national outlets, including Toronto Life, CBC Here and Now, Qui Fait Quoi, a national segment on Breakfast Television, and many others.

A new and improved website as well as a second commercial spot for MADE | NOUS were launched in 2020–2021, followed by our new ad campaign "Seek More" that has diversity and inclusion at its core.

#### **ENCORE+**

Encore+ continued to grow in popularity across 2020–2021, receiving a Silver Creator Award from YouTube Canada for hitting 100,000 subscribers. Channel subscriptions and viewership continue to see strong and consistent gains, with over 70% of viewers from outside Canada. At the end of the fiscal year, the channel had over 130,000 subscribers and the content had over 35M views.

# CANADA MEDIA ELIND

## EQUITY AND INCLUSION



In 2020-2021, the CMF made a commitment to implement significant and lasting changes over the next two years to dismantle systemic racism and barriers to access for equity-seeking and sovereignty-seeking communities. It developed and launched a three-year Equity and Inclusion Strategy after extensive consultations with these communities.

In the last year, the CMF delivered several results related to its Equity and Inclusion Strategy, including:

#### **Programs:**

- In 2020–2021, the CMF developed the following changes to its 2021–2022 programs to support projects by production companies owned and controlled by Indigenous people, Black people or people of colour:
- Performance Envelope Factor, which rewards broadcasters that license projects from production companies owned/controlled by racialized persons.
- \$10.5M Pilot Program for Racialized Communities.
- Updates to evaluation grid points in the majority of selective Convergent and Experimental Stream Programs to award additional points to companies owned/controlled by racialized persons.
- 25% carve-out of the Conceptualization,
   Predevelopment and Early-Stage
   Development Programs for production
   companies owned/controlled by racialized persons.
- In 2020, the CMF provided over \$1M in funding to 19 organizations owned and controlled by Black people and people of colour for projects that result in benefits for multiple screenbased creators and companies in Canada.

#### **Consultation:**

- The CMF convened and consulted with a group of Black industry leaders in both English and French. Additionally, the CMF consulted with producers who are people of colour in both the French and English markets. These consultations informed the development of the Equity and Inclusion Strategy and the disbursement of COVID relief funding to these communities.
- As part of the CMF's national consultation in March of 2021, we conducted outreach and targeted invitations to ensure that members of equity- and sovereigntyseeking communities were included in all discussions, as well as providing a safe space for community-specific consultations.

#### Research and Data:

 In 2020–2021, the CMF led the EIDC Round Table Working Group, which developed a Terminology Guide for Data Collection on Racialized and Indigenous Communities.

#### **Communications:**

- Developed through 2020–2021, the "Seek More" campaign encourages more onscreen diversity and representation.
- New partnership strategy to focus on festivals and events that target racialized and under-represented communities.



## **AUDIENCE RESULTS: TELEVISION**

While funding results in this annual report illustrate activities in the 2020-2021 fiscal year, audience results reflect the most recently completed broadcast year, specifically 2019-2020.

Viewing reported in this section is derived from Numeris measuring primarily long-form content on linear platforms. Consumption not currently measured includes viewing of VOD/ SVOD, streaming or over-the-top (OTT) services, or long-form programming available on internetnative MCNs such as YouTube. The CMF has engaged with other third-party data providers, including Adobe Analytics and Tubular Labs, to build out future reporting capacity in these areas, and is also awaiting the rollout of Numeris' Video Audience Measurement (VAM) panel that, while still in its development phase, proposes to measure content consumption across broadcaster-branded apps and other non-linear platforms.

This year's Annual Report incorporates Numeris' On-Demand Measurement (ODM) which tracks consumption of video content available through set-top box VOD services or broadcaster websites. While ODM only accounts for approximately 1% of total aggregate tuning in 2019-2020, this additional dataset begins to account for a small portion of the more than 30% of consumption that is said to be unmeasured.2

#### **Overall English-Language Viewing Trends**

#### Canadian vs. foreign programs

Domestically produced programs accounted for 35% of full-day viewing in English-language television, up one percentage point from the previous year. During peak viewing hours, 31% of English-language television viewing was devoted to Canadian programming, consistent with the previous year.

Total tuning to all linear television, both Canadian and foreign, decreased by 1% in 2019-2020, driven primarily by a substantial decrease in foreign linear viewing. Viewers turned to domestic sources for news on the-then rapidly evolving COVID-19 pandemic and migrated to other non-measured content (SVOD, OTT, video game platforms) as sources for entertainment during the initial phases of lockdown.

The shares of both full-day and peak hour viewing of Canadian programs have trended downwards since 2014-2015. However, in 2019-2020, the share of full-day viewing rebounded by one percentage point to match the levels seen in 2017-2018. A substantial increase in viewing of domestic news during the pandemic contributed to the increase in overall viewing observed here.

#### CMF-funded genres vs. other genres (Canadian and foreign programs combined)

Overall viewing of English-language programs, both domestic and foreign-produced, in the four CMF-supported genres (Children's & Youth, Documentary, Drama, and Variety & Performing Arts) decreased by one percentage point to a 40% share for full-day.

In peak hours, viewing of CMF-supported genres grew to 42%, up one point compared to the previous year. Each of the supported genres remained the same year over year except for Documentary, up one percentage point to 7% in 2019-2020, likely due to cable news viewing during the COVID crisis.

<sup>&</sup>lt;sup>1</sup> http://assets.numeris.ca/DNAInsights/On%20Demand%20Measurement%20DNA%20newsletter.pdf

<sup>&</sup>lt;sup>2</sup> 2019 Canadian Media Usage Study (CMUST), iab Canada/phd Canada, November 2019.

#### CMF-funded programs vs. non-funded Canadian programs

When examining full-day viewing of Canadian programs in only the CMF-supported genres, share of CMF-funded programs was 36%, a decrease of five percentage points from the year previous and a five-year low. In peak viewing hours, CMF-funded programs showed a fourpoint drop in share from the previous year to 45%, the lowest share in 10 years. Some of the declines posted in full-day can be attributed to an increase in morning news programs during the start of the COVID pandemic, which have been classified by Numeris as "Analysis and Interpretation" (equivalent to Documentary programming in CMF genres). Peak hour declines

can be attributed to a significant increase in non-funded pandemic-related news and current affairs programming classified as Documentary.

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In 2019-2020, ODM tuning increased by some 39% from the previous year, but its limited reach only translated into a very small increase in aggregate total hours tuned. Meanwhile, linear tuning to CMF-financed projects declined by 15% from the year previous, for a net year-over-year decline of 14% in tuning to CMF-financed English-language content. This is an all-time low driven by declines in viewing of CMF-funded Documentary, Children's & Youth, and Drama programming.

#### **Overall Viewing of English-Language Programs** in CMF-Supported Genres (CMF vs. Other Canadian vs. Foreign)

In Children's & Youth, the share of full-day viewing of CMF-funded programs rose by one share point to 24%, while viewing of non-CMF Canadian programs increased by four share points to 15%. In peak hours, viewing of CMFfunded programs rose by eight share points to 30%. This genre is one of the most susceptible to changing consumption patterns due to new technologies, with children's content readily accessible on alternate platforms, including tablets and OTT services that are favoured by younger consumers. As such, share trends are often quite volatile and sometimes difficult to discern. What is clear, however, is that overall consumption of children's content continues to decline significantly on linear services.

In Documentary, the share of full-day viewing of CMF-funded content decreased by four share points to 19%. In peak hours, viewing levels of CMF-funded Documentary content declined by three points to 21%, while viewing of foreign Documentary content rose by two points to 54%. CMF-funded Documentary posted a 15% decline in aggregate total hours tuned for fullday viewing, and a 4% decline in tuning during peak viewing hours. Much of the full-day decline was likely driven by an increase in COVID-related Analysis and Interpretation programs, which displaced viewing and airings of CMF-funded "traditional" documentary programs.

In Drama, the full-day share of viewing of CMFfunded content declined by one share point to 5%, while shares of non-CMF-funded Canadian content rose by two percentage points to 13%. Shares of viewing in peak hours of CMF-financed projects remained at 6%, maintaining a five-year low from the previous year. Viewing of non-CMF drama during peak hours, however, rose by

two points to 9%, its highest in five years. This may be partially attributed to catch-up viewing occurring during COVID-19 stay-at-home orders.

In Variety & Performing Arts, the share of full-day viewing of CMF-funded content increased by one share point to 17%. In peak viewing hours, CMF-funded content also rose by one point to a 14% share, which marks a three-year high. This lift is due to the increase in the number of airings of the successful CBC VAPA series Still Standing and the return of Battle of the Blades. Non-CMFfunded Canadian content rose to 5% for both full-day and peak hour viewing. Despite these gains, there is relatively little content in this genre compared to Children's & Youth, Drama and Documentary; therefore, these shifts do not typically affect the overall aggregate share of viewing of CMF content.



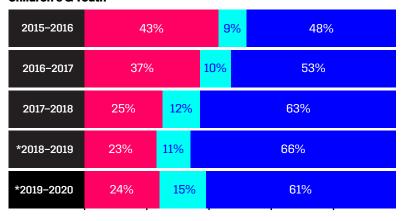
Full Day - English (\*including ODM)

CMF-funded

Non-CMF-funded
Canadian

Foreign

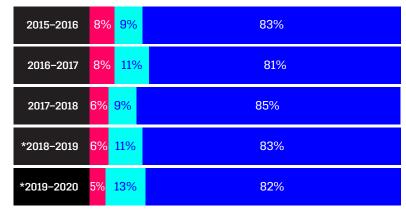




#### **Documentary**



#### Drama



#### **Variety & Performing Arts**

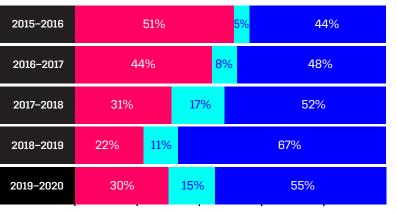


#### CMF-Funded vs. Non-CMF-Funded Canadian vs. Foreign Programs by Genre

#### Peak Hours – English



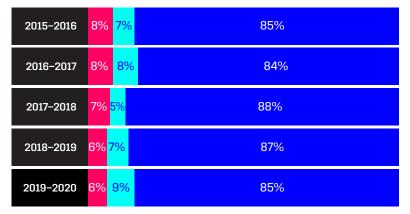
#### Children's & Youth



#### **Documentary**



#### Drama



#### **Variety & Performing Arts**



## **Top-Performing CMF-Funded English-Language Programs**

The following is a list of the Top 10 Englishlanguage programs funded by the CMF and aired during the 2019–2020 broadcast year.

Five CMF-funded programs airing in the 2019–2020 broadcast year achieved average audiences of over 1 million viewers. This is consistent with 2018–2019 and is one less than in 2017–2018. However, this is still an improvement over the 2016–2017 year, when only three projects surpassed the 1 million threshold. Eight of the Top 10 programs were from the Drama genre, achieving audiences that ranged from just 693,000 to 1.8 million viewers. Two Variety & Performing Arts programs ranging in audience from 712,000 to 1.6 million viewers also made the Top 10 list.

The top-performing CMF-funded English-language program, CTV's *Transplant*, averaged over 1.8 million viewers for its 13-episode run.

Next was the CBC program *Canada's New Year's Eve: Countdown to 2020* at over 1.6 million, followed by Global's *Nurses* at almost 1.2 million.

The top domestic program overall was the *CFL Grey Cup* at almost 3.7 million, while the top-performing Canadian program in a CMF Genre was the COVID relief special *Stronger Together*, *Tous Ensemble* with an audience of 3.2 million simulcast across multiple networks.

By way of comparison, the top-performing foreign program in a CMF-supported genre, *The Good Doctor*, attracted an audience of 2.6 million viewers, while five other drama series (*Grey's Anatomy*, *9-1-1*, *Station 19*, *9-1-1*: *Lone Star* and *New Amsterdam*) delivered over 2 million viewers on average.<sup>3</sup>

<sup>3</sup> Includes ODM viewing.



#### Top 10 List of CMF-Funded Programs English-Language Broadcasters

Rank	Broadcaster	Program Title	Day	Time	CMF Genre	Number of Telecasts	Viewers Age 2+ Average Minute Audience (000)
1	CTV	Transplant	Wednesday	9:00 pm-10:00 pm	Drama	13	1,839
2	CBC	Canada's New Year's Eve: Countdown to 2020	Tuesday	11:00 pm-12:10 am	Variety & Performing Arts	1	1,633
3	Global	Nurses	Monday	8:00 pm-9:00 pm	Drama	10	1,185
4	CTV	Cardinal	Monday	10:00 pm-11:00 pm	Drama	6	1,178
5	CBC	Murdoch Mysteries	Monday	8:00 pm-9:00 pm	Drama	18	1,019
6	CBC	Coroner	Monday	9:00 pm-10:00 pm	Drama	8	924
7	CBC	Schitt's Creek	Tuesday	9:00 pm-9:30 pm	Drama	14	918
8	CBC	Kim's Convenience	Tuesday	8:00 pm-8:30 pm	Drama	13	773
9	CBC	Still Standing	Tuesday	8:00 pm-8:30 pm	Variety & Performing Arts	13	712
10	CBC	Frankie Drake Mysteries	Monday	9:00 pm-10:00 pm	Drama	10	693

Source: CMF Media Analytics (Numeris) 2018–2019 Broadcast Year, Original Airings Only + On-Demand Measurement.



## Overall French-Language Viewing Trends

#### Canadian vs. foreign programs

Canadian programs continued to account for most of the viewing in the French-language market with a 64% share of full-day viewing, up five percentage points from the previous year. In peak hours, the share of viewing of Canadian programs in 2019–2020 rose by five share points to 65%, a 10-year high.

There was a 5% increase in total viewing in 2019–2020 compared to the previous year, driven by consistent increases in consumption of Canadian content since 2017–2018. ODM viewing in the French market is still lower than in the English market, with less than 0.6% of overall total hours tuned originating from ODM consumption.

### CMF-funded genres vs. other genres (Canadian and foreign programs combined)

Share of viewing of CMF-supported genres in the French-language market remained unchanged at 40% for full-day and 45% for peak hour viewing. During peak hours, no individual CMF-supported genre has shifted by more than a percentage point since the 2014–2015 broadcast year. In 2019–2020 during full-day, the Documentary genre posted a two-point increase to 12%, while viewing of Children's & Youth content declined to 2%, its lowest share in five years.

### CMF-funded programs vs. non-funded Canadian programs only

When examining viewership of Canadian content in CMF-supported genres, in 2019–2020 CMF-funded content captured a 58% share of full-day viewing, decreasing one share point from last year. In peak hour viewing, CMF-funded content captured a 71% share, reverting to the levels

observed in 2017-2018. This was likely due to an increase in consumption of non-CMF Analysis and Interpretation programming concerning the COVID pandemic.

#### Overall Viewing of French-Language Programs in CMF-Supported Genres (CMF vs. Other Canadian vs. Foreign)

For French-language content in CMF-supported genres, there was an increase of one share point from last year to 33%, another record high during full-day. These gains came at the expense of foreign content which experienced a two-point drop from last year. During peak hours, the share of viewing of CMF-financed projects was unchanged from last year, while non-CMF Canadian projects increased by two share points to 20%, likely driven by stay-at-home pandemic viewing. Foreign projects recorded its lowest share at 31%, two percentage points lower than the previous year.

In Children's & Youth, the share of full-day viewing of CMF-funded content rose by 16 percentage points to 60%, while foreign programs decreased by 15 percentage points from last year to 33%. A similar rise was seen in peak viewing hours, where the share of CMF-funded Children's & Youth programs increased by 16 points to 67%, recovering from the substantial decrease from the prior year and marking its largest growth in five years. This increase can generally be attributed in part to the year-to-year volatility of the genre, due to how the target market is calculated.4 These figures notwithstanding, there has been a continual decline in aggregate viewing of Children's & Youth content on linear platforms since 2014-2015.

In Documentary, full-day share viewing of CMF-funded content grew by three points from the previous year to 26%, while peak viewing of CMF-funded content increased by seven points to 33%. Most of this increase in peak hours was driven by a substantial increase in hours of CMF-financed content aired, rather than increases in average audience per airing. Foreign Documentaries in peak hours fell to 19%, its lowest share since the CMF began tracking this data in 2005–2006.

In Drama, full-day viewing of CMF-funded programs remained stable at 27%. During peak hours, the share of viewing of CMF-funded Dramas decreased by one point to 46% after reaching a record high the previous year. Viewing of foreign-produced Dramas in peak hours fell by two points, while viewing of Canadian non-CMF-funded projects rose by three points to 11%. Pandemic consumption patterns contributed to an increase in viewing of individual projects for Canadian-funded Dramas in peak viewing hours.

In Variety & Performing Arts, full-day viewing of CMF-funded programs gained three share points to 91%, driven in part by popular new and returning performance reality series (*Révolution* and *La Voix*). Peak-hour viewing of CMF-financed content grew by two points to 91%. These gains were at the expense of non-CMF-supported Canadian programs in this genre. Foreign VAPA accounted for only 1% of viewing in both overall and peak-hour viewing.

<sup>&</sup>lt;sup>4</sup> Non-CMF-financed Children's & Youth projects are categorized by audience composition (more than 50% of the audience being under the age of 18). The calculation is undertaken in each broadcast year and, as such, there may be some movement in and out of the category, causing some volatility in audience calculations.

Full Day – French (\*including ODM)

CMF-funded

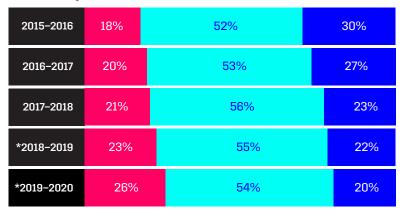
Non-CMF-funded
Canadian

Foreign





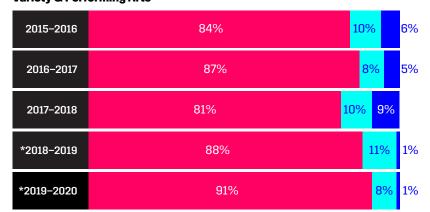
#### **Documentary**



#### Drama

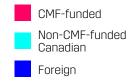


#### **Variety & Performing Arts**

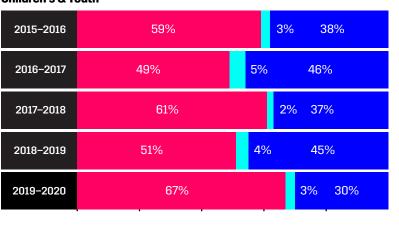


#### CMF-Funded vs. Non-CMF-Funded Canadian vs. Foreign Programs by Genre

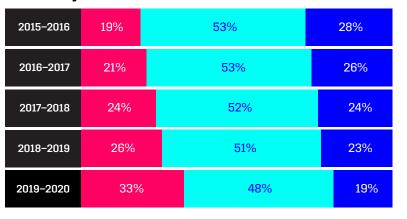
#### Peak Hours – French



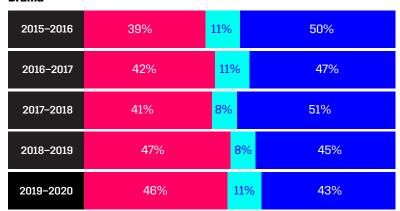
#### Children's & Youth



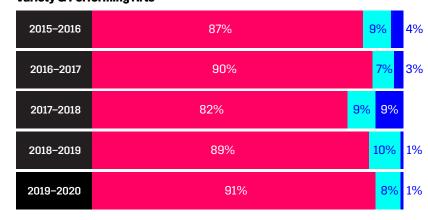
#### **Documentary**



#### Drama



#### **Variety & Performing Arts**



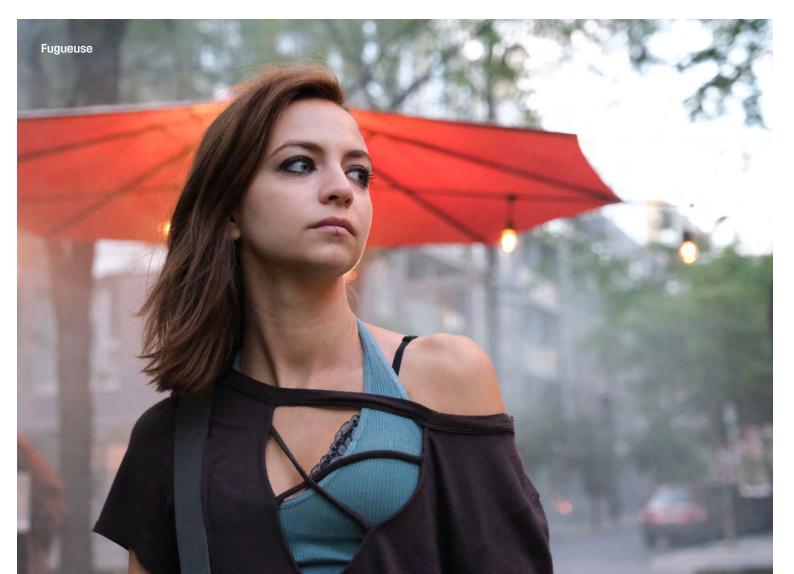
## **Top-Performing CMF-funded French-Language Programs**

The following is a list of the Top 10 Frenchlanguage programs funded by the CMF that aired during the 2019–2020 broadcast year.

All titles on the Top 10 list achieved audiences of more than 1 million viewers. A further 15 titles also met this criterion, bringing the number of CMF French-language programs with over 1 million viewers to 25 in total. Continuing the trend for the past few years, *Bye bye 2019* was the top overall program in 2019–2020, with 4.5 million views. On-Demand viewing added, on average, 2% to audiences for CMF-financed projects.

Six of the Top 10 programs were from the Variety & Performing Arts genre, achieving audiences that ranged from 1.6 to 4.5 million viewers. The remaining four programs on the Top 10 list were Drama projects, with audiences that ranged from 1.6 to 2.0 million viewers. No programs from either Documentary or Children's & Youth genres made the Top 10 list.

The top-performing CMF-funded French-language project, *Bye bye 2019*, was watched by over 4.5 million viewers, while the top-performing series, *La Voix*, was watched by over 2 million viewers, even though almost one-third of its season was cut short because of mandated production shutdowns due to the COVID-19 pandemic. In terms of Drama, the top-performing program was *Fugueuse*, with an average audience of nearly 2 million over its 10-episode run.



## **Top 10 List of CMF-funded Programs French-language Broadcasters**

Rank	Broadcaster	Program Title	Day	Time	CMF Genre	Number of Telecasts	Viewers Age 2+ Average Minute Audience (000)
1	SRC	Bye bye 2019	Tuesday	11:00 pm-12:17 am	Variety & Performing Arts	1	4,540
2	SRC	Infoman NYE Special	Tuesday	10:00 pm-11:00 pm	Variety & Performing Arts	1	2,705
3	TVA	La Voix	Sunday	7:00 pm-9:18 pm	Variety & Performing Arts	8	2,176
4	TVA	Fugueuse	Monday	9:00 pm-10:00 pm	Drama	10	1,989
5	TVA	ARTIS, LE GALA	Sunday	8:00 pm-10:43 pm	Variety & Performing Arts	1	1,933
6	SRC	District 31	Monday- Thursday	7:00 pm-7:30 pm	Drama	112	1,833
7	TVA	ALERTE AMBER	Monday	9:00 pm-10:00 pm	Drama	10	1,779
8	SRC	En direct de l'univers NYE	Tuesday	7:00 pm-8:30 pm	Variety & Performing Arts	1	1,770
9	TVA	ÉPIDÉMIE	Tuesday	9:00 pm–10:00 pm	Drama	10	1,647
10	SRC	La fureur	Saturday	9:00 pm–10:35 pm	Variety & Performing Arts	1	1,611

 $Source: CMF\ Media\ Analytics\ (Numeris)\ 2018-2019\ Broadcast\ Year, Original\ Airings\ Only\ +\ On-Demand\ Measurement.$ 

## AUDIENCE **RESULTS:** DIGITAL MEDIA

#### **Usage Data For Digital Content** From Platforms Other Than **Television**

Since the inception of the CMF in 2010, all rich and substantial digital media projects funded in the production program of both the Convergent and Experimental Streams were required to report on audience reach and consumption metrics at regular intervals. However, within the Convergent Stream, the distinction of "Value-Added" projects was introduced in the 2016-2017 funding year, and these projects, with digital media budgets of less than \$100,000 in English or \$50,000 in French, were exempt from installing a CMF digital tracking code. The consumption derived from Value-Added projects has been blended within the performance evaluation of the current Convergent Stream. Value-Added projects are outside of the scope of this report.

Subsequently, all Convergent projects financed after April 1, 2019 are now considered Value-Added projects, and only Experimental production projects are required to fulfill this tagging requirement. The contractual obligation to report audience data to the CMF remains in place for all rich and substantial production projects in Convergent and Experimental Streams financed prior to April 1, 2019. These digital projects in the Convergent Stream will continue to report as part of their compliance requirements, although this will be phased out over the next few years as projects reach the end of their life cycles.

#### **Evolving CMF's Measurement Capabilities**

With the rapid technological growth seen in the design and distribution of digital projects in recent years, the CMF is working towards the release of a new Digital Measurement Infrastructure (DMI), which will replace the

existing Digital Media Measurement Framework (DMMF) that was originally designed in 2010. This modernized framework will expand the CMF's ability to measure digital media content found on the internet and to implement more strategic KPIs.

To develop this framework, the CMF has determined that it is necessary to move away from a single-source analytics provider approach for two reasons: because content is distributed online and offline through many different platforms, no single analytics provider is able to measure consumption across the entire digital landscape. Therefore, content distributed over the internet is not measured by any one trusted third-party data measurement company with a standard measurement currency. Companies such as CMF's data providers Adobe Analytics and Tubular Labs, which collect both first- and third-party data, have built their businesses based on having direct access to creator's back-end datasets. Adobe Analytics can provide access to data derived from all CMF projects tagged directly, and Tubular Labs to the more difficult-to-access data that is stored by YouTube and Twitch, as well as social sites such as Twitter, Facebook and Instagram.

The CMF has also aligned with Steam, a video game digital distribution service by Valve Corporation, to access the back-end usage data and revenue reports of CMF-funded games on Steam, provided the CMF applicant approves the necessary permissions. The development of an implementation guide for applicants is currently underway. In partnership with Telefilm, the CMF has also developed a self-reporting tool that allows the remaining clients access to their respective data, providing metrics directly into Dialogue, Telefilm's records management tool for CMF clients. This suite of measurement tools will be adapted to align with any changes to the overall CMF Program Model which is currently under review.

#### **Usage Data For Digital Content**

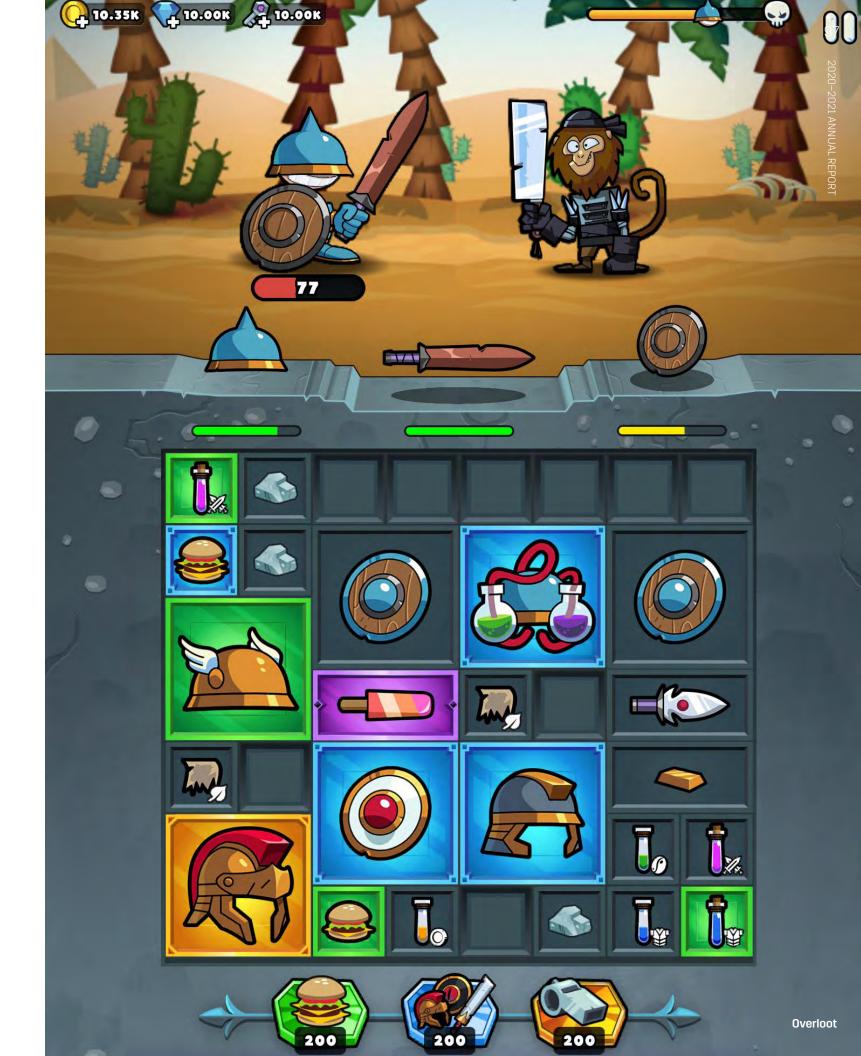
The following tables report digital media (DM) usage for all projects reporting in the 2020 –2021 fiscal year. The metrics identified in this report are as follows: total visits, total unique visitors, within each language and content type. The reporting period uses data from Adobe Analytics (April 1, 2020–March 31, 2021).

### Convergent Stream – Production (Funded)

There are currently 521 distinct projects tagged and reporting data within Adobe Analytics. The exhibition of these projects is cyclical in nature and generally the launch to market is within two years of receiving production financing. As Convergent projects financed after April 1, 2019 are exempt from installing a CMF digital tracking code, there has been a gradual tapering (-5%) of active projects reporting data in the Convergent stream during the 2020–2021 reporting period.

### Experimental Stream – Production (Funded)

Experimental Stream production projects are now the primary focus of CMF's DM measurement strategy. These projects are currently supported through the following CMF programs: Commercial (C2P), Innovation, Digital Linear (formerly Web Series), International Incentives and the Shaw Rocket Fund programs. Many of these projects are web-based games that are available online via specific subscription platforms such as Steam (Valve), Nintendo, Sony and others. This stream also includes native application games hosted on Apple and Google, along with some software programs for consumer use. Within the 2020-2021 reporting window, 55 projects are tagged and reporting data through Adobe Analytics. Currently, 59% of the Experimental projects reporting are used on mobile phones and tablets, with the majority being downloadable and native applications. There was a 25% uptick in the use of computers (non-mobile devices) to access CMF projects during 2020-2021, which is likely due to the pandemic stay-at-home orders.



## CANADA MEDIA FUN

# LANGUAGE AND CONTENT TYPE

### Convergent Stream – Production (Visits)

Within the Convergent Stream, the Top 5 projects attract 87% of all visits to CMF Digital Media (DM) projects, with the top 3 (English) projects responsible for 81% of all visits overall across all languages and content types. Projects financed in 2017 or later are the most visited, and tend to drop significantly when their companion television components are no longer airing. This is most noticeable in the French market, as the DM components tend to correlate with their television program(s) on an episodic level (i.e., the number of visits dip significantly after each episode airs), while English market visits to DM projects remain relatively stable throughout the television season but then drop off at season's end. This suggests that DM components in the Convergent Stream are highly dependent on their linked TV content to remain relevant.

#### **English**

Three projects were responsible for 75% of all visits to CMF-funded English DM projects in 2020–2021. The first was the *CBC Kids Studio K* website portal with over 16 million visits, followed by *The Beaverton* website with approximately 9 million visits, and the *CBC Kids News* website with more than 7 million. In total, English-language projects attracted close to

34 million visits, with over 32 million to these three projects alone. All other CMF-financed English DM projects together registered the remaining approximate 2 million visits.

#### French

Most visits to French-language DM projects also come from a relatively small percentage of projects. The top 3 projects are responsible for 56% of total visits and are each tied to projects that perform well on the television side: *District 31* (SRC), *Passe-partout* (Télé-Québec) and *Infoman* (SRC). However, these DM projects dip significantly in visits when their television programs are in repeats or are no longer airing. Rich Interactive Media<sup>5</sup> projects continue to accumulate the most interest by attracting 69% of the total visits to projects in this category, followed by Games with 28%. French-language DM projects had close to 6 million total visits.

#### **Aboriginal**

(Note: has since been renamed to Indigenous for the 2021–2022 program year)

Content types in Aboriginal languages recorded over 92K visits overall. The Game content type performed best in this language category, with 59% session visits followed by Rich Interactive Media at 38%.

<sup>5</sup> Rich Interactive Media (Inclusive): Multimedia content that combines storytelling with visual technologies, where user participation and interactivity are successfully met through a fully rich immersive experience. Inclusive experiences usually begin on a single linear path, using levels to advance to a predetermined destination or goal. Rich Interactive Media (Non-Inclusive): Multimedia content that combines visual technologies, but is not structured to tell a complete story. Non-inclusive experiences require user participation and interactivity that is non-linear. The experience may also be segmented into unrelated, multiple content types (CMF-eligible).

#### **Convergent Projects**

2020-2021

Language/Content Type	Projects	Visits	Unique Visits
Aboriginal	31	92,494	55,738
Game	3	59%	45%
RIM Inclusive	18	31%	43%
RIM Non-Inclusive	7	7%	9%
Web Series	1	2%	2%
Social	1	1%	1%
Video	1	0%	1%
English	213	33,903,634	22,191,255
RIM Non-Inclusive	41	75%	77%
RIM Inclusive	82	22%	24%
Web Series	16	1%	2%
Game	22	1%	1%
Video	50	1%	1%
Social	2	0%	0%
French	213	5,894,634	2,846,372
RIM Non-Inclusive	69	37%	46%
RIM Inclusive	79	32%	38%
Game	29	28%	13%
Video	31	3%	5%
Web Series	5	1%	1%
Diverse	32	78,773	44,029
RIM Non-Inclusive	9	48%	75%
RIM Inclusive	19	43%	21%
Game	2	7%	2%
Web Series	2	4%	5%
Grand Total	521	40,048,308	25,181,423



#### Diverse languages

Content types in diverse languages (other than English, French, and Canadian Aboriginal languages) earned more than 78K overall visits. Within the content types measured in diverse languages, visits to Rich Interactive Media projects were the highest with 72K (91%). Visits to RIM projects were primarily derived from two projects, the Russian-language Documentary website project *Trojan Jazz followed* by the Chinese-language children's project Miaomiao.

#### **Experimental Stream -Production (Visits)**

The top 2 projects account for 82% of all visits to Experimental projects. The number of active projects in the Experimental stream remains relatively small (55 projects). Yet, there was an increase of over 1M visits to projects in the Experimental Stream versus one year ago. The top project *Overloot* (1.8M visits), a bilingual game application, was responsible for half of all Experimental stream visits.

#### **English**

English-language content types tallied 117K visits. Within the content types measured, a rise in visits were mainly attributed to the 2012–2013 funded game application Chat Fu and the 2013-2014 funded software project Shot Lister App.

#### French

French Experimental projects garnered 48K visits, a decrease of 44% from the previous year. Generally, the top-performing projects remained the same. However, the decrease was primarily due to less user activity than the previous year. The web series projects *Têtes à claques* volume 5 (YouTube), Marika III (ICI Tou.tv) and L'Âge adulte seasons 2 and 3 (SRC) brought 73% of the total visits to this category.

#### Bilingual

More than half of the projects reporting data in the Experimental stream are bilingual (French and English) projects. This category recorded 3.6M visits, the highest to date. The 2017–2018 Overloot game along with the 2013–2014 brainCloud and Foundation Apps were responsible for 82% of the visits within this category. Overall, games and software content saw the most activity.

#### **Experimental Projects** 2020-2021

Language/Content Type	Projects	Visits	Unique Visits
English	17	116,939	65,515
Game	3	46%	61%
RIM Inclusive	10	30%	24%
Software	2	17%	6%
Web Series	2	7%	10%
French	9	48,249	28,135
Web Series	7	99%	99%
RIM Inclusive	1	0%	0%
RIM Non-Inclusive	1	0%	0%
Bilingual	29	3,638,467	1,721,741
Game	15	56%	22%
RIM Inclusive	7	36%	70%
Software	4	8%	8%
RIM Non-Inclusive	1	0%	0%
eBook	1	0%	0%
Video	1	0%	0%
Grand Total	55	3,803,655	1,815,391

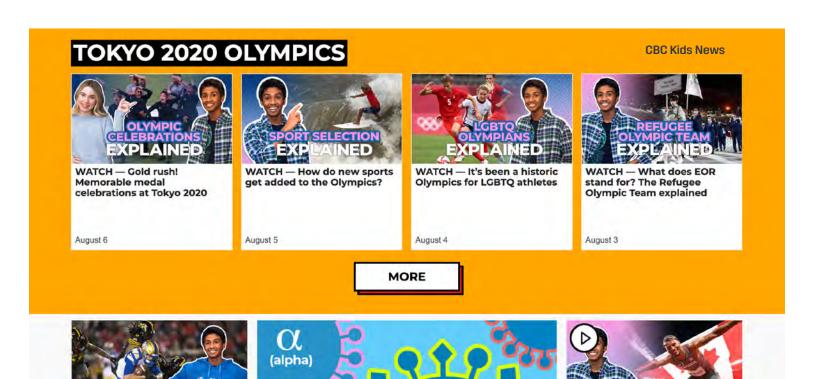
#### Digital Media Users by Region

Convergent projects are commissioned by Canadian broadcasters. As such, Canadians usually represent the largest user group. In 2020-2021, Canada and the US saw an overall growth in visits to Convergent projects. This increase in engagement is primarily attributed to the top 3 projects: CBC Kids Studio, a portal for kids programming that is evergreen in nature, and *The Beaverton* and *CBC Kids* News, which are satirical and/or highlight current events. While these three projects have traditionally been the top-visited CMF Convergent projects, within Canada (the largest share) there was a 35% increase in visits. This lift in engagement is likely due to the increased digital consumption seen as

Canadians were under a stay-at-home order for three-quarters of the year. During this period, there was a 40% transfer in volume of visits from countries across the rest of the world, predominantly to Canada at 69.3% (+35%) and the US at 17.8% (+5%).

Experimental Stream projects continue to show a significant global reach, consistent with previous years. Just over 93% of all visits originated from the US and the rest of the world. However, the share of visits within the US grew by almost 19 percentage points, driven by a surge in visits to the *brainCloud Foundation* apps during the pandemic. Note that large year-to-year variances can occur in the Experimental stream, as often only one or two projects occupy most of the usage.

WATCH — The fastest man in the world? Olympic 100m explained



(delta)

10 things to know about

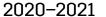
**COVID-19 variants** 

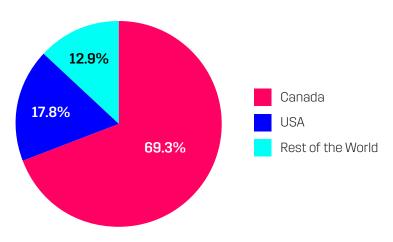
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#### **Usage by Geographic Region**

April 1, 2020 to March 31, 2021 CMF Media Analytics (Adobe Analytics)

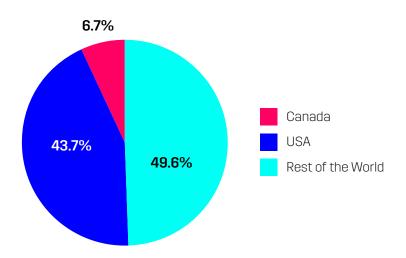
#### Convergent





#### **Experimental**

2020-2021



The CFL is back! Here are 5 things



The Minister of Canadian Heritage announced the creation of the COVID-19 Emergency Support Fund for Cultural, Heritage and Sport Organizations. The objective of the \$500M Emergency Support Fund (ERF) was to provide temporary relief to cultural, heritage and sport organizations and help them plan for the future.

The CMF was one of the organizations selected to deliver this support to the audiovisual industry. The CMF received \$120.2M; \$101.2M was distributed in 2020–2021 and the remaining \$19.0M will be distributed in 2021–2022.

The CMF further supported the industry through this challenging period by effectively utilizing the whole range of organizational resources and capabilities: the regular programs; the industry leadership of the management team on the equity, diversity and inclusion matters; industry sponsorships; communications infrastructure; and the research and intelligence capacities.

The CMF successfully delivered ERF funding to stakeholders – from coast to coast, in both Linear and IDM, and to equity- and sovereignty-seeking groups – through a combination of targeted programs for production companies, partnerships with other agencies, sector development and sponsorships.

# CANADA MEDIA ELIM

#### **Emergency Relief Funds**

#### **ERF** Funding

	(\$M)
CMF-Administered ERF Programs (companies)	
· CMF Allocation	\$ 65.8
· Audiovisual	6.4
· Interactive Digital Media	5.5
· Third Language	2.8
· Regional	2.8
· English OLMC	0.7
· Black People and People of Colour (Allocation and Top-Up)	7.8
	\$ 91.8
Partner-Delivered ERF Programs (companies and individuals)	
· Indigenous Screen Office	5.2
ERF Funding Through Regular CMF Programs (projects)	
· English Regional Production Bonus	0.8
· Francophone Minority	0.4
· Regional Production Incentive	0.4
· Northern Incentive	0.2
	\$ 1.8
Sector Development Support	1.6
Administration (including research, and partner admin)	0.8
	\$ 101.2

## **Emergency Relief Funds Administered by the CMF**

The CMF distributed a total of \$91.8M to production companies through eight application-based ERF programs. These eight programs represent 91% of all ERF funding.

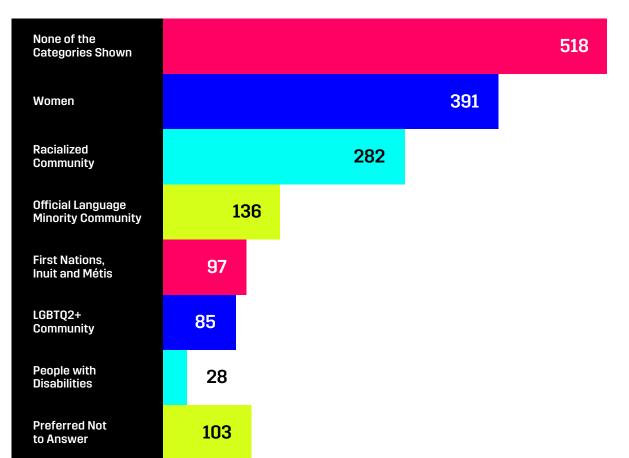
Companies in all provinces and two territories received assistance from these programs.

No applications were received from companies based in the Northwest Territories.

Five of the eight application-based ERF programs administered by the CMF, totalling \$15.7M in funding, targeted companies owned by members of equity-seeking groups: Regional, Black People and People of Colour (BPOC), Official Language Minority Communities (OLMC) and Third Language. The ownership information self-declared by companies at application indicates that these programs had an intersectional impact: the Regional Allocation benefited OLMC owners and the Third-Language Allocation aided women, OLMC owners and company owners with disabilities.

## Owner of recipient company declared belonging to:

#### **Number of recipients**





#### Partner-Delivered Emergency Relief Funds

As the CMF collaborates with the Indigenous Screen Office (ISO), the CMF transferred \$5.5M in Emergency Relief Funds (\$5.2M for programs, \$0.3M for administration) to the ISO. These funds were distributed to 295 recipients through four programs:

Emergency Relief Funding: Funding program to support eligible Indigenous productions with COVID-19-related business continuity expenses such as health and safety consultants, extended production dates and associated costs, personal protective equipment, and insurance. \$1.7M was allocated to 53 companies.

#### Indigenous Development Grants Program:

Funding program to support both project and professional development for Indigenous

individuals and majority-owned Indigenousowned companies. \$1.6M was allocated to 31 companies and 58 individuals.

**ISO Partnership Program:** Funding program to support the business continuity needs of Indigenous creators (e.g., online training, innovation strategies) during the pandemic. Twenty-nine organizations received \$1.3M.

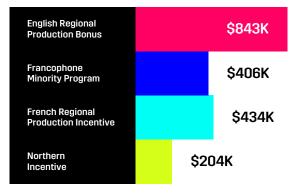
Solidarity Fund: Partnering with the Racial Equity Media Collective and BIPOC TV & Film, this strategic initiative supported the project and professional development for racialized screen-based creators, particularly Black creators. Individuals received \$1.3M, and 32 companies received \$1.0M. \$1.7M in third-party contributions supported this initiative in addition to the ERF funding.

#### ERF Funding for Projects Channelled Through Regular CMF Programs

In addition to ERF programs conceived for targeted groups (ISO Allocation, Regional Allocation, English OLMC Allocation, BPOC Allocations, and Third-Language Allocation), existing CMF programs were leveraged to channel further ERF funding to regional and under-represented communities, providing additional efficiencies. A total of \$1.8M in CMF ERF funding was distributed through four regular CMF programs to support projects from regional and OLMC communities.

#### **Total Funding Distributed**

\$1.8M



#### **Sector Development Support**

\$1.6M was allocated to Sector Development Support. Of that, the majority was for targeted emergency initiatives for equity-and sovereignty-seeking communities.

A total of \$1.1M was distributed to 19 organizations through the Black People and People of Colour Sector Development Support program. These organizations are BPOC controlled and led by Canadian BPOC persons. The projects contribute to sector development through capacity-building programs such as mentorship, professional development and training.

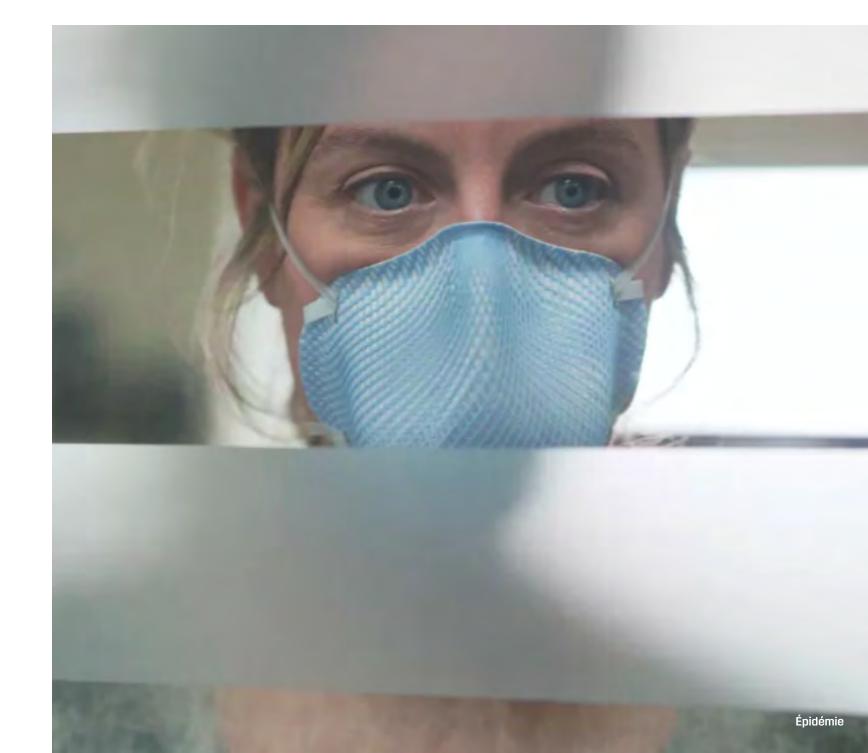
## **Approved Applications for CMF COVID-19 Emergency Relief Funds**Black People and People of Colour (BPOC) Sector Development Support

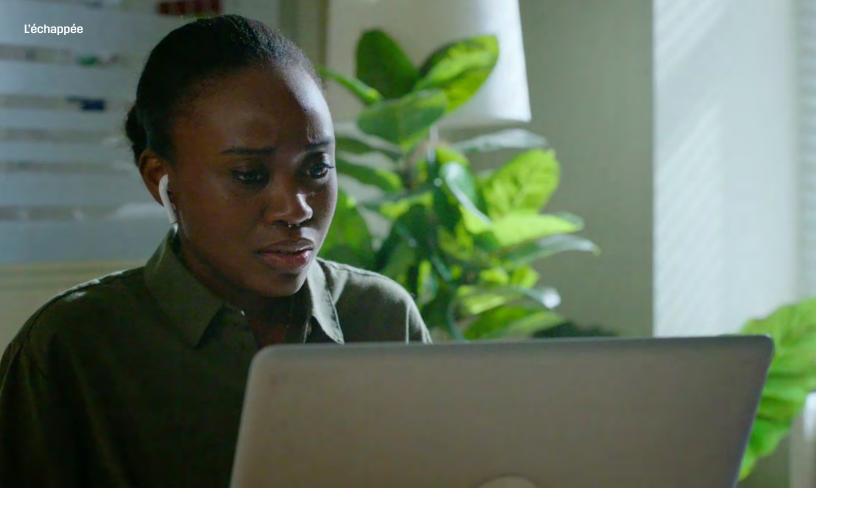
Applicant	Province	Emergency Fund Amount \$
Afro-Prairie Film Festival	Manitoba	20,000
Afrotropolis	Ontario	50,000
BIPOC TV & Film	Ontario	100,000
The Black Academy	Ontario	100,000
Black on Black Films	Quebec	50,000
Black Screen Office	Ontario	100,000
Black Women Film!	Ontario	15,000
Canadian Independent Screen Fund	Ontario	60,000
CaribbeanTales	Ontario	15,000
Cinevolution Media Arts Society	British Columbia	50,000
Coalition M.É.D.I.A	Quebec	100,000
Creatives Empowered	Alberta	50,000
FacinAsian Film Festival	Manitoba	20,000
Foundation Fabienne Colas	Quebec	15,000
Main Film	Quebec	50,000
Pixelles	Quebec	75,000
Racial Equity Media Collective	Ontario	100,000
Reelworld Screen Institute	Ontario	100,000
Vancouver Asian Film Festival	British Columbia	15,000

#### **Introduction of Flexibility Measures** in Regular CMF Programs

The CMF introduced flexibility measures across its regular funding programs in 2020–2021 to ensure continued access to funding for development and production during the pandemic, and to support stability and business continuity in the industry. Measures included the lowering of minimum fee thresholds, increases

in the CMF's maximum contributions to projects, flexibility in the allocation of funding between development and production in envelope programs, flexibility in the project and financial commitment schedules for producers and broadcasters, accelerated payment schedules and adjustments to documentation requirements.





#### **Communications**

The CMF maintained frequent communication with clients and industry stakeholders on pandemic relief funding and measures through email and social media (Facebook, Twitter, LinkedIn and Instagram). Sixteen bilingual multichannel campaigns were executed between March 2020 and April 2021, announcing new programs, criteria, application deadlines and other significant developments. Each campaign reached, on average, 6,540 subscribers in English and 3,316 subscribers in French (with an average open rate of 40% and 33%, respectively).

The CMF also created a dedicated weekly COVID-19 newsletter to inform industry stakeholders of local, national and international pandemic-related news relevant to our sector. Sixteen newsletters were produced and disseminated (through email and social media) between April and July 2020, in the critical

early phases of the pandemic. Each newsletter reached, on average, 6,845 subscribers in English and 3,639 subscribers in French (with an average open rate of 36% and 31%, respectively). As the pandemic moved into its subsequent stages, the dissemination of pandemic-focused news was transitioned back to regular CMF communication channels in midsummer 2020, where it continues to this day.

MADE | NOUS, the CMF-led national campaign to promote Canadian content creators and their work, also saw adjustments in response to the pandemic. Virtual programming and events, safety-compliant in-person events and diversity-focused celebrations were developed to continue to promote Canadian stories and screen talent to audiences in Canada and abroad.

#### Research

The CMF commissioned and published studies, information resources and guides to better understand the impact of the pandemic on the industry and to share key information with Canadian companies and industry workers.

#### Research

- Cross-country survey of Canadian production companies in the film, television and interactive digital media industries to monitor the ongoing impacts of the pandemic, in collaboration with national, provincial and territorial industry associations and funders (five survey waves in English and French between August 2020 and February 2021)
- Special edition of the CMF's annual Trends
  Report focusing on the pandemic, its impact
  and potential long-term effects (released
  February 1, 2021) Viewed 10,617 times
  (7,363 in English, 3,254 in French)

#### Resources

- Bilingual online hub for the Canadian screen industries with key news and information about the pandemic (launched April 2020) 20,147 page views (14,640 in English, 5,507 in French)
- Bilingual directory of COVID assistance programs available to Canadian companies and workers in the screen industries in all regions of the country (launched April 2020)
- Bilingual directory of mental health resources for industry workers

The CMF also funded and supported pandemic-focused research led by industry partners, including the CMPA, WIFT Canada Coalition, WIFT-Alberta, DigiBC and the Game Arts International Network (e.g., *Isolation Nation*, with work-from-home tips, best practices and insights about remote video game creation).





# EXPERIMENTAL: NON-LINEAR

The CMF funds interactive digital media content through our Experimental Stream, covering the entire life cycle from development to release.

The **Conceptualization Program** allocates funding at the very beginning of the creative process, with the objective of giving a project a better chance of success in future stages of financing. Specifically, this program allows for the creation and testing of a proof of concept and verification of the design idea, the concept assumption or functionality in preparation for the prototyping phase and beyond. New for 2020–2021, 40% of the program budget was set aside for applicants outside of Montreal and Toronto to foster production across the country.

The **Prototyping Program** allocates funding to projects in the early stages of building a product to help demonstrate its intended functionalities and design. Specifically, this phase is for experimenting, testing and validating different concepts and hypotheses, to arrive at a first functional prototype.

With guidance from a jury of industry peers, the Innovation & Experimentation Program funds Canadian interactive digital media content and software applications that are innovative and leading-edge. In 2020–2021, a total of \$15.0M was invested in 22 projects.

The objective of the **Commercial Projects Program**, also guided by a jury, is to fund projects that have a greater probability of commercial success. Projects are evaluated on their potential to attain stated commercial objectives, demonstrate business opportunity and achieve profitability. A total of \$12.6M funded 14 productions in 2020–2021.

Both the Innovation & Experimentation and Commercial Projects Programs fund projects for their production and marketing expenses.

#### The Accelerator Partnership Program (A2P)

provides producers of digital media projects funded through the CMF's Experimental Stream with better access to mentorship, markets and capital. The A2P connects funding recipients with renowned Canadian and foreign accelerators that are selected based on their ability to work with the diversity of projects and producers supported by the CMF, across the country and abroad.

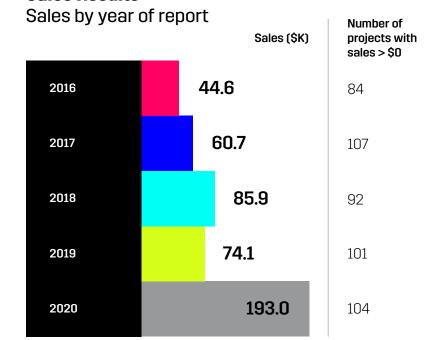
The demand for funding of non-linear projects through all Experimental Stream programs stayed high in 2020–2021.



#### **AWARDS**

- Total number of nominations: 18
- Total number of awards: 4
- Number of projects nominated: 10
- Number of projects awarded: 4
- Highlight: A Fold Apart7 nominations, 1 award

#### **Sales Results**



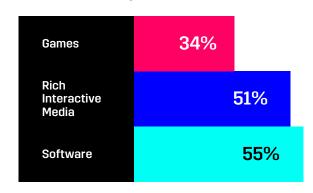
## **Top Project** 2020



#### **Gender Balance Results**

2020–2021 Experimental Production by content type

#### Women as % of Key Personnel



In the selective programs for 2020–2021, three points were given to projects that had women in at least 40% of key leadership roles. Software and Rich Interactive Media projects attained the 50% mark in gender balance in key roles.

#### **Production Volume Triggered**

by CMF funding 2020–2021





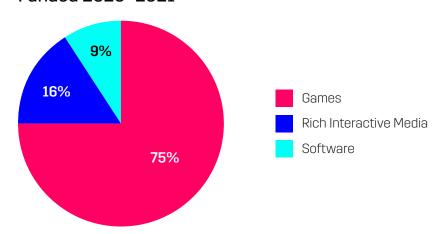
#### **Funding by Stage of Project**

2020-2021

	\$K	# of Projects
Conceptualization	819	56
Prototyping	8,887	45
Production	27,626	36
Marketing	1,660	9
Accelerator	270	9
Total	39,372	155

#### **Type of Production Projects**

Funded 2020-2021



## A FOLD APART





A Fold Apart is a 3D puzzle game that explores the emotional struggles of a couple maintaining a long-distance relationship. Robyn and Mark love each other very much, but they are separated on opposite sides of a piece of paper. Only by folding the paper is the player able to create pathways across the impossible divide between them. Over 100 levels are set among the couple's shared memories of the past, struggles of the present and hopes for the future.

Nominated for seven awards at the 2021
Canadian Game Awards: Best Narrative, Best
Score/Soundtrack, Best Art Direction, Best Indie
Game, Best Debut Indie Game, Fans Choice Award
and Best Mobile Game. Winner of award for
Best Mobile Game.



The CMF funds production of digital linear series through three programs in the Experimental Stream, covering development and production stages.

The **Digital Linear Series Program** supports the production of series in their second or subsequent season that were created initially for online platforms and in designated CMF genres. A total of \$4.0M went to 18 projects in 2020-2021.

A collaboration between the Canada Media Fund and the Shaw Rocket Fund, the CMF-SRF **Kids Digital Animated Series Program** funds the production of Canadian digital animated series for children and youth while encouraging the use of new technology. A total of \$3.0M in CMF funding and \$1.5M in SRF funding went to 10 projects.

New for 2020-2021, the CMF partnered with the Independent Production Fund to support the development of drama series designed for online in the CMF-IPF Development Packaging Program: Short Form Scripted Series. \$289K from the CMF supported 20 projects, with \$293K from the IPF.

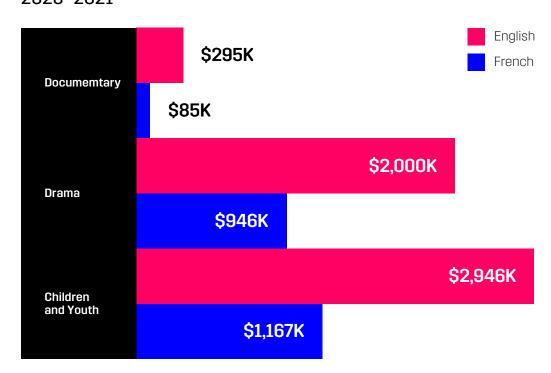


125

## **Digital Linear Series Production Volume Triggered by CMF Funding** by CMF funding 2020–2021



## Digital Linear Series Funded by Language and Genre 2020-2021



#### **Gender Balance Results**

2020-2021 Digital Linear Series

Women as % of Key Personnel



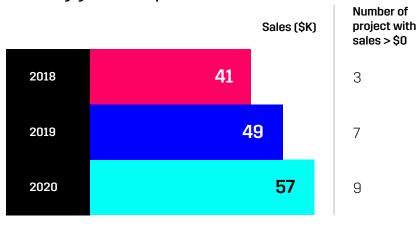
In the selective programs for 2020–2021, three points were given to projects that had women in at least 40% of key leadership roles.

\$741K Average Budget

28
Number of Projects

#### **Sales Results**

Sales by year of report



Digital Linear Series are starting to show increasing sales, now that the program has been active for five years. However, the average sales per project are around \$12K.

#### **Top Project in Sales**

2020

\$20K

## **AVOCADO TOAST**



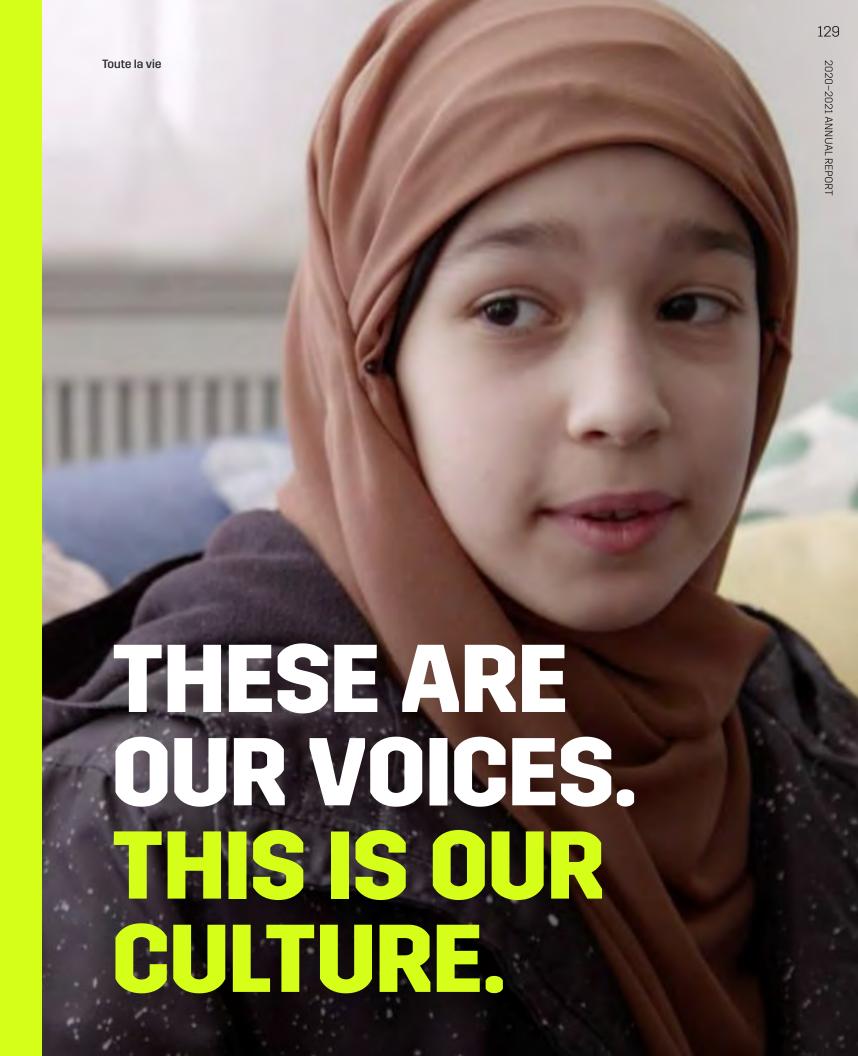
Avocado Toast is a scripted intergenerational sex comedy exploring the comforts and awkwardness of sex from ages 30 to 69. When it comes to millennials and baby boomers, these nuts haven't fallen so far from the family tree.

Nominated for four Canadian Screen Awards: two nominations for Best Lead Performance, Web Program or Series and two nominations for Best Supporting Performance, Web Program or Series.

Series renewed by OUTtvGo.com for a second season and increased financial commitment.

Season 1 distributed on VOD and SVOD platforms

in Canada, USA, Australia, New Zealand, South Africa, India, United Kingdom and Japan, and in English-, Spanish- and German-speaking Europe. Available globally via Amazon Prime, Apple TV, Google Play, OUTtvGo, Tello Films, HighBall.TV, Pluto TV, hoopla, Outfilm Poland, Vimeo and more!



The **Convergent Stream** supports the creation of multi-platform Canadian content.

Approved production projects must include content intended for distribution on at least two platforms, one of which can be traditional television, and the other an on-demand platform. More specifically, this Stream enables the development and production of television shows and related digital media content in four under-represented genres: drama, documentary, children's and youth, and variety and performing arts. The Convergent Stream is designed to give users access to Canadian-produced content, anytime, anywhere, on any device.

This Stream comprises several different programs and incentives that encourage the creation of content from all regions of Canada and in all languages spoken by Canadians.

Programs in this Stream support the goal of bringing more diverse voices into content shown on our screens. Most of the funding in this stream is disbursed through the Performance Envelope Program.

#### **Production**

The objective of the **Performance Envelope Program** is to encourage partnerships between broadcasters and producers to create convergent content that Canadian audiences can consume at any time and on the device of their choice. Through this program, the CMF allocates funding envelopes to English and French broadcasters in an amount that reflects their track record of supporting and airing Canadian programming. Broadcasters commit these funds to Canadian projects, but funding is paid directly to the copyright holder of the project. Total funding committed from the Performance Envelope Program in 2020–2021 was \$230.2M for 458 projects. Commitments from the Performance Envelope Program increased by \$1.5M from 2019-2020.



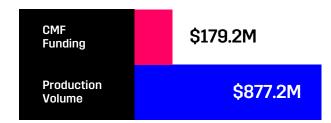
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# 2020–2021 ANNUAL REPORT

# ENGLISH PRODUCTION FINANCING

#### **Production Volume Triggered**

by CMF funding 2020-2021

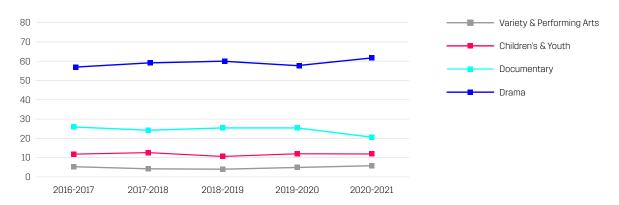


**Total Hours Funded** 2020–2021

908

7.5%
Increase in Production
Volume over 2019–2020

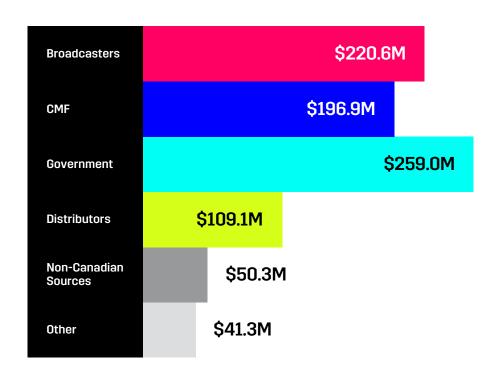
#### Trends in Shares of English Funding (%)



Support for English-language point of view (POV) documentaries is provided through the English POV Program. Funding is allocated according to a selective process, using an evaluation grid. A total of \$4.6M was committed to 15 projects in 2020–2021.

The Children's & Youth share of English Convergent funding (11.9%) has stayed close to last year's level and the five-year average of 12%. For comparison, however, the Performance Envelope Program English Children's & Youth genre target is 21%. There are other CMF programs that support production of content targeting Children and Youth – see the Digital Linear Series section of this report.

### **English Production Financing** 2020–2021



CMF funding provided 22.4% of total production financing, and broadcasters provided 25.2%. Total production volume was \$877M, 7.5% higher than 2019–2020.

**FEATURING** 

## **YOU CAN'T ASK THAT**



Each episode of You Can't Ask That asks a group of people with the same disability the awkward or uncomfortable questions you are too afraid to ask. Their answers explore a wide range of emotions and challenge assumptions about what it's like to live with a disability. Topics discussed during the second season include growing up with a disability, post-traumatic stress disorder (PTSD), deafness, schizophrenia, multiple sclerosis, bipolar disorder, Parkinson's, and generalized anxiety disorder.

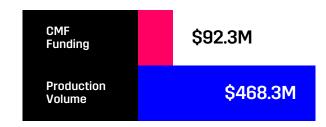


# 2020-2021 ANNUAL REPORT

# FRENCH PRODUCTION FINANCING

#### **Production Volume Triggered**

by CMF funding 2020-2021

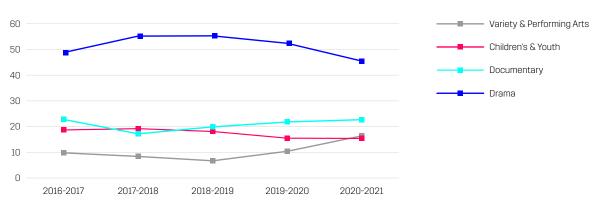


**Total Hours Funded** 2020–2021

1,645

0.3%
Increase in Production
Volume over 2019–2020

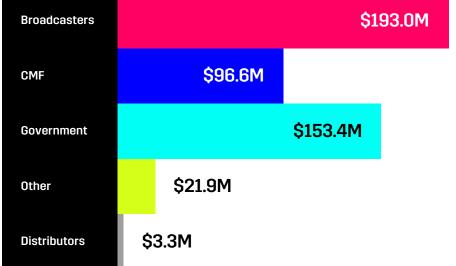
#### Trends in Shares of French Funding (%)



The effects of the pandemic reduced the share of funds going to Drama production, and increased Variety & Performing Arts production.

#### French Production Financing





 $^1\mathrm{CMF}$  financing shown in the charts includes commitments for some projects over two fiscal years, which are not included in the 2020–2021 Total CMF funding.

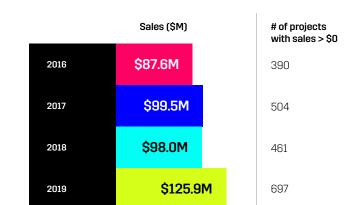
CMF funding provided 20.6% of total production financing, and broadcasters provided 41.2%.

Production volume reached a record high of \$468M.

## **POLICIER AUTOCHTONE**



Policier autochtone presents the challenges that police officers face on a daily basis, and reveals the various cultural and social realities to which they are exposed. Following in the tracks of five pairs of police officers from different Indigenous communities, the series sheds light on the main challenge they face: intervening in the community in which they grew up. This reality leads to particularly complex interactions: arresting a cousin or a close relative or – worse still – responding to the assault or suicide of a loved one.



\$143.5M

891

By Year of Report - All Languages

**Sales Results** 

2020

**Top 5 Projects in Total Sales** 2020

\$27.6M

**Average Sales in Top 5** 2020

\$5.5M



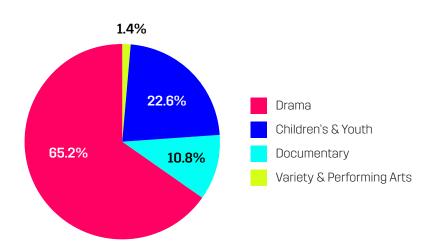
CMF-Quebecor Fund Intellectual Properties Intended for International Markets Production Support Program

The CMF partnered with the Quebecor Fund to support liveaction French-language drama series created by Quebec-based producers and to bring these projects into the international marketplace. After being selected by the Quebecor Fund and the CMF, successful applicants received funding to supplement the CMF's Performance Envelope contribution in order to increase production value. The CMF contributed \$1.1M to nine projects through this program.

#### **AWARDS**

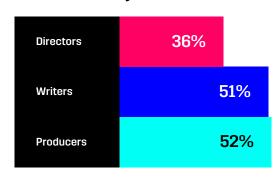
- Total number of nominations: 906
- Total number of awards: 242
- Number of projects nominated: 259
- Number of projects awarded: 88
- Most awarded comedy: Schitt's Creek
- Most awarded drama:
   Tribal

## **Sales Results by Genre** 2020 – All Languages

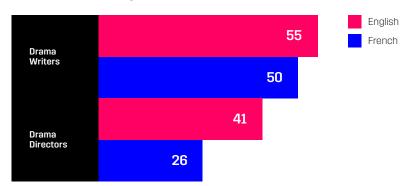


## **Gender Balance Results** 2020-2021

#### Women as % of Key Roles



#### Women as a % of Key Roles in Drama Production





# CANADA MEDIA FUND

## DEVELOPMENT

The CMF supports the predevelopment and development of Canadian convergent content through several programs. Development support has also been earmarked within the Indigenous and Francophone Minority Programs, as well as the regionally targeted programs highlighted in the Regional section of this report.

#### **Development**

The **Development Envelope Program** allocates funding envelopes to English and French broadcasters in an amount that reflects their track record of supporting the development of Canadian programming. Broadcasters commit these funds to Canadian projects, but funding is paid directly to the producer.

An innovative experiment in financing development without a broadcaster trigger was made through the **Development Pilot Program – Experienced Producers**.

#### WildBrain

The WildBrain-CMF Kids & Family Development Program was funded through financial contributions from WildBrain Television Inc., made in accordance with the CRTC's Tangible Benefits Policy. The program targeted development activities in the genres of Children's and Youth and Family Drama. \$743K was committed to 15 projects. This is the second and final year of the Program.

#### **Predevelopment**

The **Early-Stage Development Program** shifted from its pilot form to a writer-focused, selective program. In 2020–2021, 40% of the program budget was reserved for writers who are Indigenous or who identify as Black or a person of colour. 69% of Program funds went to writers in those communities.

The **Predevelopment Program** served creative teams led by a producer at a project's early stage with no financial commitment from a broadcaster required. 40% of the program budget was reserved for applicants outside of Toronto and Montreal. 41% of the English budget of the Program went to Regional producers, and 33% of the French budget of the Program went to Regional producers.

#### CMF Funding (\$K)

	English	French	Total
Development	7,457	2,952	10,409
Predevelopment	2,500	1,050	3,550
Total	9,957	4,002	13,959
		7,002	10,0

#### **Number of Projects Funded**

	English	French	Total
Development	169	119	288
Predevelopment	86	40	126
Total	255	159	414

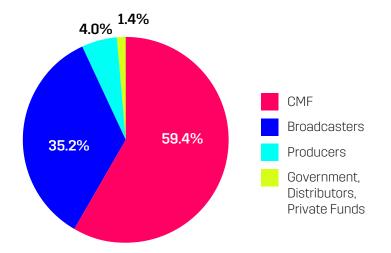
## PARTNERSHIP HIGHLIGHT

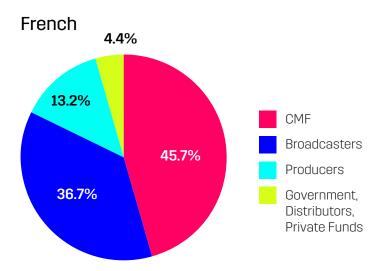


The CMF/SODEC Pre-Development Program for Television Series Based on Literary Adaptations is a new partnership for 2020–2021. \$250K was committed by the CMF to support 15 French-language projects from Quebec.

## **Share of Development Financing**

## English





## FEATURING

## THE PORTER



The Porter is a Canadian television drama series that will premiere on CBC Television in 2022. A historical drama, the series will depict the history of Black Canadian and African-American men who worked as Pullman porters in the period following World War I. The series will air in the United States on BET+.

**FEATURING** 

## C'EST COMME ÇA QUE JE T'AIME



C'est comme ça que je t'aime (in English, Happily Married) is a crime comedy-drama set in Quebec City in the 1970s. The series centres around two married couples in suburban Sainte-Foy who deal with problems in their marriages by embarking on a crime spree while their children are away at summer camp.

A second season was announced in early 2021. The series won 10 Prix Gémeaux in 2020, including the award for Best Dramatic Series. In 2021, the show won the Rogers Prize for Excellence in Canadian Content at the Banff World Media Festival.

## DIVERSE PRODUCTION FINANCING

The **Diverse Languages Program** is designed to support independent production in languages that reflect the diversity of Canadians, outside of English, French and Indigenous languages. Funding is allocated according to a selective process, using an evaluation grid.

\$3.3M

18
Number of Projects

22.5
Hours Funded

Languages Funded
Italian, Mandarin, Polish, Portuguese,

Russian, Spanish, Tagalog



The CMF supports First Nations, Inuit and Métis television production, development and predevelopment.

The Indigenous Program supports Indigenous-language production, development and predevelopment in Canada. Production funding from this program is allocated according to a selective process and evaluated by a jury of cultural experts from Indigenous communities. In 2020–2021, the Indigenous Program supported 13 productions and 34 development and predevelopment projects with \$8.7M in funding.

An additional \$4.1M in funding for Indigenous
Program productions came from the
Performance Envelopes Program, the English
Regional Production Bonus, the Anglophone
Minority Incentive, the Quebec French Regional
Production Incentive and the Northern Incentive.

Our 2020-2021 funding supported projects that celebrated and highlighted First Nations, Inuit and Métis communities from five provinces and Nunavut.

## **Broadcasters 2020–2021**

APTN
Nunavut Independent Television Network
CBC
Radio-Canada
Blue Ant Media



## **AWARDS**

- Total number of nominations: 31
- Total number of awards: 13
- Number of projects nominated: 7
- Number of projects awarded: 3
- Highlight: Blood Quantum
   10 nominations, 6 awards

**Total Funding**All CMF Programs

\$11.7M

**Average Budget/Hour** 

\$504K

13
Number of Productions

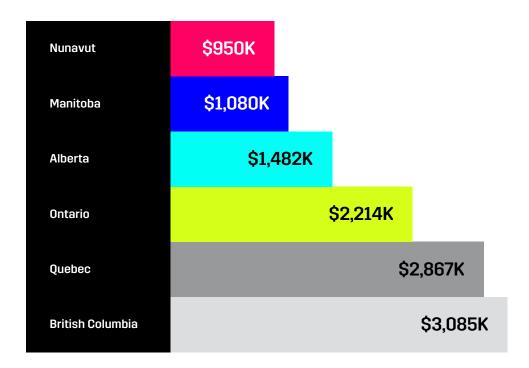
**Development Projects** 

2020-2021

\$1,088K

34
Number of Projects

## Indigenous Program Production Funding by Province 2020-2021



## **Funding**

Comparison with 2019-2020



### **Production Volume**

Comparison with 2019-2020



**FEATURING** 

## MERCHANTS OF THE WILD



A journey of a lifetime takes place for six Indigenous adventurers over the course of 25 days living off the land. The adventurers paddle birchbark canoes through Mi'kmaq territory in Nova Scotia following an old waterway trade route, also used by the Mi'kmaq to come from the ocean inland at the end of summer. They will begin their journey with only a few necessary tools and a limited supply of resources.



# OFFICIAL LANGUAGE MINORITY COMMUNITY SUPPORT

A key mandate for the CMF is to support the content created in official languages in minority settings.

## **French Minority Language Funding**

The **Francophone Minority Program** is designed to encourage the creation of projects that reflect the realities experienced by French-language communities living outside the province of Quebec. In 2020–2021, the Francophone Minority Program supported 29 productions and 10 development projects with \$11.5M.

French minority language productions received an additional \$406K from the COVID-19

Emergency Fund CMF allocation and \$6.0M from the Performance Envelope Program and the Northern Incentive.

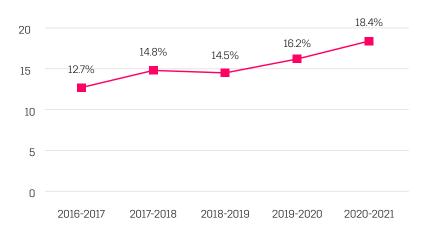


\$17M 18.4%

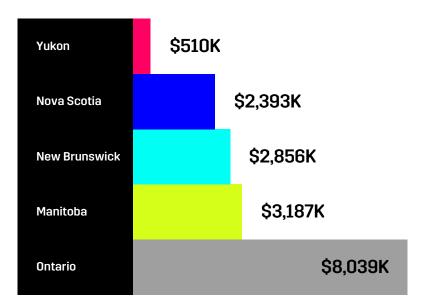
Percentage of French Funding

## **Trend of French Minority Language**

% of French TV Funding



## **French Minority Production Funding by Province**



**FEATURING** 

## **TOUT SIMPLEMENT** COUNTRY



Tout simplement country is a musical variety show from Nova Scotia hosted with heart and passion by country musician Guylaine Tanguay. Throughout its 12 60-minute episodes, the show is an opportunity to showcase Canadian Frenchspeaking country music and artists.

## **AWARDS**

- Total number of nominations: 35
- Total number of awards: 16
- · Number of projects nominated: 10
- Number of projects awarded: 4
- Highlight: **Transplant** 8 nominations, 5 awards

## **English Minority Language Funding**

The **Anglophone Minority Incentive** is intended to create a predictable source of official minority language support for the English market in Quebec.

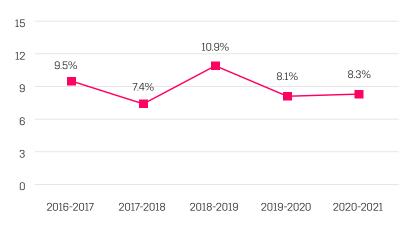
In 2020–2021, the Anglophone Minority Incentive supported 16 production projects with \$4.2M.

English minority productions received an additional \$10.7M from the Performance Envelope Program, the English POV Program and the Indigenous Program.

\$14.9M 8.3%

**English Funding** 

## **Trend of English Minority Language** % of English TV Funding



## **FEATURING**

## **TRANSPLANT**



The series centres on Bashir "Bash" Hamed, a doctor from Syria who comes to Canada as a refugee during the Syrian Civil War, and is rebuilding his career as a medical resident in the emergency department at the fictional York Memorial Hospital in Toronto.

Nominated for six CSAs in 2021, winning four (Best Dramatic Series, Best Actor in a Drama Series, Best Direction in a Drama Series and Best Writing). The show has been renewed for a second season, and *Playback* magazine named lead actor Hamza Haq as Canadian television's breakout star of 2020.

## REGIONAL SUPPORT

The CMF supports projects from outside Canada's main production centres by providing several incentives in its Convergent Stream. In order to address the geographical dynamics that influence economic activity and decision-making, regional production for English-language projects refers to projects outside a radius of 150 kilometres from Toronto, while regional production for French-language projects refers to projects outside a radius of 150 kilometres from Montreal.

Regional production maintained last year's record high levels in 2020–2021 in both English and French languages.

The English Regional Production Bonus provides additional funding for television producers in areas of Canada outside of Toronto. A total of \$13.1M went to 67 productions in 2020–2021. \$843K in COVID-19 Emergency Funds targeted to under-represented groups was added to this program.

Additional funding for Regional English-language productions came from the Performance Envelope Program, the English POV Program, the Anglophone Minority Incentive and the Indigenous Program.

The **Québec French Regional Production Incentive** gives additional funding to French
projects originating in Quebec but outside of
Montreal that are already funded through the

Performance Envelope Program. This Incentive provided a total of \$2.7M to 32 productions. \$434K was added to this program from the COVID-19 Emergency Funds for underrepresented groups. The **Québec French Regional Development** program provided a total of \$400K to seven projects.

The **Northern Incentive** supports production and development, in both English and French, in the northern territories. Nine productions received a total of \$1.0M. \$204K was added to this program from the COVID-19 Emergency Funds for underrepresented groups. Six development projects received a total of \$200K.

40% of the 2020–2021 **Predevelopment Program** was reserved for regional producers.

41% of the English budget of the Program
went to Regional producers and 33% of
the French budget of the Program went to
Regional producers.



## **PARTNERSHIP** HIGHLIGHT

The Creative BC/CMF Regional **Predevelopment Program** was a pilot program to support BCbased producers at the early stage of development. Special selection consideration was given to projects with key personnel that included Indigenous people, Black people and people of colour, and persons with a disability. \$125K

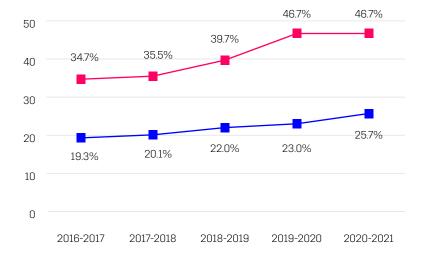
was committed to 13 projects.

## **AWARDS**

- Total number of nominations: 94
- Total number of awards: 29
- Number of projects nominated: 19
- Number of projects awarded: 12
- Highlight: **Tribal** 14 nominations, 10 awards

## **Trend of Regional Production Funding (%)**





## French Language Funding (%) 2020-2021

**18.4%** French Production Outside of Quebec

French Production **Outside of Montreal** 

## **Regional Development Funding (%)** 2020-2021

49.6% 32.4%

## **English Production Funding by Region**

2020-2021

Funding \$K				Funding %
Toronto			95,594	53.3%
British Columbia		23,275		13.0%
Montreal	1	14,333		8.0%
Alberta	1:	2,597		7.0%
Newfoundland	10	),622		5.9%
Nova Scotia	8,3	99		4.7%
Ontario excluding Toronto	7,16	64		4.0%
Manitoba	4,00	4		2.2%
Saskatchewan	2,027	7		1.1%
Quebec excluding Montreal	556			0.3%
Yukon	537			0.3%
Northwest Territories	108		0.2%	

## MOOSEMEAT & MARMALADE



Moosemeat & Marmalade brings two very different chefs together to explore culture, culinary traditions and really good food. In its fifth season, the documentary series chronicles the culinary adventures of bush cook Art Napoleon and classically trained chef Dan Hayes. As in previous seasons, each new episode delves into important trending food topics that go beyond just cooking and tasting local food to explore and educate on relevant societal topics.

FEATURING

## DE PAR CHEZ NOUS



The documentary series draws a portrait, on a human scale, of the regions of Quebec, but above all, of the people who live there and who energize their part of the country with inspiring and enriching local initiatives.

## EXPORTRELATED PROGRAMS

The CMF supports the export of Canadian content through three programs at both the development and marketing stages of a project's life cycle.

The Versioning Program and the Export
Programs promote content creation for
international markets, increase the volume of
content exports, create a leverage effect to help
finance additional content, and increase both
the reach and the revenue earned by Canadian
productions. These programs complement
the CMF's comprehensive international strategy,
which includes the launch and renewal of
numerous international incentives through
funding counterparts in various parts of the world.

The **Export Program** funds pitches and promotional activities during the development stage of television projects that are intended for international markets. \$2.8M was committed to 54 projects in 2020–2021, an increase of 9 projects from 2019–2020.

The CMF-Quebecor Fund Export Assistance

Program Partnership is an innovative initiative to jointly support the export of audiovisual content by Quebec-based producers to foreign markets. With projects initially evaluated and recommended by the Quebecor Fund, four companies received \$150K each in 2020–2021 to assist with the initial development of projects leading to international export pre-sales.





## **AWARDS**

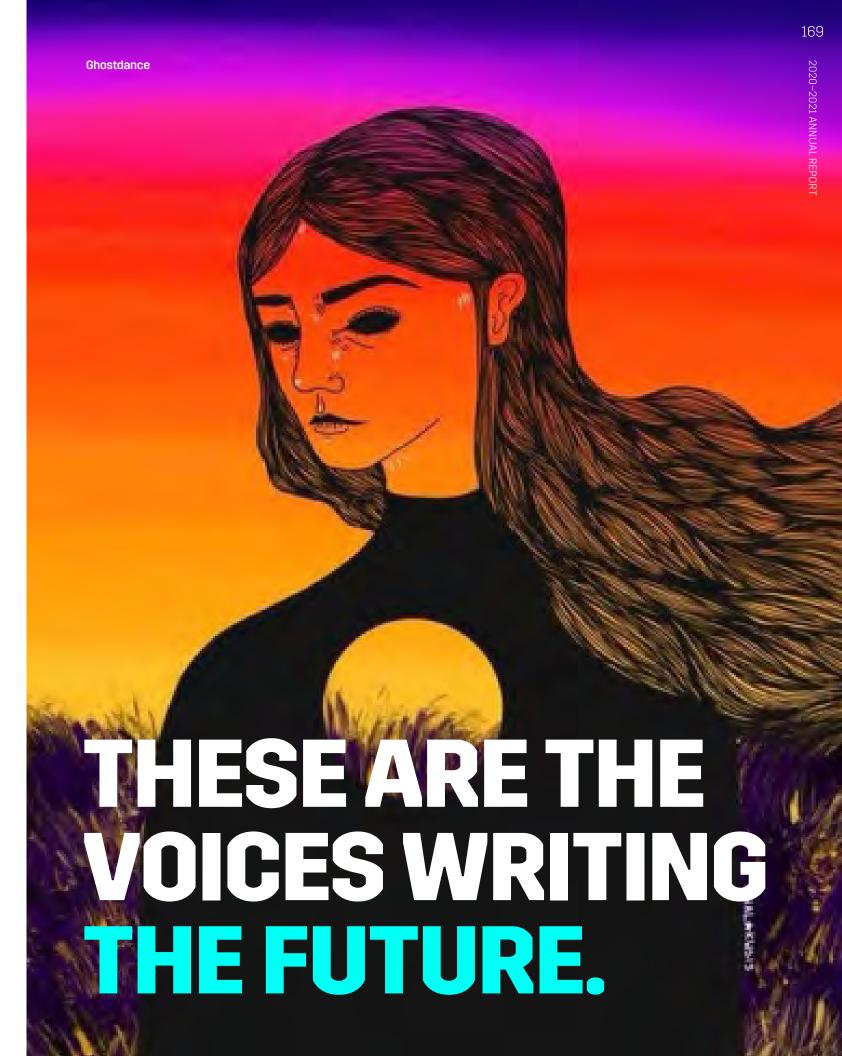
- Total number of nominations: 3
- Total number of awards: 2
- Number of projects nominated: 3
- Number of projects awarded: 2
- Highlight: L'Agent Jean!
   1 nomination, 1 award

## **Export Program Success Stories**

### **Ghostdance**

Ghostdance is an animated, fantastic drama intended for young adults. Using magical realism intertwined with an investigation, Ghostdance tackles the growing phenomenon of feminicide in the First Nations in Canada. The film is about the empowerment of a young indigenous girl who has to renew with her roots in order to move forward while bringing out the truth. The film is also a tribute to the activism of First Nations women who struggle every day to access safer living environments.

The **Versioning Program** is designed to expand the market accessibility and revenue potential of CMF-funded projects to other audiences by adding voice-overs and/or subtitles to projects, in languages other than the original language. Versioning increases revenue potential in other markets when Canadian projects gain further national and international sales. The CMF funded 31 versioning projects in 2020–2021, for a total of \$1.2M.



## INTERNATIONAL TREATY COPRODUCTIONS

International Treaty coproductions allow international and Canadian production companies to combine their creative and financial resources to create projects that can be granted national production status in each of the partnering countries, enabling each partner to leverage domestic and foreign funding.

International treaty coproductions are entitled to receive CMF funding for the eligible Canadian costs of the project. The number of international treaty coproductions funded by CMF increased to 23 in 2020–2021 from last year's 21.



## ANADA MEDIA FUND

## **List of Coproduction Countries** 2020–2021

# of I	Projec

	# of Projects
United Kingdom	9
Germany	3
Australia	2
Belgium	2
Finland	2
France	2
Ireland	2
Israel	2
China	1
Italy	1

Tri-party coproductions: Australia & Ireland, Belgium & Finland, Finland & United Kingdom.

## **Total Canadian Budgets for Coproduction Project**

2020-2021

\$69.8M

**23** 

**Total Projects Funded** 

10 Total Countries

## International Codevelopment and Coproduction Incentives

A total of 21 television and digital media projects were funded in 2020–2021 through international incentives with partner funding agencies from countries around the world. Although the number of Incentives decreased to six in 2020–2021 from eight last year, the value of funding to producers from CMF and partner agencies remained around \$2M.

## **Number of Projects**

2020-2021

**21** 

## **CMF Funding**

2020-2021

\$1,045K

## **Foreign Funding Partners**

2020-2021

\$1,169K

PROGRAM-FUNDING SUMMARY

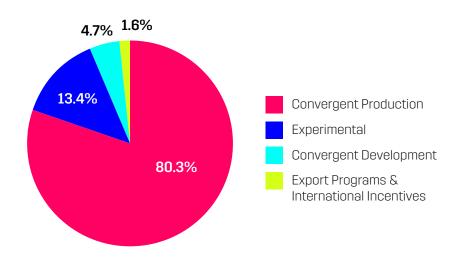
With the continued support of its funding contributors, the CMF invested \$347.3M in Canadian television and digital media projects through 38 programs in 2020–2021.

A total of \$1.5B of industry activity was triggered. 98.8% of the CMF budget for programs of \$351.6M was committed, despite the effects of the pandemic on production.

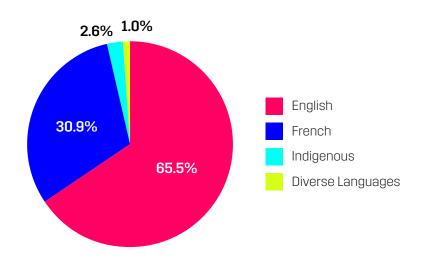
Notably, the volume of activity triggered by CMF funding grew in 2020–2021. **Total activity increased 3.5% from 2019–2020.** 



## **CMF Program Funding by Activity** 2020–2021



## **CMF Program Funding by Language** 2020–2021



## **CMF Total Program Funding**

2020-2021

\$347.3M

## **Breakdown by Program**

Innovation & Experimentation  Commercial Projects  Prototyping  Digital Linear Series  CMF-Shaw Rocket Fund Kids Digital Animated Series Program  Marketing  Conceptualization  Accelerator	15.0 12.6 9.0 4.0 3.0 1.7 0.8 0.3 46.4
Prototyping  Digital Linear Series  CMF-Shaw Rocket Fund Kids Digital Animated Series Program  Marketing  Conceptualization	9.0 4.0 3.0 1.7 0.8 0.3 46.4
Digital Linear Series  CMF-Shaw Rocket Fund Kids Digital Animated Series Program  Marketing  Conceptualization	4.0 3.0 1.7 0.8 0.3 46.4
CMF-Shaw Rocket Fund Kids Digital Animated Series Program  Marketing  Conceptualization	3.0 1.7 0.8 0.3 46.4
Marketing Conceptualization	1.7 0.8 0.3 <b>46.4</b>
Conceptualization	0.8 0.3 <b>46.4</b>
	0.3 <b>46.4</b>
Accelerator	46.4
Experimental Total	
English	154.3
French	75.9
Performance Envelope Subtotal	230.2
English	6.2
French	2.7
Development Envelope Subtotal	8.9
English Regional Production Bonus	13.1
Francophone Minority	11.5
Indigenous	8.7
English POV	4.6
Anglophone Minority	4.2
Diverse Languages	3.3
Québec French Regional Production Incentive	2.7
Early Stage Development	1.7
Predevelopment	1.7
Experienced Producers Pilot	1.5
Northern Incentive	1.2
CMF-Quebecor Fund Intellectual Properties Intended for International Markets Production Support	1.1
Québec French Regional Development	0.4
Convergent Total	294.7
Other Export Programs Total	3.4
Versioning	1.2
International Incentives Total	1.0
National Development Partnerships Total	0.6
Total	347.3

## SECTOR DEVELOPMENT SUPPORT

In 2020–2021, the CMF dedicated a portion of the budget to audiovisual sector development initiatives not addressed in the CMF's other funding programs.

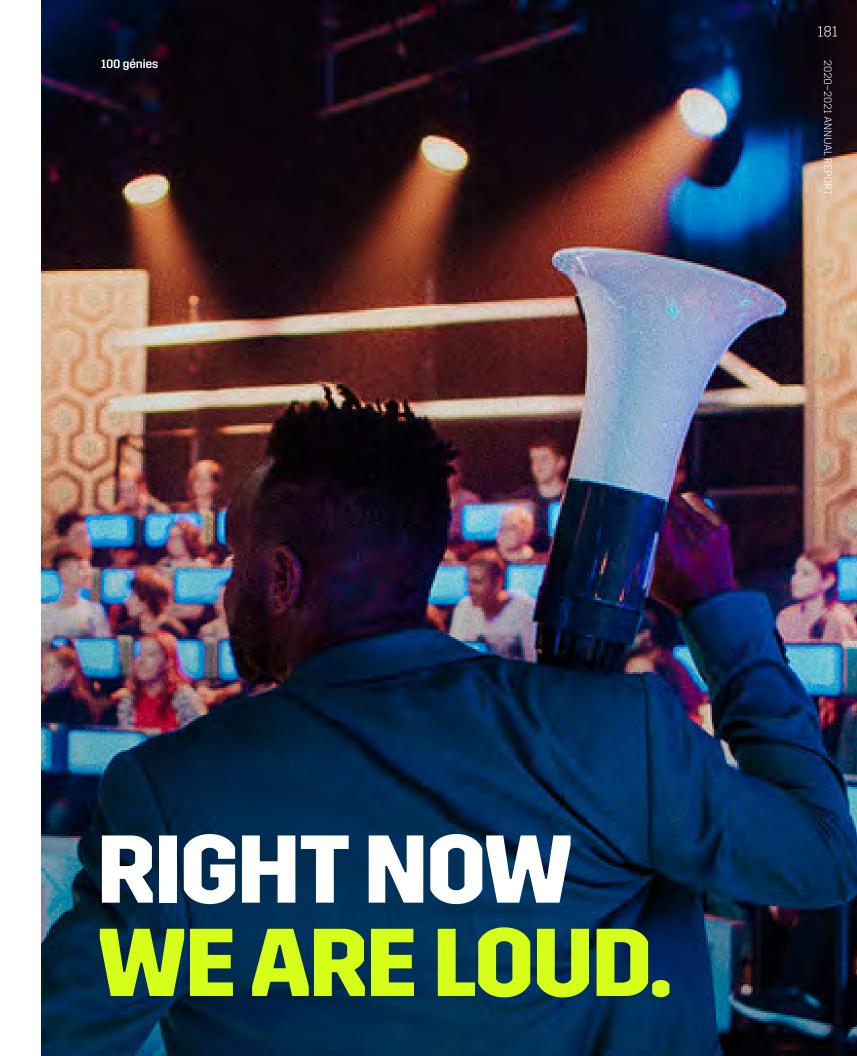
Sector Development funding is designed to support projects that have the potential to positively impact the diversity of Canada's audiovisual production ecosystem and address identified areas of improvement through activities such as: mentorship, training, professional development opportunities and capacity building.

Seven initiatives received a total of \$325K.



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Organization	Title	Area of Focus	Amount
Academy of Canadian Cinema & Television	Academy Directors Program for Women/Year 4	Gender Balance	\$20,000
Fondation Fabienne Colas	Being Black in Canada	Diversity	\$75,000
Women in View	Five in Focus: Indigenous	Gender Balance and Diversity	\$15,000
Inner Visions Productions Inc.	Diversity Writing Training and Skills Development	Diversity	\$50,000
Story Money Impact	SMI Pod	Regional, Discoverability	\$40,000
Independent Media Producers Association of Creative Talent (IMPACT)	IMPACT Initiative	Diversity	\$75,000
CreativePEI	Road to Production Masterclass Series 2021	Regional	\$50,000



The 2020–2021 fiscal year marked the 15th year the CMF and Telefilm Canada worked together on program administration.

The Services Agreement with Telefilm for the administration of CMF Program was first established in 2005–2006. This milestone was overshadowed by the fact that it was also the year of the pandemic.

The CMF Program Administrator, Telefilm Canada (CMFPA), received 1,815 applications in 2020–2021 in connection with the core CMF programs, 9% fewer than the previous year (1,995). Of the total number of such applications received, 1,326 were funded, down 11.6% from 2019–2020. The CMFPA also reviewed final costs of more than 1,210 files (up 8.4%), processed 2,452 disbursements and validated that more than 783 conditions, not related to a disbursement, were respected.

This slight downturn in number of files processed by the CMFPA in connection with the core CMF programs was more than compensated by activity in connection with

the administration of the dozen programs administered on behalf of the Government of Canada to help the industry during the COVID-19 pandemic by distributing more than \$90 million in Emergency Relief Funds. The CMFPA received 1,804 Emergency Relief Fund applications and contracted 1,550 of these applications, in addition to administering the traditional core CMF programs throughout the year.

In the Convergent and Experimental Streams combined, the CMFPA provided formal preapplication consulting services for 255 projects, as opposed to 201 in fiscal 2019–2020, so that producers could verify the eligibility of their projects prior to submitting an application.



## **Number of CMF Applications Approved** 2020–2021

	Total
Convergent Stream <sup>1</sup>	1,013
Development	493
Production	520
Versioning & Export	89
Export	54
Quebecor Fund-CMF Export	4
Versioning	31
International Incentives	21
Experimental Stream	183
Conceptualization	56
Prototyping	45
Limited Marketing and Promotion	9
Accelerator Partnership	9
IFP Short Form Development	20
Digital Linear Series	18
CMF-Shaw Rocket Digital Animated Series	10
Total	1,326

The current Administrative Service Levels targets were agreed upon for the main steps of the program administration process in 2018–2019 to provide a better indicator of turnaround times. These targeted service levels in terms of maximum processing days may be consulted in **Schedule A**. Overall, the CMPFA met these target services levels 60% of the time in 2020–2021, as opposed to 69% of the time in 2019–2020.

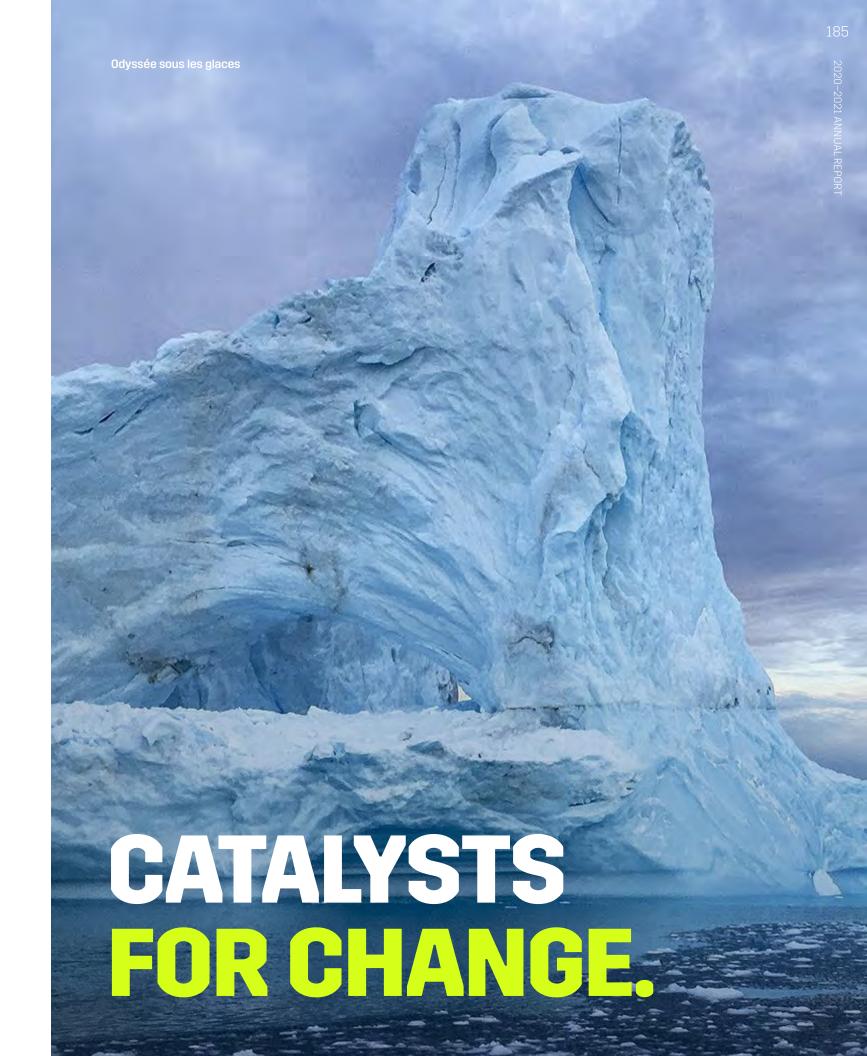
This 9% decrease in service levels can be explained by all of the additional services surrounding the Emergency Relief Funds that

were provided by the CMFPA in addition to its servicing of the core CMF programs. These additional services relating to the Emergency Relief Funds are not accounted for in the service levels reporting, and were provided at no additional cost.

The customary CMFPA outreach meetings across the country during the 2020–2021 fiscal year were held virtually because of the pandemic.

<sup>1</sup> Convergent Development includes: Creative BC-CMF Regional Predevelopment, Development Envelope, Early Stage Development, Experienced Producers Development, Francophone Miniority Development and Igenous Development, Northern Development, Predevelopment, Quebec French Regional Development, SODEC-CMF Predevelopment, Wildbrain-CMF Kids & Family Development

Convergent Production includes: Anglophone Minority Production, Diverse Languages Production, English POV, English Regional Production Bonus, Francophone Minority Production, Indigenous Production, Northern Production, Performance Envelope, Quebec French Regional Production and Quebecor-CMF IP Fund.



The main steps of the Program administration process are:

- 1. Eligibility: to assess eligibility of the application to the program
- 2. **Due diligence:** reasonable verification taken in order to ensure proper risk management and compliance for the purposes of contracting
- 3. Payment: first disbursement, amendment, rough cut or beta version and final cost. From reception of all required documents to payment
- **4. Amendment:** post-contracting amendment excluding final costs
- **5. Final costs:** final evaluation of the project based on the actual final costs





## MANAGEMENT DISCUSSION AND ANALYSIS

The review of the Corporation's financial position and operating results should be read in conjunction with the audited financial statements on the following pages. The results for 2020-2021 cover the period from April 1, 2020 to March 31, 2021 while the comparative numbers are for the period from April 1, 2019 to March 31, 2020.

## **Results of Operations**

### Revenue

The Corporation's revenue includes amounts from the broadcasting distribution undertakings (BDUs), the federal government through the Department of Canadian Heritage (Department), recoupment of production investments, repayments of advances, tangible benefits, and interest. Total revenue increased 27.1% or \$100.2M in the fiscal year, from \$369.4M in 2019-2020 to \$469.7M in 2020-2021.

Contributions from BDUs decreased 1.7% or \$3.3M in the fiscal year, from \$190.2M in 2019-2020 to \$186.9M in 2020-2021.

The federal government funding increased by 1.7% or \$2.7M in the fiscal year from \$157.8M in 2019-2020 to \$160.5M in 2020-2021. Starting in 2019-2020, the Government of Canada has increased its funding to the CMF to offset the decline in BDU contributions.

In response to the COVID-19 pandemic, the Department created the COVID-19 Emergency Support Fund for Cultural, Heritage and Sport Organizations ("Emergency Fund"). CMF recognized \$101.2M as revenue in 2020-2021.

Revenue from the recoupment of production investments increased 13.2% or \$0.9M in the fiscal year, from \$6.8M in 2019-2020 to \$7.7M in 2020-2021.

Revenue from repayment of advances increased 24.4% or \$1.1M in the fiscal year, from \$4.5M in 2019-2020 to \$5.6M in 2020-2021.

Tangible benefits that flowed directly to the CMF program under the revised CRTC Tangible Benefits Policy decreased by 7.7% or \$0.3M in the fiscal year, from \$3.9M in 2019-2020 to \$3.6M in 2020-2021.

Interest decreased by 50.9% or \$2.6M in the fiscal year, from \$5.3M in 2019-2020 to \$2.6M in 2020-2021.

CMF administers a tangible benefit program for WildBrain. \$1.0M was recognized as revenue in 2020-2021

Tangible benefits from Corus Entertainment of \$0.5M were recognized as revenue in 2020-2021.

### **Expenses**

Total expenses increased 27.6% or \$100.6M in the fiscal year, from \$364.8 in 2019-2020 to \$465.3M in 2020-2021. Program commitments represented 94.1% of total expenses, net of Emergency Fund, consistent with 2019-2020. The balance of the total expenses includes Emergency Fund industry support, program administration, general and administrative, sector development, industry partnerships, and amortization.

Under the terms of the Contribution Agreement with the Department of Canadian Heritage, CMF's total administrative expenses are capped at 6.0% of total revenue. In the fiscal year, the total administrative expenses were \$18.0M or 4.9% of total revenue, net of Emergency Fund, consistent with 2019–2020.

### **Program Commitments**

Total program commitments increased 0.1% or \$0.4M in the fiscal year, from \$342.2M in 2019-2020 to \$342.6M in 2020-2021. The CMF provides financial contributions to Canadian digital media and television producers primarily through two program streams: Convergent and Experimental. The Convergent Stream program commitments increased by \$0.1M, from \$294.7M in 2019-2020 to \$294.8M in 2020-2021. The Experimental Stream program commitments of \$46.4M were \$1.6M less than in 2019-2020. The program commitments for the international incentives were \$1.0M, \$4.6M supported exportrelated programs, and prior years' negative adjustments of about \$4.8M were also reflected in the fiscal year.

### **Emergency Fund Industry Support**

CMF allocated \$100.7M in audiovisual sector support and spent \$0.5M on COVID-19 Emergency Fund administration.

### **Program Administration Expenses**

The total program administration expenses decreased \$0.1M or 1.0% in the fiscal year, from \$10.4M in 2019–2020 to \$10.3M in 2020–2021. The CMF outsourced the program administration activities to Telefilm Canada through a services agreement; their service fee decreased by \$0.1M in the fiscal year from \$10.0M in 2019–2020 to \$9.9M in 2020–2021. Other program administration expenses of \$0.4M were consistent with 2019–2020.

### General and Administrative Expenses

General and administrative expenses of \$7.7M were consistent with 2019–2020.

### Industry Partnerships

Industry partnerships decreased by \$0.1M or 8.3% in the fiscal year, from \$1.2M in 2019-2020 to \$1.1M in 2020-2021. The CMF continued to partner with television and digital media events in Canada and internationally.

### **Sector Development**

Sector development expenditures decreased by \$0.6M or 27.3% in the fiscal year from \$2.2M in 2019–2020 to \$1.6M in 2020–2021. These activities support industry-related training, development, mentorship and promotion.

### **Cash Flow and Reserves**

BDU contributions are received monthly; the CMF invoices the Department monthly in arrears based on payments to producers. The Emergency Fund assistance was received in advance of payments to recipients. Repayment of advances are received throughout the year and the majority of recoupment of production investments is received twice a year.

The CMF invests funds not required for operations; investments are in federal treasury bills, provincial notes, GICs and term deposits. The Corporation's investments are drawn on as required to fund program obligations as they come due.

The CMF maintains unrestricted and restricted reserves. The funds in the reserves have accumulated over time through the excess of revenue over expenses and are used to support future years' programs.

At the end of the fiscal year, there was \$57.7M in restricted reserves and \$10.6M in unrestricted. At the end of 2019–2020, there was \$51.5M in restricted reserves and \$12.6M in unrestricted.

The restricted reserves at March 31, 2021 include amounts for the settlement of expenses in the event of dissolution of the CMF of \$5.0M, \$32.8M to support the 2021–2022 program budget, and a \$20.0M program funding contingency reserve.

### Forward Looking

Future legislative and regulatory changes are anticipated that could affect the CMF and its funding model. The pandemic continues, and the potential economic impact for the Corporation and the wider industry is unknown. Given these uncertainties, the CMF has taken a conservative approach in determining the budget for 2021–2022.

The CMF estimates revenue based on contributions from the Department, Canada's cable, satellite and IPTV distributors, and recoupment and repayment revenues from funded productions. In 2021–2022, it is assumed that contributions from BDUs will decline, but will be compensated by increased funding from the Government of Canada.

Based on the revenue estimates, the CMF determines a program budget. The 2021–2022 CMF program budget is \$364.0M: \$296.1M for the Convergent Stream, \$43.9M for the Experimental Stream, \$10.5M for Indigenous, \$5.8M for national partnerships, \$2.5M for international incentives, \$4.0M for diverse languages and \$1.2M for an export incentive.

COVID-19 Emergency Fund of \$19.0M will support the audiovisual sector in 2021–2022.

## CINITA MEDIA ELINID

## MANAGEMENT'S RESPONSIBILITY FOR FINANCIAL REPORTING

The financial statements of the Canada Media Fund (CMF) have been prepared by management and approved by the Board of Directors. The financial statements have been prepared in accordance with Canadian accounting standards for not-for-profit organizations. Management is responsible for the contents of the financial statements and the financial information contained in the annual report.

To assist management in the discharge of these responsibilities, the CMF has a system of internal controls over financial reporting designed to provide reasonable assurance that the financial statements are accurate and complete in all material respects.

The Board of Directors oversees management's responsibilities through an Audit Committee (Committee). The Committee meets regularly with both management and the external auditors to discuss the scope and findings of audits and other work that the external auditor may be requested to perform from time to time, to review financial information, and to discuss the adequacy of internal controls. The Committee reviews the annual financial statements and recommends them to the Board of Directors for approval.

CMF's external auditor, KPMG LLP (External Auditors), Chartered Professional Accountants, Licensed Public Accountants, have conducted an independent examination of the financial statements in accordance with Canadian generally accepted auditing standards, performing such tests and other procedures as they consider necessary to express an opinion in their Auditors' Report. The External Auditors have full and unrestricted access to management and the Committee to discuss findings related to CMF's financial reporting and internal control systems.

Valerie Creighton
President and CEO

Sandra Collins

Sunder COOL

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## CANADA MEDIA FUND

## FINANCIAL STATEMENTS OF CANADA MEDIA FUND

And Independent Auditors' Report thereon Year ended March 31, 2021

KPMG LLP Vaughan Metropolitan Centre 100 New Park Place, Suite 1400 Vaughan ON, L4K OJ3 Canada Tel 905-265-5900 Fax 905-265-6390

## **Independent Auditors' Report**

To the Board of Directors of Canada Media Fund

### Opinion

We have audited the financial statements of Canada Media Fund (the Entity), which comprise:

- the statement of financial position as at March 31, 2021
- the statement of operations for the year then ended
- the statement of changes in net assets for the year then ended
- the statement of cash flows for the year then ended
- and notes to the financial statements, including a summary of significant accounting policies

(Hereinafter referred to as the "financial statements").

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Entity as at March 31, 2021, and its results of operations and its cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

### **Basis for Opinion**

We conducted our audit in accordance with Canadian generally accepted auditing standards. Our responsibilities under those standards are further described in the "Auditors' Responsibilities for the Audit of the Financial Statements" section of our auditors' report.

We are independent of the Entity in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada and we have fulfilled our other ethical responsibilities in accordance with these requirements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

## Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is responsible for assessing the Entity's ability to continue as a going concern, disclosing as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Entity or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Entity's financial reporting process.

## Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error and to issue an auditors' report that includes our opinion.

Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with Canadian generally accepted auditing standards will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of the financial statements.

As part of an audit in accordance with Canadian generally accepted auditing standards, we exercise professional judgment and maintain professional skepticism throughout the audit.

We also:

- · Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion.
- · The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations or the override of internal control
- · Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances but not for the purpose of expressing an opinion on the effectiveness of the Entity's internal control.
- · Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- · Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Entity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditors' report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditors' report. However, future events or conditions may cause the Entity to cease to continue as a going concern.
- · Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- · Communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

KPMG LLP

**Chartered Professional Accountants, Licensed Public Accountants** 

Vaughan, Canada June 30, 2021

## Statement of Financial Position

(In thousands of dollars) | March 31, 2021, with comparative information for 2020

	2021	2020
Assets		
· Current assets:		
· Cash and cash equivalents	\$ 3,712	\$ 3,047
· Investments (note 4)	309,595	256,049
· Accounts receivable (note 3)	7,221	10,345
· Due from Department of Canadian Heritage	2,018	1,932
· Prepaid expenses	77	101
· Receivable – Corus (note 7(a))	_	97
	322,623	271,571
· Long-term investments (note 4)	15,002	_
· Capital assets (note 5)	133	168
	\$ 337,758	\$ 271,739
Liabilities and Net Assets		
· Current liabilities:		
· Accounts payable and accrued liabilities (note 6)	\$ 2,482	\$ 4,062
· Program commitments payable	247,350	203,001
· Program commitments payable – Corus	_	133
· Program commitments payable – WildBrain	412	_
· Deferred contributions – COVID-19 Emergency Fund (note 7(c))	19,015	_
· Deferred contributions – WildBrain (note 7(b))	_	263
	\$ 269,259	\$ 207,459
· Net assets:		
· Invested in capital assets	133	168
· Internally restricted net assets (note 8)	57,742	51,512
· Unrestricted	10,624	12,600
	\$ 68,499	\$ 64,280
· Commitments, guarantees and contingencies (note 11)		
	\$ 337,758	\$ 271,739

See accompanying notes to financial statements.

Chair Chair

Chair Audit Committee

## Statement of Operations

(In thousands of dollars) | Year ended March 31, 2021, with comparative information for 2020

	2021	2020
evenue:		
· Contributions from broadcasting distribution undertakings	\$ 186,850	\$ 190,182
· Contributions from Department of Canadian Heritage (note 1)	160,511	157,794
· Contributions from Department of Canadian Heritage – COVID-19 Emergency Fund (note 7(c))	101,235	_
· Recoupment of production investments	7,757	6,825
· Repayments of advances	5,587	4,518
· Other contributions – tangible benefits	3,594	3,848
· Interest	2,598	5,306
· WildBrain contributions – tangible benefits (note 7(b))	1,013	487
· Corus contributions – tangible benefits (note 7(a))	515	456
	\$ 469,660	\$ 369,416
xpenses:		
· Program commitments	342,609	342,155
· COVID-19 Emergency Industry Support (note 7(c))	101,235	_
· Program administration	10,326	10,410
· General and administrative	7,679	7,723
· Sector development	1,606	2,192
· Industry partnerships	1,148	1,190
· WildBrain program and administration (note 7(b))	780	487
· Corus program and administration (note 7(a))	-	456
· Amortization of capital assets	58	58
	\$ 465,441	\$ 364,671
xcess of revenue over expenses	\$ 4,219	\$ 4,745

See accompanying notes to financial statements.

## Statement of Changes in Net Assets

(In thousands of dollars) | Year ended March 31, 2021, with comparative information for 2020

					2021	2020
	Inve capital a	sted in assets	Internally restricted (note 8)	Unrestricted	Total	Total
Net assets, beginning of year	\$	168	\$ 51,512	\$ 12,600	\$ 64,280	\$ 59,535
Excess of revenue over expenses		(58)	-	4,277	4,219	4,745
Investment in capital assets		23	_	(23)	_	_
Transfer to internally restricted (note 8)		_	6,230	(6,230)	-	_
Net assets, end of year	\$	133	\$ 57,742	\$ 10,624	\$ 68,499	\$ 64,280

See accompanying notes to financial statements.

## Statement of Cash Flows

(In thousands of dollars) | Year ended March 31, 2021, with comparative information for 2020

	2021	2020
Cash flows from (used in) operating activities:		
· Excess of revenue over expenses	\$ 4,219	\$ 4,745
· Amortization of capital assets which does not involve cash	58	58
· Change in non-cash operating working capital:		
· Accounts receivable	3,124	(4,283)
· Due from Department of Canadian Heritage	(86)	(757)
· Prepaid expenses	24	(11)
· Accounts payable and accrued liabilities	(1,580)	169
· Program commitments payable	44,349	(8,319)
· Program commitments payable – Corus	(133)	(95)
· Program commitments payable – WildBrain	412	_
· Receivable – Corus	97	156
· Deferred contributions – WildBrain	(263)	263
· Deferred contributions – COVID-19 Emergency Fund	19,015	_
	\$ 69,236	\$ (8,074)
Cash flows from (used in) investing activities:		
· Purchase of capital assets	(23)	(29)
· Redemption (purchase) of investments, net	(68,548)	8,007
	\$ (68,571)	\$ 7,978
Increase (decrease) in cash and cash equivalents	665	(96)
Cash and cash equivalents, beginning of year	3,047	3,143
Cash and cash equivalents, end of year	\$ 3,712	\$ 3,047

See accompanying notes to financial statements.

(In thousands of dollars) | Year ended March 31, 2021

Canada Media Fund ("CMF") is incorporated as a corporation without share capital under the Canada Not-for-profit Corporations Act and is a non-profit organization under the Income Tax Act (Canada). The mandate of CMF is to foster, promote, develop and finance the production of Canadian content and relevant applications for all audiovisual media platforms.

CMF is governed by a Board of Directors, which consists of seven directors, who are nominated by two member organizations: (i) the Canadian Coalition for Cultural Expression, representing Canada's cable, satellite and internet protocol television distributors, which nominates five directors; and (ii) the Government of Canada, through the Department of Canadian Heritage (the "Department"), which nominates two directors.

CMF delivers financial support to the Canadian television and digital media industries through two streams of funding. The Convergent Stream supports the creation of convergent television and digital media content for consumption by Canadians anytime, anywhere. The Experimental Stream supports the development of innovative, interactive digital media content and software applications. Program administration is contracted to Telefilm Canada ("Telefilm").

## 1. Operations:

These financial statements comprise the financial position and results of operations of CMF.

CMF received \$160,511 of funding under a Contribution Agreement from the Department for the fiscal year ended March 31, 2021 (2020 – \$157,794).

CMF receives amounts from the broadcasting distribution undertakings ("BDUs"), which are mandated by the Canadian Radio-television and Telecommunications Commission ("CRTC") to contribute up to 4.7% of annual gross revenue derived from broadcasting activities to the production of Canadian programming.

CRTC monitors and enforces BDUs compliance with the contribution requirements of the Broadcasting Distribution Regulations.

## 2. Significant accounting policies:

The financial statements have been prepared in accordance with Canadian accounting standards for not-for-profit organizations in Part III of the Chartered Professional Accountants of Canada Handbook. Significant accounting policies are summarized below:

## (a) Revenue recognition:

CMF follows the deferral method of accounting for restricted contributions. Under the deferral method of accounting for contributions, restricted contributions related to expenses of future periods are deferred and recognized as revenue in the year in which the related expenses are incurred. Contributions from the Department, Corus Entertainment Inc. ("Corus") and WildBrain Ltd. ("WildBrain") are recognized as revenue in the year in which the related expenses are incurred and payable. Contributions from BDUs are recognized as revenue when received or receivable if the amount can be reasonably estimated and collection is reasonably assured.

Interest income is recognized when it is earned.

Recoupment of production investments and repayments of advances are recorded as revenue in the year in which the amounts are received or receivable.

Other tangible benefits contributions are recognized as revenue in the year in which they are received or receivable.

### (b) Program commitments:

Program commitments represent CMF's financial contributions to Canadian television and digital media projects.

Financial contributions are delivered through various forms of funding including licence fee top-ups, equity investments, recoupable investments, repayable advances, recoupable advances and non-recoupable contributions.

## CANADA MEDIA ELIND

## Notes to Financial Statements

(In thousands of dollars) | Year ended March 31, 2021

All forms of funding are expensed in the year in which CMF determines that the financial contribution to the project is approved. Some forms of funding may be recovered in the case of equity investments, recoupable investments, repayable advances, and recoupable advances, if certain criteria in the funding agreements are met. As the likelihood of the project achieving those criteria is uncertain, and the actual amount and timing of recovery of these types of funding is not determinable, or may never be recovered, no amount is recorded in the financial statements of CMF until the criteria have been met and the amounts are known.

In certain instances, the actual amounts paid differ from the original commitment. Adjustments for these differences are recorded when determined. During the year, an aggregate of \$4,823 (2020 – \$6,102) of adjustments relating to funding commitments made in prior years were recorded in program commitments expense.

### (c) Capital assets:

Capital assets of CMF are recorded at cost less accumulated amortization. Amortization is provided on a straight-line basis over the assets' estimated useful lives as follows:

Equipment	20% - 30%
Office furniture and fixtures	20%
Leasehold improvements	Term of lease

Software costs are expensed as incurred.

## (d) Cash and cash equivalents:

CMF's policy is to present bank balances under cash and cash equivalents.

### (e) Financial instruments:

CMF initially measures its financial assets and financial liabilities at fair value. It subsequently measures all its financial assets and financial liabilities at amortized cost, except for investments that are measured at fair value. Changes in fair value are recognized in the statement of operations. CMF has irrevocably elected to carry all of its financial investments at fair value.

Financial assets subsequently measured at amortized cost include accounts receivable and due from the Department. Financial liabilities subsequently measured at amortized cost include accounts payable and accrued liabilities and program commitments payable.

Financial instruments measured at amortized cost are adjusted by financing fees and transaction costs. All other transaction costs are recognized in excess (deficiency) of revenue over expenses in the year incurred.

Financial assets are assessed for impairment on an annual basis at the end of the fiscal year if there are indicators of impairment. If there is an indicator of impairment, CMF determines if there is a significant adverse change in the expected amount or timing of future cash flows from the financial asset. If there is a significant adverse change in the expected cash flows, the carrying amount of the financial asset is reduced to the highest of the present value of the expected cash flows, the amount that could be realized from selling the financial asset or the amount CMF expects to realize by exercising its right to any collateral. If events and circumstances reverse in a future period, an impairment loss will be reversed to the extent of the improvement.

## (f) Allocation of general and administrative expenses:

CMF does not allocate expenses between functions on the statement of operations.

### (g) Use of estimates:

The preparation of financial statements requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses during the year.

(In thousands of dollars) | Year ended March 31, 2021

## 3. Accounts receivable:

	2021	2020
Accounts receivable	\$ 7,321	\$ 10,495
Less allowance for doubtful accounts	100	150
	\$ 7,221	\$ 10,345

## 4. Investments:

	2021	2020
Provincial promissory notes	\$ 161,026	\$ 128,036
Term deposits	95,105	62,277
Guaranteed investment certificates	68,466	50,737
Government of Canada treasury bills	-	14,999
	\$ 324,597	256,049
Less short-term investments	309,595	256,049
Long-term investments	\$ 15,002	\$ -

Financial investments include provincial promissory notes, term deposits, guaranteed investment certificates and Government of Canada treasury bills. Investments with term to maturity of one year or less of \$309,595 (2020 – \$256,049) are recorded as current assets. Investments with term to maturity of more than one year of \$15,002 (2020 – nil) are recorded as long-term investments.

## 5. Capital assets:

				2021		2020
	Cost	 nulated tization	N	et book value	N	et book value
Equipment	\$ 135	\$ 102	\$	33	\$	48
Office furniture and fixtures	22	18		4		6
Leasehold improvements	264	168		96		114
	\$ 421	\$ 288	\$	133	\$	168

## **6. Government remittances:**

Included in accounts payable and accrued liabilities are government remittances payable of \$21 (2020 - \$15), which includes amounts payable for payroll-related taxes.

## 7. Administration agreements:

(a) CMF entered into a long-term agreement with Corus on April 10, 2014 to administer the Export Fund and the Script and Development Initiative funded by Corus. The receivable represented restricted funding earned and receivable from Corus as at year-end.

	2021	2020
Receivable – Corus, beginning of year	\$ 97	\$ 253
Amount received during the year	(612)	(612)
Amount recognized as revenue in the year	515	456
Receivable - Corus, end of year	\$ _	\$ 97

During the year, CMF expensed nil (2020 – \$433) for the program commitments and nil (2020 – \$23) for the program administration. The agreement terminated on August 30, 2020 and unspent funding in the amount of \$515 was recognized as revenue in the year.

(In thousands of dollars) | Year ended March 31, 2021

(b) CMF entered into an agreement with WildBrain on May 13, 2019 to administer the Family and Children's Development Program funded by WildBrain. The deferred contributions represented unspent restricted funding that is related to revenue and expenses of future years.

	2021	2020
Deferred contributions – WildBrain, beginning of year	\$ (263)	\$ _
Amount received during the year	(750)	(750)
Amount recognized as revenue in the year	1,013	487
Deferred contributions – WildBrain, end of year	\$ _	\$ (263)

During the year, CMF expensed \$743 (2020 – \$464) for the program commitments and \$37 (2020 – \$23) for the program administration. The agreement terminated on March 31, 2021 and unspent funding in the amount of \$233 was recognized as revenue in the year.

(c) In response to the COVID-19 pandemic outlined in note 9(d), the Department created the COVID-19 Emergency Support Fund for Cultural, Heritage and Sport Organizations. CMF entered into a Contribution Agreement with the Department to distribute \$120,250 in temporary funding support to the audiovisual sector to help the sector manage the financial challenges of the pandemic. The Contribution Agreement expired on June 30, 2021.

	:	2021	2020
Deferred contributions – COVID-19 Emergency Fund, beginning of year	\$	_	\$ _
Amount received during the year	(120	,250)	_
Amount recognized as revenue in the year	10:	1,235	_
Deferred contributions - COVID-19 Emergency Fund, end of year	\$ (19	,015)	\$ _

During the year, CMF expensed \$100,676 (2020 – nil) in audiovisual sector support and \$559 (2020 – nil) for the COVID-19 Emergency Fund administration.

## 8. Internally restricted net assets:

	Balance March 31, 2020	Transfers	Balance March 31, 2021
Settlement of CMF operational expenses in the event of dissolution of its operations	\$ 4,971	\$ -	\$ 4,971
Program funding 2020–2021	13,222	(13,222)	_
Program funding 2021–2022	-	32,771	32,771
Program funding contingency reserve	32,548	(12,548)	20,000
French programming	771	(771)	_
	\$ 51,512	\$ 6,230	\$ 57,742

The Board of Directors ("Board") set aside amounts for specific purposes which are not available for other purposes without prior approval from the Board.

The Board approved the transfer of 32,771 (2020 - 13,222) from unrestricted to restricted net assets to provide additional funding for program commitments for fiscal 2021-2022 (2020 - for fiscal 2020-2021).

The Board approved the decrease of \$12,548 to program funding contingency reserve (2020 – increase of \$3,548).

The Board approved the transfer of nil to French programming from program funding contingency reserve (2020 – \$771).

(In thousands of dollars) | Year ended March 31, 2021

## 9. Financial instruments and risk management:

CMF is exposed to various risks through its financial instruments. The following analysis presents CMF's exposure to significant risk at March 31, 2021:

## (a) Liquidity risk:

Liquidity risk is the risk of being unable to meet cash requirements or fund obligations as they become due. CMF manages its liquidity risk by constantly monitoring forecasted and actual cash flows and financial liability maturities and by holding financial assets that can be readily converted into cash. All of CMF's investments are considered to be readily realizable as they can be quickly liquidated at amounts close to their fair value. There has been no change to risk exposure from 2020.

## (b) Credit risk:

Credit risk refers to the risk that a counterparty may default on its contractual obligations resulting in a financial loss and when a financial instrument is affected by a credit rating or other measure of credit quality. CMF is exposed to credit risk with respect to accounts receivable. CMF assesses, on a continuous basis, accounts receivable on the basis of amounts it is virtually certain to receive. CMF is also exposed to credit risk with respect to its investments. CMF's concentration of credit risk by credit rating is as follows:

Credit rating	2021	2020
R-1 (high)	\$ 191,752	\$ 211,397
R-1 (mid)	132,845	44,652
	\$ 324,597	\$ 256,049

Credit ratings are obtained from Dominion Bond Rating Service credit rating agency.

## (c) Interest rate risk:

Interest rate risk is the risk to CMF's earnings that arise from fluctuations in interest rates and the degree of volatility of these rates. CMF is exposed to interest rate risk and its effect on interest income. The risk is low since interest income is not a major component of total revenue.

Fixed income securities have yields varying from 0.13% to 0.90% (2020 – 0.60% to 2.43%) with maturity dates ranging from April 5, 2021 to May 24, 2022 (2020 – April 2, 2020 to February 16, 2021). The value of fixed income securities will generally rise if interest rates fall and fall if interest rates rise. The value of the securities will vary with developments within the specific companies or governments which issue the securities. There has been no change to risk exposure from 2020.

### (d) Industry risk:

CMF operates in the Canadian television and digital media industry and is impacted by general economic trends. In March 2020, the COVID-19 outbreak was declared a pandemic by the World Health Organization. This has resulted in the Canadian government enacting emergency measures to combat the spread of the virus. The situation is dynamic and the ultimate duration and magnitude of the impact on the economy and the financial effect on CMF is not known at this time.

## 10. Related party transactions and balances:

There were no program commitments funded during the current and prior year to production companies who are related to CMF by virtue of their direct or indirect membership on CMF's Board of Directors.

(In thousands of dollars) | Year ended March 31, 2021

## 11. Commitments, guarantees and contingencies:

(a) CMF is committed to rental payments of \$528 for its leased premises expiring on July 31, 2023.

	\$ 528
2024	72
2023	213
2022	\$ 243

In relation to these leases, CMF has agreed to indemnify the landlord against all expenses, damages, actions, claims or liabilities arising from any default under the leases or from CMF's use or occupation of the leased premises.

- (b) CMF is committed to payments of \$11,294 for program administration services provided by Telefilm under a services agreement expiring on March 31, 2022. Pursuant to the services agreement, in the event of termination, CMF is committed to pay additional expenses that would be incurred to wind-down the provision of services by Telefilm.
- (c) CMF has indemnified its past, present and future directors, officers and employees ("Indemnified Persons") against expenses (including legal expenses), judgments and any amount actually or reasonably incurred by them in connection with any action, suit or proceeding in which the Indemnified Persons are sued as a result of their service, if they acted honestly and in good faith with a view to the best interests of CMF. The nature of the indemnity prevents CMF from reasonably estimating the maximum exposure. CMF has purchased directors' and officers' liability insurance with respect to this indemnification.

In its services agreement with Telefilm, CMF has indemnified Telefilm and its directors, officers, employees, agents and other representatives from and against any claims, demands, actions, judgments, damages, losses, liabilities, costs or expenses that they may suffer or incur relating to, or caused by, the proper performance by Telefilm of its services under the agreement, any breach by CMF of the agreement, injury to person or property attributable to the negligent acts or omissions or wilful misconduct of CMF, or any failure by CMF to comply with applicable laws relating to the services. A reciprocal indemnification has been provided to CMF by Telefilm in the services agreement. CMF has contract liability coverage for this indemnification in its commercial general liability insurance.

(d) The CRTC issued Decision 2020-356 which directs Bell Canada to contribute at least 80% of \$17,925 to the CMF before the expiry of Bell Canada's licence on August 31, 2024. These amounts are currently under discussion. These compliance adjustments will be recognized in revenue when received.



## ANADA MEDIA FUND

## NOTICE

The Canada Media Fund's 2020–2021 Annual Report is published to share important industry information with its stakeholders. The report includes detailed information on the results of CMF funding for the 2020–2021 fiscal year, from April 1, 2020 to March 31, 2021.

The report also includes an analysis of Canadian audiences for the 2019–2020 broadcast year in television and the fiscal year 2020–2021 for digital media. References to awards, sales and other forms of recognition feature productions that achieved these successes in 2020 or 2021 (unless noted otherwise), but may have been funded by the CMF prior to 2020–2021.

Statistics presented are as at the CMF year-end and are subject to change. As a result, a small number of funding agreements that were not yet

signed at the time of publication of this report have been included within the dataset. Figures in this document have been rounded. Shares depicted in data tables have been rounded to one decimal place, hence, where a share of 0% is indicated, activity less than 0.1% may have been present.

The CMF is committed to providing accurate, transparent and timely information to its stakeholders. If you have any questions about the data in this report, please contact us.



## TELEVISION AUDIENCE DATA SOURCES

## Introduction

The Canada Media Fund has developed a method of tracking the performance of all programs funded by the CMF since its inception and captured within the Numeris databases. This methodology has been executed using title-matching algorithms developed by the CMF in conjunction with MediaStats and the independent consulting firm Figurs. While the information generated from this process is not yet available as a syndicated database to Numeris subscribers, it is available in the form of aggregated data outlined in the CMF Annual Report.

### **Data Source**

Data for the 2019–2020 broadcast year, as well as the historical data from 2015–2016 through to 2018–2019 broadcast years (and non-displayed data going back to 2005–2006), was sourced from Numeris data measurement systems.

## **Metrics**

The audience data upon which these charts were based have been derived from the 2019–2020 broadcast year (Weeks 1–53, August 26, 2019 to August 30, 2020), Total Canada, Persons 2+, average minute audiences (000) converted to total hours. The analysis used program-level data to calculate viewing levels by country of origin and genre.

This data also incorporates Numeris On-Demand Measurement (ODM) which tracks consumption of video content available through set-top box VOD services or broadcaster websites but

does not currently include SVOD and other OTT services. ODM figures are aggregated into total hours tuned and only for full-day viewing. ODM viewing adds approximately 0.98% to total hours tuned for English stations, and 0.54% for French stations.

## **Full Day**

Full day is the equivalent of Monday to Sunday, from 2 am to 1:59 am.

## **Peak Viewing Hours**

In all aspects of this report, peak viewing was based on viewing of programs with start times falling between 7 pm and 10:59 pm, and end times falling between 7 pm and 11 pm.

## **Definition of CMF-Funded Programming**

Viewing of CMF-funded programming was based on viewing of English-language stations or French-language stations. These results account for any project, past and present, to which the CMF (and formerly CTF) has contributed financing. It is important to note that Numeris does not currently identify individual telecasts by cycle number. It is therefore impossible to delineate which specific airing of a project may or may not have been funded. Due to these limitations in the Numeris dataset, CMF-funded projects for the purpose of this analysis included all cycles/years for projects financed by the CMF, even if only select cycles/years of the project were funded.

## **Data Universe**

## English

For all charts provided, audience data to English-language television was based on the cumulative audiences of the following broadcasters:

A&E	Cooking Channel	Disney JR
ABC Spark	Cosmo TV	Disney XD
Adult Swim	Cottage Life	DIY Network
AMC	CP24 Ontario	Documentary
AMI-tv	CPAC	DTOUR
Animal Planet	Crave 1&4	E!
APTN HD	Crave 2	Family Jr.
APTN-E	Crave 3	Family
APTN-W	Crime + Investigation	Fight
BBC Canada	CTV Comedy	Food Network
BBC Earth	CTV Drama	FOX News US
Cartoon Network	CTV Life	FX
CBC News Network	CTV News Channel	FXX
CBC	CTV Sci-Fi	FYI
CHCH	CTV Total	Game TV
CHEK	CTV2 Alberta	Global BC (CHAN/CHBC)
CHRGD	CTV2 Barrie/Tor (CKVR)	Global Calgary (CICT/CISA)
Citytv Calgary (CKAL)	CTV2 Ontario	Global Edmonton (CITV)
Citytv Edmonton (CKEM)	CTV2 Total	Global Ontario (CIII)
Citytv Montreal (CJNT)	CTV2 Vancouver (CIVI)	Global Quebec (CKMI)
Citytv Ontario (CITY)	 DejaView	Global Total
Citytv Total	Discovery Science	H2
Citytv Vancouver (CKVU)	Discovery Velocity	HBO Canada
CMT	Discovery	HGTV
CNN	Disney Eng	History

IFC	OMNI 2 Ontario (CJMT)	TSN2
Investigation Discovery	OMNI BC (CHNM)	TVO
Joytv BC (CHNU)	OMNI Calgary (CJCO)	VisionTV
KAYU	OMNI Edmonton (CJEO)	W Network
KCTS	OWN	WCAX
KHQ	Paramount Network	WCFE
Knowledge Network BC (CKNO)	PeachtreeTV	WCVB
KOMO	Showcase	WDIV
KREM	Slice	The Weather Network*
KSPS	Sportsnet East	WETK
KSTW	Sportsnet National	WFFF
KVOS	Sportsnet Ontario	WGRZ
KXLY	Sportsnet Pacific	WIVB
Lifetime	Sportsnet West	WKBW
Love Nature	Sportsnet 360	WNED
Makeful	Sportsnet ONE	WNLO
MovieTime	STARZ1	WNYO
MTV	STARZ2	WPTZ
MUCH	T+E	WUTV
Nat Geo Wild	Teletoon English	WVNY
National Geographic	TLC	YES TV Calgary (CKCS)
Nickelodeon	TLN	YES TV Edmonton (CKES)
OLN	Treehouse	YES TV Toronto (CITS)
OMNI 1 Ontario (CFMT)	TSN	YTV

The above broadcasters have provided their weekly program schedules to Numeris, and has reported these broadcasters' viewing audiences by program for Total Canada during the 2019–2020 broadcast year. The aggregate viewing across Canada to the above list of stations represented 96.1% of all viewing of English stations reported by Numeris.

<sup>\*</sup> Indicates broadcaster did not submit specific program/episode lineup to Numeris, despite being present in program-level analyses on nLogic/Nielsen software.

## CANADA MEDIA FUNI

### French

For all charts provided, audience data to French-language television was based on the cumulative audiences of the following broadcasters:

addikTV	MAX	Télémagino
AMI-télé	MétéoMédia*	Télétoon (langue française)
Canal D	M0I&cie	TFO
Canal Vie	Noovo (total)	Télé-Québec
CASA	Prise2	TV5
Cinépop	RDS Info	TVA Sports
Évasion	RDS	TVA Sports 2
Historia	RDS2	TVA
ICI ARTV	Séries Plus	Unis TV
ICI Explora	SRC	VRAK
ICI RDI	Super Écran 1	Yoopa
Investigation	Super Écran 2	Z
La chaîne Disney	Super Écran 3	Zeste
LCN	Super Écran 4	

<sup>\*</sup> Indicates broadcaster did not submit specific program/episode lineup to Numeris, despite being present in program-level analyses on nLogic/ Nielsen software.

The above broadcasters have provided their weekly program schedules to Numeris, and Numeris has reported these broadcasters' viewing audiences by program for Total Canada during the 2019–2020 broadcast year. The aggregate viewing across Canada to the above stations represented 99.1% of all viewing of French-language stations reported by Numeris.

## What's Missing?

While the CMF audience analysis is based on a relatively complete viewing universe of linear platforms in the French market (99.1%, as above), the viewing universe for the English market is marginally understated (96.1%, as above).

## The missing components of this universe include:

- viewing of Canadian stations/networks not reported at the program level in Numeris audience databases; this would include some digital networks
- viewing of Canadian independent small market stations not captured in Numeris metered data systems, and viewing of nonnetwork programming on stations affiliated with a conventional network (i.e., regional preemptions, specials, etc.)
- viewing of some smaller-market US and specialty channels

Note that the missing components as described above do not include viewing of SVOD, streaming or over-the-top (OTT) services, or long-form programming available on internet-native MCNs such as YouTube. Viewing on these platforms is estimated to be over 30% of overall consumption and is not currently calculated in the viewing universe. Numeris is piloting its cross-platform video audience measurement (VAM) solution that will measure these nonlinear services, although the full implementation of its national dataset is not scheduled to be complete until mid-2023.

## **Country of Origin and Genres**

## For CMF-funded programming:

- Country of origin, in all cases, was considered to be Canadian (regardless of whether it was a treaty coproduction or not).
- Genres included were Children's & Youth,
   Documentary, Drama, or Variety & Performing
   Arts, depending upon the CMF eligibility
   requirements the program was funded under.

## For all other programming:

Country of origin and genres were based on those provided via Numeris audience databases through the CMF Country of Origin and Genre Initiative, funded exclusively by the CMF and administered by Mediastats with participation from the CRTC, Numeris and many broadcasters.

It is important to note that genre codes provided in Numeris audience databases adhere to CRTC genre definitions, and do not perfectly align with CMF genre definitions. For the purposes of this report, the following applies:

- The Children's & Youth category\* is comprised of the following genres as per CRTC classification:
- 5A Formal Education and Pre-School
- 7A Ongoing Drama Series
- 7B Ongoing Comedy Series
- 7C Specials Minis MOWS
- 7E Animation
- 7F Sketch Comedy/Comedy Other
- 7G Other Drama

<sup>\*</sup> For further clarification, see "Determination of Children's & Youth Programming."

- The Documentary category is comprised of the following genres as per CRTC classification:
- 2A Analysis and Interpretation
- 2B Long-Form Documentary
- The Drama category\* is comprised of the following genres as per CRTC classification:
- 7A Ongoing Drama Series
- 7B Ongoing Comedy Series
- 7C Specials Minis MOWS
- 7E Animation
- 7F Sketch Comedy/Comedy Other
- 7G Other Drama
- The Variety & Performing Arts category is comprised of the following genres as per CRTC classification:
- 8A Music & Dance
- 9 Variety

## Determination of Children's & Youth Programming

With the exception of the CRTC genre "5A Formal Education & Pre-School," there are no obvious genre designations for Children's & Youth programming. Yet, clearly, many programs are produced and broadcast in this country with the intent of targeting and reaching young audiences. For the purposes of this report, all programming in the following CRTC genres were categorized as either Drama or Children's & Youth depending on the actual average demographic composition of programs falling in these genres.

- 7A Ongoing Drama Series
- 7B Ongoing Comedy Series
- 7C Specials Minis MOWS
- 7E Animation
- 7F Sketch Comedy/Comedy Other
- 7G Other Drama

If more than 50% of the average audience (i.e., all telecasts averaged together) for any program falling in the above CRTC genres were aged 2–17, the program was categorized as Children's & Youth. If more than 50% of the average audience for a program were aged 18+, it was categorized as Drama.

All other CRTC genres were considered to be "Other."

The data provided in the Digital Media section of the audience report covers the fiscal year from April 1, 2020 – March 31, 2021.

## Passive Tagging via Adobe Analytics

All data reported in this Annual Report was collected using the Adobe Analytics tagging solution during April 1, 2020 through March 31, 2021. This report exclusively measures the activity to Rich and Substantial Digital Media projects that received Production financing from the CMF.

## Challenges of accurate data measurement

In most cases, Convergent Stream projects are designed for audiences using website platforms (vs. mobile applications). In terms of supported content types, a larger portion of Convergent Stream projects have mostly been funded and classified as Rich Interactive Media experiences. These projects have been correctly tagged at the site level, collecting visits to everything that supports the Rich Interactive Media content type.

Experimental Stream projects, due to the limitations of platform type and other technical challenges, are mostly games and video being collected through other third-party analytic tools such as Steam, console platforms and YouTube. Challenges include assessing the utility of each of the measurement tools as well as evaluating the accuracy of aggregating data coming from a

variety of different sources. When a CMF project is unable to be tagged with Adobe Analytics, the CMF will continue to accept other viable sources of data for Experimental projects.

Due to the method in which the Adobe Analytics tag is implemented, only total visits and total unique visitors, within each language and content type, will represent the base metrics captured in the data for both funding Streams.

For those projects in both funding streams that are unable to implement the new Adobe tag, the CMF will collect this data through the creation of an Audience Success online self-reporting tool. This tool distinguishes the types of tools used, the types of metrics for each and how the CMF can best measure it.

## Definition of CMF-Funded Digital Media Metrics

**Sessions/Visit:** The number of sessions within a given time period. A visit is defined as a sequence of consecutive page views without a 30-minute break, or continuous activity for 12 hours.

**Unique Visitors:** Refers to a visitor who visits a site for the first time within a specified time period.

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Digital Media Data Sources

<sup>\*</sup> For further clarification, see "Determination of Children's & Youth Programming."

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## Definition of CMF-Funded Digital Media Delivery Methods & Content Types

### **Delivery Methods**

**Application:** Can be either a mobile app (includes both a content and code to consume it) or a software (i.e., a purely technological product without any included content). Both require an installation to deliver the content or perform a task.

**Downloadable:** Fixed package that can be consumed later without an internet connection. Requires the installation of an application that may or may not be part of the project.

**Physical support:** Any tangible storage method. Requires a manufacturing process and, usually, a specific reading device.

**Streaming:** Fixed package that must be consumed as it is streamed, and requires a connection and the installation of an application that may or may not be part of the project.

**Website:** The content of the project is delivered via an internet connection through a web browser, regardless of the device used to deliver it.

## **Content Types**

**eBook:** Digital presentation of a physical book or original creation. Requires rich and substantial audiovisual and interactive elements to be eligible for CMF funding.

**Game:** Multimedia content that requires high level of interaction from the user to complete the experience. Sets apart from other rich interactive media projects by including a combination of rules, progression, rewards and/or other "playing features".

Rich interactive media (Inclusive): Multimedia content that combines story telling with visual technologies where user participation and interactivity are successfully met through a fully rich immersive experience. Inclusive experiences usually begin on a single linear path, using levels to advance to a predetermined destination or goal.

### Rich interactive media (Non-Inclusive):

Multimedia content that combines visual technologies is, however, not structured to tell a complete story. Non-Inclusive experiences require user participation and interactivity that is non-linear. The experience may also be segmented into unrelated, multiple content types (CMF-eligible).

**Social media:** Real-time creation and exchange of user-generated content on a dedicated platform, involving a "many-to-many" approach.

### Software (Experimental Stream Only):

Application software that is innovative and interactive, and is connected to the Canadian cultural sector.

**Video:** Moving images with or without sound, where limited interaction options are offered to the user.

Web series: Web series are two or more related episodes of (Linear or Interactive) video content that originate on the web. Specifically for the Web Series Program, a "series" shall be defined as at least three related episodes of linear video content, and of at least two minutes in duration per episode.



