

**CMF Genre Report:
Children and Youth and One-Off Documentary**

September 19, 2024

Disclaimer

This report was originally prepared for internal purposes by the Analytics and Strategic Insights Department and does not necessarily represent the policy or position of the CMF.

The research for this report was conducted in summer 2024. At the time, CMF funds could only be triggered by a Canadian broadcaster. In October 2024, after the survey was conducted and the report shared internally, the CMF announced a Distributor Program, which allows financial contributions from eligible Canadian distributors to solely unlock CMF funding.

Table of Contents

Disclaimer	2
Table of Contents	3
List of Figures.....	5
Executive Summary.....	6
Chapter 1: Introduction	9
Mandate	9
Research Methodology	9
Background.....	9
CMF vs Industry Growth.....	10
Key Findings	11
Report Structure.....	13
Chapter 2: Children/Youth	14
Secondary Data Analysis: Canary in the Coal Mine	14
Global	14
Canada	14
Results from the Children/Youth Producers Survey	18
Basic Data.....	18
Culture and Diversity.....	19
Budgets.....	19
Target Audiences	20
Financing and Triggers.....	21
Copyright Ownership	25
Canada Media Fund.....	26
Canadian Consumers Weigh In: Why Children/Youth Content Matters.....	27
Key Takeaways from the Children/Youth Research	28
Chapter 3: One-Off Documentaries.....	30
Secondary Data Analysis: Boom and Gloom	30
Global	30
Canada	31
Results from the Documentary Producers Survey.....	34
Basic Data.....	34
Culture and Diversity.....	35
Budgets.....	35

One-Offs vs Series	36
POV Program	37
Financing and Triggers.....	37
Copyright Ownership	40
Canada Media Fund	41
Key Takeaways from the Documentary Research	42
Chapter 4: Observations and Considerations	44
Three Considerations	44
Conclusion	46
Appendix A: Methodology	47
Endnotes	49

List of Figures

- Figure 1: Volume of Canadian CY and Doc TV Production by Genre (\$M), 2013–14 to 2022–23 10
- Figure 2: CMF Contribution to CY and Doc TV Production (\$M), 2013–14 to 2022–23..... 11
- Figure 3: Agree or disagree with the statement: “The Canadian content system does not reflect the maturity and world-class excellence of the Canadian production sector [and] ...is out of step with evolving financing models.” 12
- Figure 4: Total Canadian Programming Expenses, Children/Youth Channels, 2018 to 2023..... 15
- Figure 5: Broadcaster-Reported THT (000), Children/Youth Channels, 2013–14 to 2022–23; Cord-cutters/Cord-nevers in Canada, 2013 to 2020; Timeline of Key Streaming Events, 2010 to 2023 16
- Figure 6: CMF Genre Allocation Targets and Results, CY, 2020–21 to 2024–25..... 16
- Figure 7: CMF Genre Outcomes vs 2024–25 Target, CY, 2013–14 to 2023–24..... 17
- Figure 8: How many children/youth projects for linear TV, streamers, and/or ungated platforms has your company produced and developed in the last 10 years (2013–14 to 2023–24), whether or not supported by the CMF? (A series counts as one project.) 18
- Figure 9: How important is it for children/youth content to help preserve language and reflect cultural identity?..... 19
- Figure 10: Average Production Budget and Average Budget Components for CMF-Funded CY Projects, 2019–20 to 2023–24 20
- Figure 11: Top three priorities for securing financing for children/youth productions, excluding tax credits and the CMF 22
- Figure 12: Which potential flexibility, in terms of eligibility for CMF funding, would be most useful for your company’s ability to develop or produce children/youth projects? 24
- Figure 13: In general, how effectively does the CMF’s current funding structure serve children/youth producers? (All respondents)..... 26
- Figure 14: How important is it to you that Canadian-made content for young people is available on television and digital platforms? 28
- Figure 15: Broadcaster-Reported THT (K), Documentary Channels, 2013–14 to 2022–23..... 32
- Figure 16: Total number of CMF projects and total production volume (\$M) in one-off documentaries, 2014–15 to 2023–24 32
- Figure 17: CMF Genre Allocation Targets and Results, Documentaries, 2020–21 to 2024–25..... 33
- Figure 18: CMF Genre Outcomes vs 2024–25 Target, Documentary, 2013–14 to 2022–23..... 33
- Figure 19: How important is documentary filmmaking in serving as an entry point for new and underrepresented filmmakers?..... 35
- Figure 20: Which format (one-off or series) lends better to author-driven, culturally relevant topics?.... 36
- Figure 21: POV Program 2019–20 to 2023–24 37
- Figure 22: Which sources are your top three priorities for securing financing for documentaries, excluding tax credits and the CMF? 37
- Figure 23: Which potential flexibility, in terms of eligibility for CMF funding, would be the most useful for your ability to finance one-off, auteur point-of-view documentary projects?..... 40
- Figure 24: When creating documentary series, how would you view an expansion of the CMF’s list of eligible content to include “how to,” “lifestyle,” and “reality”? 41
- Figure 25: Survey Response Breakdown 48

Executive Summary

Motivated by data and industry calls, this research takes a deep dive into two genres, Canadian children/youth (CY) and documentary. The mandate was to determine how and why CMF participation in these two genres has changed, to analyze causes of the change, to explore why producers are moving outside the Canadian ecosystem, to identify what remedies are viewed as priority, and to suggest potential solutions.

The mandate arose in response to compelling evidence that, contrary to overall growth of the Canadian television industry in the last decade, the CMF's participation has decreased in CY and one-offs, a sub-section of the documentary genre. Given the CMF's mandate from the Department of Canadian Heritage (PCH) to support drama, documentary, CY, and variety and performing arts (VAPA), this shift calls for a closer examination of how the CMF can best support producers, consumers, and broadcasters in these two arenas.

The CMF was founded in 2010, the same year Netflix's streaming service was launched in Canada. With streaming popularity accelerating since then, the CMF has been working to support the industry within a set of parameters:

- (1) BDU funding: At its inception, about half of the CMF's funding came from broadcasting distribution undertakings (BDUs), who allocate five percent of their broadcasting revenues, of which a portion is directed to the CMF. As linear broadcasting declines, BDU contributions to the CMF have dropped to around 40% and in 2023–24, they fell to 39.76%. Since 2018–19, PCH has supplemented CMF funding to address this shortfall, to a maximum of \$42.5M per year. While previous years did not reach the limit, the CMF is now receiving the full \$42.5M annually.ⁱ
- (2) Broadcaster licences: CMF funding eligibility requires a broadcast licence. While this structure suited the CMF at founding, these protective guardrails have become structural constraints that now contribute to systemic vulnerability and limitations.
- (3) CRTC regulatory shifts: Starting in 2010, the CRTC introduced group-based licensing (GBL); cancelled daytime exhibition quotas, placing emphasis on Canadian program expenditures (CPE); and eliminated genre specificities, placing emphasis on programs of national interest (PNI), which do not include CY.
- (4) Longstanding advertising restrictions: Limits on CY revenue, including the *Broadcast Code for Advertising to Children* and a ban on advertising to children in Quebec (per the *Consumer Protection Act*), continued to disincentivize the commissioning of CY content.
- (5) CMF genre flexibilities: In 2020, in response to the COVID-19 pandemic and industry requests, the CMF introduced genre flexibility measures to the Broadcaster Envelopes, which have remained in place.

The key theme of the **children/youth research**, “canary in the coal mine,” suggests this genre has been an advance warning of vanishing linear broadcast audiences. Children were the first audience to abandon appointment viewing, moving to streaming and mobile devices. In July 2024,ⁱⁱ it was reported that YouTube is now the top destination for kids' audiences.

The key theme of the **documentary research**, “boom and gloom,” suggests the global market for documentaries is experiencing significant growth, yet mostly for series. Data from Canada and the US indicates a decreased demand for single-episode content, making financing for one-offs increasingly competitive. Although some industry reports suggest that CMF support for one-off documentaries has declined, our research found little evidence to link declines faced by CMF-supported children and youth content with those experienced by one-off documentaries. Nonetheless, the research identified unique challenges within this genre.

The research began with secondary data analysis. To further understand the CMF’s role and producers’ perspectives, we conducted two surveys in June-July 2024. These surveys targeted Canadian producers of CY and documentary content to identify pain points and explore potential CMF flexibilities, considering differences in the English- and French-language markets.

While the surveys revealed that the decline of linear broadcasting has wrought financing challenges for each genre, they also revealed differences in these challenges.

Children/Youth:

- The CY genre is a mature business focused on profitability.
- The primary challenge is accessing large audiences.
- Canadian CY programs have potential to become global hits, like *Paw Patrol*.
- Linear broadcasters, representing traditional media, no longer have the audiences needed to commission the same volume of programs as they did in the past.
- As a result, linear broadcasters no longer drive opportunities, shifting the responsibility to other platforms and funding sources.

One-Off Documentaries:

- One-off documentaries have always been a challenging business.
- They are crucial to culture, offering content that inspires or helps address global issues.
- Data indicates that the main challenge for one-off producers is feasibility—securing enough financing to complete the project.
- Even successful one-offs may not deliver large audiences or substantial revenue.
- Public funding, like Telefilm and the National Film Board (NFB), is vital for producing one-offs.
- There has been more growth in series than in one-offs.

With one genre facing a challenge of globality and the other of feasibility, both genres require modernization.

What are potential paths forward for the CMF? Based on the data, **the CMF could consider establishing a dedicated funding program for Canadian CY content**. The current trends indicate that without such a measure, the CMF is unlikely to meet its genre targets (by approximately 10 percentage points). This research suggests that a dedicated initiative with market incentives for CY content, outside of the envelope system, could provide a structured approach to encourage and support Canadian-made productions.

The case for a dedicated CY program is supported by several key observations. First, the shift in viewing habits toward digital platforms and mobile devices has significantly impacted linear broadcasting, which traditionally served as the primary funding source for CMF-supported content. With BDUs now

contributing less than 40% to CMF funds with access to 60% through the envelopes, a portion of this margin (20%) could be effectively utilized for a new program.

Regarding one-off documentaries, data shows that CMF support has remained stable and increased since the pandemic. The CMF has further demonstrated its commitment by separating one-off documentaries from general documentary targets in 2024–25. One-offs are a vital entry point for diverse and underrepresented storytellers, aligning with the CMF’s focus on supporting these voices. Based on the findings of this study, we suggest monitoring the situation and potentially exploring options to expand the POV Program triggers to include global streamers and Canadian distributors, who can currently only trigger funds when partnered with Canadian broadcasters.

Lastly, **incorporating alternate financing, such as contributions from distributors or pre-sales into the licence fee threshold, could help modernize the CMF’s approach.** The current reliance on broadcasters for the majority of licence fees no longer reflects the evolving media landscape. Both CY and documentary producers view this as a positive step towards encouraging innovation and reducing reliance on the limited number of Canadian broadcasters.

While potential declines in future CMF Program budgets may pose challenges, the considerations presented in this report align with the CMF’s logic model outcomes, focusing on strengthening the global reach of Canadian content and supporting a competitive, resilient audiovisual sector.

Chapter 1: Introduction

“The CMF hasn’t caught up with innovation in the way people are working – and that needs to be addressed.”

**— Mark Bishop, Blue Ant Studios co-president,
Playback June 2024ⁱⁱⁱ**

Mandate

The Canada Media Fund (CMF) is a private-public organization funded by Canada’s broadcasting distribution undertakings (BDUs)—cable, satellite, and Internet Protocol Television (IPTV) distributors—and the Government of Canada, via the Department of Canadian Heritage (PCH). The CMF is mandated by PCH to support four content genres: drama, documentary, children/youth (CY), and variety and performing arts (VAPA).

Motivated by data and calls from industry, this research takes a deep dive into Canadian CY content and documentary one-offs.¹ The mandate arose in response to compelling evidence that, in contrast to the 52% overall growth of the volume (\$M) of the Canadian television industry in the last decade (2013–14 to 2022–23),^{iv} the CMF’s participation has decreased in CY and documentary one-offs, raising questions around the CMF’s ability to effectively serve Canada’s producers in both arenas.

Research Methodology

The research began with secondary data analysis, qualitative and quantitative. To better understand the CMF’s relationship with evolving industry dynamics, we also conducted surveys with Canadian CY and documentary producers.

The surveys were emailed to all recipients in the CMF funding database from the last 10 years (2014–15 to 2023–24). They were emailed on June 18, 2024, and the survey closed on July 12, 2024. Details about the research methodology can be found in Appendix A. Additionally, in August 2024, the CMF contributed to an Ipsos survey to gauge Canadians’ views on the importance of Canadian-made children and youth content.

Background

It is perhaps unsurprising that a singular context underpins all questions about the CY and documentary genres. From its inception, the CMF has been tasked with executing its mandate to support Canadian producers amidst significant digital disruption.

In 2021, it was reported that the number of Canadian households that had either cut their cable subscriptions or never had one (cord-cutters, cord-nevers) had increased 219% between 2013 and 2020.^v In 2024 a tipping point appears to have arrived: in June, broadcast and cable reportedly set a record low by comprising less than half (48%) of all US TV viewing.^{vi} This shift is mirrored in Canada: By the end of 2023, 42% of Canadian households did not have a TV subscription with a traditional provider. Although Canada seems slightly behind the US, forecasts predict that the tipping point (over 50% of

¹ For the purpose of this research, “one-offs” include the following three CMF formats within the documentary genre: one-off, feature-length, and feature film, and excludes series, mini-series, and pilots.

households without traditional TV) will come by 2026. Meanwhile, now, more than 80% of Canadian households subscribe to at least one streaming service.^{vii}

This shift is even more pronounced among younger audiences. On July 30, 2024, *The New York Times* reported that YouTube had dominated streaming time on a TV for 17 months in a row.^{viii} Another 2024 report notes that YouTube has taken over as the #1 kids’ destination, and consequently, Disney’s concern that its “foundational gateway” to their kids’ market is under threat.^{ix}

The CMF’s funding model is structurally tied to the declining broadcast sector for two financial reasons. Canadian BDUs, which originally supplied nearly half of the CMF’s annual budget by contributing 5% of their revenues, have seen their contributions to the CMF decline over the years, dipping below 40% for the first time in 2023–24 to 39.76%, and projected to decrease further. Additionally, a Canadian broadcast licence, with minimum thresholds, is one of several requirements to be eligible for CMF funding. (The other two are the project being 100% Canadian-owned and meeting 10/10 points on the Canadian Audio-Visual Certification Office (CAVCO) Canadian content scale.)

While legacy broadcast audiences and content commissions are diminishing worldwide, streaming has expanded audiences and increased commissioning for the CY and documentary genres. For all CMF-supported genres (with the possible exception of VAPA), streaming has become a dominant platform for content consumption.

CMF vs Industry Growth

Over the past decade, from 2013–14 to 2022–23, the Canadian television industry has experienced substantial growth in volume.^x This increase encompasses all Canadian content rated between 6 and 10 points on the CAVCO scale, i.e., all content receiving a C number. The largest increase in the four CMF genres was in fiction (drama), which saw an increase of 71%, followed by documentary (including series and one-offs) at 70% in volume. Variety/performing arts (VAPA) grew by 54%, while children and youth saw an increase of only 26%.^{xi}

The first of the two tables below shows the CY and the documentary genres’ overall industry growth in volume while the second table shows CMF’s contribution to those genres over the same decade. While the documentary genre grew overall by 70%, the CMF’s contribution to the genre grew 21%. The overall CY genre grew 26%, while the CMF’s contribution to the genre decreased by 29%, suggesting that the CMF may be lagging in contributing to industry growth in the CY genre. Evidence of this lag is further supported by *Profile 2023* data that showcases the number of CMF-supported hours of television production in both genres over the past decade: CMF documentary hours increased 12% and the number of CMF-supported CY hours dropped 43%.^{xii}

FIGURE 1: VOLUME OF CANADIAN CY AND DOC TV PRODUCTION BY GENRE (\$M), 2013–14 TO 2022–23^{xiii}

	2013–14	2022–23	% Change
Children and Youth	\$419M	\$527M	+ 26%
Documentary	\$311M	\$528M	+ 70%

FIGURE 2: CMF CONTRIBUTION TO CY AND DOC TV PRODUCTION (\$M), 2013–14 TO 2022–23^{xiv}

	2013–14	2022–23	% Change
Children/Youth	\$56M	\$40M	- 29%
Documentary	\$57M	\$69M	+ 21%

Another structural context further stresses the CMF’s ability to meet the moment and its capacity to serve producers: the Broadcaster Envelope Program. This is a financial set-aside for use by broadcasters and comprises about 60% of CMF funding.^{xv} When considering funding for linear content specifically—the focus of this research—this percentage rises to 75%.^{xvi}

The envelopes provide the CMF with a mechanism to allocate funds from the BDUs. Funds are allotted to Canadian broadcasters according to a formula that prioritizes audience factors on a per-project basis.^{xvii} The challenge in the current ecosystem is that a key metric of the envelope calculations, total hours tuned (THT), is calculated only from linear broadcast audiences. These audiences have precipitously dropped, making THT a less reliable indicator since many viewers—and most young viewers—have migrated to online platforms.

Another layer of complexity was added during the pandemic, mirroring previous regulatory changes, when the CMF lifted per-genre quotas in the envelopes, allowing broadcasters more flexibility in using funds. While CMF-supported documentaries, including one-offs and features, remained relatively stable, this flexibility resulted in even fewer commissions for CMF-supported CY content (the funds still get spent but are allocated to other genres; see CY and Doc chapters for details).^{xviii} Meanwhile, data indicates that almost half of Canadians turned to streaming platforms during this period.^{xix}

When the CMF lifted the COVID-19 flexibility measures, it did not restore the previous genre quotas but instead permanently integrated this flexibility. Targets for CY still exist; however, they were not met for the past ten years, therefore it remains unlikely they will be achieved moving forward, particularly considering decreasing broadcaster commissions.

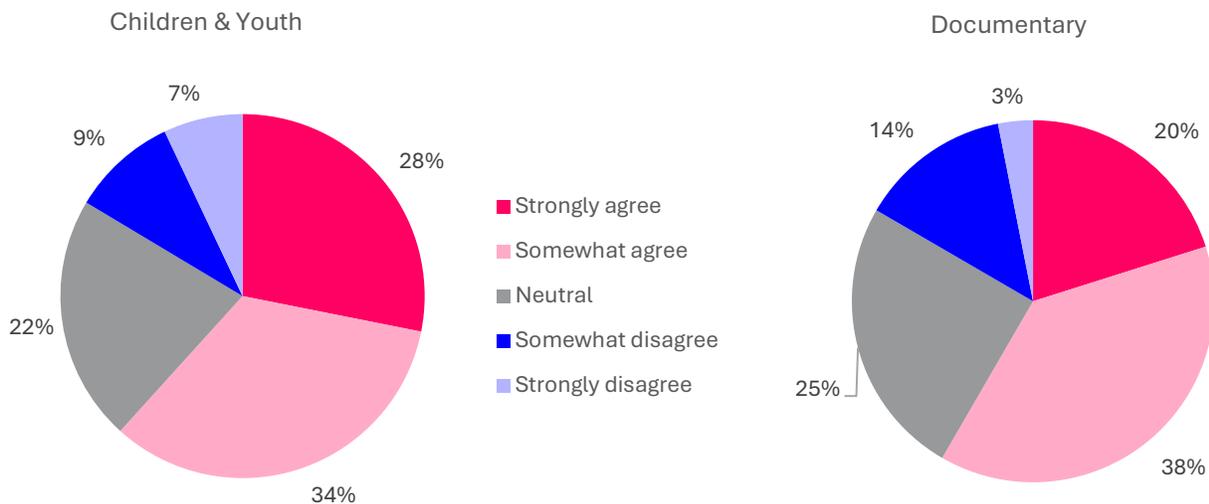
Key Findings

Two surveys were the study’s primary research instruments. They asked producers to weigh in on a variety of topics in the CY and documentary genres, mainly focused on the challenges of financing content. Questions included the importance of preserving cultural identity, target audiences, budgets, one-offs vs series, licence fee thresholds, copyright ownership, and more. In the presentation of survey results, significant differences between Quebec and RoC are reported; otherwise, the overall result from all respondents is indicated. Language of production was not used as a measurement as many companies produce in both languages.

Each survey was customized to its specific genre, but both addressed the need for change, asking respondents to assess the present and the future of their genre. If these questions might be considered a referendum on the desire for change, the answer seems “yes.”

To weigh-in on the present, respondents were asked to agree or disagree with a statement from recent research comparing Canada’s content system with 10 peer countries, finding that Canada’s system is out of step with evolving financing models. Per the two charts below, a majority agreed. For CY, 62% agreed (somewhat or strongly). For documentary, 58% agreed (somewhat or strongly).

FIGURE 3: AGREE OR DISAGREE WITH THE STATEMENT: “THE CANADIAN CONTENT SYSTEM DOES NOT REFLECT THE MATURITY AND WORLD-CLASS EXCELLENCE OF THE CANADIAN PRODUCTION SECTOR [AND] ...IS OUT OF STEP WITH EVOLVING FINANCING MODELS.”



Respondents were also asked for their view of the future, specifically whether they were optimistic or pessimistic about the next five years. For CY, opinions were evenly split, noting that 0% of Quebec CY respondents were “very pessimistic.” On the documentary side, just over a third were optimistic, while nearly half were pessimistic.

The heart of each survey was a series of questions examining attitudes on financing, specifically the potential expansion of CMF funding eligibility criteria. In CY, the data suggests a difference between the preferences for Quebec and the rest of Canada (RoC). Quebec’s top choices were ungated platforms (such as YouTube), Canadian distributors, and “other,” with respondents’ comments including ideas like mandating broadcasters to support CY content and direct access to CMF funds for developing new projects. RoC respondents chose global streamers, 6–9-point projects, and ungated platforms. The commonality of both groups was prioritizing ungated platforms to trigger CMF eligibility, perhaps reflecting knowledge of where the CY audiences are now. In documentary, there was alignment between Quebec and RoC, with streamers, Canadian distributors, and lower licence fee thresholds in the top three, though in different orders.

There were a number of other relevant results. Respondents across the country and in both genres asserted the role of content in preserving cultural identity. Also, in both genres there was an overwhelming preference to maintain the requirement for 100% copyright ownership—an inflexibility that may be incompatible with integration of global streamers, for which the industry successfully lobbied, resulting in the *Online Streaming Act*. In the documentary survey, respondents surfaced an important, yet overlooked, conflict of interest between Canadian broadcasters and distributors. Additionally, documentary respondents challenged the assumption that one-offs are inherently more culturally relevant than series.

The Broadcaster Envelopes and the PCH Contribution Agreement may play a significant role in implementing the CMF’s way forward. Ultimately, the findings suggest that to successfully address the

mandate of the study—how to best support the CY and documentary genres in the present ecosystem—the CMF may require policy flexibility beyond the current terms of the Contribution Agreement *and* flexibility on the CMF’s funding formulas.

Report Structure

This report is organized into four chapters. This introductory chapter provided an overview of the global context and the CMF’s position in the Canadian industry, as well as a brief review of the research methodology and key findings. Here’s how the remainder of the report is organized:

- **Chapter 2: Children/Youth** presents an analysis of secondary data; a full report on the survey findings; findings from a supplemental Ipsos survey; and key takeaways and considerations, based on the data.
- **Chapter 3: One-off Documentaries** presents an analysis of secondary data; a report on the survey findings, including the POV Program; and key takeaways and considerations, based on the data.
- **Chapter 4: Conclusion** integrates findings into a set of key observations and takeaways. Data-based considerations are set out for ways the CMF might increase its capacity to support CY content and one-off documentaries.

Chapter 2: Children/Youth

“Our biggest financing gap comes from Canadian kids broadcasters. They genuinely seem like they have little to no desire to greenlight Canadian productions and, when they do, the license fee is so low it becomes incredibly difficult to create a viable financing structure.”

— Respondent, CMF Children/Youth Producers Survey, July 2024

“We have a know-how, an expertise that will disappear if there isn’t a political and economic will to make youth programming a priority. Tomorrow’s adult audience is built on today’s youth audience.” [translation]

— Respondent, CMF Children/Youth Producers Survey, July 2024

Children/youth (CY) is one of the four content genres the CMF is mandated to support. However, it is also an audience. As reported in *The Globe and Mail* in 2023, “Kids TV has become one of Canada’s best-known exports in the last decade,”^{xx} with *Paw Patrol* being a strong example. Simultaneously, over the past decade, viewing habits of the CY audience have undergone significant changes. Factors contributing to this include regulatory shifts, market dynamics, and funding challenges—all underscored by the longer-term audience transition from linear broadcast to online.

Secondary Data Analysis: Canary in the Coal Mine

Global

The problem of vanishing young audiences from linear broadcasting is a global trend. A 2024 article from *Business Insider*^{xxi} notes that “kids are now getting their TV fix on streaming, which accounts for two-thirds of TV watch time for children 2 to 11,” and that younger audiences prefer short-form videos over longer episodes and movies. The same article says that, for kids, “YouTube has become king.”

Parrot Analytics, reporting on the period between January 2020 and September 2021, reported streaming demand for children’s programming was “on fire.”^{xxii} In 2023, *Wired* noted that children’s media comprised a significant share of demand for streaming platforms, with, for example, more than 15% of total demand on Netflix, Paramount+, and Amazon Prime being for CY content.^{xxiii} However, in 2024, some streamers began cutting back, with Paramount+ shutting down its children’s streaming service, Noggin, after companywide layoffs^{xxiv} and then dropping ten CY titles from its offering.^{xxv}

Canada

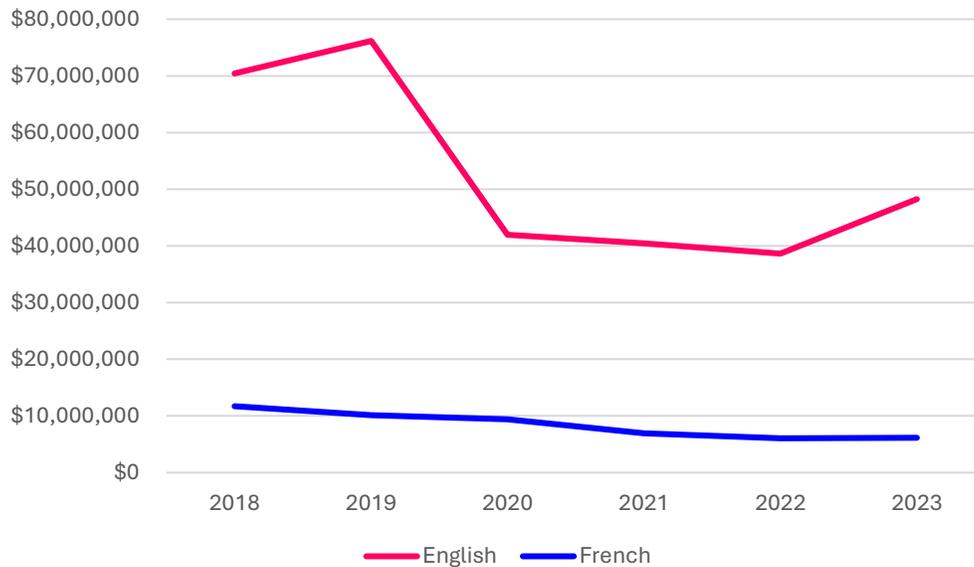
In 2014, the CRTC’s *Let’s Talk TV: Quantitative Research Report* found that 39% of Canadians were already using on-demand services.^{xxvi} By end of 2020, as mentioned in Chapter 1, the number of Canadian households that had either cut their cable subscriptions—or never had one—had increased 219% from 2013.^{xxvii}

Starting in 2010, CRTC introduced a series of regulatory shifts, including group-based licencing (GBL), the removal of daytime exhibition requirements for broadcasters, and emphasizing PNI, which did not specify CY.^{xxviii}^{xxix} As a result, broadcasters were provided the opportunity to migrate commissioning

from CY to other genres (e.g. drama) that had the ability to generate higher advertising revenue and earn greater CMF Envelope credits.²

The CMF analyzed Canadian program expenditures (CPE) on CY programming from 2018 to 2023, using 11 English-language and 4 French-language channels as proxies. This analysis revealed decreases in both English-language and French-language commissions, with the caveat that in the most recent year both languages saw somewhat of an increase.

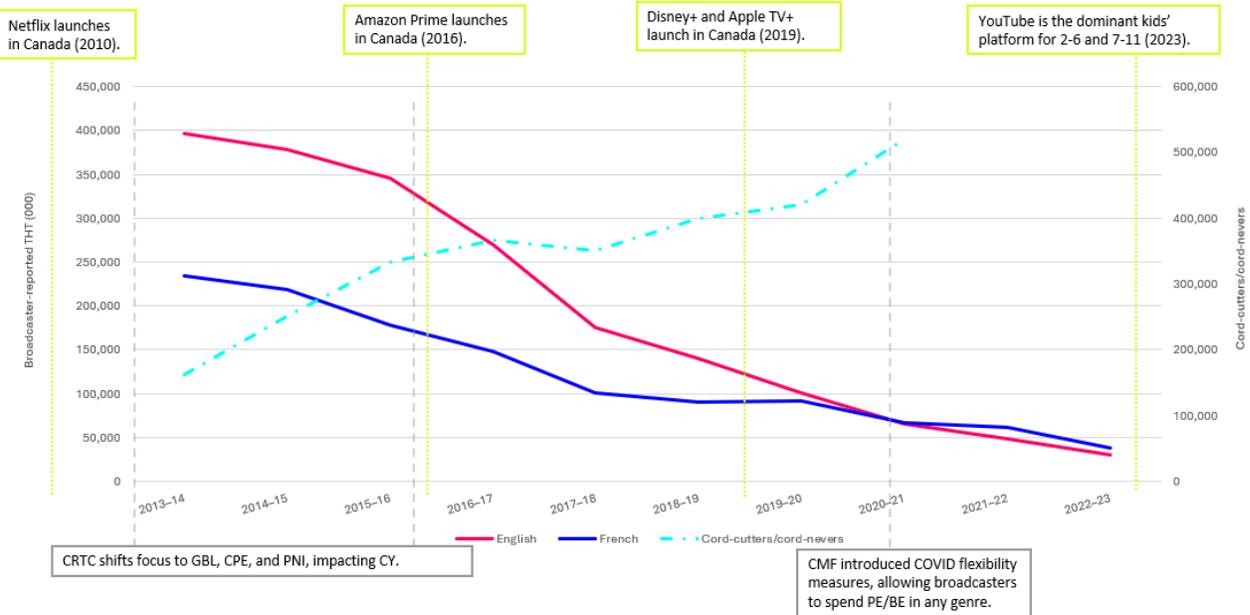
FIGURE 4: TOTAL CANADIAN PROGRAMMING EXPENSES, CHILDREN/YOUTH CHANNELS, 2018 TO 2023



Total hours tuned (THT), the audience-measurement metric the CMF uses to calculate Broadcaster Envelopes, has also significantly declined over the past decade. While Corus has been a major site of this decline, it is not the sole contributor. From 2013–14 to 2022–23, broadcaster-reported THT for CY dropped by 89% overall, with English THT falling 92% and French THT by 84%.^{xxx} Numeris data from 2023 confirms that younger Canadian audiences, including more than half of teens in Ontario and Quebec, aged 12 to 17, are abandoning linear broadcast, moving to streaming and social media.^{xxxi} Per the figure below, the THT decline, plus the increase of cord-cutters and cord-nevers, illuminates the changing ecosystem.

² Restrictions on advertising to children include the need to align with the *Broadcast Code for Advertising to Children (Children’s Code)* and a full prohibition in Quebec by the *Consumer Protection Act*, which “prohibits commercial advertising that targets children under the age of thirteen” (<https://www.opc.gouv.qc.ca/en/consumer/topic/illegal-practice/advertising-children/>).

FIGURE 5: BROADCASTER-REPORTED THT (000), CHILDREN/YOUTH CHANNELS, 2013–14 TO 2022–23; CORD-CUTTERS/CORD-NEVERS IN CANADA, ^{xxxii} 2013 TO 2020; TIMELINE OF KEY STREAMING EVENTS, 2010 TO 2023^{xxxiii}



These market changes have led to recent closures of CY channels. Bell Media announced their plan to shutter VRAK, the French-language CY channel, in October 2023, citing “significant challenges” in the industry.^{xxxiv} Le Groupe TVA also announced the closure of their CY channel Yoopa in November 2023, citing increased competition from foreign platforms for children’s content.^{xxxv} Also in 2023, Corus announced that TELETOON was going to be rebranded as the Cartoon Network, impacting its delivery of Canadian content.^{xxxvi}

Unsurprisingly, broadcast commissions also dropped. As noted in *Playback*, Writers Guild of Canada’s figures from 2017 to 2022 show that “episodes of half-hour children’s live-action series decreased by 44% and half-hour animation episodes fell by 85%.”^{xxxvii}

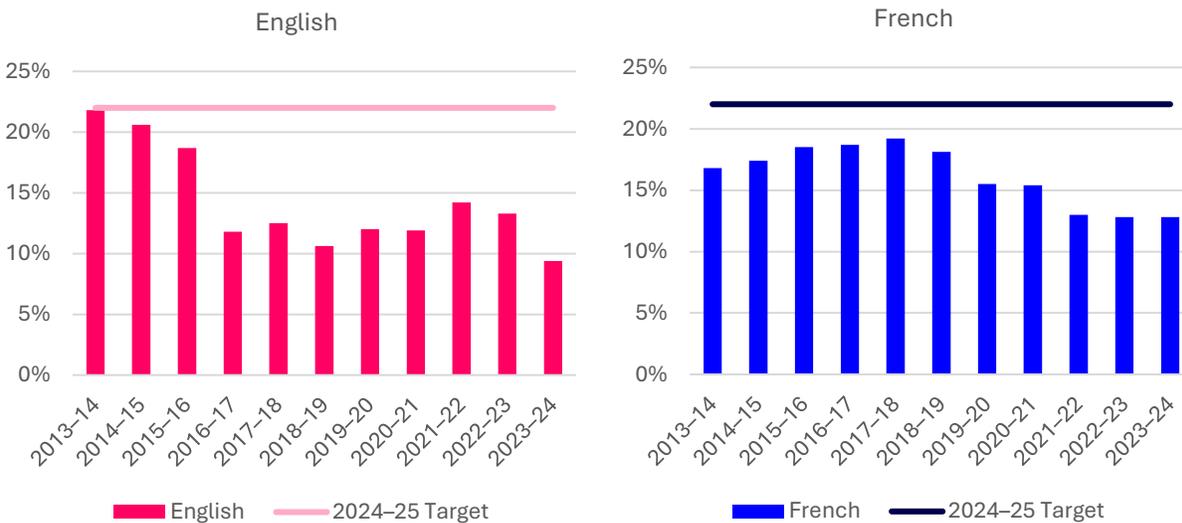
In May 2020, not long after the pandemic began, and aligned with existing CRTC flexibilities, the CMF began offering flexibility around genre targets^{xxxviii} to broadcasters in the Performance Envelope Program (now called Broadcaster Envelope Program) to “give eligible applicants and broadcasters additional latitude in accessing the CMF’s existing programs.”^{xxxix}

FIGURE 6: CMF GENRE ALLOCATION TARGETS AND RESULTS, CY, 2020–21 TO 2024–25^{xl}

Fiscal Year	CY English				CY French			
	CMF Target %	CMF Target \$	Result %	Result \$	CMF Target %	CMF Target \$	Result %	Result \$
2020–21	21%	\$37.6M	11.9%	\$21.3M	17%	\$15.7M	15.4%	\$14.2M
2021–22	21%	\$38.7M	14.1%	\$26.1M	17%	\$15.9M	13.0%	\$12.2M
2022–23	21%	\$38.6M	13.3%	\$24.4M	21%	\$19.5M	12.8%	\$11.8M
2023–24	21%	\$39.1M	9.4%	\$17.5M	21%	\$21.9M	12.8%	\$13.4M
2024–25	22%	\$41.4M	-	-	22%	\$22.7M	-	-

In 2023–24, the CMF’s genre allocation target for CY was 21%, however only 9.4% for English-language content and 12.8% for French-language content was reached. Per the figure below, between 2013–14 and 2023–24, the CMF’s funding for the CY genre decreased by 12.4 percentage points in English and 4.1 percentage points in French.^{xii}

FIGURE 7: CMF GENRE OUTCOMES VS 2024–25 TARGET, CY, 2013–14 TO 2023–24



The CMF currently allocates only about half of its intended funds for CY content, which means approximately \$30M of CMF funds are not directed towards meeting genre allocation targets for CY content. Given that every \$1 of CMF funding in CY production leverages roughly \$6 in production volume, this suggests that an additional \$30 million in CY funding could unlock approximately \$180 million in production volume across Canada. Not meeting these targets could be seen as an underutilization of available economic potential within the sector.

This issue is particularly significant given the federal government’s strong belief in the importance of Canadian content for young Canadians. The Minister of Heritage, Pascale St-Onge, emphasized at Prime Time 2024 that “it’s really important that we invest in that future generation and that we’re there for them,” noting that access to Canadian content is key to ensuring young Canadians “stay loyal to our cultural community.”^{xiii}

Speaking to the issue, Mark Bishop, Blue Ant Studios co-president, recently commented that the drop in broadcaster commissions makes it “difficult to access the money allocated by the Canada Media Fund (CMF) to kids and family content...without a broadcast licence as a trigger, there’s a pool of CMF revenue that can’t be accessed by producers.”^{xiii}

The CY genre might be called a “canary in the coal mine,” an early warning, not simply about audiences abandoning legacy TV, but as the first genre to require “policy oxygen” to release producers from the structural constraint that requires a legacy broadcaster to trigger CMF funding—necessary to maintain Canada’s established reputation in CY content and enhance our global reach.

Results from the Children/Youth Producers Survey

“Canadian linear broadcasters are the most difficult buyers to deal with.... Their way of doing business is broken.”

— Respondent, Children/Youth Producers Survey, July 2024

“We can barely rely on Canadian broadcasters anymore.”

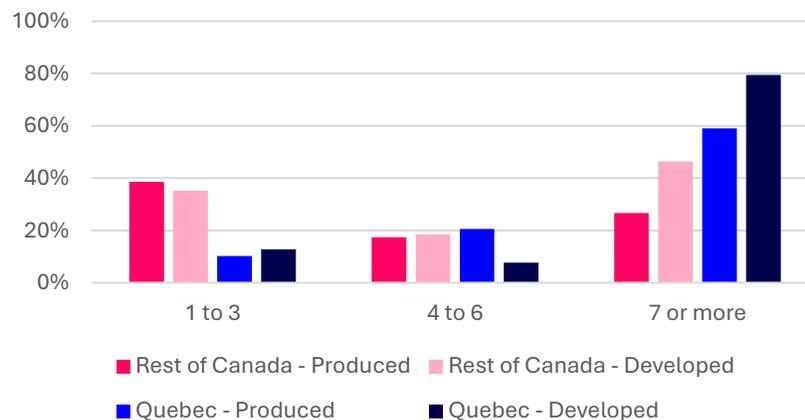
— Respondent, Children/Youth Producers Survey, July 2024

Basic Data

Of the 154 respondents to the CY survey, there was a mix of CEOs, producers, senior executives, heads of development, and showrunners, among other positions. They came from a variety of regions, with the largest percentages (40% and 17%, respectively) from Toronto and Montreal, with around 9% in the rest of Quebec, the rest of Ontario, and British Columbia each,³ and 3% or less in the rest of the provinces and territories, except Newfoundland and Labrador and Northwest Territories, which were not represented). Of the total respondents, 27% were from Quebec and 73% from rest of Canada (RoC).

Data suggests an experienced group of respondents, with about half (49%) having 11 or more years of experience and just over a quarter (27%) with 6 to 10 years. Quebec respondents were more experienced, with 59% of them stating they had produced 7 or more projects, compared to 27% of those from the RoC.

FIGURE 8: HOW MANY CHILDREN/YOUTH PROJECTS FOR LINEAR TV, STREAMERS, AND/OR UNGATED PLATFORMS HAS YOUR COMPANY PRODUCED AND DEVELOPED IN THE LAST 10 YEARS (2013–14 TO 2023–24), WHETHER OR NOT SUPPORTED BY THE CMF? (A SERIES COUNTS AS ONE PROJECT.)



About 68% of respondents in both RoC and Quebec work in live action. In RoC, 72% work in animation and 43% work in content that is part animation and part live action, compared to 56% and 23% in Quebec, respectively. Regarding primary language of production, 93% of respondents in RoC stated

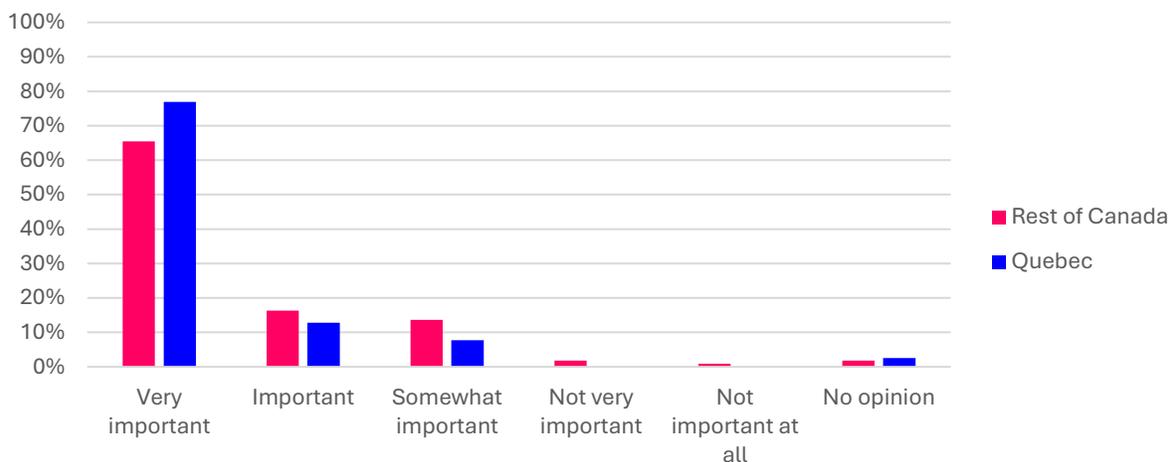
³ 10%, 9%, and 8% respectively

English; in Quebec, 73% stated French and 50% stated English. Importantly, 21% of respondents stated they produced primarily in more than one language (in any combination of English, French, Indigenous, and other).

Culture and Diversity

An overwhelming 95% of respondents reported it was at least somewhat important for CY content to help preserve language and cultural identity, a sentiment consistent across Quebec and the RoC.⁴

FIGURE 9: HOW IMPORTANT IS IT FOR CHILDREN/YOUTH CONTENT TO HELP PRESERVE LANGUAGE AND REFLECT CULTURAL IDENTITY?



Several respondents noted that the current system does not always support this goal:

- “There must be cultural content requirements to introduce children to our culture.” [translation]
- “We have never been successful with linear broadcasters or large streaming companies or distributors because we produce a niche programming reflective of our culture. These organizations do not see the value in supporting and investing in this.”
- “[Canadian distributors have a] lack of interest in diverse stories.”
- “As an Indigenous Inuk from Nunavut it is hard to break-through the tv industry.... They also try to justify that APTN should fund these types of projects, making it even more difficult to break-through mainstream media.”
- “We’re encouraged to create authentic content and for creatives from the various diasporas who call Canada home, it also means that sometimes we want and need to collaborate with non-Canadian creatives.”

Budgets

Just under half (44%) of respondents noted their productions were low budget, with amounts under \$300,000 per half-hour.⁵ Only 21% indicated budgets above \$500,000 per half-hour. When asked about where the highest cost increases have been seen, about 49%⁶ cited below-the-line labour. However,

⁴ More Quebec respondents stated it was “very important” (77% compared to 65% on the RoC side), and no Quebec respondents stated it was not important, compared to 3% of RoC respondents.

⁵ 41% RoC, 54% Quebec

⁶ 44% RoC, 64% Quebec

one respondent highlighted that the problem is not about costs: “Costs are not our problem at the moment. Market downturn is our problem. Changes in regulation allowing Canadian broadcasters to stop spending on kids and animation is our problem.”

Other comments spoke to the fact that quality shows that reach audiences often require higher budgets, but funding is not available for that, and others spoke to the decreasing licences, which, paired with high costs, makes it difficult for companies to produce.

- “There is a lack of dedicated funds for high-cost animation projects, which often have higher production expenses but also significant potential for global revenue and cultural impact.”
- “The amounts given are not enough and lower quality shows, which we do see coming from these funds, are just not ones that will win awards and be exportable.... The cost of living and our employees have all gone up, yet the licenses keep getting slashed.”
- “Currently, in animation, the cumulative licenses of all broadcasters for a given project do not reach the threshold license for television broadcasting. This means that productions are becoming smaller and smaller in format, or of lower quality. Series have fewer and fewer episodes, and as a result are losing notoriety and discoverability.” [translation]
- “The level of budgets, it’s getting harder and harder to recruit and keep certain members of the team (especially writers) given the difference in price paid between a youth’s series and other types of production.” [translation]

Internal CMF data from 2019–20 to 2023–24 shows that CMF-funded CY budgets for animation and live action saw a significant spike in 2020–21 and 2021–22, largely due to a few big-budget productions. Notably, there were seven CY projects with budgets exceeding \$10 million in both 2020–21 and 2021–22, but this number dropped to just one in 2023–24. The overall decline is driven primarily by decreases in English-language productions.^{xiv} While the increases in the table below coincided with the COVID-19 pandemic, the disparity is primarily linked to declines in big-budget productions. The recent overall decline in budgets may support producers’ claims that CMF-funded CY projects are not keeping up with the quality of higher-budget productions financed on international scales outside the CMF.

FIGURE 10: AVERAGE PRODUCTION BUDGET AND AVERAGE BUDGET COMPONENTS FOR CMF-FUNDED CY PROJECTS, 2019–20 TO 2023–24

	2019–20	2020–21	2021–22	2022–23	2023–24
Production Budget	\$2,037,143	\$3,116,411	\$3,111,852	\$2,683,018	\$2,222,876
Above the Line	\$358,078	\$554,505	\$585,193	\$534,445	\$425,139
Below the Line	\$1,199,008	\$1,928,520	\$1,833,546	\$1,502,946	\$1,216,095
Post-Production	\$221,075	\$262,090	\$302,182	\$275,636	\$249,609
Digital Media	\$54,491	\$48,089	\$45,718	\$48,394	\$32,453
Other	\$203,085	\$306,521	\$318,148	\$274,593	\$268,001
Contingency	\$1,406	\$16,687	\$27,066	\$47,004	\$31,580

Target Audiences

Geographic Demographic

The results suggest that respondents prioritize both domestic and global audiences. However, Quebec and RoC respondents targeted different audiences for their CY programs. In Quebec, 59% of respondents stated their most important audience is French-speaking Canada or Quebec specifically,

followed by global (21%). In contrast, RoC respondents picked English-speaking Canada and global almost equally (41% and 39% respectively).

Several producers replied in “other” that their target was Northern Canada and/or Indigenous audiences. Finally, while the question (perhaps in error) presumed inclusion of the US in “global,” several producers did specify their target market to be Canada, the US *and* global.⁷

Age Demographic

When queried about the age demographic of their target audience, the data suggests many CY respondents are producing content for multiple audiences. Nearly all respondents (90%) checked 6–11 years, while a majority (62%) checked 2–5 years. More Quebec respondents indicated creating content for 12–17 (69% vs 51%, respectively). In general, producers (72%) noted that their target audience had remained relatively consistent over the past decade.⁸ If there was a shift, the reasons were clear: producers follow the money, i.e. where the buyers are, which is where the audiences are. Several respondents noted they had moved to a preschool and school-age demographic as the demand for those programs is higher.

- “Kids are more mature at a younger age. They watch content meant for older audiences.” [translation]
- “Preschool has dominated animation because it is seen as the only profitable demographic at the moment. Easiest demographic to monetize.”
- “Difficulty in monetizing younger audiences due to advertising restrictions and migration to YouTube and TikTok.”

Financing and Triggers

Given the substantive changes in audience viewing habits and financing opportunities, the survey explored current funding priorities and attitudes toward expanding the triggers for CMF funding beyond the limited set of Canadian broadcasters.

Top Financing Sources

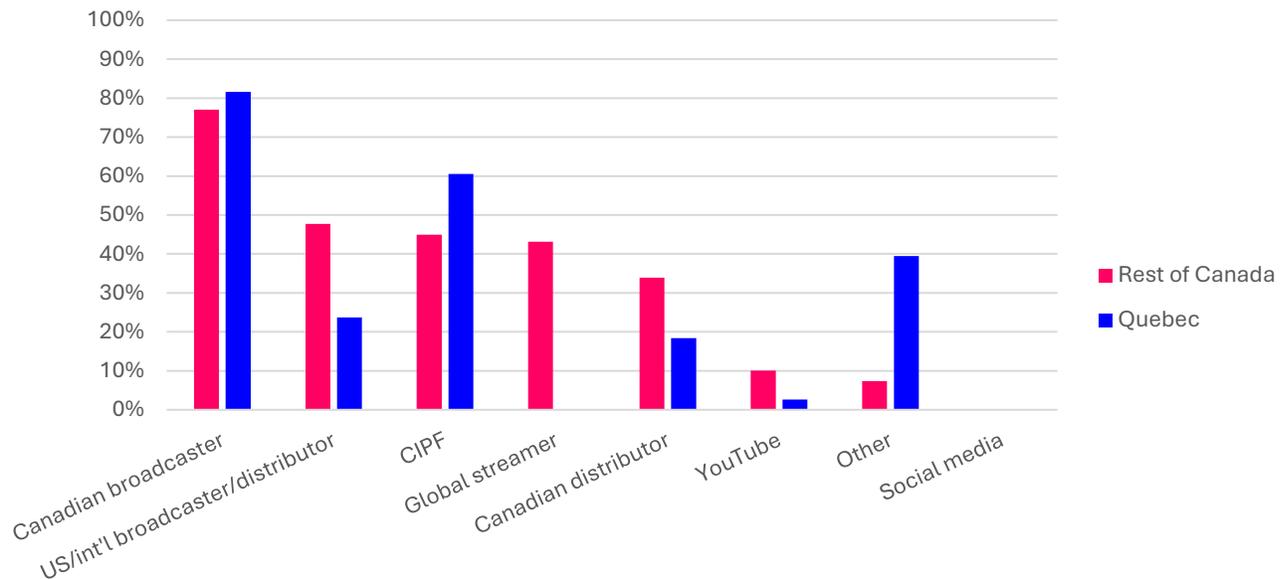
Respondents were asked to choose their top priorities for funding, and a high majority (78%) selected linear broadcasters.⁹ While this first choice was consistent across Quebec and RoC, the two regions had different second and third choices. Quebec respondents identified Certified Independent Production Funds (CIPFs) as the next choice (61%) and then “other” (39%), where over half mentioned public funding (e.g. SODEC, Telefilm). In contrast, RoC producers ranked US or international linear broadcasters second (48%) while CIPFs came in third (45%). Interestingly, while not in the top three options, 43% of RoC respondents picked a global streamer, while 0% of Quebec respondents did.

⁷ This ambiguity may warrant follow-up to determine whether the US, as a large, proximus English-speaking market, may not be seen as priority because children/youth producers can’t get access, given their reliance on linear broadcasting. If so, this data might starkly differ from YouTube, where creators prioritize monetizing US audiences, as there is no gatekeeper on this platform.

⁸ 68% RoC, 82% Quebec

⁹ 77% RoC, 82% Quebec

FIGURE 11: TOP THREE PRIORITIES FOR SECURING FINANCING FOR CHILDREN/YOUTH PRODUCTIONS, EXCLUDING TAX CREDITS AND THE CMF



Canadian Linear Broadcasters

The preference for Canadian linear broadcasters as the top financing partner stems from the critical role they play in unlocking additional funding within the current system. When asked about the biggest advantage of financing with Canadian linear broadcasters, 78%¹⁰ of respondents said it was because they help trigger other sources of financing. However, a majority of respondents (65%)¹¹ identified that the limited number of Canadian broadcasters is a main issue in turning to them for that financing. Other problems included low licence fees and the perception that broadcasters “don’t have enough money.”

- “[Canadian kids broadcasters] genuinely seem like they have little to no desire to greenlight Canadian productions and, when they do, the license fee is so low it becomes incredibly difficult to create a viable financing structure to produce even a ‘green-lit’ series.”
- “The producer would have to be able to access an equity investment without the broadcaster’s support.” [translation]
- “Since the CRTC dropped the genre requirements for broadcast license groups, our broadcasters are unwilling to pay significant license fees for kids content. As a result the license fee threshold prevents us from accessing CMF.”
- “We are limited by the participation of broadcasters. These broadcasters often require exclusive rights, even on platforms where their reach is low, further constraining our ability to maximize the distribution and impact of our content.”

Canadian Distributors

When including Canadian distributors in financing, the biggest benefit, according to nearly half of respondents (49%)¹² was that they can help trigger CMF eligibility. However, the main disadvantage,

¹⁰ 74% RoC, 92% Quebec

¹¹ 66% RoC, 59% Quebec

¹² 51% RoC, 43% Quebec

noted by 36%,¹³ was that Canadian distributors cannot *solely* trigger CMF funds. While almost a quarter of respondents (23%) saw no disadvantage to including a Canadian distributor in primary financing, some expressed frustrations:

- “The majority of Canadian distributors do not possess salesforces and marketing resources that are as robust as those of international distributors.”
- “It’s extremely rare to get any money up front from distributors these days.”
- “They’re more generalists, whereas we’re looking for youth specialists who have their fingers on the pulse of international youth broadcasters.” [translation]

Global Streamers

Respondents across both RoC and Quebec agreed that the biggest advantage of working with global streamers was their access to large global audiences (37%), followed closely by the potential of getting more money for their projects (35%).

Disadvantages, however, varied between RoC and Quebec. For RoC, the primary concern (28%) was the potential requirement to sign over copyright ownership. In Quebec, there were two main issues (25% each): global competition for commissions and the streamers’ inability to trigger CMF eligibility. RoC highlighted that same issue—the inability for streamers to trigger CMF eligibility—as their secondary concern (21%). Other observations about global streamers included:

- “While the potential for access to large audiences and increased funding is appealing, in reality, global streaming services do not invest significant amounts of money in Canadian children’s and youth content.”
- “In addition to the possibility of having to assign copyright (which we don’t want given the remuneration systems for French-language productions in order to bind the authors of the work to the economic life of their work), there could be a flattening of the local or cultural color proposed in the project in order to ‘please’ a larger number.” [translation]
- “They are totally inaccessible to small producers.”
- “The cost of animation is so high now that, given our current funding levels, CBC Kids can’t finance a full-length animated series without a significant partner.”
- “Global streaming services do not have obligations to produce children’s content or Canadian content. As a result, they do not prioritize content based on the educational or cultural needs of Canadian audiences.”

Ungated Platforms

Ungated platforms such as YouTube and social media have become major players in the CY content space.¹⁴ Respondents noted the biggest advantage in monetizing through these platforms is their direct connection to large audiences (33%) and free, easy access to global distribution without contracting by territory (25%).¹⁵ However, producers also noted challenges, including the need to self-fund production (43%)¹⁶ and the responsibility of finding their own audience for monetization (39%).¹⁷ Given the stated importance of audience reach, expanding triggers to include launches on ungated platforms might

¹³ 34% RoC, 41% Quebec

¹⁴ Ungated platforms operate under business models whereby revenue is generated through ad revenue sharing, which shifts the responsibility to the producers to invest in marketing and audience engagement to succeed.

¹⁵ 27% RoC, 19% Quebec

¹⁶ 39% RoC, 56% Quebec

¹⁷ 44% RoC, 25% Quebec

better support producers in connecting with their audience where they are. Other considerations for monetizing through ungated platforms include:

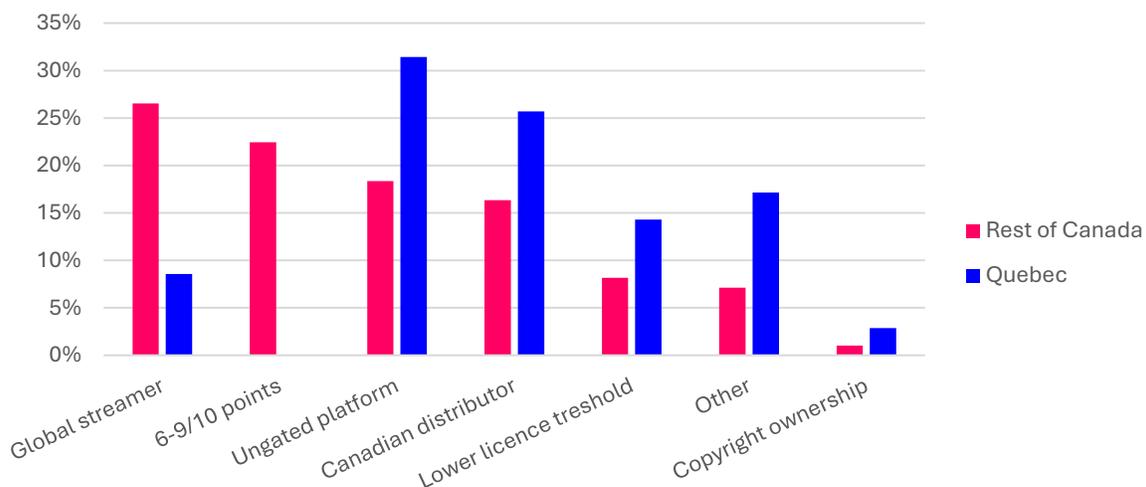
- “We don’t monetize content for children under 12.”
- “Must make LOTS of content with little return.”
- “Reduces the value of my project to streaming services and broadcasters, who will pay much less for programs already available via AdVOD.”
- “Platforms like YouTube and TikTok are opening new opportunities to find global viewers. We need to get ahead of this curve, or at least respond to it effectively.”
- “Least amount of barriers for content creation.”

Top Trigger Flexibilities

Currently, to access CMF funds, producers need a broadcaster on board. Given the changing landscape detailed earlier in this chapter, perhaps it is time for new trigger flexibilities; as one survey respondent noted: “we need to find a way for CMF to trigger funds WITHOUT a traditional license attached.”

Producers were asked which potential flexibility in CMF funding eligibility would most enhance their ability to develop or produce CY projects. Responses varied significantly between RoC and Quebec. Per below, in RoC, the top three potential triggers were global streamers (26%), projects with 6 to 9 out of 10 points (22%), and a launch on an ungated platform like YouTube (18%). In Quebec, the launch on an ungated platform came first (31%), followed by a Canadian distributor (without broadcaster, 26%), and “other” (17%), which included mandating broadcasters to spend on CY content and direct access to CMF funds for new project development.

FIGURE 12: WHICH POTENTIAL FLEXIBILITY, IN TERMS OF ELIGIBILITY FOR CMF FUNDING, WOULD BE MOST USEFUL FOR YOUR COMPANY’S ABILITY TO DEVELOP OR PRODUCE CHILDREN/YOUTH PROJECTS?



Additional responses in “other” included:

- “If you maintained a 10 out of 10 Canadian crew requirement, but opened up global streamers to CMF eligibility, there would be a boom of production in Canada. American streamers would pour money north of the border.”

- “Given the limited access of Canadian broadcasters’ envelopes to youth production, a youth and animation spending obligation should be imposed on Canadian broadcasters.” [translation]
- “The lack of a youth content-specific envelope or a dedicated portion of the envelope for broadcasters poses a serious threat to the creation of high-quality content for Canadian youth audiences.”
- “There could be a softening, a flexibility on the creative score needed, a 7-8 out of 10.” [translation]
- “We’d like CMF to be able to participate in equity investment in structures to supplement funding and be part of the recovery structure without broadcaster intervention.” [translation]

Financing Takeaways: Globality

Access to global audiences emerged as an important advantage across three financing sources: Canadian distributors, global streamers, and ungated platforms. As mentioned, just over a third (37%) of respondents noted that global reach is the primary benefit of financing with a global streaming service, and a third (33%) indicated the same for monetization via ungated platforms. On top of this, 22%¹⁸ indicated the biggest advantage of Canadian distributors is their close relationship with global audiences. Regarding globality, an important potential market trigger, respondents stated:

- “Finance content for platforms where we can reach the Canadian kids audience. YouTube, American Streamers, Roblox.”
- “Some producers have developed highly engaged communities online (e.g., on YouTube) and have created substantial audiences. These producers should be considered as broadcasters and be eligible to trigger CMF funding.”
- “We need to be able to create quality content for kids that is exclusively for YouTube and online like TikTok. This is essential for building shows that are brands and have the ability to become top tier cultural exports.”
- “Targeted support to encourage producers to develop their own international distribution capacity is what is needed to take us to the next level and move Canada from the antiquated 20th century system of producing for the Canadian broadcast spectrum to producing for global audiences.”
- “More funding for projects to have better quality to be competitive in world market.”

Copyright Ownership

Copyright ownership remains a relevant consideration in discussions about modernizing the Canadian content system. 62% of respondents reported that all their CY projects are fully owned by Canadians. When asked what portion of their CY projects were developed or produced without CMF support, the average was 37%.¹⁹ Among companies with projects entirely owned by Canadians, about 31%²⁰ reported their projects were developed or produced without CMF support.

This data suggests that the CMF may be missing out on supporting a third of Canadian CY projects that may have otherwise been eligible. It is unclear whether this is by choice (e.g. choosing streamers or

¹⁸ 21% RoC, 24% Quebec

¹⁹ 39% RoC, 30% Quebec

²⁰ 33% RoC, 25% Quebec

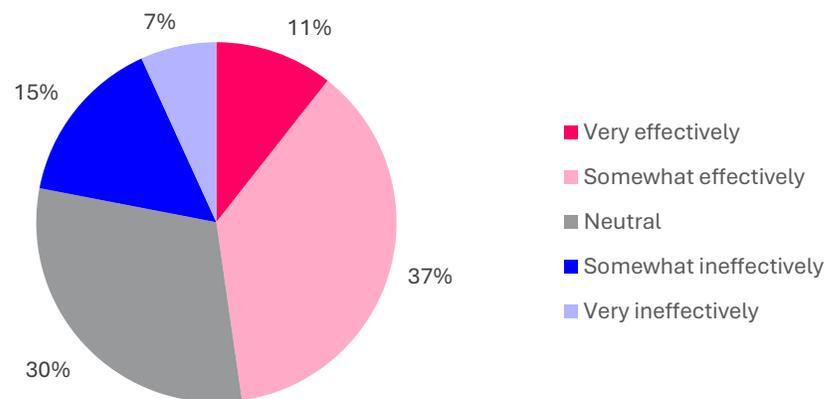
ungated platforms over Canadian linear broadcasters) or by necessity (e.g. cannot get a linear broadcaster attached, are not 10/10-point projects, and/or do not have Canadian IP ownership).

A negligible percentage (under 2%) of respondents stated they wanted more flexibility in copyright ownership as a potential trigger for CMF funding eligibility. Aligned with this result, when asked whether the requirement for copyright ownership to be eligible for CMF funding was seen as an advantage or disadvantage, the majority (56%)²¹ considered it an advantage (small or great). Further supporting this, the possibility of signing over copyright ownership was cited as one of the bigger disadvantages for working with global streamers. Conversely, when working with ungated platforms, the opportunity for global monetization *without* signing over copyright ownership was noted as a key advantage (16%).

Canada Media Fund

In general, respondents held a relatively favourable position on the CMF’s effectiveness in terms of how it funds CY producers. Per the figure below, about half (48%) agreed the CMF is effective (somewhat or very), with only about 22% responding ineffective (somewhat or very); the rest were neutral.²²

FIGURE 13: IN GENERAL, HOW EFFECTIVELY DOES THE CMF’S CURRENT FUNDING STRUCTURE SERVE CHILDREN/YOUTH PRODUCERS? (ALL RESPONDENTS)



Working with the CMF

Respondents were asked how several factors impacted their desire/ability to work with the CMF. As discussed, while copyright ownership was seen as an advantage, the requirement for a broadcaster to trigger CMF funding was seen mostly as a disadvantage, either small or great (54%).²³ In terms of projects being 10/10 points in the CAVCO points system, almost half of respondents (45%) noted it was a disadvantage (small or great). Finally, a large percentage of respondents were neutral when asked if CMF guidelines and the application process impacted their desire to work with the CMF (41%).²⁴

Several respondents also expressed their concern on the genre flexibilities that were introduced to broadcasters during COVID, which have been made permanent:

²¹ 51% RoC, 69% Quebec

²² Generally speaking, Quebec seemed to find the CMF more effective than RoC; with 58% saying somewhat or very effective (vs 44%), 21% saying somewhat ineffective, and none said very ineffective (vs 13% somewhat and 9% very ineffective on RoC side).

²³ 57% RoC, 45% Quebec

²⁴ 43% RoC, 38% Quebec

- “Because the genre requirements have gone away the number of Canadian broadcasters commissioning kids content has dwindled significantly.”
- “Since the arrival of the CMF flex, youth production trigger obligations have dropped.” [translation]

Finally, respondents were asked what other support or resources they would like to see from the CMF. A thematic analysis revealed that many wish to see dedicated funding programs for CY. These requests highlight the need for funding that addresses specific gaps, such as high-cost animation projects, development, and CY content in general. Additionally, several responses highlighted the importance of ensuring Canadian funding to maintain the authenticity and integrity of Canadian content. Some of the responses were as follows:

- “The CMF should fill gaps with money set aside specifically for Kids as a genre. A program like English POV but for kids content would be great.”
- “The current funding structure does not sufficiently support independent producers, with the balance of power heavily in the hands of large corporate groups of broadcasters.”
- “A fund dedicated to youth production that could be accessed directly by producers.” [translation]
- “Animation should have its own CMF envelope, since the genre is not prioritized by most Canadian broadcasters.” [translation]
- “Access to direct funds to develop new content for the industry.” [translation]
- “More early development financing would make all of the difference for our company.”

Canadian Consumers Weigh In: Why Children/Youth Content Matters

During the same time frame as this research on Canadian producers was ongoing, the CMF was invited to contribute questions to an Ipsos Omnibus survey of Canadian consumers, with a focus on the importance of Canadian CY content.

Two questions were asked of the Ipsos sample: (1) How important it is that Canadian-made content for 2–17-year-olds is available on television and digital platforms, and (2) whether Canadian CY content provides cultural benefit—understanding Canadian values, learning language, promoting diversity, and fostering national pride—to young viewers.

Respondents agreed on both fronts, with 65% agreeing Canadian content is important for young Canadians and 62% believing it provides them with a cultural benefit. Respondents from Quebec had a higher opinion on the importance and value of Canadian content than the rest of Canada: 70% responding somewhat or very important²⁵ and 65% agreed or strongly agreed²⁶ that Canadian content is helpful for transmitting Canadian values.

The Ipsos data looked at subsets of respondents. Parents had slightly higher rates of agreement, with 72% believing Canadian content is somewhat or very important for young Canadians and 71% agreeing or strongly agreeing it provides young Canadians with cultural benefit. 78% of newcomers to Canada, defined as those who have been in the country up to 5 years, said it is somewhat or very important to have Canadian-made content for Canadians aged 2–17, compared to 64% of non-newcomers. 78% of

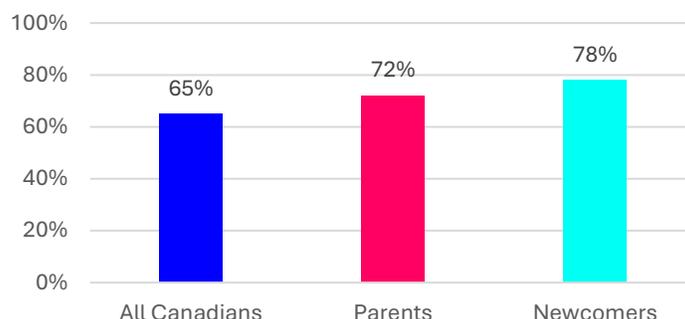
²⁵ The next highest was Ontario at 68%; the lowest was Alberta at 57%.

²⁶ The next highest was British Columbia at 64%; the lowest was Saskatchewan/Manitoba at 51%.

newcomers agreed or strongly agreed that Canadian content provides young Canadians with a cultural benefit; 61% of non-newcomers held the same opinion.

Results were also reported by generation. The youngest generation, Gen Z, was more likely than three older generations (Millennials, Gen X, Boomers)²⁷ to believe that available Canadian content is somewhat or very important (79%, 64%, 65%, and 62% respectively).

FIGURE 14: HOW IMPORTANT IS IT TO YOU THAT CANADIAN-MADE CONTENT FOR YOUNG PEOPLE IS AVAILABLE ON TELEVISION AND DIGITAL PLATFORMS?



Key Takeaways from the Children/Youth Research

Chapter 2 highlights significant challenges in CY content production in Canada, driven by funding gaps and shifting viewing habits. Key takeaways include:

1. Challenges and Financing Gaps with Canadian Broadcasters

Canadian broadcasters are commissioning less CY content and offering minimal licence fees, creating unsustainable financing structures. Declines in broadcaster commissions are substantiated, and CY channels like VRAK, Yoopa, and TELETOON have closed due to industry challenges and increased competition from global streaming platforms.

2. Global Shift in Viewing Habits

Younger audiences are moving away from linear TV to global streaming platforms and YouTube, making traditional content-delivery methods less viable. To remain relevant and effective, there should be a concerted effort and strategic path towards funding CY content that aligns with where kids are currently consuming media.

3. Desire for Dedicated Funds

The reliance on Canadian broadcasters for triggering CMF funds is limiting. For nearly a decade, CMF targets for CY content have not been met, and data indicates that the gap is widening. Producers are calling for direct access to funds and enhanced protections for CY content. There is a desire for new approaches to achieve the CMF's allocation targets, including expanded triggers.

²⁷ Ipsos defines generations as follows: Gen Z, 1996–2012; Millennials, 1980–95; Gen X, 1966–79; and Boomers, 1945–65 (Ipsos, “We need to talk about generations,” April 2023, https://www.ipsos.com/sites/default/files/ct/publication/documents/2023-04/Ipsos_We_need_to_talk_about_generations.pdf).

4. Cultural Importance

Research suggests that 7 in 10 Canadian parents and nearly 8 in 10 newcomers to Canada see Canadian CY content as vital for promoting culture and Canadian values. There is also a strong consensus (95%) among producers on the importance of CY content in preserving language and cultural identity for all language markets. However, many producers feel the current system does not adequately support these goals, particularly when it comes to broadcasters.

5. Funding Gaps and Competing on the World Stage

As the demand for high-quality content grows globally, Canadian producers face challenges due to high production costs, particularly in animation. There are concerns that the quality of content financed by the CMF is low, partly due to the constraints of the existing system. Additional development funding and flexible structures could help creators better compete on the world stage and increase potential for ROI.

Chapter 3: One-Off Documentaries

“If the CMF can bring steamers under jurisdiction ... it would usher in an all-time documentary era out of Canada. If they can additionally relax some of the Cancon and CAVCO regulations around CMF funding, Canadians could work internationally in a more genuine, productive ... manner.”

— Respondent, CMF Documentary Producers Survey, July 2024

“Too many rules and administrative and financial requirements from the CMF. Subjugation to TV broadcasters. Federal policies of the last 15-20 years have hurt the evolution... of author-driven, point-of-view documentaries and those who produce them.” [translation]

— Respondent, CMF Documentary Producers Survey, July 2024

Documentary is one of the four content genres the CMF is mandated to support. In recent years, the Canadian documentary community has voiced concerns that commissions for one-offs and feature-length documentaries had precipitously declined, endangering financing opportunities. For this report, “one-offs” include the following three CMF formats within the documentary genre: one-off, feature-length, and feature film, and excludes series, mini-series, and pilots. The purpose of the study was to understand how the CMF’s role in one-offs has evolved over time, current needs and preferences of Canadian documentary producers, and what CMF changes might be most valuable to best support them, especially those working in one-offs.

Secondary Data Analysis: Boom and Gloom

Globally and in Canada, the story of documentary one-offs appears to reflect a similar duality—boom and gloom—with streaming seen as culpable for both trends. Audiences for documentaries have migrated to online platforms and streamers, which has reduced linear broadcast audiences. In Canada, diminished broadcast commissions are perceived to have impacted one-off financing opportunities.

Global

Recent data on the documentary genre shows a boom that appears to have resulted from increased viewership during the pandemic lockdowns that has not abated. The current moment has been called a “golden age of documentary filmmaking” and the genre an “entirely new entertainment vertical [that] has opened its doors.”^{xlv} *The Hollywood Reporter* noted that from January 2019 to July 2022, Parrot Analytics had reported that the number of streaming documentaries had increased 77%.^{xlvi} Another report projected the global documentary market, currently at \$11.7B, will increase by a compound annual growth rate of 5.8% to \$16.1B by 2030.^{xlvii}

At the same time, reports also suggest gloom around the market for one-offs. As an example, in April 2024, Participant, the American company founded by Canadian Jeff Skoll, which won 21 Academy Awards including four for Best Documentary (e.g. *Inconvenient Truth*), shut its doors. In his memo to staff, Skoll cited the “revolutionary changes in how content is created, distributed, and consumed.”^{xlviii}

There is evidence that financing one-offs has always been a challenging business proposition. Reports as far back as 2008^{xliv} and 2012^l have noted the challenge of financing documentary one-offs, with one filmmaker calling it a “treasure hunt.”^{li}

Canada

A similar story about documentaries is reflected in Canada: boom and gloom.

As for good news, the Documentary Organization of Canada (DOC) noted an audience boom in their 2023 *Getting Real 7* report: “viewership of Canadian documentaries has been on the rise” and that “streaming ... further supported this renewed interest.”^{lii} A 2023 Statista report found documentary to be the second most popular streaming genre among streaming viewers in Canada, behind comedy, but ahead of five other categories.^{liii}

On the commissioning side, when speaking about streaming, an interviewee in *Getting Real 7* noted more good news, calling the documentary boom a “renaissance for the genre.”^{liv} The report predicted the “broadcast-driven system that has shaped multiple generations of Canadian documentary production is thus coming to a close, and a new frontier awaits,” implying that integration of global streamers, per the *Online Streaming Act*, will expand documentary financing opportunities.

There is also not-so-good news. Etan Vlessing, reviewing *Getting Real 7* in *The Hollywood Reporter*, cited the key problem being the gap between one-offs and series.^{lv} In the article, Sarah Spring, the Documentary Organization of Canada’s executive director, is quoted as saying: “When we talk about documentary production in Canada, we are increasingly talking about series.” *Getting Real 7*²⁸ indicates that between 2016 and 2021, the number of single-episode one-offs decreased by 34%, while the number of series projects increased by 75%, a 109-point spread.^{lvi}

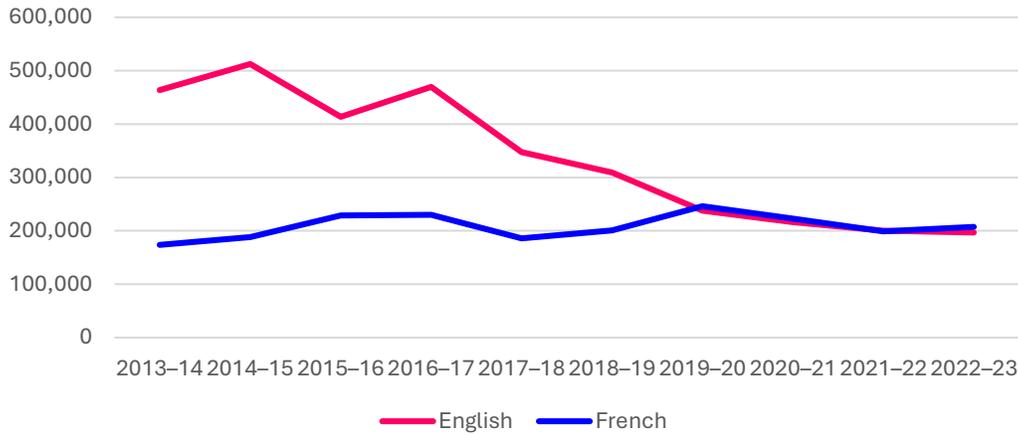
Other evidence of a Canadian dilemma in one-offs includes the 2024 troubles of Hot Docs, Canada’s largest documentary festival. Pat Mullen, the publisher of *POV Magazine*, noted that the chaos is “a symptom of wider uncertainty and a quiet but growing panic in the feature-length documentary world” and that “the streamers have totally taken over.”^{lvii}

CMPA data confirms the boom/gloom dichotomy. Reflecting the boom, during the past five years (2017–18 to 2022–23), the documentary genre grew by 104% in volume, leading industry growth.^{lviii} However CMPA data also suggests, for their most current year (2022–23), a significant discrepancy between financing plans for English- and French-language documentaries, with English-language documentaries about 15% foreign financing (pre-sales and advances) compared to French-language, 1%.^{lix}

Audience data furthers the nuanced picture. Per below, internal CMF data, based on an analysis of broadcaster-reported THT over the last decade, indicates a continuing drop in legacy broadcast audiences for English-language documentary audiences and a relatively stable audience for French-language documentaries.

²⁸ Data from *Getting Real 7* ends during the COVID pandemic, to which documentary one-offs could have been vulnerable, given small crews, interviews with strangers, and global travel.

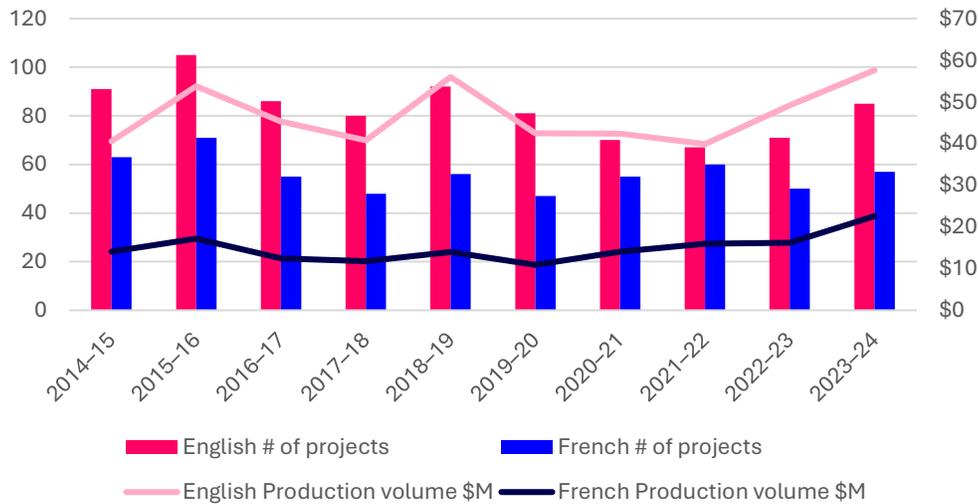
FIGURE 15: BROADCASTER-REPORTED THT (K), DOCUMENTARY CHANNELS, 2013–14 TO 2022–23



CMF Data and Industry Concerns

CMF data shows a post-pandemic rebound in one-off documentaries. Overall, both the number of productions and production volume suggest an evolving or growing landscape for CMF support to this subgenre. However, it is important to note that some industry concerns regarding a perceived decrease in CMF support to one-offs may stem from data that focused on specific time frames that did not fully capture broader trends observed over a longer period.

FIGURE 16: TOTAL NUMBER OF CMF PROJECTS AND TOTAL PRODUCTION VOLUME (\$M) IN ONE-OFF DOCUMENTARIES, 2014–15 TO 2023–24



While in general the CMF’s primary focus is not on feature-length productions, it is noteworthy that, according to the *Getting Real 7* survey, nearly half of all documentary producers who responded to their survey (46%) reported receiving funding from the CMF between 2016–17 to 2020–21. In comparison, only 26% reported that they received funding from Telefilm, and 20% from the National Film Board, which have mandates more aligned with feature-length productions.^{lx}

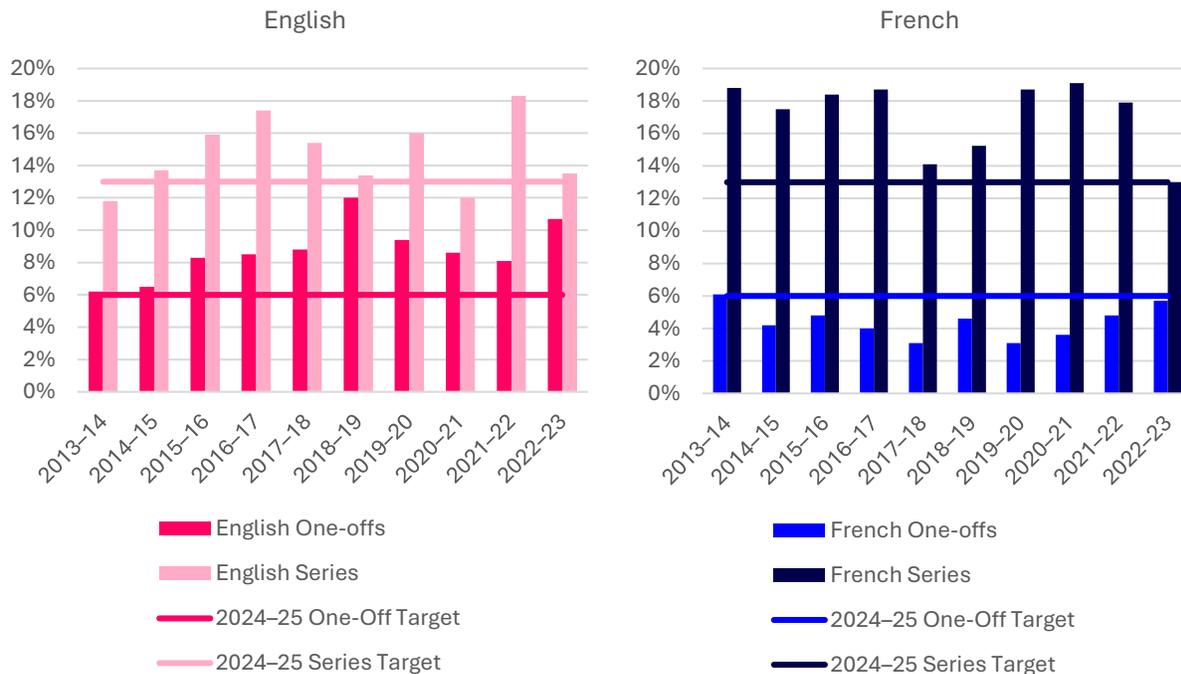
While some signs suggest fluctuations in broadcaster commissions for one-off documentaries, the CMF has maintained consistent support for one-offs—in large part due to its POV program. In fiscal year 2024–25 the CMF adjusted its approach by separating documentaries into one-offs and series, and established new targets as outlined in the chart below.^{lxii}

FIGURE 17: CMF GENRE ALLOCATION TARGETS AND RESULTS, DOCUMENTARIES, 2020–21 TO 2024–25^{lxiii}

Fiscal Year	Documentaries English								Documentaries French							
	CMF Target %		CMF Target \$		Result %		Result \$		CMF Target %		CMF Target \$		Result %		Result \$	
2020–21	16%		\$28.7M		20.6%		\$36.9M		21%		\$19.4M		22.7%		\$20.9M	
2021–22	16%		\$29.5M		26.4%		\$48.6M		21%		\$19.6M		22.7%		\$21.2M	
2022–23	16%		\$29.4M		24.2%		\$44.5M		17%		\$15.7M		18.7%		\$17.3M	
2023–24	16%		\$29.8M		26.0%		\$48.4M		17%		\$17.7M		23.3%		\$24.3M	
2024–25	One-offs: 6%	Series : 13%	One-offs: \$11.3M	Series : \$24.5M	One-offs: -	Series : -	One-offs: -	Series :-	One-offs: 6%	Series : 13%	One-offs: \$6.2M	Series : \$13.4M	One-offs: -	Series : -	One-offs: -	Series :-

The action was commended by the Documentary Organization of Canada (DOC). DOC’s executive director, Sarah Spring, endorsed the CMF’s new guidelines, particularly the obligation to specifically support one-offs: “So when they’re getting their envelope ... they just can’t put it all into series.”^{lxiii}

FIGURE 18: CMF GENRE OUTCOMES VS 2024–25 TARGET, DOCUMENTARY, 2013–14 TO 2022–23



Results from the Documentary Producers Survey

“I would like to see more [entry points] to trigger CMF. There are so few broadcasters, and their commissions are dwindling, so many of us might have to leave documentary.”

— Respondent, CMF Documentary Producers Survey, July 2024

“The problem with the current system is a producer is limited to the access of funding without a Canadian broadcaster. They are limited and should not dictate the inherent value of a show. If you comply with CAVCO regulations, then broadcasters should no longer be a required trigger.”

— Respondent, CMF Documentary Producers Survey, July 2024

Basic Data

There were 326 respondents to the documentary survey. A majority were experienced documentary producers, with 64% having been in the industry for over 11 years, and almost half having produced 7 or more documentary projects.²⁹ Respondents were geographically distributed in percentages that reflect industry norms (28% from Quebec, 72% from the rest of Canada), and were concentrated in Toronto, Montreal, and British Columbia (24%, 20%, and 19%, respectively).³⁰ Taken together, these basic factors support confidence in the survey results.

The data on language of production further supported confidence in the results. In RoC, 93% of respondents stated the primary language of their productions as English, 18% in Indigenous languages, and 17% in French. In Quebec, 91% indicated French as their primary production language, 54% stated English, and 15% Indigenous. In total, more than a third (37%) of respondents noted working in more than one primary language of production (any combination). Notably, respondents also mentioned working in more than 30 languages.³¹

Regarding target audiences, respondents in both Quebec and RoC were focused on domestic and global audiences. Respondents working in RoC were most interested in English-speaking Canada (47%) and globally (38%), whereas respondents in Quebec chose French-speaking Canada (33%) and Quebec specifically (31%) as their target audiences, with global coming in third (20%). About half of those who responded “other” mentioned Indigenous or Northern Canada communities.

²⁹ 43% had produced 7 or more projects, and (52%) had developed at least 7 or more projects.

³⁰ The rest of Ontario and rest of Quebec both had the next highest shares (8% each), and all other provinces or territories were represented in even smaller shares (5% and under).

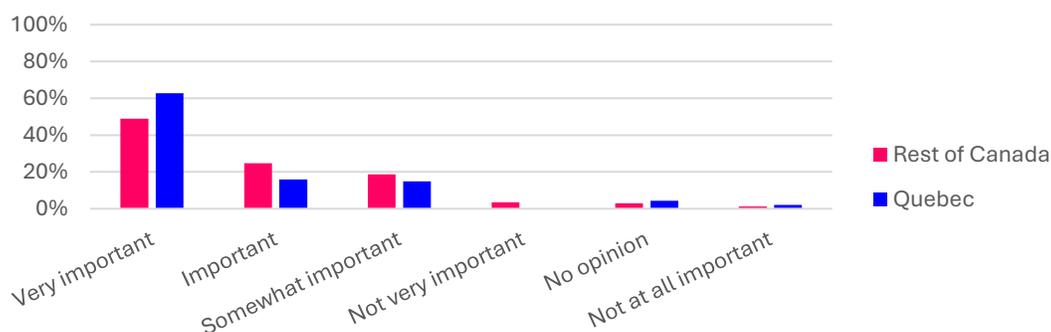
³¹ Respondents noted Amharic, Arabic, Berber, Burmese, Chinese (Cantonese, Mandarin, Hakka, Simplified), Creole, Danish, Dari, Farsi, Filipino, Finnish, German, Hebrew, Italian, Japanese, Korean, Persian, Polish, Portuguese, Romanian, Russian, Serbian, Spanish, Swahili, Tagalog, Turkish, Ukrainian, Urdu, Vietnamese, Yoruba.

Culture and Diversity

Respondents were definitive on the importance of the documentary genre to preserve language and reflect cultural identity, with 93% of all respondents reporting this as at least somewhat important. Notably, a higher percentage of Quebec (76%) than RoC (57%) reported that it is “very important” to preserve language and cultural identity.

Respondents were also clear on the importance of the documentary genre as an entry point for new and underrepresented filmmakers, with 93% reporting this as at least somewhat important.

FIGURE 19: HOW IMPORTANT IS DOCUMENTARY FILMMAKING IN SERVING AS AN ENTRY POINT FOR NEW AND UNDERREPRESENTED FILMMAKERS?



Budgets

For context, CMPA’s *Profile 2023* suggests that in the last decade (2013–14 to 2023–24) *average* documentary budgets increased 24%.^{lxiv} In the same time frame, *median* budgets increased 17%. The similarity of these two data points suggested the possibility of an across-the-board cost increase.

Survey results appear to confirm an across-the-board cost increase. Results were similar across the country; when asked where the largest increases occurred, 35% of respondents chose “below-the-line-labour”³² and 22% chose “travel/accommodations.”³³ The third largest category, “other” (13%) was revealing, with more than half of the responses suggesting all options had increased and nearly a third identifying more than one of the listed options in various combinations; 10% of the “other” respondents indicated interim financing was the biggest increase. One respondent succinctly identified a key problem: “All costs are up, yet broadcast licences have stayed the same in over 10 years.”

- “No time slots, weak licenses, exorbitant interim financing costs, a weak dollar... our costs (insurance, financial costs of all kinds) make us uncompetitive.” [translation]
- “Speaking specifically regarding more regional documentaries, the broadcast licenses tend to be way below the license fee threshold, forcing the budgets to remain low due to lack of financing options with the CMF.”
- “A producer may get a broadcaster onboard who meets threshold and triggers CMF funding but the licence is small which dictates a smaller budget. If a producer can raise more licence or private funding, which increases the budget, it shouldn’t throw off the licence fee threshold

³² 31% RoC, 47% Quebec

³³ 26% RoC, 11% Quebec

from the original broadcaster and allows the producer to have a higher budget for better production values.”

- “Currently only TVO, Crave, and CBC can trigger the budget levels that I work on. Lowering the threshold might have allowed AMI to trigger a documentary I was doing on disability.”
- “The problem with thresholds is they limit the amount in the budget. Producers should not have to slash their budgets just to be able to make threshold.”
- “As budgets continue to grow due to higher costs for production labour, travel, post production, accounting, legal, insurance etc. it becomes increasingly difficult to secure enough financing to make a quality documentary or series. I have had to defer my producer fees to pay my crews, editors and professionals (lawyers, accountants). Five years ago you could make a quality one-off documentary for \$250,000. Now you need \$500-\$750,000.... I think it would be helpful to allow a certain percentage of the budget to be secured from sources such as foundations, third part investors, and non-Canadian broadcasters (as a second window).”
- “Marketing and promotion are too capped in the budgets, especially since it’s often the producers who invest in them, instead of the broadcasters and distributors.” [translation]

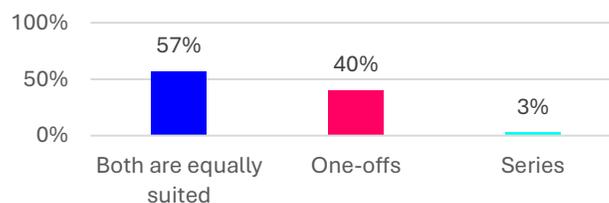
One-Offs vs Series

Most respondents indicated they create both one-off documentaries and documentary series (94% vs 71%, respectively). While the majority said they create author-driven, culturally relevant documentaries (87%), just over half (54%) also said they create market-driven, commercially relevant ones.

When asked which format lends better to author-driven, culturally relevant documentaries—one-offs or series—57% said both formats are equally suited.³⁴ Per below, this result appears to suggest that, for many respondents, the paradigm may be doubly flawed: (1) respondents consider format, whether one-off or series, to be independent from cultural relevance, and (2) respondents do not consider cultural relevance and market-driven to be mutually exclusive:

- “The genre definition excludes projects that are currently in demand internationally. It lacks flexibility, which puts a brake on the production of documentary formats with export and adaptation potential.” [translation]
- “I create culturally relevant documentaries that hopefully have a broad appeal.”

FIGURE 20: WHICH FORMAT (ONE-OFF OR SERIES) LENDS BETTER TO AUTHOR-DRIVEN, CULTURALLY RELEVANT TOPICS?



When respondents were asked how effectively the CMF serves producers of one-offs and series, a majority—61% working in one-offs, 57% in series—responded either very or somewhat effectively.³⁵

³⁴ 60% RoC, 49% Quebec

³⁵ 55% RoC, 62% Quebec

POV Program

Four questions examined the CMF dedicated funding for one-offs—the POV Program—a selective program outside the Broadcaster Envelopes. Per below, the demand for POV has consistently outweighed supply, even during the COVID pandemic.

FIGURE 21: POV PROGRAM 2019–20 TO 2023–24^{lv}

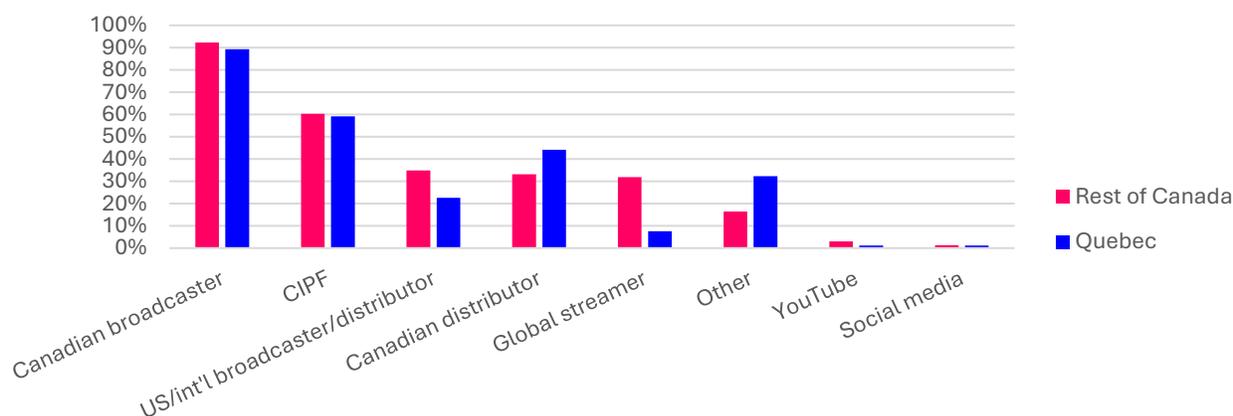
	2019–20	2020–21	2021–22	2022–23	2023–24
Total POV Budget (\$M) ³⁶	\$4.6M	\$4.6M	\$4.8M	\$7.1M	\$8.5M
CMF-Funded % of Total Ask	30%	36%	32%	52%	45%
Oversubscription Rate	3.3x	2.8x	3.1x	1.9x	2.2x

The POV survey questions began by asking whether respondents had ever applied to POV, with results being 48% yes, 44% no, and 9% reporting unfamiliarity with POV.³⁷ Another question examined POV’s efficacy in meeting respondents’ needs, with an overall effective rating of 66% (either somewhat or very). However, there was a significant variation between the responses on effectiveness from Quebec and RoC (89% Quebec vs 55% RoC). When asked to explain their reasoning, a key theme of the 53 responses was that the requirement for a broadcaster is out of step with current market realities.

Financing and Triggers

The heart of the survey was a series of questions examining documentary financing, including an exploration of what new financing sources might trigger public funding. When respondents were asked to choose their top three financing choices, the answers were clear: (1) Canadian linear broadcasters (91%), (2) Canadian Independent Production Funds (CIPFs) (60%), and (3) distributors, with the qualification that RoC was about equally split between a Canadian (33%) and an international distributor (35%), while Quebec’s third choice was just a Canadian distributor (44%). Per below, neither global streamers nor ungated platforms made the top three.³⁸

FIGURE 22: WHICH SOURCES ARE YOUR TOP THREE PRIORITIES FOR SECURING FINANCING FOR DOCUMENTARIES, EXCLUDING TAX CREDITS AND THE CMF?



³⁶ In 2019–20, 2021–22, and 2022–23, the POV Program was only offered in English

³⁷ 44% RoC, 58% Quebec for yes, 47% RoC, 35% Quebec for no

³⁸ While 32% of RoC did choose global streamers, close to third place, only 8% of Quebec did

A number of respondents (21%) also chose “other,” and comments confirmed the availability of numerous public funds for this genre.

Two questions inquired about respondents’ prior use of global streamers, crowdfunding, and ungated platforms in financing. The answers were overwhelmingly “no,” indicating limited experience with these options. Of those who provided explanations, several expressed challenges around the competitiveness of working with a global streamer. Crowdfunding was seen as too time-consuming and not very profitable, and ungated platforms were seen as difficult to monetize.

Canadian Broadcaster

Respondents were definitive on the advantage of financing with a linear broadcaster: 86% selected the ability to trigger other financing. Remaining options were in single small digits (don’t acquire copyright ownership, trigger international co-productions, understand cultural significance, no advantage, other).

Respondents were also definitive on the disadvantage of a linear broadcaster. 55% chose the limited number of linear broadcasters (with a higher percentage coming from RoC at 61%; only 40% of Quebec chose this response). Notably, “other” was the second highest disadvantage (14%), with 46 responses expressing frustration about the current system; the third highest disadvantage (9%) was the high licence threshold.

- “There should be a select all button for this! The biggest disadvantage is the limited number of broadcasters and how little they are giving for licenses these days - the high license threshold is making it more and more difficult to achieve because of the first two problems.”
- “Canadian broadcasters are timid and conservative. They kill creativity and diversity of viewpoints and opinions. The obligation to have a TV license greatly reduces diversity of expression and opinion, and contributes to the impoverishment of content.” [translation]
- “Broadcasters’ general disinterest in documentaries, no longer willing to license documentaries to allow us access to the CMF.” [translation]

Canadian Distributor

Respondents were also definitive on the advantage of a Canadian distributor: 58% chose the ability for distributors to contribute to CMF eligibility, and 15% chose their close relationship to global audiences. Only 4% chose that it does not create problems with Canadian copyright.

Responses to the disadvantage of a Canadian distributor were more varied, yet a plurality (42%) chose the inability to trigger financing on their own. 19% chose recoupment terms and 14% no disadvantage.

Notably, comments in the “other” section appear to unlock an important element of the story of Canadian distributors: their overlapping financial interests with broadcasters, the conflict being that if a project is already sold to a Canadian broadcaster, the distributor cannot make that sale. It appears that without a Canadian sale, Canadian distributors don’t offer significant advances, so it could be more valuable to have each financier able to trigger on their own. Moreover, having a Canadian distributor cuts off some international distribution opportunities. Numerous comments, to this and to other survey questions, surfaced the conflict of interest between broadcaster and distributor:

- “Distributors can sell to broadcasters so why not involve them from the beginning and trust their ability to accompany author driven films to maybe be sold afterwards.”

- “Very difficult to reconcile with TV requirements with the exclusivity windows requested.” [translation]
- “A model that elevates Canadian distributors into the realm of eligible triggers would be extremely helpful. Especially since there is already an inherent awkward fit with broadcasters and distributors when pairing CMF POV and Telefilm Theatrical Doc Fund.”

Global Streamer

Responses to the advantage of global streamers appear to underscore respondents’ appreciation for the connection between audience and money. 41% chose access to large audiences and 32% chose more money as the main advantage. The next largest advantage was “other” (11%), with key themes in the comments being the streamers’ audience-based business model and respect for story, a key-audience-building feature:

- “More money, one stop-shop means being able to focus on making [the] project, not [being] constantly in financing mode.”
- “One stop shopping - if they pick it up - they cover the entire budget.”
- “They tend to look at story more, rather than putting identity politics before all else.”
- “Greater respect for regional stories than Canadian colonial-minded broadcasters.”

Responses to the main disadvantage to financing with a global streamer were more varied, with significant differences between RoC and Quebec. RoC’s top three were: (1) inability to trigger CMF eligibility (26%), (2) possible requirement to sign over copyright (22%), and (3) global competition for commissions (20%). Quebec respondents seemed less concerned about copyright, and their top three disadvantages were: (1) global competition for commissions (37%), (2) inability to trigger CMF eligibility (23%), and (3) “other” (12%). Of the “other” responses, across both Quebec and RoC respondents, several noted having no experience with global streamers, a sentiment which also came through in the qualitative responses about the advantages of streamers.

Ungated Platforms

Respondents’ top choices for the main advantage of ungated platforms were free, easy access to global distribution (25%) and direct connection to audiences (25%).³⁹ 22% noted no advantage. Of the “other” responses (12%), nearly all indicated no experience with ungated platforms.

As for the main disadvantage of the ungated platforms, 84% chose answers reflecting the challenge of return on investment: 45% chose the need to self-fund production, 33% chose the challenge of attracting a monetizable audience,⁴⁰ and 6% the need to self-fund marketing.⁴¹ As in advantages, most of the 12% “other” responses indicated a lack of experience with ungated platforms.

Top Trigger Flexibilities

The final two questions of this series asked which potential CMF trigger flexibilities would be most useful for financing one-off auteur point-of-view documentaries and why. Per below, both RoC and Quebec chose the same top three, but in different order: global streamers (23% RoC vs 15% Quebec),

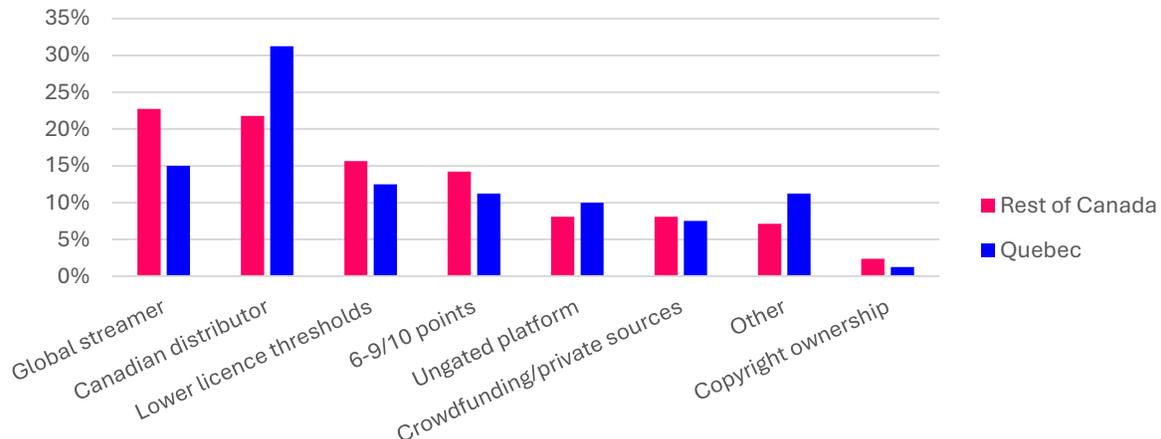
³⁹ 23% RoC, 30% Quebec

⁴⁰ 36% RoC, 26% Quebec

⁴¹ 4% RoC, 10% Quebec

Canadian distributor on their own (22% RoC vs 31% Quebec), and lower licence fee thresholds (16% RoC vs 13% Quebec).

FIGURE 23: WHICH POTENTIAL FLEXIBILITY, IN TERMS OF ELIGIBILITY FOR CMF FUNDING, WOULD BE THE MOST USEFUL FOR YOUR ABILITY TO FINANCE ONE-OFF, AUTEUR POINT-OF-VIEW DOCUMENTARY PROJECTS?



When asked to explain their choices, respondents had many reasons:

- “Very good opportunities online can be more than excellent... but are overlooked by FMC, or simply not eligible. That is a big throwback for authors and creators.”
- “That foreign licenses allow us access to the CMF as long as the producer and the project are Canadian. Reduce the requirement for the CAVCO points system. Lower the threshold requirements.” [translation]
- “A selective measure where submitted projects could receive approval and funding without an attached broadcaster.” [translation]
- “A co-production with the NFB could trigger eligibility for funding.” [translation]
- “Broader Audience Reach: YouTube and similar platforms have vast, global audiences. Releasing a documentary on these platforms can significantly increase its visibility and reach a wider audience without the limitations imposed by traditional broadcasting.”
- “Being able to access writers, DOPs and narrators that are not Canadian can raise the attractiveness of a project to the international marketplace and make it easier to raise funds outside of Canada to support Canadian productions.”
- “Having access to the CMF for projects that have obtained funding from ‘alternative sources,’ such as a for-profit organization, but for which the production company has partial or no copyright, would allow documentaries to continue to be produced.” [translation]

Copyright Ownership

Copyright ownership remains a relevant consideration in discussions about modernizing the Canadian content system. When respondents were asked what percentage of their projects did not have CMF support, they reported 38%. However, the data on copyright ownership, when asked in the context of trigger expansion, was one of the survey’s most notable findings. A negligible percentage of respondents (2%) chose copyright ownership flexibility as their top potential funding trigger. In contrast, around the world, IP ownership flexibility is a key feature of content modernization. Respondents said:

- “Keeping copyright ownership 100% is absolutely critical.”
- “I believe that CMF applicants should own the copyright to their projects.”

When asked about how various requirements impact producers’ ability to work with CMF, copyright ownership was also notable: 46%⁴² said the CMF requirement for 100% copyright ownership was a great or small advantage, with “great advantage” being the largest share (29%).

A disconnect in these responses seems that a recent study of 10 other peer countries^{lxvi} found that all have implemented IP ownership flexibility as a feature of modernizing national content. The report argued that a flexible approach to IP ownership is in the financial best interest of Canadian producers:

“The current system was developed in an earlier ... environment when broadcasting was largely a closed system. But the broadcasting system is no longer closed.... Remove current copyright ownership requirement as a determinant factor, providing Canadian producers with the flexibility to decide with financing partners the best business deals for their ... companies.”

Canada Media Fund

While many survey questions concerned the CMF, several probed topics specific to its operations.

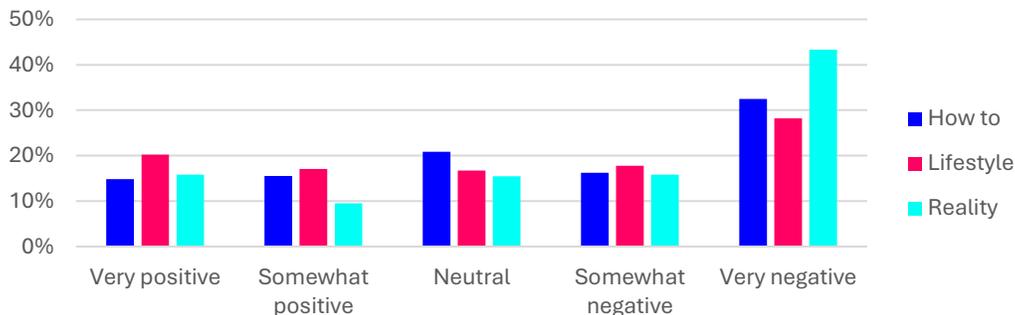
Advantages/Disadvantages of the CMF

Respondents were asked whether certain CMF requirements, in addition to copyright ownership, were an advantage or disadvantage to working with the CMF: broadcast licence, 10/10 points, and guidelines and application process. Requirements for a broadcast licence and 10/10 points were seen as most disadvantageous (62% and 41%, respectively). Results on the CMF guidelines and application process were relatively evenly split between advantage (32%), disadvantage (31%), and neutral (36%).

Eligible Documentary Content

Respondents did not strongly advocate for changing the CMF definition of eligible documentary content.⁴³ 59% responded negatively to expanding the definition to include “reality”⁴⁴ and nearly half responded negatively to “how to” and “lifestyle” (49% and 46% respectively). A follow-up question found that 55% said that current definitions of documentary do not hinder international competition.

FIGURE 24: WHEN CREATING DOCUMENTARY SERIES, HOW WOULD YOU VIEW AN EXPANSION OF THE CMF’S LIST OF ELIGIBLE CONTENT TO INCLUDE “HOW TO,” “LIFESTYLE,” AND “REALITY”?



⁴² 42% RoC, 57% Quebec

⁴³ Found in the CMF’s Appendix A, Definition & Essential Requirements document

⁴⁴ 57% RoC, 67% Quebec

Aligned with the quantitative data, themes in the qualitative responses reflect a belief that public funds aren't required in thriving subgenres and a desire to avoid increasing competition for funding. However, some respondents expressed interest in expanding the definitions to support internationally viable unscripted formats.

Other Supports and Resources

Lastly, respondents were asked what other support or resources they would like to see from the CMF. A thematic analysis showed that many respondents supported lowering broadcaster licence fee thresholds. Some suggested ensuring terms of trade between producers and broadcasters, and a few emphasized the need for marketing and distribution assistance.

Key Takeaways from the Documentary Research

Chapter 3 examines the persistent financing challenges for Canadian one-off documentary producers, along with the influence of global streamers on audience engagement. Key takeaways include:

1. The CMF's Role

Despite industry claims of reduced support for CMF-funded one-off documentaries, data shows stability (or growth), with a rebound following a dip during the COVID-19 pandemic. The CMF has maintained its targets relatively well over the past decade and has signaled increased commitment to one-off documentaries in its 2024–25 guidelines.

2. Dual Trend (Boom and Gloom)

While there is a “golden age” of documentaries driven by increased streaming viewership, the market for one-off documentaries is facing challenges, particularly in financing. The rise of streaming platforms has led to declining audiences on linear broadcasters—the most critical trigger to unlock other funding.

3. Challenges with Current Financing Models

The requirement for a Canadian broadcaster to trigger CMF funding is increasingly seen as outdated, given the evolving market realities. Documentary producers expressed frustration with the limited number of broadcasters, the high licence thresholds, and the challenges in securing adequate financing under the current system. There is a call for more flexibility in financing triggers.

4. Importance of Documentary

The documentary genre is an important entry point for new and underrepresented filmmakers, with a strong emphasis on preserving cultural identity. Documentary producers did not universally perceive a clear distinction between author-driven, culturally relevant content and the format of one-off vs series. This challenges the assumption that such qualities are exclusive to one format. Most respondents (65%) reported working in both one-offs and series.

5. Streamers and Distributors

Global streamers offer large audiences but might require flexible IP ownership by producers. While there is interest in incorporating them as potential triggers, producers generally have

limited experience working with them. Distributors offer crucial market access but don't offer significant advances. Canadian distributors' first stop would be a sale to a Canadian broadcaster, but if that sale is already made, there may not be any financial advance to the producer.

Chapter 4: Observations and Considerations

Our findings indicate that traditional funding structures, particularly those tied to linear broadcasting, may no longer be sufficient on their own to fully support the evolving needs of Canadian producers.

The CMF's reliance on broadcasters as the only trigger for funding has resulted in a disconnect between the opportunities presented over the past ten years and the funding mechanisms available to Canadian content creators.

This disconnect is particularly acute in the CY genre where the shift to digital platforms has been most pronounced. While the survey findings present a compelling case for change, any proposed actions must also account for industry realities, including the likelihood of a declining CMF Program budget over the next few years.

Three Considerations

The research findings lead to three main program considerations for the CMF:

- 1. Establishing a dedicated program for Canadian CY content.**

The current trends and data indicate that without such a measure, the CMF is unlikely to meet its CY genre allocation targets.

Similar to the POV Program, which is a dedicated program for documentary one-offs outside of the Broadcaster Envelopes, a dedicated CY program could provide a structured approach to encourage and support Canadian-made productions.

The case for a dedicated CY program is strengthened by several key observations. The shift in viewing habits toward streaming platforms and mobile devices has notably impacted linear broadcasting, with BDUs now contributing less than 40% of CMF funds. Despite this, BDUs retain access to 60% of funding through the envelope system. Allocating a portion of this 20% margin to the proposed program might better align funding with contemporary needs while also advancing the CMF's program objective—helping the Canadian content production ecosystem remain healthy and vibrant—without significantly altering the existing structure.

Moreover, this program might have separate components for development and production. It might set targets for animation and live action. It should also consider expanding eligibility triggers as a pilot beyond traditional broadcasters to include Canadian distributors, global streaming platforms, and Canadian-owned YouTube channels with a proven track record (e.g. a minimum threshold for subscribers or views). This broader eligibility, potentially in tandem with lower thresholds, could enhance the reach and impact of Canadian CY content and begin to meet audiences where they are.

Greater collaboration with global streamers may align with CMF's objectives as a program of PCH by potentially addressing current gaps in the production ecosystem and fostering diverse content development. Moreover, it supports the desired intermediate outcomes by ensuring the competitiveness and growth of Canada's audiovisual sector and return on investment for Canadian producers. Adapting strategies to incorporate global streamers—even if just as a pilot project—would be vital for maintaining the relevance and success of Canadian content in Canada and on the global stage.

To further solidify the impact of a dedicated CY program, the CMF could consider implementing market incentives or market tests to ensure that the content produced not only meets high-quality standards but also resonates with CY audiences. As Patricia Hidalgo, director of BBC Children’s & Education, notes, “for public service content to matter, it has to be watched. It has to have an impact and it has to be relevant, which means getting the magic elixir of inform, educate and – especially – entertain exactly right.”^{lxvii} The BBC’s success in transitioning away from linear channels, which led to an increase in viewership, underscores the importance of aligning content with audience preferences and meeting them where they are. Hidalgo emphasizes “there is no point making things if they won’t land with the audience.”^{lxviii}

This report also references recent research showing that 10 other peer countries all have IP ownership flexibility; the survey data suggests the possibility of misunderstanding in the industry. Public investment aims to benefit Canadians, and while 100% Canadian IP ownership is ideal, allowing flexibility or a proportional share would still effectively advance the CMF’s objectives and increase ROI for producers. Leveraging a portion of significant funding is more beneficial than retaining full control over content that has little opportunity for development, distribution, or monetization.

2. Continuing to monitor and assess the performance of one-off documentaries.

Documentaries serve as important vehicles for new and underrepresented storytellers. This aligns with the CMF’s objectives, which emphasize promoting diversity and supporting new recipients as desired outcomes. It is essential to maintain our commitment to support and consult the documentary community to ensure these voices continue to thrive.

Despite concerns about potential reductions in CMF-support to one-offs, data indicates that CMF-supported documentaries have not experienced substantive declines. In fact, there has been relative stability and growth since the pandemic. In 2024–25, the CMF signaled a stronger commitment by separating one-off documentaries from the general documentary category targets. Survey respondents in *Getting Real 7* noted receiving support from the CMF at roughly double the rate of Telefilm or the National Film Board. This demonstrates the CMF’s commitment and partnership with the documentary community.

The CMF’s ability to sustain support for one-off documentaries, even as linear broadcaster audiences have shifted to other platforms, is likely due to the dedicated POV Program. This program has consistently increased its funding but has maintained a high oversubscription rate. It plays a crucial role in allowing the CMF to support a diverse range of applicants and uphold the cultural significance of documentaries.

Although the industry has strongly expressed that requiring a broadcast licence is counterproductive, the program’s consistent oversubscription makes it challenging to recommend expanding triggers at this time. For now, the CMF should continue to monitor benchmarks to assess the effectiveness of current measures and ensure the ongoing support of this genre and one-offs in particular.

3. Exploring alternate financing as a contributor to licence fee thresholds.

The current reliance on broadcaster involvement as the sole trigger for CMF support may no longer fully reflect the evolving media landscape. While Canadian distributors can now contribute to licence fees,

they must still collaborate with Canadian broadcasters. Both CY and documentary producers have expressed interest in incorporating alternate sources of financing, such as contributions from distributors or foreign pre-sales, into the licence fee threshold formula. Allowing more types of financing to count towards the threshold or trigger CMF-funds could offer a flexible and modernized approach.

This adjustment would align with one of the CMF's program objectives: fostering diversified market investment, meaning a mix of public and private contributions, and increased participation from the private sector. By recognizing alternate investments in the licence fee formula, the CMF could potentially strengthen the financial viability of Canadian productions and reduce the reliance on traditional funding sources. This approach may also support innovation, as private investors like distributors are often motivated by the potential for high-quality content that might sell abroad. While this shift would require careful consideration, it could help address industry concerns and align with broader goals of fostering a more resilient and competitive sector.

Conclusion

The considerations outlined in this report are grounded in research, data analysis, and insights from industry stakeholders. While they provide a solid foundation for addressing challenges facing Canadian content, they are not guarantees of success. However, they could be important first steps towards adapting to the evolving media landscape and ensuring the continued vitality of Canadian storytelling. By reviewing these considerations and remaining open to ongoing evaluation and adjustment, the CMF can better position the industry for future growth.

Appendix A: Methodology

The study used a sequence of data-driven approaches to answer the question of how well the CMF is serving Canadian producers of children/youth content and one-off documentaries.

To begin, an examination of secondary data was undertaken for each genre, qualitative and quantitative. A literature review for each genre included research studies, public media, and industry and policy reports, including Canadian and international documents dating back more than a decade and up to the present. Data review and analysis for each genre focused on Canadian data—both internal CMF data and external data, including from PCH, CRTC, CAVCO, industry reports from organizations such as the Canadian Media Producers Association (CMPA, *Profile*) and the Documentary Organization of Canada (DOC, *Getting Real 7*), and news sources. To understand the global context, data was also pulled from non-Canadian sources.

The CMF logic model, which PCH uses to evaluate the CMF, also informed the methodology. The model has goals and targets, to which CMF submits performance indicators. The goals are organized longitudinally as immediate and intermediate. This research is directly aligned with four of the logic model goals. Its core mandate to understand how best to seize opportunities amidst change is explicitly aligned with the CMF's ultimate goal: to help ensure a competitive, resilient sector.

- **Immediate:** “Evidence-based strategies are implemented to address gaps in the production ecosystem”
- **Intermediate:** “Canada’s audiovisual production ecosystem fosters success for Canadian audiovisual content”
- **Intermediate:** “Return on investment supports the maintenance or growth of the Canadian audiovisual sector”
- **Intermediate:** “Canadian content and the ecosystem in which it is produced is representative of Canadian diversity”

In order to understand the current realities, it was necessary to undertake an on-the-ground understanding of the CMF's stakeholders, i.e. how Canadian producers view the current ecosystem and what policy changes would be most valued. Primary data was gathered through two original surveys, one for children/youth (CY) producers and the other for documentary producers—each survey available in English and French. Questionnaires were designed to examine the key question—how the CMF can better serve producers—including many nuances suggested by the secondary data analysis. The CY and documentary surveys were launched in June 2024. Data collection lasted three and a half weeks per survey.

The samples for each survey were derived from an internal list of CMF-supported companies in each genre over the last 10 years (2013–14 to 2023–24). Given that many companies have since closed and/or the contacts we had no longer work there, it was acknowledged that this list would not represent the full universe of all Canadian producers in either genre, but would sample companies/professionals who were familiar with the Canadian content system.

The **CY survey** was successfully distributed to 578 potential respondents, 400 on the English side and 178 on the French side, representing approximately 425 discrete companies.⁴⁵ There were 154 overall respondents, a 27% response rate. There were 114 English-language respondents, representing a 29%

⁴⁵ The exact number of companies cannot be known, as not all email addresses were valid and many were Gmails, meaning multiple people could have been representatives of the same company and we would not know.

response rate for English and 40 French-language respondents, representing a 22% response rate for the French side. To note, these percentages are the most conservative estimates, as not all unmanned email addresses (i.e. for companies that no longer exist or for former employees of a company still on the CMF list) would bounce, making the true response hard difficult to gauge.

The **documentary survey** was successfully distributed to 1,142 potential respondents, 776 on the English side and 366 on the French side, representing approximately 894 discrete companies.⁴⁶ The documentary community is understood to be even more entrepreneurial than the CY genre, with many tiny companies, so the larger sample size was expected. There were 326 overall respondents, a 29% response rate. There were 238 English-language respondents, representing a 31% response rate for English and 88 French-language respondents, representing a 24% response rate for French. Similar to the CY survey, these are the most conservative estimates.

Given the entrepreneurial nature of the production industry and high likelihood of job turnover in a decade, emails were updated as best as possible to reflect current company leadership. Multiple emails to a single company were considered an acceptable strategy for a few reasons: (1) to cover for employees no longer at the company, (2) uncertainty as who would be assigned to complete the survey, and (3) in alignment with survey’s goal to solicit on-the-ground opinions of those working in the industry, viewpoints that may or not be consistent through a given company.

A high percentage of bounce backs from the full distribution lists were expected. Indeed, there were 121 bounce backs for the CY survey (17%) and 234 for the documentary survey (17%). There was also a tiny percentage of emails on the distribution list that had opted out of receiving surveys from SurveyMonkey, the software used—13 (2%) on the CY side and 12 (1%) on the doc side. (However, 1 individual who opted out in each genre did, in fact, complete the survey.)

In addition to the initial email with the survey embedded, two reminder emails were sent. The first was sent to anyone who had not yet completed the survey, and the second was sent to those who had still not completed the survey and those who had only partially completed it.

As the results came in, confidence in the survey data was supported by two metrics: (1) answers to individual questions did not significantly alter as the number of respondents increased, and (2) the percentage of respondents working in English-language and French-language content stayed stable at 2/3 (English) to 1/3 (French). The surveys were launched on June 18, 2024 and “officially” closed on Friday, July 12 though were taken down Tuesday, July 16. The breakdown of responses was as follows.

FIGURE 25: SURVEY RESPONSE BREAKDOWN

	Sent	Bounces	Opt-Outs	Successfully distributed	Complete responses	Partial responses	Total responses	Response rate
CY								
EN	486	77	9	400	96	18	114	29%
FR	226	44	4	178	33	7	40	22%
	712	121	13	578	129	25	154	27%
DOC								
EN	936	152	8	776	220	18	238	31%
FR	452	82	4	366	74	14	88	24%
	1,388	234	12	1,142	294	32	326	29%

⁴⁶ The same limitations exist for the documentary survey company count as they did for the children/youth survey.

Endnotes

- ⁱ Government of Canada, “Budget 2018: Equity + Growth, A Strong Middle Class,” February 27, 2018, <https://www.budget.canada.ca/2018/docs/plan/budget-2018-en.pdf>.
- ⁱⁱ Lucia Moses, “Disney has a kid problem,” *Business Insider*, July 15, 2024, <https://www.businessinsider.com/disney-kid-problem-cable-tv-decline-disney-channel-watching-youtube-2024-7>.
- ⁱⁱⁱ Andy Fry, “Commissioning Crunch: Producers Facing Greenlight Dead Zone,” *Playback*, June 4, 2024, <https://playbackonline.ca/2024/06/04/commission-crunch-producers-facing-greenlight-dead-zone/>.
- ^{iv} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3-1, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^v Julia Stoll, “Number of TV cord cutter/cord never households in Canada 2012-2020,” *Statista*, November 10, 2022, <https://www.statista.com/statistics/258444/number-of-tv-cord-cutter-households-in-canada/>.
- ^{vi} Rick Porter, “‘Bridgerton’ and kids help streaming hit all time usage high in June,” *The Hollywood Reporter*, July 16, 2024, <https://www.hollywoodreporter.com/tv/tv-news/streaming-all-time-tv-usage-high-june-2024-nielsen-1235949410/>.
- ^{vii} Sammy Hudes, “More Canadians ditch traditional TV as streamers are ‘winning the battle’: report,” *CP24*, March 25, 2024, <https://www.cp24.com/news/more-canadians-ditch-traditional-tv-as-streamers-are-winning-the-battle-report-1.6821759>.
- ^{viii} Nico Grant and John Koblin, “How YouTube Took Over Our Television Screens,” *New York Times*, July 30, 2024, <https://www.nytimes.com/2024/07/30/technology/youtube-streaming-tv.html>.
- ^{ix} Lucia Moses, “Disney has a kid problem,” *Business Insider*, July 15, 2024, <https://www.businessinsider.com/disney-kid-problem-cable-tv-decline-disney-channel-watching-youtube-2024-7>.
- ^x Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3-1, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{xi} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3-8, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{xii} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3-15, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{xiii} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3-8, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{xiv} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3-16, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{xv} Canada Media Fund internal data
- ^{xvi} Canada Media Fund internal data
- ^{xvii} Canada Media Fund, “Broadcaster Envelope Manual, 2024-2025,” <https://cmf-fmc.ca/document/broadcaster-envelope-manual/>.
- ^{xviii} Canada Media Fund, internal data
- ^{xix} Howard Bilodeau, Abby Kehler and Nicole Minnema, “Internet use and COVID-19: How the pandemic increased the amount of time Canadians spend online,” *Statistics Canada*, June 24, 2021, <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2021001/article/00027-eng.htm>.
- ^{xx} Josh O’Kane, “How decades of hard work – and the rise of Paw Patrol – sent Canadian kids’ TV to millions of screens around the world,” *Globe and Mail*, May 1, 2023, <https://www.theglobeandmail.com/arts/television/article-paw-patrol-leads-resurgence-of-canadas-kids-tv-industry/>.
- ^{xxi} Lucia Moses, “Disney has a kid problem,” *Business Insider*, July 15, 2024, <https://www.businessinsider.com/disney-kid-problem-cable-tv-decline-disney-channel-watching-youtube-2024-7>.
- ^{xxii} Ben Bowman, “Demand for children’s content surges - can anyone catch Netflix?,” *Streamable*, January 10, 2022, <https://thestreamable.com/demand-for-childrens-content-surges-can-anyone-catch-netflix>.
- ^{xxiii} Katie Knibbs, “The Future of Children’s Television Isn’t Television,” *Wired*, July 18, 2023, <https://www.wired.com/story/future-of-childrens-television-youtube-roblox/>.
- ^{xxiv} Ryan Tuchow, “Paramount has laid off the entire Noggin team,” *Kidscreen*, February 15, 2024, <https://kidscreen.com/2024/02/15/paramount-has-laid-off-the-entire-noggin-team/>.
- ^{xxv} Ryan Tuchow, “Paramount+ drops 10 well-known kids titles from its offering,” *Kidscreen*, April 1, 2024, <https://kidscreen.com/2024/04/01/paramount-drops-10-well-known-kids-titles-from-its-offering/>.
- ^{xxvi} CRTC, “Let’s Talk TV: Quantitative Research Report,” April 24, 2014, <https://crtc.gc.ca/eng/publications/reports/rp140424.htm>.
- ^{xxvii} Julia Stoll, “Number of TV cord cutter/cord never households in Canada 2012-2020,” *Statista*, November 10, 2022, <https://www.statista.com/statistics/258444/number-of-tv-cord-cutter-households-in-canada/>.
- ^{xxviii} CRTC, Broadcasting Regulatory Policy CRTC 2015-86, March 12, 2015, <https://crtc.gc.ca/eng/archive/2015/2015-86.htm>.
- ^{xxix} CRTC, Broadcasting Regulatory Policy CRTC 2010-167, March 22, 2010, <https://crtc.gc.ca/eng/archive/2010/2010-167.htm>.
- ^{xxx} Canada Media Fund internal data.
- ^{xxxi} Numeris VAM, Share of TotTime (000) Hrs, Mo-Su 2a-2a, 25 Sep 2023 – 31 Dec 2023.

-
- ^{xxxii} Julia Stoll, “Number of TV cord cutter/cord never households in Canada 2012-2020,” *Statista*, November 10, 2022, <https://www.statista.com/statistics/258444/number-of-tv-cord-cutter-households-in-canada/>.
- ^{xxxiii} Netflix: Peter Nowak, “Netflix launches Canadian movie service,” *CBC*, September 22, 2010, <https://www.cbc.ca/news/science/netflix-launches-canadian-movie-service-1.872505>; Amazon Prime: Raju Mudhar, “Amazon Launches Prime Video in Canada,” *Toronto Star*, December 14, 2016, https://www.thestar.com/business/technology/amazon-launches-prime-video-in-canada/article_1d8d6ead-5193-5d11-b8c6-8fc2c0cccec80.html; Disney+: Canadian Press, “Disney Plus streaming service to launch in Canada mid-November,” *CBC*, August 19, 2019, <https://www.cbc.ca/news/business/disney-plus-launch-canada-1.5251906>; Apple TV+: Jeevan Brar, “New on Apple TV+: What’s Streaming in November 2019,” *TV Water Cooler*, November 2019, https://www.thetvwatercooler.com/2019/11/apple-tv-plus-launches-canada/#google_vignette; YouTube: “Infographic: It’s Screen Time,” *MTM Junior*, September 14, 2023.
- ^{xxxiv} CBC News, “Bell Media axes VRAC, the French-language youth TV channel based in Montreal,” *CBC*, August 18, 2023, <https://www.cbc.ca/news/canada/montreal/bell-media-shuts-down-vrak-1.6940439>.
CBC, August 18, 2022, Bell Media axes VRAC, The French-language youth TV channel based in Montreal.
- ^{xxxv} La Presse canadienne, “Le Groupe TVA abandonne la chaîne jeunesse Yoopa pour diffuser QUB radio,” *Radio-Canada*, November 13, 2023, <https://ici.radio-canada.ca/nouvelle/2026311/groupe-tva-chaîne-jeunesse-yoopa-qub-radio>.
- ^{xxxvi} Jamie Lang, “After 25 Years, Canada’s Teletoon Channel Is Ending. It Will Rebrand as Cartoon Network,” *Cartoon Brew*, February 22, 2023, <https://www.cartoonbrew.com/tv/teletoon-cartoon-network-boomerang-corus-entertainment-226200.html#:~:text=Corus%20Entertainment%20in%20Canada%20announced%20yesterday%20that%20it,and%20the%20current%20Cartoon%20Network%20rebranded%20as%20Boomerang>.
- ^{xxxvii} Andy Fry, “Commissioning Crunch: Producers Facing Greenlight Dead Zone,” *Playback*, June 4, 2024, <https://playbackonline.ca/2024/06/04/commission-crunch-producers-facing-greenlight-dead-zone/>.
- ^{xxxviii} Canada Media Fund, “Performance Envelope Manual, 2020-2021”; “Performance Envelope Manual, 2021-2022”; Performance Envelope Manual, 2022-2023,” <https://cmf-fmc.ca/document/performance-envelope-manual-2022-2023/>; “Performance Envelope Manual, 2023-2024,” <https://cmf-fmc.ca/document/performance-envelope-manual-2023-2024/>; “Broadcaster Envelope Manual, 2024-2025,” <https://cmf-fmc.ca/document/broadcaster-envelope-manual/>.
- ^{xxxix} Canada Media Fund, “Canada Media Fund Introduces Flexibility Measures in Response to Pandemic,” May 13, 2020, <https://cmf-fmc.ca/news/canada-media-fund-introduces-flexibility-measures-in-response-to-pandemic/>.
- ^{xl} Targets in \$ and Results in % and \$: Canada Media Fund internal data
- ^{xli} Canada Media Fund internal data
- ^{xlii} CPAC, “Prime Time 2024: In Conversation with Minister Pascale St-Onge,” February 1, 2024, <https://www.cpac.ca/public-record/episode/prime-time-2024-in-conversation-with-minister-pascale-st-onge?id=eac58489-f526-4f7d-ba1d-490d33312b3a>.
- ^{xliii} Andy Fry, “Commissioning Crunch: Producers Facing Greenlight Dead Zone,” *Playback*, June 4, 2024, <https://playbackonline.ca/2024/06/04/commission-crunch-producers-facing-greenlight-dead-zone/>.
- ^{xliv} Canada Media Fund internal data
- ^{xlv} Chris Lindahl, “The Future of Documentary Filmmaking Is Bright, but It Remains a High-Risk Endeavor,” *IndieWire*, December 11, 2023, <https://www.indiewire.com/features/general/the-future-of-documentary-filmmaking-1234673206/>.
- ^{xlvi} Mia Galluppo and Katie Kilkenny, “Inside the Documentary Cash Grab,” *The Hollywood Reporter*, September 16, 2022, <https://www.hollywoodreporter.com/movies/movie-features/documentary-streaming-age-filmmaker-debate-ethics-payments-1235221541/>.
- ^{xlvii} Verified Market Reports, “Global Documentary Film and TV Show Market By Type (English, Chinese), By Application (Man, Woman), By Geographic Scope And Forecast,” March 2024, <https://www.verifiedmarketreports.com/product/documentary-film-and-tv-show-market/>.
- ^{xlviii} Anthony D’Alessandro, “Participant Closing Doors After Two Decades; Studio Was Behind Oscar Best Picture Winners ‘Green Book’ & ‘Spotlight,’” *Deadline*, April 16, 2024, <https://deadline.com/2024/04/participant-shutting-down-1235887260/>.
- ^{xlix} Etan Vlessing, “Documentaries seek distribution,” *The Hollywood Reporter*, September 2, 2008, <https://www.hollywoodreporter.com/business/business-news/documentaries-seek-distribution-118444/>.
- ^l Paul Bond, “Documentaries Follow the Money,” *The Hollywood Reporter*, January 3, 2012, <https://www.hollywoodreporter.com/news/general-news/documentaries-follow-money-277730/>.
- ^{li} Paul Bond, “Documentaries Follow the Money,” *The Hollywood Reporter*, January 3, 2012, <https://www.hollywoodreporter.com/news/general-news/documentaries-follow-money-277730/>.
- ^{lii} Documentary Organization of Canada, “Getting Real 7,” September 2024, docorg.ca/wp-content/uploads/2023/11/Getting_Real_7_2023-Final.pdf.
- ^{liii} Julia Stoll, “Most viewed video streaming genres in Canada 2023,” *Statista*, June 18, 2024, <https://www.statista.com/statistics/1303266/vod-genres-canada/>.
- ^{liiv} Documentary Organization of Canada, “Getting Real 7,” September 2024, docorg.ca/wp-content/uploads/2023/11/Getting_Real_7_2023-Final.pdf.
- ^{lv} Etan Vlessing, “Broadcasters are chasing docu-series over feature documentaries, says Canadian report,” *The Hollywood Reporter*, September 12, 2023, <https://www.hollywoodreporter.com/movies/movie-news/canadian-broadcasters-docu-series-over-feature-documentaries-get-real-report-123585503/>.

-
- ^{lvi} Documentary Organization of Canada, “Getting Real 7,” September 2024, docorg.ca/wp-content/uploads/2023/11/Getting_Real_7_2023-Final.pdf.
- ^{lvii} Jackson Weaver, “Canada’s biggest documentary festival says it’s dying. Documentarians worry they’re next,” *CBC*, May 2, 2024, <https://www.cbc.ca/news/entertainment/hot-docs-documentary-industry-1.7191083>.
- ^{lviii} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3–8, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{lix} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3–18, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{lx} Documentary Organization of Canada, “Getting Real 7,” September 2024, docorg.ca/wp-content/uploads/2023/11/Getting_Real_7_2023-Final.pdf.
- ^{lxi} Canada Media Fund, “Performance Envelope Manual, 2020-2021”; “Performance Envelope Manual, 2021-2022”; Performance Envelope Manual, 2022-2023,” <https://cmf-fmc.ca/document/performance-envelope-manual-2022-2023/>; “Performance Envelope Manual, 2023-2024,” <https://cmf-fmc.ca/document/performance-envelope-manual-2023-2024/>; “Broadcaster Envelope Manual, 2024-2025,” <https://cmf-fmc.ca/document/broadcaster-envelope-manual/>.
- ^{lxii} Targets in \$ and Results in % and \$: Canada Media Fund internal data
- ^{lxiii} Marni Weisz, “DOC on Docs: Canada’s National Art Form,” *Now & Next, Canada Media Fund*, June 13, 2024, <https://cmf-fmc.ca/now-next/articles/doc-on-docs-canadas-national-art-form/>.
- ^{lxiv} Canada Media Producers Association, “Profile 2023: An Economic Report on the Screen-Based Media Production Industry in Canada,” Exhibit 3–9, May 15, 2024, <https://cmpa.ca/wp-content/uploads/2024/05/Profile-2023-English.pdf>.
- ^{lxv} Canada Media Fund internal data
- ^{lxvi} Maria De Rosa and Marilyn Burgess, “Defining Canadian Content: Approaches Taken in Other Jurisdictions and Lessons Learned for Canada,” Motion Picture Association - Canada, February 23, 2022, <https://www.mpa-canada.org/wp-content/uploads/2023/05/MDR-Report-ENG-3.pdf>.
- ^{lxvii} Patrician Hidalgo, “BBC children’s education: Why do we care?,” *C21Media*, August 20, 2024, <https://www.thechildrensmediafoundation.org/the-childrens-media-yearbook-2024>.
- ^{lxviii} Patrician Hidalgo, “BBC children’s education: Why do we care?,” *C21Media*, August 20, 2024, <https://www.c21media.net/perspective/bbc-childrens-education-why-do-we-care/>.