THE PROFILE OF RECIPIENTS OF COVID-19 CMF EMERGENCY RELIEF FUNDS – SUMMARY REPORT

COMPANIES OWNED BY BLACK PEOPLE AND PEOPLE OF COLOUR

April, 2020

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Background and objectives

- The events of the past two years have increased awareness of the need to address systemic and structural barriers of racism. Many organizations have taken steps towards making change including the implementation of policies and the collection of information and data to provide a base understanding of underrepresented communities and the issues they face in order to develop possible ways to address them.
- In early-mid 2020, the Government of Canada designated funds to support cultural, heritage and sport organizations through the economic crisis brought about by the COVID-19 pandemic; $13.3M of this fund was devoted to underrepresented groups, including media companies owned and led by Black people and people of colour (BPOC). The program, called the COVID-19 CMF Emergency Relief Funds – Allocation for Companies Owned by Black People & People of Colour (“BPOC Allocation”), was delivered through the Canada Media Fund (CMF).
- Applications were received and reached maximum allocation within 24 hours of the program launch on November 19th, 2020. Main eligibility criteria: a) company is majority owned (51% or more) by one ore more Canadians who self-identified as a Black Person or Person of Colour; b) which owns the rights to at least one project funded by a Canadian third party since January 1, 2015 destined for the TV or digital markets; and c) it can demonstrate a projected negative impact of at least 25% of its activities due to COVID-19.
- The CMF, as a part of the BPOC Allocation Funding, conducted the first-of-its-kind collection of in-depth data and information among its funding recipients. The CMF commissioned Ipsos to collect data from funding recipients through an online Questionnaire. The goal of the Questionnaire was to collect individual and corporate level information to better understand the profile and current situation of companies owned by Black People and other people of colour in Canada’s screen industries.
- Completing the Questionnaire was a requirement under the agreement signed by the allocation beneficiaries.
- A key next step in this endeavor is to put this data and information into context by finding and comparing data available about media producers and creators in the industry generally, either from other industry associations/organizations or through primary data collection.

Methodology

- A total of 168 companies who received CMF funding were invited by Ipsos to complete the online Questionnaire
- Field window of the survey was between December 21, 2020 and February 16, 2021
- 154* companies completed, a 92% response rate
- On average, the Questionnaire was 30 minutes in length
- Conducted in English and French: 77% of the sample is comprised of English speakers, and 23% of French speakers
- The results from this survey are not representative of all Canadian media producers and creators but of those who applied to the BPOC Allocation program. Note that information about the total number of Canadian media producers and creators in not available/unknown.
- All data was provided to the CMF in aggregate form only to maintain the confidentiality of recipients who completed the Questionnaire.

*NOTES:

An additional two companies completed the Questionnaire after the closing date of the survey, a total of n=156 (an overall 93% response rate). The data for these two late completes are not included in this reporting.

How to read this report

- This summary report is divided into four sections:
  - **Section 1. Profile of Shareholders.** This section includes a demographic profile of partners/shareholders who identify as Black or people of colour within the company and includes self-identification regarding race, ethnicity, gender, sexual orientation, and other information. The unit of analysis is recipient shareholders.
  - **Section 2. Corporate Profile Information.** This section includes information about the company's situation currently and prior to the COVID-19 pandemic, including its location, national or international reach, people working with the company and the type of projects developed and produced. The unit of analysis is companies.
  - **Section 3. Companies' Operating and Production Budgets.** This section includes information about the company's capacity to sustain its productions, access funding and remain stable and successful in the future. The unit of analysis is companies.
  - **Section 4. Efforts towards Representation and Structural Barriers.** This section highlights companies' efforts to reflect diverse content as well as employees/staff behind the camera, the types of barrier they face in the industry and suggestions for change.
- Where figures do not sum to 100, this is due to the effects of rounding, or the question had multiple response options.
- We ran statistical testing to compare subgroup differences [green highlighted boxes indicate that subgroup/s are statistically higher than other subgroup/s]. Subgroups with significant differences are also indicated by letters in tables. A letter indicates that a result is significantly higher for this subgroup when compared with the other subgroups. The use of statistical testing is a guide to look for differences. There may be meaningful differences even if it is not statistically significant.
- Province, instead of preferred language, is mostly used for analysis, as the majority of French speakers (94%) reside in Quebec.
- When looking at results by ethnic/racial group where the unit of analysis is *individual respondents,* note that the question about ethnic/racial identity was multi-select (e.g. recipient selected "Mixed Race" and "Black" and "Latin American." The base sizes of all groups, therefore, sum up to more than the total number of respondents.
- Following this, on a separate note, when looking at results by ethnic/racial group where the unit of analysis is *companies*, the number of respondents per subgroup includes these multi-select responses and multiple shareholder responses (note that most of these companies have shareholders with the same racial/ethnic background).

Definitions and acronyms

- BIPOC (Black, Indigenous and people of colour)
- BPOC (Black People and people of colour)
- Respondents were asked to identify using the following group definitions (multi-select):
  - Black (or Afro-Canadian, African Canadian)
  - Latin American (or Latino, Latina, Latinx)
  - Middle Eastern or North African (including Arab, Iranian, Turk or Turquish and other communities in these regions)
  - South Asian (including Afghanistan, Pakistan, India, Nepal, Bangladesh, Sri Lanka, Bhutan and Maldives)
  - Southeast Asian (including Brunei, Cambodia, East Timor, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam, Palau, Micronesia)
  - East Asian (including China [and Taiwan, Hong Kong & Macao], South and North Korea, Japan, Mongolia)
  - Indigenous (including First Nations, Metis or Inuk [Inuit])
  - Mixed race (a combination of any of the above categories or any of the above categories with White or European descendant)

Team

- Project Leads **Grace Tong (IPSOS)** & **Diego Briceño (CMF)**
- Research Advisors **Pierre Tanguay** & **Jessica Yang (CMF)**

EXECUTIVE SUMMARY

Executive summary

Profile of individual shareholder recipients

- The majority of recipient shareholders (82%) identify as Black or people of colour and represent a cross section of ethnic/cultural/racial backgrounds. The largest proportion of English speakers includes a mix of those who identify as Black, South Asian and East Asian. French-speakers include more recipients who are Black and Middle Eastern/North African.

- The group is split by gender, and it skews older – only a quarter are under 40 years old. This may be a function of recipients being more established in the industry as owners/shareholders. This data may indicate there is an underrepresentation of younger talent of diverse backgrounds in the industry, and it presents an opportunity to recruit, encourage and support new and younger producers/creators.

- Many recipient shareholders are first-generation Canadian (64%). Differences by racial/ethnic groups reflects Canadian immigration and settlement patterns, e.g. those identifying as Black (49%) and mixed race are more likely to be second+ generation Canadian, while the majority of recipients who are Middle Eastern are first generation.

- To understand how producers of colour are faring financially on a personal level, the Questionnaire also asked about their personal income. A significant proportion of individual shareholder recipients (38%) report earning less than $30K in annual personal income before taxes in 2019. The average and median annual personal income among recipients was $47,745 and $37,500, respectively. Putting this into perspective, these amounts are slightly lower than the average Canadian salary of $49K and median of $37.8K (StatsCan. reference year 2019, 16 and older), and significantly lower than one would expect if one were living in a metropolitan city such as Toronto and Vancouver. Note that 16% did not provide a response to this question.

Executive summary

A note about terminology to address underrepresented groups

- When asked which *racialized term* they wished to use to reflect people like them (open-ended), three quarters of recipient shareholders mentioned their specific ethnic/cultural/racial background, including hyphenated identities such as African-Canadian, Chinese-Canadian, Indo-Canadian, etc. Very few (11%) mentioned a preference for a general racialized term such as Person of Colour, BPOC, Mixed Race, Visible Minority, etc. A minority of respondents (13%) said they prefer no terminology to be used. It is important to consider the diversity of experiences (when they came to Canada, if born in Canada, etc.) and changes over time in how people can perceive their identity. Regardless, recipients overall tend to prefer their specific racial/ethnic or cultural background being used over a generalized term to reflect their communities.

- Following this, recipients were asked to select the term(s) they felt most comfortable with but there is no clear consensus on which terminology is more appropriate. That said, shareholder recipients are most comfortable with being identified as a *member of a diverse ethno-cultural group/community* (higher in Quebec where the term implies "racialized group"); after this, recipients are equally likely to accept *BIPOC (Black, Indigenous and People of Colour)*, or *Person of Colour* (higher among English speakers).

- There are differences by ethnic/racial group noted: those who identify as Black select *BIPOC* (50%) and *BPOC* (48%) as their preference, followed by *Person of Colour* and *Racialized Person*. Those identifying as Middle Eastern/N. African are most likely to select *Member of a diverse ethno-cultural group or community* (72%) and *Member of an underrepresented community in Canada* (45%). And those identifying as Southeast Asian and East Asian show a preference for *Member of a diverse ethno-cultural group or community, Visible Minority and Person of Colour*.

- Age also makes a difference with younger recipients showing greater preference for *BIPOC* and *Person of Colour* than those older.

Executive summary

Profile of companies

- Two-thirds of recipient companies have one owner, indicating that single ownership companies may be at higher risk of financial instability.
- As one might expect of companies in need of funding, many are newly incorporated (half within the past five years/ seven in 10 within the past 10 years). More than other groups, six in 10 companies owned by Black recipients were recently incorporated in the past five years (half of which were in 2019/2020).
- The majority of companies are headquartered in Ontario (51%) and Quebec (32%), with few located in British Columbia (11%), in other western provinces (5%) and the east coast (1%).
- The majority of companies produce live action projects, but some produce animation, interactive digital media content, and/or provide production services to other companies. Companies that produce linear content are most likely to focus on scripted drama and documentary but some also create children/youth programming, variety and performing arts, and commercial/industrial content/other, the latter of which is not funded by the CMF. Companies are also most likely to focus on feature films (71%), a format that is also not typically funded by the CMF but may be used by producers as an entryway into the industry, and that may be potentially funded by the CMF.
- Companies that produce interactive digital media content focus mostly on digital platforms, extended reality and multi-platform products. Companies that produce games are less represented among recipients, perhaps due to less need for support funding at this time.
- Content is produced primarily in English but also in French in other languages: almost 9 in 10 companies produce English-language content; one-third produce French-language content; and 4 in 10 companies produce content in languages that cover a broad spectrum of cultures.

Executive summary

Company's operating and production budgets

- 4 in 10 companies have relatively small operating budgets of <$50K. The median is around $75K but the average across companies is $169K. Operating budgets are lowest for those in BC, and they are highest for those who identify as Latin American (and who are more likely to work in the area of interactive digital media content (games, apps, websites, etc.).

- Single ownership companies have significantly lower operating budgets with a median of $30K and an average of around $70K, making them more financially vulnerable. Companies with two to three employees have more than double the operating budget with a median of $75K and a mean of $154K, and this increases with the size of the company (more employees).

- Interestingly, while there are just as many women as men recipients, the mean/median annual operating budget is lower for women compared to men (average of $138,866 for women vs. $194,142 for men). This overall smaller operating budget for women may put their companies at higher risk of instability, but it is important to recognize that women are slightly more likely to be single owners with no employees (41% of women vs. 33% of men).

- The Questionnaire also asked about the lowest and highest production budgets for current and completed projects. There is a wide range of budgets from a *median low* of $30K (regardless of size of company) to a *median high* of $300K (larger size companies of 10+ employees have a median high of $525.5K). One-third of companies report that their lowest production budget was less than $10K, while only 11% report a high of 2 million. The story is somewhat positive as six in 10 say production budget ranges have increased over time. However, longer-established companies are more likely to say that budgets have stayed the same or decreased than those established in the past five years.

- The lowest development/prototyping budget for a large proportion of projects (40%) is <$5K. The median of the lowest budget range is $7.5K, while the median of the highest budget range is $30K. Comments from recipients indicate that more development funding is needed to support BPOC producers and creators.

- In terms of funding sources, companies tend to rely on a number of funding sources – one-third of companies say they rely on 6 or more sources. They also turn to a wide range of funding sources: three-quarters are self-funded, followed by the CMF as the second largest fund (57%). Other key sources include Telefilm, tax credits provided by both provincial and federal level governments, and provincial funding agencies, among others.

Executive summary

Efforts towards representation, structural barriers and suggestions for the CMF

- Companies that received the BPOC Allocation are making a conscious effort towards creating content to reflect the diversity of Canadians and to put their stories on screen. Over nine in 10 have policies in place/make a conscious effort to create content about racialized communities; seven in 10 of these report a majority/ all their current projects (80-100%) are about BPOC.

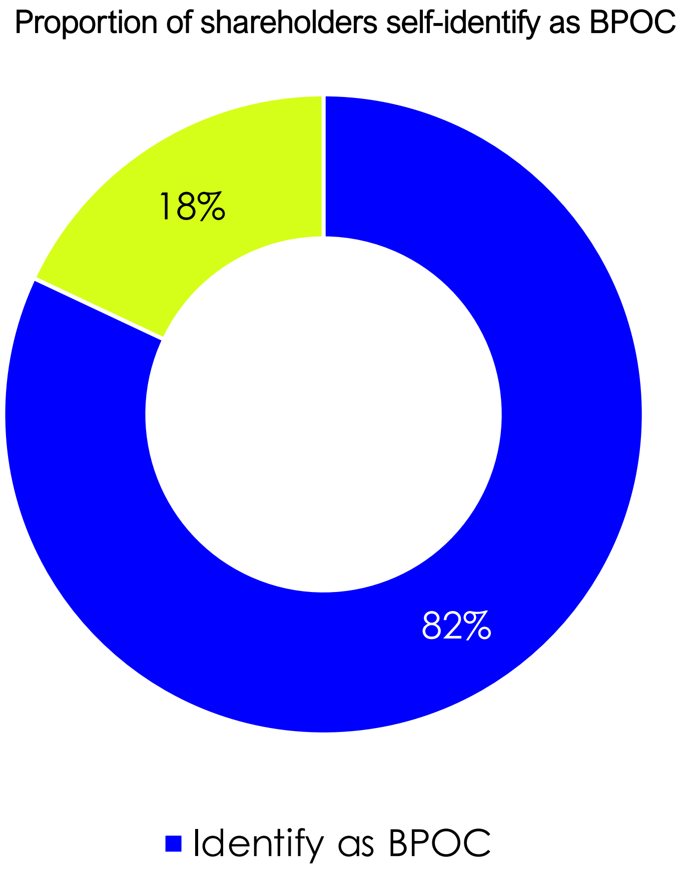
- Efforts are also being made behind the screen to increase representation in the industry. A majority of companies (81%) report that half or more of their employees identify as BPOC, and 64% report the same for contractors (this proportion decreases among larger sized companies with 10 or more employees).

- Producers belonging to underrepresented groups face a range of barriers to their company's stability and success. The biggest barriers are limited access to broadcasters, followed by systemic racism and bias, a lack of representation at the decision level, inability to meet eligibility requirements (also related to access to broadcasters), unfair competition with more established companies and a lack of information on the business case for producing content including audience measurement.

- To address these, recipients provided a number of suggestions to the CMF that may help to address the issues they face:
  - Make funding eligibility/criteria requirements easier for BPOC, including expanding the definition of Canadian content, e.g. relaxing language requirements and story-setting stipulations, and revising the development threshold for broadcasters to access CMF funds
  - More funding, and specifically more funding for development
  - Increase representation among (and therefore access to) "gatekeepers" and decision-makers
  - Move past the same players and work with new companies; support those with less experience
  - Setting quota targets/point system
  - Apply a similar model developed for women
  - More access to (personalized) business support information/advice; mentorship
  - Support the creation of a directory, hub or forum for networking and opportunities

SECTION 1.
PROFILE OF SHAREHOLDERS

82% of all shareholder recipients self-identify as BPOC

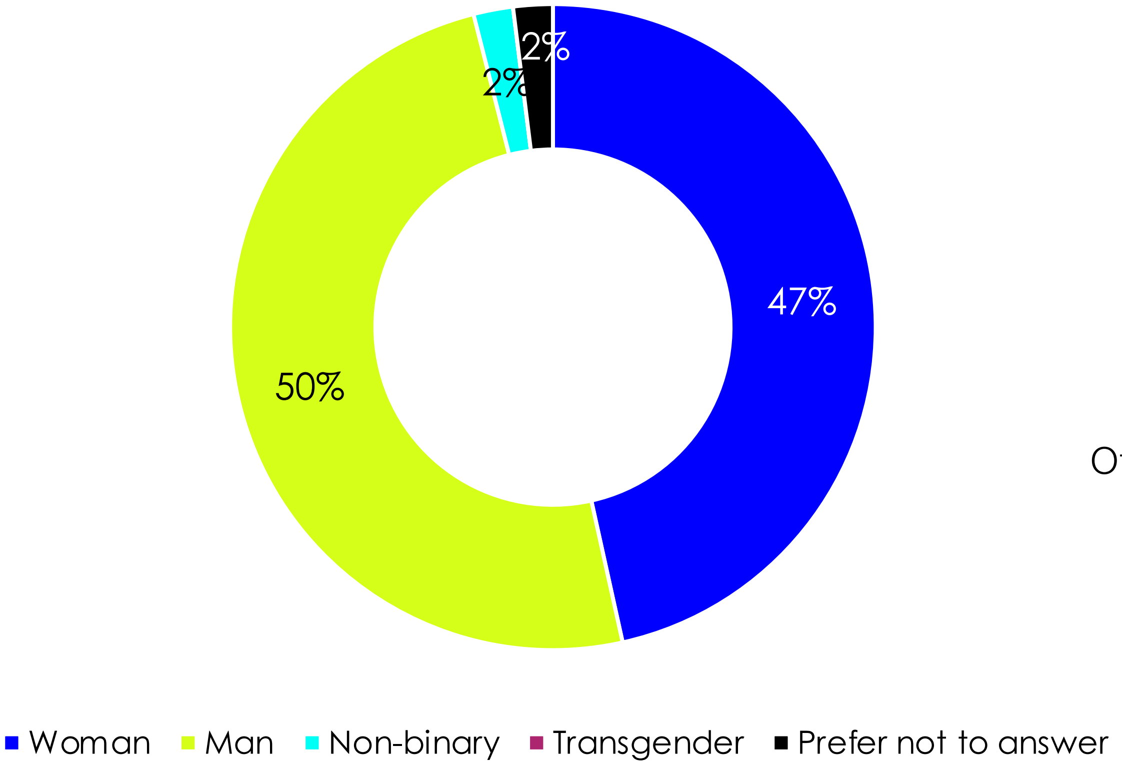


- A total of 244 individual recipient shareholders belong to the 154 companies that received funding and completed the Questionnaire
- Of these individual recipient shareholders, 199* (82%) self-identify as BPOC.
- 99% of recipient shareholders reside in Canada
  - BC – 13%
  - West (AB, MB, SK) – 9%
  - ON – 48%
  - QC – 30%
  - East Coast – 1%
- NOTE: 193 of these individuals completed the Questionnaire (a maximum of three [largest] shareholders from each company were asked to complete the Questionnaire)

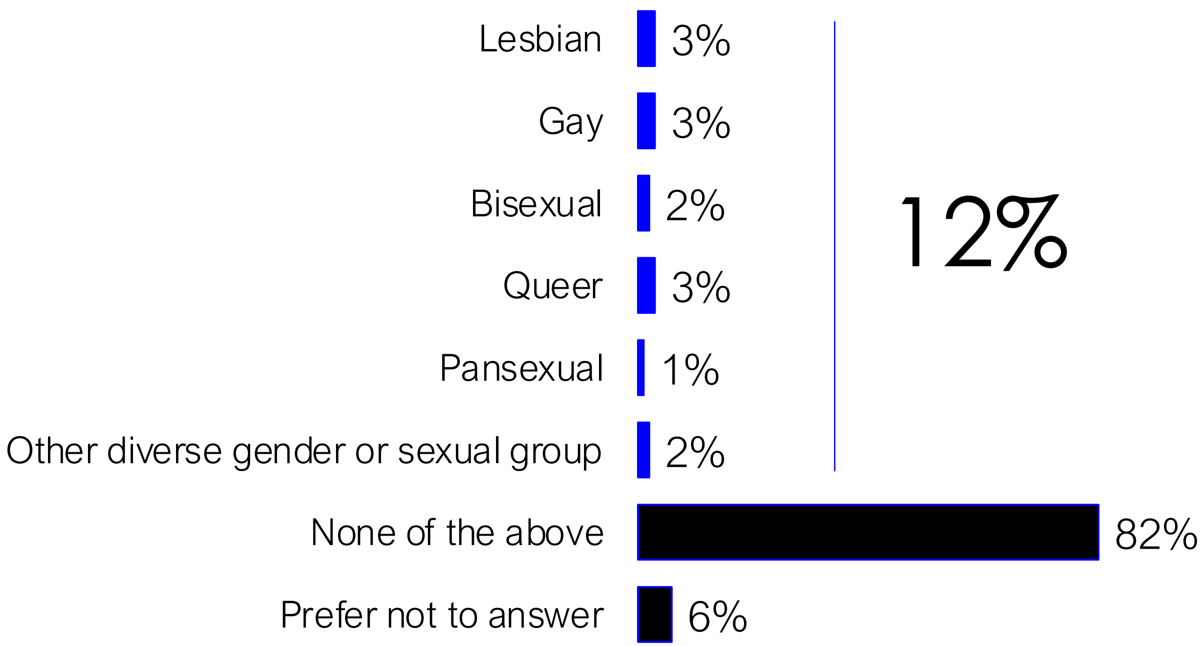
Q1. How many partners or shareholders does your company have? Please enter a number. All companies n=154
Q2. How many partners or shareholders self-identify as Black or as a Person of Colour within your company? Please select a response. All companies n=154

A relatively equal number of men and women received the BPOC Allocation funding (2% identify as non-binary). 12% identify their sexual orientation as non-heterosexual

Gender identity

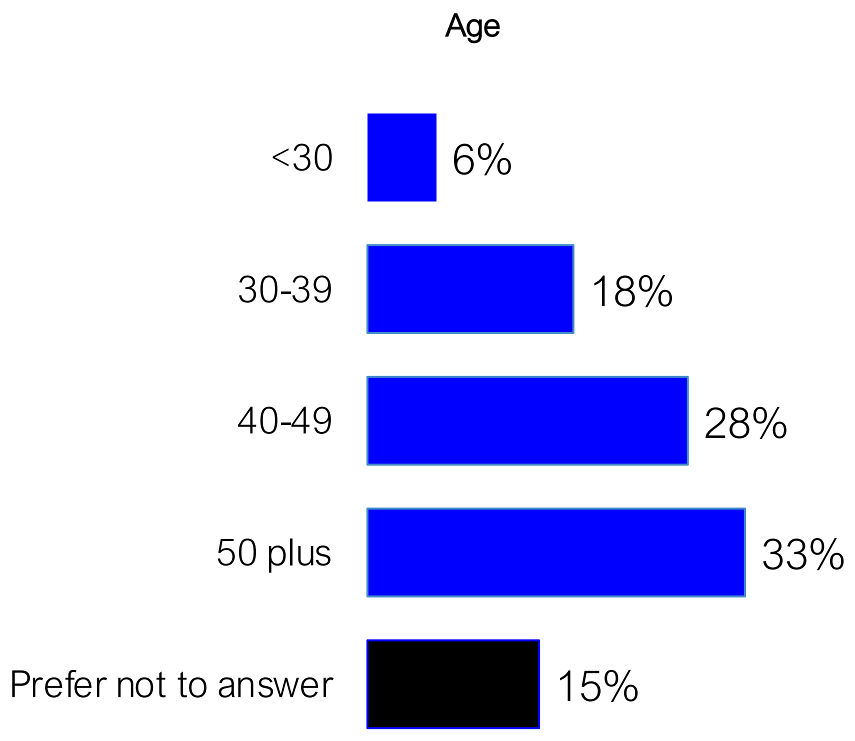


Sexual identity



Q8/8A. How do you prefer to self-identify? All shareholders n=193
Q9/9A. Do you self-identify as belonging to any of these groups? SINGLE SELECT. All shareholders n=193

The profile of shareholder recipients skews older (only a quarter are <40 years); this may be a function of recipients being more established in the industry as owners/shareholders



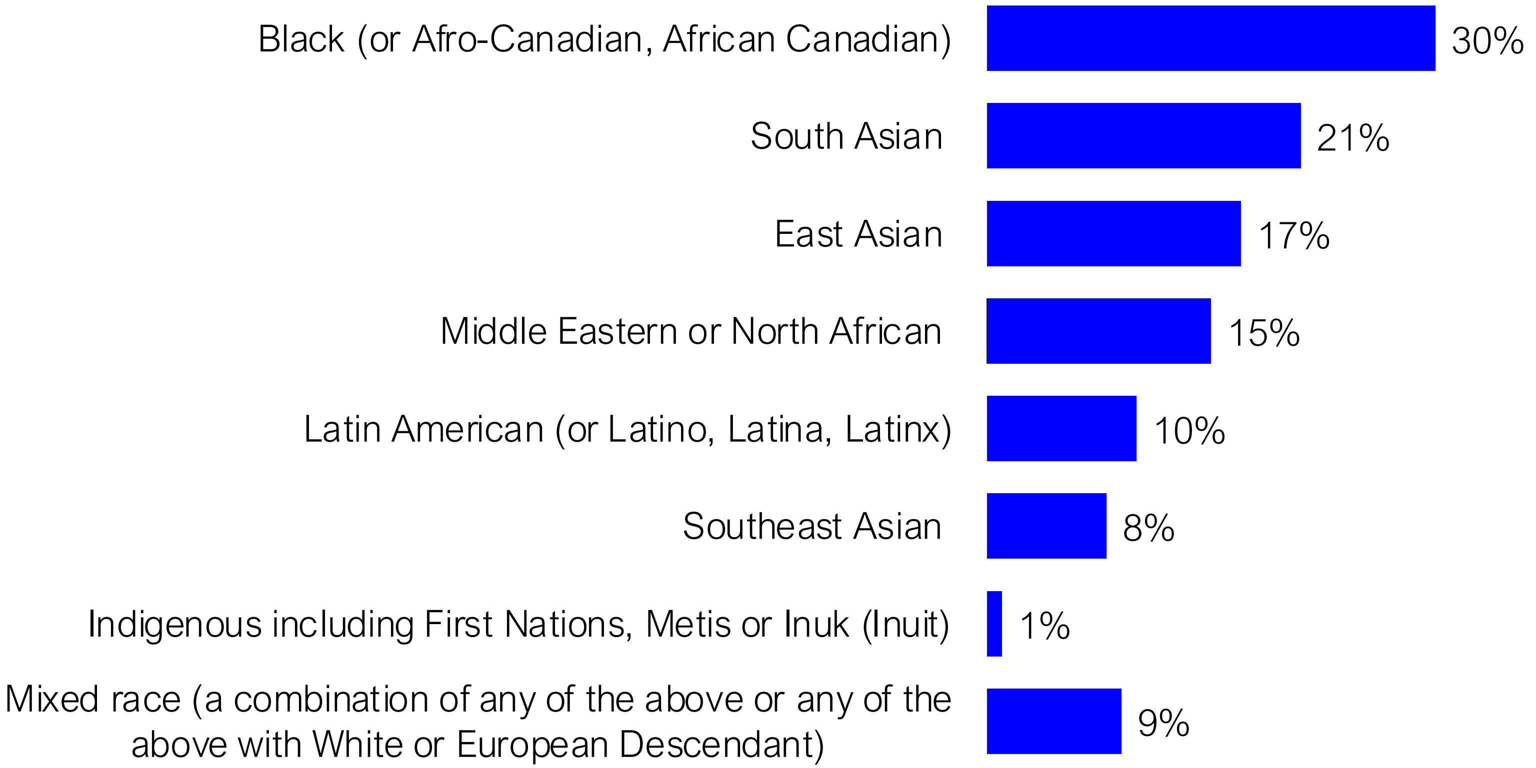
Women	Men
91	96
2%	9%
20%	17%
26%	32%
33%	34%
19%	7%

Green indicates a statistically significant difference

For age by ethnic/racial group click here

  Q12/12A. In what year were you born? Please enter a year. All shareholders n=193

The group of recipients reflects a diversity of backgrounds. The largest proportion of English-speakers includes a mix of those who identify as Black, South Asian and East Asian. French-speakers include more who are Black and Middle Eastern/North African.



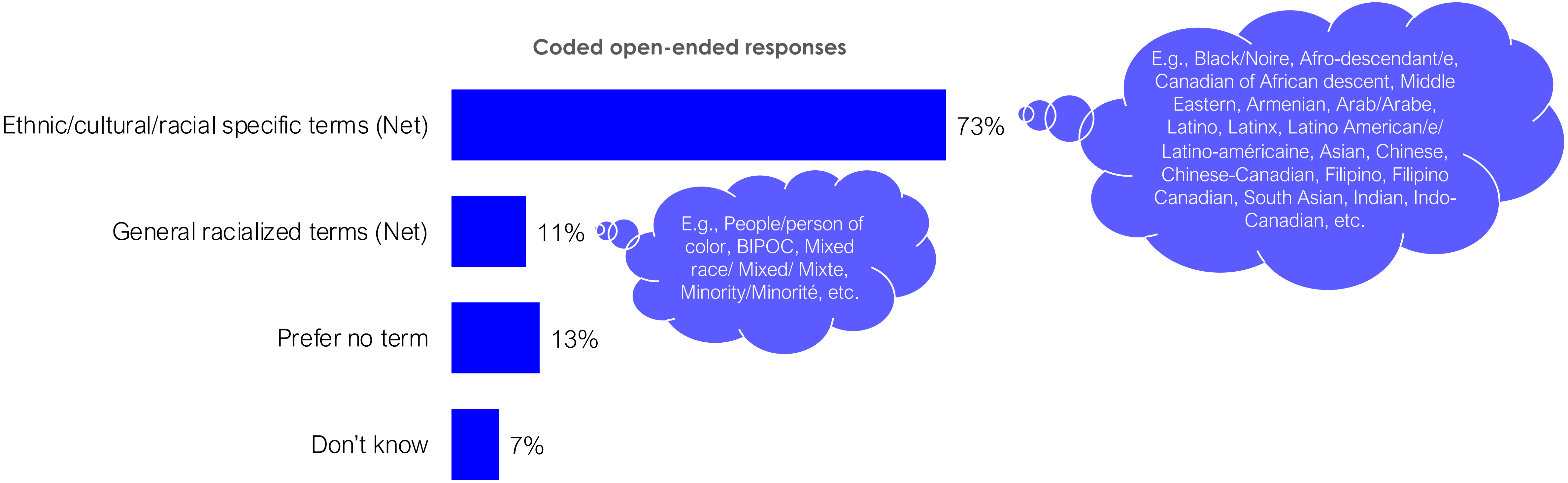
	English 153	French 40
Black (or Afro-Canadian, African Canadian)	**27%**	**40%**
South Asian	**27%**	-
East Asian	**21%**	2%
Middle Eastern or North African	10%	**35%**
Latin American (or Latino, Latina, Latinx)	10%	10%
Southeast Asian	9%	2%
Indigenous including First Nations, Metis or Inuk (Inuit)	1%	2%
Mixed race (a combination of any of the above or any of the above with White or European Descendant)	8%	12%

Green indicates a statistically significant difference
Bold highlights top 2 to 3 by subgroup

Q3/3A. Do you identify as belonging to one or more of the following racial categories (that would best describe identity, ethnicity or regional descendancy)? All shareholders n=193
For full description provided for each category, see notes. MULTI-SELECT RESPONSE

Three quarters of recipient shareholders prefer being identified by their specific ethnic/cultural/racial background (open-ended response)

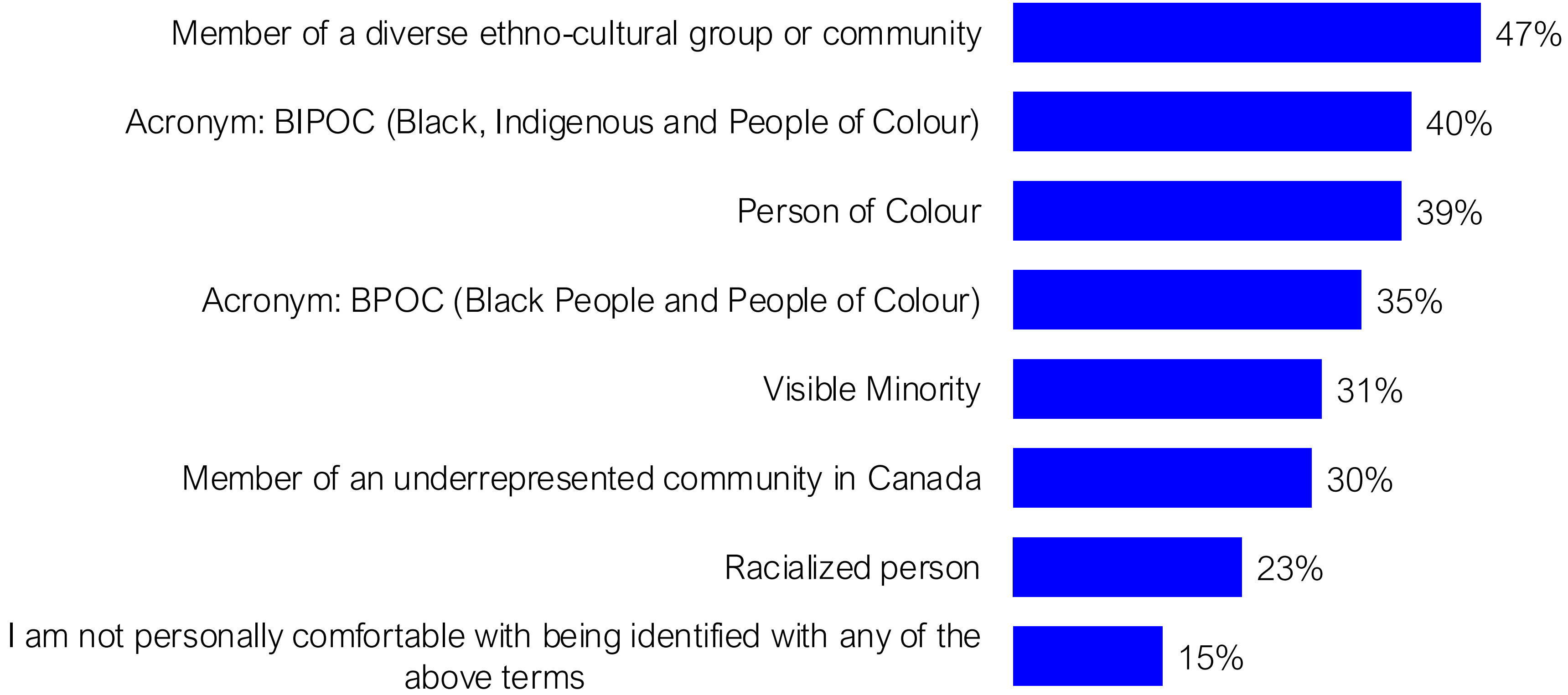
When asked which racialized term they wished to use to refer to their racial, ethnic or cultural background, three-quarters of recipient shareholders (73%) mentioned their specific ethnic/cultural/racial background; some also mentioned hyphenated identities such as African-Canadian, Chinese-Canadian, Indo-Canadian, etc. Very few (11%) mentioned a preference for a general racialized term such as Person of Colour, BPOC, Mixed Race, Visible Minority, etc. A similar proportion (13%) said they prefer no terminology to be used. No significant differences by language.



Q4/4A. Self-identifying by racial, ethnic, or cultural background can be different for different people, even for those coming from the same background. What "racialized" term, if any, do you prefer to use to refer to your racial, ethnic or cultural background? All shareholders n=193. MULTI-MENTION OPEN-ENDED QUESTION

There is no clear consensus on which terminology is more appropriate to address underrepresented communities

Shareholder recipients are most comfortable, however, with being identified as a *member of a diverse ethno-cultural group/community*; after this, they are equally likely to be fine with *BIPOC (Black, Indigenous and People of Colour)*, or with *Person of Colour*. The least popular term is *racialized person* (exception is among Black recipients – see slide). While both English and French-speaking recipients choose *Member of a diverse ethno-cultural group or community*, English speakers also prefer BIPOC and Person of Colour (more so than French speakers).



	English 153	French 40
Member of a diverse ethno-cultural group or community	**44%**	**58%**
Acronym: BIPOC (Black, Indigenous and People of Colour)	**45%**	20%
Person of Colour	**45%**	15%
Acronym: BPOC (Black People and People of Colour)	35%	**35%**
Visible Minority	32%	28%
Member of an underrepresented community in Canada	30%	30%
Racialized person	21%	30%
I am not personally comfortable with being identified with any of the above terms	14%	18%

Note: In Quebec, *Membre d'une communauté ou d'un groupe issue de la diversité ethnoculturelle* is a term that implies belonging to a "racialized group."

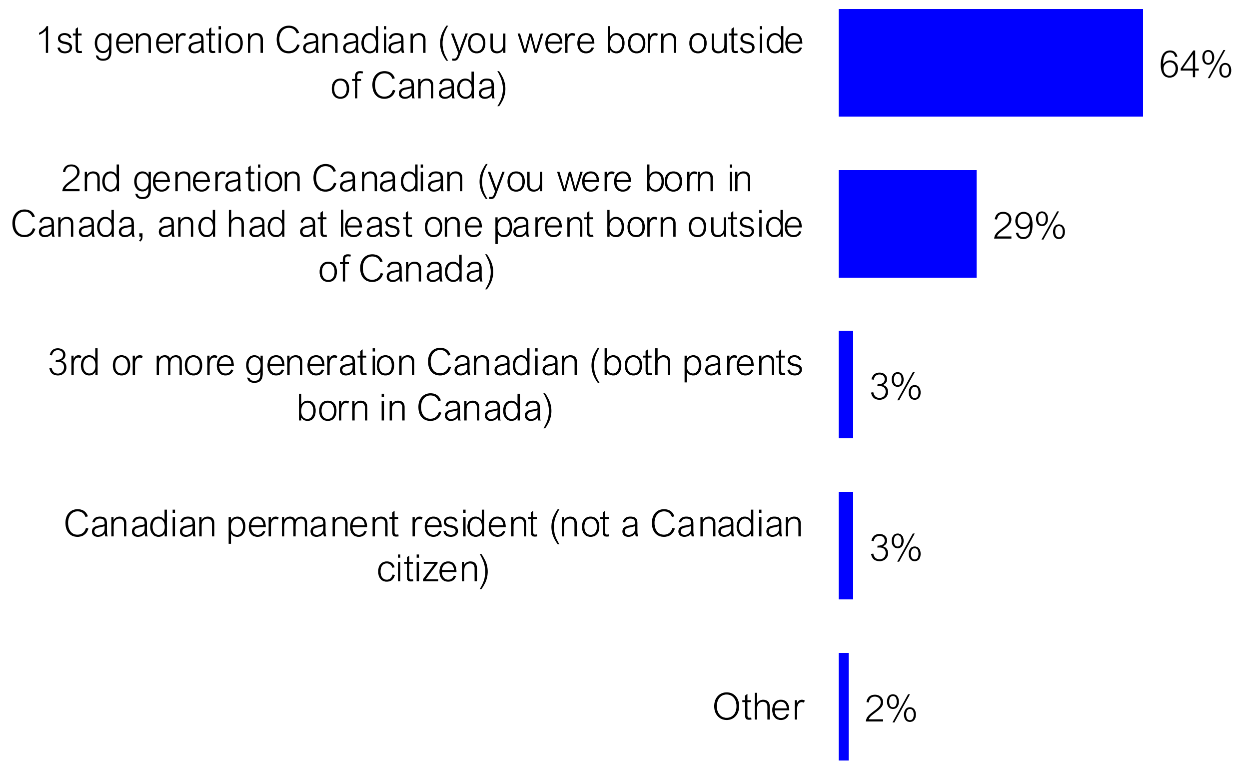
For preferred terminology by ethnic/racial group and age, click here

Q5/5A. The terminology used to address underrepresented communities in Canada changes over time, yet often the communities only have a limited say on how they prefer to be identified. Are you personally comfortable in being identified as any of the following terms? All shareholders n=193. MULTI-SELECT RESPONSE

Green indicates a statistically significant difference
Bold highlights top 2 to 3 by subgroup

A larger proportion of recipients are first generation Canadian

There is no difference by language spoken (not shown in table). However, there is some difference by racial/ethnic group – those identifying as Black and Mixed Race are more likely to be second generation Canadian, while the majority of recipients who are Middle Eastern are first-generation.

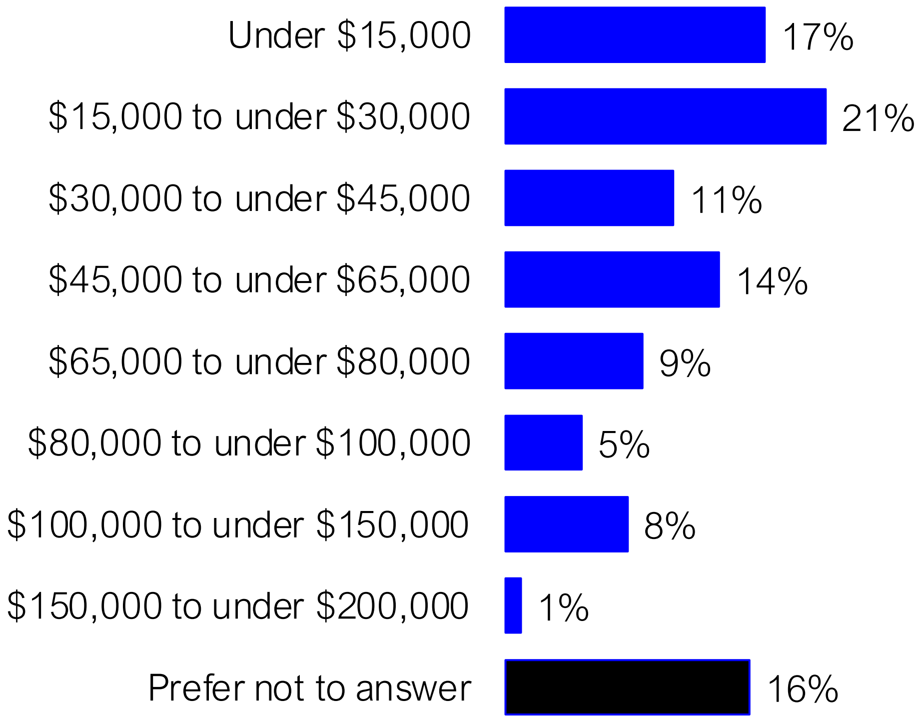


ETHNIC/RACIAL GROUP					
Black	Lat Am	Middle Eastern	South Asian	SE Asian/ E. Asian	Mixed race
A	B	C	D	E	F
58	19	29	41	48	18
48%	74%AF	90%ADEF	63%	69%AF	39%
41%C	26%	10%	24%	25%	61%ABDE
5%	-	-	2%	2%	-
2%	-	-	7%	4%	-
3%	-	-	2%	-	-

Green indicates a statistically significant difference
A letter indicates that a result is significantly higher for this group when compared to the other group(s).

Q6/6A. Which of the following best describes your Canadian status? All shareholders n=193.

A significant proportion of individual shareholder recipients report earning less than $30K in annual personal income before taxes in 2019 (38%)



Earning less than $30K in personal income before taxes	38%
Mean income	$47,745
Median income	$37,500

The average and median annual personal income among recipients was $47,745 and $37,500, respectively. This is slightly lower than the average Canadian salary of $49K and median of $37.8K (2019, 16 and older)*

Q15_15A. What was your total annual personal income before taxes in 2019? All shareholders n=193

*Statistics Canada. *Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas (16 years and older, reference period: 2019, excluding zeros). Accessed on April 5, 2021:* Table 11-10-0239-01 Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas

There are some differences in the reporting of annual income by regional area and racial/ethnic groups: recipients in BC and QC earn less, as do those who identify as Middle Eastern

There is very little difference by gender (not shown in table).

	TOTAL	ON	QC	BC	Rest of Canada
		A	B	C	D
Base:	193	90	60	24	19
Earning <$30K in personal income before taxes	38%	29%	47%	54%A	26%
Mean income	$47,745	$56,133	$40,833	$30,714	$52,813
Median income	$37,500	$55,000	$22,500	$22,500	$55,000

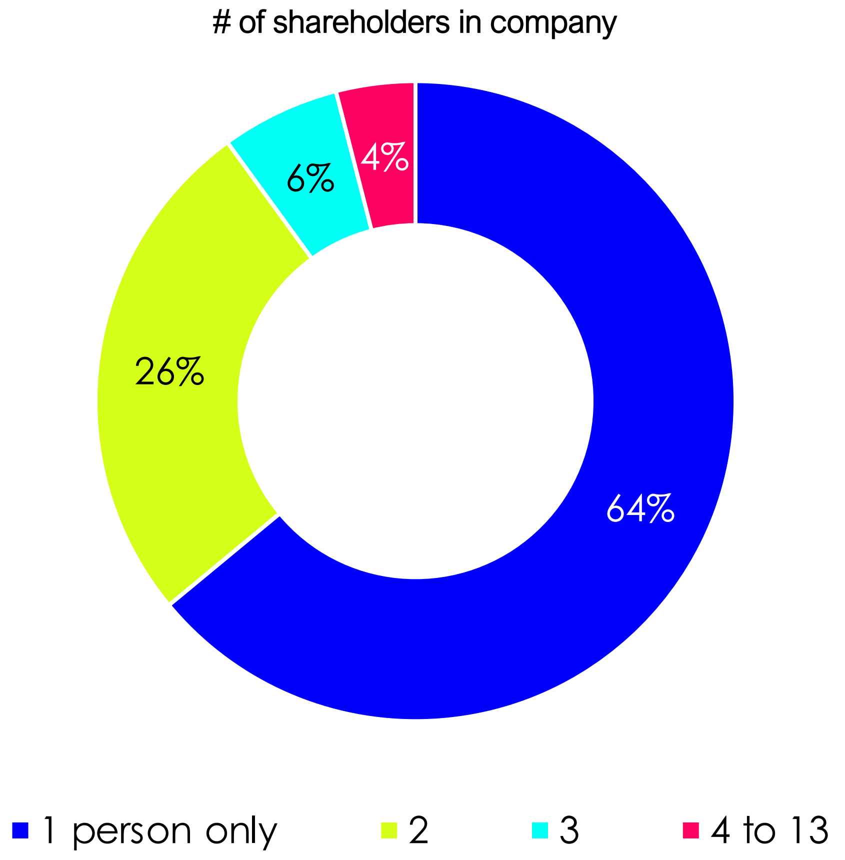
	Black	Lat Am	Middle Eastern	South Asian	SE Asian/ E. Asian	Mixed race
	A	B	C	D	E	F
Base:	58	19	29	41	48	18
Earning <$30K in personal income before taxes	33%	26%	45%F	37%	44%F	23%
Mean income	$51,222	$60,000	$35,416	$45,285	$45,975	$47,166
Median income	$37,500	$37,500	$22,500	$37,500	$22,500	$37,500

Q15_15A. What was your total annual personal income before taxes in 2019? All shareholders n=193

Excluding prefer not to answer from mean and median calculations
A letter indicates that a result is significantly higher for this group when compared to the other group(s).

SECTION 2.
PROFILE OF BPOC COMPANIES

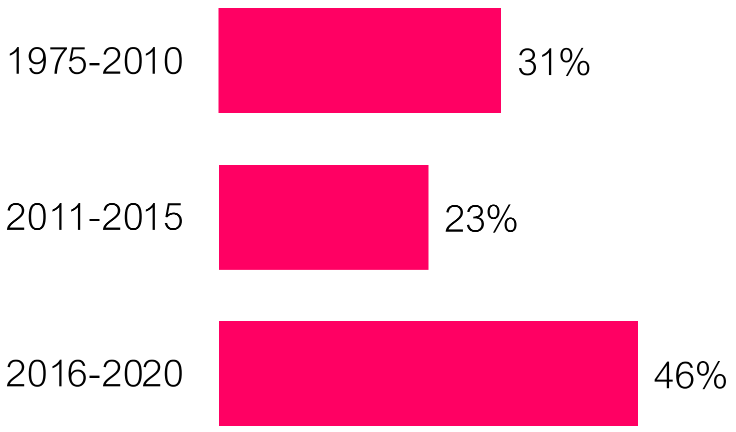
Two-thirds of recipient companies have one owner, indicating that single ownership companies may be more financially vulnerable



Q1. How many partners or shareholders does your company have? Please enter a number. All companies n=154
Q2. How many partners or shareholders self-identify as Black or as a Person of Colour within your company? Please select a response. All companies n=154

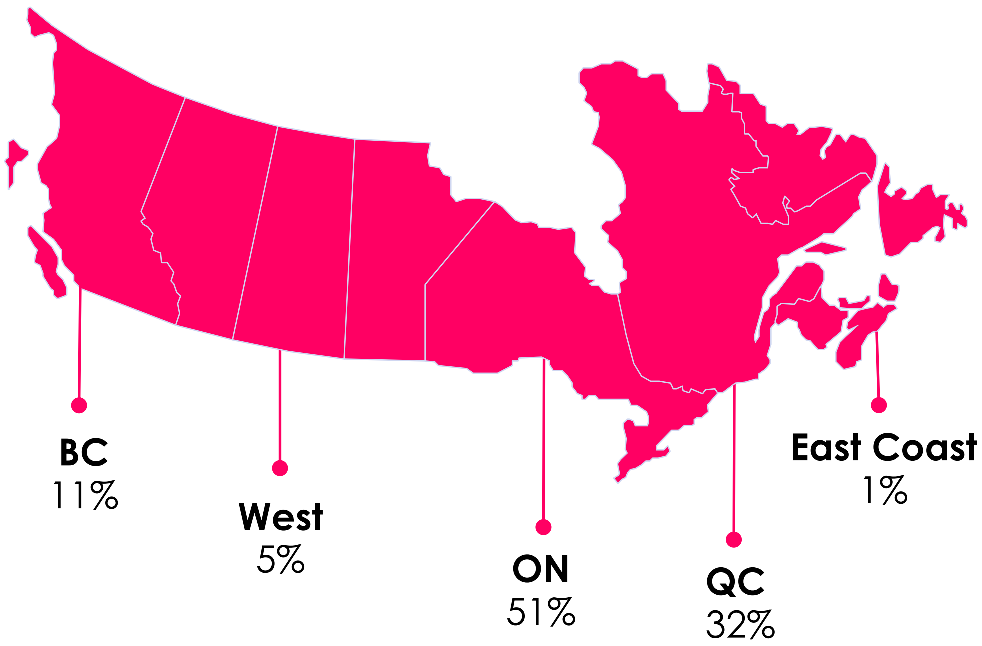
Almost half of companies were newly incorporated within the past five years. Compared to other groups, a larger proportion of Black-owned companies (61%) were recently incorporated during this period (half of these were in 2019/2020)

Year incorporated



	Black	Lat Am	Middle Eastern	South Asian	SE Asian/ E. Asian
	A	B	C	D	E
Base:	44	17	26	30	40
1975-2010	27%	47%	35%	37%	25%
2011-2015	11%	12%	42%ABD	17%	33%
2016-2020	61%E	41%	23%	47%C	43%

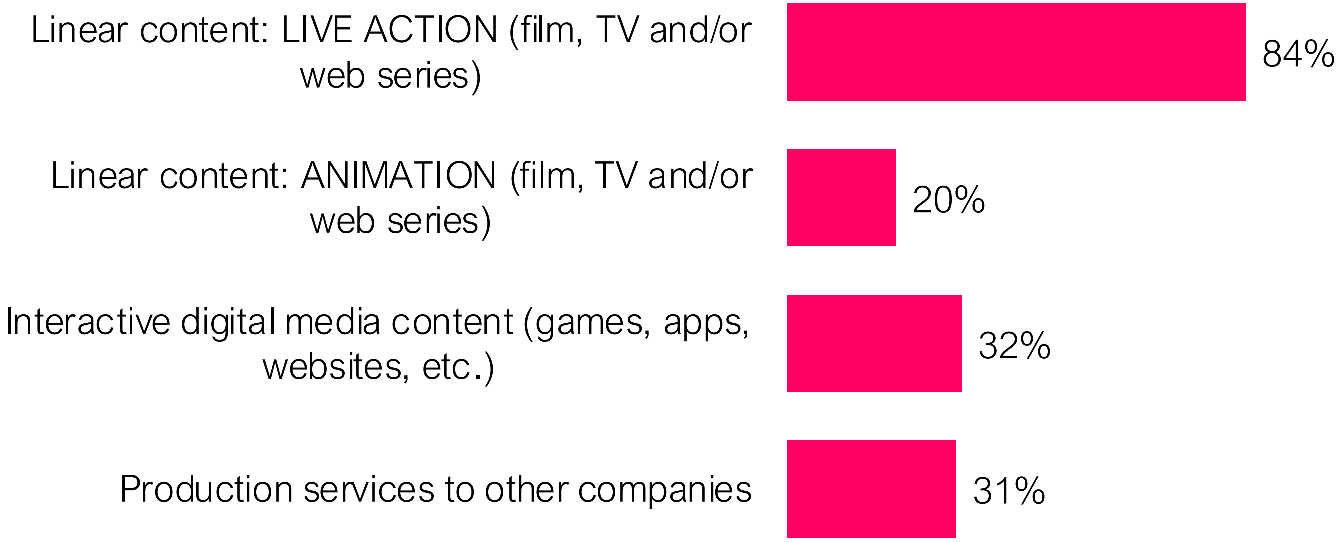
Region of operation



Q16. In what year was your company incorporated? Please enter the year. All companies (n=154)
Q17. In which province or territory is your company's headquarters? All companies (n=154)

Green indicates a statistically significant difference
A letter indicates that a result is significantly higher for this group when compared to the other group(s).
Note that the bases for gender and ethnic/racial groups are all shareholders, not all companies

The majority of companies produce live action projects, but some produce animation, interactive digital media content, and/or provide production services to other companies



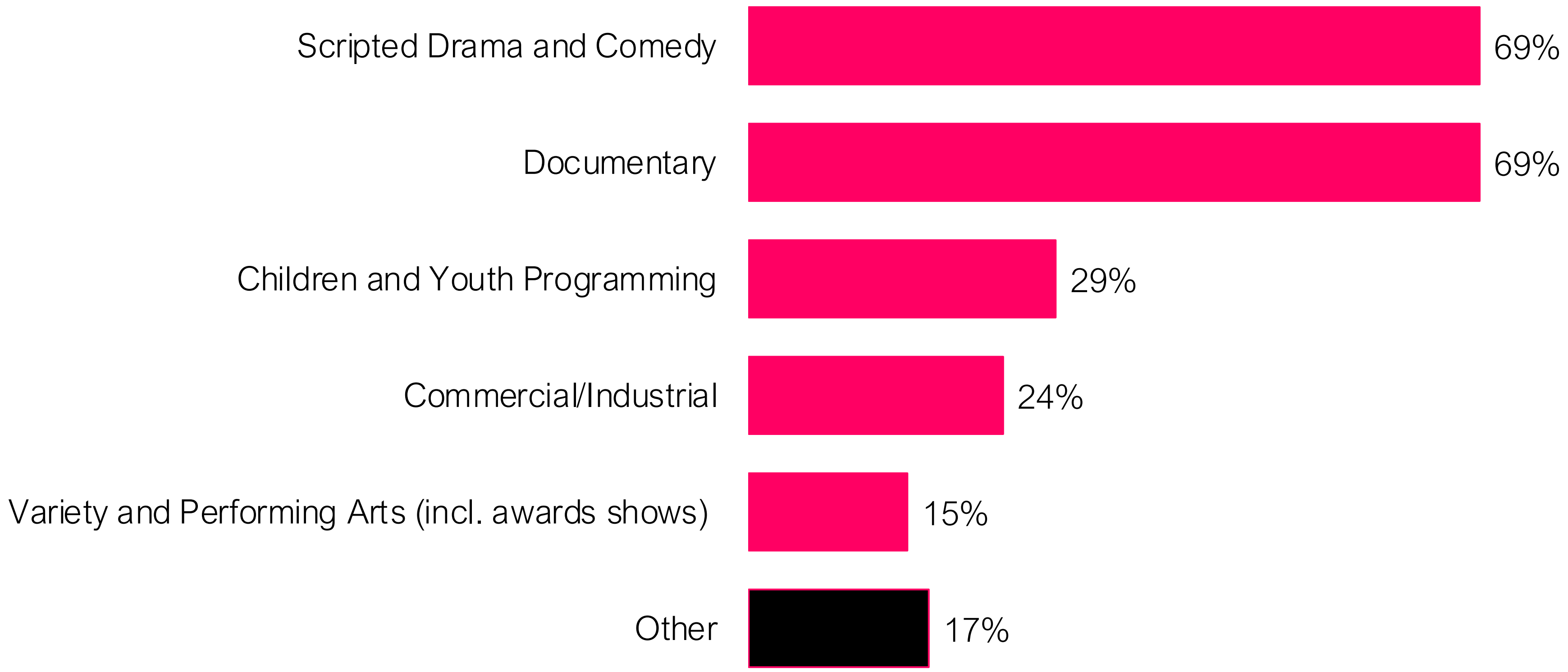
89% of all recipient companies produce **linear content** (live action + animation)

- 54% of companies selected one type only
  - 42% linear live action
  - 3% linear animation
  - 6% interactive
  - 3% production services only
- 46% of companies produce a mix of types

For type production by ethnic/racial group click here

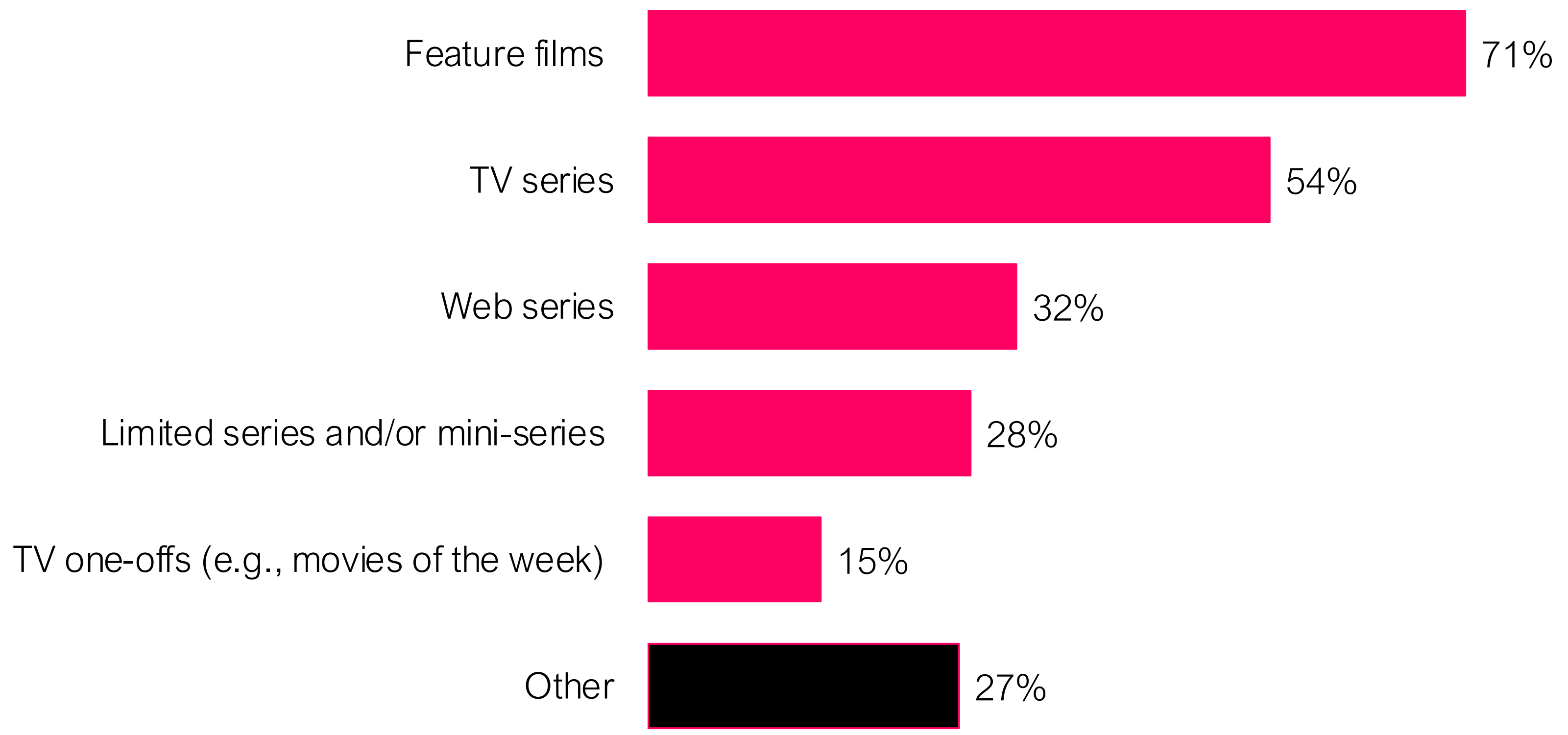
Q28. Is your company a producer of…? Select all that apply. All companies (n=154). MULTI-SELECT

Companies that produce linear content are most likely to focus on scripted drama and documentary. Small proportions produce commercial/industrial content and other, both of which are not funded by the CMF



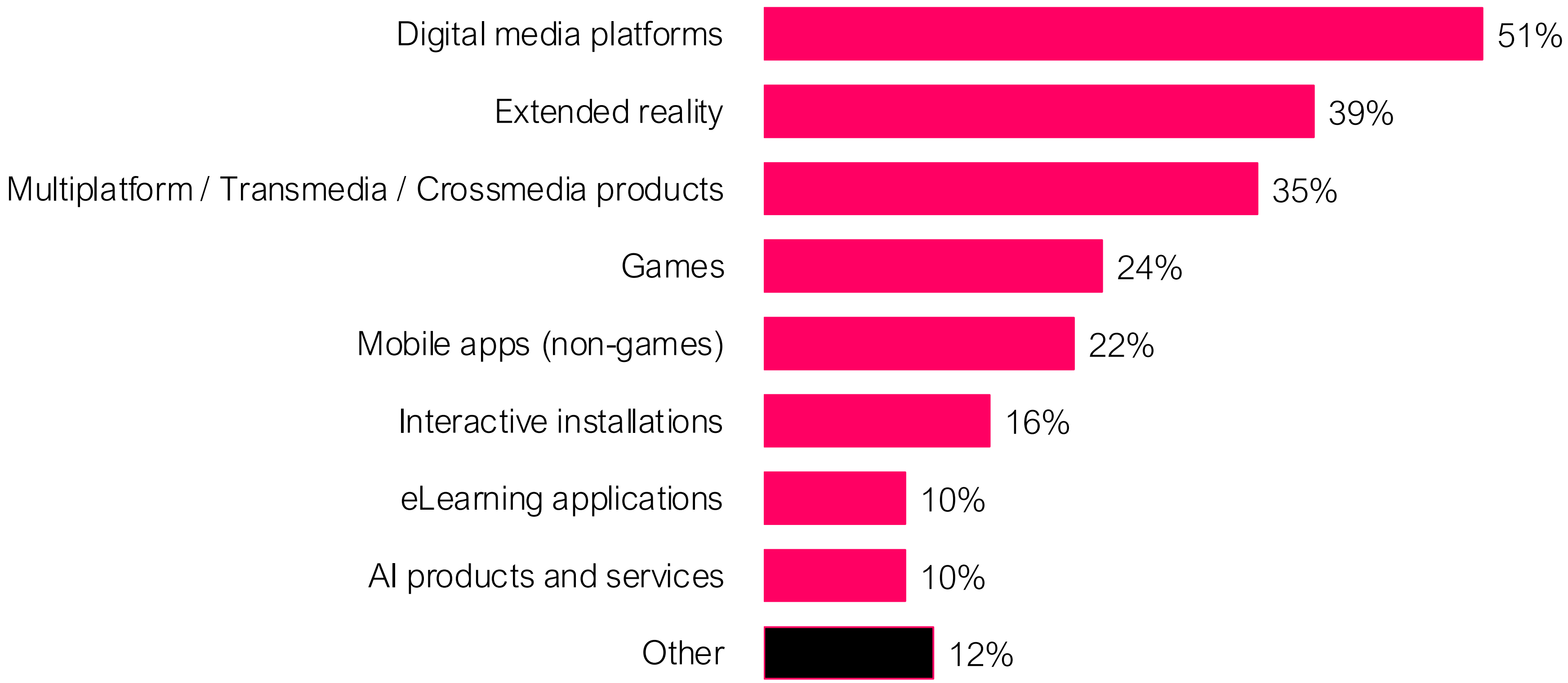
Q30. What portion of your production spending on TV, film and/or web series is in the following genres? Please indicate a percentage.
Companies that produce LINEAR content (n=137)

Companies that produce linear content are most likely to focus on feature films (71%), a format that is also not typically funded by the CMF



Q31. What portion of your production spending on TV, film and/or web series is in the following formats? Please indicate a percentage
Companies that produce LINEAR content (n=137)

Companies that produce digital media work mostly on digital platforms, extended reality and multi-platform products. Companies that produce games are less represented, perhaps due to less need for support funding at this time



Q32. What portion of your production spending on interactive digital media is in the following type of projects? Please indicate a percentage.
Companies that produce digital content (n=49)

Almost 9 in 10 companies produce English-language content; one-third produce French-language content; and 4 in 10 companies produce content in other languages

88% of companies produce English-language content

- 91% in Ontario (n=78)
- 78% in Quebec (n=49)
- 100% in BC (n=17)
- 100% in Rest of Canada (n=10)

36% of companies produce French-language content

- 15% in Ontario (n=78)
- 86% in Quebec (n=49)
- 6% in BC (n=17)
- 10% in Rest of Canada (n=10)

41% of companies produce content in other languages

- 36% in Ontario (n=78)
- 39% in Quebec (n=49)
- 65% in BC (n=17)
- 50% in Rest of Canada (n=10)

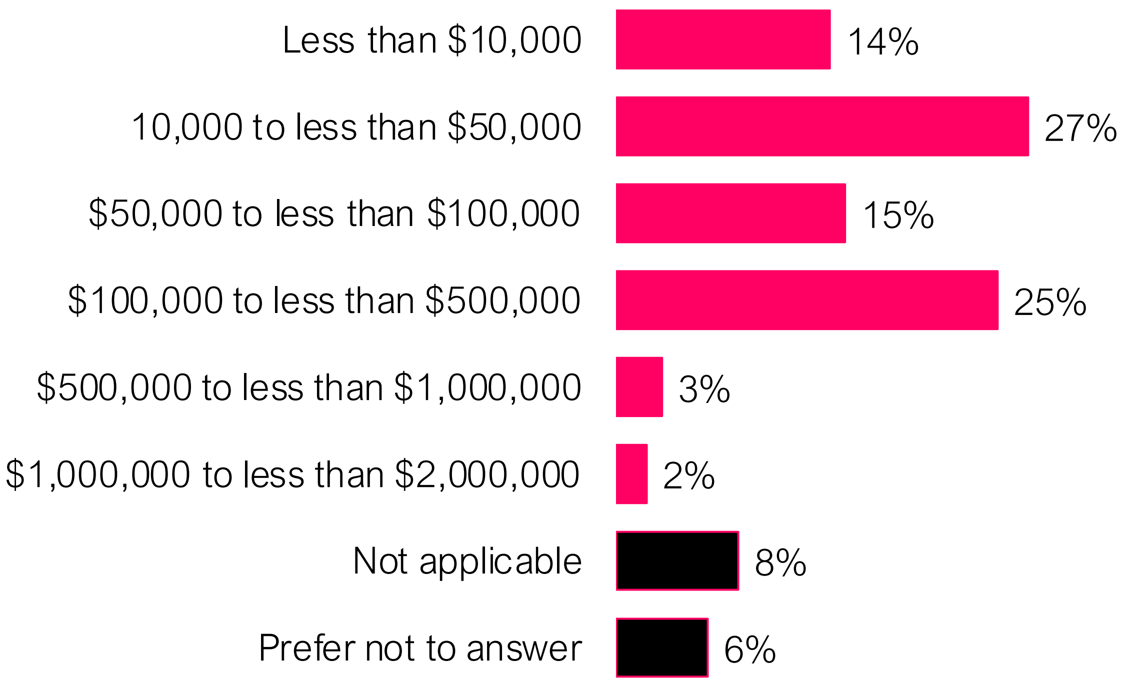
Languages produced (multi-mention) Base:	TOTAL 63
Asian (Net)	22%
South Asian languages (Net)	21%
Arab/Persian/West Asian (Net)	22%
European (Net)	19%
African/Caribbean (Net)	16%
African (Subnet)	11%
Caribbean (Subnet)	8%
Southeast Asian (Net)	13%
English	2%
Nothing	2%

For a list of languages click here

29_1, _2, _4. What portion of your overall production spending is in the following languages? Among those who produce LINEAR or INTERACTIVE content in Q28 (n=154)

SECTION 3.
COMPANIES' OPERATING AND PRODUCTION BUDGETS

4 in 10 companies have smaller operating budgets of <$50K. The average across companies is $169K and median is $75K, increasing significantly with company size



Mean	$168,664
Median	$75,000

	1 employee only	2 to 3	4 to 9	10 to 29
	A	B	C	D
Base:	66	44	34	10
Mean	$69,510	$153,500A	$204,167A	$628,500A
Median	$30,000	$75,000	$300,000	$300,000

Excluding prefer not to answer from mean and median calculations.
A letter indicates that a result is significantly higher for this group when compared to the other group(s).

Q18. What was your company's annual operating budget in 2019 (or the last completed fiscal year)? All companies (n=154)

The mean/median annual operating budget is lower for women compared to men. They are lowest for those in BC, and they are highest for those reporting their racial/ethnic identity as Latin American

	TOTAL	Women	Men	ON	QC	BC	Rest of Canada
		A	B	C	D	E	F
Base:	154	85	84	78	49	17	10
Mean	$168,664	$138,866	$194,142	$168,456	$210,250	$77,000	$134,375
Median	$75,000	$30,000	$75,000	$75,000	$52,500	$30,000	$52,500

	Black	Lat Am	Middle Eastern	South Asian	SE Asian/ E. Asian
		A	B	C	D
Base:	44	17	26	30	40
Mean	$134,264	$423,571	$135,208	$127,678	$184,117
Median	$30,000	$300,000	$52,500	$30,000	$75,000

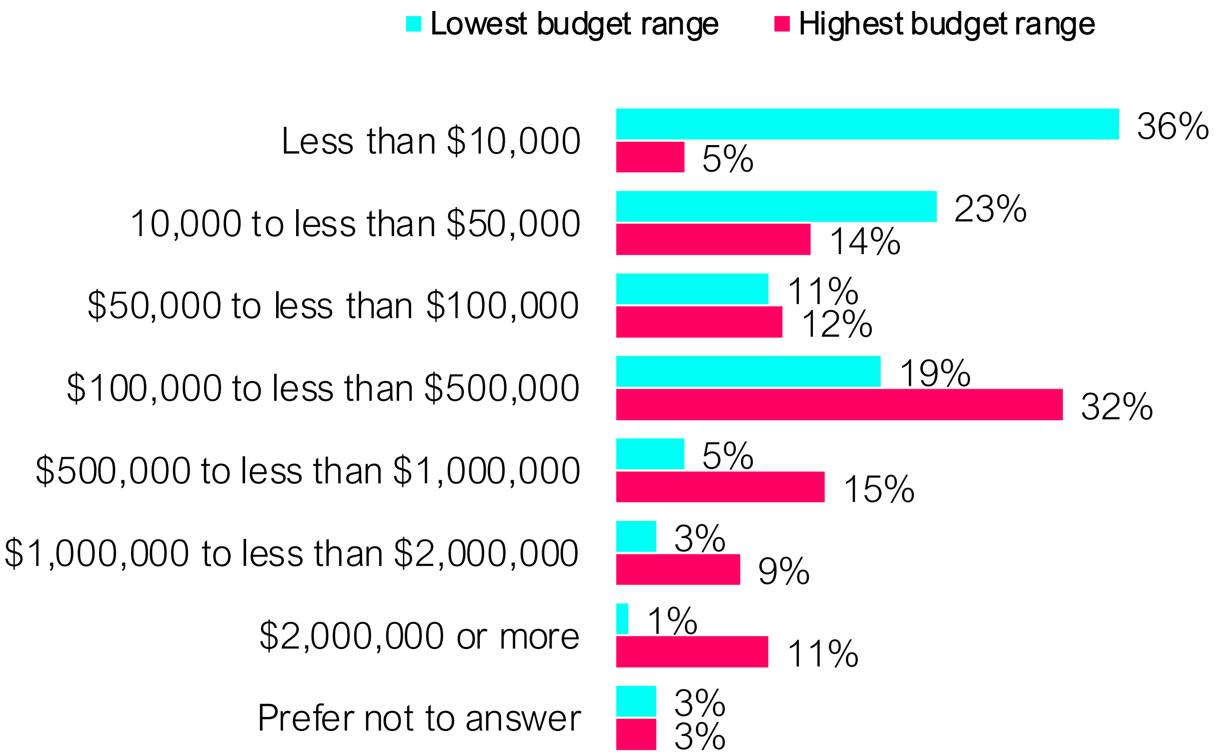
Notes: Companies in BC and rest of Canada have less than 10 employees

Women are slightly more likely than men to work alone with no employees (41% women vs. 33% men)

Q18. What was your company's annual operating budget in 2019 (or the last completed fiscal year)? All companies (n=154)

Excluding prefer not to answer from mean and median calculations. Note that the bases for gender and ethnic/racial groups are all shareholders, not all companies.

Production Budget: Budgets range from a median low of $30K (regardless of size of company) to a median high of $300K (larger size companies have a median high of $525.5K). Almost 6 in 10 say production budget ranges have increased over time



	Lowest budget range	Highest budget range
Mean	$169,513	$590,689
Median	$30,000	$300,000

Excluding prefer not to answer

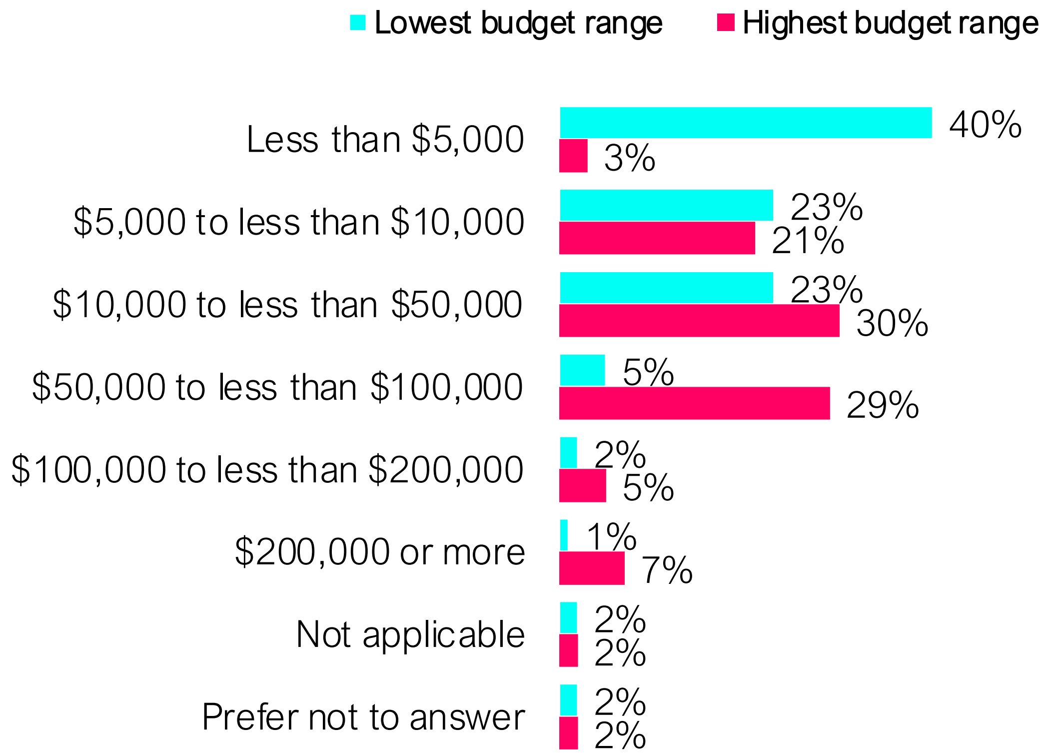
Since the company's foundation, the company's production budget range has tended to…since the company's foundation:

- Increase – 57%
- Stayed the same – 17%
- Decrease – 9%
- Not sure/NA/Prefer not to answer – 16%

Companies incorporated 2017 or before are twice as likely to say that budgets have decreased or stayed the same (31% vs. 15% of companies incorporated after 2017)

Q35. Of all your company's individual projects produced in the last seven (7) years, what was the LOWEST project budget range?
Q35A. Of all your company's individual projects produced in the last seven (7) years, what was the HIGHEST project budget range?
Q36. Since the company's foundation, the company's production budget range has tended to:
All companies, not including those that provide Production Services only (n=149)

Development budget: The lowest budget for many (40%) projects is $5K. The overall median of the lowest budget range is $7.5K, while the overall median of the highest budget range is $30K



	Lowest budget range	Highest budget range
Mean	$21,416	$57,570
Median	$7,500	$30,000

Excluding prefer not to answer

Since the company's foundation, the company's development/prototyping budget averages tended to …since the company's foundation:

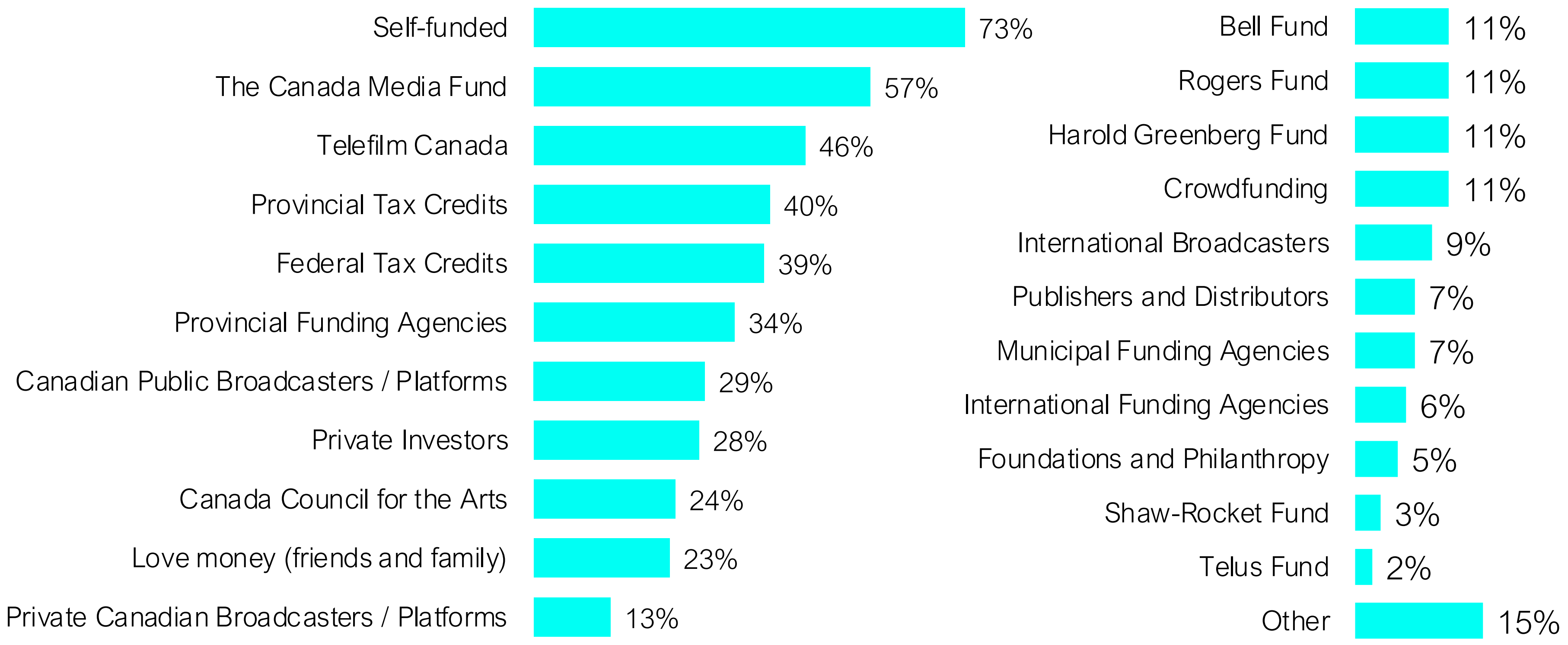
- Increase – 54%
- Stayed the same – 27%
- Decrease – 6%
- Not sure/NA/Prefer not to answer – 13%

Companies incorporated 2017 or before are three times as likely to say that budgets have decreased or stayed the same (41% vs 13% of companies incorporated after 2017)

Q39. In this question, we ask about both the lowest and highest development/prototyping budget range of all your company's individual projects in the last seven (7) years. Of all your company's individual projects in development in the last seven (7) years, what was the LOWEST project development budget range?
Q39A. Of all your company's individual projects in development in the last seven (7) years, what was the HIGHEST project development budget range?
Q40. Since the company's foundation, have the development/prototyping budget averages tended to:
All companies, not including those that provide Production Services only (n=149)

Companies rely on a wide range of funding sources: the majority say their projects include self-funding (73%), while CMF is the second largest fund (57%)

Other top funding agencies/bodies include Telefilm, tax credits provided by both provincial and federal level governments, and provincial funding agencies. Following this is Canadian public broadcasters/platforms, private investors, Canada Council for the Arts, as well as Love Money.



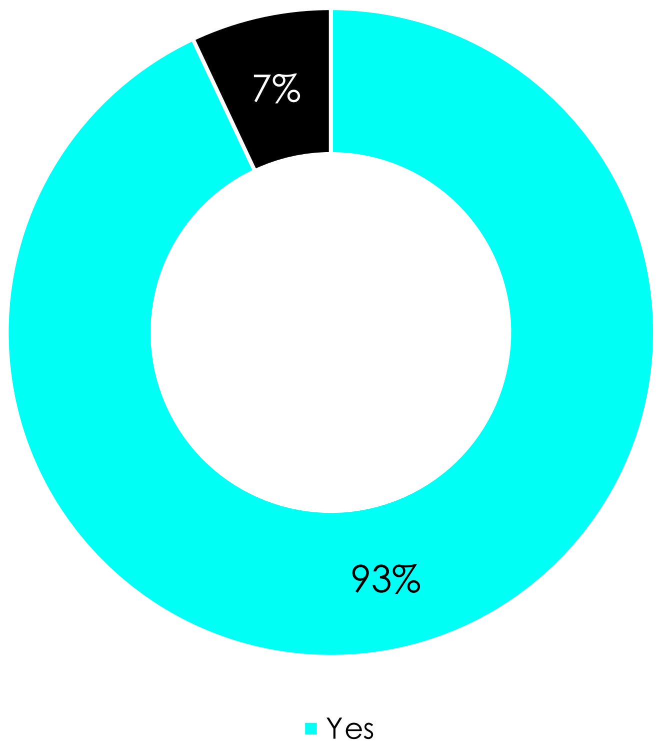
# of funding sources	
1 only	5%
2-3	30%
4-5	28%
6+	36%

Q41. Which of the following are the most common sources of funding for the projects that the company is currently producing and/or developing over the past seven (7) years? All companies, not including those that provide Production Services only (n=149)

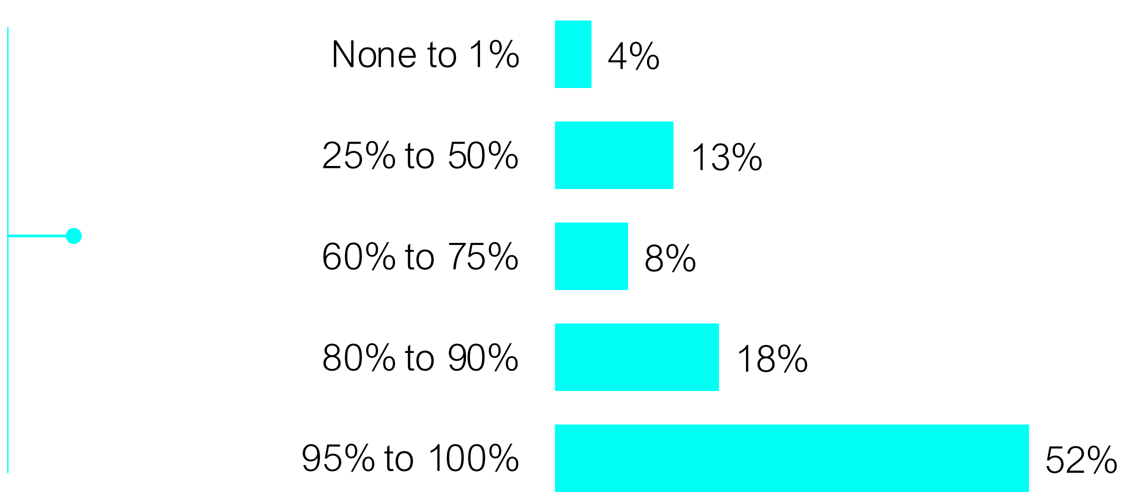
SECTION 4.
EFFORTS TOWARDS REPRESENTATION AND STRUCTURAL BARRIERS

A majority of companies have policies or make a conscious effort to create content about BIPOC communities – currently 7 in 10 of these report a majority/ all their current projects (80-100%) are about BIPOC

Policy/conscious effort to create content about BIPOC



Percentage of current projects about BIPOC
(among companies that have policy, n=138)



Q42. Does the company have a policy or make a conscious effort to create content about racialized, Black, Indigenous, or People of Colour communities? All companies, not including those that provide Production Services only (n=149)
Q43. What percentage of your current projects are about racialized, Black, Indigenous or People of Colour communities? All companies that have a policy (n=138)

There is a high level of ethnic and racial representation among employees across companies: a majority of companies (81%) report that half or more of their employees identify as BPOC. 64% report the same for contractors (lower proportion among larger-sized companies)

Employees

57% of companies have more than one employee.

	Company size: number of employees			
	TOTAL	2 to 3	4 to 9	10 to 29
Base: companies >1 employee	88	44	34	10
AVERAGE number of employees	3.2	2.3	5.4	15
All employees (100%)	49%	66%	32%	30%
50% to 90%	32%	20%	44%	40%
SUM 50% or more	**81%**	**86%**	**76%**	**70%**
Less than 50%	15%	11%	15%	30%
None/NA/Don't know/Prefer not to say	4%	2%	9%	-

Freelance contractors

70% of companies hired freelance contractors.

	Company size: number of employees				
	TOTAL	1	2 to 3	4 to 9	10 to 29
Base: companies 1+ freelancers	108	35	32	31	10
AVERAGE number of contractors	6.2	6.9	4.8	5.7	9.8
All freelancers (100%)	28%	31%	25%	29%	20%
50% to 90%	36%	34%	44%	39%	10%
SUM 50% or more	**64%**	**65%**	**69%**	**68%**	**30%**
Less than 50%	16%	17%	16%	13%	20%
None/NA/Don't know/Prefer not to say	20%	17%	15%	19%	50%

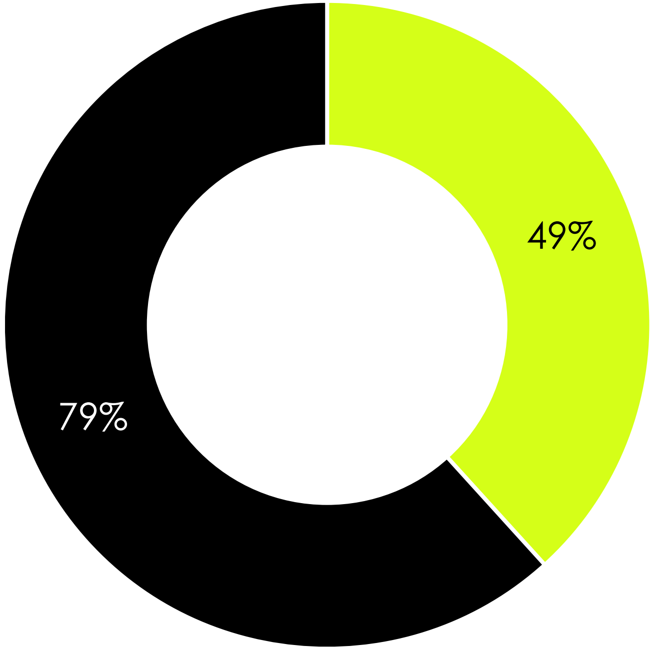
Q20. How many full-time and part-time employees (including yourself) did the company employ on March 1st, 2020? Please indicate a number. All companies (n=154). Q21. Approximately, what percentage of these employees, if any, would you say self-identify as belonging to a racialized/BIPOC community? Companies with >1 employee (n=88). Q24. How many freelance contractors did the company employ on March 1st, 2020? All companies (n=154). Q25. Approximately, what percentage of these contractors, if any, would you say self-identify as belonging to a racialized group? Companies that employed freelance contractors (n=108)

Recipients selected a range of barriers to their company's stability and success. Most say limited or no access to broadcasters, systemic racism and bias, and lack of representation at the decision level are the biggest barriers

Q46. In today's context, what are the biggest obstacles or barriers for your company's stability and success? All companies (n=154)

Recipients provided a range of short-term solutions that could be implemented by the CMF to better serve BPOC companies

Percentage of companies that provided a response



The key themes that emerged include:

- Make funding eligibility/criteria requirements easier for BPOC, such as:
  - Expand the definition of Canadian content, i.e., relaxing language requirements and story setting stipulations
  - Address the development threshold for broadcasters to access CMF funds
- More funding, and specifically funding for development
- Increase representation among (and therefore access to) “gatekeepers” and decision-makers
- Move past the same players and work with new companies; support the less experienced
- Setting quota targets/ point system
- Apply a similar model developed for women
- More access to (personalized) business support information/advice; mentorship
- Support for marketing of BPOC activities and distribution
- Support the creation of a directory, hub or forum for networking and opportunities
- Programs for training
- Support racialized/under-represented groups to tell their own stories
- Increase conversations: listen to and understand BPOC matters
- Initiatives like emergency fund are in the right direction; CMF is a leader is this area

Q47. Could you provide suggestions as to the types of short-term solutions that could be implemented by the CMF to better serve companies owned by racialized, Black People and People or Colour in Canada? Please elaborate. All companies (n=154)

Appendix – Additional Slides

Recipients identifying as Latin American tend to be younger (between 30 and 49 years old) than those identifying as Black, Middle Eastern, South Asian, and Southeast Asian/East Asian

		SELF-IDENTITY					
	TOTAL	Black	Lat Am	Middle Eastern	South Asian	SE Asian/E. Asian	Mixed race
		A	B	C	D	E	F
Base:	193	58	19	29	41	48	18
AGE							
<30	6%	9%	-	-	17%CE	2%	11%
30-39	18%	19%	21%	21%	12%	19%	33%
40-49	28%	16%	58%ADE	34%	15%	31%	33%
50 plus	33%	31%	5%	34%B	44%BF	35%BF	11%
GENDER							
Woman	47%	50%	47%	41%	44%	50%	39%
Man	50%	47%	53%	52%	56%	46%	50%

Q8/8A. How do you prefer to self-identify?;
Q12/12A. In what year were you born? Please enter a year. All shareholders

Green indicates a statistically significant difference
A letter indicates that a result is significantly higher for this group when compared to the other group(s).

Member of a diverse ethno-cultural group or community is the preferred term, but there is some differentiation by ethnic/racial group and age

For example, those who identify as Black select *BIPOC* (50%) and *BPOC* (48%) as their preference, followed by *Person of Colour* and *Racialized Person*. Those identifying as Middle Eastern/N. African are most likely to select *Member of a diverse ethno-cultural group or community* (72%) and *Member of an underrepresented community in Canada* (45%). Those younger show greater preference for *BIPOC* and *Person of Colour* than those older. There is little difference by gender (not shown in table).

		SELF-IDENTITY						AGE		
	TOTAL	Black	Lat Am	Middle Eastern	South Asian	SE Asian/E. Asian	Mixed race	<39	40-49	50+
		A	B	C	D	E	F	G	H	I
Base:	193	58	19	29	41	48	18	47	55	63
Member of a diverse ethno-cultural group or community	47%	29%	**47%**	**72%ADF**	**41%**	**56%**	28%	**45%**	**47%**	**51%**
Acronym: BIPOC (Black, Indigenous and People of Colour)	40%	**50%BC**	16%	28%	**44%B**	38%	**67%BCE**	**57%HI**	27%	33%
Person of Colour	39%	**33%**	**42%**	28%	**56%AC**	**50%**	33%	**57%HI**	27%	33%
Acronym: BPOC (Black People and People of Colour)	35%	**48%**	26%	28%	34%	35%	39%	**45%H**	24%	33%
Visible Minority	31%	19%	32%	31%	22%	**52%AD**	39%	28%	**40%**	29%
Member of an underrepresented community in Canada	30%	19%	**37%**	**45%A**	32%	33%	33%	32%	**44%I**	22%
Racialized person	23%	**33%D**	26%	24%	10%	21%	33%D	23%	22%	21%
I am not personally comfortable with being identified with any of the above terms	15%	16%	11%	14%	24%E	6%	11%	9%	16%	19%

Q5/5A. The terminology used to address underrepresented communities in Canada changes over time, yet often the communities only have a limited say on how they prefer to be identified. Are you personally comfortable in being identified as any of the following terms?

Bold highlights indicates top ranked terms by subgroup.
Green indicates a statistically significant difference
A letter indicates that a result is significantly higher for this group when compared to the other group(s).

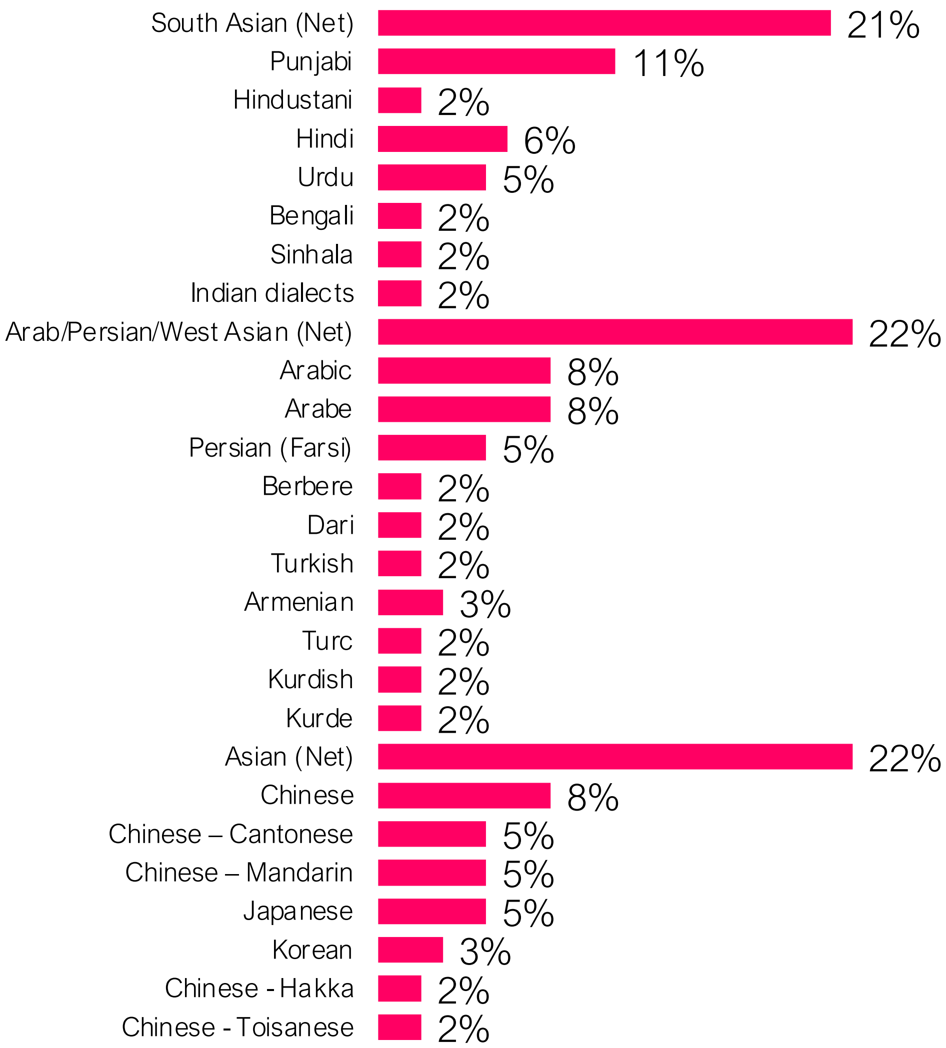
Companies owned by those identifying as Black and Latin American are more likely to produce interactive digital media content than companies owned by other groups

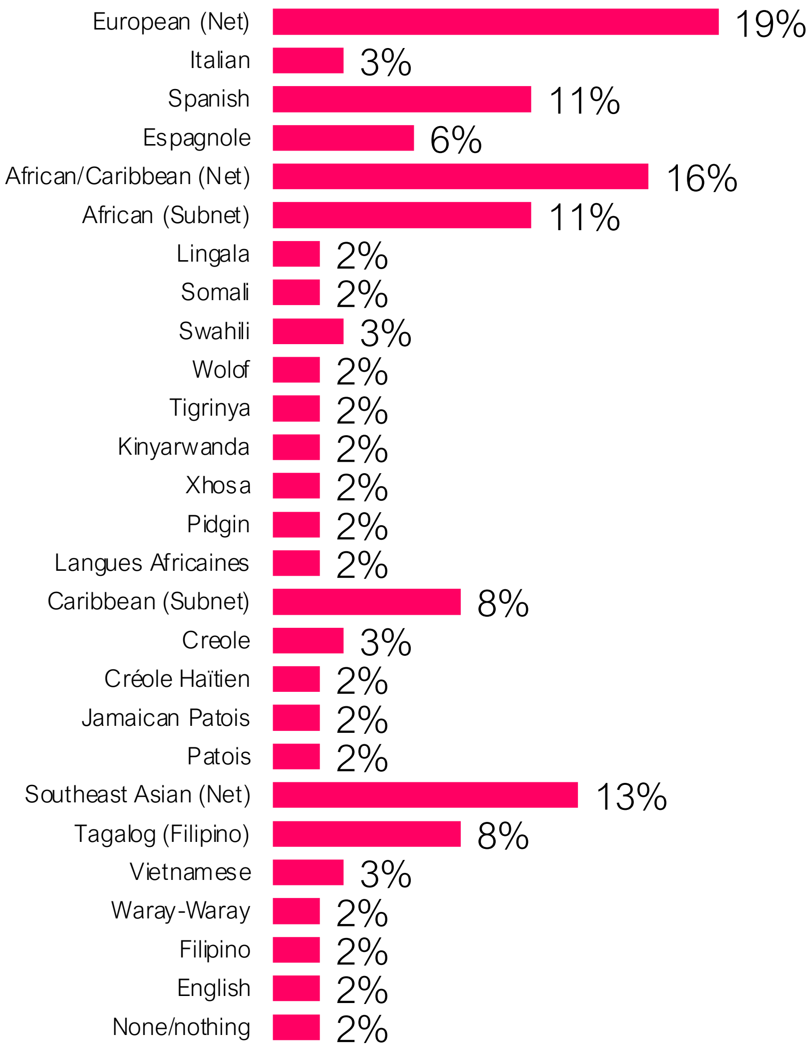
	TOTAL	Black	Lat Am	Middle Eastern	South Asian	SE Asian/E. Asian
		A	B	C	D	E
Base:	154	44	17	26	30	40
Linear content: LIVE ACTION (film, TV and/or web series)	84%	93% BE	71%	92%	87%	78%
Linear content: ANIMATION (film, TV and/or web series)	20%	30%	24%	15%	13%	18%
Interactive digital media content (games, apps, websites, etc.)	32%	45% E	47%E	31%	27%	18%
Production services to other companies	31%	27%	41%	35%	23%	35%

A letter indicates that a result is significantly higher for this group when compared to the other group(s). Note that the bases for gender and ethnic/racial groups are all shareholders, not all companies.

Q28. Is your company a producer of…? Select all that apply. All companies. MULTI-SELECT

Languages produced among those who produce non-official language programming





Q29_4. [Other] What portion of your overall production spending is in the following languages? (companies that produced in-language, n=66) Open-ended mentions

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