

SEPTEMBER 2023

# NEW FUTURES<sup>1</sup> FOR CANADIAN CONTENT: WHAT YOU SAID



CANADA  
MEDIA FUND

FONDS DES MÉDIAS  
DU CANADA



Demains

# CREDITS

This project incorporates academic research, consultations, polling, and foresight workshops to mobilize the collective intelligence of the industry in reimagining outmoded problems in fresh, new ways. To all who participated in the interviews, surveys, workshops, and in sharing their thoughts, thank you for being such an important part of this process.

Special thanks to those who diligently recorded the voices behind this far-reaching exercise: Méralie Murray-Hall and Amélie Ward from Humains Humains, Maxime Bourbonnais from MBA Recherche, my partners at La Société des demains (Catherine Mathys and Patrick Tanguay), and collaborators Marie Lods and Marianne Richard.

I'm especially grateful to the Canada Media Fund (CMF) team for their confidence and support: Mathieu Chantelois, Kyle O'Byrne, Jared Morrow, Marcia Douglas, and Valerie Creighton, whose bold leadership has left a lasting legacy on the entire industry.

On a personal note, I'm indebted to my family for their patience during the long hours this project required, and my friend Pierre Tanguay for his exceptional contribution to the final compilation of this report. Merci.

La Société des demains for the Canada Media Fund  
September 13, 2023

## FROM THE COVER

<sup>1</sup> Colin Gray (quoted in Hoffman F.G., 2018): "There is not a single discrete future out there in the time to come. Instead, there are almost certainly an unknowable number of possible futures. The past is singular ... the future, in sharpest contrast, assuredly plural."

## Report compilation

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La Société des demains would like to acknowledge that the outreach for this initiative reached creators and communities across Canada, from coast to coast to coast. These lands and waters are the unceded and treaty territories of First Nations, Inuit, and Métis peoples.

La Société des demains is based in Montréal / Tiohtià:ke. We honour and thank the traditional custodians of this land and strive to work for the success of future generations.

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Thanks to all participants for their time, knowledge, and expertise.

Ce rapport est également disponible en français.

The content of this report is a compilation of insights shared by numerous participants involved in the research project. The views expressed within this material are drawn from the collective input of these contributors and do not solely reflect the stance of the author, nor the views of the Canada Media Fund. Nothing in this report should be construed as a formal recommendation, and the Canada Media Fund is under no obligation to adhere to any suggestions or guidance presented herein.

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# A message from Valerie Creighton, President and CEO of the Canada Media Fund

Canadian content matters to all Canadians. This is who we are. These are our stories. They represent all our storytellers, across all platforms.

The incredible response we received for our CanCon research initiative over the last year proved that defining Canadian content matters. Our premise was simple: spark a national conversation about what Canadian content means to the industry and the Canadian public as the CRTC begins the process of modernizing its regulatory framework. What is at stake? Why does it matter? What do we want the future of the industry to look like?

That simple premise turned into a huge project, led by the independent research team La Société des demains. One year of research and conversations, kicked off with a panel of experts at Content Canada 2022. An online survey for the industry and the public, face-to-face interviews, in-person and virtual foresight workshops, and many written submissions, alongside discussions at industry events and a series of articles in *Now & Next*, the CMF's editorial voice.

The findings from this initiative reveal an extraordinary array of perspectives on what Canadian content means and how it should be supported. Participants shared hopes, fears, challenges, and opportunities for the future of CanCon in a rapidly changing media landscape.

Our goal was never to “define” Canadian content. That is the CRTC's job. Rather, we wanted to offer a variety of ways for industry and the public to give feedback on what CanCon means to them – and to perhaps show that people agreed on more points than they realized, despite some fractious debates around the *Online Streaming Act*. We wanted to democratize the conversation. We wanted to create a forum that would enrich the conversations being had about the future of Canadian content and our industry.

2,800+ participants from coast to coast to coast. Over 1,000 hours of feedback from industry and the public. And after Demains combed through all that data, we are very proud to bring you the final report: *New Futures for Canadian Content: What You Said*. Inside you will find common themes, tensions, and trade-offs that emerged over the course of the initiative, as well as some of the ideas and solutions that were proposed.

Thank you to lead researcher Catalina Briceño and the entire team at La Société des demains for your hard work, and to everyone from the CMF who contributed, with a special shout out to Kyle O'Byrne, who was a catalyst for this project from the very beginning.

Finally, a huge thank you to everyone from the industry and the public that took the time to provide your input. We are living in a historic moment and what you said will play a critical role.

Sincerely,



Valerie Creighton, C.M., S.O.M.  
President and CEO, Canada Media Fund

# PART 1

# PURPOSE OF THE INITIATIVE AND KEY CONCEPTS

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## YOUR WORDS

You will find text bubbles throughout this report with actual comments from participants on the various topics covered. Because anonymity is a fundamental feature of this initiative's approach, the names, titles, and affiliations of speakers have not been included. We also decided not to disclose the job descriptions of those presenting their perspectives to safeguard unbiased interpretation and allow greater latitude for freedom of expression. They are simply referred to as participants, respondents, professionals, or interviewees.

## Context

The Canada Media Fund (CMF) set out to start a national conversation about what Canadian content (CanCon) means to industry professionals and to the Canadian public at this historic moment for the audiovisual industry. The introduction of Bill C-11, the *Online Streaming Act*<sup>2</sup>, has led to considerable industry debate about its implications for the television, film, and digital media sectors. In tandem with the ensuing regulatory initiatives being undertaken by the Canadian Radio-television and Telecommunications Commission (CRTC), industry-wide transformations are anticipated<sup>3</sup>. What does all this signify for the current and future status of Canadian content?

The purpose behind this year-long national conversation was not to bring the debate to a conclusion, but to initiate dialogue and stimulate renewed discussions. The CMF tasked La Société des domaines to consult a wide spectrum of industry professionals and the Canadian public nationwide to collect their thoughts on what *Canadian content* and *CanCon* mean to them. A range of research methods were used to this end, including comprehensive ethnographic interviews, an online survey, and written submissions, as well as online and in-person foresight workshops. The CMF-sponsored initiative was not designed to redefine CanCon, but to drill down into its complexities. Details on the methodologies used are provided in the Appendix.

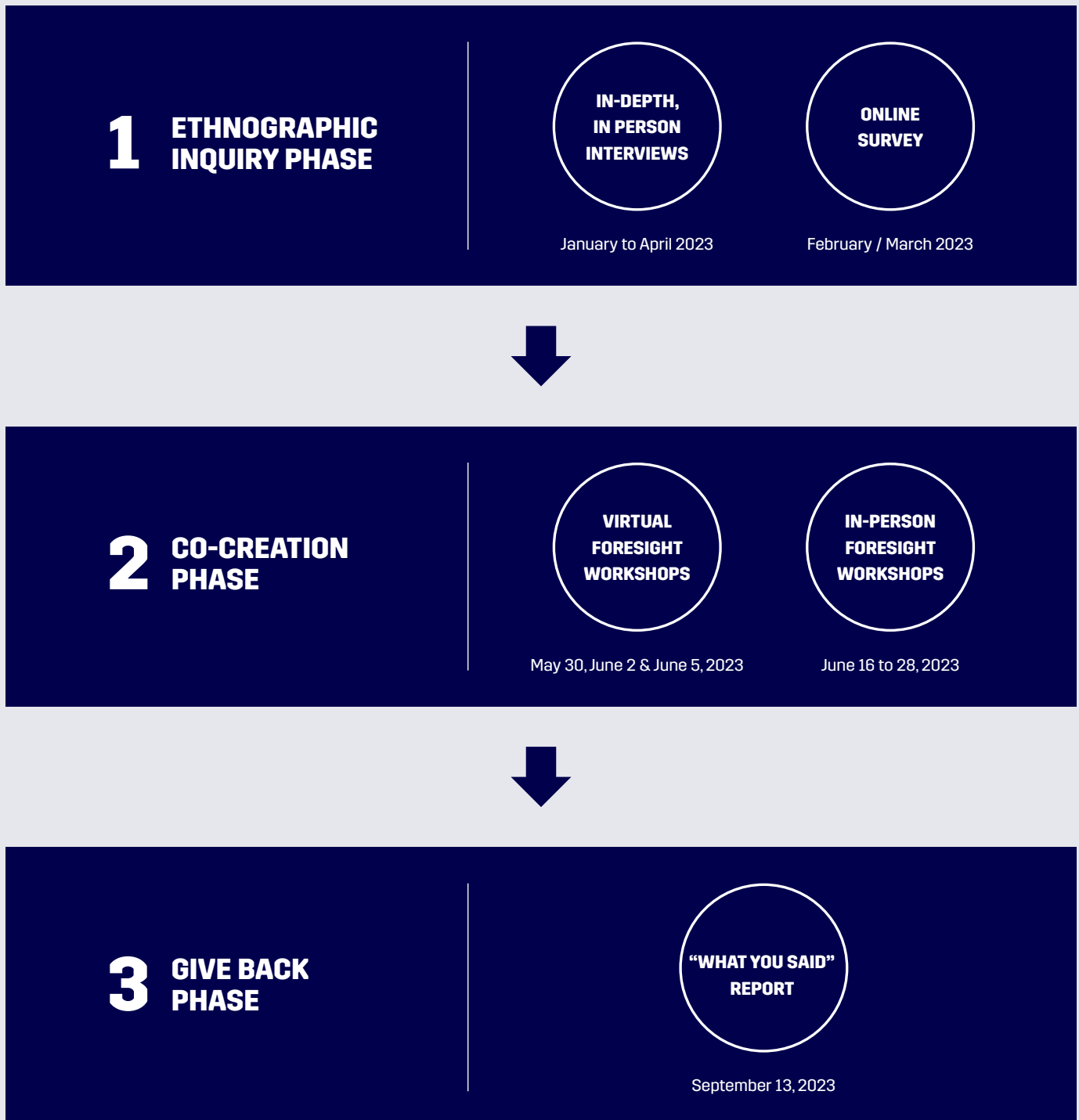
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<sup>2</sup> While research focused on the audiovisual sector encompassed all screen production, it excluded the audio/music sectors covered in the *Online Streaming Act* (Bill C-11). Discussions also excluded news and sports content covered by the Canadian Radio-television and Telecommunications Commission (CRTC).

<sup>3</sup> The CRTC plan to modernize the broadcasting system can be found [here](#).

## METHOD OF INVESTIGATION

The method of investigation was designed so that none of the phases would be interpreted independently. The survey questions were based on what was said during the interviews, and the workshops were developed based on the results of the previous two phases. This report is a compilation and synthetization of all data streams to provide a balanced platform for the voices of all that participated.



## A multidisciplinary, multiphase research project

The intention of the year-long research initiative was to create an inclusive space where anyone in the industry who feels interested and implicated in the current process surrounding the modernization of the regulatory framework for Canada's audiovisual sector could join in the discussion. Research was deployed in three major phases, each involving a series of activities designed to survey, consult, and question industry professionals and, in some instances, the Canadian public. While various data-collection approaches were employed, drawing mainly from the social sciences, the primary objective was to consistently explore the dimensions and changing contexts of CanCon, giving these priority over a strict examination of the regulatory and policy definitions.

It's worth noting that participants shared a variety of viewpoints about this CMF-sponsored initiative. Some suggested that the CRTC might be better positioned to conduct formal consultations on CanCon, while some questioned the CMF's role within this context. Others felt that the timing of the initiative was premature, given that when the research initiative started in January 2023, the *Online Streaming Act* had not yet passed, and the CRTC had not yet launched its formal proceedings to modernize the regulatory framework. Participants also raised concerns about specific topics or questions addressed in the online survey. These concerns were duly noted throughout the data-collection process and had an impact on the interpretation of the information that was gathered. There were also stakeholders who chose not to participate in this initiative for the reasons mentioned above as well as for unrelated reasons, including lack of time or resources.

## MEASURES & PRECAUTIONS

While some participants had reservations, most expressed positive interest and appreciation for the opportunity to add their views and experiences. Over 2,800 individuals and organizations took part in one or more stages of the study. To ensure a high level of commitment and transparency, the research team implemented the measures and precautions below:

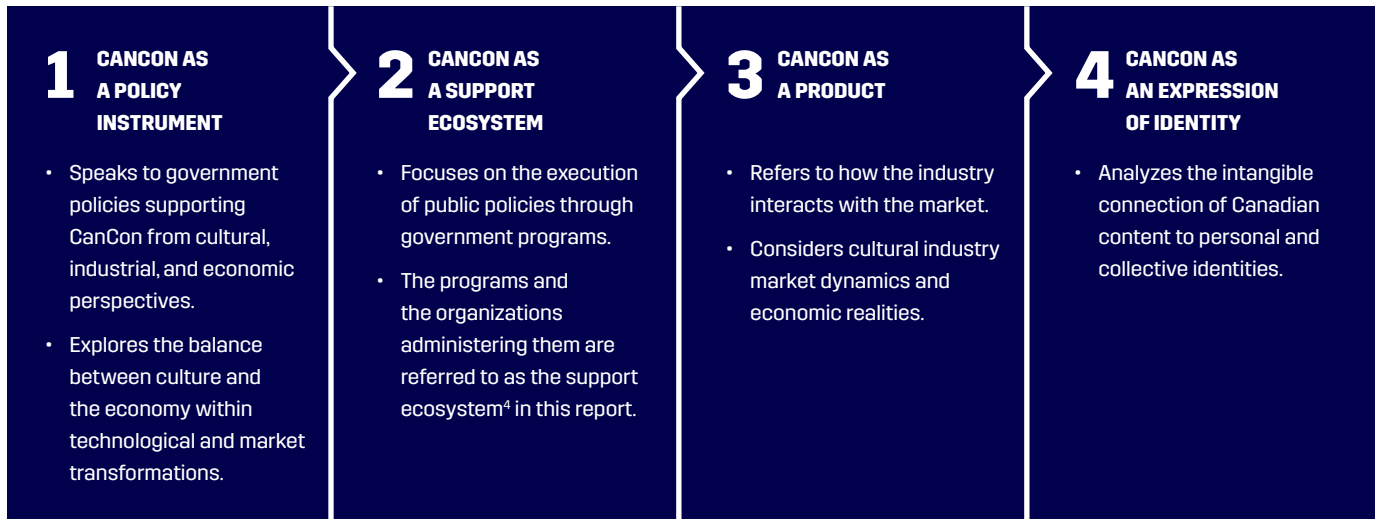
- Online survey questions were carefully based on insights gleaned from the ethnographic research component. Researchers and CMF staff made themselves available to any stakeholders that had feedback about the format to clearly outline the methodology, answer questions, and address any concerns wherever possible.
- A significant number of participants were concerned that our wide-ranging initiative might exacerbate existing tensions within the industry. These concerns informed the research approach, which was based on inclusion, respect, encouraging openness, collaborative discussion, and constructive criticism.
- The research team emphasized diversity, equity, and inclusion, as well as the recognition of cultural and linguistic differences, in response to the pressing need for representation and visibility voiced by participants subject to systemic exclusion, including Indigenous Peoples, racialized communities, linguistic minorities, and those with disabilities.



## Unpacking CanCon: a multifaceted concept

In examining the information collected over the course of the initiative, it became very clear that CanCon itself has a number of different meanings depending on the stakeholder and the context. Some participants used CanCon and Canadian content interchangeably, while others used them differently to reflect certain nuances and intricacies.

More specifically, when participants spoke about CanCon, it was in relation to a wide range of themes, from policy and funding their audiovisual projects to markets, creative freedom, cultural identity, and much more. We have organized the diverse interpretations of CanCon into **four distinct conceptual angles** to better represent the breadth and depth of the ideas and perspectives presented.



In the following pages, we expand on what you said about CanCon from the four distinct conceptual angles above. Notably, each subsequent section exists as an effect of the previous section, demonstrating an interrelation and linear progression stemming from the first concept: CanCon as a Policy Instrument. While the focus is mainly on the views of industry professionals, perspectives drawn from the Canadian public<sup>5</sup> are included as well. We then conclude with a few words on key areas where views converge and align and share thoughts from some of your peers on what they hope to see for the industry in the years to come. We sincerely hope this report contributes to building bridges and to exploring new ideas and perspectives.

**“WHAT’S SPECIAL ABOUT THE DEFINITION OF CANCON IS THAT THE ANSWER CHANGES DEPENDING ON WHO YOU’RE TALKING TO.”**

<sup>4</sup> We use the term *support ecosystem* because it best describes how government policies are put into practice through funding programs to support the audiovisual industry, functioning like a connected system, with interdependencies and shared responsibilities.

<sup>5</sup> Feedback from the Canadian public was exclusively obtained through the online survey. When presented, the information is distinctly labeled as “general population” or “Canadian population.” For comparison, the online survey participants were n=1556 for the industry professionals sample and n=1001 for the general population sample.

## PART 2

# WHAT YOU SAID ABOUT ...

## 1. CanCon as a Policy Instrument

In this section, we cover what participants said about government policies in support of CanCon, assessing the balance between culture, industry, and the economy. We also look into what was said about Canada's evolving relationship with the US content market. While these topics have long been part of the discussion relating to government intervention in Canada's audiovisual sector, recent breakthroughs in technological innovations and market transformations – as well as the call for reconciliation and greater equity, diversity, and inclusion – have intensified the discussion.

Most participants in the online survey portion of our research initiative said they saw value in policy<sup>6</sup> interventions supporting the country's audiovisual industry. Both our general population (73%) and industry professional (94%) respondent groups agreed on government intervention in the sector, particularly through financing, which is discussed more specifically in Section 2: CanCon as a Support Ecosystem.

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<sup>6</sup>When policy or government are referred to in this report, it should be interpreted as federal-level policies or the Government of Canada.

Survey responses also reflected the view that policy should address both culture and the economy. This aligns with the objectives outlined in the Creative Canada Policy Framework, which lays out the fundamental principles guiding the government's support for various sectors, including the audiovisual industry. This overarching policy framework provides clarification about open-ended concepts such as economic benefits (allowing for more effective competition with foreign productions and the *economic benefits* it provides in return) or *cultural values* (as a commitment to linguistic duality, cultural diversity, and a renewed relationship with Canada's Indigenous communities).

While not everyone is thoroughly familiar with the Creative Canada Policy Framework (please see sidebar for more), support for Canadian culture and promoting economic growth for audiovisual creators and companies were cited as the primary reasons government intervention was given a thumbs up. This consensus was shared by both industry professionals (71%) and the Canadian population (79%).<sup>7</sup> In supplementary interviews, finding the right balance between strategies that enhance the economic dimension and those that promote cultural aspects stood out as the fundamental factors for effective intervention in the sector.

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#### LEARN MORE

The Creative Canada Policy Framework was released in 2017 to chart “the course for federal policy tools that support our creative industries.” This policy includes the screen industry in both its cultural and economic dimensions. “The Government recognizes the benefit of having a strong creative sector and its impact on Canada's identity, economy, and place in the world.” To learn more about Creative Canada, please [click here](#).

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<sup>7</sup>Total sample (n=2557): general population sample (n=1001) and industry professional sample (n=1556)

“AS YOU KNOW, WE LIVE NEXT DOOR TO ONE THE LARGEST MEDIA COUNTRIES IN THE WORLD. CANADA HAS ALWAYS BEEN CONCERNED WITH BEING OVERWHELMED WITH AMERICAN CONTENT, EVER SINCE THE EARLY DAYS OF RADIO.”

## Proximity to the US perceived as threat and opportunity

Canada’s relationship with the US continues to be a key factor in how policy balance is perceived, again in terms of cultural, industrial, and economic impact. On the cultural front, proximity to the US market has been a key consideration in policymaking since the Massey Report and the country’s first cultural policies from the early 1950s, as was unpacked in a CMF [CanCon explainer article in \*Now & Next\*](#).

Canadian worries about Americanization was a recurring topic in discussions with industry professionals. In today’s context, many participants attributed these concerns to widespread exposure to burgeoning American content and the ongoing rise of multinational platforms.

It is clear that American content has always played a major role in Canada’s media landscape (please see sidebar on page 13 for our findings on content consumption), but the advent of global content platforms has significantly upped the ante. In that regard, survey responses reveal strong concerns on matters of access and discoverability. Providing more Canadian content and increasing its prominence on screens (primarily on streaming and VOD services) were deemed “important” or “very important” by the majority of survey respondents (general population and industry professionals).

### SURVEY QUESTION

On a scale of 1 to 10, where **1 is not at all important** and **10 is very important**, please rate what each of the following statements means to you:

	GENERAL POPULATION	INDUSTRY PROFESSIONALS
That there should be a <b>greater quantity</b> of Canadian content (CanCon) available on streaming and Video On Demand (VOD) services	Important or very important: 60%	Important or very important: 76%
That Canadian content (CanCon) should be <b>more prominent and visible</b> on streaming and VOD services	Important or very important: 57%	Important or very important: 72%

Total sample (n=2557): general population sample (n=1001) and industry professional sample (n=1556)

There were concerns voiced about the growing presence of American companies in the Canadian audiovisual sector, including streaming platforms and foreign production services. Some participants suggested that the shifting landscape could result in policies that prioritize economic considerations, potentially benefiting larger corporations while compromising cultural enrichment across the country.

Other participants felt that Canada's proximity to the US market has its advantages, providing opportunities and acting as an important business lever that enables the industry to thrive in a highly competitive global market.<sup>8</sup> Others said partnerships and training with American creators, distributors, and community builders can provide valuable insights and expertise that can contribute to the growth and success of Canadian talent.

These issues are in line with the top priorities for policymakers identified by survey respondents. It is worth noting that the general population and industry professionals share mutual priorities, including two out of the three outlined below.

### THE IMPACT OF AMERICAN CONTENT ON ONLINE VIEWING CHOICES<sup>9</sup>

An analysis of the online survey data confirmed the prominence of American content for both industry professionals and the general population, where it now accounts for 53% of total consumption on streaming or VOD services. The analysis also revealed a slight deviation in origin of content preferences between the two samples: 28% of the Canadian population preferred Canadian content compared to 24% for the industry professional sample. This could be attributed to regional viewing habits. Quebecers have a greater preference for Canadian content viewed online (35%)<sup>10</sup> versus the average for the rest of Canada (26%).

## What should be the top 3 priorities for CanCon redefinition?



<sup>8</sup> Comments were made during interviews and at workshops, and mainly from participants in the Greater Toronto Area.

<sup>9</sup> Our literature review also shows that Canadians still spend a considerable amount of time in front of live television, ranging from 17.7 to 22.5 hours per week depending on the regions (Numeris, Sep 2022 to May 2023), which exceeds the [linear viewing averages](#) of G20 countries. These data could suggest that audiences consume most of the content created in Canada in a linear television viewing mode.

<sup>10</sup> One respondent said that the proportions could potentially be higher if the supply of Quebec-made content on platforms was greater. There was also some concern that young people were consuming less French-language content online.

## People-centric policymaking

Many participants, particularly in regions further away from the decision-making centres of the audiovisual industry, called for a people-centric approach to policymaking. In the Halifax foresight workshop on June 26, for example, the idea of a basic income model for audiovisual creators was brought up to underscore the importance of prioritizing individuals and communities over traditional businesses or profit-driven models.

The call to integrate equity, diversity, and inclusion (EDI) principles into policymaking was another recurring theme. Discussions from interviews and foresight workshops highlighted the importance of backing diverse and innovative content creators capable of questioning norms and encouraging collaboration. Some mentioned that mentorship initiatives could help overcome cultural barriers and break down silos<sup>11</sup>, creating a more inclusive and vibrant creative environment. Participants also stressed a strategic focus on intellectual property (IP) ownership to retain ownership within Canada, amplify underrepresented voices, and nurture a diverse and inclusive creative environment.

Others offered a more nuanced position, including groups representing systemically excluded production communities, suggesting that audiovisual policymaking should not carry the entire burden of EDI principles, especially since some issues are already regulated by Canadian law and address larger issues or even Canadian society as a whole.

**“EQUITY, DIVERSITY, INCLUSION, AND BELONGING (EDIB) ARE FUNDAMENTAL ASPECTS OF CANADIAN SOCIETY AS ENSHRINED IN THE CANADIAN CHARTER OF RIGHTS AND FREEDOMS AND HUMAN RIGHTS LEGISLATION ACROSS CANADA. (...) CANADA MUST BE ACCESSIBLE AS A MATTER OF LAW. (...) IT IS NOT A CHOICE. IT IS OUR COLLECTIVE RESPONSIBILITY.”**

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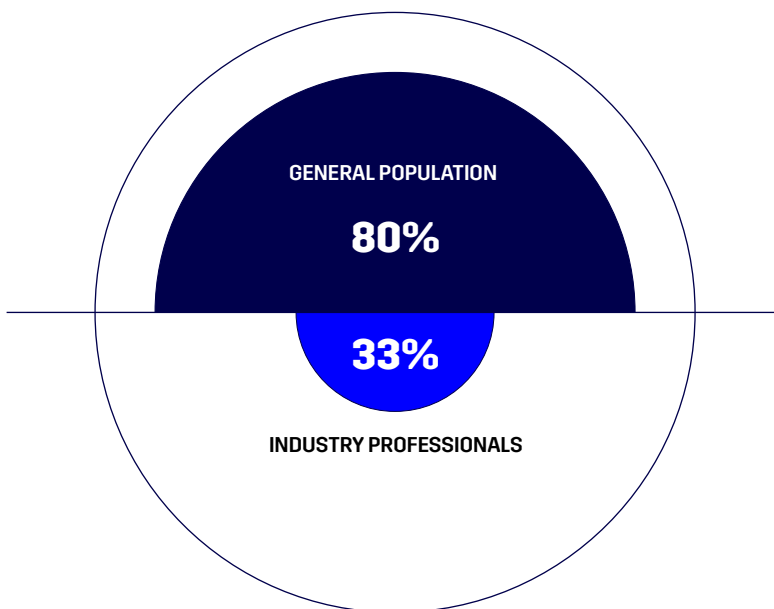
<sup>11</sup> We were told that silos can take various forms in Canada’s audiovisual industry, including geographical silos, language silos, traditional versus digital media silos, and cultural silos.

## Deciphering CanCon policy complexity

The complex nature of Canadian content policy was the subject of many conversations. The legislative and regulatory dimensions of CanCon are difficult to comprehend – not just for the general population, but also for industry professionals most affected by policy changes.

Few participants could fully grasp the nature and complexities of the federal government’s policy interventions in the audiovisual sector. We provided a brief synopsis of the regulatory and public funding aspects of the current CanCon system in the survey conducted in February and March. Despite this, 80% of the general population had little or no understanding of the technical definitions and associated criteria, while 33% of industry respondents reported similar difficulties.

### Reporting a vague or null understanding of CanCon criteria



There was ongoing concern during interviews and in workshops across the country that having a sizeable proportion of industry professionals with limited understanding of the legislative and regulatory foundation of Canada’s broadcasting and audiovisual policies could impact the outcome of government policy. A number of stakeholders well-versed in policy matters repeatedly made the point that comprehensive knowledge is pivotal for effective participation in policy discussions. On this point, opinions differed as to the degree of democratization in policy discussions. Questions were raised by participants about the level of knowledge and understanding required to ensure meaningful participation in the ongoing deliberations on audiovisual policies. This is food for thought around allowances made for those without the knowledge and understanding required for meaningful engagement in the ongoing audiovisual policy deliberations.

## 2. CanCon as a Support Ecosystem

Following comments on CanCon as a Policy Instrument in Section 1, Section 2 deals with participant opinions on the application of policy through government programs. The programs and the organizations that administer them are what we refer to as Canada's film and television support ecosystem. This support ecosystem is shaped in large part – but not exclusively – by a process of content certification based on federal government and CRTC regulatory policies. Since these policies are a critical element of eligibility for programs, funding agencies also play a significant role in how they interpret and apply certification criteria as funding requirements, a subject that was discussed extensively throughout the different phases of the research initiative.

Canada is one of several jurisdictions<sup>12</sup> in the world that use a process of content certification in implementing policy. Certification in our film and television sector is within the purview of the Canadian Radio-television and Telecommunications Commission (CRTC), the Canadian Audio-Visual Certification Office (CAVCO), and Telefilm Canada. The CRTC certifies Canadian content to track and monitor broadcaster obligations. Telefilm Canada and CAVCO both play a role in certifying international treaty co-productions, which are considered Canadian content. CAVCO also manages the certification of Canadian productions with an interest in the Canadian Film or Video Production Tax Credit (CPTC) program.

As we noted in Section 1, many industry professionals were not that familiar with – or were even confused about – the functions and purposes of the various certification processes. In view of the upcoming industry-wide discussions on the CRTC's policy review that will – in part – examine the redefinition of Canadian content, we have provided links with more information about how each body certifies Canadian content (see sidebar).

### LEARN MORE

[CRTC](#)

[CAVCO](#)

[Telefilm Canada](#)

(International treaty coproductions)

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<sup>12</sup> Models used in other countries (like Australia and the UK) were cited as examples on numerous occasions. To learn more, you might refer to Communications MDR's 2022 updated version of her 2015 [international comparative study](#) on systems for evaluating the content of national interest around the world.



## What about certification?

Most producers associated Canadian content certification with being eligible for federal tax credits. This certification process is done by CAVCO, which also administers the Canadian Film or Video Production Tax Credit (CPTC) program. The CAVCO certification process differs slightly from the CRTC's CanCon certification process, which has other criteria.

The CRTC's Canadian content certification plays a specific regulatory role. For Canadian broadcasters licensed by the CRTC, only certified productions count towards meeting their licence obligations (specifically, the percentage of Canadian-made content that a broadcaster is obligated to finance and broadcast). As such, the CRTC has slightly different conditions: it does not require ownership and considers genres that are not CPTC-eligible, like sports, news, etc.

There was also notable misunderstanding about the scope of the certification process itself. CanCon certification can encompass a broad array of factors, including content type, content rights, creative control, where content is created, the amount of money spent, and who can be hired to work on the production – which alone was evaluated on a 10-point scale.<sup>13</sup> On more than one occasion, participants seemed to think that the entire certification process was evaluated on a 10-point scale. Some others suggested, without any prompting, that CanCon could be certified by using a simple scoring system. Others felt that this would be too simplistic and fail to establish parameters needed to reinforce cultural objectives or other facets of Canadian content. See the text bubbles on this page and the next for some participants' thoughts.

**“IT IS TIME TO EMBRACE A NEW AND SIMPLE DEFINITION: A CANADIAN PROGRAM OR MOVIE IS ONE THAT IS MADE BY CANADIANS. IT IS A STORY WRITTEN, PERFORMED, DIRECTED, PHOTOGRAPHED, SET TO MUSIC, EDITED, DESIGNED, LIGHTED AND OTHERWISE CREATED BY CANADIANS.”**

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<sup>13</sup> For more information on the 10-point scale, please refer to the CanCon explainer article, [part 2](#), published by the CMF's *Now & Next*.

**“ARE WE TRYING TO MAKE SURE WE SPEND MONEY IN THE COUNTRY, OR ARE WE TRYING TO DEFINE CONTENT? THE POINT SYSTEM MUDDIES THOSE THINGS.”**

**“I HEAR PEOPLE SAYING ‘OKAY, SERVICE PRODUCTIONS COULD BE CONSIDERED CANADIAN CONTENT BECAUSE THEY EMPLOY CANADIANS,’ BUT THAT’S NOT THE DEFINITION FOR ME. THE CERTIFICATION OF CANADIAN ‘PRODUCTIONS’ MUST BE MAINTAINED, BUT THE CRTC SHOULD ALSO PLAN FOR REQUIREMENTS ON CANADIAN ‘CONTENT’ IN TERMS OF NATIONAL INTEREST PROGRAMMING; THAT NEEDS PROTECTION.”**

While funding applications don’t always require formal certification, certain programs like Telefilm’s Canada Feature Film Fund (CFFF), the majority of CMF programs, and specific provincial/territorial programs use the same criteria as CAVCO or the CRTC to establish their own funding eligibility standards. The overlap between certification for regulatory and tax credit eligibility and those used by funding agencies to assess eligibility has led to considerable confusion about what is and what is not CanCon; some participants even questioned the underlying purpose of it all.

According to participants, one factor adding to the complexity is the lack of alignment between varying program standards using the 10-point scale system<sup>14</sup>. When it comes to creative teams, the CRTC generally requires a minimum of six points, Telefilm at least eight, and the CMF all ten points (with some exceptions in all three cases). Participants had concerns in discussions on the administrative convolutions that result when applying to multiple funding organizations.

From a slightly different angle, some participants spoke out on the potential of implementing robust content criteria (similar to those employed by some funding agencies) for policy-level certification. For these participants, the goal would be to strike a delicate balance between economic and cultural objectives.

This idea generated divergent views. Some individuals do not believe that a new definition should include criteria ensuring identifiably “Canadian” elements, while others suggested that the adoption of this type of “content-centric” criteria in CAVCO and CRTC definitions could benefit cultural policy objectives.

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<sup>14</sup>Note that these criteria – even when different minimums are set for funding access – remain the same and are interpreted in the same way across the various programs. When a production qualifies for all programs, it can receive funding from them all.

At the same time, others pointed out that any content-level criteria (such as criteria for using Canadian stories and themes or cultural identities) would be a huge challenge if it became part of the redefinition of CanCon at the policy level, since it is already difficult today for those working in the field (e.g. broadcasters and funding organizations).

To illustrate that difficulty, some respondents shared that based on their experience, certain projects could potentially be rejected if one was not familiar with specific storytelling approaches tied to particular cultures; for instance, distinctive attributes like pacing, narrative structure, or thematic focus.

All in all, the certification process has played a decisive role, historically and conceptually, in how the industry and its support ecosystem interact with one another. There are persistent misunderstandings due to the overlapping of certification processes for policy purposes and in the use of the same CanCon criteria for funding eligibility. Some of the misunderstandings are amplified by various organizations using similar evaluation tools. Same goes for advocacy groups wishing to see content criteria aligned with funding standards, while others insist on the need for separating content assessment from policy certification.

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#### ACCESS BEYOND CERTIFICATION

The certification process is by no means the sole determining factor for access to federal programs for content producers. For instance, it is not a factor at all in the CMF's Experimental Stream funding for Interactive Digital Media (IDM) content. That is an example where criteria used to identify 'Canadian content' for funding purposes is not tied to audiovisual policies and regulations (because they do not cover IDM productions). IDM producers may need to fulfill certification criteria at the provincial/territorial level to access specific funds without going through a formal certification process.

**“IT IS UP TO THE FUNDERS, BROADCASTERS, AND DISTRIBUTORS TO ENSURE THAT CANADIAN CONTENT BETTER REFLECTS THE EXPERIENCES OF ALL CANADIANS. IT IS NOT APPROPRIATE TO SUGGEST THAT THE CANADIAN CONTENT SYSTEM SHOULD BECOME AN ARBITER OF CONTENT AS THAT PUTS TOO MUCH SUBJECTIVE ANALYSIS INTO THE HANDS OF THE FEDERAL GOVERNMENT.”**

**“I CAN LIST, OFF THE TOP OF MY HEAD, OVER 100 RACIALIZED CREATORS WHO HAVE ACHIEVED SUCCESS ONLINE WITHOUT ANY GOVERNMENT INTERVENTION. SIMILARLY, THERE ARE PROBABLY OVER TEN TRANS CREATORS IN CANADA WHO HAVE FOUND GLOBAL ONLINE SUCCESS AND COMMUNITY. TAKING A SYSTEM THAT HAS FAILED THESE COMMUNITIES FOR THE LAST, WHAT, 60 YEARS, AND TRYING TO ASSIMILATE THEM INTO THAT SYSTEM IS A QUESTIONABLE IDEA, DESPITE THE FACT THAT MUCH OF THEIR CONTENT PERTAINS TO CANADA AND CANADIAN THEMES.”**

## **High-level considerations for a functional definition of CanCon**

One clear consensus emerged from all the exchanges: it is imperative to untangle the CanCon complexities so that all players in the value chain can gain a better understanding of the support ecosystem. While most participants recognize the need to revisit the “regulatory and policy definitions of Canadian content,” they also want to see new thinking around a functional definition, which would mean a complete reassessment of the support ecosystem across all levels to advance economic and cultural priorities, while also having funding bodies align on definitions, criteria, tools, etc.

The prevailing view seems to be that what could be called a “functional” CanCon definition – one that guides the implementation of policy and to a great extent shapes the support ecosystem – requires serious thought and prudent remodeling. Some of the high-level considerations given for a renewed functional definition are listed below.

**First, ingenuity.** In our interviews and workshops, the prevailing sentiment is that while inspiration can be drawn from outside models, we need to build a model that is unique to Canada, one that mirrors the tremendous diversity that defines this land, the people that inhabit it, and the stories our creators are yearning to share and that audiences are eager to embrace.

**Second, vigilance.** We must anticipate unforeseen consequences stemming from any potential modifications to the support ecosystem and address issues as they emerge. Some participants suggested that modelling and analysis are necessary to understand the potential gains and losses stemming from any significant changes to the CanCon definition, and to identify the players that would be impacted positively or negatively.

**Third, balance and equity.** As this year-long initiative unfolded, limitations and disparities within the support ecosystem were highlighted by participants based on their experiences. The challenges encountered by stakeholders from Indigenous and equity-seeking communities were particularly telling – recognizing the significance of Indigenous narratives and

perspectives, ensuring fair opportunities for those with disabilities, and consistently considering the needs of stakeholders in both official languages. Achieving balance and equity is essential for maintaining a beneficial value chain. A frequently cited example is the imbalance between English- and French-language production budgets; another is the need for relationships between creators, producers, broadcasters, distributors, and funders that are mutually rewarding. Numerous participants urged policymakers to carefully determine how any changes to the support ecosystem will impact gatekeeping.

**And finally**, it is important to acknowledge that for many creators and producers, today's support ecosystem is so rigid that they are unable to gain access or they simply choose not to. For example, some voluntarily choose to work on unregulated platforms that sidestep the bureaucracy and offer a more effective means for reaching a broader audience. Notable, many of these creators and producers have experienced systemic barriers and exclusion – see the text bubble on page 20.

## **A GLIMPSE INTO AN IDEAL SUPPORT ECOSYSTEM**

The following points are suggestions and ideas that emerged from foresight workshops in Halifax, Calgary, Toronto, and Montreal, with participants reimagining a future CanCon support ecosystem:

- **Developing new and innovative funding models that encourage storytelling from a diverse array of viewpoints.** It was suggested that some sort of financial support for content creators and producers (i.e. individuals, not just companies) could be crucial in encouraging new voices.
- **Providing enough flexibility to allow the creation of stories that resonate both locally and internationally.** Many emphasized that a Canadian story not inherently tied to our heritage can still be authentic and resonate internationally.
- **Facilitating development of new business and the agility of creators.** One idea was to create a matchmaking service that helped connect creators and funders/businesses.
- **More agility and alignment between policymaking levels and program levels.** There should also be more intersectoral collaboration among all content creators (including from different sectors, such as tech).
- **More collaborative funding models.** Examples included globally funded models to enhance viewership and international awareness of Canadian content, updating current models to make them more transparent and with quicker response times, or audience-driven models<sup>15</sup> that could potentially see the government matching money raised by crowdfunding.
- **Addressing our funding system's fragmented structure**, which can hinder accessibility, especially for certain groups, as they attempt to navigate complex interactions with multiple agencies.

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<sup>15</sup>A frequently cited obstacle to creating content more in line with audience preferences is the inability of producers to access usage data. This difficulty, we were told, is experienced with all online distribution, whether on foreign platforms or owned by Canadian broadcasting companies.

# 3. CanCon as a Product

## CANCON PROFESSIONALS

While not a comprehensive or exhaustive representation of Canada's audiovisual industry, those that participated in the industry population segment of our online survey (n=1556) provide a snapshot of the various roles in the content-production cycle.

- 88% are active, 4.2% are retired, and 7.8% are aspiring industry workers.
  - 61% self-identified as linear content creators
  - 23% as tech or creative crew
  - 16% as digital-first content creators, including interactive digital media (IDM)
  - 15% in other supporting roles
  - 8% with roles in broadcasting and distribution<sup>17</sup>

To learn more about online survey respondent profiles, please see Appendix.

Now that we've covered input on CanCon policy and "functional" definitions, which influence the way government and support agencies interact with the industry, we move to perceptions of CanCon as a Product and the impact this has on how the industry interacts with the market. Insights in this section are based on comments by participants on the rapidly evolving content market, how audiovisual products compete in this market, the economic value of building on Canadian IP, and the growing need for diversification.

In any discussion of Canadian content, industry professionals – especially content creators<sup>16</sup> – invariably weigh in on aspects of CanCon that go beyond policy and functional/funding aspects. They tend to focus on considerations that facilitate their contributions, encompassing the development, production, and distribution of high-quality audiovisual content that resonates with their audiences.

<sup>16</sup> In the survey, audiovisual creators are broken down into two categories: 1. Linear content creators (including producers, directors, writers, actors) and 2. Digital-first content creators (including influencers, developers, Interactive Digital Media producers).

<sup>17</sup> The specific category in the survey is 'Broadcaster and content distributors or BDU (cable, satellite, IPTV), Canadian or foreign online VOD platform, content aggregator, or festival programmer.'

## Branding

During our in-depth interviews and workshops, some participants observed that discussions on “Canadian content” often emphasized policy and financing aspects, inadvertently sidelining critical conversations about the nature of the content itself. For many, there was an apparent gap in the conversation when it came to the distinctive features that set Canadian-made audiovisual products apart from the broader content market.

Several participants shared that terms like *CanCon* or *Canadian content*, understood strictly through a regulatory or functional lens, might impact the way Canadian audiovisual creative output is presented and perceived, both locally and internationally. They felt that thinking in these terms exclusively does not paint a true picture of the range of content crafted and consumed by diverse creators and audiences, potentially undermining the full recognition of a significant portion of the country’s creative landscape.

Participants also felt that if CanCon was not the right label to use in marketing Canadian audiovisual products, other avenues could be explored to develop an effective brand for promoting Canadian content or, as one participant from a foresight workshop put it, “to position Canada as a trusted brand in content creation.” In the same vein, a number of producers spoke of the need for more support to create awareness of Canadian content.

### AUDIOVISUAL PRODUCT

We use the term *audiovisual product* in this section to prevent any possible confusion with the policy and functional definitions in earlier sections, mostly employed by government and support entities, and to respect the individual choices of creators or producers in naming their own content.

“CANCON SHOULD NOT BE A WORD RESERVED FOR CONTENT BEING PRODUCED SOLELY TO MEET A QUOTA.”

### QUESTIONS ABOUT CANCON

Questions frequently raised when discussing a *functional definition* of Canadian-made audiovisual products<sup>18</sup>

- Can content be considered Canadian even if it is not produced by Canadians?
- Can a story remain Canadian simply because it is told from the perspective of someone living in Canada?
- Can a story filmed in another country with non-Canadian creative talent and crew still be considered Canadian if it meets certain criteria?
- Is CanCon an inclusive term, especially considering it is an English term?
- Is CanCon the right label to use for content made by Indigenous creators who may not necessarily identify as Canadian?

<sup>18</sup> These questions arose during an open discussion on CanCon without any implication that a new definition of CanCon needed to address these suggestions or issues.

**“THE SIGNIFICANCE OF THIS CONVERSATION IS PROFOUND: IT’S NOT SOLELY ABOUT REDEFINING A LEGISLATIVE FRAMEWORK OR REVISING STANDARDS; IT ALSO PERTAINS TO HOW THE (CANADIAN) INDUSTRY WILL NAVIGATE A SIGNIFICANT MARKET RESTRUCTURING.”**

## **Competitiveness**

Participants also underscored the need for transparent discussions, tightly linked to the evolving dynamics of the content market, on what sets Canadian audiovisual products apart from content created in other countries.

Without exception, those participating in our various research activities had a clear understanding that they are operating in a content market with a hyper-abundance of products and media experiences. They were also fully aware that their business environment has been significantly transformed from a model that revolved solely around relationships with Canadian broadcasters to one that includes new relationships with global streaming platforms, which many have already established or are seriously exploring.

While feelings range from fear and hope in this new context, all participants were keen to discuss and deliberate the competitiveness of our audiovisual products.

**Four recurring themes emerged** from conversations on this topic, which are briefly outlined below.

### **1. Risk-taking**

Embracing risk is part and parcel of achieving success in the cultural and audiovisual sector. While intellectual properties such as *Murdoch Mysteries*, *PAW Patrol*, and *Toopy and Binoo* (to name a few Canadian examples) amassed significant value, their journey generally began with a bold leap of faith.

Many participants were eager to explore some of the reasons, relating directly to the dynamics of the Canadian industry, that could cause creator to take less risks. Highlights from the discussions included:

- The impact of mounting market competition for broadcasters, including reduced advertising revenue, which might prompt them to mitigate risk in their programming choices.
- The key role broadcasters play as triggers in the financing process, in a sense making them the sole curators of what the market consumes.



- Certification regulations and access to financing specific to Canadian content.


There is no doubt an evolution in how business is done and who is doing it. Rather than pushing for a straightforward increase or decrease in risk, discussions mostly revolved around understanding and managing risk in an ever-changing media landscape. The emergence of new business models, frequently discussed at various phases in this initiative, was among the points highlighted, as were digital-first creators and their entirely novel approaches to crafting and circulating content<sup>19</sup>, and the increasing challenges and opportunities we face now that global platforms have taken their place on stage. For example, many commented on the dramatically increased competition for both funding and audience attention – but also the potential<sup>20</sup> to reach audiences worldwide.

## 2. International appeal and IP ownership

Many participants highlighted the importance of content with international appeal, also pointing out that going global does not mean compromising creativity and perspectives. In the same breath, a very strong consensus emerged that retaining ownership of cultural intellectual property (IP) is crucial for monetization and for benefiting Canadian industry members.

There was broad support for a more systematic IP and retaining value for Canadian-made content. Some participants went so far as to suggest that creators, including writers and directors, retain a share of the IP in conjunction with production companies. On the other hand, some highlighted the challenges of retaining IP, including the complexities of full ownership and, in some cases, the high cost as a deterrent.

During one workshop, a participant emphasized the considerable administrative expenses involved in the long-term management of intellectual property and the specialized skills required. Others pointed out the missed-opportunity costs and their potential impact on foreign investment and international distribution.



**“IT IS REALLY IMPORTANT THAT INTELLECTUAL PROPERTY STAYS IN CANADA. IT IS VITAL. IT IS THE ECONOMIC SIDE TO THIS CONVERSATION.”**

### **THE RIGHT TO OWN AND CONTROL ONE'S CULTURE**

Industry professionals from Indigenous communities voiced other reasons for retaining IP ownership beyond financial ones – cultural, communal, spiritual. These are based on a different conception of intellectual property from that established by Canadian copyright laws. To learn more about Indigenous culture and intellectual property, please refer to the [‘ON-SCREEN PROTOCOLS & PATHWAYS’](#) production guide from the Indigenous Screen Office (ISO).

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<sup>19</sup> The discussion mainly focused on the gap in innovation potential between creators who are bound by the system versus those who operate outside it, and who may therefore enjoy greater agility or creative leeway.

<sup>20</sup> We emphasize the potential since global platforms may still be the gatekeepers here.

**“OWNERSHIP IS IMPORTANT TO MANY, BUT FILMMAKERS ARE KIND OF IN A VERY WEAK POSITION ANYWAY IF THEY WANT THEIR FILMS SEEN AND DISTRIBUTED.”**

There were also warnings that relinquishing intellectual property, whether partially or fully, was sometimes the only bargaining chip for securing needed investments or the commitment of specific business allies, a strategy that could actually put them in conflict with Canadian funding rules.

Industry professionals also noted the need for improved support to generate value in audiovisual content created in languages other than English, since productions of this nature have additional challenges. This partially stems from the dominance of English productions in Canada, the language that, according to our survey, 89% of industry professionals create content in, and which accounts for 81% of their primary income. The gap in required support for producers producing in other languages is growing, even for those producing in Canada’s other official language.

While French-language productions constitute 23% of the Canadian content created by the industrial professionals surveyed, they represent just 15% of their primary income. Languages other than French or English make up 9% of total production and 2% of primary income for producers. Indigenous languages, representing 5% of overall production, generate an even smaller fraction of primary income, just 1% for producers. We can see how these language-related dynamics significantly impact the economic outcome of Canadian content for different professional communities across the country.

**“OUR BUDGETS ARE BETWEEN ONE HALF AND ONE QUARTER OF THE SIZE OF THE BUDGETS FOR ENGLISH-LANGUAGE PRODUCTIONS (...) THE REASON WHY ENGLISH-LANGUAGE PRODUCTIONS HAVE BIGGER BUDGETS IS BECAUSE THEY’RE INTERNATIONAL INVESTMENTS AND BECAUSE THEY’RE EASIER TO SELL IN ENGLISH WITH BETTER QUALITY AND LESS RESISTANCE TO SUBTITLES ON PLATFORMS. FOR EXAMPLE, WE CONSUME SPANISH, DANISH, OR WHATEVER CONTENT MUCH MORE THAN WE USED TO, BUT YOU MUST HAVE THE PRODUCTION QUALITY TO SELL INTERNATIONALLY. SO IT’S CLEAR THAT IF WE WORK WITH SMALLER BUDGETS THAT AREN’T COMPARABLE TO WHAT’S BEING GIVEN ABROAD, WE’LL NEVER BE ABLE TO COMPETE ON THE INTERNATIONAL SCENE, OR EVEN BE ABLE TO BE MORE ATTRACTIVE TO OUR OWN AUDIENCES.”<sup>21</sup>**

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<sup>21</sup> Translated from the original French.

## **EXPLORING DECISION-MAKING DYNAMICS**

Many participants commented on their concerns and hopes for more fairness and balance in how decisions are made and in the value chain for the screen industry, specifically the impact of gatekeeping: who decides and who profits. The impact here is both economic and cultural since it determines the type of content that is produced and consumed. While this report touches briefly on this issue, more detailed discussions on this matter are needed.

In discussions, participants raised the possibility of granting greater decision-making power to producers, in particular to trigger development financing, to determine the amount of tax credit to be invested in production, and to offer greater latitude in the choice of international collaborators for big-budget productions.

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## REACHING OUT TO NEW AUDIENCES

Some participants were concerned that there was not enough discussion about genre diversity, especially in documentaries and children's content. One French-speaking participant shared: "What interests me most in the idea of redefining content is capturing the national interest in children's and youth programming. We urgently need to rebuild our audience there, because our young people, especially teenagers and young adults, are losing interest in locally-made content, and turning towards foreign content, much of it in English."<sup>22</sup>

**"WE WANT TO BE ABLE TO WORK IN A MULTIPLICITY OF BUSINESS MODELS; WE DON'T WANT TO HAVE A SINGLE BUSINESS MODEL IMPOSED ON US, BUT WE CAN CONSIDER THIS FLEXIBILITY TO BE REGULATED."**

## 3. Diversifying content and business models

Participants also mentioned that as we welcome a broader diversity of people and cultures, we must acknowledge more and more diversification in the ways we work and create audiovisual content. The idea that more opportunities are available for creators to present their perspectives to the world was expressed repeatedly, be it in linear-content format, in virtual and augmented reality, as immersive experiences, or on social media. Other participants brought up the need to talk about and better acknowledge the diversification happening at the corporate level to include small, medium, and large organizations, as well as the emerging multinational players and even self-producing creators in our expanding ecosystem.

There was steady emphasis placed on how innovation has become a fundamental pillar of the industry, and how we quickly embrace emerging technologies and alternative models of storytelling. We frequently heard comments on innovation being more critical than ever, given the rapid rate of change in the global mediascape, and how the role innovation plays is an incentive for the industry to further explore the possibilities of Canadian storytelling.

As an extension of the need for staying in step with innovations in technological developments and media consumption habits, many participants felt that the audiovisual sector would benefit by more quickly integrating IDM-minded approaches and solutions. The basic argument we heard is that technologies continually expand the storyteller's toolkit for creating new and exciting cultural products.

No one knows better than IDM producers and creators that artistic and technological innovation go hand in hand. More than a few participants suggested that more could be done to encourage this intersection between storytelling and technology.

**"THERE'S CURRENTLY AN INVESTMENT GAP FOR DIGITAL EXPERIENTIAL CONTENT OR CONTENT NATIVELY DESIGNED FOR DIGITAL PLATFORMS. WE NEED AMBITIOUS PROJECTS THAT DEEPLY RESONATE WITH AUDIENCES, BECOMING ADDICTIVE AND COMPELLING THEM TO RETURN FOR MORE. IT'S ABOUT INVESTING REAL RESOURCES, JUST LIKE WE DO FOR SERIES AND MOVIES. THIS SEEMS TO BE A MISSING LINK IN THE CURRENT OFFERINGS."**

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<sup>22</sup> Translated from the original French.

#### 4. The diversity advantage

Participants commented on how diversity (interpreted here in the broadest sense as all the linguistic, social, and cultural realities found in the country) can provide us with a competitive edge, boosting local and international audiences for Canadian content and differentiating the Canadian market qualitatively (from the US market, for example). This *diversity advantage* sums up a unique facet of Canada – namely, that our diversity sets the groundwork for generating creative products that stand out in an intensely competitive global landscape.

**“BREAKING DOWN BARRIERS FOR SOVEREIGNTY SEEKING AND UNDERREPRESENTED COMMUNITIES WILL BENEFIT THE INDUSTRY AS A WHOLE, AS IT WILL ENSURE THAT CANADIAN CONTENT IS RICHER AND DOES A BETTER JOB OF ADDRESSING THE NEEDS OF DOMESTIC AND GLOBAL AUDIENCES.”**

The quote in the text bubble above references the many studies showing that diversity is an essential driver of economic growth; the participant further suggested that we should never “inappropriately assume that policies that support representation of diversity, culture, and talent on all screens are different from policies that support increased industrial competitiveness and economic benefits.”

**“GIVEN THE COMPLEX MULTICULTURAL LANDSCAPE AND WIDE DIVERSITY THAT EXISTS IN OUR COUNTRY, WE CAN DISTINGUISH OURSELVES THROUGH OUR VOICE, IN FRONT OF AND BEHIND THE CAMERA, IN A WAY THAT DOESN'T EXIST ANYWHERE ELSE IN THE WORLD.”**

## WHAT SETS US APART

When discussing what sets us apart, participants describe a well-structured and effective Canadian audiovisual market that produces better results overall, with four key themes:

- Embracing risk-taking is crucial along with the strategic management of those risks.
- Prioritizing intellectual property (IP) ownership is the prevailing consensus, with certain exceptions.
- Acknowledging and embracing the significance of diversification, including across content formats, corporate structures, and business models.
- Leveraging the competitive advantage that Canada derives from the cultural, linguistic, and social diversity of its audiovisual creators and population.

While some of these observations will not necessarily make it into a formal (re)definition of CanCon, they are good to keep in mind when searching for ways to enhance the creative and innovative potential of Canadian talent. It is all about improving our ability to differentiate and diversify our content against global demand. The global audience metrics for Canadian YouTube creators are a prime example, as participants reminded us on a number of occasions. Creating the right opportunities for content creators does work.

## 4. CanCon as an Expression of Identity

For the fourth and final CanCon facet we examine in this report, we delve into participant insights on identity dynamics. This includes the plurality of personal expressions, as well as the social context and motivations that drive Canadian storytellers. What we essentially heard again and again is that models for financing and promoting national content must encompass both individual and collective identity dynamics to best reflect the diverse influences shaping Canadian narratives today.

We defer again to the caution and care advised by our participants: this report is not the place to analyze personal or collective identities. Prudence and sensitivity were frequent watchwords. Instead, this section covers what participants said about how storytelling and audiovisual content across platforms intersects with the many complex facets of identity.

Identities, like cultures, are always in a state of flux, whether within the self or within the community. Participants held a wide range of perspectives on the many shades of identity that are an integral dimension of Canadian content, especially the storytellers who tend to see identity not only as a part of the story and the way the story is told, but as how we interact with and perceive the world.

The Indigenous perspective is a good example. Throughout this year-long research initiative, participants emphasized how important it was to be sensitive to terminology. For example, the word ‘Canadian’ in any discussion of CanCon is not representative of Indigenous identity. In interviews and workshops, many participants from these communities expressed views similar to the comment in the text bubble on this page.

### THE PLACE OF IDENTITY IN CANCON DISCUSSIONS

Many industry professionals felt that creative, expressive, and social dimensions might not fit into CanCon discussions on regulatory and functional definitions (covered earlier in this report). Others were concerned about culture and identity expressions in any CanCon conversation because of differing views on the role of regulatory tools in cultural preservation; others hoped that rules implemented thanks to the *Online Streaming Act* will better reflect the pluralities of Canadian identity.

**“INDIGENOUS CONTENT CREATION SHOULD BE TREATED SEPARATELY FROM CANCON BECAUSE MANY INDIGENOUS PEOPLE DON’T EVEN CONSIDER THEMSELVES CANADIAN. WE SHOULD PUT MORE CONTROL ON INDIGENOUS PRODUCERS AND BROADCASTERS AND DEVELOP AN ISO DIGITAL SCREEN OFFICE<sup>23</sup> AS WELL. WE NEED TO BE GIVEN THE MEANS TO ASSERT THE KIND OF SOVEREIGNTY THAT WE NEED WITH RESPECT TO OUR OWN CULTURAL CONTENT.”**

<sup>23</sup> The Indigenous Screen office already deals with digital media production. This comment alluded to setting up a dedicated Indigenous-led bureau to manage digital creativity.

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## CLOSED CAPTIONING

Under the *Telecommunications Act*, captioning is mandatory for video programming distributors, including television broadcast stations and multichannel video programming distributors like cable, satellite, and television service providers. In 2007, the CRTC introduced a new policy (Public Notice 2007-54) stipulating that all Canadian television broadcasters must caption 100% of their programs throughout the broadcast day, excluding advertising and promos. As of September 1, 2014, all advertising material, sponsorship messages, and promos require close-captioning before broadcast [Read more.](#)

**“I FEEL REPRESENTED EVERY DAY. I CONSUME QUEBEC CONTENT CONTINUALLY ON A DAILY BASIS WHETHER IT’S FILMS OR ON TV (...) FOR ME, IT’S WHAT MAKES IT REAL, SOMETHING I CAN FEEL BECAUSE THEY ARE PRODUCTIONS THAT ARE MADE HERE WITH TALENT FROM HERE, WITH PRODUCERS FROM HERE, CREATORS FROM HERE. SO I CAN IDENTIFY COMPLETELY.”<sup>24</sup>**

## Canada: a plurality of expressions

Throughout the consultation, participants addressed questions of identity mainly from the angle of representation. These often touched on the dual aspect of seeing and being seen, embracing both storytellers and audiences, something well understood within the industry in terms of self-expression, self-identification on screen, and mutual recognition by others. This representation is crucial because the more content resonates with our identity the more it enhances our sense of belonging and community, broadening the concept of EDIB: equity, diversity, inclusion, and belonging.

Some self-identified Black, racialized, and disabled participants shared how they often turned to American content because they saw so little of themselves reflected in Canadian content. A deaf producer turned to American content as well because a lot of Canadian content at home was not accessible – there was no sign-language interpretation or mandatory closed captioning of television programming in Canada until the mid-1990s (see sidebar).

Throughout this exploration of representation, we heard many comments on how significant it was for participants to discover narratives that resonated with their distinct experiences, and they often felt that only creators with the same direct personal experiences were best positioned to convey them. In workshops and interviews, French-language production in Quebec was frequently given as an example.

In terms of linguistic representation, many were concerned about the decline of the French language, not only in Quebec but the rest of Canada, especially among younger francophones. To them, it was very important that rules are in place to ensure Canadian content includes original French content. This was a concern shared by content creators, producers, and broadcasters during the interviews.

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<sup>24</sup> Translated from the original French.



Our research initiative also brought to light unintended consequences, where guidelines designed to benefit one group can inadvertently create barriers for another. A specific example came from a deaf producer in Quebec, who because of provincial regulations, had to master French, LSQ, ASL<sup>25</sup>, and English. The participant suggested a solution to this unintended consequence would be to have the film and television industry finance translating LSQ<sup>26</sup> into English.

Linguistic concerns that arose during interviews or workshops emphasized the close connection between identity and cultural consumption for participants, not only as a matter of representation, but as a matter of “survival/existence, period” according to one interviewee.

This conversation on language insecurity as it relates to the preservation of one’s language parallels the challenges faced by other underrepresented groups. The absence of self-representation on screen or in content reflecting one’s identity can also translate into a fear of the future as indicated in the text bubble below.

**“THERE’S SOMETHING ELSE THAT CONCERNS US ALL, AND WE NEED TO TALK ABOUT THAT SOMETHING ELSE: WHAT BELONGS TO US? OUR HISTORY, OUR RELATIONSHIP TO EACH OTHER, THE ROLE OF OUR INSTITUTIONS, OUR DESIRE TO TELL OUR OWN STORIES ... IF WE DON’T HAVE A WAY OF EXPRESSING THIS THROUGH BOTH DOCUMENTARY CONTENT AND FICTION (...) THEN WE’LL FORGET WHO WE ARE.”**

<sup>25</sup> LSQ (Langage des signes du Québec); ASL (American Sign Language).

<sup>26</sup> It was noted that the Canadian Council for the Arts and the CMF’s diverse language program recognize this type of expense provided there’s a license for broadcasting the translated version (in the latter).

<sup>27</sup> Use of quote authorized by participant.

<sup>28</sup> Translated from the original French.

## REPRESENTATION

Groups like the Black Screen Office (BSO) have conducted comprehensive research on issues of fair representation. The BSO’s [Being Counted](#) 2022 survey showed that Canadian audiences are dissatisfied with the level of representation on Canadian screens and expect more. And when they are not able to find it, as one BSO representative<sup>27</sup> put it, “they might look outside the country or outside of traditional platforms.”

**“THERE’S A LOT OF TALK ABOUT LANGUAGE INSECURITY IN FRENCH-SPEAKING COMMUNITIES. WE WANT TO MAINTAIN THE PRIDE WE HAVE IN OUR ABILITY TO SPEAK FRENCH.”<sup>28</sup>**

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## APPROPRIATE LANGUAGE

Are we using appropriate language? A number of Indigenous and racialized participants were concerned that terms like *equity-seeking*, *sovereignty-seeking*, and *equity-deserving* can sometimes be perceived as negatively “minoritizing” underrepresented groups and communities.

**“I HAVEN’T WORKED WITH A SINGLE PRODUCER OF COLOUR IN MY CAREER.”**

**“I REALLY HAD TO FIGHT VERY HARD FOR MY STORYTELLING IDEAS TO BE ACCEPTED AND TO BE PART OF THE BROADER CANADIAN NARRATIVE.”**

**“ULTIMATELY, THE AIM IS TO MOVE PEOPLE IN A VARIETY OF WAYS, CONFRONTING THEM WITH DIFFERENT POINTS OF VIEW, AND MAKING THEM REFLECT ON THEIR OWN EXISTENCE.”<sup>29</sup>**

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<sup>29</sup> Translated from the original French.

## Identity impacts on opportunity

We were also told that systemic exclusion has prevented many from entering the industry, from having a seat at the table, and from telling their stories. Even those who do manage to overcome barriers and enter the industry say they are often pigeonholed and devalued.

Systemic barriers impede on the ability of creators to fully express their identity. Whenever a creator is forced (by meeting criteria, standards, or for some other reason) to focus on a particular layer of their identity, the quality of the content suffers since the other layers that make up their identity are sidelined. Participants told us that this reduction process can happen at many points in the process, beginning at the funding stage. A concrete example of this is the systematic allocation of some creators to “Diversity or Indigenous funds,” as described by a producer who felt confined to secure funding solely from programs for Indigenous projects, reinforcing the idea that they need to “fit in the fixed framework” the industry has established for their community. Situations like this occur all the way through to the distribution stage so that even when ‘diversity films’ may gain exposure on the festival circuit, they do not see the same pick up via theatrical release or television broadcast.

As we conclude this section on individual and social perspectives, we must keep the core objective of our year-long research initiative top of mind. While discussions have provided insights into more personal and communal viewpoints, the crux of this effort to shed light on all dimensions of the concept of Canadian content, including as a conduit for expressing our national identity. In this respect, industry participants said they cared a great deal about Canadian content. They see it as a part of what motivates them to work in the industry, a part of their mission of safeguarding our cultures and communities. Participants from different backgrounds and with different experiences reaffirmed their goal of building bridges, with one advocate articulating the hope that “Canadian content [grows] richer and does a better job of addressing the needs of domestic and global audiences.”

## **PART 3**

# **KEY INSIGHTS AND VISIONS OF THE FUTURES**

## **The takeaways**

The contributions and discussions from participants (both general population and industry professionals) across our research initiative greatly helped to peel back the many layers that make up Canadian content. Insights stemming mainly from industry professionals informed our approach to understanding Canadian content through four distinct conceptual angles. The four angles provide a framework for facilitating CanCon discussions and make it easier to ground a term that has evolved over the years, and means different things to different individuals.

- 1. CanCon as a Policy Instrument**  
Governmental regulations and their interpretation
- 2. CanCon as a Support Ecosystem**  
Funding agencies for accessing support programs for audiovisual projects
- 3. CanCon as a Product**  
Production and marketing of audiovisual content domestically and internationally
- 4. CanCon as an Expression of Identity**  
The representation of self and communities in content

Based on what you said, the contraction/phrase “CanCon” seems to be associated more generally with the regulatory and functional definitions covered in the CanCon as a Policy Instrument and CanCon as a Support Ecosystem sections of this report; in other words, how the industry interacts with government and support agencies through the lens of cultural and economic policy.

‘Canadian content’ seems to provide the most fitting description of how the industry engages with the market and society at large as outlined in the CanCon as a Product section of this report. In the CanCon as an Expression of Identity section we learned that both CanCon and Canadian content are considered inadequate and do not encompass the full scope of the diverse realities, experiences, and social identities that are significant for Canada’s audiovisual creators and for audiences looking for better representation.

We also learned that exploring CanCon and Canadian content from these four distinct conceptual angles often leads to more questions. In a context of globalized technological, economic, and audience transformations, where is the business of creating cultural products in Canada heading? What does Canadian content really mean in light of the cultural and social pluralities that make up the Canadian experience today? And what role will CanCon as a Policy Instrument and CanCon as a Support Ecosystem play in addressing these and other questions?

This report was designed to provide useful insights based on what industry professionals and the general population said. We hope these insights will lead to deeper conversations on what the futures hold.

### **Key takeaways and consensus points**

1. The labels CanCon and Canadian content may not be adequate or well-adapted for encompassing all the dimensions uncovered in this multi-layered concept, as indicated by persistent misunderstandings.
2. Talent must be nurtured. The policy and support ecosystem needs to help develop and retain Canada's extensive range of creative talent.
3. The support ecosystem must be better aligned with programs and organizations for intersectoral collaborations. This transformation should be guided by simplicity and flexibility to reduce administrative burdens and to streamline processes.
4. Intellectual property is paramount. Canadian ownership of IP must be considered as a key component in policy and support programs.
5. Invest in people and their companies. Support for building capacity is essential for both individuals (including mentorship and training) and creative companies (facilitating tax credit reinvestment for television producers, for example).
6. Canada's future competitiveness depends on engaging the full spectrum of our creative forces, in all their pluralities and diversity, from one end of the value chain to the other.
7. Future models for financing and promoting national content must take individual and collective identity dynamics into account.
8. Indigenous communities may prefer to maintain a definition of Indigenous content distinct from Canadian content.

# Visions of the Futures

As part of our research initiative, a series of online and in-person foresight workshops, informed by key findings from our online survey, interviews, and written submissions, were held with industry professionals across the country in May and June 2023. Participants were asked to share their thoughts and concerns on possible futures for Canada's audiovisual industry.

This collective representation of hope and pragmatism bodes well for the future of the Canadian audiovisual industry. We hope the key points below inspire future discussions and lead to an even more collaborative spirit within the industry.

1. **Global Reach:** Industry professionals discussed the expanding reach of Canadian content beyond borders, aspiring to global resonance while maintaining a distinct identity, embracing diversity, and experimenting with different content formats.
2. **Cultural Identity:** A focus on Canadian culture emerged that led to connections with other cultures and generational differentiations. True diversity and authentic representation were emphasized, as well as moving from being just 'Hollywood North' to establishing a unique Canada-based industry identity.
3. **More Collaboration:** For many, the Canadian industry is not big enough to be highly competitive. Our ability to cope with international market pressures will come from our ability to generate maximum fluidity and collaboration within the industry and between sectors (digital creativity and music as examples).
4. **Innovative Funding:** New funding models were discussed to encourage creative risk-taking, including globally funded options for wider viewership and greater recognition. Transparency in funding processes was stressed as being more beneficial for the creative community.
5. **Ownership Focus:** Emphasis was placed on preserving the value of Canadian creative work within domestically owned companies to prevent the perception that Canada's audiovisual industry is solely a service for foreign producers.
6. **Intellectual Property and Tech:** Participants highlighted the potential for a new era and understanding of intellectual property in the industry's future, with acknowledgment of the role artificial intelligence might play.
7. **Content Flexibility:** Industry professionals mentioned the need for flexibility in content creation for catering to international markets and niche genres. This would require updated agreements and eased requirements for creators navigating global markets.

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## FORESIGHT METHODOLOGIES FOR INFORMED DECISION-MAKING

The foresight methods were developed to improve our ability to see what will or might happen. Our foresight workshops used these methods to help participants imagine the potential for Canadian content. The idea is not to predict the future but expand the possibilities for contemplating what lies ahead. Scenario planning is one of the foresight methods. As Amy Webb [aptly puts it](#): "Why bother with long-range planning when there's so much uncertainty now? Because scenario planning isn't about future decisions that will need to be made, but about the future of the decisions we make today."

8. **Thinking Differently:** Mentorship programs were mentioned as a way of supporting emerging talent and promoting collaboration, not simply with the idea of replicating known practices but in challenging norms and encouraging interdisciplinary discussions. Some suggested new types of storytelling, digital creative tools, and emerging business models as ways of evolving audiovisual products to meet the preferences of new audiences.
9. **Audience Engagement:** Conversations revolved around engaging audiences through interactive feedback systems and transparent algorithms, along with business partners that give producers and creators access to usage data to ensure that audience-driven strategies are optimal. Among topics that producers would like to better address, you discussed such things as storytelling quality, promoting socio-economic change, and sustainable practices.

As a final note, we also want to highlight a recurring call made by several industry members regarding the importance of “coming together” and uniting voices to articulate a collective vision for the industry’s future. This sentiment resonates with a maxim invoked during at least one public intervention by Vicky Eatrides, CRTC’s Chairperson and Chief Executive Officer, who stated, “if you want to go far, go together; if you want to go fast, go alone.” In this regard, many participants in our foresight workshops suggested these key points to foster a sense of unity in pursuing the audiovisual industry’s shared visions and goals:

- Address apprehensions related to systemic change.
- Embrace risk with purpose and determination.
- Reestablish a place for individual and collective voices within an industry currently dominated by corporate giants and complex systems.

**APPENDIX**  
**METHODOLOGY**  
**INFORMATION**

# APPENDIX

# METHODOLOGY

# INFORMATION

This industry research initiative was conducted by La Société des déjans and its associated research partners. The year-long project was deployed in three phases, each counting a variety of data-collection activities that are detailed below. The three phases are not designed to stand alone: each data stream feeds and complements the other.





## PHASE 1: Ethnographic interviews and online survey

### A. TEAM

Lead researcher: Catalina Briceño, professor, UQAM and partner, La Société des demains

Ethnographic researchers: Méralie Murray-Hall and Amélie Ward, Humain Humain

Online surveys: MBA Recherche, member of the Canadian Research and Insights Council (CRIC), the European Society for Opinion and Market Research (ESOMAR), and the Insights Association

### B. INTERVIEWS

#### About the ethnographic approach

Specializing in ethnography, the mission of the anthropologist revolves around an understanding of how individuals perceive their position within the world and their significance within the framework of their surroundings. Employing an open-data collection technique, the strategy involves giving participants the autonomy to voluntarily disclose their encounters based on their personal knowledge and their interpretation, according to Luckerhoff and Guillemette (2012).

The approach puts an emphasis on qualitative methodology, like ethnography, and entails an investigation into customs and societies, without seeking statistical averages or the portrayal of a select sample. The focal point is on identifying individuals capable of articulating their needs and their lived episodes. The preservation of confidentiality is a pivotal element integral to the proposed ethnographic dialogues (Humain Humain, 2023).

#### Sampling method, sample size and composition

For this project, the research team mainly mobilizes the Snowball sampling method<sup>1</sup>, also referred to as the chain-referral sampling method and data collection often employed in qualitative research, particularly in the fields of sociology, anthropology, and other social sciences. It's a non-probabilistic sampling technique that involves identifying initial subjects or participants who fit the criteria of the study and then using their network and connections to gradually expand the sample size.

The Snowball effect is often selected when the research involves topics where the participants are part of close-knit communities, in subcultures, or have experiences that might not be easily accessible through random sampling methods. While it provides advantages in terms of reaching a specific population, there are potential biases and limitations that can arise due to the non-random nature of the sampling process.

A conscious effort was made to prevent diversity bias. Recruitment began with lists of names from CMF consultation records over the years. Participant selection was based on their industry roles: linear audiovisual creators (producers, directors, writers, actors), digital-first content creators (influencers, developers, IDM producers), technical and creative crew members (camera operators, caterers, costume designers, programmers, editors), support activity workers

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<sup>1</sup> One of the many definitions and descriptions of that research method can be found [here](#).

(unions, guilds, associations, accounting, insurance, banking, municipal film commissions), expert observers (scholars, researchers, consultants, journalists, students), broadcasters, content distributors (cable, satellite, IPTV), Canadian/foreign online VOD platforms, content aggregators, festival programmers, funding stakeholders (public/private funds), policymakers, and regulatory authorities.

There were thirty-three interviews with overlapping roles reflecting the convergence of interviewees. The researcher strived for diversity in representation as part of the interviewees. This included gender, language (Francophones and Anglophones), regions across Canada, urban and non-urban, Indigenous, Black and racialized, 2SLGBTQ+ and disabled persons. Intersectionality was also considered.

### **Questionnaire structure**

The participants took part in a semi-structured interview approach, with each interview lasting approximately forty-five minutes to an hour. Interviews were recorded in digital audio and video format to facilitate transcription and data analysis.

Interview questions revolved around several key themes, encompassing identity, perception, production, and consumption of content created in Canada, as well as participant aspirations for the future. Exploring their motivations for engaging in the industry was the first question. After this, the goal was to uncover obstacles and challenges that contribute to the complex dynamics of producing qualified Canadian content. Finally we explored their experiences and perceptions of the CanCon label.

### **Data analysis**

The process begins with systematically organizing raw data, charting conversational fragments with LIGRE software. We then move on to delineating ethnographic motifs and scrutinizing commonalities and disparities within the interviewee answers. In an additional step we carry out a transversal examination of the narratives reported, essentially identifying intersections within the diverse participant discussions. We also cross-analyze the qualitative data with other relevant sources, including industry literature and quantitative information provided by the online survey.

## C. ONLINE SURVEY

The online survey was the quantitative part of our research designed to complement, enrich the interviews, and confirm (or not) some observations made in the field. To this end, the survey questions were informed by the preliminarily ethnographic interviews. This was also an opportunity to poll Canadian public opinion (that is the general population) by identifying convergences and divergences between the perceptions of the general population and those of the industry professionals.

Data collection took place from February 27 to March 31, 2023.

### Segments:

- Population sample = Canadians eighteen years and older **who do not work** in the audiovisual industry
- Industry sample = Currently active workers in the audiovisual industry, those previously employed in the industry, or those aspiring to work in the industry

### Sample sources:

- Online survey for Population through a combination of MBAweb and Dynata panels
- Online survey for Industry through CMF newsletters, email invitations, website, industry organizations or those willing to share the survey, and those identified through the MBAweb and Dynata panels

### Quotas:

- Population sample = Quotas on region, gender, and age based on national distribution
- Industry sample = No quotas since the distribution of the industry population is unknown

### Weighting:

- Population sample = Weighting on region, gender, and age based on national distribution
- Industry sample = No weighting since the distribution of the industry population is unknown

### n :

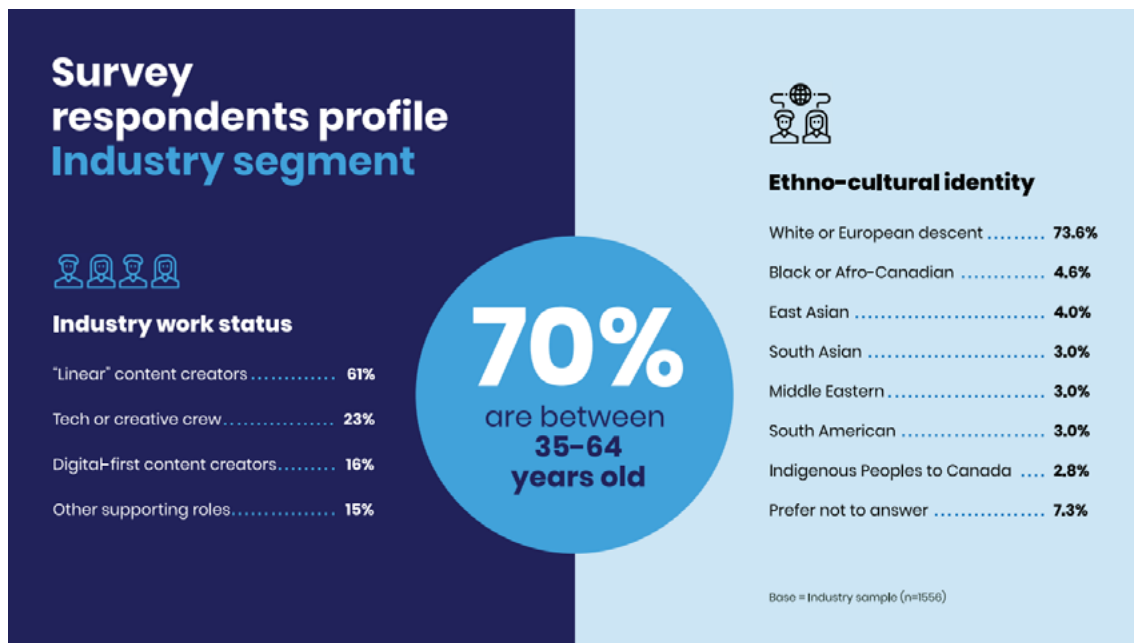
- Population sample = 1001 completed questionnaires after quality control
- Industry sample = 1556 completed questionnaires after quality control

### Industry respondent profile (n=1556):

- In total, there were 1556 industry participants. Out of these, 743 self-identified as male (47.8%) while 737 self-identified as female (47.4%). Nonbinary or gender diverse individuals totaled 36 participants (2.3%), and 2.6% respectively, and 40 participants chose not to answer.

- 70% of survey respondents fall within the age range of 34-64 years.
- Slightly more than 25% of industry respondents indicated their origins from approximately 10 different ethnic backgrounds – see breakdown in visual below.
- 23% mentioned producing content in French, while 20% stated they reside in Quebec.
- Regional breakdown for Industry sample:

TOTAL	Maritimes	Quebec	Ontario	Prairies	British Columbia	Yukon / Northwest Territories / Nunavut
1556	63	312	737	142	290	12
	4%	20%	47%	9%	19%	1%



## D. WRITTEN SUBMISSIONS

Another method of collecting data was through voluntary written submissions from those who wished to write their perspectives without the constraint of answering specific questions. Stakeholders were informed in all communications relating to the online survey and via a series of online articles of this alternative way of expressing their views. Fourteen organizations, some of them associations representing hundreds of members, submitted briefs.

## PHASE 2: Foresight workshops

### A. TEAM

La Société des demains partners Catherine Mathys (lead facilitator) and Catalina Briceño (lead researcher)

Assistant facilitators: Laura Beeston, Catalina Briceño, and Francis Gosselin

Note takers:

- Montréal: Fanny Tan
- Halifax: Jared Morrow
- Toronto: Amber Dowling
- Calgary: Catalina Briceño

Coordinators and research assistants: Marie Lods and Marianne Grenier

### B. ATTENDANCE

Because of the high level of engagement required, workshops could accommodate only a relatively limited number of participants. Online workshops were open to anyone in Canada with a limit of 40 participants per workshop. Live streaming was offered so others could still attend remotely. In total, 237 signed on for the virtual workshops with 109 participating directly and 128 as observers.

In-person workshops were held in small invitation-only groups of participants committed to a full morning or full afternoon of intensive co-creation work.

Date	Workshop location	Number subscribing	Number participating
May 30, 2023	French Online	n/a	57
June 2, 2023	English Online	n/a	132
June 5, 2023	English Online	n/a	48
June 16, 2023	Calgary – in person	20	11
June 23, 2023	Toronto – in person	28	17
June 26, 2023	Halifax – in person	15	13
June 27, 2023	Montréal – in person	14	11

## **What is foresight?**

Foresight is the ability to think and perceive the future in a systematic way to inform actions and improve decision-making starting from the present. Foresight methods do not aim to predict the future. The goal is to broaden the range of possibilities and to think more creatively about what might happen in the years to come. By relying on collective intelligence, we can determine the outlines of the futures we desire and begin to chart the paths that will help us achieve them.

Foresight provides a mindset, a way of contemplating uncertainty. Rather than seeing the situation as too complex or uncertain, it presents the perfect opportunity to explore alternatives. What if things were different? Would they be better or worse? Questions like these were explored through various scenarios in our in-person foresight workshops.

Foresight scenarios are descriptions of plausible alternative futures. As a planning tool, scenarios help organizations shape and test potential strategies. In our four foresight workshops – virtual and in-person – participants were given a glimpse of different methods for imagining what the future might hold for Canadian content.

## **C. VIRTUAL WORKSHOP STRUCTURE**

Two-hour online workshops were held in English (June 2 and June 5) and French (May 30). The webinars were designed to introduce participants to foresight methods and to narrow down key findings from the ethnography and survey phases of our year-long Canadian content research initiative. These key findings, as defined by the stakeholders, were the data used to actually structure the workshops.

The online workshops were hosted on the Zoom platform. One moderator and one note-taker was assigned to each subgroup.

### **Agenda**

Introduction: Duration, purpose, and format of the webinar

What is foresight?

### **Activity 1 in subgroup**

Series of challenges

A list of insights from the ethnography phase were presented. Within each group, participants identified the issues they wanted to work on.

### **Activity 2 in subgroup**

Reversal of assumptions

Starting from the issues identified in Activity 1, flip them into their opposite. The goal here is to stimulate creative thinking. A very effective method for moving past blind spots and triggering new ideas.

### Activity 3

How could it be different in the future?

Which of the possible flipped futures would participants most want to wake up to? Why? Discussion about what could be different and perhaps better in this different future.

### Activity 4 in group

One person from each of the three groups presents positive results from Activity 3 to the rest of the group.

## D. IN-PERSON WORKSHOPS

In-person workshops were the second and final step in the foresight workshop. They were structured on key findings from both online seminars (English and French).

The three-hour workshops introduced participants to scenario building and road-mapping the route to future changes in the screen industries.

Workshop 1 in Calgary	in English	June 16 from 9:00 am to 12 noon
Workshop 2 in Toronto	in English	June 23 from 9:00 am to 12 noon
Workshop 3 in Halifax	in English	June 26 from 9:00 am to 12 noon
Workshop 4 in Montreal	in French	June 27 from 9:00 am to 12 noon

### Agenda

Introduction: Duration, purpose, and format of the workshop

Introductory remarks from Valerie Creighton<sup>2</sup>, President & CEO of the Canada Media Fund

What is foresight?

What is a scenario and why is it a useful tool?

### Activity 1 for individuals

Learning to time travel – warm-up activity to stretch our imagination

Mental time travel or episodic future thinking stretches the imagination and helps to prepare for change. Prompt for this exercise: “You are in 2033, this is CanCon...” (or something else)

### Activity 2 in subgroups

Tables given 2 x 2 matrix on discussion themes prioritized during online workshops. Each subgroup must generate four short one-line scenarios in each quadrant.

### Activity 3 in subgroups

Following previous exercise, participants defined a preferable future in one scenario. A preferable scenario is built on feedback and negotiation. Ultimately, it describes what the group wants to see happen. Prompted by future newspaper headline.

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<sup>2</sup> It is important to note that Valerie Creighton left the room after delivering her introductory notes at each workshop.

#### **Activity 4 in subgroups**

Futures wheel analysis

Participants then explored different outcomes by analyzing first-, second-, and third-order impact from ideas previously generated. Opportunity to brainstorm the direct and indirect implications for every idea. Modify the preferable scenario if needed.

#### **Activity 5 in subgroups**

Backcasting – How did we get to the preferred future?

Identify people, movements, and efforts already working in this direction

Identify people, movements, and efforts that hinder this direction

Imagine what does not yet exist but would accelerate progress towards the preferred scenario

#### **Activity 6 for everyone**

Share all scenarios and backcasting strategies.

Chosen spokesperson for each table reads their headline of the future and backcasting template.







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