2021

ANNUAL TRENDS REPORT IN THE AUDIOVISUAL INDUSTRY

Pause and Rethink

CANADA MEDIA FUND

CMF by the numbers

CANADA MEDIA FUND

$3.6B

Amount CMF has invested in Canadian television and digital media production since 2010–2011

48%

Percentage of female producers working on CMF-funded television projects

$235M

CMF funding to 892 video games since 2010 – 2011

27,000

Hours of television produced thanks to CMF funding since 2010–2011

$13B

Production activity triggered by CMF funding since 2010–2011

48%

Audiences who had an increased perception of Canadian content as a result of the MADE | NOUS campaign

25

Number of languages CMF funds content in, including Arabic, Cantonese, Cree, Dakota, English, Farsi, French, Halkomelem, Hindi, Innu, Inuktitut, Italian, Maliseet, Mandarin, Mi'kmaq, Mohawk, Northern Tutchone, Ojibway, Oji-Cree, Punjabi, Russian, Spanish, Tagalog, Ukrainian and Urdu

615

Number of projects in Indigenous languages funded by CMF since 2010–2011

23M

Views from outside Canada of CMF's Encore+ YouTube channel

Total Film and Television Production in Canada in 2018/19

180,900

Full-time equivalent jobs

$12.8 B

Gross domestic product (GDP)

+2.4%

Increase over the previous year

+5.2%

Increase over the previous year

"There's a crack in everything. That's how the light gets in."

LEONARD COHEN

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> The editorial team has made the best effort to adopt an inclusive writing style, reflecting the terminology people and communities in question would like to use. The writing style was in large part the result of ongoing consultations led by the CMF with the help of racialized groups and other underrepresented communities.

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The 2021 Canada Media Fund Trend Report is unlike any of the eight reports we have previously published. Within the unusual context of a global pandemic, it's the result of a one-year reflection in a year when everything had to be questioned.

An opportunity to rethink our way of doing things, we headed back to the drawing board.

We decided to slow down. Listen more deeply. Use the chaos to review, reimagine and rebuild.

Our goal at the CMF was to prepare a more inclusive and compassionate trend report, one that was more open to varying points of view.

Of course, it was a priority to create discussions about systemic racism and other issues in our business that are obstacles for the Black, Indigenous and People of Colour community. And it was essential we get fresh perspectives and look way beyond our usual circles for insight.

Over the past year, we examined, discussed and analyzed industry news at length with the help of experts and screen-based workers with a wide array of complementary knowledge and experiences. Writers and illustrators from across Canada looked for solutions and inspiration to provide perspective for those in the audiovisual industry.

This report is the result of hundreds of hours of monitoring, analysis, consultation and many, many edits. It does not claim to know the answers but demands that we take a hard look at the questions that arose last year. It *is* filled with resilience, determination and hope.

As complex as some of our industry's issues may be, we are committed to better understand them.

We hope this report will be a guide into uncharted territory, inspire our industry to tell better stories, see the light in the cracks exposed by a pandemic and give you the strength to start again… differently.

CATHERINE MATHYS
Director, Industry and Market Trends

CANADA MEDIA FUND

Audiences today

Disrupted viewing

Working through it

Settling into the COVID-19 pandemic

2020 changed everything. Our daily life was upended and we adapted our media consumption habits, especially in light of the lockdown and working from home. Our routines were turned around. And we spent less time travelling and more time in front of our screens.

We worked from home and homeschooled. Could this explain why Baby Shark was the most viewed video on YouTube last year? And, given that we are sharing our devices, how will social and virtual co-viewing habits born from a pandemic affect our consumption over time?

We made bread and wore sweatpants. We looked for ways to overcome the absence of loved ones. Responding to the demands of physical and social distancing, we watched films and TV series, played video games “together” (yet apart) and created virtual media experiences, memorable moments and connections that replaced in-real-life ones.

Content became a trusty coronavirus companion, with Canadians consuming everything from comedy to dramas, games and documentaries. Will we continue to subscribe to streaming services and seek out as much content once COVID-19 is under control and it is safe to be social again?

It’s tough to predict. What’s become clear, however, is that human beings sought to understand what was happening around the world and at home. We also sought to understand one another through the power of media and audiovisual excellence.

And undoubtedly, one of the great legacies of this global shock is that we increasingly became digital audiences — and perhaps screen-based media will never be the same.

CATHERINE MATHYS
Director, Industry and Market Trends

CANADA
MEDIA FUND

For better and for worse, 2020 has meant adjusting to change, working from home, skipping town, going virtual and rethinking childcare and schooling.

Words

OUMAR SALIFOU

Illustration

NANDITA RATAN

With files from

LAURA BEESTON

Karen Unland was recording a podcast from her office when the pandemic and plenty of uncertainty hit.

Before everything shut down, "I [didn't even] get to think about it because I was still trying to get a lot of stuff done on very specific deadlines," the co-founder of Taproot Publishing, which operates Taproot Edmonton, recalled.

Suddenly, she had to contend with the fact that her kids would be home — so school would have to happen there, too.

Covid-19 and families

"Pandemic parenting" describes the challenges of raising and homeschooling kids, working online and managing anxiety about potential illness. It is a feat Canadian parents have faced for a year now.

"It's very hard for me to just work," Unland admitted. "It's just a split focus."

She's not alone: According to a Statistics Canada survey, 74% of parents reported feeling very or extremely concerned with balancing child care, schooling and work.

For Unland, juggling a media startup schedule and family commitments came down to "the privilege of having an older child who is willing to help my younger child go through school," she said. "I have in-house tutoring."

"If I had to drag my son through grade 10, I would be in a much different position."

Luckily, there are other resources to help structure working from home (WFH) out there. The Public Health Agency of Canada administers a parent support program called Nobody's Perfect, implemented across the country by local agencies.

And the Canadian Psychological Association developed a factsheet for managing home environments, underlining the importance of a routine, scheduling breaks and setting solid boundaries between individuals and their families or colleagues.

For David Baeta, executive producer at Moi & Dave in Toronto, continuing production work while raising three kids aged 10, 8 and 2 meant sharing parental duties, using a calendar, as well as "video conference meetings [with] the baby on my lap."

Everyone's adapted. "It wasn't easy but over time I learned to roll with the punches," he said. "Find a way to ride the wave and have a schedule that is suitable to the workload and balancing family life."

Baeta took email notifications off his cell phone and left it in another room when at the dinner table. “Having a dedicated space [where] you can retreat to *physically* in your house also helps,” he advised. “I go down to the basement. When I come up, work is behind me… it also sends a signal to the kids.”

Looking ahead, a 2020 study from The Vanier Institute of the Family concluded that “the impact and realities of a global pandemic on families is not yet known,” but they are optimistic: “Families are the most adaptive institution in the world. They are resilient, diverse and strong.”

Transforming work (and screen) culture

According to Statistics Canada, nearly 40% of Canadians were working from home in March, compared to only 10% in 2018.

Before the pandemic, *job creep* — or the idea that work can bleed into all hours of one’s life — was a problem that WFH has only made worse.

Months into the pandemic, Microsoft analyzed data on its newly remote workforce, finding that people were “on” four more hours a week, on average. Senior managers, meanwhile, were found to be collaborating with colleagues eight or more hours per week, their calls doubling from 7 to 14 hours a week, and “managers sent 115% more instant messages (IMs) in March, compared with 50% more for individual contributors.”

Microsoft also reported “a new night shift had taken root… with the share of IMs sent between 6 PM and midnight increasing by 52%.”

This doesn’t surprise Baeta. Halfway through a documentary project and ramping up production for a kid’s television show, “I am absolutely [working more] and definitely working more in spurts,” he said. “Work is no longer 9-to-5… It’s whatever hours I can fit here and there.”

Boundaries are blurring in ways that weren’t as acute in a physical workspace, especially since we use the same technology for both entertainment and work, often around the clock. (Globally, the average number of video streaming hours has increased by 57% compared to last year, which you can read about on page 38).

> “If I had to drag my son through grade 10, I would be in a much different position.”
>
> KAREN UNLAND
> Co-founder of Taproot Publishing

Emerging technology could further encroach on our physical space, as virtual reality (VR) work platforms like Vive Sync are being developed to allow remote teams to collaborate using VR headsets.

So it’s no surprise that *screen fatigue* has settled in fast. For her part, Unland avoids time spent in front of a laptop or television: “Increasingly,” she said, “if I don’t have to look at a screen for work, I don’t want to.”

And the dynamics of working with others has undoubtedly dramatically changed.

“I look forward to returning to a physical way of doing things,” said Baeta, who makes a point to “actually call” his colleagues, sends snail mail and has been known to leave a six-pack of beer on his business partner’s front door.

“The immediacy is just not there. . . There’s something nice about being in the same room and [talking directly] to clear things up as you are working on a file.”

The pandemic changed rules for people who are working in real life, too. On a shoot, for instance, “we have a lot of plans, contingencies [and] protocols,” he explained. “We do a lot of baby-proofing in the sense that we have to explain how things will work and reassure people with the safety measures in place.” (You can read more about that on page 92.)

The "upside"

As disruptive as this pandemic has been, WFH has also provided *some* people the flexibility to work and side hustle in peace.

"The office became a non-entity," said Abdul Malik, an Edmonton-based content producer, journalist and writer. With three jobs, the 27-year-old said he had a new-found surge in productivity, despite the increased reliance on screens, and it was a sentiment he shares with many of his peers.

"I don't want to use the word 'upside' because there are people dying and additional stressors being added to my life," he explained, "but on the other side it's like, 'Oh, this is how work should always be.' [I hit all my deadlines and] do it with less anxiety in my day."

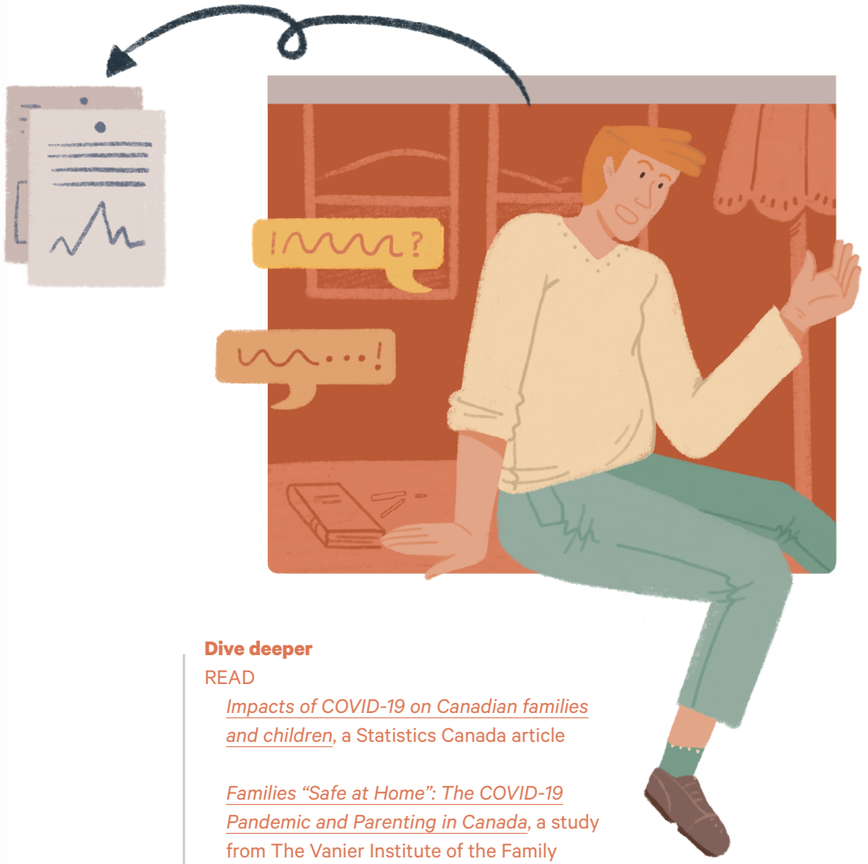
> "Families are the most adaptive institution in the world. They are resilient, diverse and strong."
>
> The Vanier Institute of the Family

For legal research analyst Rostyslav "Rosty" Soroka, COVID-19 presented an opportunity that wouldn't be possible without the change in work culture: when it was announced WFH would last until at least July 2021, he decided to move from Toronto to Castlegar, British Columbia, for a few months of remote work and weekend skiing.

Like most things in this pandemic, the freedom to move anywhere is a double-edged sword, especially for locals who are seeing an influx of remote workers seeking housing and services.

"There is a 0% vacancy in Nelson, BC right now," said Soroka, "It's full [because] there are a lot of software and tech people that are in my shoes who are migrating away from these COVID hotspots."

From the mountains, Soroka sees a future in a fully virtual worklife, despite the challenges it may bring: "I hope that certain cultural shifts that we've seen in the workplace [stay and] I'll be able to do something like this even when there's not a pandemic."



Dive deeper

READ

- *Impacts of COVID-19 on Canadian families and children*, a Statistics Canada article
- *Families "Safe at Home": The COVID-19 Pandemic and Parenting in Canada*, a study from The Vanier Institute of the Family
- *Running the economy remotely: Potential for working from home during and after COVID-19*, a Statistics Canada article
- *Microsoft analyzed data on its newly remote workforce*, a Microsoft Workplace Insights article

LISTEN

- Now & Next Podcast episode *Isolation Nation: When Going to Work Means Never Leaving Home*, on CMF

Navigating the disconnect

Now that everyone is distanced, Canadians find belonging in communities online

What behaviours will stick long term as digital media becomes a larger part of our lives?

Words

ANITA LI

Illustration

NITI MARCELLE MUETH

After months of lockdown in Montréal, with only her dog for company, Delphine Bergeron began to develop “this need to just be with somebody.”

The 37-year-old mental health counsellor and artist said she has always been a social person but, as a “security freak” in healthcare, she’s followed strict distancing rules. In the early days, she’d talk with friends via videoconferencing software like Zoom and FaceTime. Nowadays, Bergeron doesn’t use video as often but calls friends at least once a day on the phone.

But they aren’t enough.

Bergeron began gravitating toward interactive platforms, filling free time with Twitter, Facebook Live, YouTube, TikTok and Twitch. She’s not alone.

Company during COVID

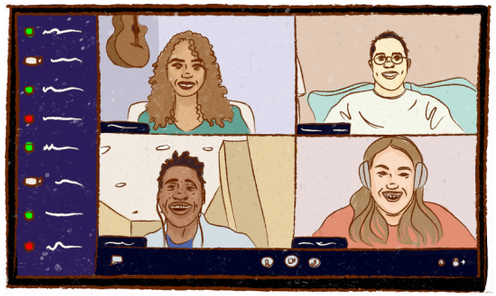
In March, direct messaging across Facebook-owned platforms such as Messenger, Instagram and WhatsApp increased more than 50% and voice and video calling had more than doubled as well. Facebook Live, which didn’t gain traction before the pandemic, grew in popularity after lockdown as it became one of the only ways to experience a live event.

And eMarketer’s US Social Media Usage Report 2020 forecasted that American adults would spend four more minutes per day on mobile messaging and seven more minutes per day on social networks than in 2019.

Use of previously obscure platforms like Google’s video chat app Duo, hyperlocal network Nextdoor and Houseparty, a service that enables group video chats, also got a boost in traffic during the pandemic.

Social virtual reality (VR) is also an increasingly popular way for people to connect while maintaining social distance, seen in the increase in demand for VR services in order to offer tools for remote collaboration, events, education, tours and more.

“More people are now doing ‘social virtual reality’ because they feel isolated at home and alone and they want to meet with other people in a safe way,” said Kris Kolo, the global executive director of the VR/AR Association, in a blog post. “[VR is] an excellent solution to maintain social distance.”



Connecting beyond conversation

Many people yearn for connection. According to YouTube's Watching the Pandemic report, views of #WithMe videos, where creators and viewers share in an activity, grew by 600% from February to May. Similarly, there's been a surge in social gaming.

Esports in particular have skyrocketed in popularity during COVID-19, with 5.7 million Canadians following multiplayer competitions. It represents a 29% growth year over year, according to a study from Viventel.

This surge doesn't surprise Kris Alexander, an avid gamer and assistant professor at Ryerson University's RTA School of Media in Toronto. Experimenting on Twitch, he once broadcast a full lecture to more than 100 viewers, maintaining those numbers for all three hours.

For years, Alexander has viewed online experiences as successful substitutes for in-person community building. He believes their popularity will continue to thrive even after the pandemic. "These communities are absolutely going to exist after the fact," he said.

"The beauty [is] that, in some ways, it's safer for people to engage... if something happens, you can close the window and never return.

"In some ways, the communities form tighter bonds."

Audiences want to watch others stream and play games together, said Alexander, and examples are everywhere, from people holding online weddings and graduations in the game Apex Legends, to people virtually fishing together.

Traditionally, the internet had long been a "world of its own," particularly in relation to the film, television and broadcast industry but, now that web platforms have gone mainstream and impacted broader society, "the rest of the world is subject to similar conditions of YouTube streamers," said Alexander.

"Who's at the forefront of the next phase? I'd argue it's the YouTubers."

Niche no more

More people than ever are also embracing platforms like Twitch. While it "initially started off as being video game broadcasting and consumption, overarchingly, we see different categories like art and music [emerging]," said Alexander.

Among Twitch's streamers is a popular classical pianist, a community of 3D artists and reputable DJs playing sets and parties. Even before the pandemic, Canadians were flocking to platforms like Twitch to find niche communities with which they could identify.

"These are the types of areas where niche communities are popping up and people are going there for a sense of satisfaction, as well as congruence between thought, emotion [and] feeling," said Alexander.

> "In some ways, the communities form tighter bonds."
>
> KRIS ALEXANDER
> Assistant Professor, Ryerson University's RTA School of Media

Now we're living in a time when New Democratic Party Leader Jagmeet Singh and US Congresswoman Alexandria Ocasio-Cortez play *Among Us* on Twitch to a rapt audience. This alone demonstrates how mainstream these online environments have become.

Content that reflects community

Sarah Thompson is chief strategy officer of the media-buying agency Mindshare Canada and thinks that Canadian audiences — especially younger ones — are increasingly looking for content that reflects their particular community and values.

"As you have a much more socially engaged [and] social justice-[oriented] Gen Z, they will demand clear storytelling," said Thompson, who added that they will only pay attention if they are represented, media talks about their issues and it reflects their value systems.

"We've started to see the end of formulaic TV and that [audiences] want fresh takes on a story, more diverse voices. This is also the influence of Black Lives Matter, LGBTQ+ issues, all of that. [Audiences] want to see more of who we actually are as people on TV and in content."

And since everyone is cooped up, TV viewing and streaming has also increased dramatically, which you can read about on page 38.

Towards infotainment

Despite seeking comfort in screens at the beginning of the outbreak, Canadians turned away from them by July, opting for outdoor activities instead, according to Mindshare's research. They also started consuming more optimistic content, deliberately choosing media to help them relax and de-stress.

Comedy was the top genre for podcasts at the outset of the pandemic, according to data from Acast, and was the second most popular genre tracked by the podcast measurement company Podtrac, with a 34% download growth through March.

Thompson predicts this trend will likely continue even after the virus is gone: "Are we going to [have] programs that are a little bit more optimistic? Are we going to come out on the other side [with] a little more sense of humour?"

On the flip side, Canadians are consuming news at a record pace. Media measurement and analytics company Comscore reported that news and information sites saw big increases in engagement in March.

But those who were addicted to news at the beginning of COVID-19 are now tired of the relentless news cycle and oversaturation of content. WIRED reported that as early as April, Americans had developed news fatigue and desensitization.

By mid-year, Mindshare's research also found Canadians were "becoming more cognizant of the content that we seek out, specifically limiting news updates."

"Where this translates the most, from a content perspective, is in the rise of documentary filmmaking and people diving into documentaries," explained Thompson. "You can get it all, it's fact-checked and it's something that [audiences] can stay with, versus watching the [news] story slowly develop."

Looking ahead

It's undeniable that the coronavirus has shaped the way audiences consume content, but what behaviours are here to stay?

It's likely that the trend of communal watching and playing won't be going away any time soon, since Canadians have demonstrated an increased appetite for shared online experiences like co-watching TV shows or playing against friends in an online environment.

"A lot of talented writers and showrunners [have also] been sitting at home thinking about life, coming up with concepts," said Thompson.

So, perhaps, the best content is yet to come.

Dive deeper

READ

Watching The Pandemic, an article on YouTube Culture & Trends

COVID-19 Pandemic a "Watershed Moment" for Canadian Media, an article on CMF

Stuff we watch Q2, a research report on Mindshare

Real Canadian Gamer Essential Facts 2020, a research report from the Entertainment Software Association of Canada

Netflix, Disney+, Amazon Video & Hulu: how are streaming habits changing? an article on GWI

Is moviegoing facing an existential crisis?

Words ANITA LI and MARINA HANNA

The pandemic has only accelerated a decline in theatres, making a second coronavirus wave an even bigger challenge than the first. But has COVID-19 really altered the cultural demand (especially given the resurgence of drive-in movies)? How will the industry pivot to draw in customers? And will Canadians flock to theatres once lockdown is over or fear the experience?

While the answers remain to be seen, major industry players are collaborating to figure out a sustainable path forward.

Cineplex, Canada's largest theatre chain, struck a deal with Universal Filmed Entertainment Group (UFEG) that preserves an exclusive theatrical window of up to five full weekends before moving to video-on-demand (VOD) platforms.

"With audience fragmentation accelerating due to the rise in digital, streaming and cord cutting... our relationship with exhibition had to evolve and adapt to the changing distribution landscape," UFEG Chairperson Donna Langley explained in a release. "Giving consumers the flexibility to view content on their terms is more important than ever to help expand moviegoing [and] increase opportunities for our Canadian audience."

Meanwhile, WarnerMedia announced that, in 2021, they will release all titles for one month on HBO Max, while simultaneously playing the movies in theatres for those who do not subscribe.

Beyond flexibility, experts in a recent *MarketWatch* report suggested that cinemas could boost post-pandemic attendance by experimenting with and broadening their offerings: "Why not offer the opportunity to see the TV series on the big screen with breaks and intermissions?" asked Anthony Palomba, assistant professor of business administration at the University of Virginia's Darden School of Business.

He also suggested that theatres could rent out venue space for major sporting and cultural events and encourage audience participation during screenings to get people in seats.

"You have to give people some kind of reason to leave their house," agreed Tom Alexander, director of theatrical releasing at Mongrel Media, a Canadian distribution company founded in 1994, adding that he supports the idea of "eventizing" the cinema experience as a way forward for prestige titles. The power is in the eye of the consumer, he said, and they have their sights on streaming services like never before.

According to a 2020 report from PricewaterhouseCoopers (PwC), subscription video-on-demand (SVOD) revenue is projected to surge in the coming five years, reaching more than twice the size of box office in 2024.

From an acquisition standpoint, it will be difficult for companies like Mongrel Media to compete in the long term since they can't put up the "many millions of dollars to get worldwide streaming" that a streaming service like Netflix can.

Fewer active cinemas plus streamers with mega purchasing power means it will be necessary to adapt and "jockey for a position in the marketplace," said Alexander, as the business model and theatrical distribution network has now fundamentally changed.

Audience preferences also remain to be seen. Recent research from analyst firm Parks Associates found 25% of US broadband households now prefer a subscription service to watch new releases, 24% still prefer going to movie theatres, and nearly 30% have no preference for how they watch a new movie, "which gives theatres a glimmer of hope that they can eventually gain back some audience for first-run titles," said Research Director Steve Nason.

While PwC isn't forecasting theatre revenues to recover to pre-pandemic levels until 2025, Marc Simon, a former filmmaker who is now a partner at Fox Rothschild and chairman of the firm's entertainment law department, told MarketWatch he expects the business model to eventually return somewhat to normal:

"People have been sounding the death knell for cinema for a long time and cinema has always survived," he said. "The communal experience of going with friends and loved ones to a dark room with a big screen and smell of popcorn is too powerful to die."

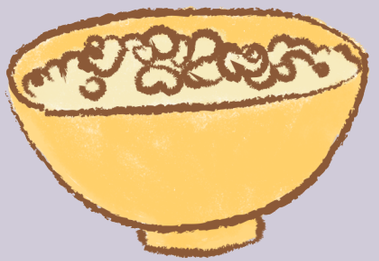
Dive deeper

READ

- *Why cinema will survive the coronavirus pandemic*, an article on MarketWatch
- *Global Entertainment & Media Outlook 2020–2024*, a report on PricewaterhouseCoopers
- *What does the film industry think is the future of exhibition?*, a survey available on Stephen Follows' blog

LISTEN

- Now & Next podcast episode *Making Movies Social Again: The Entrepreneurs Behind Hoovie*, on CMF



Dissemination and demand

I streamed, you streamed, we all streamed for… our own sanity.

Drifting from one type of content to another, a global pandemic created the most captive audience ever, suddenly appearing for content distributors. In the midst of COVID-19, connecting with an audience at the right time is as important as ever.

Seeking entertainment that was unfamiliar (yet comforting), these audiences added subscriptions to their streaming and gaming services.

How will creatives, distributors, platforms and media projects make themselves known in a world of seemingly endless content going forward? What if the pandemic has irreversibly changed the way content is targeted to us by marketers?

New audiences also participated in places like the Metaverse, a virtual platform bringing thousands — even millions — of people together. Could the audiovisual industry find its footing on virtual platforms to win over consumers that rarely used traditional distribution channels?

We travelled huge, implausible distances behind our computer screens during this pandemic. Do we miss each other? We certainly do. Will COVID-19 leave its mark on the way content is distributed here and abroad? Absolutely.

Change can be difficult, but the result is that content is forging new paths.

CATHERINE MATHYS
Director, Industry and Market Trends

CANADA
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The On-Demand effect

Why digital marketing will never be the same

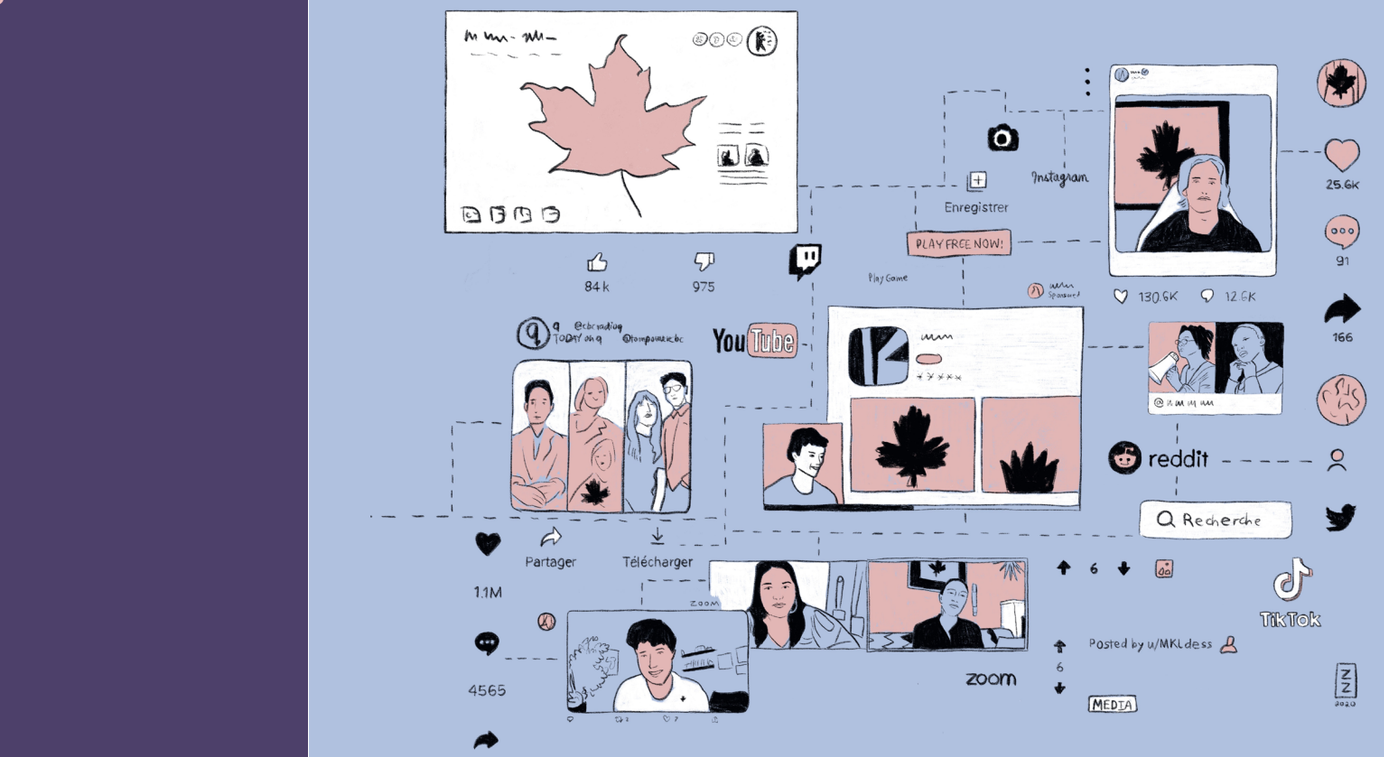
As new users flood Subscription Video On Demand (SVOD) and gaming platforms, producers and distributors need to rethink their marketing strategies. Shifts in entertainment habits, tastes, viewing patterns and device usage means adapting, engaging and catering to new audiences with engaging content.

Words

KELLY LYNNE ASHTON

Illustration

ZOÉ ZÉNON



The jury is still out on whether it's sustainable in North America, but the past year has seen an enormous increase in active, on-demand viewers.

According to Digital TV Research forecasts, global subscriptions for Subscription Video on Demand (SVOD) services were to increase by 170 million in 2020. By 2025, subscription services are projected to augment even further to 1,161 million – or an increase of 81%.

Meanwhile, time spent on Crave was up 60% between March and May, with views increasing by 57% on CBC Gem between January and May, according to reports from CBC. In the French market, the number of ICI TOU.TV users increased by 13% in 2020.

A study from the Interactive Advertising Bureau also found that, while word of mouth remains the top way that 48% of viewers hear about original shows, recommendations also come through subscription streaming services (40%), TV commercials (39%), online browsing (36%) and browsing the subscription streaming service menu (34%).

So while algorithms can be credited for referring content to viewers based on previous selection, marketers cannot rely on them alone. Increasingly, "content discoverability" and search engine optimization (SEO) are becoming an important part of the distribution playbook.

From binge watching to microtargeting...

When renewing commissioned originals, WIRED UK reported that the most important data point for Netflix is the number of subscribers who watched a show within its first 28 days of release.

This metric favours heavily promoted, mass-marketed shows rather than niche content that builds with a slow burn. As a result, smaller shows focus on getting a big audience hit up front in order to influence early renewal decisions.

It also explains a shorter promotional timeline: a four-month marketing campaign for shows launched over streaming services is done in four weeks "because they're binge-style shows," explained Dani Gagnon, co-founder of Toronto-based BAE Communications.

To leverage limited time and money, the strategy is *microtargeting*. Or "creating content and sending it to unique target demographics that you think will have a higher reaction score to [what] you've created."

Utopia Falls, for example, is a sci-fi hip hop show that aired on CBC Gem and Hulu for young adults and featured gay, Black and Indigenous leads. To promote the show, "instead of putting out one trailer and blasting it to everyone, we created unique mini-clips and trailers that we could target specifically," said Gagnon. So a clip of the gay couple was sent to a demographic of women interested in LGBTQ+ issues.

While they had a hugely positive reaction, microtargeting requires content producers to have a deep understanding of their viewers. BAE Communications targeted for age and race, but also audience interests such as racial justice and queer culture.

This point on data was reiterated by Fandango Media President Paul Yanover in a recent talk: "As the producer of the content, to what extent do you know the target audience? Can you acquire the data [and] perfect it?

"Can you walk in with a great piece of content and with the data know-how alongside it? That sweetens the pot."

As Millennial and Gen Z audiences are voracious consumers of content related to their favourite shows, the data is out there — as is the demand. "People are just eating content up and everyone is pedalling as fast as they can to get them as much [of it] as possible," said Gagnon.

Creating it doesn't have to be expensive, either. BAE Communications was hired by *American Gods* to capture behind-the-scenes footage of its third season for social media, which they produced with a smartphone.

Still, Gagnon laments the current "binge and done" marketing push as it misses an opportunity to engage with a community long-term, growing an audience for a show over time, the way that a broadcast does.

Famously, CBC's *Schitt's Creek* took time to build audiences in Canada and on ViacomCBS network Pop TV in America before becoming a Netflix sensation in its third season, sweeping the 72nd Emmy Awards.

... to reaching video gamers.

Video game consumption is also up. Quartz reported that US gaming sales increased 37% year over year to $3.3 billion in 2020, with analysts expecting higher engagement now that more consumers than ever are interacting with distant friends and families through the medium.

Steam is the main distribution platform for downloadable independent video games, with a similar structure to SVOD services. Machine learning is used to predict game preferences based on play history and the platform features big name games, like the latest instalment of *Baldur's Gate*, as well the popular pandemic hit *Among Us*.

Since they have gone mainstream, no longer only being played by hardcore gamers, video game marketers have similar challenges as those in television to fight through home page clutter and drive targeted audiences to new titles.

"Can you walk in with a great piece of content and with the data know-how alongside it? That sweetens the pot."

PAUL YANOVER
President, Fandango Media

Astrid Rosemarin and Janine Campos work at Evolve PR, a video game digital marketing agency. They said they've noticed a huge growth in both demand and audience. Campos cited her friend as an example of this new wave:

"She has two little kids," she explained. "She never played games, [is] not into games at all, knows almost nothing about games [but] now she's sitting at home playing Among Us because she kept seeing it on TikTok."

While the traditional cycle to launch a game remains (announce it, push out a trailer and run ads), Evolve PR sees even more marketing opportunities due to plummeting ad rates and increased interest from mainstream media.

Rosemarin views a video game marketing campaign like a jigsaw puzzle, with ad campaigns, PR, community-building and social media — all pieces that help "the consumer [on] this journey of learning about your game."

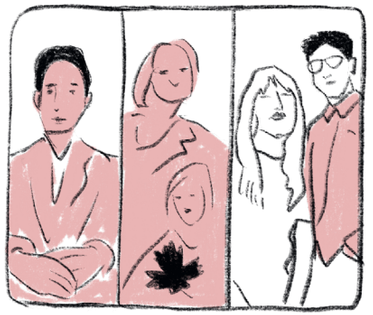
But taking them down the marketing sales funnel takes time and needs a lot of promotional content, she added. "They have to be intrigued by every piece of content that they see."

Like linear video, Evolve's marketing is not about old-school demographics of age and gender, but about finding "like" audiences based on interests and using social media as an effective tool to target them.

"If you liked playing *Firewatch*, you will probably like this other game where you are exploring the wilderness or building a relationship with someone over a walkie-talkie," said Rosemarin. And since there's never enough content, she suggested expanding the market reach by talking about topics that are similar to the game being promoted.

"If you're working on a space game, share cool rocket news. You will pull in people who are not there for the game first, but they will be there for your ecosystem, your brand, and they'll help spread your message."

The common thread for today's digital marketers is finding your niche audience and using engaging content to pull them down the path to your television program or game. And while that doesn't have to be expensive, it must be, above all, entertaining.



Dive deeper

READ

Futur et médias podcast episode *A 2020 Vision of Discoverability*, on CMF (transcript available in English)

Why Netflix Keeps Canceling Shows After Just 2 Seasons, an article on WIRED UK

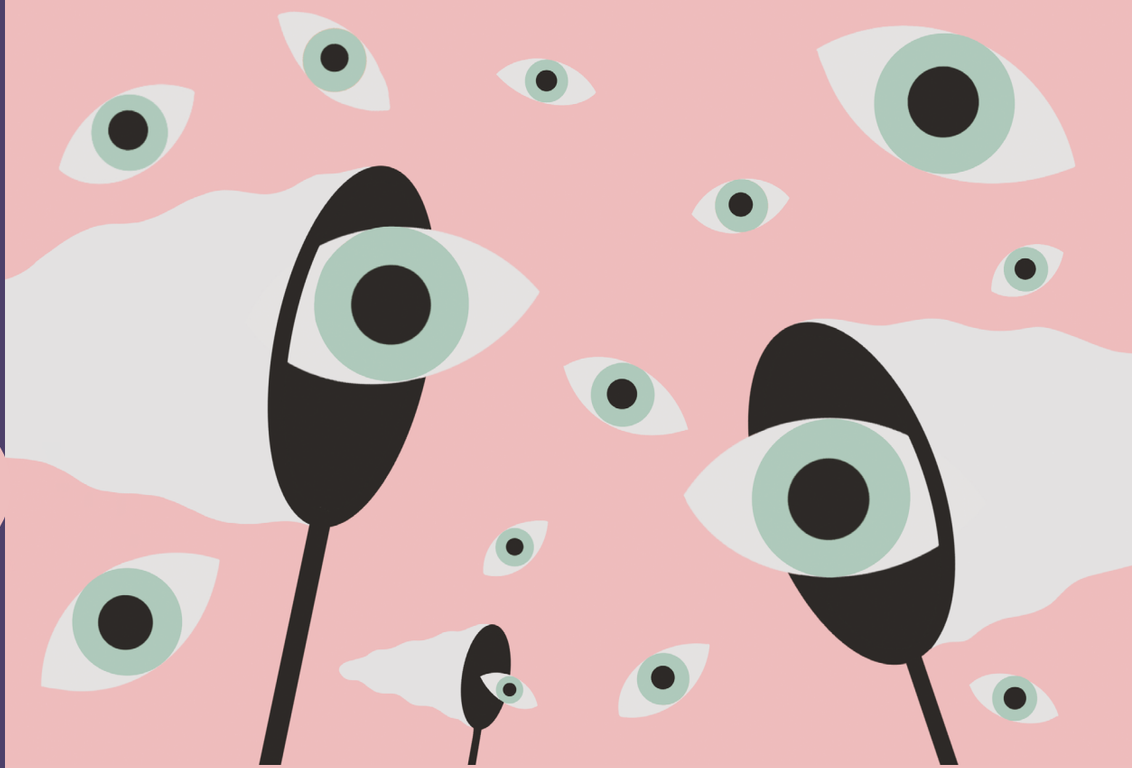
The Value of Fandoms in Understanding Audiences, an article on CMF

Discoverability by Design: Rethinking How Video Games Get Noticed, an article on CMF

COVID-19: What's Next for Video Game Studios? an article on CMF

Streaming wars

The battle for ad dollars and eyeballs accelerates



As the pandemic shuttered live events and delayed linear TV schedules, viewers spent even more time on over-the-top (OTT) platforms and non-linear services. Now that all eyes are online, how will Canadian streaming services keep subscribers and increase content?

Words
AMBER DOWLING

Illustration
JULIEN POSTURE

If the launch of Disney+, HBO Max and Peacock was a greenlight in the ongoing streaming wars of 2020, the pandemic was a foot slamming the accelerator to the floor.

Disney+ is on track to reach 226 million worldwide subscribers by 2024, nearly quadrupling its initial goal of 60–90 million. Its competition, Netflix, is forecasted to have 292 million global subscribers that same year.

Peacock reported 10 million American subscribers out of the gate, WarnerMedia reported 36.3 million to HBO and HBO Max in June, Hulu subscriptions were up more than 20% year over year, and Prime Video accounted for more than 23% of all global video-on-demand (SVOD) subscriptions — up 14% from the previous quarter.

Global viewers spent 57% more time streaming compared to last year, with double-to-triple increases on every continent. At this rate, total global SVOD subscriptions are projected to reach 1.6 billion by 2025.

And streaming services are seeking out the sweet spot of how many packages a typical viewer will subscribe to. The average American family has 3.8 subscriptions, according to research from Ampere Analysis, and a Futuresource study indicated that "service stacking" will become the norm, with 70% of users willing to add new subscriptions.

In response, companies aren't just restructuring around streaming services and shifting premium content online: they're scrambling to pick up billions of dropped ad dollars, strategizing how to retain rotating subscribers, and heavily investing in content to fill their platforms in a rapidly changing marketplace.

Streamers vs distributors

Distributors have emerged as the gatekeepers of content availability. Players like Roku and Amazon are negotiating larger slices of advertising inventory and subscription revenue — in some cases soliciting free programming for their own advertising-based video-on-demand (AVOD) services.

It's a business that mirrors classic carriage wars between programmers and distributors. And for Canada, this has led to wary negotiations.

"It's like a mall. We want people in the mall to go into our store… if you're not in all the malls, you're not going to get seen," explained Jeff Hersh, vice-president, strategy, OTT Distribution and Premium SVOD at Bell Media.

Hersh said that Crave, for example, has worked aggressively to become available on all distributors as an app but the company has been slow to adapt to Prime Video channels — opting to test STACKTV (a multi-channel package for Canadian Amazon Prime members) with its Starz platform, and waiting to see the potential "cause and effect."

"These are large, global players and, from a Canadian perspective, Crave is a local, Canadian product. We have to be smart in how we are acting [and] be selective in how we work with some of these distributors," he said.

"Our goal is [that] we want, as best we can, to own the experience."

Original content vs partnerships

Brad Danks is CEO of OUTtv, the world's first and only premium LGBTQ+ television network. He remembers being the first Canadian channel available on Apple TV in 2019.

Today he thinks homegrown streaming services should be cautious of global, direct-to-consumer distributors that also create their own content (think Disney+ or HBO), as it will inevitably impact the size of Canada's distribution market, continuing to shrink the cable bundle.

"We lack a strategy in Canada. We completely lack a strategy," said Danks, adding that there's a danger in not focusing on global growth. "We got used to taking Canadian content and then selling it abroad to a third party [but] the innovation that's necessary in the Canadian system is that that content be bundled up and take a position in foreign platforms.

"People say content is king, but distribution is the kingmaker."

As programmers make sweeping deals with new American services to bring acquisition programming into the country, "we need to rethink our industry in those terms," he said. "And we need to do it soon. Maybe now, because we're falling behind."

Christiane Asselin, ICI TOU.TV's senior director, multiscreen content and programming, believes strategic partnerships will keep content alive as the market plays out.

The goal of the French-language streaming service is to retain and share the best content between partners, with platforms like Radio Télévision Belge Francophone (RTBF) and France.tv allowing them to do so.

"We try to gather as much as [we can] in one platform [as] it helps [audiences] discover other content," she said. "We have a better offering for the subscriber [that way]. In 10 years, there will be more partnerships because not everybody will survive."

Transitioning ad dollars

Part of the equation is how partnerships will fit into current monetization models.

Traditional streaming providers have offered SVOD, AVOD or a combination of both, like CBC Gem, but the pandemic has led to even more experimentation with tiered services.

Major players like Disney+ also unveiled "Premier VOD Access" to content like *Mulan* — making the live-action film accessible for their own subscribers for $29.99.

And then there are free, AVOD models like Tubi, the GlobalTV app, or CTV Throwback, which rely fully on ad-supported digital spaces for revenue.

Industry insiders are watching these models closely, while keeping an eye on emerging ad technologies like pause-ads, which appear when a viewer pauses a program, and integrated campaigns and brand partnerships, which incorporate ads into original programming and content.

It's an ever-evolving model, Hersh said, noting the inaugural season of *Canada's Drag Race* on Crave as an example of advertising becoming part of the consumer choice.

"If the consumer understands what they're choosing and what they're paying for, they're much more oriented to [advertising] versus effectively pushing it onto them," he said.

Danks explained that OUTtv Go hasn't added advertising due in part to its relationship with ad-free distributors like Amazon and Apple. But as the company expands, it's eyeing AVOD models for other markets in the future.

"These platforms are new and it's very chicken-and-egg," he said. "They're going to have to build audiences before they can get the advertising. [And adjust when] they get the advertising up a little bit. For a lot of these services, it's going to take a year or three before they get to where they want to [be]."

Keeping subscribers hooked

Programmers may be eyeing the long game but, during the pandemic at least, viewers have chewed through programming faster than ever. This has increased a need to populate streaming services with more content or risk losing subscribers.

"We're seeing more people come in and out of products, which is not something historically people would do when they had their TV subscription," Hersh said. "Distributors make it easy for people to [do] that."

But he thinks two things will keep subscribers put: great content and marketing.

Danks agreed that high-quality content — especially when it is targeted or a flagship series — will continue to drive subscribers but, as more options become available, pricing strategies will fluctuate to give annual subscribers bigger breaks and loyal customers some benefits.

"We've probably been too liberal with free previews and free-trial periods," he said. "You're starting to see Netflix and others cut that. The prices for SVOD are so low, I don't think the consumers understand them."

> "People say content is king, but distribution is the kingmaker."
>
> BRAD DANKS
> CEO, OUTtv

Asselin feels that most streaming services have great content (or believe that they do) but creating user-friendly experiences will be paramount.

She pointed to Quibi, a commuter-targeted, short-form streaming platform that shuttered after only six months as an example of not understanding users' needs.

"The winner is going to be the best platform that builds a great experience, drives discovery and has a marketing strategy to reach and retain their audience," she said. "It's a lot of work to make sure that the catalogue is deep but you have to help people see other content and know about it.

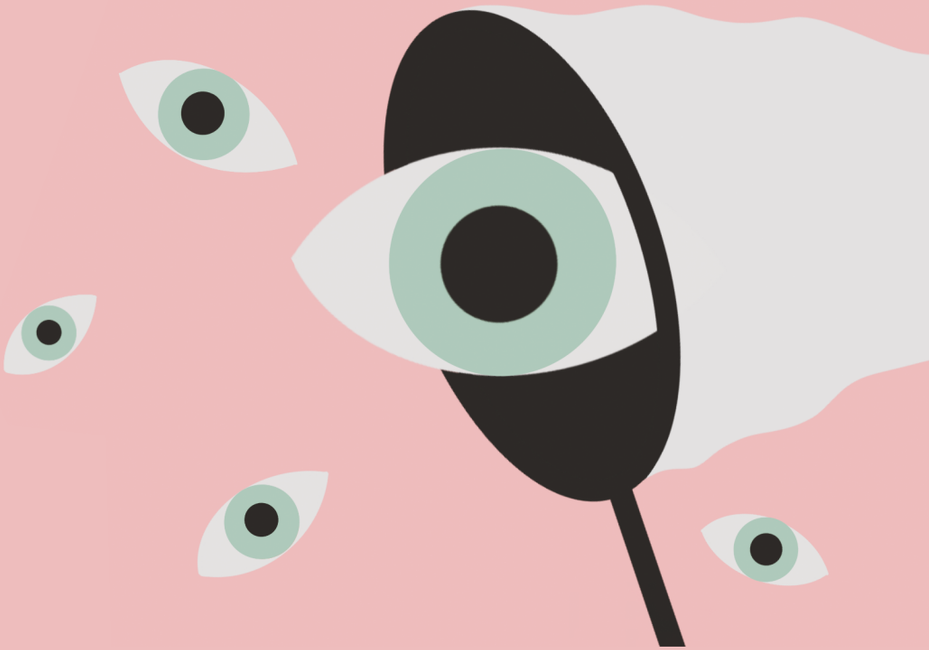
"It's going to be the survival of the fittest."

Dive deeper
READ

State of Streaming Q3 2020, a report on Conviva

TV battles spill into streaming, an article on Axios

Is Quibi the First Casualty of the Streaming Wars?
an article on Bloomberg



Into the Metaverse

How Canadian content is making its way in the virtual world

From *Ready Player One* to *Reboot* to *Tron*, virtual universes have been a staple of pop culture for decades. But as parallel worlds increasingly become immersed in our lives, where will we go from here?

Words

JOSEPH ELFASSI

Illustration

LIN LUO

Neal Stephenson published his classic, soon-to-be-adapted, science-fiction novel *Snow Crash* in 1992. In its cyberpunk future, a young hacker called Hiro Protagonist logs on to the Metaverse: a parallel, virtual world with galactic haircuts, black suns and information-consuming Gargoyles. It never turns off; the relationships are real and the transactions are official.

And ever since, the idea has gone absolutely mainstream.

From a red-or-blue-pill dilemma in *The Matrix* to the mainframe, the duality of our fleshy selves and avatars is widely accepted and understood: on the one hand, I walk the Earth. On the other, I know kung-fu.

The "third place" — a term coined by sociologist Ray Oldenburg in 1989 — refers to social surroundings beyond the home and work, such as bars, churches and gyms. Since most "third places" have closed due to the COVID-19 pandemic, people have turned to virtual versions.

Occupied by generations of gamers welcoming locked down n00bs (newbies), these parallel worlds now host events traditionally held in physical places like festivals, parties and exhibitions.

Entertainment and the Metaverse

Travis Scott's performance on the Fortnite video game platform gives us a glimpse into this boundless, hybrid future.

The digitized superstar performed his hit "Astronomical" to 28 million unique viewers across five shows in April 2020, with dancing avatars in impossible outfits gravitating around the much-larger-than-life rapper.

A month earlier, alt-rock fans walked around Weezer World on the platform; a month later, Fortnite presented screenings of films by Director Christopher Nolan ahead of the *TENET* release.

Even American politician Alexandria Ocasio-Cortez played *Among Us* live on Twitch recently, connecting with 400,000 viewers who followed her progress in the massively trending game.

And the list, as they say, goes on.

But a virtual platform isn't exactly a new idea. In 2006, BBC hosted an online music festival in Second Life, featuring Gnarls Barkley and Muse among the headliners.

"Back in the day, we [also planned] a real-time concert in Sim Live," recalled Louis-Richard Tremblay, an executive producer at the National Film Board of Canada (NFB) who co-founded Radio-Canada's Bande à part. "But the project was never enough of a priority to materialize."

The future is here and it's... special.

Leading the NFB's Interactive studios today, he has produced immersive virtual experiences for the past decade — starting with indie rock band Malajube's interactive music video. While a presence in Fortnite or Minecraft isn't in the works just yet, the platforms are definitely on the Canadian studio's radar.

"We're always paying attention to these kinds of revolutions," Tremblay said. "We're exploring... You have to understand gaming culture [and] habits because these platforms are still game driven. Interactive documentaries are not necessarily game driven."

The challenge with documentaries, Tremblay says, is to follow the specific codes of online environments without losing sight of the message.

Combining both worlds while producing *Streamers* — an NFB documentary series that follows the entrepreneurial adventures of professional gamers — Tremblay became well-versed in the culture, which can only help propel collaboration between virtual universes and traditional institutions.

Canada's place in a virtual world

In October 2020, CBC Kids News hosted a live event on Minecraft for children across Canada as they lived through a very unique back-to-school experience.

The virtual gathering allowed kids to create emojis expressing their feelings, chat with guests like Montréal microbiologist and epidemiologist Dr. Caroline Quach-Thanh, and it even gave their online avatars the chance to destroy a huge Coronavirus particle as a team.

Canadian artists, meanwhile, are on the vanguard. This year, Montréal's PHI Centre created an extended reality (XR) virtual roundtable event called *Unchartered Territory Is the Norm*, which was hosted by Myriam Achard, their chief of new media partnerships and public relations.

In a live-streamed scene that could have been straight out of *Snow Crash*, Achard's humanlike avatar welcomed international XR creators, who showed up as a donut wearing a chef's hat, a frog and a pointy-nosed character in a three-piece suit.

The future is here and it's... special.

Bringing it home

Phoebe Greenberg, who founded the PHI Centre, wrote about the challenges of presenting new media during a global pandemic in a special issue of *Immerse*, a publication of Medium.

In her essay "Building on Experience," she explored the immediate future of virtual and extended realities, arguing that "immersive technology plays a pivotal role [in] an era where physical distances and intimacy are mediated by technology."

The PHI Centre also extended VR experiences to headset-less homes through a special rental service project called VR to Go. Lending out 75 headsets in Montréal and 30 in Québec City for 48 hours at a time, they were able to reach audiences who would otherwise have been left out of this technological transition period.

"We loaded 10 different works [including] documentary films, animation [and] abstract pieces [onto the headsets]," explained Achard. "We consider the program a success, as there definitely is interest for these experiences."

The Vancouver International Film Festival (VIFF) Immersed Exhibition, meanwhile, embraced new audiences at home by streaming free of charge on six different platforms simultaneously, including the Museum of Other Realities (which hosted the Festival de Cannes and Tribeca Film Festival online this year), Oculus TV and YouTube360.

"Gaming as [a] strategy is not new," said Ken Tsui, director of creative engagement & live programming at VIFF. "A lot of festivals are moving towards this… It will all coalesce, I think, [in] a year or two."

However, headsets still haven't garnered widespread adoption, he added, even though "it's more affordable than ever. There's lower overhead [and] you no longer need a gaming PC.

"The sales are not necessarily spiking, but the industry is trying to introduce them seamlessly."

Vast worlds on traditional screens, perception-manipulating headsets like the Oculus Rift or a combination of the two — as seen in the NFB's interactive pilgrimage *The Book of Distance* — suggest that virtual immersion may take on many forms moving forward.

As contemporary content shops, art galleries, events, studios and record labels eye the etiquettes, cultures and massive potential audience reach on gaming platforms, the next leap towards virtual reality is bound to be transformative.

"We have to be open to all types of collaboration," Achard concluded. "The sky's the limit."

Dive deeper

READ

The Metaverse: What It Is, Where to Find it, Who Will Build It, and Fortnite, an article on MatthewBall.vc

Next gen entertainment, an article on Wunderman Thompson

Building on Experience, an article on Immerse

WATCH

Uncharted Territory Is the Norm, on Centre Phi YouTube channel

Extending reality during a pandemic

Words JOSEPH ELFASSI

Gathering spaces may be closed but screens are *on*, making 2020 a pivotal year for immersive producers of extended reality (XR).

And along with the rest of us, XR innovators are adapting from one day to the next.

Coproduced with NASA and the Canadian Space Agency, the virtual reality (VR) show *Space Explorers* is in its second season. The show presents the daily life of astronauts at the International Space Station. "We were one of the few productions that wasn't stopped by the pandemic [because] our film set was in space," explained Stéphane Rituit, producer and co-founder at Montréal-based Felix & Paul Studios.

Episodes on Earth were filmed before the start of the pandemic and the impact of COVID-19 was felt at the launch and public viewing. The first two episodes of the first season were available on Oculus Quest as planned, but the five-year tour scheduled for IMAX domes and cinemas across North America and Europe was put on hold due to the lockdown.

The Montréal premiere at the planetarium was postponed until 2021 and other delays, like an IMAX screen release in Houston, are stacking up.

So the staff at Felix & Paul Studios have had more time to edit.

Launches go virtual

For eight National Film Board (NFB) interns, the pandemic also had an unexpected editorial benefit. Their interactive, cautionary experience called *bubble* was completed at the beginning of 2020 but takes its participants to Montréal in 2050, a year where global warming has increased by two degrees.

"[Before the pandemic,] we were inspired by how people in Asia wore masks," explained Marianne Bourdages, a *bubble* programming intern. The concept for the game came from exploring how individual acts can help solve a collective problem — like putting on a helmet (or *bulle* in French). "It was surprising to see how relevant bubbles and masks became when we unveiled our project."

Slated to be unveiled in the French-language newspaper *Le Devoir* for Earth Day 2020, the promotional strategy for *bubble* did not see the light of day, as the truth was increasingly stranger than fiction.

"[It] was quite surreal," said Bourdages. "We wanted to wait for things to settle."

Their launch finally took place in August 2020 and the mobile video game has since been shared by more than 7,000 users, exceeding the NFB's expectations.

NFB project Motto.io, an interactive ghost story made up of thousands of tiny, crowd-sourced videos, had a similar success story in 2020. Designed as a mobile experience, it was expected to launch with a live event so participants could move around like a ghost looking for a friend.

Vincent Morisset of the acclaimed digital production studio AATOAA was behind the project and had to forgo a public launch. He and his team decided to zero in on homemade videos instead, leading to a stunning collection of footage that has been collectively assembled by the audience.

The mobile website got more than 420,000 unique views since its launch in January 2020

and is moving toward its expected target of 750,000 users.

Supporting XR creatives

As far as festivals go, Laura Mingail, who founded the digital strategy firm Archetypes & Effects, was able to attend both the virtual edition of the 77th Venice International Film Festival and Cannes XR from the comfort of her living room.

In Mingail's experience, VR events have a similar impact than those that are held in-person.

"I was magically transported to a virtual environment with guests from around the world; it's a perfectly fine alternative," she explained. "People are okay with minor inconveniences [and] when things don't go as planned."

The VR market certainly seems promising: fifteen virtual reality projects presented at Tribeca in 2020 got nearly 46,000 views, which is an audience that reaches far beyond their physical capacity.

Audience interest is clearly there, but what creatives need right now is financial and industry support to keep producing. In the meantime, the XR community has been supporting each other.

Even prior to the pandemic, professionals in the XR industry gathered together across the globe through the cooperative platform Kaleidoscope to seek funding opportunities when traditional grant options came up short. On the platform, immersive projects from members are put to a vote to receive financial support from creators or foundations.

Kaleidoscope became even more relevant when government bodies were faced with an unprecedented health crisis. And like everyone else, it had to review its strategy in order to adapt to new health constraints.

With a goal to generate $100,000 per month in grants for creators by January 2022 — ten times the current amount — the organization seeks to support those working in the fields of XR from dance to film, video games to visual arts.

Now is the time to shape this space, said Morisset, who added he would like to see political willingness on this front.

"We don't need showcases. We already have that. What we need are funding resources and major support to produce real content," he said. "We don't want cosmetic changes but ambitious, quality projects that reach the general public."

Morisset also lamented a lack of XR creators on major platforms such as Netflix, Facebook and other giant apps, which is where trends materialize. These platforms provide participation, activities and a relationship to time that differs from television, he said. "This is a good time to think about that and for culture to move forward on digital platforms."

"XR creators are instinctively innovative and constantly alter the rules and boundaries," agreed Mingail. "Creators are dreaming up new prototypes every day."

Dive deeper

READ

Does the COVID-19 Signal Yet Another Rebirth of Extended Reality?
a Futur et Médias podcast episode transcript on CMF

Immersive Creatives and the Impact of Covid-19, an article on Immerse

COVID-19: What's Next for Video Game Studios?, an article on CMF

The VR arcade that Disney crowned is teetering on the brink of extinction, an article on The Verge

Producing content

in unprecedented times

Without a doubt, 2020 will be remembered as the year everyone dug deep to ensure the screen industry survived and seized a moment to explore, try new things and do better.

Different sectors reached across the aisle to collaborate and lean on each other's expertise so that the collective could make a comeback.

Masks were worn, teams were smaller and numerous health guidelines were followed to carry on.

We pushed through and tried new things.

COVID-19 brought two great forces of our industry — video games and filming — together at long last. Virtual productions were made possible by game engines, which created new sets and environments as needed, making it possible to move from scene to scene without travelling to another city. Once the pandemic ends, will these new collaborations continue to be the standard?

By travelling less (or not at all), this industry also took the opportunity to rethink its relationship with the environment. Ensuring the safety of those on set in a way that was both environmentally friendly *and* followed applicable regulations was not only desirable, but achievable.

Let's hope this mindfulness lasts.

CATHERINE MATHYS
Director, Industry and Market Trends

CANADA
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Lessons from virtual festivals

Screen-based industry events became digital experiences in 2020, changing how we network, access and distribute content, and experience festivals


TikTok
2020

For sales agents, publicists, distributors, buyers, programmers, producers, streamers and many other industry players, festivals and industry events are where deals are made and where content is bought and sold. For emerging creators, announcing a project in a festival lineup can be a coup, an opportunity to showcase their talent and create lasting connections.

Suffice to say, they are still a big part of the industry game. In 2020, they were compelled to adapt — and quickly.

Words

RIME EL JADIDI

MARINA HANNAH

Illustration

ZOÉ ZÉNON

For the Banff World Media Festival (BANFF), which leans on networking, facilitating pitches, quick one-on-ones and "coffee with" opportunities, 2020 posed very specific challenges.

"It's about the meetings that happen there," said BANFF Executive Director Jenn Kuzmyk. There is just something about being at a festival in person that is difficult to capture virtually.

Before the pandemic, BANFF boasted a record of more than 25,000 meetings over their four-day event. In 2020, they managed to exceed 4,600 online meetings and 575 pitches.

Their goal in 2021 is to get meetings back to pre-pandemic numbers, despite being digital-first.

With only a number of weeks to build their virtual festival as lockdowns set in, BANFF uprooted the entire organization and staff were retrained to produce and direct live content on a new platform. The work paid off, said Kuzmyk, "we grew massively."

Before cancelling the live event, BANFF was 40% ahead on pass sales. While those tickets were refunded, the virtual festival eventually grew to 5,000 attendees from 52 countries — compared to the 1,500 who attended in 2019.

Canadian delegates and company participation increased from every province and territory, as did participation with talent such as showrunners. "One of the great benefits of [going] virtual [is] the expansion of the people we can reach."

Making virtual connections

Certainly, going digital created accessibility for those who were not previously engaging with festivals or had financial or geographic barriers in doing so. Virtually expanding entry to festivals across the country allowed for more participants.

Toronto International Film Festival (TIFF) jumped on the occasion to introduce new talent to the mix, getting corporate sponsors and independent donors to support the cost of a pass and making it free for 250 under-represented filmmakers to attend.

Josiane Blanc was one of them. This year, she participated in TIFF and Hot Docs, the Festival de cinéma de la ville de Québec and the Banff World Media Festival 2020. The advantage of online events, she said, is that they fit more easily into a busy schedule. "During festival season, I was in pre-production of my upcoming web series. I was very busy so I wouldn't have applied to festivals if they weren't virtual," she explained.

Along with time constraints, the financial burden of attending events can also prevent participation, so many individuals and organizations welcomed the lower virtual costs. La Guilde du jeu vidéo du Québec, for example, usually sends two game studios to the Tokyo Game Show convention each fall. Last year, 17 studios participated, said General Director Nadine Gelly.

Some organizations even offered financial support. For the first time ever, the Vancouver International Film Festival (VIFF) AMP Talent Accelerator program offered emerging musicians a stipend for participating. “It’s a really challenging year for musicians who rely on live performance,” explained Ken Tsui, VIFF’s director of creative engagement & live programming.

As an education and development initiative that connects participants to music supervisors and other talent, AMP “helped people open up to the idea [to] perhaps license their music, get [it] published on film and TV [and] consider composing as a new revenue stream,” he added.

“Most musicians don’t think about how they can license their music for a Netflix show.”

“It’s all well and good to get applause on Zoom and other platforms but we must not forget that humans are made to be together.”

MARINA MATHIEU
Director

Changing the formats of TIFF’s 2020 industry events excited Senior Director and Lead Programmer Geoff Macnaughton and his team, as they realized that emerging filmmakers and independent producers would need help navigating the festival and establishing contacts. They used the Cinando Match&Meet app to connect festival goers.

Investing in streaming technology was also key for TIFF. Like BANFF and others, the Festival customized a digital platform, collaborating with Bell Media’s Crave for a stay-at-home cinema initiative.

The TIFF Bell Digital Lightbox, a virtual cinema, also played a selection of past releases, Cinematheque titles, their “In Conversation With” series, as well as programmed talks and Q&As, which contributed to an audience experience the festival was determined to maintain.

For Macnaughton, the virtual festival created a whole new level of intimacy: “If the group is small enough,” he said, “you’re actually seeing inside people’s homes and the way they live and all these things that you don’t get in an in-person experience.”

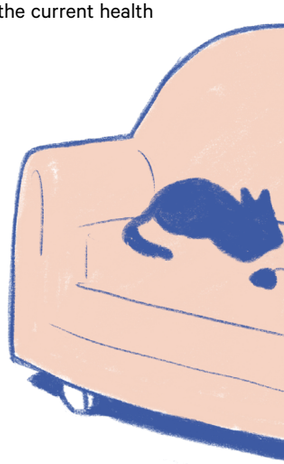
Blanc had a different take: “Running into someone by chance or starting a conversation with a person sitting next to you is impossible digitally,” she said. “These kinds of encounters have been the most important ones in building my career. It’s not always during a scheduled meeting that I built the greatest connections.”

Montréal-based director Marina Mathieu, who pitched an upcoming project during the 2020 Montréal International Documentary Festival, felt that the screen creates a barrier. “It’s hard to read body language and even more so if you’re having internet connection issues, she said. “It’s doable but I’m wondering if this is how we want to be networking in the future...

“It’s all well and good to get applause on Zoom and other platforms but we must not forget that humans are made to be together.”

For dealmakers like Vancouver-based producer Kent Donguines, who participated in both TIFF and VIFF, virtual networking was a challenge. His production company, Aimer Films Inc., was hoping to find the right partners to fund and distribute their projects but, unfortunately, were unable to do so. Donguines thinks it’s because these events were not happening in real life.

“It was harder for my business partner and I to book actual meetings online, rather than just approach someone in person,” he said, citing limited spots in speed-meetings, cold emails not having quite the same effect and the industry itself, which is still figuring out how to operate within the current health challenges.



A lack of human contact has also disrupted funding in gaming, said Gelly. “In our industry, it’s rare to sign an agreement at the first meeting,” she explained. “It’s a long-term relationship: you have to earn the trust of the investor and trust behind the screen is a little more difficult.”

While game developers have access to more investors thanks to the virtual aspect, the process of signing a contract is longer now.

“I have the feeling that once in-person events are back, we will have contracts signed faster,” she predicted.

Towards the hybrid event

It may be too soon to predict what’s in store for events and digital markets, but insiders agree that things will never be the same — the virtual aspect is here to stay, even when in-person events are possible again.

“We had a global audience this year,” said Tsui. “It was really heartening and exciting to see [and] it made us realize that perhaps we should always have a digital component in order to engage folks that may not be able to travel.”

Macnaughton agreed that a new level of access has opened up TIFF: “We definitely want to lean into these opportunities in the future,” he said. “Not feeling like we are a $200 flight and a $1,000 hotel away from people. We can utilize conference call tools to connect people and still find a way to make it intimate.”

But one major feature that TIFF sacrificed was their lineup, choosing to program only 50 feature films as opposed to 300. So gone were the galas and special presentations, with many big studios holding titles back rather than risk playing them on digital, third-party platforms.

Fewer features meant fewer films to promote and sell. “[We’ve] had up to 18 films in [TIFF] and this year we had two,” said Andréa Grau, founder of the independent boutique agency Touchwood PR, which is based in Toronto and specializes in film, TV and festivals.

Nothing can replace the experience of seeing a film on the big screen, with the talent in the audience, on the night of its premiere, she added. “[It’s] the magic of cinema… the buzz component.”

But from a market perspective, bottom lines didn’t bottom out: TIFF saw more than $100 million in film sales — even with fewer titles in the official selection. Macnaughton explained it “represents the highest value of sales we’ve seen reported out of TIFF in the last five years.”

In many ways, digital festivals, events and markets successfully pivoted. But with no end of the pandemic in sight, they must continue to innovate and become more sophisticated and engaging. Moving forward, the strategy for many will be digital-first, projecting that travel will not have returned to normal.

The more that festival platforms and programming allow for interactivity, the better.

Not all barriers have been overcome and it remains to be seen whether a virtual festival can recapture the energy, urgency and spontaneity that occurs at a live event. But although there are many more unknowns in 2021, this year has shown that festivals, events, and markets remain essential.

Dive deeper

READ

How to migrate an entire festival programming online in record time, a Futur et médias podcast episode transcript on CMF

Canadian Film Festivals - English Virtual Round Table, a webinar summary on Telefilm Canada

How a lack of live festivals puts indie producers in a bind, an article on Kidscreen

Media Business Development and the COVID-19 Crisis, an article on CMF

Is it worth it to attend a Virtual Tech Conference? an article on Towards Data Science

Global players and Indigenous culture: Navigating Canada's cultural context in export markets

Words KELLY LYNNE ASHTON
With files from LAURA BEESTON

As we shift to virtual environments, creatives and audiences have increased access to a global entertainment market. Yet there remains an appetite for local content.

Local production was a key growth driver for Netflix in 2019, for example, as the video-streaming service heavily invested in content both specific to domestic audiences and for global distribution.

But how does a creator of culturally specific content navigate markets that may be unfamiliar with their local context? And what can be done to protect creators from uncomfortable or harmful encounters with international buyers?

Métis game designer Meagan Byrne is the founder of Achimostawinan Games and put her Indigenous Futurism *cyber noir* detective game to international markets. While some buyers were open to it, she said she has encountered ignorance, racism and a lack of understanding.

"While there were a few exceptions, most publishers I spoke with did *not* seem excited about the Indigenous aspects of the game and were not interested in accessing the North American Indigenous market," she said.

"A European funder [even] made comments about my name, looks, not being 'easily identifiable' as Indigenous, [and said he didn't know] that North American Indigenous people were still alive. Obviously the first [comment] was uncomfortable and the second was irritating."

Byrne said she would like to see the creation of an organization that would do the groundwork of educating potential international buyers and funders, acting as a shield to vet relationships before opening Indigenous digital creators up to potential harm and microaggressions.

"This is something that requires a committee of Indigenous digital media creatives to really dig down and lay out a set of objectives and key steps to improve this situation," she suggested.

Having heard many similar stories to Byrne's, imagineNATIVE, the largest presenter of Indigenous screen content in the world, commissioned *On-Screen Protocols & Pathways: A Media Production Guide to Working with First Nations, Métis and Inuit Communities, Cultures, Concepts and Stories* in 2019 and work in collaboration with the Indigenous Screen Office (ISO) to ensure the living document is used and consulted.

"Our hope with [the guide] and what we have seen is that creators can now send it to funders or potential production partners [in advance]," said Adriana Chartrand, who is an institute manager at imagineNATIVE. "Instead of having to [explain] yourself and your humanity, you can send this document and say, 'Please read this and then come back to me.'"

Established in 2017, the ISO has been developing a suite of programs to support First Nations creatives in the sector that would include legal advice, mediation, conflict resolution, mental health care and potentially even elder consultation services.

"I view so much of what the ISO now does as harm reduction," said Executive Director Jesse Wente, who is also the Chair of the Canada Council for the Arts.

"Frankly, the volume of microaggressions that we've been made aware of is enormous [and] is shocking even to me... It occurs with some of our senior-most creators and storytellers who are extremely experienced, which is disturbing and speaks very poorly to the way some in this industry approach these issues."

Wente added that due to a small staff (of three) and the fact that it "has never been properly funded since it was founded by the federal government," ISO programs have been slow to start despite being absolutely necessary. "These microaggressions are not so micro," he said. "A lot of [them] occur at the highest levels.

"My concern is that unless we see an evolution of best practices within the sector, sector-wide, when it comes to this, [we] will see a retreat of Indigenous storytellers... [microaggressions] actually make people want to leave and that would be a loss for our community, for sure, but it is an enormous loss for the sector and the country."

Most of what Wente calls the "right relations" work is being done domestically, he explained, as there is much less control over international and foreign productions, and suggested that a cultural competency budget line could help if it were made eligible to fund projects — much like productions did to offset the costs incurred by COVID-19.

Wente also suggested that the *On-Screen Protocols & Pathways* document should be applied to any project applying for tax credits.

"Indigenous peoples have done pretty much all of the heavy lifting, along with our Black cousins and our other racialized relations... not the main body of the sector. And if they want microaggressions to stop, they need to stop them," said Wente.

"Make it be clear that it is simply unacceptable, whether you are on an Indigenous set or not. It doesn't matter because, the truth is, all of these productions are being made on Indigenous land anyway."

Meanwhile, there has been some inroads as funding partners such as the CMF require use and an acknowledgement of *Protocols & Pathways* guide where applicable, and they have promoted it at international festivals such as the Berlinale in Germany and the Clermont-Ferrand Short Film Festival in France. Wente confirmed that major streaming partners have also received the document and are aware of the ISO as a resource.

But it appears there is more work to be done to provide necessary context and education internationally, thereby providing creators with additional support. There is also an opportunity to widen the scope and generate a broader base for this work, as clear parallels can be drawn between Indigenous media content and other screen content formats, as well as with members of other cultural communities.

"I would challenge the industry that if they see this as an issue and can recognize that this is an issue, and hopefully at this point they know it is, show us," said Wente. "Show us how important it is by doing something and making [things] safer for us."

The virtual production revolution has arrived

How games and special effects have changed production forever

Technological developments in the video game industry have made it possible to reduce the size of production crews, film safely in the age of COVID-19 and potentially cut costs in television and film production.

We took a look at the virtual production techniques expected to surge in popularity over the next few years.

Words

MAXIME JOHNSON

Illustration

LIN LUO

Decked out in a bounty hunter costume, Actor Pedro Pascal passed a huge screen in a large recording studio. Behind him is a futuristic set for *The Mandalorian* series, which realistically lights up and adapts with the moving camera. Instead of seeing the actor on a green screen, filmmakers access the final result on their monitors.

"Pre-production, production and post-production come together with virtual productions," said David Dexter, director of the Screen Industries Research and Training Centre (SIRT). The Ontario-based SIRT recently set up a virtual production studio to help Canadian directors get a grip on new technology.

Through the years, three kinds of technology enabled progress in virtual production: computers, screens (with camera monitoring systems) and video game engines.

Computers are now powerful enough to render photorealistic scenes in real time. LED screens provide enough size and resolution to show virtual sets behind actors; content can be adapted to camera movements. Game engines that usually design video games have been modified to the needs of filmmakers.

Sébastien Miglio is the senior director of product management at Epic Games, where his team has fine-tuned its software for use by film and television professionals.

"Many features, such as a tool for looking over a digital set with a virtual reality headset and positioning the cameras, have been added [to their toolbox]," he explained. "We also provide upgrade programs for industry professionals."

It now only takes a few weeks to learn the ropes in the virtual production world.

Tech to last

It is not only science fiction sets that benefit from virtual production, since the technology may also be used to recreate a forest or faraway city.

The ability to shoot outdoor scenes in studio is a huge asset during COVID-19. "We can send a small team on site to digitize the environment," said Dexter.

Virtual production not only solves the need to travel, which is costly (not to mention difficult in a pandemic) but this approach also makes it easier to film scenes again after the main shoot.

"It's possible to move from one set to another in just a few minutes," Dexter said.

> "Once directors start using virtual production, they don't want to go back to their old ways."
>
> JONNY SLOW
> CEO, Pixomondo

It's only a matter of time

Currently, few large studios are able to accommodate virtual productions. But in addition to Pixomondo and SIRT in Toronto, they can be found at MELS in Montréal and in Vancouver through a partnership with Animism Studios, ShowMax Event Services and The Sawmill.

Technology cuts production costs, although access to it calls for a hefty investment. "LED screens are the problem," explained Dexter. "These screens are usually rented for $50,000 or $60,000 per day."

Currently, virtual production technology is "mostly restricted to big-budget productions," agreed Jonny Slow, the CEO at Pixomondo, which opened a VFX production studio in Toronto in January 2021. He believes that it will only be a matter of time before large LED screens become cheaper so smaller productions can access them.

Until that happens, more affordable screens are available — like those used for outdoor events, for example — to project out-of-focus images while shooting close-ups.

Ontario's French-language education network TFO, for example, does not shoot programs in front of a large LED screen as that would cost too much money. Instead, many of its youth programs, such as *Minivers*, have been using virtual sets designed with Unreal Engine since 2016.

"We are the first broadcasters to have used game engines in television," said Cliff Lavallée, director of LUV studio services at TFO.

Unreal's 3D Marketplace shop is among the many tools available to take the load off small productions. Initially designed for video game developers, the shop increasingly provides affordable photorealistic objects for television and film, such as furniture and trees, and makes set creation easier and reduces costs.

"It costs peanuts to produce," said Renée Paradis, kids series producer at Groupe Média TFO. "It depends on what you want to produce [but] you can go simple and have a set, build it in a week, [test to] make sure it works and spend a month on [it]."

Beyond its cost, Slow believes that the COVID-19 pandemic has "created a perfect storm for adopting virtual production" and he predicted this technology will outlive the pandemic.

"Once directors start using virtual production, they don't want to go back to their old ways," Slow said, adding that the greatest challenge for virtual productions in 2021 will be finding available facilities as demand currently exceeds supply.

Virtual productions are still front and centre for bigger budgets but it takes only will and creativity for small-scale producers to join them in reaping the benefits of technology.

Dive deeper

READ

How Tech Used for 'The Mandalorian' and 'Lion King' Are Changing Hollywood, an article on No Film School

The Great Film Production Renaissance: Are You Ready?, an article from Richard Janes on Medium

Reopening Hollywood: How VFX Can Solve On-Set Social Distancing Dilemmas, an article on Deadline

Under COVID-19 Restrictions, Pre-Production and Tech Come under the Spotlight, a transcript from a Futur et médias podcast episode on CMF

LISTEN

Virtual Production Techniques for Film & TV: Sky Is the Limit, a Now & Next podcast episode on CMF

Virtual production: An ally to the environment

Words ZENA HARRIS, ANDREW ROBINSON, JENNIFER SANDOVAL
Green Spark Group

Director and Filmmaker Zach Lipovsky, Portable Electric's CEO Mark Rabin and Sustainability Manager Adrienne Pfeiffer are optimistic about the reduction of greenhouse gas emissions that can result from virtual production.

What are the sustainability benefits of virtual production?

LIPOVSKY: You can shoot multiple locations in one space without going anywhere. There are no locations and no set building, so there's no need to dispose of used materials. The biggest benefit is that the crew can stay in one place, reducing vehicle and air travel.

Carbon reduction was actually measured on the latest Disney+ season of *Mandalorian*, where the production shot half of the series on one Stagecraft that provided more than 60 backdrops. Some scenes were even shot in a small backlot.

The production saw a significant reduction of set construction and relocation costs, while cutting carbon emissions by 30 tons, which is the equivalent to the carbon sequestered by 39 acres of US forests for one year, according to the Environmental Protection Agency.

RABIN: This is a good example of where we've seen 100% greenhouse gas (GHG) reduction. And it's not just GHG. It's the particulates that you're breathing when you're around a generator [and] the noise that's constantly humming. So there are other features and benefits that come from having a clean energy source that's completely quiet.

What about the cost savings?

PFEIFFER: Just looking at travel alone, we can see a reduction of flights to bring crew to remote locations, often for a brief establishing shot. We also see reductions in accommodations, catering, ground transportation and shipping equipment. All these clearly have both a budgetary and environmental benefit. While we can't eliminate all set construction we can expect a 30–70% reduction of materials as a result of smaller sets.

Given the static location, [the second season of *Mandalorian*] I was also able to implement additional innovation by using an on-site compost digester to process food waste and practised the closed loop, circular model of keeping materials in the system, so, in this case food waste, digesting it and reusing it as soil (you can read more about that on page 82). Our on-site organics digester processed a total of 5,932 lb (2.966 tons) of food waste, avoiding 2.13 metric tons of CO_2.

The show also saw a savings of 70% less energy with the use of LED-powered lights versus the equivalent incandescent lights.

Safety and sustainability on set

It’s possible to have both

As production now requires preparation to focus on health and wellbeing, it has encouraged the industry to rethink wasteful processes and reconsider how they could incorporate more sustainable practices.

Can we create entertainment without harming the environment?

Words

ZENA HARRIS

ANDREW ROBINSON

JENNIFER SANDOVAL

Green Spark Group

Illustration

NANDITA RATAN

In the search for solutions, the film and television industry has leaned into "sustainable production," a term to describe the collective actions to reduce negative environmental impacts while contributing to the health and well-being of the community.

Production houses, studios, creative organizations, suppliers and crew are more engaged in acting sustainably than ever before. As a result, the list of resources and partners available to help productions reduce their environmental impacts keeps growing.

We are witnessing this green movement across Canada with programs like Reel Green in British Columbia and Manitoba, Ontario Green Screen and collaborations in Québec between major content producers and the CQEER (Conseil québécois des événements écoresponsables).

These sustainability-focused programs are necessary to weave together local systems, facilitate crew engagement and enable consistency in the industry.

Practically speaking, the OGS provides tools such as sustainable production training sessions to all film workers in Ontario, and builds community momentum around their forthcoming strategy.

Meanwhile, the CQEER has developed a list of green vendors available for production companies and offers webinars that celebrate eco-responsible productions.

"[Until recently], there has not been any recognizable, cohesive structure to sustainable production in the Greater Toronto Area," said Mona Rauf, an environmental supervisor in Toronto. "With OGS and more productions expressing a commitment to reduce their waste, there seems to be a clear movement towards [it]."

Similar efforts are accelerating on an international scale: the Creative Industries Pact for Sustainable Action is a global initiative launched with COP25 in 2019 to provide a common sustainability framework for industry organizations to endorse and work within.

To date, more than 20 Canadian organizations, and nearly 100 organizations globally, have signed the Pact.

That said, we've got a pandemic on our hands: we must address real health and safety concerns, as well as the health of our planet, to keep our industry running for years to come.

Cleaner sources of power

The entertainment industry's awareness of sustainability was growing prior to the pandemic, galvanizing around three key impact areas: fuel consumption, energy use and waste.

Fuel consumption is the largest source of greenhouse gas emissions on a production, regardless of size, as almost half of a production's entire carbon footprint results from fuel use required to transport equipment, people and materials to studios and locations, as well as in generators used to power sets.

In 2019, an estimated nine million liters of diesel fuel alone was consumed by productions in BC. Furthermore, the Screen New Deal — a 2020 report from the British Academy of Film and Television Arts and Arup Group — estimated that producing one average tentpole film generates 2,840 tons of CO_2e, which is the equivalent of over 8,700 passenger vehicles driven for an entire year, according to Natural Resources Canada's Greenhouse Gas Equivalencies Calculator.

As a result, reducing carbon emissions from burning diesel and other fuels is a primary focus for both productions and locations that have climate action goals.

Diesel generators remain the go-to source of mobile power on most film and TV sets, but it doesn't have to be this way. Innovative equipment and creative use of battery technology increasingly works to reduce diesel generator run time.

"Film productions are getting more efficient. Everything from LED lighting to green screen, to cameras," says Mark Rabin, CEO and founder of Portable Electric. "As LED lighting gets way better and more pervasive, energy use goes down for the same amount of light by 10 times, which bodes really well because then you start to use generators that are smaller [and] more efficient."

Vancouver is a battery power leader, with three industry suppliers keeping up with demand from local productions, as well as a partnership with the Reel Green's Clean Energy Committee to innovate on carbon reduction and electrify power sources.

In 2019, Vancouver city council also passed a motion to eliminate the use of diesel generators by the film, TV and event industries, offering a reduced price on permits if a production can demonstrate they are using clean power sources.

Taking a circular approach

There is an overwhelming amount of waste in the film industry and the challenge is highly visible: large sets are constructed, only to wind up in a landfill at the end of production to meet cost and timeline needs.

For decades, production has used a linear approach: materials enter, are consumed and subsequently discarded after brief use, which is not sustainable. Improving waste management motivated Kelsey Evans, a former production office staff, to start her own industry-specific recycling company, Keep it Green Recycling, in 2010.

Today, her waste management company services nearly every production in the Metro Vancouver area, setting up custom zero-waste and recycling programs to divert from landfills and reduce the carbon footprint.

Deciding between safety and sustainability is a false dichotomy.

"I am amazed by how the film industry in BC has stepped up and taken responsibility for their waste impacts," Evans said, adding that, since her company started a Material Reuse Centre, "we have diverted more than 399 tons of material."

While recycling plays an important part in waste diversion, it should never be the primary goal, since a high recycling rate indicates overconsumption and should be used as a last resort when material cannot be reused.

A *circular* approach reuses materials, minimizing waste and reducing the need to extract, produce and consume new ones. Sustainability Supervisor Haley Dolan used another approach on a recent Netflix production by focusing on donating materials:

"[We sent] food to Food Rescue and Feed it Forward, we've also donated leftover paint and supplies through Ready Set Recycle," she explained. Useful props and costumes will go to nonprofits like New Circles, which help new immigrants to Canada, as they "are doing our best to avoid putting anything into the landfill."

Adapting for safety

As COVID-19 guidelines are established, there is concern that sustainability efforts in the industry might be sidelined. As single-use items are seen as a preventive safety measure, plastic water bottles and disposable cutlery will be encouraged, while additional vehicles to transport crew could drive up carbon emissions.

Deciding between safety and sustainability is a false dichotomy.

"Single use" does not mean that a product must be made from plastic, as compostable alternatives are available. And a recent statement issued by health experts from over 18 countries confirmed to Greenpeace that single use plastics are not any safer: "Reusable systems can be used safely by employing basic hygiene." they concluded.

> "Film productions should be rewarded if they can build [sets] in a reusable fashion. Waste reduction needs to be incentivized."
>
> HALEY DOLAN
> Sustainability Supervisor

The pandemic forced film and TV productions to adapt. In doing so, it has created an opportunity for industry professionals to rethink entire systems and approaches to their work.

Touchless bulk water systems are now used in productions to ensure access to safe water stations and reduce plastic waste; aluminum cans are used, which are infinitely recyclable.

Reel Green and the Producers Guild of America's Sustainable Production Alliance created guidelines for operating safe *and* sustainable sets in their white paper: A Greener Return to Sustainable Production.

Green Production's Return to Work Guidelines also outlines ways to develop healthier and more resilient workspaces.

When filming was paused, crew members were solicited for feedback through various forums, including a Reel Green survey about what the BC film industry would like to see changed once productions resumed.

Overwhelmingly, a call for healthier, more efficient workspaces and a reduction of negative environmental impacts were top of mind.

Digital workflows (and other hacks)

Although not every production is there yet, we're seeing determination to operate more sustainably within COVID-19 guidelines. And one of the most apparent transformations is "going digital."

Digital apps such as Scriptation, Shot Lister and Scenechronize are used to reduce the amount of paper circulating through different hands. Less paper is an indirectly positive outcome of COVID-19 but, once the pandemic is behind us, there's no reason to return to former rates of consumption.

As in-person meetings are held online, the industry has also demonstrated that a digital approach is possible to reduce travel-related emissions.

But on the other hand, some guidelines present challenges to sustainable practices: "COVID PPE has created an obscene amount of waste. Everything is coated in plastic and we are going through several masks each day per person, which is costly," said Dolan, who added Terracycle PPE recycling bins to her set that were also expensive.

Environmental Supervisor Mona Rauf, meanwhile, diverted PPE from a recent project by bringing it to a facility that converts the waste to energy.

Dr. Adam Lund, a medical director of Odyssey Medical, has been very involved with developing COVID-19 guidelines for film productions in BC. He sees a parallel between the goals and challenges of environmental sustainability and the resilience of the individuals that make up the film industry.

"[Sustainability] initiatives support long-term health for our entire planet," he said. "[Making] decisions that will protect future generations is paramount... the daily practices may not appear to pay off today but they are the essential, long-term investments we need."

Gaming sustainably

Beyond film and TV productions, the gaming industry is also becoming more green. Organizations like Playing for the Planet Alliance support carbon reduction and environmental awareness measures.

A media mindshift

As today's climate crisis and its related impacts are growing at alarmingly rapid rates, "It would be great if there was more accountability in each municipality and among corporations," said Dolan.

"Film productions should be rewarded if they can build [sets] in a reusable fashion. Waste reduction needs to be incentivized."

Despite the challenges ahead, the past year has demonstrated that the film and TV industry will rise to the occasion as we continue to evolve. "We're creatives," agreed Rabin. "Let's be creative, tell great stories and not leave a huge footprint on the planet."

With COVID-19, the industry witnessed collaboration and engagement unlike anything seen before — and there is an appetite to use this moment to transform future production methods and practices.

The more the industry actively seeks out sustainable alternatives, the more partners and solutions will be found. A green shift is happening across Canada and it's getting noticed.

As more productions invest and plan for safe, healthy and sustainable production, the entertainment industry will see significant reductions in carbon impacts necessary to ensure that it continues to thrive for years to come.

Dive deeper

READ

Sustainable Production In A Post-Covid World, an article on Little Black Book

A Greener Return during COVID-19, environmental sustainability guidelines on Creative BC

A Screen New Deal - A Route Map to Sustainable Film Production, a research report on albert

The Many Ways Video Game Development Impacts the Climate Crisis, an article on The Verge

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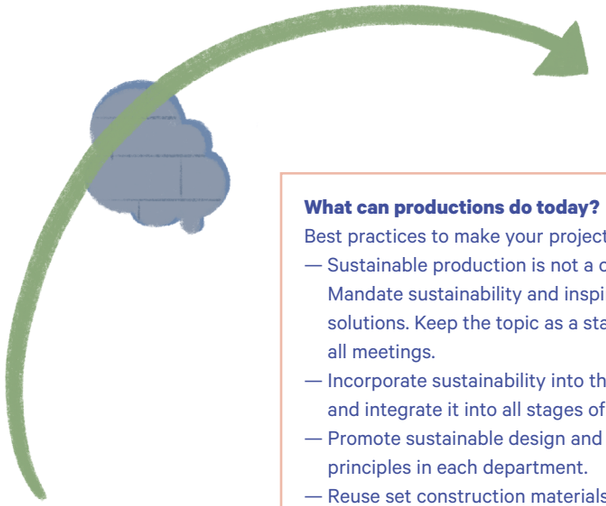
Staying eco-conscious on set during Covid-19, a Now & Next podcast episode on CMF

How to Make Audiovisual Production Environmentally Sustainable, a Now & Next podcast episode on CMF



What can productions do today?

Best practices to make your project safe and sustainable:

— Sustainable production is not a one-person job. Mandate sustainability and inspire the crew to seek solutions. Keep the topic as a standing agenda item for all meetings.
— Incorporate sustainability into the budget and integrate it into all stages of a production.
— Promote sustainable design and circular economy principles in each department.
— Reuse set construction materials to keep them in the system.

— Fuel and energy
  — Consider using VFX technology to reduce locations (this will also result in significant cost savings).
  — Use distributive power on set by using alternative sources to fossil fuels/generators.
  — Tie into the grid whenever possible.
  — Fly less.

— Hold meetings via teleconference.

— Materials and waste
  — Reduce single-use items as much as possible; reusable water bottles are still an acceptable and safe option.
  — Substitute plastic for 100% compostable (wood fiber) products.
  — Source local and eco-friendly products and services.
  — Reuse and recycle.

Canada's audio-visual production industry adjusts to keep the cameras rolling during the pandemic

A new on-set reality

Aside from lost or postponed contracts, additional costs for production companies and an imposed pause in the spring of 2020, the artisans of the Canadian audiovisual industry have nonetheless managed to get some good out of the COVID-19 crisis.

The constraints of COVID-19 led to creative workarounds and drove forward new conversations about consent on sets that are now under extremely strict health guidelines.

A handful of creators across Canada spoke about their experiences.

Words

CATHERINE DULUDE

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SHAUNA TOWNLEY

Beyond the guidelines put forward in many provinces and territories through collaborations between industry and government, producers came up with health protocols for teams to bring sets back to life. Many projects hired COVID-19 marshals to ensure health protocols were observed, manage personal protective equipment and clean the premises.

But preparation takes time and logistics are costly. Manitoba-based production company Eagle Vision raised their budgets 8% to 10% to comply with health guidelines. “When we cut scenes, we wait for actors to mask up before we approach them,” explained Producer Kyle Irving. “This takes about 20 minutes per day, meaning we need more days of filming, at a cost of approximately $300,000 per day.”

Nicole Loewen was the COVID-19 supervisor on the set of their project *Burden of Truth*, working in the accessories department. “During shooting, it was our responsibility to clean accessories and cutlery many times during scenes where actors were having meals,” she explained. “We had lots of preparation time before shooting to ensure everyone’s safety,” she said.

Health is also front and centre in the makeup department, which came at a cost. Montréal-based Makeup Artist Sandra Blanc worked on the set of *Un vrai selfie* for Unis TV, a French-language channel. Blanc had to rework her entire practice to ensure the safety of those who sat in her chair, setting her back hundreds of dollars.

“I bought alcohol to clean my products and even a small UV machine to disinfect anything metal. I bought more brushes. Before COVID-19, we dry-cleaned each brush. Not anymore. I use one brush per person,” Blanc said.

The make-up routine changed, too, as she had to ask actors to limit conversation in order to reduce the risk of transmission. “This is hard for me, as doing someone’s make-up is a time for relaxation and sharing your private thoughts. Unfortunately, we can no longer talk to each other. It’s such a weird experience,” she said.

Lindsay Somers, an intimacy coordinator on many film sets for Netflix productions in Toronto, helps production teams to facilitate scenes between actors in close proximity.

“Prior to COVID-19, we mostly focused on nudity, intimacy and simulated sex but kissing was often overlooked. Now everyone understands that kissing is a high-risk activity and that we need to have discussions with actors [and] obtain their informed consent to ensure they are fully aware of the role they will play,” said Somers.

Some choreography had to do away with kissing altogether.

Somers noted that the industry's attitude toward consent has changed over the past few months, as her role is valued more than ever before by both producers and the medical community. She hopes that intimacy coordinators become ever more present in the coming years.

It takes a village

Creatives in the audiovisual industry have shown resilience and innovation by putting their (immense) talents to good use.

Public educational network Télé-Québec commissioned two series during lockdown called *Les Suppléants* and *L'école à la maison*. "We got hold of existing sets and used an empty production office to shoot episodes because everyone else was at home," said Director Sébastien Hurtubise, who produced 100 half-hour programs within 12 weeks.

"We walked them through each episode. We really took the office by storm!"

Methods also needed to be reworked to expedite production. A makeshift control room was set up in the kitchen so pre-editing could be done live. Hosts were given teleprompters so they wouldn't have to memorize texts. Team creativity made each project successful.

"We had to work with multitaskers," Hurtubise said. "We used the technicians a lot. The hosts would call out to them instead of a live audience. It became a running gag, the technicians' choir! We found a way to use what we had."

Scriptwriters also had a part to play in following rules and pushing production forward, said Irving: "We asked [them] to create outdoor scenes whenever possible and be mindful of how many actors were in each scene."

The Aboriginal Peoples Television Network's Indigenous Day Live (IDL) 2020 summer solstice celebrations were postponed in June, but after much hesitation, the IDL crew found another solution: a winter solstice celebration. Five one-hour episodes aired during the holiday season.

"I had the benefit of working in the wild and wonderful Atlantic bubble," said IDL 2020 Production Manager Heather Frantsi, who saw through concert production in Halifax. "It was challenging at times but work was really easy. A local team and a number of local artists had to be hired."

For example, a local transportation company chauffeured artists to sites, reducing the risk of infection among team members.

"Moving forward, I'll definitely continue subcontracting [these tasks] as this will take a load off the production assistant and award contracts to local companies," she said.

In Alberta, Productions Loft Coproducer Marie-France Guerrette shot *Cowboy Urbain* for Unis TV over the summer. The production team cancelled out-of-province shoots, opting instead for local ones.

"Actors undoubtedly showed hesitation when we resumed shooting [and] we had to reassure them with the protocols in place," she said. "If actors didn't feel comfortable with the protocols, we had to tell the broadcaster to change plans."

> Who would have thought that a health crisis would bring consent to the fore?

Future hopes

No one we interviewed could deny that they were excited to get back to work.

Even after the coronavirus is contained, some methods and practices implemented during this difficult time will remain in place, as creatives learned many valuable lessons.

And who would have thought that a health crisis would bring consent to the fore?

Of course, there's also the sense of pride that comes with belonging to an industry that is good for the soul. Here and abroad, Hurtubise is happy to see audiences increasingly enjoy audiovisual content during the pandemic.

"It is often said that [the industry is] the first to go in a time of war [and] although we're not saving lives, we have definitely made a difference during this difficult time.

"During a crisis, people need to take their mind off things — suddenly, our job became important."


Face Shield

Empowering media makers

We have always known that a great story can move mountains. What we did not realize was that the same story could also help get us through a global pandemic.

2020 was a year where we rediscovered the vital role of content creators.

Rising above the chaos and confusion, we became hooked on images, plots and characters. Creative media makers helped us weather the storm. And screen-based media was just what the doctor ordered (to stave off boredom).

As almost every facet of culture came to a grinding halt last year, there was an opportunity to question the very foundations of our business, forget what isn't important and prioritize what is. The pandemic, alongside major social movements, shone a spotlight on systemic racism and other forms of discrimination in the screen-based industry.

But will this moment turn into action and lasting change?

This pandemic put cracks in our ecosystem into plain view and revealed the inequities experienced by many in our industry. It is time to welcome in diverse voices, tell different stories and showcase them under a new light.

After several months of lockdown, audiences are looking for something else, developing new reflexes, trying new things and leaning into their discomfort of the unknown.

Not only do diverse stories provide an outlet to escape, but they also especially make it possible to connect with others.

We are inspired by the creators who continue to create images that build bridges.

CATHERINE MATHYS
Director, Industry and Market Trends

CANADA
MEDIA FUND

Racial equity and the media industry

Creating inclusion on screen and in life

Canada is one of the world's most culturally mixed countries, yet the diversity of Canadian audiences is not represented in front of or behind the camera.

Individuals from racialized and other underrepresented communities face systemic barriers, biases and stereotypes at every level in this industry, which is why the Canada Media Fund has hired Diego Briceño and Tamara Mariam Dawit to co-lead its Equity and Inclusion strategy.

Following years of thinking around inclusion, serious internal reflection and a need to take action on the heels of racial reckoning in 2020, CMF created a strategy on equity and inclusion with a few key objectives.

The goal is to create transformation by increasing access to programs, using an equity and inclusion lens to inform corporate decisions, implement data collection and build the competencies and composition of the internal team in order to serve underrepresented communities.

Here's how Briceño and Dawit plan to create opportunities for underrepresented communities to participate in and engage with the CMF more deeply in 2021 and beyond.

Words

ROSE CARINE HENRIQUEZ

Photos

104, 114-1

MARCUS OLENIUK

108, 114-2

ROSE CARINE HENRIQUEZ

The CMF Equity and Inclusion co-leads know that a racial representation lag in audiovisual productions is responsible for perpetuating inequalities in this field. As many voices come to condemn racism and inequality, led by a global Black Lives Matter movement, it is clear that we are living in a moment that questions the legitimacy of our systems and institutions.

Significant work remains to be done in the face of systemic discrimination and the CMF is no exception.

> **"The challenge we face is to move toward a system that is easily adaptable and can take in new ideas, different voices and truly weave them into the fabric. It is our goal to be flexible in the face of fluctuation and cultural, media and technological shifts."**
>
> DIEGO BRICEÑO
> CMF Equity and Inclusion strategy, Franch-language Market Sector Lead

Building solidarity

Born in Colombia and based in Montréal, Briceño leads the CMF's Equity and Inclusion strategy for the French-language market sector. Working in the media for the past 20 years, his many projects include documentaries, fiction and interactive works. His wish to implement solidarity mechanisms in the media environment is similar to initiatives he led in the past as co-founder of the Makila.tv incubator co-op in order to bring together creators, industry and audiences.

"The challenge we face is to move toward a system that is easily adaptable and can take in new ideas, different voices and truly weave them into the fabric," he said. "It is our goal to be flexible in the face of fluctuation and cultural, media and technological shifts."

Briceño believes that problems in the system will be found by analyzing data to remove the barriers to entry racialized and underrepresented producers constantly face, which include access to networks, decision makers and funding organizations.

Dawit, who leads the CMF's Equity and Inclusion strategy for the English-language market sector, is a Toronto-based producer and director who hails from Ethiopia, with a track record that illustrates a clear social commitment. Her creative production in music, documentaries, TV series and drama films is rounded out with experience working as an advisor in organizations such as the European Union National Institutes for Culture (EUNIC).

"We're working towards being more proactive when it comes to equity and inclusion principles, ensuring they are woven into all areas of work within the CMF, from programs to policies, staffing to funding initiatives," she said.

Getting behind closed doors

The *2020 Status of Canadian Black, Indigenous and People of Colour in Canada's Screen-Based Production Sector* was a study commissioned by the Reelword Film Festival and Reelword Screen Institute that offers some insights regarding access to employment in the English-language market. Through surveys and interviews, it determined that decision makers falsely and unconsciously presume that very few qualified professionals are to be found in racialized communities.

Dawit agreed that it is difficult for Black, Indigenous and People of Colour to seize the same opportunities as white people in the industry since they have a hard time with the first step — getting themselves known.

"[I remember] the first workshop I took part in to develop a project as a full-time producer [and] the amount of content my white peers released and the opportunities they have had are much more. The demand for their work is completely different," Dawit said.

According to Briceño, decision makers are used to having discussions with producers they have relationships with and trust, making it difficult for anybody outside that circle to gain access to project development or funding.

"Joining existing professional networks or building a new network is often time-consuming and painstaking for [People of Colour] because connections are made with a sturdy cultural and identity background acquired during youth," he said.

While databases exist for showrunners to find diverse industry talent (see page 127), getting into the right circles requires much more work than putting your profile in a directory.

"I've always plowed ahead with my projects, even the oddest of projects, knowing that the world is greater than a small group of decision makers or a specific network," advised Briceño.

Dawit also believes broadcasters and distributors have a false perception of what Canadian content should look like. Currently, that content is white and targets a predominantly white audience. "This is part of rewriting narratives [about] the type of content that could be successful," she said.

"Yes, there are audiences who want to watch Indigenous TV shows, films about a Black family and sitcoms about Chinese Canadians. These audiences do exist. People do not only watch content about their own ethnic groups."

Giving creatives of colour more control

In Dawit's experience, artists from diverse backgrounds often do not have full intellectual property rights to their works. She herself had problems with her latest film *Finding Sally*, even though she was the writer and director. "If you do not have rights to your film, you have no control over distribution, sales, creative results or marketing."

This predicament also limits access to funding sources when eligibility criteria include the ownership of past work.

Dawit said she was disheartened by the process, which included many microaggressions and a trivialization of her role in a project she created. "This negative situation encouraged me to do the work I am doing for the CMF — to ensure that the next Black woman will not face the same barriers and systemic racism as I did."

This phenomenon is specific to and upsetting for People of Colour because "only seasoned professionals take economic risks with new projects. Of course, most of these businesspeople, rights owners and large corporations are white English and French Canadians in Québec and, until recently, heterosexual men," said Briceño.

A greater inclusion of underrepresented businesspeople and a fairer system for shared ownership and revenue are some solutions to guarantee better opportunity for creatives of colour in our industry.

> **"We're working towards being more proactive when it comes to equity and inclusion principles, ensuring they are woven into all areas of work within the CMF, from programs to policies, staffing to funding initiatives."**
>
> TAMARA MARIAM DAWIT
> CMF Equity and Inclusion strategy, English-language Market Sector Lead

In short, existing structures need to be transformed.

This is why the CMF is also taking an initiative internally: the team and culture inside the CMF, including staff, managers, board members, jury members, contractors and suppliers, must reflect the values embodied in this strategy.

Calling for a data-driven process

Briceño and Dawit agreed that the current state of affairs is poorly documented and the first step for the CMF will be data collection.

"Before solving a problem, we need to know what the problem is. This is where having an objective perspective comes in. We cannot be guided without data. It's like writing a documentary: Personal accounts are fine, but we always need facts that can be validated by statistics. That is how we get closer to the truth," Briceño said.

Dawit added that "examining data for the first time will not be a pretty sight but if we do not have that period of self-reflection, we will not know what position we're starting from and won't know how to measure change."

As for data collection in Canada, the Toronto-based Racial Equity Media Collective, a non-profit founded in 2019, advocates for equity in the film and television industry. They are currently analyzing available data from public funding organizations in Canada that will be released in 2021. Very soon, we will have a better portrait of the situation and will shed light on the areas that urgently need improvements.

Aside from a lack of access to dependable data, the collection process itself has its challenges — one big example is gaining respondents' trust.

"Some groups feel that they have already provided enough information to no avail [and] they may be suspicious of new data collections," Briceño said. "The issue of confidentiality is always present, as we need to make sure that the data [that communities] provide will be used for the right reasons and not against them."

To help the industry move forward with shared approaches, the CMF is working with Telefilm and convening funders and associations throughout Canada to determine best shared practices, approaches and policies per the collection of this important data sets from applicants. It has also committed to work with BIPOC organizations to establish data definitions and best practices for data collection.

Having a baseline assessment of who the CMF is reaching, funding and supporting to date and moving forward will enable its Equity and Inclusion strategy to be evaluated, improved and monitored to demonstrate change.

Calling everyone in

As the strategies and beliefs in the fight for equality are as diverse as the Canadian communities living coast to coast to coast, so are the challenges to achieve equity.

For much of our history, an emphasis on *differences* has dominated the conversation rather than highlighting and celebrating the unique diversity of each language, culture, province and territory.

While Canada is blessed with a number of proud, distinct groups, there is nonetheless a noticeable gap in representation of cultures that cannot be overlooked. During the CMF's first consultation with racialized francophone producers, the French-language media in particular came under fire for this discrepancy, lagging behind the rest of Canada.

Radio-Canada published a lengthy study by Angy Landry in 2019 examining Québec's 10 most popular TV series. Breaking down casts by role categories, the study concluded that the series were far from representing the diversity present in the population. Only *two* of 894 roles were played by non-Caucasian actors and they were not title roles as per the UDA (Union des artistes) definition.

"It is hard to open doors, as television stations and associations that are chiefly white seldom reflect the wants and needs of People of Colour," said Briceño. "We do not see the same level of discussion, commitment, or progress [on diversity] … The English-language community is better organized and has more structured organizations with experience of the concerns of racialized groups.

"Being a racialized producer myself in the context of Québec, it was surprising to realize how little I had discussed both systemic and internalized racism with my fellow colleagues until now," he added. "We [are] all living the same difficulties or seeing the obvious lack of diversity on our screens, often complaining with deep frustration, but taking it for granted.

"Very few of us were thinking about or, even less, taking concrete action to solve the issue."

Language is also a gatekeeper to progress, as terms like "systemic racism" are still up for debate in Québec. "Francophones embrace a culture with its own distinguishing characteristics. Terminology will always be the first pitfall in this discussion."

Nonetheless, he still believes that change is possible, as Québec's strength lies in its community life, ability to collaborate and make concerted efforts. The situation in Québec is just one particular example of the fight to find balance and representation among many cultural differences across the country.

Despite the challenges of the current situation, the events of 2020 have certainly raised both awareness and public consciousness both outside and inside our industry, and in both English and French Canada.

“I believe change will come in 2021, beginning with the tabling of the new *Broadcasting Act*. There are quite important proposals for the future of the CMF as well,” said Briceño. “These reforms will force us to rethink the way we make, show and fund media, so it’s a window of opportunity for those of us working towards a more inclusive system.

“Everyone is aware that we are living through crucial times.”

Last amended in 1991, the newly drafted act is projected to promote greater equity and inclusion. But in practice this remains to be seen, said Dawit, given that previous legislation had addressed similar issues.

“The previous act was meant to underscore the importance of content from and about racialized communities in Canada but that really wasn’t enforced by anyone. We will see if the new act will be similar… I believe this is the type of change that is key,” she said.

Open minds

At the moment, there is a call for action on racial diversity and so the goal of the CMF is to fight racism along with homophobia and discrimination based on disability, sexual orientation, language and religion. Dawit believes that more outreach will be essential to understand different needs and difficulties of these groups. So even if the work so far has focused on racism, the CMF has also begun to look at access in other areas.

“*Intersectionality*, [or the interconnected nature of social categorizations that overlap to create systems of discrimination and privilege] is extremely important for us, as we are aware that groups and communities intersect, mingle and interact with each other,” Briceño explained. “Intersectionality gives us a more nuanced picture of those individuals who, to varying degrees, have difficulty being heard and funded.”

As we enter 2021, the CMF is at an inflection point. While the organization is cognizant that it doesn’t have all the answers, it is committed — with the help of the Inclusion co-leads — to do the work and take action, to seek out and use data, and to fight for more inclusion in our industry.

The plan is to continue to check in with and consult with communities who benefit from the program, monitor progress, garner feedback and course-correct as needed, said Dawit. “The way to make our systems resilient is by listening, learning and improving hand in hand with all those who make it happen.”

“As we realize we all share similar goals,” said Briceño, “it [will become] easier to be more empathetic and act in solidarity, which is the basis of any equity strategy.”

Closing the opportunity gap

Why media diversity is the future of the industry

Both in Hollywood and at home, diverse directors, writers, producers and film critics have been calling for media representation.

Projects like *Diggstown*, *Beans*, *Transplant* and *Kim's Convenience* prove that the stories are here. International blockbusters like *One Night in Miami*, *I May Destroy You* and *Small Axe* prove that an audience is there.

And clearly, there is talent. All that is needed is access and support.

For the screen-based industry to grow and thrive, access, guidance, opportunity and visibility must be given to more diverse communities and storytellers.

Here's how some Canadian organizations plan to claim their place.

Words

CAROLYN HINDS

With files from

LAURA BEESTON

Illustration

NITI MARCELLE MUETH

In the summer of 2020, Black Canadian filmmakers called upon the industry to acknowledge the systemic racism, barriers and discrimination that they face — and the Black Screen Office (BSO) was born.

Joining organizations such as Reelworld Film Festival, imagineNATIVE, BIPOC TV & Film, and others also working towards equity, the BSO board of directors created a clear vision of the change they wish to see in the industry.

"We will support programs and initiatives that increase the existence, visibility and celebration of Black creators and creations. We want to ensure that there is as much access, money and support to make great Canadian Black content," said Executive Director Joan Jenkinson.

Inspired by the Indigenous Screen Office (ISO) established in 2017, the BSO will be an advocate on behalf of Black filmmakers across Canada with broadcasters and agencies.

The public response has been positive and inspiring so far, said Jenkinson, adding that those in the decision-making positions are enthusiastic about their work.

"We've had no trouble gaining access," she said. "Broadcasters and institutions have said they are making changes [so] we will continue to advocate and hold them accountable. We will be in constant conversation with the gatekeepers, attend monthly meetings and continue to be a part of the conversation."

But the BSO isn't just a go-between for creatives and networks. The intent is to make sure aspiring and emerging Black creatives, as well as those who have been in the industry for years, know they have an ally.

As BSO Director Damon D'Oliveira explained in an interview with Playbackonline.ca, "we started doing some research [and] 24% of Canada's population are Indigenous and People of Colour.

"What we were able to identify is that in the 58 years of broadcasting on television in Canada, there have been *five* shows that have been commissioned by a major network that have been led by Black creatives."

So where is the representation on screen?

> **“What we were able to identify is that in the 58 years of broadcasting on television in Canada, there have been five shows that have been commissioned by a major network that have been led by Black creatives.”**
>
> DAMON D’OLIVEIRA
> Black Screen Office Director

When talent meets opportunity

“One of the first things the BSO [will do is] collect race-based audience statistics because, at the end of the day, the ratings data that broadcasters get does not capture racialized audiences in any way,” said Jenkinson.

“The data that the broadcasters are making their decisions on is based on largely white populations who have the meters in their homes to be counted. As far as ratings go, we are virtually invisible.”

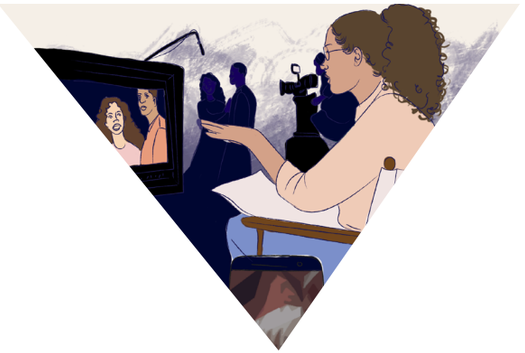
Data collection (as we learned on page 103) is also important for who is watching and can aid writers, directors and producers in creating pitches for networks and streaming platforms.

And for young people especially, visible representation is key to inspiring confidence that their dreams can become reality and that their stories matter.

Deanna Wong is the executive director of Reel Asian, which created a summer film mentorship program called Unsung Voices to connect early-career filmmakers with those who have produced and screened films at the festival.

“It gives them a chance to take their story idea from start to finish,” explained Wong. “They learn story editing, cinematography, post-production, all of the aspects of creating a film, and then they work on their projects all summer, under the guidance of the Unsung Voices coordinator and the various mentors.”

A benefit of having dedicated organizations serving their specific community is that they understand the challenges filmmakers face because of specific cultural beliefs and traditions.



“We increased the age [limit] from 19 to 29 in recognition of the fact that film is a difficult industry to break into and also [because] film as an artform is something that, for [many with] Asian backgrounds, their parents do not encourage to pursue as a career,” Wong said.

“People may already have started their studies or even their careers in some other path, but they have had an idea that they’ve always wanted to turn into a film. It’s free, so there are no barriers.”

The Being Black in Canada Program, which is the largest mentorship initiative dedicated to Black filmmakers across the country, is like Reel Asian in that its emphasis is placed on showcasing the talent of a specific racial group.

This allows each community to see stories from people of the same racial, ethnic and cultural backgrounds that they can relate to, which is not necessarily the case at international film festivals.

Actor, activist and philanthropist Fabienne Colas is proud of the ground her eponymous foundation has gained in funding the program since it was founded in 2012.

In the 2019 cohort, 15 emerging Black filmmakers benefited from mentorship and training, said Colas, creating their first documentaries and short films. “They were accompanied by professionals on the ground. In the end, we toured throughout the country, going to Black film festivals in Montréal, Toronto and Halifax… this is a career-changing program.”

The cohort’s work can also be found on TeleQuebec.tv and CBC Gem.

Colas is excited and hopeful for the future, especially as streaming services such as Netflix Canada provide new opportunities that didn’t exist for weren’t being offered to Black, Indigenous or Creatives of Colour just a decade ago.

She said working with Netflix was a dream come true. “And here we are now, [empowering,] creating and training the next generation of Black filmmakers.”

Adapt or die

With the current interest in more diverse projects from major networks, there is hope that this access and interest will extend to Black, Indigenous and People of Colour in order for them to create stories here, too.

But for this to happen, the industry needs more than just public interest in diverse storytelling.

On an episode of the CMF podcast *Now and Next*, Reelworld Film Festival Founder and Actor Tonya Williams (who has been working to solve diversity issues since the seventies) explained what's needed in the long term:

"We've got a lot of racially diverse writers [and directors] who become producers out of necessity," she explained, "but we need to be creating producers who can guide these artists who can build these relationships with these writers, who can take these projects and take them to the next level.

"We know it takes 10 years to get a project off the ground, so you need a full year of really working with mentors. [...] They have to go through the whole process of, how do you get that to a broadcaster? How do you get into the development process?"

After years of looking for a partner for this initiative, Reelworld teamed up with Bell Media in September 2020 to create a 12-month program to cultivate a new generation of diverse producers.

Another project Williams spearheaded to get more representation on screen is a mentorship program with Meridian Artists for those who are adjacent to it: casting directors, agents and managers.

"It's almost embarrassing how little representation we have in those areas," said Williams. Called the Meridian Artists Apprenticeship Program, it will offer a four-week paid hands-on opportunity to learn about this facet of the business.

For any of these changes to be long lasting, Jesse Wente, who is executive director of the ISO and chair of the Canada Council for the Arts, added that these initiatives need security and permanent, year-over-year funding to support creators and producers.

"In a world where unique, visionary storytelling is still the centre of our sector, we have to acknowledge that [the success the market is looking for] comes from many different communities," said Wente.

He noted how major companies and Hollywood studios have "abandoned this notion" and instead commission works based on the algorithm or what has worked in the past.

"We've seen a remarkable de-investment in original IP in the last 20 years, very much to the detriment to the sector overall," said Wente. "Frankly, the reason why some producers are having difficulty connecting to the audience is because [they] are chasing something that no longer works."

But Wente was quick to add he still has "optimism in math [and] how it relates to demographics of an audience that has already rapidly shifted in the past five years and is only going to continue to [do so].

"In a world where unique, visionary storytelling is still the centre of our sector, we have to acknowledge that [the success the market is looking for] comes from many different communities."

JESSE WENTE
Indigenous Screen Office
Executive Director and Chair
of the Canada Council for the Arts

"If you think you can continue to produce the content that you always have and in the way that you always have while your audience radically shifts, you have not studied history," he said. "The math is indisputable."

The only way to make shows that become cultural phenomenons like HBO's *I May Destroy You*, Wente added, is by finding and empowering creatives like Michaela Coel to tell her story.

"And you do not find that person searching under the same rocks that you have lifted for 30 years — you find that person by lifting a new rock in a different neighbourhood."

Showcasing and supporting the voices that emerge from the ISO, BSO, Reelworld, Reel Asian or the Being Black in Canada Program is what he believes it will take for the industry to reorient itself. To not adapt alongside new audiences and engage more diverse demographics with fresh voices and perspectives is to ensure obsolescence and irrelevancy.

"I firmly believe that it's storytelling that transformed this place and it is storytelling that will transform it again," Wente said. "The difference will be *who* is telling the story. That's what all of this is about."

Dive deeper

READ

How the industry is moving from consultation to action on diversity, an article on Playback

Inside the creation of the Black Screen Office, an article on Playback

Viewer demand for TV shows with diverse casts outstrips supply, an article in Los Angeles Times

LISTEN

The Time Is Now: Achieving On-Screen Racial Diversity, a Now & Next podcast episode on CMF

Breaking On-Screen Stereotypes from the Inside Out, a Now & Next podcast episode on CMF

WATCH

How to Bring About Lasting Diversity and Inclusion in the Canadian Entertainment Industry, a roundtable discussion on Content Canada

No more excuses
Resources for a more inclusive industry

Words LAURA BEESTON

For years, Canadian stakeholders have been pushing for more diversity in television and film casting and staffing. And for years those in the industry made excuses, saying, "I'd like to hire more diverse talent but I don't know where to find them."

There is no room for excuses in 2021. Here is a list of various talent databases and resources that have emerged across Canada over the past few months.

Accessreelworld.ca

The Access Reelworld Directory makes it possible to search for Black, Indigenous, Asian, South Asian, Middle Eastern and Latin American talent in Canada's creative industries by location. On an episode of the CMF podcast *Now and Next*, Reelworld Film Festival Founder and Actor Tonya Williams talked about the database and why her mission is to shine a spotlight on racially diverse talent, on and off screen. "Data collection actually drives everything," she said. "There's really been an awakening this year... people now get it."

Diversity.actraonline.ca

Offered at no cost to the Alliance of Canadian Cinema, Television and Radio Artists (ACTRA) union members, this is an online searchable database of diverse professional talent that's available to partner agents, casting directors and producers.

Filmincolour.ca

Film in Colour is an online tool intended for users to discover, hire, and collaborate with film/TV industry professionals of colour. Launched in January 2020, this tool was originally built to showcase Canadian talent but has since expanded to include crew and other industry professionals from all over the world. It was founded and created by Canadian Filmmaker Pavan Moondi, who said he was inspired to act after seeing a pattern of "PR-speak" co-opt the word "diversity" and use it to describe gender parity, while leaving out creators of colour. "We have to make it really easy for people to help the cause, and really hard not to," Moondi told *The Globe and Mail*. "Otherwise, they'll just keep kicking the can down the road, as has been the case for the last few years."

Hirebipoc.ca

Describing itself as an industry-wide roster of Black, Indigenous and People of Colour (BIPOC) crew and creatives working in screen-based industries, the HireBIPOC database is a web portal with a mission "to eradicate systemic racism in the Canadian media landscape." A resource whose foundational partners include Bell Media, CBC, Corus Entertainment and Rogers Sports & Media, HireBIPOC's objectives include shifting the thinking and practices around hiring, investing in the BIPOC community, and getting more BIPOC hired.

Nationalindigenoustalentdatabase.ca

Created by the Aboriginal Peoples Television Network (APTN), this resource aims to connect various production companies, agencies and individuals with Indigenous screen industry talent in Canada. Creating a network for Indigenous film and television projects, companies, and employees, its goal is to "generate a list truly reflective of the talent and depth of our expertise and capabilities."

Evolving approaches to media narrative

Storytelling today is limited only by access to an audience, available technology and the creator's own skill and imagination

As the lines between linear and interactive experiences blur, audiences, storytellers and the narratives that bring them together are challenged to use media in new and interesting ways. Time, money and attention is increasingly spent online, making the digital space prime real estate for storytellers and increasing its importance significantly.

Words

ANNELISE LARSON

Illustration

JULIEN POSTURE

"Digital spaces are just as essential as any other sort of public space or public service," said Claris Cyarron, co-founder of Vancouver-based Silverstring Media. "[This] blurring between real and not real... brings a ton of opportunity with it, but also huge challenges."

The movement towards combinations of story, technology and experiences has created exciting ways of inviting the audience on new kinds of narrative journeys.

Audience driving industry

Stories and creators need a public to succeed. "Ideally, you want to follow your audience to where they are, instead of asking them to come to you," said Alternate Reality Game (ARG) designer Steve Peters (who also works on escape rooms) from Los Angeles.

Following digital audiences wherever they go has led creators to interesting places with storytelling. "I'm most excited about the indie game scene, especially in the art game scene," said Lucas J.W. Johnson, co-founder of Silverstring Media.

"[They] are doing really interesting, experimental, artistic, interactive media. Really pushing the boundaries of what games can do, what interactive media can do, what media can do, period, especially focusing on really personal stories [and] a lot of queer stories."

Allowing audiences to lead, interpret and co-create like an improv performer also differentiates them. "The biggest games that inspire have all been story-driven games [that empower] me to make decisions and feel like my choices and the way that I read things matters," said Tanya Kan, founder of the Toronto video game company Vivid Foundry.

This audience-led journey also allows creators to move between the linear world of film and television into more immersive narratives, too. "In interactive," Johnson said, "you are not telling a story but [having] an *experience*."

New storytelling approaches

"The story is the thing in linear media," explained Brent Friedman, screenwriter and narrative designer for television, film, video games, virtual reality (VR) and augmented reality (AR) in Langley, Washington.

"Everything inside that story: the plot, the characters within it, is the thing. It's why you're doing it. [We want] to be told a good story.

"In a game, the experience is the thing and the story is only one part of it. The key difference is to figure out how to tell a story that enhances the experience."

One great differentiator between linear and interactive storytelling is how the user — with their own eye and worldview — is guided by the storyteller, added Cyarron.

> **"In a game, the experience is the thing and the story is only one part of it. The key difference is to figure out how to tell a story that enhances the experience."**
>
> BRENT FRIEDMAN
> Screenwriter and Narrative Designer

The player must be given a greater sense of agency in an interactive experience, so the creator must get comfortable with relinquishing some control. "As soon as [the storyteller gives] the camera to somebody else, all bets are off," she said. "You can never know what they're going to focus on."

Interactive storytelling allows a certain amount of thrill seeking for both parties. Kan feels that "everyone just really wants stories that come from different perspectives [and] fans stay for stories and characters who humanize their struggles or their emotional journeys.

"How, when and where people experience stories will keep evolving," she added, "because the more times we try something new, the more we have this appetite for the novel. Something unexpected [is] what a lot of new storytelling formats offer. The story can be traditional but how it unfolded, my role in it and who I was allowed to interact with [might] be surprising."

Adventures in ARG

Mesmer & Braid in a recent Alternate Reality Game (ARG) that exceeded all expectations during the pandemic by getting twenty times the expected response — including a total of 2.6 million views of all the content, with more than 250,000 likes across TikTok, Instagram and YouTube.

ARGs can be standalone, used to fill in gaps between TV seasons and episodes, or can lead to a film or video game launch (this is the case for *Mesmer & Braid*, which was created as a prequel to the iPhone game *HoloVista*).

"A classic ARG is a story that's broken up into little bits and scattered around on the Internet for the audience to find the pieces, to find the dots, connect them themselves and actually end up telling the story to each other," explained Peters. "They feel a sense of ownership and agency in the story; it feels very much their own... it's very collaborative, very community-building... it's a story that doesn't realize it's a story."

Art and literary video games also seek to find the balance between the tensions of play and narrative. Cyarron, for example, contributed to the anthology video game *Where the Water Tastes Like Wine*, which is a narrative adventure game about travelling, sharing stories, and surviving a Depression-era America.

"We were trying to do a lot of play with liminality," Cyarron explained, "[in order] to invite the player [to themselves become] a participant and have their personal growth and exploration be the point of the game.

"Where can you situate the responsibility for play and mediation? Can you put that on the player? And can you, as the storyteller and the game designer, focus more on creating so that you can hold that space?"

Kan and her team, meanwhile, are developing an emotional, 3D cyberpunk visual novel with multiple endings called *Solace State*. And *Glitchhikers*, from Silverstring Media, is a game that is heavily dependent upon what the player brings to the space, which has been an interesting exploration for the developers.

Finally, formats like VR and AR create their own challenges when the player themselves becomes the main character. "I've had to completely rethink [point of view]," said Friedman. "We're basically telling the player, 'You're the director, you can see and experience this in any way that you want.'

"The player could be looking at [things] from a completely different [angle] that you have no control over so, for every little detail, you have to think through the 360-degree possibilities that you're giving [them]."

Coming back to community

Stories provide a means to escape reality and boredom but, perhaps most importantly, they provide an opportunity to connect with others. It's in the shared conversations around beloved narratives, characters and creators where Kan sees creative fandom coming into its own.

"People spend so much of their personal intellect and energy creating fan art and fan content," she said. "I find it lovely [to] see such a proliferation of fan culture, even in this year when a lot of the world is struggling."

People develop conversations around content since there's less to do during the pandemic and more focus and dependence on online connectivity, said Friedman. "I don't want to talk about COVID-19 anymore. So what can I talk about? Go have a media experience [and] let's talk about that... [it can] be something that drives conversation."

Digital spaces provide shared experiences online at a time when it is much more difficult to connect in the real world, creating opportunities for savvy and innovative creators.

"This is a unique time [so] just do what you love. Take advantage, do those passion projects, create amazing stuff, tell the stories that you want to tell and experiment," said Peters.

"Don't worry about getting a huge audience; sometimes it's just great to have a little, intimate [experience and] you'll find providing an escape for people is so gratifying, so satisfying, it will feed your soul as well."

Dive deeper

READ

Storytelling in games as compared to film, an article on UX Collective

The Compelling Art of Environmental Storytelling: Story Through Play, an article on Magfest

Video games are literature's new frontier, an article on VentureBeat

Literary Video Games, an Exciting Realm for Storytelling, an article on Book Riot

Dashboards

Media consumption in Canada

Lexicon

Anglophones (EN)
Francophones (FR)
G8

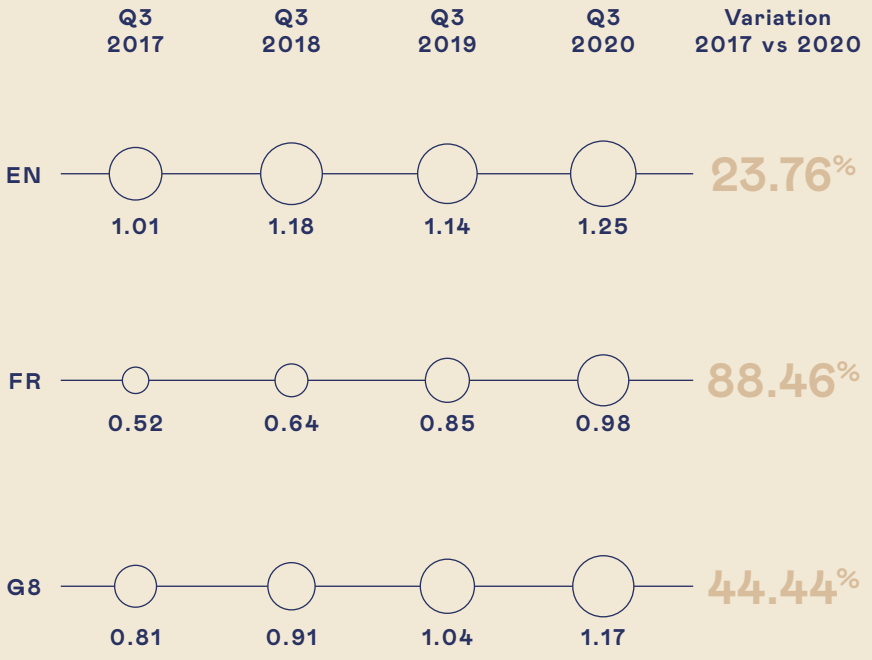
On an average day

How long do you spend watching television?

Hours per day, decimals
Canadian Internet users ages 16-64
Source: GlobalWebIndex

On an average day

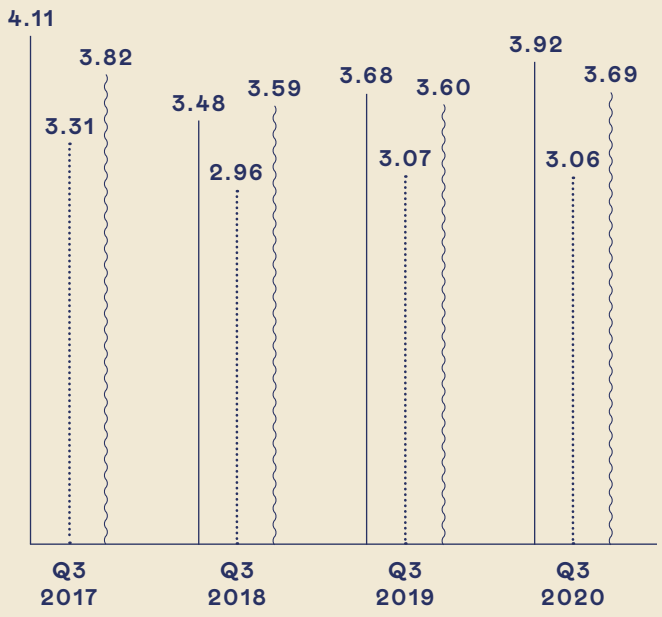
How long do you spend watching on-line television/ streaming?



Hours per day, decimals
Canadian Internet users ages 16-64
Source: GlobalWebIndex

On an average day

How long do you spend online on a PC, a laptop and/or tablet?



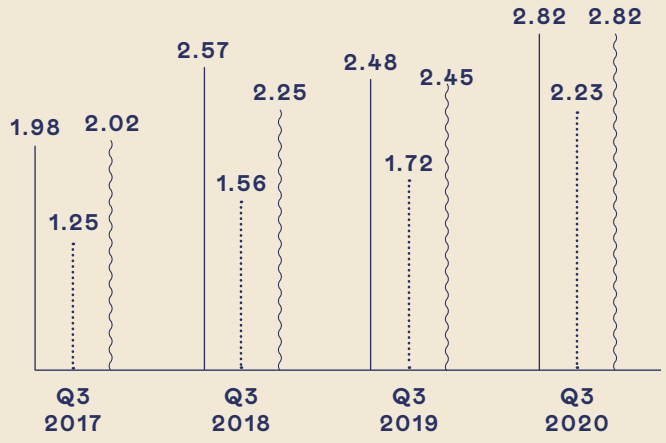
Variation 2017 vs 2020

EN	-4.62%
FR	-7.55%
G8	-3.40%

Hours per day, decimals
Canadian Internet users ages 16-64
Source: GlobalWebIndex

On an average day

How long do you spend online on a smartphone?



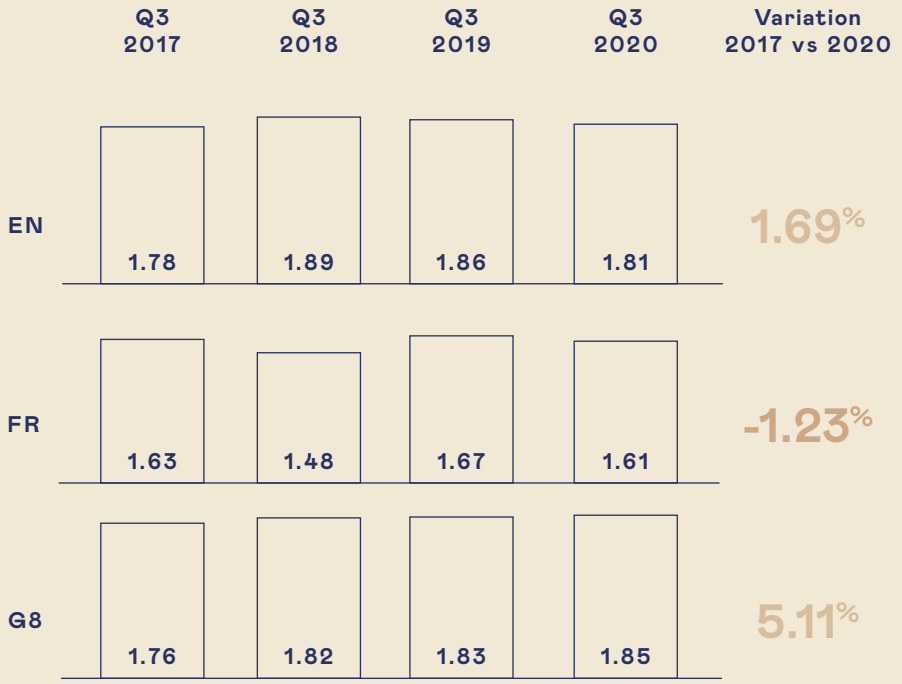
Variation 2017 vs 2020

EN	42.42%
FR	78.40%
G8	39.60%

Hours per day, decimals
Canadian Internet users ages 16-64
Source: GlobalWebIndex

On an average day

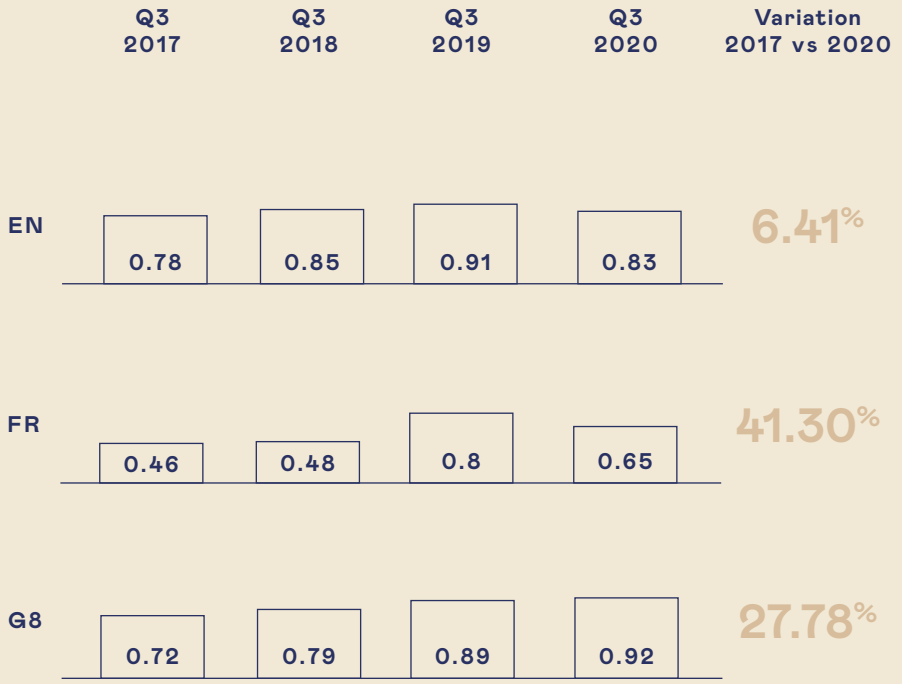
How long do you spend on social media?



Hours per day, decimals
Canadian Internet users ages 16-64
Source: GlobalWebIndex

On an average day

How long do you spend on game consoles?



Hours per day, decimals
Canadian Internet users ages 16-64
Source: GlobalWebIndex

Device penetration rate

EN | FR | G8

SMARTPHONE
94.6% | 89.2% | 95%

PC/LAPTOP
79.4% | 79.3% | 76.7%

SMART TV
46.1% | 42.4% | 40.7%

GAME CONSOLE
37.1% | 34.8% | 34%

TABLET
52.3% | 52.9% | 45.7%

VR HEADSET
4.5% | 3.3% | 3.8%

EREADER
14.9% | 10% | 13.2%

SMART SPEAKER
17.8% | 11% | 11.3%

TV STREAMING STICK/DEVICE
27.2% | 15.7% | 22.8%

Q3 2020
Canadian Internet users ages 16-64
Source: GlobalWebIndex

Online services used by Canadians

To watch or download TV shows, films or videos

EN | FR

APPLE TV+
10.3% | 6.00%

AMAZON PRIME VIDEO
34.2% | 17.9%

BRITBOX
2.1% | 0.7%

CBC GEM
8.8% | 1.7%

CLUB ILLICO
1% | 15.3%

CRACKLE
1.9% | 0.4%

CRAVE
16.8% | 7.1%

DAZN
4.5% | 2.8%

DISNEY+
23.6% | 13.4%

ITUNES
8.6% | 9.5%

NBA LEAGUE PASS
2.7% | 2.7%

NETFLIX
68.3% | 52.7%

NFL GAME PASS
1.2% | 1.1%

TOU.TV EXTRA
0.7% | 17.3%

VIMEO
4% | 3.8%

YOUTUBE KIDS
0.1% | 3.5%

YOUTUBE PREMIUM
11.8% | 13.4%

Q3 2020
Canadian Internet users ages 16-64
Source: GlobalWebIndex

The Canadian media market

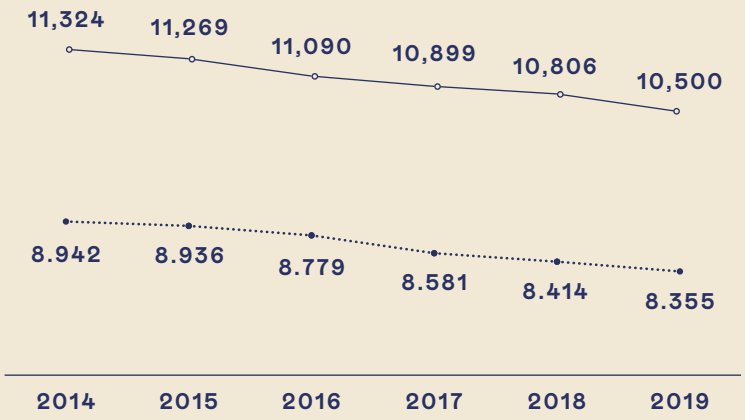
Lexicon

Anglophones (EN)
Francophones (FR)
G8

Canadian broadcasting distribution undertakings

SUBSCRIBERS
Millions

REVENUE
Billion $

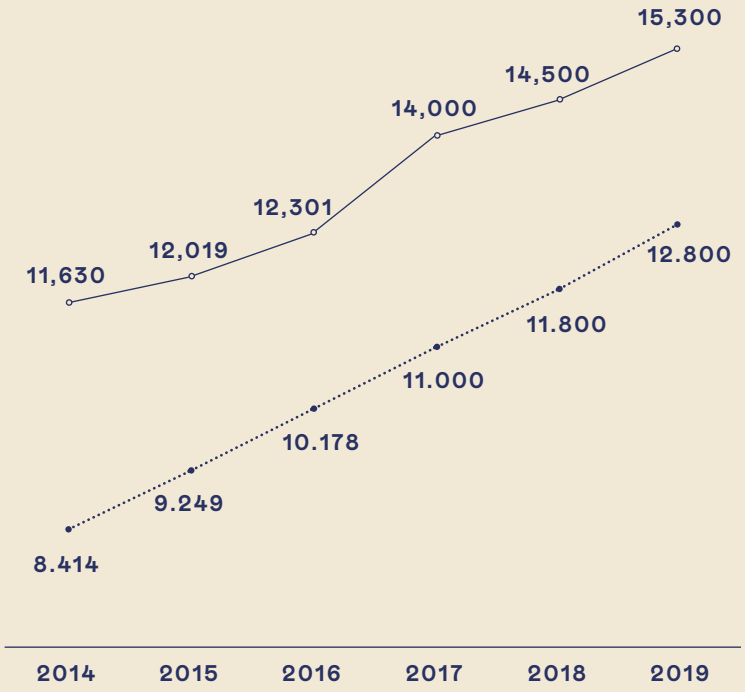


Source: CRTC, 2020 Communications Monitoring Report

Canadian Internet service providers

SUBSCRIBERS
Millions

REVENUE
Billion $



Source: CRTC, 2020 Communications Monitoring Report

Size comparison for the main screen-based economies

$9.3 BILLION

Total television and film production volume

13%
Broadcast in-house

35%
Production of Canadian content

52%
Foreign production and service

TV PRODUCTION
$2.89 billion in production volume

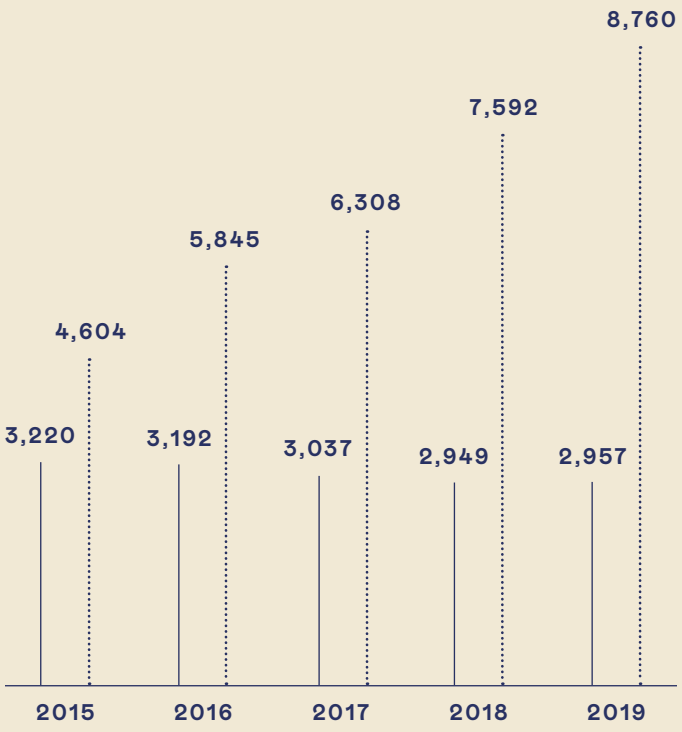
CINEMA
$337 million in production volume

VIDEO GAME
$3.18 billion in production volume

Source: CMPA, Profile 2019
ESAC, The Canadian Video Game Industry 2019

TV and digital advertising spending in Canada

Million $



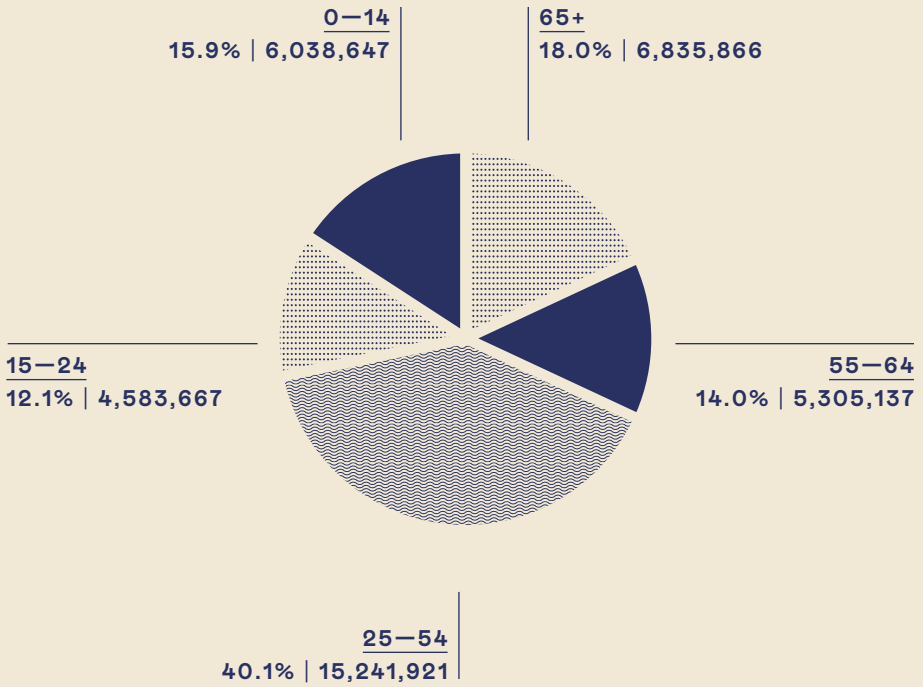
Source: IAB Canada, 2019 Actual Canadian Internet Advertising Revenue Survey

Demographics of Canada

Lexicon

Anglophones (EN)
Francophones (FR)
G8

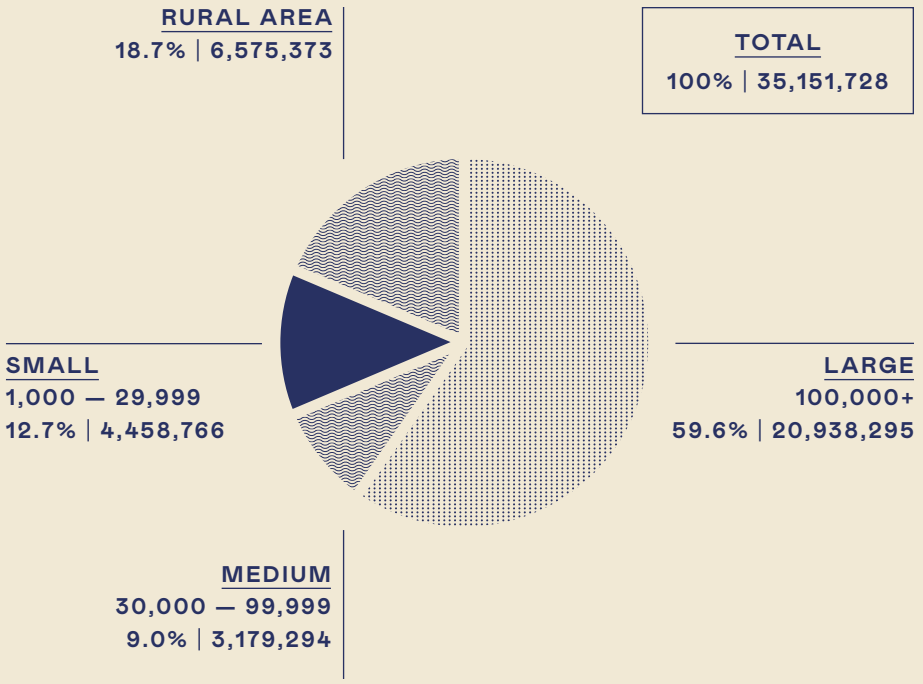
Canadian population estimates by age



AGE
Percentage of population | Count

Source:
Statistics Canada

Distribution of population by size of population centre



SIZE OF POPULATION CENTER
Percentage of population | Count

Source: Statistics Canada,
2016 Census

Visible minorities and Indigenous identity of Canadians