



Indigenous Audiovisual Sector Economic Impact Assessment

Nordicity

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1. Introduction

The Department of Canadian Heritage commissioned Nordicity to develop a baseline of the Indigenous audiovisual sector. The baseline developed in the study will help to support evidence-based policy-making including for the Indigenous Screen Office (ISO), and will also help to determine the impact of legislation including the modernization of the Broadcasting Act.

1.1 Methodology

As this study established the first pilot of an economic profile of the Indigenous audiovisual production industry, there were several challenges assembling data inputs. Standard reporting on consolidated production spending, employment and funding data for the Indigenous audiovisual industry is not readily available through the Canadian Audio-Visual Certification Office (CAVCO) and thus data had to be gathered through a broad engagement with broadcasters, funding bodies and Indigenous production companies.

The study used the ISO's definition of an Indigenous-controlled corporation- that is, a minimum 51% ownership by persons who are First Nations, Inuit, or Métis, and projects in which two of the three key members of the creative team (i.e., director, screenwriter, showrunner, producer) are Indigenous.

Data was collected directly from the following funders: the ISO, Telefilm Canada, the Canada Media Fund (CMF), the Nunavut Film Development Corporation (NFDC), the Bell Fund, and Northern Aboriginal Broadcasting (NAB). Data was also collected from the following broadcasters: Aboriginal Peoples Television Network (APTN), and Bell Media. Uvavut TV and the Canadian Broadcasting Corporation (CBC) were also contacted to participate. However, at the time of this study, they were not able to provide the data required.

Each funder was provided a detailed data sheet to fill out that requested data for the fiscal years 2019/20 to 2021/22 on:

- a breakdown of total funding provided to Indigenous production by format, genre, and region;
- total budget of productions funded and the average percentage breakdown of financing (broadcaster license fees, tax credit, Canadian distributors, funding agencies, self-financing, and other);
- hours of content and average percentage breakdown of budget (above the line, below the line (i.e., crew and extras), below the line supplies and services, post-production/visual effects).

Each broadcaster was also provided a data sheet to fill out that requested data for the same years on Indigenous television production expenditures including in-house programming, original independent production, license fees paid by the organization, other production financing, and license fees for 'off-the-shelf' content.

A survey was conducted to supplement the data provided by funders and broadcasters. Nordicity worked closely with the ISO to circulate the survey to its members. A total of 40 invitations were sent to Indigenous producers and production companies, and 22 complete responses were collected. Nordicity also conducted 11 one-on-one interviews with a sample of

Indigenous producers and production companies to gain qualitative insights into their experiences in the film and television industry.

While the analysis provided key insights into the Indigenous audiovisual sector, there were some limitations. Not all funders and broadcasters that were invited to participate in the study were able to, and those who did were unable to provide all the data requested. Data was also not collected for each individual province and territory, and so analysis was limited to five provinces and an “other” category. In addition, not all Indigenous producers participated in the survey or interviews and so the findings presented in the report are based only on the information provided by those who did.

2. Funder and Broadcaster Data: Results

The following section outlines the results of analysis conducted with data received from funders and broadcasters in Canada. Section 2.1 looks at the distribution of funding across Canada by funder, province/territory, genre, and format. Section 2.2 looks closely at production spending, and Section 2.3 outlines overall economic impact of Indigenous screen production in Canada.

2.1 Distribution of Funding

Total funding for Indigenous productions increased considerably over the three-year period from approximately \$15,922,000 in 2019/20 to approximately \$30,973,000 in 2021/22 (Table 1).¹ The ISO was the main driver of this increase, with funding jumping from under \$300,000 to over \$12.5 million. However, Telefilm and the Bell Fund also had large increases in funding allocated to Indigenous production, and the CMF remained relatively consistent over the three-year period.

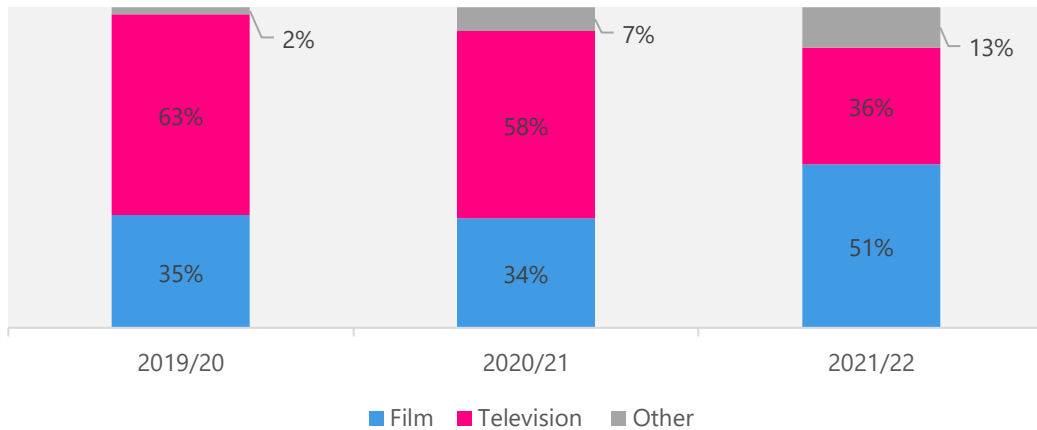
Table 1: Total Funding for Indigenous Productions (\$)

	2019/20	2020/21	2021/22
Total funding for Indigenous productions (\$)	15,922,000	22,191,000	30,973,000

Another major change across the industry is the proportion of funding going towards different formats of Indigenous production. In 2019/20, most of the funding (63%) went to television production, 35% went to film production, and only 2% went to other types of production (Chart 1). In 2021/22, the majority (approximately 51%) of funding was allocated to film production and an additional 13% allocated to "Other." This category included web series, short-form digital series, and VR/XR.

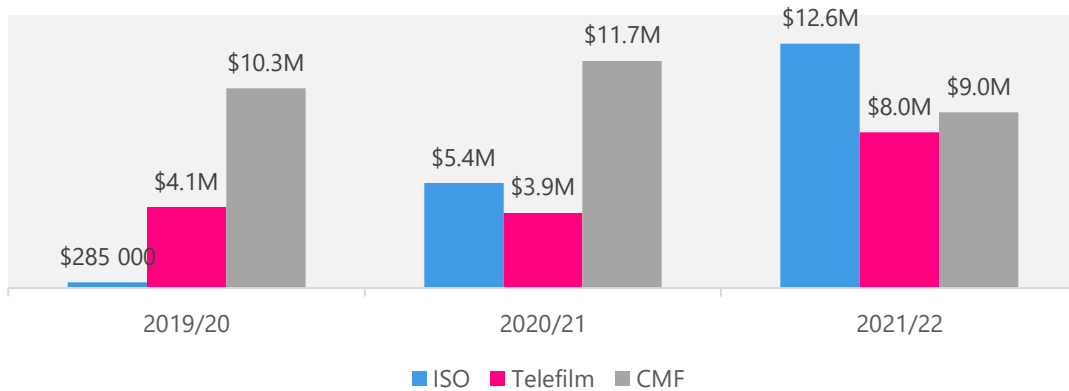
¹ National Aboriginal Broadcasting (NAB) is the only Indigenous broadcasting fund in Canada. NAB provides support for both radio and television, as well as operational support. Based on budgets and agreements, it is not possible to obtain numbers for television production. Therefore, NAB data was not included in the analysis.

Chart 1: Total Funding for Indigenous Productions by Format²



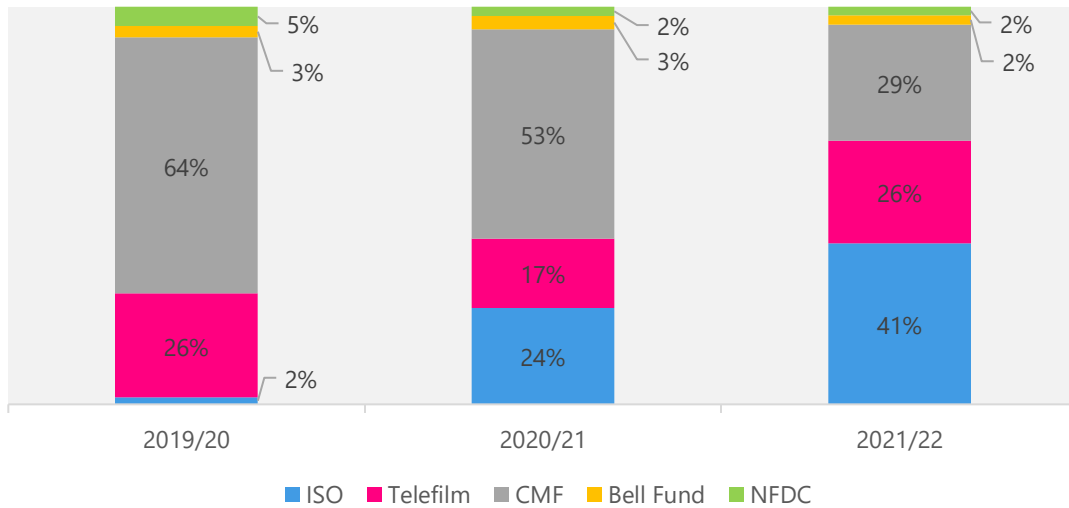
The proportion of funding allocated by different funders for Indigenous production has also changed over the last three years. The ISO went from funding just about 2% (approximately \$285,000) of Indigenous production in Canada in 2019/20 to about 41% (approximately \$12.6 million) in 2021/22 (Charts 2 and 3). Telefilm continues to be a significant funder of Indigenous production, increasing funding for Indigenous production considerably over the three-year period and making up an estimated 26% (\$8 million) of total funding in 2021/22. The proportion of funding provided by the CMF to the overall Indigenous production ecosystem has decreased over the three-year period. However, their funding levels have remained relatively consistent (between \$9 million and \$12 million). The NFDC and the Bell Fund also continue to play small, but important roles in the industry – NFDC in providing funding to an emerging screen community in Nunavut, and the Bell Fund through slate development funding and support for short-form digital series.

Chart 2: Total funding for Indigenous Productions (ISO, Telefilm, CMF)



² Funding data broken down by format was unavailable for the NFDC across all three years, and for the ISO for 2019/20.

Chart 3: Proportion of Total Funding for Indigenous Productions by Funder



The data suggests that total funding for Indigenous film and television increased across Ontario, British Columbia, Quebec, and Alberta. Between 2019/20 and 2021/22, British Columbia saw the largest increase in funding of approximately 422% and made up approximately 30% of total funding for Indigenous production in 2021/22 (Charts 4 and 5). Alberta also saw a significant increase, almost doubling funding for Indigenous production over the three-year period. Considerably more money is being provided to “other” provinces and territories for Indigenous production, including Manitoba, New Brunswick, Nova Scotia, Northwest Territories, Newfoundland and Labrador, Saskatchewan, and the Yukon. Based on the data provided, Prince Edward Island did not receive any funding over the three-year period from these funders.

Chart 4: Total Funding for Indigenous Productions by Province/Territory

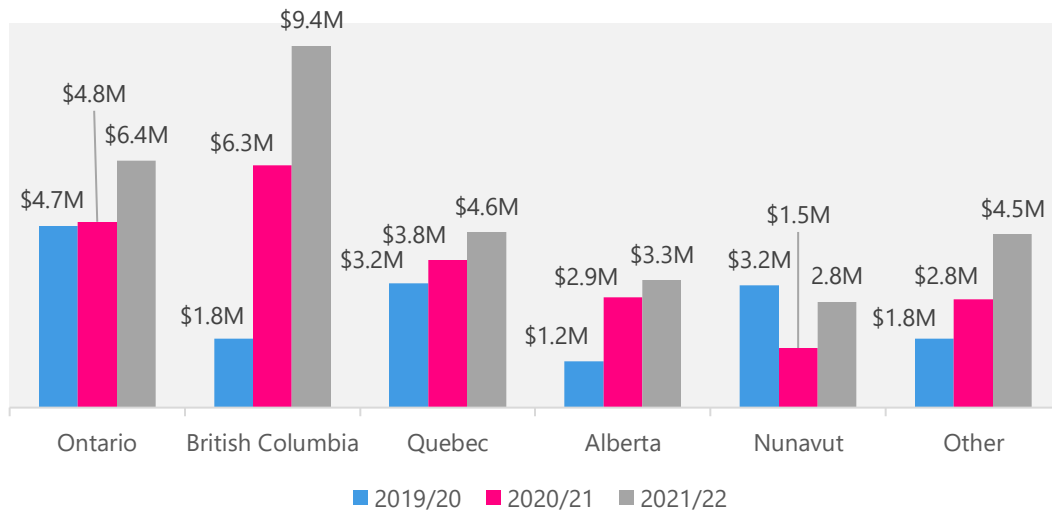
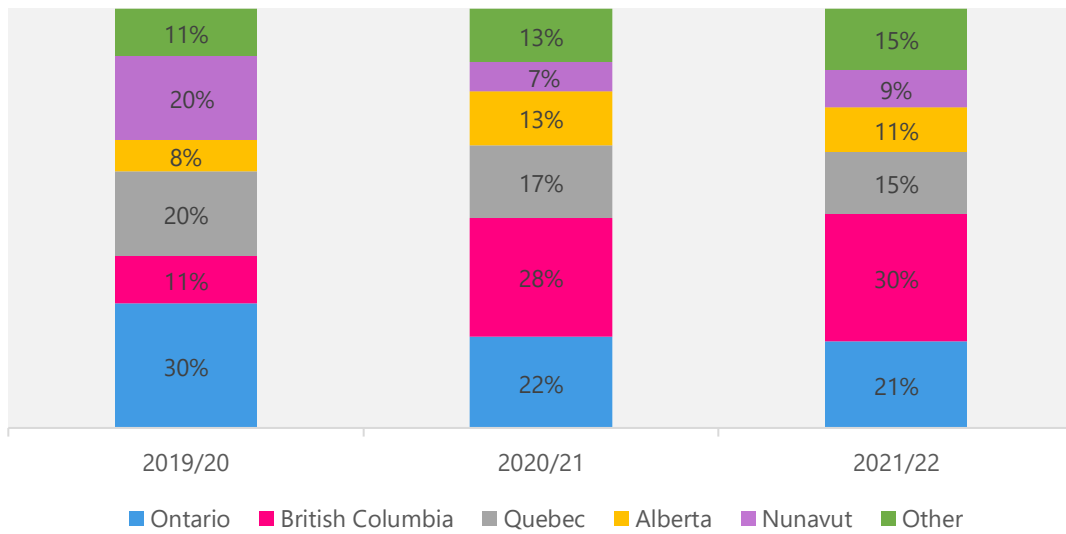
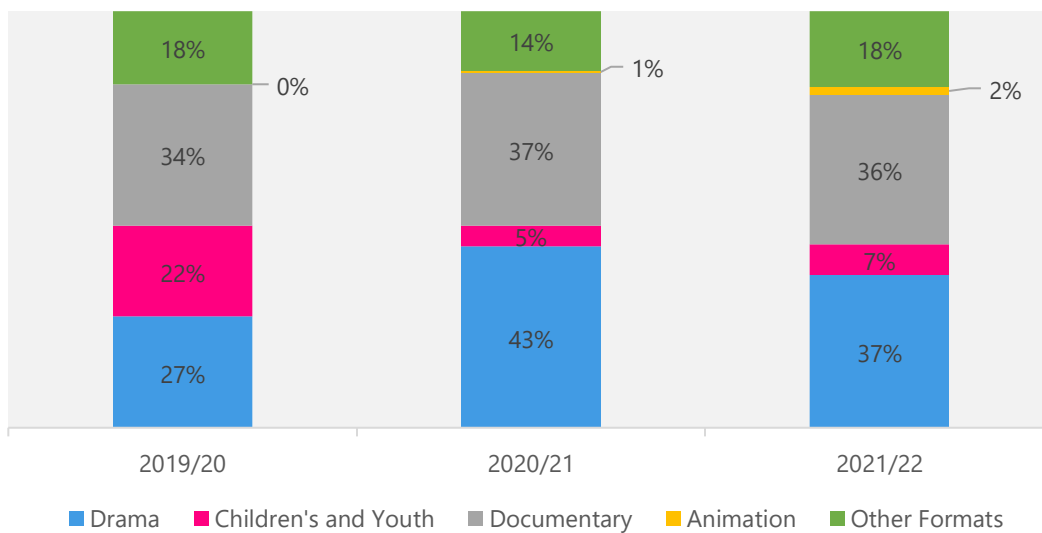


Chart 5: Proportion of Funding for Indigenous Production by Province/Territory



Between 2019/20 and 2021/22, the proportion of funding allocated to Indigenous documentary production remained relatively consistent. Children’s and youth fell considerably from 22% to 7%, whilst drama grew from 27% to 37% (Chart 6). “Other Formats” made up between 15% and 20% of funding provided to the industry, and included comedy, variety and performing arts, lifestyle, thriller, sci-fi, romance, fantasy, education, and experimental.

Chart 6: Total Funding for Indigenous Productions by Genre³



2.2 Production Spending

³ Funding data broken down by genre was not available for NFDC.

Based on the data collected from APTN, ISO, CMF, Telefilm Canada, and the Bell Fund, estimates were made of the annual volume of Indigenous audiovisual production. Some of these organizations will fund the same television or film project, which presents a risk of double-counting. To address this double-counting risk, Nordicity collected additional information from CMF and Telefilm Canada. This information was used to make further adjustments to the gross amounts of audiovisual production budgets reported by each organization.

After making adjustments to reduce the risk of double-counting, Nordicity estimates that Indigenous audiovisual production volume totalled \$136.5 million in 2019/20, \$213.6 million in 2020/21, and \$290.6 million in 2021/22.

The majority of Indigenous audiovisual production was in the television format. Between 2019/20 and 2021/22, it accounted for between 66% and 88% of total Indigenous audiovisual production. In 2021/22, Indigenous television production totalled \$198.2 million, or 68% of the total volume.

Indigenous feature film production fluctuated relatively widely between 2019/20 and 2021/22. It jumped from \$14.5 million in 2019/20 to just under \$56 million in 2020/21, before further increasing to \$70.2 million in 2021/22. A wide fluctuation such as this is common within Canada's feature film production sector, where one or two large-budget films can have a significant effect on overall sector totals.

Other audiovisual productions include web series, short films, mobile applications, and video games supported by ISO, Telefilm and Bell Fund. The total volume of other audiovisual productions jumped from \$0.7 million in 2019/20 to \$17.5 million in 2020/21, before increasing again to \$22.2 million in 2021/22.

Table 2: Estimated total volume of Indigenous audiovisual production

	2019/20	2020/21	2021/22
Volume of production (\$M)			
Television	121.3	140.1	198.2
Feature film	14.5	56.0	70.2
Other*	0.7	17.5	22.2
Total	136.5	213.6	290.6
Share of total volume			
Television	89%	66%	68%
Feature film	11%	26%	24%
Other*	1%	8%	8%
Total	100%	100%	100%

Source: Nordicity estimates based on data from APTN, ISO, CMF, Telefilm Canada and Bell Fund

* Includes web series, short films, mobile apps, and video games

Indigenous television production accounted for between 4.2% and 5.6% of annual total volume of Canadian television production, between 2019/20 and 2021/22 (Table 3). Looking across the

three-year period, from 2019/20 to 2021/22, Indigenous television production accounted for 5.2% of all Canadian television production.⁴

Within the Canadian theatrical feature film sub-sector, Indigenous production was worth as much as 20.8% of the total volume of Canadian theatrical feature film production in 2020/21. Indigenous production's share was lower in 2019/20 (4.5%) and 2021/22 (18.1%). Over the three-year period, Indigenous production accounted for 14.4% of total Canadian theatrical feature film production.

On a combined basis, Indigenous film and television production accounted for an estimated 6.1% of total Canadian film and television production between 2019/20 and 2021/22.

Table 3: Indigenous audiovisual production as a share of total Canadian audiovisual production

Volume of production (\$M)	2019/20	2020/21	2021/22	3-year total
Television				
Indigenous	121	140	198	460
All Canadian content	2,873	2,530	3,514	8,917
Indigenous share	4.2%	5.5%	5.6%	5.2%
Feature film				
Indigenous	15	56	70	141
All Canadian content	321	269	387	977
Indigenous share	4.5%	20.8%	18.1%	14.4%
Television + feature film				
Indigenous	136	196	268	600
All Canadian content	3,195	2,799	3,901	9,895
Indigenous share	4.3%	7.0%	6.9%	6.1%

Source: Nordicity estimates based on data from APTN, ISO, CMF, Telefilm Canada, Bell Fund and CMPA *Profile 2022*

* Includes web series, short films, mobile applications, and video games

2.3 Economic Impact Assessment

⁴ Because of differences in production accounting practices between the Canadian Audio-Visual Certification Office (CAVCO) and the organizations that directly fund Indigenous audio-visual production, the three-year total share may be more indicative of Indigenous production's actual share of Canadian content production in recent years.

The following sub-section presents estimates⁵ of the overall economic impact of Indigenous screen production in Canada in 2021/22, in terms of full-time equivalent (FTE) employment, compensation of employment (COE) and gross domestic product (GDP). See Box 1 below for definitions.

These estimates of economic impact are based on the economic ratios found in *Profile 2022*, published by the Canadian Media Producers Association (CMPA). For that reason, the estimates are broken out into direct and spin-off impacts, where spin-off impacts refer to the sum of indirect (i.e., supply chain) and induced (i.e., impacts across the wider economy due to re-spending) impacts.

In 2021/22, there was a total volume of \$198.2 million in Indigenous television production (Table 4). This television production volume generated 2,840 FTEs of employment, \$190.3 million in COE and \$232.2 million in GDP. Out of this total impact, 1,470 FTEs of employment (i.e., cast and crew employment) were generated directly within the television production industry, along with \$113 million in COE and \$117 million in GDP.

Table 4: Economic impact of Indigenous television production in Canada, 2021/22

	Direct	Spin-off ¹	Total
Total volume (\$M)	198.2	--	--
Employment (FTEs)	1,470	1,370	2,840
COE (\$M)	113.0	77.3	190.3
GDP (\$M)	117.0	115.2	232.2

Source: Nordicity estimates based on data from APTN, ISO, CMF, Telefilm Canada, Bell Fund and CMPA *Profile 2022*

1. Equal to the combined value of indirect and induced impacts.

Box 1: Economic impact analysis - Definitions

Employment (full-time equivalents (FTEs)) measures the level of employment generated within an industry in terms of the equivalent number of full-time workers rather than total headcount. FTEs is a more suitable measure of employment within the audiovisual production industry where a large portion of workers are employed on a casual or temporary basis for a period of months, weeks or days on a single production project.

Compensation of employment (COE) refers to the value of wages, salaries and employee benefits paid by business and organizations to secure the labour of workers.

Gross domestic product (GDP) is equal to the sum of COE, operating surplus, mixed income, and taxes on production less subsidies. Since GDP already includes COE, the two metrics should not be summed together.

⁵ For these estimates, the volume of Indigenous film production supported by Telefilm Canada is assumed to approximate the lower boundary of the total volume indigenous film production in 2021/22. Similarly, the volume of Indigenous television production supported by the CMF is assumed to approximate the lower boundary of the total volume indigenous television production in 2021/22.

Direct economic impacts refer the employment, COE and GDP impacts experienced directly within the audiovisual production industry.

Spin-off economic impacts refer to the combined value of (i) indirect impacts that occur when the audiovisual industry companies purchase supplies and services from other industries and (ii) induced economic impacts, which materialize when workers employed on account of direct and indirect impact re-spend their income across the wider economy.

In 2021/22, the total volume of Indigenous film production was an estimated \$70.2 million (Table 5). This film production volume generated 1,020 FTEs of employment, \$67.7 million in COE and \$82.6 million in GDP. Out of this total impact, 530 FTEs of employment (i.e., cast and crew employment) were generated directly within the film production industry, along with \$40 million in COE and \$41.4 million in GDP.

Table 5: Economic impact of Indigenous film production in Canada, 2021/22

	Direct	Spin-off ¹	Total
Total volume (\$M)	70.2	--	--
Employment (FTEs)	530	490	1,020
COE (\$M)	40.0	27.6	67.7
GDP (\$M)	41.4	41.2	82.6

Source: Nordicity estimates based on data from APTN, ISO, CMF, Telefilm Canada, and CMPA *Profile 2022*

Notes:

1. Equal to the combined value of indirect and induced impacts.

In 2021/22, the volume of other Indigenous audiovisual production (e.g. web series) totalled an estimated \$22.2 million (Table 6). This audiovisual production volume generated 260 FTEs of employment, \$20.6 million in COE and \$25 million in GDP. Out of this total impact, 200 FTEs of employment were generated directly within the audiovisual production industry, along with \$16.9 million in COE and \$17.9 million in GDP.

Table 6: Economic impact of 'other' Indigenous audiovisual production in Canada, 2021/22

	Direct	Spin-off ¹	Total
Total volume (\$M)	22.2	--	--
Employment (FTEs)	200	60	260
COE (\$M)	16.9	3.7	20.6
GDP (\$M)	17.9	7.0	25.0

Source: Nordicity estimates based on data from ISO, CMF, Bell Fund and Telefilm Canada

Notes:

1. Equal to the combined value of indirect and induced impacts.

On a combined basis, the total volume of Indigenous audiovisual production (i.e., television, film and other audiovisual production) was an estimated \$290.6 million in 2021/22 (Table 7). This audiovisual production volume generated a total of 4,120 FTEs of employment, \$278.6 million in COE and \$339.8 million in GDP. Out of the total economic impact generated by

Indigenous audiovisual production, 2,200 FTEs of employment were generated directly within the audiovisual production industry, along with \$169.9 million in COE and \$176.3 million in GDP.

With respect to the total economic impact (i.e., inclusive of direct and spin-off impacts), every \$1 million invested in the production of audiovisual content generated 14.2 FTEs of employment and \$1,169,000 in GDP.

Table 7: Economic impact of Indigenous audiovisual production in Canada, 2021/22

	Direct	Spin-off ¹	Total
Total volume (\$M)	290.6	--	--
Employment (FTEs)	2,200	1,920	4,120
COE (\$M)	169.9	108.9	278.6
GDP (\$M)	176.3	163.4	339.8

Source: Nordicity estimates based on data from APTN, ISO, CMF, Telefilm Canada, Bell Fund and CMPA *Profile 2022*

1. Equal to the combined value of indirect and induced impacts.

Box 2: Economic impact of the Indigenous Screen Office, 2021/22

In 2021/22, the ISO provided \$8.9 million in funding to audiovisual production through the Production Funding and Enhancements Funding streams of its Story Fund.⁶ According to the ISO, its production-funding programmes supported \$102.9 million in audiovisual production

⁶ ISO (2022) [Annual Report 2021-22](#). P. 11.

(i.e., total audiovisual production budget). This included the production of television, film and other audiovisual content (e.g., web series).

ISO-supported audiovisual productions achieved this rate of financing leverage by also attracting financing from Canadian broadcasters, distributors, the CMF, and Telefilm Canada, and other private or public production financiers, while also obtaining federal and provincial film or video tax credits.

The total volume of audiovisual production supported by the ISO (\$102.9 million) generated an estimated 1,440 FTEs of employment, \$98.2 million in COE and \$119.8 million in GDP. This included 800 FTEs, \$62.4 million in COE and \$65.1 million in GDP directly within the audiovisual production industry.

With respect to the total economic impact, every \$1 million of audiovisual production funded by the ISO generated 14.0 FTEs of employment and \$1,164,000 in GDP was generated.

Economic impact of audiovisual production funded by the Indigenous Screen Office, 2021/22

	Direct	Spin-off ¹	Total
Total volume of audiovisual production supported by ISO (\$M) ²	102.9	--	--
Employment (FTEs)	800	640	1,440
COE (\$M)	62.4	35.8	98.2
GDP (\$M)	65.1	54.7	119.8

Source: Nordicity estimates based on data from ISO, CMPA *Profile 2022* and CMF

1. Equal to the combined value of indirect and induced impacts.

2. The ISO provided \$8.9 million in production funding to audiovisual projects with combined total budgets of \$102.9 million. These budgets were also funded with financing from other public and private organisations, and federal and provincial governments.

3. Challenges and Opportunities

In addition to the economic impact of Indigenous production over the past three years, it is important to understand the context in which that production occurs. To that end, this section presents the unique challenges experienced by Indigenous producers, and the emerging opportunities they hope to leverage in the future. These findings provide key insight into how best the industry can support Indigenous creators and the Indigenous screen sector more broadly.

Anonymized quotes are used through this section to further highlight each of the key points.

3.1 Challenges for Indigenous Producers

A key challenge for the industry is systemic racism. Despite attempts to make the Canadian film and television industry more diverse and inclusive, Indigenous producers continue to feel the ongoing impacts of a history of discrimination and exploitation. This fundamental reality continues to create additional challenges and barriers for the Indigenous screen sector that are listed below.

"[The Indigenous film community hasn't] evolved with the rest of the film community in Canada because of neglect and no opportunities to tell our own stories."

"Institutional racism is still pretty bad in most of the major institutions."

"Everyone says they are trying and changing things but as with any culture change, it takes a very long time for any meaningful change to happen."

A lack of Indigenous creators

Interviewees noted a dearth of qualified, Indigenous talent. While interviewees pointed to an enormous number of directors with superior talent, they described a need for more Indigenous producers, below the line workers, and on-screen talent. This need is even greater for individuals who are Indigenous and female. One of the causes of this that was raised is a continued reluctance to enter the film and television industry, given historic systemic racism and lack of opportunity.

"There is a small handful of really established Indigenous producers."

"There is only one junior assistant editor in training in Canada and one senior editor."

"We were offering a 60k salary but couldn't get an actor to come in to audition."

This places an additional burden on Indigenous creators to either hire non-Indigenous talent, or invest significant time, money, and effort into scoping, training, mentoring, and rehearsing with upcoming Indigenous talent.

"I always try to hire people from Indigenous and diverse communities... which takes extra efforts. Whereas non-Indigenous companies are getting incentives to hire Indigenous or diverse."

Working with non-Indigenous producers

Interviewees mentioned that Indigenous content continues to be produced and created by non-Indigenous people. They maintain ownership and narrative control despite a lack of understanding or care for the Indigenous communities they are telling stories about.

One of the causes of this challenge that was noted is the emphasis placed on “having a track record” in the industry by funders. This requirement has forced Indigenous creators into agreements with their non-Indigenous counterparts who are more likely to have this track record.

Multiple interviewees discussed the negative experiences they had working with non-Indigenous producers on non-Indigenous production sets. Typical hierarchical and colonial structures created dangerous environments for Indigenous peoples to work in, including racism and toxicity.

Interviewees highlighted a need for Indigenous peoples to own productions about their communities, and to have the control to decolonize their sets. Having Indigenous creators in those roles will also lead to the hiring of Indigenous creators at lower levels as well.

“Right now, it’s still majority non-Indigenous owned production companies that are benefiting from Indigenous projects.”

“The creator’s name and reputation are attached to the work, and it feels wrong for them to have any ownership over those stories.”

“[They] had to bring non-Indigenous people and it was dangerous in how they treated people.”

Working with funders and broadcasters

Indigenous producers face several challenges working with funders and broadcasters within the Canadian film and television industry. Interviewees indicated that dedicated Indigenous funding programs are often perceived as “incubator” programs. These programs are reported to offer less funding both per project, and in total, than the general streams. This dynamic forces Indigenous producers to either reduce the budget of their films and consequently the quality of their work to be eligible for these programs. Alternatively, they are forced to compete with or work alongside non-Indigenous creators who typically have had better access to funding in the past and therefore a more established record, as well as greater administrative capacity.

“Our white counterparts get way more money in the general stream. But our projects costs just as much as theirs.”

“Our projects are evaluated as if we need less money.”

Interviewees also detailed other ways in which Indigenous producers are at a disadvantage. They described having to work with and be judged by non-Indigenous decision-makers at funders and broadcasters who decide what stories get told. The rubric that they are assessed by is also different. For example, Indigenous producers are expected to develop uniquely-themed stories and to prove “authenticity” – something non-Indigenous or non-minority producers are not made to do. This increases the administrative burden on Indigenous producers who are already under-funded and lack capacity.

“Broadcasters will say that they’ve already got an environmental Indigenous film so they can’t take another one... thematically, it’s the same thing. Not a rubric they would use for any other non-Indigenous or non-minority project.”

“The application has gotten twice as big. No one else has to do that. Spending more time on these applications and not necessarily getting more money.”

In addition, Canadian film and television funding is not meeting the unique needs of Indigenous producers and production companies. Creating strong Indigenous content requires undertaking extensive protocols and community engagement. Unfortunately, most funding programs do not have the flexibility for applicants to use funds for things like building a relationship with the community or having elders on set. Development and slate funding sources that help to build capacity are also limited and are often inaccessible to newer and smaller Indigenous companies that need it most.

Working with tax credits

Several interviewees claimed that Indigenous producers are unable to benefit fully from Canada's tax credit system. First, Indigenous producers often lose access to critical tax credits because they are unable to find sufficient talent within their own province or on reserve and are forced to hire from other locations. These limitations on tax credit eligibility are challenging for an emerging film community that is spread out sparsely across Canada. Additionally, as with most funding programs – Indigenous producers do not have the flexibility to use their tax credits towards things they need most – such as growing their company. A need to adapt tax credit systems – or at least make exceptions for Indigenous and other equity-deserving producers- was identified.

"We are pushed into working with people from within our own province."

"The industry was set up in the past where you didn't have to put 90% of your tax credits into the budget. So, we could help the company grow. Now we have to put everything into the budget."

Wearing multiple hats

Indigenous producers are forced to wear multiple hats. To earn a living, they often write and direct as well, shifting focus away from what they want to be doing. They must also manage business affairs themselves – as they are not in a position to hire support. This leaves Indigenous producers without the infrastructure and focus required for long-term sustainability and success.

"The majority of my earnings from productions come from writing and directing."

"We have to do it all ourselves. For sustainability, you need that kind of infrastructure that allows you to not be worried about the administration [of your business]."

3.2 Supports and Opportunities for Indigenous Producers

Several solutions to the above challenges were revealed through the stakeholder interviews. In general, interviewees noted a growing demand for more diverse stories to be told. Audiences are responding positively to authentic Indigenous stories, creating excitement and motivation for Indigenous creators, and more opportunities for them in the sector.

The Indigenous Screen Office (ISO)

The ISO was referred to repeatedly as a gamechanger for the industry with immense potential for continued growth. Almost every interviewee had received some form of funding from the organization, and several admitted that they would not be doing what they are without the ISO's support. Interviewees praised the organization's streamlined and intuitive application

process and its success in making its funding accessible to Indigenous producers. They also highlighted the ways the ISO's funding allows them to incorporate Indigenous values into their productions. Examples include allowing ceremonial tobacco as a line item, and the ISO Finishing and Impact Fund that allows filmmakers to bring their film to the communities that the story is about.

"The ISO is the biggest opportunity and the best thing that's happened to Indigenous filmmaking in Canada."

"If we didn't have the ISO, I wouldn't be doing any of this stuff."

"The ISO's grants and production has been an absolute gamechanger."

Indigenous ownership and control

Interviewees acknowledged a growing recognition in the Canadian film and television industry that Indigenous projects need to be Indigenous-led. This shift has placed pressure on the producing community to ensure collaboration is authentic and that Indigenous creators retain ownership and narrative control. This has had a powerful impact on the Indigenous screen sector, as well as within the communities in which they are filming where meaningful jobs and mentorships are being provided.

Several interviewees went a step further to suggest that organizations should only fund 100% Indigenous projects.

"The producers' landscape is changing."

"We need to control our IP completely and have the kind of initiatives that industry has had for years applied to us in innovative ways."

International Indigenous co-productions and co-ventures

International Indigenous co-productions, as well as co-ventures, were identified as a huge opportunity for Indigenous producers in Canada. They have been a great way to build credits and proof of deliverability and credibility. They have also been a useful avenue to securing more funding for a film. Given existing and long-term relationships across the border to the U.S. in particular, interviewees felt there is a strong argument to continue leveraging those relationships for ongoing collaboration and growth. Interviewees further alluded to using agents in other countries – particularly in Los Angeles – as another valuable opportunity for a career boost.

"[There is] lots of potential with regard to international Indigenous co-productions."

"Night Raiders is a cool example."

Protecting Indigenous languages

Interviewees pointed to a need and opportunity to protect Indigenous language in Canada through film and television. They hope that funders, broadcasters, and streamers will work together to help Indigenous communities tell their stories in their own languages, and provide them with an effective platform/network to showcase these languages and their work.

A close-knit community

Interviewees highlighted the close-knit community that Indigenous creators in the film and television industry have created. They see this as one of their biggest strengths. This year, the ISO brought a delegation of Indigenous producers to Primetime- an important Canadian media industry conference. Attendees who were interviewed called the experience “amazing” and said they appreciated the opportunity to come together and share experiences and knowledge, and have questions answered by experienced producers. Interviewees also mentioned imagineNATIVE as a valuable event for Indigenous creators to connect and pointed to a possible future opportunity at the Cannes Film Festival. Overall though, interviewees hope to have more opportunities to connect with one another and even share resources - and are looking to the ISO and other leaders in the industry to facilitate that.

“There is so much collaboration. Everyone knows each other and connects people.”

A growing Indigenous screen community

With the formation of the ISO and growing support for Indigenous production and storytelling through other major funders, broadcasters, unions and guilds, the Indigenous screen community in Canada is growing. Interviewees mentioned that the Directors’ Guild of Canada (DGC) and ISO’s training programs have been key in helping people enter the industry and making it easier for producers to find and hire Indigenous talent. The DGC was also recognized for allowing non-union Indigenous talent and creators to be permitted in to work on projects in remote locations.

“[The training programs] make the process of hiring easier.... to not have to go out and find people who are interested in learning about film, training them and then putting them on set.”

“The DGC has been amazing!”

4. Summary of Key Findings

A set of key findings emerged from the research and analysis.

- **The funding landscape for Indigenous production is changing drastically.** Over the last three years, there has been a huge increase in funding for Indigenous production with almost \$31 million allocated in 2021/22, almost double that which was allocated in 2019/20. The increase in funding for Indigenous production has largely been driven by the creation of the Indigenous Screen Office (ISO), that distributed approximately \$12.5 million in 2021/22. Other funders – including Telefilm and the CMF – continue to be stable partners for Indigenous production. This data, along with anecdotal evidence from interviews with Indigenous producers, suggests critical growth for the Indigenous audiovisual sector in Canada.
- **Indigenous production is also changing rapidly and experiencing rapid growth** – increasing from \$136.5 million in 2019/20 to \$213.6 million in 2021/22 and \$290.6 million in 2021/22. The majority of Indigenous audiovisual production has consistently been in the television format, but other formats such as web series and short films are becoming increasingly popular as more support is provided through the ISO, Telefilm and the Bell Fund. Indigenous film and television production are also having a growing impact on the broader sector - accounting for 6.9% of total Canadian film and television production in 2021/22.
- **Indigenous audiovisual production (estimated at \$290.6 million in 2021/22) generated 4,120 FTEs of employment, \$278.6 million in COE and \$339.8 million in GDP.** Out of this total impact, 2,200 FTEs of employment (i.e., cast and crew employment) were generated directly within the audiovisual production industry, along with \$169.9 million in COE and \$176.3 million in GDP. Television production was the primary contributor to the total economic impact – generating 2,840 FTEs of employment, \$190.3 million in COE and \$232.2 million in GDP.
- Interviews confirmed that Indigenous creators continue to experience several barriers and challenges in the Canadian film and television industry- many, driven by ongoing systemic racism. One of these core challenges is a lack of Indigenous creators, particularly Indigenous producers, below the line workers, and on-screen talent. This is changing slowly. The Indigenous screen community in Canada is growing thanks to opportunities provided by organizations like the ISO, DGC, and imagineNATIVE, as well as the support and guidance of more established Indigenous creators. However, **there is still a clear need to develop and support a strong talent pipeline – from training to employment to retention- specifically catered for Indigenous creators.**
- Working within the traditional Canadian funding ecosystem poses another major challenge for Indigenous producers. Funding programs for Indigenous creators often offer less funding both per project, and in total, than the general streams, and typically don't allow the use of funds for protocols and community engagement that is critical to Indigenous content creation. The emphasis on "having a track record" disadvantages Indigenous producers who have historically been excluded from the industry. The result is that Indigenous producers are often forced to work with non-Indigenous creators, often under colonial structures and unsafe conditions. It also often leads to Indigenous producers losing ownership and narrative control of their projects. **The industry needs**

to stop seeing Indigenous funding streams as “incubators” and ensure they provide equivalent levels of funding as the general streams. Funding programs also need to provide flexibility for small and emerging screen communities to use funds on what they identify as priorities- something the ISO has already implemented successfully. In addition, it is critical that Indigenous intellectual property and narrative sovereignty continues to be protected. **A higher standard of what is considered an Indigenous production (100% Indigenous-led and owned) is one way to do this, but this strategy cannot work in isolation. It must be complemented with a talent pipeline and other supports for the community.**

- Similarly, Indigenous producers have not been able to take advantage of tax credits available to them. **There is a need to adapt tax credit systems – or at least make exceptions for Indigenous and other equity-deserving groups –** so that they can hire Indigenous creators from across Canada as needed.
- The ISO is universally celebrated as a gamechanger for Indigenous production in Canada. It has helped Indigenous creators enter the industry and access a variety of supports for their creative work. **The ISO will need ongoing and increased support to help Indigenous creators continue to thrive in the industry.**

The economic profile developed through this study provides valuable insights into the Indigenous audiovisual sector in Canada. To track the growth and evolution of the sector, this profile should be updated regularly. For future editions, a more systematic methodology for avoiding double counting should be undertaken, starting with the core funders of Indigenous production and layering on from there. In addition, upfront agreements from funders to publish supported production volumes would aid in the data gathering process. It should also be noted that as the number of Indigenous projects supported increases, funders will be able to share production volume broken down on a more granular level by genre and region, providing even deeper insight into the industry.