

# Executive Summary

The Documentary Organization of Canada (DOC) - with support from the Bell Fund, Telefilm Canada, the CMPA, AQPM, and Ontario Creates- commissioned Nordicity to develop the seventh edition of “Getting Real”. In this twentieth anniversary edition of these cornerstone industry reports, “Getting Real 7” looks at the economic impact of documentary production from 2016-2017 to 2020-2021, as well as trends in production, budgets and financing, and audiences. In addition to the economic profile of the industry, the report considers the experiences of documentary filmmakers, and the challenges the industry and community face.

The study was developed using a mixed-methods approach including a literature review, analysis of industry data, a survey, and stakeholder interviews. Industry data was first acquired from the Canadian Audio-Visual Certification Office (CAVCO) to form the foundation of the statistical and financial analysis of the documentary sector, and where possible (and applicable), drew on data from funding bodies such as Telefilm Canada (Telefilm), the Canada Media Fund (CMF), and the National Film Board (NFB).



# Economic Impact of Documentary Production

The Canadian independent documentary production sector is a strong contributor to the Canadian economy, with almost \$1.3 billion in production volume in the five years between the 2016/17 fiscal year and the 2020/21 fiscal year. Despite an overall industry decline in production volume in 2020/21 because of the COVID-19 pandemic, the documentary genre grew and continued to do so in 2021/22 with an increase of 53.2%, the largest increase on a percentage basis across all genres.

The independent documentary production sector in Canada contributed \$421 million to the Gross Domestic Product in 2020/21 based on \$335 million in direct production spending and through approximately 5,600 direct and spin-off jobs.

Overall documentary production grew approximately 32% between 2016/17 and 2020/21, whilst the number of hours of production increased by almost 37% during this period. The number of projects being made during this period fell slightly by around 4%. International financing of Canadian independent documentaries also increased overall, from \$44.4 million to \$76.1 million. These trends were driven by documentary series, that consistently made up most of the Canadian documentary sector during the five-year period studied in this report. In contrast, single-episode/one-off and feature-length (film or TV) documentaries experienced a relatively steady overall decline between 2016/17 and 2020/21. These trends were seen across the English-language and French-language markets.

# Documentary Production Budgets

Average per-hour production budgets for English-language documentaries fluctuated between 2016/17 and 2020/21. In three out of the five years, single-episode/one-off documentaries had the highest budgets per hour of all English-language formats in different years. In 2020/21, the average per-hour production budget for single-episode/one-off documentaries was \$376,353, followed by feature-length (film or TV) with an average of \$350,556. Documentary series had significantly lower per-hour budgets, at only \$289,115 in 2020/21.

Between 2016/17 and 2020/21, feature-length projects had the highest budgets per hour of all French-language formats with an average of \$398,485 in 2020/21. This was followed by single-episode/one-off documentaries, with an average of \$231,259. Similar to English-language productions, documentary series had the lowest average per-hour budgets ranging from a low of \$141,307 in 2019/20 to a high of \$153,892 in 2020/21.

# Financing of Documentary Production

Data from CAVCO suggests that between 2016/17 and 2020/21 the largest share of financing came from provincial tax credits (\$196.1 million), followed by the Canada Media Fund (\$169.4 million), Canadian distributors (\$148.2 million), and foreign sources (\$143.5 million).

In 2020/21, provincial tax credits made up almost 20% of total financing, increasing from just under 15% in 2016/17. Foreign sources also saw an increase in its share of total financing, more than doubling from 7% to almost 16%. While the amount of financing from Canadian distributors, private and public Canadian broadcasters, federal tax credits, and production companies increased between 2016/17 and 2020/21, their share of total financing dropped over the five-year period.

Similarly, although the Canada Media Fund continues to provide consistent financing to the industry (approximately \$35 million annually), its share of total financing also dropped from approximately 17% to 13% between 2016/17 and 2020/21.

Despite fluctuations in financing between 2016/17 and 2017/18, the overall financing for all formats of French-language documentary production has increased from \$76.2 million to \$101 million. Notably, there is considerably less (or close to no) funding from foreign sources and Canadian distributors for French-language documentary productions. Because broadcasters typically want French-language documentary productions to remain highly localized, it is challenging for them to sell their content internationally.

# Audiences for Canadian Documentaries

Viewership of Canadian documentaries spiked during the COVID-19 lockdowns, both within Canada and internationally. Viewers became more interested in true crime content, productions that were escapist in nature, and projects engaging with social issues.

Both English-language and French-language Canadian documentary television productions reached peak average weekly viewing hours in 2020, but declines in 2021 were minimal, suggesting that this trend will continue. Approximately half of English-language television documentary viewing hours are attributable to Canadian documentaries (as opposed to

foreign documentaries), though this percentage is in slight decline, particularly during peak period viewing hours. In contrast, the French-language television documentary market is much more heavily dominated by Canadian productions, with over three-quarters of viewing time, and no noticeable downward trend.

Canadian documentaries fared well at the Canadian box office in 2022, despite strong international competition. Canadian French-language documentaries or multilingual documentaries were noticeably more successful than English-only documentaries. 2022 was also a more successful year than 2021, hopefully indicating an upward trend.

# Key Trends, Challenges and Opportunities

The survey and stakeholder interviews provided further context for the data gathered above. The qualitative analysis revealed that documentary filmmakers continue to face many challenges, with the most critical challenges relating to funding. Specifically, survey participants selected accessing funding to create their films, navigating the bureaucracy of mainstream public funding systems, and accessing funding in marketing and promoting their films as the top 3 barriers they face as documentary creators.

Filmmakers and stakeholders also noted that the rise of streaming platforms has caused changes to distribution and how they reach their audiences. Although streaming has allowed creators to connect with larger and targeted audiences, it has also created a very competitive and crowded environment. Filmmakers employ a host of methods in finding

audiences for their films, including hiring a publicist, adopting an online promotion strategy, and hiring an impact producer.

Despite the growing emphasis on diversity and equity across the industry, filmmakers who identify as being part of equity-deserving groups face additional barriers as a result of their identities. Participants cited institutional bias, such as racial and gender bias, as a significant challenge, and felt that their projects were often overlooked due to their identities. Furthermore, several individuals from Black, Indigenous and other racialized communities feel their unique identities and experiences are oversimplified or misunderstood by decision-makers. However, filmmakers did note that the documentary community is more advanced on issues of inclusion compared to the broader film community in Canada and acknowledged good faith efforts to fund and promote more diverse stories in the country.

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Other observed trends in the industry include a tendency for documentary filmmakers to retain their IP ownership in Canada, with 70% of survey participants retaining their rights 76%-100% of the time. The value of documentaries in community building and storytelling was also stressed, with 43% of survey respondents indicating that they had made documentaries about themselves, their families, and communities.

Finally, when asked to define “Canadian content”, within the context of upcoming changes resulting from the Online Streaming Act, most filmmakers defined it as content where IP is owned by Canadians and where Canadians occupy most key creative roles. Respondents also emphasized that because of the unique styles and perspectives of Canadian documentary filmmakers, content did not need to be set within Canadian borders to be considered Canadian.