FRANCOPHONE CREATIVE INDUSTRIES IN ONTARIO

STATE OF THE FIELD

2024

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Executive Summary

This report provides an overview of the state of Francophone creative industries in Ontario. It includes a scan of overall activity, a compilation of challenges and opportunities affecting the sector overall and each subsector (music, film and television production, publishing, gaming), including opportunities to grow the sector in Ontario, across Canada and internationally. The report is based on an extensive literature review and stakeholder interviews with industry leaders conducted from December 2023 through March 2024.

The report begins with a summary of the development of Francophone cultural industries in Canada over the past sixty years, and provides a snapshot of the state of Franco-Ontarian creative sector today. It examines recent trends affecting touring and presenting, the production of new books, audio and video recordings and games that are brought to market yearly and reach audiences and readers across Canada and around the world.

The report concludes with a comparative analysis of policies, programs and practices supporting Francophone creative industries in two neighbouring provinces – Québec and New Brunswick.

Key findings

- Franco-Ontarian creative industries are diverse, highly specialized and active in markets throughout Ontario, across Canada and around the world.
- Franco-Ontario creative industries have extensive ties with an array of partners in Québec, across Canada and throughout *La Francophonie internationale*.
- The potential market for Francophone cultural products within Ontario is modest, and smaller than might be assumed. Students in French-language schools comprise the bulk of the potential market for Francophone cultural products in Ontario.
- Franco-Ontarian cultural products struggle to stand-out in complimentary markets such as Québec and *La Francophonie internationale.*
- While there are certainly Francophones working in gaming throughout Ontario, few studios are operated by Francophones or have French as their primary language of work. Moreover, games are not developed specifically for a Francophone market.
- Data specific to Franco-Ontarian creative industries is scarce.

Challenges

- Most organizations and businesses within Franco-Ontarian creative industries are small and have limited human and financial capacities. These constraints prevent them from fully seizing and capitalizing on market development opportunities.
- Changing demographics within Ontario's Francophonie pose serious challenges for those aiming to bring Francophone cultural products to audiences and readers.
- There is a chronic lack of training opportunities for Francophone creative industry professionals within Ontario.
- Barriers to gender equity continue to be numerous and significant across the sector.
- Franco-Ontarian creative industries do not compete on a level playing field with their Québec counterparts. Québécois creative industries receive more and more varied funding at home and benefit from several advantages when that give them an unfair advantage when it comes to reaching audiences and readers – both in Québec and in Ontario – compared to their Franco-Ontario counterparts.
- The trend toward attrition within Franco-Ontarian publishing is ongoing. It has led to a major drop (over 50%) in the number of new books published annually by Franco-Ontarian publishers.
- Fundraising challenges specific to the Franco-Ontarian context continue pose barriers that slow the rate of production of French-language films within the province.

Opportunities

- Market development in Québec and internationally is a key to growth now and in the long-term. The potential of complimentary markets throughout *La Francophonie* is significant.
- Building Ontario's Francophone brand could drive sales of cultural products and reach new audiences and readers at home, throughout Canada, and internationally.
- Increasing equity, diversity and inclusion in leadership roles throughout Ontario's Francophone cultural industries, in keeping with demographic trends within Ontario's Francophone population, could provide major assets for the sector, and help accelerate and sustain the development of new markets.
- Resource sharing, particularly with respect to expertise in communication and administration could strengthen businesses and organizations across the sector.

Introduction

In December 2023, *Ontario Creates* initiated a process to develop a detailed environmental report on Franco-Ontarian creative industries pertaining to music, books, magazines, film and television and interactive digital media sectors. This report provides detailed information about the challenges and opportunities specific to Franco-Ontarian content creators, organizations and companies working across these sub-sectors, including opportunities to grow the sector in Canada and internationally. This report is intended to help Ontario Creates assess ways that the agency can best support the growth of this segment of Ontario's creative industries.

Process overview

We first undertook an extensive literature review, examining nearly 5,000 pages of research, government reports, articles, and other documents published over more than fifty years pertaining to Francophone creative industries in Ontario. Our review also included publications pertaining to Francophone creative industries and Francophone minority communities in other parts of Canada. We conducted additional research in order to examine policies and programs supporting creative industries and Francophone minorities.

We subsequently conducted stakeholder interviews with 22 industry leaders throughout Ontario in an attempt to complete our overview of the state of the field, and to gain insight into current issues, challenges, and opportunities the organizations and businesses working in this sector are facing.

Background and Context

Snapshot of Ontario's Francophonie

While Québec is home the largest Francophone population in North America (6,513,000 Francophones) and to the majority (85.4%) of Canada's Francophone population[1], over one million Francophones live across Canada outside of Québec. Canada's largest Francophone minority community (652,540 Francophones), is in Ontario.[2] In 2021, the number of Ontarians who could have a conversation in French reached 1,558,670 individuals (11.1% of the population), the largest number ever recorded in a census in Ontario.[3]

Overall, Francophones represent 4.6% of Ontario's population.[4] Francophones are present in each region of the province, with the largest numbers in Eastern Ontario (290,665 Francophones) and Central Ontario (201,050 Francophones).[5] The largest concentrations of Francophones are found in Northeastern Ontario, (Francophones represent 21.3% of Ontario's total population in the region) and in Eastern Ontario (Francophones represent 15.4% of Ontario's total population in the region).[6] The number of Francophones in the province has been rising steadily since 1986, while the proportion of the population of the province that is Francophone has steadily decreased over this same period as Ontario's population has grown and diversified.[7]

Ontario's Francophone population is older than the overall provincial population. There are proportionately more Francophones in the 45 and over categories (50.6 % of Francophones/44.7% of total Ontario population), and proportionately fewer in the under 45 categories (49.4 % of Francophones/55.3 % of total Ontario population). The median age of the population of Ontario is 41, while the median age of Ontario's Francophone population is 44.6. The median age of the Francophone population is highest in Northeastern (50.8) and Northwestern Ontario (50.4). The proportion of

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[1] Government of Canada, Department of Canadian Heritage, *Some Facts on the Canadian Population*, 2019, page 1.
[2] Government of Ontario, Ministry of Francophone Affairs, *Report on Francophone Affairs*, 2024, page 3.
[3] https://www150.statcan.gc.ca/n1/pub/89-657-x/89-657-x2023017-eng.htm
[4] Government of Ontario, Ministry of Francophone Affairs, Op Cit., page 3.
[5] Ibid, page 4.
[6] Ibid.
[7] https://www.ontario.ca/page/profile-francophone-population-ontario-2016#section-2

Francophones aged 65 and over (19.5%) is higher than the proportion of people aged 65 and over (16.2%) in the overall population.[8]

Historically, Ontario's Francophone community tended to have lower incomes than the general population. However, in 2016, Francophones earned more than their counterparts in the general population. Francophones aged 55 years and over were an exception. Their median income was lower than that of other Ontarians in the same age group.[9]

The face of Ontario's Francophone population is changing as Francophone immigration has shifted significantly in recent decades. As recently as 2011, Europe was the leading continent of origin of Ontario's French-speaking immigrants.[10] Based on a 2024 report, the majority of Francophone immigrants to Ontario are born in Africa (41%) while Europe now (24%) places second.[11]In 2022, 5,3% of newcomers to Ontario were Francophone.[12] While the majority (59%) of Francophones in Ontario were born in the province, a significant proportion was born in Québec (18%) or outside of Canada (19%).[13]

French-language education has long been a pillar of Ontario's Francophonie. Indeed, French-language schools outside Québec have a dual mandate: providing quality education and fostering Francophone identity. As such, culture is often front and center in pedagogy and the school environment and schools are important access points to culture in Francophone communities. As of 2023, 113,120 students were enrolled in 350 French language elementary schools and 105 French language secondary schools in 12 different school boards throughout Ontario.[14]

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[8] https://www.ontario.ca/page/profile-francophone-population-ontario-2016#section-3

[9] https://www.ontario.ca/page/profile-francophone-population-ontario-2016#section-12

[10] https://www.ontario.ca/page/profile-francophone-population-ontario-2016#section-2

[11] Government of Ontario, Ministry of Francophone Affairs, Report on Francophone Affairs, 2024, page 5.

[12] Government of Ontario, Ministry of Francophone Affairs, *Report on Francophone Affairs*, 2023, page 7.

[13] Government of Ontario, Ministry of Francophone Affairs, Report on Francophone Affairs, 2024, page 5.

[14] Government of Ontario, Ministry of Francophone Affairs, *Report on Francophone Affairs*, 2023, page 9.

Development of the Francophone Cultural Sector and Creative Industries

Several seminal studies have documented the development of the Franco-Ontarian cultural sector over time. The earliest of these major reports – the St-Denis Report – was commissioned by Premier Robarts in 1967 and published in 1969. Over the course of nearly two years, the St-Denis Commission crisscrossed Ontario, documenting the state of French culture in communities large and small. The final report contains a regional analysis of Francophone communities, an exhaustive listing of Francophone activities and institutions, and a review of Francophones' contributions to various artistic and cultural practices. The report's key recommendations included the creation of a Franco-Ontarian Arts Office at the Ontario Arts Council (subsequently established in 1970) and a call for increased coordination between the ministries of Culture and Education with respect to strategic investments and development of the Franco-Ontarian cultural sector. The St-Denis report is widely viewed as the starting point for any longitudinal analysis of Francophone cultural development in Ontario.

At the time the St-Denis report was published, the bulk of Franco-Ontarian cultural institutions we know today were either non-existent or nascent. Indeed, the report mentions a large number of Francophone associations throughout the province, and a handful of Francophone cultural centers, but not a single organization whose sole mandate is arts or culture.[15]

The report lists four French-language publishers in Ontario, three of which are academic presses (*Éditions de l'Université Laurentienne* in Sudbury, *Éditions de l'Université d'Ottawa* and *Centre catholique de l'Université Saint-Paul* in Ottawa) and one publisher based in Gatineau (*Éditions des Deux Rives*) working with authors on both sides of the Ottawa River. The bulk of French-language works published at the time were historic or scientific, with a handful of novels, plays and books of poetry. The report indicates that the majority of works by Franco-Ontarian authors were published in Québec.[16] French language books were accessible in book stores on university campuses in Ottawa and Sudbury and a handful of public libraries throughout the province. The report indicates that no more than 25% of public libraries in Ontario budgeted for yearly purchases of French-language books, and that the majority of these libraries were in the Ottawa area.[17]

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[15] Comité franco-ontarien d'enquête culturelle, *La vie culturelle des Franco-Ontariens,* Ottawa, 1969, page 165.
[16] Ibid, page 174.
[17] Ibid, page 179.

The St-Denis report mentions no Franco-Ontarian musicians, labels or agents. The artists who have since come to be known as the founding generation or the first wave of Franco-Ontarian musicians (Robert Paquette, CANO, Garoulou, etc.) would emerge a few years later. They would sign contracts with major labels based in Toronto and Montreal, and their emergence coincides with the rise of French-language original music in Québec throughout the 1970s.

With respect to presenters, the St-Denis report mentions a handful of *boîtes à chanson* (privately-owned venues featuring touring singer-songwriters, most of them Québécois artists on tour), mostly in and around Ottawa. The report notes that touring artists had started to demand more significant performance fees and that their technical needs (amplification, lighting, etc.) had increased of late.[18]

The St-Denis report touches on cinema as an ever-increasingly important art form, and mentions that a small number of cinemas in and around Ottawa sporadically present films by Québécois or European directors, but mentions no Francophone filmmakers or film distribution companies in Ontario.[19] The report notes that only one television station broadcasts in French within Ontario (Radio-Canada).[20]

Another major report – *RSVP : Clefs en main* – was published more than twenty years after St-Denis and provides significant insight into the progress of the Franco-Ontarian cultural sector over time. In the intervening years, a number of Francophone cultural organizations had been established, including service organizations for Francophone musicians – *Association des professionnels de la chanson et de la musique* (APCM) and authors – *Association des auteure.s et auteurs de l'Ontario français* (AAOF). More than thirty Francophone cultural centers had by then been linked by a provincial service organization – *l'Assemblée des centres culturels de l'Ontario* (ACCO) for more than a decade. Francophone book publishers were in close contact with their counterparts across the country thanks to their national arts service organization – *Regroupement des éditeurs canadiens français* (RECF). RSVP confirms that the Francophone cultural sector was – by the early 1990s – developing in parallel to the Anglophone sector, with highly specialized organizations serving discipline-specific membership.[21]

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[18] Comité franco-ontarien d'enquête culturelle, Op. Cit., page 190.
[19] Ibid, 198.
[20] Ibid, 206.
[21] Groupe de travail pour une politique culturelle des francophones de l'Ontario, RSVP : clefs en main, Rapport final, 1991, page 17.

This highly-specialized, discipline-specific, support model continues to distinguish the Franco-Ontarian cultural sector from that of other Francophone minorities across Canada today. In New Brunswick for example, a single service organization – l'*Association des artistes Acadiens du Nouveau-Brunswick* (AAAPNB) – represents Francophone artists working in all disciplines.

RSVP made a significant distinction between creative industries in the context of the Francophone minority and that of the Anglophone majority: It points out that Francophone creative industries do not target mass consumption, a fact that still holds true to this day. Francophone cultural organizations and businesses, and the cultural products they create, are aimed at a subset of the population, a niche market distinguished by language, with limited opportunities for revenue generation. Hence, the report indicates that the differences between a Francophone cultural business and a not-for-profit are limited and that even businesses are more committed to providing culture for the Francophone community than generating profits for owners.[22]

RSVP also marks a major milestone in research on the Francophone Arts Sector in Ontario as it is the first report of its kind to address specific issues and systemic barriers faced by newcomers and Francophones of culturally diverse backgrounds. In particular, the report notes that culturally diverse Francophone creators have historically faced limited access to public funding.[23]

In 2017, nearly 30 years after *RSVP*, *l'Assemblée de la francophonie de l'Ontario* (AFO) commissioned a *White Paper on Franco-Ontarian Arts and Culture*, the most recent major study of the Francophone cultural sector in Ontario. The White Paper confirms that the sector continued to grow and consolidate during the years since RSVP. A network of more that 100 Francophone arts and culture organizations was now well established throughout Ontario.[24] A growing number of creative industry businesses (music producers, and labels, agencies, film and television producers, etc.) were also contributing to Ontario's cultural economy.[25]

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[22] Groupe de travail pour une politique culturelle des francophones de l'Ontario, Op cit., page 48.
[23] Ibid.
[24] Assemblée de la francophonie de l'Ontario, Livre blanc sur les arts et la culture, 2017, page 6.
[25] Ibid, page 9.

Indeed, Ontario's Francophone cultural sector has, for many years now, established itself as the largest across Canada, outside of Québec. For example, there are more Francophone film and television production companies based in and around Ottawa than there are in the entire province of New Brunswick. In fact, the number of Francophone media producers in and around Ottawa is greater than that of all the Maritime provinces combined.[26]

The *White Paper* raises several flags with respect to Francophone publishing, noting that several publishers had abruptly reduced or ceased operations altogether.[27] It also notes that Francophone bookstores in Toronto, Sudbury and North Bay had recently closed their doors, decreasing access to French-language books throughout the province, and bringing the total number of Franco-Ontarian bookstores to six.[28]

The *White Paper* also reports that many Francophone performing arts venues throughout the province, networked through *Réseau Ontario*, were in a fragile state due a chronic and prolonged lack of core public funding. It mentions that the majority of Francophone performing arts venues had obsolete performance spaces and technical resources that greatly limited the types and scales of productions they could present and, consequently, hindered the experience for audiences. Due to these combined factors, and to downward trends in attendance, aging Francophone audiences and a growing disconnect between what presenters were bringing to town and what changing communities were interested in, several presenters were on the verge of ceasing their activities and many workers at the helm of Francophone presenters were on the verge of burn-out.[29]

Historically, ties between Francophone communities across Canada have been numerous and strong. In the cultural sector, most Francophone cultural organisations or businesses outside of Québec are linked via national member-service organizations (ex.: *Fédération culturelle canadienne française – FCCF*, *Alliance nationale de l'industrie musicale – ANIM*, *Association des producteurs de la francophonie canadienne – APFC*, *Regroupement des éditeurs de la francophonie canadienne – REFC*, etc.) These organizations convene leaders within the sector for training

[26] Analysis of membership of *l'Association des producteurs de la Francophonie Canadienne*, as of February 2024.
[27] Assemblée de la francophonie de l'Ontario, Op. Cit., 2017, page 13.
[28] Ibid, page 22.
[29] Ibid, page 24.

opportunities, to discuss long-term strategy, to work together on collective advocacy or research and to build and sustain relationships and winning partnerships.

Likewise, connections between Francophone cultural organizations in Ontario and in Québec have also long been numerous and varied. Most Francophone service organisations have discipline specific counterparts in Québec (ex.: *Association nationale des éditeurs de livres* – ANEL – for publishing, *Association Québécoise de l'industrie du disque, du spectacle et de la vidéo* – ADISQ – for music, *Union des Producteurs et Productrices du Cinéma Québécois* – UPPCQ – and *Association Québécoise de la Production Médiatique* – AQPM – for producers, *Association des réalisateurs et réalisatrices du Québec – ARRQ* – for filmmakers, *Association professionnelle des diffuseurs de spectacles* – RIDEAU – and *Réseau des Organisateurs de Spectacles de l'Est du Québec* – ROSEQ – for presenters, etc.) In many cases, ties between these organizations are more frequent than those between Franco-Ontarian organizations and their Anglophone counterparts within Ontario.

Moreover, Franco-Canadian creative industries have maintained close ties with a number of Federal cultural institutions. For decades, the only Francophone filmmakers in Ontario produced films in collaboration with the National Film Board (NFB). Similarly, *Musicaction* has played an active role in the development of the Franco-Ontarian music industry, supporting distribution, promotion, market development and recording on an ongoing basis. In 2022-2023, Musicaction's support for projects by Francophone minority communities outside Québec totaled $2,4 million, while spending on projects from Ontario totaled $803,680.[30]

[30] Ibid, pages 21-22.

State of the Field

The following table is intended to provide a snapshot of who is doing what in Franco-Ontarian creative industries today. Our starting point was a scan of the membership of various service organizations. We subsequently examined a list of recent *Ontario Creates* grant recipients, and conducted additional bench research. This list does not include academic presses or university campus bookstores. It is worth mentioning that we have excluded French-language schools as "presenters" here. Several stakeholders we interviewed underlined the importance of schools as presenters of Francophone arts and culture in communities throughout the province. Indeed, some music producers indicated that schools were the primary touring network for Francophone performing artists in the province. However, there is currently no data available to the public regarding what is being presented where, at what cost, to what audiences, etc. We suggest the numbers in this table should serve as a baseline, as it is probable that there are more active groups than those we have identified. We have limited our search to organizations and businesses working in French, serving primarily Francophone members or demonstrating an active effort to communicate in French.

Type of organizations	Number	List	Communities
Service organizations	11	AAOF, ACO, APCM, Réseau Ontario, FRIC, ANIM, APFC, DOC, FCCF, Scènes francophones, Interactive Ontario	Ottawa, Toronto
Book publishers	5	Éditions David, Prise de Parole, L'interligne, Terre d'accueil, Éditions Malaïka	Oshawa, Ottawa, Sudbury
Book fairs	3	Salon du livre Afro Canadien, Salon du livre du Grand Sudbury, Salon du livre de Toronto	Ottawa, Sudbury, Toronto
Book stores	5	Librairie du Soleil, Librairie Panache, Librairie Le Nord, Librairie Mosaïque, Librairie du Centre franco ontarien de ressources pédagogiques	Ottawa, Sudbury, Hearst, Toronto

Music producers, agents, managers	7	LAFAB musique, Le Réveil, Intello Productions, AMP-EM, Amixie, JKB, 49e Parrallèle	Ottawa, Toronto
TV, film producers	11	2 Coyotes production, ATO Média Inc., Balestra, BLIKTV, Carte blanche films Inc., Moi & Dave, Orange iceberg media, Productions Sahkosh Inc., Slalom, Productions Testa Inc., Zazie Films,	Ottawa, Toronto
Presenters	23	Centre culturel Frontenac, Centre culturel Le Chenail, Centre culturel Les Trois P'tits points, La Nouvelle Scène, Maison de la Francophonie d'Ottawa, MIFO, Centre culturel La Ronde, Les Compagnons des francs loisirs, Centre culturel Louis Hémon, Centre régional des loisirs culturels, Conseil des arts de Hearst, La Slague du Carrefour francophone de Sudbury, Alliance française de Toronto, Carrefour communautaire francophone de London, Centre francophone de Hamilton, Conseil des organismes francophones de la région de Durham, La Clé, Conseil des arts de Nippissing Ouest, Place des arts de Sudbury, Afrique nouvelle musique, Festival franco-ontarien, La Nuit sur l'Étang, Festival du loup	Kingston, Hawkesbury, Alexandria, Ottawa, Orléans, Timmins, North Bay, Chapleau, Kapuskasing, Hearst, Sudbury, Toronto, London, Hamilton, Oshawa, Penetanguishene, Sturgeon Falls, Lafontaine

Recent changes and trends

The trend toward attrition in publishing that had been documented in previous reports has continued. Over the past several years, the province's only two Francophone literary periodicals (*Liaison* and *Virages*) ceased publications. Gone too are two long-established Francophone book publishers (*Éditions du Vermillon* and *Éditions du GREF*). Both the *Salon du livre de Hearst*, and *Salon du livre de l'Est ontarien* were shuttered. Most recently, the province's northernmost Francophone book store, *Librairie du Nord* in Hearst, announced that it would no longer be taking new orders.

Happily, there have also been a number of positive changes of late. For the first time since 2016, Sudbury's Francophone community once again has a French-language book store thanks to the opening of *Librairie Panache* in February 2024. Also, the work of culturally diverse Francophone writers is becoming ever more prominent in the Franco-Ontarian literary landscape, as shown by the success of *Éditions Malaïka, Éditions Terre d'accueil*, and the *Salon du livre Afro-Canadien.*

There have been notable changes with respect to Francophone music presenters in Ontario. Several long-standing presenters have stopped cultural programming or ceased operations altogether (Artem – New Liskeard, Centre francophone de Toronto - Toronto, Centre culturel francophone Jolliet – Sarnia, Centre communautaire de Chatam-Kent La Girouette – Paincourt). The drop in cultural programming in the South-West region of the province is alarming in that it furthers a trend that began more than a decade ago. Francophones in communities from Niagara to Windsor are now hard-pressed to find French-language performances within several hundred kilometers of their homes. On a more encouraging note, several new presenters have emerged in Ottawa, Toronto and as far North as Thunder Bay (*Maison de la francophonie de l'Ouest d'Ottawa*, *Alliance française de Toronto*, *Théâtre français de Toronto*, *Club culturel francophone de Thunder Bay*).

It is worth mentioning that Contact Ontarois, established in the late 1970s and Canada's longest-running Francophone performing arts market outside of Québec, continues to be a pillar of touring activity and an important occasion for Franco-Ontarian presenters to gather, share best practices, etc. However, the format of the event has been questioned in recent years. Réseau Ontario, who have organized the event since 2001, are working to refresh the event and ensure its continued relevancy for the sector.

Stakeholder interviews provided several insights with respect to volume of production that are worth noting:

Music

The annual volume of production has been roughly consistent for the past two decades (approximately 5-12 new albums; 12-20 singles; 3 to 10 EPs per year). Over the past five years, the trend has been toward increasing numbers of shorter-length recordings (EPs and singles), in keeping with trends throughout global markets.

Publishing

Franco-Ontarian book publishers have published 30 to 50 new titles per year over the past three to five years. This marks a significant drop in the volume of production. Interviewees confirmed that more than 100 titles per year had been published for many years. Compared to a decade ago, the annual number of new French-language publications in Ontario is down between 50% and 66%. This is largely due to the closure of several long-established Francophone book publishers in the province. Moreover, no French-language literary periodical has been published in Ontario since 2018. Taken in combination with the disappearance of several Francophone book stores and *salons du livre*, the state of the Ontario's French-language book industry is alarming.

Film and TV production

Interviews indicate that 2 or 3 feature-length films have been brought to market since 2010. Stakeholders report that Telefilm has recently stated their objective of funding at least one feature-length French-language film outside of Québec every year which could significantly bolster the volume of production over time.

Interviewees report that the number of productions for TV remains significant and that several shows have successfully reached audiences across the country, in Québec and elsewhere in *la Francophonie internationale*. There is no publicly available data regarding volume of production of short films and production for TV or the web. While funders publish lists of projects that receive public funding from one year to the next, no one has compiled data from available sources or tracked what stage of the process projects have reached (writing, development, production, broadcast, etc.).

Interactive

There is no publicly available data on French-language production in Ontario. Stakeholder interviews indicate that it is unlikely that any major project aimed exclusively at Francophone markets has been developed. However, it is clear that a number of games are produced every year with French-language play options. Interviews also confirmed that a limited number of small-scale interactive productions, aimed at Francophone markets and available exclusively on broadcasters' or corporate websites have been developed.

The Franco-Ontarian Market

Our research provides an overview of the number and range of organizations and businesses that constitute Franco-Ontarian creative industries, a basic sense of the level of activity and trends across the sector. But we have precious little data providing insights into the Francophone market in Ontario. Even our analysis of the volume of production across Franco-Ontarian creative industries is partial due to a lack of publicly available data. We have clear numbers with respect to French-language books published in Ontario from one year to the next and partial information on the number of recordings produced. But, we do not know how many TV productions by Franco-Ontarian producers were completed or aired, how many Franco-Ontarian artists toured throughout Ontario, how many performances they offered, what they were paid, how many people attended, how many streams or downloads there were of audio or visual recordings, etc. The only substantial market research in the field that seems to have been completed over the past twenty years are a small number of feasibility studies and audience research for a handful of performing arts venues. Such research is unavailable to the public, site specific, and beyond the scope of this project.

Given the information on hand, and given that age of population and household buying power are widely seen as predicators of cultural participation[31], our starting hypothesis would be that the Franco-Ontario market is fairly modest.

One factor that often goes unmentioned but greatly affects the market for cultural products is literacy. Ontario's Francophones are, on average, less literate that the

[31] Saire, Pierre-Olivier, Rosaire Garon, Martin Tétu, Sophie Dubois Paradis et George Krump, « Étude des publics des arts de la scène au Québec », Groupe de travail sur la fréquentation des arts de la scène, Montréal, 2020, page VIII.

province's Anglophone majority.[32] A 2013 report noted that overall, 15% of adult Ontarians have only "Level 1" literacy, meaning they struggle to read even basic words, and 32% of adult Ontarians have "Level 2" literacy, only slightly better.[33] One francophone organization working in adult education reports that illiteracy affects 48% of Ontario's Francophone population.[34] Over and above any considerations such as access to cultural products, available leisure time and disposable income, affecting cultural participation throughout the general population, literacy can be seen as a major systemic barrier. Nearly half of Ontario's Francophones are unable to substantially engage with written French. This means Francophones are less likely to respond to written promotional materials intended to reach audiences (whether they are posters on display in local shops, reminders distributed to parents via French-language schools, adds or articles published in French-language newspapers, etc.). It also means that nearly half of Ontario's Francophones could not read a French-language book if it was placed in their hands.

Some meaningful work pertaining to the potential market for French-language books has been done and seems to confirm our basic hypothesis. This work posited that avid readers in the Franco-Ontarian context comprised roughly 3% of the base of potential readers in the population.[35] Given a 48% rate of functional illiteracy in the province's French population, we estimate the base of potential French readers in Ontario to be approximately 300 000 people. If we estimate avid readers comprise 3% of that base, we deduce that the number of avid readers within Ontario's French population is less than 10,000 people.

One additional element of information that helps us approximate the potential market for Francophone cultural products in Ontario pertains to digital literacy. Research shows that 78% of the province's adult Francophones face challenges in the area of digital literacy.[36] Using this insight, we estimate that the adult Francophone population

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[32] Garceau, Marie-Luce, *Alphabétisme des adultes en Ontario français : Résultats de l'Enquête internationale sur l'alphabétisation des adultes*, 1998, page 19.
[33] Statistics Canada, Skills in Canada: First Results from the Programme for the International Assessment of Adult Competencies (PIAAC), 2013, page 17.
[34] *Coalition ontarienne de formation des adultes:* https://www.coalition.ca/ma-cofa/context/
[35] Marc Haentjens, La circulation des livres au Canada français : À la recherche du public lecteur, Liaison, Numéro 129, 2005, page 9.
[36] Assemblée de la francophonie de l'Ontario, Position Statements : Recommendations by and for the Franco-Ontarian Population, 2019, page 9.

in Ontario that is functionally literate in French and able to navigate online in French stands at approximately 46,318 people. Based on the information we have and on the premise that individuals who are functionally illiterate in French and unable to navigate online in French are unlikely to be significant consumers of Francohone culture and cultural products, we therefore posit that the total potential adult market for Francophone cultural products in Ontario stands somewhere between 9,710 and 46,318 people.

In order to complete our approximation of the potential market for Francophone cultural products in Ontario, it is it is essential to bear in mind that there are more than 100 000 students currently enrolled in French-language schools throughout the province who are required to consume Franco-Ontarian culture as per the curriculum. Adding the number of students to the potential adult market number allows us to project that the total potential market for Francophone cultural products in Ontario likely stands somewhere between 122,830 and 159,448 people.

This range is very much a ballpark. At best, it is incomplete. It doesn't account for Francophiles, French-emersion schools, Francophones who attend performances based solely on word of mouth, doesn't account for degrees of interest or participation, etc. But, it does give us a starting point, a preliminary sense of the base market for Francophone cultural products within Ontario.

It should also be noted that there are several significant markets for Ontario's francophone creative industries beyond the province's borders. Québec, with more than 6.5 million francophones, is culturally vibrant and is chief among the markets Ontario's creative industries aspire to tap. But competition for the Québec market is ferocious. With only a few exceptions over the past fifty years, products from Québec dominate the Québec cultural market.

Québec is far from the only complementary market for Ontario's Francophone creative industries. There is also a large French speaking population south of the border (recent estimates indicate that somewhere between 3.5 and 11 million Americans speak French[37]) that remains largely untapped.

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[37] https://francophoniedesameriques.com/zone-franco/la-francophonie-des-ameriques/amerique-du-nord/etats-unis

Moreover, stakeholders reported numerous relationships and collaborations with peers in many member countries of *La Francophonie Internationale* (i.e.: France, Belgium, Switzerland, Morocco, Cameroun, Burkina Faso, Ivory Coast, etc.) Seen individually, each of these countries provides an intriguing complimentary market. Taken together, la *Francophonie* clearly represents a compelling critical mass of cultural consumers. The challenges of bringing Ontario's cultural products to market and distinguishing them from the array of other products available internationally, remain considerable.

Cross sectoral analysis

Challenges

As is the case with their Anglophone counterparts in Ontario and peers around the world, Ontario's Francophone creative industries have faced a bevy of challenges in recent years. Rapidly changing digital technology has forced creative industries to constantly innovate and pivot. Television, film producers and interactive designers have expanded their business models to produce online content. The global pandemic compelled presenters to imagine new ways to connect virtually with audiences and drove service organizations to change the ways they work to support their members. Many stakeholders have reinvented themselves, scaled down operations, distributed work differently, reduced staff size and outsourced various components of workload. Some have done away with physical office space altogether. The following section digs into a number of challenges that are broadly shared across all sub-sectors within the creative industries.

Capacity development

There was a broad consensus among the stakeholders we interviewed with respect to issues pertaining to financial and human capacity. Organizations reported they were underfunded, that core public funding had been stagnant for many years and that they felt ever-increasing pressure to juggle multiple project grants in order to keep delivering meaningful services and, in some cases, just to keep the lights on.

The vast majority of stakeholders that we spoke with are small. Most reported FTE of 1 to 5 staff and annual revenues ranging from 50K to just under 1 million dollars. The vast majority of interviewees, both not-for-profit and businesses, described their situation as "fragile". Several business owners reported having to work for extended periods without taking salary in order to successfully manage cash flow.

Many interviewees reported that they lacked the staff required to fully meet their goals, or to do so in a somewhat less frenzied, stressful, work environment. Business owners in particular were extremely anxious regarding their ability to provide competitive salaries and attractive working conditions. Several indicated that the realities of the cultural sector were such that managing cash flow was a perpetual challenge, and retaining staff in such an environment was incredibly difficult.

Virtually all business owners indicated that growing their business was a tremendous challenge. They confirmed that there was inevitably a period of investment and expenditure before strategic development led to new revenue streams or increased revenues that were able to sustain growth. This period requires either strategic reserves to shoulder the cost of development – a luxury few businesses in the Francophone creative industries can afford – or the ability to manage cash flow in an environment that is hard to predict. Several owners stated that they had to lay off qualified, competent, staff or renounce potential expansion opportunities because the financial risks and pressures were just too much to handle. Several stakeholders voiced the need to build capacity in order to better seize market development opportunities and to expand their reach both in Ontario and elsewhere in a sustainable way.

Connecting with audiences

Demographic changes are affecting the ties between Franco-Ontarian presenters, producers and audiences. Over time, audiences in Francophone communities have trended older. Simultaneously, historically Francophone communities have seen several generations of young people move to urban centers to pursue career opportunities. Interviewees reported a growing age gap in Francophone audiences throughout the province, mentioning that younger Francophones tend to sever connections with Francophone institutions after high school.

Moreover, Francophone immigration has diversified the interests of local audiences and the sources through which they access cultural experiences. These factors have combined to reduce audience numbers and revenues from ticket sales, compounding financial pressures many presenters are facing. Some presenters, who have long relied on word of mouth and the strength of individual relationships and established networks in their community as their principal means of promoting performances, mentioned struggling with a sense of disconnectedness from their audiences.

Education

Many interviewees deplored the lack of access to basic training and ongoing professional development opportunities for workers in creative industries. The list of positions across the sector where qualified staff are hard to come by is extensive: administrators, bookkeepers, communication experts, sound and lighting designers, publishers, bookstore operators, etc. There are French-language jobs waiting to be filled throughout the province. And yet, precious few programs covering these professions are available in French, within Ontario[38].

The lack of training opportunities means Francophones aspiring to a career in creative industries face an existential dilemma. They can either stay in Ontario and study in English, or pursue their education in French by enrolling in one of the programs offered in Québec's postsecondary institutions.

Many stakeholders felt that Francophone post-secondary institutions throughout the province were missing opportunities to provide innovative programs that would simultaneously meet the needs of prospective students, cultural organizations and businesses on the ground. They perceived this as a lack of commitment to the Francophone community on the part of postsecondary institutions and leaders. Several stakeholders mentioned that recent cuts to Francophone staff and programs at Laurentian University have had a lasting, devastating, effect on the Francophone cultural sector, locally and throughout the province. Several interviewees cited the former *Technique et gestion de scène* program offered at Collège Boréal[39] as an example of a postsecondary institution being initially attuned to the needs of the cultural sector and then eventually succumbing to bureaucratic and financial pressures.

Women in creative industries

Recent research on women in the Canada's music and tv-film industries has shed some light on deep, lasting, barriers to equity, across creative industries. An over-representation of women in "supporting roles" and under-representation with respect to executive leadership, difficulty with career advancement, lower pay, widespread harassment and shorter careers are among the key issues that have been flagged.[40] A recent study on artists in Francophone minority communities across Canada, found a

[38] Our scan found French-language postsecondary courses or programs within Ontario in: accounting, social entrepreneurship, business administration, public administration, HR management, animation, interactive arts, graphic design, digital content creation, project management, television production, marketing and digital culture.
[39] Offered from 2011 to 2017, the program supported the basic training for Francophone stage managers, sound and lighting designers and other skilled technicians.
[40] Bissonnette, Joëlle, *Les femmes dans l'industrie musicale canadienne francophone*, réalisé pour et avec la collaboration de la Fondation Musicaction, grâce à l'appui du Gouvernement du Canada, 2022, pages 13-14.

27% gap between median annual income of women vs. men.[41] Given these issues, it is not surprising that women have reported substantially lower satisfaction with their careers than their male counterparts.[42]

Interestingly, research also indicates that women in a Francophone minority context are more likely to start their own businesses.[43] However, it also found that limited access to start-up funding was one of the main barriers to career advancement reported by women entrepreneurs.[44]

The stakeholders we spoke with confirmed the range of issues affecting their careers within Franco-Ontarian creative industries. Several reported having faced harassment, or routinely feeling undervalued or condescended to by their male peers. Most reported that mentoring had been a key to their career progression and expressed sincere gratitude to their mentors and a keen interest to participate in future mentoring programs as a way of supporting future generations of women in the sector.

Relationships with Québec

The ties between Ontario's Francophone creative industries and their counterparts in Québec are numerous and varied. Interviewees reported ongoing relationships with 21 partners in 10 communities throughout Québec. However, most interviewees were unaware that Ontario and Québec were signatories of bilateral agreements or that culture figured prominently within these agreements. Organizations indicated that they fostered ties with Québec partners with the help of funding from the Federal government and the Government of Québec (*Secrétariat aux relations canadiennes – Programme d'appui à la francophonie canadienne*). Some stakeholders mentioned – with great appreciation – that they had benefited from funding from Ontario Creates in order to attend trade shows or showcase events in Québec.

Interviewees felt that cultural trade with Québec was not on a level playing field. Many stakeholders noted that it is far easier for Québécois artists to tour in Ontario than for their Ontario counterparts to tour in Québec. Several stakeholders stated that they

[41] Anne Robineau, Un regard actuel sur la situation des artistes dans la francophonie canadienne : Rapport final, Institut canadien de recherche sur les minorités linguistiques, 2013, page 96.
[42] Nordicity, Op. Cit., page 27.
[43] Joëlle Bissonnette, Op. Cit., page 43.
[44] Ibid, page 48.

believed the majority of artists touring in Francophone performing arts venues in Ontario were Québécois. They gave examples of what they deemed "dumping" by Québec artists and producers (booking performances in Ontario at rates Franco-Ontarian artists could not compete with due, in part, to higher levels of funding available for Québec artists and producers). Publishers pointed out that books by Québec publishers and Québécois authors dominate Francophone book stores and *salons du livre*, and that the vast majority of books purchased by Ontario's French-language schools are by Québécois authors. Some are even bought in bookstores or through distributors in Québec. Film and TV producers confirmed that the overwhelming majority of French-language content on the airwaves in Canada is produced in Québec and features Québécois creators whereas productions from Ontario struggle to garner viewership in Québec.

Many stakeholders bemoaned the historic and ongoing challenge for Franco-Ontarian producers and creators to make their mark in Québec. Publishers noted that Québécois bookstores frequently placed books by Franco-Ontarian authors and publishers in the "international" section, along with titles from France. They reiterated that while Ontario – and all other Francophone communities across Canada for that matter – constitute secondary markets for Québec's cultural sector, many of Ontario's Francophone creative industries target Québec as their primary market. Stakeholders indicated that cultural trade with Québec lacked reciprocity and hoped the government of Ontario would insist on this principle in its dealings with *La Belle Province*.

The lack of data on the Francophone market in Ontario stands in stark contrast to Québec. We have some data about Ontario and Canada as a whole, but it is fragmented and per sector, and little or none of it is specific to Francophones in Ontario. On the other hand, various agencies of the Québec government track and report on cultural activity throughout the province. Thanks to their work, we know there are nearly 200 professional performing arts venues throughout Québec[45] and that, in 2018, nearly 2/3 of Québécois over the age of 16 had paid to attend a performance (4.5 million individuals; 22.3 million individual tickets sold).[46] We know that individuals who attended more than ten performances per year make up 13% of Québec's population, but that they are responsible for 44% of ticket sales in the province.[47] We

[45] https://associationrideau.ca/fr/membres/decouvrir-nos-membres
[46] Saire, Pierre-Olivier, Rosaire Garon, et al., Op cit., page VIII.
[47] Ibid.

know that, in 2015, the average household in Québec spent $2,751 on culture, 37% of it on cultural products.[48]

We know that live streaming audio in Québec has increased exponentially over the past few years (4,8 million streams in 2021, nearly 28 million in 2023) while sales of sound recordings (whether hard copy or online) have simultaneously collapsed (more than 4 million albums sold in 2018; just over 1.3 million sales in 2023).[49]

We also know there are approximately 100 French-language book publishers in Québec and that in 2022 they published 5,946 titles (3,870 electronic titles).[50] In 2022, sales of new titles published in Québec totaled $ 677.8 million dollars, up 4.1% over 2021.[51]

Government sources not only confirm the number of television and radio stations throughout Québec (23 and 108, respectively, as of 2022) but also report total revenues generated by private television ($375,582,000 in 2022) and radio stations ($236,044,000 in 2022).[52] Thanks to the Léo-Ernest-Ouimet database, we even get weekly updates regarding ticket sales for each film being shown on one of Québec's 714 cinema screens.[53]

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48 Marik Danvoye, Dépenses des ménages québécois pour la culture et les médias de 2010 à 2015, Optique culture, numéro 62, octobre 2018, page 1.

49 https://statistique.quebec.ca/en/document/music-recording-consumption-quebec-since-2002-annual-data/tableau/number-of-sound-recordings-sold-annually-by-type-of-product-quebec

50 https://statistique.quebec.ca/en/document/printed-and-digital-publications-statistics/tableau/printed-digital-monographs-published-received-legal-deposit-publishing-language

51 https://statistique.quebec.ca/en/document/new-book-sales-by-outlet-category-quebec/publication/ventes-de-livres-neufs-selon-la-categorie-de-points-de-vente-faits-saillants-2020

52 https://statistique.quebec.ca/en/document/principal-statistics-private-commercial-television-radio-stations-quebec/tableau/radio-and-television-broadcasting-number-of-stations-revenue-and-operating-benefits-quebec

53 https://statistique.quebec.ca/en/document/number-and-characteristics-of-operating-film-establishments-quebec/tableau/number-and-characteristics-of-operating-film-establishments-quebec#tri_regn=0&tri_etabl=1&tri_entrep=5

These data sources provide substantial insights into the creative industries in Québec and into the largest Francophone market in North America. The size of the potential market is the prime reason why Québec is so attractive to Franco-Ontarian creative leaders. Just across the river, a market approximately 40 times greater than the one at home is passionate about culture.

Opportunities

International market access and development

Nearly all interviewees mentioned international opportunities among their priorities for the coming years. The existing network of relationships between Franco-Ontarian creative industries and partners abroad seems varied and impressive. Stakeholders mentioned partnerships with 20 organizations in 13 different countries during our interviews. The nature of existing ties with international partners varied from one-off attendance at a performing arts market, to showcasing at trade missions, to international residencies, to hosting delegations of international partners during Francophone cultural markets, to licensing for broadcasting and distribution and reciprocal agreements. It is worth noting that the majority of existing partnerships are with organizations and businesses in member-countries of *La Francophonie internationale* and may be of strategic interest to the government of Ontario.

Many stakeholders reported that although they continued to be keen to participate in exploratory missions abroad, they had thus far developed relationships that remained largely symbolic due to a lack of capacity. Stakeholders pointed out that following-up on opportunities abroad requires time and energy, and that they are already stretched thin. Several interviewees stated that they had a number of international market opportunities they were keeping on the back burner because of other priorities here at home. Stakeholders mentioned that they would need to hire new staff in order to capitalize on business opportunities that could open new markets through licensing, distribution and publishing agreements.

Several stakeholders also noted that true international market development and business development was predicated by the ability to reciprocate. They reported that several international partners were ready to showcase or tour Franco-Ontarian artists, promote or distribute Franco-Ontarian books or license broadcasting for Franco-Ontarian video productions, but that foreign partners expected similar opportunities to be provided in Ontario.

Building a "Francophone Ontario" brand

At a time when globalization has greatly eased and accelerated access to cultural products from around the world, stakeholders felt there was important work to be done to build the brand and brand recognition of Franco-Ontarian cultural products. A number of Interviewees noted that when they have made forays into markets beyond Ontario, their work is buried in the abundance of products emanating from around the world. Interviewees cited numerous examples of campaigns to bolster the "brand" of cultural products elsewhere, including several from Québec (*Games From Québec*, *Je lis Québécois*, *Le Panier Bleu*, etc.) Gaming interviewees noted the Made in Ontario campaign on Steam.

Stakeholders also noted that some initiatives had already contributed to raising the profile of Franco-Ontarian cultural products – both at home and elsewhere – notably awards such as the Trillium Book Award and *Prix Trille Or*, etc.

Making the existing network more diverse and inclusive

Several interviewees pointed out that the leadership (management, boards, owners, etc.) within the Franco-Ontarian creative industries does not adequately reflect diversity within Ontario's Francophone population. They acknowledged that additional efforts would have to be made to make the existing not-for-profit network more inclusive. A number of stakeholders conveyed enthusiasm at the prospect of their changing, ever-more-diverse memberships and felt that this diversity was a tangible asset for their subsector.

Several stakeholders reported that diverse producers or publishers were opening new markets, at home and abroad, reaching audiences and readers that had not previously engaged with the Franco-Ontarian cultural network. Some interviewees noted that culturally diverse francophone producers and businesses were bypassing historic markets altogether (Québec, English Canada, etc.) and successfully establishing business relationships and reaching audiences and readers in parts of Europe and North Africa. They noted that each of these success stories constituted a case-study for others in the Franco-Ontarian cultural sector could learn from, attempt to replicate and build on.

Working strategically across silos

Faced with chronically limited capacity, several not-for-profit stakeholders expressed that they had started to examine new approaches to getting the work done. Chief among them, they were working with their peers to explore opportunities to share the cost of certain services (bookkeeping, communications, marketing, government relations, etc.) Several interviewees reported that they no longer had the means to retain full time staff with certain expertise, and did not require a full-time employee to meet the needs of the organization, membership or sector. Some business leaders, stated curiosity at the prospect of sharing contractual workers with their peers, thereby retaining experienced professionals, or building capacity while sharing the overhead. Several interviewees felt the timing was opportune to reimagine the ecosystem and the way it operates in support of Franco-Ontarian creative industries in order to build the support systems that are needed for the next generation, rather than struggling to perpetuate organizational and working models that are no longer viable. Some interviewees felt that leaders within the sector should initiate conversations about how to pool resources and eliminate redundancies and waste before funders imposed cuts, forced mergers and downsizing.

Sector specific analysis

Publishing

Overview There is cause for significant concern about the overall health and long-term well-being of the Franco-Ontarian publishing sector. Over the past decade, French-language literary periodicals have completely disappeared, several well-established Francophone book publishers and book stores have been shuttered, *salons du livre* in Northern and Eastern Ontario have ceased operations. During this same period, the total number of new French-language books published annually has dropped substantially. That said, the quality of publications remains high, and Franco-Ontarian book publishers still figure prominently on the lists of nominees and recipients for a number of prestigious prizes. There is also positive change within the field. In particular, new publishers, and a new salon du livre, have emerged who are focused on the work of Francophone authors of culturally diverse backgrounds. It is worth noting that while Franco-Ontarian publishers have become leaders in new book formats, interviewees reported limited uptake on ebooks and audiobooks. Paper books continue to be the predominant source of sales.
Challenges • *Succession Planning*: Over the past decade, most Franco-Ontarian publishers have worked on succession planning. However, only one – *Les Éditions David* – successfully navigated a transition at the top during this period. A lack of French-language programs allowing students to learn the trade reduces the potential pool of qualified candidates to take the helm of Francophone book publishers, and this has made the delicate task of leadership transitioning all the more difficult.[54] • *A lack of support from Ontario's French-language education system*: Schools and school boards have limited book-buying budgets. In an effort to stretch their buying power and get the most for their buck, they systematically seek out the best prices available. In many cases, this leads French-language school boards and schools to buy Franco-Ontarian books at a discount from book stores in Québec.

[54] Only one such program exists at present, at *l'Université de Sherbrooke*.

- *Competing with Québec*: Books published in Québec and by Québec authors have long been more readily available in Ontario than books by Franco-Ontarian publishers. Interviewees pointed out that Québec's publishing sector spends considerable sums on promotion and marketing. Moreover, players in the Québec publishing sector strategically pool funds and work collectively to build the brand profile and market share of Québec books. The recent *Je lis Québécois* campaign is a case in point. Franco-Ontarian publishers compete with their Québécois counterparts for the Ontario market and in the much larger Québec market, with limited capacity, means and support.

- *Market development*: Franco-Ontarian book publishers have significant networks across Canada, in Québec and internationally. What they lack is adequate budgets for promotion and marketing and dedicated staff to follow-up on leads, sustain relationships and seize opportunities both at home and abroad. Several stakeholders also mentioned that it would be helpful to have access to seed money for partnership development or for pilot projects, over and above current funding to attend international market events.

Opportunities

- *Pooling resources*: Several stakeholders raised the prospect of partnering with other organizations and associations in the Franco-Ontarian publishing sector to promote Franco-Ontarian books, build a brand, and increase market share in Ontario and Québec.

- *Reaching new markets*: Many stakeholders indicated that the increased prominence of culturally diverse Francophone organizations and writers in Ontario may prove tremendously beneficial for the sector, in particular with respect to building ties in new markets. A number of diverse Francophone writers have publishers and distributors in Canada, Europe and Africa or the Caribbean. Stakeholders felt certain this would lead to new collaborations with partners abroad.

- *Books for young readers*: Several interviewees noted a rise in interest for and sales of certain types of publications for young readers, graphic novels in particular. They noted that finding Francophone illustrators in Ontario for these publications posed something of a challenge.

Music

Overview Global trends have transformed the music industry over the past decade. Stakeholders confirm that CD sales have all but disappeared, online sales are now largely focused on subscription-based online services and streaming has skyrocketed. The pandemic and social concerns about sustainability and environmentalism have also triggered a generation of content creators who have very limited interest in touring. *Centres culturels*, who have comprised the core touring network in the Franco-Ontarian community for more than fifty years, are evermore fragile. Interviewees report that the presenter portion of their programming continues to grow smaller and ever-increasingly subsidized by service delivery to other sectors (daycare and family services, immigration, etc.) Stakeholders also confirm that the bulk of French-language performances throughout the province occur in in schools, a market that is dominated by Québec producers selling *clés en main* tours at discount prices due to massive funding available to Québec artists, producers and labels in support of cultural exports. These factors have conspired to significantly reduce contact between Franco-Ontarian music producers and audiences throughout the province.
Challenges • *Technical difficulties:* The number of Franco-Ontarian performing arts venues that are well equipped can be counted on the fingers of one hand. Stakeholders confirmed that touring artists are frequently faced with dated and limited equipment that does not meet their rider requirements. Interviewees also reported that qualified Francophone technicians have never been harder to find, which further compounds the technical challenges of touring in French within Ontario. • *Risk averse presenters*: Stakeholders report that one post-pandemic change within the sector is that presenters have become altogether unwilling to take a chance on unproven talent. As a result, only established artists are touring of late and new artists are struggling to reach audiences. Several stakeholders reported that artists' fees for established talent have risen since the pandemic. • *Limited support systems*: Several stakeholders stated that they felt the ecosystem was lacking support systems (bookers, managers, labels, etc.) for Franco-Ontarian

artists. However, historically, this segment of the Franco-Ontarian music sector has been underdeveloped. Over the past several decades, the market has rarely supported more than one or two Franco-Ontarian agents at a time. Previous generations of Francophone artists in Ontario have sought – and rarely found – support from Québec-based bookers, managers and labels. The number of agents and managers at work in the milieu may represent an all-time high. It may also be less than what would be required to ensure the success of the next generation of Franco-Ontarian creators.

- *Community radio*: There are a half dozen Francophone community radio stations throughout Ontario. A number of interviewees reported that these partners of the Franco-Ontarian music industry are in dire straits. After decades without base funding, add revenues have collapsed over the past several years, leaving community radio in the lurch. Combined with the decrease in local content played by Radio-Canada, accessing the airwaves has rarely been more difficult for Franco-Ontarian artists than it is today.

Opportunities

- *New funding for the industry*: In January 2024, Musicaction announced a new funding program for music industry businesses in Francophone minority communities across Canada. Stakeholders felt the program could provide an important source of base funding for music sector entrepreneurs.

- *Long-distance collaboration*: A number of interviewees reported that recent technological advances and increased comfort with virtual collaboration since the pandemic have created new business opportunities within the Franco-Ontarian music industry. Creators from different parts of the province are collaborate more frequently and more successfully on new production projects. Producers and studios in Ontario are able to record artists throughout the province, the country and abroad. Several stakeholders see this as a business and market development opportunity.

- *Developing niche markets*: Stakeholders felt there were many promising avenues for market development that should be explored over the next few years. Some stakeholders pointed to Francophile networks throughout Canada (ex: Canadian Parents for French, French immersion schools) as untapped resources. Others pointed to touring networks in the United States as prospective targets. Finally, a number of interviewees mentioned expressions of interest from festivals and networks throughout Europe and parts of North Africa. Each of these was seen as an opportunity to export quality products (either live performances or recordings).

- *Leveraging reciprocity*: Several interviewees stated that they felt their relationships with partners in Québec and abroad had reached a stage of maturation. They felt the building blocks for successful collaboration had been established, and that the time was ripe for pilot projects geared not only at exporting products and performances, but at reciprocal exchanges. They mentioned the importance of supporting Franco-Ontarian businesses and artists for extended forays into targeted markets, either through tours or residencies, while also hosting performers and professionals from elsewhere in Canada and around the world in Ontario. They felt this notion of *cultural exchange* would be central to the next phase of market exploration and development.

Film and tv

Overview

Ontario's Francophone film and TV industry is the largest in Canada, outside of Québec. Ontario is also home to the country's only provincial Francophone educational broadcaster (TFO). The sector is an important source of work and remuneration for artists, directors, technicians, administrators, communications and interactive experts, and a gamut of skilled professionals. Exact annual production numbers are difficult to confirm. Two or three French-language feature films have been brought to market since 2010. The sector generates dozens of new shows (stand-alone and series) per year, hundreds of hours of content and tens of millions of dollars in economic impact. Ontario's Francophone media industry reaches hundreds of thousands of viewers throughout Ontario, across Canada and internationally.

Challenges

- *The funding puzzle*: Stakeholders agreed that it is significantly more difficult to fund a production in the Francophone minority context than it would be within Ontario's Anglophone majority or Québec's Francophone majority. Private investors are nowhere to be found. Multinational production partners don't exist. Francophone producers are small, independent, businesses with limited investment capital. Profit margins are slim, particularly when compared with similar businesses operating in a majority context. Budgets are smaller, timelines are tighter, margin for error is smaller. Franco-Ontarian producers and filmmakers are experts of *débrouillardise*. Borrowing from banks to get productions off the ground means paying interest and banking fees that reduce producers' ability to invest in production quality and HR.

- *Limited qualified HR*: There is a talented, skilled, dedicated and limited pool of Francophone talent within Ontario. Screenwriters are scarce. Experienced actors, directors, DOPs, sound and lighting technicians and other professionals are rare. In the entire province, one single media production program is offered in French (at *La Cité*). Graduates learn a range of technical skills, but are learning based on studio news production techniques that no longer meet today's industry standards. Graduates from programs in Québec or in English Canada are hard pressed to adapt to the Franco-Ontarian context once they're already on the job. Certain specialized services simply aren't offered in French, in Ontario (ex: post-production). Faced with a vacuum, producers must decide whether to foot the bill to access services in French in Québec (rendering certain costs ineligible from the perspective of Ontario funders) or to work in English.

- *Reflecting today's francophone population*: Several interviewees conveyed a sincere desire to work to ensure that the faces seen on screen are a true reflection of Ontario's diverse Francophone population. Paradoxically, this sometimes means recruiting actors from other parts of the country when the right actors can't be found within Ontario. Several stakeholders stated that they were committed to better reflecting today's demography on screen and hoped diverse audiences would feel more connected to Franco-Ontarian productions over time.

- *Concentration of power*: Several stakeholders flagged a series of recent mergers and acquisitions in Québec's production and broadcasting industry as a cause for concern. Recent and anticipated takeovers means leadership within the Québec industry is becoming more concentrated. Indeed, the sector is in danger of becoming a quasi-monopoly. Interviewees feared the repercussions this might have for them and the sector, and also cautioned that a similar concentration of power could well play out in English Canada.

Opportunities

- *Training*: Stakeholders had a number of ideas about how to improve access to basic training, in French, in Ontario. Several interviewees mentioned the importance of internships, mentoring and on the job learning to bolster training and develop new skill sets. A number hoped Francophone postsecondary institutions would demonstrate greater openness and be willing to consult and collaborate with industry leaders to develop programs that are aligned with current needs and realities in the sector.

Gaming and Interactive

Overview

This sub sector is fundamentally different from the all others in this report in several ways. There are approximately 300 gaming/interactive studios operating throughout Ontario. Most of them are small, owner operated, businesses, some have hundreds of employees and generated annual revenues in the millions of dollars. Research indicates that roughly 4.3% of all incorporated businesses in Ontario have at least one Francophone owner.[55] This means that of all the studios in Ontario, roughly a dozen are likely owned and operated by at least one Francophone. However, based on our interviews with stakeholders, it seems unlikely that a single one of these studios has an entirely Francophone staff, has French as their language of work, or is developing projects targeting the Francophone market. While there are undoubtedly Francophones working within Ontario's gaming and interactive sector, we would be hard-pressed to report that a Francophone industry exists in Ontario at present.

Challenges

- *A worldwide market*: One of the distinguishing features of the gaming sub-sector is that studios large and small are targeting a truly global market. There are precious few intermediaries – gaming platforms and online stores – standing between the creators and the consumer. Stakeholders confirmed that once the games have been created, they are often translated – to varying degrees and in different ways – to reach gamers around the world and allow them to experience the game in one of a number of languages.

- *Managing growth*: The majority of stakeholders with this subsector are small, owner-operated businesses. A number of them throughout the province are

[55] Assemblée de la francophonie de l'Ontario, Fédération des gens d'affaires francophones de l'Ontario, The Franco-Ontarian Economy: White Paper, June 2022, page 6.

poised for growth and struggling to manage expansion. Interviewees felt that access to bridge funding and to expertise would be helpful and could foster long-term development within the sector.
Opportunities • *Publishing and promotion*: Interviewees noted the absence of specialized publishing and promotion experts within Ontario. They felt it could be beneficial for the province to invest in the development of these services and support systems in order to better promote Ontario's gaming sector both at home and abroad.

Comparative analysis

Québec

Ontario's francophone creators, producers, presenters, and publishers are forever comparing themselves to their counterparts in Québec. The range and robustness of policies, agencies and programs supporting Québec's creative industries is impressive, as is the scale of the investments.

Distinctive policies, programs and practices

Status of the artist: Québec has had status of the artist legislation since 1987.[56] The act is substantial and wide ranging. It confers the right to collective bargaining, outlines the process for trade unions to be recognized, includes protective measures (psychological harassment, etc.), sets out terms of corporate liability within the sector, etc.

Politique du livre: Québec has long-standing legislation in support of the book industry.[57] The *Act*'s main feature is a provision whereby any purchase of books on behalf of a government institution (including schools) must be made from a designated local bookseller. This ensures that a network of bookstores can rely on sales to local institutions.

Cultural mediation: Though it is not rooted in legislation, the concept of cultural mediation is widely understood throughout Québec. The practice, aimed at deepening the public's experience and understanding of art, involves engaging audiences in activities that are complimentary to artistic work or cultural product. For example, a cultural mediator may facilitate a discussion between a book's author and a local book club.

Municipal cultural policies: Throughout Québec, 186 municipalities in 18 regions of the province have adopted and implemented their own cultural policy. The government of Québec has provided a framework for these policies and incentives for their development and implementation.

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[56] S-32.1, *Act respecting the professional status of artists in the visual arts, film, the recording arts, literature, arts and crafts and the performing arts, 1987.*
[57] D-8.1, *Act respecting the development of Québec firms in the book industry, 1979.*

Data on creative industries: One of the most striking points of contrast between the Franco-Ontarian creative industries we have examined and those in Québec is readily accessible cultural data. Québec's *Observatoire de la culture et des communications du Québec*, a branch of the *Institut de la statistique du Québec*, is a tremendous source of data on Québec's creative industries. The *Observatoire* tracks and publishes statistics on: workers and jobs in culture; sales of books and music recordings; attendance at shows, museums and movie theatres; provincial and municipal spending on culture; public libraries, etc. It also provides research on cultural economics, market analysis, etc.[58]

*Société de développement des entreprises culturelle (*SODEC) is the primary source of provincial support for Québec's creative industries. The agency provides grants and tax credits for audiovisual production, the publishing industry, music and performing arts, craft, digital and architectural sectors. SODEC supports most aspects of creative industries, including production, distribution, industry events, market development, etc. SODEC also operates a lending program for businesses within the creative industries, providing direct loans at preferred interest rates, guaranteeing loans from other lenders or venture capital for business growth. For 2023, SODEC's total expenses were $227,751,663[59], more than five times the total expenses by Ontario Creates for 2022-2023.[60]

The *Conseil des arts et des lettres du Québec* (CALQ) is the second major, multi-sector, public funder for culture in Québec. CALQ's overall expenses for 2022-2023 totaled 138.4 million (granting expenses totaled 128.5 million.[61]) While it does not directly support cultural businesses, it does provide a range of funding programs in support of independent film development and production, writing and publishing, audio recording, touring and presenting. By way of comparison, the Ontario Arts Council's expenses for 2022-2023 totaled $66.4 million.[62]

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[58] https://statistique.quebec.ca/en/institut/our-organization/observatoire-de-la-culture-et-des-communications-du-quebec#cb_mission-occcq
[59] SODEC, Rapport annuel de gestion 2022-2023, Gouvernement du Québec, page 13.
[60] Ontario Creates, Annual Report : 2022-2023, Government of Ontario, page 69.
[61] Gouvernement du Québec, Rapport annuel 2022-2023 : Investir dans l'imaginaire, Conseil des arts et des lettres du Québec, Direction des communications et de la promotion des arts et des lettres, 2023, page 77.
[62] Ontario Arts Council, Annual report, 2022-2023, page 31.

Musicaction is an important source of funding for Québec's music industry. *Musication* is the French-language counterpart of the Foundation Assisting Canadian Talent on Recordings (FACTOR). *Musicaction* is a not-for-profit foundation that distributes funding it receives from private radio broadcasters and from the Department of Canadian Heritage. While it is not, strictly speaking, a provincial funder, *Musicaction* is based in Montreal and the overwhelming majority of its expenses (91% in 2022-2023)[63] are for initiatives by Québécois artists, organizations and businesses.

Cultural diplomacy: One of the most significant differences between support for creative industries in Québec and anywhere else in Canada is the extent to which culture is integral to the province's export and diplomacy strategy.

The *Secrétariat du Québec aux relations canadiennes (SQRC)* is a unit of the provincial government dedicated to fostering collaboration between Québec and Francophone communities throughout the rest of Canada. They operate a granting program that funds Francophone minority organizations for projects they undertake in partner with Québec-based organizations. The secretariat operates offices in Ottawa, Toronto and the Maritimes. It's total expenses for 2021-2022 (including operations costs and grants) was $15.2 million.

Over the past fifty years, Québec has established a strong diplomatic presence abroad. It has permanent delegations in nine countries and a network of *Bureaux du Québec* who support trade, market development international collaboration and a strong cultural presence (touring, residencies, etc.) in fifteen different countries.[64] In 2021-2022, Québec's Ministère des Relations internationales et de la francophonie spent just over $56 million on representing Québec abroad.[65]

Québec is a currently a signatory of sixty-seven international agreements on culture[66] and a full member of *l'Organisation internationale de la Francophonie (OIF).*

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[63] Musicaction, Rapport annuel 2022-2023, page 47.

[64] https://www.quebec.ca/gouvernement/ministere/relations-internationales/representations-etranger

[65] Gouvernement du Québec, Ministère des relations internationales et de la francophonie, Rapport annuel de gestion 2021-2022, page 41.

[66] https://mrif.gouv.qc.ca/fr/ententes-et-engagements/recherche?typeEntente=&territoireId=&secteurId=6&codeStatut=292&anneeEntreeVigueurDebut=1964&anneeEntreeVigueurFin=2024&Numero=&PageSize=25#results

New-Brunswick

The only officially bilingual province in Canada, New-Brunswick is home to the country's second largest Francophone minority community (more than 229,330 people in the province speak French)[67]. A number of well-established Francophone not-for-profits are at work within the cultural sector, including a multi-disciplinary service organization for individual artists – *Association Acadienne des artistes professionnels du Nouveau-Brunswick (AAAPNB),* a network of Francophone presenters throughout the Maritime provinces – *Réseau Atlantique de Diffusion des Arts de la Scène (RADARTS)*, three French-language book publishers, one on-line cultural magazine and ten Francophone radio stations. A number of Francophone businesses are also thriving within the province's cultural sector, most notably, five audiovisual production companies.

Distinctive policies, programs and practices

Individual artists are supported by the New Brunswick Arts Board (ArtsNB), the provincial arts council. ArtsNB's total budget for 2022-2023 was $1,753,630 with granting expenses totaling $1,203,449[68]. Organizations receive funding from the Arts and Culture program, administered directly by the Ministry of Tourism, Heritage and Culture. In 2022-2023, Arts and Culture program expenditures totaled $13 739 200[69].

Cultural diplomacy: One of the most distinctive elements of New-Brunswick's structure in support of culture and creative industries is the *Stratégie de promotion des artistes acadiens sur la scène internationale (SPAASI)*, a long-standing intergovernmental program providing support for market development and exporting of culture and cultural products. *SPAASI* is jointly funded by the governments of New-Brunswick and Nova-Scotia and receives roughly 50% of its funding from the Government of Canada's Atlantic Canada Opportunities Agency. It also manages funding from other sources, including LearnSphere and Musicaction. In 2017-2018, the last year for which a detailed expense report is available, SPAASI's expenses totaled $213,176.[70]

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[67] https://rvf.ca/en/francophone-discoveries/communities/new-brunswick/

[68] ArtsNB, The New Brunswick Arts Board*, Annual Report, 2022-2023*, page 46.

[69] Gouvernement du Nouveau-Brunswick, *Tourisme, Patrimoine et Culture, Rapport annuel 2022-2023*, page 23.

[70] Stratégie de promotion des artistes acadiens sur la scène internationale, Rapport annuel 2017-2018, page 50.

Status of the artist: New Brunswick recently completed a seven-year-long research and consultation process and is currently working to develop Status of the artist legislation.

Future areas for consideration

During the preparation of this report, a number of items – beyond the scope of the study - were flagged that would merit additional attention or follow-ups in the future. In particular:

Further market research

The lack of basic market research on the French-language culture in Ontario was raised repeatedly, by a range of stakeholders working across all subsectors. We recommend:

- Conducting a complete market analysis for French-language cultural products in Ontario. This work should examine a range of factors affecting the market for Francophone cultural products including age of the Francophone population, household buying power, trends regarding cultural spending and attendance, etc.

- Tracking and reporting activity, production levels and market trends across the Francophone cultural sector (The number of Francophone artists presented, attendance at performances, number of performances, artist's fees, recordings launched and streamed, books launched and sold, films and TV productions, etc.

Given the importance of French-language education for the development of Ontario's Francophone population, the lack of available data on cultural activity in Francophone schools is surprising. We recommend:

- Conducting a report on arts presenting activity in French-language and immersion schools throughout Ontario and an inventory of available presenting infrastructure (stages, PA and lighting equipment, etc.) in French-language and immersion schools throughout the province. This work is currently beyond the means of community-based organizations to conduct and would help complete the analysis of touring infrastructure in Francophone communities throughout Ontario that has previously been done by Réseau Ontario.

Branding

- Support collective marketing efforts (campaigns, tools, etc.) emanating from the field and support a branding and marketing campaign that would draw increased attention to a wide range of Franco-Ontarian cultural products.

Capitalizing on export opportunities

- Align market development support across the whole of government by prioritizing initiatives targeting certain regions of strategic importance (notably: Ontario, Québec, the United-States and *Francophonie internationale)* given their importance as complimentary markets for Francophone businesses and organizations in Ontario.

- Partner with the Government of Canada to develop and support a long-term initiative aimed at market development initiatives for Ontario’s Francophone creative industries targeting Québec and *Francophonie internationale*, inspired by the SPAASI model.

Appendix 1: Stakeholder Interview Questionnaire

Section A : Organismes de service aux arts

- Pouvez-vous me décrire votre mission/mandat et comment vous le mettez en oeuvre?

  - Quel est votre budget annuel?
  - Recevez-vous actuellement un financement de la part du gouvernement de l'Ontario?
    - Si oui, combien et de quel(s) bailleur(s) de fonds?
    - Ce montant représente environ quel pourcentage de votre budget annuel?
  - À quoi ressemble votre main d'œuvre, aujourd'hui et depuis quelques années?
    - (ETP, employés v. contractuels, âge, diversité culturelle, genres, expérience, rétention en poste.)
    - Tendance : stable, à la hausse, à la baisse?
  - Que sont vos plus grands/plus beaux bons coups des années récentes? (Jusqu'à 3).

- Pouvez-vous me décrire votre membership en Ontario? Est-ce que ce sont des individus, des organismes, des entreprises, etc.?

  - Combien de membres avez-vous en Ontario?
    - Est-ce que le nombre de membres est stable, à la hausse ou à la baisse depuis quelques années?
  - Où sont-ils et elles situés en province?
    - Est-ce que certains endroits ont une plus grande densité de membres que d'autres? Pourquoi?
    - Est-ce que vous remarquez des changements ou des tendances sur ce point?
  - Avez-vous remarqué des changements ou des tendances depuis 5 ans sur le plan du profil des membres (âge, genres, diversité culturelle, des régions où les membres sont actifs, etc.?)
  - Combien et à quel point vos membres réussissent-ils à accéder à des fonds publics en appui à leur travail/activités?

- À quoi ressemble le volume d'activité (de production) de vos membres de l'Ontario? (Nombre d'albums, de livres publiés, de films produits et en développement, etc.)

  - Avez-vous remarqué des changements ou des tendances sur le plan du volume d'activité (de production) ou de la nature des activités de vos membres depuis les cinq dernières années?

    - Avez-vous remarqué des tendances depuis quelques années sur le plan des budgets dont disposent vos membres pour faire leur travail?
    - Est-ce que la nature du travail qu'effectuent vos membres a changé depuis quelques années? (P.ex. : Comment le virage numérique affecte votre travail/le travail de vos membres?)

- Que sont les principaux défis qui affectent votre secteur, à présent et depuis quelques années?

    - Remarquez-vous des enjeux auxquels vos membres en Ontario se heurtent particulièrement? (P.ex.: manque de financement, pénurie de main-d'œuvre, difficulté d'accéder à des ressources techniques spécialisés, manque de promotion, etc.)
    - Est-ce que vos membres ont accès à toutes les ressources et appuis nécessaires pour réussir leurs projets? (Pas seulement financières : distribution, promotion, médias, rayonnement, technique, développement des affaires, etc.)

- Que sont les principales opportunités sur lesquels vos membres cherchent à capitaliser depuis quelques années?

    - Est-ce que certains de vos membres ont des histoires à succès particulières dont nous devrions tenir compte? (Production, rayonnement, distribution, diffusion, développement des affaires, etc.)
    - Est-ce que vous remarquez certaines opportunités sur lesquels vous/vos membres ne réussissez pas tout à fait à capitaliser? Si oui, lesquels et pourquoi? Qu'est-ce qui manque?

- Comment imaginez-vous le secteur/votre membership/les industries culturelles francophones en Ontario, d'ici 5 ans?

    - Que sont les enjeux majeurs qui affecteront le secteur d'ici 5 ans?
    - Comment ces enjeux affecteront-ils votre organisme/votre membership?
    - Comment votre organisme/vos membres pourrai(en)t-il(s) agir afin de pallier les défis et saisir les opportunités que vous évoquez?
    - Quels rôles imaginez-vous pour votre organisme afin de faire en sorte que cette vision d'avenir se concrétise/pour éviter le pire (selon le cas)?

- Comment votre membership en Ontario et leur travail se compare-t-il à d'autres groupes dans d'autres juridictions (P.ex. : Ontario anglophone, Québec, Acadie, international)?

    - Qu'est-ce qui fait en sorte que ces groupes, ailleurs, se portent mieux/moins bien que votre membership?
    - Y-a-t-il des rapports de recherche/études récentes qui portent sur votre secteur/vos membres et sur lesquels nous devrions nous pencher?

- Connaissez-vous/Participez-vous à des initiatives qui font en sorte que les intervenants de ces différentes juridictions collaborent entre eux?

- À quel point vous/vos membres avez-vous accès à différents marchés? (Notamment : celui de l'Ontario français, de la majorité, du Québec, ailleurs au Canada et à l'international?

  - Est-ce que vous/vos membres, participent actuellement à des vitrines, missions ou marchés visant l'Ontario anglophone, le Québec, d'autres régions du Canada, et l'international.
  - Qu'est-ce qui pourrait vous aider/aider vos membres à mieux développer le marché de l'Ontario (français et anglais), des marchés avoisinants et internationaux?

- Avez-vous des partenaires importants/inusités qui vous aident à mieux réussir votre travail ou à le pousser plus loin?

  - Comment développez-vous des collaborations avec ces partenaires?
  - Que rapportent ces collaborations?
  - Quelle est la valeur (en argent) de ces collaborations?

- Quelle sorte d'appui le gouvernement de l'Ontario pourrait-il vous offrir pour vous aider à optimiser vos efforts en appui au développement de vos membres et du secteur?

  - En quoi est-ce que cet appui vous serait bénéfique/serait-elle bénéfique pour vos membres?

Section B : Artistes et entrepreneurs individuels

- Parlez-moi de votre travail. Que faites-vous au jour le jour?

  - Historique et développement :
    - Depuis quand faites-vous ce genre de travail?
    - Avez-vous suivi une formation avant de lancer dans ce travail? Laquelle?
    - Est-ce que vous avez suivi des formations ou participé à des occasions de développement professionnel depuis que vous avez débuté ce travail?
    - Est-ce que votre pratique/entreprise a changé/évolué au fil des ans?
  - Volume :
    - Combien de projets/livres/films/émissions/enregistrements sonores produisez-vous/effectuez-vous par an?
    - Est-ce que nombre est stable/en expansion/à la baisse depuis 5 ans?
    - Pourquoi?
  - Budget :
    - Combien de revenus (approx.) générez-vous par an?

    - Est-ce que vous recevez des fonds publics en appui à votre travail? Si oui, combien par an et de quelle(s) source(s)?
    - Combien investissez-vous dans votre pratique/entreprise par an?

- Êtes-vous membre d'un regroupement/d'une association/d'un organisme qui vous appuie dans votre travail? Si oui, le(s)quel(s). (Distinguer entre les organismes de l'Ontario, pancanadiens, du Québec, etc.)

    - En quoi votre adhésion à ces différents groupes vous est-elle utile? (Quels bénéfices recevez-vous en raison de votre adhésion?)
    - Êtes-vous membre d'une chambre de commerce ou autre regroupement d'entrepreneurs? Qu'est-ce que ça vous rapporte?

- Avec quelle clientèle/types de créateurs travaillez-vous, de prime abord? (Vous-même ou d'autres?) Si d'autres :

    - Comment repérerez-vous la clientèle/les créateurs avec lesquels vous travaillez?
    - Est-ce que votre clientèle est surtout locale, provinciale, de partout au Canada, de l'étranger?
    - Est-ce qu'il s'agit d'une clientèle/de créateurs émergents, établis, chevronnés?
    - Quel pourcentage de votre clientèle/des créateurs avec lesquels vous travaillez reçoivent des fonds publics pour leurs projets? À quelle étape (création, production, promotion, etc.)?
- Que sont les principaux défis qui affectent votre travail, à présent et depuis quelques années?

    - Qu'est-ce que vous aiderait à mieux pallier ces défis?
    - Est-ce que d'autres de vos collègues ou compétiteurs se heurtent à des défis semblables?
    - Est-ce que vous avez accès à toutes les ressources et appuis nécessaires pour réussir vos projets? (Pas juste financières : distribution, promotion, médias, rayonnement, etc.)

- Que sont les principales opportunités sur lesquels vous chercher à capitaliser actuellement et depuis quelques années?

    - Que sont vos plus belles/plus grandes histoires à succès récentes? (Production, rayonnement, distribution, diffusion, développement d'affaires, etc.)
    - Est-ce que vous remarquez certaines opportunités sur lesquels vous ne réussissez pas tout à fait à capitaliser? Si oui, lesquels et pourquoi? Qu'est-ce qui vous aiderait à capitaliser davantage?

- Comment imaginez-vous votre travail/votre clientèle/le secteur d'ici 5 ans?

- Que sont les enjeux majeurs qui vous affecteront/affecteront vos clients et le secteur d'ici 5 ans et comment vous affecteront-ils?

Section D : Bailleurs de fonds, agences et institutions gouvernementales

- Comment appuyez-vous les industries culturelles francophones en Ontario?

  - Programmes :
    - Quels programmes appuient ces secteurs d'activités?
    - Que sont les budgets des programmes et qu'investissez-vous d'une année à l'autre?
  - Partenariats :
    - Outre le financement, portez-vous ou participez-vous à des initiatives de concert avec d'autres instances (de l'Ontario ou ailleurs) en appui aux industries culturelles francophones en Ontario?

- Comment imaginez-vous le secteur/chacune de ces industries/le milieu artistique et culturel francophone de l'Ontario, d'ici 5 ans?

  - Quels rôles imaginez-vous pour votre organisme afin de faire en sorte que cette vision d'avenir se concrétise/pour éviter le pire (selon le cas)?
  - Que sont les enjeux majeurs qui affecteront le secteur d'ici 5 ans?
  - Comment ces enjeux affecteront-ils votre organisme?
  - Comment votre organisme/les intervenants que vous appuyez pourrai(en)t-il(s) agir afin de pallier les défis et saisir les opportunités que vous évoquez?

- Que sont les principaux défis qui affectent les industries culturelles francophones, à présent et depuis quelques années?

  - Remarquez-vous des enjeux auxquels les intervenants se heurtent particulièrement? (p.ex.: manque de financement, pénurie de main-d'œuvre, difficulté d'accéder à des ressources techniques spécialisés, manque de promotion, etc.)
  - Est-ce que les intervenants ont accès à toutes les ressources et appuis nécessaires pour réussir leurs démarches? (P.ex. : distribution, promotion, médias, rayonnement, expertises techniques, technologies, développement d'affaires, etc.)

- Que sont les principales opportunités sur lesquels les intervenants des industries culturelles cherchent à capitaliser actuellement et depuis quelques années?

  - Est-ce que certains intervenants ont des histoires à succès particulières dont nous devrions tenir compte? (Production, rayonnement, distribution, diffusion, etc.)

- Est-ce que vous remarquez certaines opportunités sur lesquels les intervenants ne réussissent pas tout à fait à capitaliser? Si oui, lesquels et pourquoi? Qu'est-ce qui manque?

Appendix 2: List of Stakeholders Interviewed

Contact	Organization
Lisa Breton	Alliance culturelle de l'Ontario
Thomas Kriner	Association des professionnels de la chanson et de la musique
Bruno Boëz	Front des réalisateurs indépendants du Canada
Piedad Saenz	Regroupement des éditeurs francophones du Canada
Stéphane Cormier	Éditions Prise de parole
Michel Bénac	LaFab musique
Nathalie Bernardin	Amixie Solutions
Jocelyn Forgues	
Marie-Pierre Gariepy	Slalom Productions
Michelle Séguin	TFO
Sonia Boisvert	TFO
Mélanie Brulée	OttawaMic
Marie Ève Chassé	Réseau Ontario
Stéphane Gauthier	Le Carrefour Francophone de Sudbury
Patrick Bourbonnais	49e Parallèle
Suzanne Kemenang	Éditions Terre d'accueil
Yves Turbide	Association des auteurs de l'Ontario français
Jean-Sylvain Sormany	Snowed-In Studios
Shawn Sasyniuk	Crosspatch Studios
Nicole Baptiste	Mozaïque interculturelle
Carol Ann Pilon	Association des producteurs francophones du Canada
Angèle Bassolé-Ouédraogo	Éditions Malaïka