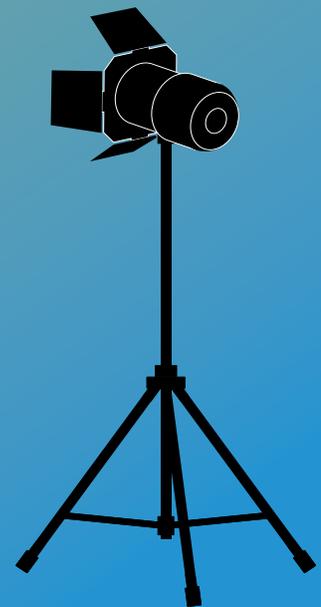
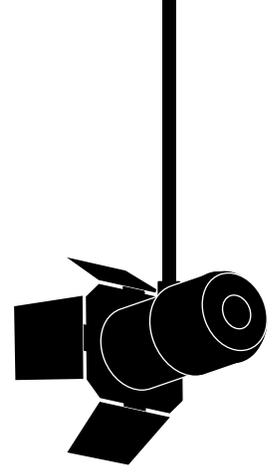


Focus Features

The Future of Filmmaking in Ontario

Prepared by
Directors Guild of Canada,
Producers Roundtable of Ontario,
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Table of Contents

Foreword	4
Executive Summary	8
Introduction	13
Methodology	15
Ontario Feature Film Landscape	17
Historical Context for the Ontario Feature Film Sector	21
Issue Topics	24
What is a Feature Film?	25
Screenwriter, Director and Producer roles	27
Career Path and Professional Development	29
Training	29
Mentorship	31
Talent Pool	32
Turnover of Decision Makers	33
Career Sustainability	34
Diversity	35
Development and Production	38
Development	38
Production Financing	39
Production Challenges	43
Marketing and Reaching Audiences	45
Promotion	45
Distribution	47
Archival	49
Case Studies of Three Ontario Feature Films	50
<i>Jean of the Joneses</i>	51
<i>Maudie</i>	52
<i>Mean Dreams</i>	54
Suggested Next Steps and Conclusion	56
Suggested Next Steps	57
Suggestions for the Future and Opportunities for Further Study	57
Conclusion	58
Appendix A – Steering Committee and Researchers	59
Appendix B – Interview Participants	63
Appendix C – Further Data	71
Appendix D – Feature Film Funding in Other Jurisdictions	79
Quebec	80
Manitoba	81
Ireland	83
Sweden	84
Australia	85
Appendix E – Bibliography and Additional Reading	88

Foreword

*From the Focus on Features Steering Committee (DGC, PRO, WGC)
November 2018*

As we write this foreword, many relevant changes and initiatives are afoot:

- Ontario's new Progressive Conservative government has been in power for only a few months and has not yet presented its first provincial budget;
- the CRTC recently delivered a report about the future of programming distribution in Canada and the extent to which the future environment will support a vibrant domestic market that will remain competitive in the new global environment;
- Innovation, Science and Economic Development Canada and Canadian Heritage recently launched a review of the Telecommunications and Broadcasting Acts, with recommendations expected January 31 2020;
- the Canadian film industry is lobbying the federal government to implement a long-term funding strategy for Canadian feature films including an increase to Telefilm Canada's budget;
- the next federal election will take place October 21 2019; and
- we have new heads of Telefilm Canada and the CBC.

Some, if not all, of these initiatives will impact on the world of domestic, culturally Canadian, feature film.

Why did we want to do this study?

PRO and the DGC embarked on this project more than two years ago out of an urgent sense that domestic feature film production in Ontario is being badly eroded; that its significance is being lost in the disruptive tsunami of digital technology and non-theatrical screen formats for audio-visual storytelling (like binge-able serials presented on popular OTT services).

Further, with constant, if not increased efforts by governments and the public, to more readily recognize, support and encourage foreign service production (productions shot and sometimes posted in Canada but not originated in Canada or having copyright owned by Canadians) we find that feature film talent development, and sustainability in English Canada, are suffering from benign neglect in the province.

We find our writers and directors constantly called upon to lead the creative teams of the most sophisticated and critically acclaimed Canadian and US television programs in the world, but they are unable to sustain careers making feature films at home. Feature film producers are similarly diversifying or moving completely over to TV production feeling the feature film platform has been abandoned. We were concerned that these migrations might be the result of a long-standing paucity of core financial support for domestic feature film. Producers working on feature films must seek financing and market support internationally which often has the effect of diluting identifiably Canadian content. Because our writers and directors have not been making feature films, they are often not considered for international co-productions in favour of writers and directors from jurisdictions that have been more consistently supported and developed by their home jurisdiction.

In the face of these realities, PRO and the DGC, together with the Writers Guild of Canada (WGC), felt it was time to reflect back to the industry the faces and voices of Ontario producers, directors and writers of feature films. To educate or remind us all of who we are, how we came to be here and what the challenges and opportunities are for home-grown storytellers who choose feature film as their medium of expression.

Where does Feature Film stand today?

Feature filmmaking persists despite technological and economic disruptions. Feature films transcend borders; they are universal. Film festivals around the world remain vibrant and successful and film fans and buyers everywhere come out in great numbers to be moved, entertained and provoked by feature films. And if anything, today, feature films can be watched and enjoyed in cinemas and on many more platforms than ever. In the words of US filmmaker Ava DuVernay who recently served as a juror for the Cannes Film Festival: "It's important to be inclusive about the ways we experience a film, whether it is in a theater or not. It's still a film. A film is a story told by a filmmaker. The way the film is presented to an audience has no bearing on whether or not it's a film."

Despite falling attendance at cinemas, and the exhibitors' pre-occupation with comic book blockbuster sequels, there are more feature films being produced today than ever before. This is not simply a function of 20th century fans persisting, but more importantly of 21st century millennials picking up the new "democratized" technology to create feature films that reflect the vitality of a new generation. In Ontario, young people are attending film schools in increasing numbers – one of the signs of a flourishing art form and its economic potential.

Indie Film

The independent industry is, by and large, a form of cultural expression that operates within a commercial environment and that reflects individual national cultures around the world. For national policy reasons, many governments have stepped forward with support for independent filmmaking to stimulate local and universal storytelling for domestic and worldwide audiences through this popular medium of feature film. In parallel, there is a vast international sales network that is dedicated to the buying, selling and distribution of independent feature films that complements the equally vast array of film festivals (and accompanying media and publicity network) that screen and promote “indie” films and talent around the year and around the world.

Ontario

Ontario supports feature film directly and indirectly in many ways through: programs in its schools, colleges and universities, film festivals large and small in every region, professional training programs and institutions, artist-run equipment and facility centres and more; and through tax credits and OMDC’s* Film Fund and Export programs. But Ontario does not have a comprehensive feature film policy and its most critical fundamental resource - investment in development and production of feature films - has stagnated significantly over the last 12 years (and was non-existent for the 10 years prior).

This study (Appendix D) includes a comparison of such support in other jurisdictions but we would like to highlight Quebec where strong and sustained provincial support for feature film development and production has resulted in national and international success and recognition of feature film writers, directors and producers. Quebec filmmakers consistently dominate the Toronto International Film Festival’s Top Ten and the Canadian Screen Awards. As much as we admire the strength of Quebec filmmaking, it strikes us as counter-intuitive that films from the rest of Canada have not fared better. We are deeply concerned that the issue may be systemic.

About English Canada (and Ontario):

When it comes to domestic feature films, English Canada is unique in the world. We speak the same language in pretty much the same way as Americans. It is difficult, on the surface, to differentiate us from Americans. Being a key part of North America, and the only part (unlike Mexico and French Canada) that so closely resembles Americans, we are often subsumed within that behemoth; a massive market that happens to include Hollywood. Indeed, English Canada is often considered to be part of the US when it comes to measuring box-office and the acquisition of rights. Most other countries around the world have a much easier time expressing their culture through film because of their language or accent. Yet, we are different from Americans in many ways, including as filmmakers. We have a unique opportunity to tell our stories to ourselves and the rest of the world through the internationally recognized, proven and welcomed medium of feature film. As a mature and sovereign entity, we need to be able to express our uniqueness, our cultures, our stories. After all, if we do not do it who will?

* Please note that in September 2018, the OMDC changed its name to Ontario Creates. For the purpose of the study, which was conducted prior to this change, the name used has remained as the Ontario Media Development Corporation or the OMDC.

Constraints of the study:

Time and money limitations did not allow for follow-up interviews with interviewees to challenge them with the overall findings and give them an opportunity to reflect and respond to the study's findings. It would be valuable in future to do this.

Again, due to time and money limitations, the report provides only an overview of the current state of theatrical exhibition and distribution, and the lack of support from broadcasters to license and air Canadian feature films. The main funding bodies federally and provincially continue to consider traditional distributors as the marketplace triggers for the majority of their funding, despite its limited practicality. There are very few eligible distributors and they are generally extremely risk averse. They earn the majority of their income by distributing pre-packaged films from other countries. Without international marketplace acceptance or Hollywood marketing budgets it is impractical for distributors to trigger very many Canadian films especially without the backstop of a broadcast license, of which there are very few. This is important context for understanding where and how new platforms and technology fit in.

You will see in the report, case studies of 3 Ontario films. These are interesting and informative but do not tell the full story. The original intention of this part of the study was to look at how Ontario films and filmmakers were perceived by the public. We believe this would be a valuable piece of research but were not able to do it this time around. Do we have a PR problem? Is this an opportunity for a marketing / PR strategy of some kind? We think this is a fertile field for investigation.

In Conclusion

PRO and the DGC felt it imperative to participate in a report that seeks to find its place in the new order. We also felt it critically important to paint a picture and create awareness, of the Ontario feature film industry as it is today through the voices of the triad of practitioners that drive it – the writers, directors and producers. Together with the WGC, PRO and the DGC adopted the methodology of speaking directly to these practitioners about where the Ontario industry has come from, where it is today and where it might go in the future. We hope you find the report valuable, informative and useful in setting a course for the future.

Executive Summary

It is hoped that the voices in this report, and the data that provides context for their perspectives, will provide the reader with a better insight and awareness of the challenges, opportunities and potential strategies to support and improve the Ontario feature film sector. A simple solution would be to increase funding for the development and production of feature film in Ontario as that would provide screenwriters, directors and producers with more opportunities to allow them to enhance their skills, time and money to craft the best possible scripts, and the budget to produce commercially competitive feature films. However, as this report demonstrates, there are other strategies which would work hand in hand with additional funding such as training in new technologies, targeted training to expand the talent pool, formal networking to help emerging talent develop their careers and to assist established talent in sustaining their careers.

The Ontario feature film sector produces audience-pleasing and award-winning feature films but with more support could develop a sustainable industry and a marketable brand that film audiences around the world will recognize because of the quality and creativity of an Ontario feature film.

Under the plan developed by the parties to the study, staff of Ryerson University conducted one-on-one interviews with Ontario feature film producers, directors and screenwriters as well as with industry stakeholders. In order to broaden the scope of experiences and opinions, they did a survey of additional Ontario feature film producers, directors and screenwriters. Ryerson also conducted a literature review of existing, relevant third party research. The objective was to delineate the current Ontario feature film landscape, its challenges and opportunities.

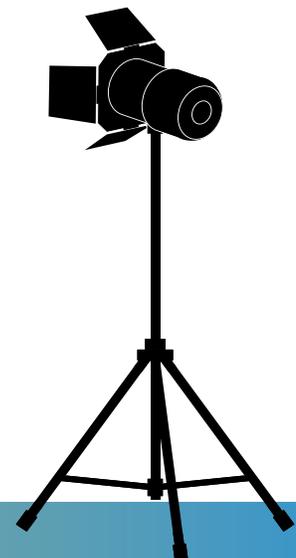
To set the stage:

- The Ontario feature film industry is made up of two very different branches: foreign (location service) production, and domestic production, both of which are supported by provincial and federal governments. Both are important to the health of the Ontario feature film sector as they provide jobs and career opportunities. But only domestic production supports Ontario creators telling Ontario stories.
- Canadian feature films have only a fraction of the theatrical market (1.8% in 2016) due to having much lower budgets and less promotion than most Hollywood movies. Audience behaviour is changing however, and there are growing opportunities to watch Ontario feature films on broadcast and through digital distribution channels and platforms.

Highlights of the findings include:

- As a **theatrical release** becomes increasingly less important to a feature film's success in finding an audience, **the definition of feature film is evolving**. There was no consensus on what a new definition should be, but interviewees suggested that the focus should be more on the form of storytelling and less on how it entered the marketplace. There was also concern expressed that funding guidelines were not keeping up with this evolution, leading to a potential disconnect between the funders and the market that they exist to support. For example, funders should consider that a feature film still qualify as a feature film even without a theatrical release.
- Two or three of the core and **distinct roles of screenwriter, director and producer** are often performed by the same person or persons due to the scope of the film, available funding, development history of the project or a desire to have increased control over a property. Creators frequently fulfill different roles depending on the property and its circumstances.
- While there are many post-secondary institutions that teach filmmaking, creators placed a lot of importance on less formal methods of instruction including workshops, **on the job training and mentoring**. Many creators followed other career paths before transitioning to feature filmmaking and mentorship was key in helping them to develop their career.
- **Sustaining a career in feature film is hard** given how few films are made in Ontario each year. Many filmmakers balance work in television with film to both pay the bills and develop their craft. More funding to feature film was seen as a way to ensure that filmmakers were able to devote more of their time to their chosen craft.
- Filmmakers were very concerned that there is **insufficient diversity** within the sector. While there are a number of programs that target gender balance and indigenous representation, many participants were concerned that creators need to be more generally representative of their audience and tell a wide variety of stories both because access to production for all communities should be a civic duty but also a business imperative.
- There was a perception that feature film funding primarily supports a small pool of experienced filmmakers. This perception was not supported by Telefilm Canada funding statistics. It may be that as there are specific programs for early career filmmakers the funding gap is with mid-career filmmakers but those demographics are not tracked. Another possible contributor to the misperception is the feeling that the same pool of filmmakers is being funded because the decision makers have not changed for some time. A **mandated turnover of decision makers** was suggested as a way to diversify funded feature films.
- A major challenge in Ontario feature film is **insufficient development funding** as development is a key factor in ensuring that the best possible script, and therefore more successful film, is produced. All sources of development financing (i.e., Telefilm, OMDC, The Harold Greenberg Fund) are heavily oversubscribed.

- **Production funding is also heavily oversubscribed.** Filmmakers look to many other sources of financing such as international and interprovincial co-production, private investment and deferral of fees to be able to complete financing. Participants suggested exploring other funding models, such as corporate or slate funding, to build sustainable companies rather than fund on a per project basis.
- The **success and size of the foreign location sector and the domestic television sector** present challenges to Ontario feature film production as they can drive up prices and restrict availability of talent and infrastructure such as studios and equipment. They can also create opportunities though for career development.
- Several participants noted that **technological changes**, such as the ability to film and edit using smartphones and laptops, have lowered barriers to entry as well as contributed to the evolution of the definition of feature film. Participants felt it was too early to see the impact of these technological changes on filmmaking as a whole.
- **Discoverability** is a key challenge in a crowded content marketplace, particularly given how little Ontario filmmakers have available to spend on promotion. There are several government and grassroots programs working to raise the awareness for Ontario and Canadian feature films but they are often fighting against outdated attitudes and biases.
- There are programs aimed at increasing Canadian feature films in theatres while still acknowledging that increasingly Canadians are viewing films on television and through **digital distribution** channels. New skills are required by filmmakers to better take advantage of digital distribution. Further study can explore how digital distribution channels can support Ontario feature film.
- **Case studies** of three Ontario feature films, *Jean of the Joneses*, *Maudie* and *Mean Dreams*, illustrate how Ontario feature films are rarely promoted as such and do not appear to have a distinct brand. The case studies also demonstrated different opportunities for financing, production, promotion and distribution based on the distinct characteristics of a film.
- A **review of Feature Film funding** in similar jurisdictions in Canada and around the world identifies both similarities in funding mechanisms but also different mechanisms that could be explored in Ontario.
- The report concluded with suggested next steps that the industry could implement followed by possible topics for further study:



Next Steps

- Focused professional development by the feature film industry
- Formal and informal mentorship networks for screenwriters, directors, and producers
- Push for representation on screen and behind the camera of Ontario's multicultural and diverse population
- Training and guidance on new methods of distribution and self-distribution
- Create on-going opportunities to continue the dialogue with screenwriters, directors and producers to monitor developments in the industry

Opportunities for Further Study

- Investigate how SVOD providers could promote Ontario feature films on their services, increase the number of Ontario feature films in their catalogues and provide cultural policy makers with data
- Conduct a more thorough review of funding in other jurisdictions as set out in Appendix "D"
- Explore how the industry could demonstrate benefits of a mandated turn-around of decision makers as well as prioritize diversity in new hires to encourage decision makers who are more representative of the audience
- Develop a demographic study of the screenwriters, directors and producers
- Identify any barriers in current funding structures and definitions relative to the changing definition of feature film and the various distribution methods used to reach audiences
- Identify any gaps in funding for mid-career filmmaking
- Explore ways to increase funding for development
- Explore how to increase funding for production and for co-production
- Explore the development of an Ontario brand to promote feature film to media and the public followed

Introduction

The following report is a research partnership between the Directors Guild of Canada (DGC), Producers Roundtable of Ontario (PRO), the Writers Guild of Canada (WGC) and Ryerson University. DGC, PRO and WGC formed a Steering Committee and partnered with the Image Arts Department at Ryerson to conduct research into Ontario's feature film industry to give voice to the creative participants, *specifically to the core creative team of writer, director and producer* and to provide an assessment of the human aspect of the industry. Statistical analysis of feature films is released each year by the Ontario Media Development Corporation (OMDC) and Canadian Media Producers Association (CMPA) as part of annual reporting on film and television production. That data can be useful in assessing the size and impact of the industry but these reports provide little context to explain the data and they don't attempt to provide any assessment of the human aspect of the industry. This report seeks to provide complementary data to provide a snapshot of the eco-system of the feature film industry and to look at the challenges that might be hindering its growth and explores some of the solutions proposed by those who work in the industry.

As this report will demonstrate, technology, business models and distribution methods for feature film are evolving and bringing into question not only how to define a feature film but also where feature film stands. Thousands of festivals all over the world celebrate feature films and young people continue to pour out of universities and colleges with aspirations to make them. The arguments for feature film tend to be about the art of storytelling. As one of this study's survey respondents shared:

Features are a singular platform for expressing stories in the visual media. Films alone allow for a powerful and unique storytelling format channeled through the strong creative leadership team of writer, director and producer.

Or, as one film academic put it:

Film matters because film is us. We as a society use the filmic form to tell stories about who we are and our society – they are a record of what makes us human and what concerns us in the everyday. ... Film offers us a language to speak to each other across national, class, economic and racial lines – film is a phenomenon that allows us to understand cultures and people.¹

If this form of storytelling is to survive and even thrive in Ontario, it is important to understand the challenges and opportunities being experienced by participants in the Ontario film industry.

The goal of this study is therefore to assess broad patterns in the experiences of screenwriters, directors and producers in Ontario within the context of the available data on the industry and to gather anecdotal evidence that may help in establishing best practices or strategic recommendations for sustaining and growing creative talent in the feature film industry in Ontario.

This report has three main sections. The Ontario Feature Film Landscape provides an overview of the industry to provide context. There are reports (see Appendices and Footnotes) that can be accessed for greater information but top line data is provided here. The second section outlines the major issues facing Ontario Feature Films today as shared primarily through one on one interviews and survey responses collected from participants in the industry, and the final section identifies Professional Development Opportunities identified by the research that have the potential to strengthen the sector.

¹ Lincoln Geraghty, University of Portsmouth, cited in Why Does Film Matter articles published by Intellect Publishing [https://www.intellectbooks.co.uk/MediaManager/File/filmcatalogue\(web\).pdf](https://www.intellectbooks.co.uk/MediaManager/File/filmcatalogue(web).pdf)

Methodology

Under the direction of the Steering Committee, Ryerson conducted three stages of research:

- A review of third party research on the feature film industry in Ontario and a review of feature film support programs in other jurisdictions: Quebec, Manitoba, Ireland, Sweden, Australia for comparables (see Appendix "D").
- An anonymous online survey performed through SurveyMonkey and disseminated via organizations like the DGC, PRO, and WGC to their members, posted in media reports from organizations like Ryerson University and *Playback*, as well as the Academy of Canadian Film and Television, FilmOntario and the CMPA, and sent to an extensive list of festival coordinators in Ontario for distribution. The survey was disseminated in the Summer and Fall of 2016. There were 124 responses received. As the survey was opt-in, the respondents could not be selected to ensure a representative demographic breakdown. It should be noted that the respondents did skew heavily older (63.6% 40+), white (75.8%) and male (66%). Further study would be needed to compare these demographics to the actual representation in the sector.
- Thirty-six interviews were conducted with screenwriters, directors, producers, and industry stakeholders from different stages in the value chain (e.g. funders, festival organizers, distributors). These individuals were selected based on their experiences in filmmaking, diversity, and availability—an attempt was made to interview screenwriters, directors, and producers who were at different points in their careers, and who were reflective of the diversity of the industry as a whole. The interviews were undertaken at Ryerson University in the Summer and Fall of 2016. The interviews were video and audio recorded when interviewees consented and the Ryerson Board of Ethics approved the entire process. The transcripts of the interviews were approved by the interviewees and then analyzed using thematic content analysis. Excerpts from the interviews were included in the report to illustrate these themes. Video clips from the interviews are available at: focusonfeatures.ca.

Kelly Lynne Ashton (see Appendix "A") was then engaged to work with Ryerson to aggregate the data and prepare the final report.

Ryerson Ethics Protocol

This research was approved by the Ryerson Ethics Board which reviews all research submissions by university instructors and confirms the adherence of the research to ethical principles. All human subjects signed consent and release forms and were apprised of the research being undertaken. For more information about the ethics protocol please visit : <https://www.ryerson.ca/research/resources/ethics/>

Ontario Feature Film Landscape

The Ecosystem

There is no typical feature film. Some come together quickly and others take more time. Budgets can range from next to nothing to tens of millions of dollars. However, they all go through a similar process that calls upon the skills, experience, determination and willingness to risk of the three essential driving forces: the “triad” of writer, director and producer. Surrounding these three key entrepreneurial “drivers” are a myriad of specialists and support providers, individuals, companies and organizations, referred to as the “ecosystem.”

See Figure 1a (The Ecosystem) on page 19.

Canadian Feature Film Life Span

Figure 1b is a graphic representation of the time and money associated with a hypothetical \$2M film. What this graph immediately illustrates is the relatively long period of time it takes to get a project in front of the camera and then pushing the finished film into the marketplace. The actual making of the film represents only 10% of the time, and 80% of the money.

See Figure 1b (Feature Film Life Span) on page 20.

The Ecosystem



Figure 1a
This is intended as a representation of the ecosystem and is not exhaustive.

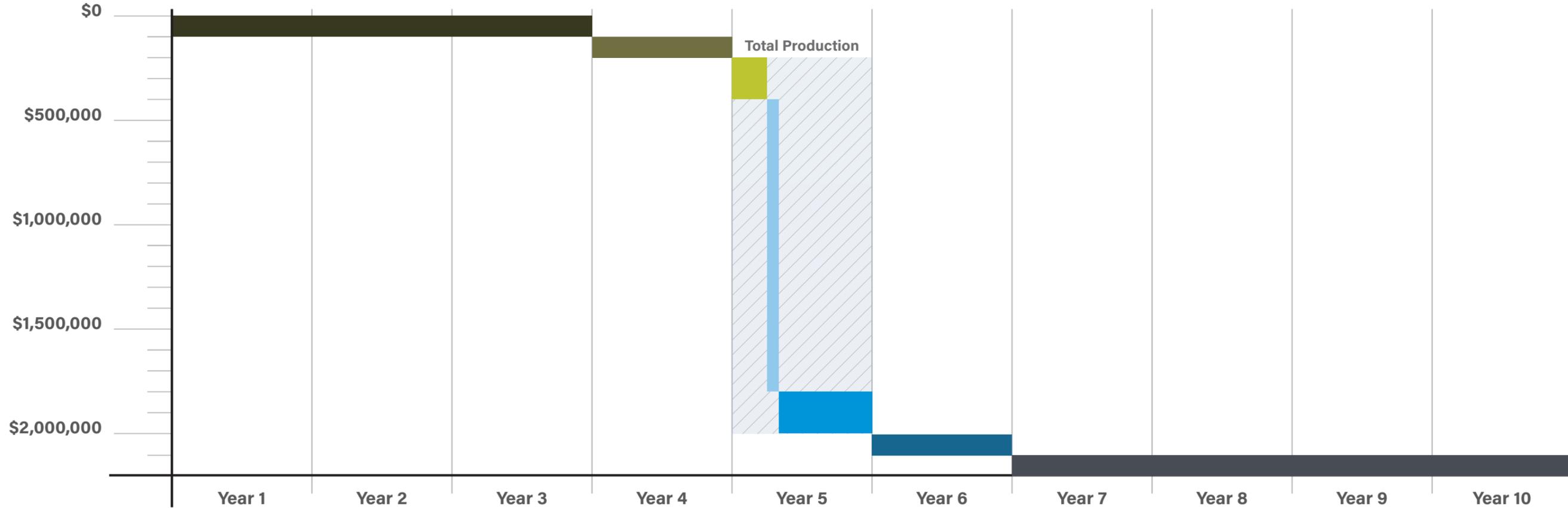
Feature Film Life Span

Hypothetical \$2 Million Canadian Film

Assumptions

Canadian content film supported by public agencies
 Making the film = \$2 million
 Marketing the film = \$100 K

Cumulative Production & Marketing Expenditures



Project Development - Screenwriting, Identifying potential Investors & Markets
 Time: 3 years Expenditures: \$100,000

Packaging - Financing, Casting, identifying Key Crew
 Time: 1 year Expenditures: \$100,000

Preproduction
 Time: 3 months Expenditures: \$200,000

Shoot
 Time: 2 months Expenditures: \$1,400,000

Post Editing & Finishing
 Time: 7 months Expenditures: \$200,000

Marketing
 Time: 1 year Expenditures: \$100,000

Longtail
 Time: 4 years (at least) Expenditures: \$0

Figure 1b

Historical Context for the Ontario Feature Film Sector

When looking at the size of the feature film industry in Ontario one distinction that must be made is between the domestic industry producing feature films that qualify as Canadian content and the location service or foreign production industry which is (primarily) Hollywood studios and US broadcasters and OTT services filming big budget features and television programs in Ontario. Most government support (such as Telefilm, OMDC funding, tax credits, film festival support) goes to the domestic industry but they also support foreign production (for example through production service tax credits that incentivize expenditures on Ontario goods and services and through the Ontario Film Commission location support services) because foreign productions hire crews and performers, lease studio spaces, rent equipment and are a significant player in Ontario's ability to maintain and grow its feature film and television industry infrastructure. However, it must be noted that feature films produced by foreign production companies are not developed in Ontario, rarely hire Ontario screenwriters or directors and do not always engage Ontario crew in key positions or hire Ontario lead actors. Foreign productions may hire an Ontario producer to physically produce the film but that producer generally will work only for producer fees and has no financial or creative control and no ongoing share in revenues. The copyright in the film is not held in Ontario. Foreign productions provide essential learning opportunities, particularly on bigger budget productions, and can raise the profile of Ontario talent to a world stage², but, as confirmed by the interviewees, only a domestic industry will provide Ontario creators with opportunities to tell their own stories.

The constant concern is whether there is enough domestic production or whether too much of Ontario's resources are given over to foreign production. This is a historical issue given that Ontario has long been a service work haven for international (mostly American) productions that helped to build the Canadian industry as a whole. Regardless, Ontario's film industry is a vital and forceful presence in the province's creative industries and the culture of the country.

An analysis of the OMDC data³ on domestic and foreign feature films produced in Ontario demonstrates that foreign feature films spend a lot more money in Ontario over fewer productions than do domestic. Feature films are not a long term reliable business like many television series are, and there is a small sample size each year, so there is a substantial fluctuation from year to year in terms of the number of features shooting in Ontario of either category as well as average budgets. The data does demonstrate that most years there is more money being spent in Ontario through the production of foreign feature films (and it should be noted that both foreign and domestic television production far exceed either feature film category).

² Guillermo del Toro's Oscar-winning "The Shape of Water" featured Ontario locations and earned Oscars for several Canadians, https://www.huffingtonpost.ca/2018/01/25/the-shape-of-water-shows-ontario-like-youve-never-seen-it-before_a_23343884/ Retrieved April 3, 2018

³ OMDC Production statistics, please see Appendix C for detailed data

Based on production value, in 2017 Ontario was the third largest centre for Canadian feature film production in Canada, after Quebec and BC, though in most years Ontario produces significantly more Canadian feature films than BC⁴.

According to CMPA Profile 2017 statistics, Canadian feature films rely heavily on provincial and federal tax credits and Telefilm Canada, and, where it is available, provincial equity investment, for their financing⁵. While feature films can have very distinct financing plans depending on the subject matter and the production company's track record and experience, the data identifies that public financing is the main source of financing for Canadian feature film at 61%.

Federal and provincial governments invest in domestic feature films for both cultural reasons (the importance of home grown stories) but also the contribution film production can make to jobs and the Gross Domestic Product (GDP). While Canadian feature film generates significantly less labour income and less GDP than Canadian television (roughly 10% of both labour income and GDP) or Foreign Location and Service Production (FLS) film and television production (roughly 8% of labour income and GDP), it still makes an important contribution to jobs and the economy in Canada⁶.

One of the biggest struggles in Ontario feature film is being seen by audiences. As per CMPA Profile 2017, 92 domestic feature films were produced in Canada in 2017. The number of feature films released theatrically in the U.S. is 8 times that amount (736⁷) and many of them are the big budget Hollywood movies that dominate theatres in both markets. *Black Panther* had a budget of \$200 million US⁸ (\$252 million CAD), a budget level that is fairly common for a Hollywood blockbuster, and is almost 20% higher than the aggregate budgets of all English Canadian feature films in Canada in 2017 (\$216 million CAD). Though data on *Black Panther's* Canadian marketing budget is not available, its global marketing budget was estimated at \$150 million US (\$189 million CAD)⁹. Compare that to Telefilm contributing \$10 million CAD to the marketing of 87 Canadian films in 2016-17 and it suggests that Canadian marketing budgets are a fraction of Hollywood marketing budgets. Even a modest independent US feature such as *Get Out*, which had a budget comparable to many Canadian films at \$4.5 million US (\$5.78 million CAD) was able to make significant inroads into the market with a global marketing budget of \$30 million US (\$38.56 million CAD)¹⁰. It should not be a surprise therefore that Canadian films earn a fraction of the entire box office in Canada, 1.8% in 2016, due to their lower budget level and substantially less promotion.¹¹ It should also be noted that unlike television, where the CRTC sets exhibition quotas for Canadian programming, there is no quota or other form of obligation for Canadian theatres to exhibit Canadian feature films¹².

⁴ CMPA Profile 2017, please see Appendix C for detailed data

⁵ *ibid*

⁶ *ibid*

⁷ <https://stephenfollows.com/how-many-films-are-released-each-year/>

⁸ <https://www.the-numbers.com/movie/budgets/all>

⁹ <https://www.forbes.com/sites/natalierobehmed/2018/02/20/a-426-6-million-opening-makes-black-panther-the-top-grossing-film-with-a-black-cast/#2fe44a7812a6>

¹⁰ <https://www.thewrap.com/get-out-split-box-office-return-investment-2017/>

¹¹ CMPA Profile 2017, please see Appendix C for more detailed data

¹² Note that in an attempt to address the lack of obligation to exhibit Canadian feature films, Telefilm has launched the Theatrical Exhibition Program as an incentive to encourage the programming of Canadian feature films in theatres

Consumer behaviour is evolving and more and more Canadians are watching feature films of any kind at home and saving the theatre outing for the Hollywood blockbusters. A look at market share for Canadian films on other platforms supports this concept as Canadians are watching many more Canadian films on television (pay, specialty, conventional and VOD) than in the theatres. For example, while the market share for English Canadian films is 0.8% of theatres, it is 9.8% of total views on PayTV¹³. Note that data for Canadian consumption of Canadian feature films through OTT services such as Netflix and Amazon is not released by such services but they have the potential to be a significant channel for Canadian feature films given that Netflix alone is estimated to have 6.7 million subscribers in Canada¹⁴.

Telefilm looked at these overall trends in their annual Audience Engagement Report¹⁵. 53% of Canadians watched a Canadian movie in the past year, up 5% from 2016. 65% expressed that they were interested in Canadian movies, up 4% from 2016. This suggests that there is a growing audience for Canadian films and that perhaps a theatrical release is not as important as providing Canadians with the opportunity, one way or another, to watch Canadian films.

¹³ CMPA Profile 2017, please see Appendix C for more detailed data

¹⁴ <http://business.financialpost.com/telecom/media/netflix-doing-booming-business-in-canada-industry-research-reports-suggest>

¹⁵ Telefilm Audience Engagement Report November 2017 (retrieved March 26, 2018) pg. 43

Issue Topics

What is a Feature Film?

Traditional definitions of feature film have focused on both the length (75 to 120 minutes) and the initial release to the public (intended for release in movie theatres). The Telefilm Canada Production Program requires a feature film to have a minimum length of 75 minutes and to 'be aimed primarily at the Canadian theatrical market while maximizing distribution on alternate platforms'¹⁶ That definition reflects the ongoing evolution of the format felt by many who were surveyed and interviewed. Is theatrical release really a necessity in defining the format when so many films are watched in the home?

Kate Taylor, cultural journalist and lead film critic for *The Globe and Mail*, explained the conflict between the technical definition based on theatrical release and the cultural definition:

They are predicting a day where we will only go out to the cinema to see a few big, big blockbusters. Mainly we'll download films in our home. The Netflix model will come to dominate and will make much less distinction between a film, a feature film, and a television series. That distinction will start to blur a lot for us as we watch most of the content in our home rather than going outside to an event, to a cinema. But still, despite that, despite this technological development and those kind of market place developments, the reality is that in a cultural sense [...] feature film is where we tell the biggest stories to the most people.

Tim Southam, Sturla Gunnarsson, and Atom Egoyan—three of Ontario's most well-known feature film directors — each discussed in their interviews the major changes the feature film form is undergoing and the inherent conflict of the traditional definition with the changes to how audiences access feature films and the overlap with popular and critically acclaimed episodic television series.

From Tim Southam's perspective, the length of a feature film is artificial and based on a business model that no longer exists. However the format can be distinguished from television based on the finite nature of the story and the creative control of the filmmaker:

[...] Feature film is begging for a redefinition because to say simply that it's something that you would show in the cinema, I think, misses the point which is that most viewers now watch everything – all film – at home. ... There's still this sort of thing we have in us as makers and viewers that looks for the sort of 90-minute to 120-minute closed-arc story, that is to say a story with a beginning, a middle and an end, which we can watch more or less in that timeframe which it was invented, of course, by the cinemas of the day because they could then fit two screenings into a night. ... And we find that long-form filmmakers, people who enjoy making feature films also enjoy making, for instance, miniseries or limited series with the caveat that, really, they have to be the singular voice in the chair for the beginning, middle and post-production ... of making that film.

¹⁶ Telefilm Canada Production Program Guidelines, <https://telefilm.ca/en/financing/production> (retrieved March 26, 2018)

Atom Egoyan explained this phenomenon as well stating that:

[...] Feature film needs a culture of people who understand the form. It's a very specific form, especially in our day now of the series. The [TV] series has its own following. And, right now, it has a larger following for serious series than we might find for serious feature film. ... really, in some ways, the Rolls-Royce of storytelling now is to have a prestige series. It gives the writer a lot more control than they've ever had. ... In feature, it's still the realm of the director, [...] I think what we'll have to understand in the future is that there will be an audience who really appreciate the feature film. But they're not going to the feature film as their main conduit for serious drama. That might happen through any one of a number of different digital platforms, either series or, as we said before, a fifty-minute film, a twenty-minute film. There's no reason why it has to remain at a ninety minute to two-hour film for commercial distribution reasons. It's only because that's a particular form that is able to tell a story in a particular way.

If a theatrical release is no longer a defining characteristic of a feature film, what impact does that have on funding and distribution? Sturla Gunnarsson cautioned that while feature films have changed, the infrastructure to support them has not kept up:

I think it's actually a really important discussion, the question of what is a feature film because it is no longer a theatrical experience or at least not necessarily a theatrical experience. That leads to all kinds of interesting discussions around the way we set up our system around who the gatekeepers are to the system: people who have been empowered in that system are still talking about an industry that doesn't exist anymore.

The strictness of "silo-structured" funding (i.e. separate funds for feature films, television, linear digital programs) and licensing related to those silos, may no longer apply in this fluid and evolving world, both creatively and in the marketplace, with regard to how the feature film form is financed. It is clear, however, that a feature film, as a closed-arc, unique form of story-telling remains a vibrant and important form, distinguished by the particular creative relationship of the director to the form.

Suggestions for future consideration (below) therefore include reviewing how definitions and funding structures could be revised to better support an evolving definition of feature film that is not restricted to a particular length and/or theatrical release.

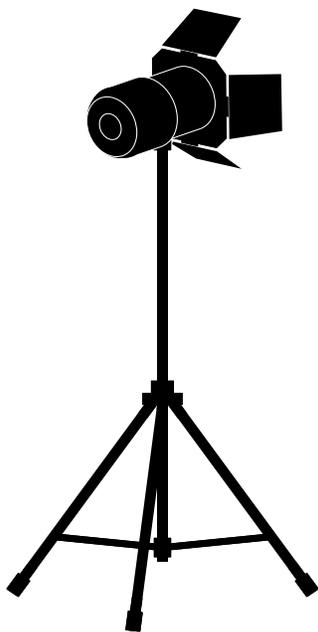
Screenwriter, Director and Producer roles

A screenwriter is defined by the Writers Guild of Canada under the Independent Production Agreement (collective bargaining agreement) as 'a person who writes Script Material' and Script Material is the various written material such as Story, Script and Treatment, over which the WGC IPA has jurisdiction. The Merriam-Webster dictionary is more succinct – they are a writer of screenplays.

The Canadian Audio-Visual Certification Office (CAVCO) defines the director as 'the person who controls the action and dialogue in front of the camera and who is therefore responsible for realizing the intentions of the scripted concept'¹⁷.

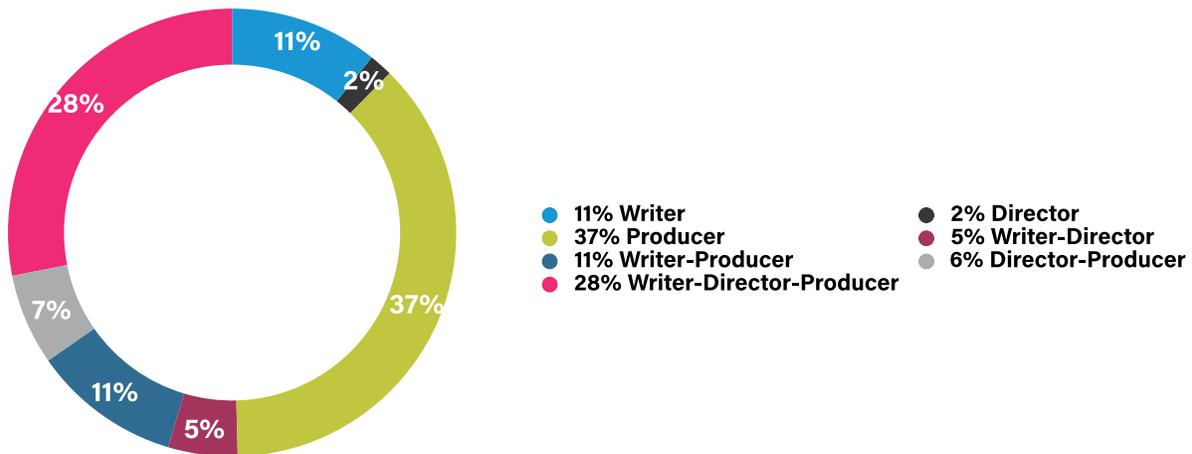
CAVCO also defines the producer as the person who:

1. controls and is the central decision-maker of the production from beginning to end;
2. is directly responsible for the acquisition of the production story or screenplay and the development, creative and financial control and exploitation of the production; and
3. is identified in the production as being the producer of the production.



¹⁷ <https://crtc.gc.ca/canrec/eng/guide1.htm#s9m>

Fig. 2 Job Classification of Survey Respondents



While the above definitions define distinct job functions, each requiring their own skill set, within the interviews it became clear that many of the interviewees have chosen not to stream into only one role: screenwriter, director, or producer; most notably, to work as writer/directors (aka auteurs). The interviewees for this study reflected an openness to taking on multiple roles or changing their roles depending on the film. Many worked as auteur directors and/or as producers worked very closely with the creative team, or they worked in different roles on the same projects. In the survey, we had 37% of individuals identifying as producer-only (n=124) and 50% identified taking on a hybrid role as a screenwriter-director, screenwriter-producer, director-producer, or a screenwriter-director-producer. The breakdown of these numbers is seen in Figure 2 above. There did not appear to be any correlation between the level of experience of these screenwriters, directors, and producers, and the combining of roles.

Ian Carpenter, when asked to describe his occupation stated: "I'm a screenwriter, story editor, producer, occasional director – probably in that order." Atom Egoyan, Jason Lapeyre, and Aeschylus Poulos all described the auteur process and explained that for them, taking on more than one role in the filmmaking process gives them greater control over the finished project. For Albert Shin, taking on multiple roles has come out of necessity as he indicates that the films he and his producing partner make are not films that would exist unless they took on more than one role to fund and create the film. For these interviewees then, they did not see the screenwriter, director, and producer as job functions that needed to be performed by separate people and in fact out of budget necessity might need to be performed by the same people, without lessening the amount of work that needs to be done.

When asked about the relationship between screenwriters, directors, and producers when they are performed by different individuals, interviewees gave a wide range of responses with most of them indicating that they frequently work with the same talent. There were no clear patterns regarding the operation of these roles beyond the fact that the relationships tend to be different on each film and for different content. Mars Horodyski indicated that for her, the relationship between director and producer is very important, stating:

It's not easy to find someone that you're going to connect with who understands you as a person, as a storyteller and has similar goals in terms of what they want to do and also who's going to stand by you past one film.

A number of the interviewees indicated that they operate as screenwriters/directors and, as Nadine Valcin explained, are often looking for a like-minded producer who has the same sensibilities and the same drive to make the project.

Interviewees had different opinions on the relative importance of the screenwriter, director or producer roles in getting feature films financed and produced. Some of the interviewees identified the screenwriter and the script as being the most important element of the film. Other interviewees (Jonathan Bronfman, Mehernaz Lentin, Marty Katz) explained that the clout of the director was important in attracting talent to the film. For Leila Basen the difficulty in being a feature film screenwriter is that there just isn't enough work:

it's a hard way to make a living because it's so random and very few -- it seems to me that feature films get smaller every year in Canada rather than larger. Very few writers get hired to write features.

Jonathan Bronfman explained that the social and career capital of the director and screenwriter help to attract financing, and/or talent. Nadine Valcin pointed to the producer as the "first kind of face of the project" to the funders, followed by the director and script, a common perception given the requirements of Canadian public financing. Andrew Cividino thought that attracting funding may be different at different levels - productions with well known producers may attract funding quite quickly, whereas lower budget films may be more author driven. Jason Lapeyre is a screenwriter, director and producer who evolved into all three roles to facilitate his interest in being a feature film director:

My goal in life was always to be a director, but I learned very early on that you can't be... a good director without mastering screenwriting. ...to be a director and a screenwriter who has some measure of control over the work that they're doing, it is necessary to have ownership of what you're doing. And so the producing that I've done has either been out of necessity or it's because I wanted to support a friend or a colleague.

Control was the issue for Jeremy LaLonde as well:

I think the importance of that trinity of writer, director, and producer is to maintain control creatively. Especially since I'm working on limited budgets. I'm not being paid enough to walk away and to not care, you know? I always work with a producing partner because I don't want to do the boring stuff, the paperwork and all that kind of stuff.

The "fluid" nature of the screenwriter, director and producer roles, whether a person is carrying responsibility for more than one function or not, reflects the flow and demands of the workload in independent filmmaking with the "trinity" actively engaged creatively and invested in the financial and market success of the film.

Career Path and Professional Development

Training

Ontario has thirty-two universities and colleges for studying film, television and media studies (both production and theory) with both undergraduate and graduate programs. The Canadian Film Centre (CFC) also offers post-graduate training in film, television and digital media. Certainly the survey respondents are well educated as 97% had some form of post-secondary education.

Additionally, there are both formal and informal training opportunities through organizations like the Liaison of Independent Filmmakers of Toronto (LIFT), Women in Film and Television (WIFT), TIFF, and other mentorship programs which help creators transition from other industries or job positions within film and television or to advance within their chosen profession. For example: WIFT has a series of single evening and multi day programs including a four-day development incubator, and director, producer, and production manager mentorship opportunities. However, as mentioned by our interviewees, there are also informal mentorship opportunities provided by industry members. For example, InkDrinks is a monthly networking event for screenwriters that helps emerging screenwriters meet potential mentors and employers. These informal networks were seen as essential to career development by several interviewees. Warren Sonoda advised:

You show up to things. If you put your face in front of people that are doing things and then you get to do them too and it's that simple because if you don't show up, if you just kind of sit at home and watch Netflix or play 'Call of Duty' then you'll do that. That's what you'll do. And if you did that, when you make your film and you make the call or you put it out on Facebook that you need this, people will help you and that's real power.

Then there's Wayne Clarkson's 'just do it' advice:

Going to the movies is the best thing you can do as a start, and the myriad of young filmmakers, established film makers that I've gotten to know over the years are all avid film goers. The second thing is 'just do it'; make a short film, make your first feature.... isn't that what the iPhone is for?

Many of the interviewees knew from early ages that filmmaking was going to be their passion. Albert Shin, Niv Fichman, Gavin Michael Booth, Leila Basen, and Warren Sonoda, knew from childhood that filmmaking was for them - playing with Super 8 and VHS camcorders from early ages - while other interviewees (like Marty Katz, Gail Harvey, Adam Till, and Tim Southam) moved into the industry from different fields and disciplines such as law, photography and journalism.

For Patricia Rozema, the transition to filmmaking out of journalism might never have happened without the funding:

The big, big important thing about my beginning is that I had the great good fortune to begin filmmaking at the time that the Telefilm Feature Film Fund began and the OFDC, the Ontario Film Development Corporation started. There was new money for fiction film.

Mark Slone felt that there is not enough training as there is a lack of incubators for the roles of screenwriters and producers in the current industry. He explained that finding screenwriters for content is often difficult. There is also a barrier that prevents less experienced producers from accessing funding and distribution because:

The nature of the funding system requires a high level of expertise and negotiating that system. It's an uncoordinated funding system between provinces, agencies and the feds, so it means that a producer really does have to understand multiple funding systems to be able to pull the financing together.

If funding is only given to producers who have the necessary expertise to access it, then the funding system itself prevents the development of new producers and with them the increased likelihood that these producers will engage new creative talent (screenwriters, directors, and actors). Paul Barkin indicated that this is a key issue in the sustainability of the industry as the Ontario feature film sector does not have sufficient resources to develop emerging talent. Cameron Bailey also points out that though the system of funding known producers makes sense in terms of ensuring a return on investment, it can lead to a very specific kind of content creation:

...when you've had success as a producer, you sometimes want to protect your investment and taking risks on proven talent can sometimes [...be] too big a step for many of them to take. So, I think there's something in the current setup in the policies that are in place right now that tends us all towards conservatism and a little bit of a safety in terms of the films that we see coming out the other end of the pipeline.

More specific incubators or training sessions to teach and train this material in addition to developing new production projects, could potentially work to help lessen the knowledge gaps between established screenwriters, directors, and producers, and those at mid or early career levels. These incubators may assist in creating a sustainable domestic industry or trained and knowledgeable producers, screenwriters, and directors.

Mentorship

Regardless of their education or how they got into feature films, the interviewees indicated that mentorship was important in helping them build their careers. As Jane Tattersall stated:

I'm the product of a lot of people being helpful along the way.

Interviewees, when asked about mentors, stated everyone from Robert Lantos (an oft-cited mentor), Marty Katz, Michael Levine, or Dan Bekerman, to their high school teachers, and to close friends who they met through the various programs in Ontario (including: LIFT, WIFT, and various incubators). Jennifer Jonas' mentor was Ilana Frank, who was an active feature film producer at Norstar Entertainment before turning to producing television series:

My first producer credit on a feature was given to me by a producer here called Ilana Frank. She does mostly television now. ... And Ilana gave me a chance to have my first producer credit on a feature and she taught me a very important lesson, which is everything that happens is a producer's fault.

Karen Thorne-Stone, President and CEO of the OMDC suggested that while some members of the industry make real and personal commitments to mentor young filmmakers, there is no formal mechanism to ensure that mentoring takes place to help young filmmakers break in. Some existing mechanisms include mentorship programs run by CMPA and WIFT-T. They may be insufficient to meet demand but they could provide a model for additional formal networking programs.

It is not clear whether there is enough informal networking and mentorship taking place to ensure that emerging creators have the guidance and opportunities to develop their craft. Formal programs like the NSI Feature First¹⁸ program provides learning opportunities but also mentorship with an experienced story editor and networking through attendance at the Toronto Screenwriting Conference. More, and different kinds of programs, could supplement the ad hoc mentorship to ensure that there is ongoing development of the talent pool.

Talent Pool

Many screenwriters, directors, and producers interviewed were of the belief that there is a disproportionate number of experienced filmmakers who receive funding in Ontario—a misperception echoed by the survey respondents. One participant said:

We have great crews and we make and tell great stories. However, the funding bodies in Ontario spend too much time concentrating on old filmmakers and large films they think are sure bets, rather than creating a large slate of new and unique films made by talented newcomers and professionals.

One survey respondent added that one of the biggest weaknesses in the Ontario industry right now is:

A lack of support for producers. Too much creative interference [at] the funding bodies. A reliance on supporting the same handful of “famous” Ontarians ... who are all good filmmakers worthy of continued support, but with that, a lack of support for other mid-career filmmakers such that they migrate to television or to the U.S.

However, to the perception that only a handful of filmmakers receive financing, according to Telefilm’s 2016-17 annual report, 53% of the titles funded were for first or second time directors. Their projects only generated 14% of Canadian box office receipts but this was expected by Telefilm as ‘early works are typically lower budget films that act as a filter to identify new and promising creators’¹⁹. The Fast Track stream approach, which gave “successful” experienced producers an accelerated evaluation process, likely encouraged the misperception that Telefilm primarily financed projects from experienced filmmakers despite several programs, including the new Talent to Watch program specifically designed to support first features and the new Fast Track Stream for Second Features making it easier for second features for successful first timers. The gap may actually be between support for emerging filmmakers on the one hand and the small pool of experienced filmmakers who can count on receiving financing. It is the mid-career filmmakers in the middle who may have the greatest challenge battling risk-averse decision-makers who would rather entrust mid to large budget films to known filmmakers with a lot of experience, who likely benefitted from the Ontario Film Development Corporation (OFDC) funding support that was available in the 1980s and 1990s that didn’t exist when the mid-career filmmakers of today were getting started. Unfortunately, the industry does not track the stats necessary to determine the validity of that premise.

¹⁸ <http://www.nsi-canada.ca/courses/nsi-features-first/apply/>

¹⁹ Telefilm Annual Report 2016-17, pg. 17

Turnover of Decision Makers

Several of the survey respondents (about 10%, or around twelve of the survey respondents) when asked about the current weaknesses in the industry, volunteered very clearly that a major issue in the funding system is that they feel that the same people are on the selection committees and heading the funding bodies for long periods of time. While that number may not seem significant, the fact that so many volunteered that answer in response to a question about the current weaknesses in the Ontario film industry does make it worth noting. One participant said:

...terms should be fixed, 4-year terms to ensure diversity of voice at the funding level.

Another participant said:

Telefilm leaders should be rotated out of regions or out of the organization entirely at fixed terms.

When asked about what they would change in the industry, one participant said:

I would replace the people in charge of making decisions as to what projects get funded. I say this because my most recent feature script was rejected for funding by virtually every single agency we applied to, but still went on to be nominated for best feature film at the WGC awards.

Some of these participants suggested that if the funding bodies are run by the same people, and are funding the same filmmakers, that the films being made could be considered to be “safe” or lacking in experimentation. The funders play an important role in deciding what films get made. The survey respondents and interviewees described the result as a kind of content curation - films are made because they fit a specific viewpoint, or mandate at that time.

A mandated turnaround of the decision makers at funding bodies would not support an institutional memory but would likely assist in negating the perception that the same screenwriters, directors, and producers are receiving funding, would possibly promote a more diverse docket of funded films, and would potentially increase the innovation in filmmaking in the province. There are models in other jurisdictions that could be reviewed.

Career Sustainability

One of the themes that came from the interviewees in this study was concern about the sustainability not just of the industry but also of their careers and well being in the industry. For many of the interviewees they need to find a way to balance projects that they are paid for and which are creatively driven by someone else, with projects that they may need to invest their own time or money to see to fruition. Several of the interviewees indicated that to get their passion projects made, they have to do work outside of their specific interest²⁰. A greater degree of funding would not only allow more creators to work in feature film but would also allow for a greater diversity of genres as filmmakers, and funders, would be in a better position to take risks.

Several of the interviewees stated how especially difficult this balance is for screenwriters and this problem was also discussed by the survey respondents. Leila Basen and Jason Lapeyre explained that filmmaking (screenwriting specifically) is a very difficult career in which to maintain a reasonable balance. Basen explains:

You make a living writing television. ...so you know let's say there's this feature that I'm writing now. I got above scale to write it and if that was the only thing I was doing this year, I still wouldn't make a living. I wouldn't be making a living even if I wrote up to the second draft [...].

Ian Carpenter stated something similar when discussing his work on television versus films. He explained that:

it breaks down to stuff in production supports your speculative work.

Nadine Valcin explains:

I think the obstacle is always, [...] finding money, finding the way to do your next projects, so either, you know, writing grants or convincing somebody, some gatekeeper somewhere to love your idea and to invest in it. [...] I think that that's what we all struggle with and struggle between doing work that you're really passionate about and sometimes just doing work to pay the bills while keeping that spirit going, it's that constant juggle.

On the other hand, as discussed above under the section "What is a Feature Film" as the two formats blur and television becomes more creatively challenging, more Ontario filmmakers may find that television offers them training, career development and creative satisfaction as well as the ability to pay bills. Greater funding to feature films would help to support filmmakers to make the choice to develop feature films instead or as well as television.

²⁰ See in particular the quote from Mary Sexton in the *Maudie* case study below re needing to work on the television series *Republic of Doyle* to earn the revenue necessary to pay her *Maudie* screenwriter

Diversity

Representation in the feature film industry has been a hot button topic in the last several years as it has been in most creative industries. Cameron Bailey shared that:

Diversity and inclusion have been top of mind for us at TIFF and have been for quite a while.

As Tim Southam said in talking about the DGC:

Our members understand that our sector has to be as representative as the country. We are the mirror of our country. It's important that what we do mirror the realities of our country and who works to produce those images and those stories be representative of our country.

The focus of government programs has been on gender parity and Indigenous representation with Telefilm, the CBC, and the NFB all committing to gender parity. In 2016, Telefilm committed to gender parity in its portfolio by 2020 but announced in a preliminary report one year later that they were on their way to meeting that goal with 44% of funded films having a female director, 46% a female screenwriter and 51% a female producer.²¹ Telefilm has also supported industry programs to advance women in the industry such as the Women in View Five in Focus program.²² Carolle Brabant noted, however, ...

...bigger-budget films continue to pose the greatest challenge. Moving forward with our partners, this will be our focus.

Nadine Valcin would like to see more internships or job shadowing opportunities to help a woman or person of colour get into the industry because she thinks it would:

...help break down barriers because when you're on the outside you really feel like you're on the outside and ... you have to find the doors.

Rob King suggested that these internships have been working with women directors and should therefore be extended to other underserved categories of talent.

To illustrate the challenge, Jane Tattersall recounted the story of a friend working on a popular TV show in Toronto and asking the showrunners why they hadn't hired any female directors:

they said: "oh, you know, we really tried, we really, really tried, we contacted" - and then he named I think about four or five different people, women. And he said, "but they were all busy." Now the four or five people he named are top, top, top female American directors. So while they're willing to hire a woman director, they want them to be extremely experienced, whereas they give opportunities to two young male directors who have no experience directing television. ... So it's almost like the standards - like the expectations for women are higher, like it's a higher bar.

²¹ <https://telefilm.ca/en/news-releases/statement-carolle-brabant-executive-director-announcing-preliminary-results-telefilm-canadas-gender-parity-measures>

²² <http://womeninview.ca/initiatives/five-in-focus/>

Both Cameron Bailey and Kathleen Meek pointed out that in terms of storytelling in Ontario, there is an obvious lack of Indigenous stories being told. Bailey said:

The oldest stories in Ontario are Indigenous stories and for some reason they are just so rarely seen on the big screen from Ontario filmmakers. ...I do think that there is a whole, deep well of powerful dramatic, sometimes painful, sometimes beautiful, poetic stories from the Indigenous cultures of this province that need to be told and they need to be told as movies because they're just such a powerful art form. And I just hope that all of us can help that to happen, whoever's got the green light power, whoever can get money for these films, whoever can get them into theatres, whoever can get them a festival like us, I think there's a responsibility there, honestly.

On February 1, 2018 Jesse Wenthe was appointed Director of the new Indigenous Screen Office to support the development, production and marketing of Indigenous screen content and storytelling in Canada. The office was created in collaboration with the Aboriginal Peoples Television Network, CBC, CME, Telefilm, CMPA and the NFB. Bell Media, Harold Greenberg Fund and VICE Canada are associated partners. At the time of writing the Indigenous Screen Office is still under development. According to a speech given by Jesse Wenthe at the CMPA PrimeTime in Ottawa conference on February 1 2018, the Office has a small amount of funding for two years but Wenthe will be looking to establish permanent funding so that they can support storytelling on all screens.²³

Meanwhile the NFB has launched the website Indigenous Cinema²⁴ to offer free streaming of the NFB's short and feature length films created by Indigenous filmmakers between 1968 and 2017. The website is part of the NFB's three year Indigenous Action Plan. Telefilm's Canada Feature Film Fund (CFFF) has set aside funding for an Indigenous stream. To be eligible the majority shareholder of the production company must be Indigenous and two of the screenwriter, director or producer must be Indigenous.

²³ As per tweets of Kelly Lynne Ashton (@klashton27) February 1, 2018

²⁴ https://www.nfb.ca/indigenous-cinema/?&film_lang=en&sort=year:desc,title&year=1917..2018

While funding programs are focused on gender parity and Indigenous representation, several of the interviewees talked about the importance of a more general diversity of storytelling and storytellers. Wide diversity is important for the DGC, as evidenced by the number of initiatives Tim Southam described. Southam felt that the academic and training institutions are doing a good job at recruiting a diversity of talent but once they graduate the talent have difficulty getting hired. There are two ways to develop a career: 1) to have a self-made project financed and 'just do it' (as Wayne Clarkson recommended above) or 2) get hired on a project. The DGC is focusing on creating opportunities to get hired.

We've struck a committee, the sole objective of which is to improve opportunities for what are described as underrepresented workers in our sector and underrepresented stories in our sector. The Directors Guild of Canada is also in a very active dialogue with the institutions, the public institutions which support the screen sector in Canada and remind them of their obligation as essentially agents of the state, to be fair. And we are also, internally, we've open the doors in many, many ways to newcomers in our union by reducing criteria for admission, by reducing the cost of admission to certain categories, particularly for directors, and making our organization more available to anyone who wants to work in film with the proviso that, once they are working in film, they'll become fully-fledged dues-paying members and be contributing to our various, you know, member resources, like our health plan and our pension, like everybody else. But the idea is to get out of the way, is to have as few barriers to entry as possible, and then actively promote opportunities.

For Mark Slone diversity isn't just a "nice to have" but a business imperative:

So I think one of the things that needs to be done, that isn't being done right now, is that the funding agencies need to develop policy for equity that will ensure access for all communities. And I don't just say this as somebody who believes in access for all communities as a civic obligation, I also say it as a businessman who understands that people like to see themselves represented on screen.

Patricia Rozema argued that in order for there to be more diversity in the industry, we must create a system that allows and develops that diversity through opportunity and mentorship. Cameron Bailey and Mark Slone discussed the diversity of audiences in Ontario - and Toronto specifically - showing that there is a market in the province for diverse films. While many interviewees pointed to diversity of ethnicity, religion, language, gender, and sexuality as an issue for creative talent, crew, and within the stories told, some also pointed out the need to mirror that diversity at the funding bodies.

Jennifer Kawaja brought the issue back to the decision makers:

And I think the decision makers have to be diverse and that doesn't mean a black person making decisions about black stories, I'm talking about sort of post-identity politics understanding of diversity because diversity - it's diversity across all kinds of things, class, it's not just about race. What about working class people behind the camera? People who haven't gone to a private school in Toronto, who can't afford to go to university, who cannot afford to take months off and go to the Canadian Film Centre. Are those people making our stories and our decisions or are we a group of decision makers who come from privileged educated (white) families?

Development and Production

Development

Many interviewees talked about the challenges of developing feature films. Development involves optioning any underlying property such as a play or novel, writing drafts of a screenplay, location scouting, preliminary casting and budgeting and travel to markets to interest financiers and/or potential co-producers. There are limited resources to fund development, primarily Telefilm, the OMDC and the Harold Greenberg Fund, which means that producers, screenwriters and directors are undertaking the development that they can afford rather than the development that the project needs. Several of the survey respondents talked about the need for more funded development to ensure that the best possible scripts (and therefore more successful films) are funded and produced and so that time and resources expended by the creators are recognized and compensated.

Success in the Ontario feature film industry is directly linked to adequate development according to Jennifer Jonas:

Right now, again in English Canada, there's not a robust enough, in my view, development support for script development. And that's a slippery slope, because if you don't have the time and the resources to hone the best scripts we can make in English Canada, then it will bottleneck and restrict and reduce the prize-winning, fabulous films that we're all ready to make.

Allison Black explained:

The development assistance that comes from the government and Telefilm and the OMDC and the Harold Greenberg Fund, these are essential elements to the life of a producer and of a filmmaker, a writer-director, producer, actually the whole film industry relies upon them.

Kathleen Meek spoke about how finding payment as a screenwriter in the development stage is particularly hard and the result is that more films are made that aren't ready to be produced because there was no money to pay the screenwriter for additional drafts. She said:

[...] there aren't really a lot of development resources available. And therefore, you know, the idea as a working writer, how are you paying the bills? How are you spending the time that you need to get your script into a place so that it's marketable and can attach cast and all those things needed to trigger financing?

The Bell Media Harold Greenberg Fund (HGF) was started in 1986 and has “invested \$85M in the Canadian film and television industry.”²⁵ The fund supports story optioning, script development, and the development of short films to feature films. Roughly one-third of applicants to the HGF are funded each year. There is fluctuation in the rate of successful applications and the number of applications received but the amount funded each year has steadily increased in the past few years.²⁶

²⁵ <http://www.bellmedia.ca/harold-greenberg-fund/us-2/>

²⁶ See Appendix C for a chart with more detail on the rate of successful applicants as set out in <http://www.bellmedia.ca/harold-greenberg-fund/annual-reports/>

However, even so, in 2017 \$1,002,050 funded 76 projects which averages out to \$13,185 per project. A feature film minimum script fee is \$55,973 under the WGC Independent Production Agreement (the collective agreement negotiated with the Canadian Media Producers Association). Most development budgets would include other costs mentioned above including producer fees and overhead. A producer would therefore have to piece together a development budget including combinations of HGF, OMDC and Telefilm development funding and even then would be unlikely to be able to finance the full development of the script and all other work necessary during development. The OMDC spends roughly \$300,000 on development each year with an average contribution of \$23,366 per project but funds less than 20 projects in development each year.²⁷

A script fee is generally paid in stages (i.e. Treatment, First Draft, Second Draft) which allows the producer to break down the development budget into stages that can be financed. With only one-third of HGF applicants receiving funding there is a high risk of not being able to fully finance development from available resources. Instead, producers rely on unpaid activity and/or developing a property only as financing is available. Without strong support for the early drafts of the script, the project is often ill-prepared for the demands of packaging, the stage when the script is shown to potential financiers and cast.

Jennifer Kawaja spoke about how this functions realistically for screenwriters and producer stating:

Can you imagine, you're a writer, and as a producer I say to you, well we can raise enough money for you to write the treatment. And that's \$20,000. Well it could take six months to write a treatment. And the producer will get, if they're not deferring, two, three, four, five thousand dollars. But that's if you are lucky, usually you get nothing. And you have tons of paperwork to do. You have office, you have overhead, you need pay yourselves. And you get it (the funding) at each stage. How does that work? It doesn't. It just simply doesn't. It doesn't relate to the process, it doesn't relate to a writer—the producer saying, here's \$55,000 that the WGC says it costs to write a feature film. If we can get that money for you, can you put aside the year? You don't have to think about anything, you can write. You don't have to think about all the other jobs you need to line up while you're writing.

Production Financing

In the Feature Film Landscape section above this report outlined the average structure for financing feature films in Canada. The data however does not identify how many projects cannot get financed and therefore get into production. Canada's cultural funding system is based on a per project analysis rather than funding companies that can produce content. The result is that while funders have more direct control over what gets funded, producers have difficulty building a sustainable business because they take a risk with each project that they will not be able to finance it. It should be noted that as many producers are required to defer their producer fees in order to complete production financing that further erodes their sustainability and ability to fund their own film development. It would be a useful topic for further study to review jurisdictions which have added corporate support or slate financing to their cultural funding toolkit to identify successful programs for consideration. While not every project will creatively deserve to be financed, the high rate of application rejection from Telefilm, the OMDC and the HGF suggests that there are insufficient resources to meet demand.

²⁷ Data provided by the OMDC

As indicated in more detail in the charts in Appendix "C"²⁸ almost half of the films that apply to Telefilm Canada with budgets more than \$2.5 million are successful. At the OMDC the success rate was 32% in 2016-17. Despite a ten year gap between 1995 and 2005 when film financing was cut by the Ontario government, there has been a steady increase in demand. Though the OMDC funding has increased from \$1.5 million to \$4.5 million (a 230% increase), demand has increased by over 800%.

The Northern Ontario Heritage Fund has become a new player in Ontario's film financing landscape. The NOHFC was created to stimulate job creation and the development of specific industries, including film and television, in Northern Ontario. The NOHFC has provided more than \$85.6 M to 139 film and television productions since 2013. The increased travel and accommodation costs of importing non-Northern Ontario cast and crew and shipping of equipment not available in the region could offset the additional financing, but the NOHFC has been an important source of new financing for Ontario feature films that can take advantage of the Northern Ontario locations such as *Indian Horse* (Campanelli, 2017) and *Painted Land: In Search of the Group of Seven* (Ellis, 2015). Allison Black found the NOHFC to be very useful and has seen it help to develop the industry in Northern Ontario:

I've shot both my films, my produced films, in Sault Ste. Marie, because of the Northern Ontario Heritage Fund incentives, which are incredible. Both those films were perfectly creatively suited to be shot up there as well, which is great.... And to have those incentives in Ontario is incredible and I know that whole North is flourishing economically and with mentorship and crew learning, because of the incentives of that fund.²⁹

²⁸ See Appendix C for charts detailing the funding and acceptance rates for HGF, Telefilm and OMDC

²⁹ Note that Allison Black is referring to *Citizen Gangster* and *Mean Dreams*

Some filmmakers can access the arts councils (Canada and Ontario) for production financing. In an episode of *The Agenda* episode about Canadian film on April 20, 2017, Kazik Radwanski and Andrew Cividino both mention that they used Arts Council funding to make their respective films. According to the data from their 2015-2016 report, the Canada Council provided grants of \$3.6M to Film and Video Artists (this does not include grants for film festivals, film collectives, or travel grants for filmmakers). In the last ten years, the Ontario Arts Council success rate for operating and project applications in Media Arts is roughly 46%.³⁰ Note however, that arts councils provide production grants to individual artists and have a very low budget cap (Ontario Arts Council sets the budget cap in their Media Artists program at \$75,000 for emerging artists and \$300,000 for established artists) and in the case of the Ontario Arts Council specifically excludes any project that will apply for tax credits. Arts councils are therefore of limited value for larger or more commercial feature films though they do provide operating grants to film festivals and arts collectives which help to support emerging filmmakers.

Due to the limitations in funding set out above, Ontario filmmakers have traditionally explored co-productions to complete their financing. Though a co-production requires the sharing of copyright (and ongoing revenues) as well as the sharing of producer fees and corporate overhead they are often essential to completing the financing of a film. Co-productions can be between provinces, to access funding in each province or internationally. International co-production treaties exist between Canada and 57 other countries. Once certified a co-production gains access to domestic financing and policy structures in each country as if it were a domestic production. Each treaty can have distinct rules but generally a Canadian producer must contribute a minimum of 20% of the budget to an international co-production and retain a minimum of 20% of the ownership. There are other requirements related to residency of key crew and performers (which can reduce the Canadian creative input significantly), creative control and rights to distribution. Over the life of the treaty there should be a balance of minority and majority co-productions. In addition to access to additional financing sources, co-productions can provide access to markets and talent that would be otherwise unavailable.

An example of a recent international treaty co-production is *Hevn*, a \$2.5M budget film and Canadian/Norwegian co-production created with assistance from the OMDC. Ontario based producer Paul Barkin delivered post-production in Toronto, a Canadian composer for the score, and other creative contributions to the film. Other Canadian co-productions of note in the last few years include the feature film *Room* (2015) and the animated feature *The Breadwinner* (2016).

A major development for international co-production opportunities for Canadian films is the announcement in 2017 of Canada's becoming an associate member (the only non-European) of Eurimages³¹, a European fund for feature film financing for projects from member countries. For qualifying productions, this provides an additional source of financing not previously available. Several Canadian projects have recently been announced as recipients of Eurimages financing including *Sweetness in the Belly*, an Irish-Canada co-production from Ontario producers Jennifer Kawaja and Julia Sereny. Dedicated co-production funds such as Eurimages encourage producers to pursue co-productions and seek financing outside their territory, relieving some of the pressure on domestic financing.

³⁰ Media Arts programs fund a variety of activity and genres including: Festivals, Production Centres, Screening Series, Training Organizations, Professional Development, Audio Art, New Media, Animation, Documentary, Drama, etc. For a full list and description of Media Arts programs see <http://www.arts.on.ca/grants/discipline/media-arts>. There were 3,958 applications in the past ten years with 1,842 successful applications.

³¹ <https://www.coe.int/en/web/eurimages>

Ontario productions often also rely on more informal sources of production funding that are not detailed in Fig. 5 in Appendix “C” under the category Other Private, such as in-kind equipment, deferred salaries, crowd-funding or personal loans. These sources of funding are especially important for emerging screenwriters, directors, and producers who often feel that they do not have access to the more formal funding sources given their inexperience.

Various discussions in recent years have centered around how private investment in feature film might be stimulated with tax incentives at the federal and/or provincial level. Increasingly producers are finding it necessary to turn to private investment, which is a tool often used by independent producers in the U.S., to close their gaps in financing, but there are no tax incentives at present to stimulate such investment. Conversations are also on-going with public equity funders about the recoupment placement of private investment and the request for a better position than the public funds.

Some interviewees indicated that though flawed, they felt lucky to have the government funding support for feature film that does exist.

Jason Lapeyre said:

It's a flawed system. But at the same time, I don't think there's a perfect version of that system. It's inherently a problematic system [...] Certainly, it needs to be constantly interrogated and it needs to evolve constantly to respond to things like technological innovation and shifting demographics and, you know, things like gender parity are a real issue. But we're still lucky to have it.

As demonstrated above, the per project financing structure and the difficulties in finding that financing raises concerns about the sustainability of a feature film industry in Ontario. Karen Thorne-Stone shared her concern that the industry relies too heavily on government subsidy and is not focused enough on whether there's a market for the stories that filmmakers want to tell. With her industrial lens, Thorne-Stone wants there to be strong self-sustaining feature film companies but the lack of focus on what stories the audience wants to see could be undermining that goal.

Jennifer Kawaja suggested that more slate or corporate production financing would help sustain feature film companies:

I think that support for companies to develop projects as they see fit, producers who have a track record, to me makes sense, because it's not piecemeal. People can plan. You can have a slate. You can ideally change - like if one script's not working ... I would love somebody to say, you know, which writers or writer/directors do you want to work with, in the next three years to develop projects, and I would say here's five, and Telefilm or OMDC would give us the support to work with those five people to do whatever they wanted to do with us.

Production Challenges

One of the challenges in making feature films in Ontario is the success of the foreign service sector. Sometimes there is so much foreign service production and post-production that domestic filmmakers have difficulty finding crews, studio space, labs or gear or they are not able to afford them because the foreign service work has increased the rates. James Weyman, consultant and former OMDC executive expressed it as:

It's a bit of a double-edged sword, because you know, there's incredible talent and you can do anything here, both production and post-production. But because the production volume is so high, it's quite challenging for independents who don't have the budgets to compete for those resources, certainly at peak times.

Understanding the difference in budgets between foreign service and domestic and the need to support a domestic industry that will still be here even if the foreign service work dries up (as it did during the SARS crisis and after the economic downturn), services and equipment providers often offer domestic productions a discount. Jane Tattersall (formerly founder of Tattersall Sound, now part of SIM Post) describes the thought process:

If someone comes to us with an interesting idea, we just try to figure out a way we can... get their film finished, because we know... if they don't have decent post-production, it's just going to die.

The other downside to foreign service work is the perception that it has created a feature film sector in Ontario that is 'industry' rather than an art form. According to Sturla Gunnarsson:

The down side of it is that it creates a mentality, an industrial mentality that does not encourage the independent voice. If you look at the films that come out of Quebec, those are authored films and if you look at the films that come out of the other sort of regions of Canada, they all tend to be more unique, they all tend to have stronger voices and that's a generalization. That's not all of them and certainly there are voices in Ontario but there's a tendency for the work that comes out of the so-called regions to have a stronger voice and I think the reason for that is this sort of doubled edged sword that we have in Ontario, which is that we are the industrial engine.

On the other hand, foreign service work can also offer opportunities for those still learning their craft, as it did for Michael Dobbin:

Canada benefits from a lot of service production. I did, in my early career working on American movies with big budgets. And, you know, what that does for us is it gives us the craft and it gives us the chance to learn from others.

The booming television sector also creates a challenge to the feature film sector. In 2016/17 the volume of the domestic television sector in Canada was \$2.9 billion compared to \$318 million for feature film. In Ontario there were 196 television series, mini-series, movies of the week or pilots in 2017 for a total spend in Ontario of \$692.3 million compared to 38 feature films spending \$80.6 million. Television can therefore be steady work which can pay the bills as well as develop skills and at times can be more appealing than taking the risks to develop a feature film. Jennifer Kawaja however, pointed out that television can also be a threat to feature filmmaking creators explaining:

A lot of feature filmmakers like ourselves who are still making feature films are moving heavily into television and the reason that we're making TV, besides the fact that it's the only way we can make a living, is in some ways we can make more interesting TV than we can films. So I think that, in terms of threats to the feature filmmaking community in Canada and Ontario that is a fairly big one, experienced producers are moving over to TV and if we can make television that travels internationally, even better.

TV can be a more direct threat when people advise creators to go into TV instead of feature film, as a producer did to Rob King early in his career:

You're nuts. You should try to get into TV because you'll improve your chops and you'll actually make a more regular pay cheque.

However, Mars Horodyski has planned her career path to be directing both TV and feature film and sees them as complementary:

The long-term plan has been doing TV directing and doing features ... Once you get into them you can really sustain yourself and make a very good living and have time to work on your own stuff. That is the balance I've been aiming for where I can work on TV and also it's an amazing way to just be better as a director because having time on set, time will go by as a feature filmmaker if you're making a feature every two years and you're rusty. You don't have that time on set to keep things moving and learning new things, so I love that aspect of TV.

Another major pressure in production comes from the impact of technological changes on making feature films. Technological innovations such as digital cameras and laptop-compatible editing software lower the barriers to entry for feature filmmakers. While big budget productions are more likely to use traditional technologies, it is easier for emerging filmmakers to make a calling card short or even feature length using their own resources. Several interviewees mentioned the ability of emerging filmmakers to now make movies using their phones. For Gavin Michael Booth, the freedom of no-budget or self-financed production that comes from new technologies is artistic:

Every person you add to bring money to the table to make a film comes with some level of creative control or decision making, and that can be wonderful. ... but often more fringe ideas or very outside of the box ideas aren't understood and sometimes it just takes having ultimate creative freedom to explore that to its potential so it doesn't get watered down or sort of turned into a more traditional film, and you know, a lot of ideas that I have are like that, so I'm trying to balance myself between kind of maybe one film that's fun to do the traditional model and then one that's self-funded or done sort of on a no-budget structure so that we can have the freedom to make the art that we want.

He also draws the connection between lower barriers to entry through technology and increased informal mentorship as more experienced filmmakers help out those who are less experienced with their super-low budget projects:

The idea of ... everyone's laptop coming preloaded with some form of iMovie or Windows Movie Maker, kids have much more access to get involved and sort of flex that creativity. ... [M]ost of the filmmakers I know are mentoring people in some way, shape or form. There's a huge boom in independent film in Canada because, you know, these movies can be made for \$5,000 or \$15,000, so the self-starter mentality, I think, is helping to nurture a lot of creativity because people that live in each of these cities where these driven filmmakers are, are getting the access to work on sets.

It is difficult to say where these technological innovations will take the feature film industry in part because they are a contributing factor in the redefinition of feature films and their convergence with television and digital media. As mentioned above, the interviewees largely work in multiple media forms because of financial reasons, opportunity, and the major changes to television that make it creatively rewarding while audiences watch films in the theatre and at home and on their phones. As a result, there isn't a clear picture yet of how exhibition and distribution practices and format definitions will become standard in the next few years.

Marketing and Reaching Audiences

Promotion

For Canadian film the big challenge is what is increasingly being called 'discoverability' or in other words being found in a crowded marketplace dominated by big Hollywood films and their promotion. Several initiatives have developed over the years to help Canadian films get discovered. The biggest hurdle may be however, the outdated perception by Canadians that Canadian film is not very good. Kate Taylor referred to this attitude when she said:

I think Canadians are often out of touch with Canadian film. ... I think average Canadians remain, or many Canadians, remain ignorant of Canadian film, it's kind of a niche interest. You still encounter really, really outdated reactions to Canadian film. One of my lines when people say they don't like Canadian film [...] is, how would you know, when did you last see one?

Cameron Bailey takes what he calls a more 'realist' approach to the issue of Canadian attitudes to Canadian film:

As much as I try to be optimistic, I'm also a realist and I recognize that most Canadian viewers, moviegoers don't really care that much where a movie comes from. They just want to be entertained by it, they want to be engaged by it, if it happens to be Canadian, great.

There are several government agency and grassroots non-profit groups trying to break through this negative/ uncaring attitude, and the relative lack of promotion dollars available to Canadian filmmakers, to get more Canadians to watch Canadian films either in theatres or online.

The First Weekend Club³² is a non-profit founded on the concept that the audience numbers for the first weekend of a theatrical release can make or break a film and the theatre's willingness to support it, including the length of time they will keep it in the theatres. The First Weekend Club promotes Canadian films through emails, social media, contest and interviews to push audiences to see the film in its first weekend. Knowing that not everyone sees films in theatres they also partnered with the NFB in 2015 to launch Canadascreens.ca, an online movie rental service for Canadian film.

REEL CANADA³³ is a non-profit that celebrates Canada through our feature films. They run three programs, one brings feature films into schools across Canada, another helps teachers teach ESL programs using Canadian film and the third is a promotion of Canadian film through an annual National Canadian Film Day (most recently April 18, 2018).

In addition to the Toronto International Film Festival and year-round programming at Bell Lightbox, TIFF also has an outreach program, Film Circuit³⁴, which brings the best of Canadian and international film to communities across the country, to provide Canadians with choices beyond what their local multiplex is showing.

Eye on Canada³⁵ is a partnership between Telefilm Canada, the Canada Media Fund and the Canadian Media Producers Association to promote Canadian film, television and digital media. They use the hashtag #eyeoncanada in social media and use the website to promote content. They also promote the YouTube channel Encore+, a partnership between the NFB, CMF, Bell Media, Deluxe Toronto, Google Canada and Telefilm Canada, which provides audiences with older Canadian film and television programs including classic Canadian films such as *I've Heard the Mermaids Singing* and *Thirty-Two Short Films About Glenn Gould*.

In celebration of Canada's 150th in 2017, Telefilm, in partnership with Apple, launched, iTunes Rendezvous Canada boutiques to increase access and visibility of Canadian content. The boutiques spotlight Canadian films with 450 titles available internationally now in Germany, France, the US and the UK. The initiative is expanding and is promoted through social media campaigns with Telefilm providing funding for digitizing and translation expenses.

For its part, the OMDC has been using the hashtag #ONcreates to promote Ontario-produced content in film, television, digital media, music, magazines and books. They promote Ontario feature films at TIFF including featuring the filmmakers at a cocktail party. They promote Ontario feature film award winners both domestically (Canadian Screen Awards) and foreign (Oscars, BAFTA).

³² <https://www.firstweekendclub.ca> <http://www.reelcanada.ca>

³³ <http://www.reelcanada.ca>

³⁴ <http://v1.tiff.net/filmcircuit>

³⁵ <https://www.eyeoncanada.ca>

Distribution

As mentioned above, the market share for viewership of Canadian feature films is much higher through television (conventional, pay, specialty services and VOD) than in the theatrical market. On the one hand, theatrical exhibition is dominated by Hollywood big budget movies while on the other hand consumer habits are shifting increasingly to home viewing. Telefilm is still trying to make inroads in theatrical though as it has launched a new program that will provide a financial contribution to commercial exhibitors based on the number of Canadian films it exhibits.

Telefilm demonstrated in their report "Overview of the Canadian Feature Film Industry 2012-2015" that new technologies provide new opportunities to reach Canadian audiences but that they also provide challenges in terms of monetizing across digital platforms and promoting Canadian audiences to discover Canadian films³⁶ as discussed above. They explain that "With respect to theatrical releases, while many in the industry affirmed the importance of this window, given the challenges that Canadian feature films have had (in particular English-language feature films), the industry may wish to continue to canvass new approaches to the theatrical release of Canadian feature films, such as event scheduling and shortened windows" (p. 20).

Several of the reports undertaken by Canadian Heritage also indicate that the internet and web based applications like Vimeo and YouTube and SVOD like Netflix, and Amazon Prime, are key locations of access for audiences however, it isn't clear yet how these new distribution channels are changing the distribution/exhibition practices of Ontario feature films and what new financing models may look like.

In the Fall of 2017, Netflix announced that it will spend \$500M over the next five years on the production in Canada of content for the platform, and will set up its first production location outside of the US in Canada. However, at this time the streaming service will not be required to abide by the same Canadian content quota rules as terrestrial broadcasters and there is no requirement that the investment is incremental or that it be spent on certified Canadian content. There is also no commitment to commission feature films.

John Galway, President of the Harold Greenberg Fund, pointed out that often audiences find out about Canadian films at TIFF but access them through television and SVOD. He also indicated that Torontonians are lucky to have exhibition outlets like HotDocs and TIFF to see films outside of the already "crowded marketplace."

Indeed, film festivals in Ontario provide an important exhibition opportunity for independent Canadian film (some lists suggest that there are fifty-six film festivals just in Toronto). There is everything from major International Festivals like TIFF and Hot DOCS, and regional festivals like Bay Street Film Festival in Thunder Bay and ethnic film festivals like ReelWorld, Reel Asian, CaribbeanTales and Indigenous film festivals like imagineNATIVE. In a NOW article from April 2017, producer Jennifer Liao said "Festivals are now where a small Canadian film might find its largest theatrical audiences, and the digital release is now crucial to whatever life it will continue to have."³⁷

³⁶ Lafontaine, M. (2015, March 31). Overview of the Canadian Feature Film Industry: 2012-2015. Retrieved from: <https://telefilm.ca/en/studies/overview-canadian-feature-film-industry-2012-2015>

³⁷ Wilner, N. (2017, April 5). Canada's new wave of cinema. NOW. Retrieved from: <https://nowtoronto.com/movies/canadas-new-wave-of-cinema/>

Indeed, the three films surveyed in the Case Studies section all got their start in the festival circuit. Independent films are distributed to a variety of venues in Toronto alone: Bloor Hot Docs Cinema, Revue Cinema, the Royal, The Regent, TIFF Bell Lightbox, Fox Theatre, Humber Cinemas, Carlton Cinema, AGO Jackman Hall, Stephen Bulger Gallery, Isabel Bader Theatre, The Drake Screen Lounge, Workman Arts, CineCycle, The Gladstone, Double Double Land (Kensington Market), and Cineforum. There are also smaller and more informal screening series to see films like the monthly screening series put on by production company MDFF at TIFF Bell Lightbox. As mentioned above, TIFF's Film Circuit and Reel Canada exhibit films around the country.

The DGC is working on initiatives to get more viewers choosing Canadian features by ensuring that more Canadian features are available on traditional broadcasting, including expanding the definition of Programs of National Interest at the CRTC to include a specific category, and obligation, for Canadian feature films that must be met by broadcasters, specific obligations for Canadian films in SVOD and pay TV programming, and to encourage more investment in the Canada Feature Film Fund to increase the available supply of Canadian feature films.

Sturla Gunnarsson explained that the system for distribution in Ontario has taken over as the gatekeeping mechanism in creating films in the country, and province. With the shift in distribution models, in order for Ontario to develop a sustainable system, he suggests that funding shouldn't necessarily be based on whether or not a distributor is attached. He said:

We're still clinging to an industry that doesn't exist anymore. The gatekeepers for feature filmmaking are now the distributors but the distributors are actually not in the business of distributing Canadian films. That's not what they do. They sub-distribute American product in the Canadian market and for them the independent Canadian film is the price of doing business. It's the price of the protection that they have for having a market set aside.

There has been a growth in new forms of distribution including self-distribution. A filmmaker can use a service such as Vimeo³⁸ to sell or rent their film directly to the consumer. Aggregators such as Quiver³⁹ or bitMax⁴⁰, two services currently active in this market, pick up the digital distribution rights to independent features and then license the packages to VOD platforms like Netflix, Amazon and iTunes. In addition to being able to get titles on the digital platforms, the aggregators offer services such as digitization and storage and provide portals with real-time reporting. Gunpowder & Sky is both a digital studio and aggregator, offering filmmakers production services as well as distribution on digital, theatrical and television. Given the discussion above about 'What is a Feature Film', Gunpowder & Sky's definition of their company is interesting in its expansiveness: "Gunpowder & Sky is a global studio, dedicated to creating, marketing and distributing video content unrestricted by form, genre or platform."⁴¹

³⁸ <https://vimeo.com>³⁹ <http://v1.tiff.net/filmcircuit>

³⁹ <https://www.quiverdigital.com>

⁴⁰ <https://bitmax.net>

⁴¹ <http://gunpowdersky.com>

New skills are needed to take advantage of these new forms of distribution including in particular how to use social media to reach the target audience directly and drive them to the digital platforms. Telefilm is supporting this development with funding through their Marketing Program for producer-driven releases using digital marketing and digital distribution. The OMDC has recently started a modest fund to support producer initiatives in marketing.

Many of the interviewees identified that the old systems of distribution and exhibition are not what we should be talking about and instead we need to be acknowledging the television boom and considering how film and television are different with the current proliferation of digital and mainstream platforms.

More work needs to be done in understanding how SVOD might be used to further finance, distribute, and alter the Ontario market for features. This includes getting more information from the SVOD providers and increasing the transparency of who is using their services. To date the main SVOD providers have refused CRTC requests for such data. SVOD could be an opportunity for an alternative release market that could bring larger audiences to Ontario features and that could finally solve the problem (or at the very least supersede the American exhibitors and distributors) of foreign dominated exhibition. These programs could also expand the audience reach allowing niche films from Canada a global market, but without access to data it will be difficult to assess progress.

Archival

A few interviewees pointed out that the industry cannot ignore its history. Older feature films should be digitized and there should be a program that ensures access to Canada's feature film legacy or as one survey respondent said:

The films made in the past need to be digitized at a high level so that they can be available for education, for training, for audiences so that they might come to know the work - so much work has simply "disappeared" because it cannot be accessed for today's technologies and platforms.

TIFF has undertaken an archival campaign to restore, maintain and store a collection of 1500 international film prints which were donated to TIFF⁴² and they host the Film Reference Library including the Canadian Film Encyclopedia, the Canada on Screen Digital Catalogue and archives of scripts, photos and other production material provided by prominent Canadian directors. The NFB has been working its way through its extensive catalogue of films, digitizing and making them available online. Library and Archives Canada is mandated with preserving Canada's documentary heritage and a copy of every film Telefilm finances is required to go to Archives Canada. However, there does not seem to be a comprehensive strategy for maintaining the full rich heritage of Canadian feature film.

⁴² <https://www.theglobeandmail.com/arts/film/tiff-acquires-nearly-1500-film-prints/article32855378/>

Case Studies of Three Ontario Feature Films

Jean of the Joneses, *Maudie*, and *Mean Dreams* are three Ontario features released in 2016. Each film has achieved success in box office, critical acclaim, and/or the career of the filmmakers. All three films also have quite different paths in their production and distribution. This section will survey the films, reviews, and public data around the films and their release. Each of the films started on the festival circuit and gained momentum for different reasons: screenplay, genre, content, actors, and location.

Jean of the Joneses

Jean of the Joneses is a 2016 film written and directed by Ontarian Stella Meghie and produced by fellow Ontarians Floyd Kane, Amos Adetuyi and Stella Meghie. It is a very low budget film (\$1.1 million) that was financed by Telefilm and private investment, including contributions from the producers and U.S. production company Tenth Productions.⁴³ The film is a comedy about a Jamaican-American writer (Jean, played by Taylour Paige) and her family as they discover each others' secrets and the ties that bind them together. The film premiered at SXSW in 2016 to largely positive reviews. Justin Chang from *Variety* described the film by saying: "If *Jean of the Joneses* feels fresher than most multigenerational ensemble dramedies, credit not only the relative novelty of an all-black, mostly female cast, but also screenwriter-director Stella Meghie's talent for suggesting the invisible bonds that unite her characters, despite their many disagreements and (in some cases) general disagreeability."⁴⁴ *The Globe and Mail* gave the film four and a half stars and said "this later-than-usual coming-of-age tale takes its cues from both Woody Allen's self-indulgent worlds and the literary panache of Zadie Smith, but remains original in its darkly funny perspective on the contemporary black experience and that universal feeling of having lived a third of your life but still being no closer to figuring it out."⁴⁵ And the *Hollywood Reporter* said "It's not at all surprising that the Toronto-born Meghie landed representation by CAA shortly after the film's March premiere at SXSW—she's a natural storyteller with an ear for literate yet spontaneous-sounding dialogue."⁴⁶

Jean was nominated for best first screenplay at the Independent Spirit awards, best original screenplay at the Canadian Screen Awards and Outstanding Screenplay at the Black Reel Awards. In fact, *Jean* was so well received that very soon after its debut at SXSW, Meghie was hired to adapt the YA novel "Everything, Everything" into a U.S. film. The adaptation was released in 2017 and made \$61M worldwide.⁴⁷ Meghie acknowledges that it is very rare to get a second feature so quickly after the first. She told *Indiewire*: "I just know how hard it is, and you know your indie friends don't make the jump that quickly, and I was still literally on the festival circuit. I had just premiered 'Jean' and I was thinking, 'Okay, what festival are we going to go to next?'"⁴⁸

⁴³ <http://playbackonline.ca/2016/11/09/coming-soon-jean-of-the-joneses/> and <http://playbackonline.ca/2015/11/03/jean-of-the-joneses-shoot-underway-in-t-o/>

⁴⁴ <http://variety.com/2016/film/festivals/jean-of-the-joneses-review-1201741611/>

⁴⁵ <https://www.theglobeandmail.com/arts/film/film-reviews/jean-of-the-joneses-is-a-darkly-funny-later-than-usual-coming-of-age-tale/article32795937/>

⁴⁶ <https://www.hollywoodreporter.com/review/jean-joneses-laff-review-903403>

⁴⁷ <http://variety.com/2017/film/news/everything-everything-will-packer-on-the-photograph-exclusive-1202599428/>

⁴⁸ <http://www.indiewire.com/2017/05/everything-everything-black-woman-filmmaker-stella-meghie-studio-film-1201828752/>

Meghie is developing work for Warner Bros. and BET,⁴⁹ and is writing a feature for VH1 with Alicia Keys set to produce.⁵⁰ In October of 2017, *Variety* also announced that Universal had acquired “The Photograph”, a spec from Meghie with Will Packer set to produce. Meghie will also executive produce and direct.

Jean is not discussed in the media as an Ontario feature. In the reviews and documentation about the film, Meghie is described as a Toronto writer/director and some information is provided about the film being shot in Ontario, but as the film is set in Brooklyn, there is little in the reviews that brands the film, or the writer/director, as either Ontarian or Canadian. In fact, media downplays the filming in Toronto though it was shot 15 days in Toronto with only 2 days in Brooklyn.

The distribution strategy of the Canadian distributor, Search Engine was to open small in two Toronto locations, with only social media and Internet advertising to capitalize on the promotion behind the short U.S. theatrical window and U.S. television broadcast. If the Canadian theatrical release did well, then they would expand to more theatres.⁵¹

Meghie started writing *Jean of the Joneses* while working on her Masters in Screenwriting at University of Westminster in 2011. The script won the Showtime 2012 Tony Cox Feature Film Screenplay Competition and earned her a joint fellowship between Tribeca and the Canadian Film Centre in 2014. The fellowship allowed her to go to LA and New York and meet with studio and network executives. From there she landed a blind script deal with Warner Bros Television. Meghie felt that no one knew the subject matter as well as she did so decided to direct herself. She was identified by *Playback* as one the 2015 Five to Watch.⁵² All of this activity by Meghie as an emerging filmmaker laid the groundwork in creating interest in *Jean of the Joneses* once it was ready to hit the festival circuit in 2016.

Maudie

Maudie (2016) is a Canadian/Irish co-production that was directed by Irish director Aisling Walsh and written by Sherry White (an Ontario resident in 2014). On the Canadian side, the film was produced as an Ontario/Newfoundland inter-provincial coproduction by Heather Haldane and Mary Young Leckie from Screen Door in Toronto and Mary Sexton and Rink Rat Films in Newfoundland. The film is based on the true story of Nova Scotia painter Maud Lewis and it stars Academy Award nominees Sally Hawkins (UK) and Ethan Hawke (US). The film premiered at the Telluride Film Festival and screened at a number of Canadian festivals including: TIFF, the Atlantic Film Festival, Vancouver, and Calgary.

The film was shot in Newfoundland—a controversial decision as Lewis was a Nova Scotia painter. However, there were a number of factors that made shooting the film in Newfoundland more feasible. Most notably, Nova Scotia reduced their tax credit in 2014, which led to less production in the province and fewer potential crew.

⁴⁹ <https://shadowandact.com/trailer-premiere-stella-meghies-dramedy-jean-of-the-joneses/> and <http://www.latimes.com/entertainment/movies/moviesnow/la-et-mn-jean-of-the-joneses-stella-meghie-taylor-paige-sxsw-20160318-story.html>

⁵⁰ <http://cfccreates.com/alumni/1465>

⁵¹ <http://playbackonline.ca/2016/11/09/coming-soon-jean-of-the-joneses/>

⁵² <http://playbackonline.ca/2015/09/09/playbacks-5-to-watch-stella-meghie/>

Mary Young Leckie, one of the Toronto producers of the film, noted that it was a lost opportunity to shoot in Nova Scotia but made financial sense after the collapse of the tax credits.⁵³ Post production for the project was done in Ireland.⁵⁴

Maudie was a box office success in Canada. It was the third highest grossing Canadian film in 2017 bringing in approximately \$2.84 M.⁵⁵ In Atlantic Canada there were some theatres with lineups around the block and the film beat *The Fate of the Furious* (the top grossing film of the weekend).⁵⁶ The film has received mixed reviews with much being written about Hawkins' portrayal of Lewis. *Variety* states: "what little dimension *Maudie* offers is a direct result of Hawkins' contributions, which draw from her character's past to add texture to her performance."⁵⁷ *The Guardian* refers to her performance as "impressive" stating "It's a performance that could feel patronising but for the warmth with which Hawkins floods her character."⁵⁸

When asked about the success of *Maudie*, Alison Zimmer, Mongrel Media's theatrical sales co-ordinator said: "It's a story of a Canadian female artist, which is something we don't get the opportunity to see very often... There's a lot of pride."⁵⁹ Indeed, one of the film's producers said "When you find a story that really speaks to Atlantic Canada, Atlantic Canada loves to see those stories. [...] They're their stories, and they don't see them that much,"⁶⁰

Though the screenwriter splits her time between Ontario and Newfoundland and some of the producers were from Ontario, the film is linked only to Nova Scotia and Newfoundland in any news or reviews, particularly given the controversy around shooting the film in Newfoundland rather than Lewis' native Nova Scotia. One article even calls on the provenance of Ontario producer Leckie's mother (from Nova Scotia) in discussing the film.⁶¹ There is little to connect the film to Ontario culture or Ontario screenwriters, directors, and producers.

Maudie was produced for \$5.4 million with \$1.7 million spent in Ontario. An Economic Impact Study authored by the CMPA with the assistance of Telefilm demonstrated that for each dollar of OFTTC tax credit received by *Maudie*, it generated \$10.58 in economic output, \$7.12 in GDP and 9 full-time jobs per \$100,000 of incentive. 86 different businesses in Ontario benefitted from the production.⁶²

Mary Sexton, one of the Newfoundland producers, developed *Maudie* for ten years with Screen Door before it could go into production. "I worked on other people's projects to be able to pay (screenwriter) Sherry (White) to get this to fruition," Mary says, offering her six years on CBC's *Republic of Doyle* as an example.⁶³

⁵³ <https://www.halifaxexaminer.ca/province-house/epilogue-maudie-take-4/>

⁵⁴ <https://www.halifaxexaminer.ca/province-house/epilogue-maudie-take-4/>

⁵⁵ <http://playbackonline.ca/2017/12/20/top-grossing-films-of-2017/>

⁵⁶ <http://www.cbc.ca/news/canada/nova-scotia/maudie-atlantic-canada-s-hottest-movie-1.4088135>

⁵⁷ <http://variety.com/2016/film/reviews/maudie-review-sally-hawkins-1201851185/>

⁵⁸ <https://www.theguardian.com/film/2017/aug/06/maudie-review-sally-hawkins-maud-lewis>

⁵⁹ <http://www.cbc.ca/news/canada/nova-scotia/maudie-atlantic-canada-s-hottest-movie-1.4088135>

⁶⁰ <http://www.bbc.com/news/world-us-canada-39739754>

⁶¹ <https://www.halifaxexaminer.ca/province-house/epilogue-maudie-take-4/>

⁶² https://gallery.mailchimp.com/26f1366ec639a5eb1954790e1/files/62abbbf7-5425-4909-80d9-d56eb6a64a86/CMPA_Maudie_Economic_Impact_Study_Infographic.01.pdf

⁶³ <http://www.thewesternstar.com/living/st-johns-filmmaker-mary-sexton-on-maudie-the-new-hatching-matching-and-dispatching-movie-and-the-legacy-of-her-brother-tommy-3088/>

Mean Dreams

Mean Dreams (2016) is the second feature of Ontario director Nathan Morlando and first feature of screenwriters Ryan Grassby and Kevin Coughlin (both from Ontario). It stars Sophie Nélisse, Josh Wiggins, Bill Paxton and Colm Feore. The film follows two love-struck teenagers, Casey and Jonas, as the two go on the run after Jonas steals a bag of money from Casey's abusive police-officer father. *Mean Dreams* premiered at the Director's Fortnight at Cannes before playing at all of the major Canadian festivals. It was named as one of Canada's Top Ten films for 2016. The film is produced by William Woods of Woods Entertainment and Allison Black (Ontario), executive produced by Patrice Thérout (Ontario), Jonathan Bronfman (Ontario), Rob McGillivray (UK), Ben Stranahan (U.S.), Mark Gingras (Ontario), Andre Bharti (Ontario) and Tom Spriggs (U.S.). [It was financed by] Tip Top Productions, Project AMB, Vigilante Productions, Telefilm Canada, Northern Ontario Heritage Fund and Ontario Media Development"⁶⁴ with a low budget of \$2.2M CAD (\$1.8M USD).⁶⁵ The film, though set in anywhere United States, was shot in Sault Ste. Marie using the Northern Ontario Heritage Fund to partially finance the production.

Mean Dreams has an 80% fresh rating on Rotten Tomatoes. Though receiving poor reviews from *Variety*⁶⁶ and *The Hollywood Reporter*,⁶⁷ Andy Webster from *The New York Times* said: "Nathan Morlando's *Mean Dreams* may use a time-honored premise - young lovers on the lam (see: *Badlands*) - but it does so with such quiet, gently appealing assurance that it makes the template seem fresh again."⁶⁸ *Indiewire* said the film: "hails from the Terrence Malick playbook of alienated souls roaming about gorgeous natural scenery - specifically, it calls to mind *Badlands* - while adhering to a simpler set of dramatic circumstances, and hitting some agreeable notes in the process."⁶⁹

The film received significant publicity as it was one of the last film roles of Bill Paxton, who died in early 2017. The film was even discussed in *USA Today* and *People* magazine in the context of Paxton's death.⁷⁰ *Mean Dreams* was picked up by Vertical Entertainment for distribution in the United States⁷¹ and is distributed by Elevation Pictures in Canada.⁷²

⁶⁴ <https://variety.com/2015/film/news/bill-paxton-kevin-durand-mean-dreams-1201629631/>

⁶⁵ <https://icsfilm.org/reviews/cannes-2016-mean-dreams-nathan-morlando/>

⁶⁶ <http://variety.com/2016/film/reviews/mean-dreams-review-1201775104/>

⁶⁷ <https://www.hollywoodreporter.com/review/mean-dreams-cannes-review-894227>

⁶⁸ <https://www.nytimes.com/2017/03/16/movies/mean-dreams-review-bill-paxton.html>

⁶⁹ <http://www.indiewire.com/2016/05/cannes-review-bill-paxton-is-terrifying-in-terrence-malick-inspired-mean-dreams-290376/>

⁷⁰ <https://www.usatoday.com/story/life/movies/2017/03/14/bill-paxton-is-terrific-in-mean-dreams/99093166/> and <http://people.com/movies/bill-paxton-mean-dreams-final-films/>

⁷¹ <https://www.hollywoodreporter.com/news/toronto-vertical-entertainment-acquires-young-927102>

⁷² <http://playbackonline.ca/2016/05/13/labelle-acquires-morlandos-mean-dreams/>

Though the film is set in the United States, reviews about the film universally mention the Canadian scenery. *The Toronto Star* said: “there’s no mistaking the Northern Ontario landscapes where Nathan Morlando’s coming-of-age thriller *Mean Dreams* unfolds. It’s the magnificent wild of the Canadian Shield around Sault Ste. Marie, where the movie was filmed [...] The land is strong in this film, as it was last year in Andrew Cividino’s *Sleeping Giant*, set around Thunder Bay. And history also seems to be repeating itself in the rapturous greeting here for a new Canadian film and a fresh take on a familiar genre.”⁷³ Even the negative reviews of the film mention the landscape: “Despite its vague U.S. setting, this Canuck-shot production functions most flatteringly as an advertisement for the Ontario Film Commission, with the area’s fogged-mirror lakes and rusty fall foliage providing cinematographer Steve Cosens with his most postcard-ready shots.”⁷⁴

Analysis of the Case Studies:

Out of the three films listed here, *Mean Dreams* is the one that is most often described as an Ontario feature, most likely due to the use of the Ontario landscape passing as a no-name location for the film. *Maudie* and *Jean of the Joneses* are both stories rooted in another specific location (i.e. Nova Scotia and Brooklyn). Though each film can be classified as an Ontario feature for funding purposes and had varying levels of Ontario creative involvement, none of the films were promoted as ‘Ontarian.’ While the OMDC promoted the films to the industry under #ONcreates, mainstream media did not pick up that they were branded as Ontario features. No distinction was made about how these filmmakers might bring a specific viewpoint or vision to their filmmaking based on their residency.

What these case studies do provide is insight into how long it takes to bring a film to market (ten years in the case of *Maudie*) and how important it is to bring in partners from other jurisdictions for financing, talent and access to markets. Both *Maudie* and *Jean of the Joneses* leveraged the personalities behind the films to gain partners, financing and market interest prior to release. Funders felt comfortable taking a risk with first-time (and relatively untrained) director Meghie due to the very low budget and her familiarity with the subject matter as the screenwriter. As the *Mean Dreams* screenwriters had no previous film experience, it relied on the tenacity and connections of the producers and the profile of its director, Nathan Morlando (whose first feature was the critically acclaimed *Citizen Gangster*) for promotion. While *Maudie* had a mid-size budget and paid promotion, the two low budget films appear to have had little paid promotion and relied on word of mouth, social media and the personalities behind the production to get noticed. What remains unknown is to what extent audience response could have been increased with a more direct promotion of the films under an Ontario brand.

⁷³ <https://www.thestar.com/entertainment/2016/05/16/canadian-landscape-love-on-the-run-story-boost-mean-dreams-at-cannes.html>

⁷⁴ <http://variety.com/2016/film/reviews/mean-dreams-review-1201775104/>

Suggested Next Steps and Conclusion

The above research points to several opportunities where focused professional development by the feature film industry could assist Ontario filmmakers to further their careers and produce more successful feature films.

1. Formal and informal mentorship networks can be opened and developed for screenwriters, directors, and producers—especially those that are emerging and at mid-level career points.
2. Push for representation on screen and behind the camera of Ontario’s multicultural and diverse population. Funding and training programs including internship or job shadowing should target a wider diversity of stories and storytellers in a manner similar to those in place for gender parity and Indigenous representation. Any such programs should have accountability “check-ins” to make sure that the programs now existing or being put in place work to promote diverse content and diverse screenwriters, directors, and producers.
3. Training and guidance on new methods of distribution and self-distribution would help more filmmakers reach audiences and generate revenues.
4. Create on-going opportunities to continue the dialogue with screenwriters, directors and producers to monitor developments in the industry and work together to maintain currency between the rapidly evolving changes and challenges to ensure that the support mechanisms and practices keep pace.

Suggestions for the Future and Opportunities for Further Study

Some issues raised by this research were beyond its scope and could not be fully explored or are outside the control of the industry to implement directly but are included here as potential topics for future study.

1. Investigate how SVOD providers could promote Ontario feature films on their services, increase the number of Ontario feature films in their catalogues and provide cultural policy makers with data on audience and titles and what new financing models might look like.
2. Conduct a more thorough review of funding in other jurisdictions as set out in Appendix “D” including an update of FilmOntario’s *Lessons from Quebec* study, a particular review of some of the programs in Sweden including in particular how they are working on improving gender parity and mandating a turnover of decision-makers and a review of corporate or slate production funding programs. The review of other jurisdictions would also identify their steps in developing a distinct filmmaking brand and vision and how they may be adapted to the Ontario sector.
3. Explore how the industry could demonstrate benefits of a mandated turn-around of decision makers and industry stakeholders to promote experimentation, creativity and different points of view in who and what gets funded, as well as prioritize diversity in new hires to encourage decision makers who are more representative of the audience.
4. Develop a demographic study of the screenwriters, directors and producers to assist with measuring the growth of the diversity of the talent pool.

5. Identify any barriers in current funding structures and definitions relative to the changing definition of feature film and the various distribution methods used to reach audiences including specifically the need for a theatrical release and distributor.
6. Identify any gaps in funding for mid-career filmmaking and consider how to bridge such a gap between emerging and experienced filmmakers and diversify the talent pool.
7. Explore ways to increase funding for development to provide more opportunities for screenwriters to develop their craft as well as ensure that the best possible script goes into production and necessary non-writing development activities such as location scouting, budgeting and packaging can be undertaken.
8. The sector should also explore how to increase funding for production and for co-production to ensure the sustained career development of filmmakers and the feature film sector in Ontario
9. Explore the development of an Ontario brand to promote feature film to media and the public followed by assessment of its impact on audience response to the films.

Conclusion

Can Ontario sustain a feature film industry? Despite a universal love for the art form, more than a few of the interview subjects and survey participants were fatalistic about the industry's chances in Ontario and in Canada. As one survey participant put it:

Features in Canada are considered art, not entertainment and as such can only be created by wealthy, self-sustaining artists. The features I have worked on have all been personal projects - huge labours of love. It sucks, because I love features and the artistry involved in them, but I don't feel like it's in any way practical to create them in Canada.

However, many more of the participants in the research were optimistic and offered suggestions as set out above for how to ensure the sustainability and success of Ontario's feature film sector. It is hoped that the voices in this report, and the data that provides context for their perspectives, will provide the reader with a better understanding of the challenges, opportunities and potential strategies to support and improve the Ontario feature film sector. A simple solution would be to increase funding for the development and production of feature film in Ontario as that would provide screenwriters, directors and producers with more work to allow them to enhance their skills, time and money to craft the best possible scripts, and the budget to produce commercially competitive feature films. However, as this report demonstrates, there are other strategies which would work hand in hand with additional funding such as training in new technologies, targeted training to expand the talent pool and formal networking to help emerging talent develop their careers.

The Ontario feature film sector produces audience-pleasing and award-winning feature films but with more support could develop a sustainable industry and a brand so that film audiences around the world would recognize the quality and creativity of an Ontario feature film.

Appendix A Steering Committee and Researchers



Producers Roundtable of Ontario (PRO) – We are small business operators in Ontario with the primary focus on developing, financing, producing and marketing feature films (fiction and non-fiction) for the Canadian and International marketplaces. We own the Intellectual Property (IP) of our films which we produce and license for sale in Canada and the world over; revenue flows back to Ontario. We take financial and creative risks in our companies to generate this IP and we create and support a vast range and number of industrial and cultural jobs in the province. We develop and export the work of Ontario creative talent (including directors and writers) internationally, engage in international co-production ventures with partners around the world and sell our films for theatrical, broadcast and digital exploitation in a global marketplace. You can view some of our members' award-winning work here: <https://vimeo.com/246170868/160a3f72de>

Paul Barkin has been actively producing feature films through his company Alcina Pictures since 1997. An award winning producer and champion of director driven and first time filmmakers, Paul has produced an array of critically acclaimed and commercially successful films for the last 20 years. Selected credits include Cherien Dabis' Sundance and Cannes entry *Amreeka*, nominated for three Independent Spirit Awards including Best Picture, Bruce McDonald's multi-faceted, award-winning *The Tracey Fragments*, Su Rynard's Alfred P. Sloan Prize winner *Kardia*, Jeff Renfro's ice-age apocalypse *The Colony* starring Laurence Fishburne and Bill Paxton, Nordic revenge thriller *Hevn* by Kjersti Steinsbø, and most recently *Firecrackers*, Jasmin Mozafarri's breakout feature debut.

Karen Franklin's career in the Canadian film industry began in the mid 80's as a theatrical booker for Cineplex Odeon. She progressed through the ranks of Telefilm Canada over a 17-year tenure eventually managing significant program and administrative budgets. Karen is now an independent feature film producer. Her company, Hill 100 Productions, made and distributes the acclaimed lost-at-sea feature film *The Disappeared* and has a number of films currently in development. Karen is a member of the CMPA, PRO and the ACCT. In addition to her film career, Karen is involved in a couple entrepreneurial family businesses including real estate management and career services. She holds a BSc and MBA from the University of Toronto.

Ralph Holt left Telefilm Canada in 2008 to start up Hill100 and has produced the acclaimed lost-at-sea feature film *The Disappeared*. While at Telefilm, Ralph green-lit the financing of, and oversaw its interest in some outstanding domestic and internationally successful feature films including *The Hanging Garden*, *Rare Birds*, *Trailer Park Boys The Movie*, *Bon Cop*, *Bad Cop*, *Shake Hands with the Devil* and *Away From Her*. Ralph is a member of the CMPA, PRO and the ACCT.

Anna Stratton is a producer and President of Triptych Media, known for its award-winning film and television productions, including *The Girl King*, *High Life*, *Emotional Arithmetic*, *Lilies*, *Falling Angels*, *The Republic of Love*, *The Bay of Love and Sorrows*, *The Hanging Garden*, *Zero Patience*, *Lucky Girl*, *As Slow as Possible*, *The Tale of Teeka*, *Heyday!* and *Love Letters*. A graduate of the Canadian Film Centre, Anna also worked in theatre and dance and was Head of English Language Theatre for the Canada Council for the Arts. She has served on many boards and committees in the arts and cultural industries.



Directors Guild of Canada (DGC) – The Directors Guild of Canada (DGC) is a national labour organization that represents key creative and logistical professionals in the film, television and digital media industries. It was created in 1962 as an association of Canada’s film and television directors. Today, it has approximately 5,000 members drawn from 47 different craft and occupational categories, covering all areas of direction, design, production and editing. The Directors Guild of Canada also represents The Directors Rights Collective of Canada (DRCC), a non-profit corporation established in 1998 by the DGC with a mandate to collect and distribute royalties to audiovisual Directors.

Dave Forget has been working in the film and television industry in Canada for nearly 40 years and is currently the National Executive Director of the DGC. He served at the DGC for three years as Director of Policy following a 14-year career with Telefilm Canada where he held various management roles, including Director, Business Affairs and Certification. Prior to working at Telefilm, Dave worked for over 20 years in a range of management and sales positions in film distribution, including at Red Sky Entertainment, 20th Century Fox and Alliance Atlantis Releasing.



The Writers Guild of Canada (WGC) is a professional association of more than 2,200 English-language screenwriters. WGC members are the creative force behind Canada’s successful TV shows, movies, and webseries, and their work brings the diversity of Canadian life and culture to the world’s screens. The WGC supports Canadian screenwriters through negotiating and administering collective agreements with independent producers and broadcasters to ensure that screenwriters earn fair pay and benefits, and advocates for policies that foster Canadian programming and production. The WGC is also an essential professional hub for screenwriters, bringing them together as a community, and boosting their profile in the industry and beyond. For more information, visit www.wgc.ca or on Twitter, @WGCTweet.

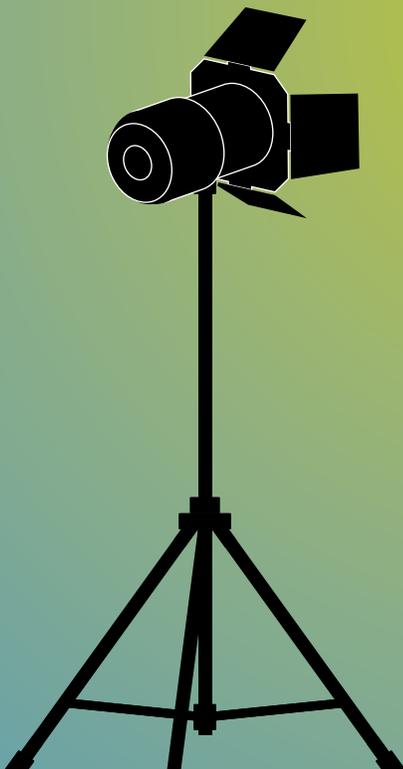
Laurie Channer is the Director of Industrial Relations at the Writers Guild of Canada, and has been a key member of the WGC’s bargaining team for all of the WGC’s collective agreements since 2000. A BFA graduate of York University’s Film program, she previously worked at the National Film Board of Canada.

Ryerson University – Ryerson is a Toronto-based university offering over 100 undergraduate and graduate programs, including Film Studies.

Jessica Thom (BFAh, MA, PhD) is an instructor at Ryerson University. She has a PhD in Media Studies from the University of Western Ontario. Jessica's main focus of study is on the audiences and makers of media content, primarily film and/or news.

James Warrack (BFA, BAA, MA) is a faculty member in the Film Program of the School of Image Arts, and academic coordinator for the Film Studies program and the Summer Film School in the Chang School, Ryerson University. James has undertaken a wide scope of studies and has a breadth of professional experience in visual arts, film and television production. Experience in the film and television industry encompasses commercials, feature films, broadcast television and new media production. His experience includes all key creative positions in screen-based media. James has focused his research and teaching for over a decade and a half on a variety of aspects of the film and television industry in Ontario. His focus includes higher education in animation, visual effects, digital technology, and the business of film.

Kelly Lynne Ashton has been working in the Canadian film, television and digital media industries for over thirty years. She has worked as a business affairs executive in several Toronto film and television production and distribution companies. She has worked in government relations and media policy as Director of Policy at the Writers Guild of Canada. Kelly Lynne is currently providing consulting services to clients in all areas of the industry. She has written research reports on a number of topics including international co-production for digital media, diversity and inclusion in the digital media sector and the role that production service work plays in the Canadian industry.



Appendix B

Interviewees

Cameron Bailey worked as a Festival programmer for 11 years before assuming his current role (as Artistic Director and Co-Head) of the Toronto International Film Festival (TIFF). In addition, he has programmed and hosted TIFF's highly successful subscription series "Reel Talk," and headed TIFF's "Perspective Canada" series. Prior to joining TIFF, Bailey curated films for Cinematheque Ontario, The National Gallery of Canada, The National Film Board of Canada, and Australia's Sydney International Film Festival." (From his "Speaker's Spotlight" profile)

Paul Barkin has been actively producing feature films through his company Alcina Pictures since 1997. An award winning producer and champion of director driven and first time filmmakers, Paul has produced an array of critically acclaimed and commercially successful films for the last 20 years. Selected credits include Cherien Dabis' Sundance and Cannes entry *Amreeka*, nominated for three Independent Spirit Awards including Best Picture, Bruce McDonald's multi-faceted, award-winning *The Tracey Fragments*, Su Rynard's Alfred P. Sloan Prize winner *Kardia*, Jeff Renfroe's ice-age apocalypse *The Colony* starring Laurence Fishburne and Bill Paxton, Nordic revenge thriller *Hevn* by Kjersti Steinsbø, and most recently *Firecrackers*, Jasmin Mozafarri's breakout feature debut.

Leila Basen is a writer/producer working in feature films and television. Co- writer of the feature film *Bon Cop/Bad Cop*, she has written countless episodes of shows such as *Street Legal*, *Road to Avonlea*, *Max Glick*, *Ready or Not* and *Bliss*. Her credits as a writer/producer include *Emily Of New Moon*, *Blackfly*, *Tales of The Neverending Story*, *Mental Block*, *Strange Empire* and eight seasons of the hit CBC family drama *Heartland*. Currently Leila is the executive producer/ showrunner of *Big Top Academy* in collaboration with Discovery and Cirque du Soleil.

Allison Black is the producer of several award winning films. Her latest film, Keith Behrman's *Giant Little Ones*, will premiere as a TIFF 2018 Special Presentation. Previously, she produced the Cannes Director's Fortnight selection *Mean Dreams* by award winning director Nathan Morlando which drew international acclaim and was named one of Canada's Top Ten films of 2016. Her first feature, Nathan Morlando's true-crime drama *Citizen Gangtser* (IFC Films), won the Best Canadian First Feature Award at TIFF, garnered several CSA nominations, and was named one of Canada's Top Ten films of the year.

Gavin Michael Booth is a writer, director and producer of five feature films including the NBC Universal thriller *The Scarehouse* and the world's first live broadcast film, *Fifteen*, in partnership with producer Jason Blum. Gavin has directed over one hundred music videos, including several for multi-platinum artists *Third Eye Blind* and the number one country video for Canadian artist *Tim Hicks*.

Jonathan Bronfman is a Toronto-based film producer and entrepreneur. He is the founder of JoBro Productions, a company that specializes in structuring, financing and producing domestic and international co-productions. His recent work includes *Patti Cake\$*, *The Witch*, *Race*, *Two Lovers and a Bear*, *The Void*, *Mean Dreams*, *Stockholm* and *The New Romantic*. *Run This Town*, *Heavy* and *James Vs. His Future Self* are in post production.

Ian Carpenter is a screenwriter/producer. TV credits include: *Frankie Drake, Being Erica, 11 Cameras, Wild Roses, Blackstone: Played. The LA Complex, The Best Years, Outlaw Bikers, Regensis*. Features: *Brace for Impact and Sometimes the Good Kill*. Before working in TV Ian wrote and directed theatre. He has a Ph.D. in Film from the University of Toronto and a zine play in the permanent collections of the Museum of Modern Art and the Brooklyn Museum.

Andrew Cividino is an award-winning director hailing from Toronto, Canada. After graduating from Ryerson University's prestigious Film Studies program, he continued honing his craft directing short films, garnering international acclaim. His first feature, *Sleeping Giant* went on to win over a dozen awards, including Best First Feature Film at the 2015 Toronto International Film Festival. Andrew was recently named TIFF's Artist in Residence and is participating in the prestigious FilmTwo Program at the Sundance Institute, as well as directing for the latest season of CBC/POP's *Schitt's Creek*. He is currently developing an adaptation of Nicolas Billon's *Furies* for Rhombus Media, and Yann Martel's *We Ate the Children Last* with Bell Media and his production company, Film Forge. *From andrewcividino.com/about*

Wayne Clarkson has headed some of Canada's most respected film, television and new media institutions over the course of his career. In 1978 he was appointed Director of the Festival of Festivals which later became the Toronto International Film Festival. In 1986 he departed the Festival to serve as the founding Chair and CEO of the Ontario Film Development Corporation, now the Ontario Media Development Corporation, and under his stewardship the OFDC played an integral and essential role in the development and production of quality Ontario film and television productions. He departed the OFDC in the spring of 1991 to serve as the Executive Director of the Canadian Film Centre, Canada's pre-eminent training facility for emerging talent in the film, television and new media industries. In January of 2005 he accepted a five year appointment by the Government of Canada to serve as the Executive Director of Telefilm Canada. Mr. Clarkson has received numerous awards including the Clyde Gilmour Lifetime Achievement Award from the Toronto Film Critics Association; Friend of Women in Film and Television Award, and the Toronto Arts Award for his contribution to Canadian cinema. He has also served on numerous Boards and advisory groups including the Federal Task Force for Feature Film Policy. He presently serves as a member of the Rogers Documentary and Cable Network Fund Board of Directors.

Michael Dobbin's Ottawa-based company, Quiet Revolution Pictures maintains a focus on theatrical motion pictures for international audiences. His partner UK company, Peardrop Productions, focuses on UK and EU based production. Michael began his career in Toronto and then London, England, where he started in professional screen training and was mentored by veteran producer Leslee Udwin. Since then, he has established himself as seasoned producer and content creator on both sides of the Atlantic. He's an award-winning writer and director and is an alumnus of the film programme of Ryerson University. In 2010, Michael founded the 'Just Watch Me!' Berlin Screening room with the Canadian Embassy, and is regularly sought after as a story editor, script doctor, mentor and lecturer.

Atom Egoyan is one of the most celebrated contemporary filmmakers on the international scene. His body of work — which includes television, theatre, music, opera and art installations — delves into issues of memory, displacement, and the impact of technology on media and modern life.

Niv Fichman is one of the founding partners of Rhombus Media in Toronto. The company's 38-year history has yielded a rich compilation of feature films, documentaries, performing art films and series television. Niv's most recent projects include: Patricia Rozema's *Into The Forest* (starring Ellen Page and Evan Rachel Wood), Paul Gross's *Hyena Road*, and Stephen Dunn's first feature, *Closet Monster* which came away with the award for Best Canadian Feature at the Toronto International Film Festival in 2016. Niv's latest feature film was *The Man Who Invented Christmas*, which premiered late in 2017.

John Galway is an MBA graduate with twenty-five years of experience in film and television. John's career has ranged from film festivals, to production and financing. In 2005, he joined The Harold Greenberg Fund as President and Board Member. At the Fund, he has overseen investments of more than \$30 Million and has helped develop over 1000 feature film and television projects. He is also the co-founder of the Toronto Irish Film Festival and a board member of the Irish Canadian Chamber of Commerce. He sits on various industry boards, juries and advisory committees. Twitter: @greycountymedia

Sturla Gunnarsson was born in Iceland, lives in Toronto and makes films all over the world. His feature films, documentaries and television dramas have won international acclaim, including an Emmy Award, Prix Italia, multiple Canadian Academy Awards and an Oscar nomination. Recent television work includes Bravo's critically acclaimed *19-2* and the CBC/Netflix comedy *Schitt's Creek*. Gunnarsson's last film, *Monsoon*, was selected as one of the TIFF Top Ten Canadian Films, and won the Audience Award. Previous TIFF-launched films include *Force of Nature* (People's Choice Doc Award winner) *Beowulf & Grendel* (Gerard Butler, Stellan Skarsgard), *Rare Birds* (William Hurt, Molly Parker) and *Such A Long Journey* (Roshan Seth, Om Puri). Gunnarsson is currently directing the pilot for CBC's reboot of *Streetlegal*, and is developing a six-hour adaptation of Wade Davis' epic masterpiece, *Into The Silence: The Great War, Mallory, and the Conquest of Everest*. Gunnarsson is the Past President of the Directors Guild of Canada.

Gail Harvey is an award-winning television and film director whose latest feature film, the thriller *Never Saw it Coming*, starring Emily Hampshire and Eric Roberts, was written by world famous author Linwood Barclay, based on his novel. It was recently nominated for Best World Showcase Feature Film at the Soho International Film Festival in New York. Her documentary film about musician Rickie Lee Jones, entitled *The Other Side of Desire* premiered at the Raindance Film Festival in London, England in September 2016. Harvey's feature film *Looking is the Original Sin* won best international feature at the New York International Film Festival, screened in London, England at the Raindance Film Festival and at the Female Eye Film Festival where Gail was awarded the Female Eye Honourary Director, Best in the Biz award for 2014. She is currently directing the new Netflix/CBC show *Northern Rescue*, starring Billy Baldwin, and has directed television shows *Private Eyes*, *Dark Matter*, *Heartland*, *Lost Girl*, *Republic of Doyle*, *Murdoch Mysteries*, as well as directing all the episodes of the HBO series *The Line*, and two movies for Lifetime Network, *Four Extraordinary Women* starring Lindsay Wagner, and *Home by Christmas*, starring Linda Hamilton.

Mars Horodoyski is a Canadian Comedy Award-winning director whose series credits include *Mr.D (CBC)*, *Holly Hobbie (Hulu)*, the Emmy Award winning series *Odd Squad (PBS)*, *Dino Dana (Amazon)*, *Star Falls (Nickelodeon)* and *The Next Step (Family/Hulu)*. Most recently she was nominated for a Canadian Screen Award for her work on CBC's *This Hour Has 22 Minutes*. Her feature film *Ben's at Home* was released theatrically in Canada and is currently airing on Netflix. Mars is an alumnus of the CFC directing program, the recipient of the Norman Jewison Director Award and the Youth Media Alliance Emerging Director Award.

Jennifer Jonas has been working as an award-winning producer since 1994. Her latest feature, *Born to Be Blue* starring Ethan Hawke, Carmen Ejogo and Callum Keith Rennie was released by eOne and IFC in 2016 to glowing reviews. Jennifer won TIFF/CMPA's producer of the year in 2013. She has produced such films as Bruce LaBruce's *Gerontophilia*, which premiered at the Venice Film Festival and TIFF 2013 and won Best Canadian Feature at Montreal's 2013 Festival du nouveau cinema; Jerry Ciccorriti's feature, *The Resurrection of Tony Gitone* (2012); *I'm Yours* by Leonard Farlinger starring Rossif Sutherland and Karine Vanasse which premiered at the Toronto International Film Festival 2011; and Bruce McDonald's *Trigger* (2010) selected as one of the Toronto International Films Festival's Top Ten films for 2010.

Jennifer Kawaja, under the Sienna Films banner with partner, Julia Sereny, is Executive Producer of *Cardinal* (CTV/Bell Media), the highest rated new Canadian production of the 2016/2017 season. Jennifer also executive produces *Ransom* for eOne, CBS and Global Television. Additionally, Sienna Films has produced feature films including *I, Claudia*, *New Waterford Girl*, *Marion Bridge*, *Saint Monica*, *Touch of Pink*, and *How She Move*, as well as several acclaimed television projects, such as Gemini award-winning *One Dead Indian* (Bell Media) and *Combat Hospital* (Global/ABC/Sony). Previously, Jennifer produced, wrote and directed various award-winning documentaries and short dramas, distributed and broadcast both nationally and internationally.

Martin Katz is Founder and President of Prospero Pictures. One of the most prolific feature film producers in Canada, Katz's credits include *Hotel Rwanda*, which was nominated for three Academy Awards and three Golden Globe Awards, and a decade-long collaboration with celebrated director David Cronenberg, comprising *Maps to the Stars*, *A Dangerous Method*, *Cosmopolis*, and *Spider*. Katz has produced two films with Bronwen Hughes, *The Journey is the Destination* and *Stander*. Katz's television productions include *Spectacle: Elvis Costello With...* an Award-winning series co-produced with Rocket Pictures and *Ice Road Truckers*. Katz is Chair of the Academy of Canadian Cinema and Television.

Rob King writes and directs feature films, television dramas and documentaries. His selected credits include George Ryga's *Hungry Hills* (TIFF 2009), The International Emmy nominated *Tokyo Trial* (Netflix, January 2016), *The Humanity Bureau* (Release September, 2017), and *Distorted* (Release date June, 2018). Rob also has two dramatic television mini-series in development, with CBC and Bell Media.

Jeremy LaLonde is a writer and director of five feature films including *How to Plan an Orgy in a Small Town*, and the soon to-be-released *The Go-Getters*. He recently finished production on his fifth feature *James Vs His Future Self* starring Daniel Stern, Frances Conroy, and Cleopatra Coleman. His work has screened internationally at such festivals as TIFF, Slamdance, and Whistler. He directed the upcoming season three of *Baroness Von Sketch Show* which airs on CBC and IFC from which he previously won multiple CSAs. He will be the inaugural director of CBC's new comedy *Cavendish* set to air in 2019.

Jason Lapeyre is a writer/director working in both film and television. His first film, *Cold Blooded*, won Best Canadian Film at Fantasia, and his second, *I Declare War*, played TIFF, won the Audience Award at Fantastic Fest, and was released theatrically by DraftHouse Films. His next feature is an adaptation of Philip K. Dick's *The Crawlers*. He is represented in the US by APA and in Canada by Vanguard Artists.

Mehernaz Lentin, as an independent producer with twenty years of experience, has worked with some of Canada's leading filmmakers bringing award winning, innovative dramas and documentary films to markets in Canada and around-the-world. Her focus is to collaborate with filmmakers who think outside of the box to develop and produce socially relevant, character driven stories that are universal in appeal, across all platforms. In November 2017 Mehernaz joined the CBC as Senior Director of the Breaking Barriers Film Fund and Feature Film Pre-Licenses.

Kathleen Meek is Manager, Original Content, Drama and Factual for Corus Entertainment where she is responsible for a portfolio of original scripted and factual series for Global, History Canada, Showcase and W. She is also production executive on History's #1 drama, *Vikings*. She recently joined Corus from Bell Media where she was Production Executive, Drama and Feature Film. She was also responsible for the pre-licensing of Canadian feature film for Bell Media's pay TV services, The Movie Network and HBO Canada. Prior to joining Bell Media, she was the Manager of Original Programming for Astral's pay TV movie services. Kathleen started her career at CTV in the drama department where she worked as a production executive on *Degrassi: The Next Generation*. She has also sat on the board of the imagineNATIVE Film + Media Arts Festival and the advisory committee for Strategic Partners.

Aeschylus Poulos launched Hawkeye Pictures with Andrew Cividino's *Sleeping Giant* which had its world premiere at Semaine de la Critique du Festival de Cannes 2015 and has gone on to win numerous international and domestic awards including Best Canadian First Feature at TIFF 2015. Prior to Hawkeye Aeschylus co-produced Ruba Nadda's thriller *Inescapable* starring Academy Award winner Marisa Tomei, and Kate Melville's acclaimed *Picture Day*, starring Sundance award winner Tatiana Maslany; the mini-series *The Book of Negroes* and the thriller *October Gale*, starring Patricia Clarkson. Aeschylus actively forges relationships with domestic and international partners, broadcasters and distributors.

Patricia Rozema is an Emmy award-winning director, screenwriter, and producer. Her debut feature *I've Heard the Mermaids Singing* (1987) won the Prix de la Jeunesse at Cannes. Her films include *When Night is Falling* (1995), *Mansfield Park* (1999), *Grey Gardens* (2009), and *Into the Forest* (2015). She was recently invited to become a member of the Academy of Motion Picture Arts and Sciences, and she recently co-produced, directed and co-wrote, *Mouthpiece* which has been invited to Open the Special Presentations section of the Toronto International Film Festival 2018.

Albert Shin is a Korean-Canadian writer, director and producer of two feature films including *In Her Place*, which was nominated for 7 Canadian Screen Awards, including Best Director and Best Picture. He is the recipient of the Jay Scott Prize for Emerging Filmmaker by the Toronto Film Critics Association and is currently developing his next feature, *Clifton Hill*, a mystery set in Niagara Falls with award-winning production company, Rhombus Media.

Mark Slone, President, SloneSoup Inc. is a communications and marketing professional with extensive expertise in Canadian and international motion picture distribution, marketing, publicity, finance and associated cultural policy. A graduate of Montreal's McGill University, Slone started his career promoting Hollywood movies on campus for Warner Bros. He has since held executive positions in Canadian movie distribution including, most recently, oversight of all theatrical distribution activities for Canada's largest movie distributor. He currently operates the communications and IP development company SloneSoup. He is a Past President of the Canadian Association of Film Distributors and Exporters; serves as a Board Director for several non-profit film organizations, including The Academy of Canadian Cinema and Television; is a regular commentator and writer on the business of film; and provides mentorship to emerging filmmakers. Slone lives in Toronto with his family.

Warren P. Sonoda is one of Canada's busiest, in-demand and prolific filmmakers having completed his 10th feature film, 54th episode of TV and over 160 music videos. He's the youngest director to be elected as the DGC National Directors Division Chair, Chairs the Board of Directors of the Canadian Film Fest, received a Queen's Jubilee Medal and a 2017 Emmy Nomination for the PBS series *Odd Squad*.

Tim Southam's work spans the spectrum from impressionistic performing arts films like Grammy-nominated *Satie and Suzanne*, *Love Letters*, *Inner Voices* and *The Tale of Teeka*, through critically acclaimed biographical documentaries like *Drowning in Dreams* and *Perreault Dancer*, *Trudeau: Maverick in the Making* and *Brent Carver: Home Through the Night*, to award-winning naturalistic dramas like *One Dead Indian* and *The Bay of Love and Sorrows*. He has also worked as director on hit series like *House*, *Bones*, *Animal Kingdom*, *Hell on Wheels*, *Lost in Space*, and as producing-director on *Bates Motel* and *Colony*. He has served two terms as President of the Directors Guild of Canada.

Jane Tattersall is Senior Vice President of Post for SIM, Toronto. A graduate of Queens University (Philosophy), Jane's first job in film was as a researcher/writer on a BBC/TVO documentary series. She founded Tattersall Sound in the early 90's. Ask Jane about her success over 30 years and she attributes it to her luck of being mentored by some of the best sound editors and mixers in the business. Great filmmakers such as Jaco van Dormael, Bill Forsyth, Deepa Mehta, David Cronenberg, and Istvan Szabo contributed to her education. She built relationships with young Canadian filmmakers at the start of their careers including Clement Virgo, Sarah Polley, Richie Mehta, Mike McGowan. Jane's passion for sound excellence and hard work helped this next generation of filmmakers take the stage at the Oscars, at Cannes, in Toronto and at film festivals around the world. Jane's work has taken her beyond Canada, including stints in Berlin, Brussels, Budapest, London, LA, Skywalker, and New York. Numerous credits, nominations and awards followed and today Jane counts over 170 credits (film and television), and over 100 nominations and awards. Recent credits include *The Handmaid's Tale*, *Alias Grace*, *Cardinal* and *The Man Who Invented Christmas*.

Kate Taylor is a novelist, cultural critic and long-time staffer at the *Globe and Mail* where she writes about film and the arts. She is the author of three award-winning novels, including *Serial Monogamy*, newly released in paperback

Karen Thorne-Stone is the President and CEO of the Ontario Media Development Corporation, a provincial agency which supports economic development, growth and investment in Ontario's cultural media industries including: film and television, interactive digital media, music, book and magazine publishing. Previously Karen served in a variety of senior management positions with the City of Toronto, including Film Commissioner and Executive Director of Economic Development.

Adam Till is a writer/producer based in Toronto, Canada. He created, co-executive produced, and wrote the bulk of the episodes for the series *Billable Hours*, which ran on Showcase/Global from 2005-2009, winning the Gemini Award for Best Writing in a Comedy series in its final season. Adam has written films starring Rob Lowe, Mira Sorvino and Abigail Breslin, and won the Canadian Comedy Award for Film Writing in 2006 for his film *Leo*. Adam is currently in development with 20th Century Fox/Fox TV on a new sitcom entitled *Meds*, being produced by Andrew Barnsley/Project 10 (*Schitt's Creek*, *Spun Out*).

Nadine Valcin is an award-winning bilingual Canadian filmmaker. Her productions include the documentaries *Black, Bold and Beautiful* and *Une école sans frontières* and the NSI Drama Prize-winning short, *In Between*. She is currently developing three feature film projects - *La Switch* and *Ici et ailleurs* (in French) and *In our Midst* (in English) as well as the virtual reality experience *Ghosts of Memory* with funding from the experimental stream of the Canada Media Fund and the OMDC.

James Weyman is President of media production and consulting company Barn 12 Inc. A 35-year veteran of the screen-based industries, James was most recently at the Ontario Media Development Corporation where he managed a \$20 million portfolio of programs across six creative industries. As a producer and filmmaker, James has been involved in a range of critically acclaimed productions. As an executive, James has participated in financing hundreds of film and TV productions across 3 decades of filmmaking talent, supported countless careers, and contributed substantially to the growth of the independent Canadian film and TV industry.

Appendix C

Further Data

Footnote 3 – Fig. 3 Domestic and Foreign Feature Film Production in Ontario

Year ending Dec. 31:	2017		2016		2015		2014		2013	
	# of projects	Production \$ left in Ontario	# of projects	Production \$ left in Ontario	# of projects	Production \$ left in Ontario	# of projects	Production \$ left in Ontario	# of projects	Production \$ left in Ontario
	Production \$ = millions of dollars									
Domestic Feature Film	38	80.6	27	69.7	27	57.1	43	105.7	29	134.1
Foreign Feature Film	23	121.9	23	242.4	28	209.1	15	139.3	15	97.7
Total	61	202.5	50	312.1	55	266.2	58	245.0	44	231.8

Source: OMDC Production Statistics -http://www.omdc.on.ca/film_and_tv/research_and_industry_information/Production_Statistics.htm Retrieved April 3, 2018

Footnote 4 – Fig. 4 Volume of Canadian theatrical feature film production

Exhibit 5 - 8 Volume of Canadian theatrical feature film production, by province and territory

(\$ millions)	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2016/17 share of total
Quebec	121	130	229	127	136	145	178	203	111	150	47%
British Columbia	65	53	25	41	8	37	18	55	41	79	25%
Ontario	109	46	91	121	176	173	131	122	112	66	21%
Manitoba	5	0	1	14	10	7	0	3	5	11	3%
Saskatchewan	11	15	3	11	7	4	15	0	0	7	2%
Alberta	9	0	3	2	0	1	3	4	5	4	1%
Nova Scotia	3	10	9	11	2	8	2	0	3	1	<1%
Newfoundland and Labrador	1	2	0	0	1	2	3	0	2	0	0%
Territories*	0	0	0	0	0	0	0	0	0	0	0%
New Brunswick	0	3	1	0	0	1	2	0	0	0	0%
Prince Edward Island	0	0	0	0	0	0	0	0	0	0	0%
Total	323	260	363	326	340	379	352	388	280	318	100%

Source: Estimates based on data collected from CAVCO.

Note: Statistics published by provincial funding agencies may differ from those in *Profile 2017*. Please see Notes on Methodology for additional information. Some totals may not sum due to rounding.

Source: CMPA Profile 2017, pg. 63

Footnote 5 – Fig. 5 Financing of Canadian theatrical feature film production

Exhibit 5 - 11 Financing of Canadian theatrical feature film production

	2012/13		2013/14		2014/15		2015/16		2016/17	
	\$ millions	%								
Private broadcaster licence fees	3	1%	3	1%	3	1%	1	<1%	1	<1%
Public broadcaster licence fees	2	<1%	1	<1%	1	<1%	4	1%	2	1%
Federal tax credit ¹	24	6%	28	8%	26	7%	18	7%	23	7%
Provincial tax credits ¹	76	20%	68	19%	80	21%	59	21%	65	20%
Canadian distributors	36	9%	33	9%	37	9%	39	14%	44	14%
Foreign ²	78	21%	99	28%	76	20%	29	10%	16	5%
Telefilm Canada	66	17%	60	17%	58	15%	54	19%	69	22%
Other public ³	51	13%	20	6%	60	15%	26	9%	35	11%
Other private ⁴	43	11%	40	11%	48	12%	50	18%	62	20%
Total	379	100%	352	100%	388	100%	280	100%	318	100%

Source: Estimates based on data obtained from CAVCO and Telefilm Canada.

Note: Some totals may not sum due to rounding.

1. Canadian production companies receive federal and provincial tax credits based on their eligible labour expenditures, and, in almost all cases, invest their tax credits directly into their film and television projects, in order to complete their project financing.
2. Includes private and public financing from outside Canada.
3. Other public includes financing from provincial governments, and other federal government departments and agencies.
4. Other private includes financing from production companies (excluding the tax credit contribution), independent production funds, broadcaster equity and other Canadian private investors.

Source: CMPA Profile 2017, pg. 66

Note that 'Other private' includes independent funds such as The Harold Greenberg Fund, deferring or investing producer fees provided for in the production budget and private investors. For Ontario feature films 'Other public' would include the OMDC's Feature Film Fund and the Northern Ontario Heritage Fund.

Footnote 6 – Fig. 6 GDP and Labour Income Impact Film and Television in Canada

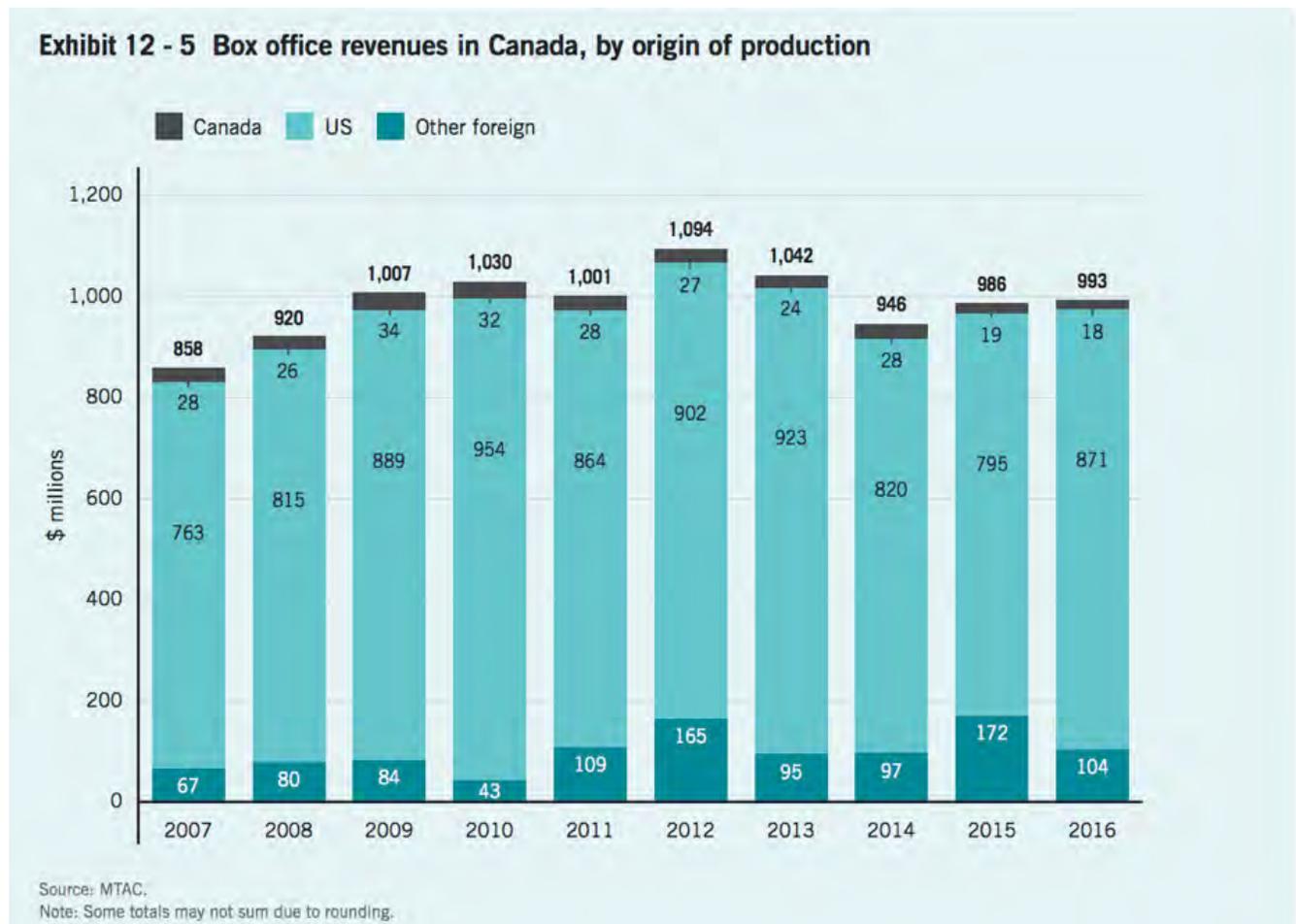
Exhibit 2 - 4 GDP and labour income impact film and television production in Canada, 2016/17

	Direct	Spin-off	Total
LABOUR INCOME (\$ MILLIONS)			
Canadian content production			
Canadian television production	1,493	1,807	3,300
Canadian theatrical feature film production	159	195	354
Subtotal	1,652	2,002	3,654
FLS production	1,766	2,274	4,040
Broadcaster in-house production	658	799	1,457
Grand total	4,076	5,075	9,151
GDP (\$ MILLIONS)			
Canadian content production			
Canadian television production	1,553	2,692	4,245
Canadian theatrical feature film production	165	290	455
Subtotal	1,718	2,982	4,700
FLS production	1,841	3,593	5,434
Broadcaster in-house production	684	1,190	1,874
Grand total	4,243	7,765	12,008

Source: CMPA Profile 2017 , pg. 25

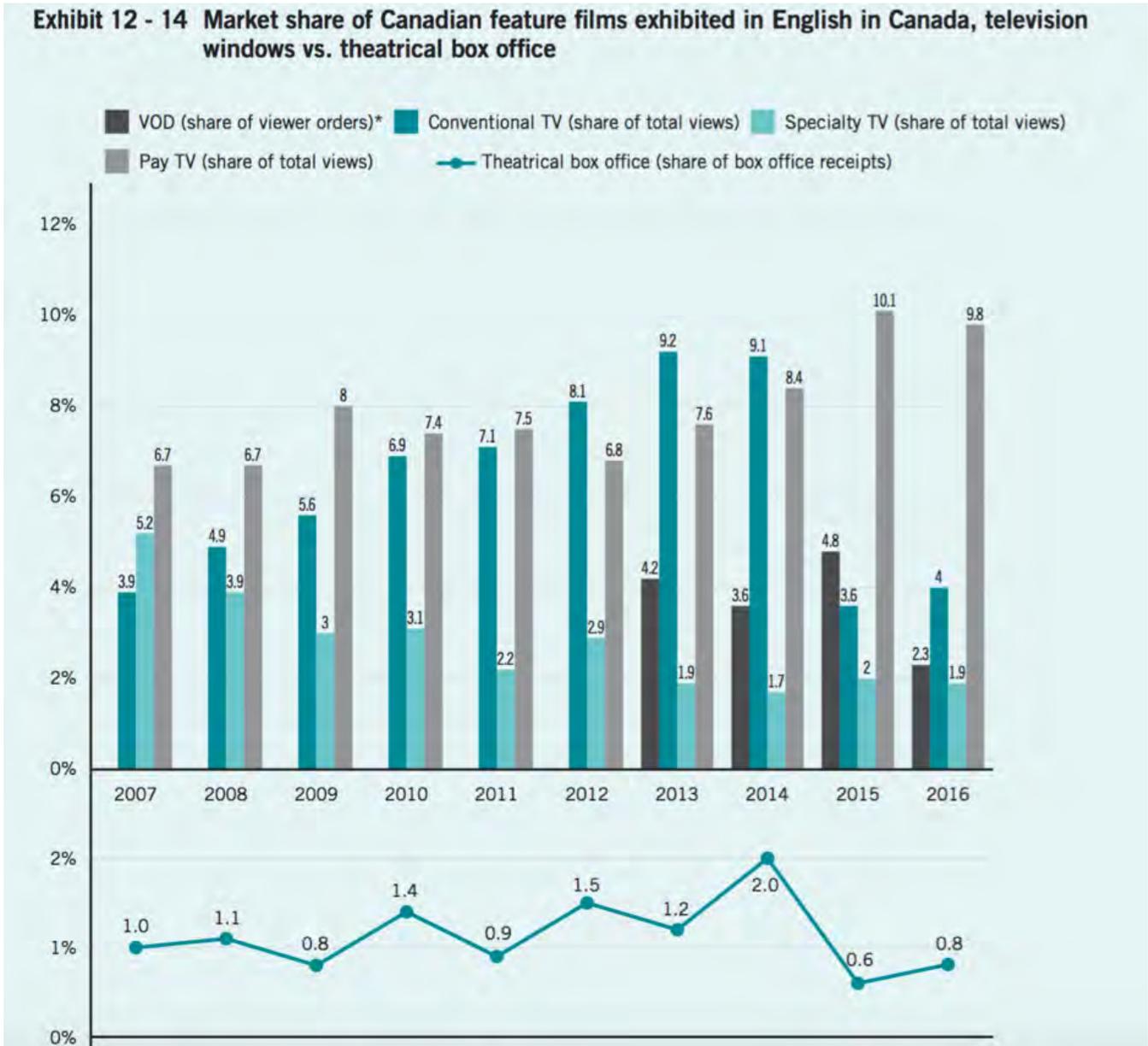
Note: FLS is defined as Foreign Location and Service Production

Footnote 11 – Fig. 7 Box Office Revenues in Canada



Source: 2017 Profile Pg. 109

Footnote 13 - Fig. 8 Market Share of Canadian feature films exhibited in English in Canada



Source: 2017 Profile pg. 116

Footnote 25 – Fig. 9 Harold Greenberg Fund Harold Greenberg Funding Data from 2013-2017⁷⁵

Fiscal Year	Applications received	Applications Supported	% of applications supported	\$ Amount Funded
F2017	248	76	31%	\$ 1,002,050
F2016	278	82	29%	\$ 934,299
F2015	287	57	20%	\$ 742,050
F2014	249	71	29%	\$ 816,350
F2013	267	57	21%	\$ 662,500

*data reflects script development and story option programs

Footnote 27 – Fig. 10 Rate of Successful Telefilm Production Fund Applications (Received in Fiscal Years 2012-2013 to 2016-2017 for English Language Productions, excluding Micro-budget and Mini-Treaty)⁷⁶

	\$2.5M or More			Below \$2.5M		
	Applications Received	Applications Signed	% of Received Apps. Signed*	Applications Received	Applications Signed	% of Received Apps. Signed*
CFFF-Main Production program						
Ontario Only	85	36	42%	234	52	22%
Canada	149	64	43%	518	130	25%
Theatrical Doc Program						
Ontario Only	1		N/A	37	9	24%
Canada	1		N/A	68	13	19%
Total						
Ontario Only	86	36	42%	271	61	27%
Canada	150	64	43%	586	143	28%

*The success rate is usually higher for bigger budget application requests, as the Fast Track Stream clients are often more active in this bigger budget class. Twenty-one of the sixty-four signed contracts are with Fast Track Stream clients. The Fast Track Stream provides an accelerated evaluation to applicants with a demonstrated 'ability to produce feature films that have achieved a very high level of success on a regular basis'⁷⁶ Please see the FAQs here: <https://telefilm.ca/en/financing/production> for more information about the Fast Track program

⁷⁵ <http://www.bellmedia.ca/harold-greenberg-fund/annual-reports/>

⁷⁶ Telefilm, Canada Feature Film Fund, Production Program for English and French Language Productions, Guidelines, pg. 8

Fig. 11 Rate of successful OMDC Feature Film Fund Production Applications
 OMDC Film Fund Production Number of Requests and Approvals from 2005/06-2016/17

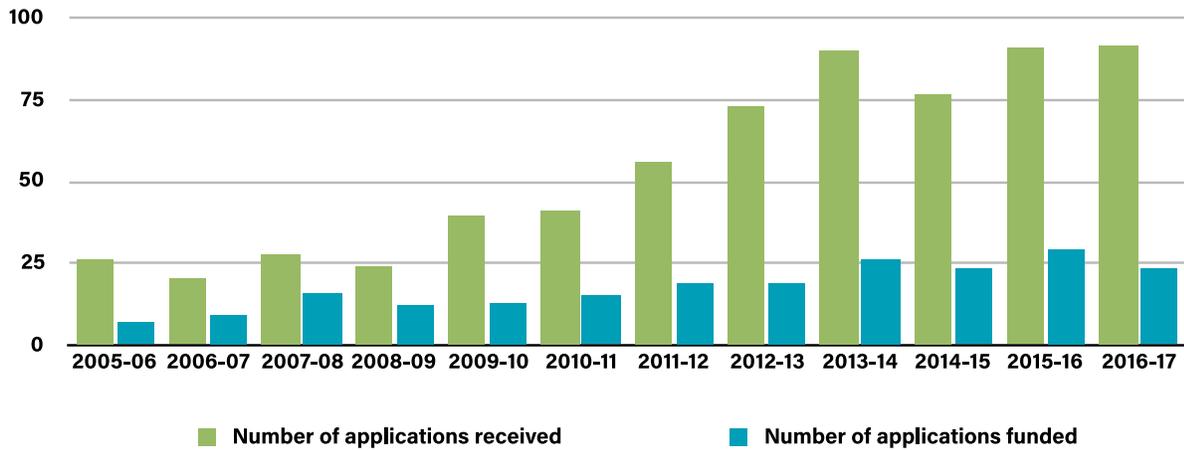
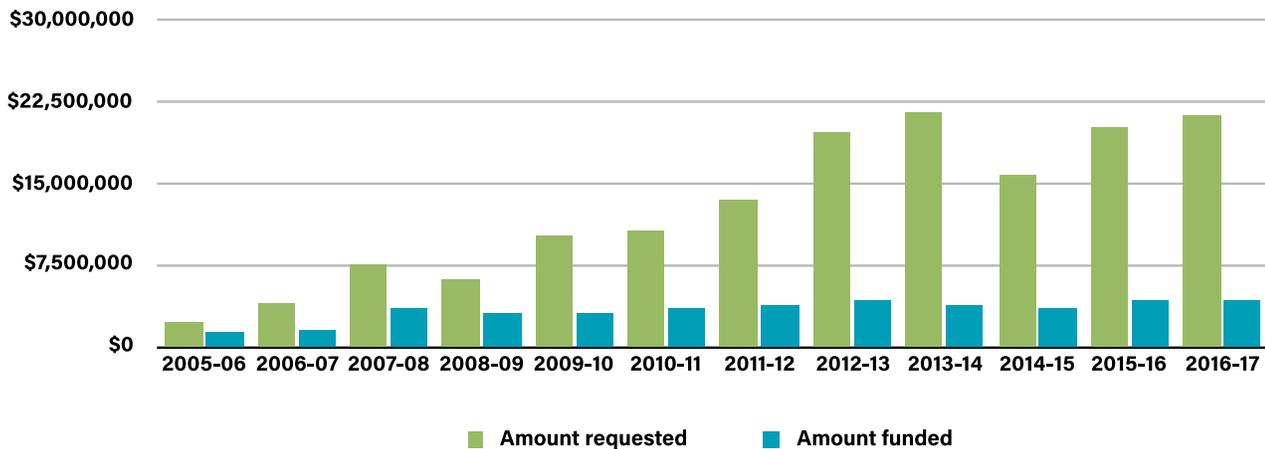


Fig. 12 Amount of OMDC Film Fund Funding Requested and Granted
 OMDC Film Fund Amount of Funding Requested and Amount of Funding Granted for 2005/06-2016/17



Appendix D Feature Film Funding in Other Jurisdictions

Available funding has a direct impact on how many feature films are produced in each province, though other factors such as the size of the industry, size of the audience and in the case of Quebec, the greater need for culturally relevant content, also play a role. This report selected Quebec and Manitoba as they both have a provincial funding agency that prioritizes funding feature film, similar to the OMDC. It would be useful to compare funding and production levels for feature films in different provinces but unfortunately each province generally reports its investment in film and television differently, making it difficult for statistical comparisons. For example, the OMDC reports on a calendar basis while Quebec and Manitoba report on a fiscal year. Ontario identifies its Feature Film Fund but does not separate film from television in its reporting of the Ontario Film and Television Tax Credit. Manitoba reports on a combined investment in equity and tax credits to feature film or reports on combined film and television investment in each of equity or tax credits. Keeping that in mind, a description of the investments in feature film in Quebec and Manitoba are useful.

Quebec (population 8.2 million)

Seven of the top ten highest grossing films at the Canadian domestic box office in 2017 were Quebec productions;⁷⁷ *De père en flic 2* and *Bon Cop Bad Cop 2* each made over \$7M at the domestic box office; forty-two percent of Canadian films in 2016 were produced by Quebec based producers; and fifty-four percent of the Canada's Top Ten⁷⁸ from the last five years were Quebec films. Since the Canadian Screen Awards were created in 2013, four of the 6 Best Film winners were from Quebec. Quebec cinema has been able to develop within the Quebec market because of the need for French language and cultural content and the language barrier that reduces the competition from Hollywood for audience. However, Quebec has also been successful over the years in developing a brand and internationally renowned directors (e.g. Denis Villeneuve, Xavier Dolan, Jean-Marc Vallée, Léa Pool, Denys Arcand). A 2014-15 report was prepared for FilmOntario entitled "How the Industry Can Work Together to Increase the Market Share of Ontario Feature Films" and included an entire section of "Lessons from Quebec"⁷⁹ which focused extensively on what Quebec cinema is doing to promote local films including their industry oriented Cine-Quebec organization, Québec Cinéma, and the privately owned theatres/exhibition markets.

Quebec also invests a great deal in domestic feature films. In 2016-17, 36 domestic films received public financing from Société de développement des entreprises culturelle ("SODEC") with \$24 million of that amount as equity.⁸⁰ In comparison, the OMDC's Ontario Film Fund spent \$4.5 million on 38 projects. Figure 13 compares the cost of production of Quebec and Ontario films from 2014-2017.⁸¹ Despite having a population that is 60% that of Ontario's, Quebec is spending five times more on feature film equity and has consistently invested in feature film since SODEC was created in 1983 "(note, that as mentioned earlier in this report, Ontario had no film fund for ten years prior to 2006 due to government cuts).

⁷⁷ <http://playbackonline.ca/2017/12/20/top-grossing-films-of-2017/>

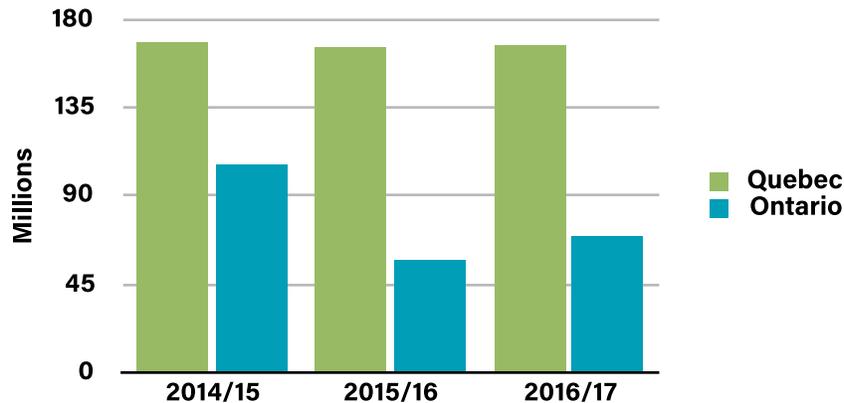
⁷⁸ Canada's Top Ten Film Festival is an annual festival run by the Toronto International Film Festival to celebrate Canadian film from the previous calendar year. The festival is held at the TIFF Lightbox and tours select locations across Canada.

⁷⁹ Neil, G. & Pineau, A. (March 2014). How the Industry Can Work Together to Increase the Market Share of Ontario Feature Films. Retrieved from: http://www.omdc.on.ca/Assets/Research/Research+Reports/Film+Ontario+Lessons+from+Quebec/Film+Ontario+Lessons+from+Quebec_pdf.pdf

⁸⁰ From: Statistiques sur l'industrie du film et de la production télévisuelle indépendante, 2017. <http://www.stat.gouv.qc.ca/statistiques/culture/cinema-audiovisuel/film2017.pdf>

⁸¹ Information from Statistiques sur l'industrie du film et de la production télévisuelle indépendante Tome 2, 2017. (<http://www.stat.gouv.qc.ca/statistiques/culture/cinema-audiovisuel/stats-industrie-film.html>) and OMDC Annual Reports.

Fig. 13 Cost of Domestic Production Between Quebec and Ontario for the Last Three Years⁸²



Note that as the average French language fiction film budget in Canada is \$3.5 million while the average English language fiction film budget in Canada is \$3.2 million, the additional funding available appears to also contribute to a slightly higher and therefore more competitive budget.

It should also be noted that SODEC has “the mandate to promote and support the introduction and development of cultural enterprises in all regions of Quebec.”⁸³ While SODEC’s mandate is more focused on the creation and promotion of Quebec culture in their documentation, the OMDC’s mandate is business, investment, and job creation.⁸⁴ This may explain why SODEC’s budget for feature film is so much larger than the OMDC’s as Ontario film production is just one of many possible tools for the development of industry and job creation but SODEC is the primary resource for the development of Quebec culture.

Quebec films have benefitted from years of substantial financial support, a captive audience with less competition from Hollywood and the development of an awareness by audiences of their directors, writers, producers and actors due to their visibility through regular and consistent production, media programs and publications dedicated to culture and accessibility through exhibition. The result is a significant audience demand. As a result, Quebec feature films and Quebec directors have developed a brand that has become known around the world with recent successful directors such as Denis Villeneuve and Jean-Marc Vallée now working in Hollywood. An updated version of “Lessons from Quebec” that looks beyond the industry organizations to cultural, box office, and distribution models would be useful for the Ontario industry.

⁸² Note that Ontario statistics are based on a calendar year while Quebec’s are based on fiscal year

⁸³ <http://www.sodec.gouv.qc.ca/foreign-visitors/foreign-visitors-copy/>

⁸⁴ http://www.omdc.on.ca/about_us.htm

Manitoba (population 1.28 million)

Production in Manitoba is going through a current boom: in 2017-18 they will have a production volume of around \$160M.⁸⁵ In a news article in 2017, Jeff Peeler from the Manitoba film and television producers' association On Screen Manitoba attributed the increase to: "the growth to a favourable Canadian dollar for American productions, generous provincial tax credits and a supportive local arts community."⁸⁶ Manitoba's tax credit is 65% with the Cost-of-Salaries Tax Credit (including bonuses) or 30% on all eligible Manitoba expenditures with the Cost-of-Production Tax Credit. Only Manitoba-resident or Canadian-resident production companies are eligible for the tax credit. In contrast, Ontario's OFTTC is 35% of qualifying Ontario labour expenditures (which is a much lower rate than the comparable 'cost of salaries' tax credit and a much smaller base for the calculation when compared to 'cost of production'). The province also has an online public awareness campaign called Get On Set Manitoba. The Get on Set website is run by On Screen Manitoba and Manitoba Film and Music (Manitoba's OMDC).

Manitoba is a frequent partner for Ontario productions seeking to fill the gap of financing available to them in Ontario. Such recent films as *My Awkward Sexual Adventure* (2012) have been Ontario-Manitoba co-productions. While co-productions can attract additional financing not available in Ontario, they also reduce the spend that might have otherwise been made in Ontario and the Ontario producers must sign away part of their copyright, right to revenues and fees in exchange for such financing.

However, Manitoba is not just seeing a rise in foreign production. In fall 2017, "seven local directors are either in pre-production, production or post-production on movies or television series."⁸⁷ Carole Vivier, CEO of Manitoba Film and Music, also identifies the high Manitoba tax credit in addition to the reduction or elimination of tax credits in other provinces, as a benefit to the increased production. She said: "Manitoba directors are really being able to make their mark," said Vivier. "You know, other production companies [are] coming in here, recognizing the depth of talent that we have and also hiring the Manitoba directors. It's this perfect thing that's kind of happened."⁸⁸ Manitoba Film and Music also administers a small Feature Film Production Fund and a small Feature Film Development Fund through which they supported 15 feature films in 2016/17 (compared to 39 films supported in development or production through the OMDC's Feature Film Fund⁸⁹).

Manitoba has developed a cultural hub of filmmakers and service workers that is able to take advantage of the province's high tax credit. It is still growing but the province's cultural industries are developing a brand through their public awareness campaign, Get On Set Manitoba, and Manitoba Film and Music (both of which have been lobbying producers over the last five years to move their productions to Manitoba).⁹⁰ Similar to Ontario, it is clear that Manitoba is working to develop both their local and service industry.

Next, Ireland, Sweden and Australia were selected for comparison as all three countries deal with similar challenges to supporting a domestic film industry as exists in Canada but have tried different solutions which could be educational for the Canadian industry. Following are some limited notables from these countries.

⁸⁵ <http://www.cbc.ca/news/canada/manitoba/manitoba-film-industry-best-year-1.4500870>

⁸⁶ <https://globalnews.ca/news/3302792/film-and-tv-production-revenue-way-up-for-manitoba/>

⁸⁷ <http://www.cbc.ca/news/canada/manitoba/homegrown-directors-rack-up-7-projects-amid-film-boom-in-manitoba-1.4375503>

⁸⁸ Ibid

⁸⁹ <http://mbfilmmusic.ca/reports/mfm-2016-2017-annual-report-en.pdf>

⁹⁰ <http://www.cbc.ca/news/canada/manitoba/manitoba-film-industry-best-year-1.4500870>

Ireland (population 4.8 million)

The Irish film industry is supported by the Irish Film Board (IFB), which acts as the national film agency and a major source of funding. They provide direct financial support for development, production and distribution and also offer a thirty-two percent tax credit.⁹¹

Funding reached a peak in 2008 (just before the global financial crisis) when the IFB had an allocation allowance of €20M (approximately \$30M CAD).⁹² In 2017, the IFB had a capital allocation of €12.7M (approximately \$19M CAD). As with Canadian films, many Irish films are turning to co-production as a source of money as the IFB cannot provide sufficient support. In the last five years there has been great success with Irish co-productions and many Irish/Canadian co-productions such as *Room* (Abrahamson, 2015), *Brooklyn* (Crowley, 2015) and *Maudie* (Walsh, 2016).⁹³

When asked why Irish film would need more money if it is able to create such internationally recognized productions after a forty percent funding cut from 2008, James Hickey, chief executive of the IFB said "It takes years to develop the creative talent that is now there. It is 20 years since the film board was re-established, and it has taken that time to develop the learning process. And it's an enormous learning process: the skills of creative producing, film directing, screenplay writing. It needs that *consistency* of support."⁹⁴ Note that this quote draws attention to the long-standing impact of the ten year gap in feature film funding between the demise of the programs at the OFDC in 1996 and the emergence of the programs at the OMDC in 2006 which is most likely still being felt.

In terms of audience support, Ireland is a country of movie-goers as it tied with France in 2016 for the most per capita cinema visits with an average of 3.3 per person.⁹⁵ However, despite film popularity and the public support, only three percent of their annual box office was for national films (though that is still higher than English Canada's 0.8% share of the market in 2016) as Hollywood films dominate even in Ireland.

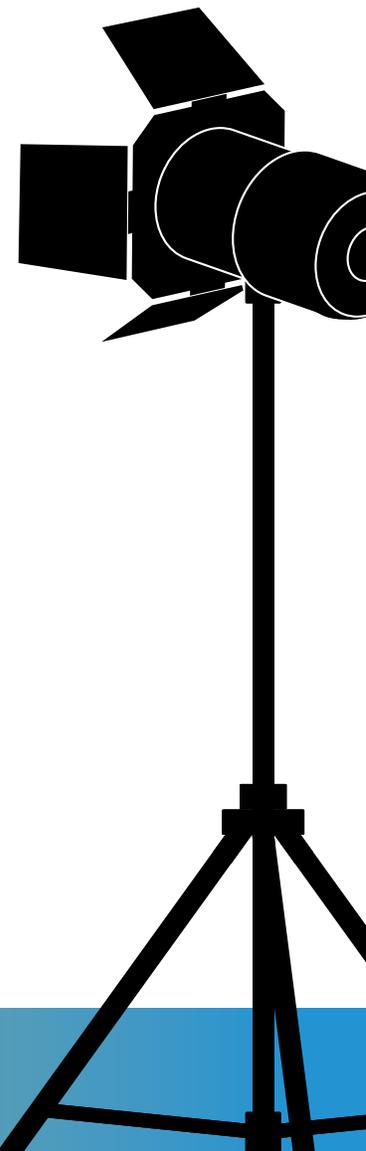
⁹¹ For more information on national content definitions in a number of jurisdictions please see "An International Comparative Study: How National Content is Defined in Canada and Selected Countries for the Purpose of Providing Access to Public Support" published by the Canadian Media Producers Association, December 2015, <http://www.omdc.on.ca/Assets/Research/Research+Reports/CMPA+-+International+Comparative+Study.pdf>

⁹² <https://www.irishtimes.com/culture/film/where-did-it-all-go-right-the-secret-of-irish-cinema-success-1.2541478>

⁹³ <http://www.thejournal.ie/irish-film-industry-2016-3123166-Dec2016/>

⁹⁴ <https://www.irishtimes.com/culture/film/where-did-it-all-go-right-the-secret-of-irish-cinema-success-1.2541478>

⁹⁵ UNIC Annual Report 2017, International Union of Cinemas, http://www.unic-cinemas.org/fileadmin/user_upload/wordpress-uploads/2017/06/UNIC_AR2017_EN_online.pdf, pg. 10



Sweden (population 9.9 million)

The Swedish film industry has been in the news recently due to their progressive mandate to reach gender equality behind and in front of the camera.⁹⁶ This mandate is largely attributed to Anna Serner, the CEO of the Swedish Film Institute (SFI). Since she began her role, the SFI has started a digital archive of women filmmakers to act as a knowledge bank and promotion of women in Scandinavian film (nordicwomeninfilm.se), now require production companies to get training in gender equality, sexual harassment and diversity,⁹⁷ and to achieve 50-50 gender parity in their films.⁹⁸ “Wherever [...] the SFI could identify a source of gender imbalance, they strived to counter it with a solution. Can’t find enough women directors? Try the NordicWomenFilm web portal. Women helmers having trouble funding their second or third films? Ask a female filmmaking veteran how they did it through the SFI’s mentorship program. Not enough young female directors applying for gigs? That’s where support comes in – in schools, camps and regional talent-development programs, all the way through festivals and competitions, with a focus on female role models. And lest the SFI get complacent, it has intensified its self-monitoring to make sure it stays on course.”⁹⁹

The SFI funds fifteen films a year with an average investment of \$1M US (\$1.28 million CAD).¹⁰⁰ Swedish films do very well in the theatre, capturing 14% of the market.¹⁰¹ The SFI’s mandate is “to support the production of new films, the distribution and screening of worthwhile films, to preserve and promote Sweden’s film heritage and to represent Swedish film at an international level – is defined in the Film Bill and in the annual document of grant appropriations from the Ministry of Culture.”¹⁰²

The SFI is governed by a board of nine members who appoint a CEO for the regular running of the Institute. There are seven commissioners who are appointed (two for feature films). The commissioners give their suggestions to the CEO who approves the funding “on the delegation of the board of the Film Institute”¹⁰³ The film commissioners’ mandate period is for 3 years and may be extended for a limited time.

Both the social justice focus and decision making terms of Sweden’s SFI were mentioned by our interviewees. The gender equality provisions and the limited terms of the film commissioners could be useful points for further study for the Ontario film industry.

⁹⁶ <http://www.filminstitutet.se/en/about-us/swedish-film-institute/gender-equality/>

⁹⁷ <http://www.independent.co.uk/arts-entertainment/films/news/sweden-film-companies-applying-for-funding-to-undergo-sexual-conduct-training-alicia-vikander-a8056866.html>

⁹⁸ <http://www.indiewire.com/2016/02/how-the-swedish-film-institute-achieved-50-50-funding-distribution-between-male-and-female-directors-204741/>

⁹⁹ <http://www.indiewire.com/2016/02/how-the-swedish-film-institute-achieved-50-50-funding-distribution-between-male-and-female-directors-204741/>

¹⁰⁰ <http://www.indiewire.com/2015/05/swedish-film-institute-achieves-50-50-funding-distribution-for-male-and-female-directors-203549/>

¹⁰¹ UNIC Annual Report 2017, International Union of Cinemas, http://www.unic-cinemas.org/fileadmin/user_upload/wordpress-uploads/2017/06/UNIC_AR2017_EN_online.pdf, pg. 10

¹⁰² <http://www.filminstitutet.se/en/about-us/swedish-film-institute/mission-and-organisation/>

¹⁰³ <http://www.filminstitutet.se/en/funding/funding-from-the-swedish-film-institute/film-commissioners/>

Australia (population 24.7 million)

In 2016, Australian or shared control feature films earned 1.9% of the total Australian box office, comparable to Canada's share at 0.8%.¹⁰⁴ In 2015 that number was significantly higher with 7.2% of the total box office due to the success of such films as *Mad Max: Fury Road* and *The Dressmaker*. However, Sydney Herald journalist Andrew Hornery explains that the Australian industry suffers from a lack of Australian films telling Australian stories.¹⁰⁵ He concludes that "If audiences don't turn up to pay and see these films, a truly Australian film industry will need much more than *Thor's* bulging biceps to survive" (a reference to Australian actor Chris Hemsworth who plays Thor in the Marvel film series).

Matthew Deaner, another Sydney Herald journalist, identifies the industry as being at a crossroads.¹⁰⁶ He explains that due to government cuts to Screen Australia, the Australian Broadcasting Corporation, and SBS TV, filmmakers are seeking money from international sources (both distributors and financiers). Screen Australia provides funding programs from development through to international marketing support and provides funding to over fifty percent of the country's films.¹⁰⁷ However, over five years, the government cut funding for Screen Australia by \$51M AUS (\$50.29 million CAD). In that same time, they provided around \$70M AUS (\$69.03 million CAD) to American blockbusters and provided a series of offset tax breaks for locations, producers, etc.¹⁰⁸ As in Canada, though the foreign production provides jobs for Australian crews, it does not develop Australian films, or screenwriters, directors or producers. Adding to the difficulty of financing is the fact that entertainment visa rules limit the international talent, often used to attract funding, allowed into the country.

¹⁰⁴ <https://www.screenaustralia.gov.au/fact-finders/cinema/industry-trends/box-office/australian-box-office>

¹⁰⁵ <http://www.smh.com.au/lifestyle/celebrity/private-sydney/time-for-the-australian-movie-industry-to-reflect-australian-culture-20171024-gz7mce.html>

¹⁰⁶ <http://www.smh.com.au/comment/australian-film-industry-is-at-a-crossroads-20170227-gum6rb.html>

¹⁰⁷ <http://www.australiangeographic.com.au/topics/history-culture/2017/01/australian-film-industry>

¹⁰⁸ <https://theconversation.com/why-is-the-australian-government-funding-hollywood-films-at-the-expense-of-our-stories-79898> and <https://www.theguardian.com/business/grogonomics/2015/oct/26/how-much-does-australia-really-subsidise-overseas-films-and-is-it-worth-it>

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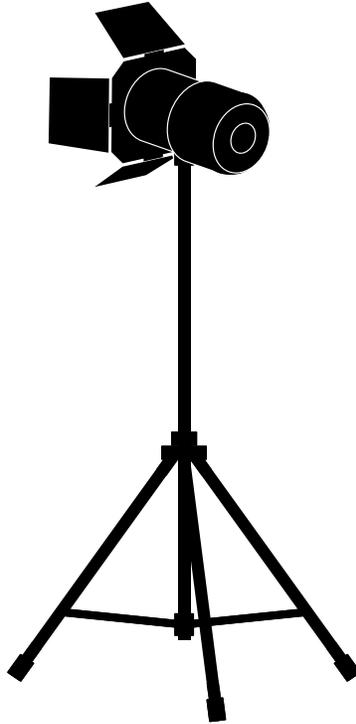
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