Research Report

Getting Real 8

Prepared for: Documentary Organization of Canada (DOC)

March 2025

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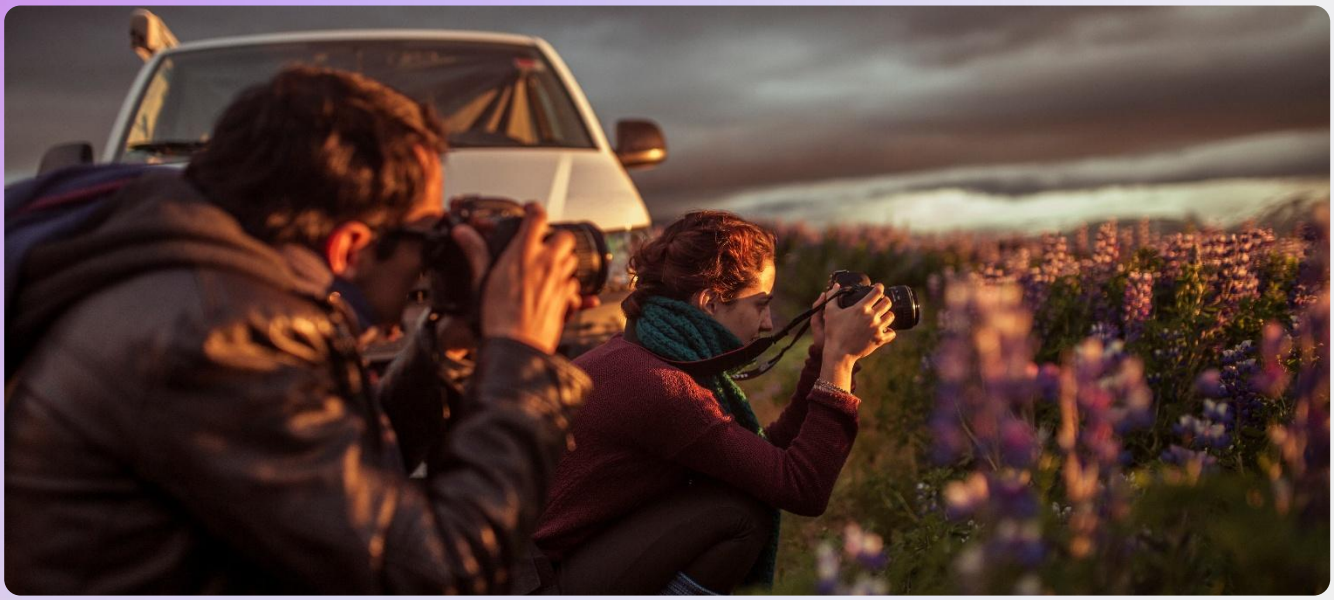

Executive Summary

The Documentary Organization of Canada (DOC) commissioned Nordicity to develop the eighth edition of "Getting Real". In the new edition of this cornerstone industry report, "Getting Real 8" looks at the economic impact of documentary production from 2019/20 to 2023/24, as well as trends in production, budgets and financing, and audiences. In addition to the economic profile of the industry, the report considers the challenges the industry and community face.

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

Key Trends, Challenges and Opportunities

The global audio-visual industry is undergoing significant shifts. Streaming platforms are prioritizing profitability following years of aggressive content spending. This includes reduced original content spending commitments (shorter seasons, fewer original shows) and shifting their business model to include advertising tiers within subscription packages. In addition, streamers are moving towards redirecting some content spending to live events and sports with built-in audiences to attract advertisers. Meanwhile, broadcasters are adjusting content spending as audiences, and related advertising revenue migrate to streaming platforms. While original content spending may be lower, the audio-visual market is still a crowded place. The world's largest streaming platforms released a combined 1,752 titles and 4,878 hours of first-run original content in 2022.

Within the Canadian audiovisual production sector, lower broadcaster revenues generally result in lower overall contributions to Canadian programming expenditures (CPE) and programming of national interest (PNI), contributing to a decline in Canadian content production. The regulations being developed and implemented by the Canadian Radio-Television and Telecommunications Commission (CRTC) under the Online Streaming Act may result in new content funding streams. In 2024 the CRTC announced that under the *Act* certain foreign streaming services must contribute 5% of their annual Canadian revenues to specified production funds, representing an estimated $200 million in annual investment into the Canadian audio-visual industry. Foreign streaming platforms have protested the CRTC decisions to the Federal Court of Appeal, a ruling is anticipated in June 2025 well before the August 2025 due date for the contributions. The new Trump administration in the U.S. is making announcements that are resulting in overall economic uncertainty. In addition, President Trump has stated his intention to "investigate countries with tax rules that are extraterritorial and disproportionately affect American companies".

Other CRTC consultations underway will impact the Canadian audiovisual sector in the future. This includes a consultation on the definition of "Canadian Content" including the use of long-standing regulatory mechanisms of CPE and PNI requirements. Another critical consultation launched in February 2025 will "examine the market dynamics between small, medium, and large programming, distribution, and online services, and the tools available to ensure the sustainability and growth of Canada's broadcasting system."

These global market trends, and specific Canadian market shifts, impact the documentary sector, bringing both challenges and opportunities for growth. There is worldwide increased demand for documentaries with many seeing this as a "golden age" for the genre. The global documentary market is estimated to increase at a compound annual rate of 5.8% and will be valued at $16.1 billion by 2030. This growth can be attributed to the popularity of documentaries with wide appeal in genres such as true crime, sports, and celebrity biographies on streaming platforms. The demand for documentaries from streaming platforms has led to production challenges, as timelines may be compressed, and ethical journalistic norms are becoming less strict. Despite the growth in interest and demand for documentary productions, Canadian filmmakers face rising production costs, stagnant broadcaster license fees, and difficulties in securing funding. Additional disruptions such as the financial challenges faced by the Hot Docs Film Festival (the largest international documentary festival and market in Canada) and the closure of American production company Participant Media, highlight the impact of broader systemic changes, both in Canada and beyond, on documentary production in Canada.

Economic Impact of Documentary Production

The Canadian independent documentary production sector is a strong contributor to the Canadian economy, with almost $2.1 billion in production volume during the five-year period from 2019/20 to 2023/24 (government fiscal year).

Despite an industry decline in total Canadian production volume in 2020/21 as a result of the COVID-19 pandemic, Canadian documentary production volume grew and continued to do so in 2021/22, reaching a peak in 2022/23 before experiencing a slight decrease in 2023/34.That being said, documentary production is still well above pre-pandemic levels, indicating a growing interest in this genre, driven in part by increased streaming viewership.

Series in particular have driven the overall growth of Canadian documentary production. During the five-year period under review, the volume, number of productions, and number of hours of documentary series produced has doubled. In contrast, single-episode/one-off documentaries experienced a significant decline between 2019/20 and 2023/24, with production volume halved between 2022/23 and 2023/24

The independent documentary production sector in Canada contributed $540 million to Gross Domestic Product (GDP) in 2023/24 based on $472 million in direct production spending which supported an estimated total 6,160 FTEs (direct, indirect and induced).

Documentary Production Budgets

Average per-hour production budgets for English-language documentaries fluctuated between 2019/20 and 2023/24. Single-episode/one-off documentaries had the highest budgets per hour of all English-language types in fiscal years 2019/20 and 2020/21, and since 2021/22, feature length documentaries have recorded the highest per-hour average budgets.

In 2023/24, average per-hour production budget for English-language feature-length (film or TV) documentaries was $572,074, followed by single-episode/one-off with an average of $523,897. Documentary series had significantly lower per-hour budgets, at only $365,752 in 2023/24.

Between 2019/20 and 2023/24, feature-length projects continued to have the highest budgets per hour of all French-language types, with an increasing average per-hour budget across all types. Single-episode documentaries recorded the second largest per-hour budgets, with an average of $379,314 in 2023/24.

Financing of Documentary Production

Data from CAVCO suggests that between 2019/20 and 2023/24 the largest share of Canadian documentary financing came from provincial tax credits ($405.5 million), followed by private Canadian broadcasters ($332.4 million), the Canada Media Fund ($293.1 million), and Canadian distributors ($245.3 million).

In 2023/24, provincial tax credits made up 19% of total financing, remaining stable over the five-year period. Similarly, private Canadian broadcasters doubled their contribution to documentary production over the past five years, now also making up 19% of total financing. While the Canada Media fund continues to provide critical financing to the industry (approximately $64 million in 2023/24), its share of total financing also dropped from 17% to 13% between 2019/20 and 2023/24.

The overall financing structure is marginally different when focusing on English-language production. Provincial tax credits remain the largest source of financing, with 20% ($319 million) over the past five years. Despite fluctuations in financing between 2019/20 and 2021/22, the overall financing for all types of French-language documentary production has increased from $72.2 million to $118.7 million. Over the five-year period, the largest share of financing for French-language documentary came from private Canadian broadcasters (26%). Notably, there is considerably less (or close to no) funding from foreign sources and Canadian distributors for French documentary productions. Because broadcasters typically want French documentary productions to remain highly localized, it is challenging for them to sell their content internationally.

Audiences for Canadian Documentaries

Television is the principal channel through which Canadian audiences discover and watch feature-film documentaries. In fact, among the 45% of movie watchers who like to watch documentary, 77% prefer to see them at home as opposed to only 3% who indicated a preference for movie theatres. Canadian audiences also recognize the high-quality of documentary feature film and rank this genre second in terms of perceived quality, before comedy movies and drama movies.

Viewership of Canadian documentaries spiked during COVID-19 lockdowns, both within Canada and internationally, with viewers becoming more interested in true crime content, productions that were escapist in nature, and projects engaging with social issues. This interest seems to have somewhat persisted beyond the core pandemic years.

Both English-language and French-language Canadian documentary television productions reached peak average weekly viewing hours in 2020 but declines in 2021 were minimal and followed by an upward trend leading to significant viewing hours in 2023/24. Approximately 45% of English-language television documentary viewing hours are attributable to Canadian documentaries (as opposed to foreign documentaries), though this percentage is in slight decline, particularly during peak period viewing hours. In contrast, the French-language television documentary market is much more heavily dominated by Canadian productions, with over three quarters of viewing time, but also following a noticeable downwards trend.

1. Introduction

1.1. Context

Since 2003, the Documentary Organization of Canada (DOC) has commissioned multi-year, in-depth profiles of Canada's independent documentary production sector including for both English- and French-language markets. These "Getting Real" reports provide a clear and timely view of the economic trends that impact the documentary sector.

In response to the Canadian Radio-television and Telecommunications Commission (CRTC) ongoing implementation of its regulatory plan to modernize Canada's broadcasting framework under the Online Streaming Act, an Act that reforms the Canadian Broadcasting Act, DOC commissioned Nordicity to develop the eighth edition of Getting Real. "Getting Real 8" looks at the economic impact of documentary production from 2019/2020 to 2023/2024, as well as trends in production, trends in budgets and financing, and audiences. The report also considers the challenges the industry and community face. The *Broadcasting Act* now requires online platforms to contribute to the production of Canadian content for the first time, as Canadian broadcasters have been required to do for thirty years. The broadcast-driven system that has shaped multiple generations of Canadian documentary filmmakers and producers has shifted to a combined broadcast and online environment. This new environment includes emerging policy and increased focus on the discoverability and promotion of Canadian content.

While increased funding and visibility of Canadian content may be supported through emerging CRTC regulation, uncertainties about implementation and shifts in audience behavior represent continued risks. Documentary filmmakers will need to continue to adapt to identify and interact with new funding mechanisms, distribution strategies, and regulatory requirements to remain competitive and take advantage of the increased interest in documentary production observed in recent years.

1.2. Methodology

The study was developed using a mixed-methods approach including a literature review and analysis of industry data. Data from the Canadian Audio-Visual Certification Office (CAVCO) formed the foundation of the statistical and financial analysis of the documentary sector, and where possible (and applicable), on data was also drawn from funding bodies such as Telefilm Canada (Telefilm), the Canada Media Fund (CMF), and the National Film Board of Canada (NFB). In order to protect anonymity, data points with a low number of responses were not shared with Nordicity and therefore not reported.

Throughout the report, data exhibits are broken out by documentary type. While these type designations are largely self-reported by producers, in general, feature-length (film or TV) documentaries are over 75 minutes long, non-feature one-off documentaries are under 75 minutes, and series are 2 episodes or more (episodes may be of varying lengths). When data is broken down by language, English-language documentary production must be understood as English and all other languages except French.

2. Key Trends, Challenges and Opportunities

2.1. State of the Canadian Audio-Visual Industry

The audio-visual industry is facing significant shifts and disruptions, both internationally and domestically. In order to understand the state of the Canadian documentary sector, it is important to understand the wider industry context.

Foreign streaming platforms, which previously spent aggressively to build their subscriber base, are now focused on profitability, leading to more cautious content spending. This includes reduced original content spending commitments (shorter seasons, fewer original shows) and a shift in their business model to include advertising tiers within subscription packages. As a result, the high production volume seen in the last several years (excluding the pandemic period) is anticipated to plateau or decline. Additionally, streaming leaders, Netflix and Amazon, are spending a higher proportion of their production budgets internationally and outside of North America, to improve efficiency and align with global business models. In 2024, for the first time, Netflix's international content spending ($7.8 billion) exceeded North American spend ($7.5 billion).[1] As streamers have introduced ad-supported subscription tiers, they are shifting focus to content that is most attractive to advertisers, such as live events and sports, and drifting slightly away from scripted and unscripted content. While original content spending on scripted and unscripted content may be lower, the audio-visual market is still very crowded. The world's largest streaming platforms released a combined 1,752 titles and 4,878 hours of first-run original content in 2022.[2]

With ad spending, sports, and live events migrating towards streaming services, traditional Canadian broadcasters are in a precarious position. Overall revenues are declining, resulting in lower contributions to Canadian programming expenditures (CPE) and Programming of national interest (PNI). In 2024, amid low profitability and uncertainty, major broadcasters like Bell, Rogers, and Corus requested regulatory relief from the CRTC, claiming that the contributions required under current broadcasting license agreements are too onerous. The CRTC granted Corus, which is facing the most significant financial crisis as it is in over $1 billion in debt and close to bankruptcy, a reduction in its PNI; however, the CRTC has denied amendments to other broadcasting licenses as it continues to reassess Canada's broadcasting framework. CPE and PNI expenditures are determined as a percentage of annual gross revenues of the broadcaster, as a result when broadcaster revenue declines, original Canadian content production is at risk.

In June 2024, as part of the regulatory framework under the Online Streaming Act, CRTC announced that streaming services earning over $25 million annually in Canada must contribute 5% of their annual gross revenue (estimated to collectively represent $200 million annually), to the Canadian broadcasting system.[3] This base contribution is to be made via several independent production funds. This monetary injection into

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[1] The Hollywood Reporter. "The Post-War Streaming Market". September 2024.

[2] Lerner, Jessica."Report: Streaming Services Released 60% More Original Titles in 2022, But Can This Pace Continue in 2023?". The Streamable. March 2023.

[3] CRTC. "Broadcasting Regulatory Policy CRTC 2024-121: The Path Forward-Supporting Canadian and Indigenous content through base contributions." June 2024.

the system will help support the production of a variety of Canadian content; however, the total estimated amount is considerably lower than the estimated $830 million initially predicted when the Act was first proposed.[4] Furthermore, major streamers have protested the CRTC's decision to the Federal Court of Appeal, a ruling is anticipated in June 2025 well before the August 2025 due date for the contributions. American streaming services may see support for their position opposing the CRTC base contribution decision from the Trump administration's "America First" policies, which may characterize levies against American companies as discriminatory. A presidential executive order signed in January 2025 directs the United States Treasury Secretary to "investigate countries with tax rules that are 'extraterritorial or disproportionately affect American companies.'"[5]

Contributions and regulations will continue to evolve as the CRTC works to define "Canadian Content" under Canadian industry pressure to apply CPE and PNI requirements to both broadcasters and streamers. Another critical consultation launched in February 2025 will "examine the market dynamics between small, medium, and large programming, distribution, and online services, and the tools available to ensure the sustainability and growth of Canada's broadcasting system."

2.2. State of the Canadian Documentary Sector

The shifts within the Canadian and global AV production sector have had a notable impact on the documentary sector. Audiences are increasingly consuming unscripted and documentary content, with some considering the last several years a "golden age" for documentaries. Parrot Analytics reported that from 2019 to 2022 U.S. demand for documentaries increased by 186%.[6] Additionally, a study on Canadian feature film consumption by Telefilm Canada found that Canadians ranked documentary films as having the second highest level of quality among all genres.[7] The global documentary market is predicted to increase at a compound annual rate of 5.8% and will be valued at $16.1 billion by 2030.[8] This growth and interest is driven by streamers and their investment in documentary production. Streamers, and broadcasters, in the race to attract audiences have increased investment in documentary series with confirmed broad audience appeal, including true crime, sports, and celebrity biographies.

With the shift to series and topics with confirmed audiences, some characterize the "golden age" of documentary as a "corporate age." In a broadcast and streaming environment where audience volume is the key focus, documentary production likely to attract a large audience with relatively little marketing effort because a known celebrity is attached, or the broad topic has a following is more easily financed than documentary productions that focus on social or political messaging and where significant effort may be

[4] Carmel, Denis. "Bill C-10: $830 million in new Cancon funding is an "illustrative estimate"". CARTT. February 2021.

[5] The Canadian Press. "Canada's digital services tax, online regulation bills a likely Trump trade target." CTV News. January 2025.

[6] Galuppo, Mia and Katie Kilkenny. "Inside the Documentary Cash Grab". The Hollywood Reporter. September 2022.

[7] Telefilm Canada. "Canadian Movie Consumption: Exploring the Health of Feature Film in Canada". October 2023.

[8] Verified Market Reports, "Global Documentary Film and TV Show Market By Type (English, Chinese), By Application (Man, Woman), By Geographic Scope And Forecast." March 2024.

required to build an audience.[9] In this “corporate age” , changes in documentary production have emerged. Production timelines have been condensed, and series have been pushed to adopt a formulaic approach to meet streamer demands. New roles previously not needed in documentary, like story editors and story producers, are now needed to save time in post-production.[10] In this era, practices that were previously seen as unethical have become more accepted, like paying sources and interviewees, and subjects having creative or editorial control. These ethical shifts are a result of the competition for exclusive access to primary sources and the increased demand for celebrity biographical documentaries.[11] While it has always been difficult to fund the production of documentary focused on social, political, arts and /and cultural matters, the present shift to broad appeal series risks a gap in civic discourse, as documentaries play crucial roles in raising awareness, driving change, and giving a platform to marginalized communities. At the same time, because streaming platforms are less interested in feature documentaries (unless they have a confirmed audience), there may be increased opportunities for independent documentaries to be recognized and see success during award season, creating audience demand.[12]

Canadian filmmakers operate in the global market and face the challenges resulting from a focus on broad appeal documentary series by streamers (and broadcasters). Rising production costs are another key challenge. In a survey of documentary producers conducted by the CMF, respondents observed that cost increases were mostly in below-the-line labour and travel/accommodations.[13] Respondents also stated that despite costs increasing, broadcast licenses have not risen, and the Canadian dollar has continued to weaken.[14] The continued decline in linear broadcast windows for documentary production represents a barrier to documentary financing, as having a Canadian broadcast license remains fundamental trigger to accessing other funding. And broadcasters, like streamers are focused on documentary series with broad audience appeal.

The rise in documentary viewing, is driven in part by increased leisure time devoted to watching audiovisual content during the pandemic, coupled with access to streaming services, has meant that most documentaries are consumed online and as series, putting feature-length documentaries in jeopardy.[15] Documentary series are more appealing to streaming platforms because they keep audiences engaged on their platforms longer than features.[16] While there is a general perception that one-off or feature-length documentaries are better for author-driven, culturally relevant documentaries, the CMF’s September 2024 Genre Report: Children and Youth and Documentary noted that based on a survey of documentary

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[9] Kaufman, Anthony. “This Was the Year That the Golden Age of Documentary Felt Like a Distant Memory”. Indie Wire. December 2023. Vourlias, Kristopher. Fremantle's Mandy Chang Warns of a 'Corporate Age' of Documentary. Variety. April 1, 2022.

[10] Galuppo, Mia and Katie Kilkenny. “Inside the Documentary Cash Grab”. The Hollywood Reporter. September 2022.

[11] Galuppo, Mia and Katie Kilkenny. “Inside the Documentary Cash Grab”. The Hollywood Reporter. September 2022.

[12] Kaufman, Anthony. “This Was the Year That the Golden Age of Documentary Felt Like a Distant Memory”. Indie Wire. December 2023.

[13] CMF. “Genre Report: Children and Youth and One-Off Documentary”. September 2024.

[14] CMF. “Genre Report: Children and Youth and One-Off Documentary”. September 2024.

[15] Weaver, Jackson. “Canada's biggest documentary festival says it's dying. Documentarians worry they're next”. CBC News. May 2024.

[16] Galuppo, Mia and Katie Kilkenny. “Inside the Documentary Cash Grab”. The Hollywood Reporter. September 2022.

filmmakers, the filmmakers themselves do not see one type of production as better adapted to auteur-driven, culturally relevant stories.[17]

The Canadian documentary sector has also been disrupted by the organizational and financial challenges faced by the Hot Docs Film Festival. As one of North America's biggest documentary film festivals, Hot Docs has long provided opportunity for audience exposure as well as for business opportunities in terms of sales, distribution, and streamer/broadcast commissions.

These challenges are not unique to Canada's industry as documentary filmmakers in the United States and the United Kingdom are facing similar barriers. The 2024 closure of Participant Media, an American production company that focused on social change and behind films like *An Inconvenient Truth* and *The Cove*, was another blow to the documentary community. Participant was among the few champions and funders of documentaries and its closure could have lasting repercussions for the entire sector.[18]

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[17] CMF. "Genre Report: Children and Youth and One-Off Documentary". September 2024.

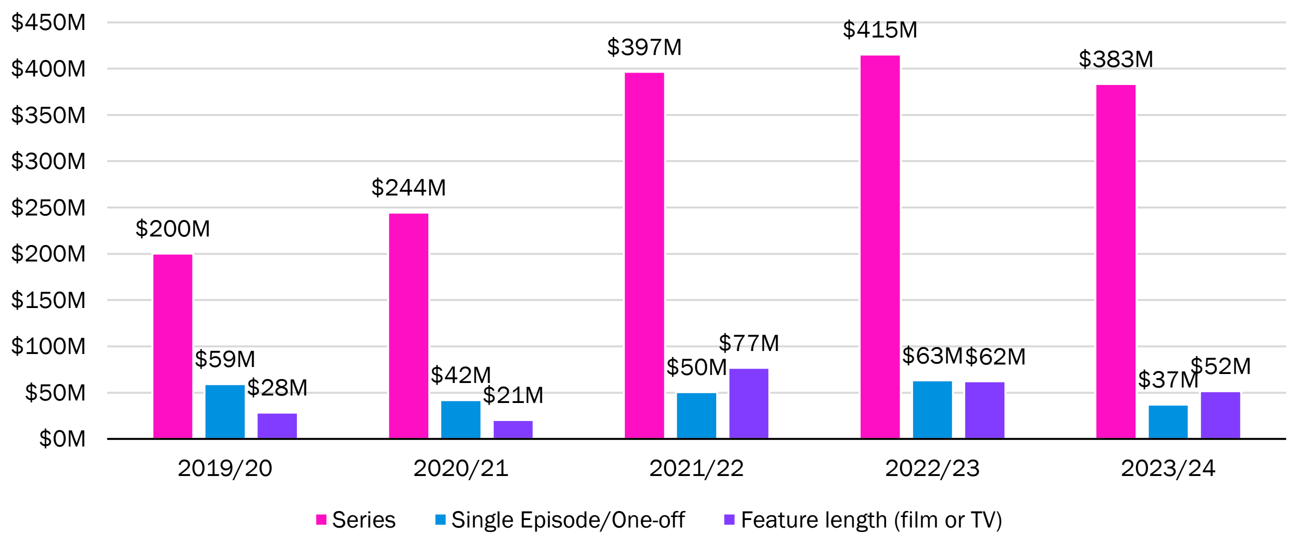
[18] Weaver, Jackson. "Canada's biggest documentary festival says it's dying. Documentarians worry they're next". CBC News. May 2024.

3. Economic Impact of Documentary Production

3.1. Overview of Canadian Independent Documentary

Canada's independent documentary production sector is a meaningful contributor to the Canadian economy. Looking at the five-year period of 2019/20 to 2023/24 (fiscal year), the total Canadian documentary production volume was $2.132 billion. Documentary series continue to dominate, representing a total production volume of $383 million in 2023/2024, followed by feature-length (for TV) at $52 million TV, and single-episode/one-offs at $37 million.

Figure 1 - Total Canadian Independent Documentary Production by Type: 2019/20 to 2023/24



Source: Nordicity estimates based on data from CAVCO

Canadian documentary, across all types, saw an overall 12.8% decline in total production volume in 2023/2024. Documentary series production decreased by 7.8%, while feature-length documentaries saw a decrease of 16%. Single-episode/one-off documentaries' production volume was almost halved, dropping from $63 million in 2022/2023, to $37 million in 2023/24. The situation of single-episode/one-off documentary production is described as a "boom and gloom" in CMF's first-ever *Genre Report* exploring Documentary and Children and Youth genres:

> "While there is a "golden age" of documentaries driven by increased streaming viewership, the market for one-off documentaries is facing challenges, particularly in financing. The rise of streaming platforms has led

> to declining audiences on linear broadcasters—the most critical trigger to unlock other funding."[19]

The overall decrease in documentary production from 2022/23 to 2023/24 aligns with trends across the entire Canadian audiovisual sector, which saw a total production volume decrease of 18.5% from 2022/23 to 2023/24.[20] In the case of scripted content, the overall decline is largely due to the 2023 Hollywood labour strikes and resulting lower than average volume of Foreign Location Services (FLS) productions. The documentary sector was minimally impacted by these strikes; however, like the rest of the industry, it was impacted by the general decline in Canadian broadcaster spending, especially in the English-language market. The recent decline in broadcaster spending is generally understood to be the result of two factors; changed spending patterns due to the COVID-19 pandemic; and the continued decline of Canadian broadcaster revenues. The COVID-19 pandemic delayed some productions, and broadcasters were provided regulatory relief around required Canadian programming expenditure obligations, which resulted in higher production spending post-pandemic in 2021/22 and 2022/23.

Table 1 - Total Production Volume of Canadian Independent Documentary Production by Type: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	200	244	397	415	383
Single-episode/One-off	59	42	50	63	37
Feature-length (film or TV)	28	21	77	62	52
Total	288	307	524	541	472

Source: Nordicity estimates based on data from CAVCO

Despite the decline in total documentary production between 2022/2023 and 2023/24, the total documentary production volume was $472 million in fiscal year 2023/2024 a nearly 64% increase to the $288 million recorded for the pre-pandemic fiscal year of 2029/2020. While productions levels are well above pre-pandemic averages, the continued decline of broadcaster revenues could lead to lower investment in independent production over time. At the same time, broadcasters seeking to attract and retain audience may continue to invest significantly in the relatively lower cost documentary series (as compared to scripted content).

The significant and sustained increase in the production volume of documentary series is reflected in the documentary share of the Canadian television series market. The share of documentary production volume

[19] CMF. "Genre Report: Children and Youth and One-Off Documentary". September 2024.

[20] CMPA. "Profile 2024: An economic report on the screen-based media production industry in Canada.". December 2024.

of all Canadian series increased from 9% to 14% (Table 2), and the share of the number of projects increased from 22% to 40% of all Canadian series (Table 4).

Table 2 – Share of Documentary Relative to Total Volume of All Canadian Content Production by Type: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	9%	13%	14%	14%	14%
Single-episode/One-off	56%	50%	50%	55%	37%
Feature-length (film or TV)	4%	3%	9%	6%	6%

Source: Nordicity estimates based on data from CAVCO

Despite the 6% increase in the number of series produced, the total number of documentary productions decreased by 12.3% from 2022/23 to 2023. Regardless of the significant drop in the production volume of single-episode/one-off documentaries, they continue to make up over half of this type of production in the Canadian content production market. This is because the production of single-episode/one-off content has declined across all genres, not just for documentaries. Feature-length documentaries represent a relatively small share of the Canadian feature-length production sector, and have remained steady since 2019/20, accounting for an annual average of 6% of the total production volume of features (Table 2) and 17% of the total number of Canadian feature-length productions.

Table 3 - Total Number of Projects of Canadian Independent Documentary Production by Type: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	153	187	278	285	300
Single-episode/One-off	176	138	155	142	82
Feature-length (film or TV)	57	39	96	78	61
Total	386	374	529	505	443

Source: Nordicity estimates based on data from CAVCO

Table 4 - Share of Documentary Relative to Total Number of Projects of All Canadian Content Production by Type: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	22%	31%	30%	33%	40%
Single-episode/One-off	61%	68%	59%	55%	53%
Feature-length (film or TV)	18%	13%	23%	16%	17%

Source: Nordicity estimates based on data from CAVCO

Similar to total production volume and number of productions, the number of documentary hours produced saw a slight decline in 2023/2024.

Table 5 - Total Hours Produced of Canadian Independent Documentary Production by Type: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	826	1,099	1,659	1,592	1,564
Single-episode/One-off	162	131	159	140	83
Feature-length (film or TV)	73	57	149	114	85
Total	1,062	1,287	1,967	1,846	1,732

Source: Nordicity estimates based on data from CAVCO

Between fiscal years 2019/20 and 2023/24, there has also been a significant drop in the number of jobs created in single-episode/one-off documentary production. Despite fluctuations due to the pandemic and industry recovery, the number of full-time equivalent (FTE) direct and spin-off jobs created fell from 1,080 to 500 for single-episode/one-off documentary production.

The total employment impact for documentary series on the other hand increased from 3,620 in 2019/20 to 4,990 in 2023/24, with direct FTEs increasing from 1,780 in 2019/20 to 2,650 in 2023/24.

Table 6 - Total Employment Impact (Direct and Spinoff Jobs) by Documentary Type: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	3,620	4,090	5,670	5,650	4,990
Single-episode/One-off	1,080	690	720	840	500

Feature-length (film or TV)	510	340	1,100	850	670
Total	5,210	5,120	7,490	7,340	6,160

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2024

The combined direct employment impact of documentary production (all types) has surpassed pre-pandemic levels, despite a significant decline in 2023/24. Over the past five fiscal years, the number of direct FTEs supported by single-episode/one-off documentary production fell from 530 to 270 while other types of production have supported an increasing number of FTEs.

Table 7 - Total Direct Jobs in Independent Film and Television Production by Type: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	1,780	2,070	2,930	2,970	2,650
Single-episode/One-off	530	350	370	440	270
Feature-length (film or TV)	250	170	570	450	360
Total	2,560	2,590	3,870	3,860	3,280

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2024

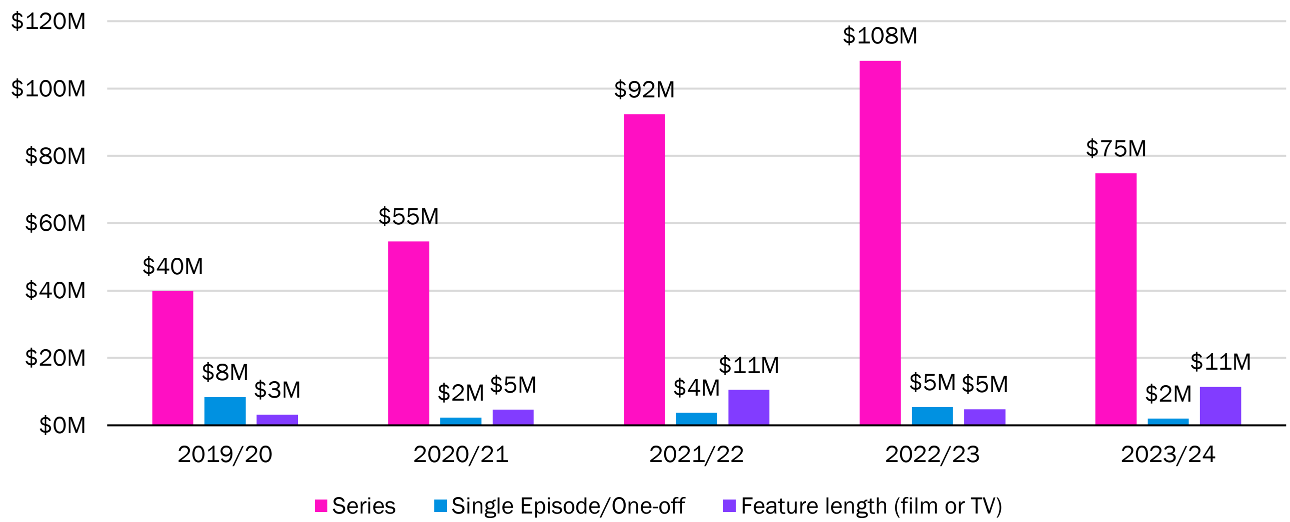
International financing of Canadian independent documentaries increased overall, from $51.4 million in 2019/20 to $88.2 million in 2023/24, with a peak of $118 million in fiscal year 2022/23. This trend was driven primarily by the increased foreign investment in documentary series (almost doubling in the five-year period). Foreign investment in feature-length (film or TV) while representing a smaller percentage overall increased by almost a fourfold from 2019/20 to 2023/24.

Table 8 – Foreign Investment in Canadian Independent Documentary Production by Type: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
Series	39.9	54.6	92.4	108.2	74.8
Single-episode/One-off	8.4	2.3	3.7	5.4	2.0
Feature-length (film or TV)	3.1	4.7	10.5	4.7	11.4
Total	51.4	61.6	106.6	118.4	88.2

Source: Nordicity estimates based on data from CAVCO

Figure 2 - Foreign Investment in Canadian Independent Documentary Production by Type: 2019/20 to 2023/24



Source: Nordicity estimates based on data from CAVCO

The independent documentary production sector in Canada contributed $540 million to Gross Domestic Product in 2023/24 through 6,160 direct, indirect, and induced jobs. Series production accounted for 81% of this total economic impact.

When compared to the previous edition of Getting Real, employment (FTEs), labour income and contribution to GDP increased considerably, even compared to pre-pandemic levels. These numbers indicate that the documentary industry continues to make a significant contribution to Canada's film and television industry, and Canada's economy more broadly.

Table 9 – Economic Impact of Documentary Production in Canada by Type: 2023/24

Impact	Indicator	Series	Single-episode / One-off	Feature-length (film or TV)	Total
Direct	Employment (FTEs)	2,650	270	360	3,280
Direct	Labour Income ($M)	219	22	29	270
Direct	GDP ($M)	227	23	31	280
Spin-off	Employment (FTEs)	2,340	230	310	2,880
Spin-off	Labour Income ($M)	146	15	20	180
Spin-off	GDP ($M)	210	21	28	260
Total	Employment (FTEs)	4,990	500	670	6,160
Total	Labour Income ($M)	364	37	49	450
Total	GDP ($M)	437	44	59	540

Source: Nordicity estimates based on data from CAVCO and CMPA Profile 2024

3.2. Feature-length (Film or TV) Documentary

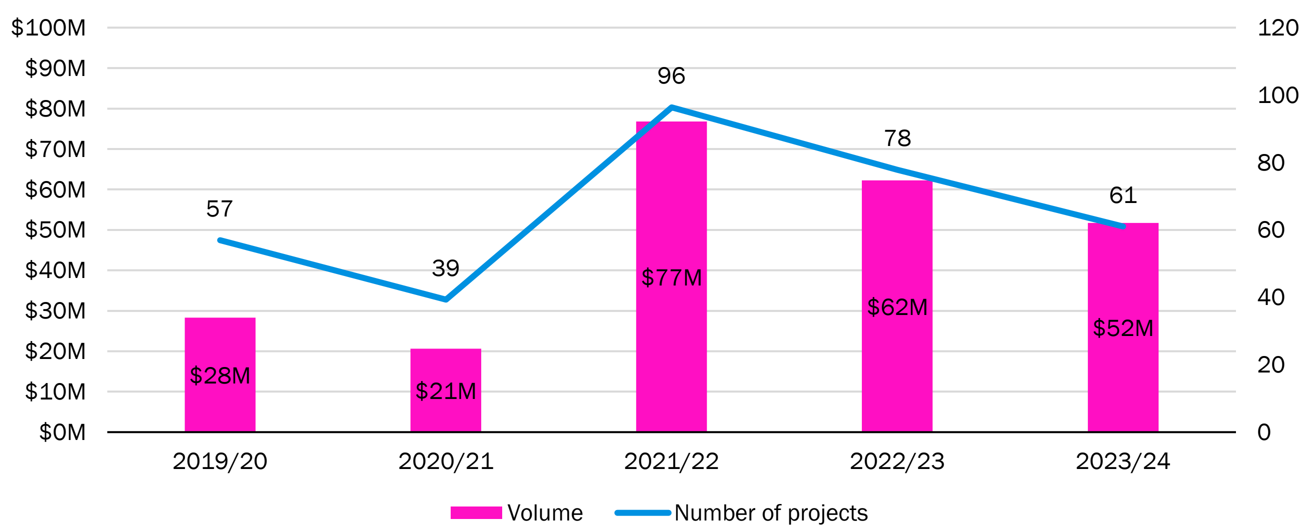
The total production volume of feature-length (film or TV) documentary production peaked at $77 million in 2021/22 following the pandemic period. Production volume then decreased to $52 million in 2023/24, although this level represents an 85% increase over the pre-pandemic year of 2019/20. The number of productions also peaked at 96 in 2021/22, decreasing to 61 in 2023/24. The total number of hours of documentary production decreased by half from 149 in 2021/22 to 85 in 2023/24.

Table 10 – Total Volume, Number of Projects and Hours Produced of Canadian Independent Documentary Feature-length (Film or TV) Production: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Volume ($M)	28	21	77	62	52
Productions	57	39	96	78	61
Hours	73	57	149	114	85

Source: Nordicity estimates based on data from CAVCO

Figure 3 - Total Volume and Number of Projects of Canadian Feature-length (Film or TV) Documentary Production: 2019/20 to 2023/24



Source: Nordicity estimates based on data from CAVCO

Feature-length documentary's share of all Canadian independent feature-length productions rose 9% in 2021/22 and fell to 6% in 2023/24. Similarly, feature-length documentary's percentage of total feature-length productions decreased by 6 percentage points between 2021/22 and 2023/24.

Table 11 – Feature-length (Film or TV) Documentary Share of all Canadian Independent Feature-Length Production: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
% of Production Volume	4%	3%	9%	6%	6%
% of Productions	18%	13%	23%	16%	17%

Source: Nordicity estimates based on data from CAVCO

The production volume of English-language feature-length documentary decreased by about 34% from $62 million in 2021/22 to $41 million in 2023/24. The French-language production volume decreased to $10 million in 2023/24, on par with the 2019/20 pre-pandemic production volume. The combined English and French-language markets peaked in 2021/22 and then declined by 32% from 2021/22 to 2023/24.

Table 12 – Total Volume of English- and French-language Feature-length Documentary Production: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
English-language	19	15	62	49	41
French-language	10	6	15	13	10
Total	28	21	77	62	52

Source: Nordicity estimates based on data from CAVCO

Documentary production is present across all regions of Canada. Except for 2021/22, the majority of English-language feature-length documentary production is recorded in Ontario. From 2020/21 to 2021/22 Ontario's English-language feature-length documentary production volume increased dramatically from $7 million to $25 million. This level was maintained in 2022/23, dropping to $19 million in 2023/24. Quebec English-language feature-length production follows a similar pattern to Ontario. The remaining provinces and territories also peaked in 2021/22 at $26 million, then declined to $13 million in 2022/23.

Table 13 - Total Volume of Production of English-language Feature-length (Film or TV) Documentaries by Region: 2019/20 to 2023/24 ($M)[21]

	2019/20	2020/21	2021/22	2022/23	2023/24
Ontario	9	7	25	25	19
Quebec	4	3	12	11	11
Other Prov. & Terr.	6	5	26	13	11
Total	19	15	62	49	41

Source: Nordicity estimates based on data from CAVCO

[21] Other language feature length projects are combined with English language productions due to low data issues.

3.3. Single-episode/One-off Documentaries

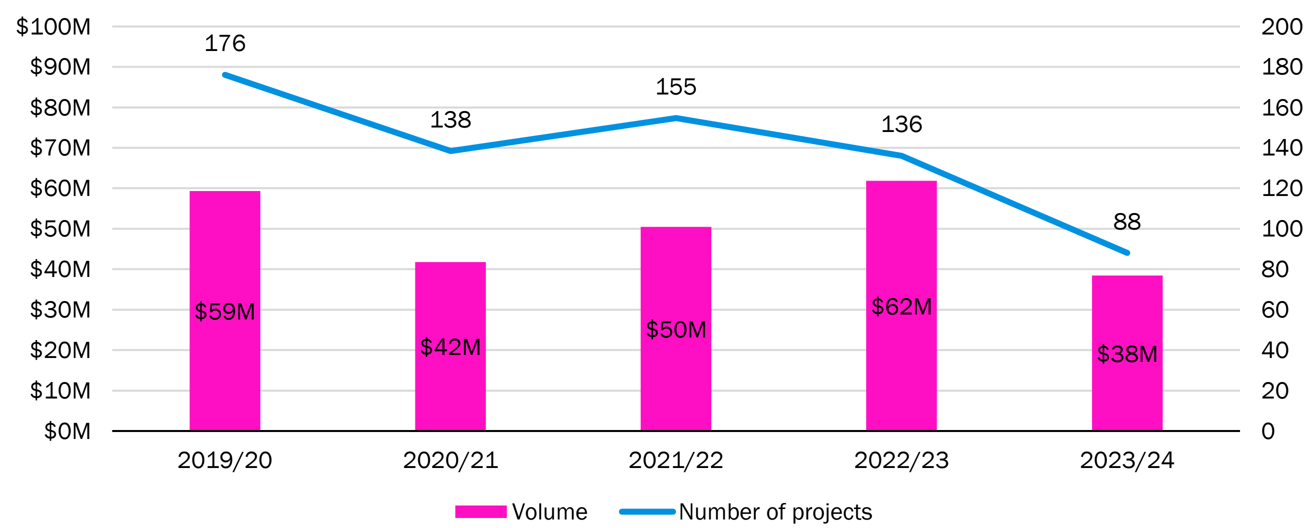
Single-episode/one-off documentaries have decreased from 2019/20 to 2023/24. Unlike feature-length documentaries, single-episode/one-off documentaries peaked in 2019/20 and have continued to decrease in terms of production volume, the number of total productions, and the number of total hours. Within the five-year time period, production volume decreased by approximately 36% from $59 million to $38 million. The total number of productions fell by 50% from 176 to 88, while the total number of hours produced fell by approximately 46%.

Table 14 - Total Volume, Number of Projects and Hours Produced of Canadian Independent Single-episode/One-off Documentary Production: 2019/20 to 2023/24[22]

	2019/20	2020/21	2021/22	2022/23	2023/24
Volume ($M)	59	42	50	63	37
Productions	176	138	155	126	88
Hours	162	131	159	136	87

Source: Nordicity estimates based on data from CAVCO

Figure 4 - Total Volume and Number of Projects of Canadian Single-episode/One-off Documentary Production: 2019/20 to 2023/24



Source: Nordicity estimates based on data from CAVCO

Between 2019/20 and 2023/24, documentary's share of the total single-episode/one-off production volume fell dramatically, from 56% to 37%. This observation may prove to be an exception for fiscal year 2023/24 as documentary accounted for at least half of the total single-episode/one-off production volume

[22] For single-episode/one-off documentaries, fiscal years 2022/23 and 2023/24 were merged for Atlantic Canada productions due to low data issues. Nordicity distributed the corresponding volume, number of productions and hours equally between the two fiscal years.

in the four other years under review. None-the-less, the documentary share of the total number of single-episode/one-off projects has gradually declined over the review period, from 61% to 53% of all projects.

Table 15 – Single-episode/One-off Documentary Share of all Canadian Independent Single-episode/One-off Production: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
% of Volume	56%	50%	50%	55%	37%
% of Productions	61%	68%	59%	55%	53%

Source: Nordicity estimates based on data from CAVCO

Trends in each of the English and French-language markets for single-episode/one-off documentary production shifted over the past five years. French-language production remained fairly stable (with an overall upward trend), while English-language production experienced more fluctuations and a downward trend. English-language production captured 82% ($48 million) of the volume in 2029/20, and just 59% ($21 million) in 2023/24.

Table 16 - Total Volume of English- and French-language Single-episode/One-off Documentary Production: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
English-language	48	28	33	44	21
French-language	11	14	18	20	16
Total	59	42	50	63	37

Source: Nordicity estimates based on data from CAVCO

The total volume of English-language single-episode/one-off documentary production decreased across all regions from 2019/20 to 2023/24. Ontario was by far the region with the highest volume of English-language single-episode/one-off documentary production, with an average $17 million produced every year.

Table 17 - Total Volume of Production of English-language Single-episode/One-off Documentaries by Region: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
Atlantic Canada	4	2	2	2	2
British Columbia	9	3	10	7	3
Ontario	23	16	13	24	11
Prairie Provinces and Territories	3	3	4	4	3
Quebec	10	4	4	6	4
Total	48	28	33	44	21

Source: Nordicity estimates based on data from CAVCO

As expected, Quebec has the highest volume of production of French-language single-episode/one-off documentaries. Quebec's production volume increased steadily from 2019/20 to 2022/23; however, it decreased from $18 million to $14 million in 2023/24. Other provinces saw French-language production peak in 2021/22.

Table 18 - Total Volume of Production of French-language Single-episode/One-off Documentaries by Region: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
Quebec	10	12	14	18	14
Other	2	1	3	2	2
Total	11	14	18	20	16

Source: Nordicity estimates based on data from CAVCO

3.4. Documentary Series

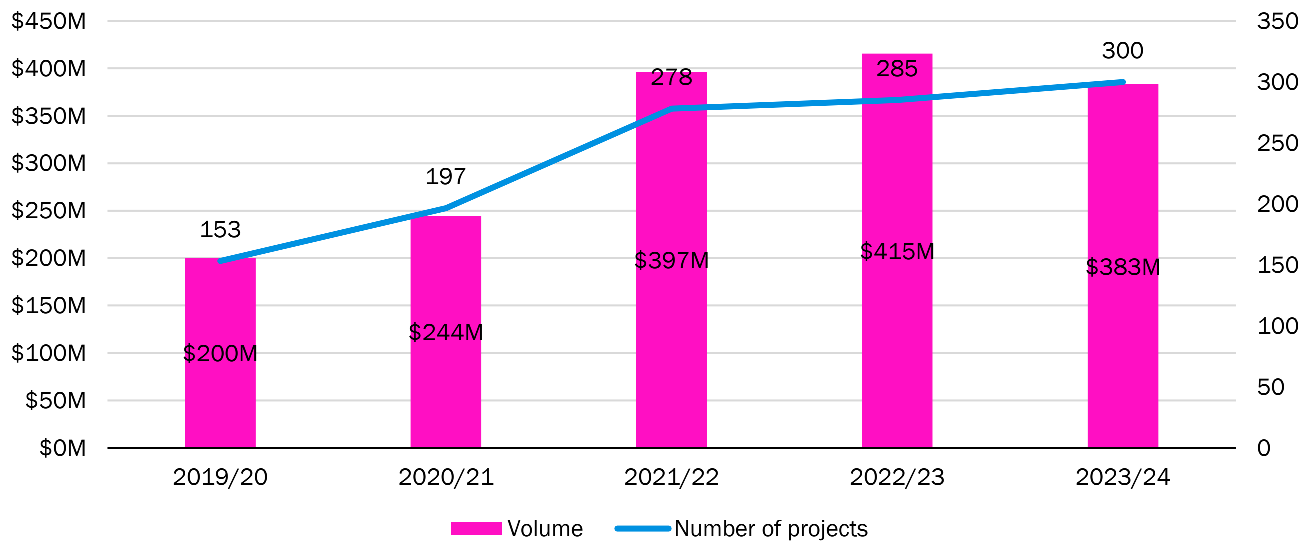
From 2019/20 to 2022/23, documentary series production volume more than doubled, from $200 million to $415 million; however, from 2022/23 to 2023/24 the production volume dropped by approximately 8%. The number of documentary series has steadily increased over the five-year period from 153 productions in 2019/20 to 300 in 2023/24. The number of hours of documentary series produced peaked in 2021/22 at 1,659 hours showing only a small decline since then.

Table 19 - Total Volume, Number of Projects and Hours Produced of Canadian Independent Documentary Series Production: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Volume ($M)	200	244	397	415	383
Productions	153	197	278	285	300
Hours	826	1,099	1,659	1,592	1.594

Source: Nordicity estimates based on data from CAVCO

Figure 5 - Total Volume and Number of Projects of Canadian Series Documentary Production: 2019/20 to 2023/24



Source: Nordicity estimates based on data from CAVCO

Documentary series consistently account for 14% of the total production volume of independent Canadian series since 2021/22. In terms of the number of documentary series, the share of documentary series grew from 22% in 2019/20 to 40% in 2023/24.

Table 20 - Documentary Series Share of all Canadian Independent Series Production: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
% of Production Volume	9%	13%	14%	14%	14%
% of Productions	22%	31%	30%	33%	40%

Source: Nordicity estimates based on data from CAVCO

The production volume of English-language documentary series increased significantly in the post-pandemic period increasing by close to 75% from 2020/21 to 2021/22. English-language series peaked at $341 million in 2022/2023 before decreasing to $291 million in 2023/24. Despite a decrease from 2021/22 to 2022/23, French-language documentary series had an upward trajectory from 2019/20 to 2023/2024, nearly doubling at $92 million in 2023/24.

Table 21 - Total Volume of English- and French-language Documentary Series Production: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
English-language	149	177	309	341	291
French-language	52	68	87	75	92
Total	200	244	397	415	383

Source: Nordicity estimates based on data from CAVCO

Ontario dominated English-language documentary series production over the five-year review period. Production volume in Ontario peaked in 2021/22 at $166 million, then decreased to $120 million in 2023/24. British Columbia's production volume peaked in 2021/22, declining slightly since. It represented roughly 18% of the total Canadian documentary series production over the five-year period. The Prairie provinces and Territories also represented nearly 18% of total documentary series production volume in Canada, although it peaked later $100 million in 2022/23, dropping to $58 million in 2023/24. Atlantic Canada saw consistent growth from the post-pandemic period, growing by nearly 67% from 2021/22 to 2023/24. Quebec's share of English-language documentary series peaked in 2021/22 and dropped since.

Table 22 - Total Volume of Production of English-language Documentary Series by Region: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
Atlantic Canada	7	16	18	29	30
British Columbia	41	28	55	48	48
Ontario	82	96	166	158	120
Prairie Provinces and Territories	13	24	63	100	58
Quebec		6	12	8	6
Total	149	177	309	341	291

Source: Nordicity estimates based on data from CAVCO

Quebec has consistently made up the vast majority of French-language documentary series production across the examined five-year period. After rebounding following the pandemic period and reaching $81 million in production volume in 2021/22. Following this increased, there was a decline the following year, dropping to $65 million and then rebounding back to $81 million in 2023/24. Other regions saw growth in French-language documentary series production volume, increasing from $5 million in 2019/22 to $11 million in 2023/24.

Table 23 - Total Volume of Production of French-language Documentary Series by Region: 2019/20 to 2023/24 ($M)

	2019/20	2020/21	2021/22	2022/23	2023/24
Quebec	47	59	81	65	81
Other	5	9	7	10	11
Total	52	68	87	75	92

Source: Nordicity estimates based on data from CAVCO

3.5. Summary of Findings

The Canadian independent documentary production sector is a strong contributor to the Canadian economy, with a total production volume of almost $2.1 billion for fiscal years 2019/20 through 2023/24.

Despite the industry-wide decline in production volume in 2020/21 as a result of the COVID-19 pandemic, documentary production increased in that year, and continued to do so for two more years, peaking in 2022/23. While there was a small decline in total production volume of documentary from 2022/23 to 2023/24, overall documentary production volume grew by approximately 65% between 2019/20 and 2023/24. The total number of hours produced increased by about 39% during this period, and the number of projects made increased by about 15%. While the pandemic may have impacted a few productions in March 2020, for the most part, the upward trend in the volume of documentary production has been consistent across the five-year review period.

Despite the recent decline in 2023/24, documentary production is still well above pre-pandemic levels, indicating a growing interest for this genre, largely driven by increased streaming viewership. Documentary series in particular have driven the overall growth of Canadian documentary production. During the five-year period under review, the production volume, the number of productions, and the number of hours of documentary series produced has doubled.

The independent Canadian documentary production sector contributed $540 million to the Canada's GDP in 2023/24 based on $472 million of direct production spending and through approximately 6,160 direct, indirect and induced jobs.

International financing of independent Canadian documentaries also increased overall, from $51.4 million in 2019/20 to $88.2 million in 2023/24. This trend was driven by documentary series, which consistently accounted for the largest shared of the independent Canadian documentary sector during the five-year period of this study. In contrast, despite an apparent boom in documentary production, single-episode/one-off documentaries experienced a decline between 2019/20 and 2023/24, with a dramatic almost 50% decline from 2022/23 to 2023/24.

4. Overview of Documentary Production Budgets

4.1. English-Language

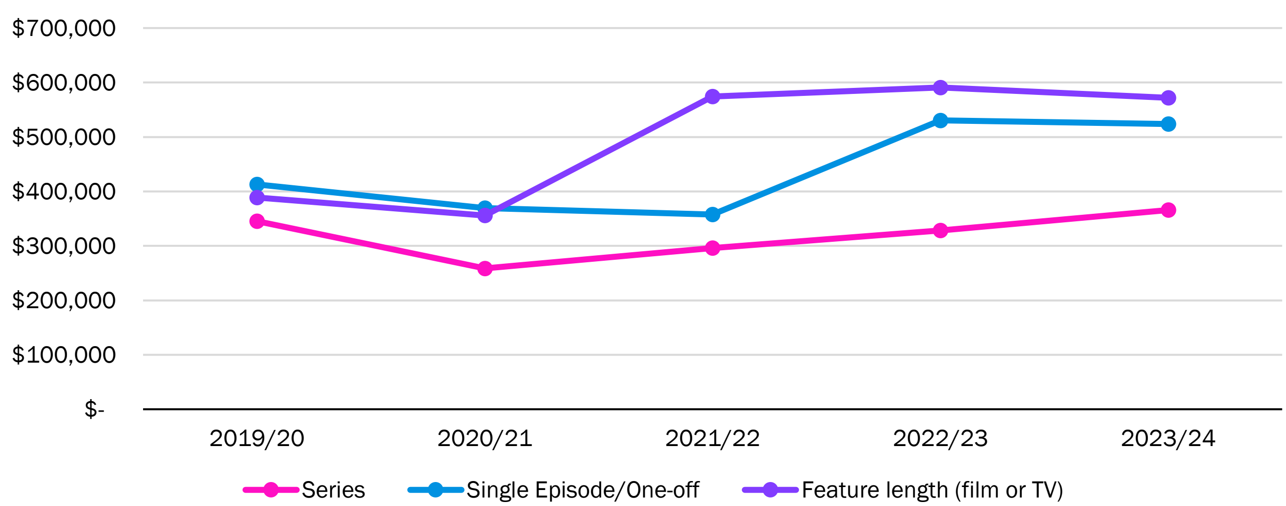
Average per-hour production budgets for English-language documentaries[23] fluctuated between 2019/20 and 2023/24. In the pandemic period, single-episode/one-offs had the highest average budgets per hour; however, starting in 2021/22 feature-length (film or TV) productions had the highest average budgets per hour. In 2023/24, the average per hour production budgets for feature-length (film or TV) was $572,074,[24] followed by single-episode/one-offs with an average of $523,897. Documentary series had significantly lower per-hour budgets, $365,752 in 2023/24, which may be a result of cost amortization.

Table 24 - Average Per-hour Budgets, All Documentary Types, English-language: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Feature-length (film or TV)	$388,857	$355,735	$574,315	$590,902	$572,074
Single-episode/One-off	$413,119	$369,145	$357,607	$530,462	$523,897
Series	$345,045	$258,683	$296,028	$328,009	$365,752

Source: CAVCO

Figure 6 - Average Per-hour Budgets, Documentary Film and Television, English-language: 2019/20 to 2023/24



Source: CAVCO

[23] Includes English-language documentary production and all other languages except French.

[24] Feature-length theatrical film budgets are typically higher, however, CAVCO's "feature-length (film or TV)" includes lower budget TV projects.

Over the examined five-year period, approximately 44% of English-language documentary series were within the $100,000 to $249,000 per-hour budget range. Approximately 31% had average per-hour budgets between $250,000 and $500,000.

Table 25 - Distribution by Budget Range of Per-hour Budgets, Documentary Series, English-language: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
<$100K	12%	7%	11%	7%	3%
$100K-$249K	33%	53%	47%	40%	47%
$250K-$500K	30%	32%	28%	34%	25%
>$500K	25%	8%	14%	18%	25%

Source: CAVCO

Data for single-episode and feature-length (film or TV) were combined due to low data issues.

Table 26 - Distribution by Budget Range of Per-hour Budgets, Other Documentary Types, English-language: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
<$100K	5%	12%	10%	6%	7%
$100K-$249K	28%	34%	28%	20%	17%
$250K-$500K	33%	29%	28%	25%	25%
>$500K	33%	25%	34%	50%	51%

Source: CAVCO

4.2. French-Language

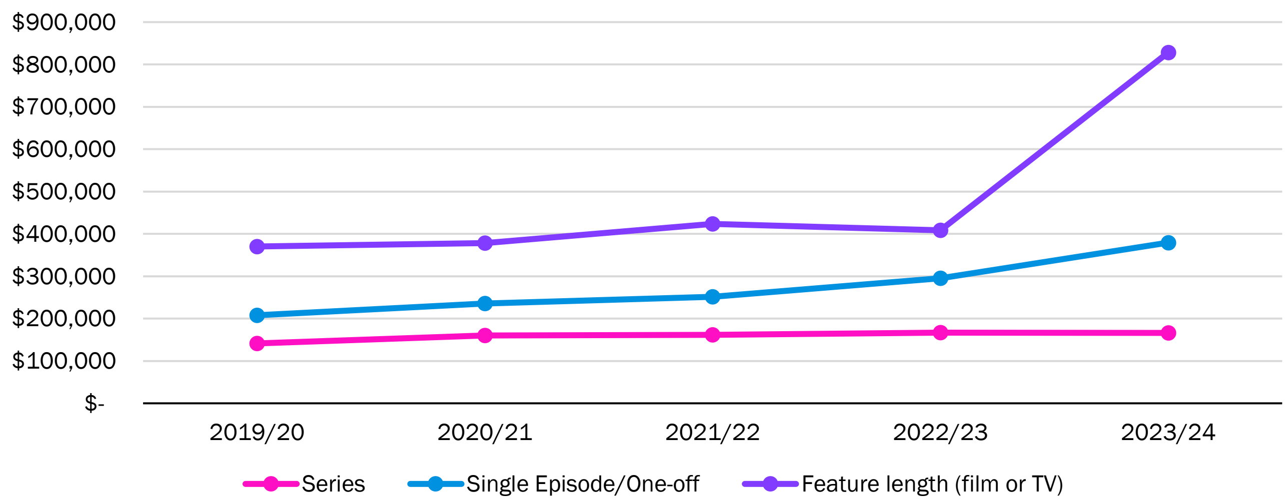
Between 2019/20 and 2023/24, feature-length projects had the highest budgets per hour of all French-language types of documentary production. French feature-length average per-hour budgets grew significantly from $370,256 in 2019/20 to $828,210 in 2023/24; however, this is likely due to outlier data in the last fiscal year. Single-episode documentaries had the second highest per-hour budget at $379,314 in 2023/24. Similar to English-language productions, series had the lowest average per-hour budgets at $166,490 in 2023/24.

Table 27 - Average Per-hour Budgets, All Documentary Types, French-language: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
Feature-length (film or TV)	$370,256	$378,239	$423,655	$408,301	$828,210
Single-episode/One-off	$207,860	$235,505	$251,114	$295,197	$379,314
Series	$141,111	$160,242	$161,785	$166,822	$166,490

Source: CAVCO

Figure 7 - Average Per-hour Budgets, Documentary Film and Television, French-language: 2019/20 to 2023/24



Source: CAVCO

Across all documentary types, the majority of French-language per hour budgets were within the $100,000 to $249,000 range. Data was not available by type for French-language production.

Table 28 - Distribution by Budget Range of Per-hour Budgets, All Documentary Types, French-language: 2019/20 to 2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24
<$100K	9%	7%	8%	4%	7%
$100K-$249K	68%	75%	65%	68%	68%
$250K-$500K	18%	14%	22%	21%	20%
>$500K	4%	4%	4%	7%	6%

Source: CAVCO

4.3. Summary of Findings

Average per-hour production budgets for English-language documentaries fluctuated between 2019/20 and 2023/24. Single-episode/one-off documentaries had the highest per-hour average budgets for all types of English-language productions in fiscal years 2019/20 and 2020/21, and since 2021/22, feature length documentaries have recorded the highest per-hour average budgets.

In 2023/24, average per-hour production budgets for English-language feature-length (film or TV) documentaries were $572,074, followed by single-episode/one-offs with an average of $523,897. Documentary series had significantly lower per-hour average budgets, at only $365,752 in 2023/24.

Between 2019/20 and 2023/24, the average per-hour budgets increased across all types of French-language productions. Feature-length productions had the highest per-hour average budgets of all types of French-language productions. Single-episode documentaries recorded the second highest per-hour budgets, with an average of $379,314 in 2023/24. Similar to English-language productions, French-language series had the lowest average per-hour budgets ranging from a low of $141,111 in 2019/20 to a high of $166,822 in 2022/23.

5. Financing of Documentary Production

5.1. Overview of Financing

Data from CAVCO provides insight into the level of funding being provided to documentary production through various sources. From 2019/20 to 2023/24, the largest share of financing for English-language documentary (all types) was provincial tax credits ($319.4 million), followed by Canadian distributors ($229.4 million), the Canada Media Fund ($206.1 million), private Canadian broadcasters ($199,1 million), foreign sources ($176.7 million), and the federal tax credits ($159.6 million). The variation in the investment by private Canadian broadcasters is related to the production slowdown during the pandemic, and regulatory relief by the CRTC, which allowed private broadcasters to underspend on their Canadian programme expenditure obligations as long as all spending was completed by August 2023.

Provincial tax credits consistently account for approximately 20%, and federal tax credits for 10% of investment in English-language documentary. Contributions from the CMF have decreased in relative value (from 17% of budgets to 11% in 2023/24), despite the 11% ($40.3 million) nominal increase in funding.

Table 29- Financing of English-language Documentary Production (All Types): 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	31.3	15%	26.0	12%	45.7	11%	38.8	9%	57.3	16%
Public Canadian broadcaster	15.0	7%	16.4	7%	27.1	7%	22.4	5%	20.2	6%
Federal tax credit	20.3	9%	21.2	10%	40.7	10%	42.3	10%	35.1	10%
Provincial tax credit	41.0	19%	44.7	20%	78.8	19%	86.0	20%	68.9	19%
Production company	4.7	2%	3.8	2%	6.7	2%	5.9	1%	5.7	2%
Canadian distributor	24.4	11%	36.7	17%	54.0	13%	63.8	15%	50.5	14%
Foreign	22.5	10%	24.8	11%	45.6	11%	54.2	13%	29.6	8%
Canada Media Fund	36.4	17%	29.1	13%	50.5	13%	49.8	12%	40.3	11%
Other public*	9.6	4%	8.4	4%	17.7	4%	21.3	5%	17.1	5%

Other private **	10.6	5%	8.5	4%	37.3	9%	47.1	11%	30.2	9%
Total	215.8	100%	219.6	100%	404.3	100%	431.5	100%	355.0	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Overall financing of English-language television documentary treaty coproductions fluctuated between 2019/20 and 2023/24, peaking in 2022/23 at $56.6 million. Foreign sources contributed the highest share of financing (29%) over this five-year period, followed by provincial tax credits (20%), the Canada Media Fund (12%), and federal tax credits (10%).

Table 30 - Financing of English-language Television Documentary Treaty Coproduction: 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	0.2	1%	2.9	10%	0.5	3%	4.0	7%	2.3	7%
Public Canadian broadcaster	1.2	8%	0.4	2%	1.4	8%	3.2	6%	1.7	5%
Federal tax credit	1.5	10%	3.1	10%	1.9	10%	5.8	10%	2.7	8%
Provincial tax credit	3.2	21%	7.	24%	3.5	19%	11.4	20%	5.2	16%
Production company	0.6	4%	0.7	2%	0.6	3%	0.9	2%	1.0	3%
Canadian distributor	0.6	4%	2.2	7%	2.5	14%	3.6	6%	1.1	3%
Foreign	4.5	30%	8.3	28%	3.2	18%	16.0	28%	12.2	38%
Canada Media Fund	1.6	11%	4.	14%	3.4	19%	7.8	14%	2.1	6%
Other public*	0.3	2%	0.0	0%	0.3	2%	0.4	1%	1.4	4%
Other private **	1.1	8%	0.8	3%	0.9	5%	3.5	6%	2.3	7%
Total	14.8	100%	29.4	100%	18.2	100%	56.6	100%	32.1	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

In addition to the 43 English-language television documentary treaty coproductions presented in Table 30, 27 theatrical documentary treaty coproductions have been financed between 2019/20 and 2023/24 for a cumulative total production volume of $27.4 million.[25] Foreign investments accounted for 45% of total financing.

After two years of lower activity in 2019/20 and 2020/21 due to the pandemic, the overall financing for all types of French-language documentary production has increased from $72.2 million to reach $118.7 million in 2023/24. Over the five-year period, the largest share of financing came from private Canadian broadcasters (26%), followed by the Canada Media Fund (17%), provincial tax credits (17%), public broadcasters (14%), and federal tax credits (11%). In sharp contrast to English-language documentary production, there is close to no funding from foreign sources and Canadian distributors for French documentary productions. In some cases, this may be due to Canadian French-language broadcasters preferring highly localized productions, which can be challenging to sell internationally.

Table 31- Financing of French-language Documentary Production (All Types): 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	18.8	26%	26.2	30%	30.1	25%	26.7	25%	31.4	26%
Public Canadian broadcaster	9.7	13%	10.9	13%	15.9	13%	17.2	16%	16.3	14%
Federal tax credit	7.9	11%	9.3	11%	12.4	10%	11.4	11%	13.4	11%
Provincial tax credit	12.6	17%	14.4	17%	20.2	17%	18.6	17%	20.4	17%
Production company	2.2	3%	1.8	2%	4.3	4%	3.5	3%	2.1	2%
Canadian distributor	2.2	3%	1.7	2%	3.1	3%	1.7	2%	7.2	6%
Foreign	1.2	2%	0.0	0%	2.2	2%	0.2	0%	0.0	0%

[25] An annual breakdown of English-language theatrical documentary treaty coproductions was not available.

Canada Media Fund	11.8	16%	14.7	17%	17.7	15%	19.3	18%	23.5	20%
Other public*	4.2	6%	6.6	8%	10.3	9%	7.3	7%	3.5	3%
Other private **	1.3	2%	1.4	2%	3.5	3%	2.3	2%	0.8	1%
Total	72.2	100%	87.2	100%	119.6	100%	108.1	100%	118.7	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Overall financing of French-language documentary treaty coproductions (theatrical and television) remained low in the two years where data was available. Contributions declined 26% between 2019/20 and 2020/21. For French-language documentary coproductions, the Canada Media Fund (22%) contributed the largest share of financing, followed by private broadcasters (17%), foreign source (16%), provincial tax credits (15%), and federal tax credits (12%).

Table 32- Financing of French-language Documentary Treaty Coproduction: 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	0.5	7%	1.4	29%	The fiscal years 2021/22, 2022/23, and 2023/24 were not included due to low data issues					
Public Canadian broadcaster	0.4	6%	0.6	13%						
Federal tax credit	0.8	12%	0.6	12%						
Provincial tax credit	1.1	17%	0.7	14%						
Production company	0.4	7%	0.1	3%						
Canadian distributor	0.4	6%	0.0	0%						
Foreign	1.8	27%	0.1	1%						
Canada Media Fund	1.2	18%	1.4	28%						

Other public*	0.0	0%	0.0	0%
Other private **	0.0	0%	0.0	0%
Total	6.6	100%	4.9	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

Among the 16 French-language documentary treaty coproductions presented in Table 32, 6 theatrical documentary treaty coproductions have been financed between 2019/20 and 2023/24 for a cumulative $3 million.[26] Foreign investments accounted for 49% of this total.

The median per-hour license fee for English-language documentary productions fluctuated during the review period. Feature-length documentaries license fees have increased following the pandemic period, growing from $63,209 in 2021/22 to $79,261 in 2023/24. Single-episode/one-offs saw a per-hour license high of $100,000 in 2019/20 and 2022/23, and ultimately a small decline to $95,506 in 2023/24. Following a high of $76,401 in 2019/20 series license fees decreased in 2020/21 by 31%, then rose steadily reaching $70,769 in 2023/24.

Table 33 - Documentary Median License Fees Per-hour by Type, English-language

	2019/20	2020/21	2021/22	2022/23	2023/24
Feature-length (film or TV)	$55,804	$34,211	$63,209	$70,400	$79,261
Single-episode/One-off	$100,000	$68,323	$85,000	$100,000	$95,506
Series	$76,401	$52,927	$56,904	$67,889	$70,769

Source: CAVCO

Similarly, French-language documentary median license fees per-hour also fluctuated. Feature-length documentary fell from $49,977 in 2019/20 to $25,109 in 2020/21, however recovered to $50,430 in 2021/22 and decreased to $48,750 in 2023/24. Single-episode license fees saw consistent growth, rising from $72,661 in 2019/20 to $85,000 in 2022/23 and 2023/24. Documentary series license fees increased from $63,477 in 2019/20 to $80,344 in 2022/23, however decreased in 2023/24 to $71,151.

[26] An annual breakdown of English-language theatrical documentary treaty coproductions was not available.

Table 34 - Documentary Median License Fees Per-hour by Type, French-language

	2019/20	2020/21	2021/22	2022/23	2023/24
Feature-length (film or TV)	$49,977	$25,109	$50,430	$50,000	$48,750
Single-episode/One-off	$72,661	$75,173	$80,000	$85,000	$85,000
Series	$63,477	$75,219	$71,136	$80,344	$71,151

Source: CAVCO

Between 2019/20 and 2023/24, provincial tax credits accounted for the larger share of total documentary tax credit contributions, making up roughly 65%. Overall combined tax credit financing has increased. In 2019/20 total contributions were $81.9 million and reached a peak in 2022/23 at $158.3, before dropping to $137.7 million in 2023/24. These trends remain true across the English-language market (Table 36) reaching total contributions of $104 million in 2023/24. The French-language market did not experience a decrease in total tax credit contributions in 2022/23 and rebounded in 2023/24 to $33.8 million (Table 37).

Table 35 - Total Contributions of Producer Tax Credits ($ millions)

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Total federal tax credit	28.3	35%	30.5	34%	53.1	35%	53.7	34%	48.5	35%
Total provincial tax credit	53.6	65%	59.2	66%	99.0	65%	104.6	66%	89.3	65%
Combined financing	81.9	100%	89.7	100%	152.0	100%	158.3	100%	137.7	100%

Source: CAVCO

Table 36 - Total Contributions of Producer Tax Credits, English-language ($ millions)

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Total federal tax credit	20.3	33%	21.2	32%	40.7	34%	42.3	33%	35.1	34%
Total provincial tax credit	41.0	67%	44.7	68%	78.8	66%	86.0	67%	68.9	66%
Combined financing	61.3	100%	65.9	100%	119.5	100%	128.3	100%	104.0	100%

Source: CAVCO

Table 37 - Total Contributions of Producer Tax Credits, French-language ($ millions)

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Total federal tax credit	7.9	39%	9.3	39%	12.4	38%	11.4	38%	13.4	40%
Total provincial tax credit	12.6	61%	14.4	61%	20.2	62%	18.6	62%	20.4	60%
Combined financing	20.6	100%	23.7	100%	32.5	100%	30.0	100%	33.8	100%

Source: CAVCO

5.2. Feature-length (Film or TV) Documentaries

The financing structure of English-language feature-length (film or TV) documentary productions has shifted as average budgets have increased. As CMF and other public funding sources (NFB, Telefilm, provincial equity funds, etc.) account for a smaller share of the total budgets, productions rely more heavily on federal and provincial tax credits. Similarly, while investments from production companies have decreased, foreign contributions and advances from Canadian distributors now cover a larger share of the total budget of feature-length documentaries.

Table 38 - Financing for English-language Feature-length (film or TV) Documentary Production: 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	0.7	4%	1.3	9%	3.4	5%	2.2	4%	2.2	5%
Public Canadian broadcaster	1.3	7%	0.3	2%	2.0	3%	3.1	6%	2.1	5%
Federal tax credit	1.4	7%	1.4	10%	5.6	9%	3.7	8%	3.6	9%
Provincial tax credit	2.9	16%	2.7	18%	11.6	19%	10.2	21%	8.6	21%
Production company	0.8	4%	0.2	2%	1.4	2%	0.6	1%	0.2	1%
Canadian distributor	0.6	3%	3.6	25%	4.1	7%	2.4	5%	3.5	8%
Foreign	0.4	2%	0.3	2%	4.1	7%	1.2	2%	3.9	10%
Canada Media Fund	4.8	26%	2.2	15%	9.1	15%	12.4	25%	8.7	21%
Other public*	2.9	16%	0.4	2%	6.0	10%	5.6	11%	4.5	11%
Other private **	2.9	15%	2.3	15%	14.8	24%	7.6	16%	4.0	10%
Total	18.7	100%	14.6	100%	62.1	100%	48.8	100%	41.2	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

The financing structure of French-language feature-length documentary is more difficult to analyze as it fluctuated significantly over the five-year period. The primary sources of financing were Telefilm, NFB, and provincial agencies (Other public in Table 39), with 23% of the total funding between 2019/20 and 2023/24. Provincial tax credits were the second source at 20%, Canadian distributors accounted for 19% of the total financing over the past five fiscal years. In 2022/23 and 2023/24 the CMF contribution has increased significantly to 19% and 15% respectively.

Table 39 - Financing of French-language Feature-length (film or TV) Documentary Production

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	0.1	1%	0.2	4%	0.6	4%	0.4	3%	0.5	5%
Public Canadian broadcaster	0.5	5%	0.0	0%	0.3	2%	0.5	4%	0.0	0%
Federal tax credit	0.7	7%	0.3	5%	0.7	5%	0.9	7%	1.0	9%
Provincial tax credit	2.1	22%	0.8	14%	2.8	19%	2.3	20%	2.5	24%
Production company	0.6	6%	0.1	2%	0.5	4%	0.7	6%	0.1	1%
Canadian distributor	2.1	21%	0.8	14%	2.2	15%	1.2	10%	4.0	38%
Foreign	0.0	0%	0.0	0%	0.0	0%	0.0	0%	0.0	0%
Canada Media Fund	0.2	2%	0.2	3%	0.3	2%	2.1	19%	1.6	15%
Other public*	2.8	29%	0.7	11%	5.4	37%	2.3	20%	0.7	7%
Other private **	0.7	7%	0.4	7%	1.8	12%	1.2	10%	0.1	1%
Total	9.6	100%	6.0	58%	14.7	100%	13.5	100%	10.5	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

About half of the total license fees spent on English-language feature-length documentary in 2022/23 and 2023/24 were distributed to projects with an hourly budget greater than $500,000.

Table 40 - Distribution of English-language Feature-length (film or TV) Documentary License Fees by Budget Range (per hour)

	2019/20	2020/21	2021/22	2022/23	2023/24
<$100K	9.4%	20.0%	8.1%	4.3%	5.1%
$100K-$249K	18.8%	32.0%	22.6%	10.6%	17.9%
$250K-$500K	37.5%	28.0%	29.0%	29.8%	28.2%
>$500K	34.4%	20.0%	40.3%	55.3%	48.7%

Source: CAVCO

The distribution of license fees for French-language feature-film documentary was not available due to low data issues.

5.3. Single-episode/One-off Documentaries

Overall, financing for English-language single-episode/one-off documentaries has decreased between 2019/20 and 2023/24, falling from $48.4 million to $22.7 million. In this challenging context, public funding acts as a lifeline: the most significant portion of financing came from the Canada Media Fund, despite almost halving its nominal contribution over the five-year period.

Table 41 - Financing for English-language Single-episode/One-off Documentary Production: 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	3.9	8%	1.9	7%	3.5	11%	1.8	4%	2.5	11%
Public Canadian broadcaster	5.0	10%	3.0	11%	3.8	12%	4.9	12%	3.1	14%
Federal tax credit	4.3	9%	2.5	9%	2.9	9%	3.5	8%	2.1	9%
Provincial tax credit	7.9	16%	4.8	17%	5.7	17%	6.5	15%	3.9	17%
Production company	1.9	4%	1.2	4%	0.9	3%	0.8	2%	0.9	4%
Canadian distributor	4.8	10%	1.8	6%	1.7	5%	4.5	11%	0.4	2%
Foreign	2.9	6%	2.1	7%	0.6	2%	2.2	5%	0.3	1%
Canada Media Fund	13.9	29%	8.3	29%	9.2	28%	11.6	28%	7.4	33%
Other public*	2.4	5%	1.7	6%	2.4	7%	3.6	9%	0.9	4%
Other private **	1.5	3%	1.2	4%	2.3	7%	2.6	6%	1.2	5%
Total	48.4	100%	28.2	100%	32.9	100%	42.0	100%	22.7	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

However, French-language single-episode/one-off documentary production saw an increase in production volume. Canada Media fund remained a key partner while private and public broadcasters now account for a smaller share of the total financing.

Table 42 - Financing for French-language Single-episode/One-off Documentary Production: 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	1.2	11%	1.7	13%	2.1	12%	1.8	9%	1.2	8%
Public Canadian broadcaster	2.7	25%	3.9	29%	4.0	23%	3.9	20%	2.2	14%
Federal tax credit	1.2	11%	1.7	13%	1.8	10%	1.8	9%	1.4	9%
Provincial tax credit	2.3	21%	3.2	23%	3.4	19%	3.8	19%	3.2	20%
Production company	0.3	3%	0.4	3%	0.5	3%	0.7	4%	0.2	2%
Canadian distributor	0.1	1%	0.0	0%	0.2	1%	0.3	1%	1.6	10%
Foreign	0.0	0%	0.0	0%	0.0	0%	0.2	1%	0.0	0%
Canada Media Fund	2.3	21%	3.8	28%	3.8	22%	4.4	22%	4.0	25%
Other public*	0.5	5%	1.5	11%	1.6	9%	2.4	12%	1.8	11%
Other private **	0.3	3%	0.4	3%	0.2	1%	0.5	2%	0.0	0%
Total	10.9	100%	13.6	122%	17.6	100%	19.8	100%	15.8	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

English-language single-episode/one-off documentary productions with an hourly budget over $500,000 concentrated an increasing share of license fees distribution (from 29.3% to 55.9%).

Table 43 - Distribution of English-language Single-episode/One-off Documentary License Fees by Budget Range (per hour)

	2019/20	2020/21	2021/22	2022/23	2023/24
<$100K	3.4%	8.2%	9.1%	5.7%	8.8%
$100K-$249K	27.6%	31.5%	35.2%	22.9%	14.7%
$250K-$500K	39.7%	37.0%	31.8%	34.3%	20.6%
>$500K	29.3%	23.3%	23.9%	37.1%	55.9%

Source: CAVCO

The distribution of license fees for French-language single-episode/one-off documentary was not available due to low data issues.

5.4. Documentary Series

While 2019/20 saw funding drop to pre-2017/18 levels, English-language documentary series production rebounded significantly in 2021/22, higher than the 2018/19 total. Provincial tax credits have consistently been the highest source of funding across the entire period, with Canadian distributors and private Canadian broadcasters both also contributing a significant share. Foreign investment has fluctuated, with a notable high of $51.2 million in 2022/23, accounting for 15% of the financing that year.

Table 44 - Financing for English-language Documentary Series Production: 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	27.1	18%	23.0	13%	38.8	13%	35.1	10%	53.2	18%
Public Canadian broadcaster	8.5	6%	13.0	7%	21.0	7%	13.9	4%	14.7	5%
Federal tax credit	14.7	10%	17.3	10%	32.3	10%	35.2	10%	29.4	10%
Provincial tax credit	30.3	20%	37.3	21%	61.6	20%	69.6	20%	56.5	19%
Production company	1.9	1%	2.3	1%	4.4	1%	4.4	1%	4.5	2%
Canadian distributor	19.1	13%	31.5	18%	48.4	16%	57.0	17%	47.3	16%
Foreign	19.5	13%	22.6	13%	41.3	13%	51.2	15%	25.7	9%
Canada Media Fund	17.1	11%	18.3	10%	31.5	10%	25.0	7%	23.0	8%
Other public*	4.2	3%	6.3	4%	9.3	3%	12.0	4%	11.6	4%
Other private **	6.4	4%	5.1	3%	20.5	7%	37.2	11%	25.0	9%
Total	148.7	100%	176.7	100%	309.2	100%	340.7	100%	291.0	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

The volume of French-language documentary series production also increased dramatically (+79% between 2019/20 and 2023/24). Private Canadian broadcasters accounted for a significant 35% of all financing over the five-year period, almost double the cumulated contribution of CMF, the second most important source of financing at 18%. Canadian distributors and foreign investment both accounted for less than 1% of the total financing between 2019/20 and 2023/24.

Table 45 - Financing for French-language Documentary Series Production: 2019/20 to 2023/24

	2019/20	2019/20	2020/21	2020/21	2021/22	2021/22	2022/23	2022/23	2023/24	2023/24
	$M	%	$M	%	$M	%	$M	%	$M	%
Private Canadian broadcaster	17.5	34%	31.3	46%	27.6	32%	24.5	33%	29.6	32%
Public Canadian broadcaster	6.6	13%	10.0	15%	11.8	14%	12.8	17%	14.0	15%
Federal tax credit	6.1	12%	9.6	14%	10.0	11%	8.6	11%	11.0	12%
Provincial tax credit	8.3	16%	13.5	20%	14.0	16%	12.1	16%	14.7	16%
Production company	1.3	3%	1.8	3%	3.2	4%	2.0	3%	1.8	2%
Canadian distributor	0.1	0%	0.5	1%	0.5	1%	0.0	0%	1.8	2%
Foreign	1.2	2%	0.0	0%	2.2	2%	0.0	0%	0.0	0%
Canada Media Fund	9.4	18%	14.6	22%	13.7	16%	12.4	17%	17.9	19%
Other public*	0.9	2%	5.5	8%	3.0	3%	2.1	3%	1.1	1%
Other private **	0.3	1%	0.6	1%	1.4	2%	0.4	1%	0.6	1%
Total	51.7	100%	67.7	129%	87.3	100%	74.8	100%	92.4	100%

Source: Nordicity estimates based on data from CAVCO

*Other public includes NFB, Telefilm, provincial governments and other public agencies.

**Other private includes independent production funds, broadcaster equity and other private investors.

The majority of English-language documentary series license fees were concentrated in the $100,000 to 500,000 per-hour budget range, with the majority attributable to productions with hourly budgets between $100,000 and $249,000. Small productions with hourly budgets under $100,000 made up the smallest share of license fees. Share of license fees dropped between 2019/20 and 2020/21 for all budget ranges except the $100,000 to $24,000 range.

Table 46 - Distribution of English-language Documentary Series License Fees by Budget Range (per hour)

	2019/20	2020/21	2021/22	2022/23	2023/24
<$100K	11.6%	6.7%	11.1%	7.0%	3.4%
$100K-$249K	34.8%	53.3%	46.5%	39.9%	47.1%
$250K-$500K	29.0%	31.1%	28.5%	34.8%	25.2%
>$500K	24.6%	8.9%	13.9%	18.4%	24.4%

Source: CAVCO

As with the English-language documentary series, French-language documentary series license fees were also mostly distributed within the $100,000 to 500,000 per-hour range, with a higher percentage attributable to productions with hourly budgets within the $100,000 to 249,000 pe-hour range. However, a higher percentage of license fees were attributable to French-language productions with hourly budgets over $500,000 compared to English-language productions in the same budget range, which almost captured a third of license fee distribution in 2023/24.

Table 47 - Distribution of French-language Documentary Series License Fees by Budget Range (per hour)

	2019/20	2020/21	2021/22	2022/23	2023/24
<$100K	3.1%	4.2%	6.3%	2.8%	4.8%
$100K-$249K	51.9%	40.1%	35.7%	33.0%	31.7%
$250K-$500K	28.2%	24.9%	26.2%	40.4%	30.5%
>$500K	16.8%	30.8%	31.8%	23.7%	32.9%

Source: CAVCO

5.5. Summary of Findings

Data from CAVCO suggests that between 2019/20 and 2023/24 the largest share of Canadian documentary financing came from provincial tax credits ($405.5 million), followed by private Canadian broadcasters ($332.4 million), the Canada Media Fund ($293.1 million), and Canadian distributors ($245.3 million).

In 2023/24, provincial tax credits made up 19% of total financing, remaining stable over the five-year period. Similarly, private Canadian broadcasters doubled their contribution to documentary production over the past five years, now also making up 19% of total financing. The Canada Media fund continues to provide critical financing to the industry (approximately $64 million in 2023/24); however, its share of total financing dropped from 17% to 13% between 2019/20 and 2023/24.

The overall financing structure is marginally different when focusing on English-language production. Over the past five years, provincial tax credits remain the largest source of financing at 20% ($319 million), followed by Canadian distributors at 14% ($229 million), accounting for 14%. Finally, the Canada Media

Fund was the third largest contributor, investing $206 million into English-language documentary for a total 13% of the production budgets.

Despite fluctuations in financing between 2019/20 and 2021/22, the overall financing for all types of French-language documentary production has increased from $72.2 million to $118.7 million. Over the five-year period, the largest share of financing came from private Canadian broadcasters (26%), followed by the Canada Media Fund (17%) and provincial tax credits (17%). Notably, there is considerably less (or close to no) funding from foreign sources and Canadian distributors for French documentary productions. This may be due to French-language Canadian broadcasters preferring highly localized content, which is challenging to sell internationally.

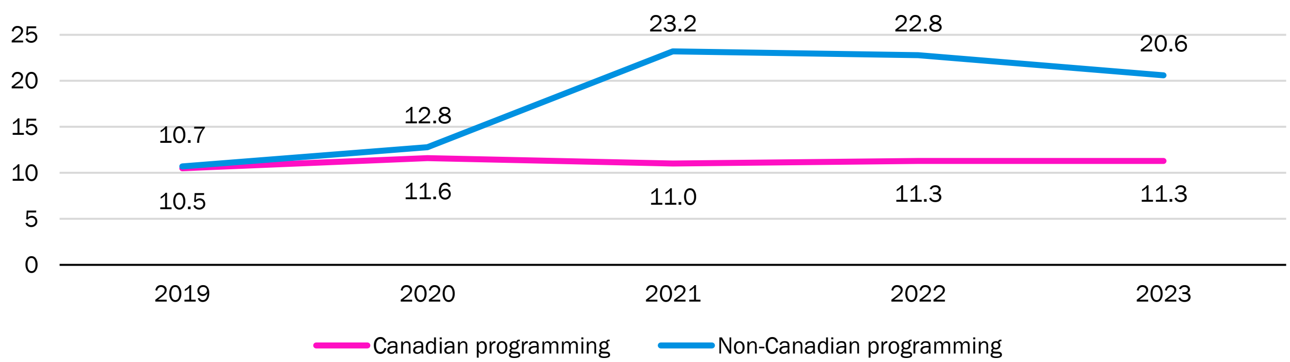
6. Audiences for Canadian Documentaries

6.1. Television Audiences

Average weekly viewing hours of non-Canadian documentary long-form documentary broadcast on English-language Canadian television grew during the pandemic (2020 to 2021), increasing from 12.8 million hours to 23.2 million hours. Weekly viewing hours for non-Canadian programming dropped slightly in the following year; however, it remains much higher than pre-pandemic levels, at 20.6 million hours in 2023 compared to 10.7 hours in 2019. This growth is likely a result of shifts in viewing habits and an increase in documentary content on streaming services.

In contrast, average weekly viewing hours of Canadian long-form documentary broadcast on English-language Canadian television did not see the same significant growth as non-Canadian programming. Weekly viewing of Canadian programming increased modestly from 10.5 in 2019 to a current average of 11.3 million hours per week since 2020.

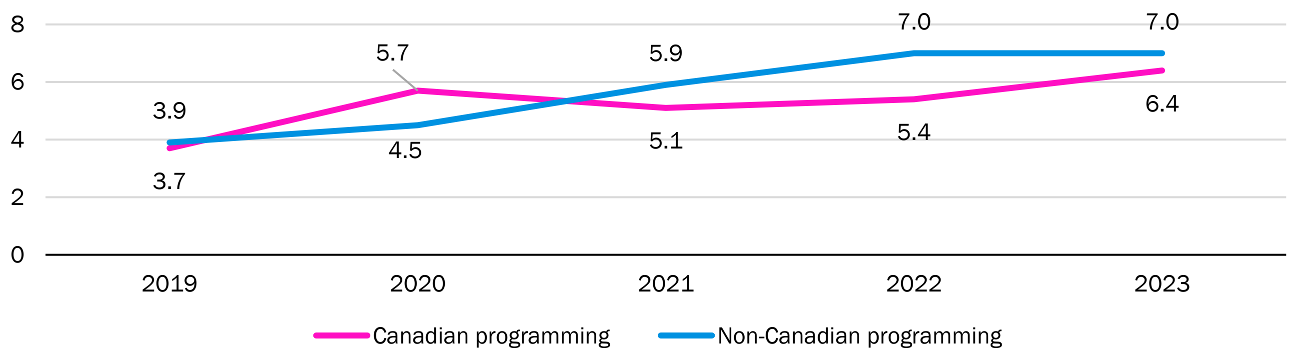
Figure 8 - Average weekly viewing hours (million) for Canadian programs broadcast by English-language Canadian television services, Long-form Documentary 2019-2023



Source: Numeris (Canadians 2+), CRTC Open Data TV-T6

The average weekly viewing hours for non-Canadian long-form documentary broadcast on French-language Canadian television has steadily increased from 3.9 million in 2019 to 7 million in 2023. The average weekly viewing hours for Canadian long-form documentary broadcast on French-language Canadian television has fluctuated over the five-year period, ultimately increasing from 3.7 million weekly viewing hours in 2019 to 6.4 million in 2023.

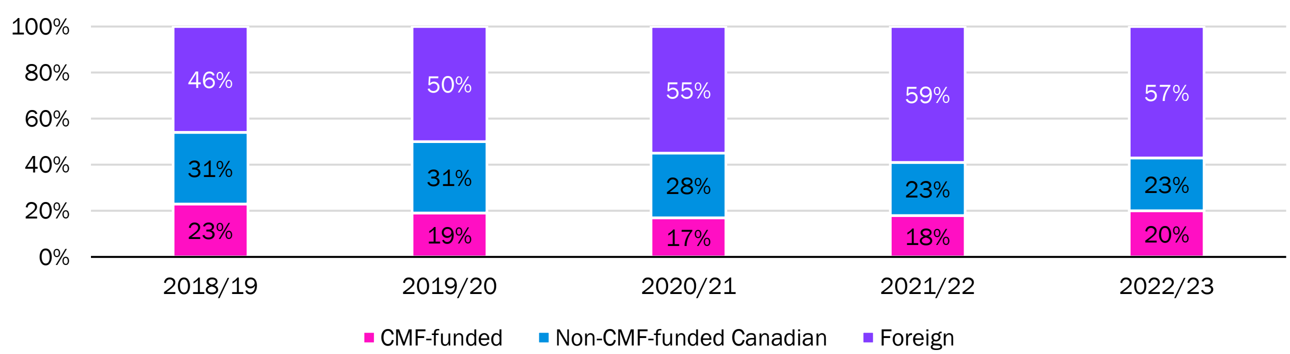
Figure 9 - Average weekly viewing hours (million) for Canadian programs broadcast by French-language Canadian television services, Long-form Documentary 2019-2023



Source: Numeris (Canadians 2+), CRTC Open Data TV-T6

The majority of documentary productions viewed on English-language Canadian television in a full day from 2018/2019 to 2022/23 were foreign, growing from 46% to 57%. Foreign content was followed by non-CMF-funded Canadian documentary programs representing an average of 27%, and CMF-funded programs representing an average of 19% over the five-year period.

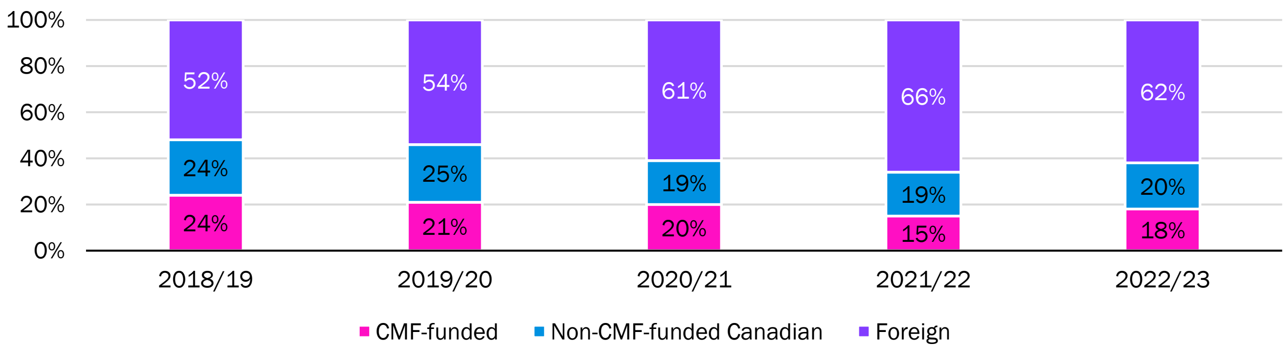
Figure 10 - Share of Full-Day Viewing of Documentaries Airing on English-language Television in Canada: 2018/19 to 2022/23



Source: Numeris and CMF

The share of peak hour viewing of documentaries airing on English-language television follows a similar trend to full-day viewing, with roughly 59% being foreign programs, 21% non-CMF-funded Canadian programs, and 20% CMF-funded programs.

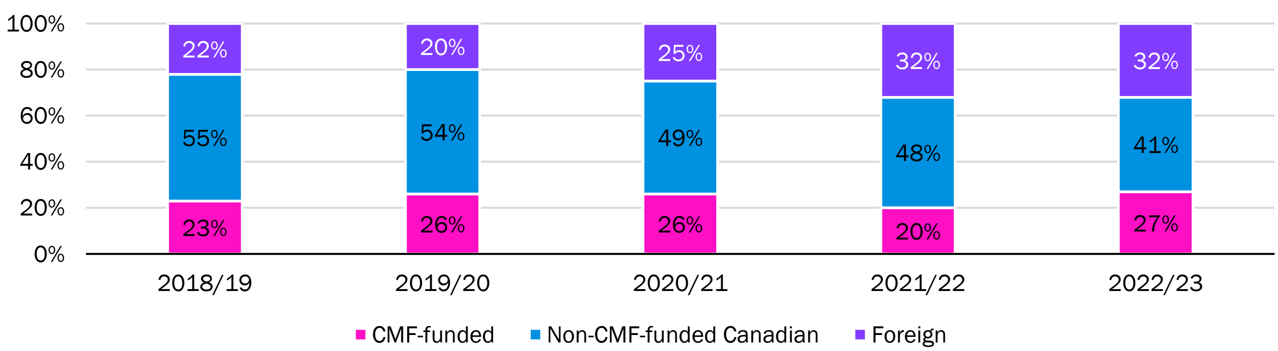
Figure 11 - Share of Peak Hours Viewing of Documentaries Airing on English-language Television in Canada: 2018/19 to 2022/23



Source: Numeris and CMF

The majority of documentary productions viewed on French-language television from 2018/19 to 2022/23 were non-CMF-funded Canadian programs representing 49%, followed by foreign programming, roughly 26%, and CMF-funded programming at 24%. Prior to 2021/22 CMF-funded programming represented a higher share of viewing hours than foreign programming.

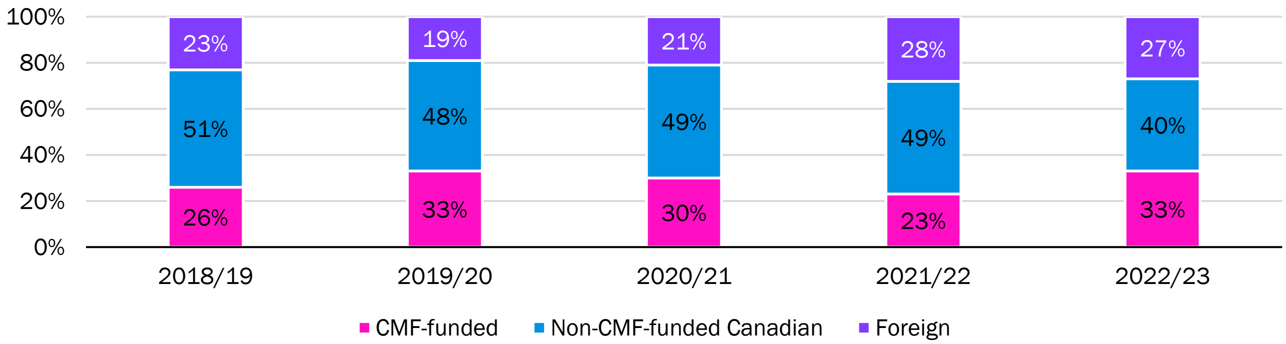
Figure 12 - Share of Full-Day Viewing of Documentaries Airing on French-language Television in Canada: 2018/19 to 2022/23



Source: Numeris and CMF

From 2018/19 to 2022/23 non-CMF-funded Canadian programming made up the majority of peak hour documentary viewing on French-language television at 47%. Differing from full-day French-language viewing, non-CMF-funded Canadian programming was followed by CMF-funded programming (29%), and foreign programming (24%).

Figure 13 - Share of Peak Hours Viewing of Documentaries Airing on French-language Television in Canada: 2018/19 to 2022/23



Source: Numeris and CMF

Television is the principal channel through which Canadian audiences discover and watch feature-film documentaries. In fact, among the 45% of movie watchers who like to watch documentary, 77% prefer to see them at home as opposed to only 3% who indicated a preference for movie theatres.[27] Canadian audiences also recognize the high-quality of documentary feature films. Documentary reached the second place in the ranking of perceived quality of various genres, just behind action films and before dramas and comedies.[28]

6.2. Theatrical Audiences

Canadian documentaries fared reasonably well at the box office in 2023, in spite of strong competition from films worldwide, particularly from the United States. Canadian-made documentaries accounted for half of the top ten documentaries exhibited in Canadian theatres; however, only one of those five films was primarily in English (Geographies of Solitude). Two of the other films were in French, one was in both French and in English, and one was in a combination of Spanish, English and Japanese.

[27] Telefilm Canada, ERM Research. *Canadian Movie Consumption Exploring the Health of Feature Film in Canada*. October 2023

[28] Ibid.

Table 48 - Top 10 Documentaries Exhibited in Canadian Theatres: 2023

Rank	Title	Country of Origin	Original Language
1	Renaissance: a film by Beyoncé	USA	English
2	Stop making sense (re-release)	USA	English
3	After death	USA	English
4	The glance of music / Ennio	Italy-Belgium-Netherlands-Japan-China-Germany	English-Italian
5	Le mythe de la femme noire	Canada	French
6	The colour of ink	Canada	Spanish-English-Japanese
7	L'océan vu du cœur	Canada	French-English
8	Jacques Parizeau et son pays imaginé	Canada	French
9	Joan Baez I am noise	USA	English
10	Geographies of solitude	Canada	English

Source: MTAC

The success of non-English Canadian documentaries is confirmed when looking at the top Canadian documentaries exhibited in Canadian theatres in 2023. While seven of the top ten documentaries were English, four of those were multilingual productions, and the three that were exclusively in English were among the bottom six. Canadian audiences appear to have a greater engagement with non-English-language documentary productions. Various factors may be at play including culturally or regionally based audience behaviour (more likely to attend the cinema), better marketing efforts to engage a specific audience, and demand from content from audiences in linguistic minority communities.

Table 49 - Top 10 Canadian Documentaries Exhibited in Canadian Theatres: 2023

Rank	Title	Country of Origin	Original Language
1	Le mythe de la femme noire	Canada	French
2	The colour of ink	Canada	Spanish-English-Japanese
3	L'océan vu du cœur	Canada	French-English
4	Jacques Parizeau et son pays imaginé	Canada	French
5	Geographies of solitude	Canada	English
6	Jacques	Canada	French
7	Satan wants you	Canada	English
8	Rojek	Canada	Kurdish-English-Arabic-French-German
9	Fire of Love	Canada	English-French
10	The Lebanese burger mafia	Canada	English

Source: MTAC

6.3. Summary of Findings

Viewership of Canadian documentaries spiked during COVID-19 lockdowns, both within Canada and internationally, with viewers becoming more interested in true crime content, productions that were escapist in nature, and productions engaging with social issues. This interest seems to have somewhat persisted beyond the core pandemic years.

Both English-language and French-language Canadian documentary television productions reached peak average weekly viewing hours in 2020 but the decline in 2021 were minimal and followed by an upward trend leading to significantly higher viewing hours in 2023/24. Approximately 45% of English-language television documentary viewing hours are attributable to Canadian documentaries (as opposed to foreign documentaries); however, this percentage is showing a slight decline, particularly during peak period viewing hours. In contrast, the French-language television documentary market is much more heavily dominated by Canadian productions, representing over three quarters of viewing time; however, viewing hours of Canadian content is also declining in the French-language market

Canadian documentaries fared well at the Canadian box office in 2023, despite strong international competition. Canadian French-language documentaries or multilingual documentaries continue to be slightly more successful than English-only documentaries.

Table of Figures

Figures

Tables

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