

Economic Impact of Black and Racialized Production in Ontario

Canadian Independent Screen Fund, June 2025
Photo credit: Yeshi Karang



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Disclaimer

Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Creates or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.

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Executive Summary

Ontario's Black and racially diverse producers generate vital economic activity and innovation in the province's screen industry. The *Economic Impact of Black and Racialized Production in Ontario* quantifies the financial contributions of Black and Racialized¹ productions and identifies key industry opportunities that underscore why Black and Racialized producers are essential drivers of Ontario's media economy.

Significant Gross Domestic Product (GDP) & Job Contributions: Black and Racialized film and television projects are generating substantial economic value. In 2024 alone, these productions contributed an **estimated \$62 million to \$104 million** to Ontario's GDP and supported about **550 to 950** full-time equivalent (FTE) jobs. This sizeable economic footprint illustrates the important role of Black and Racialized creators in job creation and provincial GDP growth.

Leadership & Entrepreneurship: 84% of surveyed production companies are fully Black and Racialized owned, demonstrating strong leadership representation. Most of these companies are small businesses – over half employ five or fewer people – reflecting a *lean, project-based workforce model*.

Financial Contributions & Challenges: The total production volume from the 68 surveyed Black and Racialized-led companies is estimated at \$25 million in 2024, financed largely through public funding and personal investment. Nearly half of Black and Racialized project financing surveyed comes from government sources (e.g. Canada Media Fund), often matched by creators' own funds. Private investors and broadcasters

contribute about 26% of production budgets.

International Collaboration & Market Expansion:

About 32% of Ontario's Black and Racialized production companies surveyed engage in international productions or co-productions. Such collaborations with international partners and tapping into diasporic communities are essential for reaching audiences and securing funding.

Rising Demand for Diverse Content: While discoverability and other issues exist, there remains a strong market for authentic stories from diverse voices. International audiences are increasingly seeking out Black and Racialized narratives, and recent successes demonstrate that Ontario's Black and Racialized content can resonate globally.

Innovation & New Intellectual Property (IP) Development:

81% of Black and Racialized-led companies surveyed plan to expand production capacity and develop new IP in the next 3–5 years, indicating a robust pipeline of projects on the horizon. Black and Racialized creatives are also branching into cross-media storytelling, such as immersive virtual reality (VR) content and video games.

Sectoral Growth Outlook: Nearly 46% of Black and Racialized producers surveyed expect an increase in their project volumes in coming years – a more bullish sentiment than the wider industry, where only 39% foresee an increase. Black and Racialized creators are poised to drive substantial progress in Ontario's screen sector, provided they can harness the opportunities in funding, skills development, and market access. The combination of content demand, new digital distribution channels, and a growing talent base positions Black and Racialized production as a dynamic cultural engine for the province's media economy.

¹ For this study, the term 'Black and Racialized media' refers to film, television and digital content that is significantly influenced, controlled and/or owned by Black and racialized people. Please see Appendix A for more detail.



1. Introduction

Purpose of the Study

The primary objective of this study is to provide a comprehensive economic analysis of the contributions of Black and Racialized producers to Ontario's media production sector. By leveraging survey data, interviews, and industry reports, it seeks to illuminate the role of Black and Racialized creators in driving economic activity, fostering innovation, and enriching the cultural fabric of the nation. This report also highlights systemic challenges and proposes evidence-based solutions. For the purposes of this study, Black and Racialized productions are defined as film, television and digital content that is significantly influenced, controlled and/or owned by Black and Racialized people. These projects reflect one or more of the following conditions:

1. Ownership and Production Control – The project is produced by Black and Racialized producers or by production companies that are at least 51% owned by Black and Racialized individuals. This ownership reflects a significant Black and Racialized influence in decision-making processes and creative direction of the project.

2. Key Creative Leadership – The project has at least two out of four of the following key roles – Producer, Writer, Director, and Showrunner – held by Black and Racialized individuals. This ensures substantial representation in the creative and managerial aspects of the production, influencing its narrative, execution, and overall vision.

This report contributes to the growing body of literature on diversity and inclusion in Canada's

screen-based industries. By focusing on the economic impact of Black and Racialized producers, it seeks to provide policymakers, industry leaders, and funding bodies with actionable insights to drive meaningful change. The findings will also serve as a resource for industry groups, creators, and educators committed to fostering equity in the media sector.

Methodology

This report synthesizes data from multiple sources, including studies conducted by Nordicity and the Racial Equity Media Collective (REMC) as well as Canadian Radio-television and Telecommunications Commission (CRTC) submissions, and economic assessments such as the Canadian Media Producers Association's (CMPA) *Profile 2024*² report.

Primary research, including interviews with industry professionals (see list in Appendix D) and over 60 survey responses, complements this secondary data, providing firsthand insights into the lived experiences of creators. The study focuses specifically on Black and Racialized creators, in alignment with CISF's mandate to support these communities. CISF operates in solidarity with the Indigenous Screen Office (ISO), which leads efforts to support Indigenous storytellers.

- **Survey** (June 2024) – Captured quantitative industry trends from 68 Black and Racialized Ontario-based production companies
- **Interviews** (March–May 2024) – Provided in-depth qualitative insights from 10 key industry stakeholders
- **Scenario-based Modeling & Economic Impact Analysis** – Estimated Black and Racialized production contributions based

² *Profile 2024: An Economic Report on the Screen-based Media Production Industry in Canada*, reflecting production activity between April 1, 2023, and March 31, 2024, was released by CMPA in late December 2024.

on public datasets from Ontario Creates, CMPA and Statistics Canada and CISF survey input (please see Appendix D for details)

- Sources Consulted: Publicly available production figures from Ontario Creates, CMPA and Statistics Canada served as foundational inputs
- Survey Integration: Insights from the CISF survey were incorporated to enhance data granularity, particularly regarding Black and Racialized-focused productions

Quantitative analysis is supported by economic modeling techniques, ensuring a robust representation of the economic footprint of Black and Racialized productions. However, while this study employs a rigorous mixed-methods approach, certain limitations and risks must be acknowledged including:

- Data Availability & Race-Based Tracking Gaps
- Survey Response & Sample Size Constraints
- Self-Reporting & Subjectivity Risks
- Scenario-Based Modeling Assumptions

See Appendices B and E for further details.

Current Landscape

Ontario's media production landscape stands as a testament to the nation's cultural diversity and creative talent. Black and Racialized producers bring unique perspectives and stories that reflect Canada's evolving cultural identities. Their work not only enriches the national narrative but also enhances the global competitiveness of Canadian content. However, the contributions of Black, Indigenous, and Racialized producers remain underrepresented and undervalued in economic and industry narratives.

Recent challenges in the production ecosystem have added further complexity. Declining revenues among Canadian broadcasters—a trend that is expected to persist—pose risks to the commissioning of new content. Coupled with inflationary pressures that have driven up production costs, these headwinds are contributing to a decline in production activity in real terms. While labour strikes, such as those recently observed in Hollywood, are not expected to become frequent, industry stakeholders have voiced concerns about their long-term impact on production pipelines and content commissioning.

Looking Ahead

This report aims to address this gap by quantifying the economic contributions of Black and Racialized producers, analyzing barriers to equitable participation, and recommending actionable strategies to foster inclusivity and growth in Ontario's screen-based industries. Through a combination of rigorous data analysis and compelling narratives, the subsequent sections of this report pave the way for a more inclusive and prosperous media landscape.



2. Overview

2.1 Literature Review

This literature review synthesizes insights from an extensive range of over 40 publications to offer a multidimensional analysis of the economic impacts, systemic barriers, and growth opportunities for Black and Racialized media production in Ontario. These resources collectively establish a comprehensive foundation for understanding the dynamics of this sub-sector within the broader Canadian media landscape.

The reviewed materials span critical reports and studies from leading industry organizations, including:

- Canada Media Fund (CMF): Studies providing demographic insights and evaluating the systemic challenges faced by underrepresented creators.
- Ontario Creates: Annual production statistics and economic impact assessments specific to Ontario's vibrant film and television industry.
- Canadian Media Producers Association (CMPA): Annual "Profile" reports offering national and provincial breakdowns of economic contributions, employment, and production trends.
- Racial Equity Media Collective (REMC): Data-driven studies highlighting systemic inequities and proposing policy solutions for racial equity in media production.
- Black Screen Office (BSO): Groundbreaking research such as "Being Seen" and "Being Counted" reports that examine authentic representation and audience engagement.
- Telefilm Canada (Telefilm): Reports addressing funding trends and representation in Canada's media landscape.

Additional perspectives are drawn from grassroots advocacy organizations, independent production company case studies, and interviews with key stakeholders, who provided valuable context on the lived experiences of Black and Racialized producers and the structural economic barriers they face.

The review highlights the interconnectedness of economic and cultural factors driving Black and Racialized production in Ontario. For instance, the financial barriers faced by producers are intrinsically linked to broader systemic inequities in commissioning, funding, and access to key industry networks. Conversely, increasing support for Black and Racialized creators not only enhances equity but also fosters innovation, attracts global audiences, and strengthens Ontario's media ecosystem.

By drawing on these varied perspectives, the literature review provides actionable insights that inform this report's analysis of production volumes and economic contributions, as well as its insights for future policy and funding frameworks.

2.2 Interviews

The comprehensive literature review, alongside primary interview responses from stakeholders actively engaged in the sector provide valuable insights summarized below. This subsection explores themes including funding access, systemic economic inequities, technological adoption, and policy interventions to create an equitable and competitive media production landscape.

Interview Question 1: Economic Viability Impacts of EDI Initiatives

Overall, interviewees stated the impact of Equity, Diversity, and Inclusion (EDI) initiatives on the economic viability of Black and Racialized productions in Ontario has been transformative yet complex. These initiatives, including mentorship programs and targeted funding such as the CMF's Program for Black and

Racialized Communities (PBRC), have begun to address systemic inequities, enabling more diverse creators to enter the industry and get their projects greenlit.

However, respondents indicated that challenges remain as reduced labour market opportunities, shrinking production budgets, and barriers to accessing mainstream funding streams continue to hinder the full realization of these programs' potential. The success stories—ranging from enhanced visibility of Black and Racialized projects to increased hiring within these communities—showcase the promise of these efforts. Yet, stakeholders emphasize that long-term change requires deeper structural reforms to ensure sustained equity, inclusion, and economic viability for Black and Racialized creators.

Key Findings – Question 1:

1. Increased Access to Funding and Opportunities

- Initiatives such as the PPRC have expanded access to funding for Black and Racialized creators, leading to projects like *Queen Tut* being greenlit and supported without requiring personal financial sacrifices from the creators.
- Programs like Ontario Creates' Interactive Digital Media (IDM) Fund Futures Program have removed barriers for emerging companies, democratizing access to development opportunities.

2. Visible Growth in Black and Racialized Representation

- EDI initiatives are perceived as having resulted in a noticeable increase in the number of Black and Racialized creators entering the industry, supported by organizations such as the BSO, ISO, and Disability Screen Office (DSO) as well as Reelworld, Reel Asian, ImagineNative and BIPOC TV & Film.

- Projects such as *Tokens* and creators like Winnie Wong have garnered recognition, reflecting the growing confidence and visibility of Black and Racialized talent.

3. Challenges in Systemic Barriers

- Despite progress, systemic barriers remain, including limited access to mainstream funding and persistent biases in the labour market. Please see section 4.1 *Challenges* for a full discussion.
- Writers' rooms and production budgets have shrunk, making it harder for new talent to gain industry experience and for Black and Racialized companies to thrive economically.

4. Economic and Cultural Benefits of Diversity

- Success stories like *Brother* and *BLK Story: An Origin Story* demonstrate how diverse voices resonate with audiences, bringing both cultural and economic benefits.
- However, translating consumer demand into marketability remains a challenge, especially when attempting to sell Canadian Black and Racialized content internationally.

Notable Quotes:

"Writers' rooms have shrunk, and production budgets have decreased. Producers are less likely to invest their limited resources in untested talent, perpetuating a cycle where the same barriers persist despite new programs."

"The pilot program for Racialized communities broadened the pool of accessible money to people of diverse backgrounds, allowing projects featuring a majority Black and Racialized crew to get funded."

Interview Question 2: Marketability and Viewer Demand

The marketability of Black and Racialized productions is shaped by shifting viewer preferences and the growing demand for authentic, diverse content. Interviewees commented that while international interest in Black and Racialized stories is evident, the Canadian industry has been slow to adapt, often sidelining these creators. Successful projects like *Transplant* demonstrate the global resonance of such stories, yet inconsistent international sales and limited domestic support reveal ongoing challenges.

The rise of digital platforms has provided opportunities to bypass traditional gatekeepers, enabling Racialized producers to reach younger and more diverse audiences. However, the success of Black and Racialized content hinges on genre-based storytelling, discoverability on digital platforms, and audience development. While the pandemic may have expanded global appetite for unique cultural narratives, there remains a need for stronger policies, investments, and strategies to fully realize the marketability and potential of Black and Racialized productions.

Key Findings – Question 2:

1. Growing Demand for Diverse Content

- International markets increasingly seek authentic and unique Black and Racialized narratives, with projects like *#WhileBlack* gaining traction from broadcasters such as BBC Storyville and Crave.
- Genre-based productions, particularly in horror and children's programming, have proven successful internationally, as seen in festival hits and globally relevant social commentary stories.

2. Challenges in International Sales

- Despite domestic acclaim, Black and

Racialized projects often face mixed results in international markets, with industry reluctance to adapt limiting broader sales opportunities. Please see section 4.1 *Challenges* for a full discussion.

- The lack of global market knowledge among local producers and insufficient investment in international marketability are ongoing barriers.

3. Role of Digital Platforms

- Streaming platforms have opened avenues for Racialized creators to connect directly with younger, diverse audiences, bypassing traditional broadcasters.
- Policy directives to CRTC and regulatory reform inspired by the Online Streaming Act can be critical to enhancing the discoverability of Black and Racialized content on digital platforms, supporting market reach and financing viability.

4. Importance of Audience Development

- Investments in creating high-quality, universally resonant content are essential for improving both domestic and international audience engagement.
- Audience demand shapes marketability; the pandemic has increased global appetite for culturally unique and diverse narratives.

Notable Quotes:

"Despite projects like Transplant proving there's a market for Black and Racialized stories, many producers still struggle to gain traction internationally. The disconnect between local industry support and global market expectations remains a major barrier."

"Younger, more diverse audiences are turning to digital and streaming platforms, which has created a direct path for Racialized producers to reach their target

viewers. Traditional broadcasters still cater to loyal but narrower audiences, leaving these emerging platforms as the primary avenue for growth.”

Interview Question 3: Financing and Support Needs

Interviewees said that financing and support mechanisms are critical to the success of Black and Racialized productions in Canada. While public funds such as Telefilm and the CMF provide foundational support, these programs often fall short of adequately addressing the unique barriers faced by Black and Racialized creators. Many respondents stress the importance of targeted funding initiatives, revised eligibility criteria, and mentorship programs to enable equitable access. Moreover, private funding and community-based support have been identified as essential complements to public resources. Despite the progress made through content creation, training, and business advancement initiatives, a more robust, data-driven approach is needed to sustain long-term financial viability for Black and Racialized producers. The consensus among interviewees seems clear: equitable funding, systemic reform, and strategic mentorship are critical to leveling the playing field.

Key Findings – Question 3:

1. Targeted and Accessible Funding Models

- Initiatives implemented by the CMF and Telefilm, such as targeted and redistributed funds as well as updated policies and commitments, provide a foundation, their eligibility criteria and funding models may need revision to better include Black and Racialized producers. Please see section 4.2 *Opportunities and Supports*.
- Increasing allocations specifically for Black and Racialized communities and providing baseline data to measure impact are critical next steps.

2. Private Funding and Community Support

- Reducing reliance on public funds requires mobilizing private equity investment or community based crowd funding campaigns.
- Greater collaboration between public and private sectors can ensure diversified funding streams and increased economic sustainability for Black and Racialized productions.

3. Mentorship and Industry Representation

- Mentorship programs led by organizations like film festivals and broadcasters (e.g., Crave) have proven successful in breaking systemic barriers.
- Diverse commissioning editors are necessary to greenlight and support Black and Racialized stories, ensuring their narratives are understood and valued.

4. Impact of Training and Business Advancement

- Training programs have facilitated entry into unions and the industry, addressing long-standing systemic barriers.
- Business advancement initiatives such as the National Screen Institute-led, EAVE-inspired Access BIPOC Producers Program have helped Black and Racialized companies secure resources and compete on equal footing.

Notable Quotes:

“Public funding isn’t enough on its own. Engaging private investors, especially those from within the Black and Racialized community, could significantly reduce the dependence on government programs and provide more flexibility for creators.”

“Mentorship programs have been game-changers. They’ve not only trained new talent but also ensured Black and Racialized

stories get the attention they deserve by pairing creators with experienced, diverse commissioning editors.”

Interview Question 4: Leveraging Technology and Collaboration

The rapid evolution of technology and global collaboration presents a unique opportunity for Black and Racialized producers to enhance their production processes and expand their reach. Some interviewees stated that new technologies like artificial intelligence (AI), virtual production, and cloud-based systems are increasingly used to cut costs, streamline operations, and maintain storytelling quality, authenticity and integrity. Others stated that their adoption in the domestic production sector remains limited, highlighting the need for training programs and accessible tools.

International collaborations and export opportunities also play a vital role in the growth of Black and Racialized productions, enabling them to tap into diasporic communities and larger global markets. By fostering partnerships across media sectors, such as gaming and music, producers can diversify their revenue streams and build sustainable projects. Embracing innovation and collaboration is essential for Black and Racialized producers to remain competitive in an evolving industry.

Key Findings – Question 4:

1. Cost Savings and Efficiency Through Technology

- AI and cloud-based systems are being leveraged to reduce production costs, create pitch decks, and generate loglines and synopses, even storyboarding.
- Tools like LED studios and virtual production are helping producers reduce expenses related to on-location shoots, though their adoption remains limited domestically.

2. Building International Collaborations

- Collaborations with international partners and tapping into diasporic communities are essential for Black and Racialized producers to expand their reach and secure funding.
- Export opportunities provide a pathway for Black and Racialized projects to access larger global markets, enhancing their financial viability.

3. Cross-Media Opportunities

- Racialized creators are increasingly involved in immersive media, video games, and VR, which offer cost-effective ways to produce and distribute content.
- Training in game development software like Unity and Unreal Engine could provide Black and Racialized creators with transferable skills, enabling them to explore diverse storytelling formats.

4. Addressing Barriers to Adoption

- Despite the potential of new technologies, their high costs and slow adoption in mainstream production remain significant barriers.
- Sharing best practices and improving access to training and tools can help bridge the gap and empower Black and Racialized producers to fully leverage technological advancements.

Notable Quotes:

“We’re using AI tools like ChatGPT to create pitch decks and synopses and even exploring AI-generated images for a new YouTube channel. These technologies save time and resources, which is critical for smaller productions.”

“Racialized creators are doing incredible work in VR, gaming, and digital-first content. Training in tools like Unity and Unreal

can open new doors, allowing Black and Racialized producers to tell stories across platforms and reach broader audiences.”

Interview Question 5: Economic and Non-Economic Barriers

Interviewees stated that Black and Racialized productions in Canada face significant economic and non-economic barriers, which hinder their growth and sustainability. Financing challenges, including limited access to capital and inflated labour costs driven by foreign productions, create considerable obstacles for producers. Systemic biases within the industry further marginalize Black and Racialized creators, often confining them to niche roles or genres. Non-economic barriers, such as institutional resistance and lack of representation, exacerbate these challenges, limiting the visibility and success of Racialized producers.

Changes in the funding landscape, while creating new opportunities, have also introduced heightened competition and inequities for partially Black and Racialized-owned companies. Comprehensive policy reforms, capacity building, and equitable terms of trade are essential to address these systemic issues and foster a supportive ecosystem for Black and Racialized creators. By tackling both economic and non-economic barriers, the industry can ensure the sustainability and equity of its production landscape.

Key Findings – Question 5:

1. Economic Barriers

- Limited access to capital and cash flow issues are significant obstacles for Black and Racialized producers, compounded by high labour costs driven by foreign productions.
- The static nature of public funding, coupled with increased production costs, has made maintaining profitability a challenge for

many Black and Racialized companies.

2. Non-Economic Barriers

- Systemic biases and institutional resistance continue to marginalize Black and Racialized creators, limiting their opportunities and confining them to niche roles or genres.
- Ghettoization of Black and Racialized talent within the industry remains a persistent issue, requiring structural changes to dismantle.

3. Shifts in Funding Landscapes

- Increased competition for limited targeted funding has benefited fully Black and Racialized-owned companies but may have created access challenges for partially Black and Racialized-owned entities.
- Industry consolidation and tightened funding funnels, especially post-pandemic, have exacerbated these accessibility challenges.

4. Recommendations for Systemic Change

- Policies enabling production companies to retain equity in their projects are critical for long-term sustainability.
- Capacity building, fostering international market access, and ongoing policy monitoring are essential for creating a supportive and equitable ecosystem.

Notable Quotes:

“The cost of hiring local talent has skyrocketed because of the demand created by foreign productions. It’s a double-edged sword—while it brings more work to the area, it makes it harder for smaller Black and Racialized projects to compete.”

“By building relationships with diasporic communities and fostering collaborations outside Canada, Black and Racialized

producers can tap into global markets and expand the reach of their stories. Export opportunities are key to financial viability.”

Interview Question 6: Policy and Support Mechanism Changes

To address systemic barriers and create a more equitable production ecosystem, policy changes and support mechanisms must prioritize the needs of Black and Racialized producers. These include increasing funding allocations to reflect rising production costs and inflation, ensuring equitable representation on selection committees, and conducting equity audits of institutions such as the CRTC. Industry stakeholders emphasize the importance of moving beyond performative diversity measures to implement meaningful, justice-focused initiatives.

Additionally, targeted support for mid-tier and smaller production companies, along with improved access to private equity, is critical for fostering sustainable growth. Policies should also focus on enhancing discoverability for Canadian content, facilitating international market access, and supporting company development through stable, adaptable funding mechanisms. These measures are essential for building a more inclusive and competitive industry landscape.

Key Findings – Question 6:

1. Increased Funding and Representation

- Expanding film funds to account for inflation and rising production costs is essential to prevent smaller productions from being priced out of the market.
- Equitable representation on selection committees.
- Equity audits of funding agencies and institutions like the CRTC are critical for fostering accountability and transparency.

2. Support for Smaller and Mid-Tier Productions

- Policies should include targeted funding for smaller and mid-tier production companies to ensure a broader and more inclusive distribution of resources.
- Initiatives like pre-arranged meetings with broadcasters to secure Letters of Intent (LOIs) can help these companies navigate the funding landscape effectively.

3. Private Equity and Capacity Building

- Access to private equity and networking opportunities can reduce reliance on public funding and provide greater financial stability for Black and Racialized producers.
- Mentorship and development programs remain vital for building capacity and supporting long-term sustainability.

4. Enhancing Market Access and Discoverability

- Policies should improve the discoverability of Canadian content on digital platforms to increase visibility for Black and Racialized productions.
- Supporting international market access through programs like interim financing and loan guarantees can help Black and Racialized producers scale their operations and compete globally.

Notable Quotes:

“CanCon (Canadian content) requirements do not meet the needs of Black and Racialized creators who often need to collaborate with non-Canadian key creatives from their communities or language groups.”

“We need to ensure that funds grow to reflect inflation and the rising costs of production. Smaller projects can’t keep up with the demand for labour created

by larger studios, and this pricing out is making it harder for Black and Racialized productions to survive.”

2.3 CISF Survey Findings – A Snapshot of Black and Racialized Production in Ontario’s Screen Industries

1. Survey Methodology

The *Economic Impact of Black & Racialized Production in Ontario* relied on a mixed-methods approach, integrating quantitative survey data, qualitative interviews, and secondary research. The anonymous survey was conducted in June 2024, targeting Black and Racialized production companies in Ontario. It was distributed in collaboration with CISF, REMC, CMPA, and other partner organizations, ensuring broad industry participation. In total, 68 respondents completed the survey, though response rates varied across individual questions.

The primary goal of the survey was to provide a snapshot of production volumes, financing structures, employment trends, and industry outlook for Black and Racialized screen production in Ontario. See Appendices C and D for additional methodological details.

To ensure statistical validity and representativeness, data adjustments were made:

- Multiple-response questions were included to capture diverse industry experiences.
- Response-weighted calculations were applied to normalize variations in answer rates.
- Incomplete responses were accounted for using adjusted weighting, reducing biases in reported estimates.

While there is no single registry that tallies all Black and Racialized-owned production companies in Canada, CMF’s 2021 survey (IPSOS) is probably the most comprehensive of its kind. It drew responses from around 154 production companies owned by Black and Racialized producers. Of these, 44 were Black-owned, along with companies representing Latin American, Middle Eastern, South Asian, and East/Southeast Asian ownership.

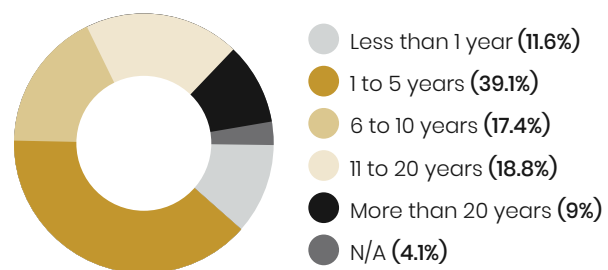
2. Company Overview

Black and Racialized production companies in Ontario display notable diversity in terms of their age, ownership structures, and representation in key creative roles.

a) Company Age: About half of survey respondent companies are less than six years old, reflecting the growing emergence of new voices and perspectives in the industry.

- 39% of survey respondents have been incorporated for *1 to 5 years*, while 12% are *less than a year old*.
- More established companies include 17% that have operated for *6 to 10 years*, 19% for *11 to 20 years*, and only 9% for over 20 years.

Figure 1 – Company Age



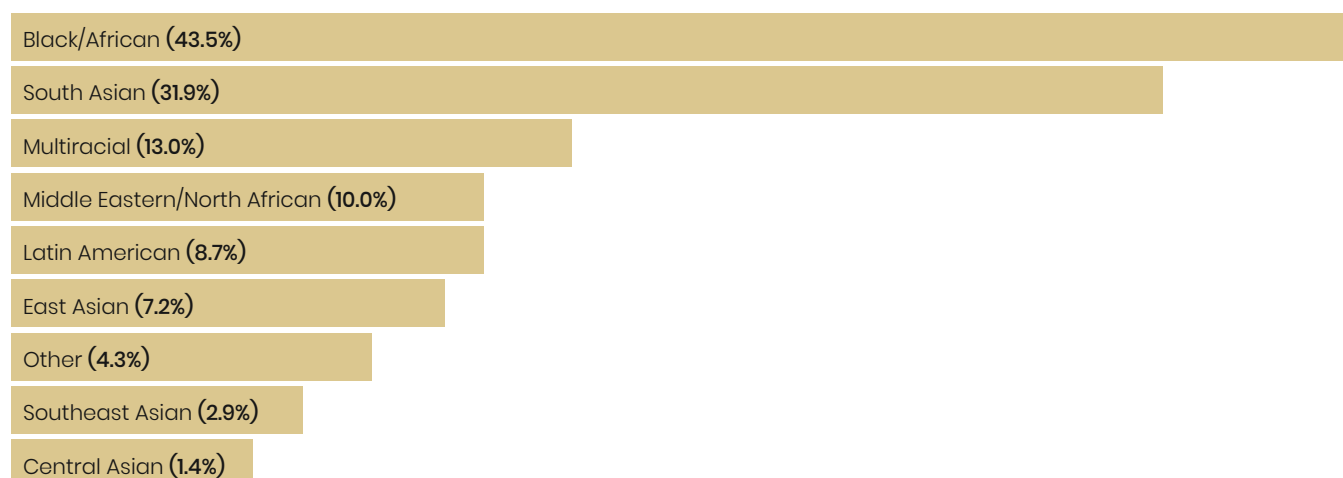
N = 68

Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

b) Representation & Diversity: Overall, 84% of survey respondents reported that in 2024 their production companies are *Fully owned by Black and Racialized producers*. Respondents also demonstrated representation across multiple communities, underscoring the rich cultural perspectives that Black and Racialized production companies bring to Canadian media.

- *Black/African* individuals comprise the largest group at 43%, followed by *South Asian* respondents at 32%.
- Other groups include *Multiracial* (13%), *Middle Eastern/North African* (10%), and *Latin American* (9%). Smaller proportions represent *East Asian* (7%), *Southeast Asian* (3%), and *Central Asian* (1%).

Figure 2 – Representation & Diversity



N = 68

Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

- **Black and Racialized Representation in Key Creative Roles:** Notably, 78% of respondents have produced projects with *Black and Racialized directors*. 72% have worked with *Black and Racialized producers* and 66% with *Black and Racialized screenwriters*.
 - Given that primarily TV projects have showrunners (for example, the role is excluded from documentaries and films), it is not surprising that only 31% of overall survey respondents report working with them. However, of the respondents producing for TV, 38% report working with *Black and Racialized showrunners*.³

³ This may result from an underrepresentation of the role in the industry as evidenced by Showrunner training programs such as [CBC-BIPOC TV & Film Showrunner Catalyst](#) and [WBD Access Canada Showrunners Bootcamp](#).

Figure 3 – Black and Racialized Representation in Key Creative Roles



N = 68
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

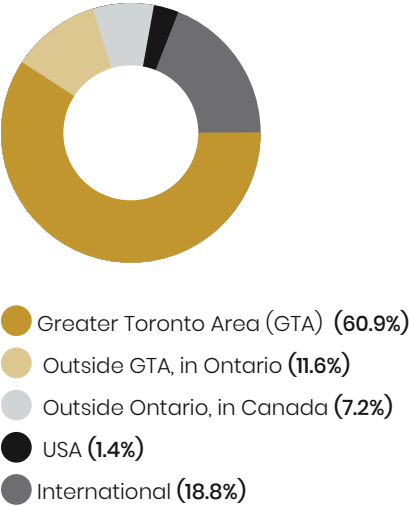
3. Production Overview

This overview of production activities provides insights into the project scope, geographic focus, and creative output of Black and Racialized companies.

- a) Project Volumes:** In 2024, 34% of survey respondents have 1 to 3 projects in development, 24% in production and 31% in post-production.
- b) Locations:** 57% of respondent companies indicated that they are incorporated in Ontario, and 43% indicated that they are federally incorporated. The chart below shows 61% of respondents produce in the Greater Toronto Area (GTA), showcasing the region’s status as a central hub for Black and Racialized production activity. Other notable production locations include:

- 19% of survey respondents selected *International*, however less than 2% in the *USA*
- 12% *Outside the GTA but within Ontario*, 7% in *Other parts of Canada*.

Figure 4 – Production Locations



N = 68
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

- c) Production Areas:** A quarter of respondent companies report engaging in multiple production areas. As shown in Figure 5 on page 20, 86% of respondent companies primarily focus on domestic production; 32% primarily participate in *International productions or co-productions*.
- 22% of respondents primarily provide *Production services to other companies* and 4% selected *Other*.

Figure 5 – Production Areas



N = 68
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

d) Media Production Types: 65% of respondents indicated that they are involved in *Television* production, followed by 59% in *Feature films*. 41% of respondent companies produce *Other* content (including short films, commercials and web series).

Figure 6 – Media Production Types

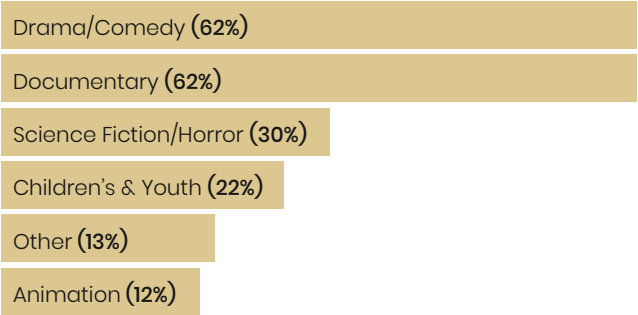


N = 68
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

e) Genres: 62% of respondents focus on drama/comedy and documentary projects, two genres that may balance commercial viability with opportunities for authentic storytelling.

- 30% of companies work in science fiction/horror, a niche genre with strong international appeal.
- 22% specialize in children’s and youth programming, while 12% focus on animation, both known for their export potential and alignment with global content demand.
- 13% identified “Other” including thriller, art house, fantasy, community news and entertainment, reality, talk show, lifestyle/news.

Figure 7 – Genre

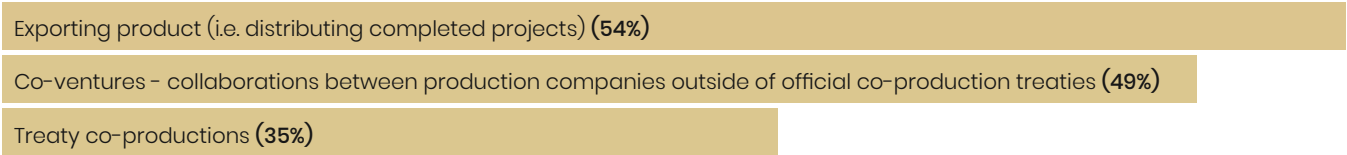


N = 68
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

f) Co-productions & Export: While 54% of respondents report Exporting product:

- 49% have participated in *Co-ventures*, collaborations between production companies outside of official co-productions.
- 35% have participated in *Treaty co-productions*.

Figure 8 – Co-productions & Export



N = 37
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

4. Financial Overview

1. Production Volume

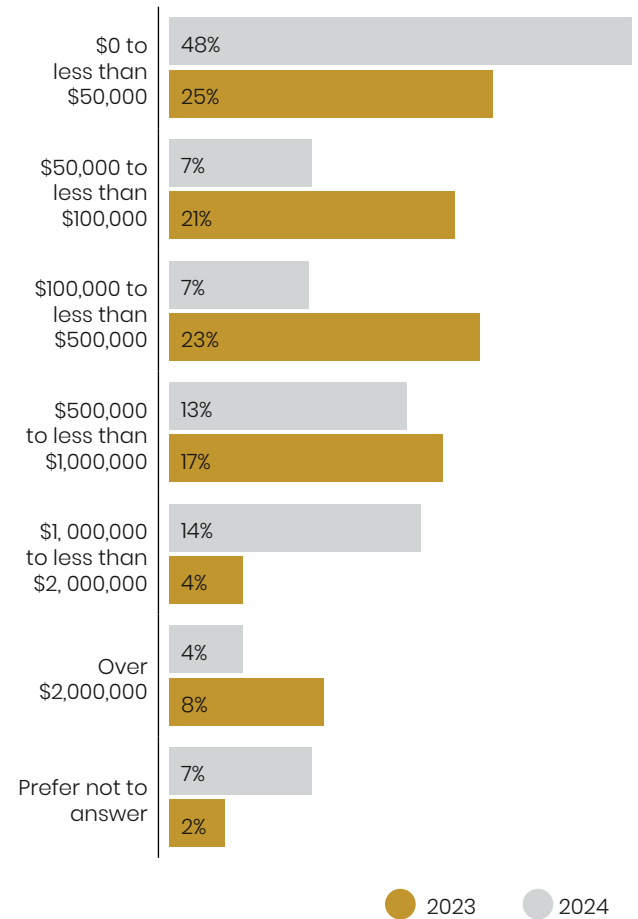
The survey data provides insights into the annual production volume ranges of Black and Racialized media production companies over the last two years, highlighting shifts in budget allocations and economic scale within the industry.

The total estimated production volume for 2023 and 2024 was derived by multiplying the midpoint of each range by the number of respondent companies within that range. See Appendix D for additional calculation details. Key assumptions and processes include:

- High-budget projects (“Over \$2 million”) were conservatively estimated at \$3 million to standardize calculations.
- Responses categorized as “Not applicable” or “Prefer not to answer” were excluded to maintain data accuracy.

The total production volume estimates of survey respondents remain stable at \$25.4 million for both 2023 and 2024, despite fluctuations shown below.

Figure 9 – Survey Respondents’ Estimated Annual Production Volume for 2023 and 2024



N = 40
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

- **Prevalence of Budgets less than \$50,000:** In 2024, 48% of respondents reported production volumes in the *\$0 to less than \$50,000* range, representing a dramatic increase in ultra-micro budget compared to 24% the previous year. This likely reflects shrinking revenues that accrue to Black and Racialized producers.
- **Decrease in Micro-budgets:** Both the *\$50,000 to less than \$100,000* and *\$100,000 to less than \$500,000* budget tiers saw declines from 2023 to 2024, dropping from 14% and 16%, respectively. A 4% drop in the *\$500,000 to less than \$1 million* category was also observed.
- **Low-budget projects:** While those in the *\$1 million to less than \$2 million* range increased, from 4% in 2023 to 14% in 2024, over *\$2 million* projects dropped notably from 8% to 4%.

2. Production Budget Ranges

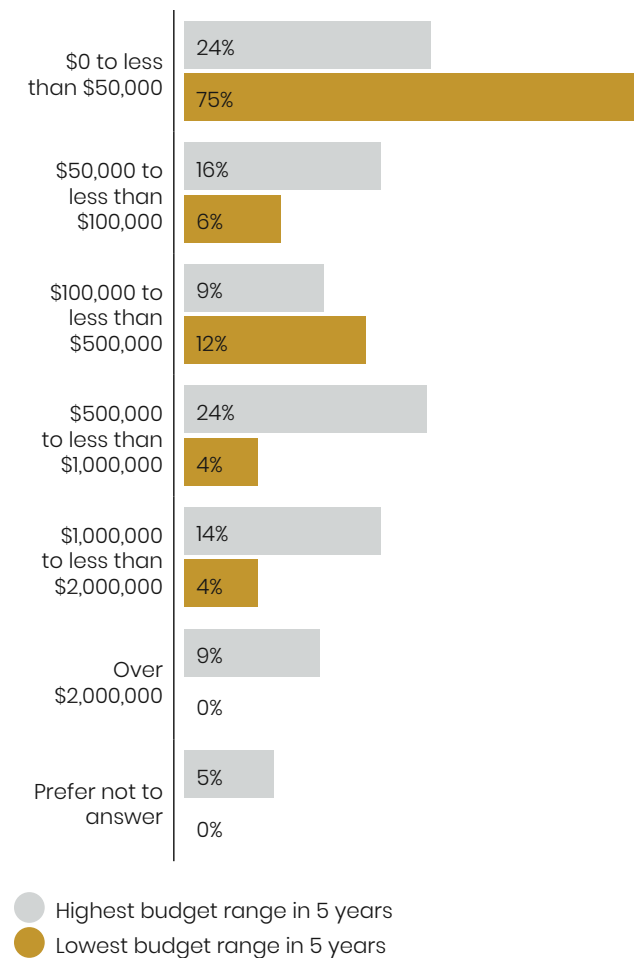
The chart below highlights the range of production budgets for projects by Black and Racialized companies in Ontario over the past five years. Notably, the fact that almost 50% survey respondents report highest budget ranges of under \$500,000 likely suggests a market imbalance where Black and Racialized producers are overrepresented in small-budget, often self-financed or grant-funded content creation.

- **Prevalence of Budgets less than \$50,000:** The *\$0 to less than \$50,000* range dominated the lowest production budgets reported, with 75% of respondents identifying this as their lowest range over the past five years. However, for the highest budget range, only 24% of respondents cited this category.
- **Micro-budget Ranges:** For the *\$50,000 to less than \$100,000* category, 16% of respondents identified this as their lowest budget range, while 6% reported it as their highest. Similarly, the *\$100,000 to less than \$500,000* category was reported by

12% as the lowest and 9% as the highest. The *\$500,000 to less than \$1 million* range reflects an interesting contrast, with 24% of respondents citing it as their highest budget range and only 4% naming it as their lowest.

- **Low-budget Ranges:** The *\$1 million to less than \$2 million* range was cited as the highest budget range by 14% of respondents, whereas only 4% noted it as their lowest. Similarly, projects with budgets over \$2 million were reported as the highest budget range by 9% of respondents, with 0% naming this as their lowest.

Figure 10 – Production Budget Ranges



N = 53

Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

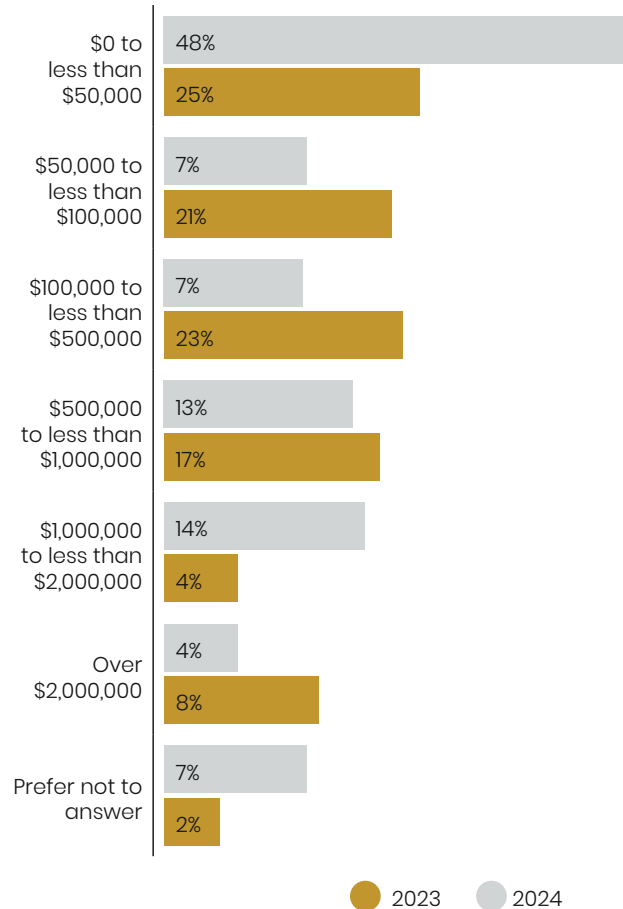
3. Development Volume

The survey data provides insights into the annual development volume ranges of Black and Racialized media production companies over the last two years. As above, a midpoint-based calculation method was used to estimate total development volume for 2023 and 2024.

Estimated development budgets of survey respondents increased from \$1.9 million in 2023 to \$2.6 million the following year, reflecting a 40% growth in allocated funds.⁴ This increase may be indicative of industry mandates to fund Black and Racialized projects in development.

- Smaller budgets (\$0–\$10,000) declined as a share of total funding, with \$5,000–\$10,000 projects dropping from 19% to 14%, while \$0–\$5,000 budgets remained stable (25% to 26%).
- Mid-range budgets (\$10,000–\$50,000) saw a slight decline (29% to 24%), though total funding remained unchanged at \$420,000.
- Higher-budgets (\$50,000 – \$200,000) saw the largest increases, with \$50,000–\$100,000 budgets rising from \$450,000 to \$750,000 (+67%) and \$100,000–\$200,000 budgets increasing by 25%; over \$200,000 projects doubled.

Figure 11 – Survey Respondents’ Estimated Annual Development Volume for 2023 and 2024



N = 29
 Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

4. Development Budget Ranges

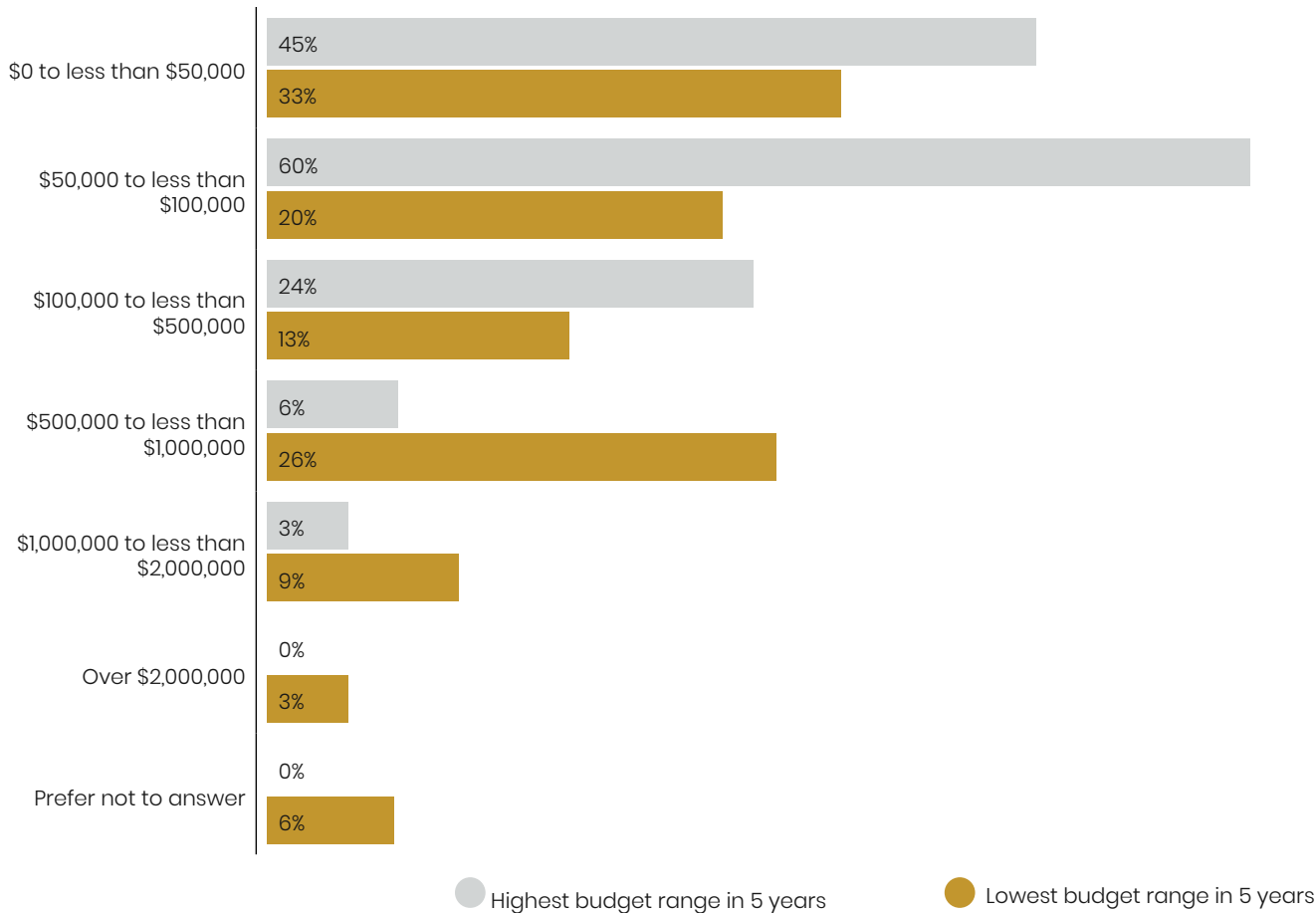
Figure 12 highlights the range of development budgets for projects by Black and Racialized companies in Ontario over the past five years. Overall, most respondents (60%) had their lowest budgets between \$5,000 and \$10,000, and 45% had budgets under \$5,000. Only a

⁴ In 2021, the Rogers–BSO Script Development Fund was launched, also Telefilm introduced the [Development Stream for Racialized Persons](#), granting over \$2.5 million to 143 projects from 93 companies.

small minority (3%) reached development budgets exceeding \$200,000, while 9% accessed budgets between \$100,000–\$200,000 as their highest range.

- **Prevalence of Smaller Ranges:** The \$0 to less than \$5,000 range was the most commonly reported lowest development budget (45%), while 33% of respondents identified it as their highest budget range. Projects in the \$5,000 to less than \$10,000 range were also frequently reported as the lowest budget (60%), though 20% cited it as their highest, indicating that a portion of productions still operates at this funding level.
- **Mid-Ranges:** The \$10,000 to less than \$50,000 range saw a significant contrast, with 24% of respondents citing it as their lowest budget range, while 13% identified it as their highest. For the \$50,000 to less than \$100,000 category, 6% of respondents reported it as their lowest, while 26% cited it as their highest. The \$100,000 to less than \$200,000 range was reported as the lowest budget by 3% of respondents and the highest by 9%.
- **Higher budgets:** Over \$200,000 budgets remain rare, with only 3% of respondents identifying it as their highest budget range, and 0% listing it as their lowest.

Figure 12 – Development Budget Ranges



N = 30
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund



5. Spending Priorities and Employment Trends

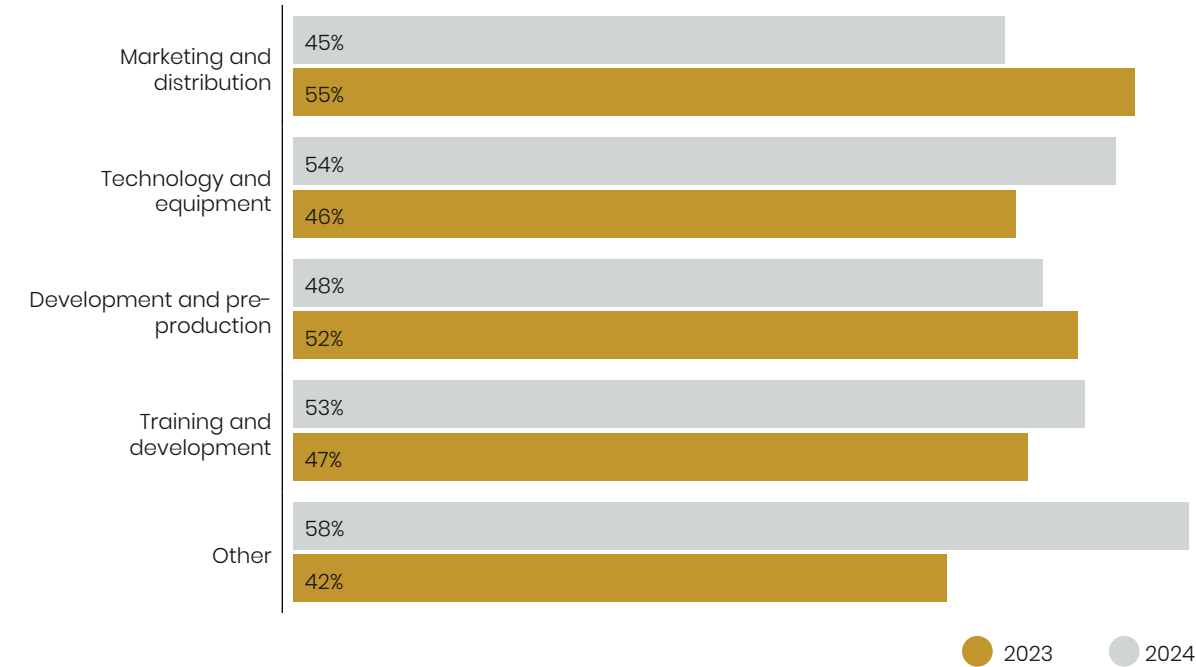
Understanding the spending priorities and labour trends among Black and Racialized production companies provides critical insights into the sector’s current operations and future growth trajectory.

a) Spending Priorities: Among respondents, *Research & Development* and *Other* spending surged to 58% in 2024; *Other* includes: *Export and Market development*, *Rent for spaces*

during production, Demo / Proof of concept, Post-production and marketing, Labour and Actors.

- *Technology & Equipment* investment grew from 46% to 54%, highlighting the push for digital infrastructure and modernization.
- *Marketing & Distribution* declined from 55% to 45% and *Training & Development* saw a moderate 5% increase.

Figure 13 – Spending Priorities



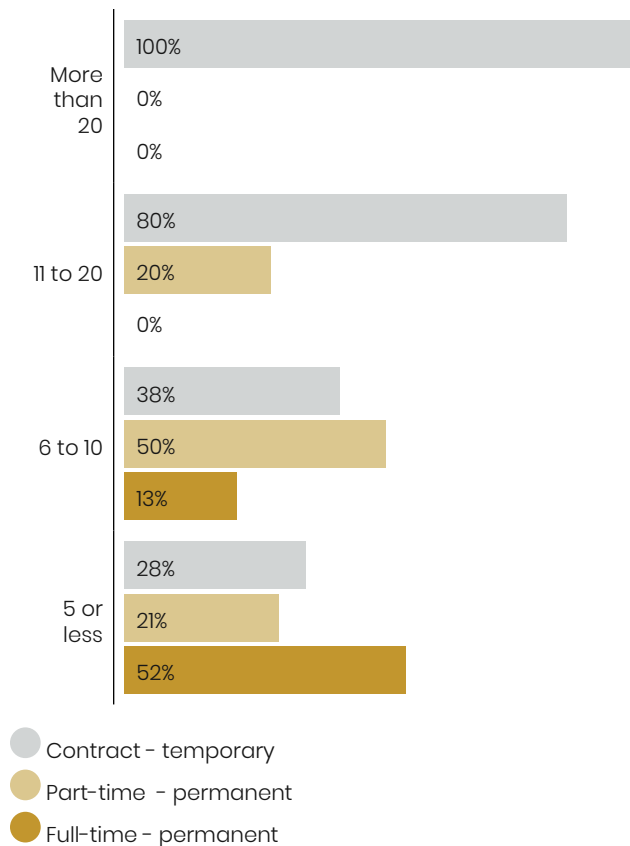
N = 30
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

b) Employment Distribution: Overall, survey results show that companies with the fewest employees have the highest proportion of full-time permanent employees, whereas larger companies rely more on contract-based staffing.

- Survey respondent companies with 5 or less employees are most likely to have full-time permanent staff (52%), while contract roles remain significant (28%).
- Mid-sized teams (6–10 employees) have a balanced mix, with 50% in part-time permanent roles and 38% in contract positions.

- Larger teams (11+ employees) are predominantly contract-based, with 80% in contract roles for 11–20 employees and 100% for teams over 20 employees.

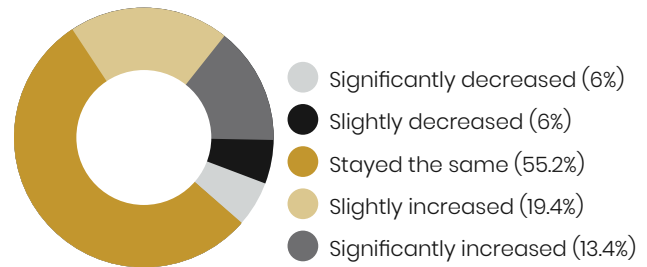
Figure 14 – Employment Distribution



N = 63
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

c) Employee Growth: Since 2019, while 55% of companies surveyed report no change in employee numbers, about 33% indicate an increase and 12% a decrease.

Figure 15 – Employee Growth



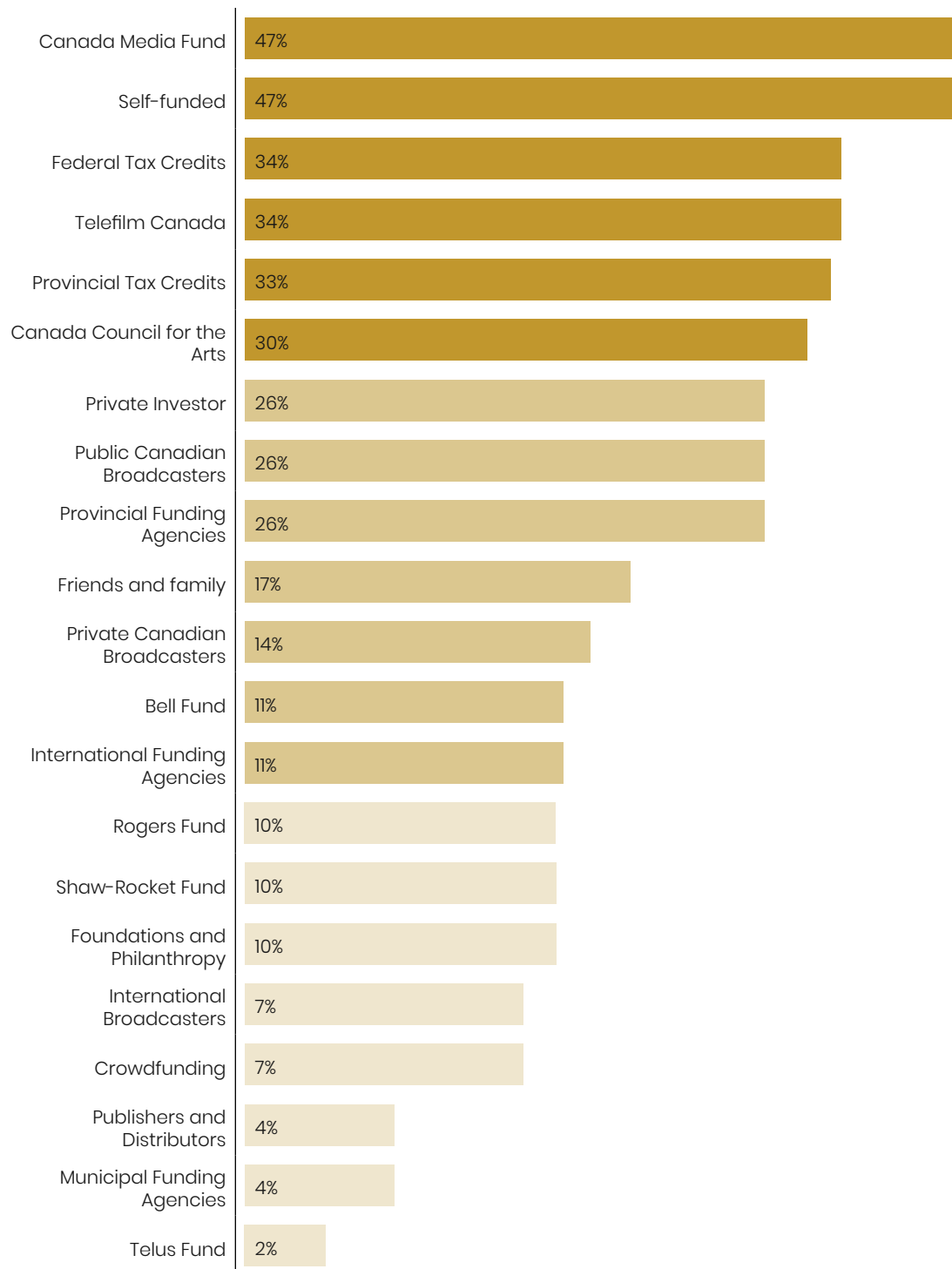
N = 67
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

6. Funding Sources

Both *CMF* and *Self-funding* represent the largest sources of financing, each cited by 47% of respondents. *Federal Tax Credits* and *Telefilm* were each cited by 34% of respondents and *Provincial Tax Credits* follow closely at 33%. Also:

- Canada Council for the Arts: Cited by 30% of respondents
- Private Investment and Broadcasters: Private investors, public broadcasters, and provincial funding agencies were each cited by 26%, indicating their importance as secondary funding streams.
- Friends and family funding (17%) and Private Canadian broadcasters were reported less frequently at 14%
- Bell Fund and Rogers Fund: Both cited by 11%
- Crowdfunding (7%) and international broadcasters (7%); Telus Fund and Municipal Agencies represent the smallest contributors at 2% and 4%, as niche funding sources.

Figure 16 – Key Funding Sources for Black and Racialized Production in Ontario



N = 68

Source: Economic Impact Survey of Black and Racialized Production in Ontario, Canadian Independent Screen Fund

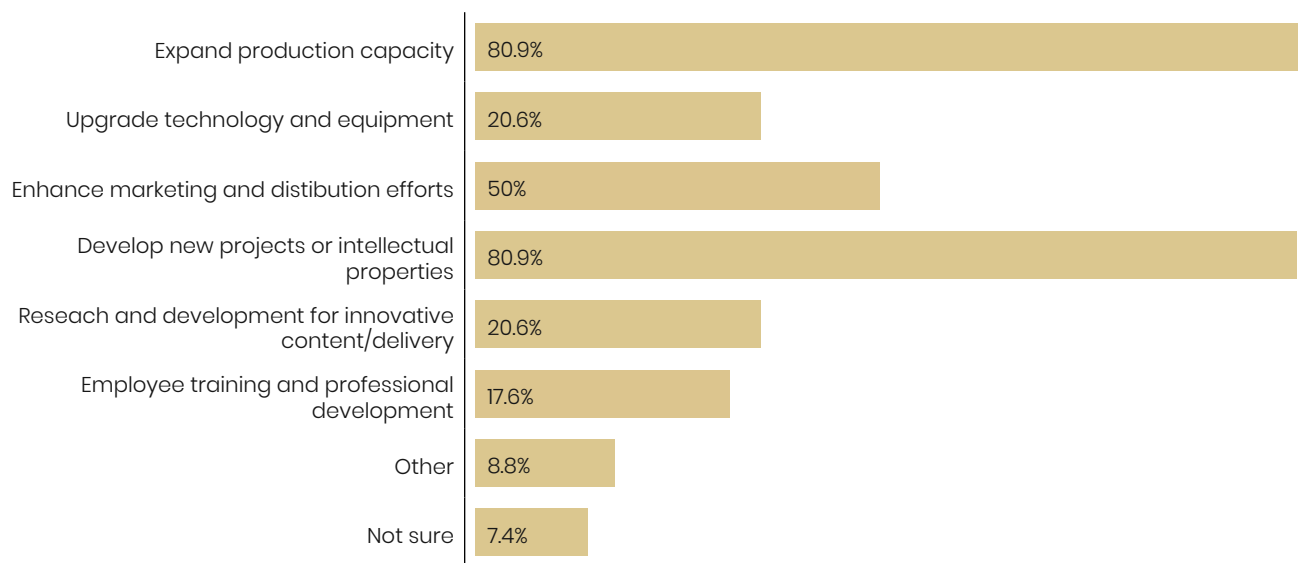
5. Outlook and Investment Priorities

The findings below provide insight into how respondent companies are positioning themselves to sustain operations and, possibly, grow within the industry over the next 3 to 5 years.

a) Future Investment Priorities: At 81% of survey respondents, both *Expanding production capacity* and *Development of new projects and IP* remain top priorities for many companies.

- *Enhancing Marketing and Distribution Efforts* of completed projects is also a top goal for 50% of survey respondents.
- *Research and development for innovative content/delivery and Upgrade technology & equipment* are each 21% of survey respondents reflecting investments in story development and IP.

Figure 17 – Top Future Investment Priorities



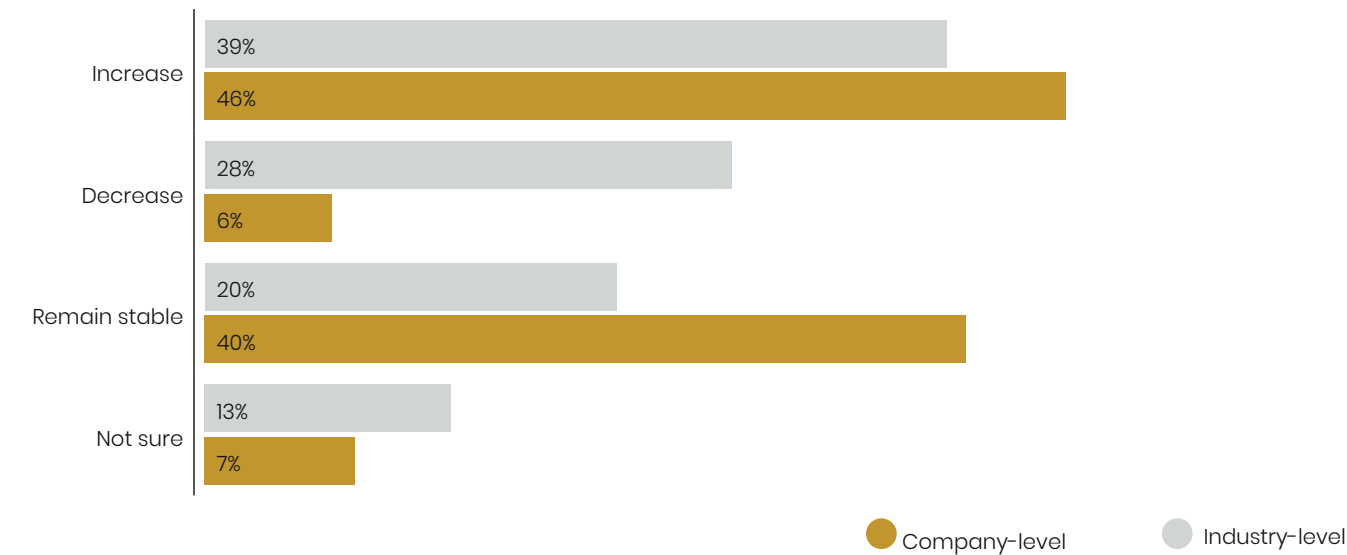
N = 68

Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

b) Expectations for Black and Racialized-Led Project Volumes

- **Black and Racialized Production Trends:** 46% of survey respondents anticipate an *Increase* in the volume of Black and Racialized projects over the next 3 to 5 years. 40% believe it will *Remain stable*, 6% *Decrease* and 7% *Not sure*.
- **Canadian Production Expectations:** Despite optimism at the company level, expectations for the overall Canadian industry are mixed. 39% of survey respondents anticipate an *Increase* in the volume of Black and Racialized projects over the next 3 to 5 years. Only 20% believe it will *Remain stable*, 6% *Decrease* and 7% *Not sure*.

Figure 18 – Company-Level & Industry-level Expectations for Black and Racialized-Led Project Volumes



N = 67
Source: *Economic Impact Survey of Black and Racialized Production in Ontario*, Canadian Independent Screen Fund

6. Key Findings – Survey

The survey highlights sustainability in Black and Racialized production in Ontario, but also reveals persistent challenges in market access, workforce maintenance and representation in key decision-making roles.

1. Black and Racialized Representation in Ontario’s Screen Industry: 84% of respondent companies are fully owned by Black and Racialized producers, also:

- Production focus is primarily domestic (51%), while 32% engage in international productions or co-productions, indicating growing global participation.
- Black and Racialized creators reflect diverse cultural backgrounds, with the largest groups being Black/African (43%) and South Asian (31%), followed by Multiracial (13%), Middle Eastern/North African (10%), and Latin American (8%).

- Key creative roles remain underrepresented, with only 31% of respondents collaborating with Black and Racialized showrunners, despite 78% working with Black and Racialized directors and 72% engaging Black and Racialized producers.

2. Production Volume & Budget Trends: Lower-budget productions are increasing, with 48% of respondents reporting production volumes under \$50,000 in 2024, nearly doubling from 24% in 2023.

- Productions between \$50,000 to \$500,000 declined, while higher-budget productions (\$1 million to \$2 million) increased from 4% to 14%, signaling a shift toward either microbudget or larger-scale projects.
- Total estimated production volume for 2023 and 2024 stands at \$25.4 million, based on budget range midpoints.
- Significant financial volatility persists, with many respondents experiencing sharp

contrasts between their highest and lowest project budgets.

3. Financial & Funding Insights: Public funding remains the dominant financing source, with CMF and self-funding leading at 47% each, followed by federal tax credits (34%), Telefilm (34%), and provincial tax credits (33%).

- Private investment and broadcaster funding remain secondary (26%), while crowdfunding (7%) and municipal grants (2%) have minimal impact.
- Black and Racialized creators remain heavily dependent on government funding, with limited access to private capital, underscoring the need for diversified funding models and stronger industry partnerships.

4. Employment & Workforce Composition: Smaller companies (5 or fewer employees) rely more on full-time permanent staff (52%), while larger companies (11+ employees) operate almost entirely on contract-based employment (80%-100%).

- 55% of companies have maintained the same workforce size since 2019, while 33% reported growth and 12% experienced declines.
- Larger companies (20+ employees) are rare and rely primarily on contract labour, highlighting a lean and project-based employment model in the sector.

5. Spending Priorities & Industry Outlook: 81% of respondents plan to expand production capacity and develop new IP in the next 3-5 years.

- Spending on Research & Development and "Other" (e.g., market expansion, post-production) surged to 58% each in 2024.
- Investment in Technology & Equipment increased from 46% to 54%, while Marketing & Distribution spending dropped from 55% to 45%.

6. Future Expectations for Black and Racialized-Led Productions: 46% of respondents expect an increase in Black and Racialized project volumes, while 40% anticipate stability.

- Industry-wide expectations are more cautious, with 39% predicting sector growth, while 20% foresee stable conditions.



3. Assessing Economic Impact

3.1 Context: Ontario's Production Landscape

Ontario's screen production industry is a critical contributor to Canada's cultural and economic ecosystem. As one of the largest production hubs in the country, the province consistently sets benchmarks for domestic film and television production. The film and television sector in Ontario is characterized by a mix of domestic productions and foreign location services (FLS). However, the estimates presented in this report focus exclusively on domestic productions to reflect the direct impact of Black and Racialized creative efforts.

Uniquely positioned to tell authentic stories that resonate both within their communities and across broader audiences, Black and Racialized creators face systemic barriers in accessing equitable funding and opportunities. In December 2024, the CMPA's *Profile 2024* underscored how declining broadcaster revenues and inflationary pressures are further straining production budgets. This landscape forms the basis from which the Black and Racialized production volume estimates for 2023 and 2024 were derived.

The production volume estimates leverage a comprehensive array of data sources to ensure accuracy and provide context:

- **Ontario Creates Production Statistics (2023):** Provided foundational insights into the province's total production volumes and economic contributions.
- **CMPA's Profile 2023 & 2024:** Served as a key resource for understanding employment and GDP impacts tied to domestic production.

- **CMF's Demographic Report (March & December 2024):** Offered critical data on the representation of Black and Racialized creators and their share of total production activity.
- **Telefilm's Annual Report (2023–2024):** Informed project-specific budgets and funding allocations.
- **CISF Economic Impact of Black and Racialized Production Survey:** Captured unique perspectives and data points directly from Ontario-based Black and Racialized creators and stakeholders.

Implications for Analysis

The estimates presented in the following sections build on the rich data landscape and contextual insights outlined above. Ontario's production landscape is marked by significant variations in project scales, funding availability, and definitions of production types (e.g., film vs. television, domestic vs. foreign). These discrepancies were accounted for through a scenario-based analysis, which explored both low and high estimate scenarios to determine Black and Racialized production share in the province. The low scenarios reflect conservative assumptions, while the high scenarios incorporate share assumptions derived from recent industry trends and survey data.

By applying scenario analysis, as well as adjusting for timing and definitional variances, this study aims to provide a realistic yet forward-looking perspective on Black and Racialized production in Ontario despite current data limitations. These estimates not only quantify the economic contributions of Black and Racialized creators but also underscore their potential to drive greater equity across Canada's screen industries. For detailed methodology and glossary of terms, please refer to the Appendices.

3.2 Production Volume Estimates

The following sub-section presents estimates of the production volume of Black and Racialized screen production in Ontario for 2023–2024, broken down by television and film. They were derived from a literature review, interviews, and insights from the CMF’s 2023 and 2024 Demographic Reports as well as their Creating Change – An Evaluation of the CMF’s Equity & Inclusion Initiatives Report, 2024. Please see Appendix D for details.

Key Assumptions:

- **Television:** Representation of Black and Racialized creators is slightly higher in the television subsector, estimated to be closer to 6 to 10%. This is due to initiatives in the CMF and broadcaster-led diversity mandates, which many interviewees expressed have helped to increase access for Black and Racialized creators in television production in recent years.
- **Film:** Representation in the theatrical feature film subsector is lower, estimated to be below 10%, likely in the range of 4–8%.
- **Foreign Location Services:** Although Ontario-based Black and Racialized producers occasionally participate in this space, their involvement rarely meets this study’s definition. Additionally, while Profile 2024 does not provide a provincial breakdown of FLS activity, Ontario Creates does, albeit on a calendar-year basis. As a result, FLS projects are excluded from this study.

Figure 19 – Scenario Estimates, Share of Black and Racialized TV & Film Production Volume, Ontario, 2023–2024

	Low Scenario	High Scenario
Television Production	6%	10%
Film Production	4%	8%

Source: Excludes Foreign Location Services (FLS). Estimates based on publicly available data from Ontario Creates Production Statistics, CMPA’s Profile 2023 & 2024, CMF Demographic Report, 2023–2024, Creating Change – An Evaluation of the CMF’s Equity & Inclusion Initiatives Report, 2024 and Telefilm’s Annual Report, 2023–2024.

After making calculated adjustments based on the assumptions above and for report timing differences, it is estimated that the total volume of Black and Racialized audiovisual production in Ontario ranges between **\$54 and \$92 million** for the 2023–2024 period. See table on page 35.

- Black and Racialized television production is estimated to range from about \$48 million in a low scenario to \$80 million in a high scenario.
- Black and Racialized film production, by comparison is smaller in volume is estimated to range from about \$6 million to \$12 million respectively.

Figure 20 – TV & Film Black and Racialized Production Volume Estimates, Ontario, 2023–2024

	Low Scenario	High Scenario
Total	\$53.9 million	\$91.8 million
Television Production	\$48.2 million	\$80.4 million
Film Production	\$5.8 million	\$11.5 million

Source: Excludes Foreign Location Services (FLS). Estimates based on publicly available data from Ontario Creates Production Statistics, CMPA’s Profile 2023 & 2024, CMF Demographic Report, 2023-2024 and Telefilm’s Annual Report, 2023-2024.

3.3 Economic Contributions

The following sub-section presents estimates of the overall economic impact of Black and Racialized screen production in Ontario for 2023-2024, in terms of FTE employment, labour spend (or compensation of employment [COE], and GDP). Please see Appendix A for a Glossary of Terms.

These estimates are derived from the economic ratios published in *Profile 2024*. To provide clarity, the impacts are categorized into direct and spin-off effects, where spin-off impacts include both indirect effects (supply chain) and induced effects (economic activity driven by re-spending).

Overall, the Black and Racialized audiovisual production sector demonstrated somewhat robust economic outcomes, with total production budgets ranging between \$53.9 and \$91.8 million.

Black and Racialized productions were supported between 547 and 949 FTEs. Of these, direct FTEs range from 400 to 694, while spin-off effects contribute an additional 147 to 255 FTEs.

- Labor income ranged from \$35.5 to \$60.9 million, of which \$22.2 to \$38.2 million was directly generated, while \$13.3 to \$22.8 million resulted from spin-off activities.

The GDP impact of Black and Racialized productions was equally notable, with contributions between **\$62.4 and \$104.3 million**.

- Of this, direct contributions ranged from \$35.7 to \$59.7 million, while spin-off impacts added \$26.7 to \$44.6 million.

Figure 21 – Total Economic Impact Estimates of Black and Racialized Production in Ontario, 2023–2024

	Low	High
Total Production Budget	\$53,930,000	\$91,840,000
Full-Time Equivalents	547	949
FTE Direct	400	694
FTE Spinoff	147	255
COE/Labour Spend	\$35,506,222	\$60,987,450
Direct	\$22,248,001	\$38,214,396
Spinoff	\$13,258,221	\$22,773,054
Gross Domestic Product	\$62,374,627	\$104,292,546
Direct	\$35,676,277	\$59,651,976
Spinoff	\$26,698,350	\$44,640,569

Source: Estimates based on publicly available data from Ontario Creates Production Statistics, CMPA's Profile 2023 & 2024, CMF Demographic Report, 2023–2024 and Telefilm's Annual Report, 2023–2024.

The Black and Racialized television production sector demonstrated encouraging economic outcomes, with a total production budget ranging between \$48.2 and \$80.4 million.

These productions supported between 489 and 830 FTEs. Of these, direct FTEs range from 357 to 607, while spin-off effects contribute an additional 132 to 223 FTEs.

- Labour income ranged from \$31.7 to \$53.4 million, with \$19.9 to \$33.4 million directly generated. An additional \$11.9 to \$19.9 million resulted from spin-off activities.

The GDP impact of Black and Racialized television productions was significant, with contributions ranging between \$55.8 and \$91.2 million.

- Of this, direct contributions accounted for \$31.9 to \$52.2 million, while spin-off impacts added \$23.9 to \$39.1 million.

Figure 22 – Economic Impact Estimates of Black and Racialized Television Production in Ontario, 2023–2024

TV BPOC Economic Impact	Final Estimates	
	Low	High
Total Production Budget	\$48,210,000	\$80,350,000
Full-Time Equivalents	489	830
FTE Direct	357	607
FTE Spinoff	132	223
COE/Labour Spend	\$31,740,311	\$53,357,378
Direct	\$19,888,302	\$33,433,436
Spinoff	\$11,852,009	\$19,923,942
Gross Domestic Product	\$55,758,961	\$91,244,622
Direct	\$31,892,329	\$52,188,984
Spinoff	\$23,866,632	\$39,055,637

Source: Estimates based on publicly-available data from Ontario Creates Production Statistics, CMPA's Profile 2023 & 2024, CMF Demographic Report, 2023–2024 and Telefilm's Annual Report, 2023–2024

The Black and Racialized film production sector showcased promising economic outcomes, with a total production budget ranging between \$5.72 and \$11.49 million.

These productions supported between 58 and 119 FTEs. Of these, direct FTEs range from 42 to 87, while spin-off effects contribute an additional 16 to 32 FTEs.

- Labor income ranged from \$3.77 to \$7.63 million, with \$2.36 to \$4.78 million directly generated. An additional \$1.41 to \$2.85 million resulted from spin-off activities.

The GDP impact of Black and Racialized film productions was notable, with contributions ranging between \$6.62 and \$13.05 million.

- Of this, direct contributions accounted for \$3.78 to \$7.46 million, while spin-off impacts added \$2.83 to \$5.58 million.

Figure 23 – Economic Impact Estimates of Black and Racialized Film Production in Ontario, 2023–2024

Film BPOC Economic Impact		
	Low	High
Total Production Budget	\$5,720,000	\$11,490,000
Full-Time Equivalents	58	119
FTE Direct	42	87
FTE Spinoff	16	32
COE/Labour Spend	\$3,765,911	\$7,630,072
Direct	\$2,359,699	\$4,780,961
Spinoff	\$1,406,212	\$2,849,111
Gross Domestic Product	\$6,615,666	\$13,047,924
Direct	\$3,783,948	\$7,462,992
Spinoff	\$2,831,718	\$5,584,932

Source: Estimates based on publicly available data from Ontario Creates Production Statistics, CMPA's Profile 2023 & 2024, CMF Demographic Report, 2023–2024 and Telefilm's Annual Report, 2023–2024

The economic impact analysis underscores the substantial contributions of Black and Racialized production to Ontario’s screen-based media sector, while also highlighting the challenges posed by data limitations. With total production volumes ranging between \$53.9 million and \$91.8 million, and GDP contributions between \$62.4 million and \$104.3 million, the analysis reveals the economic significance of Black and Racialized creators in driving industry growth.

Data Limitations: The use of estimate ranges reflects inherent data gaps in the current system. These include a lack of comprehensive race-based tracking in Canadian Audio-Visual Certification Office (CAVCO) or Ontario Creates datasets, requiring reliance on survey self-reporting and scenario-based estimates which do not adequately reflect the nuanced contributions of Black and Racialized productions. Moreover, variations in production scale, funding access, and key role representation contribute to uncertainty in precise measurements and no official data exists quantifying the total economic impact of Black and Racialized productions, making comparative analysis challenging.

Call to Action: To advance the accuracy and utility of future economic analyses, the screen sector must adopt improved data collection practices such as:

1. **Enhanced Race-Based Tracking:** Incorporate race-based identifiers, such as CMF's innovative Persona-ID into funding and CAVCO tax credit datasets, enabling granular insights into the scope and impact of Black and Racialized productions.
2. **Comprehensive Project-Level Reporting:** Implement mechanisms to identify Black and Racialized productions systematically across all funding sources.
3. **Collaborative Efforts:** Encourage organizations like CAVCO, CRTC, and provincial agencies and funders to align their data collection methodologies to ensure consistency and inclusivity.

These measures are critical for addressing systemic barriers and capturing the full economic and cultural potential of Black and Racialized productions in Ontario. The findings in this report offer a starting point for targeted interventions, reinforcing the need for better data to drive equity and innovation in Canada's screen industries.



4. Challenges and Opportunities for Black and Racialized Production in Ontario

“There have been some significant seeds planted, but we still require more energy and investment to expand reach.” (Survey Respondent)

4.1 Challenges

Survey and interview data strongly support the literature review findings, highlighting structural barriers, funding gaps, and market challenges that hinder the growth and sustainability of Black and Racialized media production in Ontario.

1. Limited Discoverability and Market Access

Black and Racialized productions struggle to achieve visibility and reach broader audiences on major digital platforms and in international markets.⁵

Impact: Interviewees and survey respondents commented that limited market access reduces the economic and cultural impact of Black and Racialized productions, limiting their growth and long-term sustainability.

“The handful of distributors available are still not really interested in Black and Racialized content and do not know how to market and sell this material.”

“The focus on Canadian content doesn’t reflect the realities of international storytelling for diasporic communities. This limits our ability to compete globally.”

2. Limited Access to Funding and Capital

Interviewees and survey respondents noted that Black and Racialized producers face significant barriers in securing adequate funding, including limited access to public funding programs like Telefilm and the CMF due to great demand.⁶ Strict eligibility requirements, high competition for targeted funds, and insufficient private equity support exacerbate these challenges.⁷

Impact: The lack of funding restricts Black and Racialized producers’ ability to finance projects, scale operations, and compete with larger, well-funded productions and production companies.

“The current system requires a broadcaster or distributor, which are both VERY difficult to secure.⁸ The entire system needs to be rethought and rebuilt.”

⁵ Testimonies from industry professionals, such as those presented during the CRTC hearings, indicate that Black and racialized filmmakers across Canada continue to face barriers hindering the reach of Black, Indigenous, and racially diverse content to broader and international audiences. Please see [November 24, 2023 hearing](#).

⁶ Respondents indicate that targeted programs like the CMF’s Program for Racialized Communities and other initiatives, while helpful, remain underfunded relative to demand.

⁷ Competition for limited diversity-focused funds disproportionately impacts smaller and mid-tier Black, Indigenous, and Racialized production companies, *DOC’s Funding Analysis for BIPOC Documentary Content in Canada*

⁸ The BSO’s Being Seen report highlights ongoing systemic biases that marginalize Black, Indigenous, and Racialized creators, limiting their roles and visibility in mainstream media, *BSO’s Being Seen: Race and Representation in Canadian Media*

“We need operational funding for employees, but funding received is only project-based. This makes it hard to grow sustainably.”

3. Systemic Biases and Institutional Barriers

Institutional biases within funding and production result in limited opportunities for Black and Racialized creators, who are often confined to niche or “diversity-focused” projects.

Impact: These barriers hinder the ability of Black and Racialized creators to tell diverse stories that resonate widely and limit their visibility in mainstream media.

“Funding goes to the ‘old boys club,’ and entry-level producers are forced to self-finance.”

“More regulation is needed to course correct systemic inequities. Ownership requirements and mandates for diverse hiring have helped but need expansion.”

4. Rising Production Costs and Market Pressures

Escalating labour costs—driven in part by an influx of foreign productions—alongside stagnant public funding and the pressure to appeal to global audiences, have placed significant financial strain on smaller Black and Racialized productions. These pressures are further exacerbated by intensifying competition for already limited resources.⁹

Impact: Smaller Black and Racialized production companies are often priced out of the market by larger, well-established studios with greater financial leverage.

“Smaller production companies can’t afford to compete with the budgets of larger studios, especially when foreign productions drive up wages.”

“Ensuring Black and Racialized producers have the tools to create authentic world class stories and, at the same time, understand the nuances of the international market and how best to position their project internationally is an important and delicate balance.”

4.2 Opportunities and Supports

The landscape of media production in Ontario offers significant opportunities for Black and Racialized creators, despite persistent systemic challenges. These opportunities, informed by survey data, interviews, and a comprehensive literature review, highlight actionable steps to ensure equity, growth, and sustainability for Black and Racialized media projects. By investing in these areas, stakeholders can catalyze a thriving, innovative, and globally competitive media production ecosystem.

Implications for the Industry: Targeted interventions—such as increased operational funding, mentorship, and access to capital and use of business strategy—could help transition companies from low-budget to mid- and high-tier production categories.

- The dominance of low-budget productions likely reflects systemic funding challenges and barriers to scaling operations for Black and Racialized companies. Tailored programs to support low-budget productions can address foundational resource constraints and enable smaller companies to grow sustainably.
- Increased access to company-level funding

⁹ CMPA’s Profile 2024 report notes that stagnant public funding fails to keep pace with inflation and rising costs, disproportionately affecting smaller productions.

can help stabilize production pipelines and enable scalability.

- To encourage larger-budget projects with compelling creative elements, stakeholders can focus on initiatives such as pre-arranged broadcaster partnerships, co-productions, and equity-driven funding mechanisms.

1. Increasing International Collaborations and Market Access

Tapping into diasporic communities worldwide further amplifies the potential reach and impact of Black and Racialized productions. Canada's treaty agreements and global partnerships provide critical pathways for Black and Racialized creators to secure larger budgets and reach diverse international audiences. Many respondents noted the importance of international markets to scale Black and Racialized projects.¹⁰

"Exporting content internationally has been pivotal in increasing visibility for our projects, but we still lack the market access and capacity support to fully explore these opportunities."

"The BSO's international delegations have opened doors, but there's a need for sustained support to solidify these partnerships."

2. Enhanced Discoverability

Improved visibility and discoverability of Canadian content on streaming platforms on digital platforms is a critical factor in elevating Black and Racialized productions. Streaming services offer opportunities for direct access to diverse audiences, bypassing traditional

gatekeepers. 48% of survey respondents rated the industry as failing to meet Black and Racialized viewer demand ("2" on a 5-point scale, with "1" being "Meeting to no extent" and "5" being "Meeting to full extent"), indicating a significant gap in representation and discoverability.

"Conducting targeted audience research and building partnerships helps Black and Racialized creators better align content with audience demands. There are barely any Black stories being told, and if they are, they're often mangled to appeal to no one."

"We need broadcasters and funders to mandate marketing and discoverability initiatives specifically for Black and Racialized creators."

3. Expanding Production Capacity and Developing New Intellectual Properties (IP)

Respondents emphasized the need for operational and business strategy support to sustain capacity between projects. Scaling production capacity and fostering the development of new projects are key to ensuring the long-term sustainability of Black and Racialized media production. Increasing production capacity allows Black and Racialized creators to scale their projects and take on more ambitious productions. This was consistently linked to the need for operational funding to support larger teams and infrastructure by respondents.

Survey respondents cited that programs such as the Program for Racialized Communities have enabled Black and Racialized creators to retain ownership and control. Additionally, 81% of respondents highlighted "expanding production capacity" and "developing new projects or IP"

¹⁰ The BSO's delegations to South Africa and the UK have fostered co-productions and global distribution opportunities.

as critical priorities.

“The biggest challenge is sustainability between projects. How do we retain back-end staff and pay ourselves?”

“Developing IP is critical for ensuring creative and financial control over our work.”

4. Strengthening Capacity Building Through Mentorship and Networking

Expanding mentorship and networking programs can provide Black and Racialized creators with industry insights, connections, and pathways to navigate systemic barriers. Respondents stressed the importance of mentorship on improving financial literacy, business management, and technical skills for emerging and mid-career creators, highlighting initiatives by Access Black and Racialized Producers and the BSO as pivotal.

“Mentorship helped me connect with key decision-makers and secure the funding needed to bring my project to life.”

“Networking opportunities have been essential for learning the business side of production.”

5. Leveraging Emerging Technologies and Innovation

Training and investments in emerging technologies like virtual production, AI, and immersive media offer cost-effective methods for enhancing storytelling and reducing barriers to entry. 21% of respondents identified upgrading technology as a key priority, with many highlighting the need for training programs.

“We’re excited about innovative tools like LED technology to enhance storytelling capabilities.”

“Access to training in new technologies is essential for Black and Racialized creators to stay competitive and tell stories in cost-effective ways.”

6. Expanding Targeted Funding and Support Programs

Targeted programs like Telefilm’s Diversity Stream and the CMF’s equity-driven initiatives have opened avenues for Black and Racialized creators to access much-needed resources. Expanding funding pools and revising eligibility criteria could amplify the success of these programs. Respondents also emphasized the importance of expanding these programs to include more inclusive eligibility criteria and company-level support.

“Programs like PBRC are a game-changer, but demand far exceeds supply.”

“We need corporate investment that allows emerging creators to build their track record without sacrificing ownership or creative control.”



5. Key Takeaways

1. Black and Racialized Productions Deliver Major Economic Contributions

Black and Racialized screen productions in Ontario are generating notable economic value. These projects contributed an estimated \$62 to \$104 million in provincial GDP and supported between 550 and 950 FTE jobs in 2024. This evolving economic footprint underscores that empowering Black and Racialized creators can create significant employment and income.

2. Public Funding Reliance

Despite their resilience, Black and Racialized production companies face financial instability, marked by a heavy reliance on public funding and unpredictable project budgets. Nearly half of survey respondents' production financing comes from government sources such as the CMF compared to only about a quarter from private investors and broadcasters.

- Budgets have polarized – in 2024, 48% of surveyed projects were under \$50,000 (double the 2023 share).
- Many producers also reported wide swings between their largest and smallest project budgets.

3. Diverse Leadership and Lean Workforces

Black and Racialized creators have a foothold as industry leaders – 84% of surveyed Ontario production companies are fully Black and Racialized-owned – yet most are small and operate with lean staff. According to survey respondents, over 50% have five or fewer employees.

4. Systemic Barriers and Rising Costs Impede Black and Racialized Producers

Black and Racialized production companies continue to confront systemic hurdles that limit their growth. Access to capital remains constrained and operating costs are rising – in part due to competition from big-budget foreign shoots driving up local labour rates – squeezing already thin margins.

- These economic pressures are compounded by non-financial barriers, as persistent industry biases often sideline Black and Racialized creators into niche genres and roles, limiting already scarce opportunities.
- Targeted support for small and mid-sized production companies (through dedicated funds or facilitating broadcaster pre-commitments), greater access to private capital and mentorship, and measures to boost content discoverability and international distribution are suggested remedies from survey respondents and interviewees.

5. Cautious Optimism Amid Industry Uncertainty

Black and Racialized producers are optimistic about expanding their output, but they remain wary of wider industry headwinds.

- A majority (81%) of surveyed Black and Racialized companies plan to increase production capacity and develop new content in the next 3–5 years, and 46% expect the volume of Black and Racialized projects to rise. However, when looking at the broader industry, only 39% of respondents foresee overall sector growth, reflecting caution due to challenges like funding constraints and market shifts.

Appendices

Appendix A:

Glossary

Black and Racialized production: For this study, Black and Racialized-led media refers to film, television and digital content that is significantly influenced, controlled and/or owned by Black and racially diverse people. These projects reflect one or more of the following conditions:

1. Ownership and Production Control: The project is produced by Black and Racialized producers or by production companies that are at least 51% owned by Black and Racialized individuals. This ownership reflects a significant Black and Racialized influence in decision-making processes and creative direction of the project.

2. Key Creative Leadership: The project has at least 2 out of 4 of the following key roles — Producer, Writer, Director, and Showrunner — held by Black and Racialized individuals. This ensures substantial Black and Racialized representation in the creative and managerial aspects of the production, influencing its narrative, execution, and overall vision.

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

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

Gross domestic product (GDP) is equal to COE, operating surplus, mixed income, and taxes on production less subsidies.

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

Spin-off economic impacts refer to the combined value of:

- i. Indirect impacts occur when production companies purchase supplies and services from other industries
- ii. Induced economic impacts occur when workers (employed as a result of direct and indirect impacts) re-spend their income across the wider economy.

Appendix B: Interview List

Interviews conducted in spring of 2024:

Ann Shin – Director & Producer, Fathom Films

Erin Creasey – Director, Industry Development;
Erin Smith – Manager, Research & Strategic
Planning; **Lisa Fiorilli** – Senior Policy Advisor at
Ontario Creates

Diego Briceno – Senior Manager, Data Equity,
Canada Media Fund

Jennifer Pun – Producer, Edge Entertainment

Joan Jenkinson – Founder & CEO, Black Screen
Office

Kadon Douglas – Producer & former Executive
Director, BIPOC TV & Film

Marcia Douglas – CEO, Bell Fund

Marguerite Pigott – Film Commissioner and
Director of Entertainment Industries for the City
of Toronto

Mathew Parry – Manager, Creative Industry
Programs, Creative BC

Shant Joshi – Producer & President, Fae Pictures

Appendix C: Survey Methodology Details

A. Data Collection & Analysis

- The survey was anonymous, ensuring that responses were provided freely without concerns about confidentiality.
- The survey was distributed by CISF, REMC, CMPA, and other partner organizations, targeting a diverse cross-section of Black and Racialized production companies in Ontario.
- A structured multiple-choice and open-ended questions were used to capture both qualitative and quantitative insights.
- Data validation checks were conducted to remove duplicate or inconsistent responses, ensuring the accuracy of reported trends.

B. Sampling & Limitations

- The survey results provide a snapshot of industry trends as of mid-2024, but may not reflect all nuances of Black and Racialized production across Canada.
- Self-reported data was cross-referenced with available industry benchmarks where possible, though some variance in budget estimations remains.
- Incomplete responses were accounted for using response-weighted calculations, reducing potential biases in production volume and employment estimates.
- While 68 respondents completed the survey, response rates varied across different questions, requiring adjustments in aggregate reporting.

C. Production Volume Estimates & Ranges Methodology

The total estimated production volume for 2023 and 2024 was derived by multiplying the midpoint of each range by the number of respondent companies within that range. This approach provides a reliable approximation of industry activity while addressing variability in reported data.

Key assumptions and processes:

- Midpoints for each production budget range were used to calculate total production value.
- Projects over \$2 million were estimated at \$3 million to standardize calculations.
- Responses categorized as “Not applicable” or “Prefer not to answer” were excluded to maintain data accuracy.

Appendix D: Methodology for Estimating Black and Racialized Production Volume in Ontario

This methodological approach was designed to estimate the production volume of Black and Racialized media productions in Ontario. The analysis utilized publicly available data, survey responses, and scenario-based modeling to generate both low and high production estimates. Key considerations included addressing data limitations, reconciling calculation methodologies, and ensuring a consistent approach to production classification.

Step 1: Data Collection and Review

- Sources Consulted: Publicly available production figures from Ontario Creates, CMPA and Statistics Canada served as foundational inputs.
- Survey Integration: Insights from the CISF survey were incorporated to enhance data granularity, particularly regarding Black and Racialized-focused productions.

Step 2: Reconciling Variance in Definitions and Timing

- Variances in reported figures were noted and attributed to differences in:
 - Timing of data collection (e.g., fiscal year vs. calendar year reporting).
 - Definitions of production types (e.g., domestic vs. foreign productions, film vs. television).
- To mitigate these inconsistencies, the analysis aligned with Ontario Creates' domestic production statistics as of April 2023, while also adjusting for the broadcast year spanning April 2023 to March 2024.

Step 3: Scenario-Based Analysis

- Scope: A scenario-based framework was applied to both the television and film production sectors, focusing exclusively on domestic production to provide a clear baseline.
- While acknowledging the presence of foreign location service productions, these were excluded from the initial scope to ensure a targeted and consistent approach.

Step 4: Production Share Estimates

- Television Production Scenarios:
 - Low Scenario: Black and Racialized production was estimated to account for 6% of Ontario's total television production.
 - High Scenario: Black and Racialized production was estimated at 10% of the total.
- Film Production Scenarios:
 - Low Scenario: Black and Racialized production was estimated at 4% of Ontario's total film production.
 - High Scenario: Black and Racialized production was estimated at 8% of the total.
- These percentages were derived from a literature review, interviews, insights from the CMF and Telefilm's Demographic Reports and *Creating Change - An Evaluation of the CMF's Equity & Inclusion Initiatives Report, 2024*, which informed the use of conservative but reasonable benchmarks.

Step 5: Economic Impact Calculations

- The production volume ranges derived from the scenarios above were used to calculate the economic impacts presented in subsequent sections. These calculations included employment, GDP contribution, and labour income estimates, ensuring consistency with industry-standard economic modeling practices.

Appendix E: Economic Impact Calculation Details

A. Estimation of Employment Full-time Equivalents (FTEs)

Direct – Calculated by estimating the share of total production volume that was paid as salaries and wages, and then dividing by an estimate of the average salary of an FTE in Ontario’s film and television production sector. The average FTE salary assumptions were based on data from Statistics Canada’s Census (2021).

Spin-off – Calculated by summing indirect and induced FTEs estimated by applying ratios derived from Statistics Canada multipliers on output, GDP, labour compensation and employment.

B. Labour Income

Direct – Calculated by multiplying the number of direct FTEs by the estimated average film and television industry cost in Ontario.

Spin-off – Calculated by multiplying the number of spin-off FTEs by an estimated, average economy-wide cost.

C. Gross Domestic Product (GDP)

Direct – Calculated by multiplying direct labour income by a multiplier that reflects the weight of wages and salaries in Ontario’s film and television production sector.

Spin-off – Calculated by applying the GDP-wage ratio used in Profile 2024 and “implied by the analysis in *Conference Board of Canada, Valuing Culture: Measuring and Understanding Canada’s Creative Economy*”.



Canadian Independent Screen Fund
for BPOC creators



Fonds Canadien de l'écran
indépendant pour les créateurs
afro-descendants et racisés