Exploring the Futures of Distribution

Strategic Visions for the Canadian Audiovisual Industry

Study conducted by La Société des demains for Téléfilm Canada
(This study is also available in French.)

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Credits and disclaimer

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Demains

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Glossary of Foresight Terms used in this report

Icebreaker activity: Introductory activity aimed at creating a relaxed atmosphere and stimulating the participation of the participants at the beginning of the workshop.

Backcasting: Strategic planning method consisting of starting from a desired future and identifying the steps required to get there by gradually working backwards to the present.

Critical uncertainties: Phenomena or trends that evolve unpredictably and that might have a major impact on the future of a sector or an industry.

2 × 2 matrix: Foresight tool used to explore various scenarios by intersecting two critical uncertainties on a horizontal and vertical axis, thereby generating four possible scenarios.

Driver of change: Factor, trend or dynamic that influences and generates significant transformations in a sector, an industry or a society. It may be technological, economic, social, political or environmental in nature, and it acts as a lever for change or evolution.

Desirable scenario: Vision of a future considered ideal or beneficial by participants, developed using the scenarios explored and fine-tuned to reflect the priorities that were identified.

Scenarios: Hypothetical narratives describing possible futures depending on the various developments in the critical uncertainties identified.

Headline of the future: Forecasting exercise consisting in imagining a futuristic newspaper article illustrating one of the scenarios to better view the implications and issues.

Introduction

As the global audiovisual landscape changes and the challenges confronting the audiovisual sector in Canada grow, it is essential to explore new approaches in order to ensure the visibility, viability and prosperity of Canadian and Indigenous films in the domestic and international markets.

With this in mind, Telefilm Canada mandated La Société des demains to conduct Foresight discussions on the future of distribution. The aim of this initiative, conducted in collaboration with other industry funding and support organizations and industry players involved in distributing, promoting and exporting films, was to identify possible solutions on both an organizational and ecosystemic scale in order to better support, develop and promote the distribution and exports of Canadian and Indigenous films.

This report presents this entire exploratory process on the future of distributing and exporting Canadian audiovisual productions, be they films or television productions. One key takeaway became increasingly clear over the course of the work, both for the participants and for the research team: to resolve distribution issues in a sustainable manner, it is essential to tackle the structural problems throughout the entire value chain, both upstream and downstream of distribution.

The following pages will help us explore how to do this.

Methodological Approach

The particularly challenging context for distribution operations necessitated an innovative approach. The determination shown by Telefilm Canada and its partners to get actively involved in each and every step, to meet with the entire industry, and to facilitate close collaboration between the parties laid the foundations for a new form of co-creation for the future of the sector.

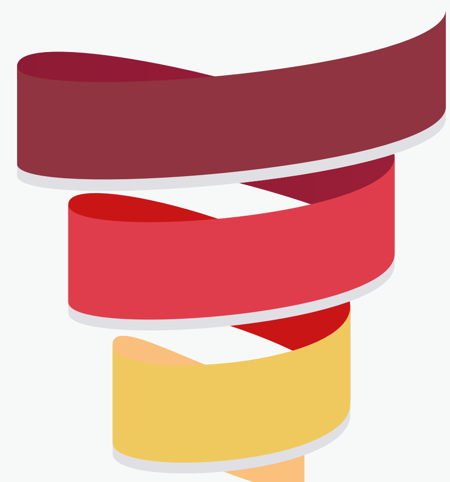
To fulfill this mandate, La Société des demains first carried out a study, using secondary sources, on drivers of change and emerging trends in audiovisual distribution. This macro-diagnosis provided input for the next steps. We then conducted a series of Foresight workshops with industry stakeholders. These sessions aimed to engage participants in identifying key transformation factors and sharing their main concerns. Participants were then guided through a co-creation process to imagine desirable future scenarios and explore potential innovative solutions. The workshops also helped lay the groundwork for an action plan for Telefilm and partners; to identify possible avenues for broader, systemic action at the public policy level.

Demains' Strategic Insights Funnel

Identify Opportunities
Recognizing potential growth areas

Stakeholder Engagement
Conduction Foresight workshops with industry leaders

Vision Alignment
Crafting a unified 5-year vision with decision-makers



Context

This exploratory process was unprecedented: First of all, the decision-makers decided to be actively involved in the research process, being present at each and every step of the process. The institutional partners and policymakers attended the various workshops as observers. At the end of the process, together they agreed to engage in the same Foresight experiment by collectively projecting themselves into a future that would be desirable for the industry as a whole.

Participants repeatedly acknowledged the value of the cross-sectorial approach. An essential observation of this process was recognizing the immense need to break down the silos between the professions, among the value chain and between sectors, in order to facilitate discussions among industry stakeholders. The workshops facilitated these meetings between film distributors and television broadcasters, for instance, or between exhibitors and TV producers. This unique mandate stimulated group discussions and teamwork on the major challenges facing audiovisual distribution, despite the turmoil in the Canadian industry.

The audiovisual distribution industry is undergoing a period of rapid change. New tools, new practices, and new global tensions are rewriting the rules of the game. To better deal with this complex situation, it's not enough to simply understand the radical changes happening before our eyes. One must also identify the sources the major transformations are rooted in to assess their multiple effects.

That is precisely what the diagram below sets out to do: highlight the major drivers of change transforming the distribution landscape – from the accelerating integration of technologies and the exponential explosion in content production to the ever-growing geopolitical tensions.

This synthesizing tool is derived from insights obtained through secondary research conducted at the initial stage of the study. The resulting in-depth market intelligence provides a robust foundation for the development of Demain's foresight workshops, grounded in empirical data reflecting the economic, social, political, and technological dynamics driving the ongoing evolution of the audiovisual ecosystem.

Based on these drivers of change, the diagram allows us to identify a series of key issues that directly impact professions in the sector, and to anticipate their material short-term effects: risks, constraints, in addition to new opportunities.

Although only a summary, the diagram provides a systemic analysis that improves our understanding of the dynamics at work, and allows us to think more strategically about the future of distribution for the longer term.

DRIVERS OF CHANGE

Technological integration

The accelerated integration of technologies such as artificial intelligence, digital broadcasting infrastructures and algorithmic systems is profoundly transforming the distribution value chain by connecting, automating and reconfiguring the roles and functions between creators, platforms and audiences.

Attention economy

The exponential abundance of content and over-solicitation of audiences are turning attention into a scarce resource, exacerbating competition for visibility and leading to decision fatigue.

Global polarization

Geopolitical tensions, protectionist policies and market concentration are profoundly altering distribution channels and complicating fair access to international markets.

	RISING ISSUES	THREAT	OPPORTUNITY
TECHNOLOGICAL	Automation, generative AI, algorithmic opacity	Reduced human involvement, algorithmic bias, loss of diversity	Optimization of broadcasting strategies, large-scale customization
TECHNOLOGICAL	Proliferation of platforms and formats	Fragmentation of audience, dilution of marketing campaigns	Expanded access, new distribution niches
TECHNOLOGICAL	Hybridization of interactive media and formats	Blurring of traditional formats, exclusion of hybrid works from funding programs	Expansion of narrative forms, access to non-movie-goer audiences
TECHNOLOGICAL	Immersive tools (AR, metaverse, domes)	Financial unaffordability, instability of formats	Creation of immersive events, enhancement of physical experience
ECONOMIC	Overlaod of offerings in a crowded attention economy	Saturation, increased invisibility of works, decision fatigue	Greater value for curatorial brands, new editorialization strategies
ECONOMIC	Direct-to-consumer (DTC)	Smaller players face marginalization; difficult to reach audiences without fame	Greater control of client relationship, better value capture
ECONOMIC	New sources of revenue (NFT, microtransactions, blockchain)	Regulatory instability, technical complexity	Revenue diversification, deeper community commitment
SOCIAL	Decision fatigue	Abandoning content search, disengagement	Creation of alternative recommendation tools, appetite for curated suggestions
SOCIAL	Back to Human Curation	Hard to Compete with Dominant Algorithms	Distributors seen as cultural tastemakers; renewed influence of festivals
SOCIAL	Global success through community (e.g.: Letterboxd)	Dependence on external viral forces, unpredictability	International distribution facilitated, cross-border recognition
POLITICAL	Geopolitical polarization/cultural regulations	Shrinking market access, censorship, restrictive quotas	Promotion of national/local content, strategy targeted by region
POLITICAL	Inadequate regulatory framework (AI, data, broadcasting)	Legal uncertainty, lack of protection for small players	Experimentation window, possible influence on future standards
POLITICAL	Cultural nationalism/quotas	Risk of reciprocal protectionism, reduced foreign offerings	Incentive to produce locally, better discoverability nationwide
ENVIRONMENTAL	Digital carbon footprint	Pressure on energy-intensive models (streaming, servers)	Promotion of responsible physical distribution channels, lightweight formats
ENVIRONMENTAL	Growing tension : innovation vs. digital sobriety	Possible disqualification of immersive innovations	Advent of a new sober and creative aesthetic, eco-responsibility as a brand value

Overview of the audiovisual distribution in Canada

Audiovisual distribution has undergone major transformations worldwide over the past decade, marked by several key trends. The emergence of streaming platforms [or Video on Demand (VOD) platforms] such as Netflix, Amazon Prime Video and Disney+ has radically changed the way in which content is distributed. These services offer consumers unprecedented flexibility, giving them access to a vast library of content on demand as well as a customized experience, but they are in turn undergoing major upheavals.

The last pandemic also profoundly changed user behaviour, overturning the traditional logic associated with the film industry, such as the importance and relevance of a theatrical release.

These major changes had an impact on the distribution market in Canada. According to Telefilm, we currently have 72 active companies involved in distribution activities in Canada: 57 of them are considered to be small, 5 are considered medium-sized and 10 large. Of these 72 companies, 24 operate in French, 29 in English, 15 are bilingual, and 4 operate in Indigenous languages. The majority of these companies are not exclusively dedicated to broadcasting; they also do production. Appendix A shows an exhaustive list of distributors identified by Canadian Heritage.

In 2021, the operating income of the Canadian distribution sector plummeted by 25%, to $1.4 billion. This decrease was largely due to the lower revenues generated by the distribution of Canadian productions, which posted a $24.8 million drop between 2019 and 2021, mainly on account of a decrease in receipts from international markets. In contrast, the distribution of non-Canadian productions dominated the industry, representing 83% of total receipts in 2021. This situation generated a wave of bankruptcies and sales among distributors, a trend that seems to be set to continue, reflecting the growing challenges faced by the industry. (Statistics Canada, 2022)

For television productions, after three years of decline in a row, television broadcasting revenues rose to $1.4 billion in 2021, up 4% compared to 2020. This increase is primarily due to the performances of private general-interest broadcasters, who were up 11%, like Société Radio-Canada (SRC), whose revenues were up 9%.

However, expenditure for Canadian independent television production continued to go down for the second year in a row, posting a drop of 4% between 2020 and 2021. This general trend masked a significant increase in expenditure for private general-interest broadcasters, who saw their expenses go up by $10 million, or 13%, their highest level in the past five years, thereby reducing their purchasing power with Canadian distributors.

These impacts are already being felt by different players, as evidenced by the distributor h264, which announced in August 2024 the end of its short film distribution operations due to lack of financing (Ross, 2024).

This report proposes a summary of the key factors for change; the priority concerns of stakeholders in the Canadian film industry; and the key ideas and other possible solutions most likely to chart strategic courses of action to ensure the viability and prosperity of the distribution and exporting of Canadian and Indigenous film content.

Structure of report:

The first chapter outlines the workshop step-by-step process and their corresponding outputs, while the second chapter presents the consolidated outcomes of stakeholder reflections, articulated as a unifying vision.

1. Workshops with the Industry

With a view to studying the distribution landscape in Canada, La Société des demains facilitated a series of Foresight workshops with industry representatives. These workshops allowed us to bring together, mobilize and consult with key players in the sector in order to get a better idea of their concerns. The workshops were conducted in three phases: the aim of the first phase was to take stock of the industry's current challenges; the aim of the second phase, to encourage the co-creation of desirable scenarios for the future of distribution; and the third phase focused on having the officers of the parapublic organizations involved draw up action plans.

Mapping the Research Journey

July-September 2024
Preliminary Source Review

August 2024
National Stakeholder Workshops

November 2024
In-Person Foresight Workshops

January 2025
Final Integration Workshops

June 2025
Final Report

The Demains workshop process, structured in a cascading format, is both educational and iterative: each phase enriches the next, allowing key insights to emerge that guide subsequent workshops and help develop solutions to strengthen the viability of the distribution sector in Canada.

In this chapter, we will be discussing the workshops with industry leaders before turning our attention to the workshop that led to the vision statement (Chapter 2)

1.1 Workshop Methodology

(Reminder: Please refer to the Glossary of Foresight Terms included after the Table of Contents, as needed.)

The first phase of workshops was held online on August 28 and 29, 2024 in the form of webinars. The first session was held in French and the second in English. These workshops brought together leaders of production, broadcasting and distribution organizations, as well as heads of professional groups and associations in the film industry. Other stakeholders from the film and television sectors, both public and private, across Canada also participated in these workshops. (See Appendix B for the complete list of participants.)

The aim of this initial meeting with industry representatives was to create a space to reflect on the future that we want for distribution in Canada. The objective of the workshops was to identify priority avenues for reflection for the development of future financing programs by Telefilm.

The webinars consisted of large-group and subgroup activities. Each subgroup had a moderator specializing in Foresight who oversaw leading the discussions. Participants were invited to participate in each activity by using the Miro platform, which facilitates collaboration through its interactive interface.

This workshop was structured around four activities. Firstly, participants made **affirmations** about the current state of distribution in Canada before challenging them with a **reversal of ideas**. Next, using a scenario created in Activity 2, each subgroup completed a **Futures triangle** featuring a plausible priority future as well as the forces influencing it. Lastly, the **best ideas** were pooled together and shared with all the participants.

The second phase of workshops was held in person on November 19 and 25, 2024. The first session was held in Montreal in French and the second, in Toronto in English. These meetings brought together representatives of the distribution industry from across Canada, the majority of whom had taken part in the webinars in August. Given that most of the activities were held in subgroups, teams were curated to ensure a broad range of perspectives at each table. Several groups contained participants from various spheres of the industry, in particular, producers, broadcasters, distributors and exhibitors. Observers also sat in with the participants. (See Appendix B for the complete list of participants.)

The aim of these in-person meetings was to create desirable scenarios for the future of film distribution, building on the ideas raised in the first phase of workshops. Once again, the composition of the teams working on the scenarios was designed to guarantee the participation of representatives from different spheres of the industry to ensure that all the distribution issues were fully integrated.

This second phase of workshops consisted of six (6) activities. Participants were first asked to participate in an individual **"learning to time travel"** exercise designed as an icebreaker to stimulate the imagination. Each subgroup then selected the **critical uncertainties** that they felt were the most significant in a list compiled from the virtual workshops in August. Using two critical uncertainties of their choice and a 2 x 2 matrix, the teams developed four **scenarios**.

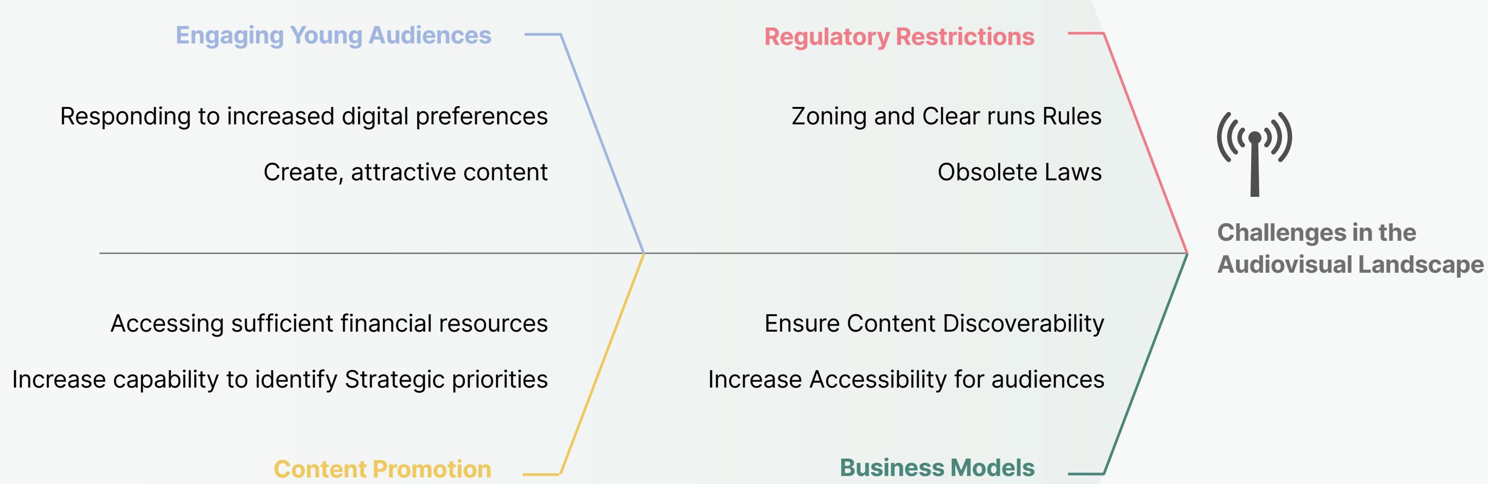
One of these scenarios was further developed in the form of "**Headline of the Future**," then analyzed using a **backcasting** exercise aimed at identifying the key steps leading to its realization. Lastly, each subgroup presented its **desirable scenario** to all the participants. These scenarios were used as a starting point while preparing for the last workshop, held in January 2025 (see Section 2).

1.2 Workshop Results

1.2.1 Virtual Workshops

The first phase of workshops was used to take the pulse of the concerns and preoccupations from representatives in the distribution ecosystem on a national scale. Generally speaking, participants pointed out shortcomings in existing regulations and systems, describing them as outdated and archaic.

In the current assumptions activity, several issues were named multiple times, emphasizing their importance for industry players. Some of these issues are: the difficulty reaching young audiences, the lack of investment in promotion, the upheaval in distribution windows, the restrictions caused by zoning and clean runs rules the development of new revenue models, as well as the discoverability and accessibility of Canadian content.



Once these issues had been identified, participants were invited to envision desirable futures. To support this process, they were encouraged to reinterpret the initial challenges as opportunities—reframing each constraint from a constructive perspective to uncover potential avenues for transformation. The following future-oriented visions emerged from this exercise and were subsequently examined in greater depth during the plenary session.

Webinar in FR – August 28, 2024

1. Canada is seeing a new generation of moviegoers, especially young people, who are actively watching and supporting Canadian films, including those in French.
2. There is enough support for getting these films distributed and promoted, which helps them reach their audiences.
3. A more balanced system in Canada, based on a more equitable distribution of financing support between the various stages of the creation and distribution chain, a renewed commitment to cinema by young audiences, and better access to Canadian content.
4. We imagine a strong, connected film ecosystem that appeals to all types of audiences, encourages ongoing support for Quebec-made films, and ensures that these works remain available and sustainable over time.
5. Films released directly on platforms will be more successful than those released in theatres.

Webinar in ENG – August 29, 2024

1. We envision a strong, nationally recognized version of Telefilm Canada (TFC), transformed into a well-designed and well-funded studio-like infrastructure. Its role would be to support the creation and visibility of a wide variety of Canadian films, both at home and internationally.
2. We have a deep understanding of Canadian audiences—their preferences, behaviors, and viewing habits—which allows us to better connect them with Canadian stories.
3. Imagine if our approach to distributing Canadian films was based on long-term planning rather than short-term results. This could lead to more stable, lasting success.
4. Government bodies like the CRTC and Canadian Heritage could take a more integrated approach to supporting Canadian content—helping not just with production, but also with distribution and exhibition, across all platforms and stages of a film's journey.
5. Instead of having a few major players dominate the film marketplace, we see a future where many equally strong distributors and exhibitors thrive. To get there: we need to reshape the financing structure/model of film production and the financing model for distribution and exhibition.

★ Observations

In these futures set out by the participants, we observe the desire for a strong distribution sector, with a long-term vision, in which Telefilm acts in conjunction with public organizations working in the film and television industry.

→ The issue of the discoverability of Canadian content also seems to be a central one: participants wanted to have a better understanding of the audience and to participate in the development of an engaged audience.

→ Export of content was mentioned during the workshops, but rarely explored in-depth. The discussion often came back to the immediate priority, which seems to be **strengthening the Canadian audience** and ensuring the success of Canadian content in the domestic market first, an already complex challenge in today's environment.

→ In light of the information collected about the concerns and priorities of the participants, we were able to establish some preliminary findings on the current state of the distribution sector under **six cross-disciplinary themes** in the audiovisual industry (cinema and television), that is, promotion, audiences, accessibility & flexibility, consistency in the value chain, digital presence and financing.

Table 1 Summary of Observations – Virtual Workshops:

Issue	Problem Identified	Possible Solutions
Promotion	Inadequate financial support, limiting the reach of marketing efforts.	Increase the promotional budget to boost the impact of marketing campaigns.
Audience	Low attraction of youth to Canadian cinema; need to analyze audience habits.	Implement school programs on national cinema and strategies for collecting data on audiences.
Accessibility & Flexibility	Major regulatory restrictions (zoning and full screen) limiting broadcasting and scheduling flexibility.	Ease regulations and business practices and provide more flexibility in timing windows in order to facilitate theatrical scheduling and televisual broadcasting.
Consistency in value chain	Lack of coordination between the players; unbalanced distribution of funds.	Greater consultation and collaboration between the players in the value chain, in particular to ensure a more balanced distribution of the financing across the various stages of a content's life cycle.
Digital presence	Insufficient visibility on digital platforms; potential loss of revenue.	Optimize the discoverability and accessibility of online content.
Distribution financing	Heavy financing process, a hindrance to innovation and risk-taking.	Simplify administrative processes and incorporate incentives for innovation.

1.2.2 In-Person Workshops

(See Appendix C for all desirable scenarios.)

The second phase of workshops was an opportunity to continue with the initial explorations on the future of distribution. The aim of the activities was to establish what – for the participants – would constitute desirable scenarios likely to respond to the issues identified in the first phase. Several key themes emerged from the discussions, revealing cross-disciplinary concerns and potential solutions to strengthen Canada's distribution ecosystem.

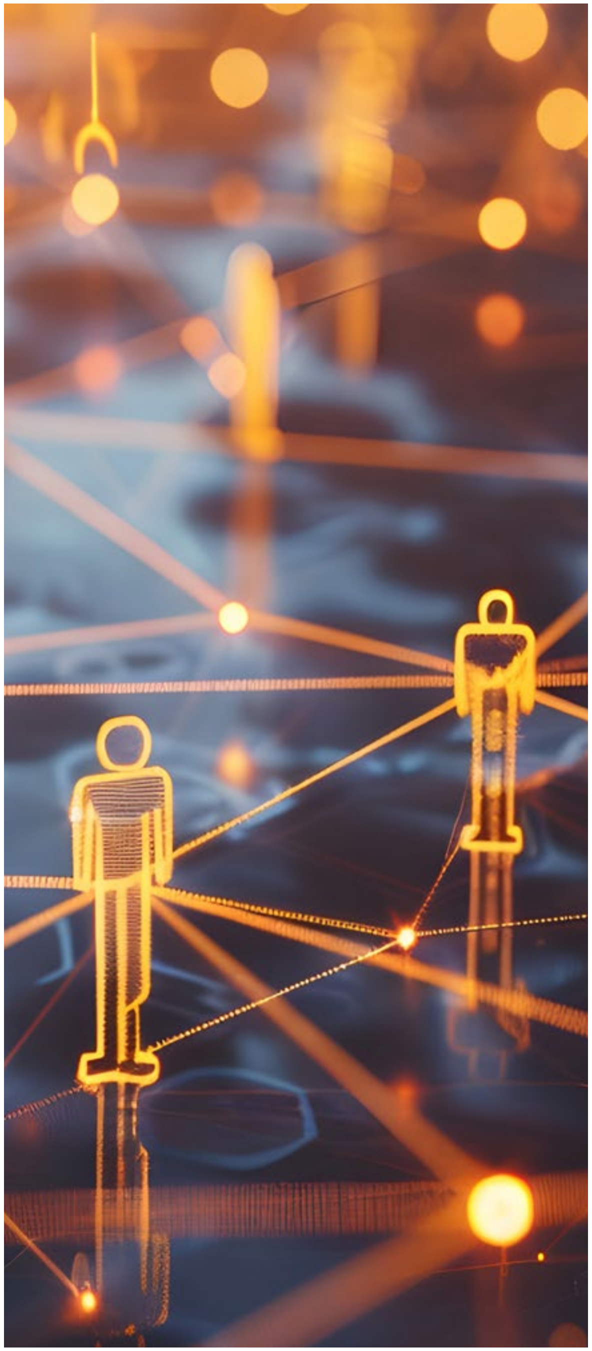
Summary:

1. A central issue: The audience

Participants unanimously stressed the importance of attracting and building the loyalty of Canadian audiences. The objective of **greater audience engagement** is at the core of the desirable scenarios, with the ambition of seeing the public respond massively to Canadian content. In particular, this means better discoverability, redesigned financing models and greater support to young creators.

2. Discoverability and flexibility in distribution

Accessibility to Canadian content must be improved through **greater presence on digital platforms and in theaters, as well as on traditional television**. Motivating regulations, such as requiring the platforms to include local content in their recommendations, were suggested. Exhibitors also asked for more flexibility in scheduling practices to encourage diversity in the films screened.



3. Financing: Diversification and ongoing support

Diversification of the sources of financing was considered essential, in particular through contributions from the streaming platforms and by taxing theatre tickets, as well as through tax incentives and public-private partnerships. The distribution of financing should also be redesigned to more fairly support the film throughout its life cycle and in particular at the promotion and distribution stages.

4. Development of young audiences and emerging talent

Canadian content education and awareness were seen as priorities. Participants recommended implementing **financial incentives for youth production**, as well as initiatives in the schools to familiarize students with Canadian cinema. The idea of **talent incubators** was also put forward to familiarize young people with Canadian content on film, television and digital platforms..

5. Promotion and adapted marketing strategies

The promotion of Canadian content requires more adapted resources. **Better data collection and analysis** was considered essential to fine-tuning marketing strategies. Getting influencers involved and creating **digital communities** around Canadian content were also suggested as levers for modernizing promotion.

6. Technology and data: Strategic tools

A greater use of technology appears to be an imperative, for both **analyzing audiences** and **facilitating access to production and distribution tools**. Artificial intelligence and predictive analysis were identified as solutions for adjusting the film offerings to audience expectations.

7. Cooperation and governance: an ecosystemic approach

The need for **greater collaboration between sector players** was a central point of the discussions. Greater coordination between the production, distribution and promotion stages was desired, as well as better synergy between the various public agencies. **More concerted action in representing the interests of the audiovisual industry across the country, with a greater presence for the interests of the film sector** was proposed to defend the interests of the sector and structure efforts in the long term.

Summary of ideas shared in the workshops:

A few recurring ideas brought up by several participants

- An “introduction to Canadian film culture” program in the schools
- Rethink timing windows (concept of full screen and zoning)
- Create consistency between the various stages of the value chain
- Rebalancing the theatrical distribution ecosystem (Cineplex monopoly)
- Capitalize on use of data
- Distribute the responsibility for discoverability more equitably across the value chain.
- Canada as an example on the international scene
- Capitalize on the events-focused nature of cinema (meetings between filmmaker and audience)

Exploring or suggestions for unprecedented partnerships in the industry

- Stimulate and multiply collaborations between the major television broadcasters.
- Create a multidisciplinaty working group or think tank that brings producers, distributors, exporters, promoters and theatres together.

1.3 Towards an Integrated Vision of Distribution

All of the ideas collected up to this point in the process emphasize the fact that distribution cannot be seen as an "independent activity" or a mere stage in the value chain. Discussions at the in-person workshops and the scenarios that emerged from them indicate that the challenges are not limited to distribution itself, but that they encompass dysfunctions at all levels of the value chain.

Distribution must therefore be seen as an **interdependent ecosystem**. A holistic approach integrating each link in the value chain is essential to ensuring a sustainable and lasting transformation of the Canadian distribution system.

In this context, it seems essential to reconsider the objectives that were set at the beginning of this mandate. We were looking for possible solutions to strengthening audiovisual distribution in Canada; but observations are leading us to acknowledge that the issues are inherently linked to the very architecture of the industry, necessitating a more in-depth analysis and strategic overhaul. **In other words, we need to consider reforms that go beyond superficial adjustments to distribution processes**.

If we decided to tackle just the distribution stage on its own without taking into account the broader systemic and structural problems in the industry, we risk generating a number of negative consequences. Here are a few:

→ **Ineffective solutions:** The changes made by dealing only with the distribution stage could prove to be ineffective because they would only treat the symptoms and not the root causes of the problems. For example, improving distribution channels without addressing obsolete regulations might not meet the real needs of the market or the expectations of today's and tomorrow's consumers.

→ **Lack of sustainability:** Solutions that focus only on distribution could have a short-term effect! They run the risk of quickly becoming obsolete as the industry evolves, as new technologies emerge, and as consumption patterns continue to change.

→ **Missed opportunities:** Ignoring the upstream (production, financing and development) and downstream (consumption, discoverability and audience engagement) aspects of the value chain may generate increased fragmentation, with different parts of the value chain operating in silos, reducing collaboration and overall efficiency.

2. Workshops with decision-makers

In this second chapter, we turn our attention to the third workshop, which marked a key step in the process: for the first time, the decision-makers in the distribution sector and at the public audiovisual institutions – including funding agencies (Telefilm, Canada Media Fund (CMF)), Indigenous Screen Office (ISO) and the National Film Board (NFB) – actively participated in a Foresight and co-creation exercise. Rather than waiting patiently for the conclusions of the study before deliberating in camera, they were invited to react to the scenarios that came out of the previous workshops, to examine their perspectives and to identify together the first concrete steps of an action plan tailored to their organizations. This unprecedented initiative laid the foundations for a more concerted and proactive approach to the future of distribution in Canada.

2.1 Action Plan Workshop methodology

Using the data collected during the second phase of workshops and the eleven desirable scenarios drafted by the subgroups (see previous section), four composite scenarios were created to launch the third phase of workshops. (See Appendix D for these final scenarios.)

Constructing these composite scenarios proved to be revealing because the themes that came out of the discussions once again showed the cross-disciplinary nature of the concerns and solutions to be implemented in the distribution sector in Canada. The participants' holistic view helped us see the future of distribution as part of a whole.

With this material in hand, we held the third and final workshop, in Ottawa in January 2025, on the sidelines of the Prime Time event. This workshop brought together people in decision-making positions in parapublic organizations in the audiovisual industry, that is, the NFB, Telefilm Canada, the CMF and the ISO. (See Appendix B for the list of participants.)

The first part of the workshop was conducted in subgroups made up of representatives of various organizations, facilitating cross-disciplinary reflection on distribution issues. Each team was assigned one of the four composite scenarios that came out of the previous workshops. Using the texts provided, participants were invited to design a key initiative and to try to identify all the impacts and repercussions.

At the end of this exercise, all the participants collectively determined the three **preferred scenarios to prioritize** from among those developed in the subgroups. These scenarios were then classified in a time-horizon matrix, which allowed short-, medium- and long-term priorities to be defined.

In the second part of the workshop, participants grouped themselves by organization in order to propose their own approach to achieving the objectives of the scenarios selected. In particular, each team drafted a "**Headline of the future"** describing the key points of its strategy for making the shared vision a reality.

2.2 Workshop Results

Since the first part of the workshop was structured according to the composite scenarios presented to the participants, the results of the discussions can be analyzed through the discussions about the four main themes – discoverability, the financing model, audience development, and governance and collaboration – which made it possible to highlight common issues and converging courses of action.

2.2.1 Discoverability: A Better Understanding of Audiences

Enhanced discoverability of Canadian content depends on better collection and analysis of audience data. Participants emphasized the need for a **collaborative approach** allowing the sharing of information among the various organizations in the sector. Such coordination would ensure a more effective strategy for reaching audiences and maximizing the impact of Canadian content.

2.2.2 Financing Model: Diversification and Contribution of Platforms

A review of the financing model seems to involve diversifying the sources of revenues. All parties agree that the current CRTC process to involve streaming platforms in the audiovisual ecosystem remains a priority in creating domestic funds dedicated to supporting the sector's operations. However, participants have also met the challenges related to this measure, including potential resistance from platforms and the complexity of Canadian content certification.

2.2.3 Audience Development: A National Strategy for Young Audiences

Audience development has been identified as a key lever for ensuring the industry's future. Discussions have pinpointed the need for **a national strategy for young audiences**, conducted in a coordinated manner by public bodies. Better coordination among agencies would maximize the impact of initiatives to develop audiences.

In addition to this particular focus on raising the awareness of homegrown content among young audiences, participants also expressed a strong desire to **reach out to audiences** in general. On this point, there was talk of guaranteeing increased Canadian content on a digital platforms, as well as of stimulating more and more *offline* meetings between the industry and communities of movie-goers at movie theatres and various cultural venues.

2.2.4 Governance and Collaboration: Towards a Centralized Organization

Discussions on governance have led to a proposal to **create a centralization of resources in the audiovisual sector**, capable of ensuring a better distribution of resources throughout the value chain. Although the idea of merging organizations has been put forward to simplify the process for companies in the industry and to establish clear objectives and performance indicators to guide the allocation of funds more effectively, participants are also aware of the risk of excessive concentration of powers and a loss of diversity in approaches.

2.2.5 A Consensus: Alignment and National Strategy

Even though each theme addressed has its own unique characteristics, a clear consensus has emerged regarding **the alignment of agencies and the implementation of a national strategy**. This need for collaboration goes beyond just the players in the film sector and concerns **the entire audiovisual industry**.

Given these recurring observations, **governance and collaboration** were selected as the common theme to direct the rest of the workshop and structure future actions.

Conclusion

Towards a structured modernization of the Canadian audiovisual distribution landscape

This report highlights the profound changes in the audiovisual distribution landscape in Canada. The rise in digital distribution is disrupting traditional models, multiplying broadcasting platforms and changing consumer habits. This market fragmentation complicates distribution strategies and requires industry players to adapt rapidly.

Furthermore, windowing remains a central issue. The evolution of streaming platforms towards shorter broadcast windows creates tensions with traditional models, highlighting the need for new agreements to reconcile the protection of theatrical cinema and television broadcasting with the public's changing expectations.

The discussions in different workshops – online and in person – converge on a common observation: Canada's existing regulatory frameworks and systems are now obsolete and inadequate for the current realities of the globalized and largely digital market. Modernizing these frameworks is becoming an absolute priority in order to ensure the sector's competitiveness and viability. It is not only a matter of adapting the regulations to digital distribution, but also of rethinking the entire value chain, both upstream and downstream, to ensure a consistent and effective approach adapted to the new dematerialized distribution context.

The future of Canada's audiovisual industry will depend on a holistic and concerted **industrial strategy focused on audiences**. This strategy must address two aspects deemed essential in all the discussions:

1. Preparing tomorrow's audiences: A condition for the Canadian audiovisual industry's survival

The first concerns the **development and engagement of future audiences**. In a market saturated with international content, it is no longer enough to produce quality Canadian works. There still needs to be an audience there to receive them, and appreciate and support them. This requires concerted action to stimulate the interest of young generations, as early as when they are at school, to strengthen their attachment to Canadian stories and creators, and to offer them easier access to Canadian content. Without this mobilization, there is a high risk of seeing national productions relegated to a marginal niche, unable to compete with the massive offerings of global platforms. **Investing in audience development is therefore a strategic imperative; without them, the Canadian audiovisual industry will quite simply be unable to exist in the long term**.

2. Canadian narrative diversity: A major asset for export

The second pillar of the strategy should aim at strengthening exports and the global reach of Canadian and Indigenous productions. If the priority is still to increase their visibility and impact on the local market, it is just as essential to invest, starting today, in the main competitive advantage of Canadian film and television: **the richness and diversity of Canadian stories**.

It is these stories – rooted in an immensely vast and rich land with a complex history and plural identities that are open to the world – that can captivate an international audience, and they already do so.

It is difficult for Canada to compete with the power of the U.S. audiovisual industry by adopting the same strategies. Rather than entering an impossible race, it must focus on what makes it unique: the richness and diversity of its perspectives. In a globalized audiovisual landscape where stories are multiplying but also tending to become uniform due to standardized consumer preferences, originality becomes a key competitive advantage. A dynamic and exportable industry relies on the vitality of its independent voices and the ability of its creators to tell unique stories, driven by a singular vision.

This is also why support for independent producers is essential: It strengthens the diversity of the stories and ensures that Canadian content has a real power of attraction on the international scene.

Clear Priorities for Public Policies and Reforms

This vision of an **integrated and collaborative national strategy** must, however, be accompanied by certain structuring measures that will make it possible to strengthen audiovisual distribution, taking into account technological changes, the needs of creators and market requirements. In particular, it will have to:

Reform the regulations[1] to ensure a modern and flexible framework, aligned with new distribution dynamics.

Rethink windowing strategies by balancing the protection of movie theatres and easy access to content on digital platforms.

Promote consultation between industry players to ensure better coordination of initiatives and investments.

Develop tools to measure and analyze the sector's performance in order to clarify strategic and political decisions.

Implement an education and audience development strategy in order to build a sustainable and engaged audience for Canadian content.

The future of Canadian audiovisual industry therefore depends on a complete transformation of the political and regulatory framework, but also on a strong commitment to education and raising the awareness of audiences. Implementation of a concerted and inclusive national strategy is essential to supporting these developments and securing a dynamic, competitive and resilient ecosystem.

1 It would be relevant to explore the issue of *industrial diplomacy*, because certain standards and regulations, such as Zoning or Clean runs rules require not only the involvement of Canadian politicians and agencies, but also coordination with American studios and foreign digital platforms. Plus, the experience of Bill C-11 highlights the importance of initiating a multilateral dialogue with all the players concerned from the very beginning of the regulatory reforms to ensure effective and concerted implementation.

Appendices

Appendix A - List of Canadian Distributors[2]

(Source: Documents submitted by Telefilm Canada/originating from Canadian Heritage)

Company	Company Activities	Primary Language Market	Catalogue Size	Location	Company Size
9 Story Media Group	Production, Distribution	Anglais / English	4 400 demi-heures de programmes télévisés d’animation et d’action en direct / 4,400 half hours of animation + live action TV programming	Toronto	Grande / Large
10th Ave Productions	Production, Distribution	Anglais, français / English, French	19 longs métrages + séries télévisées / 19 feature films + TV series	Québec	Petite / Small
Acéphale Inc	Distribution, Agrégateur / Aggregator	Français/French	33 longs métrages / 33 feature films	Montréal	Petite / Small
Aetios Productions Inc.	Production, Distribution	Français/ French	150 heures de contenu varié / 150 hours of diverse content	Montréal	Petite / Small
Amuz Distribution	Production, Distribution	Anglais, français / English, French	20 séries télévisées / 20 TV series	Montréal	Petite / Small
ASD Global Media	Distribution	Autochtone / Indigenous	500+ heures de programmes télévisés / 500+ hours of TV programming	Ottawa	Petite / Small

2 The last update of this list dates back to 2023–24. It is possible that by the time of publication, some of the listed companies may no longer be active.

Company	Company Activities	Primary Language Market	Catalogue Size	Location	Company Size
ATO Media	Production, Distribution	Français/ French	10 séries télévisées / 10 TV series	Ottawa	Petite / Small
Attraction	Production, Distribution	Anglais, français / English, French	8 000 heures de programmes télévisés / 8,000 hours of TV programming	Montréal	Moyenne / Medium
Avanti Groupe	Production, Distribution, Radiodiffuseur / Broadcaster	Anglais, français / English, French	100 heures de programmes télévisés / 100 hours of TV programming	Montréal	Petite / Small
Axia Films	Distribution	Français/ French	210 longs métrages / 210 feature films	Montréal	Petite / Small
AZFilms	Production, Distribution	Français/ French	80 longs métrages / 80 feature films	Montréal	Petite / Small
Banger Films	Production, Distribution	Anglais / English	20 longs métrages, séries, spectacles en direct / 20 feature films, series, live shows	Toronto	Petite / Small
Blue Ant Media	Production, Distribution, Broadcaster/ Radiodiffuseur	Anglais / English	7 000 heures de programmes télévisés / 7,000 hours of TV programming	Toronto	Grande / Large
Blue Ice Pictures	Production, Distribution	Anglais / English	21 longs métrages + 40 séries télévisées / 21 feature films + 40 TV series	Toronto	Petite / Small
Boat Rocker Media	Production, Distribution	Anglais / English	9 000 demi-heures de programmes télévisés / 9,000 half hours of TV programming	Toronto	Grande /
Cineflix	Production, Distribution	Anglais / English	6 000 heures de programmes télévisés / 6,000 hours of TV programming	Toronto	Large
Ciné Télé Action	Production, Distribution	Anglais, français / English, French	6 longs métrages, 10 mini-séries, 3 séries + 4 documentaires / 6 feature films, 10 mini series, 3 series + 4 documentaries	Montréal	Grande /
Cinémas Guzzo Inc.	Distribution, Radiodiffuseur / Broadcaster	Français/ French	10 cinémas qui proposent des projections et des services de *streaming* / 10 theatres that provide screenings and streaming services	Montréal	Large

Company	Company Activities	Primary Language Market	Catalogue Size	Location	Company Size
Cinema Politica	Distribution, Radiodiffuseur / Broadcaster	Anglais, français / English, French	Plus de 600 longs métrages / Over 600 feature films	Montréal	Petite / Small
ECHO MEDIA	Production, Distribution	Anglais, français / English, French	12 films + séries télévisées / 12 film + TVT series	Montréal	Petite / Small
Elevation Pictures	Distribution	Anglais / English	304 longs métrages / 304 feature films	Toronto	Petite / Small
Encore Télévision-Distribution	Production, Distribution	Français/ French	600 heures de programmes télévisées / 600 hours of TV programming	Montréal	Petite / Small
Entertainment One Canada (purchased by US-owned Lionsgate 2023)	Production, Distribution	Anglais / English	Bibliothèque de 20 000 titres de films et de programmes télévisés dans la société mère américaine Lionsgate / 20,000 title film + TV library in US parent company Lionsgate	Toronto	Petite / Small
Entract Films	Production, Distribution	Français / French	138 longs métrages / 138 feature films	Montréal	Petite / Small
Eyesteelfilm.com	Production, Distribution	Anglais / English	s. o.	Montréal	Petite / Small
Farpoint Films	Production, Distribution	Anglais / English	Plus de 60 longs métrages + séries télévisées / over 60 feature films + TV series	Winnipeg	Petite / Small
Filmoption International	Production, Distribution, Agent commercial / Sales agent	English, French / Anglais, français	151 longs métrages + 115 émissions de télévision / 151 feature films + 115 TV shows	Québec	Petite / Small
Films We Like	Distribution	Anglais / English	Presque 500 longs métrages / Almost 500 feature films	Toronto	Petite / Small
Fuica Films Picture	Production, Distribution	Anglais, français / English, French	5 longs métrages / 5 feature films	Québec	Petite / Small
FUNFILM	Distribution	Français / French	80 longs métrages / 80 feature films	Montréal	Petite / Small
h264	Distribution, Aggregator/ Aggrégateur	Français / French	100 à 200 courts métrages / 100-200 short films	Montréal	Petite / Small

Company	Company Activities	Primary Language Market	Catalogue Size	Location	Company Size
gametheoryfilms	Distribution	Anglais / English	54 longs métrages / 54 feature films	Toronto	Petite / Small
Happy Camper Média	Production, Distribution	Anglais, français / English, French	Animation	Québec	Moyenne / Medium
Immina Films	Distribution	Français / French	7 longs métrages / 7 feature films	Montréal	Petite / Small
Incendo	Production, Distribution	Anglais / English	80 longs métrages + 7 émissions de télévision / 80 feature films + 7 TV shows	Montréal	Moyenne / Medium
IsumaTV	Distribution, Radiodiffuseur / Broadcaster	Autochtone / Indigenous	7 800+ films	Montréal	Petite / Small
K-Films America	Distribution	Français/ French	158 long métrages / 158 feature films	Montréal	Petite / Small
KO Distribution	Production, Distribution	Anglais / English	19 émissions de télévision / 19 TV shows	Montréal	Petite / Small
La Distributrice	Distribution	Français / French	100 longs métrages / 100 feature films	Montréal	Petite / Small
LaRue Entertainment	Distribution	Français / French	16 séries télévisées / 16 TV series	Toronto	Petite / Small
Les Films du 3 Mars	Distribution	Français / French	228 longs métrages / 228 feature films	Montréal	Petite / Small
lesfilmsopale	Distribution	Français / French	38 longs métrages / 38 feature films	Montréal	Petite / Small
levelFILM	Distribution	Anglais / English	480 longs métrages / 480 feature films	Toronto	Petite / Small
Maison4tiers	Distribution	Français / French	67 longs métrages / 67 feature films	Montréal	Petite / Small
Métropole Films	Distribution	Anglais, français / English, French	Plus de 2000 longs métrages (en rapport avec Mongrel, avec même index de films?) / Over 2,000 feature films (related to Mongrel as same film index?)	Montréal	Petite / Small
Migizi Distribution (distribution arm of Eagle Vision)	Production, Distribution	Autochtone / Indigenous	30 longs métrages / 30 feature films	Winnipeg	Petite / Small

Company	Company Activities	Primary Language Market	Catalogue Size	Location	Company Size
Minds Eye Entertainment	Production, Distribution	Anglais / English	60 longs métrages + émissions de télévision / 60 feature films + TV shows	Regina	Petite / Small
Mongrel Media	Distribution	Anglais / English	Plus de 2000 longs métrages (en rapport avec Métropole, avec même index de films?) / Over 2000 feature films (related to Metropole as same film index?)	Toronto	Petite / Small
Muse Entertainment	Production, Distribution	Anglais / English	800 heures de programmes télévisés / 800 hours of tv programming	Montréal	Petite / Small
National Film Board of Canada	Production, Distribution	Anglais, français / English, French	Plus de 14 000 films et programmes télévisés / over 14,000 film + tv programs	Montréal	Petite / Small
Omnifilm Entertainment	Production, Distribution	Anglais / English	43 séries télévisées / 43 TV series	Vancouver	Grande / Large
Orange Medias	Production, Distribution	Français/ French	4 longs métrages / 4 feature films	Montréal	Petite / Small
Photon Films	Distribution	Anglais / English	180 longs métrages / 180 feature films	Toronto	Petite / Small
Pink Parrot Media	Distribution	Anglais / English	32 longs métrages + séries télévisées / 32 feature films + TV series	Quebec	Petite / Small
Prodigy Pictures	Production, Distribution	Anglais / English	17 longs métrages + séries télévisées / 17 feature films + TV series	Toronto	Petite / Small
Quiver Distribution	Distribution	Anglais / English	130 longs métrages / 130 feature films	Toronto	Petite / Small
Raven Banner Entertainment	Distribution	Anglais / English	20 longs métrages / 20 feature films	Toronto	Petite / Small
Reel One Entertainment	Production, Distribution	Anglais / English	400-500 longs métrages / 400-500 feature films	Montréal	Petite / Small
La Ruelle Films	Production, Distribution	Anglais, français / English, French	10 longs métrages / 10 feature films	Montréal	Grande / Large
Seventh Screen	Distribution, Sales Agent commercial / Sales agent	Autochtone/ Indigenous	7 longs métrages / 7 feature films	Gatineau	Petite / Small
Sinking Ship	Production, Distribution	Anglais / English	26 séries télévisées / 26 TV series	Toronto	Petite / Small

Company	Company Activities	Primary Language Market	Catalogue Size	Location	Company Size
Sphere Media Productions	Production, Distribution	Anglais, français / English, French	32 longs métrages + 39 séries télévisées / 32 feature films + 39 TV series	Montréal	Moyenne / Medium
Spira	Production, Distribution	Français/ French	106 longs métrages / 106 feature films	Québec	Petite / Small
Syndicado	Distribution, Agent commercial / Sales agent	Anglais / English	650 longs métrages / 650 feature films	Toronto	Petite / Small
Téléfiction	Production, Distribution, Marketing	Français / French	Plus de 30 séries télévisées et longs métrages / Over 30 TV series + feature films	Montréal	Petite / Small
Trio Orange	Production, Distribution	Français / French	113 séries télévisées / 113 TV series	Montréal	Grande / Large
TVA Films	Distribution	Français / French	Plus de 100 longs métrages / over 100 feature films	Montréal	Grande / Large
Vortex Media	Production, Distribution	Anglais / English	100 longs métrages / 100 feature films	Toronto	Petite / Small
VVS Films	Distribution	Anglais, français / English, French	300 longs métrages / 300 feature films	Montréal	Petite / Small
White Pine Pictures	Production, Distribution	Anglais / English	52 longs métrages + séries télévisées / 52 feature films + TV series	Toronto	Petite / Small
WildBrain	Production, Distribution	Anglais / English	13 000 demi-heures de programmation / 13,000 half hours of programming	Toronto	Grande / Large
Zone3	Production, Distribution	Anglais, français / English, French	Plus de 18 000 heures de programmes télévisés, de films et de contenu numérique / over 18,000 hours of TV programming, film, and digital content	Montréal	Petite / Small

Appendix B - List of organizations present at the workshops

Webinar in FR – August 28, 2024

Group 1

- Natyf
- Maison 4:3
- Alliance des producteurs francophones du Canada
- Sphère Media
- Association des propriétaires de cinémas du Québec

Group 2

- Isuma Distribution International
- La Maison du Cinéma
- Disability Screen Office (DSO)
- Radio-Canada
- L'Association des documentaristes du Canada (DOC)

Group 3 - Chloé

- Cineplex Pictures
- Immina Films
- Indigenous Screen Office
- h264
- Cinéma Public

Group 4

- Cinéma Beaumont
- Les Films du 3 mars
- Télé-Québec
- Idéacom International
- Les Films Outsiders

Group 5

- Les Films Opale
- ONF
- franC doc
- TV5

Webinar in ENG – August 29, 2024

Group 1

- Isuma Distribution International
- Black Screen Office
- Movie Theatre Association of Canada
- Hollywood Suite
- Indiecan Entertainment
- Bell Media

Group 2

- Disability Screen Office
- Cineplex Pictures
- CBC
- Band With Pictures Inc.
- Boat Rocker Media
- Elevation Pictures

Group 3

- Network of Independent Canadian Exhibitors (NICE)
- Indigenous Screeno Office
- Paramount+
- Documentary Organization of Canada | Association des documentaristes du Canada
- APTN
- Office national du film du Canada | National Film Board of Canada

- **Group 4**
- Fox Theatre, ByTowne Cinema, Apollo Cinema
- Mongrel Media
- Vortex Media
- Blue Ant Media
- Karma Film

Group 5

- The Royal Theatre
- Landmark Cinemas
- Level Film
- TLN Media Group
- Conquering Lion Pictures

Montreal Workshop in FR – November 19, 2024

Group	Organization	Type
1	Radio-Canada	Broadcaster
	Les Films du 3 mars	Distributor
	La Maison du Cinéma	Exhibitor
	Québec Cinéma	Festival/ Distributor
	Idéacom International	Producer
	Téléfilm Canada	Observer
2	Télé-Québec	Broadcaster
	TVA Films	Distributor
	Cinéma Beaumont	Exhibitor
	franC doc	Producer
	AQPM	Observer
3	KOTV	Producer
	Natyf	Broadcaster
	Maison 4:3	Distributor
	Association des propriétaires de cinémas du Québec	Exhibitor
	Téléfilm Canada	Observer

Group	Organization	Type
4	Québecor Contenu	Broadcaster
	Isuma Distribution International	Distributor
	Cineplex Pictures	Exhibitor
	Alliance des producteurs francophones du Canada	Producer
	Fonds des médias du Canada	Observer
5	h264	Distributor
	Cinémas Beaubien, du Parc et du Musée	Exhibitor
	Les Films Outsiders	Producer
	ONF	Distributor
	PCH	Observer

Toronto Workshop in ENG – November 25, 2024

Ottawa Decision-makers' Workshop – January 29, 2025

Canadian Heritage	Telefilm	Canada Media Fund and Indigenous Screen Office	National Film Board
3 representative	4 representatives	2 representatives (CMF) 1 representative (ISO)	2 representatives

Appendix C – Desirable Scenarios

Montreal Workshop in FR – November 19, 2024

Title: Record historique de consommation de contenu canadien [All-time consumption record of Canadian content]

Subtitle: Au Canada, en salle et sur les plateformes, les publics sont aux rendez-vous et favorisent naturellement les productions d'ici [In Canada, audiences are flocking to movie theatres and multi- platforms, naturally favouring homegrown productions]

Title: Renouvellement du public pour les contenus francophones [Renewed audience enthusiasm for French-language content]

Subtitle: Motion pour budget fixe de Téléfilm pour 20 ans [Motion for 20-year fixed budget for Telefilm]

Title: Nombre record d'auditoire [Record audience numbers]

Subtitle: Le modèle canadien de distribution: un exemple à suivre! [The Canadian Distribution Model: Leading by example!]

Title: Les européens s'inspirent du modèle québécois [Quebec model emulated by Europeans]

Subtitle: Le renouvellement du public québécois fait l'envie des autres. Comment y sommes-nous arrivés? [Renewed enthusiasm of Quebec audiences is much envied. How did we do it?]

Title: Performance du contenu canadien qui cartonne au domestique et à l'international [Canadian content a smash hit at home and abroad]

Toronto Workshop in ENG – November 25, 2024

Title: Canadian Companies Have a Greater Impact on the Global Content Marketplace

Subtitle: Even Canadians are watching.

Title: Canada Has the Hottest Film Industry in the World

Subtitle: Investments pouring in for the Canadian Film Industry

Title: Canadian Distribution Sets a New Bar: A Model of Independence and Inclusion Subtitle: Canadian-owned companies that have innovative ways of reaching global markets.

Title: More Canadians Consuming More Canadian Content Than Ever Before!

Subtitle: Canadian Content lights up screens, big and small, worldwide.

Title: Canadian Franchise Bon Cop Bad Cop Revolutionizes CanCon Industry Subtitle: Canadian mega hit redefines industry standard across production and audience reach.

Title: Canadian Films Dominate Domestic Box Office

Subtitle: Homegrown productions outperform international films across all platforms

Appendix D – Composite Scenarios

1. Discoverability

In 2035, Canadian audiovisual content is enjoying unprecedented reach. New legislation imposes streaming platforms to systematically promote Canadian works, while movie theatres benefit from a more flexible scheduling thanks to a framework and review of the system of “zones” imposed by exhibitors and full-screen rules. A dedicated social network transforms the viewing experience by creating virtual communities where spectators and creators meet, discuss and participate in hybrid events. Audience data, analyzed in real time and shared between funding bodies, producers and broadcasters, makes it possible to fine tune the production and promotion of works and to better reach their target audiences. This alliance between cutting-edge technology and creativity positions Canadian films as a world leader in entertainment.

2. Financing model revisited for Canadian films

In 2035, a new financing model is propelling Canadian films to new heights. This new support includes a national fund, financed by a tax on digital platforms and the box office to provide balanced funding for the entire film creation chain. A technological innovation fund, the result of a public-private partnership, ensures the technical excellence of productions. A large majority of Canadian films produced in recent decades are available to the general public on various broadcasting platforms (TV or streaming) thanks to non-exclusive licensing agreements. Financial incentives are provided by parapublic institutions for the production and distribution of films for youth, helping to build loyalty among young audiences. In this new model, the success of a work is now assessed according to three criteria: commercial performance, cultural influence and audience engagement.

3. Developing new audiences

In 2035, a new generation of movie-goers and creators is emerging thanks to a national film education strategy. Starting in primary school, young Canadians discover their filmmaking heritage and explore audiovisual occupations through innovative educational programs. A network of incubators, supported by public funds dedicated to youth production, transforms emerging talent into accomplished creators. The democratization of production tools is paving the way for a new wave of young filmmakers, redefining the standards of Canadian creation and helping to build loyalty among young audiences.

4. Governance and collaboration

In 2035, the Canadian film industry achieves an unprecedented level of cohesion thanks to a major restructuring of its governance. A central organization now coordinates the entire film value chain, from production to distribution, eliminating the administrative overlaps of the past. A powerful industry lobby, the result of a decade of mobilization, effectively defends the interests of the sector with public and private bodies. This new unified structure ensures equitable distribution of resources and rallies all players around a common vision of Canadian films of tomorrow.

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