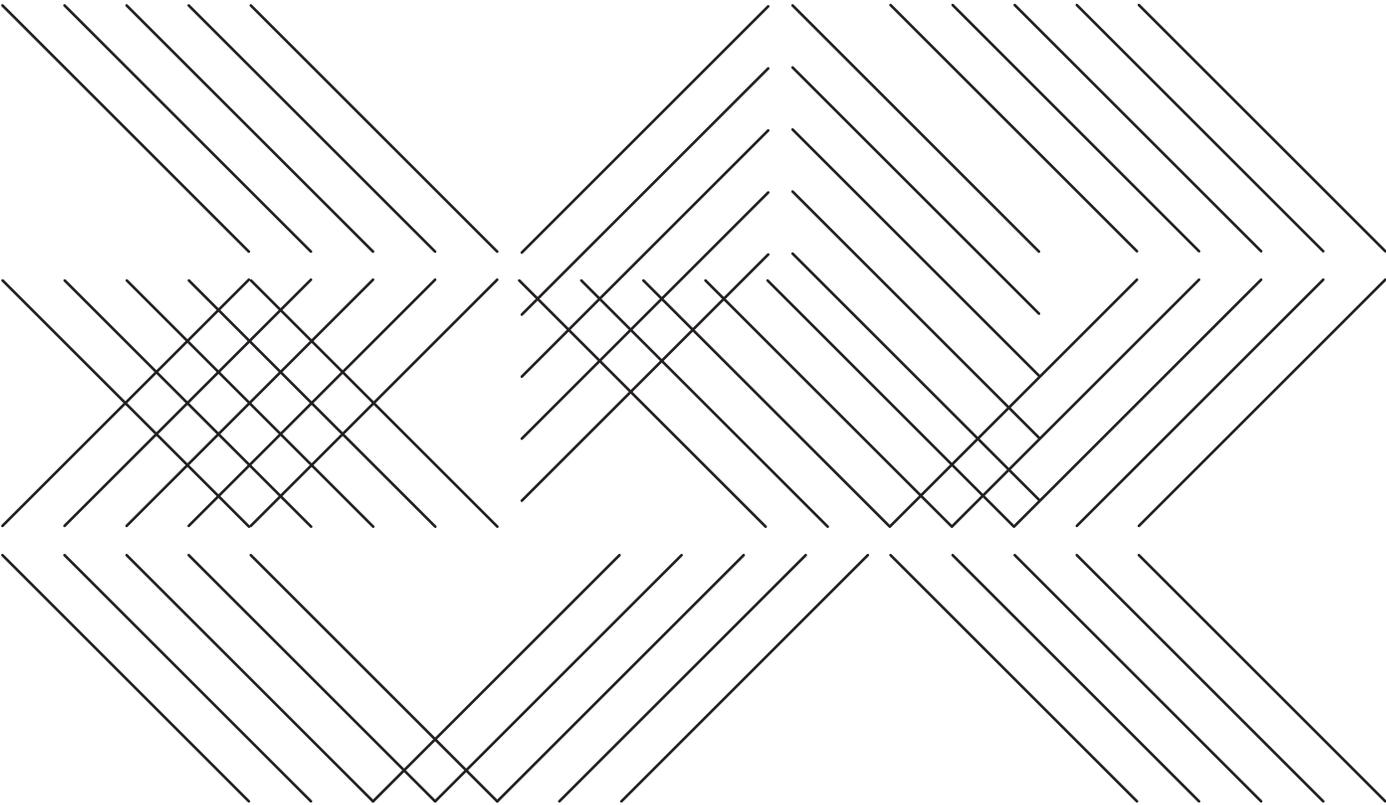

**PATHWAYS TO THE INTERNATIONAL MARKET
FOR INDIGENOUS SCREEN CONTENT:
SUCCESS STORIES, LESSONS LEARNED
FROM SELECTED JURISDICTIONS
AND A STRATEGY FOR GROWTH**



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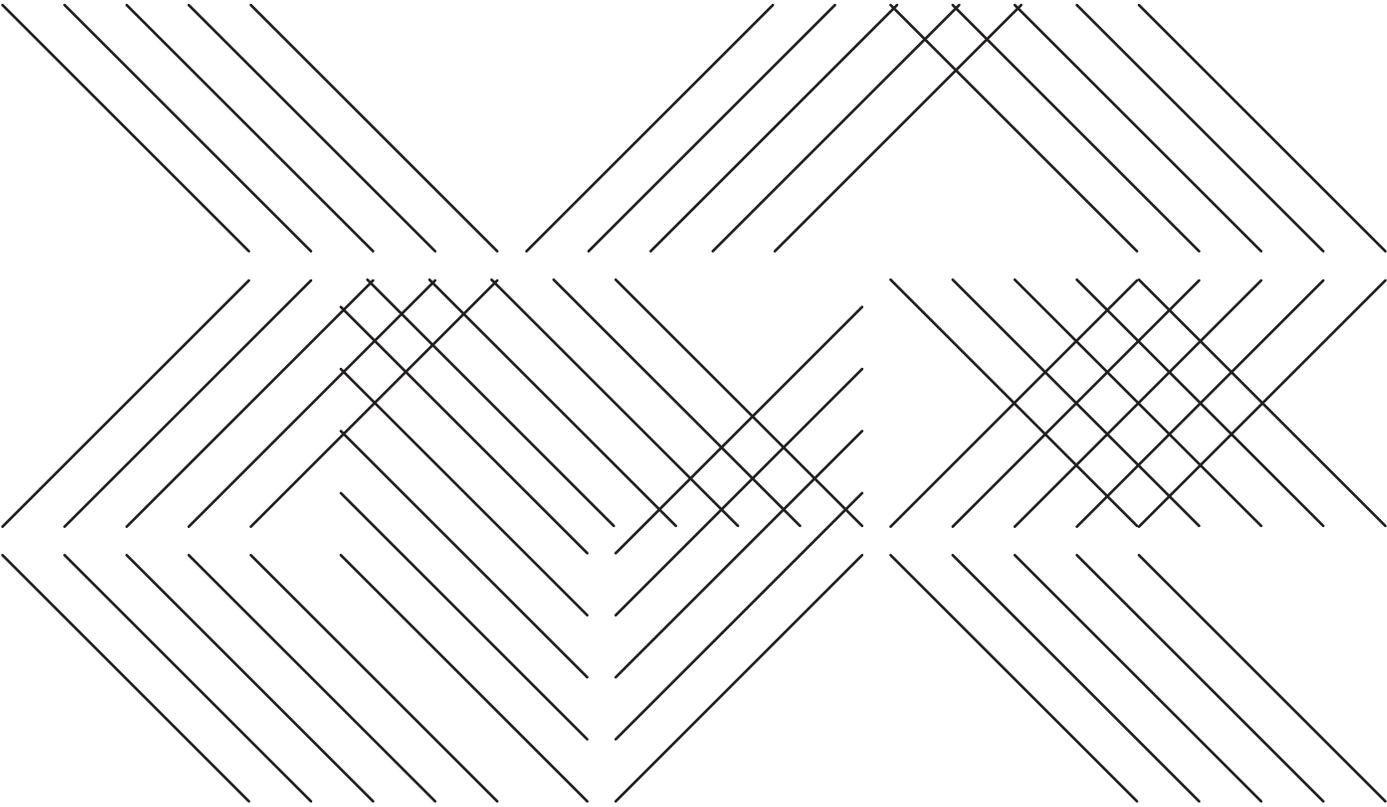
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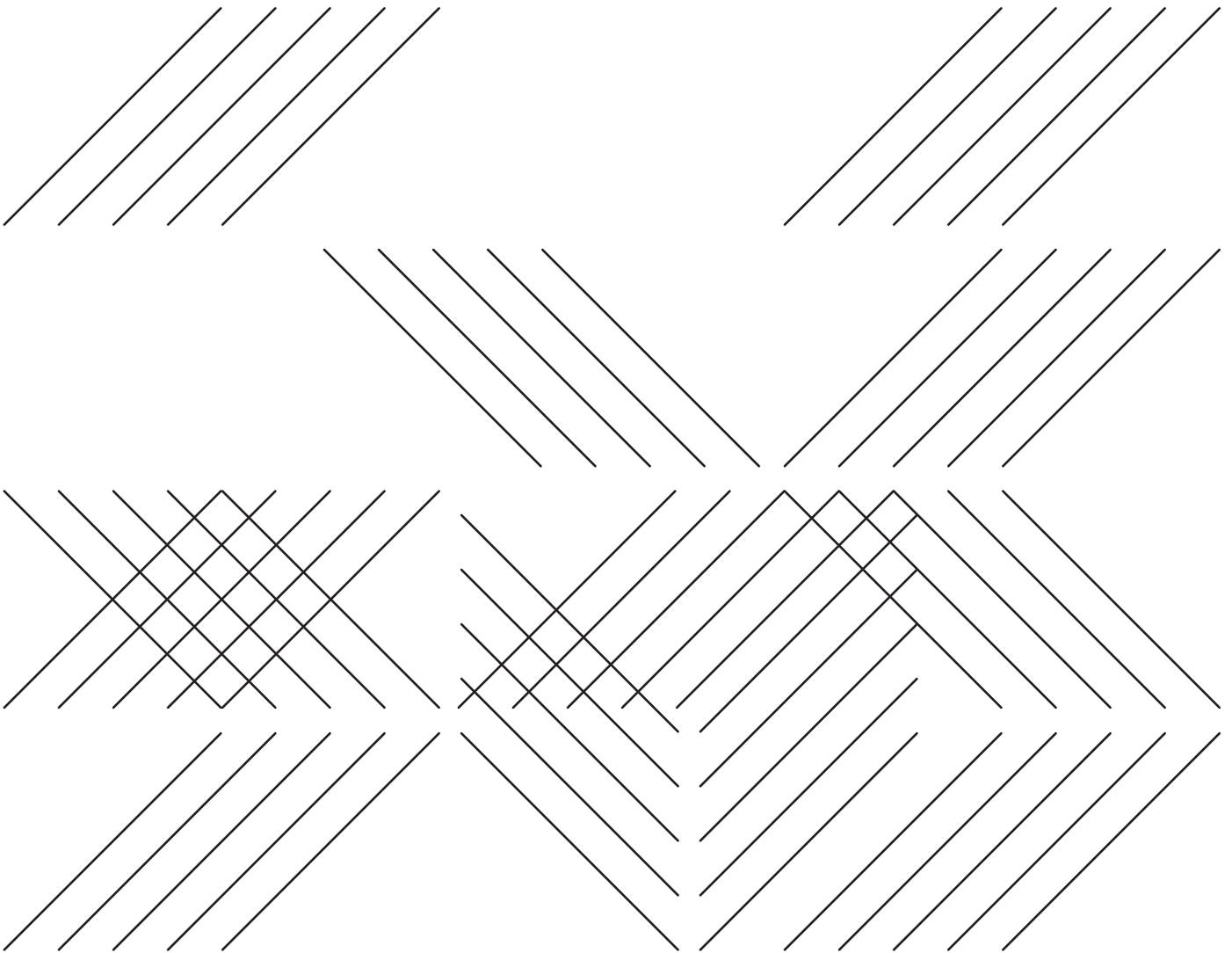
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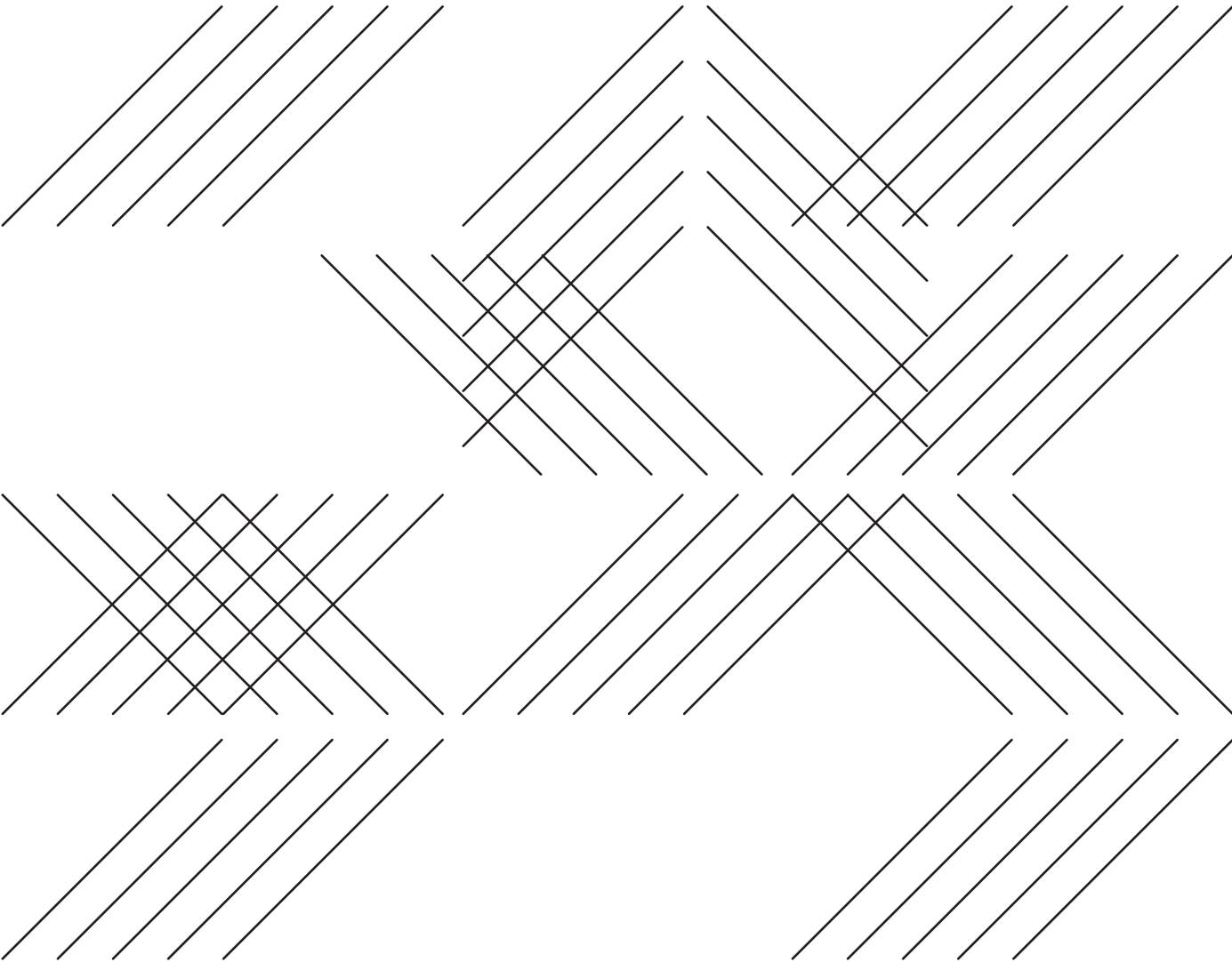


WE WISH TO THANK ADRIANA CHARTRAND, INSTITUTE COORDINATOR FOR IMAGINENATIVE FOR HER CONTRIBUTION TO THIS REPORT. AS AN INTERN ON THE CONSULTING TEAM, ADRIANA'S PROFESSIONALISM, DEEP KNOWLEDGE OF THE INDIGENOUS SCREEN-BASED SECTOR AND HER DEDICATION WERE INSTRUMENTAL TO THE SUCCESS OF THIS REPORT. SHE CONTRIBUTED TO THE RESEARCH AND WRITING OF THE CASE STUDY ANALYSIS OF THE SUCCESS STORIES FEAT-URED IN THIS REPORT, PROFILES OF CANADIAN CREATORS, THE ANALYSIS OF THE ON-LINE SURVEY, AS WELL AS GENERAL OTHER RESEARCH.

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ANY OPINIONS, FINDINGS, CONCLUSIONS OR RECOMMENDATIONS EXPRESSED IN THIS MATERIAL ARE THOSE OF THE AUTHOR AND DO NOT NECESSARILY REFLECT THE VIEWS OF THE INDIGENOUS SCREEN OFFICE, THE CANADA MEDIA FUND (CMF), ONTARIO CREATES, TELEFILM CANADA, AND THE NATIONAL FILM BOARD OF CANADA (NFB). THE FUNDERS, THE GOVERNMENTS OF ONTARIO AND CANADA AND THEIR AGENCIES ARE IN NO WAY BOUND BY ANY RECOMMENDATIONS CONTAINED IN THIS DOCUMENT.

FOREWORD



On behalf of imagineNATIVE, I am pleased to present this report on the findings of a major examination of Indigenous screen-based content internationally, the factors contributing to its success and lessons for the Canadian context.

As the largest Indigenous screen festival in the world, imagineNATIVE is committed to supporting the development of our talented Indigenous creators and promoting their work to audiences at home and abroad. The results of the consultation with our fellow festivals around the world reveal a growing demand for Indigenous screen content. Last year over 400,000 people around the world attended festivals that featured Indigenous screen stories and the number of festivals dedicated to Indigenous content is growing.

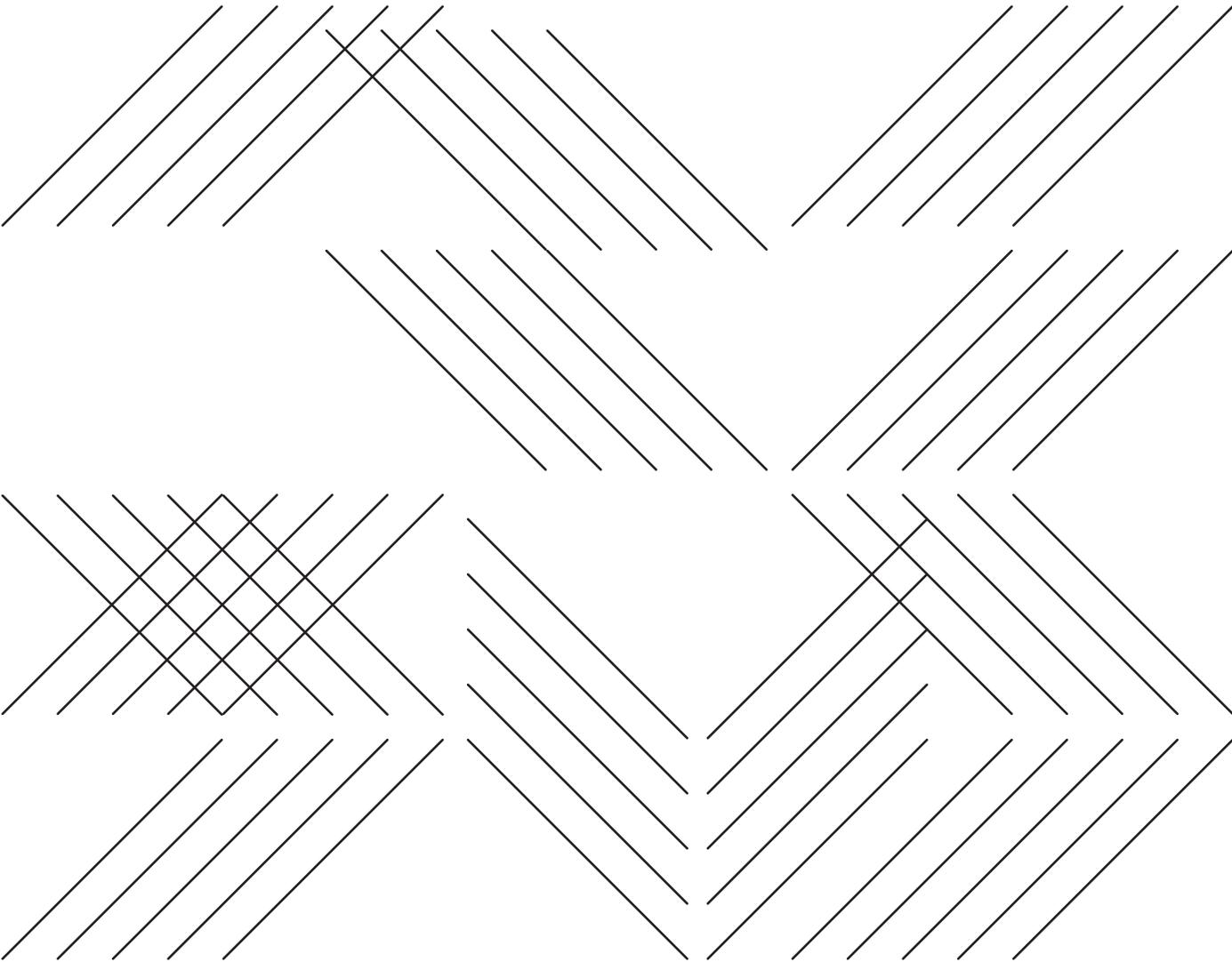
As this report shows, festivals are the leading promoters, exhibitors and celebrators of Indigenous screen productions, and imagineNATIVE has played a key role as a global leader in providing opportunities for international gatherings, dialogues and events for the screen-based production sector. This work is achieved in collaboration with our many friends and partners worldwide: artists, buyers, decision-makers and audiences. There are a growing number of international festivals dedicated, as we are, to growing our industry.

Indigenous stories are being told in ways that resonate with audiences everywhere, at deep human levels, and the opportunities for these works will continue to grow in the international market for years to come. We believe there are numerous opportunities for promoting Canadian Indigenous screen content internationally and connecting our creators to wider audiences everywhere. However, there remains much to be done. The imagineNATIVE Institute is excited to be supporting the development of talented Indigenous creators through this study, which provides potential pathways for consideration by our industry, based on the success stories and lessons learned from other jurisdictions examined for this report.



Jason Ryle,
Artistic & Managing Director,
imagineNATIVE

INTRODUCTION



1. The Overall Context

Within the context of the increasing appeal of Indigenous screen-based content worldwide, imagineNATIVE, with funding from the Indigenous Screen Office, Ontario Creates, Telefilm Canada the National Film Board and the Canada Media Fund, commissioned Communications MDR to develop lessons learned from the successes of the Indigenous screen-based sector internationally to support the growth of Canada's Indigenous screen sector. It has been noted that the industry is "evolving worldwide and gaining recognition and appreciation. Along with New Zealand, Australia and the United States, Canada is considered one of the key sources of Indigenous screen-based media."¹

The report that follows is aimed at furthering the growth of the Indigenous screen-based sector internationally, stimulating production, fostering innovation and promoting collaboration.

2. Approach and Methodology

A review of selected national and international literature on the state of screen-based media created by Indigenous people was conducted in order to profile the success of Indigenous screen-based content. Case studies were conducted of popular productions drawn from both Canadian and international examples. Where possible, data on box office receipts, audience reach, sales and awards were included in these case analyses. Brief profiles were also developed of productions and initiatives to illustrate the vitality of the sector. Please see Annex 1 for the study's bibliography.

Thirty Indigenous festivals and alternative distribution networks in Canada and abroad were surveyed to better understand the presentation of Indigenous screen-based content at these events. It is important to point out that many Indigenous films experience success first at international film festivals and then at the box office in their domestic markets. Annex 2 provides a summary of the results of the survey.

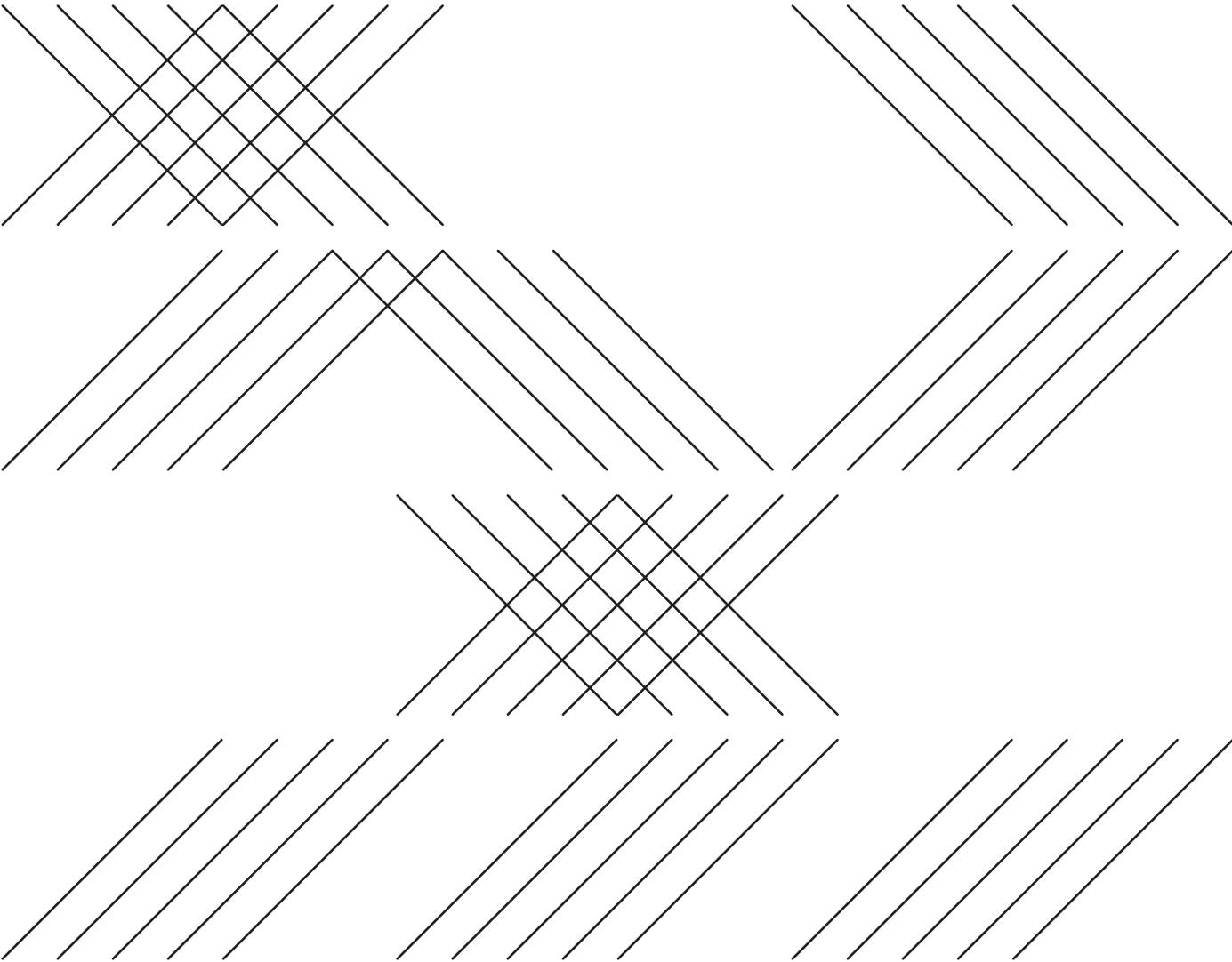
Telephone interviews were conducted with thirty-one stakeholders in Canada and internationally to support the development of a strategy that will expand opportunities for Canadian Indigenous screen-based productions in the global market. The consultants interviewed producers, broadcasters, and representatives from festivals, funding agencies and training institutes. Interviews with producers also supported the development of the case studies Please see Annex 3 for a list of people interviewed.

3. Structure of this Document

This report is divided into the following four sections:

- I. The New Context: A Rising Tide of Indigenous Productions
- II. Success Stories: Case Studies of Canadian and International Films, Television Programs and Digital Media
- III. Lessons Learned From the Success of International Indigenous Screen Content
- IV. Pathways to the International Market for Consideration by the Indigenous Screen Sector in Canada

I. THE NEW CONTEXT: A RISING TIDE OF INDIGENOUS PRODUCTION



Over the past two decades, international jurisdictions with sustained public investment in Indigenous production overseen by Indigenous people have given rise to a wide array of work that is immensely popular with audiences, and ensured an international reputation for Indigenous creators. In recent years, Australia, New Zealand and the Nordic Region have celebrated a string of box office and tele-vision hits. These successes, combined with the growing visibility and appeal of Indigenous content at international festivals are contributing to what some have called a “rising tide” of Indigenous screen content.

For its part, Canada, too is contributing to this exciting era of opportunity through the creation of the Indigenous Screen Office, together with support from its national funders and the leadership provided by Aboriginal Peoples Television Network (APTN) as the most important commissioner of award-winning Indigenous content. The Canada Media Fund is providing about \$8M annually on independently produced Indigenous language television programs. APTN is accessing a broadcaster envelope of about \$7M annually, also from the Canada Media Fund. Telefilm Canada provides funding for Indigenous film development, production, promotion and marketing. This includes a minimum of \$4M per year through its Indigenous Production Stream which covers all budget levels of production including the Indigenous components of its Talent to Watch Program for micro-budget features, shorts and webisodes. There is also a targeted Indigenous Development envelope for features that contains a mentorship component². In 2017-2018, a total of \$5.1 million was awarded to Indigenous projects (creative docs, short animation and interactive/immersive works) for development or production³. An additional \$2 million in funding was awarded to Indigenous content involving Indigenous directors⁴. For its part, the NFB is currently involved in 28 Indigenous-directed projects. In 2017, Indigenous-directed projects represented 9.5% of the NFB’s overall production spending.

Recently, Canada’s national funders committed to renewed efforts to support Indigenous production. As part of the historic doubling of the Canada Council’s budget from 2016 to 2020, the Council has tripled resources available to Indigenous artists, including those working in media⁵. With this in mind, this study examines the success factors of international productions, with the aim of providing relevant lessons to maintain the momentum that Indigenous content is building in Canada and spur its success abroad. In 2017 the NFB launched a three-year Indigenous action plan, committing it to increase its spend on Indigenous directed projects to 15% of global production spending and enhancing access and engagement with its Indigenous collection. This year, the CMF announced its partnership in the Arctic Indigenous Film Fund, launched at the International Sami Film Institute. For its part, Telefilm announced a new partnership with the International Sami Film Institute and the Nunavut Film Development Corporation to encourage and fund one international coproduction from the Arctic region.

The vibrancy of the sector is assured thanks to the work of established producers with an impressive track record of award-winning films, television programs, and digital media content made over the last decade, growing audience awareness and demand for authentic Indigenous screen content, and continual renewal through opportunities aimed at new generations of Indigenous storytellers created by the CBC, the National Screen Institute, Telus Storyhive in Western Canada and Indigenous festivals across the country.

Clearly, Canada’s Indigenous screen sector is poised for growth. While there is growing support in Canada for Indigenous production, there is a need to better understand the strategies that have helped create a pathway in other jurisdictions, to support new opportunities for growth and sustainability of Indigenous screen-based production in Canada.

1. A DEVELOPED INDIGENOUS INDUSTRY AROUND THE WORLD

In recent years, the number of award-winning and commercially successful Indigenous productions has exploded, building momentum in the Indigenous production sector and fuelling interest from broadcasters and distributors. This work garners annual selections and prestigious awards in the world’s top festivals, as

well as commercial success at home. Australia and New Zealand have emerged as leaders in producing a consistent and growing body of compelling and high-quality Indigenous work.

Maori films are said to be the most successful New Zealand films, both domestically and internationally⁶. The strength of New Zealand's Maori film sector is evident in the number of Māori films leading the way at the New Zealand box office⁷. Four of the country's top ten box office earners of all time are Maori productions, featuring Maori stories.

In Australia, Indigenous films have led the box office repeatedly, while breakthrough drama series continue to capture significant audience shares. Indigenous creators feature amongst the country's most high lauded artists.

HUNT FOR THE WILDERPEOPLE NEW ZEALAND (2016)

- Highest grossing domestic film of all time in New Zealand
- \$10,455,593 CAD domestic box office
- \$4,077,690 CAD foreign box office
- Edinburgh International Film Festival, Audience Award
- Sundance Film Festival, Audience Award
- Audience Award Best Narrative Feature, Montclair Film Festival

Source: Case Study

TOP NINE BOX OFFICE HITS FROM AUSTRALIA AND NEW ZEALAND

Title	Domestic Gross Sales	Foreign Gross Sales	Total
<i>Gross Sales in Canadian Dollars, Not Adjusted for Inflation</i>			
<i>Boy</i> (New Zealand, 2010)	\$8,818,952	\$11,305,777	\$20,124,729
<i>The Sapphires</i> (Australia, 2012)	\$13,500,188	\$4,852,882	\$18,353,070
<i>Hunt for the Wilderpeople</i> (New Zealand, 2016)	\$10,455,593	\$4,077,690	\$14,533,283
<i>What We Do in the Shadows</i> (New Zealand, 2014)	\$2,639,116	\$5,619,790	\$8,258,906
<i>Once Were Warriors</i> (New Zealand, 1994)	\$5,828,571	\$2,118,788	\$7,947,359
<i>Bran Nue Dae</i> (Australia, 2009)	\$7,280,640	n/a	\$7,280,640
<i>Samson and Delilah</i> (Australia, 2009)	\$4,000,000	n/a	\$4,000,000
<i>Sweet Country</i> (Australia, 2016)	\$1,902,896	n/a	\$1,902,896

Data drawn from case studies developed for this report.

POPULAR AUSTRALIAN TV SHOWS - SEASON ONE AVERAGE VIEWERSHIP AND BUYERS

	Main Broadcaster	Second Broad-caster/Platform	All Platforms	Buyers
<i>Redfern Now</i> (2012)	1,050,000	n/a	1,050,000	France TV
<i>Mystery Road</i> (2018)	846,000	246,000	1,092,000	Acorn TV, USA
<i>Cleverman</i> (2016)	300,000	69,000	369,000	BBC3

Data drawn from case studies developed for this report.

2. GROWING POPULARITY OF INDIGENOUS CONTENT AT INTERNATIONAL INDIGENOUS FESTIVALS

The audiences for Indigenous content at festivals worldwide is significant and growing. The festivals surveyed for this report attract over 400,000 people to their events each year. Indigenous content features prominently at these festivals and for many, constitutes the primary body of work presented.

Major international festivals now have dedicated Indigenous programming streams, including the Berlinale (Berlin), the Hawaii International Film Festival (Honolulu), Hot Docs (Toronto), Reel Canada (Toronto/Canada), the Sundance International Film Festival (Park City, Utah), and the Sydney Film Festival (Sydney, Australia).

The two largest festivals uniquely focused on Indigenous productions, imagineNATIVE Film + Media Arts Festival and the Maoriland Film Festival are growing, while other major festivals from Toronto to Sundance to Berlin are increasing their Indigenous programming. For its part, the NATIVE strand at the Berlinale, and its presence at the European Film Market are “going from strength to strength.”⁸

Canadians are very engaged with Indigenous screen content. imagineNATIVE Film + Media Arts Festival (Toronto) is the largest Indigenous festival worldwide, presenting over 200 Indigenous screen-based productions to an audience of over 25,000 people. Festivals and screening series dedicated to presenting Indigenous content exist across Canada, from Vancouver to Edmonton, Winnipeg, Toronto, Montreal and more.

WORLDWIDE REACH OF INDIGENOUS FILM FESTIVALS

- Over 400,000 festival attendees
- 6 festivals featuring Indigenous content have a reach of over 25,000 people
- imagineNATIVE – over 25,000 festival attendees
- Maoriland Film Festival – over 10,000 festival attendees

Source: Survey of Festivals

SHOWCASING CANADIAN INDIGENOUS PRODUCTIONS

76% of Indigenous festivals worldwide present Canadian productions.

Source: Survey of Festivals

IMAGINENATIVE FELLOWS AT THE 2018 EUROPEAN FILM MARKET IN BERLIN

- Kristy Assu, *Edge of the Knife* (Canada)
- Ciara Lacy, *Out of State* (USA)
- Mathis Staale Mathisen *My Father is a Danish Caveman, Surviving Sapmi* (Norway)
- Marc Fussing Rosbach, *Akornatsinniitut - Tarratta Nunaanni (Among Us - In the Land of Our Shadows)* (Greenland)
- Armando Bautista Garcia, *In Times of Rain* (Mexico) -
- Kerry Warkia, *Vai* (New Zealand)

Source: imagineNATIVE

3. POPULARITY OF INDIGENOUS SCREEN CONTENT WITH CANADIAN AUDIENCES

Canadians have a long-standing interest in Indigenous content on many platforms.

Indigenous programming aired by APTN appeals to both Indigenous and non-Indigenous audiences, reaching an estimated 1.9 million viewers each week, and 5 million viewers monthly.⁹ Overall, APTN has a total reach that is greater than the Indigenous population in Canada. This is also true for other Indigenous broadcasters, such as Maori TV in New Zealand and NITV (National Indigenous TV) in Australia.

INDIGENOUS BROADCASTERS REACH BEYOND INDIGENOUS COMMUNITIES

	Total Reach	Indigenous population
<i>APTN - Canada</i>	1.9 million weekly/ 5 million monthly	1.7 million
<i>Maori TV - New Zealand</i>	1.2 million	600K
<i>NITV - Australia</i>	2.2 million	670K

Sources: CMF, Maori TV and NITV

APTN plays a major role in supporting the growth and development of Canada's Indigenous screen production sector, as the main commissioner of Indigenous television production in Canada. The broadcaster has reportedly partnered or co-financed productions with 23 different broadcasters in recent years on a total of 39 productions. This level of co-financing speaks to the interest that other broadcasters have in airing Indigenous content.¹⁰

Programs produced by APTN, particularly where other broadcasters have been involved, have proven highly successful. The true crime series *Taken*, which aired on APTN and CBC reached a total of 2.3 million viewers in its debut season (2016-2017), including over half a million viewers in a single week. Focused on solving the mysteries behind Canada's missing and murdered Indigenous women, the popular series was renewed for a third season before the second season had even launched.¹¹

MOHAWK GIRLS, CANADA, 2010-2017

- 5 seasons
- Aired on APTN and Showcase
- Total Reach of 2.2 million viewers
- Sold to Australia, New Zealand and the US

Blackstone has been sold internationally, and has aired on Hulu and HuluPlus (US), on Maori TV (New Zealand) and SBS/NITV (Australia). It was also acquired by CBC for a second run on its television and digital service. Canadian viewers can also access the production on Netflix.

Sources: CMF, Maori TV and NITV

Mohawk Girls reached a total of 2.6 million viewers on APTN and OMNI1 in 2016, including up to 178,000 viewers during a single week. The critically acclaimed program ran for five seasons and in the current climate of interest in Indigenous content has potential to sell internationally.

APTN's signature programs are also popular with audiences. *Cashing In*, which ran for four seasons from 2009 to 2014 attracted almost 2 million viewers on APTN during its final season (2014-2015). In its final season in 2015-2016, Blackstone attracted 2.2 million viewers, with up to 172,000 viewers reached during one week. The hit drama has had a second life on the CBC and Netflix.¹² The new eight-part docu-drama *1491: The Untold Story of the Americas Before Columbus* (2017-2018) reached 1.6 million viewers in its first season (2017-2018).¹³ The program also has a following on its own subscription VOD channel on the Vimeo platform.¹⁴

Canada's top Indigenous programs have sold well internationally.¹⁵ Blackstone has had an international career, airing in the US, Australia and New Zealand.¹⁶ For its part, 1491: The Untold Story of the Americas Before Columbus was sold to Australia, Germany, Czechoslovakia and China. *Cashing In* has also done well selling around the world.¹⁸

In its most recent license renewal application, APTN describes its vision for a sister network in the United States (US) to reach a broader international audience.¹⁹ Such a development would represent a significant opportunity for the production sector.

TOTAL REACH OF MOST POPULAR INDIGENOUS PROGRAMS PRODUCED IN CANADA

Program	Total Reach (Total viewers)	Highest Weekly Reach	Broadcaster (s)	Year
<i>Taken</i>	2.316 M	547,000	APTN / CBC	2016-2017
<i>Mohawk Girls</i>	2.619 M	178,000	APTN / OMNI	2015-2016
<i>Blackstone</i>	2.211 M	172,000	APTN / Showcase	2015-2016
<i>Cashing In</i>	1.975 M	136,000	APTN	2014-2015
1491: The Untold Story of the Americas Before Columbus	1.608 M	134,000	APTN	2017-2018

Sources: CMF, Maori TV and NITV

The number of documentaries involving Indigenous people in key creative capacities that are airing on CBC is increasing. In the past three years (2015-2016 to 2017-2018), six Indigenous documentaries aired nationally on CBC Docs POV. These included films by Drew Hayden Taylor (*Searching for Winnetou*), by Lisa Jackson and Shane Belcourt (*Indictment: The Crimes of Shelly Chartier*), by Tasha Hubbard (*Birth of a Family*) and by Sonia Bonspille Boileau (*The Oka Legacy*). Also aired were *Colonization Road* by Michelle St. John and Alethea Arnaquq-Baril's award-winning *Angry Inuk*, which profiles the devastating effect misleading protests of Inuit seal hunting have on Inuit economies, communities, and their traditional way of life.²⁰

ANGRY INUK, CANADA, 2016

- Winner of 20 awards, including Audience Choice Award at Canada's Top Ten Film Festival (TIFF) and Audience Award, Hot Docs
- 336 screenings in Canada
- 101 international screenings
- Theatrical release in 14 Canadian cities
- Aired on CBC and APTN
- Participation at 72 festivals in Canada and abroad
- International sales to NHK (Japan), Big Rights (Spain, Chile, Colombia), CNX Studio (Taiwan), Billi Bili (China), Maori TV (New Zealand), Bond (USA), SBS (Australia), iTunes

In the three years since its launch, over one third (35%) of documentary shorts presented on CBC Short Docs have been by Indigenous creators.

In 2002, *Atanarjuat – The Fast Runner*, a film shot entirely in Inuktitut, was the top grossing Canadian film at Canadian and American cinemas, attracting \$4.9 million in ticket sales, and an estimated theatrical audience

of 380,000 Canadians.²¹ Awarded the Camera d'Or at Cannes, the film was an international success, earning another \$1.8 million in markets outside of North America. The popularity of Canadian indigenous screen content continues to grow.

ATANARJUAT - THE FAST RUNNER, CANADA (2002)

- Voted Best Canadian Film of All Time (2014)
- First feature film shot entirely in Inuktitut
- \$4,895,860 CAD North American (NA) box office
- \$1,806,371 CAD foreign (non NA) box office
- Camera D'Or, Cannes International Film Festival
- "A masterpiece" (New York Times)

Source: Case Study

AABIZIINGWASHI - WIDE AWAKE TOUR, 2017-2018

- 700 screenings of Indigenous content
- 190 communities across Canada hosted screenings
- 160,000 people attended the screenings
- Due to demand, the tour was extended to the United States, the United Kingdom and Finland

Source: NFB

160,000 Canadians and counting have watched Indigenous films during the NFB's cross-country *Aabiziingwashi Wide Awake Tour*. 1000 screenings have so far been held in 190 communities in every province and territory in Canada, with additional screenings in the United States, the United Kingdom and Finland.

Earlier this year, about 35,000 viewers visited the NFB's newly launched Indigenous Cinema online screening room, sixty percent of them Canadian.²² The online platform features an extensive library of over 200 short and feature-length films by Indigenous directors. These attracted over 100,000 views in the platform's first four months.

We note the continued popularity of Alanis Obomsawin's *Kanehsatake: 270 Years of Resistance*, one of the most viewed titles on nfb.ca. The film brought Indigenous stories to the mainstream, with a theatrical run and television screenings in Canada and around the world. Celebrating its 25th anniversary, the film continues to be screened in Canada and internationally.²³

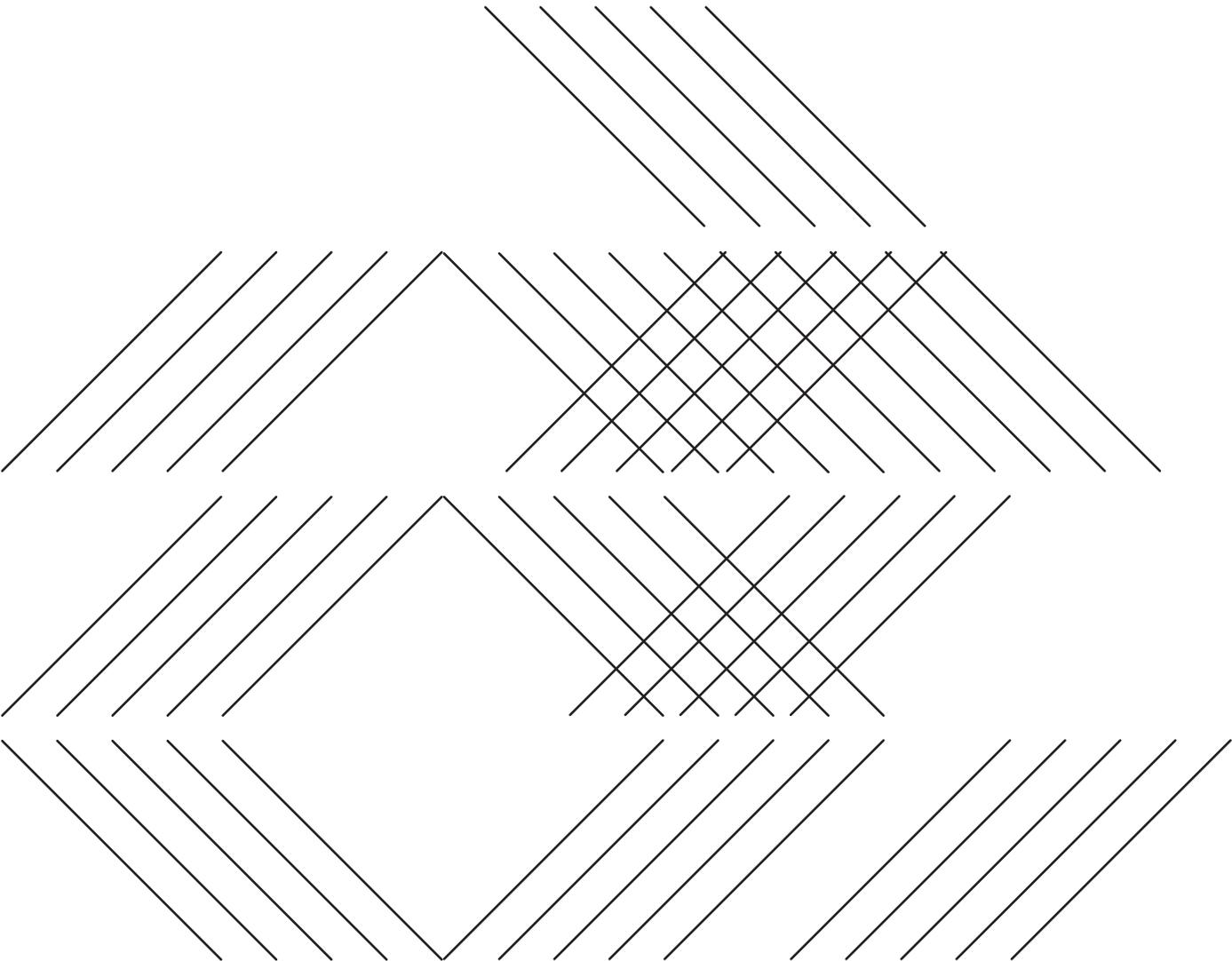
INDIGENOUS CINEMA SCREENING ROOM AT NFB.CA

- 35,000 visitors in the first four months
- 60% of viewers were Canadian
- The most popular titles were:
 - *Nunavut Animation Lab: Lumaajuuq* (Alethea Arnaquq-Baril)
 - *Kanehsatake: 270 Years of Resistance* (Alanis Obomsawin)
 - *We Were Children* (Tim Wolochatiuk, coproduced with Eagle Vision)

Source: NFB

-
- ¹ Marcia Nickerson, Supporting and Developing the Indigenous Screen-Based Industry in Canada. Canada Media Fund, 2016.
- ² Information provided by Telefilm Canada.
- ³ Source: Telefilm Canada. As noted in its 2016-2017 Annual Report, page 30, "Telefilm is transitioning from content-focused tracking, to talent-focused reporting with a particular emphasis on the roles of producer, director and writer."
- ⁴ Two projects were identified as Indigenous by the consultants: *Blood Quantum*, by Jeff Barnaby, and *One Day in the Life of Noah Piugattuk*, by Zacharias Kunuk, OC. Sources: Prospector Films website: <https://www.prospectorfilms.com/blog/2018/4/5/principal-photography-to-commence-on-jeff-barnabys-blood-quantum>; Jeremy Warren, "Reel Big Year," *Up Here Magazine*, September 27, 2018, retrieved from <https://uphere.ca/articles/reel-big-year>.
- Amounts of funding provided by Telefilm Canada.
- ⁵ Interview.
- ⁶ Tui Ruwhiu, Executive Director, Directors and Editors Guild of New Zealand, Blog Entry, May 4, 2018, retrieved from <https://www.degnz.co.nz/tag/nz-film-commission/>.
- ⁷ New Zealand Film Commission, 2018, Op. Cit.
- ⁸ NATIVE program curator Maryanne Redpath, quoted in Wendy Mitchell, "What's Driving the New Wave of Indigenous Filmmaking?" *Screen Daily*, 29 Mar. 2018, retrieved from www.screendaily.com/features/whats-driving-the-new-wave-of-indigenous-filmmaking/5127820.article.
- ⁹ Source: Canada Media Fund.
- ¹⁰ APTN, Op. Cit.
- ¹¹ Jordan Pinto, "Indigenous Voices Rising: Eagle Vision, Playback Online," September 19, 2017, retrieved from <http://playbackonline.ca/2017/09/19/indigenous-voices-on-the-rise-eagle-vision/#ixzz5Q5kc6QX8>.
- ¹² Greg David, "The Fifth and Final Season of APTN's Blackstone Premieres on Nov. 3." *TV, Eh?*, 5 Oct. 2015, re-trrieved from www.tv-eh.com/2015/10/05/the-fifth-and-final-season-of-aptns-blackstone-premieres-on-nov-3; "Is Blackstone (2011) On Netflix Canada?" *What's New on Netflix Canada*, retrieved from <https://whatsnewonnetflix.com/canada/m/blackstone-season-2>.
- ¹³ Source: Canada Media Fund.
- ¹⁴ IBID, retrieved from <http://1491tvseries.com/buy-dvd/>.
- ¹⁵ Source: CMF.
- ¹⁶ Greg David, "The Fifth and Final Season of APTN's Blackstone Premieres on Nov. 3." *TV, Eh?*, 5 Oct. 2015, re-trrieved from www.tv-eh.com/2015/10/05/the-fifth-and-final-season-of-aptns-blackstone-premieres-on-nov-3; "Is Blackstone (2011) On Netflix Canada?" *What's New on Netflix Canada*, retrieved from <https://whatsnewonnetflix.com/canada/m/blackstone-season-2>.
- ¹⁷ Program website, retrieved from <http://1491tvseries.com/page/>.
- ¹⁸ Source: CMF.
- ¹⁹ Martin Cash, "Aboriginal TV Network Seeks US Expansion," *Winnipeg Free Press*, November 19, 2016; APTN Application for License Renewal to the CRTC, Supplementary Brief, 2017.
- ²⁰ "How one documentary is changing people's minds about the Inuit seal hunt," CBC.ca website: <https://www.cbc.ca/cbcdocspov/features/how-one-documentary-is-changing-peoples-minds-about-the-inuit-seal-hunt>.
- ²¹ Based on estimated average movie ticket price of \$10.
- ²² Viewership data covers the period from the launch of the platform in March to July 24, 2018.
- ²³ Source: National Film Board

II. SUCCESS STORIES: CASE STUDIES OF CANADIAN AND INTERNATIONAL FILMS, TELEVISION PROGRAMS AND DIGITAL MEDIA



ATANARJUAT, THE FAST RUNNER, CANADA (2001)

- First feature film in the Inuktitut language
- \$4,895,860 CAD North American box office
- \$1,806,371 CAD foreign box office
- Camera D'Or, Cannes International Film Festival, 2001
- Grand Prix, Ghent International Film Festival, 2001
- Luminaria Award, Best Feature Film, Santa Fe International Film Festival, 2001
- Best Canadian Feature Film, Toronto International Film Festival, 2001
- Six Genie awards including Best Motion Picture and Best Director, 2001
- Voted Best Canadian Film of All Time (2014)
- "A masterpiece" (New York Times)

Few Canadian films have made such a profound impact on cinema as an Inuit production company's collaborative vision of an ancient Inuit legend, set some 2,000 years ago in the Nunavut Arctic and entirely, written, directed and acted in the Inuktitut language. Fourteen years after its release, *Atanarjuat, The Fast Runner* was voted the greatest Canadian film of all time by international filmmakers and critics at TIFF (2015).²⁴

The film was shot with a \$1.96 million budget that included the National Film Board of Canada as a coproducing partner, whose support introduced funding for an Inuktitut language feature for the first time, as well as Telefilm Canada, the Canadian Television Fund, the Canadian Film and Video Production Tax Credit, and a cohort of broadcasters and production companies, including the Aboriginal Peoples Television Network, Channel 24 Igloolik, and Igloolik Isuma Productions, Inc.²⁵

Premiering at the Cannes Film Festival in 2001, the film was awarded the prestigious Camera D'or, the only Canadian film to ever do so. *Atanarjuat* was Canada's top grossing film of 2002.²⁶ Its commercial release ran for an impressive 42-week release and unprecedented for an Indigenous film.²⁷ Earning almost \$7 million worldwide²⁸, it is one of the most successful Canadian films to date. The film earned a total of \$4,895,860 at the North American box office, and a further \$1,806,371 in other jurisdictions, including commercial releases in France and the U.S.

The film tells an old Inuit story, a cautionary tale of evil spirits, love, and betrayal set on the vast and beautiful tundra that encourages individuals to act in the greater good of the community. The story was told to the writers by eight Elders and then shaped into a 'master narrative' by the writing team, who consulted with the Elders on each new draft of the script, though in the end they chose to give the film a slightly more uplifting ending than the traditional bloodbath.²⁹

Following the film's triumphant success, Isuma Productions was awarded a 3-year funding envelope from Telefilm Canada that enabled the company to begin working on seven new scripts³⁰ and to continue to generate employment opportunities in the isolated Igloolik community.

Zacharias Kunuk (O.C.), Norman Cohn, Paul Apak, and Elder Pauloosie Qulitalik incorporated their production company, Igloolik Isuma Productions, Inc. in 1990, Canada's first entirely Inuit production company. Isuma's early videos focused on dramatic recreations of traditional Inuit life in the 1930s and 40s³¹, merging cultural preservation, education, and film, in a distinctly Inuit fashion. *Atanarjuat* was their first feature film, and the first feature film produced in an Indigenous language. As Inuk filmmaker Nyla Innuksuk says, "*Atanarjuat* reminds me that there is an alternative to allowing others to tell your truth. For that, I'm grateful."³² The film also demonstrates the appeal of *Atanarjuat's* distinct storytelling style with audiences around the world.

MOHAWK GIRLS (CANADA, 2010-2017)

- Aired for 5 seasons on APTN and OMNI1
- Total reach of 2.6 million viewers
- Nominated for 7 awards
- \$23.6 million CAD production expenditures in the province of Quebec

Mohawk Girls was the first TV comedy series ever set and filmed in the territory of Kahnawake, Quebec and follows “four young women figuring out how to be Mohawk in the 21st century.”³³

Created by Tracey Deer and Cynthia Knight and produced by Aboriginal-owned Rezolution Pictures, the show’s impressive list of writing credits includes Adam Garnet Jones (Fire Song), Catherine Bainbridge of Rezolution Pictures (RUMBLE: The Indians Who Rocked the World) and Canadian Screen Award-winning writer Shannon Masters (Empire of Dirt). The series was nominated for several Canadian Screen Awards over the course of its five seasons, including Best Comedy Series, Best Writing and Best Direction in a Comedy Program or Series.

The series was inspired by Deer’s 2005 award-winning documentary Mohawk Girls, produced by Rezolution Pictures and the National Film Board of Canada, which followed three teenage girls de

bating whether to stay on reserve or leave giving up their legal rights as Mohawks.³⁴ The film was awarded the Alanis Obomsawin Best Documentary Award at the imagineNATIVE Film + Media Arts Festival.

Broadcast on APTN and OMNI 1, Mohawk Girls reached a total of 2.6 million viewers on APTN and OMNI1 in 2016, including up to 178,000 viewers during a single week. The critically acclaimed program ran for five seasons and in the current climate of interest in Indigenous content has potential to sell internationally

In addition to its ground-breaking portrayal of Indigenous women, the production of Mohawk Girls had an important economic impact on the province of Quebec, with production expenditures over the course of its five seasons totalling approximately \$23.6 million, equivalent to the revenues and employment generated by 110,000 overnight visitors to Montreal. The production hired many local community members as cast and crew and rented numerous local facilities as filming locations, such as restaurants, community halls and private residences.³⁵

Mohawk Girls the series was produced with funding from the Canada Media Fund with the participation of the Bell Fund. The series’ talent and producers were featured at 2017’s MIPCOM showcase, “Indigenous Content Speaks to the World,” presented by the Canada Media Fund and Telefilm Canada.³⁶

BLACKSTONE (CANADA, 2010 - 2015)

- Aired on APTN and Showcase
- Renewed for 5 seasons (APTN)
- Total Reach of 2.2 million viewers
- Sold to Australia, New Zealand and the US
- 86 award nominations

Blackstone (Canada, 2010-2015), APTN’s signature prime time drama that aired for five seasons, demonstrates the power and broad appeal of Indigenous storytelling in a series format. Written and directed by Ron E. Scott, the idea for Blackstone was originally developed by the late documentary filmmaker Gil Cardinal, who wrote a number of the series’ episodes.³⁷ Set on a fictional reservation and featuring a largely Indigenous

cast, *Blackstone* presents an unflinching look at dramatized, contemporary Indigenous communities that has proven popular with audiences.

In its final season in 2015-2016, *Blackstone* attracted 2.2 million viewers, with up to 172,000 viewers reached during one week. All five seasons were acquired by CBC for a second run on its television and digital services. The show is also available on Netflix.³⁹

The series has also had wide international appeal, airing on Hulu and HuluPlus in the US, on New Zealand's Maori Television, and on Australia's SBS/NITV. Originally produced for APTN and Showcase, the show has been characterized as "Canada's Sopranos" and "a step in the evolution of TV."

Over the course of its career, *Blackstone* was nominated for multiple awards including Best Dramatic Series, and Best Dramatic Writing at the Canadian Screen Awards.⁴⁰

DIGITAL INNOVATION

From creating ground breaking digital platforms to advancing and challenging virtual reality, Indigenous filmmakers and organizations across Canada are at the forefront of digital innovation, productions and initiatives. The first Indigenous VR lab in Canada is about to be launched at Emily Carr University this year, as a three-year program overseen by filmmaker Loretta Todd (*Coyote's Crazy Smart Science Show*), that will aim to produce four VR projects a year and will also offer augmented reality (AR)/VR workshops.

Inuk filmmaker and producer Nyla Innuksuk is the founder and CEO of the VR production company Mixtape VR, that has produced projects for CBC Short Docs and A Tribe Called Red. She has also worked with Marvel Comics to develop their first Inuk superhero.

2167, four VR works by Danis Goulet, Kent Monkman, Scott Benesiinaabandan and the collective Postcommodity, imagines Indigenous futures 150 years from now. The production has been shown during the European Film Market in Berlin, programmed at international festivals and galleries, and has toured to Indigenous communities across Canada as part of imagineNATIVE's 2018 Film + Video Tour.

Montreal-based Minority Media famously developed the new genre of "empathy games" including the 2012 game *Papo & Yo*. Based on co-founder Vander Cabellero's experience growing up with an alcoholic father, the game follows a young South American boy named Quico who must prevent his friend, Monster, from eating frogs and becoming a killing machine. *Papo & Yo* won prestigious

awards including the Editor's Choice Award for PSN Stores (2012), the Herman Melville Award for Best Writing in a Game (New York Videogame Critics Circle Awards, 2012) and the Best Narrative and Audience Award at the Brazilian International Game Festival (2012). The game was launched on PS3 in 2013 and was a top seller upon its release and later became available on Steam along with its original soundtrack.

Launched in 2008, Isuma.TV is a multimedia online platform for Indigenous filmmakers and organizations that provides content in 80 languages, including Inuktitut, and currently has over 6000 videos. Anyone with an Internet connection can log on and access Isuma.TV's backend structure, and the platform actively seeks to implement resources in isolated Indigenous communities.

HUNT FOR THE WILDERPEOPLE, NEW ZEALAND (2016)

- Highest grossing domestic film of all time, New Zealand
- \$10,455,593 CAD domestic box office

- \$4,077,690 CAD foreign box office
- Best Comedy Film, Phoenix Critics Circle, 2016
- Audience Award, Edinburgh International Film Festival, 2016
- Audience Award, Sundance Film Festival 2016
- Narrative Feature Audience Award, Montclair Film Festival 2016

Upon its release in 2016, Taika Waititi's third feature, *Hunt for the Wilderpeople*, became the highest grossing domestic film of all time in New Zealand, knocking Waititi's previous feature, *Boy* (2010) from its position as top box office performer. The film tells the story of Ricky Baker (Julian Dennison), a Maori foster child, who, with his reluctant foster father (Sam Neill) attempts to escape the authorities via a madcap flight through the New Zealand wilderness.

Produced by Defender Films with Waititi's company Piki Films and post production house Curious Productions, the film had a budget of US \$2.5M, funded from the New Zealand Film Commission, NZ on Air, Indigenous production company Piki Films and Defender Films,

Distributed domestically by Madman Entertainment with Piki Films (co-led by director Taika Waititi and the film's producer, Carthew Neal), the film made \$1.2 million CAD in its first weekend, and its Saturday box office was the highest grossing single-day box office in New Zealand ever.⁴¹ With a 95 screen theatrical release in New Zealand, the film grossed \$10,455,593 CAD domestically and a further \$4,077,690 CAD in other territories and won numerous awards including the Sundance Film Festival and Edinburgh International Film Festival Audience Award, and was named Best Comedy Film of 2016 by the Phoenix Critics Circle.⁴²

Internationally, the film was sold to Vertigo Films (UK), Film1 (Netherlands), and Front Row Filmed Entertainment (Middle East, North Africa and Iran), as well to Sony Pictures Home Entertainment, The Orchard (US) and Signature Entertainment for the international home video market.⁴³

Adapted from the classic New Zealand novel *Wild Pork and Watercress* by Barry Crump, Waititi first began working on the project in 2005 and returned to the script after a 2013 meeting with the Crump family, bringing New Zealand production company Piki Films on board.⁴⁴

Waititi says of the film: 'We got to shoot in some places that no one else has ever filmed in before. I think it's probably the most fun I've had on a shoot [...]'⁴⁵ Shooting over a 5-week period in 2015, cast and crew filmed outdoors in locations including Piha, Horopito, and the Kaimanawa Plains,⁴⁶ capturing the country's astounding natural beauty on screen.

Unknown prior to *Hunt for the Wilderpeople*, Julian Dennison (Ricky Baker) was cast in the Hollywood blockbuster *Deadpool 2* (2017) after star Ryan Reynolds saw his performance.⁴⁷

BOY, NEW ZEALAND (2010)

- Second highest grossing New Zealand film of all time
- \$8,818,952 CAD domestic box office
- \$11,305,777 CAD foreign box office
- Best Feature Film, Generation K Plus, Berlin International Film Festival, 2010
- Best Feature Film, Sydney Film Festival, 2010
- Best Dramatic Feature, imagineNATIVE Film + Media Arts Festival, 2010

Distributed in New Zealand by Transmission Films, *Boy* is New Zealand's second-highest grossing film of all

time, having earned over \$8.8 million domestically and a further \$11.3 million worldwide. Charming audiences with a blend of humour and poignancy, *Boy* earned almost a million dollars in its first seven days⁴⁸, topping out with a domestic box office total of \$8,818,952 CAD and worldwide earnings of \$11,305,777 CAD.⁴⁹

"*Boy* was also a festival favourite screening at more than 50 international film festivals. NZFC's sales arm, NZ Film, negotiated sales of *Boy* to distributors in the US, Canada, Australia, Sweden, Iceland, Poland, Turkey, Israel and Spain."⁵⁰

Boy was numerous years in development. Under the working title *Choice* it was accepted into the Sundance Writer's Lab in 2005. Taika Waititi proceeded to make *Eagle vs. Shark* with Jemaine Clement and Loren Horlsey, and produced by Cliff Curtis and Ainsley Gardiner, and continued to develop *Boy* over the next three years, where the story evolved from dark to humorous.⁵¹

Set in 1984 in Waititi's home community of Waihou Bay, *Boy* tells the story of an eleven-year-old Maori child, known as *Boy*, who attempts to navigate a relationship with the absentee father he idolizes, who is fresh out of prison for robbery and has returned to his old stomping grounds. His fantasy father soon comes up against the reality of his comically awful, weed-growing, wannabe-gangster dad, Alamein (Taika Waititi).

Of the \$5.6 million NZD⁵² (\$4.8 million CAD) budget, about \$5 million NZD (\$4.3 million CAD) came from public sources, including major investments by the New Zealand Film Commission, as well as funding from New Zealand On Air and Maori TV.⁵³ The production also raised over \$100,000 CAD through crowdfunding to support its U.S. release⁵⁴. Produced by Ainsley Gardiner of Whenua Films with Unison Films (US), the film has a majority cast of Maori non-actors. The producer consulted throughout the production with tribal Elders to ensure Maori tradition was incorporated into all aspects of the shoot.⁵⁵ Gardiner also produced Waititi's Oscar® winning short, *Two Cars, One Night* (2004).

The film won numerous prestigious awards, including the Deutsches Kinderhilfswerk Grand Prix (Best Feature Film, Generation K Plus) at the Berlin International Film Festival.

Based on the strength of *Boy*, Waititi was hired to direct the Hollywood blockbuster *Thor: Ragnarok* (2017) and bring to it an "emotional resonance". As Kevin Feige, President of Marvel Studios, said: "*Boy* is hilariously audacious in its comedy, but it's also deeply moving and deeply emotional."⁵⁶

In 2017, following the success of *Thor: Ragnarok*, and seven years after its initial release in New Zealand, *Boy* had a limited theatrical release in the UK, followed by a digital and DVD release, with distributor Vertigo.⁵⁷ The film was also released on DVD and Blu-ray in 2011 by Paramount Home Media Distribution.⁵⁸

WHAT WE DO IN THE SHADOWS (NEW ZEALAND, 2014)

- \$2,639,116 CAD DOMESTIC BOX OFFICE
- \$5,619,790 CAD FOREIGN BOX OFFICE
- BEST FEATURE, SHEFFIELD HORROR FILM FESTIVAL
- PEOPLE'S CHOICE AWARD TIFF 2014
- ONE FILM SEQUEL, TWO TV SERIES SPIN-OFFS

Taika Waititi and Jemaine Clements' low-budget award-winning vampire mockumentary, *What We Do In The Shadows* (New Zealand, 2014) is the eighth highest earning film at the New Zealand box office, capturing a total of \$8.3 million CAD worldwide. Starring Waititi and Clements, *What We Do in the Shadows*, chronicles the modern day antics of a household of ancient vampires, mockumentary-style.⁵⁹

The film, which was loosely based on a 2005 short film by Waititi and Clements,⁶⁰ was shot with funding from the Defender Films (Taika Waititi), Unison Films (U.S.), Funny or Die (U.S.)⁶¹ and Resnick Interactive Development (U.S.), and from The New Zealand Film Commission, which came on board in post-production.⁶²

With a budget of NZD \$1.6 million (CAD \$1.4 million), *What We Do in the Shadows* earned CAD \$2,639,116 domestically⁶³ and CAD \$5,619,790 around the world. It screened at SXSW, Sundance, and the Berlin International Film Festival and won the People's Choice Award at TIFF 2014 and Best Feature Award at the Sheffield Horror Film Festival.

Distributed in New Zealand by Madman NZ Ltd, the US distribution rights were acquired by The Orchard, in partnership with Unison Films and Funny of Die. Orchard acquired the rights for the digital, broadcast and DVD market, while producer Unison handled theatrical distribution. Funny or Die promoted the film through social media and other initiatives.⁶⁴

The film has recently been spun off by Waititi and Clements into a 10-part, half-hour comedy series produced in association with the Scott Rudin company that is set to debut on the American broadcaster FX in Spring 2019. The two directors are also developing the film's sequel *We're Wolves*, which will focus on a pack of werewolves from the first film.⁶⁵ A second spin-off series called *Wellington Paranormal* has just launched on TVNZ2 in New Zealand.⁶⁶

ONCE WERE WARRIORS, (NEW ZEALAND, 1994)

- \$2,118,788 CAD foreign box office
- Voted Best New Zealand Film of All Time in 2014

The now classic *Once Were Warriors* (1994) by Lee Tamahori, is New Zealand's fourth-highest grossing film of all time. In the year of its release, the film beat out *Jurassic Park* (1993) to become the highest grossing film of the year and surpassed *The Piano* (1993) to become the highest-grossing film of all time, earning almost \$8million CAD – the first New Zealand film to earn more than \$6 million (NZD) at the domestic box office.⁶⁷

One in three New Zealanders are said to have seen the film.⁶⁸ Director Lee Tamahori remembers, "It was a genuine word-of-mouth phenomenon. It was the first film in New Zealand to have that sort of momentum. It was a New Zealand film that created such a buzz that people had to go and see it."⁶⁹

Showered with over sixty awards at festivals around the world, the film was voted the best New Zealand film of all time in a 2014 survey that included many representatives of the New Zealand industry and film critics.⁷⁰ It currently has a rating of 93% on Rotten Tomatoes⁷¹. Director Lee Tamahori went on to direct the commercial blockbuster thrillers *Along Came a Spider* (2001) and the James Bond franchise *Die Another Day* (2002).

THE SAPPHIRES, AUSTRALIA (2012)

- Highest grossing Australian film at the Australian box office in 2012
- \$13,500,188 CAD domestic box office
- \$4,852,882 CAD foreign box office
- Sold to every international territory and 5th highest level of post-financing sales of all time in Australia
- Best Narrative Feature Audience Award, Palm Springs International Film Festival, 2013
- Best Narrative Feature Audience Award, Portland International Film Festival, 2013

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- Australian Writer's Guild Major Award, 2012
 - Best Film, Australian Academy of Cinema and Television (AACTA) Awards, 2013

Often described as a “feel good film”, the Australian musical *The Sapphires* was a runaway hit in its year of release, earning almost \$27 million CAD. Written by Tony Briggs and directed by Wayne Blair, the film was the highest grossing film at the Australian box office of 2012, earning over \$19 million domestically and a further \$7.5 million worldwide.

The film had an estimated budget of between \$7.5 million CAD and \$9.4 million CAD,⁷⁵ and was financed with funding from Screen Australia, Screen NSW, and a loan from the country's Export Finance and Insurance Corporation.⁷⁶

Sales and distribution were handled by producer Goalpost Films with Quickfire Film and Hopscotch Films. Sales were also handled by Entertainment One and Hopscotch Films⁷⁷ (Australia), while Goalpost Film handled international sales.⁷⁸ The sale of *The Sapphires* to E1 Entertainment in the UK ranks amongst the top ten films to attract revenues in that market. The film was also sold in France, the Netherlands, Israel, Germany, Switzerland, India, Bangladesh, Bhutan, Nepal, Sri Lanka, New Zealand and Taiwan.⁸⁰

Prior to the film's Cannes premiere and based solely off the strength of a teaser trailer screened at the Berlin International Film Festival, the North American and international distribution rights (with limited exceptions, including airlines) were sold to the Weinstein Company⁸¹. Following its Cannes premiere, it received a 10-minute standing ovation⁸², and was later declared Best Film of 2013 by the Australian Academy of Cinema and Television and won the audience awards at two major US festivals.

Distributed in Australia by UK producer-distributor Hopscotch Films, the movie's atypical wide release counted an unheard of 270 Australian cinemas, and was the highest-earning Australian film on its opening weekend.⁸³ *The Sapphires* is one of only a few Australian domestic films to turn a profit, achieving the fifth-highest level of post-financing amongst the most successful films in Australia of all time.⁸⁴ Its certified double platinum soundtrack reached number one in Australia and number fifteen in New Zealand.⁸⁵

Set in 1969, the film tells the real-life inspired story of a four-woman band of Indigenous singers, played by four Aboriginal Australian actresses, who travelled from a reserve in the Australian Outback to Vietnam with their manager, played by Irish actor Chris O'Dowd, to entertain the troops. Writer Tony Briggs is the son of real-life Sapphire Laurel Robinson, and used his mother's stories as inspiration for both the original play (*The Sapphires*), which debuted at the Melbourne Theatre Company in 2004⁸⁶, and the feature film.

Dedication to authenticity, an Indigenous story from an Indigenous source, is what allowed the film to resonate so profoundly with audiences, both at home in Australia and abroad. Following the success of the stage play of the same name, writer Tony Briggs worked with experienced screenwriter Keith Thompson to craft the screenplay for the film. The

Sapphires was Wayne Blair's first feature film production as a director. Cinematographer Warwick Thornton is an accomplished director in his own right, winner of the Camera D'or for *Samson & Delilah* (2009) and more recently winning accolades for his critically acclaimed *Sweet Country* (2017).

It was important to Briggs to tell his mother's, and an Australian Aboriginal story, as authentically as possible. Shari Sebbens, who plays Sapphire Kay in the film, noted that: "It's the first time that Indigenous Australians [like us] - or one of the few times - have really been able to define our identity by ourselves."

Producer Rosemary Blight and Goalpost Pictures is currently producing the hit Indigenous superhero show, *Cleverman*, which premiered in June 2016 in Australia and the U.S. and finished its second season in 2017.

SWEET COUNTRY, AUSTRALIA (2017)

- 1,902,896 CAD domestic box office in first four months of release this year
- Special Jury Prize, Venice International Film Festival
- Platform Prize, TIFF
- Amongst the most highly lauded film in Screen Australia's history
- Sold to over 250 territories around the world
- Currently launching in 20 countries

In 2009 Warwick Thornton won the Caméra d'Or at Cannes for his first feature film, *Samson and Delilah* (2009), which grossed \$4 million domestically. Warwick Thornton's second feature, *Sweet Country* is arguably one of the most highly acclaimed Australian films. Amongst its many awards, the film won the prestigious Special Jury Prize at the Venice International Film Festival (2017) and the TIFF Platform Prize, which rewards cinematic risk-taking (2017).

Sweet Country was produced by Bunya Productions, founded by award-winning Aboriginal filmmaker Ivan Sen (*Mystery Road*, *Goldstone*) and producer David Jowsey (*Mystery Road*, *Goldstone*), with funding from the Adelaide International Film Festival, Screen Australia, Screen NSW, Screen Territory and the South Australian Film Corporation.

The film is distributed in Australia by Transmission Films and represented by international sales agent Memento Films. It has sold to over 250 territories and will soon be launching in 20 countries, with Samuel Goldwyn Films owning the North American distribution rights. Domestically, it earned \$ 2 million AUD (\$1.9 million CAD) in its first four months since being released earlier this year.

Sweet Country tells the story of an Aboriginal farmhand who goes on the run from the law after killing a white man in self-defence. The film uses its subject matter and stunning setting to draw on and subvert tropes of the classic Western, reimagining the genre

through an Indigenous perspective. The film's sweeping landscapes and visual beauty are the work of Thornton himself, who wrote, directed and shot the film. An accomplished cinematographer and winner of the Camera d'Or for his first feature, Thornton served as DOP for the hit musical *The Sapphires* (2014).

Thornton was born and raised in Alice Springs in the Northern Territories of Australia, where both his feature films were shot. After directing several successful shorts including *Nana* (2007) and *Green Bush* (2005) that both premiered at the Berlin International Film Festival, Thornton directed the first feature film from the Indigenous Department of Screen Australia, co-funded by a special initiative between the department and ABC, *Samson & Delilah* (2009). That film grossed a respectable \$4 million AUD (\$3.8 million CAD) in Australia.

BRAN NUE DAE, AUSTRALIA (2009)

- \$7,323,912 CAD domestic box office
- Seen by one quarter of all Australians
- Viewed by Australians 7.4 million times
- Most Popular Feature Film, Melbourne International Film Festival 2009
- Best Music Score, Film Critics Circle of Australia 2011
- Adapted from a successful 1990 stage musical of the same name

Bran Nue Dae (2009) is a feature film adaptation of the popular Indigenous Australian musical of the same name written by Jimmy Chi. Produced by Robyn Kershaw Productions and directed by Rachel Perkins, the film closed the Melbourne International Film Festival, where it was voted Most Popular Feature Film. It premiered internationally at TIFF, going on to become one of only two Australian features that screened at the Berlin International Film Festival in 2010.

The film was released in Australia by Roadshow Films, an affiliate of Village Roadshow Pictures, in December 2009. In 2010, *Bran Nue Dae* took second spot in the year's box office earnings, attracting \$3.7 million in its first two weeks and eventually breaking even on its \$7 million budget. Overall, the film eventually went on to become one of the Top 50 films of all time at the Australian box office, was seen by one quarter of the Australian population, and attracted 7.4 million views on all platforms. As the distributor notes, "the outstanding success of ... *Bran Nue Dae* confirmed the potential of locally produced films to perform in [the local Australian] market, particularly when the product has clear marketable elements.

Bran Nue Dae's upbeat soundtrack was also a hit, reaching number 29 on the Australian ARIA Albums Chart, while its colourful look is courtesy of Oscar-winning cinematographer Andrew Lesnie (*The Lord of the Rings*).

Set in 1969 in Broome, Australia, *Bran Nue Dae* is a road-movie musical that tells the story of Aboriginal teen Willie (Rocky McKenzie) who escapes an abusive boarding school and sets off for home, meeting a cast of oddball characters along the way, and attempting to win

back the love of his life, aspiring singer Rosie (Jessica Mauboy).

Directed by Rachel Perkins (Redfern Now, Mystery Road) and written by Perkins, Reg Cribb, and Jimmy Chi (Bran Nue Dae, the musical) the musical comedy/drama was financed in part by the Melbourne International Film Festival's Premiere Fund, one of five features to receive the inaugural funding, and by Screen Australia.

Represented by UK-based international sales agent Bankside Films, Bran Neu Dae is distributed in the US by Cinemart and Freestyle Releasing, and was sold to television in the Netherlands and Lebanon.

MYSTERY ROAD, (AUSTRALIA, 2018)

- First season on ABC
- 846,000 viewers per episode on ABC
- 246,000 online views per episode on ABC's iview platform
- Most watched non-children's series on ABC's online platform
- Second property spun off acclaimed film Mystery Road (2013)
- Sold to Acorn Media Enterprises

Mystery Road: The Series (Australia, 2018), currently airing on ABC, is a six-part crime drama spun off the critically acclaimed film Mystery Road (Australia, 2013) and its sequel Goldstone (Australia, 2016), both by Ivan Sen. On air, the show has attracted an average audience of 846,000 viewers. In addition to this sizable broadcast audience, the show ranks as the most watched non-children's series on the ABC's iview platform, averaging 246,000 viewers per episode.

The original feature drama, Mystery Road (2013), about an Indigenous detective (Aaron Pederson) investigating a crime in the outback, won the Australian Film Critics Association Awards for Best Film and Best Director, screened in the Special Presentation section at TIFF.

The series has been compared to True Detective and Fargo and, like Warwick Thornton's Sweet Country, draws on and subverts tropes of the classic Western while developing the notion of 'outback noir.'

The film spawned a sequel, *Goldstone* (2016), also starring Pederson investigating another crime, that was nominated for TIFF's 2016 Platform Prize. *Goldstone* premiered as the opening night film at the Sydney Film Festival and earned over \$750,000 CAD worldwide at the box office. Bunya Productions (*Sweet Country*) produced both films and *Mystery Road: The Series*, with funding support from Screenwest, Screen Australia, and the Western Australian Regional Film Fund supported by Royalties for Regions and Create NSW.

Mystery Road: The Series is distributed by All3Media and has screened at the 2018 Banff World Media Festival, France's 2018 Series Mania, the Munich Film Festival, and the Saint-Tropez Film Festival. Starring Aaron Pedersen and Judy Davis, the show has the

potential to appeal to international audiences and has been picked up for North American distribution online by the streaming service Acorn TV. Acorn Media Enterprises (the service's UK-based development division) is retaining secondary rights for the UK, Ireland, Australia, and New Zealand.

AME managing director Shane Murphy said of the series: "AME and Acorn TV are thrilled to partner again with our friends at All3media International on another high-quality international production. With its remote landscape, intriguing mystery and award-winning cast led by Aaron Pedersen and Judy Davis, *Mystery Road* is right in line with the first-rate international dramas we're bringing to our subscribers every month."

REDFERN NOW (AUSTRALIA, 2012 - 2015)

- Aired on ABC1
- Renewed for two seasons and spun off to a feature-length television movie
- Over 1 million viewers per episode in Season 1
- Sold to Vibrant TV Network and Netflix in the US and to France TV
- First drama series written, directed and produced by Indigenous Australians
- Two Logie Awards for Most Outstanding Drama
- AACTA Award for Best Drama Series
- Ranked among the top ten Australian cultural TV shows

Set in the inner Sydney suburb of Redfern, the smash hit *Redfern Now* (2012) was the first dramatic series ever to be written, directed, and produced by Indigenous Australians. Produced by Blackfella Films, in association with ABC TV, Screen Australia and Screen NSW, the development of the series was funded by a special initiative between Screen Australia's Indigenous Department and ABC. It was the first production of a new ABC Indigenous Department, with a new focus on drama and comedy and with an initiative budget of \$5 million AUD per year.

The series was produced on a budget of \$6.5 million AUD for six one-hour episodes. ABC provided a license fee, complemented by equity financing from Screen Australia. Funding in development was provided by Screen Australia's Indigenous Department. The development of the series provided opportunities for talented emerging Indigenous writers, who worked with seasoned, non-Indigenous story producer Jimmy McGovern.

The series aired on ABC1 in Australia for two seasons and on the Vibrant TV Network and Netflix in the US. The critically acclaimed true-to-life drama resonated with audiences. The show averaged 1.05 million viewers and was ranked amongst the top ten Australian cultural programs in its first season. 604,000 viewers tuned in to the Season 2 launch.

On the announcement of *Redfern Now's* renewal for a second season, Blackfella Films' producer Miranda Dear commented that, "Films like *Samson & Delilah*, *Bran Nu Day* and *The Sapphires* proved that there was a real hunger for Indigenous stories, and it was a

natural evolution for television to pick up that banner.” Redfern Now came to a rousing feature-length conclusion in the television film *Promise Me* (2015).

Distributed by the Australian Broadcasting Corporation, the series was sold to the Vibrant TV Network and Netflix in the USA and to France’s national public broadcaster, France TV. The two seasons were recently sold to France TV.

With episodes directed by Rachel Perkins (*Bran Nue Dae, Mystery Road*), Wayne Blair (*The Sapphires*) and Leah Purcell (*Cleverman*) the show is a tour-de-force of Indigenous Australian talent. *Redfern Now* won AACTA awards for both seasons, including Best Screenplay in Television (2013) and Best Television Drama Series (2014).

CLEVERMAN (AUSTRALIA, 2016 - 2018)

- Two seasons on ABC and Sundance TV
- 452,000 viewers for Australian launch
- 300,000 viewers per episode on ABC
- 69,000 viewers per episode on Sundance TV in the US
- Sold to BB3
- International coproduction between Australia, New Zealand and in partnership with the US
- 92% fresh rating from Rotten Tomatoes.
- Comic book based on the property sold out its initial run

Now in its second season on ABC in Australia and Sundance TV in the US, *Cleverman* is an international coproduction between Goalpost Pictures Australia and New Zealand’s Pekeko Films. This higher budget television series was produced with funding from Screen Australia, the New Zealand Film Commission and is distributed internationally by German distributor Red Arrow Studios International, and by Entertainment One Australia within the country.

Created by Ryan Griffen and Jon Bell, the critically acclaimed superhero/sci-fi drama series launched to 452,000 Australian viewers in its first season, and averaging 300,000 viewers per episode. In the US, the show averaged 69,000 viewers per episode on Sundance TV.

Produced for ABC in Australia, the series was eight years in the making, beginning with an internship for series creator Ryan Griffin with Goalpost Pictures funded by Screen Australia’s Indigenous Department following his participation in a producer mentoring program. Development funding was also provided by Screen Australia and “the process of gathering up stories from traditional communities took Griffen over five years, requiring delicate diplomacy and cultural sensitivity to protocols in communities across NSW, from his home town of Gunnedah to the Northern Rivers and the Northern Territory”. With Sundance TV on board as a partner and Red Arrow Studios International as international sales rep, the international Australia-New Zealand coproduction was approved by Screen Australia in 2014

It was the first Australian TV show ever to be invited to the Berlinale, where it screened in 2018 as part of the Berlinale Special Series showcase and in the industry-only *Drama Series Days* in the European Film Market. The series features special effects by the renowned Weta Workshop (*Lord of the Rings*) and won AACTA awards for Best Hair and Makeup in both 2016 and 2017.

This “landmark” show is said to have set the bar for diversity on screen in Australia. Set in the dystopian near-future the series features an Indigenous Cleverman who fights the deeply racist status quo. Its cast is 80% Indigenous, and its Aboriginal characters speak the real-life languages Gumbaynggir and Bundjalung. The show also provides internship opportunities for Indigenous interns.

Appealing to audiences in search of darker truths, the show is said to be “on par with the *Handmaid’s Tale*.”

The series has also been made into a comic book, the first issue of which sold out its initial run.

SAMI BLOOD (SWEDEN-NORWAY-DENMARK, 2016)

- \$2,729,715 CAD estimated domestic box office in Sweden
- Screened in 130 cinemas in Sweden
- 181,981 theatrical tickets sold
- Sold to 250 countries
- First film shot in the Southern Sami language, spoken by 500 people
- Dragon Award for Best Nordic Feature at Goteborg Film Festival
- Fedeora Award for Best Directorial Debut Film, Venice Film Festival
- Best Director Tokyo International Film Festival

The Nordic Region has an international hit in the debut feature film by Amanda Kernell. *Sami Blood* (2016) opened in 130 theatres in Sweden, achieving the third highest number of admissions in 2017, with 181,981 tickets sold, for an estimated domestic gross box office take equivalent to \$2.7 million CAD. Popular with international audiences too, *Sami Blood* has a 96% rating on the critical website Rotten Tomatoes. The film won one of the most lucrative international festival awards, the Dragon Award for Best Nordic Feature at Goteborg and has sold well internationally, turning a profit for investors. Remarkably, the film was shot in the Sami language, said to be spoken fluently by only 500 people across the north.

Produced as an international coproduction by Nordisk Film Production (Norway, Sweden and Denmark) and Bautafilm (Sweden) the film had a budget of \$3.5 million CAD and received support from the Swedish and Danish Film Institutes, Eurimages, and the International Sami Film Institute (ISFI), which supported the hiring of Sami technical positions for the production.. Non-Indigenous Nordisk Film Production is the majority producer and distributor of the film.

Sami Blood is the story of an elderly Sami woman who is confronted with the Indigenous identity she tried hard to forget when she returns to her hometown for a funeral. Through flashbacks to her time spent at a government boarding school in the 1930s, the racism and discrimination that she faced as a Sami comes to light.

The real-life sisters that appear in the film (Lene Cecilia Sparrok, Mai Erika Sparrok) are native South Sami speakers, one of the most threatened languages according to the United Nations with approximately 500 speakers. Lene Cecilia Sparrok won Best Actress at the Tokyo International Film Festival (2016) and the Seattle International Film Festival (2017) and *Sami Blood* has a 96% rating on Rotten Tomatoes.

Kernell's short, *Northern Great Mountain*, was a pilot for the feature made with funding from the Swedish Film Institute and the International Sami Film Institute, who also encouraged Kernell to tell a Sami story. The short won Best Short Film at the Goteborg Film Festival (2015), the Jury Award for Best Short Drama at imagineNATIVE (2015) and whose success enabled the feature to be made.

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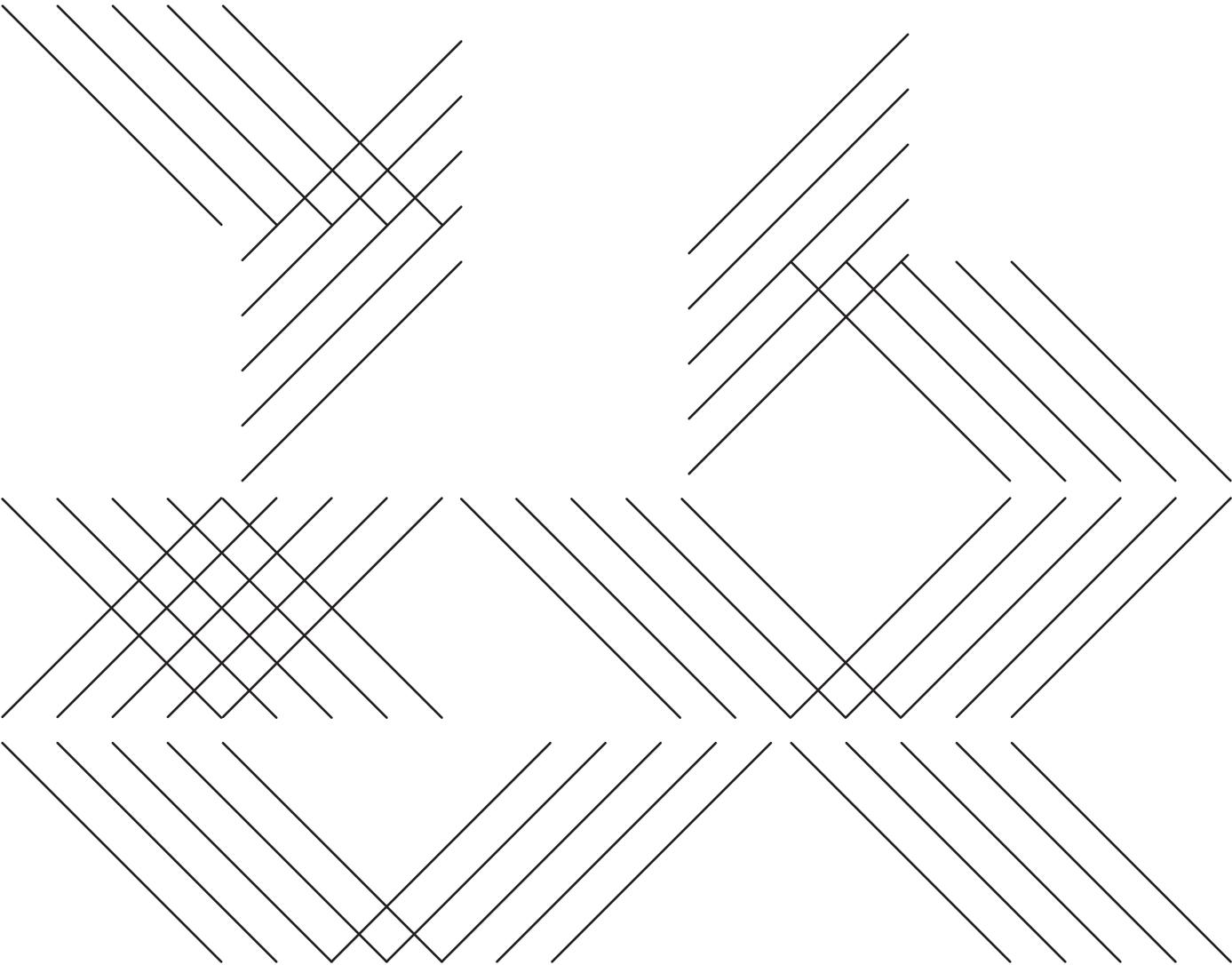
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III. LESSONS LEARNED FROM THE SUCCESS OF INTERNATIONAL
INDIGENOUS SCREEN CONTENT



PREAMBLE

In Canada, the Indigenous screen sector is poised to seize the international stage. The sector has a long history of successes, including the first feature film and box office hit to be produced in an Indigenous language (*Atanarjuat: The Fast Runner*), the world's largest Indigenous media festival (imagineNATIVE), and the world's first national Indigenous television broadcaster (APTN) and the successful productions it has commissioned.

Canada's national funding agencies have over the years developed innovative programs and strategies in support of Indigenous content production, including the National Film Board, the Canada Council for the Arts, the Canada Media Fund and Telefilm Canada. As mentioned in this report, Canada's national funders provide support for the development, production and promotion of Indigenous screen content. The Canada Media Fund and Telefilm Canada have featured Indigenous talent at major international markets such as Cannes. For its part, Telefilm has made an ongoing commitment to spotlight talent and production to audiences and international markets and buyers. The Canada Council for the Arts has supported imagineNATIVE's Indigenous Market Stand at the European Film Market, while the NFB's international online platform provides exposure to Indigenous productions the world over, while its international distribution arm is active in promoting Indigenous productions to buyers around the world.

While there is growing support in Canada for Indigenous production, there is a need to adopt a strategy that will help clarify a pathway to the international market with the view of aligning current efforts to leverage international opportunities for growth and sustainability. This section draws lessons from the success of international productions profiled in this report and identifies the success factors that could be applied in Canada.

1. Sustained Public Investment Has Built a Robust Industry

1.1 SUCCESS FOUNDED ON LONG-TERM INVESTMENT AND INDIGENOUS GOVERNANCE AND MANAGEMENT

A key factor in the success of Indigenous content is the highly sophisticated, and authentic storytelling evident in the work of talented Indigenous creators who are said to be at the peak of their careers, the result of decades of targeted public investment. Interviews with international stakeholders reveal that high quality content requires strategic, sustained investments in development and production to ensure a continuous cycle for growth.

The strategies implemented by Australia, New Zealand and the Nordic Region provide a whole sector approach and consistent levels of support to Indigenous production over the long term, which have over time helped to build a robust production sector. Common to all of these initiatives is the recognition of the importance to Indigenous creators to own and tell their own stories and to participate in the burgeoning creative economy.

Films and television programs emerging from Australia and New Zealand, where there have been repeated investments in the most talented artists, speak to increasingly wider audiences. In these countries Indigenous voices have been nurtured. Trailblazing filmmakers in Australia and New Zealand received early recognition and public funders committed to structured and sustained support. Through the decades these creators have become leaders, mentors and auteurs in the field of independent cinema and television production. This support is ongoing. The Indigenous Department of Screen Australia is celebrating its 25th anniversary, and continues to invest about \$3 million CAD in Indigenous productions each year, with additional funding available through the agency's other departments. The New Zealand Film Commission has just launched a new Maori Strategy, with a budget of \$4.5 NZD (\$3.9 million CAD).

Other international initiatives of the past decade, including the founding of the International Sami Film Institute in Norway, the development of the Native Program at the Sundance Institute, have further galvanized the Indigenous screen production sector. These initiatives achieve greater impact through partnerships. The Native Program of the Sundance Institute leverages the larger context of the Sundance Festival as well as other departments of the Institute to increase its impact. As discussed below, the International Sami Film Institute has announced a series of new initiatives with international partners, including the Canada Media Fund and Telefilm Canada, to support Indigenous production.

1.1.1 TWENTY-FIVE YEARS OF INVESTMENT IN THE INDIGENOUS DEPARTMENT OF SCREEN AUSTRALIA

The Indigenous Department of Screen Australia was launched in 1993 as the Aboriginal and Torres Strait Islander Programme. The department, which has over its history been directed by Indigenous professionals, controls its own budget, (currently \$3 million CAD) and initiatives and can support certain projects to gain access to the wider agency's resources. In its twenty-five year history the Department has supported over 160 Indigenous productions in all media.

Through successive initiatives Screen Australia has been instrumental in the advancement of the careers of talented Indigenous storytellers, allowing emerging filmmakers to gain experience on well-funded shorts created with professional casts and crews, and mentored by seasoned executive producers, and offering support to enable Indigenous writers and directors to gain experience on feature films and television dramas.

"Films like Samson & Delilah, Bran Neu Dae and The Sapphires proved that there was a real hunger for Indigenous stories, and it was a natural evolution for television to pick up that banner."

- Miranda Dear

Over the years, a number of highly seasoned Indigenous production companies have emerged, including Whenoa Films, Bunya Productions and Blackfella Films. The latter has operated for over twenty years, and has many production credits in both television and film. In its most recent round of funding, Screen Australia provided support to Indigenous companies, "to strengthen Indigenous business planning as well as assist slate development through the employment of key business personnel."

The success of the Indigenous Department is noted by current Head Penny Smallacombe: "Twenty-five years of work by our Indigenous Department has not only given Aboriginal and Torres Strait Islander peoples a voice, but has given our industry some of the most distinct and acclaimed storytellers in our history...Our faces are now routinely seen on television. Our languages are heard at the cinema. Our stories are now shared online with people around the world. Our work is celebrated at international festivals, treasured at home and has become a cultural and commercial resource for our people."

1.1.2 FIFTEEN YEARS OF TARGETED SUPPORT AND PARTNERSHIP WITH MAORI INDUSTRY BY THE NEW ZEALAND FILM COMMISSION

"Twenty-five years of work by our Indigenous Department has not only given Aboriginal and Torres Strait Islander peoples a voice, but has given our industry some of the most distinct and acclaimed storytellers in our history."

- Penny Smallacombe

Source: Screen Australia

Over the past decade and a half New Zealand has made successive strategic investments in Maori television production and feature film development. The Maori Television Service (MTS) was launched in March 2004, with a resultant “exponential growth in the Maori production and broadcast sector, together with successive strategies to support the growth of the Indigenous television sector.”

Boy

New Zealand (2010)

Second highest grossing New Zealand film of all time

\$8,818,952 CAD domestic box office

\$11,305,777 CAD foreign box office

Best Feature Film, Berlin International Film Festival

Best Dramatic Feature, imagineNATIVE Film + Media Arts Festival

Best Feature Film, Sydney Film Festival

Source: Case Study

The founding principles of the New Zealand Film Commission support Maori film. Through special initiatives and targeted support for well-funded and professionally produced shorts, and for feature film development, contributed to the development of talented Maori storytellers and the advancement of their careers.

In November 2007, the New Zealand Film Commission, working with the Maori screen industry and national association Nga Aho Whakaari, launched Te Paepae Ataata, an autonomous charitable trust providing “an alternative ‘pathway’ for developing Maori film scripts”, “The goal was to “identify and develop Māori writers for feature films that [would] eventually receive significant industry funding and be released to the public.” Fully 20% of the agency’s development funding was devolved to this independent Maori body.

ONCE WERE WARRIORS

NEW ZEALAND, (1994)

- *\$5,828,571 CAD domestic box office*
- *\$2,118,788 CAD foreign box office*
- *Voted Best New Zealand Film of All Time in 2014*

Source: Case Study

Through this Maori-governed initiative, senior Maori industry practitioners mentor and fund the development of Maori films (written, produced and directed by Maori), and recommend projects for production funding from the NZFC.

This year, the NZFC launched its new Maori Strategy (2018-2021), which commits new funding of \$3.9 million CAD for the production of Maori films and recognition through a new annual award for Maori Screen Excellence. Support provided by the NZFC, combined with successful development of the Maori television industry, has resulted in a “thriving Indigenous film sector with the capacity to successfully take on all stages of feature filmmaking.”

ARCTIC INDIGENOUS FILM FUND

International Fund to support, promote, and unify Indigenous filmmakers living in the Arctic regions of Canada, Alaska, Greenland, Russia, and Sapmi.

Five funding partners:

- The International Sami Film Institute (Norway)
- Canada Media Fund (Canada)
- Nunavut Film Development Corporation (Canada)
- Greenland Film Makers (Greenland)
- Archy (Russia)

AIFF will build a sustainable film industry in the Arctic, give a platform to Indigenous voices in isolated regions disproportionately affected by climate change.

Source: CMF Press Release.

1.1.3 TEN YEARS SINCE THE CREATION OF THE INTERNATIONAL SAMI FILM INSTITUTE BY THE SAMI PARLIAMENT IN NORWAY

The creation of the International Sami Film Institute by the Sami Parliament in Norway a decade ago has galvanized Sami film production, providing funding and professional development opportunities for Sami writers, directors and producers across the Nordic Region.

Said to represent a watershed in Sami film production, the Centre has been instrumental in the creation of targeted academic training programs, as well as professional mentorship and internship opportunities. The ISFI also encourages the development of emerging Sami talent by providing them with opportunities to work on well-funded short films. The ISFI also supported the early development and production of *Sami Blood*.

This past year, the ISFI was instrumental in the creation of the Arctic Indigenous Film Fund (AIFF), a collaboration between several international partners including the Nunavut Film Corporation and the Canada Media Fund.

1.2 THE IMPORTANCE OF INVESTMENTS IN DEVELOPMENT

Interviews with producers stressed the importance of a good script as a critical factor in the success of any project. The stories that succeed are uncompromisingly authentic and resonate with audiences emotionally. Stories are also “fresh” and appeal to people’s appetite for something new.

Many of the successful projects discussed above were lauded for the strength of their writing. *Redfern Now* won AACTA awards for both seasons, including Best Screenplay in Television (2013) and Best Television Drama Series (2014) for its powerful inner-city stories. Riwia Brown’s emotionally powerful script for *Once Were Warriors* won Best Screenplay at the 1994 New Zealand Film and TV Awards.

The writing room for *Redfern Now* provided opportunities for emerging Indigenous writers to gain experience working alongside more experienced writers, both Indigenous and non-Indigenous.

Source: Interviews.

The Indigenous Department at Screen Australia has supported the development of talent through targeted initiatives, many of which begin with a focus on development. In Australia, the television drama series *Redfern Now* was developed through a special initiative funded by Screen Australia to support the development of a television drama series intended for airing in prime time on ABC.

The New Zealand Film Commission provides another example of targeted and sustained support for development for Maori projects. As noted above, the Maori industry initiative Te Paepae Ataata was established in 2008 with funding from the NZFC. In 2014, the NZFC launched the He Ara Maori development fund which provides slate funding in the form of grants of \$50K NZD (approximately \$43K CAD) and up to \$100K NZD (approximately \$86K CAD).

In 2008 the Maori industry initiative Te Paepae Ataata was established with funding from the NZFC “to nurture and celebrate a Māori cinematic voice and to provide an alternative development pathway for Maori filmmakers.”

Source: New Zealand Film Commission

Similarly, the International Sami Film Institute has targeted script development and the development of talented writers. In 2011, the ISFI created the “Indigenous Film Fellowship” (IFF), which partnered emerging indigenous film talent with notable and distinguished filmmakers worldwide (the “Indigenous Film Circle”) in a two year program aimed at developing strong and compelling scripts and preparing solid marketing and financing plans before going into production.

1.3 FLEXIBLE FUNDING THAT ENCOURAGES MENTORING AND COLLABORATION

One of the characteristics of public funding in Australia and New Zealand has been flexibility to allow non-Indigenous professionals, such as producers and writers, to mentor talented Indigenous creators. Support for shorts in Australia and New Zealand allows emerging professionals to work with experienced professional executive producers, cast and crews. Over the years, the role of executive producer on short films funded in Australia and New Zealand was filled by both non-Indigenous and Indigenous professionals, allowing emerging filmmakers to learn from experienced mentors. Funding for television drama through Screen Australia supports projects with mixed teams of Indigenous and non-Indigenous writers. The agency is currently supporting Indigenous interns on the high value television series *Cleverman*.

2. WELL FINANCED INDIGENOUS STORIES, FEATURING INDIGENOUS ACTORS AND LANGUAGES ARE SUCCESSFUL

2.1 WELL-FUNDED PROJECTS WITH HIGHER BUDGETS HAVE A GREATER ABILITY TO SUCCEED

The musical comedies *Bran Neu Dae* and *The Sapphires* had budgets of about \$8 million AUD (\$7.5 million CAD) and \$10 million AUD (\$9.4 million CAD), respectively. In the New Zealand context, *Boy* had a “massive” budget of \$5.6 million (\$4.8 million CAD).

THE SAPPHIRES, AUSTRALIA (2012)

- Highest grossing Australian film at domestic box office in 2012
- \$13,500,188 CAD domestic box office
- \$4,852,882 CAD foreign box office
- Sold around the world - 5th highest level of sales of all time in Australia
- Audience Award Best Narrative Feature, Palm Springs International Film Festival
- Audience Award Best Narrative Feature, Portland International Film Festival
- Australian Writer’s Guild Major Award
- Best Film, Australian Academy of Cinema and Television (AACTA) Awards

Source: Case Study

Higher budgets allow the casting of well-known actors: Sam Neill in *Hunt for the Wilderpeople* and *Sweet Country*, Irish actor Chris O'Dowd in *The Sapphires*, Geoffrey Rush in *Bran Neu Dae*, Aaron Pedersen and Judy Davis in *Mystery Road: The Series*. Producers interviewed stressed the importance of casting some known actors in order to attract investment.

The higher budget television series *Cleverman* features special effects by the renowned Weta Workshop (*Lord of the Rings*). The series won AACTA awards for Best Hair and Makeup in both 2016 and 2017.

Redfern Now, Australia (2012)

- Two season run on ABC1
- 1.05 million viewers on average in Season 1
- Season 2 launched to 604,000 viewers
- Sold to Vibrant TV Network and Netflix
- First drama series written, directed and produced by Indigenous Australians
- Two Logie Awards for Most Outstanding Drama
- AACTA Award for Best Drama Series
- Season 1 ranked among the top ten Australian cultural TV shows
- Sold to France TV
- Logie Award for Most Outstanding Drama
- Supported the development of emerging writers

Source: Case Study

The first series of six one-hour episodes of *Redfern Now* had a budget of about \$1 million AUD (\$939K CAD) per episode, comparable to many non-Indigenous productions. With episodes directed by Rachel Perkins (*Bran Nue Dae*, *Mystery Road*), Wayne Blair (*The Sapphires*) and Leah Purcell (*Cleverman*) *Redfern Now* was a tour-de-force of Indigenous Australian talent and provided valuable opportunities to emerging writers to join the writers' room.

At over \$2 million NZD (\$1.7 million CAD), *Once Were Warriors* was well funded for a debut feature in 1994, allowing for a polished script and outstanding performances by rising stars Temuera Morrison, Rena Owen and Chris Curtis.

Films that have had success with audiences have also benefitted from significant marketing budgets based on the potential for wide appeal of the finished productions.

BRAN NUE DAE, AUSTRALIA (2009)

- \$7,280,640 CAD domestic box office
- Viewed 7.4 million times – seen by one quarter of the Australian population
- Most Popular Feature Film, Melbourne International Film Festival
- Best Music Score, Film Critics Circle of Australia
- Sound track album number 29 on the music charts in Australia

Source: Case Study

2.2 CASTING INDIGENOUS ACTORS AND USING INDIGENOUS LANGUAGES APPEALS TO AUDIENCES

Productions with primarily Indigenous casts have earned significant revenues, indicating that sizeable audiences are interested in seeing Indigenous people on screen. *Bran Neu Dae* earned almost \$8 million AUD (A\$7.5 million CAD) in domestic box office sales. The television drama series *Cleverman*, which features an

80% Indigenous cast, has earned over \$1 million AUD (\$939K CAD) in gross revenues. *Boy* features an all Maori cast and earned a total of \$20 million CAD domestically and around the world. *Two Cars, One Night* (New Zealand, 2003) was said to have afforded Maori children the first ever opportunity to see themselves on screen as they are in life. *Sweet Country* features Indigenous actors in leading roles.

A number of productions feature Indigenous languages, which are clearly not a barrier to audience popularity. *Cleverman's* Aboriginal characters speaking the real-life languages Gumbaynggir and Bundjalung. *Sami Blood* was shot in South Sami, spoken fluently by about 500 people. Director Amanda Kernell states she "saw the power in telling a very specific story in a very small language. You can be so specific and it's so universal."

2.3 WELL-FUNDED SHORTS BUILD SKILLS AND ADVANCE THE CAREERS OF TALENTED CREATORS. Screen Australia, the New Zealand Film Commission and the ISFI provide support significant funding for short films, and these have made their mark.

Support for well-funded shorts in both Australia and New Zealand, within a context of sustained professional development, has had a profound impact on the development of film and television in these jurisdictions. According to interviewees, Australia has historically provided between \$80K (\$58 CAD) and \$160K (\$116K CAD), and in some cases up to \$200K (\$145K CAD) to produce short films, recognizing their important role in developing talented producers and directors. These investments are styled as competitive programs, which lead to the production of a small number of excellent productions each year.

Investments in Maori short films were referred to as foundational for their role in building the capacity of the Maori industry in New Zealand. With funding of about \$100K from the New Zealand Film Commission, Taika Waititi's short film, *Two Cars, One Night* (2004) was nominated for the Oscar® for best short film at the 2004 Academy Awards, effectively launching his international career. The director went on to participate in the Sundance Institute's Writers' and Directors' Labs, which supported two of his features, the lower budget *Eagle vs Shark* that played well in Australia, and the highly successful *Boy*.

Kernell's short, *Northern Great Mountain*, established Kernell as a major storyteller. Produced with assistance from the ISFI, the film won numerous awards, including Best Short Film at the Goteborg Film Festival (2015), the Jury Award for Best Short Drama at the imagineNATIVE Film + Media Arts Festival (2015). The film's success and facilitated the financing of *Sami Blood*, whose story is intertwined with that of *Northern Great Mountain*.

A recent trend is the packaging of short films together into longer-length works.

In 2015, the ISFI launched the Arctic Film Circle, in partnership with the Nunavut Film Corporation, to create a bridge between Arctic filmmakers. The partnership supported the production of *The Last Walk*. Funded by the International Sámi Film Institute, with partners that include the Nunavut Film Development Corporation, *The Last Walk* is a series of three short films created by Indigenous filmmakers from different Arctic regions, each telling their own interpretation of a story of two sisters dealing with tragedy. While sharing a common thread, each film stands apart and speaks to the immense talent that lays north.

Waru, New Zealand, 2017

In New Zealand, eight women Maori directors worked together to create Waru (2017), which tells the story of a young boy killed by his caregivers in eight parts, each section by a different director but all creating one cohesive narrative. Waru won the Screenwriters Guild of New Zealand award for Best Screenplay and has screened at the Seattle International Film Festival.

Source: New Zealand International Film Festival website

The New Zealand Film Commission financed the multi-short film *Waru* (2017), which opened the imagineNATIVE Film + Media Arts Festival 2017 and won the Screenwriters Guild of New Zealand award for Best Screenplay.

Directing Labs also support emerging filmmakers to make short films. The Sundance Institute is one of the better known initiatives, but there are others, such as the directing lab at the Melbourne International Film Festival, which supported the development of filmmaker Taika Waititi.

DIRECTING LABS

The Sundance Institute's Native American and Indigenous Film Program facilitates the participation of Native filmmakers in the Sundance Film Festival through initiatives like the Native Filmmakers Lab, an opportunity for Native filmmakers to develop a short film with grants from the Lab and under the guidance and mentorship of a supervising Producer and Director. Alumni of the lab include Taika Waititi, Ciara Lacy, and Sterlin Harjo.

The Melbourne International Film Festival Accelerator Lab is an emerging director program that helps promising short filmmakers make the transition to feature films. The Lab is a four-day program of talks, workshops, seminars with Industry leaders and screenings. Past Indigenous alumni include Taika Waititi.

3. FRESH TAKES ON ESTABLISHED GENRES APPEAL TO GENERAL AUDIENCES

3.1 THE MOST SUCCESSFUL FILMS AND TELEVISION SHOWS OF RECENT YEARS HAVE BEEN FRESH TAKES ON ESTABLISHED GENRES THAT APPEAL TO GENERAL AUDIENCES

Boy and Hunt for the Wilderpeople are comedies with broad appeal. With fully developed, authentic characters, these films resonate on an emotional level with their audiences. Kevin Feige, President of Marvel Studios, was quoted as saying that, "Boy is hilariously audacious in its comedy, but it's also deeply moving and deeply emotional." The film was named Best Comedy Film of 2016 by the Phoenix Critics Circle.

The mockumentary *What We Do in The Shadows* is a hilarious send-up of vampires and the horror genre.

As its name implies, *Mystery Road* is a mystery series. The series has been compared to *True Detective* and *Fargo*, in a style that is being referred to as "outback noir". Also set in the Australian outback, Warwick Thornton's *Sweet Country* has been praised for its revisionist revival of the western genre.

WHAT WE DO IN THE SHADOWS

NEW ZEALAND, (2014)

- \$2,639,116 CAD domestic box office +
- \$5,619,790 CAD foreign box office
- People's Choice Award, TIFF
- Best Feature, Sheffield Horror Film Festival

Source: Case Study

As its name implies, *Mystery Road* is a mystery series. The series has been compared to *True Detective* and *Fargo*, in a style that is being referred to as "outback noir". Also set in the Australian outback, Warwick Thornton's *Sweet Country* has been praised for its revisionist revival of the western genre.

CLEVERMAN, AUSTRALIA (2016, 2018)

- The international coproduction Cleverman (Australia, New Zealand and the US) is a dark sci-fi series that has been favourably compared to The Handmaid's Tale.

Source: The Verge

Cleverman is a superhero sci-fi series with a twist that appeals to audiences in search of darker truths. The show has been called one of the bleakest television shows out there, "on par with the Handmaid's Tale.

MYSTERY ROAD: THE SERIES, AUSTRALIA (2018)

- Airing on ABC
- 846,000 viewers on average on ABC
- 246,000 viewers on average online on ABC's iview
- Second property to spun off Mystery Road (2013), feature film by acclaimed director, Ivan Sen
- Acquired by Acorn TV for US streaming

Source: The Verge

The Sapphires and Bran Neu Dae are feel-good family-friendly musicals. Both films are based on pre-existing properties. The Sapphires is based on the hit play by the same writer, Tony Briggs, which debuted at the Melbourne Theatre Company in 2004. This film had the fifth-highest level of sales of all time amongst Australian. Bran Neu Dae is based on Jimi Chi's musical for the stage of the same name. Chi also worked on the screenplay for the film version of his show.

A number of other films that are doing very well are based on successful novels. Hunt for the Wilderpeople was adapted from the classic 1986 novel, Wild Pork and Watercress by Barry Crum. Once Were Warriors is based on the 1990 controversial and best-selling novel of alcoholism and domestic violence in a Maori family, based partially on the real life experiences of author Alan Duff.

4. PRESTIGIOUS AWARDS HELP DRIVE SUCCESS

4.1 CRITICAL RECOGNITION, PRIZES AND AWARDS BOOST MARKETING EFFORTS, TRANSLATING TO SALES AND ADVANCING THE CAREERS OF TALENTED CREATORS

Festivals and awards play a significant role in promoting Indigenous content and driving its popularity with audiences. The prizes and awards conferred on the best productions each year help build audience interest and drive box office sales. This is the case with many of the successful films and television programs examined here.

The films examined here have won some of the most prestigious awards. Sweet Country won the Special Jury Prize at the Venice International Film Festival and Best Feature and the Asia Pacific Screen Awards in 2017. Hunt for the Wilderpeople was lauded with Audience awards at Sundance Film Festival and Edinburgh International Film Festival Audience Award.¹⁹⁶ Boy won major awards at the Berlin International Film Festival and the AFI Fest in LA.

As Indigenous producers venture into higher budget television drama, their efforts are also being recognized internationally. *Cleverman* was the first Australian TV show ever to be invited to the Berlinale.¹⁹⁷

SWEET COUNTRY, AUSTRALIA (2017)

- \$1,902,896 CAD domestic box office in first four months of release this year
- Special Jury Prize, Venice International Film Festival
- Platform Prize, TIFF
- Most highly lauded film in Screen Australia's history
- Sold to over 250 territories around the world
- Currently launching in 20 countries.

Source: Case Study

5. BUILDING AND LEVERAGING RELATIONSHIPS LEADS TO DISTRIBUTION SUCCESS

5.1 SUCCESSFUL PRODUCERS HAVE DEVELOPED BUSINESS RELATIONSHIPS WITH DISTRIBUTORS AND SALES AGENTS

The successful productions examined in this report are being distributed by domestic distributors and international sales agents. They range from small, boutique distributors to major international players. The most successful Indigenous feature films in Australia and New Zealand both benefitted from wide theatrical releases: 95 screens in New Zealand for *Hunt for the Wilderpeople*, distributed domestically by Madman Entertainment, and 270 screens in Australia for *The Sapphires* (E1 and Hopscotch Films).

Our interviews reveal that successful producers have developed their relationships with distributors and sales agents over many years. Among the distributors and sales agents attached to the projects, we note major players such as Red Arrow International (*Cleverman*), All3Media (*Mystery Road*), the now defunct Weinstein Company (*The Sapphires*), Memento Films (*Sweet Country*) and Bankside Films (*Bran Neu Dae*). Other distributors include Hopscotch Films (*The Sapphires*) and Orchard (*What We Do in the Shadows*).

Indigenous broadcasters in Canada, the US, Australia and New Zealand are commissioning and distributing Indigenous content, including documentaries, drama and animation. Non-Indigenous broadcasters bring their considerable reach to drive the success of productions with audiences. The national broadcaster ABC has played an important role in distributing Indigenous dramatic series in prime time, including *Redfern Now* and *Cleverman*. Interviews with American funders note the importance of the Public Broadcasting Corporation (PBS) in the US in providing resources for Indigenous productions, many of which are broadcast on its service. We also note the role being played by the New Zealand Film Commission (NZFC) in New Zealand, in the domestic and international distribution of film. The table below provides an overview of the many relationships built by producers of successful films and television programs, with domestic and international distributors, including sales agents, broadcasters and funders.

DOMESTIC AND INTERNATIONAL DISTRIBUTORS OF SELECTED INTERNATIONAL PRODUCTIONS INCLUDED IN CASE STUDIES

TITLE	PRODUCER	DOMESTIC DISTRIBUTOR	INTERNATIONAL DISTRIBUTORS
HUNT FOR THE WILDERPEOPLE	Defender Films, Piki Films	Madman Entertainment, Piki Films	Vertigo Films (UK) Film 1 (Netherlands) Front Row Entertainment (Middle East and Africa)
BOY	Whenua Films	Transmission Film	NZ Film (NZFC sales)
WHAT WE DO IN THE SHADOWS	Defender Films	Madman NZ Ltd	Orchard (US) Unison Films (US)
THE SAPPHIRES	Goalpost Pictures	Goalpost Pictures, Quickfire, E1, Hopscotch Films	Hopscotch Films (international) Weinstein Company (Assets acquired by Lantern Entertainment) (US) Goalpost pictures
SWEET COUNTRY	Bunya Productions	Transmission Films	Memento Films (international sales agent)
BRAN NEU DAE	Robyn Kershaw Productions	Roadshow Films	Bankside Films (UK) Cinemart (US) Freestyle Releasing (US)
MYSTERY ROAD	Bunya Productions	ABC Australia	All3Media International Acorn Media (UK and online)
REDFERN NOW	Blackfella Films	ABC Australia	ABC Australia
CLEVERMAN	Goalpost Pictures (Australia), Pekeko Films (New Zealand)	ABC Australia	Red Arrow Studios International
SAMI BLOOD	Nordisk Film Production (Norway, Sweden and Denmark), Bautafilm (Sweden)	Nordisk Film	Nordisk Film

Source: Case studies.

5.2 RELATIONSHIPS ARE KEY TO INTERNATIONAL COPRODUCTION AND ACCESS TO FOREIGN MARKETS

International coproduction facilitates access to markets. Two of the productions examined for this report are international coproductions. The television series *Cleverman* is an international coproduction between Australia and New Zealand. *Sami Blood* is a coproduction between Norway, Sweden and Denmark. Coproduction requires business relationships to harness funding, experience and increase capacity. The producers of these projects had partnerships with experienced and in some cases, non-Indigenous producers. Indeed, about half of the successful Indigenous productions examined had the involvement of experienced, non-Indigenous producers, facilitating their access to the market.

6. SUMMARY OBSERVATIONS

Indigenous screen-based stories have proven their popularity with audiences around the world. This speaks to the success of sustained support for the Indigenous screen-based sector in securing its place in its respective domestic markets. At festivals, in theatres, on television and streaming services, audiences are choosing to watch Indigenous content.

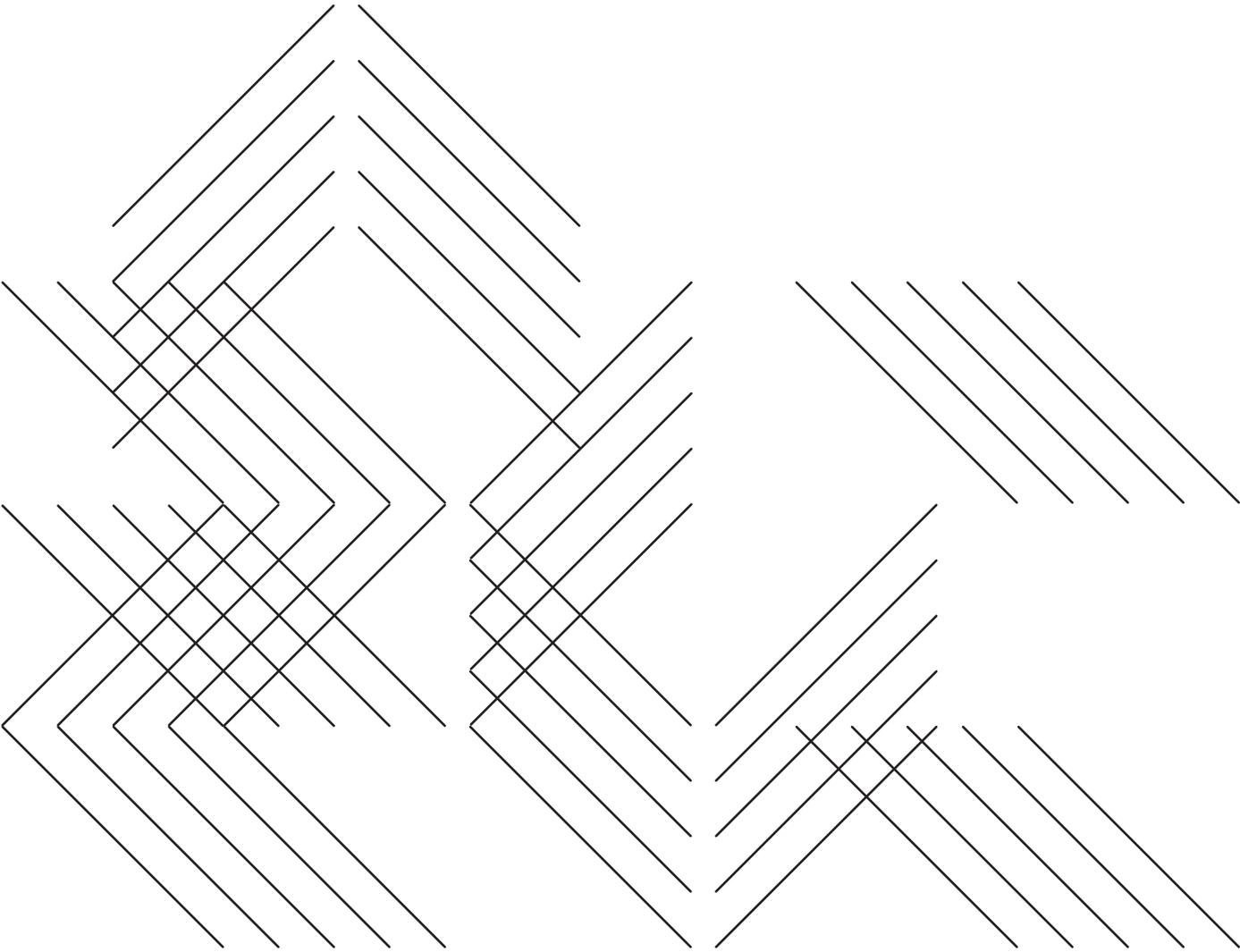
In jurisdictions with the greatest success, Indigenous people are involved in decision-making at the highest levels, funding is significant and sustained over decades, and the most talented creators are supported through structured opportunities to gain experience, develop their skills, gain international exposure and to work and learn from the best in the industry.

The lessons afforded by the most successful productions worldwide point to a range of success factors:

- Sustained, long-term public investments governed and managed by Indigenous people, including significant investments in film and television development to create compelling stories that can move forward to production; and flexible funding to encourage mentoring and collaboration and create opportunities to build relationships with more experienced Indigenous and non-Indigenous producers.
- Well financed productions with higher budgets and higher-budget short formats, casting Indigenous actors and integrating Indigenous languages.
- Embracing popular genres like comedy, musicals, horror and science fiction as well as adaptations.
- Winning prestigious awards to build awareness and support marketing.
- Building and leveraging relationships with distributors, sales agents and with producers in foreign jurisdictions to facilitate distribution, sales and international coproduction.

It is interesting to note that jurisdictions where Indigenous films and television programs have had particular success with audiences, the Indigenous populations are much smaller than in Canada, and yet have enjoyed more significant commercial successes of their Indigenous productions. Indigenous people in Canada account for almost 5% of the total population (1.7 million). By comparison, Aboriginal and Torres Strait Islanders make up 3% of the Australian population (670K people). In New Zealand, Maori account for 15% of the population (600K people). We also note that in Sweden, where the first feature film in the Sami language recently had a box office success, Sami people account for about 0.4% of the population (estimated to be between 20K and 40K people).

IV. PATHWAYS TO THE INTERNATIONAL MARKET FOR
CONSIDERATION BY THE INDIGENOUS SCREEN SECTOR IN CANADA



In light of the significant opportunities afforded internationally, and significant interest in Canada to strengthen and promote Indigenous screen production, it is timely to consider the lessons learned from the international Indigenous screen sector in order to leverage the already considerable efforts by the Indigenous screen sector and its stakeholders to achieve greater success.

This section presents the elements of a strategy - potential pathways - for the continued growth and international success of Indigenous screen content for consideration by the Indigenous screen sector and its stakeholders in Canada.

The strategy has the following four goals:

1. Develop Content That Appeals to International Audiences
2. Produce Content That Appeals to International Audiences
3. Build Relationships with Distributors and Sales Agents
4. Increase Exports and Sales in Foreign Markets

For each of these goals, pathways to success have been developed and are discussed below.
Indigenous Leadership At the Highest Levels

To succeed, this strategy assumes Indigenous leadership at the highest levels, including leadership provided by Indigenous screen organizations and Indigenous decision-makers in non-Indigenous organizations. It is clear from this study that Indigenous people are best positioned to determine how public resources for Indigenous productions should be allocated. In the jurisdictions examined, Indigenous people have led the development of funding for Indigenous content creation. Indigenous organizations and decision-makers have led the development of critical support initiatives, identified and nurtured talent, fostered mentoring, collaboration and the building of critical business relationships and supported the professional development of producers, directors and writers through the development, production, promotion and exhibition of shorts, features and series and all budget levels. Indigenous production companies are responsible for the creation of some of the most successful Indigenous content internationally. For their part, Indigenous festivals have been key to raising awareness of Indigenous content with audiences, and to supporting networking and relationship building.

The figure below illustrates the key goals of this strategy and their relationship to Indigenous Leadership. As can be seen from the figure, the strategy provides actions to be undertaken by the Indigenous screen sector, and others to be undertaken in partnership with the sector's industry and public sector partners.

1. DEVELOP CONTENT THAT APPEALS TO INTERNATIONAL AUDIENCES

WORK WITH PARTNERS TO:

- Ensure Sustained Support Through All Phases of Development for Content with International Appeal
- Remove Barriers to Development
- Increase Development for Prime Time Television
- Leverage Opportunities for Indigenous Writers to Hone Their Scripts and Craft

1.1 ENSURE SUSTAINED SUPPORT THROUGH ALL PHASES OF DEVELOPMENT FOR CONTENT WITH INTERNATIONAL APPEAL

To be competitive internationally, Indigenous producers need opportunities to access support for the development of a diversity of formats, genres and budget levels, as well as the optioning of Indigenous content. They need opportunities to fund the most promising projects from idea to final draft.

This study shows that there is significant interest in a diverse range of Indigenous content in a variety of formats, including documentaries, animation and drama in short and long-form; in a range of genres, including musicals, horror, comedy, science fiction and literary adaptations; integrating Indigenous actors and languages, and at different budget levels, from \$200K for shorts to \$12 million for features. There is interest from audiences in both original intellectual property and adaptations of pre-existing properties.

Indigenous screen content producers are small companies for the most part, with limited capacity to invest in development. Development includes the evolution of a project from idea to screen and, ultimately, international markets. It is at the development stage that most fundamentally distinguishes a good film, television drama or digital property, from a bad one. Interviews conducted for this study stress the importance of a good story and great script to the success of Indigenous content. Producers interviewed noted that success begins with a well-crafted engaging story. For this reason, development is a costly, high-risk undertaking, requiring multiple development investments, as only the best scripts will go forward into production.

Indigenous producers interviewed for this report are interested in undertaking more development with a view to producing for the international market. They are largely frustrated by a lack of access to public funding, which would trigger other investments and provide them with opportunities to develop essential business skills and relationships. Indigenous writers have noted that, “there are few supports for filmmakers to move from treatment to outline to first and then second draft.”¹⁹⁹

Indigenous producers and writers need opportunities to work and learn from the best in Canada and the world, either through co-development, mentorships, apprenticeships, partnerships or other forms of collaboration.

The experience of Australia and New Zealand has shown that Indigenous content development needs to be well-funded, involving Indigenous decision-makers at high levels, and including structured support through special initiatives, to allow projects to move smoothly and in a timely manner from idea to treatment to draft and polish. Funding in Australia and New Zealand is being provided through special initiatives that provide professional development opportunities for producers, access to mentors, and structured support through multiple drafts of a screenplay with a view to create screen content that can resonate with audiences domestically and internationally.

1.2 REMOVE BARRIERS TO FEATURE FILM DEVELOPMENT

It is important for existing funding agencies and organizations to ensure that their respective programs do not inadvertently create barriers to development activity. It was pointed out that Indigenous companies in Canada often have no choice but to partner with production companies that have theatrically released a feature film within the last five years in order to access feature film funding. This puts Indigenous companies at a disadvantage by obliging them to dilute their ownership of their properties, often to non-Indigenous companies, thus maintaining the legacy of colonial power structures. Interviews with Canadian producers also revealed that options are expensive to acquire and often Indigenous producers, whose companies are very small, lose out on options of Indigenous stories to larger, non-Indigenous buyers of rights.

We note that Screen Australia offers Indigenous production companies grants, which are easier to administer, in the range of \$50,000 AUD (\$46,700 CAD) to \$100,000 AUD (\$93,382 CAD) for the development of their feature film slates. Producers can also apply for additional resources.

1.3 INCREASE DEVELOPMENT FOR PRIME TIME TELEVISION

Indigenous producers and writers require access to opportunities to develop television pilots and series for primetime.

A number of studies, including this one, have found that Indigenous producers continue to experience significant difficulty in attracting investment from Canadian broadcasters, with the exception of APTN. The CBC has made inroads, particularly in documentary, but that much more could be done, in particular to support drama. Studies commissioned by the CRTC have found that “on English-language television Aboriginal Peoples were “severely underrepresented” and that on French-language television Aboriginal Peoples were “non-existent”.”²⁰¹

In Australia, the development of television series destined for prime time is being encouraged through partnerships between Screen Australia and the Australian Broadcasting Corporation (ABC).

1.4 LEVERAGE OPPORTUNITIES FOR INDIGENOUS WRITERS TO HONE THEIR SCRIPTS AND CRAFT

Indigenous writers need access to world-class professional development opportunities.

This study finds that jurisdictions with successful international productions have invested in the development of talented writers. A lesson learned from the jurisdictions of Australia and New Zealand is that targeted investment in talented filmmakers to hone their projects in development is a necessary element in all success. The Sundance Institute, too links the success of Indigenous filmmakers to the investments made at the development phase.²⁰²

Indigenous-run festivals, artist-run centres and other training institutions in Canada provide excellent platforms to develop talented writers. Festivals provide opportunities to hone creative skills and attract attention to talented individuals. The Sundance Festival and imagineNATIVE have grown to include training institutes that were instrumental in the development of projects that have gone on to have success with audiences.

Festivals surveyed noted the importance of ongoing professional development opportunities provided by festivals, including master classes, creative labs and workshops. Writing labs, such as those offered by the Sundance Institute and the LA Skins Festival, are popular with some filmmakers and were a factor in the

New opportunities have emerged at international Indigenous film festivals. The LA Skins Fest offers two labs for Native American filmmakers: a Feature Film Lab and a TV Writers Lab. The TV Writers Lab is for seasoned writers who have previously written shorts, features, or television scripts, with each writer working with a mentor over the five-week program and then having their script read and critiqued by network executives. The 10-week Feature Film Lab is designed to prepare Native American writers for writing careers at major film studios and production companies. As labs are high profile, they are also said to help filmmakers get noticed.²⁰³

In Canada, the imagineNATIVE Institute, launched in 2017, is the department of imagineNATIVE that oversees the Industry Days during the Festival and all year-round professional development activities for Indigenous creatives. The imagineNATIVE Institute recently launched a Story Editing Mentorship and a Screenwriting Intensive, with the goal of providing support to four screenwriters to develop option-ready feature-length scripts. The initiatives are currently seeking funding.²⁰⁴

2. PRODUCE CONTENT THAT WILL APPEAL TO INTERNATIONAL AUDIENCES

WORK WITH PARTNERS TO:

- Produce Content in Different Genres, Formats and at Internationally Competitive Budget Levels
- Produce Content for Primetime Television to Build Companies and Develop Writers
- Produce Higher-Budget Shorts to Build Skills and Advance the Careers of Creators

2.1 PRODUCE CONTENT IN DIFFERENT GENRES, FORMATS AT INTERNATIONALLY COMPETITIVE BUDGET LEVELS

Indigenous producers need access to private and public funding channels at levels that allow them to complete the financing of internationally competitive budgets. They need opportunities to produce content in a range of formats, genres, adaptations and original content. Documentary producers need access to opportunities to produce high budget documentaries (i.e. \$2 million or more) that are more likely to succeed internationally.

Competitively budgeted productions allow the attachment of marquee elements, such as well-known actors, as we have seen in other jurisdictions. It also allows for the optimal use of post-production possibilities, critical to genres such as horror and science fiction. Competitively budgeted productions also ensure that talented Indigenous producers, directors, writers, and directors of photography continue to be attached to Indigenous content as their own notoriety increases.

2.2 PRODUCE CONTENT FOR PRIMETIME TELEVISION TO BUILD COMPANIES AND DEVELOP WRITERS

The broadcasting system in Canada should ensure sufficient opportunities for Indigenous producers to produce higher-budget drama series for prime time television.

Experiments in primetime television in Australia have demonstrated that there is an appetite for Indigenous drama in primetime. The experience of Redfern Now, which averaged over one million viewers a week on the national broadcasting service ABC, demonstrates the potential appeal of Indigenous drama with wider audiences. Producers interviewed point to the enormous opportunities afforded in the television and subscription video-on-demand (SVOD) space, including Netflix. SVOD platforms are where demand for Indigenous content is said to be highest in some markets. Some producers used to working internationally are selling their television properties to foreign distributors and broadcasters.

Building on this success, it is not a stretch to imagine at least one more well funded Indigenous dramatic series each year with international appeal. The Indigenous production sector has demonstrated its capacity to produce content that can appeal to international audiences. *Blackstone* (2010-2015) has had wide international appeal, airing on Hulu and HuluPlus in the US, on New Zealand's Maori Television, and on Australia's Special Broadcasting Service/National Indigenous Television (SBS/NITV). Originally produced for APTN and Showcase, and referred to as "Canada's Sopranos" and "a step in the evolution of TV," *Blackstone* was been nominated for 86 awards including Best Dramatic Series, and Best Dramatic Writing at the Canadian Screen Awards.

Producing series for prime time, affords producers the opportunity to acquire or hone the full range of producing skills necessary to increase their capacity for producing more demanding projects. The Indigenous Strategy commissioned by the CMF notes the need to develop Indigenous producers to increase the production of Indigenous screen based content. This includes support for the acquisition of the full range of producer skills.²⁰⁶

In addition, for television series to be successful, emerging Indigenous writers need to be able to work alongside experienced non-Indigenous writers to gain experience and hone their skills and ultimately to expand the pool of experienced Indigenous writers.

2.3 PRODUCE HIGHER-BUDGET SHORTS TO BUILD SKILLS AND ADVANCE THE CAREERS OF CREATORS

Indigenous creators in Canada need opportunities to create high value, higher budget short works that can help to establish their reputations and launch their careers internationally. Opportunities are needed in all regions of the country and equally to women and men, and to English- and French-speaking creators.

The talented creators discussed in this report had multiple opportunities to create well-funded short dramas early in their careers. Screen Australia has invested repeatedly in talented filmmakers and producers, allowing them to hone their skills through successive short and feature length productions. Similarly, New Zealand has supported the development of Maori shorts and features often in partnership with the Maori industry.

Stakeholders interviewed for this report stressed the importance of these experiences for producers and directors, who benefited immensely from working with experienced executive producers who mentored them, and with professional casts and crews. Filmmakers need production opportunities, from which to learn. One producer saluted Telefilm's microbudget program for providing opportunities for filmmakers to learn through experience. Others pointed to the CBC for providing important opportunities for documentarists.

Producers in Australia and New Zealand noted that early in their careers, they had opportunities to produce short films with professional budgets, accessing funds ranging from \$80K to \$200K. Short film productions were typically shaped through the experience of writing labs and a selective process to produce the best scripts. Warwick Thornton, director of *Sweet Country* (2017) and winner of the Camera d'Or at Cannes for his first feature, *Samson and Delilah* (2009), made four short films with the support of the Indigenous Department of Screen Australia before making *Samson and Delilah*.²⁰⁷

With international festival recognition, short films can become the platform on which successful films are launched. Shorts also have the potential to reach audiences. As noted by one producer, "Today's audiences don't differentiate between formats. A short film can have a million views online." Short films are thus "incredibly important" to the development of successful feature filmmakers.²⁰⁸ Recognizing the importance of production opportunities, participants in directing and producing labs at the Sundance Institute are provided with funds to make their films.

The Province of Quebec, which has had many feature film successes, has for decades provided targeted support to young filmmakers. The SODEC currently provides substantial production funding of up to \$75,000 for short dramas or animation films by young filmmakers. This support is in the form of a grant. Award-winning filmmaker Jeff Barnaby (*Rhymes for Young Ghouls*, 2013) wrote and directed several professionally produced short films before producing his first feature.²⁰⁹ Jeff Barnaby's new film, *Blood Quantum*, recently received an investment of \$1.7 million through Telefilm Canada's regular program stream. With a total production budget of \$4.5 million²¹⁰, the film will have the highest ever production budget for an Indigenous film in Canada.

However, the French-language Indigenous production sector in Canada is said by interviewees to be less well developed than the English-language sector.

3. BUILD RELATIONSHIPS WITH DISTRIBUTORS AND SALES AGENTS

Work With Partners To:

- Leverage Attendance at Festivals and Markets to Build Professional Networks
- Leverage Festivals, Alternative Distribution Networks and Online Platforms to Promote Content and Build Audiences

3.1 LEVERAGE ATTENDANCE AT FESTIVALS AND MARKETS TO BUILD PROFESSIONAL NETWORKS

Indigenous creators need opportunities to attend Indigenous and non-Indigenous festivals and markets to meet and build relationships with buyers and decision makers from the broadcasting and online sectors. Our interviews for this study reveal the need for ongoing access to festivals and markets so that Indigenous creators can build the relationships that will advance their productions into the market.

Indigenous creators face many barriers in attending festivals and markets away from their home communities. Attending these events builds crucial knowledge of the market and supports the development of industry relationships. Interviewees noted that Indigenous creators need to attend events more than once in order to truly leverage the potential opportunities, largely because building relationships of trust takes time.

For most Indigenous films and digital media, Indigenous festivals are the first and for many the most important channel to the market. For example, Indigenous broadcasters are present at major Indigenous festivals in Canada and Australia and provide critical opportunities for sales and production. imagineNATIVE as well as the Maoriland Festival play a key role in encouraging the sale of Indigenous content to international buyers, imagineNATIVE hosts a large and rapidly increasing number of decision makers at its festival, each year, including Indigenous broadcasters and online buyers such as FNX and Shorts TV, resulting in over \$500K CAD of sales and distribution deals.

Roughly half of the festivals surveyed produce industry events. Many collaborate on these initiatives. The results of our survey also reveal interest from international Indigenous festivals to expand their sales of Indigenous content. At the same time, Indigenous festivals need to ensure that the buyer experience is optimized. Interviews revealed that buyers prefer to have advance access to screen content in order to better prepare their trips to festivals.

There is a need to create structured experiences that will allow producers to build their networks and develop lasting relationships with potential distributors, sales agents and other business partners. Interviewees

point to the need to continue to support attendance at festivals and markets through organized, structured experiences, such as preparatory bootcamps, delegations, and targeted industry events, as well as informal attendance

FESTIVALS THAT PRODUCE INDUSTRY ACTIVITIES THAT SUPPORT THE DISTRIBUTION AND SALE OF INDIGENOUS CONTENT

- Available Light Film Festival (Canada)
- Berlinale/Berlin International Film Festival (Germany)
- Big Sky Documentary Film Festival (USA)
- Hot Docs (Canada)
- imagineNATIVE Film + Media Arts Festival (Canada)
- LA Skins Film Festival (USA)
- Maoriland Film Festival (Aotearoa/New Zealand)
- Solid Screen Festival (UK)
- Sundance Film Festival (USA)
- Sydney International Film Festival (Australia)

	PERCENTAGE OF SURVEY RESPONDENTS
Festivals that produce industry activities	48 %
Festivals that produce coproduction events	21%
Festivals that produce industry markets	29%
Festivals where programming led to interest from other festivals	79%
Sales facilitated at festivals	36%

Source: Survey of Festivals

3.2 LEVERAGE FESTIVALS, ALTERNATIVE DISTRIBUTION NETWORKS AND ONLINE PLATFORMS TO PROMOTE CONTENT AND BUILD AUDIENCES

The growing number of Indigenous festivals provides an international circuit for Indigenous content, connecting Indigenous stories with a large audience of interested viewers around the world. These festivals, alternative distribution networks and online platforms are critical for promoting and providing access to Indigenous content, and for supporting the professional development of Indigenous creators. As noted above, the majority of Indigenous festivals screen Canadian productions.

Success begins at home. Around the country, Indigenous-led and community-based festivals and exhibitors, often working Indigenous-led circuits or other film circuits such as TIFF and Reel Canada, take the best Indigenous content to communities across the country. The vast majority of festivals surveyed for this report are showcasing Indigenous content from Canada, including features, shorts and interactive content. Many are involved in the distribution of Indigenous productions, particularly as regards institutional markets.²¹¹

As noted by festivals and producers surveyed for this report, these networks represent the foundation of distribution of Indigenous content in Canada and abroad. They increase the visibility and access to Indigenous content, engage Audiences and raise levels of media literacy. In remote areas these networks may be the only access that people have to experience Indigenous content. The distribution and promotion taking place through this activity provides an important complement to commercial marketing and distribution and can

help to create buzz and position content for success internationally.

Festivals and community-based screenings play an essential role in promotion and building awareness of Indigenous screen-based content. For this reason, when public and philanthropic funders and sponsors measure the performance and impact of Indigenous content with Canadian audiences, free and paid screenings at all venues, including Indigenous-led festivals and other community organizations, should be taken into consideration.

4. INCREASE EXPORTS AND SALES IN FOREIGN MARKETS

Work With Partners To:

- Enhance the Indigenous Market Stand at the EFM to Increase Sales
- Promote Indigenous Content to Buyers at Major International Markets
- Leverage Online Opportunities to Reach Global Audiences

4.1 ENHANCE THE INDIGENOUS MARKET STAND AT THE EFM TO INCREASE SALES

For Indigenous content producers, participation at major international markets in Berlin, Cannes, Sundance and TIFF are critical to securing international distribution and sales and to facilitate coproduction opportunities. Interviewees note the great opportunities afforded in the international market, and laud the work done by imagineNATIVE to develop an Indigenous market presence at the European Film Market (EFM), which takes place in conjunction with the Berlinale (Berlin International Film Festival) in Berlin.

However, in comparison to other Canadian initiatives to promote Canadian content at international markets, the Indigenous presence at the EFM is modest. More can be done to enhance the experience, beginning with providing opportunities for a greater number of Indigenous creators to attend the market and Berlinale each year. The EFM provides an opportunity to host financing fora, international coproduction immersions, networking events as well as workshops and professional development opportunities. Initiatives could be developed to bring producers and distributors together, such as hosting distributor screenings and facilitating the organization of meetings. Canadian organizations could also produce market readiness training, or “bootcamps” to prepare Indigenous producers for their business trips to the EFM. To achieve this, greater collaboration is needed between imagineNATIVE and its partners at the EFM, Canadian and provincial funders, and national training organizations.

The Canada Council for the Arts supported imagineNATIVE to lead the organization of the Indigenous market stand at the European Film Market, in conjunction with the NATIVE program of the Berlinale. This initiative is continuing for the 2019 EFM with support from international partnerships.

imagineNATIVE could consider collaborating with funders and other organizations that seek a Canadian presence at markets, to maintain the Indigenous presence at the EFM into future years and to promote Indigenous films at the European Film Market, with a view to securing deals for Indigenous producers. The EFM is also an opportunity for Indigenous organizations to build their own relationships with non-Indigenous distributors, sales agents and buyers, with a view to diversifying the types of buyers that attend Indigenous festivals and other events. The Creative Canada Export Fund may provide opportunities to fund some of these activities. Collaboration between Indigenous organizations is already taking place in this regard. Greater involvement by larger organizations with developed expertise in the sector, such as Canadian and provincial funders, is needed to continue to support imagineNATIVE in creating a world-class destination for a wide array of international buyers.

4.2 PROMOTE INDIGENOUS CONTENT TO BUYERS AT MAJOR INTERNATIONAL MARKETS

There is a need to more greatly promote Indigenous content at international markets. The federal government's Creative Canada Policy Framework is aimed at creating a favourable environment for Canadian cultural exports by promoting Canadian creators to international markets.

There is great potential of sales of Indigenous content as evidenced by their enthusiastic reception by audiences around the world, and closer to home, the NFB's experience of sales of Indigenous content and APTN's intention to expand its distribution arm.

As noted by Telefilm Canada, "markets are important for Canadian production as they stimulate the sale of Canadian works and facilitate pre-financing of productions and partnerships for potential coproduction projects."

THREE OF THE NFB'S TOP 10 SELLING TITLES OF 2017-2018

- Our People Will be Healed (2017) by Alanis Obomsawin
- Angry Inuk / Inuk en Colère (2016) by Alethea Arnaquq-Baril
- Birth of a Family (Tasha Hubbard, 2016).

Source: NFB

The Sundance Festival does not have a formal market, however the festival prominently features indigenous films and the event is the most important informal market in the world for independent film. Canadian funders already do an excellent job of promoting the sale of Canadian screen-based content through the Canada Pavillion at the Cannes Film Market, MIPTV, MIPCOM, Sunny Side of the Doc and MIFA.) There is a need to organize trade missions with delegations of Indigenous creators to major markets such as TIFF, the Sundance Festival and at key digital media markets including the Game Developers' Conference (GDC), E3 and the SXSW Gaming Expo.

4.3 LEVERAGE ONLINE OPPORTUNITIES TO REACH GLOBAL AUDIENCES

Online streaming presents a major opportunity for the distribution of Indigenous screen-based content. As noted in our interviews, in the US, the market for digital platforms keeps growing, creating many more opportunities for series and for genre content, which is said to work well.²¹² Buyers are interested in a variety of formats. American Indigenous broadcaster FNX notes that it acquires content in all formats and running times at ImagineNATIVE. Shorts TV is interested in series and also attend the festival.²¹³ There is also an appetite for content produced in Indigenous languages. Versioning them into English affords additional opportunities. Indigenous-owned streaming platform NativeFlix provides both distribution and production opportunities.²¹⁴

As author Marcia Nickerson points out, digital distribution models have the potential to leverage global audiences' demand for niche programming. "If this proves to be the case, Indigenous films will have the potential to reach a global niche market of Indigenous and non-Indigenous audiences seeking this content."²¹⁵

Many interviewees are of the view that a dedicated platform could provide a second life for many productions that are not distributed beyond the festival market, as well as older films currently out of distribution, but with ongoing interest to niche audiences. Such a platform could provide an added revenue stream for producers. APTN is an important commissioner of convergent content. However, Indigenous content has difficulty finding its place on the VOD platforms of Canadian broadcasters. A study of the Indigenous Screen sector in Canada notes that access to online distribution channels

FESTIVALS PRESENTING INNOVATIVE DIGITAL PROJECTS, SUCH AS EXPERIENCES IN VR OR AR

- imagineNATIVE Film + Media Arts Festival (Canada)
- Indianer Inuit: North American Native Film Festival (Germany)
- Maoriland Film Festival ((Aotearoa/ New Zealand)
- Solid Screen Festival (Australia)
- Tampere International Short Film Festival (Finland)
- Vision Maker Film Festival (USA)
- Winda Film Festival (Australia)

SOURCE: SURVEY OF FESTIVALS

for Indigenous content is a key challenge. To maximize opportunities to reach audiences, Indigenous content needs to be available and accessible on multiple platforms.²¹⁶

4.3.1 BUILD DIGITAL SKILLS

To strengthen Indigenous-led convergent content production, Indigenous creators need opportunities to develop their interactive digital media skills and stay abreast of developments in this area. Doing so allows producers to better understand their online audience, and readies them to exploit commercial opportunities.

FESTIVALS PRESENTING CONTENT ONLINE

- Augsberg College Native American Film Series (USA)
- Hot Docs (Canada)
- imagineNATIVE Film + Media Arts Festival (Canada)
- La Skins Film Festival (USA)
- Native Spirit Film Festival (UK)
- Solid Screen Festival (Australia)
- Wairoa Maori Film Festival (Aotearoa/ New Zealand)
- Winnipeg Film Group/Cinémathèque

SOURCE: SURVEY OF FESTIVALS

A number of festivals surveyed for this report, including imagineNATIVE and Hot Docs indicated that they present online or interactive digital media productions by Indigenous artists at their events. It is important to support experimentation in interactive digital media to build skills amongst Indigenous storytellers and expand the career opportunities of talented creators. The Canada Council for the Arts supports media arts experimentation, including Canadian festivals and media arts organizations that provide opportunities for the creation and presentation of interactive experiences. This support ensures that Indigenous creators in all parts of the country have opportunities to produce and exhibition interactive productions.

DIGITAL INNOVATION AT INDIGENOUS FESTIVALS	PERCENTAGE OF SURVEY RESPONDENTS
Augsberg College Native American Film Series (USA)	28%
Hot Docs (Canada)	28%

Source: Survey of Festivals

4.3.2 ENCOURAGE THE CREATION OF A SHARED COMMERCIAL VOD PLATFORM FOR INDIGENOUS CONTENT

It has been suggested that the “NFB, CBC and APTN could assist in supporting a new system that includes an online Indigenous movie channel or channels where Indigenous children can watch programming in their own languages.”²¹⁷ APTN’s online programming could be enhanced with greater resources, particularly with programming aimed at children, youth and young adults, the largest segment of the Indigenous population in Canada. It is anticipated that the NFB Indigenous Cinema online screening platform will continue to be enhanced with new productions.

A number of online initiatives have proven the popularity of streamed Indigenous content with audiences in Canada and worldwide. The Indigenous news platform of the CBC²¹⁸ is one of the public broadcasters’ most popular online destinations. Programming from the platform is also available on social media, which are followed by over 1.2 million users.

NUMBER OF FOLLOWERS TO CBC NEWS – INDIGENOUS ON SOCIAL MEDIA

SOCIAL MEDIA PLATFORM	NUMBER OF FOLLOWERS
1. Youtube	898,000)
2. Facebook	208,842
3. Twitter	77,700
4. Instagram	19,400
Total	1,203,942

Sources: CBC Indigenous Platforms on Youtube, Facebook, Twitter and Instagram

Isuma.TV (Igloolik Isuma Productions) is the first international online platform for Indigenous audiovisual productions from around the world. Modeled on other video sharing platforms, the site “currently carries over 6000 videos in more than 80 languages on over 800 user-controlled channels created by producers in Canada, the U.S.A., Greenland, Norway, Sweden, Russia, Australia, New Zealand and all over Latin America.”²¹⁹ The CMF has invested in the development of isuma.tv.

The Telus Storyhive platform has encouraged many Indigenous filmmakers to make their first professional films. Other platforms are also being developed, notably by the LA Skins Festival and the International Sami Film Institute. The Canada Council for the Arts, which has invested in VUCAVU, an online platform for the distribution of independent artists’ media projects, could take a similar approach to promoting Indigenous content online destined for these platforms.

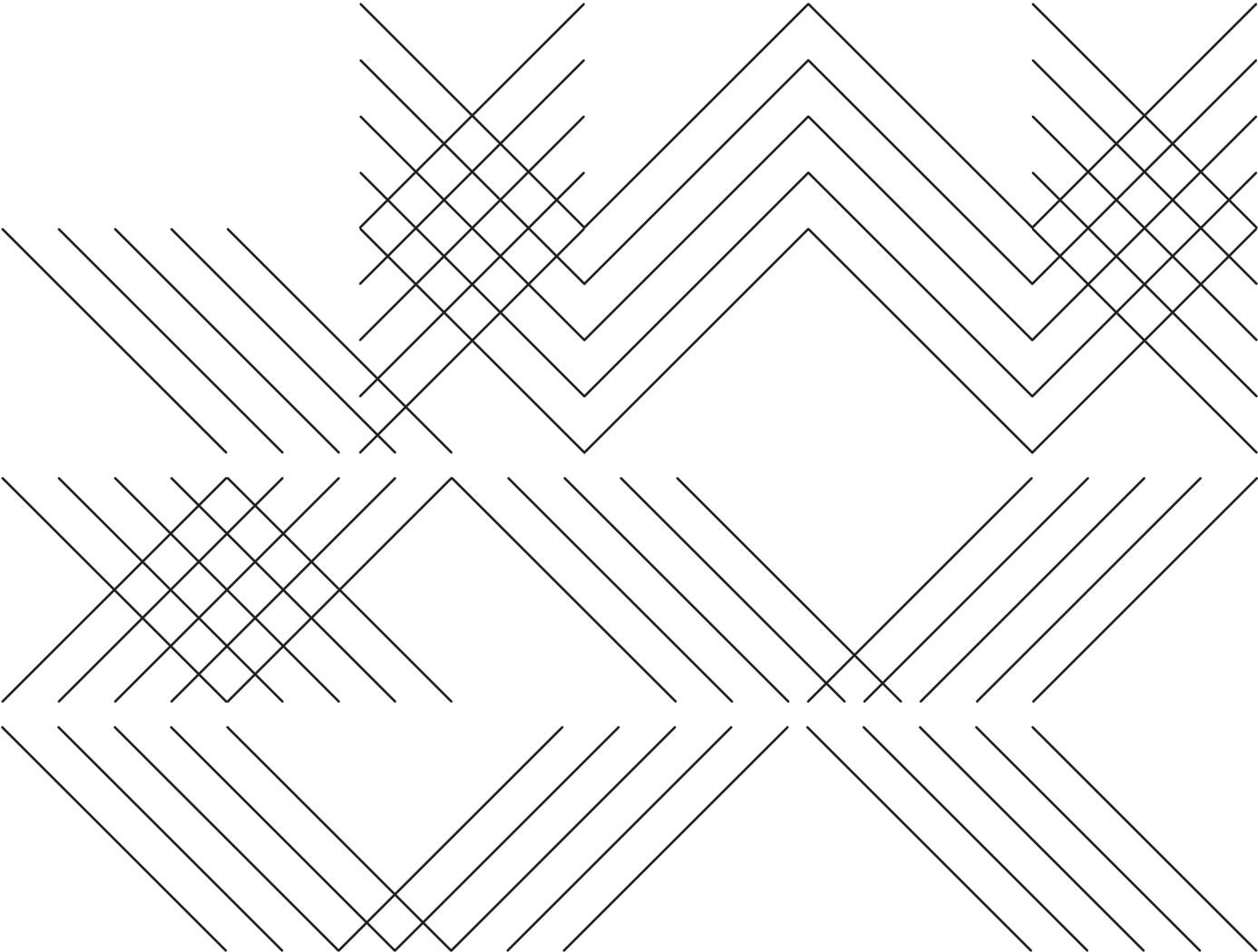
CONCLUSION

In implementing this Strategy, the Indigenous screen sector will need to work with a range of partners and collaborator, including: federal, provincial and territorial funders, private sector financiers including distributors, sales agents, philanthropic organizations and other private investors, national and regional public broadcasters, Indigenous and non-Indigenous online distribution platforms, In-digenous and non-Indigenous training institutes, and international funders, festivals and markets. Many of these have been identified throughout this report. Collaboration will involve the full breadth of the Indigenous screen-based production sector, which is comprised of production companies, the Alliance of Aboriginal Media Producers (AAMP), festivals, artist-run centres, training institutes and the Indigenous Screen Office. The figure below

provides a summary view of the types of collaborators that can assist the Indigenous Screen Sector to realize its goals for international success, as presented in this strategy.

- ¹⁵² Tanui Stephens, "What Makes a Maori Film," *NZT Echo*, Issue 76, Autumn 2018, page 14.
- ¹⁵³ Interviews.
- ¹⁵⁴ SPI Olsberg, *Building Sustainable Film Businesses: The Challenges for Industry and Government*, Independent Research report sponsored by Film i Vast, PACT and the Swedish Film Institute, June 2012.
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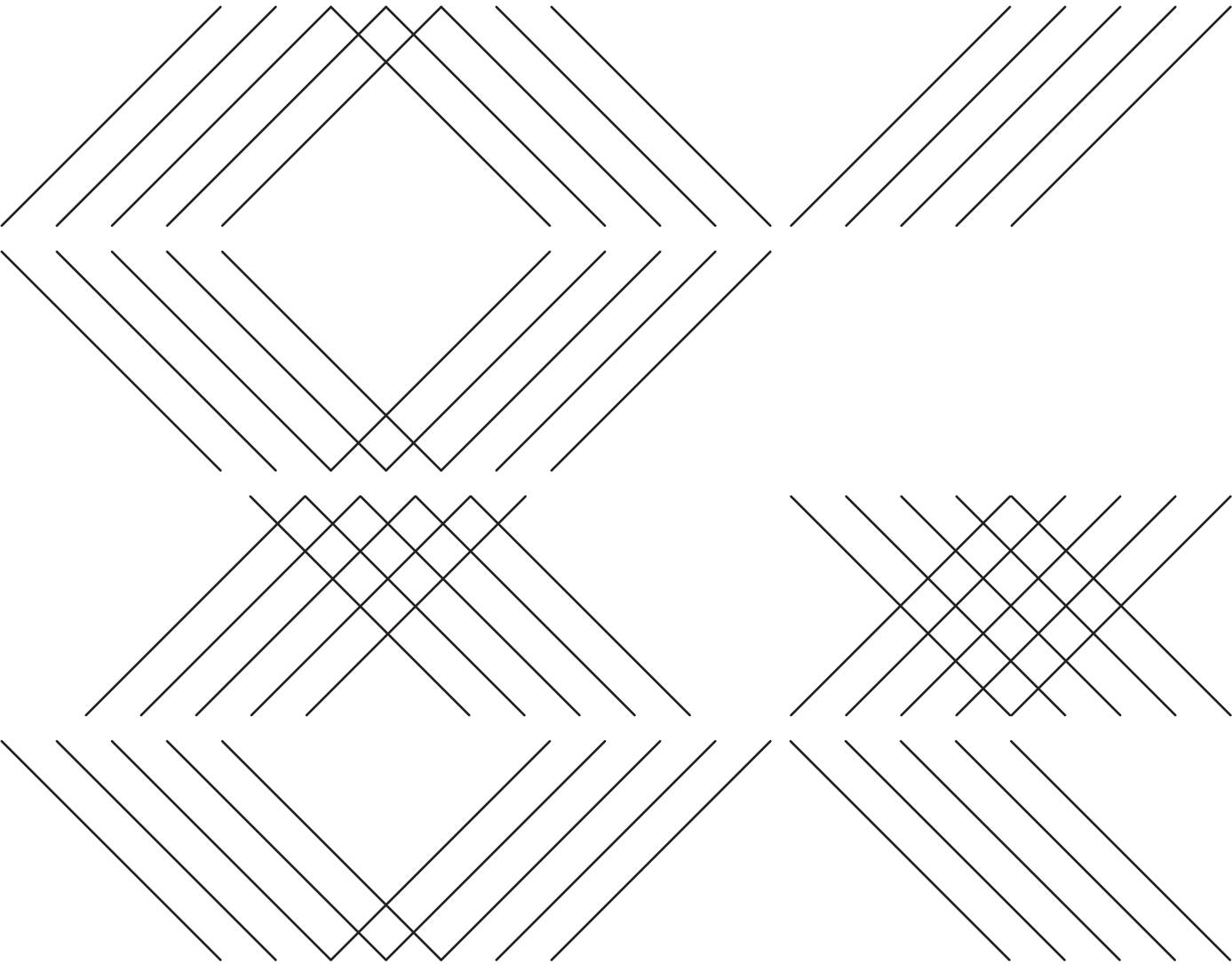
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ANNEX 2: SUMMARY OF RESULTS OF ON-LINE QUESTIONNAIRE
WITH FESTIVALS



1. SUMMARY ANALYSIS OF SURVEY RESPONSES

1.1 PROFILE OF SURVEY RESPONDENTS

This study surveyed festivals and selected presenters who consistently present Indigenous screen content.

Thirty-two festivals responded to the survey, with an average completion rate of 81%. These festivals are located throughout Canada, the USA, Europe, the Nordic Region, Australia and New Zealand. All presented Indigenous content at their most recent edition. Almost two-thirds of respondents (61%) primarily present Indigenous content.

The vast majority of respondents (87.5%) host an annual event. 72% of festivals held their most recent edition earlier in 2018. Three festivals also organize additional screenings throughout the year. A third of the festivals surveyed (twelve festivals in all), have large audiences of 10,000 people or more.

The majority (78%) of respondents have been in existence for over 10 years. At the same time, the appeal of Indigenous stories told by Indigenous artists continues to grow, as evidenced by the recent emergence of new festivals in Canada, the United States and New Zealand.

1.2 THE POPULARITY OF INDIGENOUS CONTENT AT FESTIVALS

Audiences for Indigenous content at festivals worldwide are significant and growing. The festivals surveyed for this report attract over 400,000 people to their events each year. Indigenous content features prominently at these festivals and for many, constitutes the primary body of work presented.

Major international festivals now have dedicated Indigenous programming streams. Seven respondents indicated they have an audience of greater than 25,000 people each year, including: the Berlinale (Berlin), the Hawaii International Film Festival (Honolulu), Hot Docs (Toronto) Reel Canada (Toronto/Canada), the Sundance International Film Festival (Park City, Utah), and the Sydney Film Festival (Sydney, Australia). imagineNATIVE Film + Media Festival (Toronto) is the largest Indigenous festival worldwide, presenting over 200 Indigenous screen-based productions, and ranks amongst the other major festivals, with a total audience of over 25,000. Another six respondents have audiences of more than 10,000 people.

Survey respondents note the importance of the emergence of dedicated Indigenous festivals and the showcasing of indigenous works at major international festivals as factors contributing to the rising popularity of Indigenous productions. Indigenous screen production has a rich and varied history linked to global Indigenous cultural and political movements and efforts towards language preservation and restoration. The success of Indigenous media has been attributed to talented storytelling and the success of major hits, which are fueling greater interest amongst audiences.

1.3 FESTIVALS ARE PROGRAMMING A DIVERSE SELECTION OF CONTENT: FEATURE FILMS, SHORTS AND INTERACTIVE CONTENT

The vast majority of festivals are showcasing Indigenous content from Canada, including features, shorts and interactive content. Six festivals presented more than 10 feature films by Indigenous creators at the last edition of their festival. Six festivals also presented over 50 short films or videos. One festival, imagineNATIVE, presented over 200 short works.

Six festivals presented over 10 feature films by Indigenous creators in their last edition.. Almost half (48%) of respondents, thirteen festivals in all, presented Indigenous interactive works. The majority of works presented were VR projects. For example, *2167 - An Indigenous VR Project* by Canadian artists Danis Goulet, Kent

Monkman and Scott Benesiinaabandan and the interdisciplinary arts collective Postcommodity and produced in association with imagineNATIVE was presented at two festivals. One festival presented *Eagle Bone*, billed as the first North American VR film to be directed by an Indigenous director, Tracy Rector. Interactive games were also presented, including the Canadian interactive games *Coyote's Crazy Smart Science Show*, based on the television series by Loretta Todd for APTN, *Purity & Decay* by artists Meaghan Byrne and Tara Miller (produced in association with imagineNATIVE), and *Thunderbird Strike* by American artists Elizabeth La Pensée and NÀHGA aka Casy Koyczan.

Over a quarter (28%) of festivals surveyed presented Indigenous content to their audiences online, including linear video, digital media, interactive and audio works. The majority presented fewer than ten titles. Viewing numbers are modest, with the exception of Australia, where the Wairoa Maori Film Festival screened two videos that attracted 15,000 views each on Facebook, and the Solid Screen Festival attracted over 25,000 views to its Indigenous content online. In New Zealand, two short films were launched on NZ On Screen, affording them heightened visibility.

For the majority of festivals, the programming of Indigenous works is creating interest from programmers at other festivals. 80% of festivals surveyed indicated that their programs sparked interest and led to new programming at other festivals. Indigenous festivals from New Zealand, Australia, Canada, and the U.S. said that their Indigenous content is often programmed by other Indigenous festivals, creating a successful, global Indigenous festival circuit.

1.4 FESTIVALS PLAY A KEY ROLE IN THE SUCCESS OF INDIGENOUS PRODUCTIONS

Almost all respondents share the view that festivals are the leading promoters, exhibitors, and celebrators of Indigenous productions and that they are one of the only platforms for Indigenous productions to be seen, making them extremely important. Audience engagement including Q&As, panels, and networking events, when offered at Festivals, are instrumental in creating a deeper understanding of Indigenous productions for Indigenous and non-Indigenous audiences. It is interesting to note that a couple of festivals attributed shifting their focus from stories about Indigenous people to stories by Indigenous people as a driver of success. Youth-centred programming, including screenings and youth-focused workshops and labs are said to be particularly successful with younger people.

The greatest successes are attributable to what is perceived as the remarkable achievement of creating a robust network of festivals that regularly promote and screen Indigenous works and provide opportunities for Indigenous content to reach audiences, to have successful festival runs, and to be acquired by broadcasters and distributors. It was noted that in recent years, more Indigenous content has been screened at festivals, leading to more opportunities for Indigenous production.

Other success factors include the ability to expand professional development opportunities for Indigenous filmmakers. Almost half (48%) of all festivals organize industry events aimed at Indigenous projects, professionals and companies. Most popular are panels and networking events (79%, respectively) and workshops (64%). Panels and networking events are said to facilitate connections between local and international Indigenous filmmakers, leading to partnerships and career opportunities. One respondent noted the importance of "creating spaces, meeting points and hubs for industry and talent," at festivals.

Many festivals noted the lack of training opportunities for emerging talent. One respondent suggested that festivals can play a greater role as incubators for emerging talent, such as through master classes, creative labs and workshops.

1.5 THE ROLE OF FESTIVALS IN GROWING INDIGENOUS PRODUCTION WORLDWIDE

The greatest challenges most frequently cited by respondents are the lack of funding from major institutions and broadcasters and limited support for distribution of Indigenous content. Indigenous content is said to still be largely viewed as 'niche' with limited appeal for broad audiences, resulting in the marginalization and separation of Indigenous stories. Some noted the lack of familiarity with Indigenous storytelling, particularly among decision-makers. Festivals provide an essential service to the industry through their activities that support for the production, distribution and sale of Indigenous content.

Festivals Support Production and Coproduction

The growing popularity of Indigenous content is driving greater Indigenous content production. Respondents recognize the need to support the financing of indigenous production, for example through pitch sessions and networking events between financiers and producers. Festivals see that the festival sector can play a greater role by creating dedicated spaces for Indigenous productions to be seen by "mainstream" industry representatives. In this regard, 42% of festivals already organize industry screenings.

International festivals are considered natural platforms for encouraging coproductions. Most respondents are of the view that festivals can encourage Indigenous international coproductions by: prioritizing international festival invitations, hosting coproduction panels, providing networking opportunities for international attendees focused on coproduction, promoting local talent, and by tapping into existing international partnerships. Some respondents feel that without the encouragement of festivals, coproductions for Indigenous content might not happen.

Three festivals organized coproduction initiatives: the Wairoa Maori Film Festival, the Maoriland Film Festival and imagineNATIVE Film + Media Festival. Some festivals see opportunities in the formation of partnerships with other organizations, both Indigenous and non-Indigenous. One respondent noted that smaller initiatives are already taking place to bring delegations from one country to another and could be amplified. One suggestion put forward was to make current coproductions more visible, and to provide case studies of successful ventures.

Festivals Encourage Sales of Indigenous Productions at Markets

Four festivals organize an industry market or market event intended to encourage sales of Indigenous productions: Berlinale - European Film Market, the LA Skins Festival, the Maoriland Film Festival and imagineNATIVE Film + Media Festival. In partnership with the Berlinale, imagineNATIVE leads a consortium of international partners in the creation of an Indigenous content stand at the European Film Market each year. In addition, the imagineNATIVE festival in Toronto facilitated over

\$500K of sales and distribution deals. For its part, the LA Skins Festival has facilitated over \$100K in sales and distribution of Indigenous content.

Distribution Opportunities Through Festivals

One third of festivals also distribute Indigenous content to other festivals (70%), educational markets (60%), streaming platforms (50%), television (30%) and theatrical markets (30%). One respondent suggested that the knowledge residing in Indigenous festivals could be used to create an online platform as a means of getting more films to audiences, particularly as regards remote locations.

2. SURVEY RESPONSES

2.1 ABOUT THE RESPONDENTS

1. HOW OFTEN DOES YOUR FESTIVAL TAKE PLACE? (SELECT ONE)

ANSWER CHOICES	RESPONSES	
Annual	7.50%	28
Bi-annual	12.50%	4
Other (please explain)		6
	Answered	32

Amongst the "other" frequencies were monthly, bi-monthly and twice per year.

2. HOW MANY YEARS HAS YOUR FESTIVAL BEEN IN EXISTENCE?

ANSWER CHOICES	RESPONSES	
Less than 5 years	3.13%	1
5 to 10 years	18.75%	6
More than 10 years	78.13%	25
	Answered	32

3. IN WHAT YEAR WAS YOUR MOST RECENT FESTIVAL PRODUCED?

ANSWER CHOICES	RESPONSES	
2018	71.88%	23
2017	25.00%	8
2016	0.00%	0
2015 or earlier	3.13%	1
	Answered	32

4. DOES YOUR FESTIVAL PRESENT PRIMARILY INDIGENOUS SCREEN-BASED CONTENT?

ANSWER CHOICES	RESPONSES	
Yes	61.29%	19
No	38.71%	12
	Answered	31

5. HOW MANY PEOPLE ATTENDED (TOTAL AUDIENCE) THE MOST RECENT EDITION OF YOUR FESTIVAL?

ANSWER CHOICES	RESPONSES	
Less than 1,000	9.68%	3
1,000 to 5,000	38.71%	12
5,001 to 10,000	12.90%	4
10,001 to 25,000	16.13%	5
More than 25 000	22.58%	7
	Answered	31

2.2 INDIGENOUS CONTENT PRESENTED AT FESTIVALS

6. PLEASE INDICATE HOW MANY INDIGENOUS PRODUCTIONS WERE PRESENTED AT THE MOST RECENT EDITION OF YOUR FESTIVAL FOR EACH OF THE FOLLOWING CATEGORIES:							
	None	Less than 5	5 to 10	10 to 25	25 to 50	50 to 100	100 to 200
Indigenous feature films or video	1	11	9	6	0	1*	0
Indigenous short films and videos	0	4	6	6	5	6	1
Indigenous interactive productions	14	7	4	2	0	0	0

* Reel Canada

7. HOW MANY DIFFERENT COUNTRIES DID YOUR INDIGENOUS PRODUCTS ORIGINATE FROM?

ANSWER CHOICES	RESPONSES	
Fewer than 5	51.72%	15
5 to 10	24.14%	7
10 to 25	13.79%	4
More than 25	10.34%	3
More than 25 000		
	Answered	29

8. IN THE MOST RECENT EDITION OF YOUR FESTIVAL, HOW MANY INDIGENOUS PRODUCTIONS WERE FROM CANADA?

ANSWER CHOICES	RESPONSES	
None	10.34%	3
1 to 5	34.48%	10
5 to 10	13.79%	4
10 to 25	10.34%	3
25 to 50	17.24%	5
50 to 100	10.34%	3
More than 100	3.45%	1
	Answered	29

9. IN THE MOST RECENT EDITION, DID YOUR FESTIVAL PRESENT ANY INDIGENOUS CONTENT ON AN ONLINE SCREENING PLATFORM?

ANSWER CHOICES	RESPONSES	
Yes	27.59%	8
No	72.41%	21
	Answered	29

10. HOW MANY INDIGENOUS PRODUCTIONS WERE PRESENTED ONLINE AT YOUR MOST RECENT FESTIVAL?

ANSWER CHOICES	RESPONSES	
Less than 5	50.00%	15
5 to 10	12.50%	7
10 to 25	37.50%	4

11. HOW MANY USERS VIEWED OR INTERACTED WITH THIS INDIGENOUS CONTENT ONLINE AT YOUR MOST RECENT FESTIVAL?

ANSWER CHOICES	RESPONSES	
Less than 1,000	62.50%	5
1,000 to 5,000	12.50%	1
5,001 to 10,000	0.00%	0
10,001 to 25,000	12.50%	1
More than 25,000	12.50%	1
You can expand on your answer here		2
	Answered	8

Additional Comments:

Two videos screened on Facebook received 15,000 views each. Two short films were launched on NZ On Screen. One festival reported that they presented digital media, interactive and audio works online.

12. AT THE MOST RECENT EDITION OF YOUR FESTIVAL, DID YOU PRESENT ANY INTERACTIVE WORK BY INDIGENOUS CREATORS, SUCH AS A VR EXPERIENCE, AN AR EXPERIENCE, AN INTERACTIVE INSTALLATION?

ANSWER CHOICES	RESPONSES	
Yes	27.59%	8
No	72.41%	21
	Answered	29

Comments: The majority of works presented were VR projects. For example, *2167 - An Indigenous VR Project* by Canadian artists Danis Goulet, Kent Monkman and Scott Benesiinaabandan and the interdisciplinary arts collective Postcommodity and produced in association with imagineNATIVE was presented at two festivals. One festival presented *Eagle Bone*, billed as the first North American VR film to be directed by an Indigenous director, Tracy Rector. Interactive games were also presented, including the Canadian interactive games *Coyote's Crazy Smart Science Show*, based on the television series by Loretta Todd for APTN, *Purity & Decay* by Meaghan Byrne and Tara Miller (produced in association with imagineNATIVE), and *Thunderbird Strike* by American artists Elizabeth La Pensée and NÀHGA aka Casy Koyczan.

13. HOW MANY USERS INTERACTED WITH THIS INTERACTIVE WORK AT YOUR MOST RECENT FESTIVAL?

ANSWER CHOICES	RESPONSES	
0 to 100	37.50%	3
101 to 250	50.00%	4
251 to 500	0.00%	0
501 to 1000	12.50%	1
More than 1000	0.00%	0
You can expand on your answer here		2
	Answered	8

Comments: It was noted by one respondent that many more users interacted online. Another festival indicated that the interactive artist was a guest of the festival.

14. DID THE PROGRAMMING OF INDIGENOUS CONTENT AT YOUR MOST RECENT EDITION OF YOUR FESTIVAL LEAD TO INTEREST FROM OTHER FESTIVALS OR FESTIVAL PROGRAMMERS TO PRESENT INDIGENOUS SCREEN-BASED PRODUCTIONS?

ANSWER CHOICES	RESPONSES	
Yes	79.31%	23
No	20.69%	6
	Answered	29

Comments: The vast majority of the respondents answered yes, that programming Indigenous content not only drew interest from programmers and organizations but in some instances directly resulted in these works being programmed at other festivals. Indigenous festivals from New Zealand, Australia, Canada, and the U.S. said that their Indigenous content is often programmed by other Indigenous festivals, creating a successful, global Indigenous festival circuit.

2.3 INDUSTRY ACTIVITIES SUPPORTING INDIGENOUS CONTENT

15. IN THE MOST RECENT EDITION OF YOUR FESTIVAL, DID YOU PRODUCE ANY INDUSTRY EVENTS AIMED AT INDIGENOUS PROJECTS, PROFESSIONALS AND/OR COMPANIES?

ANSWER CHOICES	RESPONSES	
Yes	48.28%	14
No	51.72%	15
	Answered	29

16. IF YOU ANSWERED YES, PLEASE INDICATE WHAT TYPE OF INDUSTRY ACTIVITY(IES) YOU PRODUCED. SELECT ALL THAT APPLY.

ANSWER CHOICES	RESPONSES	
Pitch Session	28.57%	4
Panels	78.57%	11
Workshops	64.29%	9
Industry Screenings	42.86%	6
Networking events	78.57%	11
Coproduction event	21.43%	3
Industry market	28.57%	4
Other (please specify)	35.71%	5
	Answered	14

Comments:

The industry activities mentioned by respondents included the Solid Screen Retreat for Indigenous Women Storytellers; the launch of He Wiki Kiriata Maori Film Week; two keynote speeches and a market stand at the European Film Market promoting sales of Indigenous productions, led by imagineNATIVE in partnership with the Berlinale and other international partners.

17. IN THE MOST RECENT EDITION OF YOUR FESTIVAL, DID YOUR FESTIVAL FACILITATE THE SALES OR DISTRIBUTION OF INDIGENOUS CONTENT?

ANSWER CHOICES	RESPONSES	
Yes	34.48%	10
No	65.52%	19
	Answered	29

18. IF YOU ANSWERED YES, WHAT WAS THE TOTAL VALUE OF THESE DEALS?

ANSWER CHOICES	RESPONSES	
Less than \$5,000	70.00%	7
\$5,001 to \$10,000	10.00%	1
\$10,000 to \$25,000	0.00%	0
\$25,001 to \$50,000	0.00%	0
\$50,001 to \$100,000	0.00%	0
\$100,001 to \$200,000	10.00%	1
\$200,001 to \$300,000	0.00%	0
\$300,001 to \$500,000	0.00%	0
More than \$500,000	10.00%	1
	Answered	10

19. DOES YOUR FESTIVAL DISTRIBUTE ANY INDIGENOUS PRODUCTIONS?

ANSWER CHOICES	RESPONSES	
Yes	34.48%	10
No	65.52%	19
	Answered	29

20. IF YOU ANSWERED YES, PLEASE INDICATE IN WHICH MARKETS YOUR FESTIVAL DISTRIBUTES INDIGENOUS PRODUCTIONS. SELECT ALL THAT APPLY.

ANSWER CHOICES	RESPONSES	
Educational market	60.00%	6
Gaming platform	0.00%	0
Other festivals or festival networks	70.00%	7

2.4 CHALLENGES AND OPPORTUNITIES

21. TO WHAT DO YOU ATTRIBUTE THE “RISING TIDE” OF INDIGENOUS PRODUCTIONS?

Respondents indicated that there are numerous factors that have contributed to the rising tide of Indigenous productions including: increased access to government funding and changing governmental policies, the emergence of dedicated Indigenous festivals and networking opportunities, the success of films like *Atarnajuat*, *The Fast Runner* (Canada) and *Rabbit Proof Fence* (Australia), and increased awareness of Indigenous issues. Several respondents felt that there is a growing audience for Indigenous films that is driving the production of Indigenous works, and that global Indigenous cultural and political movements, such as efforts towards language preservation and restoration, have also contributed. Respondents also cited the talent and hard work of Indigenous storytellers in the industry.

22. WHAT ROLE HAVE FESTIVALS PLAYED IN THE SUCCESS OF INDIGENOUS PRODUCTIONS?

Almost all respondents indicated that festivals are the leading promoters, exhibitors, and celebrators of Indigenous productions and that they are one of the only platforms for Indigenous productions to be seen, making them extremely important. It was noted that in recent years, more Indigenous content has been screened at festivals, leading to more opportunities for Indigenous production. Audience engagement including Q&As, panels, and networking events, when offered at Festivals, are instrumental in facilitating connections between local and international Indigenous filmmakers, leading to partnerships and career opportunities, and in creating a deeper understanding of Indigenous productions for Indigenous and non-Indigenous audiences. As one respondent noted, “Festivals can support Indigenous productions not only by screening Indigenous films but also by creating spaces, meeting points and hubs for industry and talent.” Another suggested that the knowledge residing in Indigenous festivals could be used to create an online platform as a means of getting more films to audiences, particularly as regards remote locations.

23. WHAT HAVE BEEN THE GREATEST INDIGENOUS SUCCESS STORIES AT YOUR FESTIVAL? WHAT FACTORS CONTRIBUTED TO SUCCESS?

The majority of the greatest success stories focused on the remarkable achievement of creating a robust network of festivals that regularly promote and screen Indigenous works and provide opportunities for Indigenous content to reach audiences, to have successful festival runs, and to be acquired by broadcasters and distributors. Other success stories included the ability to expand professional development opportunities for Indigenous filmmakers, and forming partnerships with other organizations, Indigenous and non. A couple of festivals attributed shifting their focus from stories about Indigenous people to stories by Indigenous people as a driver of success. Youth-centred programming, including screenings and youth-focused workshops and labs are particularly successful with younger people.

24. WHAT DO YOU SEE AS THE GREATEST CHALLENGES FACING INDIGENOUS PRODUCTION?

The biggest challenges most frequently cited were: lack of funding from major institutions and broadcasters, lack of training opportunities, limited support for distribution of Indigenous content, and the marginalization and separation of Indigenous content - it is still largely viewed as 'niche' and having limited appeal for broad audiences. Some noted the lack of familiarity with Indigenous storytelling, particularly among decision-makers, as a challenge. One festival noted the lack of access to coproduction as limiting opportunities.

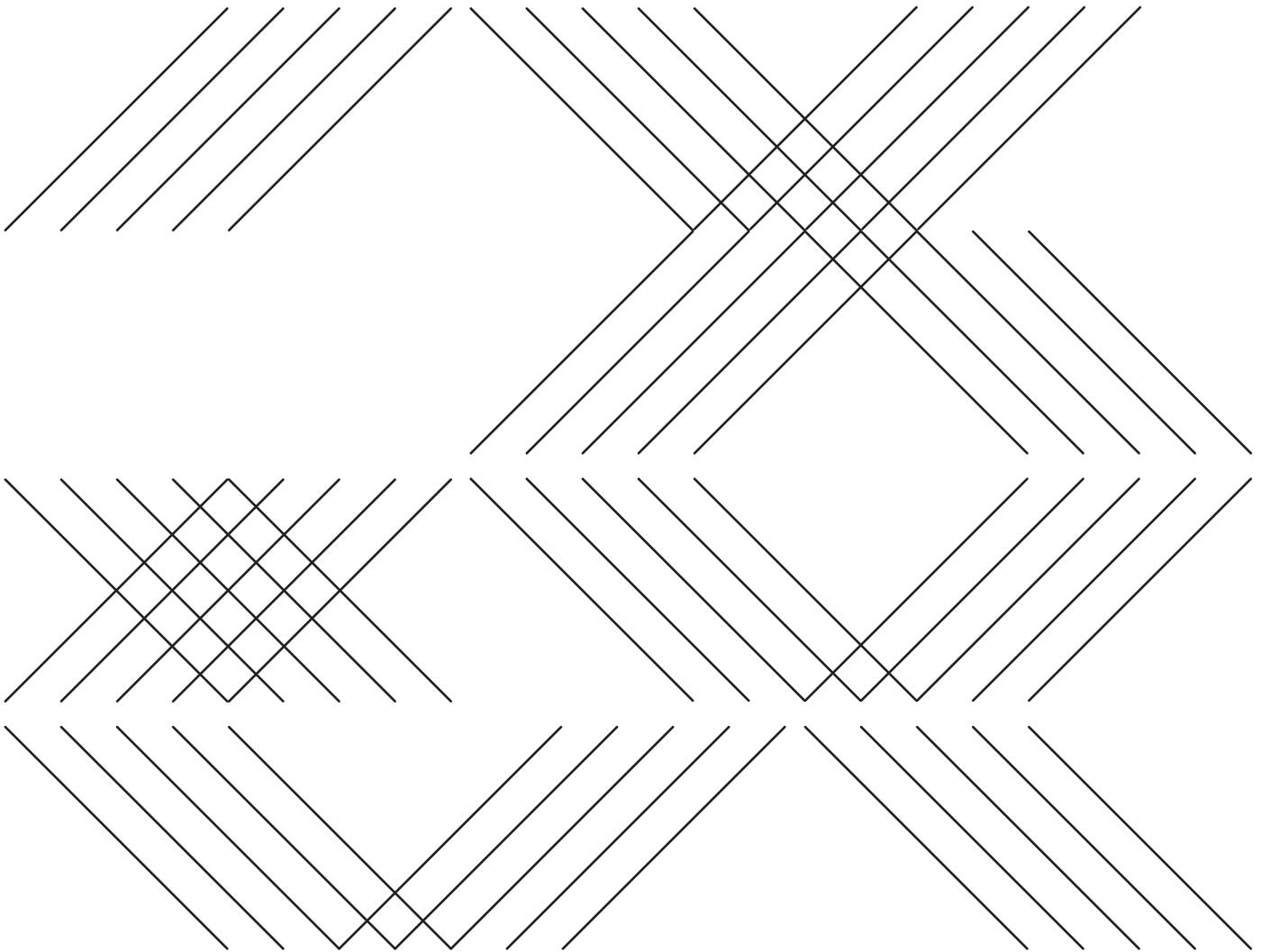
25. WHAT ROLE CAN FESTIVALS PLAY TO ENHANCE INDIGENOUS PRODUCTION OPPORTUNITIES?

Most respondents indicate that festivals can continue to provide resources to grow the industry. One respondent referred to festivals as "talent incubators" that nurture emerging talent. At the same time, other festivals noted the importance of ongoing professional development opportunities afforded by festivals, such as through panel discussions, and through master classes, creative labs and workshops for writers, directors and actors. Some noted the importance of festivals to support the financing of indigenous production, for example through pitch sessions and networking events between financiers and producers. Festivals were also said to offer dedicated space for Indigenous productions to be seen, in particular by "mainstream" industry representatives.

26. WHAT ROLE CAN FESTIVALS PLAY TO ENCOURAGE INDIGENOUS INTERNATIONAL COPRODUCTIONS?

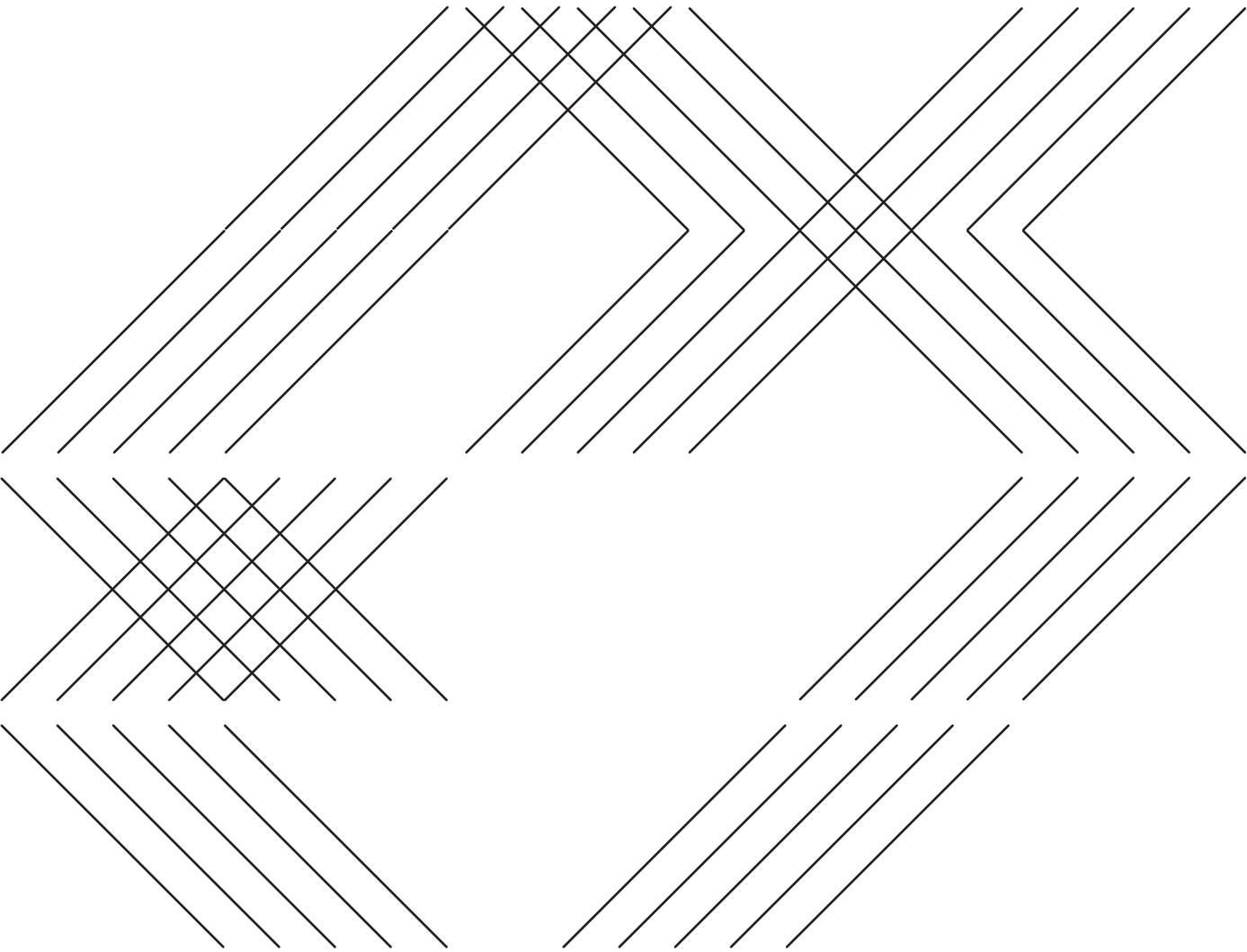
With guests from around the world, festivals are said to be natural platforms for encouraging coproductions. Most respondents are of the view that festivals can encourage Indigenous international coproductions by: prioritizing international festival invitations, hosting coproduction panels, promoting their local talent, providing networking opportunities for international attendees focused on coproduction, and by tapping into existing international partnerships. Some respondents feel that without the encouragement of festivals, coproductions for Indigenous content might not happen. One respondent noted that smaller initiatives are already taking place to bring delegations from one country to another and could be amplified. Another noted the challenge of accessing funding for coproductions. One suggestion put forward was to make current coproductions more visible, and to provide case studies of successful ventures.

3. LIST OF SURVEY RESPONDENTS



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1. American Indian Film Festival (San Francisco, California, USA)
 2. Augsburg Native American Film Series (Minneapolis, Minnesota, USA)
 3. Available Light Film Festival (Whitehorse, Yukon, CA)
 4. Berlinale/Berlin International Film Festival (Berlin, Germany, EU)
 5. Big Sky Documentary Film Festival (Missoula, Montana, USA)
 6. California's American Indian and Indigenous Film Festival (San Marcos, California, USA)
 7. Cine Las Americas International Film Festival (Austin, Texas, USA)
 8. CLACPI Festival Internacional de Cine Y Video de Los Pueblos Indígenas/International Film and Video Festival of Indigenous Peoples (Biennale in rotating Latin American countries)
 9. Environmental Film Festival in the Nation's Capital (Washington, DC, USA)
 10. Hawaii International Film Festival (Honolulu, Hawai'i, USA)
 11. Hot Docs Canadian International Documentary Festival (Toronto, Ontario, CA)
 12. imagineNATIVE Film + Media Arts Festival (Toronto, Ontario, CA)
 13. Indianer Inuit: North American Native Film Festival (Stuttgart, Germany, EU)
 14. Indigenous Film and Arts Festival (Denver, Colorado, USA)
 15. L.A. Skins Film Festival (Los Angeles, California, USA)
 16. London Short Film Festival (London, England, UK)
 17. Maoriland Film Festival (ōtaki, Aotearoa/ New Zealand)
 18. Native Spirit Festival (London, England, UK)
 19. Native American Film + Video Festival (New York, New York, USA)
 20. Border Crossings' Origins Festival (London, England, UK)
 21. Reel Canada (Toronto, Ontario, CA)
 22. Skábmagovat - Indigenous Peoples' Film Festival (Inari, Finland, EU)
 23. Solid Screen Festival (Bilinga Beach, Queensland, Australia)
 24. Sundance Film Festival (Park City, Utah, USA)
 25. Sydney International Film Festival (Sydney, Australia)
 26. Tampere International Short Film Festival (Tampere, Finland, EU)
 27. Vision Maker Film Festival (Lincoln, Nebraska, USA)
 28. Wairoa Maori Film Festival (Wairoa, Aotearoa/ New Zealand)
 29. Winda Film Festival (Sydney, Australia)
 30. Winnipeg Film Group/Cinemathèque (Winnipeg, Manitoba, CA)
 31. Festival Présence autochtone / Montreal First Peoples' Festival (Montréal, Québec, CA)
 32. Two Spirit Festival (Saskatoon, Saskatchewan, CA)

ANNEX 3: LIST OF INTERVIEWEES



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1. Cheryl Alexander, FNX
 2. Catherine Bainbridge, Rezolution Pictures
 3. John Christou, Prospector Films
 4. Valerie Creighton, Canada Media Fund
 5. Christa Dickenson, Telefilm Canada
 6. Huw Eirug, Nunavut Film Development Corporation
 7. Leanne Ferrer, Pacific Islanders in Communications
 8. Ainsley Gardiner, Whenua Films
 9. Barbara Hager, Arrow Productions
 10. Sterlin Harjo, Independent Filmmaker
 11. Monika Ille, Aboriginal Peoples' Television Network
 12. David Jowsey, Bunya Productions
 13. Tina Keeper, Kistikan Pictures
 14. Ciara Lacy, Independent Producer
 15. Michelle Latimer, Independent Filmmaker
 16. Vanessa Loewen, Animiki See
 17. Steve Loft, Canada Council for the Arts
 18. Laura Milliken, Big Soul Productions
 19. Karen O Kahurangi Waaka-Tibble, New Zealand Film Commission
 20. Linda Olszewski, ShortsTV
 21. Rachel Perkins and Darren Dale, Blackfella Films
 22. Maryanne Redpath, Berlinale NATIVE
 23. Bird Runningwater, Native American & Indigenous Program, Sundance
 24. Ian Skorodin, LA Skins Film Festival
 25. Penny Smallacombe, Screen Australia
 26. Shirley Sneve, Vision Maker Media
 27. Anne Lajla Utsi, International Sami Film Institute
 28. Michelle van Beusekom, National Film Board of Canada
 29. Elizabeth Weatherford, National Museum of the American Indian
 30. Chelsea Winstanley, Independent Producer
 31. Jonas Woost, Telus Storyhive