Profile and Value Chain Analysis: Ontario Comedy Content Creators

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CANCOM
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Prepared by:

Nordicity

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Executive Summary

This project, led by The Foundation for Canadian Comedy (CANCOM)[1], is intended to support Ontario-based comedy content creators with insights and analysis of the collective challenges and opportunities they face. The scope of research examines, in particular, comedy content creators working in produced media looking to grow their careers from Ontario.

The resulting analysis should motivate stronger collaboration across the sector and strengthen CANCOM's discussions with other stakeholders. It supports the organization in setting priorities for the support of comedy artists and ideally will be valuable to a range of sector participants. The aim of this project is not to generate recommendations per se, but to provide business intelligence and share the knowledge gathered to identify opportunities to develop and support comedic talent, and retain comedy content creators in Ontario.

COVID-19 Impact

Not long after the project kicked-off, the world was thrust into a global pandemic. The COVID-19 virus has led to major upheaval across all sectors but particularly for comedy, as it relies on live performance and audience gatherings. This study is not a report on the comedy sector's response to COVID-19 but does aim to address the impacts of COVID-19 where possible.

Definitions, Approach and Methodology

For the purposes of this study, a **comedy content creator** can be defined as an individual who creates, writes and/or performs comedy on any platform, particularly those for whom creating revenue-generating intellectual property (IP) that is distributed via produced media is the main goal. This definition includes: Stand-up comedians, sketch comedy and improvisational comedy writers, online comedy creators, and independent comedy producers or presenters with a specific focus on creating content in the comedy IP value chain. Recognizing that many comedy content creators supplement their core comedy-related income with income from other sources, to participate in this study, comedy content creators did not have to be earning a living solely through comedy.

Throughout this study the term **produced media** is used to define all screen and/or audio comedic content including, but not limited to, film, television shows, stand-up specials, digital/web series, content exclusive to streaming services, comedy albums, and podcasts. For comedy, as with music and select other cultural industries, live performance is often the original source for what can become downstream revenue in produced media.

The data collection for this research consisted of 1) Literature Scan; 2) Survey to comedy content creators (individuals and production companies); and 3) Key stakeholder interviews. The survey to comedy content creators earned **540 usable individual responses and 24 company responses**. With such a strong sample size for individuals, we can assume that this survey is sufficiently representative of the broader universe of comedy content creators in Ontario. Interviews with **10 key stakeholders** included comedy content creators, producers, broadcasters and performance venues.

[1] The Foundation for Canadian Comedy bolsters the creation of Canadian comedy intellectual property (IP) for presentation and distribution in Canada and the global digital media market.

Nordicity

Profile of Independent Comedy Content Creators: Demographics & Income

The typical Ontario comedy content creator is: experienced; educated; likely living in or around Toronto (73%), in their late 30s or early 40s, very likely to be white (approximately 80%) but only a little more likely to identify as a man (60%) than as a woman (40%).

Most comedy content creators would describe themselves as primarily Live or Stage Performers (66%). Indeed, performing live was one of the most significant contributors to comedy-related income for 62% of respondents. Produced media revenue eluded many respondents. Just a third of respondents (36%) indicated that acting/hosting for produced media was a significant contributor to their comedy-related income and writing was a top revenue source for just 14% of respondents.

Overall, the majority (75%) of creators are earning less than $24,500 per year from comedy content creation, and on average total annual income from comedy over the past year was just $18,900. In this context, many have second jobs that, in some cases, account for the majority of their earnings.

The Challenges and Opportunities Facing Comedy Content Creators

The core objective of this study is to shed light on the challenges facing Ontario-based comedy content creators.

Factors for Career Growth and Ability to Make a Living

Through the survey, barriers and opportunities were identified from two perspectives: one, what issues were felt to be critically limiting or supporting comedy content creators' **career growth or success** in produced media; two, what factors were hindering their ability to **make a living** from their work. These distinctions were made so as to assess whether the sector requires different approaches to supporting career advancement vs. monetizing content.

The top three barriers felt by respondents to be <u>limiting comedy content creators' success</u>, and conversely the top three opportunities for <u>future career success</u> are presented in the table below:

Table 1: Top 3 barriers to growth and success in overall comedy career	% of Respondents
Lack of public investment or support from government	55%
Lack of high profile/paying gigs at comedy festivals, clubs and venues	53%
Pressure to accept low pay	43%

n=485
Source: Nordicity Survey to Comedy Content Creators 2020

The top three most realistic opportunities for <u>future career success overall</u>, selected by almost half of respondents or more, were:

Table 2: Top 3 opportunities for respondents' overall future success in comedy	Share % of Respondents
Stronger networking and/or access to stakeholders (producers, bookers, agents etc.)	59%
Increased pay for performing/writing comedy	48%
Direct access to government funding/grants/incentives	47%

n=470
Source: Nordicity Survey to Comedy Content Creators 2020

The top three barriers felt to be limiting comedy content creators' ability to <u>make a living from produced media</u>, selected by almost half of respondents or more, were:

Table 3: Top 3 barriers to making a living in produced media	% of Respondents
Lack of opportunities to perform/write for produced media	56%
Low investment from Film/TV production of ON/CA comedy content	51%
Lack of promotion or "star system" for ON/CA comedians	46%

n=476
Source: Nordicity Survey to Comedy Content Creators 2020

The top three opportunities for monetizing or earning a living from produced media in comedy, were:

Table 4: Top 3 opportunities for respondents' ability to make a living in produced media	Share (%)
Increased government funding to help create more ON/CA comedy content	50%
Increased pay for performing/writing comedy content	44%
A stronger "star system" to promote/profile comedians from ON/CA	42%

n=464
Source: Nordicity Survey to Comedy Content Creators 2020

Barriers, Opportunities and Value Chain

Building on the survey results and interviews, Nordicity observed the following core set of barriers and opportunities that exist in the comedy content creation eco-system in Ontario (See Section 3), these are:

1. **Access to public support and appropriate remuneration**– seeking recognition for the comedy content creator as an artist and access to fair pay.
2. **Access to showcase opportunities including celebrating comedy content creators**– recognizing the impacts of media consolidation, declining demand for comedy content from established stakeholders and intense competition for the opportunities that do exist. Encouraging the discoverability and celebration of Ontario's comedic talent.
3. **Addressing discrimination and challenges stemming from a lack of diversity –** confronting the systemic racism and discrimination embedded in the broad Canadian media landscape and supporting meaningful opportunities for historically marginalized creators.
4. **Access to international markets –** resolving the challenges creators face with regard to living and working from Canada while pursuing international opportunities to advance their careers and profiles.
5. **Access to supportive networks –** nurturing the networking and skills development access for emerging and mid-career comedy content creators.
6. **Access to digital opportunities and digital distribution –** supporting the ability of comedy content creators to thrive online including greater awareness of discoverability and monetization opportunities.

These gaps are contributing factors to the loss of opportunities to develop comedic talent and content, and job retention.

Through consultations, it was evident that the comedy content creator career path is filled with setbacks and successes alongside plenty of risks to bear on the part of the creators. Success in produced media comedy (for both individual creators and companies) was described as a series of "small incremental steps" towards the ultimate goal of a lead role in a produced media series, or the renewal of a series. Success in comedy, however, cannot be measured conventionally, in a linear arc.

Certain critical milestones were cited as representing momentum toward a more sustainable career in comedy content creation, the main one being the moment when a creator is earning more revenue from comedy content creation than other work activities.

Interviewees and survey respondents pointed frequently to the similarities between a comedy content creator's journey and that of a musician's, and similarly, between comedy content and musical content. By mapping key milestones in the comedy content creators career journey and examining the roles and activities present in the film, television and music content value chains, Nordicity was able to outline a value chain for comedy content on produced media. The map below which details activities, players and stakeholders and, also positions the barriers outlined above against the phase in which they create the greatest challenge.

Figure 1 Comedy Content for Produced Media Value Chain

PHASE	1. Creation/ Ideation	2. Production	3. Circulation /Distribution	4. Delivery Mechanism	5. Audience Reception
ACTIVITIES	Material development, self-financing, social media, demo/showcase reels, clubs, festivals, podcasts, touring, awards, hosting/emceeing, acting gigs, guest appearances	Meetings with production companies or comedy recording companies, meeting with broadcasters, pitching, negotiation, casting, writing, editing, filming, recording (albums or podcasts), post-production editing/refining	Meeting with distributors and/or broadcasters, marketing domestically and internationally, promotion, positioning, selling	Consumption via: streaming platforms, linear TV, digital platform, film circuits/festivals, radio, satellite radio, podcast app/platform	Social media buzz/shares, media attention/interviews, trade commentary, critical acclaim, awards
PLAYERS	Agents/managers, bookers, peers/colleagues, festivals, comedy clubs	Producers/production companies, writers, directors, broadcasters, record label	Distributors (domestic or foreign), marketers, broadcasters/streaming platforms, producers	Broadcasters, streaming platforms, audio platforms, etc.	Critics, fans, festivals, journalists, viewers
BARRIERS	Lack of Access to Public Support Lack of Showcase Opportunities Discrimination and Lack of Diversity Lack of Supportive Networks Lack of Appropriate Renumeration Lack of Star System Lack of Star System Lack of Access to International Markets Lack of Access to Digital Opportunities				
STAKEHOLDERS	Second City, Yuk Yuk's, Absolute Comedy, Comedy Bar, TOsketchfest, Just For Laughs, etc.	Project 10 Productions, CBC, Bell Media, Netflix, Accent Entertainment, Just For Laughs, Comedy Records, etc.	CBC, Bell Media, Entertainment One, Netflix, Mongrel Media, Corus, Just For Laughs, Sirius XM, etc.	CBC Gem, Crave, Sirius XM, Netflix, Instagram, YouTube, Facebook, Apple Music, Apple Podcasts, Spotify, etc.	Local/national media outlets (e.g. etalk, Toronto Star, blogTO, NOW Magazine), international media outlets, social media, etc.

Conclusion

This report is being assembled just as the cast of *Schitt's Creek* swept the Emmy awards. How can the next wave of comedy content creators be supported to achieve the same levels of success? From the perspective of the industry and its participants, a few key opportunities for change are:

- greater safety and public financial support for the creators in their precarious early career stages;
- greater support for exporting to/accessing international markets;
- more opportunities to celebrate Ontario-based creators; and
- leveraging the comedy content creators' strengths in digital content creation and distribution.

The strong survey participation, with more than 500 completed responses across Ontario, demonstrates in part the openness and appetite of the comedy content creator sector to be part of a larger, more formal and supportive community.

Enhancing the comedy content creator network with greater access to support, to training and to career development could create benefits across the arts and creative industries eco-systems, for example, as stronger content reaches film and television development stages. Interviewees recognize the demand for more diverse content and stories on screen, but to get there, those creators must be supported with meaningful career pathways and storytelling opportunities earlier in their careers.

Critical to the success of Ontario comedy content creators is access to resources to create content and get traction with audiences on the global digital media market. Limited spaces to perform and showcase, and limited opportunities to get into development and production of produced media, make it challenging for comedy content creators to work and remain at home. These barriers may result in Ontario not being as competitive as it could be for generating revenue from the global digital media market for comedy.

The profile, developed under CANCOM's leadership, provides a series of indicators from income to barriers that can act as a foundation to be built upon, in the coming years and through the industry's COVID-19 recovery.

1. Introduction

This section introduces the objectives, approach and methodology for *Profile and Value Chain Analysis – Ontario Comedy Content Creators.* It describes a profile of the survey respondents and introduces some important considerations for readers.

1.1 Background and Objectives

This project, led by The Foundation for Canadian Comedy (CANCOM), is intended to support Ontario-based comedy content creators with insights and analysis of the collective challenges and opportunities they face in the context of creating produced media and being able to remain in Ontario. The results of this profile will provide a data foundation to support the growth of Canadian comedy creators (writers, performers and producers) and identify factors for leaving the sector and/or the country, as well as opportunities to retain them. This research helps to fill information gaps, clarifying areas of misinformation and providing a baseline for ongoing measurement.

Project Objectives

The resulting analysis should also serve to:

- **Motivate** stronger collaboration across the sector
- **Strengthen** CANCOM's discussions with funders and stakeholders
- **Assist** CANCOM's own priority-setting efforts by shedding light on the opportunities for action to support the sector.
- **Fuel** CANCOM's strategic planning, program and service development and ideally be valuable for a wide range of comedy sector stakeholders, including content creators themselves

The aim of this project is not to generate recommendations for any stakeholders but provide business intelligence and knowledge to support initiatives to strengthen the sector.

COVID-19 Impact

Not long after the project kicked-off, the world was thrust into a global pandemic. The COVID-19 virus has led to major upheaval across all sectors. Sectors connected to live performance and audience gatherings, as comedy is, were hit hard immediately and continually as the months go on. This study is not a report on the comedy sector's response to COVID-19. We have aimed to address the impact of COVID-19 where possible, despite the situation in Ontario changing constantly throughout the life of the study. To do so, the project team introduced questions into the survey questionnaire and the interview guide to gain insight into coping strategies, innovations and supports that have helped comedy content creators weather the pandemic.

About CANCOM

The Foundation for Canadian Comedy (CANCOM) bolsters the creation of Canadian comedy intellectual property (IP) for presentation and distribution in Canada and the global digital media market.

1.2 Approach and Methodology

For the purposes of this study, a **comedy content creator** can be defined as an individual who creates, writes and/or performs comedy on any platform, with particular emphasis on those for whom creating revenue-generating intellectual property (IP) distributed via produced media is the main goal. This definition includes:

- Stand-up comedians, sketch comedy performers/writers, improvisational performers and comedy writers performing live or for produced media (including traditional and digital media/streaming platforms)
- Online comedy creators creating original content distributed and consumed on social media platforms such as Instagram, TikTok, Twitter, and Snapchat.
- Independent comedy producers or presenters with a specific focus on creating content in the comedy IP value chain.

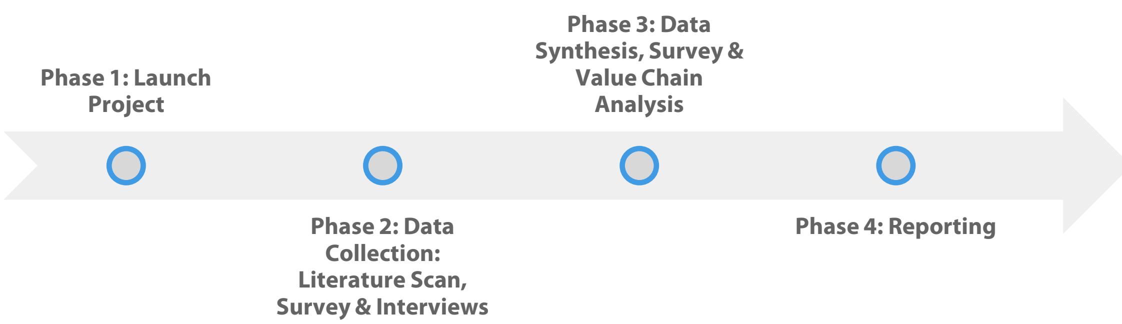
Within the roles described above, it is important to recognize that many comedy content creators supplement any/all comedy-related income with income from other work. For some that means supporting their core comedy work (e.g., performing, writing) with other comedy-related work (e.g., corporate events, teaching), for others it means working other part or full-time jobs entirely outside the industry. To participate in this study, comedy content creators did not have to be earning a living solely through comedy content creation.

Throughout this study the term **produced media** is used to define all screen and/or audio comedic content including, but not limited to, film, television shows, stand-up specials, digital/web series, content exclusive to streaming services, comedy albums and podcasts. For comedy, as with music and select other cultural industries, live performance is often the original source for what can become downstream revenue in produced media. Indeed, comedy performances are recognized by the City of Toronto as part of the cultural activities driving the city's thriving nighttime economy alongside live music and theatre.[2]

This study is primarily focused on Ontario-based comedy content creators, however, there are frequent references to the broader Canadian context. This is because, comedy content creators surveyed and interviewed, while Ontario-based, were drawing on the experiences of their careers, which extend across Canada and beyond.

The work plan overview is shown in Figure 2 below:

Figure 2: Work Plan Overview



Data Collection in Phase 2 consisted of: 1) Literature Scan; 2) Survey to comedy content creators (individuals and production companies); 3) Key stakeholder interviews.

[2] City of Toronto, *Toronto Nightlife Action Plan* (2019) https://www.toronto.ca/legdocs/mmis/2019/ec/bgrd/backgroundfile-134955.pdf

Literature Scan

The secondary research primarily focused on:

- The current working state for comedic content creators provincially, nationally and internationally
- The value chain for comedy content creators (vs. other creative industries)
- Identifying preliminary issues, barriers and challenges

Given that this is an under researched subject and discipline, Nordicity anticipated that there would not be much in the way of industry research to leverage. Newspaper articles, industry news, podcast interviews and documentaries provided the background to inform the survey and interview questionnaires.

Survey

The Profile of Comedy Content Creators survey was launched June 17, 2020 and remained in the field for approximately four weeks. The survey encouraged responses from:

- Individuals creating comedy content - including writers, performers, and social media creators.
- Independent Production Companies with a particular focus on comedy content (including record labels).

The survey was launched with an email to Canadian Association of Stand-up Comedians' (CASC) membership as well as to 12,000 subscribers to ACTRA-Toronto's email list. The survey was also promoted on Facebook, Twitter and Instagram both through official CASC, CANCOM and Nordicity accounts and within comedy groups and fan pages online. The survey earned some **540 usable individual responses and 24 company responses**. With such a strong sample size for individuals, we can assume that this survey is sufficiently representative of the broader universe of individual comedy content creators in Ontario.

Key Stakeholder Interviews

The online survey was complemented by **10 key stakeholder interviews**. Where the online survey served to capture the perspective of comedy content writers, performers, and independent producers, the interviews helped the team understand the perspective of other components of the comedy content value chain, for example, producers, broadcasters, digital creators, live performance and so on. Those interviewed include:

- Vance Banzo and Guled Abdi, Stars of CBC's *TallBoyz* and comedians (jointly provided written interview responses)
- Andrew Barnsley, CEO, Project 10 Productions
- Sandra Battaglini, President and co-founder of CASC and comedian
- Trevor Boris, Comedian and executive producer
- Mark Breslin, CEO, Yuk Yuk's
- Michelle Daly, Senior Director, Comedy, CBC
- Sarah Fowlie, Director, Independent Production – Comedy, Bell Media
- Don Kelly, Comedian
- Brandon Ash Mohammed, Comedian

- Stewart Reynolds (a.k.a. Brittlestar), Comedian

Interview topics included:

- Typical career trajectory of a comedian or comedy content creator in Canada, including critical milestones
- How comedic produced media is developed and created
- Barriers and frustrations faced by the industry as well as opportunities for growth

Data Synthesis and Value Chain Analysis

The project team synthesized findings from the online survey, interviews and available secondary research. The results formed a profile of comedy content creators in Ontario and a narrative of the comedy content creators' career arc in Ontario including their challenges, priorities and opportunities for success.

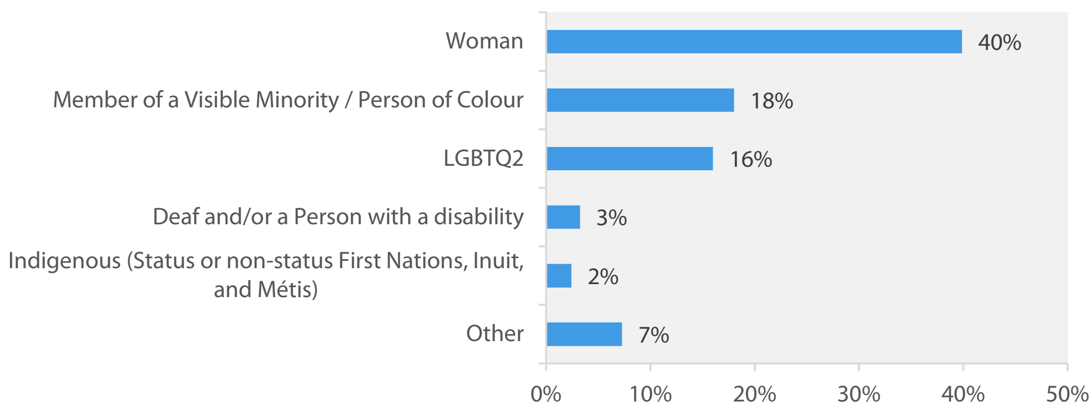
2. Profile of Individual Comedy Content Creators

This section details the comedy content creators in terms of demographics, primary role in comedy content creation and sources of income. This section is based primarily on survey responses. Where appropriate, this section contextualizes the comedy content creator demographics within the broader culture sector's workforce by comparing survey findings with Nordicity's custom data tabulations of Statistics Canada's 2016 Census of Population for the 2018 study, by WorkInCulture, *MakingItWork: Pathways Towards Sustainable Cultural Career* ("MakingItWork").[3]

2.1 Comedy Content Creator Demographics

The chart below shows the share of survey respondents that self-identified with equity-seeking or historically marginalized groups. Responses do not sum to 100 because respondents could, of course, select multiple options.

Figure 3: Comedy content creators identifying with equity-seeking/historically marginalized groups



n=494
Source: Nordicity Survey to Comedy Content Creators 2020

- Four out of ten (40%) comedy content creators identified as women. This share lags, very slightly, behind the proportion of culture sector works in Ontario that identify as women (44%).[4]
- Nearly two in ten (18%) of comedy content creators identified as members of visible minorities or as a person of colour. This share more markedly lags than the percentage of visible minorities working in Ontario's overall culture sector (26%).[5]

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[3] *MakingItWork: Pathways Toward Sustainable Cultural Careers* ("MakingItWork"), examined roles and occupations across the full range of Ontario's cultural sector – that is to say Arts, Cultural Industries, Libraries, Museums and Heritage.

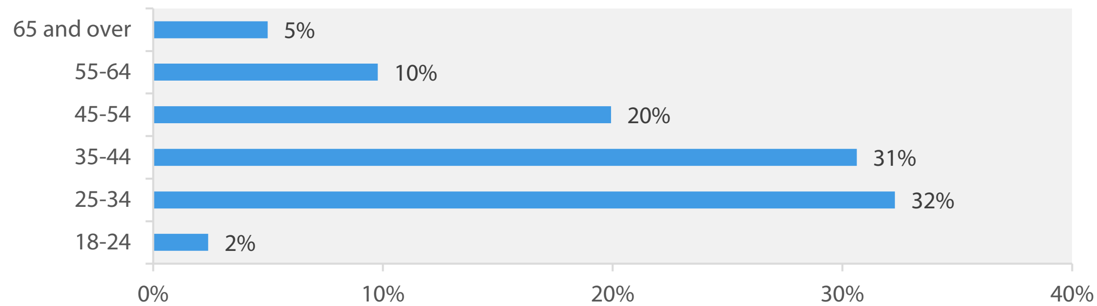
[4] MakingItWork, p. 34

[5] MakingItWork, p. 38

- Approximately 2% of respondents identified as Indigenous. This share more closely aligns with the share of Indigenous participation observed in the overall Ontario workforce (2.3%) and exceeds that of the broader cultural sector (1.3%).[6]
- Other answers from respondents included those who identified as newcomers to Canada, as well as those who mentioned their religious background. Additionally, several respondents who selected the other option chose not to elaborate.

The next chart, below, depicts the age distribution of survey respondents.

Figure 4: Comedy content creators by age

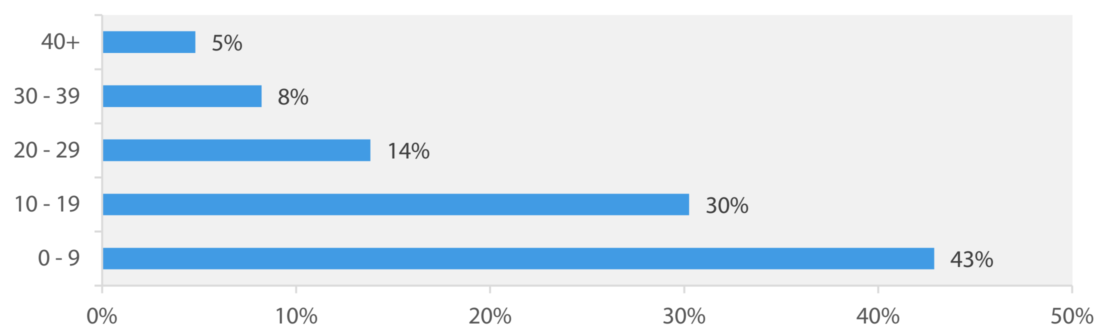


n=542
Source: Nordicity Survey to Comedy Content Creators 2020

- While the largest share of survey respondents indicated that they were between the ages of 25 and 34 (32%), the average age of survey respondents was higher, at 41 years old. This average is nearly identical to the average age of the broader culture sector worker (41.5 years old).[7]
- The smallest share of respondents – just 2% - were between 18 and 24 years old.

The chart below presents the distribution of survey respondents by the number of years they have been creating comedy content.

Figure 5: Comedy content creators by number of years working in comedy



n=499
Source: Nordicity Survey to Comedy Content Creators 2020

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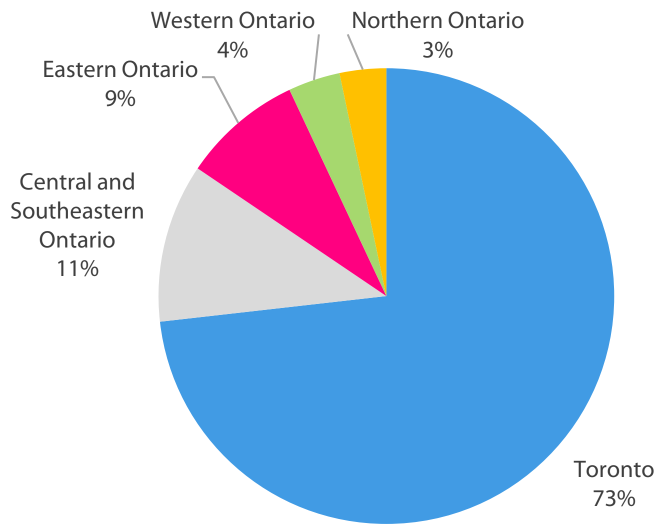
[6] MakingItWork, p. 40

[7] MakingItWork, p. 33

- While the largest share of survey respondents indicated that they have been working in comedy for up to nine years (43%), the average number of years working in comedy was higher, at 14 years.
- To compare roughly with the age of respondent, it would appear the average comedy content creator in Ontario 41 years old, with 14 years of experience.

The chart below indicates where in Ontario survey respondents currently reside.

Figure 6: Ontario-based comedy content creators by geography



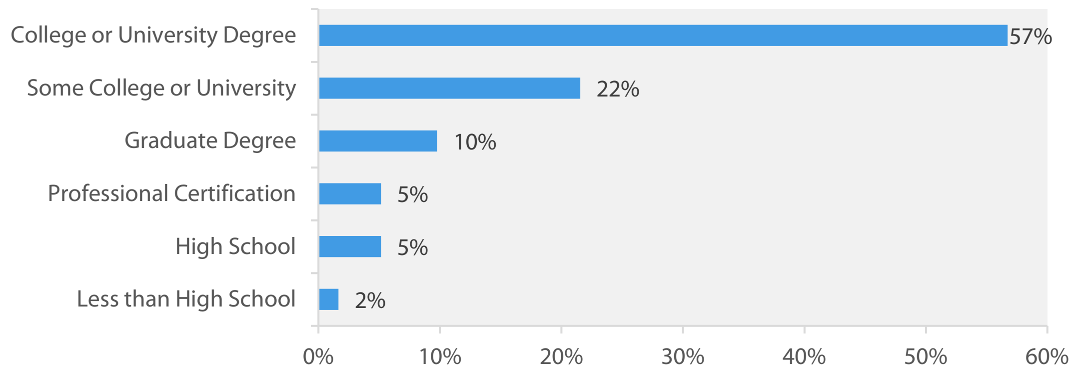
n=515
Source: Nordicity Survey to Comedy Content Creators 2020

- The vast majority of comedy content creators, some 73%, reside in Toronto.[8]
- Among the 11% of respondents who reside in Central and Southeastern Ontario, the majority live in Hamilton, Richmond Hill, Markham, Brampton, and Oakville.
- Nearly one in ten (9%) of respondents reside in Eastern Ontario, mostly in Ottawa.
- The 4% of respondents from Western Ontario, mainly live in London, Guelph, and Kitchener.
- The 3% of respondents from Northern Ontario, mainly live in Sudbury and Thunder Bay.

Survey respondents were asked to identify the highest level of education they have received. The chart below details those findings.

[8] Census Subdivision representing the City of Toronto

Figure 7: Comedy content creators by highest educational attainment



n=543
Source: Nordicity Survey to Comedy Content Creators 2020

- Overall, the comedy content creator sector is highly educated, with 89% having completed at least *some* college, university or graduate education. This percentage is slightly higher than the cultural sector workforce in Ontario, 81% of which hold at least some kind of post-secondary credentials.[9]

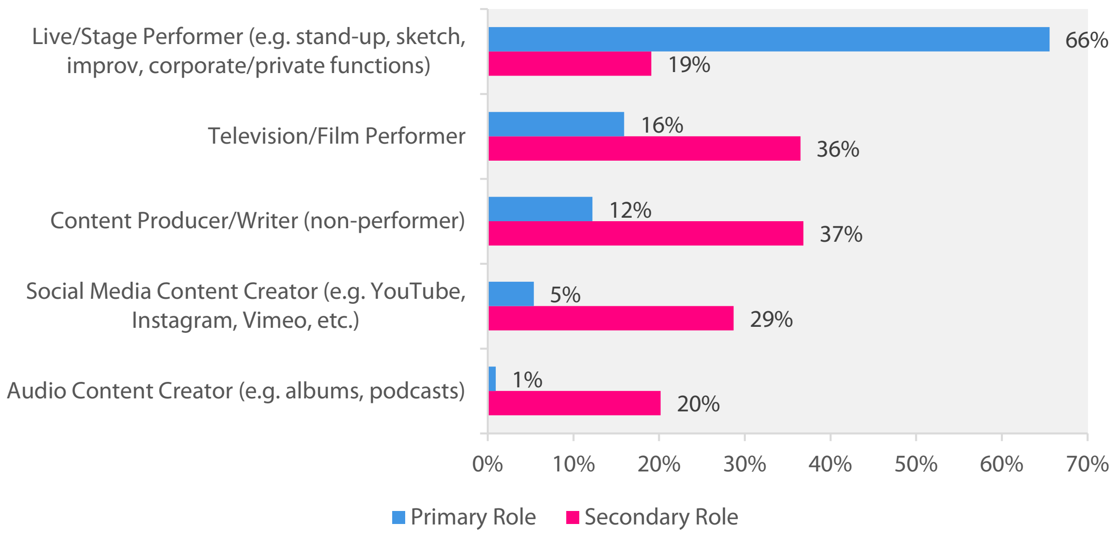
2.2 Roles, Income and Income Sources

This subsection provides an understanding of how comedy content creators define themselves and earn a living. For context, it is important to recognize that a longtime hallmark of the comedy content creator (as with many artists) is the necessity to embrace many roles on the path to earning a living from one's passion. Indeed, there are many components to the basket of earnings for any comedy content creator. Even highly successful creators with several television and other credits will likely draw on a blend of revenue sources. The range could include live performance, appearances in produced media, writing, teaching, side gigs in produced media but unrelated to comedy, and on and on. Many will still need to work a non-comedy-related day job in order to make a living wage.

The survey respondents were asked to identify their primary role as a comedy content creator, i.e. the title that best described their career focus and *primary* activities. As many in the comedy industry work across many disciplines and platforms, respondents were additionally asked to select a *secondary* role that has a significant impact on their career in addition to their primary role. The chart below provides a snapshot of how those individual respondents identify their primary and secondary roles in comedy content creation.

[9] MakingItWork, p. 35

Figure 8: Comedy content creators by primary and secondary roles



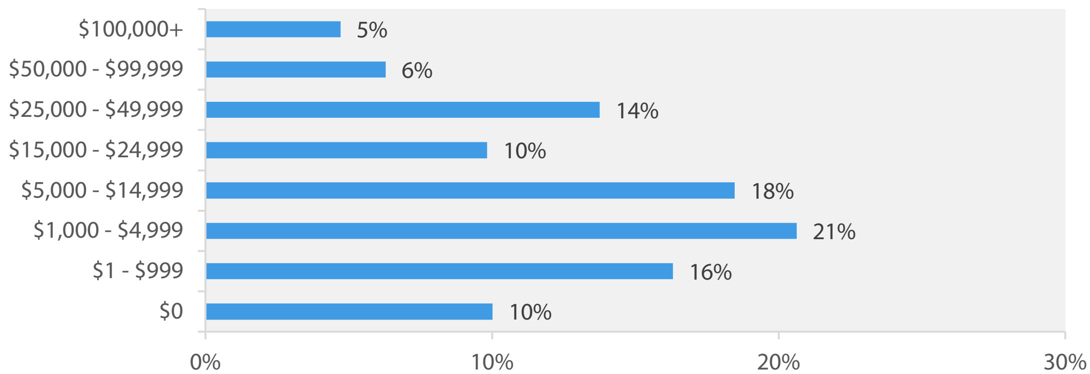
n=540
Source: Nordicity Survey to Comedy Content Creators 2020

- The largest portion of survey respondents, some 66% or two-thirds, describe themselves as primarily **Live or Stage Performers**.
- A third of respondents (32%) describe themselves as comedy content creators *primarily* involved in some manner of **produced media**.[10] A full 85% of respondents described themselves as *secondarily* involved in produced media.
- For the 12% of respondents that describe themselves primarily as **writers and content producers (non-performers)**, the assumption would be that that includes a blend of both live performance and produced media.

The chart below shows the distribution of comedy-related income among survey respondents.

[10] **Produced media** is used to define all screen and/or audio comedic content including, but not limited to, film, television shows, stand-up specials, digital/web series, content exclusive to streaming services, comedy albums, and podcasts.

Figure 9: Comedy content creators by comedy-related income range



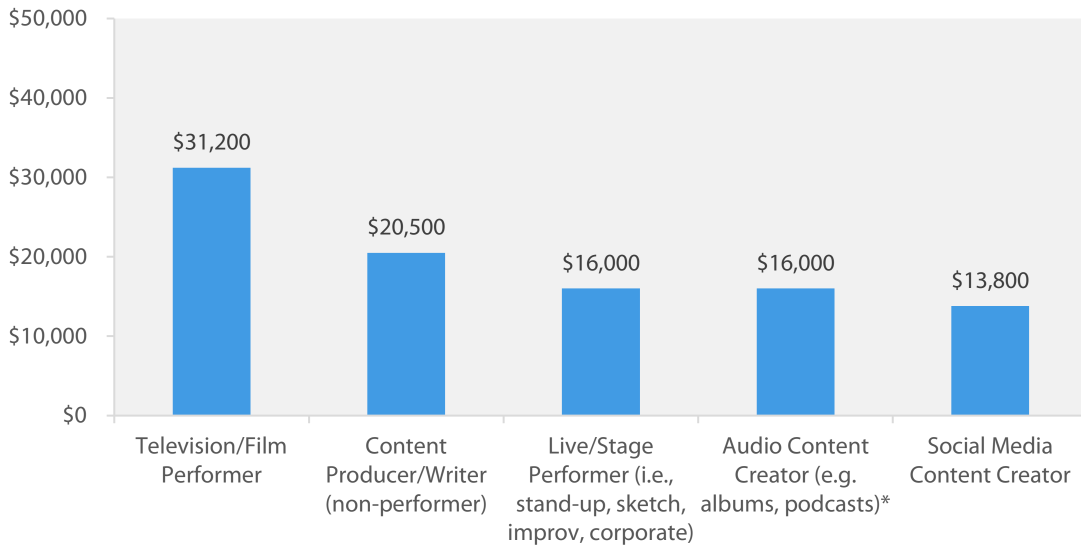
n=509
Source: Nordicity Survey to Comedy Content Creators 2020

- The vast majority, some 75%, of comedy content creators indicated they earned between $0 and **$24,500** from their comedy-related income in 2019. The average total annual income from comedy over the past year was just **$18,900**.
- Only **5%** of the survey sample, roughly 25 respondents, reported earning over $100,000 from comedy over the past year.
- On average, respondents' comedy-related earnings comprised 35% of their total income – meaning many are still reliant on other sources of income.
- When examined by location, comedy content creators who live within the GTA[11] make an average comedy income of **$18,910**, significantly higher than their non-GTA counterparts who earned, on average, **$10,534** from comedy over the past year.
- On average, Ontario-based comedy content creators earned 89% of their comedy-related income from work opportunities within Canada. International revenue accounted for approximately 11% of comedy-related income.

The table below details the average comedy-related income by the primary roles identified by respondents.

[11] GTA (Greater Toronto Area) as referenced in this report includes Halton (Oakville, Milton, Burlington, and Halton Hills), Peel (Caledon, Brampton and Mississauga), City of Toronto, York (King, Vaughan, East Gwillimbury, Whitchurch-Stouffville, Markham, Newmarket, Aurora and Richmond Hill), and Durham (Brock, Uxbridge, Scugog, Pickering, Ajax, Whitby, Oshawa and Clarington).

Figure 10: Average comedy-related income by primary role



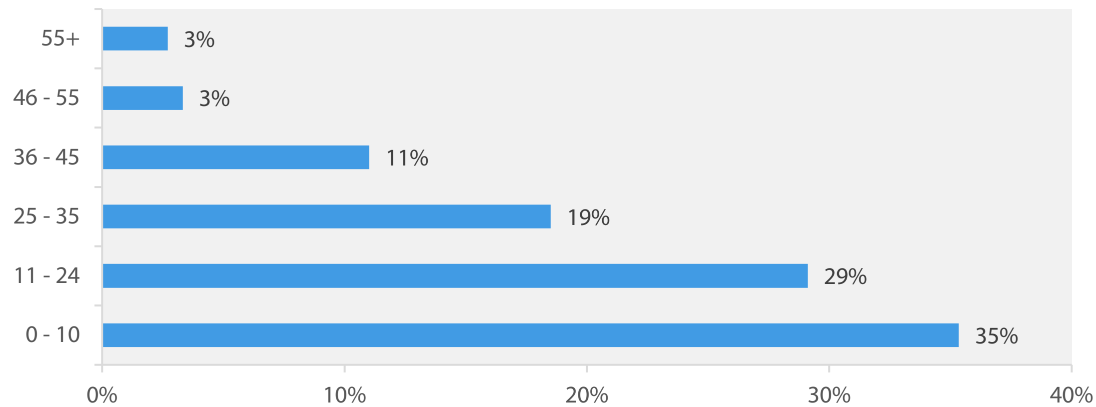
n=509
*Audio Content Creator average drawn from a sample of <10
Source: Nordicity Survey to Comedy Content Creators 2020

- The rewards of produced media are evident as television and film performers in comedy generated the highest incomes, with an average of $31,200 earned in 2019. This is followed by content producer/writers who earned, on average $20,500 from comedy. Those who identify primarily as live/stage performers and audio content creators earned even less, roughly $16,000, from their work in comedy.
- Earning the lowest from their comedy income, were social media content creators who made an average of $13,800.

Survey respondents were asked to estimate the number of hours per week that they spend working on comedy. They were asked to include time spent performing, writing, rehearsing, workshopping, etc. and not to limit to paid hours. Necessary to a comedian in Ontario's success is their ability to self-produce their own content (e.g. social media postings, comedy albums, web series, etc.) and create their own opportunities (e.g. hosting their own shows, organizing festivals, etc.) much of which may be unpaid. As noted previously, many comedy content creators are simultaneously working part-time or full-time in addition to attempting to make a career in comedy.[12] The results are presented in the chart below.

[12] "Day Jobs - Next Up - Episode 3." *CBC Comedy* (November 19, 2019). https://www.cbc.ca/comedy/what-if-you-need-a-day-job-while-pursuing-comedy-1.5339402

Figure 11: Number of hours content creators devoted to comedy per week by share of respondents



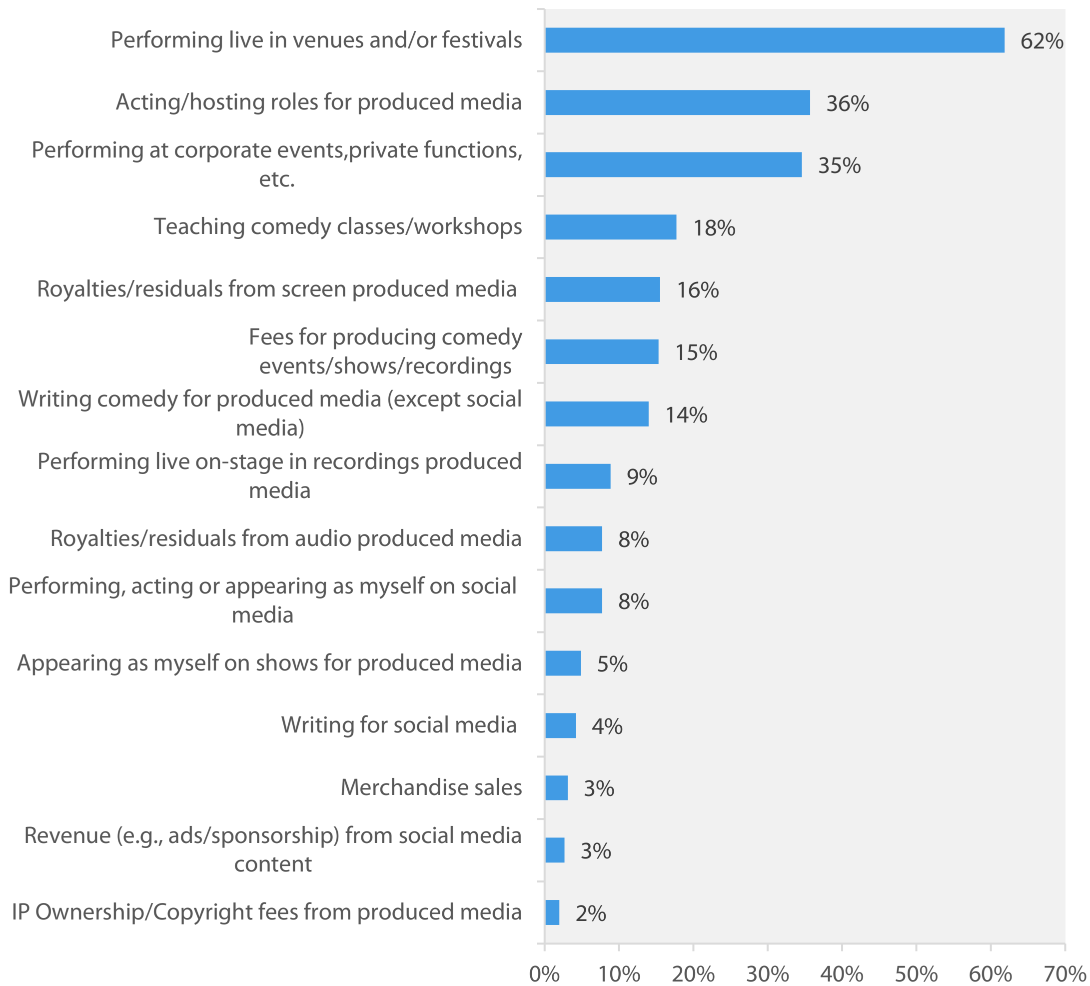
n=481
Source: Nordicity Survey to Comedy Content Creators 2020

- The highest share of respondents, 35%, reported spending the *least* amount of time working on comedy content creation per week – that is to say up to ten hours. Presumably, this share might also align with the share of respondents working a full-time day job. One could imagine that these respondents would devote more hours weekly to comedy given the opportunity.
- Roughly 17% of respondents estimated that they worked over 36 hours a week – closer to a typical full-time job - on their comedy.
- On average respondents spent **20 hours** per week working on comedy content creation (e.g. rehearsal time, writing, workshopping content, performing etc.) [13] Of those hours, an average of **five hours** were for paid opportunities (25%).
- Based on that average 20-hour work week (roughly part-time) the average comedy income per hour was **$25/hr**. For context, this hourly wage may be drawn higher by the higher earning respondents working in produced media (television/film performers and writers) with higher average rates. The average here may not align with what live performers would generally associate with an overall average hourly wage/income as will be discussed in Subsection 3.2.1.

Survey respondents were asked to select a maximum of three revenue streams that represented the most significant contributions to their comedy-related income in a typical year.

[13] Limited to 60 hours/week

Figure 12: Revenue streams selected as one of top three sources of income by % of respondents



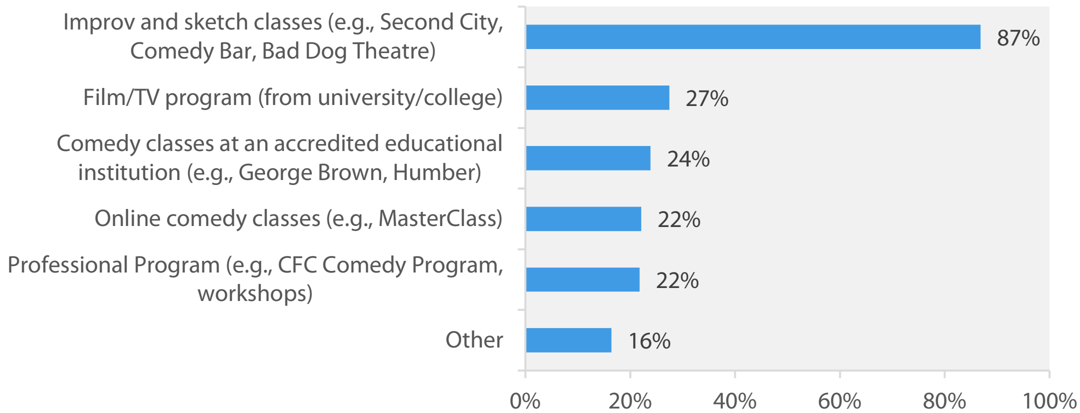
n=451
Source: Nordicity Survey to Comedy Content Creators 2020

- Performing live on-stage in comedy venues, festivals and events was one of the most significant contributors to comedy-related income for 62% of respondents.
- Roughly a third of respondents indicated that acting/hosting for produced media was a significant contributor to their comedy-related income (36%), tied closely with performing at live corporate and private events (35%).
- Notably, writing, a crucial activity that permeates all facets of comedy, was selected as a top revenue source for just 14% of respondents.
- Among this sample, royalties, IP ownership, merchandise sales were rarely selected by respondents as among their top three income sources.
- Not mentioned in the selection here, but raised through the literature search and interviews, was the growing use of crowdfunding and patron-funding platforms such as Patreon, to sustainably fund more content creation, share exclusive content and develop fanbases online.

2.3 Industry Support and Training

This subsection provides an overview of the sector as far as its access to industry support and training. Comedy content creators, and particularly those involved in improvisation, are continually learning and honing their skills. The majority (73%) of survey respondents have taken part in some kind of comedy-specific training. The chart below breaks down the types of training taken by respondents.

Figure 13: Comedy-specific training experience

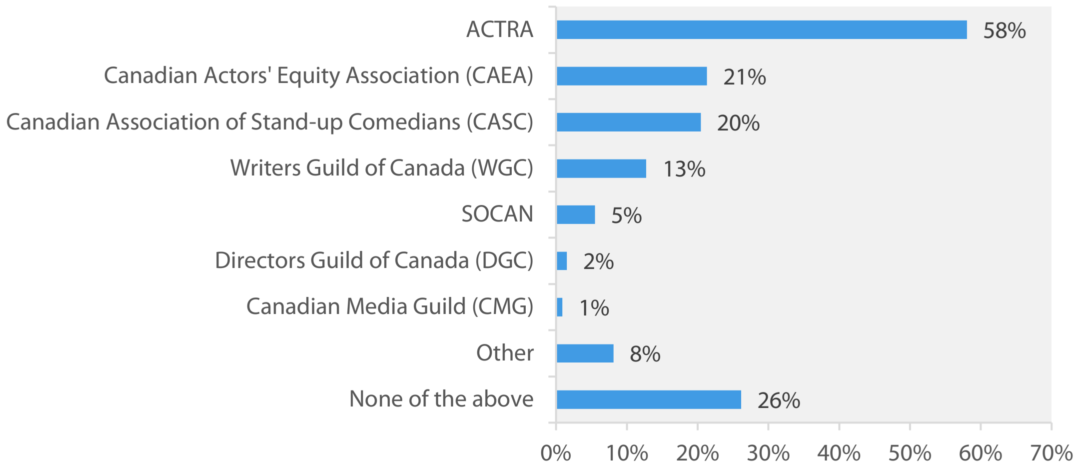


n=335
Source: Nordicity Survey to Comedy Content Creators 2020

- The vast majority of respondents who have engaged in training have taken improv and/or sketch comedy classes in Toronto (87%).
- Roughly a quarter of respondents completed comedy and screen industry programs and classes from accredited educational institutions, with 27% of taking film/TV program or classes, and 24% taking comedy specific classes.
- Some 22% of respondents took online comedy classes and professional programs (e.g. CFC Comedy Program), respectively.
- Other responses, some 16%, included theatre, acting and clowning classes and programs, as well as private and one-on-one comedy training.

The chart below presents the distribution of survey respondents by their affiliations as far as union and guild membership.

Figure 14: Union and guild membership



n=455
Source: Nordicity Survey to Comedy Content Creators 2020

- Over half (58%) of respondents indicated that they were members of ACTRA-Toronto, indicating an apparent link between the on-screen performing and comedy community. Additionally, 21% indicated that they were members of the Canadian Actors' Equity Association (CAEA), followed closely by members of the Canadian Association of Stand-up Comedians (CASC) (20%).
- Roughly one quarter of respondents, some 26%, indicated that they were not members of any union or guild.
- Among those who selected "other" several indicated that they were members of American unions and guilds such as SAG-AFTRA and Actor's Equity Association (AEA).

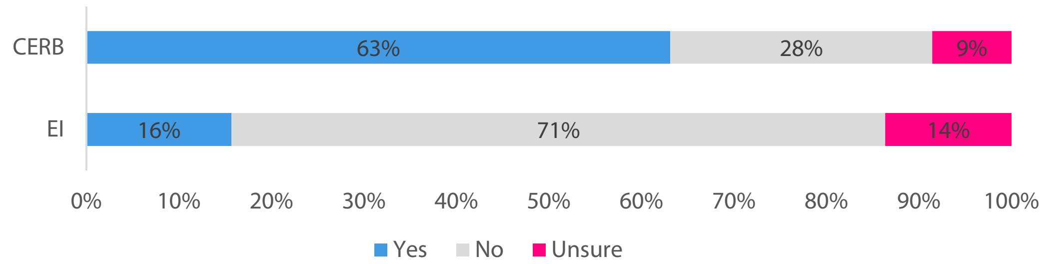
2.3.1 COVID-19 Support

The effects of COVID-19 related shutdowns have been especially devastating for comedy content creators. The closing of live performance venues, as well as the shutdown of festivals and film and television productions has left many comedy content creators without the ability to earn a living. [14]

The following charts, related to COVID-19, reflect responses which were collected in July 2020 and may not reflect current attitudes or perceptions. Survey respondents were asked if they were eligible to collect Employment Insurance (EI) benefits and the Canada Emergency Response Benefit (CERB). The results are presented in the following chart.

[14] Kurek, Dominik, "'Mayor of Comedy' Sandra Battaglini is out of work thanks to COVID-19." *Toronto.com* (April 9, 2020).

Figure 15: Share of respondents with Employment Insurance (EI) and CERB eligibility

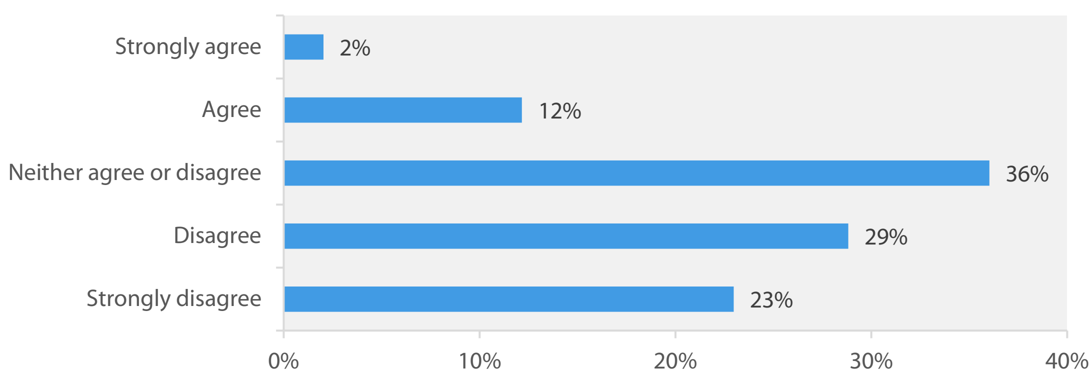


n=491
Source: Nordicity Survey to Comedy Content Creators 2020

- 63% of respondents were eligible to receive CERB.
- 16% of respondents were eligible to receive EI.

Survey respondents were asked to what degree they agree with the following statement: "In the context of COVID-19 government support measures for the culture sector, the comedy sector has been given adequate financial support." The results are presented in the chart below.

Figure 16: "The comedy sector has been given adequate financial support during COVID-19…"



n=444
Source: Nordicity Survey to Comedy Content Creators 2020

- In July, roughly 14% agreed or strongly agreed with the statement regarding government support for the comedy sector during COVID-19. About half disagreed (29%) or strongly disagreed (23%) with this statement.
- In this context, CASC established its own Emergency Relief Fund for Canadian comedians, as a way to support performers, as well as venue staff, producers, servers, and more.[15]

[15] Kurek, Dominik, *Toronto.com*, 2020

2.4 Summary of Profile

The survey sample is sufficiently large that it likely reflects the attributes and profile of Ontario's comedy content creators. As such we can describe the Ontario comedy content creator sector as: experienced; educated; likely living in or around Toronto, in their late 30s or early 40s, quite likely to be white but only a little more likely to identify as a man (60%) than as a woman (40%).

Most comedy content creators would describe themselves as primarily Live or Stage Performers (66%). Indeed, performing live was one of the most significant contributors to comedy-related income for 62% of respondents. Produced media was enormously important to their careers, though less so for their income statements (this issue will be discussed in more detail in Subsection 3.1 below). Just a third of respondents indicated that acting/hosting for produced media was a significant contributor to their comedy-related income (36%). Writing was selected as a top revenue source for just 14% of respondents.

The majority of creators are earning less than $24,500 per year from comedy content creation, and on average total annual income from comedy over the past year was just **$18,900**. Many have second jobs that account for the majority of their earnings. Comedy content creators are seeking to develop their skills constantly with nearly nine out of ten creators having engaged in training of some nature. As of July, comedy content creators in Ontario were generally unsatisfied with the government's support for the sector amid COVID-19.

3. The Challenges and Opportunities Facing Comedy Content Creators

A core objective of this study is to shed light on the challenges facing Ontario-based comedy content creators. This section draws from the literature search, survey responses and interviews to discuss such barriers to success. Several topics covered here will be familiar to those in the film and television industries as well as to artists such as performers and musicians. Prominent themes identified early in the literature scan, and reinforced through the survey results and interviews included:

- Many comedians feel taken advantage of or exploited for their work by being pressured to accept low-or-no pay. While this pressure is mainly true in live performance (e.g., Stand-up, Sketch and Improv) it can extend to produced media. The pressure is effective, in part, because of a lack of opportunities for content creators to gain exposure to industry stakeholders and reach audiences.
- There is intense competition for what can feel like fewer and fewer opportunities to showcase or monetize content/talent. There is a sense of a lack of recognition or demand for Canadian comedy content and lack of supportive structures to combat pressures to accept, for example, low-or-no pay.
- A growing recognition of the persistent lack of support for diversity in the Canadian comedy scene, the difficulties BIPOC comedy content creators face accessing opportunities to advance their careers, as well as instances of direct and indirect discrimination towards BIPOC comedy content creators.

After a summary of the core factors for career growth and produced media success from the survey, the following sections synthesize surveys, interviews and research to discuss the following challenges and opportunities:

1. **Access to public support and appropriate remuneration**– seeking recognition for the comedy content creator as an artist and access to fair pay.
2. **Access to showcase opportunities including celebrating comedy content creators**– recognizing the impacts of media consolidation, declining demand for comedy content from established stakeholders and intense competition for the opportunities that do exist. Encouraging the discoverability and celebration of Ontario's comedic talent.
3. **Addressing discrimination and challenges stemming from a lack of diversity –** confronting the systemic racism and discrimination embedded in the broad Canadian media landscape and supporting meaningful opportunities for historically marginalized creators.
4. **Access to international markets –** resolving the challenges creators face with regard to living and working from Canada while pursuing international opportunities to advance their careers and profiles.
5. **Access to supportive networks –** nurturing the networking and skills development access for emerging and mid-career comedy content creators.
6. **Access to digital opportunities and digital distribution –** supporting the ability of comedy content creators to thrive online including greater awareness of discoverability and monetization opportunities.

3.1 Factors for Career Growth and Produced Media Success

Through the survey, barriers and opportunities were identified from two perspectives: one, what issues were felt to be critically limiting or supporting comedy content creators' **career growth or success** in produced media; two, what factors were hindering their ability to **make a living** from their work. These distinctions were made so as to assess whether the sector requires different approaches to supporting career advancement vs. monetizing content.

What was especially striking with these results was the consistent ranking or prioritization of these highly inter-related issues across barriers and opportunities. As such, we present the top three issues or factors for each question and discuss the major theme in turn below. Charts showcasing the full set of responses are presented in Appendix A and B. The top three barriers felt to be limiting comedy content creators' success, selected by almost half of respondents or more, were:

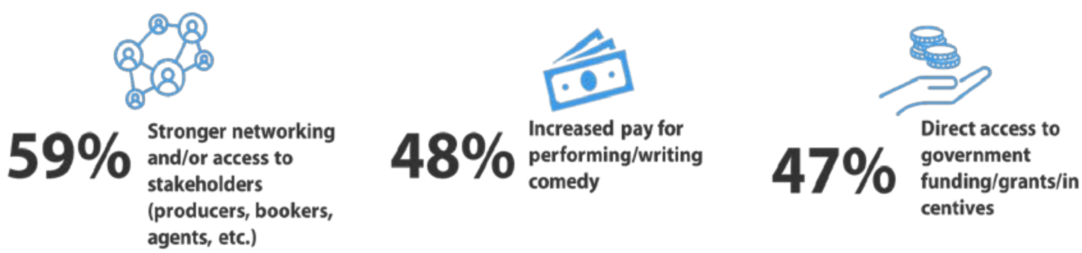
Figure 17: Top three barriers to growth and success in overall comedy career

n=485
Source: Nordicity Survey to Comedy Content Creators 2020

- Other top barriers mentioned included: **Prohibitive costs (e.g. promotion, travel, etc.)** (27%), **Insular and/or unwelcoming nature of the comedy community** (19%), and **Discrimination related to my race, ethnicity, gender and identity** (16%). Discrimination will be discussed in more detail in Subsection 3.4.

The top three most realistic opportunities for future career success overall, selected by almost half of respondents or more, were:

Figure 18: Top three opportunities for respondents' overall future success in comedy

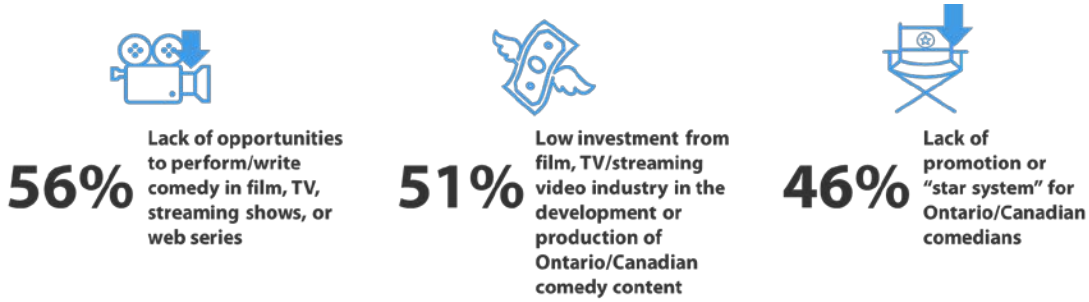


n=470
Source: Nordicity Survey to Comedy Content Creators 2020

- Other opportunities of note included, **Opportunities to build exposure when showcasing in front of industry stakeholders/audiences** (40%), **Lower costs and less red-tape to work outside of Ontario/Canada** (30%), **More opportunities and venues to afford to tour domestically** (29%).

The top three barriers felt to be limiting comedy content creators' ability to make a living from produced media, selected by almost half of respondents or more, were:

Figure 19: Top three barriers to making a living in produced media

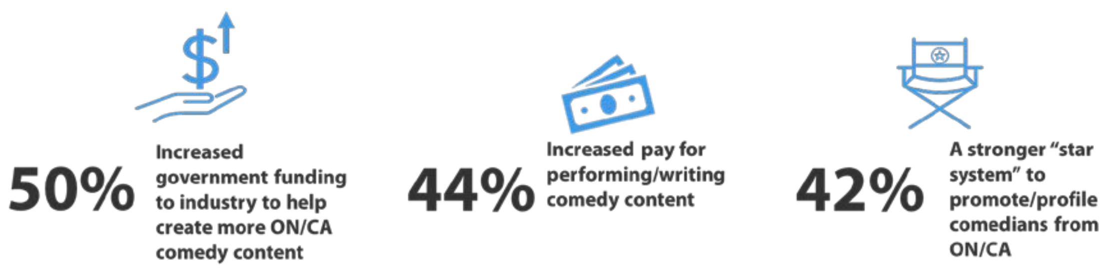


n=476
Source: Nordicity Survey to Comedy Content Creators 2020

- Other notable barriers to the ability to make a living in produced media were the **saturation from non-Canadian comedy content on ON/CA channels/platforms** (34%) **and challenges growing a profile on social media platforms** (27%)

The top three opportunities for <u>monetizing or earning a living from produced media</u> in comedy, were:

Figure 20: Top three opportunities for respondents' ability to make a living in produced media



n=464
Source: Nordicity Survey to Comedy Content Creators 2020

- Other opportunities of note included, **Stronger discoverability/opportunities to reach niche markets/audiences in TV/digital/audio** (37%), **CRTC regulations and policies requiring increased investment in promoting and creating Ontario/Canadian comedy content** (36%), **Increasing my brand/ audience in my online/social media platforms (Instagram, YouTube, TikTok, website)** (30%)

The following section expands on the insights provided from the literature review, survey open responses and interviews.

3.2 Access to Public Support

As a reminder, the scope of this study is focused on Ontario-based comedy content creators. There are references to the broader Canadian context because survey respondents and interviewees often drew on experiences which extended beyond Ontario. The Québec context, however, is largely excluded. Presently, comedy content creators in Ontario, and the rest of English-speaking Canada, are not recognized independently as artists that can apply directly for funding as comedians e.g. to arts councils at the municipal, provincial or national level. Some comedy content creators may access public support indirectly through the cultural industries i.e., for film, television, and digital media projects or for their theatrical performances, under the arts. For many stakeholders, this ineligibility and lack of recognition is at the root of the challenges facing the sector and stands in the way of, particularly emerging, voices to survive and thrive.

The exclusion of comedy content creators from the public funding eco-system was frustrating for many survey respondents and interviewees who see many parallels between the comedy content creator and musician and theatre performers who *are* supported publicly. As one survey respondent explained, "Comedy is treated as a separate 'performing art' - when really it is a hybrid of performance and writing. Yet it does not qualify for a lot of the theatrical grants and programs. With stand-up, there are many years put into developing your act, getting your stage presence, and doing the work and it is all unpaid."

Advocates and comedy television industry stakeholders interviewed suggest that the lack of recognition and funding for live performance thwarts potential development that fuels produced media comedy. CASC have worked constructively to have live comedy, specifically stand-up, be recognized officially as an art form by Canadian Heritage. This recognition would enable live comedy performers to gain access to greater funding and support mechanisms, assisting career investments such as developing more polished and professional content for distribution, marketing activities and discoverability, touring more safely and ambitiously, and seizing international and export opportunities. As one television stakeholder interviewed noted, "there needs to be more money in the system, and it needs to be early in the career line. Not just at the TV level, but before that."

Beating them to the punchline: How Canadian stand-ups are trying to change the funny business

"CASC's lobbying has been pushing two main issues. The first is that the Canada Council for the Arts, the country's largest granting agency, does not recognize stand-up comedy as an art form. The Council gave out $202 million in grants to more than 2,000 artists in 2017-18, and comics say they should have a slice of that.

So far, the council is not budging. They say comedians are free to apply for grants if they also practise other disciplines – such as circus performing, dance or theatre – but that their funding model was recently revamped and they don't want to make any more changes for the time being. (It's worth noting that the Department of Canadian Heritage has given money to some festivals, such as Just For Laughs)."

Chris Hannay, *The Globe and Mail*, November 23, 2018.

As with many artists, comedy content creators bear enormous risk and are embarking on an uphill battle to transform their passion into a sustainable practice. The pressure to give up is constant, not only for performers but all types of comedy content creators. Access to public support for the creator, could also help improve the balance of power between the creator and the producer/distributors. One survey respondent summed up the potential return on investment as far as creators' abilities to grow their craft and access international markets more effectively, "We have had great success in foreign markets (the US, UK and AUS), but have received no government support or industry support to allow us to expand. We function through Patreon to gather funds and have been growing in our level of success. We need direct investment to level up faster and locally."

There are, of course, stakeholders who fear that direct government support would hinder free speech and/or dilute Canadian comedy content. There are also concerns that some organizations and individuals will be prioritized to receiving funding over others. But as one interviewee noted, the lack of funding is especially puzzling given comedy's cultural impact not only in Canada but also around the world, explaining, "the world turns to comedy in times of crisis and stress. Surely it is culturally beneficial to train, support and elevate talent development for comedy content creators." The broad hope expressed in surveys and interviews was that greater public support would nurture stronger comedy content creators and contribute to their ability to work successfully in Ontario.

3.2.1 Access to Appropriate Remuneration

Early in their careers, comedy content creators are so eager for performing opportunities, it can mean performing for little to no pay. Venues will explain that, for many unknown performers, the venue is the draw, not their particular performance. In *The Globe and Mail* in 2018, Chris Hannay estimated that, "a comic headlining a single show at Yuk Yuk's comedy club might earn $150. Corporate gigs can range from $200 to $1000, or more, but are hard to come by."[16] However, even comedians who have years of experience and credits on late night shows and who have performed at major festivals can struggle to find appropriately paid performing and/or touring opportunities in live.[17] This familiar narrative of stand-up comics travelling from city to city, crashing on sofas or in their cars, performing for small crowds at small venues, is especially true in Canada, where touring can be mean substantial travel lengths between towns for low-paying gigs.[18]

The environment is also highly competitive. With so few opportunities available to perform, it can be difficult for comedy content creators to negotiate higher pay with presenters or club owners. Many are also working without agents, talent managers or representation who might otherwise protect them from nefarious rates and practices. Indeed, the Canadian comedy eco-system is small and has few agencies in operation – mainly Yuk Yuk's funnybusiness.ca, Diamondfield Entertainment, The Second City, Grand Wave Entertainment and The Baxter Agency. Often, comedy content creators have a sense that if they walk away from an opportunity to perform, there are others who will accept the low payment. Thus, as interviewees and survey respondents indicated, a cycle is created whereby comedy creators are offered and accept low wages by presenters, "the rates are ridiculously low and the competition for the few paying gigs means there is no chance for increased pay unless people are willing to turn down work as a group to raise the pay."

By contrast, work in produced media, and particularly in TV, is in line with ACTRA rates. These roles are both more competitive and more lucrative. Broadcasters estimated that development budgets can range from $45,000-200,000 but that on average development costs for a comedy production would be $65,000. Of that, the writer or talent would earn about $20,000. That being said, even in those roles, comedy content creators are often not eligible for or are overlooked for the highest rates. One survey respondent noted, "Comedy is lowest recognized art form on both the writing and performance side. The [Writers Guild of Canada] has no minimum rates for punch-up artists in film/TV. Neither ACTRA or Equity protect wages for stand-up comics."

3.3 Access to Showcase Opportunities

Two of the top barriers, "Lack of Opportunities to Perform/Write for Produced Media" and "Lack of Investment from Produced Media in Canadian Comedy Content" are deeply inter-connected. The combination of highly competitive and low volume of opportunities in the Canadian comedy content scene is a major barrier to success for creators.

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[16] Hannay, Chris, "Beating them to the punchline: How Canadian stand-ups are trying to change the funny business." *The Globe and Mail* (November 23, 2018).

[17] Isador, Graham, "Canadian stand-up comedians just rallied against Just For Laughs – and won." *CBC Arts* (Feb 28, 2019).

[18] Isador, Graham, *CBC Arts*, 2019.

Recent consolidations in the media landscape, over-the-top streaming network growth, and more content being distributed online and through social media, have resulted in fewer structured opportunities for creators to share their content through produced media. Today there are two or three main broadcasters in Canada who consistently fund original comedic programming for television and for Canadian streaming platforms, CBC, Bell/Crave and to a lesser degree Corus Entertainment. Comedy television stakeholders say that given their finite resources and limited allotment of prime-time slots, the opportunities to fund original comedy content are further reduced. Additionally, interviewees posit that broadcasters prioritize dramatic content over comedy, so budgets are being devoted elsewhere. The scale of the Canadian media eco-system is such that the number of paying buyers for top comedy content in produced media is low, and competition for their few slots is high. An ancillary impact of this consolidation and the low volume of original comedy production in Canada, is the limited number of writing room opportunities for comedy content creators to seize. One television stakeholder estimated that there were probably seven television comedy writing rooms in the country, producing anywhere between six and thirteen episodes each. With so few opportunities, the chances of accessing one of these established and stable roles in Canada is very slim.

Some illustrations of the intensity of the competition and limited opportunities in comedy produced media include:

- *The narrow funnel from pitch meeting between producer, creator and broadcaster to a project going into production.* Broadcasters and producers alike described the stakes as extremely tough. On average, a broadcaster's team might take, in some shape or form, **1,000 pitch meetings a year**. Of those 1,000 projects pitched, approximately 10 or **<u>one percent</u> will enter the development stage.** Of those ten projects that go into development, **one will be greenlit for production**. By these measures if you are one of those creators able to access a broadcaster to make your pitch, the chances of your project advancing through to production of a pilot is less than **0.1%**.
- *The Sirius XM Canada and Just For Laughs (JFL) partnership:* In 2019, Sirius XM Canada and Just For Laughs (JFL) announced a relationship in which JFL would become a programming consultant on a re-brand of the satellite radio channel 168. This consultant relationship would convert the CRTC licensed Sirius XM Canada channel from "Canada Laughs" to "JFL Canada." The new brand would no longer air exclusively Canadian comedy content from independent comedy artists, and would instead air JFL archived content. Historically, JFL archive content featured mostly foreign comedians. This change would mean that many Canadian comedy content creators could lose a significant source of produced media income and, equally important, the opportunity to showcase their material and brand to the global digital media market. Many creators reported relying heavily on royalty payments that came from their performances airing on satellite radio, including Canada Laughs.[19] As a result of protest from the comedy community, JFL and SiriusXM opted to continue to air comedy content created by independent Canadians exclusively. However, this situation emphasizes just how precarious working as a comedian in Canada can be, with the community citing that a seemingly small change sent ripples that would significantly affect the livelihood and careers of many.[20]

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[19] Mudhar, Raju, "Comedians meet to plot action over Just For Laughs radio takeover." *Toronto Star* (February 27, 2019).

[20] Isador, Graham, *CBC Arts*, 2019.

- *Festival Showcases:* With Hollywood and New York agents, managers and producers in attendance, some Canadian comedy festivals can act as a launching pad for career opportunities in produced media. One such showcase taking place in Canada "…has become such a big deal in the comedy business that it attracted its own Amazon Prime series." [21] But, most or all of the prime spots on these showcases are often given to comedians who are from the U.S. or other countries. These gaps in discoverability and public support for Canadian comedy content creators directly impact opportunities for growth, monetization and produced media success thus reducing opportunities to retain comedy jobs in Ontario.

In response to the limited opportunities, comedy content creators in Canada are increasingly developing their own showcases by building audiences directly through social media (e.g., shows on Instagram Live, podcasts, Twitter followers and so on). While digital distribution is no panacea for creators, it has been a springboard for many Canadian creators, particularly amid COVID-19. As the Toronto-based Julie Nolke explains (Nolke's video "Explaining the pandemic to my past self" has gained more than 15 million views at her YouTube channel alone), "I'm part of this saturated market of actors in Toronto and we're a very tight-knit community. It's interesting because the minute I went viral, I became part of a different tier of actors in Toronto. I immediately had validation, which I thought was really fascinating and a little bit disappointing because my acting and writing skills have not changed whatsoever. Having YouTube numbers, networks really like that. The coolest change is that the parts that I audition for are bigger and I was able to write in a writing room during this time, which I don't think I would have been considered to do before."[22] Supporting and strengthening the ability of comedy content creators to distribute and stream content online (in Canada and globally), whether through discoverability support, skills development or other means, would be encouraging for the sector's success.

3.3.1 Celebrating Comedy Content Creators

One perceived factor in the lack of showcase opportunities is English Canada's enduring lack of an established star system or media machine to support its own cultural content. The comedy content creator community contends that there are few occasions for Canadian talent, who remain in Canada, to gain media exposure and build their brand through profiles, features, interviews and so on. The over-sized influence of American media on Canadian culture and consumption has been well-researched over many decades. Canadian entertainment shows (e.g. *etalk, ET Canada*, etc.), media websites and magazines are critical to raising awareness of Canadian entertainers to Canadians, and yet, the U.S. comedy scene's disproportionate influence on Canadian comedy consumption in produced media (remains incredibly strong.

Interviewees and survey respondents made comparisons to the United Kingdom and the abundance of celebrity and comedy-focused panel and game shows. Shows like *Would I Lie to You?, 8 Out of 10 Cats,* and *Mock the Week* are very popular in the U.K. They present U.K. actors, comedians and personalities to national audiences and are major career springboards and profile-builders. As one survey respondent explained, *"*In the US, many young comedy writers/comedians get their start working for shows like Late Night With...and other various talk shows. They transition through that onto bigger things. Here in Canada (Ontario) -- those opportunities barely exist.*"* Today CBC Radio's *The Debaters*, and perhaps to some degree *This Hour Has 22 Minutes*, and Canadian format shows such

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[21] CBC Comedy, "Just For Laughs' New Faces shines the spotlight on Canada" (July 2019)

[22] Dhopade, Prajakta, "This Canadian explained the pandemic to her past self. Yeah, you've seen the video." *Maclean's* (September 2, 2020).

as *Great Canadian Bake Off* provide some exposure opportunities along the style of entertainment news shows, but perhaps not to the degree of success as in Québec, the US or U.K.

Television stakeholders were optimistic that Canadian programs that have received national and international acclaim, such as *Schitt's Creek*, *Kim's Convenience*, *Jann*, *Letterkenny*, and *Canada's Drag Race*, are contributing to the demand for Canadian comedy voices – in Canada and internationally. As one survey respondent underscored, "Creating resources and opportunities for a star system in Canada is important, especially now that Canadian content is recognized more and more in other countries. There needs to be a feeder system in Canada for people to aim for, otherwise the best option is often leaving Canada for better opportunities/pay." As mentioned previously, finding and reaching audiences directly through social media has also been enormously important for emerging creators, raising their profile and opportunities to be discovered by audiences and other sector stakeholders.

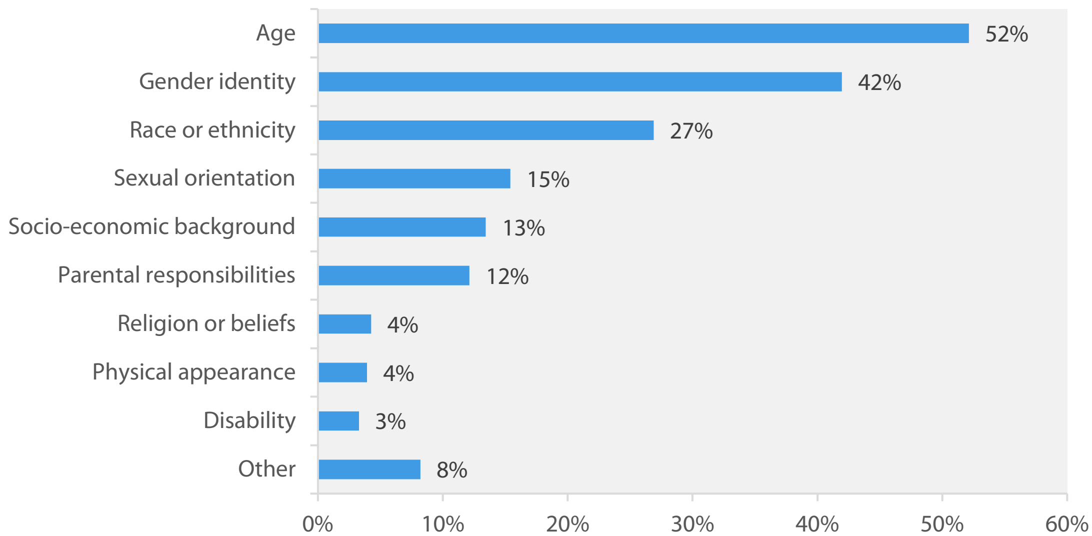
3.4 Discrimination and Challenges Stemming from a Lack of Diversity

The Canadian media landscape, as many sectors, is confronting its lack of progress on diversity and inclusion for historically marginalized groups. The #BlackLivesMatter movement is forcing organizations with power to assess and improve their records on amplifying the voices of Black, Indigenous and People of Colour in Canada. From both interviews and news headlines, it seems the comedy content creation sector in Ontario is also beginning to see the ways in which discrimination and other toxic behaviours may have been allowed to persist in the comedy community.

In the broad list of barriers (presented in Appendix A), about one in six respondents overall selected that "experience with discrimination related to my race, ethnicity, gender or identify" had been a negative factor in their career.[23] That share placed it about halfway down the list of main barriers discussed above. Other areas of the survey provided more of an opportunity to expand on comedy content creators' experiences of harassment in the sector. Respondents were asked if they ever felt discriminated against for any of the following reasons.

[23] Approximately 40% of respondents overall identified as women, 18% as members of visible minorities or as a person of colour and approximately 2% as Indigenous.

Figure 21: Share of respondents that experienced discrimination



n=305
Source: Nordicity Survey to Comedy Content Creators 2020

- **More than 300 respondents indicated that they had experienced discrimination along at least one of these dimensions**. The highest share of respondents, some 52%, felt that they were discriminated against due to their age while working in comedy. As respondents highlighted, "ageism is rampant in this industry," as it is in the entertainment industry on a whole. As illustrated previously, 35% of survey respondents were over the age of 45.
- Some 42% of respondents said that they felt as though they were discriminated against for their gender identity. Note that 40% of survey respondents identified as women, and 16% identified as LGBTQ2.
- 27% of respondents said they felt discriminated against for their race and/or ethnicity. Nearly two in ten (18%) of comedy content creators identified as members of visible minorities or as a Person of Colour.
- Of the 8% of respondents who selected "other" many (approximately 3% of total responses) noted that they felt discriminated against and were not given work opportunities, especially on screen, based on their physical attractiveness (i.e. their looks and/or weight).

Survey respondents shared anecdotes about their experiences witnessing or experiencing sexism and/or racism while working in Ontario's comedy industry. Some stated that those accused of discrimination often faced minimal consequences, while those who reported harassment faced retaliation from the comedy community. For several respondents, these experiences were the main issue in deciding whether or not to remain in the industry in Ontario. A lack of accountability and acknowledgment by industry stakeholders about the inequities and abuse that exists was enormously frustrating for respondents.

Recent progress in the representation of BIPOC content creators, *was* seen as a positive step toward changing the industry's profile, but many barriers still exist. Interviewees and survey respondents alike, described a frustrating tendency towards tokenism throughout the comedy industry. Tokenism, in this context, meaning that a writer's room, cast, or even a festival lineup, would be deemed sufficiently diverse when it included a single BIPOC, or women-identifying comedy content creator. One Toronto based comedian, Danish Anwar, explains: "I've heard many agents or bookers say, 'Oh, we already have a brown guy on this show, we already have a woman on this show, or we already have a gay guy on this show.' Because to them, 'normal' means straight white guy. They're underestimating their own audience. They think everybody thinks like them."[24] *Tallboyz*' Vance Banzo suggests that, "Canadian Comedy doesn't suffer from lack of diversity but a lack of interest in diversity from industry professionals. Listening and taking concerns from marginalized voices seriously and supporting unique storytelling, are a couple of changes I'd like to see take place." His fellow *TallBoyz* creator Guled Abdi, urges the Canadian industry to, "Invest in marginalized voices. Don't just bring them in the room but actually give them the same resources and space to create the content they want."

Toronto's LGBT comedians of colour carve out space with The Ethnic Rainbow

"Toronto is one of the most diverse cities in the world, but you wouldn't know it if you went to see stand-up comedy. From large venues such as Yuk Yuk's down to the smallest open-mic nights, comedy in Canada's largest city can still be overwhelmingly straight, white and male. Feminist-centric shows, shows featuring people of colour and LGBTQ comedy shows have all launched in recent years. But this month will mark a major milestone for stand-up comedy in Canada with The Ethnic Rainbow, the first and only show that features LGBTQ comedians of colour.

"Most shows are just straight white dudes. If there's a comedian of colour, usually they'll only have one at a time," says Brandon Ash-Mohammed, who is producing the show at Comedy Bar on Feb. 25. "I was like, 'I need to make a space for people like me.'"

Dave McGinn, *The Globe and Mail*, February 20, 2018.

Some interviewees highlighted the success of training and/or mentor matching programs in Canadian comedy writing rooms as a means to support and advance more diverse voices. While these initiatives would seem to be steps in the right direction, feedback suggested that these sessions do not often translate into sustainable career opportunities and can feel somewhat tokenistic in nature. Such programs need further evaluation as to their efficacy in supporting the careers and elevating the voices of new generations of diverse Canadian comedy content creators.

As one survey respondent commented, "…with so much discrimination against BIPOC, people with disabilities, Women, LGBTQ+ in comedy starting to be exposed and talked about. What changes do we all have to make to have Comedy accessible to all who want to participate?" All interviewees acknowledged the critical importance of increasing support for BIPOC creators and aiming to reflect the diversity within the population, on-screen, behind the camera and in the writers' room.

3.5 Access to International Markets

As with screen sector talent, musicians, digital media creators and other creatives, comedy content creators too feel the pull to work outside of Canada to advance their careers. This subsection provides further insight into that draw to work, often in the United States, and is based on the literature search, survey responses and interviews.

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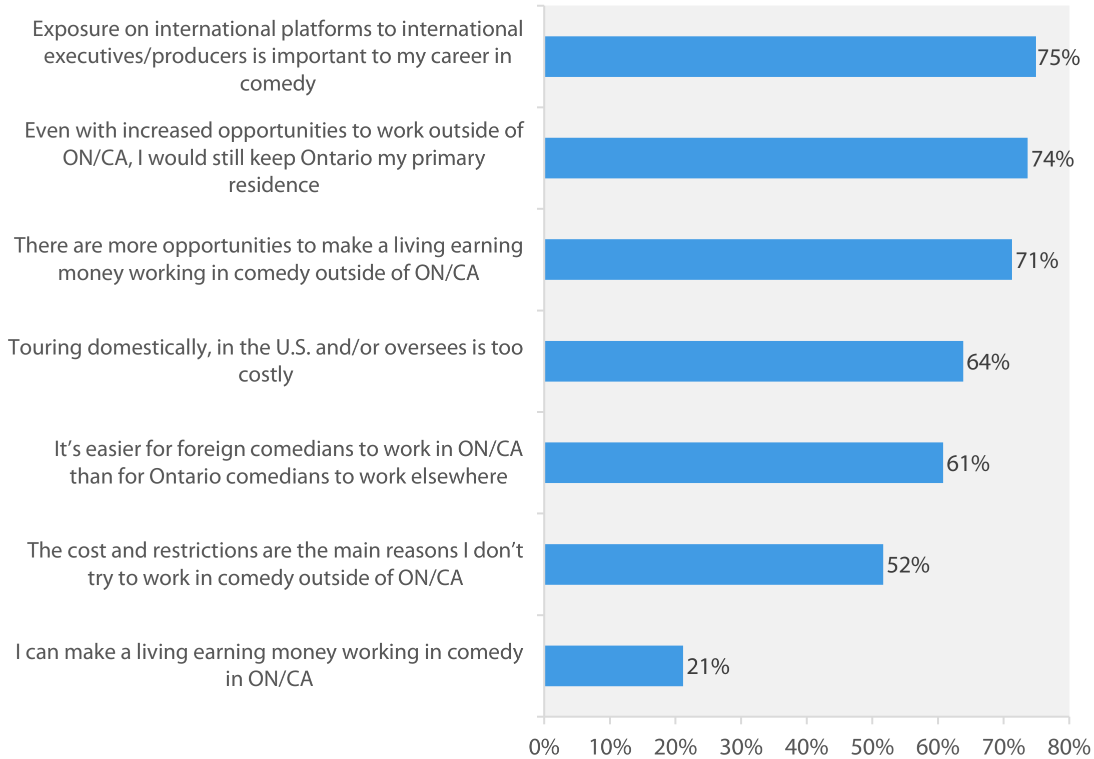
[24] Doyle, John, "Diversity? "What diversity? No time to be smug about the state of TV," *The Globe and Mail* (February 27, 2018).

Survey respondents were asked to indicate their level of agreement or disagreement with seven statements pertaining to their experiences working in Ontario's comedy sector and opportunities for working internationally. The chart below shows the share of respondents who **agreed** with the statements presented.

Figure 22: Share of respondents who agree with following statements about working in ON/CA



n=459
Source: Nordicity Survey to Comedy Content Creators 2020

- Three quarters of respondents agreed both that "**exposure on international platforms or stages to international executives and producers is important to their career in comedy**" (75%) and that "even with increased opportunities to work outside of Ontario, they would keep Ontario as their primary residence" (74%).
- Nearly three quarters of respondents (71%) agreed that there are more opportunities to make a living working in comedy outside of Ontario.
- High costs are a major deterrent in working internationally. Some 64% of respondents agreed that touring domestically, in the U.S. and/or overseas was too costly. While about half of respondents (52%), agreed that cost and restrictions are the main reasons they do not try to work in comedy outside of Canada.
- Over half of respondents, 61%, agreed that it is easier for foreign comedians to work in Ontario than for comedians from Ontario to work elsewhere.
- Only 21% of respondents agreed that they could make a living while working in comedy in Ontario.

The results above illustrate the constant tension between staying in Ontario and pursuing work internationally. There is broad agreement that more opportunities for comedy content creators exist outside Canada and that working outside of Canada would be good for their careers. High costs are a major barrier to pursuing these potential opportunities. Most would wish to keep Ontario as their primary residence if they could. In fact, the top two most agreed upon statements suggest that access to international markets is a top priority for comedy creators in increasing their ability to remain in Ontario when working in comedy.

Beating them to the punchline: How Canadian stand-ups are trying to change the funny business

"…The other issue is reciprocity with the United States. Canadian comics say that because the domestic industry is relatively small, once they get to a certain point in their career, the only way to get more work is to move outside the country.

U.S. artists face few barriers to working in Canada, but for Canadian artists who want to work in the U.S., it's a lot harder. Work visas cost thousands of dollars and require reams of recommendation letters to back them up.

[…] "It feels like one of those obstacle courses," Ms. DiGiovanni said. "And it just feels like it could be a little shorter. You know what I mean? Instead of running those tires for six miles, two miles, would that be enough?"

Comedy isn't the only industry that's complained about labour mobility between Canada and the U.S. In its lobbying, CASC hoped to convince the Canadian government to get stand-ups added to the list of jobs that face fewer barriers in the North American free-trade agreement […]. But when a new trade deal was unveiled Oct. 1, unfortunately, the chapter on labour mobility remained untouched."

Chris Hannay, *The Globe and Mail*, November 23, 2018.

Like all those who want to achieve success working in the entertainment industry, many are especially drawn to Los Angeles and New York City. Working in the United States as a Canadian comedy creator is a lengthy and financially draining process. Taking an average of six months, the application, and the work of an immigration lawyer, for an O-1 visa (commonly obtained by comedy content creators) can cost between $5,000-$25,000.[25] On the bureaucratic hurdles Canadians face, stand-up comedian and television writer, Rebecca Kohler says " I wish it was easier for Canadians to seed our pots, grow a bud, and then move here [to the United States] without needing $10,000, and a lawyer, and a lot of paperwork."[26] Beyond the barriers mentioned above, comedy content creators applying for a visa must prove that they possess "extraordinary abilities." Applicants must provide evidence of this ability, in the form of nationally or internationally recognized awards and prizes, high paying contracts, a record of notable achievements in the motion picture or television industry,

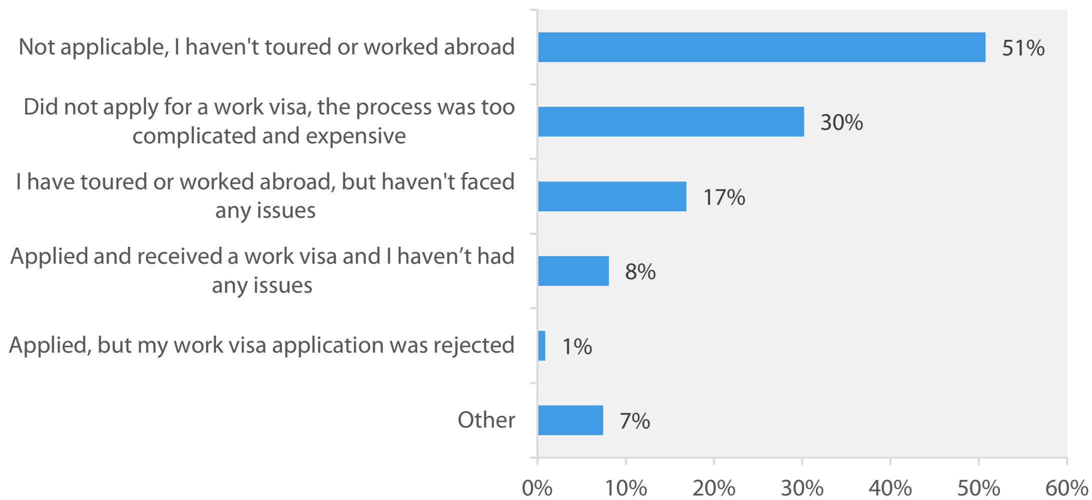
[25] Borys, Christian, "'Extraordinary Person' Visas and the Plight of Canadian Comedians."*Vulture* (December 1, 2014).

[26] "Moving Down South – Next Up – Episode 2" *CBC Comedy* (November12, 2019) https://www.cbc.ca/comedy/do-you-need-to-move-to-the-u-s-to-make-it-in-comedy-1.5339329

and/or other merits.[27] Conversely, comedy creators from the U.S. face far fewer, if any, barriers when coming to work in Canada.

Given the strict approval processes and financial burdens of acquiring a visa, survey respondents were asked if they have faced any issues related to touring and working abroad. The results are presented in the chart below (respondents could select more than one response).

Figure 23: Comedy content creators' response to issues related to touring and working abroad



n=457
Source: Nordicity Survey to Comedy Content Creators 2020

- Over half of respondents, some 51%, indicated that they had not toured or worked abroad.
- 30% of respondents had not applied for a work visa because the process is overly complicated and expensive. Another, 17% of respondents indicated that they *had* toured or worked abroad and did not face any issues. What is not clear is whether these respondents worked abroad without obtaining a visa and/or green card.
- Only 8% had applied for and received a work visa and did not have any issues, while 1% had their work visa applications rejected.
- Some of those who selected "other" formerly had a visa but found it too costly and restrictive to maintain or applied for an extension and were denied. Others noted that they had dual citizenship or had a spouse who had U.S. citizenship.

Despite the barriers to working abroad, many comedy content creators feel in order to advance their careers they must take the risk and leave Ontario (or Canada).[28] Sandra Battaglini, comedian and president of the Canadian Association of Stand-up Comedians, refers to the dilemma Canadian comedians face as "the circle of entrapment." The circle of entrapment describes the experience felt by comedy creators in Canada, where once they have reached a particular milestone they can no longer advance their careers in the country, however leaving Canada is a major risk with major

[27] "O-1 Visa: Individuals with Extraordinary Ability or Achievement." *U.S. Citizenship and Immigration Services*.

[28] Johnston, Andrew, "Why this Toronto comedian is following the mass exodus out of Canada," *NOW* (October 25, 2017).

financial implications.[29] Part of the risk-and-reward scenario creators are weighing, includes the lure of stronger earning potential in the US. As one television stakeholder interviewed put it, working in American entertainment hubs can be incredibly lucrative, specifically during pilot season, and is considered a rite of passage for many comedy content creators.

When speaking on the draw of working in the United States, comedian Andrew Johnston says: "Do I think that I'm going to achieve super-stardom? No, not at all. It's not that the grass is greener in the U.S., it's that there isn't any grass in Canada. All I want is to make a living wage working in my field."[30] International work is also perceived to legitimize Canadian comedy creators in the eyes of Canadian sector stakeholders. Comedian, Darrin Rose, explains, "…Canadians don't really respect you unless you leave. Canadians love nothing more than a comedian who left the country. They go, 'oh well he must've been great if he left!' which is such a weird low self-esteem thing that we have."[31] This frequently cited notion coupled with a lack of opportunities, low pay and geographic proximity prompts many comedy creators to leave Canada and work, and live, in the United States, taking their Canadian-honed talent along with them.

Many comedy content creators who have left Canada credit their success abroad to their experience navigating the challenges of the Canadian comedy scene. Allana Harkin, originally from Toronto and currently a producer on Full Frontal with Samantha Bee, is quoted as saying "In Canada, you need to diversify…I had to do multiple things to make a living but now I can use all those things in my job."[32] The implication being that, despite being small, the intensely competitive Canadian landscape is a strong training ground and gives comedians more opportunities to find their voice, which serves them well outside of Canada.[33]

3.6 Access to Supportive Networks

As mentioned previously, 59% of responses indicated that stronger networking and access to stakeholders, such as producers, bookers and agents, would contribute to their overall future success in comedy. According to one television stakeholder interviewee, establishing a relationship with producers is crucial in being able to pitch concepts to broadcasters. As many comedy content creators are unrepresented (by an agent or manager), producers often act as liaisons between broadcasters and comedy content creators, brokering meetings and outlining potential costs and budgets. Additionally, because of the finite resources devoted to comedy, broadcasters say they typically require a producer to be attached to a project in order for the project to access funding from the Canada Media Fund and others. Survey respondents echoed the importance of establishing a relationship with a producer in order to have a guide through the funding, development and sales cycle of a project.

As seen previously, comedy content creators in Ontario are highly trained when it comes to comedy-specific skills. However, industry stakeholders interviewed noted that there is room to expand training opportunities, by offering more in terms of practical business insights and marketing and export skills.

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[29] Khanna, Vish, "Comedy Records and Exclaim! Showcase Supports the Canadian Association of Stand-Up Comedians." *Exclaim!* (July 2, 2018).

[30] Johnston, A, *NOW,* 2017.

[31] Borys, C, *Vulture,* 2014.

[32] "Moving Down South – Next Up – Episode 2" *CBC Comedy*, 2019.

[33] Mutabdzija Jaksic, Vanja, "Canadian comics on whether moving south of the border is crucial for a successful comedy career." *CBC Comedy* (August 17, 2020).

They stated that many are lacking important skills that are fundamental to working successfully as a comedy content creator in Canada, including how to file taxes as freelancer and basic accounting, preparing for pitch meetings, and negotiation skills. Survey respondents suggested re-evaluating the availability of comedy-related training to make resources more widely available outside Toronto. Respondents who live in smaller communities highlighted that it would be helpful to them and their peers to have access to education, training, and development opportunities in order to advance their careers. One survey respondent suggested to, "Fund programs that connect comedians with businesses. We have an ability to write, perform and produce content and businesses have a need for content to help promote their business. How about business grants that allow entrepreneurs to connect with a talent pool and pay them to create online content?"

Community-led initiatives have been able to establish more networking opportunities and create more of a foundation for a greater sense of cohesion among Ontario's comedy content creators. Advocacy groups and membership organizations, such as Canadian Association of Stand-up Comedians (CASC) and the Foundation for Canadian Comedy (CANCOM) lead initiatives that collectively bring the comedy sector together, and have helped to provide resources and supports. For example, CASC was instrumental in rallying the comedy community and organizing town halls and media coverage, in the dispute with JFL over the *Canada Laughs* takeover.[34] This coming together signaled a rare victory for the community and showed that change is possible when there is collaboration.[35] Additionally, many in Ontario within underrepresented groups have created their own opportunities to network and establish a sense of community and support systems, by organizing festivals, events, and projects to showcase diverse voices. Shows and festivals like the *Ethnic Rainbow*, *Being Muslim in Canada*, the *Nubian Shows*, and countless others, have provided opportunities for comedy content creators to interact with peers and establish networks.

3.7 Access to Digital Opportunities and Digital Distribution

Another focus of the study was to shed light on the opportunities derived from distribution on digital platforms. Previously, we saw that just 5% (approximately 25 respondents) identified primarily as social media content creators. However, nearly a third (29%) of respondents selected social media content creator as their secondary role. Income from social media was the lowest of all platforms, however interviewees described the importance of social media in terms of gaining access to audiences, building a profile and occasionally, getting noticed by producers.

Respondents were asked to select a maximum of three platforms which they believed had the greatest potential for growing their comedy-related incomed in the coming 1-3 years. The results are presented in the chart below.

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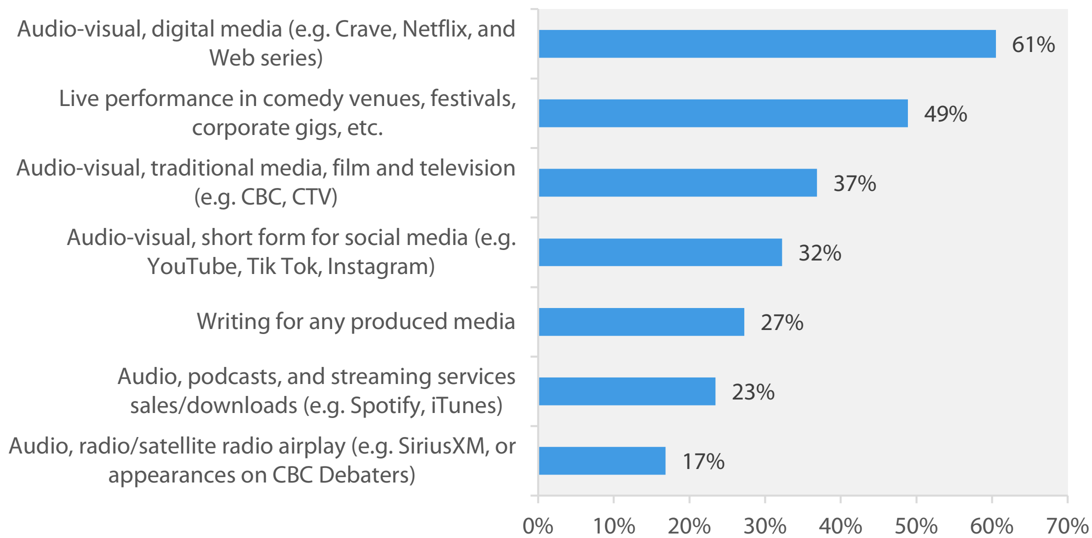
[34] Mudhar, R, *Toronto Star*, 2019.

[35] Isador, G, *CBC Arts*, 2019.

Figure 24: Top platforms for comedy-related income growth in coming 1-3 years



n=499
Source: Nordicity Survey to Comedy Content Creators 2020

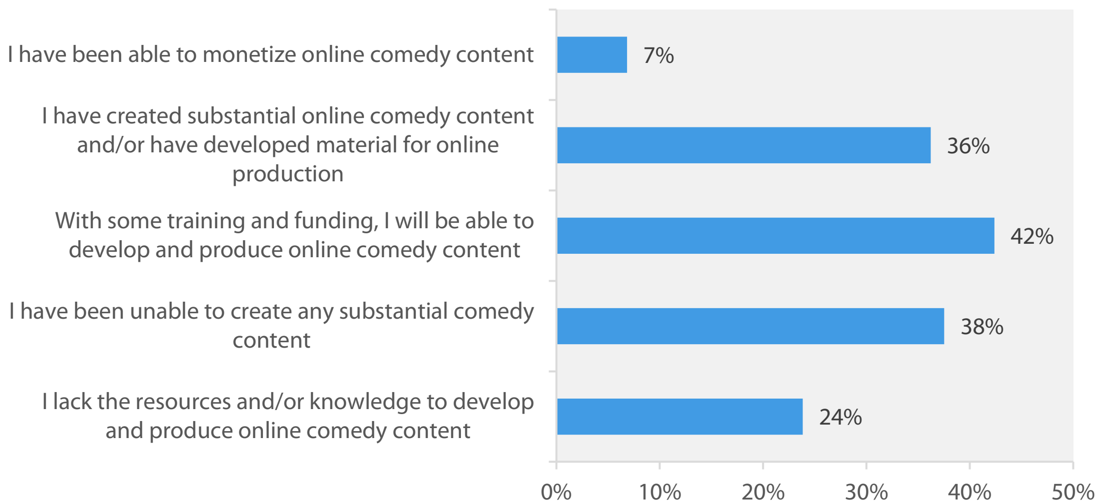
- **Six in ten (61%) respondents indicated that audio-visual, digital media, such as streaming platforms as the most viable platform for increasing their comedy-related income.**
- 49% of responses show that live performance in comedy venues, festivals and corporate functions will have significant potential in growing comedy-related income.
- Audio specific platforms, such as podcast streams and downloads and radio/satellite radio airplay, were seen to have the least potential of growing comedy-related income in the coming 1-3 years. That being said, comedy creators interviewed noted how podcasts are used as a tool to gain more exposure and showcase comedians' specific talents and attributes, which can indirectly lead to income growth.

Although social media alone does not generate a viable income, interviewees shared that having a strong social media presence is becoming increasingly crucial to accessing opportunities that *are* more lucrative. A television stakeholder interviewed noted that social media content and following is often considered when hiring writers for comedic content. One interviewee specifically noted that TikTok and Instagram Live, especially throughout the COVID-19 pandemic, have become new tools for comedians to showcase their talents and gain exposure, by either sharing previously recorded live performances or producing new material on the platforms. The true benefit of social media, said interviewees, is that it is free from gatekeepers, and virtually anyone, despite their credits or background has the ability to gain a following, which can lead to more opportunities. While outside of the scope of this study, it should be noted that Ontario comedy content creators can face a range barriers to gaining crucial traction on social media due to algorithms, resources and the population in

Canada compared to other markets, all of which are metrics that help content reach a broader audience.[36]

During the COVID-19 pandemic, many comedy content creators turned to online mediums to share their work. Survey respondents were asked, based on the statements presented, how they would describe their opportunities to create comedy content on online/digital media platforms as a result of COVID-19 related shutdowns. Respondents could select up to three responses that applied to their situation, the results are presented in the chart below.

Figure 25: Opportunities to create comedy content on online/digital media platforms during COVID



n=453
Source: Nordicity Survey to Comedy Content Creators 2020

- As of June 2020, only 7% of respondents said that they had been able to create and monetize online comedy content during COVID-19 related shutdowns. This low number underscores interviewees assertion that there are barriers to monetizing online or social media content that are specific to Canadian comedy content creators.
- A substantial number of responses, 42%, indicated that with training and funding, they would be able to develop and produce online comedy content. This shows that many respondents feel as though there are barriers in not only monetizing online content, but in simply being able to create it.

One barrier for growing earnings from social media content distribution is the lack of advocacy for Canadian creators towards the primarily American-owned and based entities. For example, the lack of, music licensing and rights agreements between the Canadian platform office and the American parent companies. For comedy creators working in, say, reaction videos, parodies or other niches, this gap may result in copyright claims that their American counterparts would not face and lead to lower revenue from ads despite strong views/streams.

As some interviewees note, although social media can be very democratizing, being able to harness it to its full potential can be difficult for those without the funds to sustain the overhead costs, the

[36] Anecdotes from interviewees but also referred to throughout *"Canada's communications future: Time to act"* by Broadcasting and Telecommunications Legislative Review Panel, January 2020.

technical skills, or the time. One survey respondent suggested the need for, "a dedicated online Canadian comedy streaming site." If not realistic, perhaps there could be initiatives for Canadian streaming sites to dedicate more focus to comedy, in the vein of Netflix's commitment to the genre through marketing campaigns and original content investments.

Nordicity

4. Comedy Content Industry Perspective

This section provides an overview of another part of the comedy content creation eco-system, that is to say production companies (screen and audio content), broadcasters and venues. The insights in this section are mainly derived from the literature scan, survey responses and interviews with industry representatives.

4.1 Companies in the Ontario Comedy Eco-System

The company or industry participation in the online survey ranged between 14 and 24 comedy content production companies (e.g. television production, comedy audio recordings, etc.) responding to each question. As such, the quantitative analysis presented in this subsection cannot be considered to represent the overall population of Ontario's comedy content production companies. It is presented below mainly to characterize the survey sample cohort before the discussion barriers and opportunities.

Some 21 companies of wide-ranging sizes provided information on comedy project budgets and revenue.

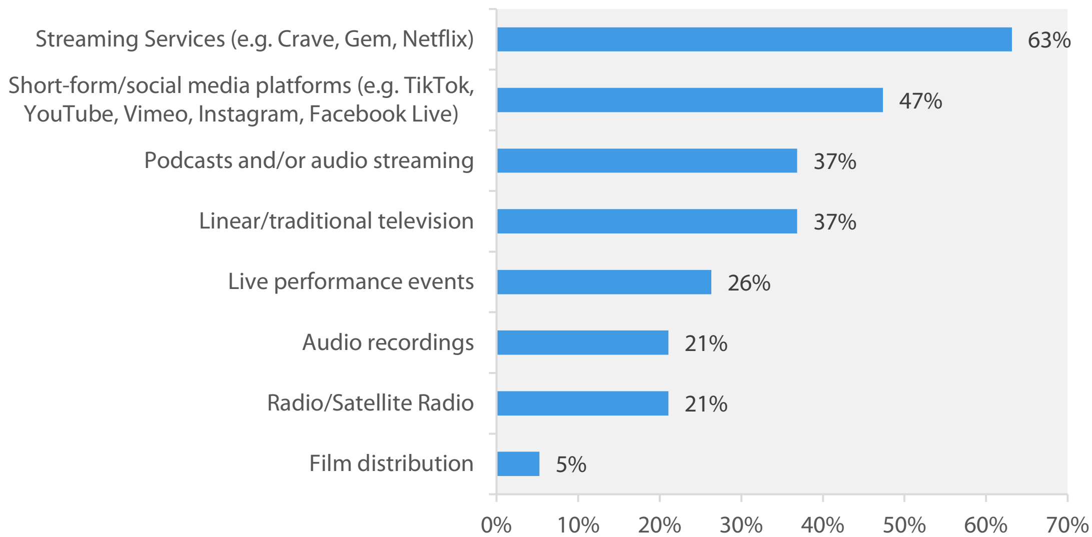
- Based on the total annual production budgets for all comedy related projects, we can estimate that each company has some **$437,000** in comedy-related productions taking place per year.[37]
- Of that total production slate/value, companies reported having a vested IP ownership stake of roughly **83%**.
- On average, the annual earnings or revenue from producer fees, sales and distribution of comedy-related produced media was **$12,000**.
- Of total earnings, approximately a third (**32%**) was derived from foreign sales and distribution sources (Interviewees suggested the range was closer to **15-20%**).

According to interviewees, the international marketplace is critical to the viable exploitation of comedy content on produced media. Without foreign financing upfront or international sales downstream, many producers would be "working for free." As a result, producers are constantly finding the balance between content that will succeed in Canada and also resonate internationally. The ultimate goal, according to one producer, is to create world-class Canadian content with high production values that can compete in a global market.

When asked to select the platforms that held the greatest potential for growing the company's revenue from comedy content, the results were as follows:

[37] Outliers were excluded from the average deal value calculations. The gross value of deals was calculated as a product of average value of deals for surveyed companies and the total number of companies in the universe less the number of outliers, added to the outlier deal values.

Figure 26: Platforms with greatest potential for production company revenue growth on comedy content



n=19
Source: Nordicity Survey to Comedy Content Creators 2020

- Unsurprisingly, streaming services such as Crave, Gem and Netflix are perceived to hold the strongest growth potential for comedy content production companies. Producers described these platforms as enormously important to the financial scenario of a comedy content property explaining that more customers and more distribution windows means more sales potential.
- Audio is emerging as a medium to monitor with more than a third of companies indicating that podcasts and audio streaming have growth potential and one in five companies pointing to audio recordings as growing.
- Notably, the more traditional comedy platforms such as live events (26%) and linear television (37%) are still vital for comedy content creation companies.

4.2 Barriers and Opportunities for Success

Respondents answering on behalf of a comedy content production company were asked to select the top three barriers to success for their company when it comes to their ability to develop, produce, and generate revenue from comedy content. The top results, based on a sample of 19 companies, are presented in the icons below. The chart showcasing the full set of responses are presented in Appendix A and B.

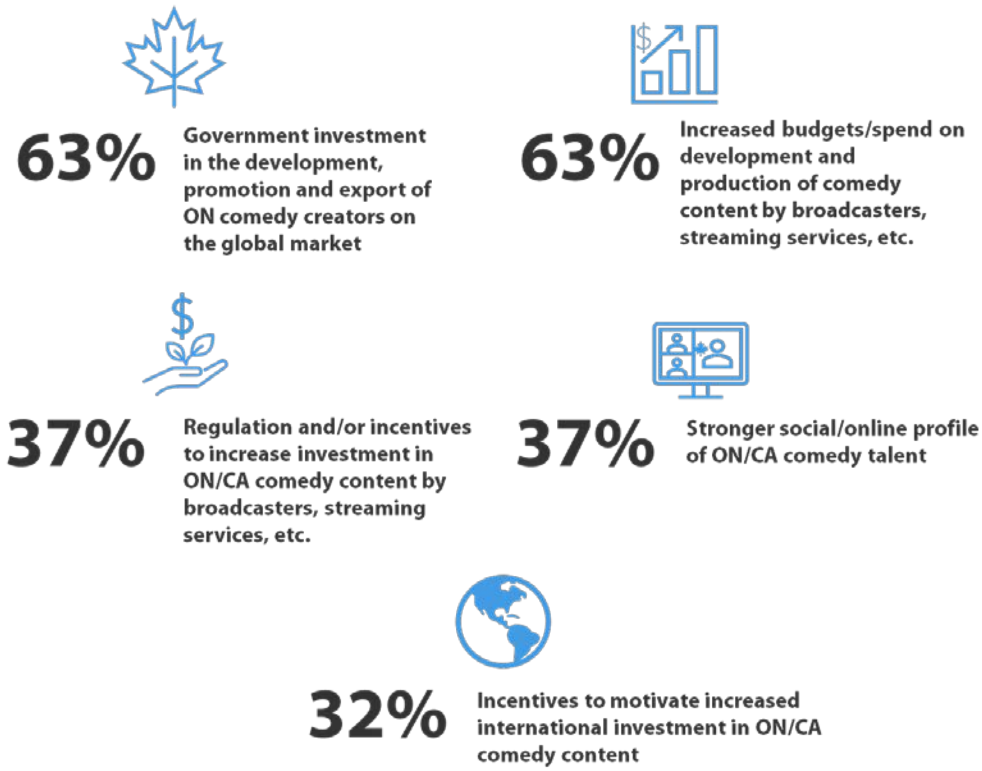
Figure 27: Main barriers to success for companies' ability to develop, produce and generate revenue from comedy content

n=19
Source: Nordicity Survey to Comedy Content Creators 2020

- As with the individual responses, the top barrier felt to be limiting comedy content production companies, was lack of government support. While production companies can access the full gamut of tax credits and Canadian Media Fund support, they nonetheless perceive comedy to be under-supported by government.
- Similarly, the second barrier, low marketing budgets/supports, echoes the individual responses, as far as lack of showcase opportunities. Production companies want their properties to be supported and promoted widely, but comedy shows may not always receive the same promotion level as news and drama.
- The lack of domestic demand for comedy speaks in part to the challenges of celebrating Canadian comedy content creators and prioritizing Canadian comedy over American voices.
- Other barriers mentioned by companies were: i) prevalence of American or other foreign content on Canadian-owned channels/platforms/services (32%) and ii) low digital/social profile of ON's comedy performers/writers (21%)

Respondents were asked to select the top three opportunities that, if seized, would have the strongest impact (directly or indirectly) on their company's ability to develop, produce and generate revenue from comedy content. The top results are presented in the icons below.

Figure 28: Top opportunities for developing, producing, and generating revenue from comedy content



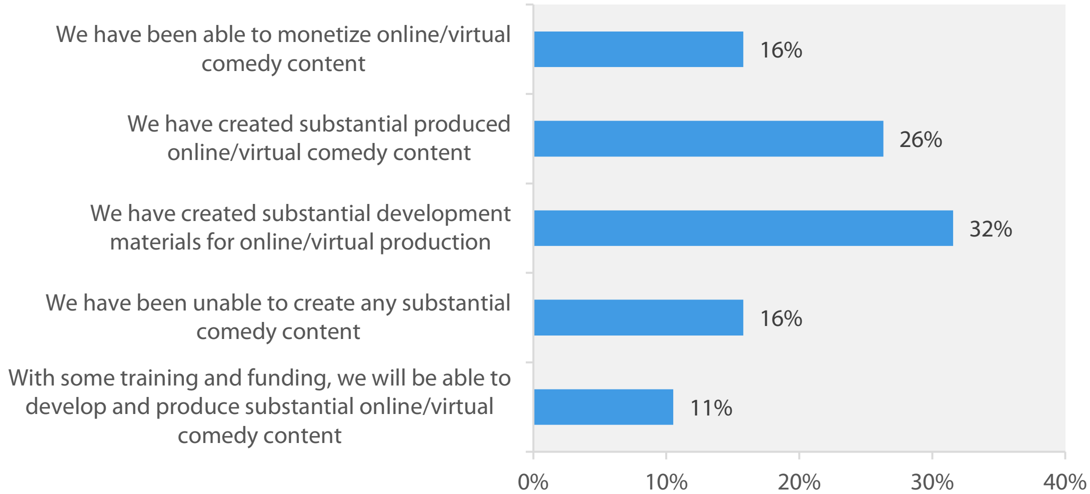
n=19
Source: Nordicity Survey to Comedy Content Creators 2020

- Opportunities for growth for companies strongly related to the barriers with 63% of companies pointing to public investment in the development, promotion and export of Ontario's comedy content as a key opportunity alongside increased budgets. The consensus amongst interviewees was that more investment or capital is required to grow the sector.
- International exposure or investment in export opportunities is another theme emerging, with a third of companies suggesting greater incentives to motivate increased international investment in content from Ontario/Canada comedy performer/writers (32%).
- Stronger online promotion, selected by 37% of companies, speaks somewhat to the lack of showcase opportunities highlighted by individual respondents. Online promotion can be a major factor in breaking through to audiences and developing demand for more content.
- One company response summed up the basket of challenges with this statement, "CBC Gem as a streaming service needs to go international and make itself available on American and international soil. Gem has been creating lots of good original digital programming, but it is stagnant if it just sits in Canada. Their marketing budget is very low."

Within the context of COVID-19 industry shutdowns, respondents were asked to select the option that best describes their company's opportunities to create comedy content on online/digital media platforms. The results are presented in the chart below.

Nordicity

Figure 29: Opportunities to create comedy content online as a result of COVID-19

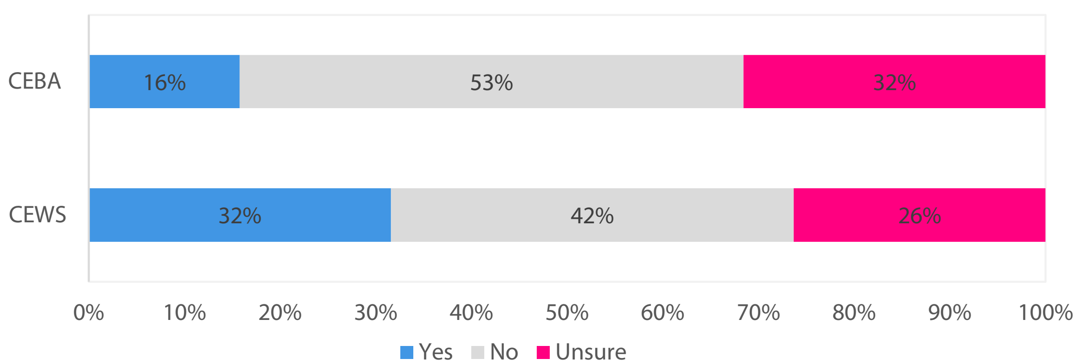


n=19
Source: Nordicity Survey to Comedy Content Creators 2020

- Roughly a third of respondents indicated that their companies were able to *create* substantial development materials for online/virtual productions, as a result of COVID-19 related industry shutdowns, but just one in six (16%) were able to monetize that content.

Survey respondents were asked if their company was eligible to for the Canada Emergency Business Account and/or the Canada Emergency Wage Subsidy (CEWS) during COVID-19. The results are presented in the chart below.

Figure 30: Company eligibility for CEWS & CEBA

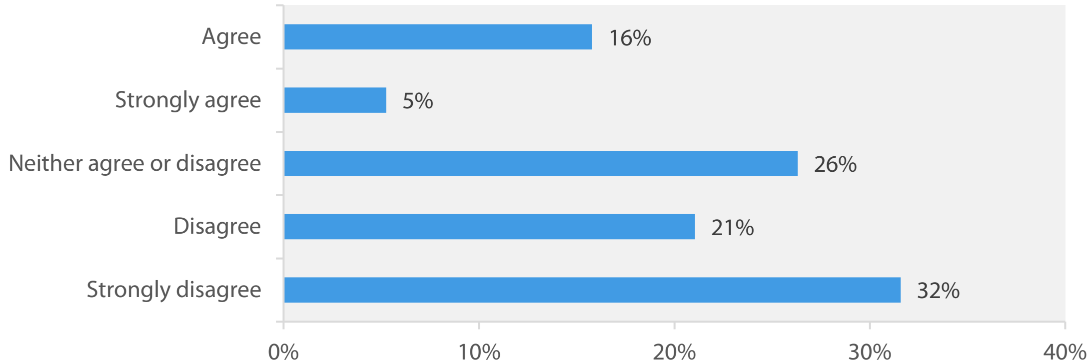


n=19
Source: Nordicity Survey to Comedy Content Creators 2020

- By July about 32% of companies were eligible for CEWS and about one in six were eligible for CEBA.

Survey respondents were asked to indicate their agreement level with the following statement: "In the context of COVID-19 government support measures for the culture sector, independent production companies have been given adequate financial support." The results are presented in the chart below.

Figure 31: "Government financial support measures for the culture sector, independent production companies has been adequate amid COVID-19…"

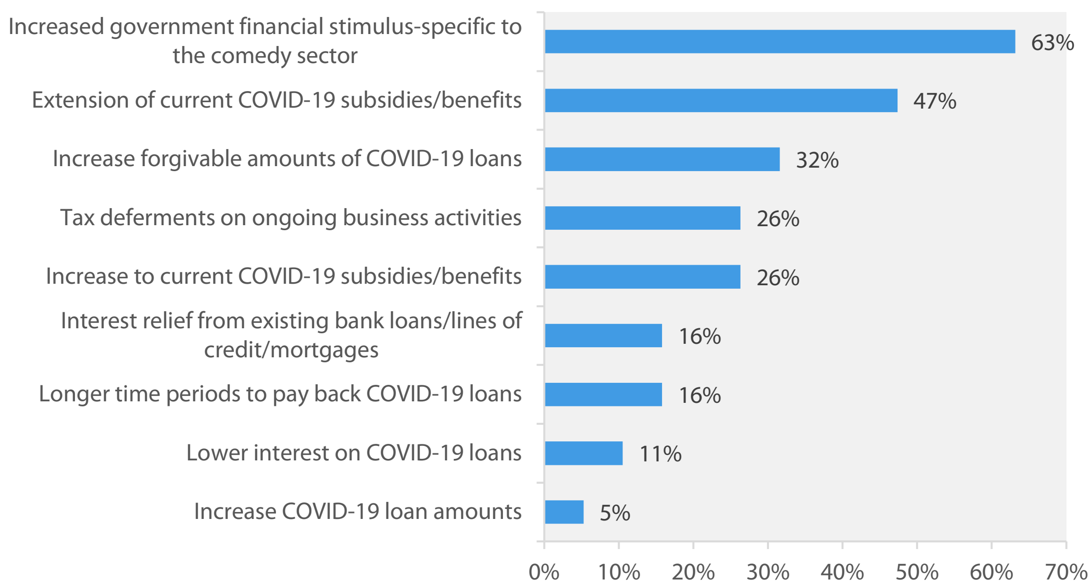


n=19
Source: Nordicity Survey to Comedy Content Creators 2020

- In July, over half of the companies responded that they disagreed or strongly disagreed that support for production sector had been adequate. Further initiatives have been introduced since this questionnaire so it may not be the case today.

The chart below illustrates the top three financial support measures that would help companies prepare for a strong recovery from COVID-19 in the upcoming months.

Figure 32: Financial support measures that will support COVID-19 recovery



n=19
Source: Nordicity Survey to Comedy Content Creators 2020

- The highest share of respondents, some 63%, indicated that increased government financial stimulus-specific to the comedy sector would help them recovery post-COVID-19.

5. The Canadian Comedy Content Creator Value Chain

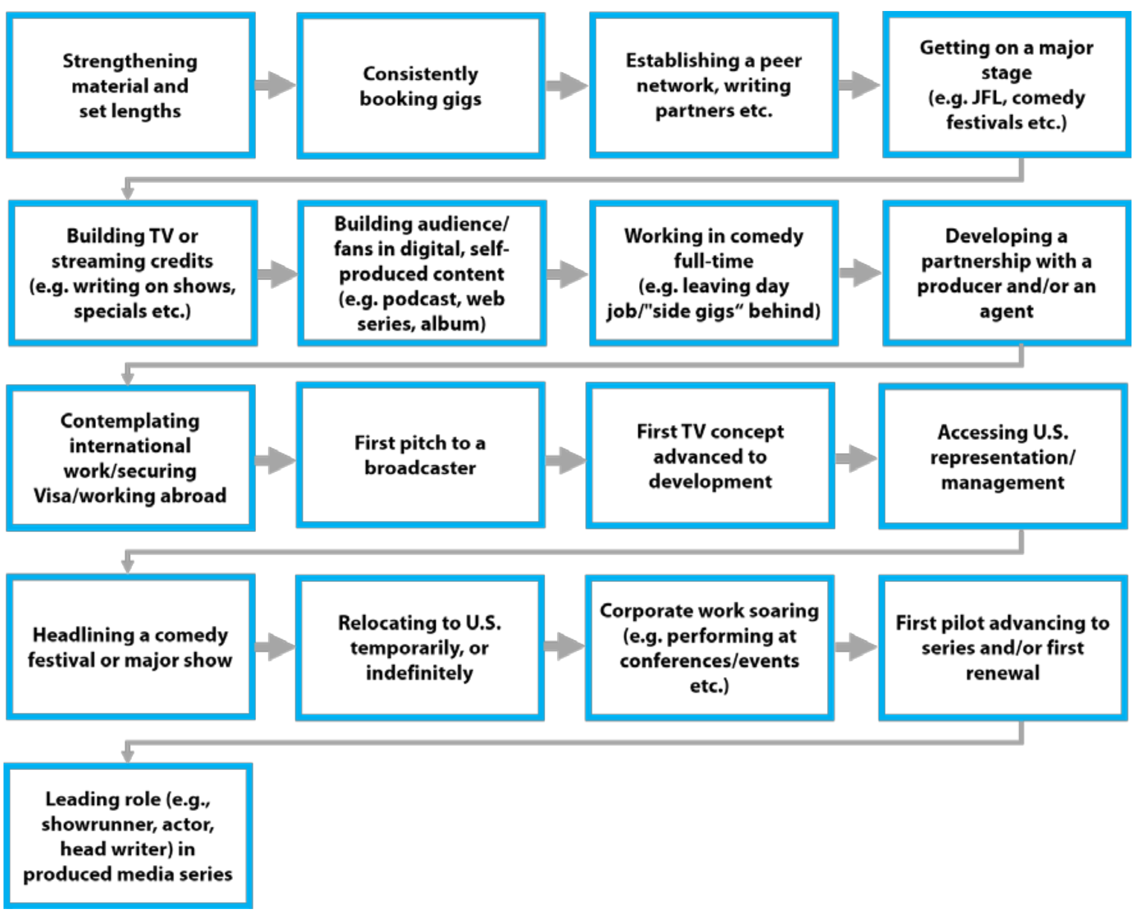
One objective of this profile was to better understand the value chain for comedy content creators. In other words, mapping the critical value-adding activities and roles from ideation to consumption. In this section we identify the comedy content creator career milestones and compare two creative industry value chains with that of produced media comedy content.

5.1 Comedy Content Career Milestones

Through consultations, it was evident that the comedy content creator career path is filled with setbacks and successes alongside an enormous degree of risk to bear on the part of the creators. As one producer described it, success in produced media comedy (for both individual creators and companies) is a series of "small incremental steps" towards the ultimate goal of a lead role in a produced media series, or the renewal of a series. Success in comedy cannot be measured conventionally, in a linear arc. On the way to achieving that ultimate goal, be it in front of the camera, or behind the scenes, certain critical milestones were cited as representing momentum toward a more sustainable career in comedy content creation.

The figure below attempts to loosely chart these milestones. While the image may give the suggestion of a linear path, in fact it is more like a game of snakes and ladders. At any stage, creators may return "to the drawing board" and start the process again. Similarly, not every one of these milestones will be reached or needs to be achieved in order to have a successful career.

Figure 33 Comedy Content Creator Milestones



One pivotal and elusive milestone was described as when the income split –between one's "day job" and comedy earnings – shifts towards comedy. Suddenly one will realize that "comedy is paying your bills." At this stage creators will face the decision of whether to shift towards comedy content creation full-time and drop the security of a side-gig. When asked "at what point did you feel you had achieved success", Vance Banzo of *TallBoyz* describes the moment, "when we got the yes in the CBC room and we were handshaking congratulations" and Guled Abdi says, "When I could pay my bills with comedy."

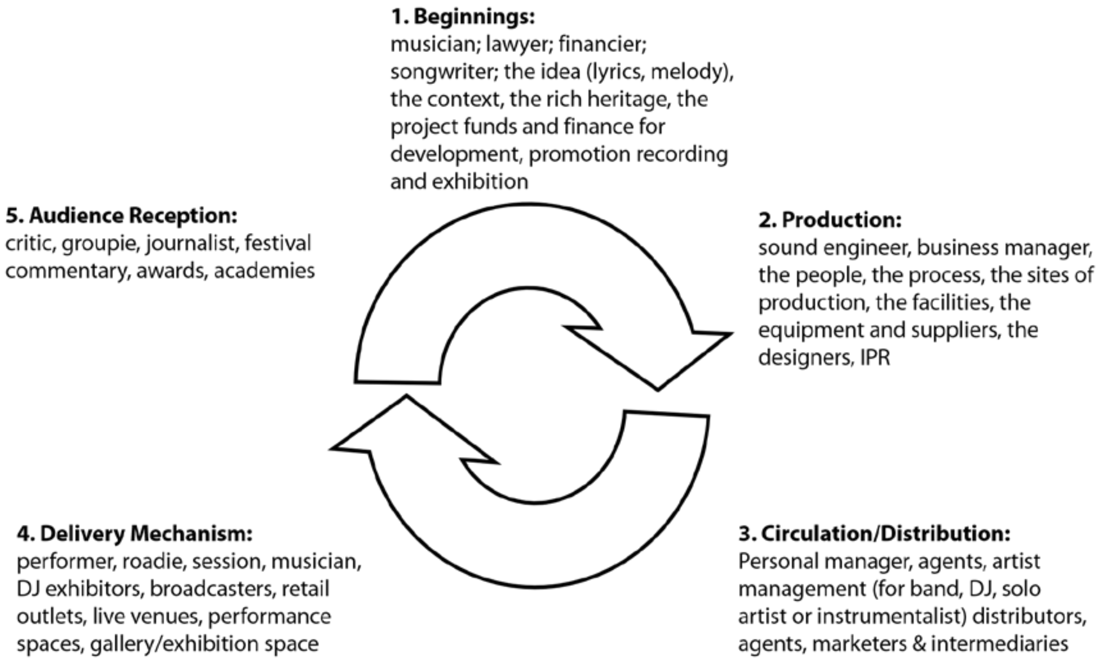
Importantly, interviewees refuted the image of an artificially upward trajectory. In Canada, comedy creators explained, one is constantly proving oneself, whatever successes or achievements have been attained. All along the journey, creators are strengthening their content, skills and networks as well nurturing and reaching fans directly through digital and social followings. Overall, there were seen to be far too few opportunities for exposure and career growth for many to sustain their comedy careers in Ontario. As one television stakeholder interviewed remarked, "milestones are incredibly important, and in Canada we are lacking them."

5.2 Comedy Produced Media Content Value Chain

Time and again through consultations, interviewees and survey respondents pointed to the similarities between a comedy content creator's journey and that of a musician's, and similarly, between comedy content and musical content. One interviewee described the deeply personal nature of music to a musician, explaining that while an album is itself a product, it is one that sometimes cannot be untangled from the person performing it. For this interviewee, individual comedy content creators (mainly stand-up performers) were often even *more* exposed than musicians, because they perform and tour without the support of the band around them and they have so little access to support. Examining and strengthening the unique nature and gaps in the comedy value chain, in this context, should help uncover new approaches for supporting and growing the sector.

In UNESCO's *Introduction to the Value Chain* from its Section for the Diversity of Cultural Expressions, it described the value chain for the cultural and creative industries as including five stages, 1) Creation; 2) Production; 3) Dissemination; 4) Exhibition/Reception/Transmission; 5) Consumption/Participation. The paper goes on to present the following simplified value chains for music and film and television, showcasing the key roles adding value at each stage, as well as the cyclical rather than linear nature of the creative/cultural value chain:

Figure 34 Music Value Chain



Source: Avril Joffe, UNESCO, Introduction to the Value Chain

The music value chain above demonstrates the critical nature or role of live performance as fueling downstream opportunities in the music industry – as it does in comedy. For musicians, live performing is an essential part of their career progression (maturing as an artist), discoverability and eventually (for the bigger stars) revenue.[38] Performances at festivals and notable venues can reach beyond in-person audiences to digital listeners and viewers on various streaming platforms. This exposure can raise the chance of being signed by a record label.[39] These attributes are similarly true for comedy creators that depend on live performances to: test material, build a stage presence and connect with audiences early on, and well into, their careers.

Many current Canadian comedy successes in produced media, began life on stage whether as a play as is the case with *Kim's Convenience*, or sketch shows and individual stand-up bits such as *TallBoyz, Kids in the Hall* and *Mr. D.* That being said, as comedy content makes its way through from live to produced media it behaves very much as other film and television content – with similar stakeholders adding value at the time of production and distribution. For the Film and Television Value Chain, Joffe adds notations for supply and demand considerations as seen below:

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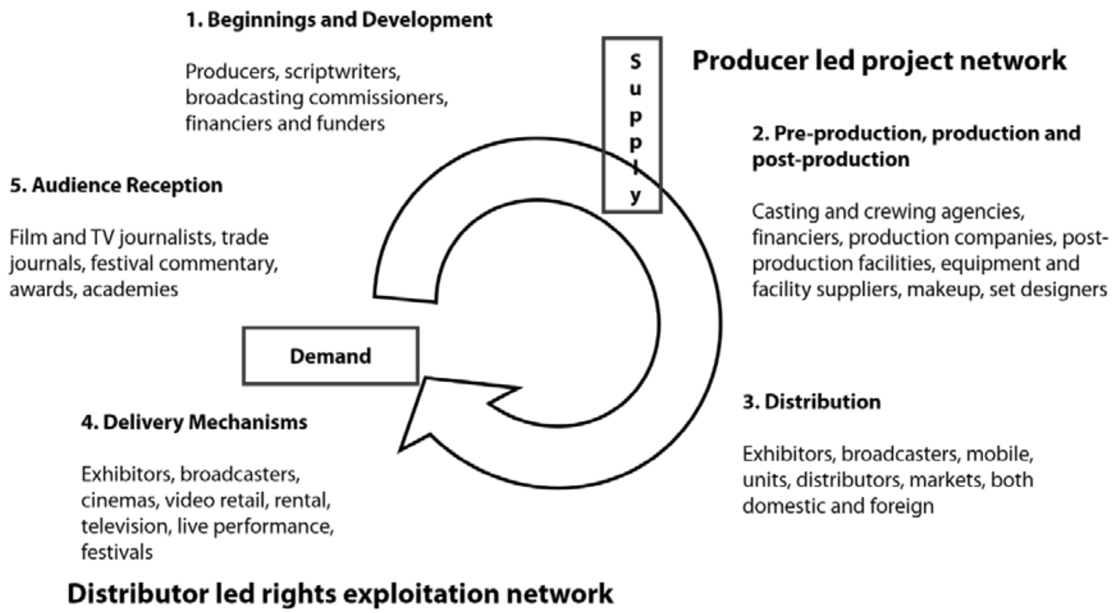
[38] Arakelyan, S et al. "Mining and Forecasting Career Trajectories of Music Artists." (May 2018) https://arxiv.org/pdf/1805.03324.pdf.

[39] Arakelyan, S et al. "Mining and Forecasting Career Trajectories of Music Artists," 2018.

Figure 35 Film and Television Value Chain



Source: UNESCO, Introduction to the Value Chain

The value chain above introduces, perhaps, how influential and powerful the producers and distributors are in film and television. It underplays, possibly, some of the direct-to-audience content via social media and video sharing platforms, which comedy content creators are adept at taking full advantage of.

Next, the project team considered how we would construct or characterize a preliminary value chain for comedy produced media, borrowing from these two models and the project team's research. The Comedy Content for Produced Media Value Chain (Figure 36) reflects how comedy content is created, starting with the comedy content creator at the independent level (Phase1: Creation/Ideation) and ending with a piece of produced media that is distributed to an audience (Phase 5: Audience Reception).

The value chain mirrors the cycle of creation, similar to that of the film/television and music value chains. It Includes the kinds of activities or processes that may or may not occur at each phase. The activities may be completed by the comedy content creator themselves or by other players, or stakeholders. It also includes some of the players (separate from the comedy content creator) and examples of stakeholders, who play a role in the overall success of the comedy content creator, their material and content at each phase. The value chain also includes the barriers associated with each phase, which represent the challenges that hinder the comedy creator's career growth and their content's success. Throughout this report we have also identified a set of core barriers and opportunities that exist in the comedy content creation eco-system in Ontario (See Section 3). In summary the most pressing barriers identified are a lack of the following:

1. Access to public support (Subsection 3.2) and appropriate remuneration (Subsection 3.2.1)
2. Access to showcase opportunities (Subsection 3.3)
3. Stakeholder support of "star system" tools to better engage audiences (Subsection 3.3.1)
4. Addressing discrimination and challenges stemming from a lack of diversity (Subsection 3.4)
5. Access to international markets (Subsection 3.5)

6. Access to supportive networks (Subsection 3.6)
7. Access to digital opportunities and digital distribution (Subsection 3.7)

These gaps are contributing factors to the loss of opportunities to develop comedic talent and content, and job retention. Some, such as addressing discrimination and challenges stemming from a lack of diversity, and access to supportive networks, underpin the comedy industry eco-system as a whole.

Figure 36 Comedy Content for Produced Media Value Chain

PHASE	1. Creation/ Ideation	2. Production	3. Circulation /Distribution	4. Delivery Mechanism	5. Audience Reception
ACTIVITIES	Material development, self-financing, social media, demo/showcase reels, clubs, festivals, podcasts, touring, awards, hosting/emceeing, acting gigs, guest appearances	Meetings with production companies or comedy recording companies, meeting with broadcasters, pitching, negotiation, casting, writing, editing, filming, recording (albums or podcasts), post-production editing/refining	Meeting with distributors and/or broadcasters, marketing domestically and internationally, promotion, positioning, selling	Consumption via: streaming platforms, linear TV, digital platform, film circuits/festivals, radio, satellite radio, podcast app/platform	Social media buzz/shares, media attention/interviews, trade commentary, critical acclaim, awards
PLAYERS	Agents/managers, bookers, peers/colleagues, festivals, comedy clubs	Producers/production companies, writers, directors, broadcasters, record label	Distributors (domestic or foreign), marketers, broadcasters/stream-ing platforms, producers	Broadcasters, streaming platforms, audio platforms, etc.	Critics, fans, festivals, journalists, viewers
BARRIERS	Lack of Access to Public Support; Lack of Showcase Opportunities; Discrimination and Lack of Diversity; Lack of Supportive Networks; Lack of Appropriate Renumeration; Lack of Star System; Lack of Access to Digital Opportunities	Lack of Access to Public Support; Lack of Showcase Opportunities; Discrimination and Lack of Diversity; Lack of Supportive Networks; Lack of Appropriate Renumeration; Lack of Star System; Lack of Access to Digital Opportunities	Lack of Access to Public Support; Lack of Showcase Opportunities; Discrimination and Lack of Diversity; Lack of Supportive Networks; Lack of Appropriate Renumeration; Lack of Access to International Markets; Lack of Access to Digital Opportunities	Lack of Access to Public Support; Lack of Showcase Opportunities; Discrimination and Lack of Diversity; Lack of Supportive Networks; Lack of Star System; Lack of Access to International Markets; Lack of Access to Digital Opportunities	Lack of Showcase Opportunities; Discrimination and Lack of Diversity; Lack of Supportive Networks; Lack of Star System; Lack of Access to International Markets; Lack of Access to Digital Opportunities
STAKEHOLDERS	Second City, Yuk Yuk's, Absolute Comedy, Comedy Bar, TOsketchfest, Just For Laughs, etc.	Project 10 Productions, CBC, Bell Media, Netflix, Accent Entertainment, Just For Laughs, Comedy Records, etc.	CBC, Bell Media, Entertainment One, Netflix, Mongrel Media, Corus, Just For Laughs, Sirius XM, etc.	CBC Gem, Crave, Sirius XM, Netflix, Instagram, YouTube, Facebook, Apple Music, Apple Podcasts, Spotify, etc.	Local/national media outlets (e.g. etalk, Toronto Star, blogTO, NOW Magazine), international media outlets, social media, etc.

The value chain above highlights where comedy creators are most vulnerable when it comes to the creation of produced media and where additional supports are needed from the industry and its stakeholders.

6. Conclusion

This report is being assembled just as the cast of *Schitt's Creek* swept the Emmy awards. How can the next wave of comedy content creators be supported to achieve the same levels of success? From the perspective of the industry and its participants, a key opportunity for change is greater safety and public financial support for the creators in their precarious early career stages, greater support for accessing international markets with export, more opportunities to celebrate Ontario-based creators and leveraging the comedy content creators strengths in digital content creation and distribution. The strong survey participation, with more than 500 completed responses across Ontario, demonstrates in part the openness and appetite of the comedy content creator sector to be part of a larger, more formal and supportive community.

Enhancing the comedy content creator network with greater access to support, to training and to career development could create benefits across the arts and creative industries eco-systems, for example, as stronger content reaches film and television development stages. Interviewees recognize the demand for more diverse content and stories on screen, but to achieve that goal, those creators must be supported with meaningful career pathways and storytelling opportunities earlier in their careers.

Critical to the success of Ontario comedy content creators is access to resources to create content and get traction with audiences on the global digital media market. Limited spaces to perform and showcase, limited opportunities to get into development and production of produced media and the finite population of Ontario audiences make the value chain challenging for comedy content creators to work and remain at home. These barriers may result in Ontario not being as competitive as it could be for revenue from the global digital media market.

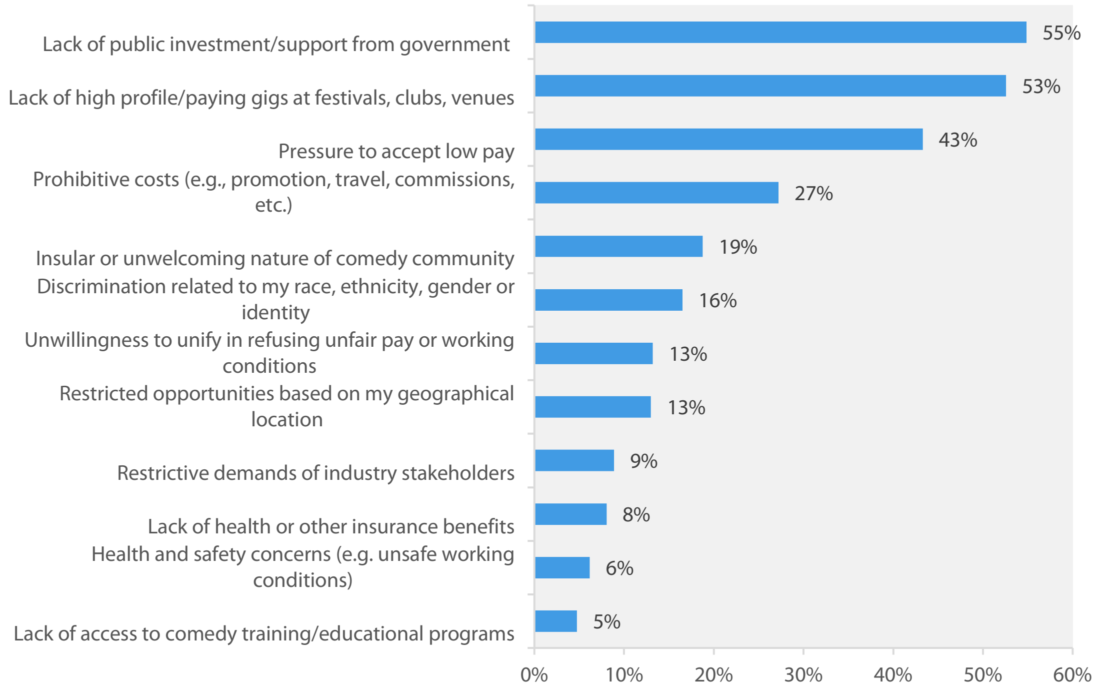
The profile, developed under CANCOM's leadership, provides a series of indicators from income to barriers that can act as a foundation to be built upon, in the coming years and through the industry's COVID-19 recovery.

This report is also being assembled as the province grapples with a second wave of COVID-19, likely eroding any live performance gains made over the summer and creating uncertainty across the creative industries. Despite the enormous challenges, the comedy content sector will undoubtedly be an ingredient in how Ontarians cope with isolation this winter.

Appendix A. Barriers to Success

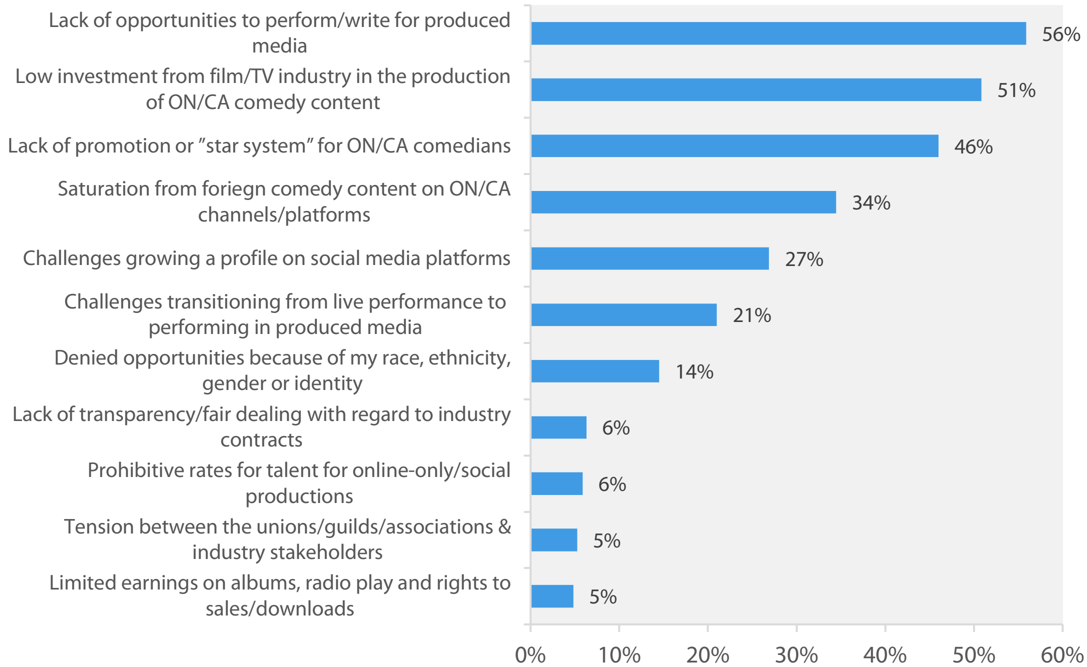
A.1 Comedy Content Creators

Figure 37: Barriers to success comedy content creator face in their overall career in comedy



n=485
Source: Nordicity Survey to Comedy Content Creators 2020

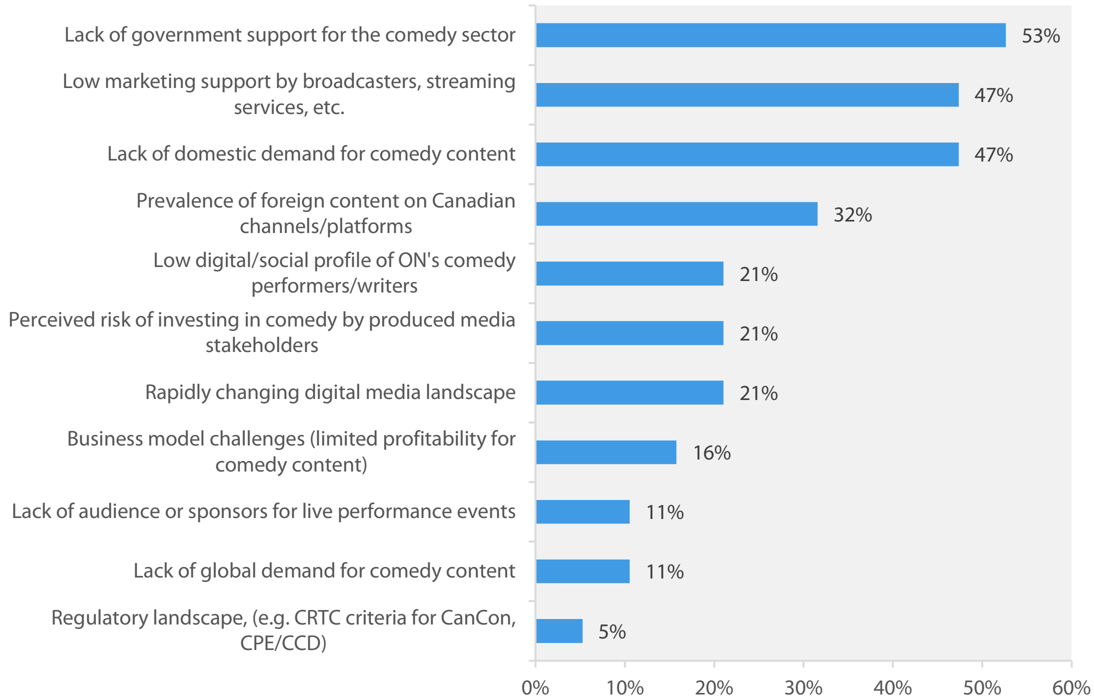
Figure 38: Barriers to success faced by survey respondents in their ability to make a living in produced media



n=476
Source: Nordicity Survey to Comedy Content Creators 2020

A.2 Comedy Content Companies

Figure 39: Barriers to success for companies to develop, produce and generate revenue from comedy content

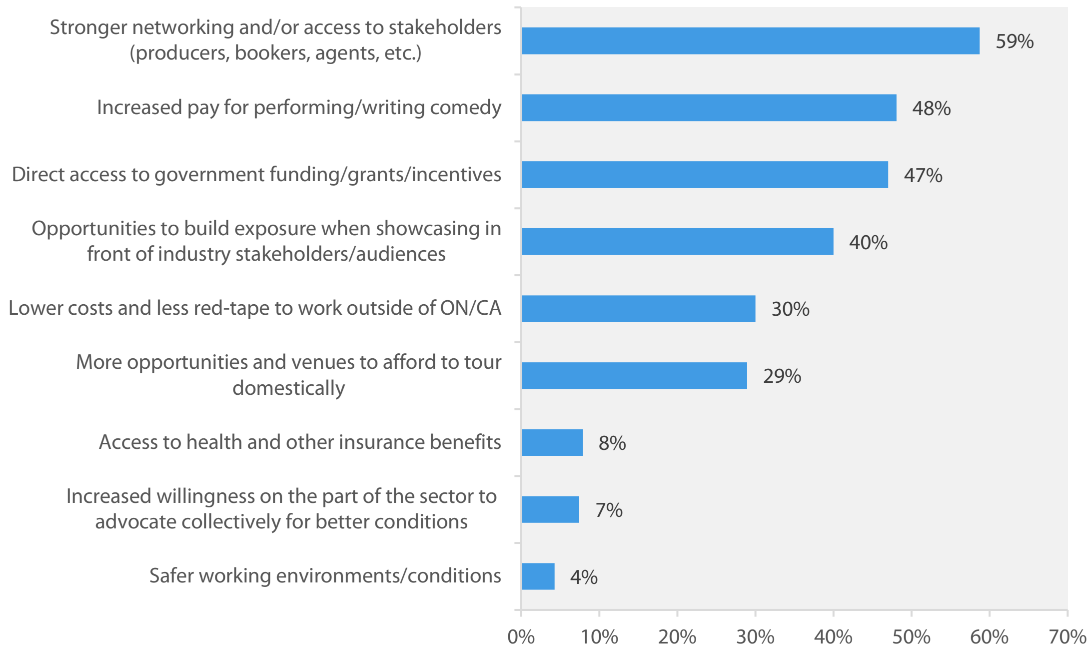


n=19
Source: Nordicity Survey to Comedy Content Creators 2020

Appendix B. Opportunities for Success

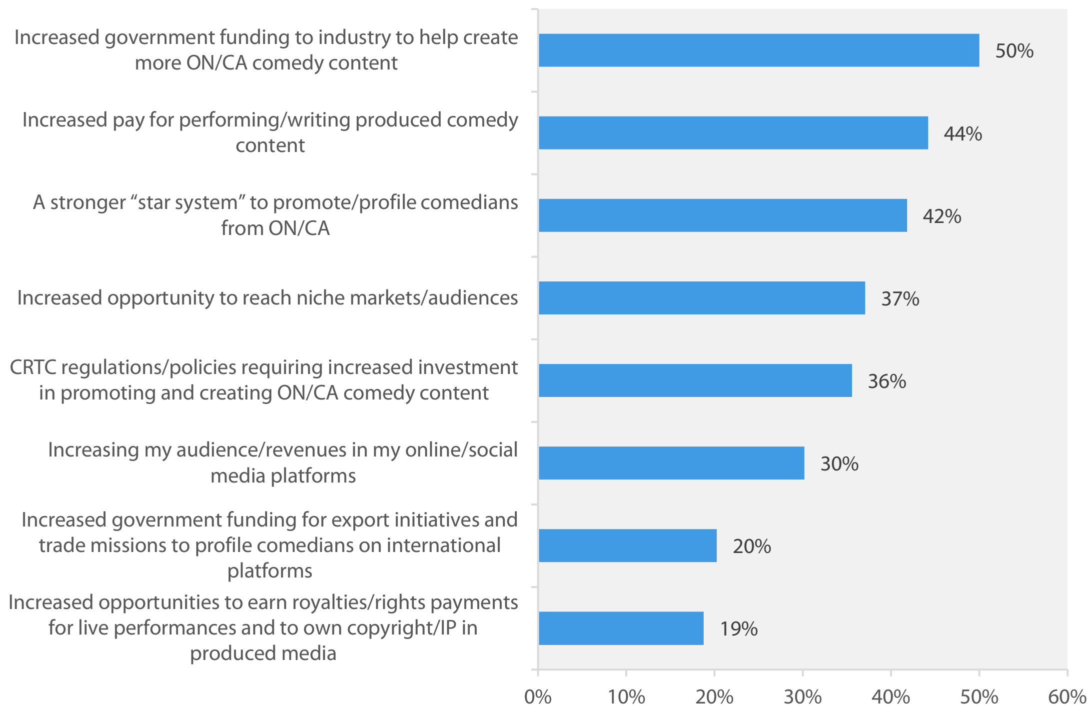
B.1 Comedy Content Creators

Figure 40: Most promising opportunities for overall future success in comedy



n=470
Source: Nordicity Survey to Comedy Content Creators 2020

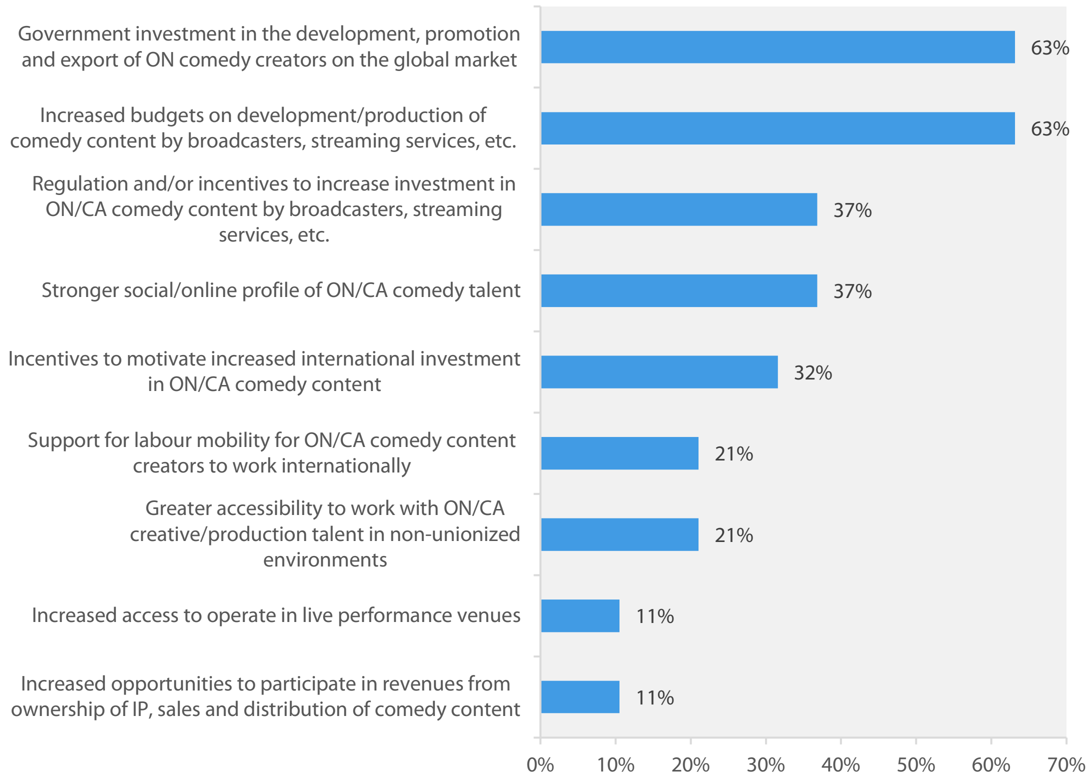
Figure 41: Most promising opportunities for making a living in comedy produced media



n=464
Source: Nordicity Survey to Comedy Content Creators 2020

B.2 Comedy Content Companies

Figure 42: Strongest opportunities for companies to develop/produce and generate revenue from comedy content



n=19
Source: Nordicity Survey to Comedy Content Creators 2020