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## List of acronyms and abbreviations

<b>ADM</b>	Assistant Deputy Minister
<b>ATP</b>	Aid to Publishers
<b>BI</b>	Business Innovation
<b>CI</b>	Collective Initiatives
<b>CPF</b>	Canada Periodical Fund
<b>DG</b>	Director General
<b>EBP</b>	Employee Benefit Plan
<b>ESD</b>	Evaluation Services Directorate
<b>FTE</b>	Full-time equivalent
<b>GBA Plus</b>	Gender-based analysis plus
<b>LGBTQ2S</b>	Lesbian, gay, bisexual, transgender, queer (or questioning), and two-spirited
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>OLMC</b>	Official Language Minority Communities
<b>O&amp;M</b>	Operations and Management
<b>PCH</b>	Canadian Heritage

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## Executive Summary

This document constitutes the final report of the evaluation of the Canada Periodical Fund (CPF). The CPF explores a range of activities that provide financial assistance to Canadian print magazines, print community (non-daily) newspapers and digital periodicals, to enable them to overcome market disadvantages and continue to provide Canadian readers with the content they choose to read.

The evaluation covers the period from 2015-16 to 2019-20 and focuses on the relevance, design and delivery as well as the effectiveness of the program. It is based on a document and literature review, administrative data review, and key informant interviews.

## Relevance

The evaluation indicates that the CPF is a critical component of the overall support provided by the federal government to the periodical industry, particularly to paid print magazines, print community (non-daily) newspapers and digital periodicals, in an increasing presence of digital periodicals. Through stable funding support of approximately \$75 million annually, the program addresses important needs of its targeted beneficiaries, playing a critical role in ensuring that Canadians have access to relevant and diverse Canadian content.

PCH began a modernization process that is expected to better align the CPF program with the current realities of the magazine and community newspaper industries. The industry is facing major challenges due in part to declining advertising revenues and distribution in an increasingly digital marketplace. The modernized CPF prioritizes activities that lead to the production of quality Canadian editorial and journalistic content, regardless of the platform used. To help publishers adapt to the changes in the program, the modernized CPF is being implemented over a five-year period.

## Design and delivery

Overall, the CPF benefits from a well-established program delivery structure. However, at the time of the evaluation, the program had not yet implemented an online application process, and the intake cycles led to administrative resource challenges throughout the years. The PCH online modernization process and the implementation of two intake periods for the ATP applications are expected to address some of these challenges. The program is expected to be integrated into the department's online process in 2022-23.

The CPF has also built a robust performance measurement strategy, which provided detailed information on program reach. This supports the ongoing management of the program and may serve as the foundation for a gender-based analysis plus (GBA Plus).

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## Program effectiveness

The ATP component was successful in providing meaningful support to a large portion of eligible organizations. However, the Canadian magazine and newspaper industries face several challenges including decreases in advertising revenue, the difficulty for magazine publishers to maintain both print and digital operations, challenges in monetizing digital content, and increased competition from other industries and new competitors.

The Business Innovation (BI) and Collective Initiatives (CI) components provide complementary support, including an increasing level of participation from digital periodicals. At the time of the evaluation, the BI component was operating with a broad definition of what constitutes innovative projects. The programs implemented in other countries that are documented in this report illustrate the range of innovation approaches that may assist magazines and community newspapers, to adapt to the shifting environment in which all media operate.

## Government-wide considerations

At the time of the evaluation, the CPF had yet to formally integrate a GBA Plus into its ongoing program management. Notwithstanding, PCH recently undertook an informal GBA Plus of the CPF which found that, while the CPF's impact is gender-balanced, it directly targets certain groups. The modernization process is expected to further improve access to content for audiences living in remote areas where broadband is available but physical distribution is costly.

## Recommendations

In light of the findings described in this report, and to support the ongoing management of the program, the evaluation recommends that the Assistant Deputy Minister, Cultural Affairs Sector:

- Recommendation 1:** Explore options and implement new approaches within the Business Innovation component to maximize the opportunities for recipients to innovate in changing market conditions.
- Recommendation 2:** Undertakes the completion of a gender-based analysis to further ensure the CPF program is aligned with the emerging needs and preferences of diverse groups.

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## 1. Introduction

This document constitutes the final report of the evaluation of the Canada Periodical Fund (CPF). It explores a range of questions related to the relevance, design and delivery, as well as the effectiveness of the program. It also considers government-wide priorities, particularly as it relates to gender-based analysis plus (GBA Plus). The evaluation covers five fiscal years, from 2015-16 to 2019-20.

The evaluation is intended to provide the Canadian Heritage (PCH) senior management with information to support decision-making about the program. The evaluation was conducted in accordance with the requirements of section 42.1 (1) of the *Financial Administration Act* and the Treasury Board Secretariat's Policy on Results.

The following sections provide a profile of the CPF and the methodology used to assess this program, a summary of the evaluation findings, conclusions and recommendations. The evaluation framework is included in Annex 1.

## 2. Program Profile

### 2.1. Overview

The federal government has a long history of providing assistance to magazines and community newspapers, recognizing the range of social, cultural and economic benefits that they provide. Such assistance has typically been focused on the need to offset high distribution costs and competitive disadvantages facing Canadian print magazines, print community (non-daily) newspapers and digital periodicals. In this context, PCH implemented the CPF in 2010-11, which at the time was replacing two earlier support programs: the Canada Magazine Fund and the Publications Assistance Program.

Using grants and contributions, the CPF supports the activities of Canadian magazine and community newspaper publishers and organizations to ensure that Canadians have access to diverse Canadian print magazines, print community (non-daily) newspapers and digital periodicals. It includes the following three components:

1. Aid to Publishers (ATP), which provides annual formula funding based on copies sold or circulated to Canadian print magazines, print community (non-daily) newspapers and digital periodicals, to support publishing activities, such as distribution, content creation, online activities and business development. Eligible organizations apply once a year.
2. Business Innovation (BI), which provides funding to Canadian print and digital magazines, for business development and innovation projects.<sup>1</sup> Applications are accepted on an ongoing basis,

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<sup>1</sup> The CPF defines innovation as “the adoption or use of new technologies but can also involve changing your business model or adapting to changes in your environment, to deliver better products or services. Innovation generally refers to changing or creating more effective processes, products or ideas, to increase productivity, performance and sustainability ” (Canadian Heritage, 2020d).



and funded projects may be implemented over a period of up to two years.

3. Collective Initiatives (CI), which provides funding to Canadian paid magazines and community newspaper organizations for industry-wide projects to increase the overall sustainability of the Canadian print magazine, print community (non-daily) newspaper and digital periodical industries. Applications are accepted on an ongoing basis, and funded projects may be implemented over a period of up to three years.

The program falls under the responsibility of PCH’s Cultural Industries Branch, and the Periodical Publishing Policy and Programs directorate is responsible for its overall delivery and ongoing management.

The process to allocate funding includes annual calls for applications to eligible organizations in accordance with established guidelines. These applications are reviewed by the CPF program staff, and each program component applies specific criteria to assess the application and provide funding as applicable. In the case of the ATP (the component with the largest budget), the funding is largely distributed proportionally according to the number of eligible copies distributed by each recipient, while also considering other factors such as the circulation business model. Some target groups such as Indigenous, ethnocultural, LGBTQ2S and Official Language Minority Communities (OLMC) publications, benefit from more flexible eligibility criteria and greater weighting in the formula, which means that they receive more money per copy sold or distributed compared to other types of publications.

## 2.2. Resources

Table 1 shows the actual financial resources associated with the CPF during the period covered by the evaluation.

**Table 1: CPF financial resources (total direct cost), 2015-16 to 2019-20 (\$ million)**

Financial resource	2015-16	2016-17	2017-18	2018-19	2019-20
Salary and EBP	\$3.6	\$3.2	\$3.4	\$3.6	\$3.4
O&M	\$0.1	\$0.2	\$0.2	\$0.1	\$0.2
Grants	\$69.8	\$70.1	\$67.6	\$70.7	\$71.3
Contributions	\$3.2	\$4.2	\$7.2	\$3.7	\$4.0
<b>Total*</b>	<b>\$76.7</b>	<b>\$77.8</b>	<b>\$78.4</b>	<b>\$78.1</b>	<b>\$78.9</b>

\*Number may not add up due to rounding.

Source: PCH administrative data

As indicated in Table 2, the total number of full-time equivalent (FTE) allocated to the delivery of the CPF has decreased during the period covered by the evaluation, from 44.1 to 36.5 FTEs in 2019-20.

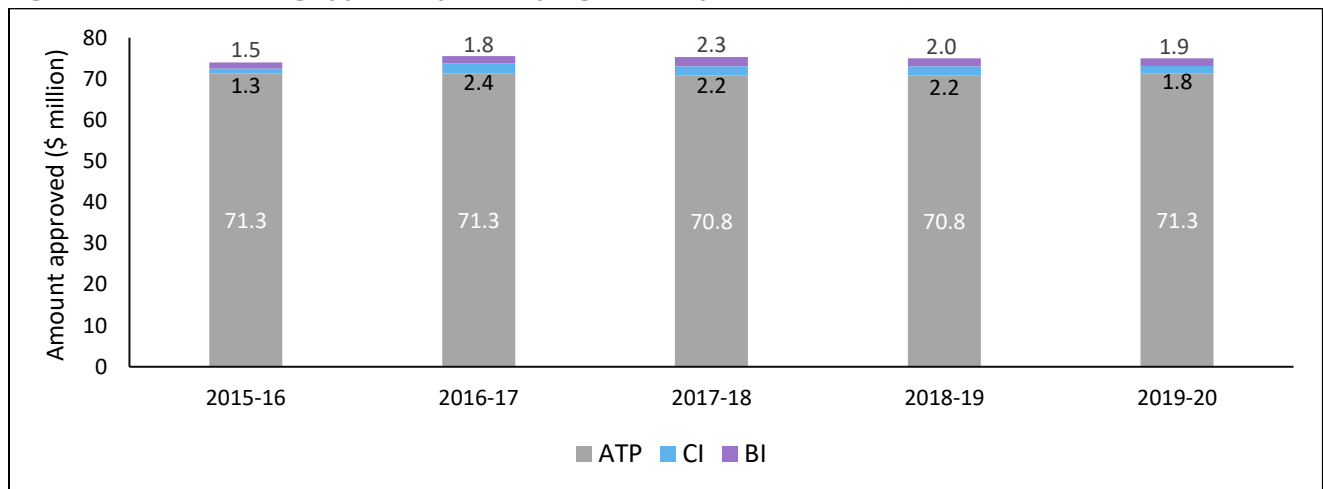
**Table 2: CPF full-time equivalents (FTE), 2015-16 to 2019-20**

Resources	2015-16	2016-17	2017-18	2018-19	2019-20
FTEs	44.1	39.8	36.7	36.9	36.5

Source: PCH administrative data

Of the three components, by far the largest investment of the CPF was directed toward the ATP, as illustrated in Figure 1.

**Figure 1: Annual funding approved per CPF program component (\$ million)**



Source: PCH administrative data

## 2.3. Previous evaluation and resulting program changes

### The 2015 evaluation of the CPF

The first evaluation of the CPF occurred in 2015 and covered a five-year period, from 2010-11 to 2014-15. It concluded that the CPF was relevant, particularly considering the “increased competition from digital sources for advertising revenue, decreasing print circulation figures, rising distribution costs, and attempts to devise and transition to profitable models of digital distribution and readership”.<sup>2</sup>

The evaluation also concluded that the program was contributing to its expected outcomes. It had “provided a substantial, and sometimes critical, amount of funding through ATP to more than 800 titles each year” to offset increasing business costs or to undertake new activities such as developing their digital presence. The BI component had funded over 200 projects “that have helped recipients achieve specific, targeted outcomes like increasing their digital presence and digital advertising revenues, developing skills and building knowledge, hiring staff, and increasing capacity for business development and innovation.” Finally, the CI component had supported almost 100 projects to “organizations that

<sup>2</sup> Canadian Heritage, 2015, p. 39

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promote industry-wide knowledge sharing and sustainability initiatives”, which has contributed to professional development and intra-industry cooperation.<sup>3</sup>

The evaluation included six recommendations related to a review of the formula funding approach and eligibility criteria for the ATP component, a review of processes to implement greater administrative efficiencies in the ATP and BI components, greater engagement with program stakeholders, an improvement of performance measurement information, and a review of the program's logic model. All six recommendations were addressed and fully completed by March 2018.

### **Recent changes to the CPF**

In February 2020, and partly in response to the evaluation and other inputs received, PCH undertook a process to modernize the CPF “by prioritizing activities that will lead to the production of quality Canadian editorial and journalistic content, regardless of the platform used to offer it”.<sup>4</sup>

ATP and BI are the two components of the CPF that will be modernized over a five-year period, to help publishers adapt to the proposed changes. The key changes are:

- For the ATP, to reward investment in editorial and journalistic content, and ability to reach readers, instead of focusing almost exclusively on print circulation. Also, starting in 2021-22, the ATP component will include a subcomponent for digital-only periodicals. The changes will be implemented gradually over a five-year period beginning in 2021-22 and ending in 2025-26.
- For the BI component, to allow for a broader range of periodicals to apply instead of focusing on small and mid-sized magazines. Also, the allocated budget of this component will be raised from \$1.5 million to \$2.5 million. Changes will take full effect in 2021-22.<sup>5</sup>

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<sup>3</sup> Canadian Heritage, 2015, p. 40

<sup>4</sup> Canadian Heritage, 2020c

<sup>5</sup> Canadian Heritage, 2020c

## 3. Evaluation methodology

### 3.1. Evaluation scope

The evaluation was conducted jointly by PCH’s Evaluation Services Directorate (ESD) and an external contractor. As a result of the modernization process, the evaluation was calibrated to ensure that it provided relevant insights that could effectively support the program moving forward. In particular, the evaluation primarily focused on the program’s relevance and the broader context in which magazine and newspaper organizations operated. The evaluation also included some assessment of the program’s activities and the modernization process underway.

### 3.2. Evaluation questions and methods

The evaluation addressed five key questions included in Table 3. Further details on the indicators, data sources and data collection methods associated with these questions can be found in the evaluation framework (presented in Annex 1).

**Table 3: Evaluation questions**

Issues	Evaluation Questions
Relevance	1. How is the CPF responding to the needs of the Canadian periodical industry?
Design and delivery	2. To what extent is the delivery of the CPF optimizing internal resources?
Effectiveness	3. How has the CPF assisted Canadian publishers during the evaluation period? 4. To what extent has the CPF enhanced the capacity of the Canadian periodical industry to appropriately adapt to emerging trends?
Government-wide policy considerations	5. To what extent has the management of the CPF integrated a gender-based analysis plus?

Three methods were used to address these evaluation questions:

- Documents and literature review: This task involved the review of recent key documents related to the CPF, including proposed changes to the program (for contextual purposes). Other documents reviewed included directives and procedures, and other operational information as applicable. Published literature was also considered, particularly as it related to strategies found in other jurisdictions to support similar stakeholders.
- Administrative data review: This task involved the review of all available administrative data on the activities of the CPF, including distribution of funding, number and distribution of recipients, and other relevant characteristics of the support provided by each of the three program components.
- Interviews: This task involved the conduct of five individual and group interviews with

program representatives and other PCH officials as required. Interviews with program recipients and external stakeholders were not conducted, as the program has been engaged with these groups as part of the modernization process. Also, the COVID-19 pandemic prevented further interviews from being conducted.

### 3.3. Evaluation limitations

The main challenges encountered as part of this evaluation were the limited analysis of program impact and the lack of consultation with program recipients and external stakeholders. Table 4 outlines these challenges and related mitigation strategies.

**Table 4: Limitations and mitigation strategy**

Limitation	Mitigation Strategy
Limited analysis of the program’s impact.	While the scope of the evaluation and the timeframe to complete it did not allow for a comprehensive analysis of the program’s impact, the data collection (particularly the administrative data analysis) allowed for an adequate description of the program’s contribution over the evaluation period. Also, the evaluation built upon the insights and findings of the previous evaluation conducted in 2015, with updated and complementary information.
No consultation with program recipients and external stakeholders.	The evaluation was fully contextualized and calibrated to consider the modernization process for the CPF. While this limited the overall scope of the evaluation itself, it did not limit the ability of the evaluation to address the questions and indicators described in this report.
The COVID-19 pandemic affected the data collection and timelines of this evaluation.	Data collection was limited to 3 lines of evidence collected prior to March 2020, and evaluation questions which could not be supported by the already collected data were removed from the analysis. The final report was delayed and ongoing consultation with the program ensured that current realities were considered in developing recommendations.

## 4. Evaluation findings

### 4.1. Needs addressed by the CPF

#### Evaluation question:

How is the CPF responding to the needs of the Canadian periodical industry?

#### Key finding:

The CPF provided flexible and stable funding to paid print magazines, print community (non-daily) newspapers and digital periodicals, in Canada, which was complemented by targeted funding for innovation and industry-wide initiatives. PCH adjusted the CPF to better address changing needs and the realities of the industry, particularly towards digital content. Through modernization, the federal government is attempting to balance the economic sustainability of the industry and the promotion of quality Canadian content.

#### The specific niche of the CPF

In every region of the world, and particularly among democratic societies, the media sector has been facing profound transformations. Alternative sources of information, declining subscriptions and melting advertising revenues have all contributed to what is largely seen as the collapse of the traditional journalism's economic model.<sup>6</sup> As the economic, social, and political repercussions of this media industry shake-up continue to unfold, all stakeholders attempt to preserve the fundamental mission of this industry.

In Canada, the federal government has introduced several measures to support Canadian news organizations. Over the past two years, in addition to the modernization of the CPF, it has implemented new income tax measures and the Local Journalism Initiative.<sup>7</sup> More recently, in response to the COVID-19 pandemic, the federal government added a Special Measures for Journalism component to the CPF.<sup>8</sup>

In the ecosystem of funding support for the media, the CPF occupies a defined niche, which has predominantly been the Canadian paid print magazines, print community (non-daily) newspapers and digital periodicals. Digital-only periodicals constitute an emerging client group of the CPF. Previously limited to the BI component, these periodicals will be supported through the digital-only component of ATP starting in 2021-22. This reflects the increasing reliance on digital information sources among Canadians to access relevant news and information. Digital periodicals also received funding through the Special Measures for Journalism component in 2020-21, in response to the COVID-19 pandemic. This funding was subsequently secured for 2021-22 as well.

<sup>6</sup> Public Policy Forum, 2017, p. 16

<sup>7</sup> Canadian Heritage, 2020c

<sup>8</sup> Canadian Heritage, 2020e

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The overall logic of the CPF has been to provide flexible and stable funding support to paid print magazines, print community (non-daily) newspapers and digital periodicals, through the ATP component:

- As stated in the ATP application guidelines, the funding could be spent on a wide range of activities related to creation (writing, editing, photography, illustration and design), production (pre-press and printing), marketing, distribution, website development and enhancement (including content development, and enhancements to the site's architecture and functionality), and the production of a digital periodical associated with an eligible print periodical.<sup>9</sup>
- Evaluation findings indicate that, during the five-year period, the approval rate varied between 93% and 96%. As already noted in the program description, the amount of financial support provided was determined by a formula based on eligible copies sold or circulated (which will change with the modernization process).

The BI and CI components were expected to play a complementary role to the ATP component, by providing more targeted funding to assist the industry in adapting to emerging trends and opportunities. Whereas the BI component specifically supported print magazines and digital periodicals as they explored innovative approaches to pursue their mission, the CI component targeted industry-wide initiatives for paid print magazines, print community (non-daily) newspapers and digital periodicals, that could enhance their sustainability.

### **The impact of the modernization process**

The Canadian magazine and newspaper industries faced several challenges that the modernization process seeks to address. For magazines, this includes increased competition from online content providers such as Google, Facebook and Apple, which can attract significant consumer traffic and divert advertising revenue. Further, it is expensive for magazine publishers to maintain both print and digital operations, and this is further compounded by declining operating revenues. Magazine publishers also face difficulty in monetizing digital content and increases in digital revenue are not enough to offset declines in print revenue.<sup>10</sup>

The Canadian newspaper industry faces similar challenges as the availability of online alternatives to traditional media are changing news consumption patterns. Newspapers are increasingly having to compete with other industries (e.g., broadcasters) as well as with new competitors (e.g., social media). Moreover, advertising revenue is increasingly migrating online. For example, classified advertising used to be a major revenue source for print newspapers, but this has largely been replaced by sites such as Kijiji.<sup>11</sup>

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<sup>9</sup> Canadian Heritage, 2020a

<sup>10</sup> Canadian Heritage, 2019

<sup>11</sup> Canadian Heritage, 2019

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Officially announced in February 2020, the modernization process responds to a call in the Minister of Canadian Heritage’s mandate letter to find innovative ways to support the creation of content in Canada’s media sector.<sup>12</sup> More specifically, the federal government “is taking steps to modernize the Canada Periodical Fund (CPF) by prioritizing activities that will lead to the production of quality Canadian editorial and journalistic content, regardless of the platform used to offer it”.<sup>13</sup> Consequently, the funding formula used to provide the ATP support will, over a five-year implementation period, increasingly reward investments in editorial and journalistic content, rather than simply considering circulation volumes. This is expected to facilitate access to relevant original Canadian content in all regions of the country and encourage periodicals to increase their investment in editorial content.

In developing this new process and funding formula, PCH consulted with numerous industry stakeholders, including magazine and newspaper associations. Publicly available data indicates that industry stakeholders such as Magazines Canada, the Alberta Magazine Publishers Association, the Magazine Association of BC, and News Media Canada welcome the government’s support and the proposed changes to the CPF.<sup>14</sup>

However, given that the modernization process was only announced at the end of the evaluation period, the impact of these changes to the CPF is not known at this time.

### **Approaches in other jurisdictions**

The evaluation also explored what other countries have implemented to support their respective magazine and newspaper industries. The goal was not to conduct an exhaustive review, but rather to better identify innovative approaches that may assist non-daily newspapers and magazines to adapt to the shifting media environment.

### **The uniqueness of the ATP component**

The first finding to emerge from this exploration was that the type of support provided through the ATP component appears to be unique to Canada. The evaluation identified no other program that provided formula funding to eligible paid print magazines, print community (non-daily) newspapers and digital periodicals, to support publishing activities. In fact, no other program was found that specifically targeted community newspapers, such as the non-daily newspapers supported through the CPF. Numerous countries employ a mixture funding and scholarships to support a range of individual journalists, publishers and media organizations delivering a whole range of information products and services.

### **Programs similar to the BI component of the CPF**

The fundamental goal of the BI component is to support innovation among small and mid-sized print magazines and digital periodical publishers. The research identified three funding programs that offered

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<sup>12</sup> Trudeau, 2019

<sup>13</sup> Canadian Heritage, 2020c

<sup>14</sup> Emmanuel, 2020; Magazines Canada, 2020



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similar supports or with similar objectives as the BI component: the Digital News Innovation Fund, the Regional and Small Publishers Innovation Fund, the Flemish Journalism Fund.

Albeit at a larger scale, the Digital News Innovation Fund, which is part of the Google News Initiative, supports innovation in digital periodicals.<sup>15</sup> Launched in 2015, this private sector initiative is centred on four of the primary challenges that the media industry is facing: telling local stories, boosting digital revenues, battling misinformation, and exploring new technologies.<sup>16</sup> Eligible expenses included editorial costs (e.g., staff or freelance employees), asset creation costs (such as licenses), engineering costs (e.g., product development, project management, user experience design, database build and maintenance, and hosting) and marketing expenses.

Funding proposals to the Digital News Innovation Fund were expected to describe their impact on the news ecosystem (e.g., production of original journalism or creation of new revenue streams), the use of technology in innovative and transformative ways, and their feasibility and sustainability (sound business plan, key performance indicators or metrics, and set out key risks and mitigation strategies).<sup>17</sup>

Examples of projects supported through the Digital News Innovation Fund included the following:

- The *Gudbrandsdølen Dagningen* is a Norwegian digital magazine project targeted at niche audiences (Norwegians who ‘weekend’ in rural communities and at cabins). The project was awarded €300,000 in 2017 to assess how they might capitalize on the large numbers of weekenders and how this might increase their readership. The project allowed this digital magazine to create a subscription-based website so that weekenders might access relevant local news. Subscribers pay €5 a month.<sup>18</sup>
- The German *Tagesspiegel LEUTE* was awarded €550,000 in 2016 to tackle the challenge of getting users to pay for highly valued local news content. The funding allowed this publication to hire 12 journalists – one for each of Berlin’s districts – who report weekly on local news as well as events, culture, cuisine, etc. Since the project’s launch, subscription has increased by 40%, from 93,000 to 130,000.<sup>19</sup>

The Regional and Small Publishers Innovation Fund is administered by the government agency Australian Communications and Media Authority. Since 2018, the Fund has distributed a total of \$16 million in various grant sizes (from small grants under \$20,000 to larger ones up to \$1,000,000) to enhance small and regional publishers’ capacity to make revenues from producing public interest journalism, promoting innovation and trial in digital journalism, and supporting business improvement

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<sup>15</sup> Google News Initiative, 2020a

<sup>16</sup> Digital News Innovation Fund, 2018

<sup>17</sup> Google News Initiative, 2020b

<sup>18</sup> Digital News Innovation Fund, 2018, p. 29

<sup>19</sup> Digital News Innovation Fund, 2018, p. 21

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activities in order to reinforce the financial position of small and regional news publishers.<sup>20</sup> Examples of funded projects include:

- *The Saturday Paper*, a weekly newspaper in Victoria, received grants to conduct an evaluation of its existing customer relationship management solution and internal customer management processes; to develop and implement pilot initiatives to ameliorate user engagement and finding ways to connect better with readers and the wider community; and to design a digital media studio at the publisher's headquarters to create and publish video and audio content.<sup>21</sup>
- *The Forty South Publishing* is a magazine located in Tasmania that received a grant to enhance its current website and buy content management system and customer relationship management tool.<sup>22</sup>

Pursuing socially engaged objectives, the Flemish Journalism Fund was launched in 2018 by the Flemish Association of Journalism and the Flemish government.<sup>23</sup> The grants it provided supported innovation in journalism and knowledge sharing initiatives. Projects funded to date include:

- *The Wablieft gaat digital*, which is a weekly newspaper published for individuals with limited literacy, newcomers, the elderly, and people with disabilities. Through the €32,400 it received, this media developed an online outlet allowing its audience to access relevant news. Prior to this, individuals with lower language proficiency had to rely on news websites for children or young people, which did not match their interests or needs.
- *The Polar Project* is the first Dutch-language magazine focusing entirely on climate change.<sup>24</sup>

### **Programs similar to the CI component of the CPF**

The CI component provides project funding to Canadian paid print magazine, print community (non-daily) newspaper and digital periodical organizations for industry-wide initiatives to increase their overall sustainability.<sup>25</sup>

The review of programs in other jurisdictions identified few similar initiatives. Arguably, some of the funding provided through the Digital Innovation Fund does aim to enhance the overall capacity of the media industry (or specific segments within), as illustrated through the following examples:

- *Mediabridge.org* is a digital platform established in 2019 that connects media outlets in the global south with the global north regarding news-breaking and investigative stories produced

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<sup>20</sup> GrantConnect, 2018

<sup>21</sup> Australian Communications and Media Authority, 2018

<sup>22</sup> Australian Communications and Media Authority, 2019

<sup>23</sup> journalismfund.edu, 2020

<sup>24</sup> Deken, 2020

<sup>25</sup> Canadian Heritage, 2020b

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by local journalists in conflict areas or hard-to-reach regions. Mediabridge is not a media outlet but a space for creating collaborations among media outlets around the globe, therefore enhancing their overall capacity to pursue their mandate.

- *Bureau Local* was established in 2017 as a collaborative investigative network with 1,100 members across the United Kingdom, including regional and national news outlets, local reporters, hyperlocal bloggers, technologists, community-minded citizens and specialist contributors. The network is part of the Bureau of Investigative Journalism, a non-for-profit organization founded in 2010 in the United Kingdom to invigorate local news. With the support of the Digital Innovation Fund, the *Bureau Local* team developed a set of tools which regional and national news reporters can use to work with data sets, ranging from open access instructions for reporting stories to insights in approaches. Through this data-driven approach, journalists are able to draw attention to previously unearthed issues. It also includes non-traditional agents such as civic-minded citizens and hyperlocal bloggers into the wider news ecosystem.<sup>26</sup>

### Lessons learned for the CPF

The review of programs implemented in other countries illustrated the fact that, while challenges were largely similar, strategies to support the magazine and newspaper industries were typically tailored to reflect the context of each region and the specific goals that were pursued. The various initiatives summarized in this report were focused on supporting innovative approaches to assist the industry in finding new ways of operating and maintaining their relevance in an increasingly open environment where providers of news, particularly local news, shift and evolve. As previously noted, this review did not identify other programs that provided general and sustained funding such as the one offered through the ATP component.

## 4.2. Optimizing internal resources

### Evaluation question:

To what extent is the delivery of the CPF optimizing internal resources?

### Key finding:

Strong processes were in place to manage the funding allocation of the CPF. However, the program had yet to implement certain efficiency measures, particularly an online application portal and better distribution of ATP application intakes throughout the year.

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<sup>26</sup> Bureau of Investigative Journalism, 2020

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## Key strengths

While its scope and format have evolved over the years, the CPF is a mature program that benefits from strong delivery mechanisms and procedures. Evaluation findings indicated that the program systematically met its service standards over the period, which was particularly critical for the ATP component that received approximately 800 applications annually. As noted during interviews conducted with program representatives, the CPF was collaborating with a largely returning clientele, who were familiar with the program's processes and funding requirements. According to program representatives, it was estimated that more than 95% of program recipients were returning applicants.

## Key challenges

Despite these strengths, the CPF was facing some design and delivery challenges:

- At the time of the evaluation, the program had not yet implemented an online application process, and the intake cycles led to administrative resource challenges over the period. The PCH online modernization process and the implementation of two intake periods for the ATP applications are expected to address some of these challenges. The program is expected to be integrated into the department's online process in 2022-23.
- The ATP component operated with only one intake per year, which monopolized considerable resources, and led to uneven administrative resource allocations throughout the year. For this component alone, the team processed approximately 800 paper-based applications submitted at the same period of the year. Once the process was completed, each letter to ATP recipients was printed, signed, and posted manually. These challenges did not apply to the BI and CI components, as those were open throughout the year (with some restrictions for funding to be used during the same year as the application), and the volume was considerably lower.

Through key informant interviews, program representatives indicated that the planned modernization would result in the ATP component having two intake processes per year, to more evenly distribute the workload associated with processing all ATP applications.

## Performance data

As a mature program, the CPF has built a robust performance measurement strategy, which supports ongoing monitoring of resource allocation. In particular, the ATP component provides annual performance data such as:

- Categories of periodicals (paid print magazines, print community (non-daily) newspapers and digital periodicals);
- Periodical types (consumer, arts, religions, trade), and targeted groups (Indigenous, ethnocultural, OLMCs, LGBTQ2S);
- Language of periodicals (English, French, bilingual, others); and

- Types of funding (grant and contribution).

In addition to serving the ongoing management of the program, and the cyclical evaluation of the program, this performance information could support GBA Plus of the program.

### 4.3. Assistance provided and impact on the industry

#### Evaluation questions:

How has the CPF assisted Canadian publishers during the evaluation period?

To what extent has the CPF enhanced the capacity of the Canadian periodical industry to appropriately adapt to emerging trends?

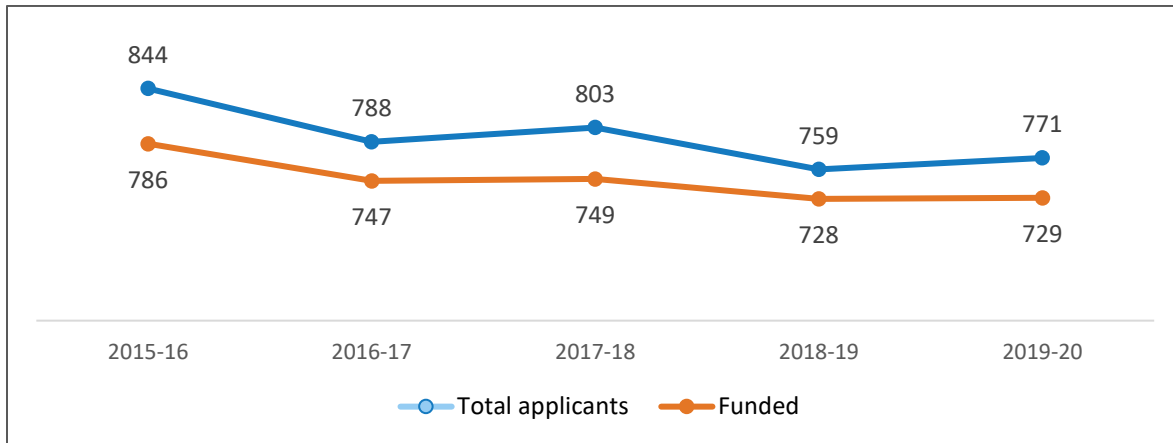
#### Key finding:

ATP provided stable and flexible funding that supported the ongoing operations of funded magazines and non-daily newspapers. The BI component met its objectives of aiding small and medium size organizations in adapting to the changing market conditions in print and digital magazines. Findings indicate that the program utilized a broad definition of innovation and that some of the funded projects were not aligned with commonly held views of innovation. As for the CI component, it provided complementary funding that benefited the industry.

#### Support provided through the ATP component

Evaluation findings indicate that the overall pool of potential beneficiaries for the ATP declined over the evaluation period. According to interviews with program representatives, the predominant factor that explains this trend was the economic setbacks experienced by the periodical industry. Despite this trend and as shown in Figure 2, the ATP continued to provide assistance to over 700 periodicals in the country.

**Figure 2: Number of applicants and recipients of ATP funding**



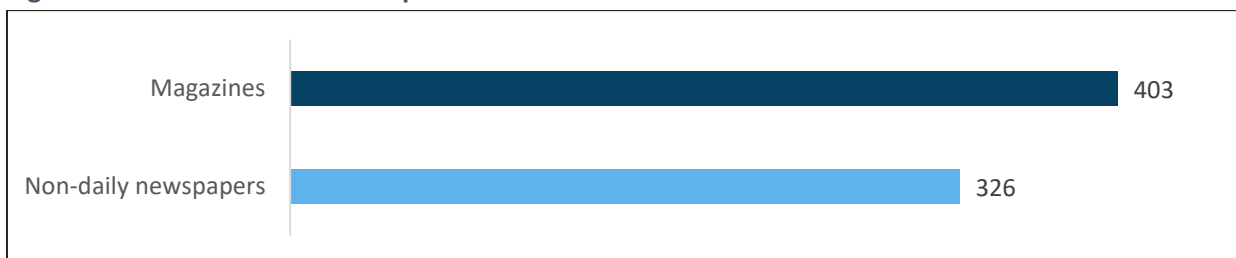
Source: Administrative data

Several factors are considered by the ATP funding formula. For example, the size of a publication is considered, such that smaller publications receive more funding per copy sold than do larger publications. Further, there is a \$1.5 million cap which limits the amounts of funding that large publications can draw from the program.

Periodicals that target OLMCs, Indigenous, ethnocultural, and LGBTQ2S readers also benefit from special measures that improve their access to the ATP component. Indeed, recognizing that these periodicals have a key role to play in the communities they serve, the ATP provides these groups with a 5% bonus, among other measures, which means they get more funding per copy sold than other similarly sized publications.

The distribution of funding between paid print magazines, print community (non-daily) newspapers and digital periodicals, was fairly even. As indicated in Figure 3, of the 729 periodicals that received ATP funding in 2019-20, a little more than half (55%) were magazines, and the remaining portion (45%) were community newspapers. This trend has been largely the same during the entire evaluation period.

**Figure 3: Distribution of ATP recipients in 2019-20**



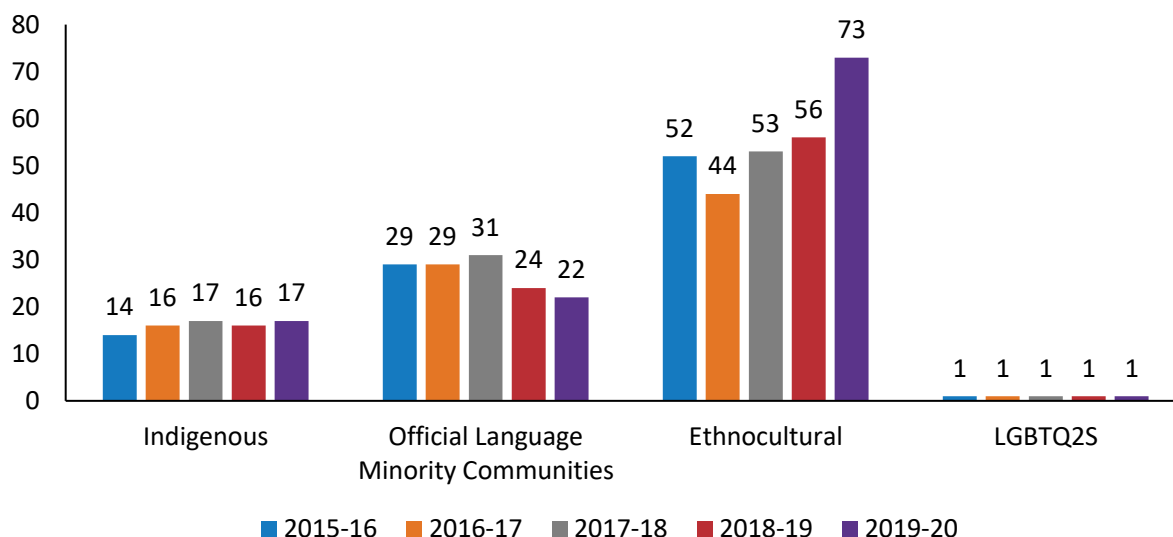
Source: Administrative data

Using the same fiscal year (2019-20), the data indicated that 67% of the funded periodicals were published in English, while 20% were published in French. The remaining were either bilingual (3%) or

published in other languages (10%). The trend was largely the same for the entire period covered by the evaluation.

As for the periodicals published by targeted groups, they represented, in 2019-20, 16% (n= 113/ 729) of the total number of funded periodicals. Ethnocultural periodicals were the largest group funded (see Figure 4).

**Figure 4: Number of funded titles from targeted groups from 2015-16 to 2019-20**



Source: Administrative data from program

Between 2015-16 and 2019-20, almost all targeted groups saw their funding envelopes increase as well as their number of titles supported by the program (Table 5). OLMC publications were the only group that saw their funding envelope decrease slightly because of a decrease in the number of titles that received support. For example, the funding envelope for OLMCs dropped by about 2% over the five years but the number of titles dropped by almost 32% (Table 6).

**Table 5: Funding (\$) of funded titles from targeted groups, 2015-16 to 2019-20**

Targeted Groups	2015-16	2016-17	2017-18	2018-19	2019-20
Indigenous	\$267,219	\$399,727	\$444,444	\$431,176	\$373,748
OLMCs	\$818,204	\$879,097	\$964,020	\$849,066	\$799,384
Ethnocultural	\$1,638,124	\$1,591,958	\$1,907,621	\$2,081,504	\$5,861,063
LGBTQ2S	\$25,070	\$24,269	\$28,174	\$31,154	\$28,365

Source: Administrative data from program

**Table 6: Percentage (%) of change in number of titles and funding levels by targeted groups, 2015-16 to 2019-20**

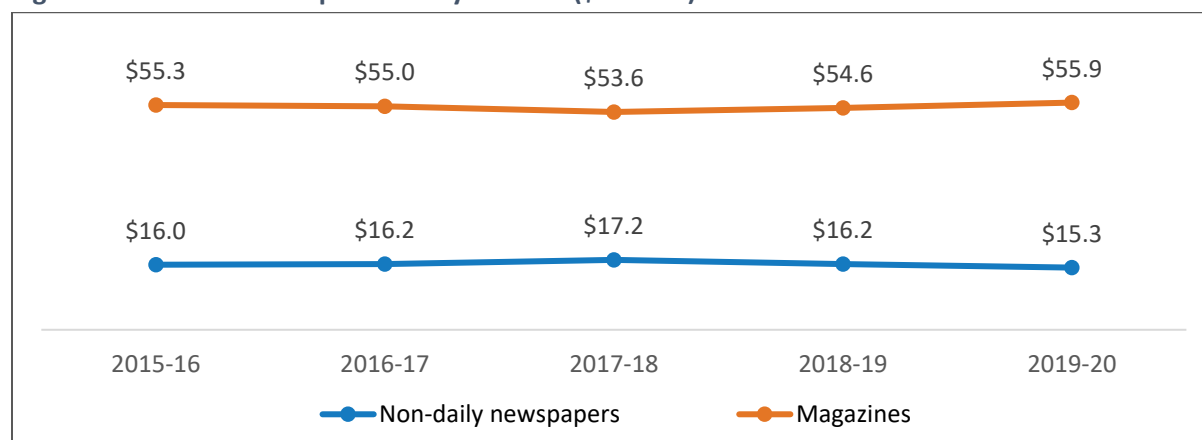
Funded Titles from Targeted Groups	% change number of titles 2015-16 to 2019-20	% change funding levels 2015-16 to 2019-20
Indigenous	+17.6%	+28.5%
OLMCs	-31.8%	-2.4%
Ethnocultural	+28.8%	+72.0%
LGBTQ2S	0.0%	+11.6%

Source: Administrative data from program

The targeted group periodicals were predominantly (65%) community newspapers, while the remaining 35% were magazines.

As indicated in Figure 5, while the distribution between the number of funded community newspapers and magazines were similar, the level of funding itself was predominantly directed toward magazines, which received 78.5% of the ATP funding in 2019-20.

**Figure 5: Level of funded provided by the ATP (\$ million)**



Source: Administrative data

58% of the ATP funding in 2019-20 was directed toward magazines published in English, while magazines published in French received 31% of the funding, and the remaining 11% went to bilingual magazines or magazines published in other languages.

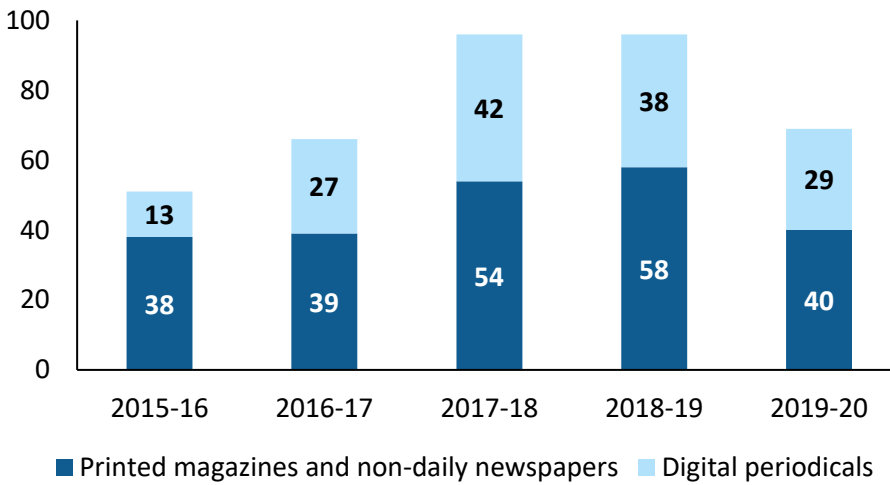
Finally, the vast majority of the 2019-20 funding was provided to paid print magazines, print community (non-daily) newspapers and digital periodicals, located in Quebec (40%) and Ontario (40%).



## Support provided through the BI component

During the evaluation period, the number of funded projects under the BI component tended to increase, particularly among the digital periodicals (see Figure 6). The number of non-funded projects also increased over the same period, ranging from five (5) projects in 2015-16 to 31 projects in 2018-19.

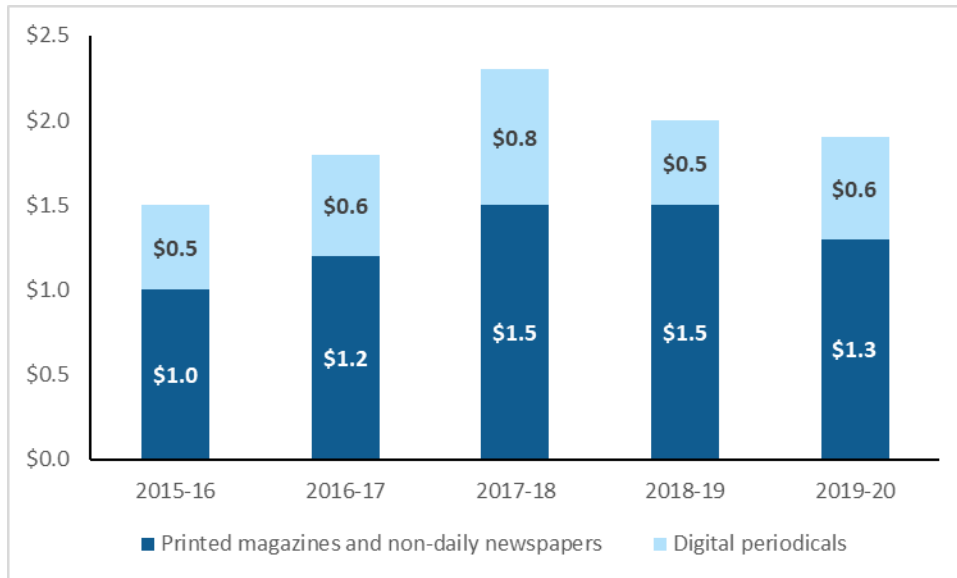
Figure 6: Number of funded projects under BI



Source: Administrative data

Between \$1.5 million and \$2.3 million funding for BI projects was approved annually, and this covered both print and digital periodicals (see Figure 7). The actual funding provided to each project was relatively limited: the average project funding stood at \$28,016 for printed projects and \$25,819 for digital projects.

Figure 7: Level of funding approved under BI (\$ million)



Source: Administrative data

As its title indicates, the purpose of the BI component is to support innovation among small and mid-sized print magazines and digital periodical publishers. The Department defines innovation as “changing or creating more effective processes, products or ideas, to increase productivity, performance and sustainability”.<sup>27</sup>

The Organisation for Economic Co-operation and Development (OECD) defines product innovation as “a good or service that is new or significantly improved”.<sup>28</sup> Along the same lines, it defines process innovation as “a new or significantly improved production or delivery method”.<sup>29</sup> Also, the program implemented in other jurisdictions and described in subsection 4.1 of this report illustrated the range of innovative approaches that may be supported in relation to periodicals.

The evaluation found that a wide range of projects received funding from the BI component, including some that exhibited limited level of innovation. For instance, the BI component had typically been funding website changes and refreshes (including updates to make websites mobile friendly or to allow financial transactions), social media strategy development, surveys of potential readerships, rebranding, or other market research activities. While such projects fell outside of regular editorial, production, and distribution activities and could be inherently valuable, they demonstrated limited alignment with commonly held views about innovation.

<sup>27</sup> Canadian Heritage, 2020d

<sup>28</sup> Meige, 2009

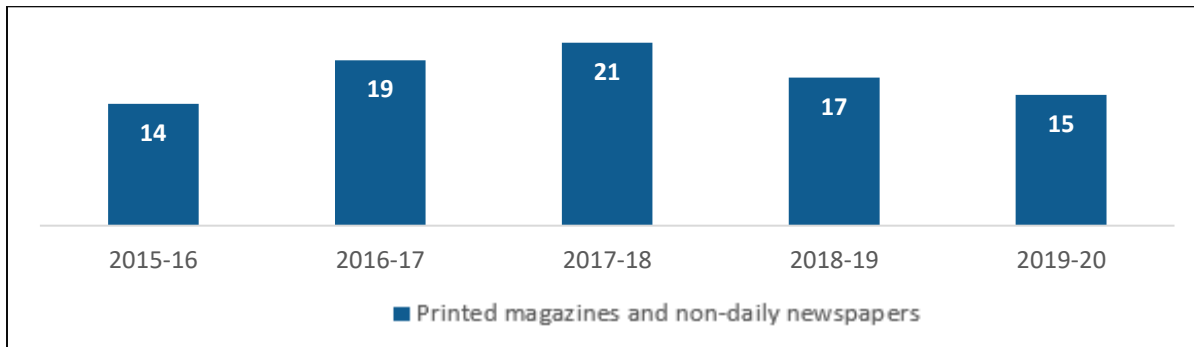
<sup>29</sup> Ibid.

As noted during interviews, however, the limited funding allocated to each project as well as the size and financial capacity of the organizations may have limited the ability of recipients to implement more innovative products or processes.

### Support provided through the CI component

During the evaluation period, between 14 and 21 projects were funded yearly under the CI component (see Figure 8).

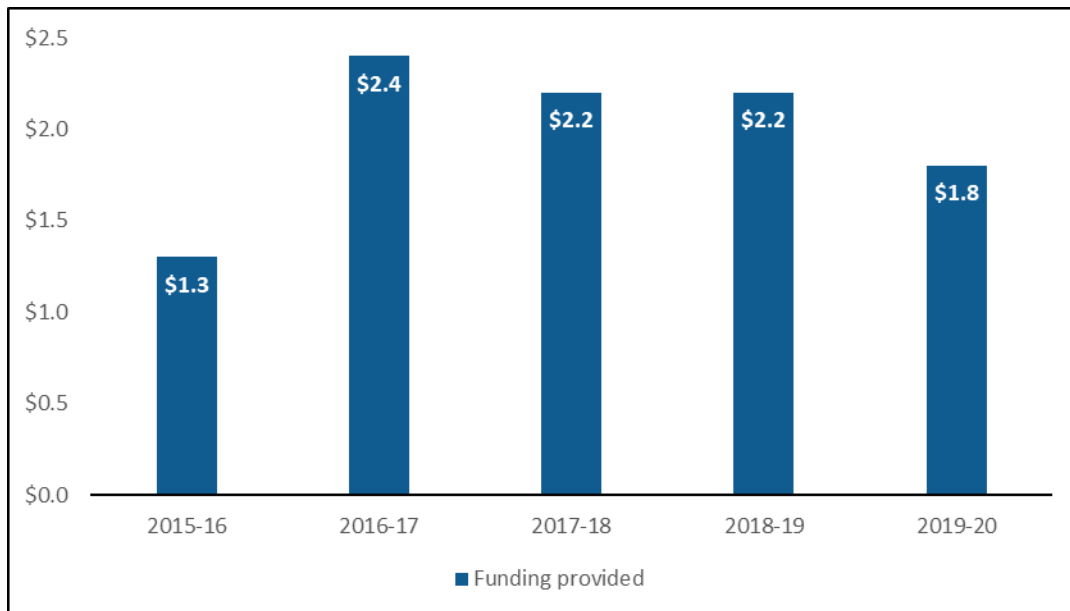
Figure 8: Number of funded projects under CI



Source: Administrative data

This represented an average of \$2 million in funding per year for this component, and an average of \$111,335 per project approved.

Figure 9: Level of funding approved under CI (\$ million)



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Source: Administrative data

These were organization-based projects that enhance collective efficiency in the creation, publication, and distribution of Canadian periodicals and it supports their competitiveness.

#### 4.4. Gender-based analysis plus

**Evaluation question:**

**To what extent has the management of the CPF integrated a gender-based analysis plus?**

**Key finding:**

Over the evaluation period, the CPF had not integrated a GBA Plus analysis in its ongoing management processes. Considering the nature of the program and government policies and priorities, such an analysis appears particularly relevant. There is evidence that the CPF has considered GBA Plus to a certain extent as it directly targets certain groups (e.g., Indigenous, ethnocultural, LGBTQ2S, and OLMC audiences).

The federal government's Policy on Results requires that, in establishing their performance measurement strategy, program managers include, where relevant, a GBA Plus analysis. There is also a requirement that, in planning the evaluation of their programs, departments should consider GBA Plus.

The CPF collects disaggregated administrative data by type of periodical and geography through applicant reporting requirements. Such data is collected at the publisher-level only.

The evaluation indicated that although the CPF had yet to formally integrate a GBA Plus into its ongoing program processes, an informal GBA Plus analysis of the CPF was undertaken by the program. The analysis found that, while the CPF's impact is gender-balanced, it directly targets certain groups (e.g., Indigenous, ethnocultural, LGBTQ2S, and OLMC audiences). As part of its modernization process, the CPF will seek to improve access to content for audiences living in remote areas where broadband is available but physical distribution is costly, thus improving the program's accessibility.<sup>30</sup>

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<sup>30</sup> Canadian Heritage, n.d.

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## 5. Conclusions

### Relevance

The CPF is a critical component of the overall support provided by the federal government to the periodical industry, with a particular focus on paid print magazines, print community (non-daily) newspapers and digital periodicals, and an increasing presence of digital periodicals. Through a stable funding support of approximately \$75 million yearly, the program addressed important needs of its targeted beneficiaries, which played a critical role in ensuring that Canadians have access to relevant Canadian news content.

The CPF supports the industry in facing challenges related to declining advertising revenues and distribution in an increasingly digital marketplace. During the evaluation period, PCH began efforts to modernize the program, to better address new and emerging realities of the magazine and community newspaper industries. The modernized CPF prioritizes activities that lead to the production of quality Canadian editorial and journalistic content, regardless of the platform used.

### Design and delivery

The CPF benefits from a strong and well-established program delivery structure. However, the program had not implemented an online application process during the period of the evaluation, and the intake cycles led to uneven administrative resource allocations for ATP throughout the years. The modernization process is expected to address some of these challenges, particularly through two intake processes for ATP applications.

The CPF has built a robust performance measurement strategy, which provides detailed information on program reach. This supported the ongoing management of the program and could serve as the foundation for GBA Plus.

### Program effectiveness

Despite several industry challenges, the ATP component was successful in providing meaningful support to a large portion of eligible organizations. The shift in emphasis that was implemented through the modernization process will inevitably trigger changes in the level of support provided to eligible recipients. Furthermore, it is expected that the number of ATP recipients could increase, with the addition of the new digital-only component. The extent to which this will strike the desired balance between the goal of promoting Canadian content and ensuring the sustainability of the industry involved in non-daily newspapers and paid magazines has yet to be assessed.

The BI and CI components provided complementary support, including an increasing level of participation from digital periodicals. The BI component met its objectives, however, given the broad definition of innovation used, some of the funded projects would not be considered innovative according to commonly held views. A review of programs implemented in other countries illustrated a

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range of approaches better aligned with common definitions of innovation, and which might also assist non-daily newspapers and magazines to adapt to the shifting environment in which all media operate.

### **Government-wide consideration**

At the time of the evaluation, the CPF had not yet to formally implement a GBA Plus process into the ongoing management of its activities. The objectives pursued by the CPF, and the existing data being collected, point to a solid foundation upon which the program could proceed with such an analysis. This could possibly be integrated into the modernization process.

Notwithstanding, PCH recently undertook an informal GBA Plus of the CPF which found that, while the CPF's impact is gender-balanced, it directly targets certain groups. The modernization process is expected to further improve access to content for audiences living in remote areas where broadband is available but physical distribution is costly.

## 6. Recommendations, management response and action plan

In light of the findings and conclusions of this evaluation, two recommendations are identified to address areas that need attention to ensure continued relevance and performance of the CPF.

<b>Recommendation 1</b>
The evaluation recommends that the Assistant Deputy Minister, Cultural Affairs Sector, explore options and implement new approaches within the Business Innovation (BI) component to maximize the opportunities for recipients to innovate in changing market conditions.
<b>Management response</b>
The Cultural Affairs Sector accepts this recommendation. The BI component has historically supported a range of projects that have shown innovative results for publishers and enabled them to grow their business and reach new readers however, the program recognizes that there are opportunities for further innovation. The program will review the types of projects it supports and will examine the best practices and examples from other countries noted in the Evaluation Report to maximize the opportunities for recipients to innovate. The program acknowledges that Canadian magazines and community newspapers have added financial pressures due to the COVID-19 pandemic which may limit the capacity for publishers to innovate in the short-term. The result of this review could also lead to the program prioritizing certain types of projects. Furthermore, the program will engage with stakeholders to increase awareness of and to encourage publishers toward innovative projects.

**Table 7: Recommendation 1 – action plan**

Action Plan Item	Deliverable	Timeline	Responsible
1.1 Conduct a review of past projects funded through BI and examples from other countries noted in the Evaluation Report to examine opportunities to maximize innovation.	1.1.1. Summary report on findings (list of funded BI projects over last 5 years and results and examples from other countries noted in the Evaluation Report).	April 2022	Director, Periodical Publishing Policy and Programs
	1.1.2. Interim report (identification of types of projects to prioritize).	May 2022	Director, Periodical Publishing Policy and Programs

Action Plan Item	Deliverable	Timeline	Responsible
	1.1.3. Report with options for implementation.	July 2022	Director, Periodical Publishing Policy and Programs
1.2 Communicate with industry stakeholders and regional associations to convey purpose of BI component, clarify objectives and to provide guidance on types of innovative projects that have been supported and shown results.	1.2.1 DG-approved communications & outreach strategy.	November 2022	Director, Periodical Publishing Policy and Programs
<b>Full implementation date:</b> November 2022			

## Recommendation 2

The evaluation recommends that the Assistant Deputy Minister, Cultural Affairs Sector, undertake the completion of a gender-based analysis to further ensure the CPF program is aligned with the emerging needs and preferences of diverse groups.

### Management response

The Cultural Affairs Sector accepts this recommendation.

In the context of the COVID-19 pandemic, the program launched and completed the latest update to its 2018 GBA+ analysis in January 2021. This review included an analysis of the impact of expected outcomes on a broad range of demographic characteristics, as well as indirect benefits, long-term benefits and potential negative impact of programming. The program will further its work in recognition of the important needs and preferences of diverse groups by examining the specific situation and business environment for publishers serving diverse communities; the program will be participating in the Department of Canadian Heritage Equity Diversity and Inclusion program review, and will conduct dedicated research initiatives on these communities including English Canada and Quebec markets as well as OLMs, ethnocultural and Indigenous communities.



**Table 8: Recommendation 2 – action plan**

Action Plan Item	Deliverable	Timeline	Responsible
2.1 Complete an updated gender-based analysis review of the CPF.	2.1.1. GBA report.	January 2021  (complete)	Director, Periodical Publishing Policy and Programs
2.2 The Department will carry out a review of its programs to identify and help remove systemic barriers to accessing programming for equity-deserving communities and support sectors in developing their own approaches to improve equity, diversity and inclusion. The Canada Periodical Fund program, will be included as part of this review to ensure identification of opportunities to improve access at the program and policy level.	2.2.1. EDI review of the CPF.	October 2022	Director, Periodical Publishing Policy and Programs
2.3 Conduct community-specific research to better understand the operating environment, needs and priorities for target groups, in particular Indigenous, ethnocultural and OLM communities.	2.3.1. Summary report on findings from surveys, interviews, research and EDI review.	January 2023	Director, Periodical Publishing Policy and Programs
	2.3.2. Report with options for implementation.	March 2023	Director, Periodical Publishing Policy and Programs
2.4 Communicate with industry stakeholders and regional associations on the results of the review and any implementation plans, as applicable.	2.4.1 DG-approved communications & outreach strategy.	July 2023	Director, Periodical Publishing Policy and Programs
<b>Full implementation date: July 2023</b>			

## Annex A: Evaluation framework

The evaluation framework below presents the evaluation questions and indicators as well as the data collection methods that were used in the conduct of the evaluation.

### Issue 1: Relevance – How is the CPF responding to the needs of the Canadian Periodical industry?

Indicators	Document and literature review	Admin data review	Interviews (internal)
Alignment between the needs of the industry and the activities of the CPF	X		
Approaches and best practices in other jurisdictions to support the periodical industry	X		

### Issue 2: Design and Delivery – To what extent is the delivery of the CPF optimizing internal resources?

Indicators	Document and literature review	Admin data review	Interviews (internal)
Strengths and shortcomings of the current program delivery structure	X		X
Level of compliance with service standards	X		X
Evidence of performance measurement strategy	X		X
Best practices and areas for improvement for program delivery	X		X

**Issue 3: Effectiveness – How has the CPF assisted Canadian publishers during the evaluation period?**

Indicators	Document and literature review	Admin data review	Interviews (internal)
Yearly number of funded recipients per program component		X	
Level of funding provided per program component		X	

**Issue 3: Effectiveness – To what extent has the CPF enhanced the capacity of the Canadian periodical industry to appropriately adapt to emerging trends?**

Indicators	Document and literature review	Admin data review	Interviews (internal)
Range of needs met by the programs during the evaluation period	X	X	X
Key characteristics of funded recipients (categories, regional distribution, language, etc.)	X	X	X
Nature of projects funded under the BI and CI components	X	X	X

**Issue 4: Government-wide policy considerations – To what extent has the management of the CPF integrated a gender-based analysis plus?**

Indicators	Document and literature review	Admin data review	Interviews (internal)
Evidence that the program has conducted a gender-based analysis plus to guide the ongoing management of the CPF	X		X
Evidence of considerations given to the level of access to the CPF and its benefits for diverse groups of women, men and non-binary people.	X		X

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