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List of acronyms and abbreviations

CBF	Canada Book Fund
ESF	Emergency Support Fund
FAA	Financial Administration Act
FBM	Frankfurter Buchmesse (Frankfurt Book Fair)
FTE	Full-time Equivalents
FRMAP	Foreign Rights Marketing Assistance Program
GC	Government of Canada
Gs&Cs	Grants and Contributions
IDEA	Inclusion, Diversity, Equity and Accessibility
LCB	Livres Canada Books
NTPBP	National Translation Program for Book Publishing
OLMC	Official Language Minority Community
O&M	Operation and Maintenance
PCH	Department of Canadian Heritage
SFB	Support for Booksellers
SFO	Support for Organizations
SFP	Support for Publishers

Executive Summary

The Canada Book Fund (CBF) aims to ensure access to a diverse range of Canadian-authored books both nationally and internationally by fostering a strong book industry that publishes and markets Canadian-authored books. The program has two main components: Support for Publishers (SFP) and Support for Organizations (SFO). As mandated by the *Financial Administration Act* (FAA) and the Treasury Board Secretariat Policy on Results (2016), the evaluation assessed the program's relevance, effectiveness, and efficiency using a mix of qualitative and quantitative data from primary and secondary sources. It covered the period from 2018-19 to 2022-23.

Relevance

The CBF remains crucial for supporting the Canadian publishing sector. Federal investment is needed to help Canadian-owned publishers remain competitive while adapting to industry changes, including technology advancements and market shifts as well as rising production and distribution costs and inflation. The program has effectively responded to many industry needs, including those arising from the COVID-19 pandemic, by providing emergency support and launching new recovery initiatives. However, the evaluation identified gaps, particularly in accessing French-language books outside Quebec and in translating non-literary Canadian-authored books. There are also challenges with technological literacy to support the creation of quality metadata which is essential to the discoverability, marketing and promotion of Canadian-authored books.

The CBF aligns with government priorities on equity, diversity, and reconciliation with Indigenous peoples. Smaller publishers, Indigenous publishers, and those from racialized and Official Language Minority Communities (OLMC) still face barriers in accessing the program.

Effectiveness

The CBF generally met its immediate and intermediate expected outcomes over the evaluation period. Annually, the CBF helped to publish around 6,500 new Canadian-authored titles in both print and digital formats. It supported a wide variety of Canadian publishers (260 yearly), enabling them to publish a diverse range of Canadian-authored books in English, French, and other languages, as well as across multiple genres and formats. Marketing projects funded by the CBF, which included participation in book fairs, boosted demand for these books both domestically and internationally. The program supported technological advancements that improve industry intelligence.

Since the program's inception in 1979, it has contributed to the Canadian publishing industry's growth. Today, there are nearly three times as many Canadian-owned publishers, four times as many books published annually, and five times as many Canadian authors.

The temporary initiatives, Support for Booksellers (SFB) and Accessible Digital Books, also made progress toward their objectives. The SFB initiative successfully helped Canadian bookstores recover from the pandemic,

increasing their online sales. The Accessible Digital Books initiative supported various activities such as business development, internships, and audiobook conversion, to enhance accessible publishing in Canada.

Efficiency

The CBF is well-managed, with actual spending aligning with planned budgets, a relatively low administrative cost ratio, and the achievement of most service standards. The program efficiently delivered COVID-19 supplementary funding without incurring additional operating costs.

There are opportunities to enhance program efficiency. There are some weaknesses in the application and reporting processes; in particular, the project-based delivery model for the SFO component results in a high volume of applications, which leads to longer decision times. In addition, the SFP eligibility criteria may pose barriers to the program being inclusive of smaller publishers and those from equity communities.

The program's performance measurement approach is generally appropriate, capturing data on key results. However, there are needs to better define certain measures, particularly those related to achieving government priorities for inclusion, diversity, equity and accessibility (IDEA) and the desired outcomes of collective marketing initiatives.

Recommendations

Based on the findings and conclusions, this evaluation offers the following three recommendations.

Recommendation 1:

The Senior Assistant Deputy Minister, Cultural Affairs Sector, should further improve program design and delivery by reviewing application and reporting processes and ensuring the CBF better responds to the evolving needs of the industry.

Recommendation 2:

The Senior Assistant Deputy Minister, Cultural Affairs Sector, should better define how the CBF will address barriers and further support members of Indigenous, equity and official language minority groups within existing resources.

Recommendation 3:

The Senior Assistant Deputy Minister, Cultural Affairs Sector, should make improvements to the performance measurement of the program to support ongoing decision-making and reporting on results.

1. Introduction

This report presents the findings, conclusions and recommendations of the evaluation of the Canada Book Fund (CBF). The evaluation was conducted as prescribed in the Departmental Evaluation Plan 2022-23 to 2025-26. It addresses evaluation requirements outlined in the Treasury Board Secretariat Policy on Results (2016) and the *Financial Administration Act* (FAA).

The study was undertaken by the Evaluation Services Directorate with support from an evaluation consulting firm. It examines the relevance, effectiveness, and efficiency of the program from 2018-19 to 2022-23.

2. Program profile

2.1. Program activities, objectives and expected outcomes

The CBF is a grants and contributions (Gs&Cs) program that ensures access to a diverse range of Canadian-authored books nationally and internationally, by fostering a strong book industry that publishes and markets Canadian-authored books. The CBF has two components:

- Support for Publishers (SFP) – Provides funding that contributes to the ongoing production, distribution and marketing of Canadian-authored books by offsetting the high costs of publishing in Canada and building the capacity and competitiveness of the sector. The SFP also provides financial assistance to publishers for internships and business planning.
- Support for Organizations (SFO) – Provides funding to assist the Canadian book industry associations and related organizations to undertake collective projects that offer broad benefits to the industry and, ultimately, to readers everywhere.

Over the period of this evaluation, the CBF also delivered two temporary special initiatives:

- Support for Booksellers (SFB) – Provided two years (2022-23 and 2023-24) of support for the costs associated with online sales, including shipping costs, and to help Canadian booksellers improve their business models for online sales. Funding was allocated based on past sales of Canadian-authored books.
- Accessible Digital Books – Provided five years (2019-20 to 2023-24) of support for the sustainable production and distribution of accessible digital books by Canadian independent publishers.

Table 1 lists the objective of the CBF and the associated intended immediate, intermediate and ultimate outcomes.

Table 1: CBF objective and expected outcomes

Objective	Immediate outcome	Intermediate outcome	Ultimate outcome
To ensure access to a diverse range of Canadian-authored books nationally and internationally, by fostering a strong book industry that publishes and markets Canadian-authored books	• A broad range of Canadian- owned publishers invest in ongoing publishing operations • Marketing initiatives build demand for Canadian-authored books • Collective projects foster technological innovation and encourage the adoption of best practices industry-wide	Readers everywhere have access to a broad range of Canadian-authored books	Readers everywhere consume a broad range of Canadian-authored books

2.2. Program management and governance

Accountability for the CBF lies with the Senior Assistant Deputy Minister, Cultural Affairs Sector, while the responsibility rests with the Director General, Creative Industries and Trade Branch. Both CBF components and temporary special initiatives are delivered by Book Publishing Policy and Programs at Department of Canadian Heritage (PCH) headquarters.

The CBF uses a further distribution funding model to deliver the Foreign Rights Marketing Assistance Program (FRMAP), which aims to encourage exports of Canadian books. FRMAP is administered by Livres Canada Books (LCB), which receives funding for the program through the SFO component of the CBF.

2.3. Program resources

As shown in Table 2, the actual spending of the CBF over the 5-year period of the evaluation was over \$265 million, largely Gs&Cs (over \$248 million). There was \$17.0 million spent on salaries, operations and maintenance (O&M).

Table 2: Program resources (actual expenditures \$M), 2018-19 to 2022-23

Fiscal year	Salaries & O&M	Gs&Cs	Total
2018-19	3.0	36.9	39.9
2019-20	3.0	40.6	43.6
2020-21	3.3	61.2	64.5
2021-22	3.5	48.4	51.9
2022-23	4.3	61.2	65.5
Total	17.0	248.3	265.3

Source: Financial Planning and Resource Management, Chief Financial Officer Branch PCH

Note: Funding amounts are rounded, which explains the difference in some totals.

Between 2018-19 and 2023-24, the program's core budget was increased by a total of \$88.5 million to support PCH and Government of Canada's (GC) priorities. In summary:

- The two special initiatives: Accessible Digital Books – received \$22.8 million over 5 years (2019-20 to 2023-24) through the 2019 Federal Budget to support the sustainable production and distribution of accessible digital books by Canadian independent publishers; and *SFB* – received \$32.1 million over two years (2022-23 to 2023-24) through the 2021 Budget to help bookstores increase online sales.
- Creative Export Strategy - The CBF received an additional \$500,000 per year from 2018-19 to 2022-23 from the Creative Export Strategy to promote Canadian creators in foreign markets.
- Emergency Support Fund (ESF) - Provided approximately \$20 million in 2020-21 (\$9.7 million in emergency payments to the CBF recipients and \$10 million to support the Canadian book sector through Canadian book distributors).
- Recovery Fund for Arts, Culture, Heritage, and Sport Sectors - Budget 2021 provided \$300 million over two years to Canadian Heritage to establish a Recovery Fund for Arts, Culture, Heritage, and Sport Sectors, of which \$11.4 million was allocated to the CBF for 2021-22 and 2022-23.

3. Evaluation approach and methodology

As required by the FAA and the Treasury Board Policy on Results (2016), the evaluation assessed the relevance, effectiveness and efficiency of the Program.

3.1. Scope, calibration and quality control

The evaluation was undertaken in accordance with the Departmental Evaluation Plan 2022-23 to 2026-27 and covered a five-year period from 2018-19 to 2022-23. Based on assessment of risks and senior management needs, the key focus areas identified for the evaluation were the CBF's:

- response to current and changing industry needs;
- alignment with government priorities;
- structure and delivery; and
- success in improving access to a wide variety of Canadian-authored books.

The quality assurance measures undertaken during the evaluation included developing a clear description of the evaluation methodology and its limitations. Primary and secondary data were collected from multiple sources and analyzed to ensure that findings were reliable and defensible. The evaluation team also engaged representatives of the program to discuss evaluation issues and to validate the preliminary findings.

Given the limited time allocated to conduct this evaluation and that the CBF's relevance was demonstrated in the previous evaluation, the evaluation used:

- a limited number of data collection methods;
- existing data such as reports from engagement sessions with the book industry; and
- targeted interviews to explore the findings from the industry engagement sessions in more depth.

3.2. Evaluation questions

The evaluation issues and questions examined are listed in Table 3. The evaluation matrix, which details the indicators for the evaluation questions along with their respective data collection methods, is found in [Annex A](#).

Table 3: Evaluation questions by core issue

Core Issue	Evaluation questions
Relevance	1. To what extent is the CBF meeting the current and changing needs of the book industry? 2. To what extent is the CBF aligned with government roles, responsibilities and priorities, including those related to equity, diversity and reconciliation with Indigenous peoples?
Effectiveness	3. To what extent is the CBF achieving its intended outcomes?
Efficiency	4. To what extent is the CBF efficiently delivered?

3.3. Data collection methods

The evaluation methodologies included a combination of qualitative and quantitative data collection, using primary and secondary sources of information designed to answer the evaluation questions (Table 4).

Table 4: Summary of methodology

Methodology	Description
Document Review	The evaluation reviewed a large volume of documentation pertaining to the program, including activity/performance reports, presentations to the book industry, and reports on industry engagement sessions.
Administrative Data Review	The review focused on program administrative data, including data in the Grants and Contributions Information Management System (GCIMS), data related to the programs' results and achievement of service standards, and financial data.
Literature Review	The PCH Policy Research Group conducted a literature review, including published reports on the industry, public opinion research, and articles and reports from peer-reviewed journals.
Interviews	A total of 31 key informants were interviewed in 26 interviews. These included program managers, organizations that redistribute CBF funds, and recipients (national and regional associations, publishers, bookstores).

3.4. Evaluation limitations and mitigation strategies

Table 5 outlines the key constraints on the evaluation and the mitigation strategies used to minimize their impacts.

Table 5: Evaluation limitations and mitigation strategies

Limitations	Mitigation Strategy
Limited input from individual publishers without an industry survey.	Interviews were held with industry associations, which represent publishers. Access to the data from roundtables held by the program also enabled the evaluation to have information from individual publishers on certain questions.
Some results data were not available because of the global pandemic.	Trends were analyzed with available data and triangulated with other lines of evidence.
Complete results data were not available for Accessible Digital Books Initiative and the SFB initiative by March 31, 2023. These special investments were to sunset in 2023-24.	The evaluation used the perceptions of various stakeholders collected during the interviews and engagement sessions with book publishing industry to support its analysis.

4. Findings

4.1. Relevance

This section presents the evaluation findings regarding the relevance of the CBF, which focuses on: 1) the Program's responsiveness to the challenges and needs of the Canadian-owned book publishing industry; and 2) the extent to which it supports government priorities related to IDEA, reconciliation with Indigenous peoples, and environmental sustainability.

4.1.1. Ongoing need for the program

Evaluation question 1: To what extent is the CBF meeting the current and changing needs of the book industry?

Key findings:

- The CBF is an essential program for the Canadian publishing sector, helping industry organizations and booksellers compete better both domestically and internationally while promoting Canadian books to a wide audience.
- Rising costs, inflation, and technology adoption are key challenges and the industry lacks sufficient funding for long-term strategic investments.
- There are gaps with distributing French-language books in English-language markets and translating non-literary Canadian books, which could boost exports.
- During the pandemic, the CBF effectively adapted by providing emergency support and launching new initiatives to aid recovery.

The CBF is essential for the Canadian publishing sector

The CBF is the main government support for Canadian books and provides \$36.7¹ million in funding to the industry annually. It helps sustain the Canadian-owned book industry, which produces approximately 8,000 new books each year and generates nearly \$1.7 billion in revenue, employing more than 7,000 people and contributing approximately \$700 million to Canada's gross domestic product (GDP).²

While the CBF meets important needs for financial supports, its budget has not been increased in over 20 years. Some stakeholders mentioned that due to inflation, the real value of the funding has decreased by about 60%, making it difficult to support existing recipients and very difficult to include new ones or address new priorities like inclusion and environmental sustainability.

¹ The program's annual budget is between 35 and 38 million per year (approximately 30 for SFP and the rest for SFO).

Table 8 in the section on efficiency shows that the program will have received further funding during the evaluation period.

² Canadian Heritage, *Canada Book Fund*, January 2023.

The industry is facing rising costs, inflation, and technology adoption

Rising production and distribution costs, along with changing technologies, are impacting the Canadian book market. Independent Canadian publishers, who primarily publish Canadian-authored books, face tough competition from foreign-owned publishers that dominate the market with foreign-authored books. Canadian books sell better in traditional bookstores, especially in Quebec, where they make up about 50% of sales in independent stores. However, in the English-language market, Canadian books only account for 20% of sales in independent bookstores partially due to the strong presence of foreign-owned online booksellers.

Canadian publishers struggle to attract enough capital to invest in growth areas like marketing and technology, making them less competitive compared to larger foreign publishers. Rising costs and inflation further limit their ability to print books and manage inventory, especially with the closure of paper mills. The shift towards e-books and digital distribution requires new investments, challenging smaller publishers. Key informants emphasized that CBF support is essential for maintaining a wide range of publishing houses and a diverse array of books. Without government support, Canadian publishers might further struggle to compete with foreign publishers, and the variety of Canadian-owned publishers could diminish.

Like with other industries, technological change is continuously shaping Canadian book publishing. Digital infrastructure now supports every step of the supply chain, from authors to publishers, distributors, wholesalers, bookstores, libraries, and readers.

While print books are still the most popular format among Canadian readers, the demand for e-books and audiobooks has been growing in recent years. This increase in e-book popularity requires new investments, which can be challenging for smaller publishers. Digital distribution is also on the rise, meaning publishers, bookstores, and authors must adapt to these changes.

Effective sales and distribution systems are crucial for a publisher's market access and sales performance. One positive development in the industry is the software platform Bookmanager³, created in British Columbia. This platform is helping to improve efficiencies and is currently used by over 500 independent Canadian bookstores.⁴

The emergence of artificial intelligence, while offering some positive impacts for the book industry, raises important concerns about copyright protection. The development of a fair and safe AI ecosystem for the book publishing industry relies on copyright protection through the *Copyright Act*.

³ <https://bookmanager.com/tbm/> it is a platform that brings together all the information needed to acquire and run a bookstore.

⁴ Ian Austen, "Challenged by Tech and Market Forces, Independent Bookshops Bounce Back," July 22, 2023, in *New York Times*.

Discoverability, promotion and marketing of Canadian-authored books are important issues

Readers today have more options than ever before in what, when, and how they read. They can acquire books faster and from a wider selection than at any other time in history. Among the ways Canadians discover books is word of mouth (28%), however, this has been dropping over the past few years. Other popular methods of discovery are at bookstores (27%), public libraries (25%), and online book retailers and social media (22% each).⁵

In 2022, more readers engaged with book-specific social media posts (like those on BookTok, BookTube,, and Bookstagram) than visited book-specific social networks (like Goodreads, Wattpad and quialu.ca). Social media plays a significant role in book discovery and promotion. In particular, BookTok has become a powerful tool driving demand for books, benefiting Canadian authors, retailers, and publishers.⁶

This major shift to online discoverability and purchasing affects how publishers make their books visible, engage with readers, and how readers find and choose books.⁷ As readers increasingly discover books through social media and online platforms, small publishers face challenges in marketing and promoting Canadian-authored books effectively.

Large international publishers benefit from economies of scale, allowing them to promote and sell books at lower prices. In this competitive environment, publishers who invest in tools and processes that make it easy for consumers to find and buy their books will have an edge.⁸ Enhancing metadata⁹ use could improve book discoverability and sales. High-quality metadata, such as detailed descriptions of published titles for digital searches, enhances the discoverability of books. Good metadata increases the effectiveness of digital tools developed with CBF support. However, key informants pointed out that training on producing good metadata is still a challenge in the industry.

There are challenges with distributing French-language books outside Quebec

The evaluation reveals some challenges in access to French-language books outside Quebec. Independent English-language booksellers struggle to sell French-language books to French-language minority communities and to Francophiles.

⁵ *Canadians and their leisure time in 2023: Leisure and reading study*, Booknet Canada, May 30, 2023.

⁶ Jessica Singer, "BookTok's novel approach to books is helping Canadian authors, retailers attract new audiences, *CBC News*, August 29, 2021, retrieved from <https://www.cbc.ca/news/entertainment/booktok-tiktok-canadian-authors-retailers-1.6154331>.

⁷ Turner-Riggs, *Economic profile of the Canadian Book Publishing Industry: Technological, legislative and market changes in Canada's English-language book industry, 2008-2020*, prepared for Canadian Heritage, March 2021.

⁸ Turner-Riggs, *Book Distribution in Canada's English-Language Market*, prepared for Canadian Heritage, 2008.

⁹ Book metadata is essentially "data about data." It refers to information about a book that is used by online stores, bookstores, and readers. It includes essential details such as the author's name, title, subtitle, series information, language, categories, keywords, reviews, pricing, and description. In both physical and digital libraries, metadata plays a crucial role in sorting, categorizing, and discovering books. It enriches the understanding of data and enhances its usefulness.

These challenges arise from structural differences in how book distribution operates in each linguistic market. There are key differences in data on book ordering and shipping practices. English-language bookstores often lack knowledge about French-language publishers. French-language book information is rarely integrated into English-language systems, making it difficult to find and stock French-language books for booksellers that operate mainly in the English-language market. To a new user, the French-language market system of ordering can seem complex; it can also be unsuitable for the low volume of sales in an English-language bookstore. Booksellers from the English-language market may find that French-language book distributors have stricter return policies, making it financially risky to order books.

There are gaps in support for the translation of non-fiction Canadian-authored books

The translation of non-fiction Canadian-authored books is not well-supported in Canada. For many years, stakeholders have advocated for an expanded national translation program that would broaden the scope of eligible works and better respond to industry needs.

The National Translation Program for Book Publishing (NTPBP), administered by the Canada Council for the Arts, on behalf of PCH, increased support for translating fiction (literary) from 30 publishers in 2018-19 to 40 in 2022-23, resulting in 371 translated titles. However, non-fiction works are not eligible for the NTPBP normally.

In support of Canada's Guest of Honour presence at the Frankfurt Book Fair (FBM) in 2020-21, the Department provided approximately \$1 million in additional funding to the NTPBP for the translation of non-fiction works. This allowed for the translation of 138 works and supported a broader access of Canadian-authored books in Canada and abroad.

The Government responded to important industry needs brought about by COVID-19

The COVID-19 pandemic had a major impact on the book industry, disrupting the supply chain and affecting how people buy and read books. The industry trade press noted that the pandemic worsened existing issues like the closure of paper mills, labor shortages, distributor consolidation, and rising costs of materials and transportation.¹⁰

Bookstore sales in Canada dropped by 75% at the height of the crisis compared to the same period the previous year. However, a surge in online sales helped overall sales in 2020. Despite this, inflation and other costs reduced profit margins, forcing booksellers to offer free or discounted shipping to compete with major e-commerce players like Amazon.¹¹

¹⁰ R. Done, R. Warner, & R. Noorda, "Publishing Distribution Practices: New Insights About Eco-Friendly Publishing, Sustainable Printing and Returns, and Cost-Effective Delivery in the U.S.", *Publishing Research Quarterly* (springer.com), May 5, 2022, Volume 38, pages 364-381.

¹¹ Canadian Heritage, *Canada Book Fund: Presented to the Association of Canadian University Presses*, internal PPT presentation (June 2022).

To support the cultural sector, the government introduced the Emergency Support Fund (ESF). For the book industry, the ESF provided an additional \$8.7 million to existing funding agreements for 2020-21, benefiting Canadian independent book publishers and industry organizations. Moreover, new CBF recipients received \$1 million in funding in 2020-21. The ESF also invested \$10 million in a temporary CBF component, Support for Distribution, to help Canadian book distributors maintain operations and support the sale of Canadian books. This support positively impacted cash flows, retail bookstore viability, and the presence of Canadian-authored books in the market chain.¹²

Another government initiative, the Recovery Fund for Arts, Culture, Heritage, and Sport Sectors, allocated \$11.4 million to the CBF for 2021-22 and 2022-23, supporting publishers with \$6.4 million for operational relief, \$4 million for marketing and promotion (prioritizing Indigenous, OLMC and racialized applicants) and \$1 million allocated based on sales of books authored by members of Indigenous, OLMC or Racialized communities. These investments were accompanied by permanent changes to the eligibility criteria and the formula to improve access and increase funding for publishers from those communities.

As an additional economic recovery measure for the Canadian book sector, Budget 2021 announced an investment of \$32.1 million over two years (2022-23 to 2023-24) to help Canadian booksellers increase their online sales of Canadian-authored books and to improve their business model for online sales.

4.1.2. Alignment with government roles, responsibilities and priorities

Evaluation question: To what extent is the CBF aligned with government roles, responsibilities and priorities, including those related to equity, diversity and reconciliation?

Key findings:

- The CBF aligns with the responsibilities of PCH and the Government's priorities on inclusion, diversity, equity, accessibility, and reconciliation with Indigenous peoples.
- The Program made changes to its guidelines to better support publishers from racialized communities and incentivize the production and promotion of books by authors from Official Language Minority Communities (OLMC), Indigenous communities, and racialized communities.
- Barriers still exist for smaller Indigenous publishers, those owned and controlled by members of racialized communities and OLMC. It is difficult for them to meet CBF eligibility criteria, and the application process is cumbersome.

The CBF is aligned with the roles, priorities and responsibilities of the Government and PCH

The CBF is aligned with the GC's roles, priorities, and responsibilities, as well as those of PCH. The CBF is the government's primary measure for supporting Canadian books. The federal policy framework for the Canadian book industry includes:

¹² *Assessment of the Support for Distribution program, Canada Book Fund: A report by the More Canada steering committee, 2021.*

-
- Legislation such as the *Investment Canada Act* and the *Copyright Act*.
 - Policies and regulations governing foreign investment and book importation, like the Revised Foreign Investment Policy in Book Publishing and Distribution, and the Book Importation Regulations.
 - Financial support through the CBF as well as the Canada Council for the Arts, NTPBP and Public Lending Right Program.

The Program has responded to Government priorities on inclusion, diversity, equity, accessibility, and reconciliation with Indigenous peoples

The CBF aligns with key government priorities to a certain extent, including reconciliation with Indigenous peoples, IDEA, and environmental sustainability.

Following the 2018 evaluation, the CBF made guideline changes to allow new clients and innovative projects to be funded through the SFO component. Over the five-year evaluation period, the SFO component funded an average of 21 projects annually from or for Indigenous, and OLM communities. This support extended through a temporary Recovery funding initiative during the COVID-19 pandemic to help organizations from equity groups.

In 2022, the CBF updated its guidelines to better support publishers from racialized communities and incentivize publishing works by authors from official language minority, Indigenous, and racialized communities. These changes appear to have led to greater access, but more program data is needed to assess the full impact of these measures.

Temporary new funding during the evaluation period allowed the program to better meet these priorities. In particular:

- The SFB Initiative helped new clients from equity groups, by funding 37 bookstores from Indigenous, racialized and OLM communities.
- The Accessible Digital Books initiative aimed to increase the availability of "born accessible" Canadian-authored digital titles. It sought to help the Canadian book industry to integrate accessible publishing features into the production and distribution of digital books (ebooks and audiobooks) that can be used by everyone, including persons living with a print disability. Before the initiative, few Canadian publishers produced accessible books due to high costs and unclear sales potential. The initiative, which ended in March 2024, was crucial for smaller publishers, and there is hope the CBF will continue this support.¹³

¹³ Josh O’Kane, “Future of accessible book, audiobook production in limbo as subsidy winds down,” *Globe and Mail*, June 28, 2023.

The CBF supports the environmental sustainability by incentivizing the production and sale of digital books. Stakeholders noted that the Accessible Digital Books initiative also promoted sustainable production and distribution.

Ongoing barriers could hinder access to CBF by various communities

There continues to be barriers that limit access to the CBF for equity groups. In SFO, the key challenge limiting access is the oversubscription of the program and recurrence of supported projects. Additional challenges are:

- eligibility thresholds in SFP that are difficult to achieve for smaller publishers;
- application processes and bureaucratic language in program documents favoring those with greater capacity;
- limited outreach to equity communities, resulting in lower understanding or prioritization of their needs; and
- gaps in data collection regarding equity groups.

An industry engagement report highlighted challenges for Black, Indigenous, and People of Colour (BIPOC) in starting their own publishing companies due to lack of capital and high thresholds set by granting agencies.¹⁴ The report noted the important barrier posed by complex grant language, especially for those without mentors or affiliations with established grant-receiving entities. Another issue raised by informants was the lack of diverse representation in industry leadership.

¹⁴ Archipel Research & Consulting, Inc., *Indigenous and Equity Deserving Stakeholders of the Canadian Book Publishing Industry on the Renewal of the Canada Book Fund*, Prepared for the Book Publishing Policy and Program Directorate of the Department of Canadian Heritage, January 10, 2024.

4.2. Effectiveness

This section presents the evaluation findings regarding the achievement of intended outcomes.

Evaluation question: To what extent is the CBF achieving its intended outcomes?

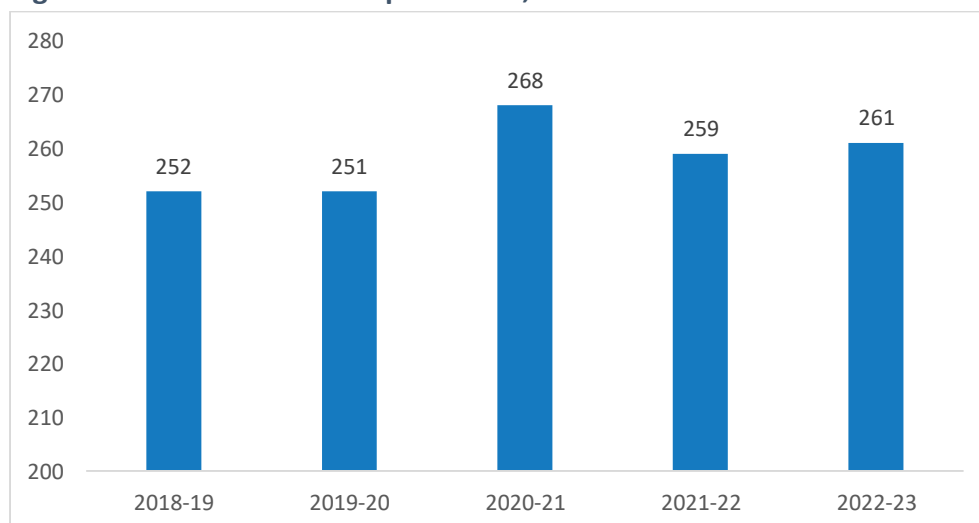
Key findings:

- The CBF is meeting its immediate and intermediate outcomes and contributing to the achievement of its ultimate outcome.
- The program supported many Canadian-owned publishers across the country, in both English and French, and various genres. The CBF helped publish over 27,000 new titles during the evaluation period (2020-21 data is not included in the calculation). It also boosted demand for Canadian-authored books through domestic and international marketing and promoted technological innovation by funding projects to improve data collection and industry insights.
- Over time, increased sales and exports have supported the growth of the Canadian book publishing industry.
- There is some evidence of results achieved through the two special initiatives delivered through the CBF. The SFB Initiative successfully helped booksellers increase their online book sales. Assessing the success of the Accessible Digital Books initiative was difficult due to the limited availability of data for the period covered by the evaluation.

4.2.1. Immediate outcome: A broad range of Canadian-owned publishers invest in ongoing publishing operations

The evaluation confirms that the CBF helps maintain a diverse group of Canadian-owned publishers. The CBF supported between 251 and 268 publishers annually across the country (Figure 1). Emergency funds during COVID-19 enabled the CBF to support even more publishers in 2020-21.

Figure 1: Number of funded publishers, 2018-19 to 2022-23

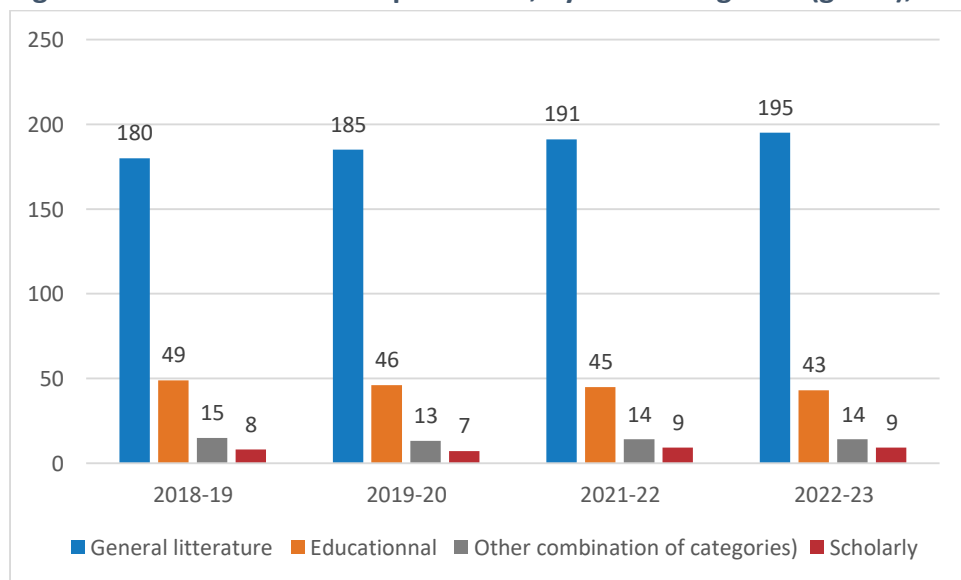


Source: Canada Book Fund

Publishers in all ten provinces and Nunavut received support. Quebec had the most publishers, followed by Ontario, British Columbia and Alberta. The CBF supported roughly the same number of English and French-language publishers, with an average of 128 in each language market.

The CBF funded publishers from various market segments, including general interest literature (trade), educational, and scholarly books (Figure 2). By far, most of the support went to general interest literature (trade) publishers (74%), followed by educational publishers (18%).

Figure 2: Number of funded publishers, by market segment (genre), 2018-19 to 2022-23



Source: Canada Book Fund

Note: Data for 2020-21 was not available.

4.2.2. Immediate Outcome: Marketing initiatives build demand for Canadian-authored books

The CBF helps boost demand for Canadian books through support for marketing, promotion, and export activities. On average, 43 marketing initiatives (including accessible publishing projects) were approved each year by SFO.

In addition to support for marketing through the SFO component, an additional 89 marketing and shipping projects were approved through the SFP component to aid pandemic recovery in 2022-23. The CBF also

provided close to \$1.1 million¹⁵ annually to the Foreign Rights Marketing Assistance Program (FRMAP) through Livres Canada Books (LCB), which helps develop export markets for Canadian-authored books.

An industry consortium, Canada FBM2020, was established during the evaluation period to manage Canadian publishers' participation in the FBM, with support from the CBF and the Creative Export Strategy. This increased the visibility of Canadian authors and their books in Germany and worldwide, boosting sales in the German market and generating new interest from international buyers.

Key informants highlighted that the CBF support for participation in local and international book fairs promotes Canadian authors and raises their visibility. Stakeholders emphasized the importance of collective marketing and promotion projects, especially for smaller publishers, and noted that marketing remains crucial for publishers.

4.2.3. Immediate outcome: Collective projects foster technological innovation and encourage the adoption of industry-wide best practices

The SFO component of the CBF supported the growth of innovative technology projects to enhance industry intelligence. During the evaluation period, the CBF funded 39 technology projects. Key informants noted that these projects created centralized and standardized data systems, improving business intelligence on book sales and distribution. Additionally, they mentioned that SFO made investments in the *Société de gestion de la Banque de titres de langue française (BTLF)* to improve interfaces and develop other tools for existing technologies to assist publishers, as well as in Booknet Canada. Stakeholders emphasized that these technology projects remain a priority for the industry.

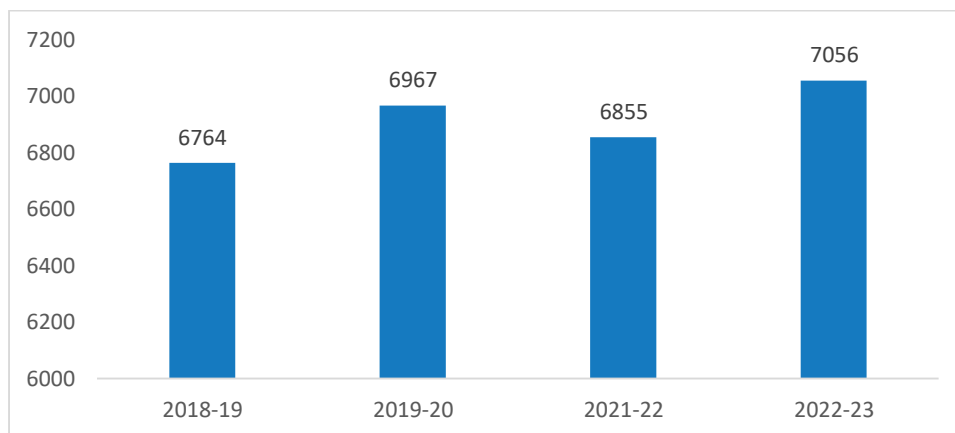
Consultations with industry stakeholders revealed that the SFB initiative boosted demand for high-quality metadata on Canadian books. Additionally, technological literacy remains an issue in the book industry due to difficulties in retaining trained staff, particularly in technology-related positions.

4.2.4. Intermediate outcome: Readers everywhere have access to a broad range of Canadian-authored books

The CBF surpassed its target of supporting the publication of 6,000 new Canadian book each year. CBF recipients published a total of 27,642 new Canadian-authored books during the evaluation period. This ranged from 6,764 new titles in 2018-19 to 7,056 in 2022-23 (Figure 3).

Figure 3: Number of new Canadian-authored books published by CBF recipients, 2018-19 to 2022-23

¹⁵ During the evaluation period, the funding allocated to LCB for FRMAP assistance to publishers participating in international trade shows fluctuated between \$850,000 and \$900,000. The remainder was used for other FRMAP-related expenses.



Source: Canada Book Fund

Note: Data for 2020-21 was not available.

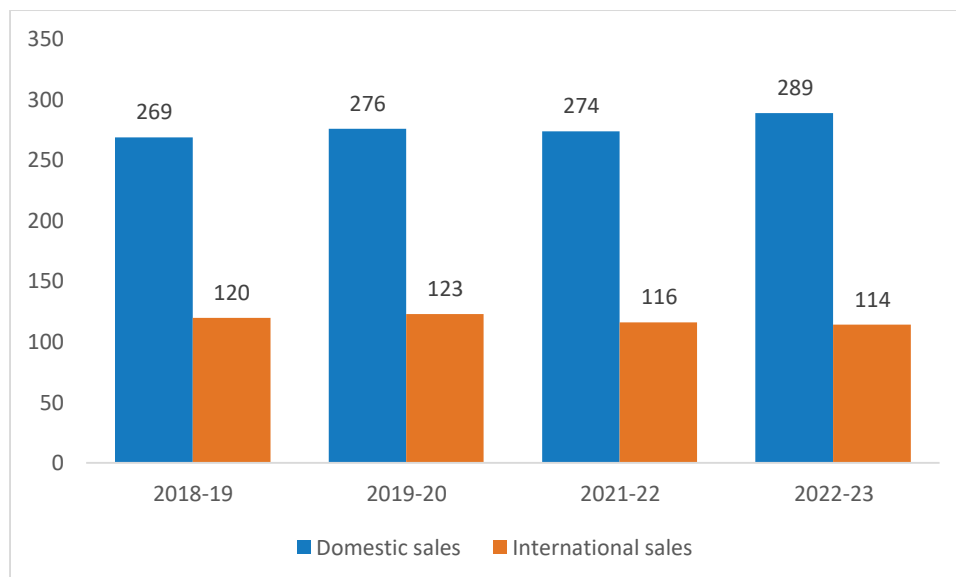
The CBF supported the publication of Canadian-authored books in English, French and other languages. Half of the new titles were published in French, 43% in English, and 7% in other languages. Each year, between 60% and 65% of these new titles were also published in digital format, meeting the growing demand for digital books.

Many key informants were of the view that without the help of the program, it would be much more difficult to produce and sell books by Canadian authors. As noted earlier, they referenced the challenges facing the industry, including rising costs, the lack of access to domestic markets and significant foreign competition.

4.2.5. Ultimate outcome: Readers everywhere consume a broad range of Canadian-authored books

The CBF contributed to the achievement of its ultimate outcome that readers everywhere consume a wide range of Canadian-authored books. The review of administrative data shows that Canadian books are being widely read both in Canada and internationally. Publishers supported by the CBF generated about \$400 million in sales of Canadian-authored books annually, including over \$100 million in exports to nearly 100 international markets. In each year examined, the CBF exceeded its domestic sales target of \$250 million and its international sales target of \$100 million (Figure 4).

Figure 4 : Domestic and international sales of Canadian-authored books by CBF recipients (in \$M), 2018-19 to 2022-23



Source: Canada Book Fund

Note: Data for 2020-21 was not available.

The participation in international book fairs and other promotional activities has helped boost the global consumption of books by Canadian authors. Over the long term, the Canadian book publishing industry has seen significant growth. There are nearly three times as many Canadian-owned publishers as there were when the program was created in 1979, four times as many books published each year by Canadian firms, and five times as many Canadian authors.

4.2.6. Achievement of objectives of special initiatives

The SFB initiative helped bookstores recover from the pandemic

The SFB initiative helped Canadian bookstores recover after the pandemic by providing temporary support for the costs associated with online sales. Subsidizing postage costs positively impacted sales.

In 2022-23, its first year, 189 recipients received SFB funding. This included 180 large and small bookstore chains and independent bookstores, which received \$12 million through the initiative's formula component.

The initiative met its goal of ensuring that at least 25% of the support provided to large bookstore chains was reinvested in promoting Canadian books. In fact, administrative data shows that the large bookstore chains reinvested even more than the 25 % that was required by their contribution agreements.

Additionally, nine projects received \$1.32 million for collective projects supporting online sales through a dedicated envelope in SFO. However, some activities were delayed in the first year because recipients were unsure about the amount of funding available.

The Accessible Digital Books initiative supported the publishing of accessible digital books

The Accessible Digital Books initiative made progress towards its objectives by supporting activities related to publishing accessible digital books. These activities included business planning, internships, accessible audiobook conversion, increasing accessible publishing capacity in Canada, developing and promoting best practices, and implementing industry standards and certification.

From 2019-20 to 2022-23, the SFP component supported close to 300 projects for accessible audiobooks with a total of approximately \$9.5 million and SFO component funded 54 accessible digital books projects for a total of \$7.0 million. Key informants noted that producing accessible digital books is costly and not driven by consumer demand alone. They believed that the initiative helped develop skills and knowledge in accessible formats, positioning Canada as a leader in publishing accessible books. This leadership is timely, as major markets in Europe will require all new digital titles to be accessible by 2025.

4.3. Efficiency

This section presents the findings on the CBF's efficiency.

Evaluation question: To what extent is the CBF efficiently delivered?

Key findings:

- The CBF is well managed, with spending and staffing levels mostly aligned with plans, except during the initial part of the COVID-19 pandemic. The program's administrative costs are reasonable and lower compared to the period covered by the previous evaluation. The CBF efficiently handled extra COVID-19 funds with minimal additional resources.
- The CBF met most service standards. Stakeholders had positive interactions with program staff.
- Overall, the program model, especially the formula-based SFP funding, is efficient.
- However, there are some challenges posed by the funding model and delivery mechanisms. In particular: 1) smaller publishers and those from equity communities struggle to meet the SFP eligibility criteria; 2) there is not a way to support the translation of non-literary books; 3) the SFO component model has a complicated application process with recurrent clients and the need for multiple applications, leading to slower processing and decision-making.
- There are some issues with the availability and the quality of performance measurement to support decision-making and reporting on results. Data is collected, but some measures need better definitions, especially for tracking IDEA priorities and collective marketing outcomes.

4.3.1. Efficiency in the management of program resources

Actual spending aligned closely with plans

Spending and staffing levels were mostly aligned with plans, except during the years the most impacted by the COVID-19 pandemic when unplanned emergency support for the sector was rapidly made available. In the first

3 years of the evaluation period, the variance was averaged 3.8%. However, in 2021-22 and 2022-23, the difference between planned and actual spending¹⁶ was between 18.7% and 19.8% ([Annex B](#), Table B-11).

Due to new initiatives launched during the period, operating costs rose by 43%, from \$3 million to \$4.3 million. The number of program employees grew by 38%, from 28.7 full-time equivalents (FTEs) in 2018-19 to 39.7 in 2022-23. Additionally, the difference between planned and actual FTEs was as high as 15%, with the biggest difference in 2021-22 (4.2 FTEs).

The CBF exceeded its planned spending by \$29.6 million over the evaluation period, with almost all (94%) of this variance due to increased spending in Gs&Cs. Of the increased spending of \$28.1 million in Gs&Cs compared to planned, \$26.1 million was in COVID-19 funding in 2020-21 and 2021-22 (see [Annex B](#), Table B-12).

Despite this, the administrative costs stayed stable. Emergency measures in SFO and SFP were managed with existing staff, increasing their workload and creating strain on resources.

The administrative ratio was relatively low

As shown in Table 6, a total of \$265.3 million was spent between 2018-19 and 2022-23, \$248.3 million in Gs&Cs and \$17.0 million in operating expenditures. The program's administrative ratio, which represents O&M expenditures as a percentage of total expenditures, ranged from 5.0% to 7.5%. With an average of 6.4%, the administrative ratio is lower than the one calculated in the previous evaluation (8.0%).

Table 6: CBF administrative ratio (\$M)

Resources	2018-19	2019-20	2020-21	2021-22	2022-23	Total
Operating expenditures	3.0	3.0	3.3	3.5	4.3	17.0
G&C expenditures	36.9	40.6	61.2	48.4	61.2	248.3
Total program expenditure	39.9	43.6	64.5	51.9	65.5	265.3
Administrative ratio (%)	7.5	6.9	5.0	6.7	6.6	6.4

Source: Financial Planning and Resource Management, Chief Financial Officer Branch PCH

Note: Funding amounts are rounded, which explains the difference in some totals.

4.3.2. Evidence of an efficient program design and delivery

There was good satisfaction with program service delivery

Stakeholders generally agreed that the CBF's design and delivery is efficient and well-managed. They reported that the CBF is well suited to address the needs of the book industry.

¹⁶ This refers to program operating expenses.

The CBF met its target of achieving 80% of service standards almost all of the time, except in 2020-21 which was impacted by COVID-19 ([Annex B](#), Table B-13).

Most stakeholders commented positively on their interactions with program staff. They highlighted the contribution of program officers in the management of additional emergency and recovery funds and other special initiatives. Stakeholders appreciated the program's responsiveness, collaboration and understanding. Having a dedicated program officer was particularly appreciated by some who mentioned that an ongoing relationship with the program officer was helpful.

The program funding model appears efficient, but areas for improvements were identified

The formula-based funding provided through the SFP component appears appropriate and supports the vast majority of publishers who apply to the program. Equity measures integrated into SFP to support smaller publishers are considered effective in developing their growth.

The evaluation identifies areas for possible improvement in the SFP model. Some eligibility criteria still limit access to smaller publishers and those from equity communities. The CBF already lowered thresholds as it relates to the quantitative eligibility criteria for publishers from equity communities. Despite this, there are publishers which do not have access to the program because they do not reach \$30,000 in annual sales. Publishers have noted that recent changes in increasing the sales coefficient for books by Indigenous, official-language minority, and racialized authors has boosted sales. However, it requires publishers to gather and report sensitive personal information, which can be costly and risky.

The design of the SFO component is appreciated for supporting a range of projects, including technological initiatives, marketing efforts, and, more recently, accessible digital books. Stakeholders value initiatives that support market development and industry intelligence.

However, there were some areas identified for improvement. Stakeholders suggest that new or ongoing investments in government priorities, such as reconciliation with Indigenous peoples and IDEA, should be integrated into the existing program guidelines. This would improve the achievement of results and streamline the application process for both recipients and program officers.

Particular issues in the SFO model impact efficient delivery:

- **High application volume and workload:** Although the SFO stream made certain progress in its use of multi-year funding and the more streamlined review process, most of its applicants are low risk recurrent clients with recurrent activities that are applying and being assessed annually. In this view, further consideration could be given to the greater use of multi-year funding, greater application of the existing streamlined assessment process, as well as introduction of other mechanisms to assess applications from recurrent, low-risk clients.
- **Technology projects have longer timelines:** Technology projects often run longer than a year and may need to be adapted during development. They are not well-suited to annual funding and reporting, as

per the current SFO approach.

- **Decision and payment turnaround times are long:** The 26-week standard for funding decisions is viewed as overly long. Delays in obtaining funding decisions make it difficult for stakeholders to plan activities, especially when other funding levels depend on federal funding.
- **Complicated application and reporting processes:** The application process and reporting requirements could be more standardized. Stakeholders noted inconsistencies in application instructions, feedback, and reporting requirements from year to year. While a six-month interim report may be easier to complete than a cumulative 12- to 18-month report, as it would require less retrospective information, there are concerns about repetitive reporting. Challenges with editing the program's PDF documents were also mentioned.

The FRMAP, managed by LCB through a further distribution model, appears appropriate and is viewed positively by key informants. It's a well managed program, the applications are easy to complete, and the team is effective. LCB plays an important role in terms of promotion of Canadian-authored books by carrying out initiatives such as the FBM, market development and intelligence.

The evaluation identified a gap in funding for the translation of non-fiction (non-literary) books. Increased demand for Canadian books in Germany, driven by investments related to Canada's presence as Guest of Honour at the FBM in 2020 and 2021, highlights the commercial potential of these translations. Funding by NTPBP for translating Canadian books into German for the FBM was successful, and stakeholders are generally positive about developing a similar program to support non-fiction translations.

4.3.3. Evidence of the appropriateness and usefulness of performance measures for reporting and decision-making

Performance measurement is appropriate, although some indicators could be improved

Performance measurement for the program is suitable. Stakeholders agree with the fund's commercial goals, as shown by the sales of Canadian books. The program effectively tracks other indicators to report on outcomes.

However, there is ongoing confusion about the definition of Canadian books, specifically whether these are books authored by Canadians or books published in Canada. The evidence confirms that only Canadian-authored books count towards Publishing Support funding eligibility, but some stakeholders are concerned about different definitions used across the different program components in the past few years. In particular, they noted that the definitions used in the SFB and Support for distribution components were not the same as in the SFP. Furthermore, there were questions raised related to whether these definitions were in contradiction to the objective of growing sales of Canadian-authored published books.

The Program made updates to the guidelines and eligibility criteria for the SFP to address access barriers for equity groups. The number of publishers from Indigenous, racialized or official language minority communities receiving support is tracked, however, it is not used as a performance indicator and the number of publishers

owned by a member of a racialized community was not tracked at the beginning of the evaluation period. As a result, outcomes in these areas cannot be comprehensively measured using program data.

Additionally, stakeholders noted that literary events primarily serve promotional purposes, which may not always be accurately measured by immediate sales figures alone. Similarly, more commercial outcomes from trade events could be tracked, especially those with significant public investment. For instance, the FBM initiative provided strong evidence of increased demand for Canadian books in Germany due to international marketing and translation efforts.

5. Conclusions

The CBF remains relevant and performs well despite facing various pressures. The evaluation highlights the Canadian publishing industry's need for continuous investment to adapt, grow, and innovate. The industry's small size and economic limitations compared to foreign publishers, along with high production and distribution costs, continue to pose challenges.

While the COVID-19 pandemic further disrupted the supply chain and shifted the market towards online sales, the CBF effectively provided emergency support and introduced recovery initiatives, underscoring its essential role. Continued investment and strategic adjustments will ensure the CBF can support the evolving needs of the Canadian publishing industry and maintain its positive impact.

The CBF aligns with government priorities, including those related to IDEA, reconciliation with Indigenous peoples, and environmental sustainability. Adjustments to program guidelines and temporary new funding have enhanced this alignment. As these funds were temporary, and barriers persist for those authors who belong to equity groups or who are Indigenous, as well as small publishers, ongoing and expanded support is merited.

The CBF has positively impacted the production, marketing, and dissemination of Canadian-authored books, ensuring a vibrant Canadian-owned publishing sector. It supports a wide array of publishers, leading to the publication of diverse titles in multiple languages and formats, with Canadian-owned publishers producing over three-quarters of new Canadian-authored books annually.

Through domestic and international marketing initiatives, the CBF has stimulated demand and increased the visibility of Canadian-authored books. Technological innovation and industry intelligence have also been fostered by the CBF, though quality metadata remains a challenge. The program has exceeded targets for the publication and sales of Canadian books, both domestically and internationally. Initiatives like SFB and the Accessible Digital Books have furthered online sales and the production of accessible digital books.

Efficiently managed, the CBF has maintained spending within planned budgets and achieved most service standards, even during the pandemic. While the program's design and delivery are generally effective, there are areas for improvement. These areas include reviewing the eligibility criteria to further support publishers from OLM, racialized and Indigenous communities, addressing gaps in funding for non-literary book

translations, and enhancing the distribution of French-language books in the English-language market. Streamlining the application and reporting processes and reducing approval times for the SFO component will also enhance efficiency.

Looking ahead, refining the program's logic model and performance measurement will better capture progress towards government priorities and marketing outcomes.

6. Recommendations, management response and action plan

The evaluation offers the following three recommendations:

Recommendation 1
The Senior Assistant Deputy Minister, Cultural Affairs Sector, should further improve program design and delivery by reviewing application and reporting processes and ensuring the CBF better responds to the evolving needs of the industry.
Management response
The Senior Assistant Deputy Minister, Cultural Affairs Sector, agrees with the recommendation. The Department conducted an industry engagement process in 2023 on how to further support the growth of the Canadian publishing sector through the CBF, in parallel with this program evaluation. The process covered many priority areas identified in this report, including diversity and inclusion, accessible publishing, export and greening practices. Opportunities to improve program design to better prioritize and support these areas under the existing program framework and with the addition of a Budget 2024 investment of \$10 million over three years were identified. Within these program changes, the CBF will also take steps to start to address other gaps or pressures identified in this evaluation. Increased support for core activities under Support for Publishers (SFP) and Support for Organizations (SFO) is intended to help relieve some of the pressure of increasing costs of distribution and production for individual publishers. For translation of non-literary works, the CBF does not currently have the mandate to provide direct support and it is beyond the scope of the program currently delivered by the Canada Council for the Arts. The CBF is planning to temporarily increase already existing program incentives for export and translation for the duration of the three-year Budget 2024 investment, both of which should benefit publishers active in this area. Industry engagement will continue to determine if further action is required, with future delivery options explored and additional funds sought if needed. Since the evaluation period concluded, the program has also taken steps to improve program delivery, namely by modernizing the application process for publishers, who represent the largest recipient base of the program. Further changes to improve application and reporting processes and reduce administrative

burden were raised in the 2023 industry engagement sessions. Additional changes will be considered to further simplify and streamline program delivery in key areas.

The report concludes that, over the evaluation period, CBF was relevant, effective and efficient. It should be noted that this was achieved during a period of extraordinary temporary support both for book publishers and other sectors of the book industry. The CBF will strive to continue to meet the needs of the book industry and attain its objectives for Canadians with its base budget and the three-year \$10 million investment in the program announced in Budget 2024.

Table 7: Recommendation 1 – Action Plan

Action Plan Item	Deliverable(s)	Implementation Date	Program Official Responsible
1.1. Identify program design changes that can support evolving industry needs and program priorities within the parliamentary appropriations.	1.1.1. Implementation plan for program changes aimed at enhancing incentives for export, accessible publishing, diversity and inclusion, and prioritizing greening practices.	December 2024	Director General, Creative Industries and Trade Branch
1.2. Implement program design changes.	1.2.1. Updated application guidelines and forms.	April 2025	Director General, Creative Industries and Trade Branch
1.3. Implement program delivery changes to improve the application and reporting processes.	1.3.1. Onboarding to the Canadian Heritage Funding Portal – Publishing Support and Business Development.	April 2026	Director General, Creative Industries and Trade Branch
	1.3.2. Updated guidelines and forms with changes to reduce reporting requirements and other barriers to access.		
Full Implementation Date: April 2026			

Recommendation 2

The Senior Assistant Deputy Minister, Cultural Affairs Sector, should better define how the CBF will address barriers and further support members of Indigenous, equity and official language minority groups within existing resources.

Management response

The Senior Assistant Deputy Minister, Cultural Affairs Sector, agrees with the recommendation.

The CBF recognizes how critical it is to understand the challenges and needs of members of Indigenous, official language minority and racialized communities in the book publishing sector and to address any barriers they encounter. During the 2023 engagement sessions on program renewal, dedicated sharing circles and interviews were organized to ensure perspectives from these communities were heard.

While the CBF already offers special consideration to applicants who are owned by, represent, or serve members of these communities, the stakeholder engagement sessions and the program evaluation process brought to light remaining barriers for them within the CBF. The program is committed to working towards removal or reduction of these barriers, such as looking for special measures to improve access to the program components.

The program recognizes the ways in which it engages with the industry evolved significantly during the evaluation period. Current engagement mechanisms will be reviewed to ensure the program can effectively engage with industry on the pressures and gaps identified in this evaluation report, including clearly identifying mechanisms for engaging members of equity communities. The program will also continue to monitor the impact of inflationary pressures on publishing costs and translation needs and bring forward any recommendations for further adjustments or additional funding as needed.

For the specific emerging gap identified in the report on the availability of French-language books outside Quebec that impacts official language minority communities and the promotion of official languages in Canada, the issue is complex, and the sector appears to be at the stage of exploring options. Initial discussions have started on potential work by industry organizations on this issue. A dedicated engagement session to further explore the challenges involved will be planned.

Table 8: Recommendation 2 – Action Plan

Action Plan Item	Deliverable(s)	Implementation Date	Program Official Responsible
2.1. Implement program changes to further reduce barriers to entry and prioritize funding for members of Indigenous, racialized, and official language minority communities and publishers that publish books authored by members of these communities.	2.1.1. Implementation plan for program changes which includes specific measures to further reduce barriers and prioritize funding for members of Indigenous, racialized, and official language minority communities and publishers that publish books authored by members of these communities.	August 2026	Director General, Creative Industries and Trade Branch
	2.1.2. Targets for equity publishers linked to the implementation plan.		
	2.1.3. Updated application guidelines and forms.		
	2.1.4. Measurement of progress against targets at the end of the first year of implementation.		
2.2. Develop a renewed outreach plan which clearly identifies the mechanisms to be used to reach stakeholders who are members of Indigenous, racialized and official language minority communities and to further explore the challenges around the availability of French-language books outside Quebec.	2.2.1. Outreach and engagement plan for 2025-26.	August 2026	Director, Book Publishing Policy and Programs Directorate
	2.2.2. Summary of outreach activities / engagement sessions held.		
Full Implementation Date: August 2026			

Recommendation 3

The Senior Assistant Deputy Minister, Cultural Affairs Sector, should make improvements to the performance measurement of the program to support ongoing decision-making and reporting on results.

Management response

The Senior Assistant Deputy Minister, Cultural Affairs Sector, agrees with the recommendation.

The program will review its performance measurement indicators to ensure data collection is as streamlined as possible while still making available strategic information to support planning, decision-making and reporting. The CBF has worked over the evaluation period to enhance its support for Indigenous, racialized, and official language minority communities, and recognizes that resulting changes to the performance measurement strategy will be required.

Table 9: Recommendation 3 – Action Plan

Action Plan Item	Deliverable(s)	Implementation Date	Program Official Responsible
3.1. Work with the PCH corporate partners to review the CBF's performance measurement strategy.	3.1.1. Summary of meetings with the PCH Corporate Partners and any other relevant partners.	April 2025	Director, Book Publishing Policy and Programs Directorate
	3.1.2. Summary of the outcome of the review and next steps if required.		
3.2. Revise the CBF's performance measurement strategy, if required.	3.2.1. Deputy Minister-approved Performance Information Profile (PIP) or explanation of why changes were not pursued.	August 2025	Director General, Creative Industries and Trade Branch
3.3. Ensure that the CBF tools, for example, contribution agreement and associated application and reporting forms, align with the updated performance measurement strategy, if required.	3.3.1. Updated CBF tools which correspond to updated performance measurement strategy, if required.	October 2026	Director General, Creative Industries and Trade Branch
Full Implementation Date: October 2026			

Annex A: Evaluation matrix

Evaluation Questions	Indicators	Document and administrative data review	Literature review	Key informant interviews
Relevance				
1. To what extent is the CBF meeting the current and changing needs of the book industry?	1.1 Evidence* that the CBF takes into account the current and changing needs of the book industry (publishers, organizations and bookstores)	Yes	Yes	Yes
	1.2 Evidence that the CBF adapted and responded favourably to industry needs during the pandemic	Yes	Yes	Yes
2. To what extent is the CBF aligned with government roles, responsibilities and priorities, including those related to equity, diversity, diversity and inclusion, and reconciliation?	2.1 Evidence that the CBF is aligned with the roles, priorities and responsibilities of the Government and PCH	Yes	Yes	Yes
	2.2 Evidence of any barriers that could hinder access to the CBF by various communities	Yes	Yes	Yes
Effectiveness				
3. To what extent is the CBF achieving its intended outcomes?	3.1 Evidence that the CBF has achieved its immediate outcomes	Yes	No	Yes
	3.2 Evidence that the CBF has achieved its intermediate outcomes	Yes	No	Yes
	3.3 Evidence that the CBF has achieved its long-term outcomes	Yes	No	Yes
	3.4 Evidence that the special initiatives have achieved their objectives	Yes	No	Yes

Efficiency				
4. To what extent is the CBF efficiently delivered?	4.1 Evidence that the CBF is efficient in the management of program resources (administrative ratio, planned vs. actual expenditures and trends, service standards, etc.)	Yes	No	Yes
	4.2 Evidence of the effectiveness of program design and implementation or barriers to program delivery	Yes	No	Yes
	4.3 Evidence on the appropriateness and usefulness of performance measures for reporting and decision-making	Yes	No	Yes
* Evidence refers to conclusive data and views of key stakeholders collected and analyzed as part of the evaluation.				

Annexe B: Additional tables

Table B-10: Number of funded publishers, by province/territory, 2018-19 to 2022-23

Province/territory	2018-19	2019-20	2020-21	2021-22	2022-23
Alberta	12	15	16	16	14
British Columbia	27	30	33	34	32
Manitoba	9	7	7	8	9
New Brunswick	3	3	4	4	3
Newfoundland and Labrador	4	5	6	6	6
Nova Scotia	8	8	9	8	8
Nunavut	1	1	1	1	2
Ontario	61	56	61	56	56
Prince Edward Island	1	1	1	1	2
Quebec	122	122	128	123	127
Saskatchewan	4	3	2	2	2
Total	252	251	268	259	261

Source: Canada Book Fund

Table B-11: Planned vs. actual expenditure and human resources (\$M)

Fiscal year	Reference Spending (\$M)	Actuals Spending (\$M)	Actuals/Reference Spending (%)	Reference (FTE)	Actuals (FTE)	Actuals/Reference (FTE) (%)
2018-19	3.1	3.0	96.5	28.7	28.7	100
2019-20	2.9	3.0	103.5	26.4	29.1	110.2
2020-21	2.9	3.3	111.6	27.3	29.1	106.6
2021-22	2.9	3.5	118.7	28.4	32.6	114.8
2022-23	3.6	4.3	119.8	37.8	39.7	105

Source: Financial Planning and Resource Management, Chief Financial Officer Branch PCH

Note: Funding amounts are rounded, which explains the difference in some totals.

Table B-12: Planned vs. actual G&C expenditures (\$M)

Fiscal Year	Reference Spending (M\$)	Actuals Spending (M\$)	Actuals/Reference (%)
2018-19	36.7	36.9	100.6
2019-20	37.2	40.6	109.1
2020-21	42.2	61.2	145.0
2021-22	43.2	48.4	112.0
2022-23	61.0	61.2	100.3

Source: Financial Planning and Resource Management, Chief Financial Officer Branch PCH

Note: Funding amounts are rounded, which explains the difference in some totals.

Table B-13-A10: Compliance with Service Standards, SFP and SFO, 2018-19 to 2021-22* - Acknowledgement of Receipt of Application

Component/ Sub-component	Fiscal year	# Files	Standard Weeks	Compliance (%)
SFP - Business Development	2018-19	36	2	100
	2019-20	66	2	100
	2020-21	49	2	100
	2021-22	53	2	100
SFP - Publishing Support	2018-19	240	2	100
	2019-20	247	2	100
	2020-21	643	2	98
	2021-22	276	2	97
SFO	2018-19	62	2	98
	2019-20	85	2	96
	2020-21	112	2	97
	2021-22	98	2	100

Source: Service standards results for PCH funded programs, <https://www.canada.ca/en/canadian-heritage/services/funding/service-standards/service-standards-results.html>

*Data for 2022-23 was not available.

Table B-13-B11: Compliance with Service Standards, SFP and SFO, 2018-19 to 2021-22* - Funding decisions

Component/ Sub-component	Fiscal year	# Files	Standard Weeks	Compliance (%)
SFP - Business Development	2018-19	42	14	98
	2019-20	53	14	94
	2020-21	40	14	75
	2021-22	59	14	98
SFP - Publishing Support	2018-19	257	28	100
	2019-20	332	28	100
	2020-21	617	28	100
	2021-22	348	28	100
SFO	2018-19	57	26	84
	2019-20	74	26	86
	2020-21	125	26	79
	2021-22	84	26	87

Source: Service standards results for PCH funded programs, <https://www.canada.ca/en/canadian-heritage/services/funding/service-standards/service-standards-results.html>

*Data for 2022-23 was not available.

Table B-13-C12: Compliance with Service Standards, SFP and SFO, 2018-19 to 2021-22* - Payments

Component/ Sub-component	Fiscal year	# Files	Standard Weeks	Compliance (%)
SFP - Business Development	2018-19	19	4	95
	2019-20	45	4	98
	2020-21	23	4	74
	2021-22	27	4	85
SFP - Publishing Support	2018-19	246	4	100
	2019-20	316	4	99
	2020-21	63	4	89
	2021-22	125	4	99
SFO	2018-19	47	4	85
	2019-20	57	4	86
	2020-21	60	4	78
	2021-22	58	4	72

Source: Service standards results for PCH funded programs, <https://www.canada.ca/en/canadian-heritage/services/funding/service-standards/service-standards-results.html>

*Data for 2022-23 was not available.

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