

Summary of the Evaluation of the Canada Media Fund Program (2014-15 to 2018-19)

OVERVIEW

This evaluation examined Canadian Heritage's (PCH) contribution to the **Canada Media Fund (CMF)** which supports the development, production, distribution and consumption of Canadian content and relevant applications across all audiovisual platforms.

Governance

PCH's **Canada Media Fund Program**, part of the Broadcasting, Copyright and Creative Marketplace Branch, manages the federal contribution to CMF.

The independent not-for-profit **Canada Media Fund Corporation** administers the CMF.

Telefilm Canada carries out day-to-day program delivery.

FINDINGS

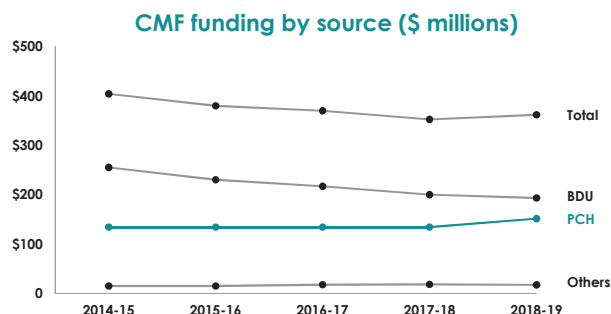
Environment and context

Amidst the decline of broadcast distribution undertakings revenue from television consumption, **PCH provides a reliable source of funding to the CMF's annual budget.**



CMF receives revenue from a number of sources including:

- ◆ Broadcast distribution undertakings (BDU)
- ◆ PCH's Canada Media Fund Program
- ◆ Self-generated revenues from interest, revenues and recoveries on production investments
- ◆ Contributions from regulatory commitments



CMF was responsive to changes in the media industry and the funding eco-system.



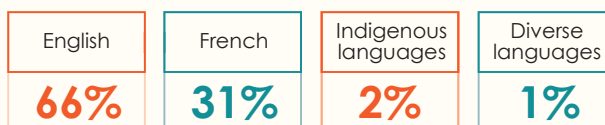
- ◆ CMF **supported broader federal cultural programs** such as the Cultural Export Strategy.
- ◆ The Program and the Corporation **modified contribution agreements** annually to address evolving industry needs.
- ◆ The Corporation **developed initiatives to enhance discoverability of Canadian content online.**
- ◆ CMF **encouraged representation from various equity-seeking groups** notably for:
 - ◆ Indigenous production
 - ◆ Gender parity in key creative positions
 - ◆ Official language minority communities
 - ◆ Regional production

- ◆ Keeping pace with industry changes was slowed by a **complex interconnected legislative and regulatory environment** where significant change requires thorough consideration of the implications on various parts of the system.

FINDINGS

Raison d'être

The CMF contributed to productions in multiple languages, prioritizing Canada's Official Languages.



FINDINGS

Raison d'être (cont'd)

CMF played an essential role in financing Canadian audiovisual content.

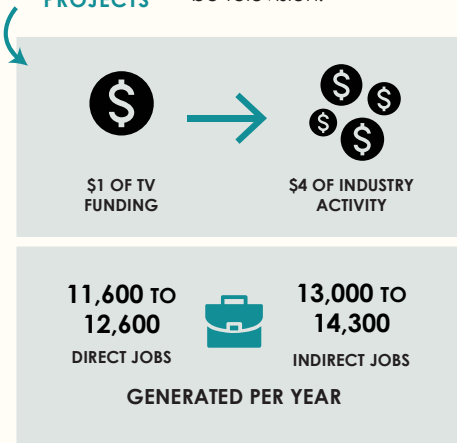
- CMF contributed to **+3,000 projects**, primarily through 2 program streams:

+2,500
CONVERGENT
PROJECTS

content that appears on at least two platforms, one of which must be television.

+500
EXPERIMENTAL
PROJECTS

cutting-edge interactive digital content, software applications, and web series.



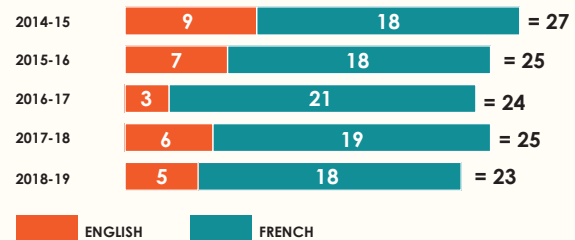
CMF funding by source (\$ millions)

Funding Year	Applications received	Convergent Stream		Experimental Stream	
		Projects funded	Funding	Projects funded	Funding
2014-15	1,981	505	\$311.3	108	\$38.6
2015-16	2,070	541	\$314.9	104	\$40.5
2016-17	1,976	530	\$306.0	96	\$40.4
2017-18	2,010	497	\$284.6	103	\$40.0
2018-19	1,810	493	\$285.3	116	\$42.0
Total*	9,847	2,566	\$1,502.1	527	\$201.5

*This table does not include the Performance envelope allocation for Broadcasters.

- Numerous projects were funded by CMF and:
 - received **over 1,000 awards** in Canada and abroad
 - met the targeted **14 million visits annually** for Convergent digital projects
 - approximately **25 television projects per year drew audiences of over 1 million viewers**, the majority French-language programs.
 - content was viewed on average **3.4 hours per week (French)** and **1.4 hours per week (English)**

CMF-funded television programs with audiences of over 1 million viewers in Canada



FINDINGS

Looking forward

The Program and federal government will be required to adapt further in order to respond to:

TRENDS AND CHALLENGES

- Decrease in traditional television
→ **Existing funding model under pressure**
- Growing popularity of global over-the-top services
→ **National regulatory systems challenged**
- Increase in multiplatform and online consumption
→ **Data sharing, ownership, security, and analysis issues**

OPPORTUNITIES FOR CREATORS

- Technological advances can offer **minimal-cost ways to produce content**
- New instant storytelling** through social media, artificial intelligence, and immersive technologies

RECOMMENDATIONS

The evaluation recommends that the Senior Assistant Deputy Minister, Cultural Affairs:

1 Reviews and further improves the CMF policy and performance frameworks to reflect the shifts in the industry towards multi-platform and online media consumption and ensure that the data collected is relevant and useful in measuring the consumption, promotion, and success of the CMF funded projects in the digital era.

2 Pursues further opportunities to promote diversity and inclusion initiatives through the CMF by expanding these efforts with other key groups, such as Indigenous, racialized, and LGBTQ2S communities.