What we heard across Canada: Canadian Culture in a Digital World

CONSULTATION REPORT
FEBRUARY 21st, 2017

Ce document de consultation est également disponible en français.
POLITICAL NEUTRALITY STATEMENT

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Mike Colledge
President
Ipsos Public Affairs Canada
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Ipsos was commissioned by the Department of Canadian Heritage (PCH) to conduct the Canadian Content in a Digital World Consultation, which sought to strengthen the creation, discovery and export of Canadian content in a digital world. This consultation addressed both information and entertainment content related to television, film, radio, digital media and platforms, video games, music, books, newspaper and magazines.

As the 150th anniversary of Confederation approaches, it is important for Canada to undertake this review in order to ensure that Canada’s voice remains unique and available to Canadians across the country. This needs to be done to ensure Canada’s cultural industries stay in step with technological and communications advancements.

The rapid pace of the emergence and expansion of digital technologies presents many opportunities for Canada, as well as challenges in ensuring that Canada remains competitive in a global market in terms of distributing and discovering Canadian content. With more and more Canadians opting to “cut the cord” and increased use of online platforms for accessing information and entertainment content, it is more important than ever to ensure a Canadian perspective is available across the country and around the world. This includes content presented in television, radio, film, digital media and platforms, video games, music, books, newspapers and magazines. All creators, cultural stakeholders and citizens have a stake in the future of the creative economy.

In order to achieve this, Ipsos spoke with Canadian citizens, creators and cultural stakeholders to identify these opportunities and understand the role the federal government can play in directing and guiding the creative sector through such changes so that Canadians can be best positioned to maximize their potential, both as creators and as consumers of content.

Why Canadian content in a digital world?

The Department of Canadian Heritage initiated this consultation process to review the current measures taken to ensure that Canada’s culture remains strong and competitive within the global landscape.
What are we trying to achieve?

Ultimately, the Department of Canadian Heritage sought to gain insights from a wide range of creators, cultural stakeholders and citizens in order to identify what needs to be done to continue to support Canada’s creative economy. This includes support for creators and cultural entrepreneurs to adapt to the new digital environment and plan for the years ahead.

This report highlights the key themes and messages heard from these interested parties over the course of the consultation period.

The core questions of the consultation process were:
1. What does a cultural system that supports creators and respects citizen choice look like to you?
2. How can we meet the challenge of promoting Canada’s creativity in the digital world and how can we use content to promote a strong democracy?
3. How do we support Canada’s artists, content creators and cultural entrepreneurs in order to create a cultural ecosystem in which they thrive and that will benefit the growth of our middle class at home, and help them reach beyond our borders?

The Department of Canadian Heritage (PCH) will use the results of the roundtables and the public consultation, as well as its consultation with industry experts and input from the Expert Advisory Group (EAG), to develop the policies that will guide Canada’s cultural policy toolkit going forward.
Who did we hear from?

**CONTRIBUTORS**

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<tr>
<th>Source</th>
<th>In Person</th>
<th>Online Portal</th>
<th>Social Media</th>
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**CONTRIBUTIONS**

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<tr>
<td>(2 hours *5 events *6 tables per session)</td>
<td>60+ hrs of discussion</td>
<td>824</td>
<td>11,569</td>
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<tr>
<td>EngagementHQ Platform</td>
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<tr>
<td>TweetReach</td>
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**INTRODUCTION**

- Academic
- Actor
- Labour Organisation/Union
- Traditional Industry
- Student
- Creator of Cultural Content
- Music
- New Industry
- ISP
- Author
- Creators
- Journalist or Other Member of the Media
- Legal Representative
- Guild
- Agent
- Individual
- Screenwriter
- Production Company
- Ministry
- Distributor
- Charity
- Media
- Writer
- Printed Media
- Educator
- Book
- Expert/Academic
- Artist
- Canadian Culture/Media Consumer
- Television
- Cultural Industry Stakeholder
- Digital Media
- Film
- Policy Maker
- Industry Association/Guild
- Broadcaster
- Cultural Organization
- Stakeholder from Other Industries

**KEY MEASURES**

- **719,123** SOCIAL MEDIA IMPRESSIONS
- **824** TOTAL CONTRIBUTORS
- **11** PUBLIC ADDED EVENTS
- **26,936** VISITORS
- **414** IDEAS + **4,128 VOTES**
- **11,569** SOCIAL MEDIA
- **1,287** ENGAGED CONTRIBUTORS
- **158** CANADIAN STORIES
- **252** SUBMISSIONS
**ONLINE PORTAL**

<table>
<thead>
<tr>
<th>Unique Visitors</th>
<th>26,936</th>
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<td>Source: Google Analytics</td>
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<table>
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<th>Total Visits</th>
<th>39,149</th>
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<td>Source: Google Analytics</td>
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- **31.5K AWARE**
  - Visited at least one page

- **3.7K INFORMED**
  - Visited multiple pages/documents

- **1,287 ENGAGED**
  - Contributed to discussion

*Source: EngagementHQ Platform*

**IN PERSON**

- **6 CITIES**
  - 60+ hrs
  - Facilitated discussion

- **235+ PARTICIPANTS**

*Please note the session in Iqaluit was hosted by the Department of Canadian Heritage without the involvement of Ipsos.*

**SOCIAL MEDIA**

**LEVEL OF ENGAGEMENT**

- **19,313 mentions**
- **9,592 users**

*Source: SysomosMAP*

**TYPE OF ENGAGEMENT**

*Source: IBM Watson for Social Media*
**What is included in this report?**

The summary of the discussion presented in this report is not representative of Canadians’ views but offers a thematic overview of what was submitted by contributors. As such, this is not an exercise in measuring public opinion on the issues presented, rather an aggregate of the discussion and feedback heard from those who participated in the consultation exercises. Individuals who participated in the consultation by submitting comments via the online portal, in-person events and social media are referred to in this report as either ‘contributors’ or ‘participants.’

Discussion included in this report is derived from a variety of feedback mechanisms which permitted Canadians to participate in the public consultations. These included:

- **In-Person Events** – Events with industry stakeholders were held across the country to encourage dialogue on key issues and gather participant feedback.
- **Online Portal** – Within the online portal, three mechanisms for feedback were available:
  - **Share your ideas** – One-way feedback opportunity for Canadians to react to the three core consultation questions by submitting ideas and voting on ideas they liked.
  - **Canadian Stories** – A public bulletin board, designed and moderated by Ipsos, on which Canadians could post and share stories regarding Canadian cultural content.
- **Got More ideas? and Other Submissions** – Submissions made through the “Got more ideas?” submission portal and by e-mail in an unstructured format, allowing for a range of short reactions and lengthy discussion/position papers submitted on behalf of organizations and individuals.
- **Social Media Analysis** – Discussion on social media was encouraged throughout the consultation period. Ipsos conducted an analysis of social media channels where Canadians provided further input to the consultation process using the hashtags #DigiCanCon and #verselenumerique as well as broader discussions on Canada’s approach to digital content.

For further information on how the consultation was carried out, please see Appendix A.

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**LEGEND**

Throughout this report, quotes from various submissions have been included in order to illustrate the key themes in participants’ own words. The following icons have been used to indicate the consultation stream where these comments were shared.

- **Idea icon** — Ideas shared through the ideas boards on the online portal.
- **Comment icon** — Comments heard from participants during the In-Person Events.
- **Message icon** — Social media sources such as online forums and message boards (excluding Twitter).
- **Envelope icon** — Submissions and other ideas submitted via e-mail and through the portal.
- **Quote icon** — Twitter comments have been included as a screenshot as per their Terms of Use.
Key Themes

1. Showcasing Canada’s cultural sector
There is a need for more focus on showcasing Canada’s cultural sector through increased support for production of Canadian content as well as sustained efforts on marketing and communication. Doing so will help underscore its value both at home and abroad.

2. Reasserting the role of Canadian creators in the digital age
There is a need to ensure that Canadian creators share in the financial rewards resulting from increased dissemination of cultural content via digital channels. Likewise, there is a need to foster increased re-investments in order to promote the creation of Canadian digital cultural content. Doing so will help ensure the longer term financial viability of Canada’s cultural content creators who may otherwise have to seek out other career paths in order to support themselves.

Some participants were concerned that Canadians are increasingly paying for access and that the lion’s share of the traditional household’s “culture” budget is dedicated to paying for access to the Internet and to the digital platforms that distribute content, leaving little for paying for the content itself. Some felt this model leaves little incentive for idea generation and innovation and threatens the economic viability of the Canadian cultural sector. Others were more optimistic and felt strongly that the new models for distribution have allowed for more direct relationships between creators and consumers, with distribution effectively placed in the hands of content creators and producers.

Participants acknowledged that with traditional media, creating a contained environment to foster Canadian content was simpler, as the majority of broadcasting within Canada was controlled within Canada’s borders and as a scheduled stream rather than access to a menu of content. Here contributors were divided between those who felt that similar regulations should be imposed across the full cultural sector and those who felt that relaxing the regulations in place to allow traditional media to compete with the less regulated digital sector would be more appropriate. In any case, a level playing field for private sector competition was desired, across platforms, production models, content types and different players within the cultural sector value chain.

3. Defining Canadian cultural content and Canadian cultural creators
There was near unanimous agreement that Canada should revisit and update what qualifies as Canadian content and who qualifies as a Canadian creator. They felt that if Canada is to continue to devise policies or legislation to protect and promote these, there must first be a clear definition for these concepts. For some, Canadian content was simply content created by Canadians. For others, the content must be both created by a Canadian and expressed from a uniquely Canadian perspective. How this question is answered carries sig-
significant implications for the debate around support systems in terms of funding and the Canadian brand.

Some felt that too broad a definition threatens the ability of Canada’s cultural identity to sustain itself, much less grow and thrive. Many expressed that a key differentiating factor for Canadian content is the unique voice and some feared without protection this unique perspective may be lost. For these participants, truly Canadian cultural content must be developed by Canadians and must present a uniquely Canadian perspective. Defining it in this way would ensure that all Canadian content would serve to strengthen the Canadian culture and the Canadian brand by showcasing the key brand elements of diversity.

Others felt that Canadian creators bring their unique Canadian voice to any project they work on, that their stories are inherently Canadian regardless of whether it contains squarely Canadian content.

Participants also referenced that technology has led to new classes of creators that leverage digital tools and platforms to create and disseminate their works and these creators may not fit into categories traditionally eligible for support. Moreover, participants also felt that the established definition of the cultural industries should be broadened to include domains such as design and video games.

4. Adapting current funding models to a constantly changing cultural landscape

There is a need for increased funding as well as the creation of funding models that are more adaptable. A level field for private sector competition was desired by participants, across platforms, production models, content types and different players within the cultural sector value chain, particularly within the discussion of new digital platforms (like Netflix, Facebook, Amazon and Spotify).

Doing so would also allow support for cultural projects that are important to the Canadian cultural fabric without necessarily having significant commercial viability (e.g. official languages, cultural diversity, Indigenous peoples). Focusing solely on commercial return on investment can be a limiting factor to encouraging culturally significant creations.

A number of participants from selected industries did suggest that although adapting the current models would be welcomed, any changes should not be at the expense of those programs and policies that have been well regarded such as the current production tax credits and the Canada Media Fund Experimental Stream. There was also a general consensus that any changes to the policy toolkit should include provisions to reduce red tape and simplify application and funding mechanisms.
5. Finding new sources of public funding is required, but where should these funds come from?
There is general recognition that increasing the tax burden on foreign and/or Canadian enterprises to fund creative development is likely to have a direct impact on Canadian consumer. They were worried this would result in limiting affordability and access to high-speed Internet connections. Many options were proposed, such as sales tax on digital services, an ISP tax/levy, contributions to Canadian content by digital platforms, spectrum auction revenue or an increase from government general revenue.

6. Modernizing Canada’s legislative framework and national cultural institutions
Many participants said that Canada’s Broadcasting Act, the Copyright Act and the mandates of the CRTC and the CBC/Radio-Canada have not kept pace with the shifting digital environment and should be examined.

A number of participants suggested a narrowing of the CBC/Radio-Canada’s scope so that these organizations can focus on showcasing Canadian local, regional and national perspectives with particular emphasis on arts and news content. There is general agreement that the CBC/Radio-Canada is well suited to promoting and showcasing Canadian cultural content both domestically and internationally.

The legislative framework must be in keeping with the current cultural landscape. Policies and regulation should reflect a new definition of what is Canadian and what is content to fit with the content and consumption patterns of Canadians today and into the future.

7. Clarifying the role of Canada’s public broadcaster
CBC/Radio-Canada’s funding structure is in need of review. A number of contributors commented that it should not be required to compete with private broadcasters for advertising dollars. The issue of focusing their attention on local news and cultural programming was also brought up.

8. Collaborating to take up the challenges ahead
Much of the needed change discussed involves collaboration between the Department of Canadian Heritage, other government departments, provinces and territories, as well as the public and private sectors. There was broad agreement that Canada should re-evaluate how the cultural sector in Canada is structured and perceived. From a public policy perspective, it was often noted that the cultural sector in Canada is isolated from industrial and economic strategies and infrastructure. In other words, rather than developing policy for the cultural sector in concert with and integrated into Canada’s industrial and economic strategies, some participants felt that the cultural sector is treated as separate from other industries with its own funding mechanisms, objectives and focus. This limits its ability to fully contribute to economic growth and reap the benefits it generates as a catalyst of innovation and a valuable industrial sector.

• Collaboration in funding: While the role of the government in providing funding is seen as essential, it does
not and should not preclude the importance of under-scoring and encouraging private sector investments as well as potentially tapping into other financing channels such as crowdsourcing and micro-financing.

- **Collaboration in access:** Access to digital content often equals access to the Internet. This should be afforded to all Canadians. This requires collaboration across government.
- **Promotion of increased cross-sectorial innovation:** The benefits of the creative sector are felt in other industries and as such, innovation in this area will assist in driving innovation across multiple sectors.

What might this mean?

A number of key issues and next steps drawn from participant feedback are highlighted below. While an effort was made to involve many different sectors and interested parties in the consultation process, the views presented in this document are limited to those of various stakeholders who took part in the consultation process and therefore should not and cannot necessarily be seen as representative of the industry nor Canadians’ views in this area.

In exploring the concepts and issues raised by consultation contributors, the following emerged as salient areas for further exploration and development:

- Through both public policy and perception, reposition the cultural sector as an engine of economic growth and innovation in Canada.
- Develop clear definitions of what qualifies as Canadian content and Canadian creators, as participants were unable to come to a consensus on a definition.
- Further explore regulatory implications and possible regulatory changes, such as changes to Canadian content rules for TV and radio and changes to policy on co-productions and international agreements.
- Revamp intellectual property legislation to ensure that creators are legally entitled to their fair share of the profit generated by their work.
- Enable access to high speed broadband Internet for all Canadians.
- Review public funding programs to allow more flexibility in what is funded and how it is funded to make them more efficient and accessible to a broader range of creators. Allow for funding at different points in the creative process and embrace co-production and hybrid funding models.
- Ensure that funding criteria strike the right balance between profitability and cultural value. Reserve funding for official languages and Indigenous and cultural and linguistic groups that are important to the fabric of Canadian culture and heritage.
- Create, communicate and promote a strong and identifiable brand for the Canadian cultural sector both at home and abroad.
- Review the current legislative framework for cultural policy to bring it in line with the digital environment, including the mandates and make-up of the CRTC and CBC/Radio-Canada. It is important that this encompass both present and future environments.
- Encourage risk and multisector collaboration to spur innovation.
It is important to note that many of the Canadians (both consumers and creators of culture) who participated in this consultation acknowledge both the complexity and importance of this review. Several expressed their appreciation for the Government’s attention to this issue and for involving industry and the public in consultations as part of the process.

The scope of this policy review can appear unmanageable at first. [We] applaud[] the audacity of the undertaking.

Because artists and creators produce valuable content, their rights must be protected, even more so in an evolving digital world. Various countries offer us inspiring examples or could become our partners to protect artists’ rights to fair compensation and control over their work.

As a culture beside a juggernaut like the USA, Canadian talent requires more support rather than less. Why would we want to reduce opportunities for Canadian creators now? We need to foster these voices and sharpen them. Here, Canadian content is important. Supporting our cultural industries is critical to keeping Canada, Canada.

There was a general acknowledgement that the digital age has transformed how cultural content is both created and, perhaps more importantly, consumed, with little regulation or oversight from governments. Many pointed to past shifts, where with the advent of other media, governments have intervened to ensure mechanisms were implemented that ensured a sustainable model for both creators and distributors while balancing the right of citizen choice.
EXISTING OFFICIAL DEFINITION OF CANADIAN CONTENT

When referring to existing rules for Canadian content, most are referring to the Canadian Radio-television and Telecommunications Commission (CRTC) requirements that are derived from the Broadcasting Act. This requires traditional broadcasters to air a defined percentage of content that passes certain criteria to be qualified as Canadian content. This means that individuals from Canada have at least partially written, produced, presented, or otherwise contributed to the creation of the content. More information about What makes it Canadian?

CREATIVE DEVELOPMENT WORKFLOW

For the purposes of this report, creator refers to the idea generator or originator, where the story and essence of the project is defined. From here there are a number of collaborative inputs with other creative players, who help to shape the final product and incorporate their own levels of creativity into the creation process through conversion. Finally, content is diffused or distributed through broadcasters, publishers and other distribution channels.

Examples:
- Artists, writers, composers, screenwriters, songwriters, etc.
- Dancers, actors, musicians, illustrators.
- Universal, Disney, Netflix, Rogers, Quebecor, HarperCollinsPublishers, Spotify, Amazon, iTunes, TVA, CTV, Postmedia

IDEA GENERATION

IN-HOUSE

CROSS-POLLINATION

EXTERNAL

CONVERSION

SELECTION

DEVELOPMENT

DIFFUSION

SPREAD

What does a cultural system that supports creators and respects citizen choice look like to you?

Discussions of this pillar can be broken into two parts: supporting creators and citizen choice. That said, the issues and ideas raised often addressed both aspects of the question. It is clear from the consultation events that Canada cannot support creators, producers and broadcasters without implications for citizen choice and without considering the demands of the public. Conversely, respecting citizen choice cannot be achieved without investing in ensuring that the public is afforded access to a diverse body of cultural content.

Supporting our creators

According to consultation participants, a cultural system that supports creators is one that invests in them, develops them and protects them. It was expressed that investing in Canada’s creative class means ensuring that viable and sustainable funding models are in place to ensure that the creative community has the resources to develop high quality content and distribute it to the public effectively. The Quebec Star system was cited as a model that works well for the French language market within Canada and abroad. Participants also suggested that they need to be provided with the support required to develop their skills and create strong financially viable careers. For this to happen, creators, or those who generate the ideas behind the content, must be able to protect ownership of their work so they may reap the benefits of its success.

Investing in our creators

At the core of the discussion about investing in Canadian creators was the question of funding. Given that the context of this consultation was the role of government, emphasis was placed on public funding models. While many expressed gratitude and praise for the recent increases in funding to the arts sector in Canada, the issue of how funds are distributed was of concern. There was general agreement that Canada’s current public funding model needs to be re-evaluated and transformed to allow broader access, more flexibility and reduced bureaucratic processes and procedures. That said, there were many different views on how to change the current public funding model, such as:

1. Granting funding to a broader class of creators that includes more industries within the sector, and acknowledges the different roles in digital creation.
2. Reviewing funding criteria.
3. Providing more flexible funding channels and uses.
4. Encouraging private sector investment.
5. Acknowledging the balance between cultural value and profitability, each of which are further explored below.

Many creators expressed concern that funding is granted to a restricted group within the cultural sector. While some focused on a concentration of funding in urban centres and the central region of the country, others pointed to a funnel effect whereby public funding was often not granted to creators themselves but rather producers, print houses and other individuals responsible for the distribution of content. Many argued that this tendency developed prior to the digital age when these intermediaries were the sole mechanism for distributing content to the public. With the advent of the Internet, the creator is less dependent on these and can diffuse content directly. Some described this evolution as a collapsing of the value chain of creative production. Many lamented that the funding model had not evolved to reflect this and called for a more streamlined model that mirrors this alternate model for creation, providing more direct access for the creator to public funds. In essence, more funding mechanisms should be in place that allow creators themselves to access funds to develop, produce, distribute and market their content.

Less gatekeepers. More money for creators.
Increase the pot for creators and less for the jury system.

PRINCIPLE #1: FOCUSING ON CITIZENS AND CREATORS

What we heard from Canadian creators, citizens and cultural stakeholders
To a lesser extent, content producers expressed a similar sentiment, that the funding models need to allow for flexibility in and across the value chain as well as differing models for distribution. They argued that investment in production companies and publishers remains important; however, funding should allow for a broader spectrum of activities to be represented within the full project lifecycle.

Beyond broadening the criteria for who can access funds, there was strong support for reviewing the criteria in place for what qualifies for funding. It was often noted that the core current criteria for funding is too restrictive. The question of what qualifies as cultural content alluded to in the introduction is fundamental to this issue. The prevailing view among consultation participants was that, currently, projects are funded according to a narrow definition of cultural content and a set of criteria that limits the diversity of content and voices eligible to receive funding. Some spoke of having to create to meet criteria rather than letting the creative process determine the output, which often forces them...
to compromise their creative integrity in order to gain access to development funds. Some participants working with digital platforms found that there were not any funding mechanisms tailored to their work, making access to funding virtually impossible. For example, one YouTube creator mentioned that they were unable to apply for funding as they did not fit into the fixed release series model required by most funding agencies.

For innovation to flourish in the digital and interactive media spheres, we need a support system that goes beyond funding for new products to one that supports innovative companies in the screen sector. This is why a new innovation fund tailored to supporting the needs and activities of cultural entrepreneurs is both needed and timely...Innovation from independent production companies results in new consumer experiences, new methods of communicating, and stylistically enhanced products. This innovation provides greater value to consumers while supporting the growth and sustainability of the content-producing company.

Stop funding boilerplate family sitcoms that nobody watches, and give funding to creators with weird, unique ideas and visions. That's how you kept Cronenberg in the creative Canadian system; use him as an example.

We need a granting process that encourages new voices and ideas to be expressed. We also need to create more opportunities and platforms for independent creators to showcase their work throughout Canada and internationally.

That said, some cautioned that allowing too much flexibility and broadening definitions too much could threaten the ability to focus public funding on cultural endeavours that truly reflect Canadian culture. Examples include maintaining and, in some cases, expanding, criteria that ensure funding is reserved for official languages and Indigenous projects.

Another aspect of funding that was discussed was the idea of more flexible funding channels. Instead of focusing on offering grants at the outset of a project, many called for opportunities to access funding at different points in the production process. Some suggested that perhaps a project has sufficient resources to launch initial development but will need support at a later stage. For them, this may mean financing for a digital presence, an interim phase of development, marketing, etc. Others suggested more investment in idea generation at the outset of a project to provide income support for creators developing their ideas. One suggestion was a minimum income for the creative sector, similar to models implemented in Europe. Another was support for the creation of makerspaces to support this initial phase in creative development.

This desired flexibility also includes access to funding through loans in addition to grants. Loans stretch public dollars further and, in some cases provide a model of shared risk between the creator and the funder which would help to encourage innovation. This, however, would limit the likelihood of funding ventures with limited economic viability, the benefits and drawbacks of which are further discussed below.

In the past, the single greatest inhibitor of success for Canadian productions has been its inadequate, mixed (private/public) system of funding. If we are serious about the future, we must face this issue up-front and end the futile stop-gap and band-aiding process.

It's not about Can Con, it's not about restrictions, it's about investing in an industry that creates world-class, competitive content. Regardless of the platforms mandated to distribute it.

Public funds should be allocated without discrimination against digital creators. This is a gap that should be addressed if the Government wishes to support all classes of creators and creative entrepreneurs, and to alleviate pressure on Canadian creative entrepreneurs to emigrate [to the United States].

By moving away from the conventional economic circuits by using reading platforms and devices outside of the established and regulated chain, digital technologies continue to shake up the value chain for the creation, production, distribution and acquisition of books.

The balance between profitability and cultural value was a controversial topic that crossed stakeholder groups. Cultural value for some means a prioritization of expression that
is in some way unique or exemplifies a particularly important shift within the greater societal discourse. In visual arts, this may be exemplified by a particular piece that demonstrates the key elements of a movement or that inspired a change in technique among the creator’s peers. For others, the cultural value of content relates to its importance and connection to its audience and the degree to which they are able to connect with the content and be impacted (be it emotionally or intellectually).

A discussion around the social contract between the Government of Canada and Canadians with regard to cultural content focused on the importance of cultural value. Many expressed the feeling that it is the role of the Government to foster a distinct Canadian identity and citizen participation in Canadian society, as well as the role of citizens to participate and engage.

“This reflection raises the question of the allocation of effort. Some stakeholders claim that the culture budget is too heavily focused on the creation of a cultural offering. They should therefore specify what would constitute sufficient local cultural content creation in a context where, to occupy our own cultural space and encourage interaction with citizens in all their diversity, offerings must reach a certain critical mass. Otherwise, the area will be quickly filled with foreign offerings.

However, when it comes down to funding projects, some argue that only projects that can demonstrate a near guarantee of commercial success are currently being supported, leading to a risk-averse mentality among funding agencies. Many argued that there is currently too much emphasis on the financial success of a project in the funding decision. This was for two distinct reasons. First, privileging profit over cultural value is to the detriment of supporting projects that are truly innovative. They argued that, if a project is truly innovative, there must be a possibility of failure. Thus, limiting funding to ‘sure things’ virtually ensures that there is not funding for innovation. Second, too much focus on profitability means that there is a lack of support for endeavours that may offer immense cultural value despite not being profitable.

[…] We can’t forget about our local content and art and cultural product that is finding an audience at home that may not necessarily find an audience abroad; it is also still [a] relevant and important investment.

Our revamped cultural system’s first focus should not be on making money but on making great product. It should inspire creators to experiment, take risks and innovate. It must acknowledge that there is no blueprint for success. Nothing can predict a hit—not the size of budgets, not the nationality of the screenwriters, not demographic research. In Canada as it is everywhere in the world—there will always be more duds than hits. Failure must be expected on the road to success.

Creative success demands the willingness to take creative risks. Many a producer, broadcast executive, studio head, or cultural policy analyst has wondered to themselves how it might be possible to produce, commission, or fund only hits. All of their jobs would no doubt be easier if they were able to invest their time and money only in successful projects, and not to bother with the failures. We can report that screenwriters too wish they could write nothing but successes, every time. Unfortunately, that is simply not possible. Despite the best of intentions—for example, to focus on “quality over quantity”, as if the two were unrelated—we cannot have creative successes without risking creative failures. In short, [Canada] requires a greater appetite for creative risk-taking.

Others felt that profitability and sustainability of a project or business should be a key component in deciding what receives public funding as return on investment was seen
as an important outcome. Some argued that low quality projects are being funded because they qualify as Canadian content based on what they see as an outdated view of what is Canadian. This subjective view of what is culturally valuable is prioritized over the potential benefit to the creative economy.

A lot of granting agencies and some ventures that exist; they are not really factoring [...] the commercial side. [...] it’s part of the form but it’s really secondary to the notion of the Canadian content and cultural and all that kind of stuff. And so we end up funding a lot of mediocrity or a lot of kind of just junk out there. You know we are investors and we invest in video games. And we get hundreds of pitches and we’re really good at saying no. And it’s funny but not funny that one day we say no to a studio because they have no chance and there is no commercial viability. And then, the next day we see an announcement that they received a million dollars from one of the Canadian funding agencies.

While there was no clear consensus on what the right balance is, there was general sense that Canada is not striking it today. Suggestions to address this balance included funding support for a wider range of projects, the use of peer review to evaluate quality, focusing on funding high-potential creators or businesses, revisiting definitions of what should qualify as Canadian content within the existing legislative framework, prioritizing creative sector employment, and engaging the private sector in investing in innovative projects (as opposed to solely profitable ventures) through financial incentives. National cultural institutions (such as the CBC/Radio-Canada, NFB and Telefilm) were also seen as an opportunity to support and promote culturally valuable projects within the broader narrative of the creative space, similar to the current role of the National Film Board (NFB).

Private sector financing was also a subject of debate. For the most part, participants agreed that Canada should encourage, foster and incentivize private sector investment in Canada’s cultural sector. In a nod to the undercurrent that the cultural sector should be viewed as an integral part of Canada’s economic engine, many argued that private sector investment through incentivised financial support, co-creation and cross-pollination would be of great benefit to creators and to the Canadian economy. Many contributors argued that private enterprise often has the infrastructure and tools they need but no impetus to collaborate. Private sector contributors expressed a desire to engage more with creators and producers but admitted they were restricted by the bottom line. They suggested that initiatives for even private organizations to offer creative spaces and access to their resources could only be sustained if they operated, at a minimum, on a cost-recovery basis. Public incentives such as tax credits or subsidies would help to remove this barrier and encourage greater investment on the part of the private sector.

The injection of significant private investment in our sector can be quickly realized through incentives equal to those currently offered to investors in the non-renewable resource sector.

The expressed benefits range from expanding access for those in the sector to the resources they need without relying on public funds to fostering greater innovation through cross-sectoral collaboration. That said, there was near-unanimous agreement that while this approach would be a valuable complement to public funding, it should not be seen as an alternative. Since the private sector is inherently focused on commercial ends, which inevitably has an impact on the creative output, many felt that public sector funding must remain the core of the funding ecosystem to ensure that cultural content is developed that is not influenced by the private sector.

Crowdsourcing was also proposed as a potential funding model. While crowdsourcing is already available as an option, many participants proposed that the government could play a role in encouraging this approach through incentives like tax benefits or matching programs.

**Developing our creators**

Consultation participants also expressed a need for promotion and investment in arts and cultural education. With regard to education within the creative sector, the discussion tended to focus on two key aspects. First, they would like to see more programs that initiate Canadian youth to arts and culture as a career and that provide more opportunities for young people to engage with Canadian cultural content. Many felt that this would help to encourage more young Canadians to consider a career in the arts and would also help to instil a familiarity with and respect for Canadian culture, generating more local demand for it. Second, there was a strong call for offering support, training and education in entrepreneurship and general business skills for cre-
Canadian digital creators are usually small businesses made up of 1-2 people. Most in their early phases are working 2 jobs to allow their businesses to grow. This means they cannot fully commit to their businesses and are hamstrung in their ability to focus and grow their businesses. Those who have been fortunate enough to find success typically still struggle with growth and often one person still works a separate job, or they cannot afford to hire new staff for all of the necessary tasks to take the business to the next level. These businesses are especially in need of support in the small-intermediate stages of success.

Most consultation participants also agreed that educating the public at large on the value and benefits to Canada of its cultural sector would help to foster a broader audience base that demands Canadian content, resulting in a larger and more sustainable market for it. Some suggested raising awareness of the complexity of the creative process. For others, the focus should be on promoting Canadian cultural content through interactive experiences that showcase local talent, bringing the creator into more frequent and meaningful contact with the public at large.

I believe that a strong democracy will be the natural result of a diversified and intelligent artistic offering that will educate all citizens, both children and adults. Being exposed to different art forms stimulates sensitivity, empathy and curiosity, and fosters reflection. Our society would benefit from being immersed in a world that offers all sorts of artistic content. There is no shortage of creators in Canada to participate in this collective awakening. What is missing is exposure to different art forms, especially for children.
Protecting our creators

There was consensus that for the creative sector to flourish, the federal government must ensure it is resourced and develop the creative community. However, for it to be sustainable, many participants felt that Canada must protect the creators’ and producers’ ability to commercialize their ideas/content. Several challenges were brought forward including the question of new players’ contributions to Canadian content, creators’ ownership of their content and the limitations in place through the Broadcasting Act.

There was significant debate across all consultation channels of the role that the cable, telecom and digital distribution platforms, such as Facebook, Google, Apple and Netflix, should play in the creative sector. A prominent theme in the consultations was that those who provide access to content in the digital age are the ones reaping the greatest financial benefit. Both funding and regulatory solutions were discussed and contentiously debated.

In terms of regulation, contributors were divided between those who felt that similar regulations should be imposed across the full cultural sector and those who felt that relaxing the regulations in place to allow traditional media to compete with the less regulated digital sector would be more appropriate. In any case, a level playing field for private sector competition was desired, across platforms, production models, content types and different players within the cultural sector value chain.

A digital strategy should contemplate a focus on identifying and removing existing regulatory barriers that inhibit the ability of licensed broadcasters to experiment, innovate and create content for distribution of new digital platforms. A flexible regulatory approach should be adopted to allow for innovation. The current regime of regulation, forbearance and exemption should be replaced with a more permissive approach. The system cannot wait for regulatory review before trying out new services.

[A] cultural system that respects citizens’ choice means that we have ample opportunity to see/hear/read what our OWN creators have to say, not primarily creators from the U.S. and elsewhere. Regulation is what has led to many Canadian success stories to date.

There was also a strong call for regulations that would either require or encourage these companies to reinvest part of their revenue in Canadian creators. For many, this means a levy or tax in exchange for access to the Canadian market. The funds generated would be used to finance the production of Canadian cultural content, similar to the Canada Media Fund. Others spoke for requiring that royalties be paid to content creators. Some raised issues over the feasibility of this approach given the vast majority are not Canadian entities, though many felt that access to the Canadian market would be a sufficient incentive to comply.

Netflix doesn’t collect and remit sales taxes; Shomi did. Netflix doesn’t pay income tax in Canada; Shomi did. Netflix is alive and well; Shomi folded. Canada must work with the OECD to ensure that the Google, Apple, Facebook, and Amazons of the world play by the same rules as Canadian Content providers. Unless the largest content providers follow these basic rules, there can be no social contract. This is a prerequisite to having a dialogue about contribution to content development with OTTs.

Making OTT distributors responsible to Canadian content regulations, and ‘zero-rating’ would help Canadian producers overcome some of the advantages foreign producers have in the Canadian market.

It would be appropriate to implement a contribution regime for Canadian content for ISP services, similar to that which current applies to BDUs. Like the BDU contribution, the proceeds would be directed to the CMF and/or the CIPFs.

On the other side, some contributors were concerned that this type of requirement to participate in Canadian content creation, be it through taxes or quotas for online content would ultimately limit the accessibility and affordability of Internet access. While not much clarity was given to who these taxes would apply to, be they Internet Service Providers (ISPs) or online content providers (like Netflix), the concern was similar.

Others highlighted that many of these organisations are currently investing in content created in Canada by using Canadian talent and resources in the development
and production of content on their platforms. For instance, in Halifax, participants in the in-person sessions were impressed by the Netflix investment in the series *Anne* based on *Anne of Green Gables* by Lucy Maud Montgomery. While this investment may not feed directly into pooled funds for Canadian content like the CMF, it does have an economic impact for creators.

I can understand why they would think of going down this route as I am very much in favour of the government subsidizing Canadian content to ensure we still have a healthy media market and don’t just lose all our talent to the US. There’s lots of ways of to fund that though, and I don’t think an internet tax is the right idea right now. I don’t think it’s an inherently bad idea, but given how much Robelus [Rogers, Bell, Telus] already gouge us I don’t think it’s really the appropriate route to go. If the government could break their monopoly to get prices down first then I could support it, though at that point you may as well just roll it into income tax given how ubiquitous internet service is.

Netflix and other streaming services now create content rather than just stream it, spending hundreds of millions of dollars annually producing shows in Canada, and creating thousands of Canadian jobs. In British Columbia, Netflix has become one of the top film and television employers in 2016. [While] not opposed to some other form of monetary contribution, we believe it is important to recognize that job creation is a major benefit to the Canadian economy. We would also ask the government to consider whether this contribution is any less valuable than that of a Canadian broadcaster that contributes financially, but which then buys foreign product to broadcast, employing no Canadians. The federal labour tax credit is accessed by virtually all film and television productions. It would provide reliable data for a financial contribution model balancing the economic contribution of Canadian job creation against broadcast fees.

Network providers (including broadcasting distribution undertakings, internet service providers and wireless service providers) play a key role in the fulfillment of Canadian public policy goals. It would undermine the attainment of both cultural and economic policy objectives were any new measures introduced to increase the content support obligations of broadcast distributors, or to apply a Canadian content levy to internet service providers, wireless service providers, or their customers.

The foundation of the problem for most is that certain tenets of current intellectual property (IP) legislation are viewed as outdated and ineffective. Several participants spoke specifically of the mandated five year review of the *Copyright Act* in 2017, saying that this was a vital opportunity for Canada to “stand up for creators.” Most agreed that changes to IP legislation that divert the flow of revenue back to the hands of the idea generators is essential to the future of the cultural ecosystem in Canada. In addition to redirecting the flow of profit generated by cultural content, many also called for measures that ensured that IP could be kept in the hands...
of Canadians. Many said that, all too often, to get access to international markets (particularly the U.S.) they must forfeit their ownership of their IP.

While awaiting major copyright reform that will have to be based on a new balance between private interests (compensation for creation of new works) and public interest (the progress of knowledge, cultural enrichment and enrichment of the public domain), it is possible for authors and editors to immediately grant the public more freedom by using copyright in a different way, as proposed by [...] Creative Commons.

Another related issue is the rules around distribution of copyrighted works that place great financial restrictions on publicly oriented content providers such as libraries and schools.

Existing copyright legislation limits the development of Canadian content by failing to balance the needs of creators and users. Canadian schools have access to fewer and fewer Canadian authors because “fair dealing” allows for copying of copyrighted works. Our stories are not being told as often, and inferior teaching methods are being imported.

The Broadcasting Act was also heavily debated, with emphasis on its relevance in the digital age. Many indicated that it should continue to be enforced and that the Canadian content rules should be maintained. Some suggested that the Act be revisited as it focuses on the traditional linear broadcasting model (i.e. where content is pushed in sequential order rather than chosen from a menu) rather than a broader focus on the production of Canadian content. This broader focus was viewed as encompassing more platforms, forms of access and potential future shifts in the way content is consumed. Contributors tended to agree that at a minimum, the CRTC needs to be revisited or re-imagined in order to address the ongoing challenges of the digital marketplace. They stressed that the CRTC was created for the media and cultural environment of the 1970s and 1980s and in their view, has not kept pace with the shift from the traditional broadcast model to the digital environment. In some discussions, participants suggested that while the CRTC plays an important role, it is up to the government to develop policy and a clear mandate for the CRTC in a digital reality.

COPYRIGHT ACT

The Canadian Copyright Act focuses on the protection of literary, artistic, dramatic and musical creations. It focuses on the rights of the copyright owner, which may be an individual creator or corporate entity. It outlines the rights of the copyright holder in determining how content can be used and distributed. The Copyright Board of Canada establishes the royalties to be paid for the use of copyrighted works for collective-administration societies and supervises agreements between users and licensing bodies.

Some felt that recent efforts to relax the point-based requirements to qualify as truly Canadian content are misplaced; for example, many feel that there should be a 10-point requirement rather than accepting efforts to loosen the requirements.

The CRTC announced they were lowering the CanCon ‘point’ requirements for a production to access the Certified Independent Production Funds. This decision will result in fewer work opportunities for Canadian creative talent as Producers turn to foreign actors to play leading roles in Canadian productions that are benefiting from Canadian funds. This weakens our domestic industry precisely when we need to invest in our creative talent so we can thrive next to the U.S. market.

However, other contributors felt strongly that 10 out of 10 requirements is excessive and, in arguments similar to those of relaxing funding requirements, they argued that some flexibility should be given in order to facilitate co-production and ability to work with industry leaders outside of Canada. Collaboration was seen as an important opportunity given the blurring of geographic ties in the borderless digital environment as well as the increasingly mobile workforce.
In our view, we do need to be more flexible in how we support production of content by Canadians, and therefore should not define “Canadian content” by reference to the CAVCO point system or similar complex measure. Rather, the preferred approach would be the one adopted in digital media tax credits, which define eligible labour simply by reference to Canadian residency. This ensures that public funding only applies to eligible labour performed by Canadian residents (which incentivizes use of Canadian labour) while preserving flexibility.

In a 2015 study [...] Canada was compared with ten other countries [...]. The study examined both national funding programs and the fiscal incentives that support domestic, independently produced feature films and television production. Like Canada, all ten comparator countries provide direct support to film production through national funding programs and six also provide national funding for television production. It becomes apparent very quickly is that it is much more difficult to qualify for national funding in Canada than it is in any of the comparator countries. Seven of the ten countries also used a point system on which to base eligibility. The big difference is in the number of possible points and what those points are based on.

We advocate a focus on audience success as the primary criterion for access to support measures; a reduction in Canadian content “points” required to secure funding from the Canada Media Fund to widen the appeal of programming and drive export opportunities; and changes to funding regimes that would permit increased ownership of content by well-capitalized broadcasters.

**BROADCASTING ACT**

The stated goal of the Canadian Broadcasting Act is to maintain Canada’s cultural fabric, thereby strengthening its economy, political and social structures. It covers three main sections: a broadcasting policy for Canada; the regulatory powers of the CRTC; and the operating procedures and mandate for the CBC/Radio-Canada. It outlines the requirement to maintain Canadian-owned and controlled system of broadcasting that includes rules around the inclusion of Canadian content in programming and production.

**Respecting citizen choice**

Many participants noted that citizen choice is inherent in the digital age and that the role of government in ensuring access to seemingly unlimited digital content options came down to enabling high speed, broadband Internet access to all Canadians. With regard to ensuring Canadians can choose from Canadian content options, the debate was more complex. It was generally accepted by consultation participants that Canada should find new ways to ensure that Canadian content is available and accessible to all.†

**INTERNET ACCESS**

Of surveyed Canadians, 93 percent subscribe to the Internet at home or via mobile device, leaving just 7 percent without access at home; this number however jumps to 30 percent without Internet access among those with a household income of less than $25,000.

*Source: Participation in the Digital Economy, Ipsos, 2016 telephone survey of n=1,250 Canadians*

To recap, a digitally inclusive society is one in which everyone has affordable access to high quality internet services and has sufficient capacity to use digital tools to participate meaningfully in society. A digitally inclusive society is easy to define and imagine, but much more difficult to realize.

Canadian culture shouldn’t be an urban luxury. A great part of Canada does not enjoy the digital access the Minister describes. Rural citizens, including many artists, pay a huge surcharge for limited internet access. Taxing that further will cut even more people out of participating in and contributing to Canadian culture.

†Please note, the consultation occurred from September 13th to November 25th 2016, prior to the CRTC’s December 21st 2016 decision declaring broadband internet a basic telecommunications service.
Contrary to your consultation paper’s claim, digital content cannot be “easily accessed” and “consumed anywhere” within Canada.

Canada’s 700 MHz spectrum, previously used for analogue over-the-air (OTA) television broadcasting, is no longer necessarily associated with the delivery of television in Canada. Such reallocated spectrum now falls outside the purview of the Broadcasting Act and is thus beyond the reach and use of most non-vertically integrated television broadcasters, including CBC/Radio-Canada.

Any federal funding to be put towards Canada’s regulated broadcasting and telecommunications systems must include funding for publicly-owned digital media delivery infrastructure in order to improve citizen access (and not simply to create content). As suggested by Dr. Michael Geist, such funds should come from future spectrum auction revenues (such as the 600 MHz auction).

It is not enough that stories are created by Canadians, they must also be available to Canadians. Too much of the discussion of subsidies to content creation ignored the interests of the taxpayers who are primarily audiences. A condition of subsidies should be that the results are made available to Canadian audiences on the platforms they use and accessible using the brands of technology they own.

For many, the difficulty of controlling search algorithms on platforms like Facebook or Netflix that would put Canadian content first means that Canada must focus on creating content that is competitive in this global digital landscape. They were concerned that unless there is forceful push for a certain percentage of Canadian content to be shown, the cultural industry will need to strive to create higher quality content that will stand out against international competition. They understood that in order for Canadian content to find its way to the front page for Canadians to access, it must be driven by a strong demand.

Achieving this means investing in, supporting and protecting Canada’s creators and also promoting and providing them with the necessary infrastructure to showcase their work.

It may also be beneficial to consider the direction in which other jurisdictions are going. The EU is in the process of revising how it will handle OTT services for their European audiences. The European Commission has proposed a mandatory quota of 20% for European content, and has extended the scope to online platforms: “Member States shall ensure that providers of on-demand audiovisual media services under their jurisdiction secure at least a 20% share of European works in their catalogue and ensure prominence of these works.” The Culture Committee of the European Parliament has proposed to raise this threshold to 30%, which is expected to be ratified in February of 2017. In order to consider a quota model such as this, based on domestic content, the definition of what is Canadian content must be addressed.

For others, Canada should take a more aggressive approach through targeted funding and legislation that ensures there is a platform for uniquely Canadian cultural projects that preserve the various cultural communities in Canada. Contributors suggested this may take the form of a kind of digital gateway to Canadian content that it could control and use to ensure there is healthy Canadian offering both for Canadians and the world. Many felt that this would foster creative development as well as social and political inclusion by promoting participation in a greater Canadian community. This was of particular concern to Official Lan-
guage Minority Communities, such as Francophone creators outside of Quebec, but also among Quebec creators who view their audience as inherently smaller than the Anglophone sector, whose national and international marketability is perceived to be stronger. Similar concerns expressed regarding demand were highlighted for Indigenous people as well as other cultures within Canada’s mosaic where private business may not fully embrace these audiences. They felt Canada should develop a Canadian cultural digital platform to promote access and encourage the creation of content for these communities.

It is impossible to meet the challenge of promoting Canada’s creativity in the digital world without PROTECTING the Canadian Content Creators themselves. Encourage and develop sustainable digital platforms to help Canadian Creatives develop, produce, and broadcast their work. Government funding, tax incentives, broadening our past definitions to embrace the new are ways in which we can meet the challenge of the digital future. There is nothing democratic in half-measures: ENGAGE with the content creators themselves, and don’t initiate industry upheaval until ALL sides have been weighed.

While the existing and future markets for digital content remain the focus of this consultation, many participants highlighted the continued popularity of traditional media. Continued investment in content creation within these industries remains a priority for many participants.

The strength of digital media is the centre of many discussions these days but it is important to remember that traditional media remain the predominant cultural medium at this time. Television, radio and books remain the primary value [generators] for the creators of Canadian stories.

Since the Internet doesn’t finance content, the traditional problems facing Canadian content makers—a small domestic population, proximity to the U.S., etc.—remain as relevant in a digital world as in an analog one. In this sense, “traditional” platforms continue to matter, not so much because they are “essential” distribution platforms—though, for example, traditional television viewing continues to exceed online television viewing in Canada, even if current trends imply that won’t always be the case—but because they are a vital source of production financing.
How can we meet the challenge of promoting Canada’s creativity in the digital world, and how can we use Canadian content to promote a strong democracy?

This question spurred continued dialogue on the importance of supporting the cultural industry in producing high-quality, competitive content that can succeed in the digital world. There was agreement that promoting Canada’s creativity is done, first and foremost, by investing in Canadians in the sector and providing them with the tools to connect with audiences at home and abroad. Many of these issues are closely intertwined with citizen choice and support for creators, which has been explored as part of the discussion of Principle #1. Below, the focus is on the distinct themes that emerged in response to this question.

Promoting Canada’s creativity in the digital world

Across all consultation platforms, there was discussion of the need to promote Canadian content at home and abroad. First and foremost, consultation participants urged for a better definition of Canada’s content offering so that Canadian content is more easily recognizable and to facilitate effective promotion and marketing of the Canadian ‘brand’. For many, the Canadian ‘brand’ should reflect the diversity of both Canada’s cultural and ethnic populations and also Canada’s geography and landscape. There was a strong call to invest in articulating a clear and distinct Canadian brand with all the traditional marketing elements of a brand identity and make it available to creators to promote their work. Many also called for an investment in marketing and promotion efforts both at home and internationally to launch the brand and to generate awareness of it in support of efforts by cultural sector. Some also suggested that funds for marketing and promotion be made available in tandem with these tools to ensure that Canadians at all stages of the creative process have the resources needed to compete in the cultural marketplace and to do so by presenting a consistent brand to the benefit of all. This is tied to the export of Canadian content, which is further discussed under Principle #3, as well as investing in our creators.

"What’s our greatest strength? What do we feel would allow us to cut through with what we have to offer the world? And the answer quite quickly was voice. We have voice. And anyone who lives in Canada knows that means voices. A diversity of voices because of course you need voices. I think anyone who makes television productions or film productions knows that we’ve had our greatest successes when we’ve presented our most unique works to the world. And so uniqueness of voice, the courage to stand behind unique voices, and promote them into an environment of massive choice would be a first great step."

For some, the key to success is promoting Canadian creators in whatever stories they wish to tell. Some felt that by focusing on promoting Canadians, the content will inherently tell their stories, allowing their creations to define Canadian content. While many agreed with this approach, several cautioned that, without specific quotas on content that focuses on specific aspects of Canadian culture (cultural diversity, official languages, Indigenous peoples, etc.) these perspectives may not receive sufficient attention. They called for striking a balance between supporting Canadian creators in developing what inspires them and earmarking resources for what they deemed as uniquely Canadian stories.
Our culture is who we are. It is OUR stories, told TO us, and BY us. The only way to support that culture - and truly respect the needs of Canadians - is to nurture and support the people who create that content, both now and into the future. The choice is simple. We can either support Canada’s creators, and continue to build an industry that produces uniquely Canadian shows that are both commercially and artistically the equal of anything that is produced anywhere else in the world […]. Or we can turn our country into a dumping ground for foreign content, that says nothing about who or what we are, and which lines the pockets of a tiny group of people while bankrupting the cultural heritage of millions of Canadians. This is a pivotal moment in Canadian cultural history. Let’s make the right choice, while we still can.

As referenced in the discussion about of citizen choice earlier in this report, to promote Canada’s creativity, consultation participants frequently suggested that Canada should consider developing a digital gateway to Canadian content. They suggested that this could take the form of a digital platform showcasing all Canadian cultural content that is developed, maintained and promoted by the Government of Canada, another public sector agency or through partnerships with the private sector. This would provide Canadian creators with a platform to disseminate their work, reducing the burden on creators to compete for space on existing American or multi-national platforms. This sentiment was echoed in social media, with discussion regarding the recent failures of Canadian online media, saying that online enterprises (like CraveTV and the now cancelled service Shomi) should have full Canadian support to bring Canadian content into the country of origin. Trying to impose any sort of restriction on what Canadians watch is futile, people will find a way around it. To best support Canadian content, we need to produce and support Canadian projects that aren’t necessarily telling purely Canadian stories. Orphan Black and Corner Gas succeeded not because they told Canadian stories, but because they told stories made by Canadians. We need to produce amazing content, then have that content compete not only Canadian eyes and ears, but international audiences as well. Canadian content rules around radio and TV are irrelevant now, we are migrating away from those technologies.

Consistent support for our creators means nurturing new talent -- fresh voices, with fresh ideas that will resonate with fellow citizens. It also means allowing creators to hone their crafts, develop their skills, and take risks. This is only possible with funding earmarked specifically for Canadian creators -- the writers who establish and protect the creative vision of a project. The more television shows we make, the more experience our creators gain and the greater the chance they will go on to make something truly outstanding. It also means giving creative citizens the choice to live and work in their home country. Without stable funding for Canadian projects (i.e. projects written by Canadians), creators will be forced to move elsewhere.
21st century, and not rely on foreign-based platforms for distribution.

“Thinking about audiences trying to find material in a digital environment. Thinking about the possibility of digital hubs so that audiences can find the content that they might not even now know that they’re looking for.”

Non-intervention by the State is not an option if the government wishes to have Canadian cultural content that reflects our values and creativity and that participates in the diversity of cultural expression present on all platforms and throughout the world. However, this intervention must build on past successes to move forward. The new digital environment should necessitate a certain evolution not a revolution that would discard all the measures that have been taken to allow Canadian culture to flourish.

“I think what is most important is to ensure that we have our own Canadian OTT companies, our own broadcasting company. Be strong and take the OTT plunge because we are better positioned than companies like Netflix to promote Canadian content.”

Many consultation participants raised the issue of search algorithms, which are mostly proprietary computer code used to analyze a corpus of documents based on the keywords entered by a user. These often take user behaviour into account in order to improve results. There was general acknowledgement that search algorithms have a significant impact on how and what content is presented to consumers. It was clear across all platforms that addressing the issue of limited discoverability because of algorithms was paramount to ensuring that Canadian content could compete in the crowded digital marketplace. Many acknowledged that the nature of news aggregator services and digital distribution platforms tailors what is presented and recommended to consumers based on their past preferences and the preferences of other users with similar viewing habits. Participants understood this is often done in order to maximize the time the user spends engaging with the platform in a marketplace where they compete for consumer attention spans; however, it affects the discoverability of content. For many this feature is a positive element as it assists in combating ‘choice fatigue’ by recommending content that is similar to what you have enjoyed in the past. However, some are worried that unless Canadian content becomes preferred and desirable within these systems, that it will remain undiscovered by consumers. One suggestion was to have curated content by respected members of the creative community; however, some suggested this may lead to continued focus on the exclusivity and bias of what is culturally valuable. Another suggestion was that acting as a cultural curator could potentially be a role for the CBC/Radio-Canada.

Provide them with the support and promotion they need to create their content at home. The strongest creators will generate content that stands out and gets noticed in the digital world. The government can let the content speak for itself, and let the audience discover it on [its] own. If we make it, they will come.

For new economic models, the data is more valuable than the product, to the point of restricting the creators’ access to data for the use of their own content (e.g. iTunes).

The analysis and use of personal data from content consumption is one of the main levers of innovation in cultural content.

Promoting a sound democracy

In discussing the role Canadian content plays in contributing to a sound democracy, most of the discussions focused on two key aspects. As an extension of the previous discussion, there was general agreement that a robust Canadian cultural offering contributes to a strong Canadian identity which in turn breeds engaged citizens. Second, there was specific discussion of the importance of local news coverage.
Spotlight on diversity

For more information about the non-representative nature of the analysis, please see our note on interpreting the findings in Appendix A.

Official languages
The issue of ensuring that there is funding for content in both official languages, particularly among French language communities, was raised by many consultation participants across the country. It was the primary focus at the Montréal and Edmonton in-person sessions, however it was also raised in other regions as well. There was concern that, because the market for French language content is smaller both at home and abroad, they cannot compete with English language content in the digital age without government support. They cautioned that, if left to the mercy of the marketplace, French language cultural development may dwindle, to the detriment of Canadian society.

English language minority communities were also discussed, though to a lesser extent during the consultation. However, a number of participants noted lack of support for non-official language communities that have become an important part of the Canadian mosaic.

Indigenous peoples
Representatives from Indigenous communities were in attendance at a number of the in-person sessions. Submissions from Indigenous people were made via the consultation portal as well as via e-mail submission. Many called for guaranteed funding for Indigenous creators to ensure that Canada’s cultural fabric continues to reflect their stories, regardless of whether the projects are commercially viable. Some cited support to Indigenous content and cultural industries as an important element of reconciliation.

Indigenous people are best positioned to represent Indigenous perspectives
There is a stated need to not only support but also promote the production and sharing of Indigenous audio-visual content reflecting a diversity of Indigenous voices—an acknowledgment that the APTN (Aboriginal Peoples Television Network) is uniquely positioned to play an important role in supporting a genuine and meaningful reconciliation between Indigenous peoples and non-Indigenous people through the development of cultural content and platforms intended to promote mutual understanding.

More important role for Indigenous advocates
There was also a call for more active participation of Indigenous candidates in leadership roles (boards or other) within all federally controlled media agencies and organizations and that the administration of Indigenous cultural programs under federal government purview should be centralized under a single department and management structure.

Preservation and promotion of Indigenous cultural contributions for generations to come
Additionally, in the interest of preserving Indigenous cultural content, there was a call for the federal government to establish a digital archive in cooperation with Aboriginal cultural content producers. There was also a view that the CMF should take steps to provide more predictable and adequate funding to Indigenous productions at a level that is commensurate with the size of the Indigenous population. Furthermore, there was a call for the federal government to make federal advertising on Indigenous focused media outlets a priority as they are best suited to reach the intended audience.

A multicultural Canada
Canada’s cultural mosaic has evolved significantly in the last half century and is likely to continue to do so for the foreseeable future[1]. As such, there is a need to revisit and adjust the prism through which Canadian cultural content is viewed and defined in order to ensure that all recognize themselves in Canada’s collective cultural content. Participants expressed that efforts should be made for greater cultural diversity within Canada’s cultural content. Diversity and inclusivity of Canada’s broad spectrum of voices is essential. For some Canada’s culture is the world’s culture, and policies need to reflect the multicultural make-up of the country.

Specific reference was made on several occasions to how showcasing Canada’s diversity through cultural content exposes Canadians to the strengths and value that all of Canada’s communities bring, fostering tolerance and acceptance. Most agreed that diversity and inclusion in terms of region, gender, cultural diversity, the LGBTQ community, Indigenous peoples, and a diversity of opinion are each important to informing Canadians about each other. Several made specific mention of the role cultural content can and does play in reconciliation with Indigenous peoples.

[...] how can we use Canadian content to promote a stronger democracy – [...] democracy is expressed through the diversity of our voices and our stories, and that includes hyper-local stories and stories [...] of more national scope. We want a stronger CBC, that again revives space for biographies, [...] arts and entertainment and some of that [local] programming that we lost.

Some participants were concerned that an increasing pressure to meet citizen demand would lead to less diversity of voices in Canadian news coverage. Through this, participants noted that content is increasingly tailored for the masses and opposing views are often lost in the shuffle to the detriment of Canadian democracy. As discussed, algorithms within the online environment based on consumer preferences are increasingly limiting the ‘discoverability’ of content and exposure to a variety of sources. Some worry that this is putting the consumer into a bubble of like-minded information sources, which may affect their ability to access differing viewpoints on a particular subject. While participants agreed that citizen choice should be respected, it should not dictate news coverage. They agreed that there is a need to report on issues and topics that challenge and inform citizens. Many suggested that the public’s role in sharing very localized information has grown over the last decade and is increasingly becoming a part of traditional journalistic coverage as well as a source of information for other members of the public. While some welcomed this and felt the production of local content by individual creators should be encouraged and perhaps facilitated with the creation of local public networks, others stressed that the expertise and scrutiny of journalists is required for factual delivery of news and should be supported at the local level as well as regionally and nationally.

On achieving diverse and local voices in informational content, two opposing views were expressed. On one side, some felt strongly that the news media, including community radio, television and the CBC/Radio Canada, should be invested in and revamped to play a strong role in reflecting local news stories and that there should be subsidies for local news sources that offer both on and offline content that reflects specific audiences (such as official language minority communities, remote and rural populations, Indigenous communities, etc.) to ensure their survival.

It seems to me that democratic societies and their news industries are facing uncertain futures. I believe a better-informed electorate with easy access to trusted, rigorously fact-checked news will make for a more resilient society. I believe a public broadcaster should have this as its core mandate. I urge you to shift and, if appropriate, narrow the focus of the CBC towards meaningfully strengthening municipal, regional, national and international coverage, with a commitment to ad-free radio, web and podcasts. I see this as essential for a prosperous future for civil society in Canada.

On the other side of the debate, others felt strongly that, while Canada needs to ensure there is a minimum of Canadian news coverage, Canada should allow the market to determine coverage and focus instead of building a strong demand for Canadian content. Some suggested that the advent of citizen focused journalism, through social media and other digital channels, can perhaps supplement the need for local information content, while others expressed concern with the integrity of this approach.

One of the obvious things that local broadcasters and local newspapers and online news providers do is obviously provide local news and information. But again, that is going to require, audiences to go to those platforms for other things as well [...] in order to keep those mediums strong.
Spotlight on Canada’s public broadcaster

There were mixed views on the role of CBC/Radio-Canada as it relates to showcasing Canadian cultural content; however, there was general agreement that CBC/Radio-Canada’s role needed to be clarified. Many felt that it can and should play an important role in terms of showcasing Canadian cultural content both locally, regionally, nationally and internationally. For some, CBC/Radio-Canada’s mandate should focus primarily on local and regional programming with specific references to news, music, arts and youth programming. For these contributors, the public broadcaster has a vital role to play in providing a platform for Canadian cultural offerings which may not otherwise be made available to both the Canadian public and those abroad. There is an expectation that the CBC/Radio-Canada will be sufficiently funded to perform this role. Among Francophone participants, CBC/Radio-Canada was valued for its reach into official language minority communities (OLMCs) and service in both official languages across Canada. Some participants referenced the cuts to these services have reduced their access to French language content outside of Quebec.

Some industry contributors also state that there is a need to revise, clarify and rethink CBC/Radio-Canada’s mandate so that forthwith, it complements rather than competes with Canadian private sector broadcasters. These contributors suggest that CBC/Radio-Canada could be required to offer content that is distinct from that offered by other private sector broadcasters. Furthermore, there is a view among some that CBC/Radio-Canada should also be excluded from the CMF and other independent funds given that it already benefits from substantial public funding.

There is general agreement, regardless of which camp, that the CBC/Radio-Canada should not be competing with private sector broadcasters, specifically for content and advertising revenues.

The business model and cultural policy framework in which CBC/Radio-Canada operates and carries out its public mandate is profoundly and irrevocably broken. Advertising revenues for conventional television are down as audiences become more fragmented, ad-free content becomes more available, and alternate content providers such as YouTube, Netflix, Amazon and Apple TV/iTunes continue to make inroads. In the meantime, the advertising revenue that once helped fund Canadian programs is going to new competitors; large, global technology platforms like Facebook and Google have established a dominant position.

For the artistic talent emerging in our communities, cultural institutions like our community media and Radio-Canada are essential in communicating to our youth, our country and the entire world that we speak, live and create in French from Victoria to Halifax, in places like Whitehorse, Saint-Boniface, Sudbury or Chéticamp.

I like that interviews are not peppered with banal questions, but are thoughtful and penetrating. I like that we get science explained to us without gimmicks.

– CBC is my soundtrack

I like that interviews are not peppered with banal questions, but are thoughtful and penetrating. I like that we get science explained to us without gimmicks.

The CBC is a critical tool in helping Canada in this transitional period as we move into a digital mediasphere. The problem we have is that pre-digital media is not doing the job of covering news -- particularly local news -- that it used to, and this is a function we can’t afford to lose if we want to have a strong democracy. The CBC can play an important role here. Instead of wasting effort on productions that other outlets are happy to cover (sitcoms, dramas, sports, and other popular entertainment), the focus of the CBC should be on informational programming. We should reinvest in more small bureaus across the country, and there should be a focus on hiring journalists to cover local news.

Canadian Association of Film Distributors and Exporters members were thrilled to see [commitment] to increased funding of the Canadian Broadcast Corporation, our national broadcaster and the natural home for high-quality
Canadian content. Unfortunately, the CBC has not, in recent history, aired a significant amount of Canadian cinema. This is not what the public expects of its national broadcaster and it is not conducive to the strengthening Canada’s national identity. CAFDE recommends that the government seek to achieve the desired policy outcomes from this funding by tying it to commitments by the CBC. Specifically, CAFDE proposes that a portion of the new funding granted to the CBC be allocated exclusively to the licensing of Canadian feature films, and that this envelope specifically supports the frequent and regular airing of new theatrical feature films on the CBC.

The Broadcasting Act [provides a] large mandate [for the CBC], to be sure, but the theme that runs throughout it, is that it is Canadian.
How do we support Canada’s artists, content creators and cultural entrepreneurs in order to create a cultural ecosystem in which they thrive and that will benefit the growth of our middle class at home, and help them reach beyond our borders?

Discussions of this principle tended to focus on how culture and creativity play a role in industry and contribute to the economy, and how to promote Canadian content internationally. While it was acknowledged that a thriving cultural sector was good for the economy, which in turn would benefit the middle class, many had difficulty expressing how this would grow the middle class.

A cultural ecosystem that thrives and fuels the growth of the middle class

Across all platforms, three key themes emerged in discussion of the benefits of a thriving cultural economy: a strong focus on encouraging innovation in cultural sector; the need for a cultural export strategy; and the role of culture and creativity in industry. Many called for Canada’s cultural strategy to be aligned and integrated with its industrial and innovation strategies.

There was broad agreement that any new strategy for supporting the cultural sector should focus, at least in part, on spurring innovation. While many suggested that there are currently programs in place that incentivize innovation, such as the CMF experimental stream, their effectiveness has yet to be seen. Several participants noted that most funding mechanisms aimed at supporting innovation require that the project be wholly new. For example, they felt that a creator of a video game that is successful cannot receive funding to produce sequels to create a franchise because their proposal is deemed as a continuation of an existing project and not a new creation. This was particularly important to smaller businesses, which have limited resources for research and development of new projects. According to participants, the same is true for literature, visual arts and the performing arts. Many also said that current mechanisms are not sufficiently flexible to allow for cross-sectoral co-productions between creators of different disciplines, both with public sector entities and with the private sector.

There’s some discussion around dismissing this false binary, [...] between creators and consumers and consumers and citizens, that [...], doesn’t work like that anymore. There is a more complex understanding of the cultural industry, [...] the possibilities in the cultural industry that are enabled by the tech industry- There is not enough of a fusion there yet and the platform could more effectively enable the fruitful cross fertilization between industries that have traditionally been regarded as separate.

There was a sense that if we want to look for innovation, we’d look to the margins, rather than trying to keep it in the center. [...] I think that the idea of really focusing on what has worked, and what could work, we talked about the Aboriginal healing foundation as an organization that did work, and that was unceremoniously kind of shut down after producing lots of innovation and lots of culture.

I beg to say as well that we are really lagging in access to tools and skills across a variety of industries, whether it’s in the innovation industry or whether it’s in the creative industry. And there’s a lot of opportunity for us to create growth in them.

As discussed with respect to funding and knowledge transfer, co-production was also suggested as a driver of innovation. There was near unanimous agreement that the cultural sector plays a pivotal role as an engine of creativity and innovation across multiple disciplines and sectors. The perceived isolation of the cultural sector and different approach to governing from other economic sectors has, according to some contributors, engendered a sense that culture is a luxury rather than acknowledging its value as a powerful piston in Canada’s economic engine. Participants felt that the creative process can benefit other industries from technology to health care and justice. Likewise, it was highlighted...
that innovation in other sectors can serve as a catalyst for innovation in the cultural sector. In addition to calling for incentivizing private sector investment in the context of the discussion around funding, incentivising and/or funding collaborative endeavours between Canadians across different segments of industry was seen as a way to realize the social and economic benefits of cross-sectoral collaboration. To do this, many agreed, the value of cultural creation and development to these sectors needs to be acknowledged and showcased to encourage support for this kind of investment, such as in technologies used in digital content creation.

In some cases, some participants felt that the current climate discourages co-productions across geographies and borders. Working with global experts and creators from other countries was viewed as important to positioning Canada as a cultural leader and in promoting innovative ideas. Participants identified that some consideration should be given to creating circumstances that would allow Canadian creators collaborating with international creators to have access to support even if their cultural product may not be 100% Canadian made.

In addition to a focus on the role of risk and co-production in encouraging innovation, there was extensive debate on the role of the cultural sector within Canadian industry. There was no clear agreement on what the new business model for these industries should be. Many suggested that Canada should treat the cultural sector like any other industrial sector in Canada by affording it the same benefits and supports as the rest of industry. For these participants, this approach would ensure that its economic benefits are recognized and that it is afforded the same attention and investment as traditional industrial segments like manufacturing or technology. Going back to the debate between profitability and cultural value, others cautioned that equating culture to commercial products would risk tipping the balance between commercial viability and cultural value too far in favour of the former to the detriment of Canadian society.

The role of Canada’s national cultural institutions was also raised. Some felt that the interaction between and structure of Canada’s national cultural institutions (such as the CBC/Radio-Canada, NFB and Telefilm) needs to be revisited. For instance, participants noted that while the National Arts Centre (NAC) is a wonderful place to showcase talent, the regional infrastructure is not yet in place to support development to this calibre among many groups, particularly among Indigenous peoples. Others felt that there is too much overlap in certain areas across national cultural institutions (such as the CBC/Radio-Canada, NFB and Telefilm) and gaps in others. They also suggested a model that allows for greater collaboration between the private sector and public sector entities—be they national or provincial/territorial governments, agencies, institutions or other public organisations.

"Collaboration with non-Canadians is often a prerequisite to the successful exportation of Canadian music and its acceptance in international markets. It should be promoted, not discouraged."

The National Arts Center is about to have, for the first time in its 50-year history, an Aboriginal component […] However, historically throughout the country, […] we have no creative spaces for Aboriginal Theatre to exist. So we have a National Arts Centre that is going to be a crown jewel for Aboriginal Theatre, but you have no other places across the country where you can develop, create Aboriginal work to then be presented at the National Arts Centre, we are still sort of homeless in many of our provinces. And so I think there is a need for investment in our cultural infrastructure.

"Reaching beyond our borders"

While there was some debate as to the extent to which Canada is currently an international leader in creative development, most agreed that Canada should continue work to establish as a strong voice in the dialogue on culture and, more specifically, culture in the digital age on the international stage. Many called on the Government to develop a strategy for increasing the visibility of Canadian cultural and creative leaders in international forums on these
subjects. They also called for support in promoting Canadian cultural innovation and leadership globally. Suggestions for this strategy ranged from promotional and marketing efforts under a unified Canadian brand to supporting participation in international cultural fairs and enabling access to global cultural networks. Several participants also indicated that programs encouraging young creators to gain international experience and enabling them to work within a global community of creators would assist in promoting Canadian content globally. The need for cultural trade staff at Canada’s missions in key markets was frequently raised.

**CA** **NADA’S CURRENT INTERNATIONAL OBLIGATIONS**

When thinking about how a modernized cultural policy toolkit might look down the road, Canadians and policymakers must also take into account international obligations as defined by Canada’s treaty responsibilities. The Canadian – European Union: Comprehensive Economic and Trade Agreement (CETA) and the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions are two examples of Canada’s legal responsibilities with respect to the cultural industries.

Many consultation participants discussed the need for a cultural export strategy. Most agreed that Canada has a unique cultural offering that is of interest internationally but that the industry and the government do not do enough to promote and facilitate its export. Several made the case that cultural products/productions should be viewed in the same way as other industrial and commercial products and therefore should receive the same support from governments as well as subject to a pan-Canadian effort across levels of government. That said, some cautioned that grouping cultural exports with other products carries some risk. For them, it is important to ensure that Canadian cultural content that is only relevant in Canada continues to receive support whether or not it would be successful as an export.

And that we can’t forget about our local content and art and cultural product that is finding an audience at home that may not necessarily find an audience abroad is also still relevant and important investment.

The idea of having a cultural identity that is part of our export agenda. And from our perspective, elevating cultural sovereignty, evaluating cultural product and creative industry product, elevating that on the agenda of the national export...elevating the national export agenda would be a key part of enabling us to increase our exports. So getting support from government and from the private sector by you know, recognizing that cultural product is as valuable as anything else we produce in our economy I think is key.
Spotlight on regional themes

It is not possible to draw conclusions about how views differ across the diverse regions of Canada. However, several themes related to regional issues emerged throughout the discussions. For further information on regional in-person events discussions, please visit www.canadiancontentconsultations.ca.

For more information about the non-representative nature of the analysis, please see our note on interpreting the findings in Appendix A.

Rural and remote communities

It was often suggested that there is currently an imbalance in funding between urban centres and more rural and remote parts of Canada. Many called for equity in funding and support across regions. Many also suggested that the lack of access to high-speed broadband Internet in remote and rural areas puts local creators at a disadvantage in terms of access to the tools and technology they need to develop their work and to promote and disseminate it.

Vancouver

A prominent theme in the discussions in Vancouver was the importance of cultural enterprises in the economy as well as the socio-political importance of the industry. It was expressed that Canadian content acts as a means for Canadians to collaborate on a shared vision of the country, that participating in the cultural sphere is a social responsibility as it not only has economic benefits but improves the Canadian experience.

Participants were also concerned that some vulnerable groups have limited access to digital media and the Internet, reducing their ability to participate in this discourse. Most agreed that the strength of Canadian content was in Canadian stories and the diversity of voices within Canada (e.g. Indigenous peoples, cultural diversity, genders, LGBT, etc.). Many viewed a digital hub as fostering a community of creators and citizens sharing content, others felt it put the control of distribution of this content into the hands of a few ‘broadcasters,’ like the current linear models.

Several also suggested looking at the Danish One Vision system, a hands-off, showrunner-based system that encourages a longer incubation and gestation period, with better success – both in the country and in terms of export. There was palpable concern over creators emigrating to the United States due to a lack of support and opportunity in Canada.

Halifax

In Halifax, many suggested that the strength of Canadian content is in the voices and stories of Canadians. The needs of creators and the needs of citizens are different and required different supports. Additionally, participants felt that choice and access to content came down to citizen’s ability to discover new content as well as have readily accessible platforms to reach this content in a digital world. Many viewed a digital hub as incubating a community of creators and citizens sharing content, others felt it put the control of distribution of this content into the hands of a few ‘broadcasters,’ similar to the current linear models. Internet access for all was also a prominent theme.

The role of the CBC/Radio-Canada was stressed, especially in the context of regional representation and local news.

They also focused on the need for training in business and entrepreneurship and on support through services and counselling that would allow creators to build a better and more sustainable ‘business’ with their content. These services would put more of the control in the hands of the creator, making them less dependent on the ‘big names’ or funding institutions.

In-person sessions

The in-person sessions were held across the country in order to enable a wide range of creators, cultural stakeholders and cultural enterprises to participate in industry focused discussions. Across sessions, different themes were given more weight by those participating. While these differences cannot be directly linked to differences in regions across the country, the different focus of these dialogues are important to note, as participants in different cities stressed certain issues. In Vancouver, inclusivity and diversity were fundamental issues, while Edmonton tended to focus more on entrepreneurship and innovation. Participants in Montréal were very keen to speak about copyright issues and creators’ rights, while in Halifax the role of the CBC/Radio-Canada and local/regional support were viewed as crucial.
Toronto
A prominent theme in the discussions in Toronto was the importance of cultural enterprises in the economy as well as the socio-political importance of the industry. They also focused on the need to develop a desire among the public for Canadian content and support efforts to educate citizens on the creative process to foster a greater respect for cultural creation. Toronto participants also highlighted the challenge of the exodus of Canadian creators to the United States where opportunities are more abundant. Another key area of focus in Toronto was local news; some suggested that local journalists should be recognized as creators, and afforded similar supports as discussed for the broader creative community.

The conversation in Toronto touched on developing international experience among young Canadian creators and attracting international talent to Canada but was not a significant focus as in Halifax and Vancouver. However, creators from outside of the traditional spheres were discussed in more detail, as was the experience of young creators in attracting local and international private sector interest in their content. The connection between global export and intellectual property was also not discussed to the same extent in Toronto as in Halifax.

Montréal
In Montréal, participants expressed that a barrier exists for Francophone creators in building an audience with communities outside of Quebec, before exporting to the world. Cultural policy is seen as important to preserving and supporting a strong Francophone identity in Canada and the world. Any changes to the cultural policy toolkit should consider these implications.

The discussion went much further than in other cities to focus on the impact of technology and availability of usage statistics and audience data to drive content creation. While some felt that this benefits commercial creators, many said that a need exists to continue to support the creative process. Creation should not necessarily be treated as a product created based solely on citizen choice.

Internet access and access to content came up in Montréal, as it did in Halifax. Some felt that there needs to be more support in place to improve access among those not connected (rural and low-income audiences).

Participants in Montréal held a unique perspective regarding public access to Canadian content related to archived materials subsidized or funded by past government initiatives, including the archives of the CBC/Radio-Canada. Some felt that this content should be accessible to the public, or at a minimum, students and young people, in an affordable format.

While CBC/Radio Canada were seen as an important part of the system, many stressed the need to engage the private sector as well.

In Montréal, participants discussed the nature of digital content, highlighting that there are two forms of digital content: those created with digital in mind and those created then transformed into digital content. Each presents different challenges in distribution, promotion and innovation. These need to be taken into account in funding and investment and in defining cultural content and creating a sustainable industry for the future.
**Edmonton**
Most participants in Edmonton agreed that supporting creators requires better access to funding and highlighted the parallels between investing in innovative technologies within an industry to develop capacity and investing in the cultural sector. In addition to funding, there was significant discussion on investing in the development of creators. Ensuring that the return on Canada’s investment in cultural content benefits Canadian creators was also seen as essential to long-term success. Several participants suggested that offering spaces for creative entrepreneurs to create would be of benefit to the sector – some referred to these as ‘maker-spaces.’

In the context of digital content, choice is unlimited and inherent in universal access to the Internet. The key is how Canada leverages digital platforms to promote and distribute Canadian content. Choice fatigue was discussed, the unlimited nature of what is available online and amount of content can make it difficult for citizens to make informed choices regarding content consumption.

Official language minority communities in Edmonton also discussed the barrier for Francophone creators in reaching Francophone audiences outside of their immediate communities. They felt support is required to first break into the Quebec market before being able to be successful nationally or internationally.
Canadian digital content, its importance and impact

In addition to responding to the three Consultation questions, the online platform offered Canadians the opportunity to submit their own personal stories discussing the importance of Canadian digital content and its impact. Over 200 stories were submitted through the platform reflecting the views from a broad range of perspectives. From a heartfelt message from a Member of the Order of Canada to a self-published author struggling to stay afloat, these stories add important context to the discussion of the future of Canadian content in a digital world and the impact on Canadians.

An analysis of these stories reveals the vital role culture plays in the lives of Canadians. For many Canadians, culture is important because it not only reflects Canadian society but is instrumental in shaping it.

Many also expressed concern that Canadian society takes cultural content for granted and that there is a lack of respect for what is required to have a healthy cultural ecosystem. Others told stories of how the digital age offers unique opportunities and new avenues to connect with the public, while others still shared stories that highlighted many situations where those who have dedicated their lives to a career in art and culture struggle to make ends meet.

Below is a sample of comments from the personal stories submitted:

This landscape, this geography matters. It matters that people write and create art about it—which is who we are as Canadians, this place.

– Kate Braid, Stories about Our Place

I have explored many avenues to make it pay, using all of my creative ingenuity. But at this late stage of my life, I have to admit, I’m scraping together a living.

– t-ruth, A lifetime of work and still living below the poverty line

...while I appreciate the increase in possibility for proliferation with technology, it is important that funding for live performance and creators of live content still be left in the mix. One way to spread our culture is to ensure there is funding to tour productions to other places ... not just virtually on streaming media, but also in person. Live theatre is essential to the cultural landscape. I utilize technology to promote and market my shows, and on occasion to stream them into remote locations, but nothing can truly replace a live experience.

– Scott White, Creating Live Content In A Digital Age

Canadian content has meant, to me, that we as writers and facilitators, have the opportunity to hold a mirror up to the vast, diverse, changing, compelling world in which we live and work...I have experienced, again and again, the surprised look on the face of Canadian artists, especially emerging artists, who realize, for the first time, that their stories are not only of interest to the general public...they are reflections of the general public. Universality is driven by specificity.

– Judith Rudakoff, Canadian Content
Now with the advent of digital technology, especially affordable High Definition video, poets such as myself are able to branch out, seek new audiences and develop our craft in a way previously unthinkable...At a time when audiences are conditioned to expect more and more visual spectacle, with fewer and fewer people actually reading poetry, video provides a vital bridge that can not only keep poetry alive, but reinvigorate it. I see more and more poetry videos turning up on YouTube and I think we may be on the cusp of reviving the ancient art of poetry in a new and exciting way.

– Sean Arthur Joyce, Crossing Genre Boundaries

The internet has been good to me. It offers me the freedom to create what I want, and gives me direct access to the people who enjoy what I do... It makes me proud every time I can spread the word about Canada’s dedicated arts community whose artists — like me — are working to make a living doing what they love.

– Cathy Thorne, Everyday People Cartoons

Many unpaid hours, no benefits, no holidays, no sick leave. It is a struggle. Why do we do it? We do it because we love what we do and we care.

– Tracy Mclauglin, Secrecy in our Justice System

I learned early on that it’s not just me, much of the world is interested in Canadian life and sees in it the profoundly universal.

– Dorris Heffron, Pioneering Novels
PLEASE NOTE: This element of the report has been put together by PCH staff present at these events, without the involvement of Ipsos.

Summary of Iqaluit Consultation Event

On October 19 2016, the Minister of Canadian Heritage, Melanie Joly and Department of Canadian Heritage Officials conducted a consultation event with members of Nunavut, Northwest Territories and Yukon cultural communities. The event was held at the Frobisher Inn in conjunction with the ALL Arts Summit organized by the Government of Nunavut. The Minister and the Department are grateful to the Government of Nunavut and summit staff for organizing the event and facilitating a space within the consultation to engage with northern artists, creators and cultural organizations.

Ipsos was not responsible for administrating this consultation event and the information presented in this summary is therefore not reflected in the consultation report. The information presented is a compendium of notes taken by PCH staff who were present during these proceedings.

The thoughts, issues, recommendations and points raised during the Iqaluit event include but were not limited to the following:

- Consistent and affordable access to stable high speed Internet for all northern residents was frequently raised and cited as a barrier to access and engagement with fellow Canadians and the wider world. Certain issues that dominate the policy discourse about access, consumption and funding of cultural programs do not resonate in Iqaluit because they are inherently excluded from the conversation.
- Videoconferencing between artists and mentors could make Nunavut feel like a smaller place, more connected. Lack of digital access means citizens of the north cannot fully participate in Canadian culture. Without connectivity, youth are falling behind in fast-moving technologies. Nunavut is not competitive or on par as a result of this.
- Art provides sanity in the north. Need support for connectivity not just for the arts but for all facets of society.
- Social media sites such as Facebook play a key role in connecting northern communities; however, access to the sites is inconsistent due to issues around broadband connectivity. Facebook has taken on the role of community radio. It is used differently in Nunavut than anywhere else.
- The primary communications medium used in the north is radio and it is the main way communities communicate and interact with one another. However, the infrastructure and capacity of northern radio stations is desperately in need of modernization.
- The Northern Native Broadcasting Program needs to be reviewed and restored after having been decimated. TV Nunavut continues to grow and develop and hopes to become a recipient.
- They want to make TV Nunavut available on all plat-
forms but this requires much greater internet speed/capacity.

* Similar to Canadian content regulations, there should be requirements for all broadcasters to carry Indigenous language content. Global, CTV, etc. This could contribute to reconciliation in Canada.

* Investment in technical vocational training such as broadcasting and production as well as digital literacy and coding is required for the region to develop in line with the digital shift.

* Cultural capital infrastructure is also scarce to non-existent, venues such as performing arts centres that may include training opportunities would be a very valuable resource for northern communities. One idea would be to incorporate these initiatives around radio stations as they are already important and central to the communities.

* Inuit and Indigenous northern knowledge is primarily oral, passed on through generations; knowledge keepers now require their knowledge to be documented or risk losing it through attrition.

* A northern arts council whose funding decisions and juries are administered by artists is required to help the growth of the arts community.

* Copyright reform is necessary to help protect/support northern artistic commodities and the artists and creators who live there. However, there are specific challenges around in communities with shared oral culture – who has the ‘right’ to share these stories?

* There is a lot of misinformation in libraries, schools and museum about the Inuit experience. Historical names and other facts are incorrect and this has to be fixed, it’s a question of respect.

* If you build it, we will use it [referring to any technological improvement].

* Arts organizations and governments will need to learn to support art differently in a digital shift.

* Even with such a large percentage of people involved in art in Nunavut, only a tiny fraction of it is seen. It would be so powerful if people could see it. Need to increase access to northern art from outside of the north.
APPENDIX A: CONSULTATION APPROACH

This consultation process took a multi-modal approach to provide different avenues for Canadian creators, cultural stakeholders and citizens to engage in dialogue with the Department of Canadian Heritage and each other on these important issues. This included five distinct feedback mechanisms that allowed contributors to provide feedback publicly to PCH within directed question areas and express more general sentiments regarding the importance and impact of Canadian content.

Interpreting the consultation findings
Due to the nature of public consultations, views presented in this document are those of individuals and organizations who took the time to submit feedback via various channels made available (mail, in-person or online). As such they cannot and should not be considered representative of either the Canadian public in general or the creative community in particular. It is not possible to draw conclusions about how views differ across specific audiences. Rather they represent the views of those engaged in this consultation process. They cannot be extrapolated to a broader audience.

Consultation exercises

In-person roundtables
Six in-person roundtable events were held across the country with industry stakeholders, creators and experts. Ipsos hosted five of these events, with each session including a plenary discussion among the full room as well as
breakout sessions with at-table Ipsos facilitators. This allowed all participants an opportunity to have their voices heard and engage in constructive dialogue on the three core consultation questions.

The Minister of Canadian Heritage was present at each session and participated in introducing each of the consultation topics and providing context as needed. Observers from the EAG and the Department of Canadian Heritage were also on hand to hear feedback directly during the process.

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In addition, PCH hosted a sixth roundtable discussion in Iqaluit, NT, attended by approximately 100 participants representing the cultural sector from Nunavut, Northwest Territories and the Yukon.

* Iqaluit session hosted by PCH not included in metric counts
ONLINE PLATFORM

The online platform was divided into three main streams for input: Share your ideas, Canadian Stories and Got more ideas? Each of these allowed a different level of interaction and input between participants.

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<tr>
<td>Share your ideas</td>
<td>414</td>
</tr>
<tr>
<td>Got more ideas?</td>
<td>252</td>
</tr>
<tr>
<td>Canadian Stories</td>
<td>158</td>
</tr>
<tr>
<td>TOTAL</td>
<td>824</td>
</tr>
</tbody>
</table>

Share your ideas

The Share your ideas tool allowed Canadians to share their ideas regarding how the three core consultation questions could be addressed. Participants had to register and answer some basic demographic questions to share an idea. Participants could then upvote their favourite ideas to further contribute to the ongoing discussion.

<table>
<thead>
<tr>
<th>ENGLISH</th>
<th>397 IDEAS</th>
<th>4117 VOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principle #1</td>
<td>2692</td>
<td></td>
</tr>
<tr>
<td>Principle #2</td>
<td>902</td>
<td></td>
</tr>
<tr>
<td>Principle #3</td>
<td>823</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FRENCH</th>
<th>17 IDEAS</th>
<th>11 VOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principle #1</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Principle #2</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Principle #3</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

Got more ideas?

The “Got more ideas?” option included an open text box, document upload and direct link opportunity for participants to submit anonymous or attributable feedback. This content was more detailed and allowed for long-form and official submissions to be gathered as a part of the consultation process. Participants were also able to link to blogs or articles they had written about the consultation topic or to write a short response to the overall consultation process. A few demographic questions were also included on this form in order to assist in understanding the reach of the consultation process.

<table>
<thead>
<tr>
<th>ENGLISH</th>
<th>207 SUBMISSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRENCH</td>
<td>45 SUBMISSIONS</td>
</tr>
</tbody>
</table>

Canadian stories

The Canadian stories section was an unstructured board allowing Canadians to include a personal story that put the overall consultation in context and a better understanding of why Canadian content is important and its impact. It also allowed registered participants to comment on each other’s stories. Many of the entries in this section were personal memories of Canadian content, many from the perspective of creators.
APPENDIX A: CONSULTATION APPROACH

AUDIENCE

- Consumer: 933
- An academic: 181
- A student: 117
- A creator of cultural content: 657
- A cultural industry stakeholder: 344
- Other industry stakeholder: 111
- A journalist or other member of the media: 94
- None of the above: 150
- Prefer not to disclose: 216

LOCATION

- Abroad: 14
- DK: 11

FACEBOOK LIVE EVENTS

During the in-person events held in Toronto, Montréal and Edmonton, Facebook Live events were streamed to encourage participation from the public in the in-person discussion as well as online. This portion included interviews with key session participants. Comments and feedback received on Facebook during the event were then flowed into the plenary sessions within the in-person discussion. This interactive element assisted in engaging a larger audience during the consultation events and allowed for greater geographic participation.

<table>
<thead>
<tr>
<th>Broadcast</th>
<th>Impressions</th>
<th>Views</th>
<th>Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook Live</td>
<td>97,064</td>
<td>14,307</td>
<td>2082</td>
</tr>
</tbody>
</table>

FACEBOOK LIVE EVENTS
SOCIAL MEDIA DISCUSSIONS THROUGH #DigiCanCon | #verslenumerique

Discussions on social media were promoted throughout the consultation period. This included a special focus on in-person events, with promotional participation from Canadian Heritage social media accounts and engagement in discussion across platforms.

<table>
<thead>
<tr>
<th>SOCIAL MEDIA</th>
<th>Impressions</th>
<th>Engagement</th>
<th>Conversion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter</td>
<td>519,508</td>
<td>2569</td>
<td>992</td>
</tr>
<tr>
<td>Facebook</td>
<td>199,615</td>
<td>2582</td>
<td>685</td>
</tr>
<tr>
<td>Instagram</td>
<td>N/A</td>
<td>446</td>
<td>N/A</td>
</tr>
<tr>
<td>TOTAL</td>
<td>719,123</td>
<td>5597</td>
<td>1677</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HASHTAG</th>
<th>Impressions</th>
<th>Total hashtag use</th>
<th>Unique Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>#DigiCanCon / #verslenumerique</td>
<td>57.1M</td>
<td>11,569</td>
<td>3784</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BROADCAST</th>
<th>Impressions</th>
<th>Views</th>
<th>Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook Live</td>
<td>97,064</td>
<td>14,307</td>
<td>2082</td>
</tr>
<tr>
<td>Instagram Stories</td>
<td>N/A</td>
<td>3,216</td>
<td>N/A</td>
</tr>
<tr>
<td>TOTAL</td>
<td>97,064</td>
<td>17,523</td>
<td>2082</td>
</tr>
</tbody>
</table>

*Impressions: TOTAL amount of people who have been reached with the content
**Engagement: TOTAL Likes + Comments + Shares
***Conversion: TOTAL Clicks to web portal
**Conducting the analysis**

In order to analyse the results of the consultation, all online and in-person contributions were reviewed in detail in order to determine the most common themes that emerged. Equal weight was accorded to all streams of evidence and a thematic analysis was developed. Specific recommendations and rationales that were commonly noted were included in the overall report and each theme was supported using direct quotations from the various consultation streams where appropriate.

This report is a collaborative effort by all team members involved in this project. Each facilitator and analyst on the team has provided summaries addressing major themes from across various sources and contributed to the development of the final major themes and discussion in the report. Ipsos has combined the expertise and knowledge of each public consultation specialist as well as what they heard across the various events and consultation streams. The Ipsos team began the analysis of the input as received while the consultation exercises were still in progress. Once the consultation was closed, Ipsos brought the team together to review the results and discuss strategic implications.

Public consultations and engagements provide an opportunity to garner unstructured feedback from contributors and key stakeholders on a wide range of issues in multiple formats and channels. Multiple forms of analysis were used across exercises, as appropriate, to understand the input received.
For the exercises on the online platform, other submissions and the in-person events, the Ipsos team created thematic content summaries that identified key themes from the different exercises within the study. They were grouped together to get a picture of that theme from the different perspectives represented in the overall discussion of the public issue. These processes were performed manually by the project team, reviewing over 1287 submissions and 2500 pages of feedback. Due to the nature of many of the submissions (not text searchable) and the relatively manageable number of submissions, text analytics were not employed to further aggregate the data.

There is a risk that unstructured and/or non-directed feedback/comments will contain irrelevant information to the process at hand. Manual coding of unstructured feedback allows for tagging irrelevant mentions and understanding/filtering out key words relating to these topics (for instance CBS is an American TV network as well as Canada’s national blood donation regulator).

Note on social media analytics
Ipsos uses a combined approach to social media listening, leveraging a range of tools to collect and analyze online content. As each software application has its strengths and weaknesses, a combined approach that incorporates a manual qualitative analysis of the search results with analytics assists in establishing key themes and discussions throughout the different sources.

The results of social media analysis are not scientific as the population being studied is undefined, given the Internet is a broad platform. The searches have been constructed to focus on discussions of Canadian Content in a Digital World based on observations from manual coding and other feedback during the public consultation process. In the discussion above Ipsos has referenced the sources of the insights provided, which are further detailed below for transparency. It is important to note that all insights derived from these sources are directional in nature.

Sysomos MAP #DigiCanCon and #verslenumerique bilingual Boolean search
Sources: Blogs, Forums, Twitter, News
Date ranges used: Public Consultation Period – September 13 to November 25 2016
Filters used: Location: Canada
Search terms: (#DigiCanCon OR #verslenumerique OR #verlenumerique OR “Canadian content” OR Cancon) AND NOT (from:EU_CanCon OR Cancer)
Total Mentions Captured: 12,530

IBM Watson for social media analytics bilingual keyword base search
Sources: BoardReader (Blogs, Boards, Facebook, News, Reviews) and Twitter
Date ranges used: Public Consultation Period – September 13 to November 25 2016
Filters used: Location: Canada
Topic: Must include AT LEAST ONE OF
General Topic: Canadian Content OR contenu canadien OR CanCon
Hashtags: #verslenumerique OR #DigiCanCon OR #verlenumerique
Total Documents Captured: 4,327
APPENDIX B: CORE CONSULTATION QUESTIONS

1. What does a cultural system that supports creators and respects citizen choice look like to you?
2. How can we meet the challenge of promoting Canada’s creativity in the digital world, and how can we use content to promote a strong democracy?
3. How do we support Canada’s artists, content creators and cultural entrepreneurs in order to create a cultural ecosystem in which they thrive and that will benefit the growth of our middle class at home, and help them reach beyond our borders?
APPENDIX C: FEDERAL CULTURAL POLICY TOOLKIT

LEGISLATIVE FRAMEWORK

- Broadcasting Act
- Copyright Act
- Income Tax Act
- Foreign Publishers Advertising Services Act
- Investment Canada Act
- Telecommunications Act
- Radiocommunication Act
- CRTC Act

NATIONAL INSTITUTIONS

- CBC/Radio-Canada
- National Film Board
- Canada Council for the Arts
- Telefilm Canada
- National Arts Centre
- Library and Archives Canada
- CRTC
- National museums

FINANCIAL SUPPORT

- Canada Book Fund
- Canada Periodical Fund
- Canada Music Fund
- Canada Media Fund
- Canadian Film or Video Production Tax Credit
- Film or Video Production Services Tax Credit
- Export promotion funding
- TV5 funding

POLICIES & REGULATIONS

- Foreign Investment Policy in Book Publishing and Distribution
- Foreign Investment Policy in the Periodical Publishing Sector
- Foreign Investment Policy in Film Distribution
- Policy on Audiovisual Treaty Coproduction
- Canadian content rules for TV and radio
- International agreements

Source: Ipsos
APPENDIX D: PILLARS OF THE APPROACH

Principle #1: Focusing on citizens and creators

Pillar 1.1: Enabling choice and access to content
How can we reflect the expectations of citizens and enable Canadians to choose the content they want to see, hear and experience?

Pillar 1.2: Supporting our creators
How can we fairly support creators in the creation and production of content that stands out? What partnerships will be needed to achieve this? How can we help creators have successful and viable careers in a digital world?

Principle #2: Reflecting Canadian identities and promoting sound democracy

Pillar 2.1: Redefine Canadian content for contemporary Canada
With so much online content available today and given Canada's diverse and multicultural makeup, does the concept of “Canadian content” resonate with you? What does “Canadian” mean to you? Do we need to be more flexible in how we support the production of content by Canadians?

In an ultra-competitive, global market, how can the private sector support the production of content made by Canadians? What is the role of Canada's national cultural institutions, such as CBC/Radio-Canada and the National Film Board?

Pillar 2.2: Strengthen the availability of quality information and news in local markets
What models can we build to support the creation of and access to local information and news in a global context?

Principle #3: Catalyzing economic and social innovation

Pillar 3.1: Positioning Canada as a culture and digital content leader
Canadians make great content; how can we build our exceptional cultural industries and support the growth of new creative enterprises as part of Canada’s innovation agenda? What tools do the government and the private sector already have at their disposal? What new tools could we consider?

How do we incent more risk-taking from creators and cultural entrepreneurs?

Pillar 3.2: Leveraging Canada’s national cultural institutions
How do we ensure that our national cultural institutions, such as the CBC/Radio-Canada and the National Film Board, are a source of creativity and ingenuity for the creative sector more broadly?

Pillar 3.3: Promoting Canadian content globally
What is needed to best equip Canadian creators and cultural industries to thrive in a global market and exploit the country’s competitive advantages? In a global market, what conditions need to be in place to encourage foreign investment in Canada's cultural industries? How can we better brand Canadian content internationally?
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