



ENVIROSCAN 2022

CBC  Radio-Canada

Introduction

In a time of uncertainty and change, CBC/Radio-Canada is more important than ever.

Audiences are engaging with media in a multitude of ways and maintaining high levels of interest and demand for audio and audiovisual services in Canada. Younger Canadians are embracing mobile platforms, streaming services and other digital platforms. Overall, audiences continue to move to digital services.

Over the past few years, CBC/Radio-Canada has implemented an ambitious strategy: transforming itself from a pure linear broadcaster to an integrated digital and mobile content provider. In June, the CRTC recognized, for the first time ever, the significant contribution of our digital streaming services — CBC Gem and ICI TOU.TV, CBC Listen and Radio-Canada OHdio — to the Canadian regulated system. And while we have no intention of abandoning linear services, we cannot ignore the reality that a growing number of Canadians are now only consuming content on digital platforms. These audiences are the future.

CBC/Radio-Canada is here to serve all Canadians in every region of the country, in English and French, and in other languages both at home and abroad. In the programs we offer — be it music, dramas, amateur sporting events, or children's programs — we continue to showcase the richness and diversity of this country and ensure the perspectives and experiences of different groups are shared with everyone. And we continue to provide Canadians with trusted news and information about their community, their country and the world.

But this trust relationship is under pressure. We believe that trusted sources of news and information for Canadians are vital to democracy. It is generally recognized that trust in mainstream media fosters common agreements on facts and a shared understanding of reality, and that such conditions are essential for democracies to function well.

In Canada, diversity and inclusion have become a focal point of social justice, demanding changes across the media industry. We are at the forefront of this change, as we continue our work to improve the reflection and representation of equity-deserving groups: Indigenous Peoples, racialized people, persons with disabilities and members of the LGBTQ2+ communities. Our Equity, Diversity and Inclusion (EDI) plan has targets to spur real action. It is a commitment to ensuring everyone has the same access to opportunities at CBC/Radio-Canada.

CBC/Radio-Canada's mentoring and training programs actively seek out, encourage and prepare employees. We are committed to creating and maintaining a workforce that reflects Canada. And we know the best way to attract and retain top talent is to create a culture and environment that appeals to them.

True to our public service mandate, we strive to appeal to all Canadians, from all walks of life, in all parts of the country and across all generations. Every day, we reach our audiences on the platforms they use, to fulfil our mission of providing a wide variety of content that informs, enlightens and entertains.



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A Portrait of Canada

Population Growth

Canada is now home to 38 million people, 1.8 million more than in the 2016 national census.

Canada remains the fastest-growing country in the G7, with growth at almost twice the pace of other G7 countries from 2016 to 2021.

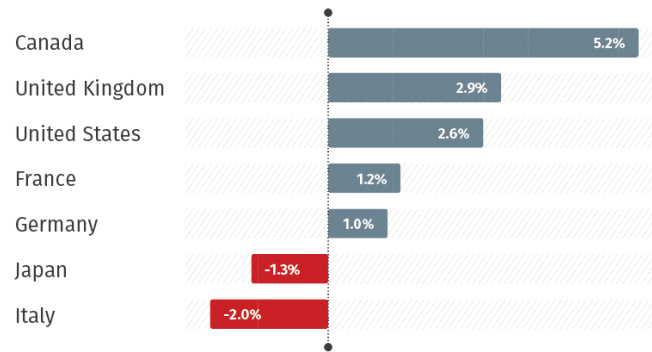
Of the 1.8 million or 5.2% growth in population, four in five are people that arrived here from other countries.

According to Statistics Canada population projection scenarios, the Canadian population will continue to increase over the next decades to between 44.9 million (low growth) and 74.0 million (high growth) by 2068.

Under all scenarios, migratory increases are the main driver of population growth, continuing a pattern that began many years ago.

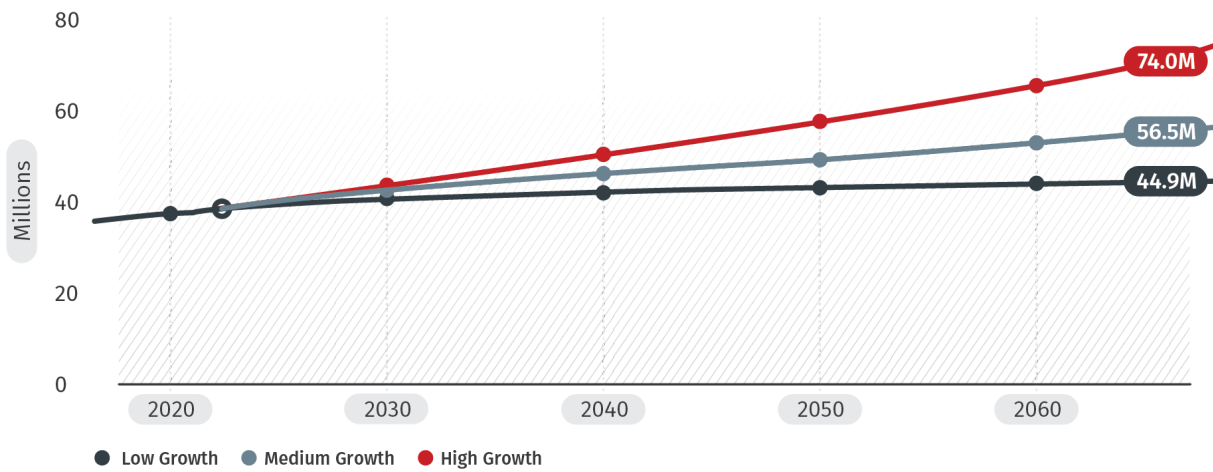
Population Growth in the G7¹

2016 to 2021 | %



Population Projections to 2068²

According to Low, Medium and High Growth scenarios | in millions



¹ Source: Statistics Canada, [Population Projections for Canada, Provinces and Territories, 2021 to 2068](#), 2022.

² Source: *ibid.*

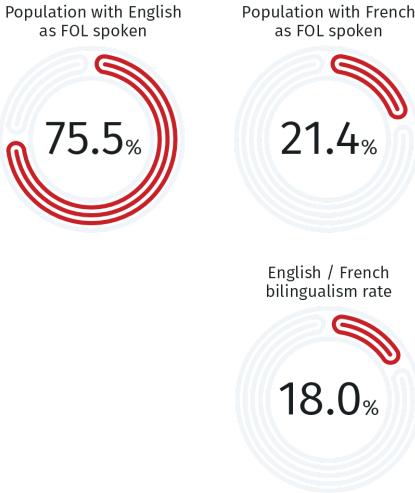
Linguistic Diversity

Canada has a rich linguistic diversity. English and French remain by far the most commonly spoken languages in Canada. More than nine in 10 Canadians speak one of the two official languages at home regularly. And 18% of Canadians can speak both official languages.

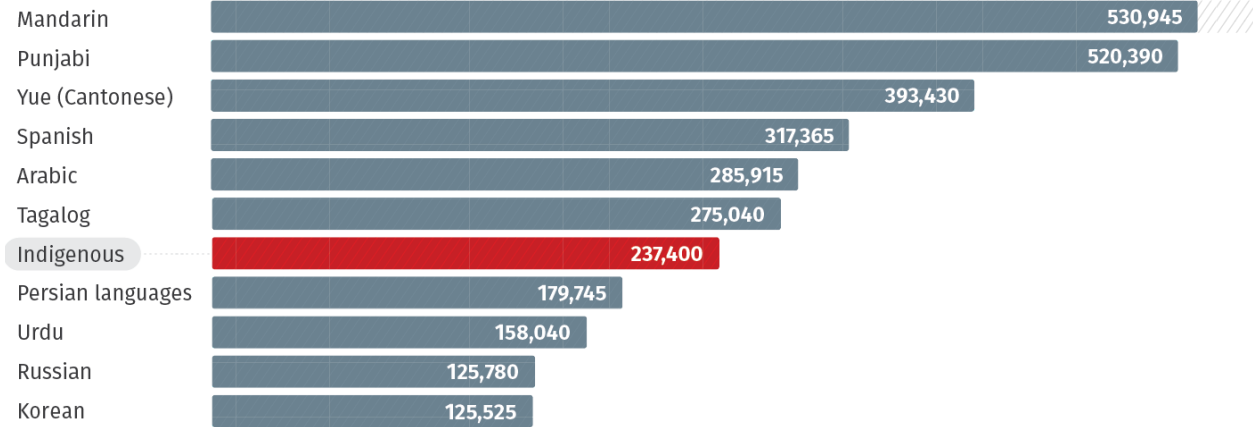
In addition, one in four Canadians in 2021 — or nine million people — spoke a first language other than English or French. Mandarin and Punjabi are the country's most widely spoken non-official languages. More than half a million Canadians spoke one of these languages predominantly.

The 2021 Census reports 237,400 Indigenous Peoples can speak an Indigenous language well enough to conduct a conversation.³ While the number of people whose first language is an Indigenous language has declined, there has been growth in the number of Indigenous second-language speakers. Cree languages and Inuktitut are the main Indigenous languages spoken in Canada. The Inuit language of Inuktitut, which includes Inuktitut, Inuinnaqtun and Inuvialuktun, has official language status in Nunavut and the Northwest Territories.

Understanding Canada's linguistic demography is essential to developing and improving programs and services to reach all Canadians.



Other Languages Spoken in Canada⁴



³ Source: Statistics Canada, [Indigenous population continues to grow and is much younger than the non-Indigenous population, although the pace of growth has slowed](#), September 21, 2022.

⁴ Source: Statistics Canada, [While English and French are still the main languages spoken in Canada, the country's linguistic diversity continues to grow](#), August 17, 2022.



Equity-Deserving Groups

Equity-deserving groups are communities that face challenges in society. This marginalization is created by attitudinal, historic, social and environmental barriers. These equity-deserving groups represent a significant share of the Canadian population.

Racialized Canadians represent 26.5% of the Canadian population⁵, with significant representation of South Asians, Chinese, Black, Filipino and Arabs.

Immigrants also make up a large portion of the Canadian population. International migration has been Canada's main source of population growth for decades. Immigrants are far more likely to settle in an urban area than a rural setting, with more than nine in 10 new immigrants settling in a Census metropolitan area.

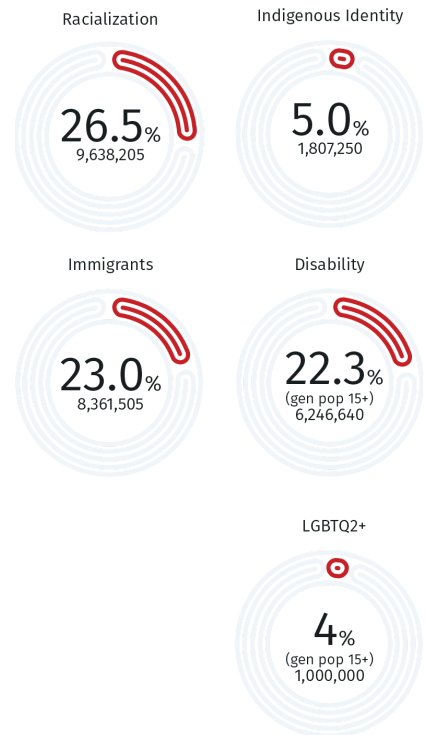
The Indigenous population is now 1.8 million, representing about five per cent of the population.⁶ The term "Indigenous Peoples" refers to three groups — First Nations, Métis and Inuit. Living in Canada, there are:

- 1,048,405 First Nations people
- 624,220 Métis
- 70,545 Inuit

The Indigenous population averages 8.2 years younger than the non-Indigenous population overall.

22.3% of Canadians aged 15 and older report a disability which impacts their daily lives.⁷ And four per cent of Canadians 15 years and older are part of LGBTQ2+ communities.⁸

Canada's diverse population will drive the media industry to increase representation to reflect the changing landscape of our country. It is vital that content and programming is relevant to all Canadians and especially to new Canadians.



⁵ Source: Statistics Canada, [Census Profile](#), 2021 Census of Population.

⁶ Source: Statistics Canada, [Statistics on Indigenous peoples](#), October 3, 2022.

⁷ Source: The [Canadian Survey of Disabilities \(CDS\)](#) reports on disabilities (whether it be physical, sensory, cognitive, or mental health-related) for Canadians 15+, November 28, 2018.

⁸ Source: Statistics Canada, [LGBTQ2+ communities in Canada: A demographic snapshot](#), August 5, 2021.



Audio Market

Traditional Radio

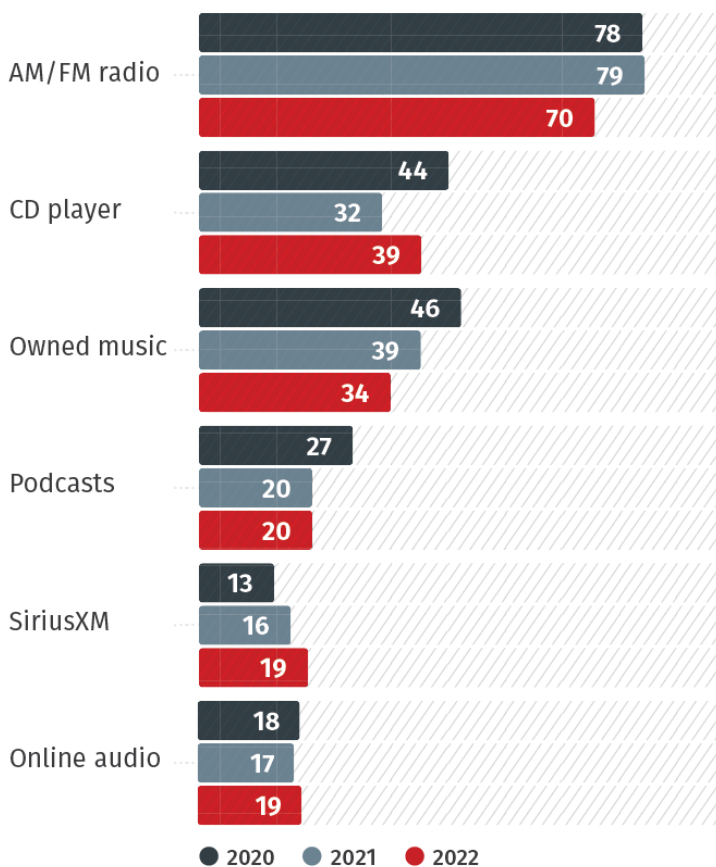
At the beginning of the pandemic, radio tuning levels fell as many Canadians switched to working from home and weren't listening to the radio in the car during the traditional daily commute. Fortunately, recent audio trends have indicated a positive turnaround, especially for the in-car listening market.

AM/FM radio is still used by most Canadians as an audio source in-car. Seventy per cent of Canadians 18+ who have driven or ridden in a car in the last month have used AM/FM radio in-car, down from 79% in 2021.

Audio Sources Used in Car⁹

Base: Canadians 18+ and has driven/ridden in car in the last month: 84%

Audio source used



⁹ Source: Edison Research, [The Infinite Dial Canada](#), 2022.

Online Audio

Canadians have access to a near limitless amount of online audio content. Music streaming services offer free and paid subscriptions while other sources such as YouTube, AM/FM radio streams and podcasts are widely available and accessible on many platforms. Canadians are embracing these offerings.

How Canadians access online audio content¹⁰

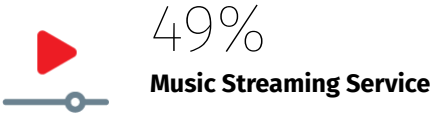
Past Month Users



Although YouTube is primarily a video sharing website with millions of videos available, there is also a wide range of free audio content available. YouTube also offers content through a dedicated music streaming service called YouTube Music.



With most AM/FM radio stations available online, local, regional and even global radio content is available.



These services allow users to listen to content through pre-existing playlists, or craft their own playlists from a larger catalogue of songs. Many offer free versions with ads, or with a paid subscription.



A series of recorded audio files, with instalments released on a regular basis, to be downloaded or streamed through websites, music streaming services, or apps on smartphones, tablets and Internet-connected TV sets.






¹⁰ Source: MTM-OTM, Canadians 18+, Spring 2022.

Podcasting

The advantage of the podcasting format is that it offers a variety of programming across many genres. Any topic a person may be interested in can usually be found online in podcast format.

With close to 20 exclusive podcast series, plus versions of shows broadcast on our radio stations also being made available in podcast form, CBC/Radio-Canada is the biggest publisher in Canada's podcast industry.

Canada Podcast Ranker - Top Podcasts, September 2022¹¹

#	Podcast	Network
1	Dateline NBC	NBC Universal News Group
2	 Front Burner	CBC/Radio-Canada
3	Crime Junkie	audiochuck
4	SmartLess	Wondery Network
5	Morbid	Wondery Network
6	My Favorite Murder with Karen Kilgariff and Georgia Hardstark	Wondery Network
7	Conan O'Brien Needs A Friend	SXM Media
8	 The Current	CBC/Radio-Canada
9	On Purpose with Jay Shetty	SXM Media
10	 Ideas	CBC/Radio-Canada
11	 CBC News: World Report	CBC/Radio-Canada
12	 CBC News: The World This Hour	CBC/Radio-Canada
13	Sexe Oral	TPX Podcast Network
14	Last Podcast on the Left	SXM Media
15	The Mindset Mentor	Kast Media

¹¹ Source: Triton, [Top 15 Canadian Podcasts](#), September 2022.



Audiovisual Market

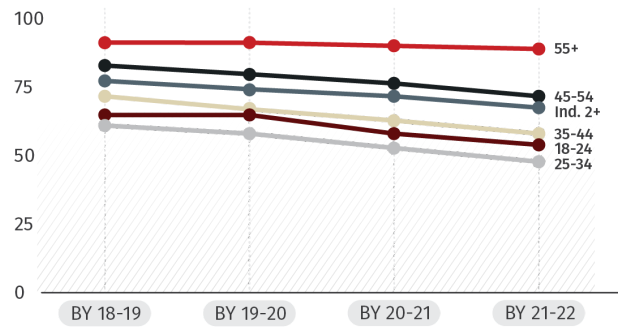
Traditional TV

Daily reach of traditional television continues to decline across all age groups as the flow of audiences to digital continues.

While there has been an overall decline in traditional TV viewing, about half of these audiences are still attracted to scripted content—drama, comedy and entertainment programming—on traditional platforms.

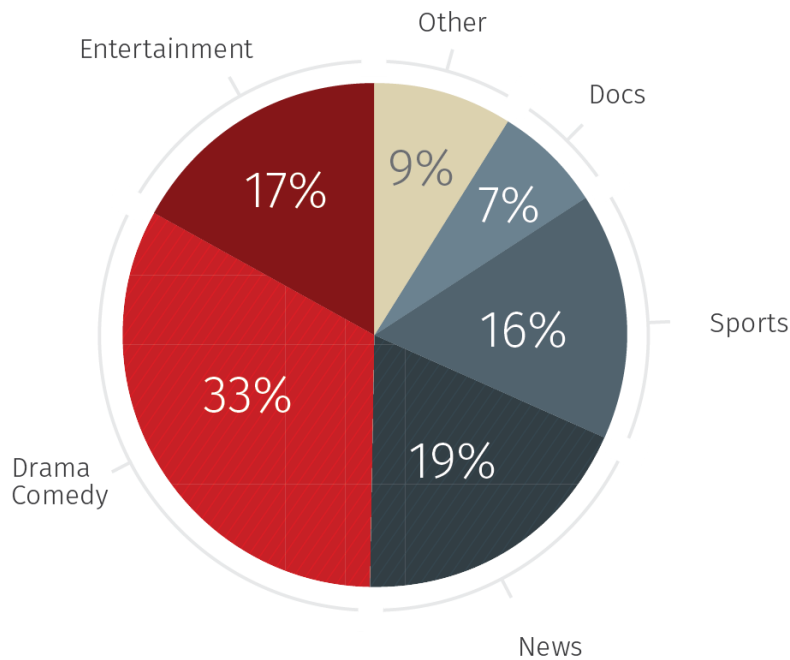
Daily Reach of Television

Broadcast Year and Age Group¹²



Proportion of Time Spent Watching TV

By Genre¹³



¹² Source: Numeris TV PPM, Total Canada, 2+, Monday-Sunday, 2AM-2AM, Daily Reach %, BY 2018-19 to BY 2021-22.

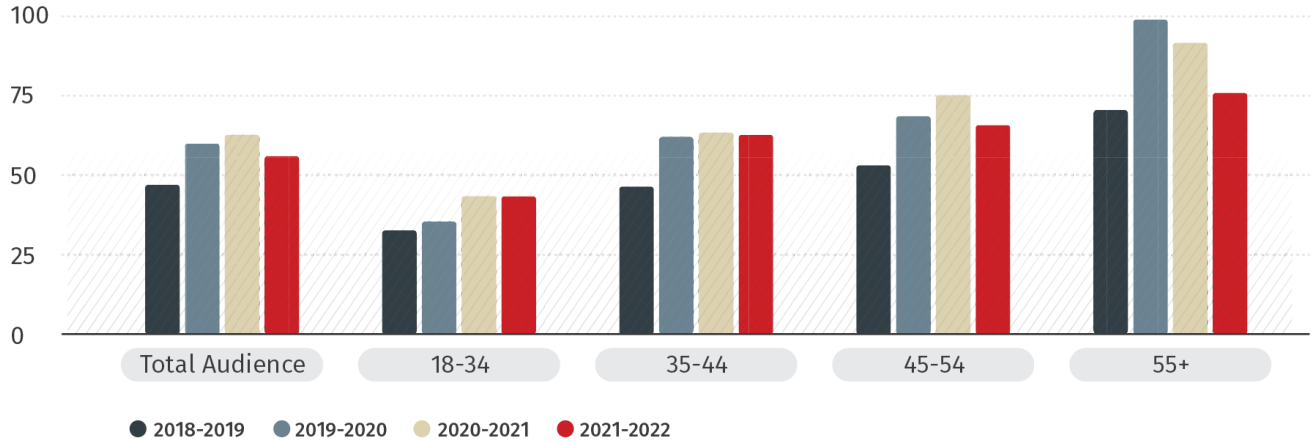
¹³ Source: Numeris TV PPM, Total Canada, 2+, Monday-Sunday, 2AM-2AM, Total Minutes (000), BY 2021-22 (August 30, 2021-July 31, 2022).

Digital News Consumption

Young audiences see news differently. They still need and want news to connect to the world, and fulfil an array of different social and personal needs, but they don't necessarily see traditional media as their main news source. They seek out news resources that address those needs – those services that can improve their understanding and can also offer interesting and fun to know information. Based on Comscore data, we are seeing stability in the younger audiences' usage of news and news-related digital sites. At the other end of the spectrum we may be seeing fatigue, as there is a decline in older Canadians' usage of digital news sites.

Engagement with Digital News¹⁴

Hours/Visitors by Age Group | %



SVOD, AVOD, BVOD... OMG!

After decades as the most popular and lucrative audiovisual medium, traditional TV is in decline as consumers move to streaming services. And while digital video continued its ascent, so too have the number of terms and acronyms used to describe its various iterations, such as OTT, SVOD, AVOD, TVOD, BVOD and FAST.

Each of these streaming services offer similar but unique viewing experiences.

- **SVOD** (Subscription Video-On-Demand) are paid subscription on-demand services, such as Netflix and Disney+, which offer advertising-free content to audiences.
- **AVOD** (Advertising Video-On-Demand) is advertising sponsored content available from stand-alone offerings like YouTube, and allows the audience to access audiovisual content for free, in exchange for viewing advertisements.
- **TVOD** are when consumers purchase on a pay-per-view basis. These types of offerings exist with Apple iTunes or Amazon's video store.

¹⁴ Source: Comscore Media Metrix® Multi-Platform Canada, Total Audience (desktop 2+, mobile 18+), 18-34, 35-44, 45-54, 55+, Annual time spent per Unique Visitor, News/Information category, Broadcast years 18-19, 19-20, 20-21, 21-22 (i.e., Broadcast year = September-August).



- **BVOD** (Broadcaster Video-On-Demand) services refers to video content produced and published by traditional broadcasters that's available online and on-demand, usually with advertisements.
- **FAST** (free ad-supported TV) hosts linear channels that deliver scheduled programming to a mass audience through connected devices.
- And of course, **OTT** (over-the-top). This is the original definition of all these services. The notion was that audiovisual content was being offered outside the traditional business model of viewing on a television set.

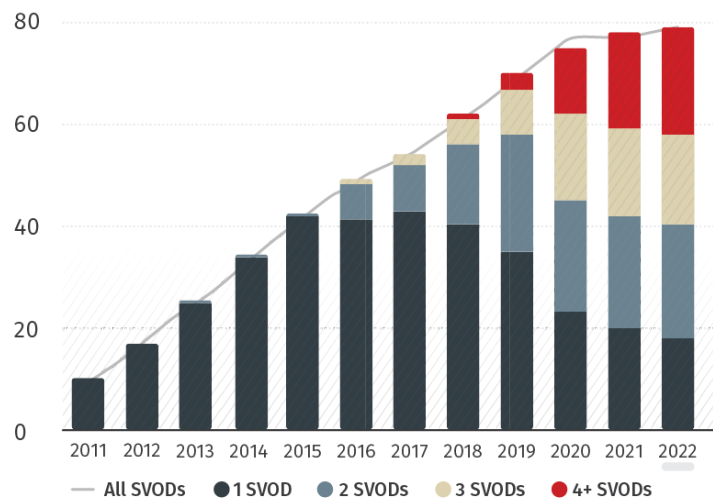
And with the introduction of new services by current players and new entrants into the market, the line between streaming services and AVOD is blurring. Netflix and Disney+ are introducing advertising-based offerings (AVOD) beyond their existing SVOD offering.

It may be that in these inflationary times, consumers are likely to be more cost sensitive and they will expect more choice and flexibility. That is likely one reason why the SVOD giants are building their ad-supported options. People can either pay to access content or watch ads, and with so many competing platforms audiences can take a pick-and-choose approach, paying for favoured platforms while opting to watch ads for others.

Almost eight in 10 households subscribe to a SVOD service. SVOD subscribers have been growing consistently since the introduction of Netflix in the Canadian market, yet overall market growth has recently tapered.

A recent release from the MTM finds that a significant number of SVOD households (45%) are now sharing their account with another household (up from 39% in Spring 2020).

Total SVOD Subscribers¹⁵
Numbers of Subscriptions | %



¹⁵ Source: MTM-OTM, Canadians 18+, 2011-22.

Canadian Viewing Profiles

Now that we see the different types of offerings in the market, industry players need to understand how different audiences connect with media content and interact with available services. Created based on MTM self-reported TV/video viewing data, these viewing profiles¹⁶ describe each of the segments based on their size, their viewing habits, their subscription to various services and their use of both audio and audiovisual content.

Traditionals 16%	Testers 20%	Hybrids 15%	Have it Alls 19%	Online First 28%
<p>90% or more of their viewing time is spent with traditional platforms</p>	<p>60% to 90% of their viewing time is spent with traditional platforms</p>	<p>Their viewing time is evenly split (40% to 60%) between traditional and new platforms</p>	<p>60% to 90% of their viewing time is spent with online platforms and SVOD services</p>	<p>90% or more of their viewing time is spent with online platforms and SVOD services</p>
<p>These viewers mainly watch TV and video content on a TV set through a paid TV subscription service (e.g. cable, satellite).</p>	<p>These viewers still rely heavily on traditional platforms but are starting to access some of their content on SVOD services and online.</p>	<p>These viewers will choose the platform that best suits their needs at the time.</p>	<p>The vast majority (eight in 10) of these viewers subscribe to a paid TV service and to an SVOD service.</p>	<p>These viewers mainly watch TV and video content online or through an SVOD subscription (e.g. Netflix).</p>
<p>This segment has been in steady decline. At one time it was the largest segment, but as people have moved towards online platforms they now account for only 16% of the Canadian population (59% in 2011).</p>	<p>They account for 20% of the Canadian population.</p> <p>This segment has remained relatively stable over time.</p>	<p>This segment accounts for 15% of the Canadian population.</p> <p>This segment has more than doubled over time (going from 6% to 15% between 2011 and 2022).</p>	<p>They account for 19% of the Canadian population.</p> <p>This is one of the fastest-growing segments. It has tripled over time (going from 5% to 19% between 2011 and 2022).</p>	<p>With the growth in content available online via YouTube and SVODs, this has become the largest segment. They account for 28% of the Canadian population (up from 22% pre-COVID).</p>

¹⁶ Source: MTM-OTM, Canadians 18+, Spring 2022.



Market Influences

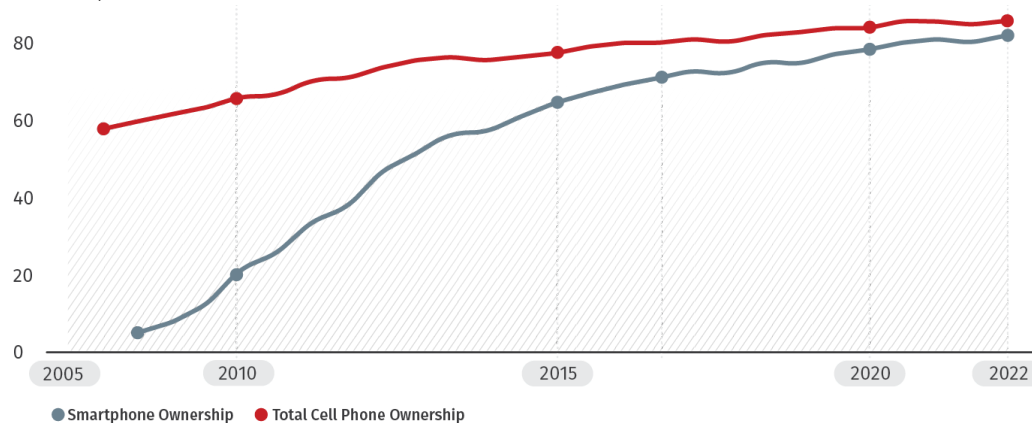
Technology Trends

Continued Shift to Mobile

The trend towards a mobile-first society continues. In 2022, over four in five Canadians used their mobile phone to access the Internet.¹⁷ To connect with Canadians in the digital age, a mobile approach and design must be part of any strategy. Today, 89% of Canadians 18 and older have a smartphone and for many it is the main device for communication and entertainment. Remaining relevant in today's media industry means building for a mobile audience.

Canadian Mobile Phone Penetration¹⁸

Ownership Rates | %



For some Canadians, reliable and fast Internet connection is still a challenge. However, the Government of Canada remains committed to connecting all Canadians to the Internet; and of Canadians without Internet access in their homes, 42% have a smartphone. Many Canadians who are being brought online for the first time will skip desktop computer adoption and choose to only use their mobile device to access the Internet, as seen in emerging countries around the world.

¹⁷ Source: MTM-OTM, Canadians 18+, Spring 2022.

¹⁸ Source: MTM-OTM, Canadians 18+, 2006-22.

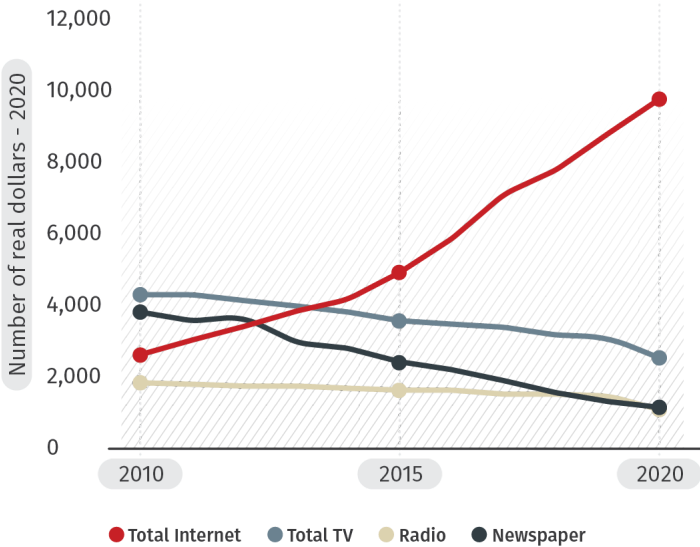
Digital Advertising

Expenditures on digital advertising have been growing immensely throughout the years. The Canadian Media Concentration Research Project²⁰ reports that total Internet advertising dollars have risen from 2.6B in 2010 to 9.7B in 2020 (real 2020 dollars, after adjustment for inflation). In the same period, the advertising dollars spent on television, radio and newspaper have all fallen.

The Canadian Internet advertising market is dominated by the duopoly of Meta and Google. Over the past few years, Meta and Google's position in the market has strengthened as they continue to increase their combined market share, which sat at 80.2% in 2020.

In recent quarters, Facebook has begun to report a loss in its monthly active users. Not only has this had a negative impact on Meta's stock price, but this trend also highlights the potential for a broader maturation effect beginning for the largest social media platforms. These social platforms are significant channels for digital advertising and a loss in user growth presents a risk to these advertising behemoths.

Canadian Mobile Phone Penetration¹⁹
Millions of Real Dollars | 2020 CPI-Adjusted \$



Privacy and Security

Data privacy is a growing trend and investments in digital security and data governance have coincided. Industry leaders are reviewing their data practices, establishing data governance policies and putting user security at the forefront of strategy. Moreover, throughout the industry, companies are becoming increasingly transparent around the use of data.


The privacy concerns related to data collection through the use of third-party cookies has been a hot topic in the past few years. Cookies allow for the collection of web traffic data to track users across the Internet and build customized experiences. Recently there has been progress in ending the practice of collecting mass amounts of user data through third-party cookies. Google has recently announced a timeline extension until 2024 to end the use of third-party cookies in Chrome, joining other browsers who have already ditched the tracking technology.

While the industry is making strides towards finding alternative solutions, the overall consensus is that Canadians expect more transparency and clear evidence of value in exchange for their private data. Technologies are being adopted to enable users to control how their data is collected and shared.

It's critical that businesses place a high priority on the data privacy of Canadians and continue to adjust to evolving privacy and security laws. The development and adoption of new technologies to protect data is paramount to remaining trusted by Canadians.

¹⁹ Source: Canadian Media Concentration Research Project, [Media and Internet Concentration in Canada, 1984-2020](#), December 17, 2021.

²⁰ Source: *ibid.*

The background features a light gray gradient with several large, overlapping circular patterns. Each pattern is composed of numerous thin, concentric lines that form a maze-like or labyrinthine structure. The lines are closely spaced and curve inward, creating a sense of depth and complexity. The overall aesthetic is clean, modern, and technical.

Regulating the System

Proposed Legislation

Bill C-11: the *Online Streaming Act*

The last major reform of the *Broadcasting Act* was in 1991—in the very early days of the Internet. The rise of online streaming services has dramatically changed the broadcasting landscape, and especially how we access audiovisual content and how Canadians listen to music.

On February 2, 2022, the Government of Canada introduced the *Online Streaming Act* to update the *Broadcasting Act* for today's digital world.

The legislation clarifies that online streaming services fall under the *Broadcasting Act* and ensures that the Canadian Radio-Telecommunications Commission (CRTC) has the proper tools to put in place a modern and flexible regulatory framework for broadcasting in Canada. These tools include the ability to make rules, gather information, and assign penalties for non-compliance. Bill C-11 also updates and strengthens various elements of broadcasting policy, including those related to diversity, Indigenous people and Official Language Minority Communities (OLMCs).

Third Reading in the House of Commons was completed on June 21, 2022; and, at this writing, the draft legislation is at Second Reading in the Senate and under consideration by the Standing Senate Committee on Transport and Communication.

Bill C-18: the *Online News Act*

Many Canadians access news content through digital intermediaries (e.g. news aggregators, search engines and social media platforms).

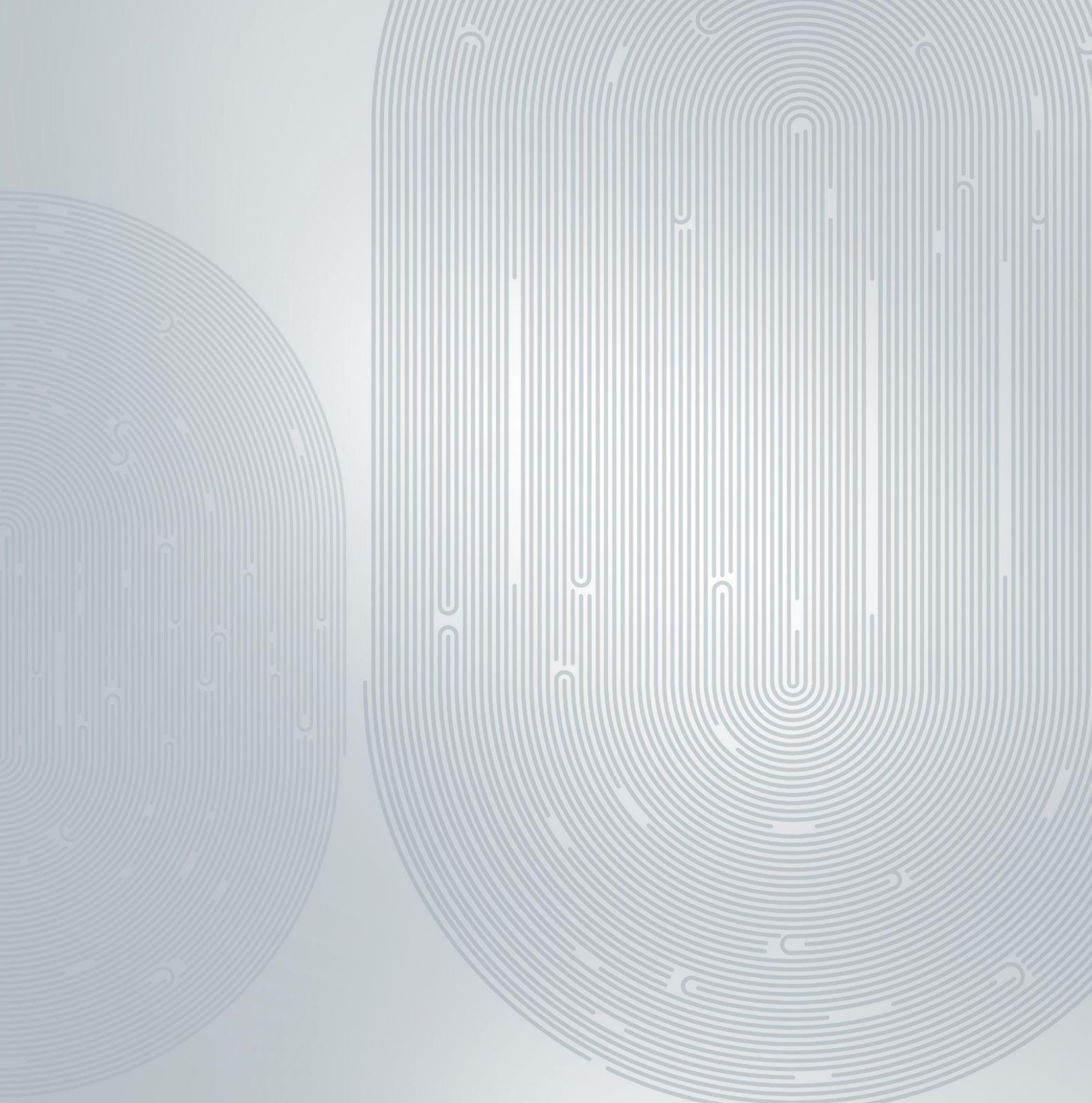
The purpose of this *Act* is to regulate these intermediaries with a view to enhancing fairness in the Canadian digital news marketplace and contributing to its sustainability, including that of independent local news businesses. The Bill introduces a new framework to address an imbalance in bargaining power, and would require designated online giants to consummate fair commercial deals with public and private media organizations for their use of third-party news and information.

Modelled on similar Australian legislation, Bill C-18 would require mandatory negotiation between the parties, and, if required, trigger mediation and final offer arbitration processes.





CBC/Radio-Canada
A Modern Broadcaster



New Direction
for Our Offerings

CBC/Radio-Canada Licence Renewals

On June 22, 2022, the CRTC renewed CBC/Radio-Canada's television and radio licences for a five-year term, effective September 1, 2022.

The decision reflects a modern regulatory approach for the public broadcaster. Broadly, the regulatory framework moves to an expenditure regime for audio-visual services, recognizes the contributions of CBC/Radio-Canada's digital media broadcasting undertakings (DMBUs) to the broadcasting system and imposes spending obligations on independent productions from equity-deserving communities. The CRTC also renewed the mandatory distribution orders for CBC/Radio-Canada's national television news services, ICI RDI and CBC News Network to August 31, 2027 and increased the monthly wholesale rates per subscriber for the services when distributed as part of the digital basic service.

Specifically, under the new conditions of licence, CBC/Radio-Canada is permitted to include programming expenditures on its audio-visual digital programming services toward fulfilling its regulatory requirements. This includes our video streaming services, CBC Gem and ICI TOU.TV.

The CRTC also introduced a new approach to supporting producers from equity-deserving groups. A certain percentage of CBC/Radio-Canada's spending on independent production will be dedicated to Indigenous producers and, separately, to producers located in Official Language Minority Communities (OLMCs). Additionally, there is an overall spending requirement related to independent producers and production companies from the following groups: Indigenous Peoples, OLMCs, racialized persons, LGBTQ2+, and persons with disabilities. Regular consultations with equity-deserving groups across Canada and with producers and content creators from those groups are also part of this new approach.

While providing CBC/Radio-Canada increased programming flexibility across its programming platforms, the CRTC has also imposed new, detailed reporting requirements.

Following the release of CBC/Radio-Canada's licence renewal decision, 16 parties filed petitions to Cabinet expressing their concerns over various elements of the decision.

In September 2022, the Federal Cabinet issued an order-in-council referring the decision back to the CRTC for reconsideration and hearing. The order-in-council requests that the CRTC consider how CBC/Radio-Canada continues to make a significant contribution to the creation, presentation and dissemination of local news, children's programming, original French-language programming, and programming produced by independent producers.





Building
Trust

Trust is fundamental to the success of any kind of business or enterprise. Its presence cements relationships by allowing people to live and work together, and to feel safe and belong.

Recent surveys from numerous sources around the globe indicate that trust in society is in decline—especially trust in governments, some select institutions and even some professions. And while this may be a collateral effect of the COVID-19 pandemic, it is an area that organizations are focusing on and building strategies to address. Earning and building trust is achieved through acting with competence and intent, and trust is lost when these behaviours are not authentically demonstrated.

Trusted sources of news and information for Canadians are vital to democracy. It is generally recognized that trust in mainstream media fosters common agreements on facts, and a shared understanding of reality, and that such conditions are essential for democracies to function well.



Journalistic Trust Initiative (JTI) Certified

CBC News and Radio-Canada Info services are the first Canadian broadcast media to be awarded the Journalism Trust Initiative (JTI) certification by Reporters Without Borders (RSF). Both services receive top ratings for trustworthiness.

JTI scrutinizes a news service's transparency and editorial practices and makes its compliance visible to users. It was launched by RSF and its partners to combat disinformation and promote trustworthy journalism.

News and current affairs are one of the core competencies for public service media, informing citizens with independent, impartial, accurate and relevant news and helping them to better understand the world. This trust relationship is critical for a democratic society and something CBC/Radio-Canada strives for in all its interactions with Canadians.

The background features a light gray gradient with three large, overlapping circular patterns. Each pattern is composed of numerous thin, concentric lines that form a complex, maze-like structure. The lines are closely spaced and curve inward, creating a sense of depth and movement. The overall effect is a subtle, textured backdrop.

Inform, Enlighten
and Entertain

The Destination for Canadian Content

The business of keeping Canadians informed, enlightened and entertained never stops. CBC/Radio-Canada is the only media company present in every part of the country, and the only media serving francophone communities in every province outside of Quebec.

Over 85 Years

Over the course of more than 85 years, CBC/Radio-Canada has been an integral part of Canadian society. We provide news, information and entertainment that has helped shape the culture and identity of Canada. We covered the events that became part of Canadian heritage and serve as a repository of historical moments of the country's past.

From Pepinot to PAW Patrol® — Television of our Childhoods

We are pleased to be the lead partner of the Canadian Museum of History in Gatineau in developing a large-scale exhibition of Canadian children's television programming from the 1950s to the present day. The majority of all audio and video clips, visuals and artifacts featured in the exhibition come from CBC and Radio-Canada. The exhibition entitled "[From Pepinot to PAW Patrol®](#)" marks the 70th anniversary of the start of television youth programming in Canada, and will run until 2023.



But historic memories are only a part of what CBC/Radio-Canada offers to Canadians. We continue to develop, enhance and grow our offerings and services to meet the changing needs of Canadians. We play a critical role in the creation and promotion of Canadian content. [Canada Reads](#), [Les prix Gémeaux](#), the [Canadian Screen Awards](#), the [lunos](#), the [Indspire Awards](#), the [Legacy Awards](#), the [Governor General's Performing Arts Awards](#)... the list goes on.



Some highlights include:

- **Sort Of** which won two prestigious industry prizes: a **Peabody** and the **Banff Rockie Award for Program of the Year** (2021).
- Radio-Canada won awards in 7 of 15 categories at the **Youth Media Alliance Awards of Excellence**.
- CBC Podcasts **The Village**, CBC Radio's **Unreserved** and CBC TV's **Marketplace** were all winners at the Amnesty International Canada 2021-2022 Media Awards in September.
- At the **Toronto International Film Festival**, CBC Films' **Something You Said Last Night** received the Shawn Mendes Foundation 2022 Changemaker Award and **Riceboy Sleeps** won the Platform Prize.
- Radio-Canada productions also stood out at the **Prix NUMIX** awards, which recognize excellence in Quebec digital content, winning in four categories.
- **CBC News** won eight awards and received two honourable mentions at the **Native American Journalist Association Awards**.
- Radio-Canada was this year's top winner at the **Digital Publishing Awards** with an impressive 12 awards—seven Gold and five Silver—in various categories and an additional seven honourable mentions.
- Acclaimed CBC drama **The Porter** was nominated for an **Emmy** award for Outstanding Choreography.
- CBC/Radio-Canada and its production partners were recognized with **52 Canadian Screen Awards** from the Academy of Canadian Cinema & Television. The Canadian Screen Awards honour excellence in scripted, unscripted, documentary, news and sports programming across television, film and digital.
- CBC's flagship program **The National** was twice named Best National Newscast this year by the **Canadian Screen Awards** and the **RTDNA**.
- The new **Maison de Radio-Canada** took home a 2022 **European Broadcasting Union Technology and Innovation Award**.
- Posted in both English and French, our **digital 3D data visualizations** earned a Silver Medal in the category Innovation in Digital Storytelling at the **Digital Publishing Awards**.
- **CBC Vancouver** won the award for their short-form news story Black Artists Design Exhibit on Black Experience at Royal B.C. Museum at the National Association of Black Journalists **2022 Salute to Excellence Awards**.



Partnerships and Collaborations

CBC/Radio-Canada is forging ahead as a modern public broadcaster — more committed than ever to serving all Canadians and working with both domestic and international entities to ensure Canadians have access to the best programs and services we can provide.

Canadian Heritage and CBC/Radio-Canada

Canada's official languages help make our country more open and prosperous, and are a source of wealth for us all. They are at the heart of what it means to be Canadian.

In partnership with the Department of Canadian Heritage, CBC/Radio-Canada has developed "Mauril" (named in honour of the late Mauril Bélanger, a champion of Canada's two official languages). Since its introduction over a year ago, [Mauril](#) has been helping people across the country to learn French and English.

Through the program, Canadians have access to a virtual learning environment, including materials based on current events in Canada, Canadian cultural and artistic content and educational resources to help learners to improve second-language comprehension and expression.



APTN and CBC/Radio-Canada

Earlier this year, APTN and CBC/Radio-Canada announced a collaboration to create more Indigenous content. The agreement enhances both networks' abilities to create First Nations, Inuit and Métis programming, increases access to and awareness of this new content, and connects people, both Indigenous and non-Indigenous, across the land.

In addition to programming, both APTN and CBC/Radio-Canada will collaborate on their common objectives of recruiting, retaining and advancing Indigenous employees and supporting independent Indigenous producers.

BBC and CBC/Radio-Canada

National public broadcasters BBC and CBC/Radio-Canada announced the joint commission of three new original podcasts by BBC World Service and CBC Podcasts, bringing together two world-leading audio producers to create top-quality, high-impact content for global audiences.

The podcast co-productions are an extension of the commitment to collaboration announced by the BBC and CBC/Radio-Canada in 2019. The three podcasts, in production now, are scheduled for release in late 2022 and 2023, and will be available on BBC Sounds, CBC Listen and on most other podcast and audio distribution platforms.

ABC and CBC

ABC, the Australian national public broadcaster and the CBC partnered to create the KINDRED ABC/CBC ANIMATION COLLABORATION, an initiative designed to nurture and support the kids' production industry by funding new children's animated projects in Australia and Canada.

Internal Collaboration

Working together across language markets is nothing new at CBC/Radio-Canada.

CBC Podcasts and Radio-Canada OHdio recently joined forces to tell the story of the murders in Montreal's Village in the early 1990s. *The Village: The Montreal Murders* is on CBC Listen and the podcast *Le Village : meurtres, combat, fierté* is on Radio-Canada OHdio.

Massey Hall and CBC

Building on our extensive shared history, two established Canadian cultural institutions, Massey Hall and CBC/Radio-Canada, are developing new programming initiatives to amplify emerging and established homegrown musical talent. The partnership includes a new dynamic live concert series for national audiences that will be available across CBC platforms, beginning in the fall 2022.

The Library Project

CBC/Radio-Canada's partnership program with public libraries has been created to engage more deeply with Canadians — particularly those living in underserved and underrepresented communities. Libraries offer unmatched proximity to communities and these partnership-driven events help us meet and engage with Canadians, allowing us to hear directly from communities about their realities and challenges to better serve them.

The launch of the new CBC Corner (L'espace Radio-Canada) is coming soon to local libraries. This digital space, created especially for library visitors, brings together the wide range of CBC and Radio-Canada content and resources into a single experience — right in your backyard.





FROM COAST TO COAST TO COAST

VANCOUVER

CALGARY

EDMONTON

WINNIPEG

TORONTO

OTTAWA

MONTREAL

QUEBEC

FREDERICTON

HALIFAX

ST. JOHN'S

Connecting with Communities

Communities are at the heart of what we do as the public broadcaster. We interact with them through our programming and outreach activities every day. CBC/Radio-Canada continues to find formal and creative ways to strengthen our connections with all communities.

The Road to an Indigenous Strategy

CBC/Radio-Canada has been serving Indigenous communities across Canada since the establishment of the northern service in 1958, but has never designed a national plan to serve Indigenous Peoples.

Developing a national strategy requires us to look critically at our relationships with Indigenous Peoples, creators, journalists, suppliers, communities and employees across the country. The work focuses on four areas: our content (TV/radio/digital), workforce, workplace culture and engaging with communities.

Part of this process involved creating a space for meaningful dialogue through engagement sessions across Canada. These meetings gave First Nations, Inuit and Métis people a chance to share their thoughts on how CBC/Radio-Canada represents and reflects their needs, interests and cultures.

Expanding Local News Coverage

Earlier this year, CBC News announced its plan to expand its local coverage by hiring 14 journalists in different regions of the country with the goal of strengthening community connections. Resources were earmarked for Cranbrook, Nanaimo, Lethbridge, Grande Prairie, Brampton, Kingston, Quebec and the Atlantic region, as well as expanding the CBC Indigenous unit, adding journalists in Manitoba, Saskatchewan, Quebec and in Iqaluit. Implementation has begun and will continue over the coming year.

In September 2022, CBC News announced the first journalist in place in Grande Prairie, Alberta.²¹ Grande Prairie is a thriving city with a young, growing population and acts as an urban hub for communities farther north in both Alberta and British Columbia. This new position will provide coverage ranging from local politics to economic issues and community initiatives and will file stories for digital, radio and television.



Radio-Canada Expériences

At Radio-Canada, the desire to maintain a rich relationship with younger Canadians is stronger than ever. In July 2022, Radio-Canada announced new initiatives to expand these relationships including [Rad-MAJ](#) workshops in schools and in local libraries, the Youth Zone Vaisseau, and workshops and school visits in the new Maison de Radio-Canada. Visit the [Radio-Canada Expériences](#) website to see upcoming activities and events.



²¹ Source: CBC Edmonton, [CBC News opens permanent bureau in Grande Prairie](#), September 15, 2022.

A National Accessibility Plan

In 2019, the *Accessible Canada Act* came into law with the goal to create a Canada without barriers by 2040. This legislation requires every federally regulated employer to develop concrete plans for the proactive identification, removal and prevention of accessibility barriers.

CBC/Radio-Canada has created an Accessibility Steering Committee and will be launching English and French Disability Advisory Councils to help create our very first national Accessibility Plan.

Offering Content in Many Languages

For Beijing 2022, CBC/Radio-Canada provided Indigenous-language coverage of men's and women's hockey as well as both the Opening and Closing Ceremonies. Indigenous hosts, working in the Toronto voice-over booth, provided commentary for Radio, enabling us to provide northern radio audiences with Inuktitut play-by-play for some Olympic hockey games on CBC Radio One (Iqaluit and Nunavik).

We also offered multiple live streams of the Beijing Olympics' opening ceremonies, including those with commentary in East Cree, dedicated descriptive video and American Sign Language.



Radio Canada International is CBC/Radio-Canada's multilingual service that allows audiences to explore and, most importantly, understand and gain perspective about the reality of Canadian society, and its democratic and cultural values. In 2022, we added two new languages, Tagalog and Punjabi.

The background features a light gray gradient with several large, overlapping circular patterns. Each pattern is composed of numerous thin, concentric lines that form a maze-like or fingerprint-like structure. The lines are slightly offset from each other, creating a sense of depth and movement. The overall aesthetic is clean, modern, and technical.

Supporting Employee Engagement

The Changing World of Work

It is no secret that the world of work is changing. We're all learning as we go, but we know two things for sure: flexible work is here to stay, and the talent landscape has fundamentally shifted.

The pandemic left a dramatic mark on work culture, with the work patterns we formed in crisis becoming our new normal. Enabling a workplace that is innovative, inclusive and insightful demands a strong strategy. Digitalization, ever-increasing connectivity and other major trends are fundamentally changing labour markets, affecting the quantity and quality of jobs, their locations, and how and by whom they are carried out.

Teleworking

Earlier this year, CBC/Radio-Canada opted for a hybrid work model, combining in-office and at-home work. As a public broadcaster, our operational reality didn't allow us to implement teleworking across the board, nor could we adopt set days every week. At CBC/Radio-Canada, the technical and on-air teams have very different work contexts from those of support staff. Like many other organizations, our teleworking policy couldn't be applied to everybody the same way. Managers were consulted and led the deployment of a workable hybrid model for their teams.

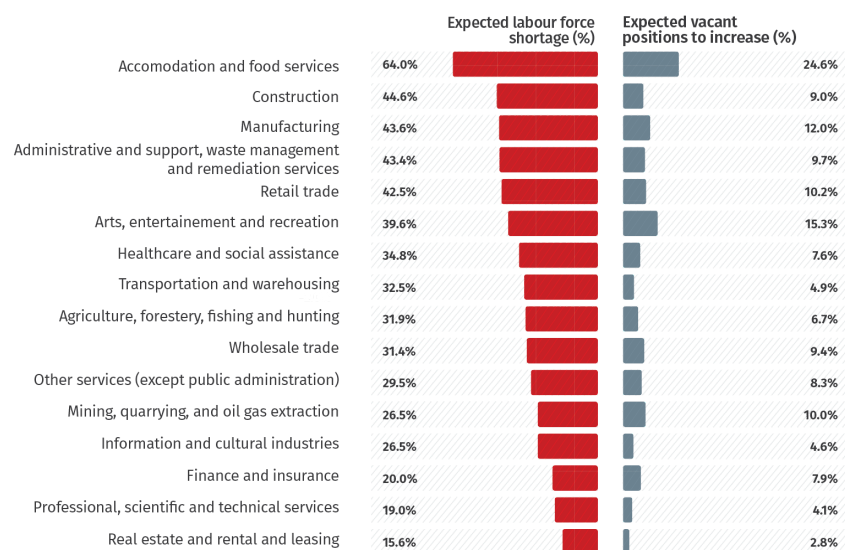
For one year, CBC/Radio-Canada initiated a pilot project so that the hybrid model can be refined as needed. Many other projects are now tied into this new reality, such as the use of work environments and the development of technology assets. This new world of teleworking may transform company culture; CBC/Radio-Canada's leaders are evaluating an array of initiatives to roll out to achieve the desired result.

Labour Market Assessment

Since the COVID-19 pandemic, Canadian businesses have faced many labour challenges. In Canada, one of the leading obstacles across all industries is the shortage of labour.

In the second quarter of 2022, 35.0% of employers in Canada reported expecting a labour shortage in the short term, which is up from 19.5% during the first quarter of 2021.²² The information and cultural industries figures are slightly lower with 26.5% of businesses expecting a labour force shortage, and 4.6% expecting vacant positions to increase.

Moreover, in March 2022, overall job vacancies reached an all-time high and Canadian employers were actively seeking to fill more than one million vacant positions. The challenges of recruiting and retaining skilled labour is also top of mind as approximately a third of



²² Source: Statistics Canada, [Canadian Survey on Business Conditions](#), second quarter of 2022.

Canadian businesses continue to face obstacles. Larger employers, based on staffing size, are more greatly impacted by the challenges of recruitment and retainment. Nearly two thirds (62.8%) of businesses of 100 or more employees expect recruiting skilled employees to be an obstacle over the next three months, while 56.5% expect retaining skilled employees to be an obstacle in the same timeframe.

CBC/Radio-Canada is in a unique position because we rely heavily on Canadian-based talent and seek bilingual employees at a higher rate than most Canadian employers. While the media industry is facing challenges in hiring and retaining talent, CBC/Radio-Canada stands out from many in the industry. Our workforce retention rates are healthy among our counterparts and we are the industry leader for many EDI initiatives which support employee diversity and inclusion to continuously strengthen our workforce. In 2018, CBC/Radio-Canada began voluntarily compiling data on gender parity in key TV production roles. Our 2020-2021 Women in Production Annual Report²³ noted that 53% of our considered productions had 50% or more women in key creative roles.

Based on McKinsey's 2022 Great Attraction global survey, there are three main trends in employee attrition.²⁴

Additionally, the survey highlights the top reasons that employees left their previous role. Lack of career development and advancement, inadequate compensation, and uncaring and uninspiring leaders ranked highest. Employees are also searching for roles with meaningful work, workplace flexibility and support.

Overall, the industry's workforce dynamics are constantly changing and CBC/Radio-Canada is committed to evolving to remain competitive and attractive in the marketplace for talent.

Reshuffling, employees quitting and going to different employers in different industries. **Reinventing**, employees leaving traditional employment are either going to nontraditional work (temporary, gig, or part-time roles) or starting their own businesses. **Reassessing**, employees who have stepped out of the workforce entirely due to the demands of life, dramatically shrinking the readily available talent pool.

- McKinsey's 2022 Great Attraction global survey

²³ Source: CBC/Radio-Canada, [CBC/Radio-Canada Women in Production Annual Report 2020-2021](#), February 2022.

²⁴ Source: McKinsey & Company, [The Great Attrition](#), July 13, 2022.



Workforce Support

The internal Future of Work project has been focusing on providing employees with a modern work experience in this shifting work landscape. The project is centred around the themes of mobility, modernization and employee well-being. A 10-member committee is collaborating regularly to shape the vision of tomorrow's workplace. Thus far, the project has published multiple initiatives including teleworking policies, manager and employee toolkits, along with many upcoming projects like the Workday implementation and our reimagining the approach to e-learning.

CBC/Radio-Canada continues to be committed to offering all employees support in a transitioning world. The CBC/Radio-Canada Employee Assistance Program (EAP) seeks to promote health and well-being by providing a wide range of services to help employees, retirees and their family members address personal and work-related challenges with full confidentiality. The EAP's services include psychological counselling, coaching services for work-life-family support, critical incident support and an advice line for managers and Human Resources employees. All employees and qualifying family members can use the EAP services.

Reducing Barriers

We are committed to combating racism in all its forms, to removing structural barriers and practices that result in discrimination and to improving our workplace culture in tangible, concrete ways. Here are some initiatives and projects currently underway.



INSPIRE

In August 2022, CBC/Radio-Canada announced a new mentorship program. The INSPIRE Mentorship Program pairs seasoned leaders with employees to energize their career development.

Another cycle of the CBC/Radio-Canada EDI Development Fund is currently underway. The Fund helps managers support the development of candidates and employees from five designated underrepresented groups (racialized people, persons with disabilities, Indigenous Peoples, members of LGBTQ2+ communities and women) by offering them development opportunities and/or internships. The program aims to empower individuals, promote professional excellence and foster a greater sense of belonging across the Corporation.

CBC/Radio-Canada, has been recognized for the third straight year with a [Platinum certification for gender parity by Women in Governance](#). It's the highest level of recognition awarded by this organization whose mission is to support women in their leadership development and career advancement.



Radio-Canada's new paid internship program for racialized and Indigenous professionals will launch at the start of the 2022-2023 season with at least 10 paid internships in a range of production trades. This program will be delivered in conjunction with independent producers who develop programming for Radio-Canada.



AccessCBC

A CBC Initiative for
Creators with a Disability

In January 2022, CBC launched a new initiative for creators with a disability. It's a national pilot program for Deaf and disabled creators providing training, mentorship and financing support on selected projects, to create scripted and documentary content. The pilot program is a partnership with the ReelAbilities Film Festival Toronto, which provides creative opportunities and training for persons with a disability who work in film, television and/or video content production.

CBC, BIPOC TV & Film and the Canadian Film Centre recently announced the inaugural participants of a new accelerator program, [SHOWRUNNER CATALYST](#), which supports the career advancement of senior writers who are Indigenous, Black or People of Colour through hands-on and personally tailored on-set experience. Funders of the program have made an initial commitment of three years to the program, with the opportunity to renew.



PATHWAYS

Local initiatives are also underway to reduce barriers and support individuals from racialized and other marginalized backgrounds in pursuing careers in media. [CBC Manitoba Pathways](#) is an excellent example. It is a five-month, paid development opportunity for five members of racialized communities who are passionate about becoming reporters but might not have formal training in journalism or experience in a Canadian newsroom.

Enriching the Learning Continuum



In addition to specific targeted programs, CBC/Radio-Canada offers a large selection of educational resources for all employees. Through resources like **ED** (CBC/Radio-Canada's learning site) employees can access a variety of learning activities and educational resources: classroom courses, online courses, webinars, videos, lunch and learn events and more. The objective is to help every employee, team or department and the organization itself, to learn, adapt and perform at their very best.

Other projects focus on the professional development of specific employees. This fall Radio-Canada introduced *Passerelle*, a pilot project focused on the professional development of employees in the technical sector.

A similar six-month program, the Women in Tech mentorship, was launched in late 2021. The purpose of the program is to increase confidence, community and visibility for women in technology at CBC and Radio-Canada by sharing perspectives on work, and supporting personal growth as employees explore and enhance career development.



Serving Canadians
Wherever They Are

Our service to Canadians spans a range of platforms from traditional channels to digital offerings, from apps to connected TV.



	Service Type	CBC	Radio-Canada
Linear TV	Main Channel	CBC TV	ICI TÉLÉ
	News Channel	CBC News Network	ICI RDI
	Speciality Channel	documentary	ICI ARTV, ICI EXPLORA
Linear Radio	Talk	CBC Radio One	ICI PREMIÈRE
	Music	CBC Music	ICI MUSIQUE
Digital	Main Website	CBC.ca	Radio-Canada.ca
	News Website	CBC News	RC Info
	Youth Website	CBC Kids	ZoneJeunesse
	Youth News Website	CBC Kids News	Maj, Rad
	OTT Video	CBC Gem	ICI TOU.TV (and ICI TOU.TV EXTRA)
	Audio (e.g. podcasts)	CBC Listen	RC OHdio
	Sports	CBC Sports	RC Sports
	Indigenous	CBC North	Espaces autochtones
	Other	CBC Books, CBC Lite	Mordu; RC Archives
	Joint Sites	Mauril, Radio Canada International, Curio; Olympic Network	

Third-party Platforms

- YouTube
- Google News
- Netflix
- Apple; iTunes/ Podcasts/News
- Smart Speakers
- SiriusXM
- Radioplayer
- Spotify
- Luminary

Social Media Platforms

- Facebook
- Instagram
- LinkedIn
- Twitter
- TikTok
- Snapchat