

2024 ENVIROSCAN

CBC Radio-Canada

Foreword

As an eye on the industry, this document provides an overview of the state of the media and news landscape and highlights key shifts that CBC/Radio-Canada, and the nation's media industry at large, are experiencing.

Starting with a demographic analysis, this document explores trends in Canadian audiences before examining the top stories impacting the industry now and into the future.

Corporate Development
November 2024



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Canadian Society



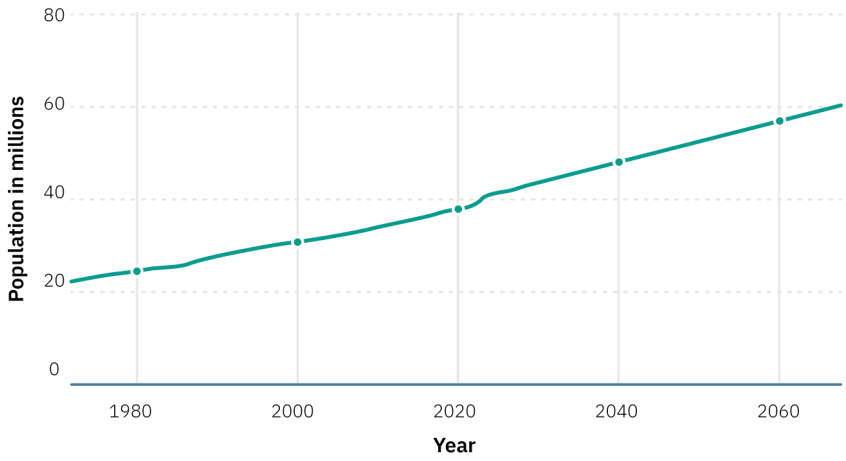
Population Outlook

Between 2016 and 2021, Canada's population grew at almost twice the rate of every other G7 country. That growth has continued. As of April 1, 2024, Canada's population topped 41 million, rising 10.9% since 2021.

This upward trend is driven by international migration (both permanent and temporary), which accounted for 98% of Canada's population growth in 2023.[1] Immigration, Refugees and Citizenship Canada released the 2024 Annual Report to Parliament on Immigration which will cut permanent immigration levels, along with other initiatives such as enacting limits on the number of temporary residents, to tighten Canada's immigration system.[2,3]

Canadians are having fewer children than ever before. Canada is now classified as a low-fertility country, with its 2023 birth rate less than 1.3 children per female.[4] Considering low-fertility rates, the latest forecasts suggest that immigration will drive 100% of population growth by 2032.[5]

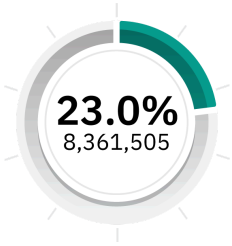
Growth of the Canadian Population[6]
Medium-growth (M1) Scenario



Canada's population is set to shrink in both 2025 and 2026.[7] Looking far into the future, Statistics Canada projects that the Canadian population could reach 62.8 million people in 2073.[8]

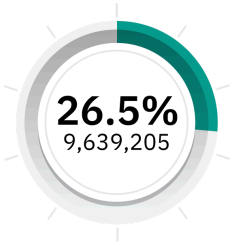
[1] Statistics Canada, Canada's population estimates: Strong population growth in 2023, 2024.
[2] Immigration, Refugees and Citizenship Canada, 2024 Annual Report to Parliament on Immigration, 2024.
[3] Government of Canada, Strengthening temporary residence programs for sustainable volumes, 2024.
[4] Statistics Canada, The Daily — Births and stillbirths, 2023, 2024.
[5] Government of Canada, An Immigration System for Canada's Future, 2023.
[6] Statistics Canada, Population Projections for Canada (2023 to 2073), 2024.
[7] Government of Canada, Government of Canada reduces immigration, 2024.
[8] Statistics Canada, Population projections: Canada, provinces and territories, 2023 to 2073, 2024.

Diversity in Canada



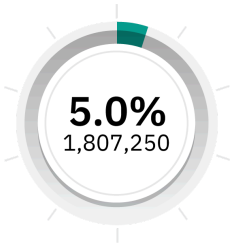
Immigration and Non-Permanent Residents

Nearly one in four people in Canada are immigrants, the highest proportion in more than 150 years. As of 2021, Canada was home to 8.3 million immigrants and over 900,000 non-permanent residents.[9,10] Since 2021, these numbers have continued to grow as Canada has welcomed record numbers of immigrants and non-permanent residents across the country.[11] By 2041, the proportion of immigrants in Canada could range from 29.1% to 34.0%. Some of Canada's largest metropolises have surpassed these rates (Toronto at 46.6% and Vancouver at 41.8%).[12]



Racialized Groups

Correlating with the boom in immigration, the number and proportion of racialized Canadians has been trending upwards for decades. Approximately 83% of newcomers from 2016 to 2021 are racialized.[13] Statistics Canada estimates that approximately 40% of Canadians will be part of a racialized group in 2041, up from 26.5% in 2021.



Indigenous Identity and Language

Canada's Indigenous population continues to grow much faster than the national average. It increased by 9.4% from 2016 to 2021, surpassing the growth of the non-Indigenous population over the same period (+5.3%). The 2021 Census counted 1.8 million Indigenous people, accounting for 5% of Canada's total population.[14] The Indigenous population is young, with 28% of Indigenous peoples under the age of 25.[15]

In 2021, 183,000 people reported speaking an Indigenous language at home on a regular basis. More than 70 different Indigenous languages are spoken in Canada, with Cree languages and Inuktitut being the most widely spoken. However, many Indigenous languages have a declining number of speakers, and the survival of some Indigenous languages are at risk. In 2021, more than 20 Indigenous languages in Canada were the mother tongue of 500 or fewer people.[16]

[9] "Non-permanent resident" includes persons from another country with a usual place of residence in Canada and who have a work or study permit or who have claimed refugee status (asylum claimants).
[10] Statistics Canada, Immigrants make up the largest share of the population in over 150 years, 2022.
[11] Statistics Canada, Canada's demographic estimates for July 1, 2023, 2024.
[12] Statistics Canada, 2021 Census of Population, 2024.
[13] Statistics Canada, 2021 Census of Population, 2024.
[14] Statistics Canada, Statistics on Indigenous peoples, 2024.
[15] Statistics Canada, 2021 Census of Population, 2024.
[16] Statistics Canada, 2021 Census of Population, 2024.

Age

As in many mature economies globally, Canada's aging population is an economic challenge, as a decreasing working-age population must support a growing population of older adults. To balance the rapidly aging population, Canada has looked abroad to attract younger people through immigration. Between July 2022 and July 2023, Canada's working-age population grew for the first time since 2007.[18]

Today, nearly a quarter of the population is aged 18-34, and for the first time, the number of millennials (those aged 27-43) is greater than the number of baby boomers. However, between now and the end of the decade, Canada's population is projected to continue to age, with the 65+ age bracket growing from 19.0% to 21.6%.[19]

Population Projections [17]

Age	2024	2030
0-17	18.5%	17.6%
18-34	24.0%	22.7%
35-49	19.9%	21.1%
50-64	18.6%	17.0%
65+	19.0%	21.6%

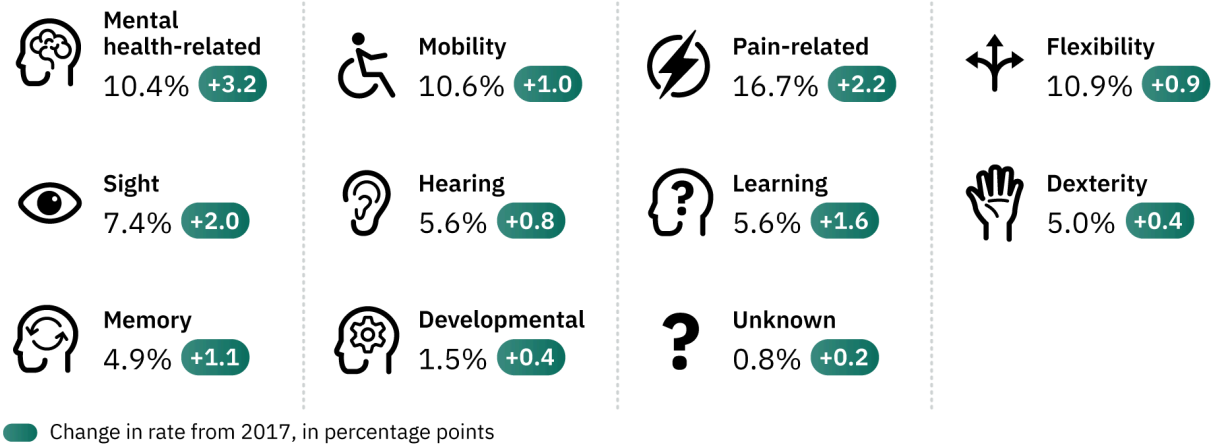
Disability in Canada

In 2022, 27% of Canadians aged 15+, or 8 million people, reported having at least one disability, up from 22% in 2017. This growth was evident in all provinces and nearly all territories.

Pain-related, flexibility, mobility and mental health-related disabilities have the highest prevalence in Canada, with each affecting over 10% of the population. The prevalence of mental health-related disabilities grew the most, with an increase of 3.2% in the five-year period between 2017 and 2021.[20]

Disability Rate By Segment [21]

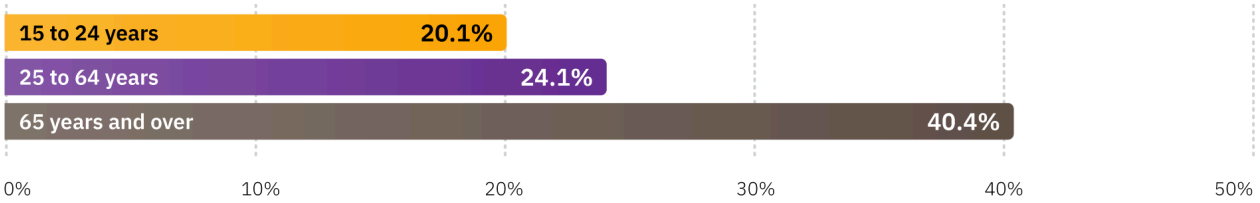
Prevalence among the Canadian Population, 2022



[17] Environics Analytics, Demostats, 2024.
[18] Statistics Canada, Millennials now outnumber baby boomers in Canada, 2024.
[19] Environics Analytics, Demostats, 2024.
[20] Statistics Canada, New data on disability in Canada, 2022.
[21] Statistics Canada, New data on disability in Canada, 2022.

As disability rates increase with age, and Canada's population ages, the number and proportion of Canadians with disabilities will likely continue to increase in the future.

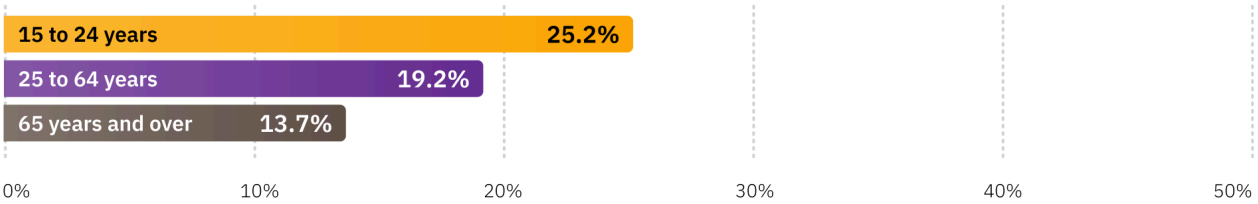
Disability Rate [22]
By Age Group



Official Languages

English and French, Canada's official languages, are both widely spoken. In 2021, 98.2% of Canadians reported English, French or both as their first official language spoken.

Language Bilingualism Rate [23]
By Age Group



The proportion of bilingual English-French Canadians (18.0%) has remained virtually unchanged since 2011. From 2011 to 2021, the increase in the bilingualism rate in Quebec (from 42.6% to 46.4%) offset the slight decrease observed outside Quebec (from 9.7% to 9.5%). Bilingualism is higher among younger generations: a quarter of 15- to 24-year-olds are English-French bilingual, versus 14% of those 65+. Consequently, the bilingualism rate may increase in future years.[25]

		Projections	
Mother Tongue [24]	**Language**	**2024**	**2030**
Official Languages	English	53.2%	50.4%
	French	19.0%	18.1%
Non-Official Languages		23.5%	26.8%

While English and French remain the most commonly spoken languages, the diversity in Canada's languages is greater than ever. The proportion of Canadians reporting a mother tongue of English or French is forecast to decrease in coming years, while non-official language mother tongue rates are projected to increase.

[22] Statistics Canada, New data on disability in Canada, 2022.
[23] Statistics Canada, 2021 Census of Population, 2024.
[24] Environics Analytics, Demostats, 2024.
[25] Statistics Canada, 2021 Census of Population, 2024.

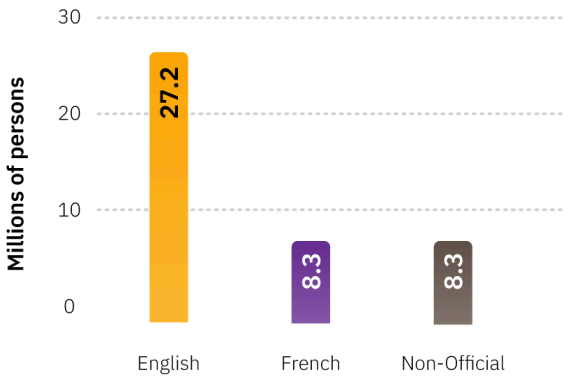


At home, Canadians now report speaking non-official languages at a similar level to French. Approximately 8.3 million Canadians reported speaking a non-official language at home in 2021, and the same number of Canadians reported speaking French at home.[26]

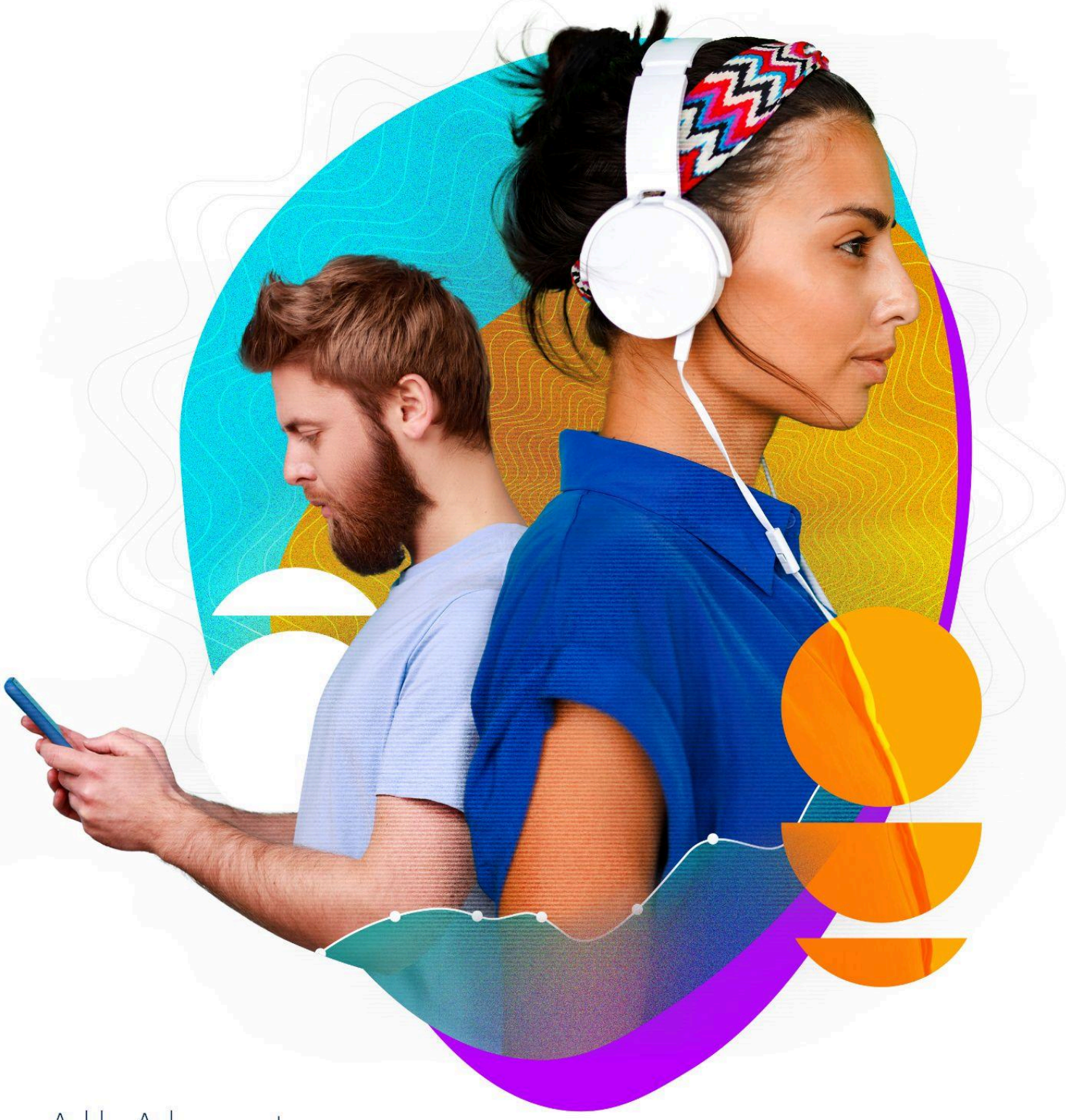
Language diversity in Canada is set to rise and the country's linguistic profile is shifting. The top non-official languages in Canada include Spanish, Mandarin, Punjabi, Arabic, Hindi, Tagalog and Cantonese which are each spoken by over 2% of Canadians.[27]

Languages Spoken at Home [28]

Single and multiple responses



[26] Statistics Canada, 2021 Census of Population, 2024.
[27] Statistics Canada, 2021 Census of Population, 2024.
[28] Statistics Canada, 2021 Census of Population, 2024.



All About Audiences

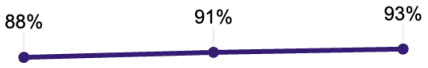
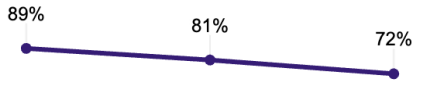
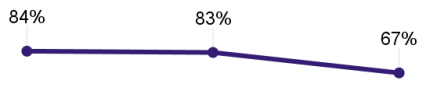
Digital Ubiquity

Canadian audiences continue to shift their media consumption to digital platforms. Accordingly, the media industry continues to invest in an ever-growing number of digital platforms. On average, 32.9 million people use the internet in Canada monthly.[29]

As audiences have moved toward digital platforms, they have moved away from traditional media. The average hours spent online in a typical week nearly doubled from 17.3 in fall 2013 to 31.5 in fall 2023. Over the same period, TV viewing dropped from 13.8 to 11.6 hours per week, and radio listening dropped from an average of 9.4 hours per week in spring 2014 to 5.4 hours in spring 2024.[30]

Having grown up with digital media at their fingertips, children and youth in Canada remain heavy users of digital technologies. In 2024, 98% of Canadians aged 2-17 used the internet every month, the same rate as five years ago.[31]

Weekly internet usage surpassed linear TV and radio usage over 10 years ago. The gap in usage between digital and traditional platforms has continued to grow and shows signs of accelerating as younger generations concentrate their media usage on digital platforms and devices. Declining traditional media usage and dwindling linear audience sizes challenge many legacy Canadian media organizations as they compete in an increasingly crowded space with international competitors like Alphabet (YouTube), Meta (Facebook, Instagram), Spotify, Apple, Amazon, Disney and Netflix.

		2023-24 Breakdown by Age (%) [32]		
Platform	**10 Year Trend** **Canadians 18+ Weekly Usage | %**	**18-34 years old**	**35-49 years old**	**50+ years old**
Internet		95%	97%	89%
Linear TV		56%	67%	82%
Linear Radio		53%	68%	75%
	2013-14 2018-19 2023-24			

[29] Comscore Media Metrix® Multi-Platform, Total Internet Population, average of monthly unique visitors, September 2023 to August 2024, Canada. Total audience.
[30] MTM, Trending platform weekly time spent, MTM 18+, 2013-2024.
[31] MTM, Internet user - past month, MTM Jr., 2024.
[32] MTM, Trending platform weekly usage, MTM 18+, 2013-2024.

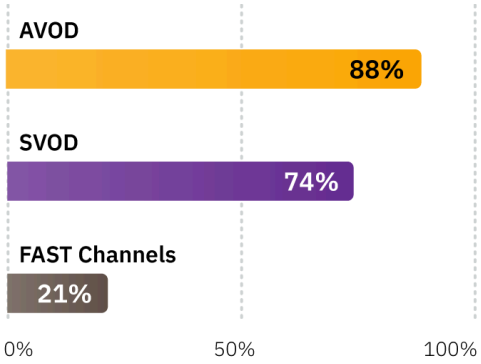
Video

Fewer Canadians are watching linear television, with the Media Technology Monitor (MTM) reporting that 68% of Canadians have a traditional TV service, down from 83% in spring 2019.[33] In contrast, 91% of Canadians report that they watch videos online every month.

Connected TVs have enabled new video consumption options, from the comfort of the living room and on big screens. One of the fastest-growing segments is free ad-supported streaming television (FAST) channels, which one-fifth of Canadian internet users reported watching in spring 2024. Although FAST is becoming more popular, advertising-based video on-demand (AVOD) and subscription video on-demand (SVOD) remain the most-used online viewing options.

Past Month Streaming Usage [34]

Online Canadians 18+ | %



Average Time Spent Streaming Online Video [35]

Viewing Hours per Week | Canadians 18+

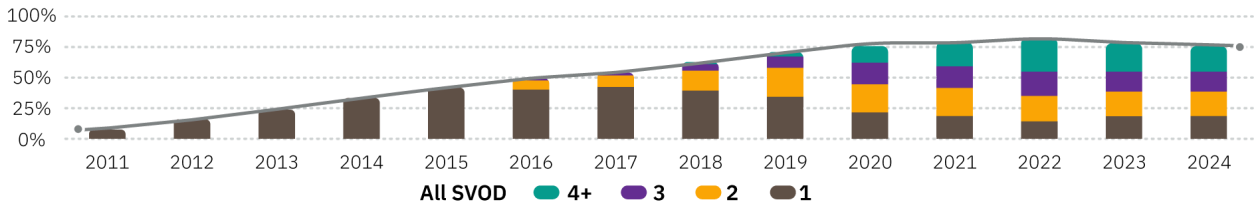


Combined, Canadians 18+ reported watching roughly **3.2 million years** worth of streaming video content in 2024

SVOD subscriptions reached a pinnacle during the pandemic, with Canadians bundling multiple SVODs. Currently three in four Canadians have a SVOD subscription, and 36% of Canadians have three or more SVOD subscriptions, down from a peak of 45% in fall 2022. With the continued roll-out of new offerings, audiences are expected to continue to shift to online video services.[36]

Total SVOD Subscribers [37]

Number of Subscriptions | %



On average, Canadians aged 18 and over report spending 16.8 hours viewing digital video each week, with AVOD, FAST and video on social media seeing the greatest growth in watch time. Canadians are watching on many different devices, as online video no longer requires tuning in via mobile or desktop. Three-quarters of Canadians own an internet-connected TV set, a penetration rate that has doubled over the past 10 years.

[33] MTM, Traditional TV service data, MTM 18+, 2019-2024.
[34] MTM, Past month use of streaming models, MTM 18+, 2024.
[35] MTM, Online video consumption, MTM 18+, 2024.
[36] MTM, SVOD subscriber data, MTM 18+, 2011-2024.
[37] MTM, SVOD subscriber data, MTM 18+, 2011-2024.

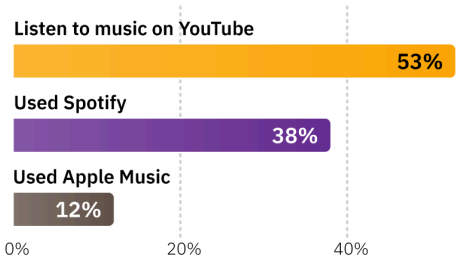
Audio

While linear radio listening continues to decline (and more sharply among those aged 18-34), consumption of digital audio is growing. This year, Canadians aged 18 and over reported spending an average of 10 hours weekly consuming online audio.

Canadians, young and old, now spend the majority of their listening time consuming digital audio content. The past five years has shifted the share ever more towards digital options.

Top Online Audio Platforms [38]

Monthly Usage, Canadians 18+ | %



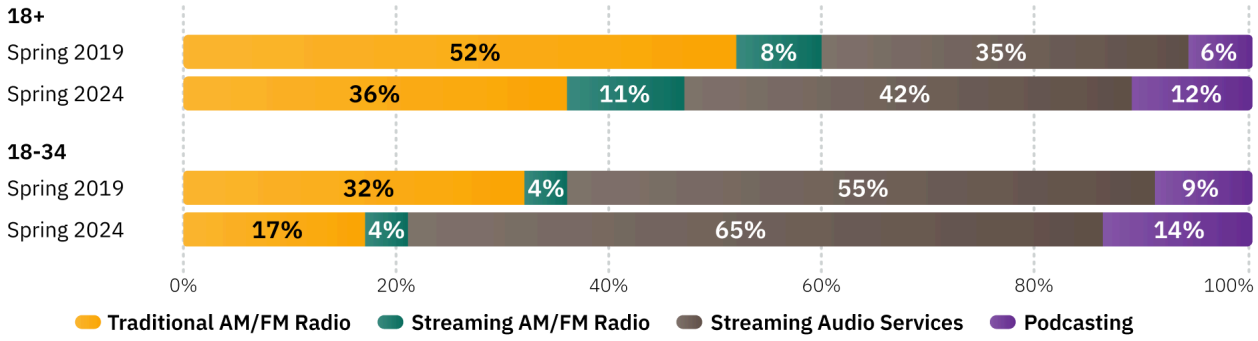
Average Time Spent Streaming Online Audio [39]

Audio Hours per Week | Canadians 18+



Self-reported Audio Hours [40]

By Platform, Canadians | %



Streaming audio services and podcasting are the largest sources of growth between 2023 to 2024. The clear beneficiaries of this growth are the audio market leaders Spotify and YouTube. Spotify is the most popular audio streaming platform — 38% of Canadians report using it relative to 12% using Apple. While YouTube is primarily a video streaming platform, it has launched YouTube Music to further expand its streaming dominance, and 53% Canadians reported listening to music on YouTube in the past month.[41]

[38] MTM, Online audio platform used, MTM 18+, 2024.
[39] MTM, Online audio consumption, MTM 18+, 2024.
[40] MTM, Self-reported audio hours by platform, MTM 18+, 2019-2024.
[41] MTM, Audio streaming service used, MTM 18+, 2024.

Social Media

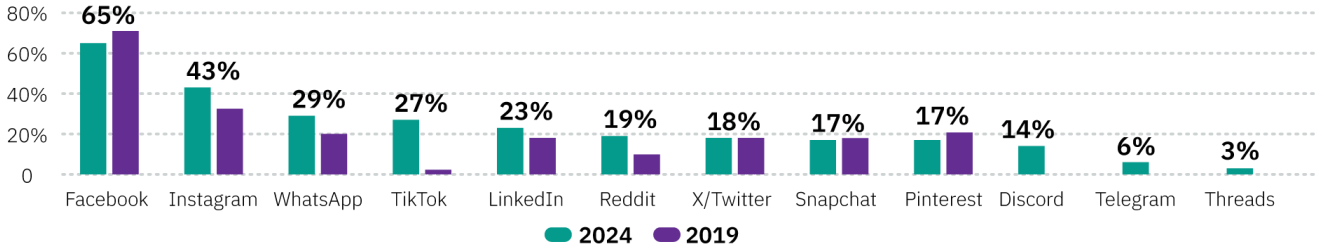
Social media penetration continues to grow; by 2028 it will be virtually ubiquitous. In 2024, roughly 94% of Canadians visit a social networking site at least once a month. This is expected to climb to 98% in 2028.[42] The majority of Canadians use at least one social media platform to keep them up to date with friends, influencers and news.[43]

Growth in social media penetration rates are matched by the continuous rise in the amount of time Canadians spend on these platforms. Social media platform use has become habitual, and weekly hours of usage has increased year over year. On average, Canadian adults spend 11.4 hours every week on social media, up 13% from 2023. Those aged 18-34 report the most social media consumption at 15.9 hours per week, double the time spent by Canadians 50 and older.[44]

Self-reported Weekly Hours of Social Media Usage [45]



Past Month Social Media Usage by Platform [46]
Canadians 18+ | %



The Rise of Vertical Video

The lines between social media and online video are blurring rapidly. Nearly all social media platforms now offer video content, and platforms that make video their primary type of content have grown the most in recent years. Following TikTok's launch and success, other previously dominant social media platforms (Facebook, Instagram, Snapchat) have invested in algorithm-curated vertical video experiences. Most social media platforms now put video at the forefront of the user experience; this has paid dividends in audience engagement and usage. YouTube's launch of YouTube Shorts has made them another leader in short-form vertical video.

[42] Statista, Social network user penetration in Canada from 2019 to 2028, 2023.
[43] MTM, Social media data, MTM 18+, 2024.
[44] MTM, Social media usage, MTM 18+, 2024.
[45] MTM, Self-reported weekly hours of social media usage, MTM 18+, 2023-2024.
[46] MTM, Social media usage, MTM 18+, 2019-2024.

Reaching All Audiences

Hyper-Fragmentation

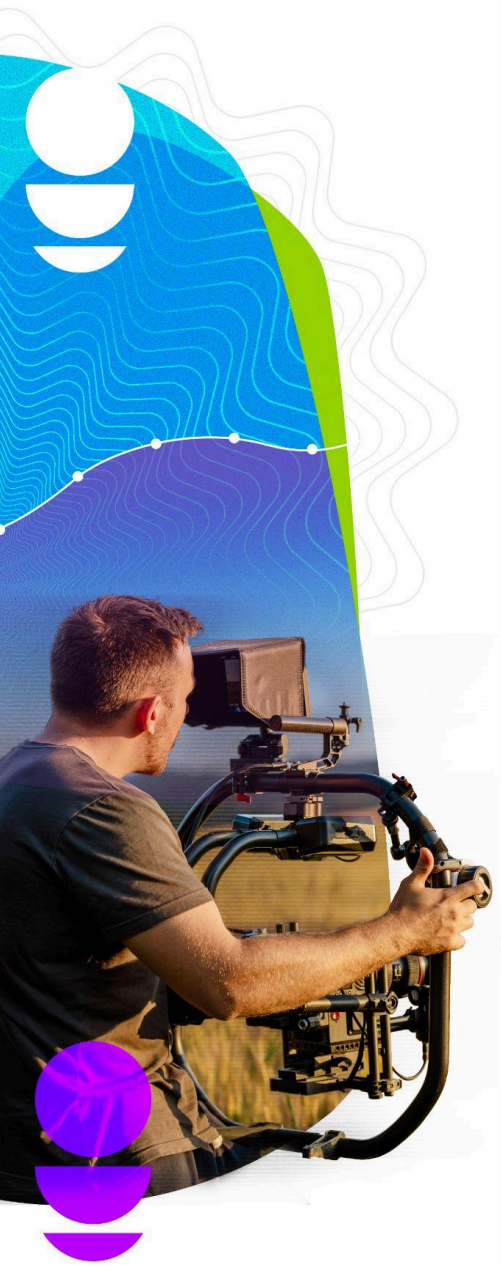
The current media landscape is characterized by unprecedented audience fragmentation. Consumers today have an array of platforms at their disposal, from streaming services and social media to podcasts and newsletters. This accessibility has shifted media consumption from scheduled programming to personalized, on-demand experiences.

The global nature of content distribution has intensified this fragmentation, with creators from around the world producing media for highly specific audiences. Increasingly, consumers seek content in their preferred languages, reflecting their local cultures, while leveraging global platforms. This globalization of content empowers diverse voices but also heightens competition for audience attention, fragmenting the media landscape further.

Technology plays a crucial role in driving hyper-fragmentation. Platforms, particularly those with AI-driven personalized content delivery, leverage user behaviour patterns, cross-web tracking, and predictive analytics. This enables a continuous, individualized feed of media tailored to user preferences.

For the media industry in Canada, hyper-fragmentation creates pressure to innovate, offer localized content and adopt new strategies to stay relevant in an increasingly niche-driven market. Without adapting, existing media brands risk losing the competitive edge they enjoyed by serving large audiences in a linear world that now prioritizes personalized, on-demand digital experiences.





Reflecting Canadian Diversity

Equity, diversity and inclusion (EDI) initiatives are being developed across the media industry. Canada's broadcasting regulator, the CRTC, is exercising its authority in a number of ways to champion such initiatives. The CRTC's plan to modernize Canada's broadcasting framework includes efforts to enhance reflection of Canada's diversity, and an update of its EDI Plan for 2024-27 is under development.[47,48] Moreover, some recent CRTC licensing decisions have imposed new expenditure obligations and contribution requirements for Indigenous and other under-represented communities to ensure that programming and industry participation better reflect Canada's diverse population.[49]

Many initiatives across the industry are underway to expand representation in our industry. The Canada Media Fund (CMF) promotes the funding of diverse production teams and projects, and has committed to further advance equity and inclusion in content production.[50] Recently, the CMF announced its Program for Racialized Communities is investing $10 million in projects by production companies that are owned and controlled by Black and racialized creators.[51] The Canadian Media Producers Association offers producers a number of EDI resources to help create positive change. Organizations like the Black Screen Office, Disability Screen Office, Indigenous Screen Office, and Pink Triangle Press also support, promote and fund projects and talent from under-represented groups.

Survey research is providing insights to fill gaps in measurement. In production, efforts in furthering data collection and analysis are underway to understand the diversity of on-screen talent and equitable allocation of production resources.

[47] Government of Canada, Canadian Radio-television and Telecommunications Commission, 2024.
[48] CRTC, Regulatory plan to modernize Canada's broadcasting framework, 2024.
[49] CRTC, Broadcasting Decision CRTC 2022-165 and Broadcasting Orders CRTC 2022-166 and 2022-167, 2022.
[50] Canada Media Fund, 2024-2027 EDIA Strategy, 2024.
[51] Cartt, CMF to invest over $10M in Black, racialized creators, 2024.

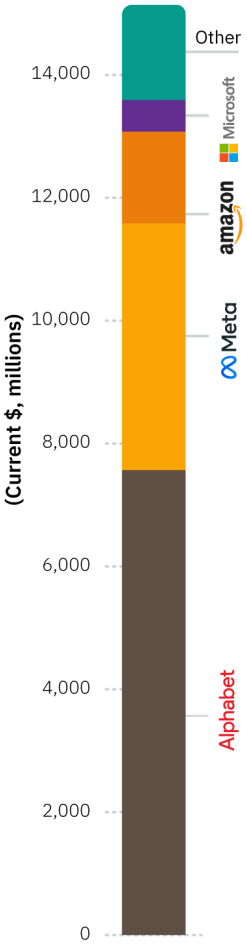


Industry Impact

Big Tech

Big tech is as influential as ever. Audience attention is concentrated among a few large international players, and ad dollars in Canada have followed. With such incredible market power, governments have been trying to regulate these companies. This power struggle between tech and governments has been playing out in real time in many countries, including in Canada.

Internet Ad Concentration In Canada[64]
2022



Today's global technology giants own a majority share of people's entertainment time, along with much of their data. This has led to the concentration of advertising dollars among a few global technology companies. Over 70% of total advertising spending in Canada is on digital ads. In 2022, when ranked by digital ad revenue, the top four players — all international companies — received over 90% of total digital ad spending. Alphabet (Google) and Meta owned roughly 77% of the total market.[52]

In Canada, Bill C-18, the *Online News Act*, is one way legislators have tried to level the playing field and ensure that giant tech platforms fairly remunerate Canadian news organizations for use of their content. Meta and Alphabet made headlines with their different approaches to this bill. Meta's controversial response was to ban Canadian news on their platforms in August 2023; their ban is still in place. Conversely, Alphabet has agreed to pay Canadian news organizations $100 million annually (indexed to inflation), but at this writing no payments have yet been made.[53]

Outside of Canada, governments have been increasing their scrutiny and regulation of tech giants. The European Union introduced the *Digital Markets Act* to regulate "gatekeeper" platforms and companies, specifically Alphabet, Amazon, Apple, Booking, ByteDance, Meta and Microsoft. The Act is designed to allow for more competition and to rein in the power of big tech if they act as gatekeepers and block competition in digital markets. The United States is home to many of the top names in big tech, and US regulators have been slower in their regulation efforts. However, since 2023, the US Department of Justice has filed antitrust cases against both Apple and Alphabet for monopolistic practices.[54]

Technology giants are heavily investing in artificial intelligence (AI), with notable examples including Alphabet's $45 billion R&D budget in 2023, which they state is heavily focused on advancements in AI technologies; and Microsoft's multi-billion partnership with OpenAI.[55,56] The fruit of these investments may reshape the media industry and are raising calls for regulation and oversight. In Canada, the proposed Artificial Intelligence and Data Act (AIDA) aims to guide responsible AI innovation aligned with Canadian values.[57] The EU's AI Act and California's AI-related legislation are other examples of regulatory frameworks being considered or enacted around the world.[58,59]

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[52] Global Media and Internet Concentration Project, Media and Internet Concentration in Canada, 1984–2022, 2023.
[53] CBC News, Google signs deal with organization to distribute $100M to Canadian news companies, 2024.
[54] Reuters, Google antitrust ruling may pose $20 billion risk for Apple, 2024.
[55] Alphabet, Form 10-K, 2023.
[56] OpenAI, OpenAI and Microsoft extend partnership, 2023.
[57] Innovation, Science and Economic Development Canada, The Artificial Intelligence and Data Act (AIDA), 2023.
[58] Future of Life Institute, EU Artificial Intelligence Act, 2024.
[59] White & Case LLP, Raft of California AI Legislation Adds to Growing Patchwork of US Regulation, 2024.



CBC/Radio-Canada:
Building Bonds with Canadians

These are tumultuous times in the Canadian media industry: business models are evolving; audiences are moving to an ever-expanding suite of digital platforms and devices; the competitive set now includes foreign online giants that compete for audiences, talent, and revenues; the costs of production have materially increased; and there are pressures to find efficiencies, consolidate, incorporate new technologies, re-brand and realign content supply agreements. Some media have closed outlets and offices, reduced headcount or significantly curtailed services.

With a mandate to serve *all* Canadians, wherever they happen to live, on whatever traditional or digital platform or device they prefer, CBC/Radio-Canada can effectively support democratic values and national cohesion, reflect the country's vast diversity, and provide a physical and digital presence in, and coverage of, rural, remote, and urban regions and locations (no paywall or cable or satellite subscription required).

In the sections below, we explore some of the ways CBC/Radio-Canada engages, represents, and reflects Canadians – and Canadian values – coast-to-coast-to-coast.

Providing a Wide Range of Content Across Platforms

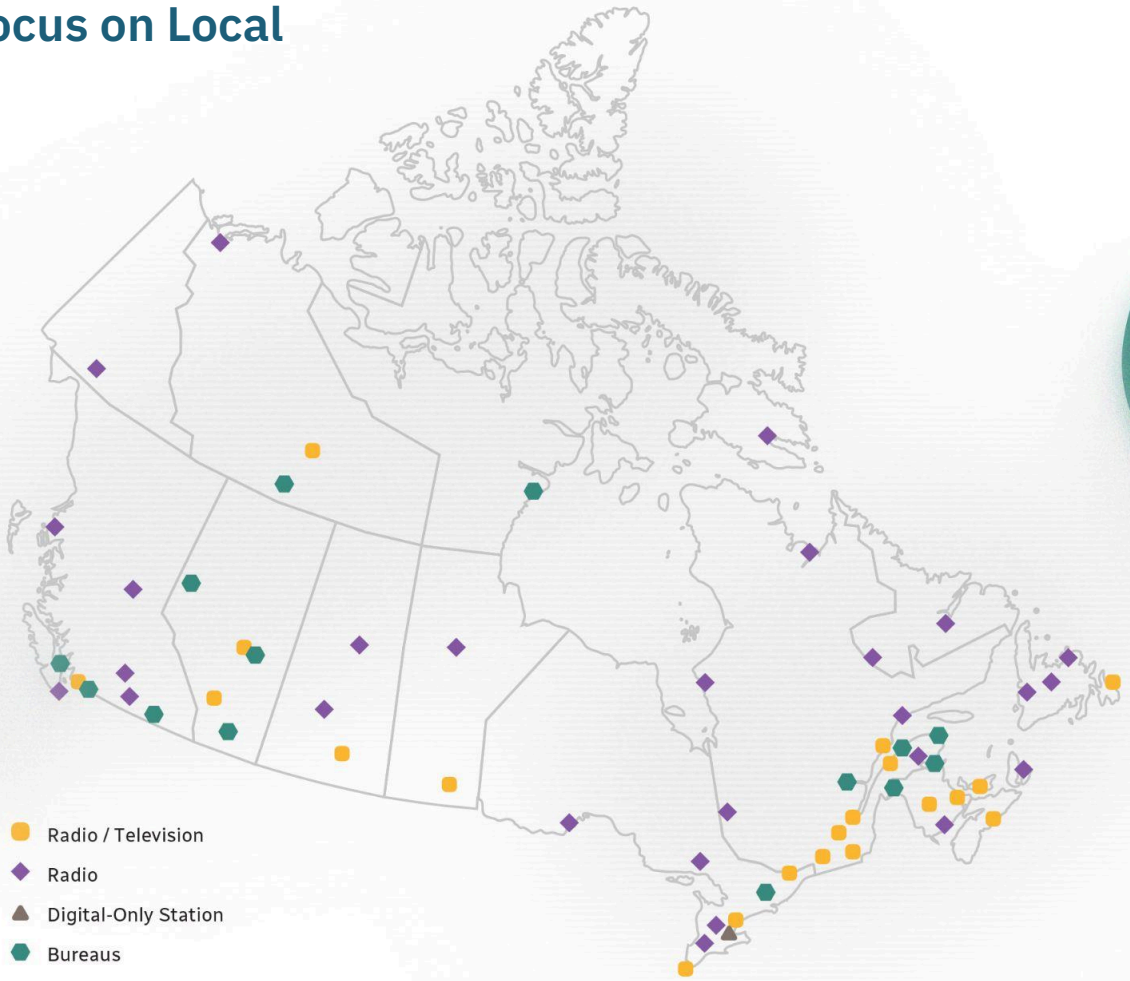
As Canada's public broadcaster, CBC/Radio-Canada serves all Canadians through a wide range of content that includes international, national, regional and local news, public affairs programs, amateur and professional sports, documentaries, arts and culture programs, drama and comedies, variety programs, podcasts, music of all genres, films, and more.

CBC/Radio-Canada is also a national leader in the world of kids and youth programming and content, connecting young Canadians from across the country through services like CBC Kids, Radio-Canada's Zone Jeunesse and its educational platform Curio.

CBC/Radio-Canada reaches Canadians on the platforms they use, through a combination of TV, radio and digital services, including social media platforms and connected TVs.



A Focus on Local



This map shows the locations of our CRTC-licensed radio and television stations across Canada, as well as our designated digital station, our affiliate station and Canadian-based bureaus. Note that digital services are also offered in the other stations. The map does not include our additional newsgathering locations and international news bureaus, whether permanent or pop-ups.

We employ over 7,000 employees from a multitude of backgrounds and cultures. Our people are an integral part of our success in reflecting contemporary Canada.

We are in communities across the country, with 27 television stations, 88 radio stations and one digital-only station. We have five discretionary television channels and four Canada-wide radio networks, two in each official language. Internationally, we have six permanent foreign bureaus (and one in Taiwan), and we have the capacity to set up pocket bureaus in other locations as needed.

It is our presence in communities that makes the public broadcaster vital. Over the past few years we have expanded our local presence to communities such as Kingston, Lethbridge, Grande Prairie, Cranbrook and Nanaimo, as well as a dedicated reporter in the North for *The National*.



Launch of Seven Local Podcasts Across Canada
Earlier this year, CBC News launched seven new local podcasts in communities from P.E.I. to Vancouver Island. These podcasts aim to answer community questions and engage listeners with stories that reflect their local experiences. The initiative expands CBC's regional programming, connecting Canadians with content that showcases local perspectives.[60]



Launching Local FAST News
CBC News launched free 24/7 local news streaming channels in over a dozen Canadian cities, expanding access to trusted, local journalism. These regional news FAST channels join the existing national news FAST channels, CBC News Explore and Radio-Canada Info. The new local streams are available on CBC Gem, the CBC News app and other internet-connected TV platforms. This initiative aims to enhance community connections by delivering localized content for regional audiences.[61]



French News Availability
Radio-Canada's news program *Le téléjournal* offers an array of local coverage for official language minority communities across the country and for smaller markets inside Quebec. Radio-Canada has established over 12 local *Le téléjournal* programs in locations from coast to coast. This allows French-speaking Canadians to access relevant local news in their preferred language through ICI TÉLÉ.



Indigenous News in the North
CBC News and Inuit TV have announced a new partnership to preserve and promote Inuit languages through dedicated programming. Through this agreement, Inuit TV received broadcasting rights to air *CBC News: Igalaaq*, further expanding access to CBC's Inuktitut-language evening news. This initiative strengthens both organizations' commitment to cultural preservation and ensures that essential news reaches Inuit communities.[62]

[60] CBC/Radio-Canada, CBC News launches seven local podcasts across Canada, 2024.
[61] CBC News, CBC News launches local news streaming channels, radio streams, 2024.
[62] CBC/Radio-Canada, CBC News: Igalaaq available on Inuit TV, 2024.

Key Partnerships like Collab

Collab, CBC/Radio-Canada's partnership program with public libraries, engages more deeply with Canadians — especially those who are underserved and under-represented.

Since its launch, our collaborations with libraries have exceeded all expectations, allowing us to build relationships with communities across the country through dynamic in-person events and workshops. The style and format of these activities are tailored to meet our objectives, the libraries' goals, and the unique needs of the communities. They focus on reaching people who we may not normally reach and can include panel discussions, video production workshops, journalism workshops, special performances, live broadcasts and more.

Nearly 34,000
Canadians engaged in person

Over 4,000 hours
present across 210 communities

600+
pieces of local content produced

220+
new relationships with local organizations, authors, artists, etc.

We also offer a digital portal, CBC Corner (L'espace Radio-Canada in French), which helps libraries expand their digital offerings to patrons. The portal features a wide variety of CBC and Radio-Canada content, including news, TV and radio shows, podcasts, children's content, and news in foreign languages — all with a single digital experience. The portal is now available to five million library cardholders in nearly 1,000 library branches across the country. We have also partnered with several national cultural institutions — Ingenium (the Canada Science and Technology Museum, the Canada Aviation and Space Museum, and the Canada Agriculture and Food Museum), NFB, Canadian Museum of Nature, Canada Council for the Arts, and Library and Archives Canada — to publish science and cultural resources on the portal.



An Emphasis on Amateur Sport



Paris 2024 marked CBC/Radio-Canada's 24th Olympic Games as Canada's official broadcaster. We provided audiences with live and on-demand coverage of the world's top athletes across all platforms. Our comprehensive coverage of Paris 2024 featured live broadcasts from every Olympic venue and every Canadian medal-winning moment, totalling more than 3,000 hours of live content across the public broadcaster's multiple platforms.

Record-breaking digital audiences consumed over 24 million video hours of Paris 2024 content on CBC/Radio-Canada's digital platforms, more than double both Tokyo 2020 and Beijing 2022.[63] Seven in 10 Canadians (27 million) tuned into the television coverage of the Paris 2024 Olympic Games broadcast by CBC/Radio-Canada and its partners.[64] The Opening and Closing Ceremonies both reached 12 million or more Canadians, significantly higher than Tokyo 2020 viewership.[65]

For the Paralympic Games, CBC/Radio-Canada partnered with the Canadian Paralympic Committee on the "Greatness Moves Us" campaign that showcased how Canadians can foster an inclusive world through Paralympic sport. The campaign celebrated the pursuit of greatness, tracing the journey of athletes from their earliest dreams to the pinnacle of the world stage.

More than 11 million Canadians tuned in to CBC/Radio-Canada's broadcast coverage of the Paris 2024 Paralympic Games, with record increases across broadcast and digital platforms.[66] For Paris 2024, the national public broadcaster offered the most coverage in Canada of a Paralympic Games to date. Canadians consumed a record-breaking 614,000 hours of Paralympic content, more than double that of Tokyo 2020.[67]

Paris 2024 is one more chapter in Canada's incredible story. Nation-building events like the Olympics and Paralympics bring Canadians together in every corner of the country. That contribution to a "shared national consciousness and identity," as set out in the *Broadcasting Act*, is one of the reasons CBC/Radio-Canada exists. We will continue to ensure free access for every Canadian through to the Olympic Games Brisbane 2032.

While big events, like the Olympics, Paralympics, and North American Indigenous Games can draw large audiences, they also occur infrequently. CBC/Radio-Canada has made a commitment to cover amateur and high-performance sports throughout the year, thereby introducing Canadians to under-exposed Canadian athletes and sports.

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[63] Adobe Analytics, Paris 2024: All Platforms, July 25 - August 11, 2024.
[64] Numeris TV PPM, Total Canada, 2+, July 25-August 11, 2024, Total Canada, Cume Reach.
[65] Numeris TV PPM, Total Canada, 2+, Paris 2024 (July 26 and August 11, 2024) and Tokyo 2020 (July 23 and August 8, 2021), Total Canada, Cume Reach.
[66] Numeris TV PPM, Total Canada, 2+, August 28-September 8, 2024, Cume Reach.
[67] Adobe Analytics, Paris 2024 Paralympics: All Platforms, August 28 - September 8, 2024.

International Collaborations

CBC/Radio-Canada collaborates with broadcasters from around the world. We have, for example, signed Memoranda of Understanding with a number of international public service media, including the BBC, ABC (Australia), Radio New Zealand and ZDF (Germany).

In collaboration with New_ Public, a nonprofit organization focused on building healthy digital spaces and supporting civil and civic discourse, the Public Spaces Incubator is a joint initiative between CBC/Radio-Canada, RTBF (Belgium), SRG SSR (Switzerland) and ZDF (Germany) — and now ABC (Australia) and ARD (Germany).[68] This fall, we announced a two-year extension of Public Spaces Incubator partnership to 2027. The project aims to develop and test innovative solutions that encourage accessible and meaningful online conversations on issues of public interest, free from harassment or bullying. These inclusive exchanges will reflect diverse viewpoints and promote greater empathy and understanding, without suppressing perspectives or ideas.

CBC/Radio-Canada is also committed to addressing the challenges and opportunities facing public service media today. We play an important role in driving engagement with industry leaders to help guide the sustainability of public broadcasting across the globe. In October 2024, we hosted executives from around the globe in Ottawa for the 2024 Public Broadcasters International conference. And, for the first time, an entire day of the conference was dedicated to international challenges and opportunities facing Indigenous communities. At the same conference, CBC/Radio-Canada also presented the Ottawa Declaration, a commitment to fight disinformation with support from the Public Media Alliance and Global Task Force for public media.[69]

This year, Radio-Canada and Radio Télévision Suisse (RTS) announced a partnership to expand their French-language podcast offerings, aiming to reach broader audiences and promote content internationally. RTS became the latest member to join Radio-Canada's European partner network, which also includes Radio France and RTBF under Médias Francophones Publics (MFP). Through this partnership, three RTS podcasts — *Faces Nord*, *Voyage au Gouinistan* and *Nuit blanche* — will be available on Radio-Canada OHdio, while Radio-Canada's *Résistance*, *Anna Caritas* and *L'incroyable histoire* will be promoted on RTS platforms.

[68] CBC/Radio-Canada, Public Spaces Incubator announces two-year partnership extension and addition of Australian and German public broadcasters ABC and ARD, 2024.
[69] CBC/Radio-Canada, Ottawa Declaration: International public broadcasters join Public Media Alliance, Global Task Force for public media, and CBC/Radio-Canada in fighting disinformation, 2024.

Environmental Sustainability

The environment matters to Canadians, and to their national public broadcaster. We have committed to playing a leading role in greening the Canadian media industry. Our five-year environmental sustainability strategy, *Greening Our Story* — covers all aspects of our business – our infrastructure, productions and technology — to create content in ways that actively reduce waste and greenhouse gas emissions from production workflows. Halfway through the strategy, CBC/Radio-Canada has made important strides, some of which are outlined below and in CBC/Radio-Canada's Annual Sustainability Report.



Leading Sustainability Partnerships

CBC/Radio-Canada has led the formation of the Canadian Broadcasters for Sustainability, a group of 22 broadcasters working together to make our productions more environmentally sustainable. We have also spearheaded the Green Frame coalition to reduce the environmental impact of Canadian TV and film production.



Production Reporting on Carbon Emissions

This year, CBC and Radio-Canada released their first-ever industry reports focused on Canadian productions and their associated carbon emissions. The results of these two reports provide insights into the television production activities and genres that are the most carbon-intensive, aggregating and synthesizing data from in-house and independent productions that have submitted albert carbon footprint reports.



Sustainable Studio Spaces

CBC/Radio-Canada's studio spaces in its main production centres in Toronto and Montreal have been recognized by BAFTA albert's Studio Sustainability Standard, the world's first sustainability assessment designed specifically for studio spaces. It's the first time a Canadian media organization has received this designation. In its first year of participation, CBC/Radio-Canada was recognized for the sustainability of its studio operations in several categories, including climate, circularity, management and data.



Sustainable Production Forum

CBC/Radio-Canada once again partnered with the Sustainable Production Forum (SPF) for SPF24, held in September 2024. A full-day event was held in the Toronto Broadcast Centre as part of the SPF's ninth annual global hybrid conference focused on accelerating sustainability and decarbonization in the motion picture industry. The day featured virtual and in-person programming, including keynote speakers, panels, workshops and networking breaks. It continues CBC/Radio-Canada's ongoing efforts to be a leader in sustainability for our industry.

Our Responsibility to Canadians

CBC/Radio-Canada has undertaken a number of initiatives and projects to maintain and engender trust with Canadians.



Journalism Trust Initiative Recertification

CBC/Radio-Canada's national news services, CBC News and Radio-Canada Info, have been recertified by Reporters Without Borders' Journalism Trust Initiative (JTI), an international standard to support trustworthy journalism and transparency. JTI certification strengthens our position as a leader in public trust and sets a precedent for media organizations everywhere to follow international best practices.

Artificial Intelligence

Many forms of artificial intelligence (AI) are already integrated into media industry tools. Suggested text, auto-complete, recommendation engines, translation tools, audio generation and voice assistants — all of these fall near or under the broad definition of AI. What has made recent headlines is "generative AI," a version of the technology that uses machine learning on vast amounts of data to produce high-quality original text, graphics, images and videos.

As with the emergence of any significant new technology, AI poses opportunities and threats. While the future is uncertain, it's clear AI will disrupt society, and journalism, in ways that are still difficult to predict. The widespread availability of powerful generative media tools has challenged the fundamental "seeing is believing" basis of much of our modern news ecosystem. And this fast-moving field will only continue to evolve.

The AI boom continues, not only in its variety of applications but also in the complex discourse surrounding it. Generative AI was a tipping point, due to the human-like nature of the technology and the global virality of the 2022 launch of OpenAI's ChatGPT. The emerging technology has taken the business world by storm.
CBC/Radio-Canada is actively using and experimenting with AI for a multitude of applications.

Our vision for the use of AI aligns with our mission to serve and represent all Canadians responsibly, prioritizing the interests of Canadians while valuing talent and creativity. We are committed to transparency, human oversight and maintaining credibility. AI should be used with careful consideration, ensuring its application does not compromise our Journalistic Standards and Practices. To remain proactive and enable innovation, we have published our approach to Artificial Intelligence.

In addition, CBC/Radio-Canada continues to play a leadership role in the development of AI standards and industry best practices. We are a founding member of Project Origin and the Coalition for Content Provenance and Authenticity (C2PA), which are establishing provenance tools to help users know whether a piece of digital content has been manipulated. Numerous industry leaders, including CBC/Radio-Canada, have joined the Partnership on AI to support its Best Practices for Synthetic Media to create a healthier information ecosystem.

Privacy

This year, we released a broad update to our Privacy Notice for Digital Platforms, regrouping all information with respect to user privacy in one place and thus reinforcing transparency toward our digital audiences. In addition, we have started to deploy a consent management platform (CMP) across our digital platforms, providing users with a simple interface to control their privacy settings. Such tools respond to evolving user expectations and exceed the Corporation's legal obligations with respect to privacy. We have also strengthened privacy practices on all of our youth platforms and content, thus keeping in step with international trends and ensuring the safety of young users online.

Representation and Reflection

National Indigenous Strategy

In early 2024, CBC/Radio-Canada launched a National Indigenous Strategy and announced the creation of an Indigenous Office. The new strategy, *Strengthening Relations, Walking Together*, is a three-year plan to work alongside Indigenous communities with the aim of better reflecting and serving them. The strategy has established four pillars that it strives to advance.

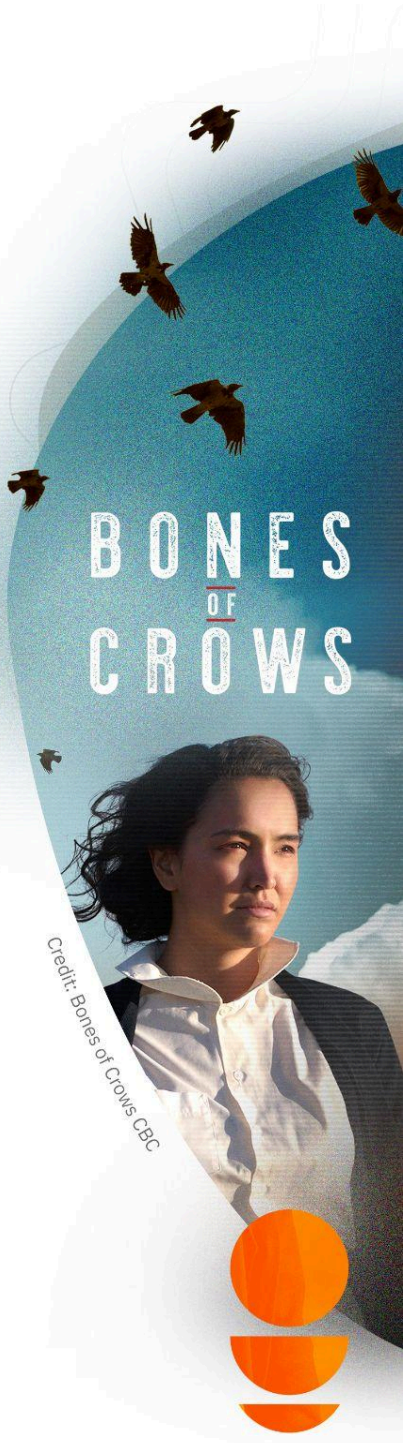
Narratives: Implementing the Truth and Reconciliation Commission principles in our work, supporting Indigenous languages, and providing input into news and content strategies.

People: Increasing Indigenous representation at all organizational levels, with recruitment initiatives like Pathways for Indigenous storytellers.

Relationships: Strengthening ties with Indigenous Peoples, communities and organizations.

Truth and Reconciliation: Taking meaningful actions toward Truth and Reconciliation that includes an historical review of CBC/Radio-Canada's portrayal of Indigenous Peoples to foster more respectful, inclusive and accurate representations.

The new office will help to implement the strategy's 14 objectives and 49 actions, underscoring CBC/Radio-Canada's commitment to Truth and Reconciliation and promoting Indigenous culture, languages and stories.



Credit: Bones of Crows CBC

National Accessibility Plan

In 2023, CBC/Radio-Canada launched a National Accessibility Plan, *Breaking Barriers*. We aim to be the barrier-free public service media organization that Canadians deserve and we are motivated to be a world leader in accessibility. The plan serves as a roadmap to the important work to be accomplished through 2025.

To be accessible to all Canadians, we must make accessibility a priority, both as a broadcaster and as an employer. That means offering an accessible and inclusive employee experience, reflecting disability in our stories and storytelling, and championing accessibility in all that we do by identifying, removing and preventing barriers for everyone.

Championing Women in Sport

CBC/Radio-Canada has committed to gender-balanced sports coverage across all platforms and we've reaffirmed this commitment through two key partnerships. CBC/Radio-Canada was the official broadcaster of the Professional Women's Hockey League (PWHL) in its inaugural season, providing comprehensive coverage of the league's games across multiple platforms. Additionally, we announced a multi-year media partnership with the Northern Super League, Canada's professional women's soccer league, which kicks off its inaugural season in April 2025.

Supporting Our Workforce

We are dedicated to fostering the growth and development of our employees, and we strive to create a work environment that promotes learning, personal and professional growth, and positive experiences. Our commitment to EDI and accessibility is central to this approach, ensuring support and opportunities for our workforce and their communities. Across our people, technology and operations, we focus on building a modern, employee-centric workplace that aligns with our values and nurtures a fulfilling career journey for everyone at CBC/Radio-Canada.

Progress in Progress

We are committed to creating the personal, relevant and engaging experiences that Canadians expect. CBC/Radio-Canada's 2022-2025 Equity, Diversity and Inclusion Plan, called *Progress in Progress*, is our comprehensive plan to place representation, inclusivity and opportunity at the core of our work. Key initiatives include workforce recruitment, promotion and retention, leadership programs for Indigenous, racialized, and 2SLGBTQI+ employees, and increasing diversity in creative roles.

By 2025, we aim to be a leader in Canada and on the world stage driven by our commitment to EDI. Our vision is to inspire change, uphold our core values, and foster spaces for learning, innovation and open dialogue. Through inclusive content that resonates with and reflects the diversity of Canada, we will continue to build and earn the trust of those that we serve.

Our Commitments

1. **Choosing EDI**
   We will recognize and remove barriers by applying an EDI lens in all parts of our work.

2. **Content for all**
   We will ensure our content reflects the experiences of all people living in Canada.

3. **Workplace culture**
   We will foster EDI as a value shared and owned by everyone at CBC/Radio-Canada.

4. **Connected to communities**
   We will connect with underrepresented communities to better understand and meet their expectations and needs regarding CBC/Radio-Canada.

5. **Straightforward communications**
   We will ensure accountability through openness and regular and authentic communication that unite us under a common vision.