

## 2. Performance

### 2.1 Strategic Indicators

#### Measuring our success against Strategy 2015: *Everyone, Every way*

A central feature of Strategy 2015 is the establishment of metrics to track and assess our performance. We have developed a report card that allows us to monitor how well, according to surveyed Canadians, our services fulfill the Corporation’s mandate under the *Broadcasting Act*, and the degree to which our programming adheres to the guiding principles of our strategic plan. Below is the report card covering the 2012–2013 fiscal year, year two of our new strategy. It shows our progress compared to the first year of the strategy (2011–2012) and the benchmark year (2010–2011).

As we now have three years of data, we have commented on the results in the sections below where the data indicated a trend<sup>5</sup>.

#### Report on English Services

##### How does English Services fulfill its mandate under the Act?

CBC's English-language radio and television programming is...	Benchmark Year 2010–2011	Year 1 Year 2011–2012	Year 2 Year 2012–2013
	Average Scores (/10)	Average Scores (/10)	Average Scores (/10)
informative	7.8	7.9	7.9
enlightening	7.4	7.5	7.5
entertaining	7.2	7.4	7.3
available on new platforms	8.2	8.2	8.2

**Metric definition:** Average score is the average of the scores given by all respondents on a 10 point scale.

1 2 3 4 5 6 7 8 9 10

Strongly Disagree Disagree Agree Strongly Agree

Source: TNS Canadian Facts (1,200 Anglophones per survey for a total of 2,400 Anglophones per year). The surveys are conducted in November and March of each year.

During the second year of Strategy 2015, English Services' Radio and Television programming maintained the results it obtained in year one (2011–2012) and the benchmark year (2010–2011).

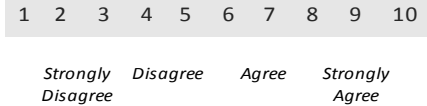
<sup>5</sup> A trend is a consistent movement of data results over time.

Anglophones continue to perceive that CBC/Radio-Canada's English Services is meeting its mandate under the 1991 *Broadcasting Act*, receiving its highest scores for providing content that is "available on new platforms" (8.2) and "informative" (7.9).

**How does English Services' programming fare against the guiding principles of Strategy 2015?**

CBC English-language's programming <sup>1</sup> ...	Benchmark Year 2010–2011	Year 1 Year 2011–2012	Year 2 Year 2012–2013
	Average Scores (/10)	Average Scores (/10)	Average Scores (/10)
is high quality	8.0	8.1	8.2
is different from that offered on other channels	7.2	7.5	7.4
reflects regions of Canada	7.9	8.0	8.0
reflects my region	6.1	6.3	6.5
reflects diversity	7.4	7.7	7.6
reflects my culture	6.5	6.8	6.7

Metric definition: Average score is the average of the scores given by all respondents on a 10 point scale.



1. Programming and content offered on any of our services, i.e., CBC Television, CBC News Network, **bold**, *documentary*, CBC Radio One, CBC Radio 2 and *cbc.ca*.

Source: TNS Canadian Facts (1,200 Anglophones per survey for a total of 2,400 Anglophones per year). The surveys are conducted in November and March of each year.

The implementation of Strategy 2015 continues to be perceived positively by Anglophones, with the gains attained by each Strategy 2015 metric in year one (2011–2012) being maintained in 2012–2013. Scores for each Strategy 2015 metric, measuring alignment to the 'Guiding Principles', were higher in 2012–2013 compared to the benchmark year. The largest increase (7 per cent) was for the 'reflects my region' metric. This metric has improved each year since Strategy 2015 was launched, indicating that the initiatives introduced to-date are resonating with Canadians.

## Report on French Services

### How does French Services fulfill its mandate under the Act?

Radio-Canada's French-language radio and television programming is...	Benchmark Year 2010–2011	Year 1 Year 2011–2012	Year 2 Year 2012–2013
	Average Scores (/10)	Average Scores (/10)	Average Scores (/10)
informative	8.1	8.2	8.2
enlightening	7.8	8.0	7.8
entertaining	7.7	7.8	7.8
available on new platforms	8.0	8.2	8.1

**Metric definition:** Average score is the average of the scores given by all respondents on a 10 point scale.

1 2 3 4 5 6 7 8 9 10

*Strongly Disagree*   *Disagree*   *Agree*   *Strongly Agree*

Source: TNS Canadian Facts (1,200 Francophones per survey for a total of 2,400 Francophones per year). The surveys are conducted in November and March of each year.

In the second year of Strategy 2015, Radio de Radio-Canada and Télévision de Radio-Canada programming maintained results obtained in year one (2011–2012) and the benchmark year (2010–2011). This demonstrates that Francophones continue to feel that CBC/Radio-Canada French Services is fulfilling its mandate under the 1991 *Broadcasting Act*.

French Services received high scores for each aspect of its mandate that was measured, ranging from 7.8 for “entertaining and enlightening” to 8.2 for “informative”.

**How does French Services' programming fare against the guiding principles of Strategy 2015?**

Radio-Canada's French-language programming <sup>1</sup> ...	Benchmark Year 2010–2011	Year 1 Year 2011–2012	Year 2 Year 2012–2013
	Average Scores (/10)	Average Scores (/10)	Average Scores (/10)
is high quality	8.2	8.4	8.1
is different from that offered on other channels	7.6	7.9	7.6
reflects regions of Canada	7.5	7.7	7.3
reflects my region	6.8	7.1	6.7
reflects diversity	7.3	7.6	7.2
reflects my culture	7.4	7.6	7.3

1 2 3 4 5 6 7 8 9 10

Metric definition: Average score is the average of the scores given by all respondents on a 10 point scale.

*Strongly Disagree*   *Disagree*   *Agree*   *Strongly Agree*

1. Programming and content offered on any of our services, i.e., Télévision de Radio-Canada, RDI, ARTV, Première Chaîne, Espace musique, Radio-canada.ca and Tou.Tv.

Source: TNS Canadian Facts (1,200 Francophones per survey for a total of 2,400 Francophones per year).

The surveys are conducted in November and March of each year.

While Francophones continue to respond positively to Strategy 2015 initiatives announced or introduced by French Services, scores for each of the Strategy 2015 metrics, measuring alignment to the 'Guiding Principles', declined in 2012–2013 compared to the previous year. Results for 2012–2013 were also slightly below with those obtained in the benchmark year (2010–2011). Results in 2013–2014 will be closely monitored to determine whether 2012–2013 marks the start of a trend.

## Measuring our Canadian Content

Regulatory requirements for Canadian content on television are specified by the CRTC, which sets expectations of service for Télévision de Radio-Canada and CBC Television. For the broadcast day, a minimum of 75 per cent Canadian content is expected. For the peak period, a minimum of 80 per cent Canadian content is expected. Both measures are averages over the entire broadcast year from September 1 to August 31. As shown in the table below, in the past two broadcast years, Télévision de Radio-Canada and CBC Television have exceeded the CRTC's Canadian content expectations, both over the whole day and in prime time. Increasing Canadian programming is key to our five-year strategic plan, Strategy 2015.

Canadian Content		Yearly Regulatory Expectations	Results Sep. 1, 2011 to Aug 31, 2012	Results Sep. 1, 2010 to Aug. 31, 2011
Télévision de Radio-Canada				
Broadcast day	(Mon-Sun, 6:00 a.m.-12:00 a.m.)	75%	86%	86%
Prime time	(Mon-Sun, 7:00 p.m.-11:00 p.m.)	80%	93%	93%
CBC Television				
Broadcast day	(Mon-Sun, 6:00 a.m.-12:00 a.m.)	75%	85%	84%
Prime time	(Mon-Sun, 7:00 p.m.-11:00 p.m.)	80%	81%	82%

## 2.2 Operational Indicators

In addition to monitoring the overall performance of Strategy 2015 (see section 2.1 above), we have developed key performance indicators (KPIs) for English and French services.

These indicators are critical to measuring our progress towards our strategic business objectives and fulfilment of operational plans, and as such, we formulate them every year as part of the media's business plans.

Operational indicators include measures of audience share, web-site visits, subscriber counts and revenue generation.

### 2012–2013 Results — English Services

2012–2013 proved to be a difficult year for English Services. From a reduction in resources available to provide programming (e.g., Federal Budget 2012 cuts and LPIF) to the revenue effects of the lack of live NHL games and a soft advertising market, there were many challenges to overcome. However, in spite of these challenges, we were able to manage the situation and achieve some success relative to our targets.

For CBC Television's primetime regular season share, three significant changes affected our performance this regular season. These changes were programming reductions as a result of the funding decreases, the removal of highly viewed foreign programming from the early primetime schedule, and the loss of the highly popular *Hockey Night in Canada* from the Saturday primetime schedule for the entire fall period and partly into the winter due to the NHL labour disruption, with significant programming, promotional and revenue implications on our conventional and digital platforms.

As a result, CBC Television's primetime regular season share fell below both the 2011–2012 performance and the 2012–2013 targets.

A further consequence of the lack of *Hockey Night in Canada* was a sharp decline in revenue from television and digital advertising. This drop was somewhat offset by an increase in other types of revenues for English Services and from facilities rentals. Nevertheless, overall revenue was well below targeted levels.

CBC Radio had exceptionally strong audience performance, with a combined 15.3 per cent share of the radio market. Radio One enjoyed its highest ever Fall share, and Radio 2 had its highest Fall share since the programming changes in 2008.

Subscription levels for CBC News Network, **bold** and *documentary* ended the year on or near target and according to plan.

CBC News Network's audience share ended the year almost at target, within a tenth of a share point.

The monthly average of unique visitors to CBC.ca ended the year above 2011–2012 levels, although below target. This was in large measure because of lower performance in the first quarter compared to the same period in 2011, when the federal election and the Vancouver Canucks' Stanley Cup playoff run were strong draws. By contrast, in the third and fourth quarters of 2012–2013, the monthly average number of unique visitors was up 8 per cent year over year.

The monthly average number of unique visitors to CBC's regional sites was up 5 per cent year over year, practically meeting our target (within a half of one per cent of meeting target). Similar to CBC.ca results, in the third and fourth quarters, the monthly average number of unique visitors was up 12 per cent year over year.

Performance of regional television and radio programming was mixed. For Monday to Friday Supper Hour and Late Night local programming on CBC Television, the number of weekly hours viewed increased by 13 per cent, and exceeded the targets which had already anticipated an increase in viewership because of the expanded duration of the Late Night program in many markets.

Radio morning show listening declined year over year, and therefore finished the year below our target of maintaining the 27 per cent increase experienced from 2010–2011 to 2011–2012. The 2012–2013 results were 15 per cent higher than the results from two years ago.

## Performance Table – English Services

English Services		Past Performance			Future
		Annual Targets 2012–2013	Annual Results 2012–2013	Annual Results 2011–2012	Annual Targets 2013–2014
Radio Networks					
CBC Radio One and CBC Radio 2	All day audience share <sup>1</sup>	14.3%	15.3%	14.5%	14.6%
Television					
CBC Television	Prime-time audience share Regular season <sup>2</sup>	8.1%	6.8%	8.6%	8.1%
CBC News Network	All day audience share April-March <sup>2</sup>	1.4%	1.3%	1.4% <sup>3</sup>	1.4%
Regional					
CBC Radio One morning shows	Average weekly hours tuned (Mon -Fri) Regular season <sup>2</sup>	6.0 million	5.5 million	6.0 million	5.5 million
TV supper and late-night news	Average weekly hours tuned (Mon -Fri) Regular season <sup>2</sup>	3.5 million	3.7 million	3.3 million	3.95 million
Regional web pages	Monthly average unique visitors April-March <sup>4</sup>	0.975 million	0.971 million	0.94 million <sup>3</sup>	0.995 million
New Platforms					
CBC.ca	Monthly average unique visitors April-March <sup>4</sup>	6.5 million	6.3 million	6.2 million <sup>3</sup>	6.5 million
Specialty Television Channels					
CBC News Network	Subscribers	11.4 million	11.3 million	11.3 million	11.2 million
<b>bold</b>	Subscribers	2.7 million	2.6 million	2.6 million	n/a <sup>6</sup>
<i>documentary</i>	Subscribers	2.6 million	2.7 million	2.6 million	2.7 million
Revenue <sup>5</sup>					
Conventional, specialty, online		\$399 million	\$362 million	\$399 million <sup>7</sup>	\$400 million

1. Source: BBM Canada, fall survey (diary), persons aged 12 years and older.

2. Source: BBM Canada, Personal People Meter (PPM), persons aged 2 years and older.

3. In 2011–2012, measurement was based on the regular season (i.e. September - March). In 2012–2013 and 2013–2014, measurement is based on the fiscal year (April - March).

4. Source: comScore, persons aged 2 years and older.

5. Revenue for documentary is reported at 100 per cent although CBC/Radio-Canada owns 82 per cent. Includes revenue from LPIF, a fund created by the CRTC to support local programming. Amounts reflect the phase out of the fund over three years ending August 31, 2014.

6. **bold** channel was sold on March 25, 2013.

7. In 2011–2012, measurement excluded merchandising/ licensing revenue which are included in 2012–2013 and 2013–2014.



## Strategy 2015 Future directions – English Services

English Services enters 2013–2014 confident in our ability to connect with and serve our audiences. We will provide those audiences with strong schedules that include new and returning shows. Our digital offers will add to the availability of our content and continue to build on our successes on new platforms. We will engage Canadians and reflect the country in our role as a modern public broadcaster.

Our activities and internal resources are aligned to deliver on the strategic objectives of Strategy 2015. We are constantly refining and re-focusing our content strategies to engage and grow audiences, to increase revenues, to enter partnerships which further our strategic goals – all while remaining focused on our priorities.

### *More Canadian*

English Services will continue to increase the availability of Canadian content to its audiences—where and when they want it. We will leverage our content on all platforms and we will engage audiences.

We will continue to be the home for Canadian entertainment programming, breaking news and enterprise journalism, the celebration of Canadian athletes (especially with the Sochi Olympic Games) and stellar audio content in talk and music formats.

Our KPI targets reflect an increase in CBC Television’s primetime, regular season market share while also setting higher performance expectations for CBC News Network over actual results. The combined Radio share targets reflect goals set in the context of having achieved, in 2012, the highest ever Fall share for Radio One and the highest Radio 2 Fall share in the past five years, as well as the introduction of advertising on Radio 2.

### *More regional*

CBC will build upon the initiatives implemented and announced to better meet the regional needs of Canadians. This includes ensuring regional reflection on the network, strengthening regional connection in communities we currently serve and increasing service to audiences who are under-served by the local CBC content.

Regional performance expectations are to grow the usage to our weekday local television programming, grow unique visitors to our regional landing pages and to maintain the usage of local programming on Radio One compared to the prior year.

### *More digital*

To reach our goal of ensuring that our content is available whenever and wherever Canadians want it, we will invest in new technologies and to ensure an appropriate level of support for the programming offered on all platforms. We will increase digital audience use, reach and growth.

Our performance expectations reflect this focus on digital media by targeting continued growth in the number of monthly average unique visitors to CBC.ca.

*Transformation to invest in strategy and manage finances*

We will continue to organize ourselves to maximize how we deliver content across all platforms and encourage creativity throughout the Corporation. We will increase digital distribution and monetization of CBC content through strategic alliances and partnerships. We will collaborate with Radio-Canada to produce content of national interest.

From an accountability perspective, we will make decisions to minimize costs and drive revenue.

Finally, to assist in the funding of our operations and strategic priorities, we are targeting a substantial increase in self-generated revenues this year.

## 2012–2013 Results French Services

Radio-Canada had an outstanding year in 2012–2013. While pursuing the transformation of its production processes in order to reduce costs, Radio-Canada continued producing and broadcasting relevant and timely content. The programming offer was aligned with audience expectations, resulting in a number of indicators exceeding their established targets.

Many platforms benefited from a highly active news scene. This year, specialty channels captured a combined share of 5.4 per cent, mostly boosted by RDI, which attracted audiences thanks to its live content. With a 10 per cent share increase over the same period last year<sup>6</sup>, RDI recorded its best results in 10 years<sup>7</sup>.

Other results exceeded annual targets owing to a high volume of compelling news stories in 2012–2013, including regional television newscasts (with an average viewership of 347,000 listeners against a target of 290,000) and the regional section of *Radio-Canada.ca* (with a monthly average of 646,000 unique visitors against a target of 497,000). The success of our Première Chaîne regional morning and drive-home shows, as well as the new network noon hour program *Pas de Midi Sans Info*, also explained the strong combined results for radio of 18.5 per cent, compared with a target of 16.0 per cent.

Télévision de Radio-Canada enjoyed substantial success as well, finishing the year with a 20.3 per cent market share – almost 10 per cent higher than last year. The new prime time soap *Unité 9*, which depicts the lives of inmates in a women’s prison, accounted for nearly half of this increase<sup>8</sup>. A strong television programming lineup also contributed to higher traffic on *Radio-Canada.ca*, with a combined monthly average of 2.2 million unique visitors. Many of these visitors also viewed content on Tou.tv, including top drama series such as *Unité 9 and 19-2*, allowing the platform to set new records. Website traffic in January, February and March 2013 was well above the previous years’ results<sup>9</sup>.

RDI achieved its objective, with 11.2 million subscribers, while ARTV finished the year slightly below target.

In 2012–2013, Radio-Canada saw its advertising revenues rise by 5 per cent over last year (up \$6.6 million), in addition to increasing miscellaneous income from services for independent producers, commercial production, and merchandising. Radio-Canada also benefited from funding available through the Canada Media Fund (CMF) for programming procured through independent productions. Together, these positive results enabled Radio-Canada to generate \$252.8 million in revenue, just under the established target of \$253.5 million.

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<sup>6</sup> Fiscal year, April-March

<sup>7</sup> Source: Radio-Canada Research

<sup>8</sup> Cumulative average market share of 42 per cent from September to March, Tuesday 8–9 p.m. time slot. Source: Radio-Canada research

<sup>9</sup> 716,000 unique visitors in March 2013 compared to 500,000 in March 2012, a record for Tou.Tv (January 2013: 644,000 unique visitors) and February 2013 (685,000 unique visitors). Source: Radio-Canada Research

## Performance Table – French Services

French Services		Past Performance			Future
		Annual Targets 2012–2013	Annual Results 2012–2013	Annual Results 2011–2012	Annual Targets 2013–2014
Radio Networks					
Première Chaîne and Espace musique	Full-day audience share <sup>1</sup>	16.0%	18.5%	17.8%	19.3%
Television					
Télévision de Radio-Canada	Prime-time audience share Fall/Winter season <sup>2</sup>	18.2%	20.3%	18.7%	19.5%
RDI, ARTV, Explora	Full-day audience share April-March <sup>2</sup>	4.7%	5.4%	4.6% <sup>3</sup>	5.2%
Regional					
Première Chaîne	Morning shows audience share Mon-Fri 6-9 a.m. <sup>1</sup>	16.0%	17.7%	17.0%	18.5%
TV Newscasts (6 p.m.)	Average viewer per minute Weekly average Mon-Fri 6-6:30 p.m. Fall/Winter season <sup>2</sup>	0.290 million	0.347 million	0.291 million	0.350 million
Regional web pages	Monthly average unique visitors April-March <sup>4</sup>	0.497 million	0.646 million	0.476 million <sup>3</sup>	0.710 million
Website <sup>3</sup>					
Radio-Canada.ca, Tou.Tv, Bandeapart.fm, RCI.net, Espace.mu	Monthly average unique visitors April-March <sup>4</sup>	2.1 million	2.2 million	2.1 million <sup>3</sup>	2.3 million
Specialty Television Channels					
RDI	Subscribers	11.2 million <sup>6</sup>	11.2 million	11.1 million <sup>6</sup>	11.1 million
ARTV	Subscribers	2.1 million	2.0 million	2.1 million	2.0 million
Explora	Subscribers	n/a <sup>7</sup>	0.3 million	n/a <sup>7</sup>	0.4 million
Revenue <sup>5</sup>					
Conventional, specialty, online		\$253.5 million	\$252.8 million	\$228.6 million <sup>8</sup>	\$243.8 million

1. Source: BBM Canada, spring and fall survey (diary), persons aged 12 years and older (2011–2012, fall survey only).

2. Source: BBM Canada, Personal People Meter (PPM), persons aged 2 years and older.

3. In 2011–2012, Radio-Canada websites' and specialty channels' targets and performance were measured from September to March. In 2012–2013 and 2013–2014, measurement is based on the fiscal year (April - March).

4. Source: comScore, persons aged 2 years and older.

5. Revenue for ARTV is reported at 100 per cent although CBC/Radio-Canada owns 85 per cent. Includes revenue from LPIF, a fund reported by the CRTC to support local programming. Amounts reflect the phase out of the fund over three years ending August 31, 2014.

6. In 2012–2013, we discovered an RDI subscriber calculation error impacting annual targets, results to date and annual results. We have revised the figures in the table above to reflect the corrected calculation for all related figures and periods presented.

7. Explora was launched on March 28, 2012.

8. In 2011–2012, measurement excluded ARTV and merchandising/licensing revenue which are included in targets for 2012–2013 and 2013–2014.

## Strategy 2015 Future Directions – French Services

### *Transformation*

In 2013–2014, Radio-Canada will be actively pursuing its transformation in close alignment with audience needs and expectations. To stay on course toward a balanced budget and longer term sustainability, we will continue to adapt production methods, business models and processes, and current/future resource planning and allocation methods, while maximizing all revenue sources. To successfully complete this transformation, Radio-Canada will be relying heavily on innovation, as well as the engagement and cooperation of all employees.

### *Programming strategy*

Once again, this year Radio-Canada is renewing its commitment to deliver original, predominantly Canadian programs and content that stand out for their quality, distinctiveness and relevance to our target audiences. Programming will reflect the country's regional and cultural diversity like never before, while presenting a variety of voices across all platforms. Numerous collaboration opportunities between Radio-Canada and CBC will help enrich content with national resonance. Some prime examples include the two networks jointly producing the 2014 Winter Olympics and pre-Olympic-year programming, as well as developing a concerted music strategy.

Despite the exceptional nature of 2012–2013 results, the targets for the main Television network and radio services, *Première Chaîne* and *Espace musique* combined, have been established on the confident assumption that audiences will continue to enjoy the Radio-Canada program offering in 2013–2014.

### *Regional strategy*

Radio-Canada's new positioning will be felt in the local communities through an increase in regionally rooted programming. News and current affairs will be given pride of place in a lineup designed to increase the overall audience impact of regional content across all platforms. In line with 2012–2013 results, the 2013–2014 targets for radio morning shows, supper-hour newscasts and the Radio-Canada.ca regions section reflect this focus.

### *Platform strategy*

Radio-Canada's digital platforms provide Canadians with a wide range of interactive, personalized content experiences that are enriching, innovative and entertaining. They reflect the public broadcaster's intention to adapt, in an agile, timely manner, to the needs and realities of a world where users can view, listen to, consult and consume content in so many different ways. Specialty services are an integral part of Radio-Canada's multiplatform strategy for engaging audiences.

Note that the target for specialty channels will now include *Explora's* share as we now have historical results for one year. For its part, the *Radio-Canada.ca* group's target now includes *Radio-Canada.ca*, *Tou.tv*, *rcinet.ca* and *Espace.mu*. It no longer includes *bandeapart.fm*, given that the site was shutdown in June 2013.