

Audio on Demand: CBC/Radio-Canada and the Digitization of Radio Services

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As a platform for communication, radio played an integral role in Canada's development as a nation. Like the railway system that connected the geographically broad country, the establishment of the Canadian National Railways Radio network in 1923 connected listeners from coast to coast with varying programming, often to entertain listeners on the train and those within proximity to the service. The network eventually became the backbone for the Canadian Broadcasting Corporation, which continues to serve the nation as a broadcaster of both radio and television services. Today CBC/Radio-Canada's radio programming continues to provide listening experiences to Canadians across the country, with broadcasts composed of news, talk shows, entertainment, documentaries, music, and more through both English and French radio services. The Canadian Broadcasting Corporation maintains both a national and international audience with FM radio listeners in the United States, and a global reach through its library of podcast programs. The success of the public broadcaster is illustrated with its dominant place in the market. According to the Canadian Radio-television and Telecommunications Commission [CRTC] (2019), CBC Radio One's talk radio format was the most popular in Canada's English-language radio market in 2017, maintaining 13% of English tuning shares. Its French counterpart, ICI Radio-Canada Première, held 17% of French audience tuning shares.

With the disruption brought to most media industries by the advancement of contemporary internet technologies, radio content has continued to thrive in the digital age at the cost of the radio medium. Promises of faster internet speeds and greater mobile data access have steadily encouraged the focus of audio and visual media services to streaming platforms such as Netflix and Spotify. In response to the demand for easy access to curated content, content providers have turned to streaming to remain relevant in a changing environment. Like other public radio broadcasters, the Canadian Broadcasting Corporation has adapted by providing

digital content through smart-device streaming, podcasting, and online radio. In October 2019, the public broadcaster launched its CBC Listen service, combining their CBC Radio and CBC Music applications as a means of making all of their audio programming available from one location. While the CBC Listen application is of great interest in understanding the corporation's response to the changing radio climate, information pertaining to its impact is limited. To provide insight on what a digital future may look like for CBC/Radio-Canada, this research will examine the adoption and development of digital audio services in fulfilling the corporation's mandate.

The outlook of the Canadian Broadcasting Corporation's broadcasting services was summarized in the strategic plan *Strategy 2020: A Space For Us All*, highlighting the goal to double the number of Canadians reached by digital means (Canadian Broadcasting Corporation [CBC], 2016e). With its focus on improving its position in the digital realm, CBC/Radio-Canada needs to embrace the technology and its advances. The broadcaster's approach has been multi-tiered with its library of podcast programs, satellite radio broadcasting, and both its online music and radio streaming services. Rather than situate the emergence of internet technology as an end for traditional radio broadcasting, Berry (2016) notes that the platform has historically found ways to adapt to changes (p. 668), interpreting the medium as a malleable and constantly changing platform. Tremblay (2016) shares a similar sentiment, highlighting the need for public service media to lead the way when overcoming challenges presented by the changing media landscape (p. 199). He notes that this adds constant pressure to public service providers, who often face challenges acquiring adequate financial resources. Discussion surrounding advertisement revenue adds to the challenge. A 2020 report released by Innovation, Science and Economic Development Canada (2020) sees the role of CBC/Radio-Canada as being a provider

of high-quality content free of advertising across all platforms (p. 13). While the report recommends funding commitments of at least five years with the public broadcaster (p. 35), the historical targeting of the Canadian Broadcasting Corporation's funding as a way to reduce government spending still remains a concern. Since the late 1990s, the public broadcaster has been an early adopter of internet as a means to increase the broadcaster's presence and reach. O'Neill (2005) summarized a number of adaptations the corporation made to utilize the growing popularity of internet technologies, including the broadcaster's success in deploying modes of audio delivery new at the time. These included podcasting, legal music downloads, and digital audio broadcasting (p. 183). When examining digital distribution for CBC/Radio-Canada's content, the broadcasting corporation has generally led the way in adopting new platforms. Fauteux (2015) positions CBC/Radio-Canada as a notable supporter of satellite radio, providing Canadian music on CBC Radio Three. Using its licensing with Sirius and XM, the public broadcaster uses satellite radio as a platform to feature a wider variety of Canadian indie artists exclusive to the subscription platform. Its FM radio broadcast meanwhile promotes popular Canadian artists to continue generating profit (p. 314). Examining the development of podcasts from CBC Radio/Radio One, Cwynar (2015) highlights the broadcaster's primary use of the medium as a means of extending CBC Radio One's programming over the creation of podcast-first series. Rather than promote the platform as a unique form of content, the author argues that for CBC/Radio-Canada, podcasting is first and foremost a way to promote the CBC/Radio-Canada brand (p. 192-3). Although this is true for many of CBC Radio One's regularly scheduled programs like *Quirks and Quarks*, *Under the Influence*, and *As It Happens*, the public broadcaster has expanded its library to include 126 different series. While the future of Canadian Broadcasting Corporation is focused on phasing in internet-based services as part of radio's

evolution, it may not entirely replace traditional CBC/Radio-Canada stations altogether. In describing the example of the digital-only CBC Hamilton, Taylor (2016) details a survey of Hamilton's residents to collect feedback on the digital service. Although it generated positive feedback in some areas, it also found that nearly 90% of respondents still wanted a traditional CBC/Radio-Canada station, while 91% wanted local audio programming similar to other Ontario communities, including Kitchener/Waterloo and Toronto (p. 12). Listeners continue to seek out local programming through traditional radio stations, which provide a more intimate view of the community than what's made available on other CBC/Radio-Canada services. Though conventional radio has continued to maintain an audience, Bélanger and Manchester (2013) observed that the demographic of listeners was changing as individuals in the 18-24 and 12-17 age groups, who had previously been the target audiences for popular radio, have steadily consumed less radio (p. 359).

This research is concerned with exploring how the Canadian Broadcasting Corporation's radio services have been affected through the adoption of digital technology. In October 2019 the public broadcaster launched their latest streaming application, CBC Listen. Described as a place where "Live Radio shows, CBC Podcasts and CBC Music Playlists live – all in one place" (CBC, 2019c), the service is meant to merge all existing audio streaming services provided by CBC/Radio-Canada into one location. CBC Listen marks an important advancement in the Canadian Broadcasting Corporation's long-term goals for digital audio streaming. However, the three months in which it has operated will provide limited data to be immediately useful. This research aims to provide literature useful for future discussions of the implementation of digital technology in public radio broadcasting. As it intends on providing a basis for future discussion, this paper provides insight into the future of the Canadian Broadcasting Corporation's digital

services based on the ongoing transformation of traditional media platforms, as well as provide context for future discussions.

To gain a broader understanding of how the adoption of digital distribution methods will impact the future of CBC/Radio-Canada's radio programming, documentation made publicly available from the Canadian Broadcasting Corporation provides the primary source of data. Examining their publications provides direct insight into the short-term and long-term goals of the public broadcaster and how they change each year. While statistical information such as annual reports provides qualitative data on the public broadcaster's media operations, such as yearly operational expenses and generated revenue, the published information was found to be too broad in its range. Economic data for example did not break down revenue and expenses into platform-specific detail. Information related to CBC/Radio-Canada's digital platforms also only addressed them as a whole, rather than making distinctions between audio-based digital programming, video streams, and other online-based resources. Rather than attempt to draw conclusions based on this quantitative data, the research instead analysed official documentation published by the public broadcaster on a qualitative level to underscore and discuss the development of digital services in light of corporation's mandate. Publications used for analysis include the Canadian Broadcasting Corporation's annual reports dating between 2015-2016 and 2018-2019 (four documents total) and the Corporate Plan Summaries for the 2016-2017 to 2020-2021 and 2019-2020 to 2023-2024 periods were analysed for their discussion of radio and other audio-based productions in relation to changing consumer environments, new technologies, and any additional concerns. A 2020 report tabled by the Broadcasting and Telecommunications Legislative Review Panel titled *Canada's Communications Future: Time to Act* (Innovation,

Science and Economic Development Canada, 2020) was also examined for its changing interpretation of the Canadian Broadcasting Corporation's role as a public broadcaster.

This research was concerned with examining how the Canadian Broadcasting Corporation's development of digital audio services impacts its corporate mandate through the literature published. An understanding of the public broadcaster's role in Canadian broadcasting was first established through the latest Broadcasting and Telecommunications Legislative Review published by the Innovation, Science and Economic Development Canada (2020), which sought to update the mandate of the public broadcaster. Within the document, the role of CBC/Radio-Canada is to produce content which "informs, enlightens, and entertains," expressing the diversity of Canada's population through high-quality content (p. 163). To respond to the changing and increasing competitiveness of the media communications environment, the review panel made several recommendations to allow the Canadian Broadcasting Corporation to respond to changes for the benefit of Canadian citizens. Recommendation 79 requests the removal of specific reference to television and radio in the public broadcaster's mandate. This change encourages the use of digital services and other means to explore new methods of content distribution, with specific interest in experimentation with different distribution methods to reach Canadian citizens across a broad range of platforms and media (Innovation, Science and Economic Development Canada, 2020, p. 163). Recommendation 80 suggests the amendment of the Broadcasting Act to reflect a more current mandate for CBC/Radio-Canada, aiming to shape the public broadcaster into a public media institution (pp. 165-6), including "showcasing Canadian content to international audiences; and taking creative risks" (p. 166). In a 2016 update on CBC/Radio-Canada's strategic plan *Strategy 2020: A Space for Us All*, three priorities are highlighted as part of the public broadcaster's

evolution: creation of more distinctive quality Canadian content, an increase in local programming, and the transformation of the Canadian Broadcasting Corporation into a digital-first organization (CBC, 2016a). The document acknowledges that growing engagement with digital media platforms has disrupted traditional media industries, consolidating control over many media domains into the hands of a select few such as Facebook, Google, and YouTube. In response to these changes, CBC/Radio-Canada's focus for its digital-first metamorphosis is placed on its Canadian identity. Both benefitting from and competing with global digital media giants, the Canadian Broadcasting Corporation prioritizes its Canadian audience by producing and distributing Canadian-owned and produced content. In addition to its global identity, CBC/Radio-Canada has expanded its online presence with the launch of several programs to expand the public broadcaster's digital presence in innovative ways, including the launch of CBC Music and Radio-Canada's Première PLUS (p. 9). When comparing the annual reports published by the Canadian Broadcasting Corporation, discussions around radio content remain largely the same.

Examination of the Corporate Plan Summaries for the 2016-2017 to 2020-2021 period and 2019-2020 to 2023-2024 provide different outlooks when discussing radio. The 2016-2017 to 2020-2021 Corporate Plan Summary (CBC, 2016c) indicates a steady decline in general music audiences from 2005 to 2015, while talk radio remained consistent (p. 10). Meanwhile the document suggests that listenership for CBC/Radio-Canada's radio services continues to remain strong, claiming that the transition from radio to new platforms has not impacted the Canadian Broadcasting Corporation's radio services (p. 12). The growth of audiences using digital platforms is mentioned as part of the corporation's strategy for talk radio (p. 23), though it lacks details on the strategy to be implemented. The plan to consolidate English and French digital



music services provides the most detailed strategy in transforming audio services to digital (p. 25). Meanwhile, the 2019-2020 to 2023-2024 provides greater insight into the audio-based initiatives achieved at the end of Strategy 2020, including the launch of CBC Listen, the addition of interactive services to voice-activated devices, and the achievement of 625 million downloads at the end of the 2018-2019 year, and an ongoing partnership with Spotify to distribute CBC/Radio-Canada audio content (CBC, 2019b, pp. 13-4). Overall the 2019-2020 to 2023-2024 Corporate Plan Summary provides the greatest insight into projects undertaken by CBC/Radio-Canada to experiment and expand upon digital access to radio services and other audio-based mediums. The 2015-2016 annual report's business highlights define the shift toward digital as being intertwined with existing media platforms, rather than being treated as a separate entity to develop (CBC, 2016b, p. 7). The success of Première PLUS as an on-demand radio station helped to shape the priorities for the following year, with the introduction of a mobile app and more digital original content promised for the French service along with enhanced programming for CBC Music (p. 23). Cultivation of digital skills for staff of CBC/Radio-Canada was highlighted exclusively in the 2015-2016 annual report, with over 1,200 employees across the corporation receiving training to prepare for a shift to a digital world (p. 26). English service highlights in the 2016-2017 annual report call attention to the success of the public broadcasters original audio content. This includes a total of 145 million podcast downloads during the 2016 year, with the program *Someone Knows Something* reaching 21 million total downloads (CBC, 2017, p. 25). Radio-Canada's numerous mobile applications saw improvements as part of the year's "acceleration" towards digital content, including the launch of mobile applications for ICI Radio-Canada Première and ICI Musique, and their inclusion in Radioplayer's free digital radio streaming application as part of a partnership (p. 29). In the report's outlook for the following

year, development of CBC Radio's digital content focuses on producing unique audio content and new methods of storytelling, while Radio-Canada's focus continues on the improvement of existing applications and producing original content (p. 32). The 2017-2018 annual report marks the achievement of Strategy 2020's goal of reaching 18 million audience interactions monthly through CBC/Radio-Canada's digital platforms (CBC, 2018, p. 15). Digital experiences became central in the 2017 year's funding for key strategic initiatives, including the adoption of devices such as smart speakers, increased accessibility for consumers with impairments, and improvement of the digital user experience on the public broadcaster's online platforms (p. 16). The forecast for the following year includes CBC Radio's consolidation of talk, music, and podcasts into a single platform (p. 31), which would eventually become CBC Listen in 2019. Finally the 2018-2019 annual report continues to highlight the importance of discoverability for Canadian content in the wake of a growing stream of international media companies competing for attention (CBC, 2019a, p. 14). It also introduces the three-year strategy to follow *Strategy 2020*, entitled *Your Stories, Taken to Heart*, focusing on deepening the engagement between Canadians and the public broadcaster (p. 15). In addition to strengthening existing branding and improving the ongoing relationship with Canadians, the Canadian Broadcasting Corporation's new strategy includes the goal of providing customized digital services with the goal of ensuring Canadian citizens see themselves reflected in digital services (p. 32). Platforms for CBC/Radio-Canada's news content have also shown an increase with the adoption of YouTube, Google Home, and Alexa as means of distribution (p. 27). Examination of audience access to content reveals that digital audio services such as podcasts and streams are key to reaching younger Canadian audiences, encouraging new forms of engagement (p. 13).

Although the performance measures provided in the annual reports are broad in scope, they provide a few insights into the Canadian Broadcasting Corporation's operations. Across five years of data (2014-2019), both CBC Radio and Radio-Canada's radio and digital offerings met or exceeded their annual targets. The exception is digital services in the 2017-2018 year where diversification into digital services like online radio helped to reduce the impact (CBC, 2018, p. 25). Radio-Canada's ICI Première and ICI Musique's market reach increased steadily from 21.4% in 2014 to 26.5% in 2019 (see Appendix A). Commentary across the documents suggests the success is a result of increasing original programming and success with morning programming (CBC, 2019a, p. 24). Comparable data for CBC Radio's English programming in the same time frame is fragmented, as a change to the Numeris' methodology in data collection resulted in new indicators. This includes changing the age of included persons from twelve to two, and the division of the CBC Radio One and CBC Radio 2 audience share indicator by three new indicators: CBC Radio One and CBC Radio 2 5-PPM Market share, CBC Radio One National Reach, and CBC Radio 2 National Reach (see Appendix B). The change has resulted in limited use for the data, as only two years of data has since been published using the revised methodology. Details also accredit the increase in overall market share and monthly reach to the audience growth of for CBC Radio One, CBC Music and numerous network programs (CBC, 2018, p. 25).

Examining the language and focus between the four documents, the transition from traditional to digital distribution methods becomes increasingly about competition in a global market. Radio-Canada was quicker to embrace more creative digital solutions for their audio market with the launch of Première PLUS. The French-only service offered a diverse range of content that updated on a monthly basis, and offered the ability for listeners to create and

customize their own playlists to suit their own needs (CBC, 2016d). Mentions of “Digital Radio” were largely absent from all four reports, with “Streaming” often reserved for mentions of audiovisual content. The use of the term “digital” is used in reference web-based content such as websites, online video streaming, and social media, as well as an umbrella term to define the combined platform of CBC/Radio-Canada. Mentions of podcasts provide the only distinct reference to digitized audio services throughout the documents, often either in reference to the success of the medium or its planned improvement in subsequent years. In its ongoing competition with international markets, the Canadian Broadcasting Corporation’s identity remains not only valuable to the domestic audience’s sense of identity, but can help establish a sense of “Canadianness” in exported products. Through digital streams of distribution, Canadian-made content has found a growing audience outside the country. The Canadian Broadcasting Corporation saw success in the international market with *Schitt’s Creek* after Netflix acquired the rights in 2017 (Landau, 2017). While radio programming does not experience the same level and method of consumption, discoverability in a global market remains a valuable asset. Rather than distribute podcast episodes exclusively through their own services, the public broadcaster makes their content available on almost every free service that supports podcasts, including Spotify, TuneIn, and iTunes. In addition, CBC/Radio-Canada’s adoption of radio streaming through smart speaker devices allow consumers to access radio broadcasts from around the world with as little as a single command. Reaching global audiences is highly beneficial to establishing the Canadian Broadcasting Corporation’s presence as a public broadcaster, but the use of digital platforms also helps to connect Canadians abroad. Internet technology allows for access to information from almost anywhere in the world, though the unique and Canadian content

provided by CBC/Radio-Canada's audio programming provides an intimate connection with their Canadian identity through live radio streams, podcasts, and music.

Interest in the shift toward digital methods of distribution has been ongoing since the early 2000s, following technological developments and a growing awareness of the disruption that internet technology would have on broadcasters globally (O'Neill, 2008, p. 30). With the Canadian Broadcasting Corporation's future invested in internet-based services, understanding the impacts caused by its transformation will assist in developing dialogue surrounding the broadcaster's evolution and help to broaden discussion of the impacts caused by technological changes to programming and audiences. As the analysed literature published by the broadcasting corporation highlights, the transformation to a digital-first environment is vital to compete against the growing number of digital entertainment and information services offered in Canada. Despite this focus, the Canadian Broadcasting Corporation offers little indication of how audio-based media as a whole will play a role in this transformation, though the progress of ICI Première and podcasting have proven to be successful outcomes in the shift toward digital technologies. Future examination of the Canadian Broadcasting Corporation's movement toward a digital-first service may be limited if the public broadcaster continues to condense statistical information and findings into the broad categories of radio, television, and digital. The adoption of new mediums (smart phone applications, voice-controlled speakers, etc.) is sometimes referenced as part of the annual reports, but no feedback on their performance is ever provided. Podcasts meanwhile continue to be referenced in part for their performance, but their role in future strategies is limited to receiving support for general improvement. Further, there is little distinction of where digital-based audio services fall in the Canadian Broadcasting Corporation's definitions of the "radio" and "media" categories, making it difficult to ascertain when changes

to either affect their digital audio products. While the available data does not draw any particular conclusions, it is likely that there will be a continued human presence to the public broadcaster's programming. Experimentation with CBC Radio 3's transformation into an automated music streaming services found the role of the radio host to be crucial to the appeal of public radio to audiences, providing a level of intimacy that comes with the medium (Fauteux, 2017, p. 355), suggesting that the future of CBC/Radio-Canada may not succeed if exclusively digital. In its adoption of digital media platforms to support or replace existing services, the public broadcaster faces the continual challenge of an ongoing digital divide in accessible internet services. Although the future of radio may seem inescapably linked to digital technology, factors which prevent a full transformation of the technology remain. Part of radio's success as a medium came from its ability to reach remote regions with access to fewer infrastructures. This level of reach is invaluable for a country as large and sparsely populated as Canada, as it reaches places where internet services may be limited or unavailable. Rural regions across Canada have limited access to internet speeds obtainable in larger city centers. Data for cell phones also continue to be restrictive due to high prices compared to plans provided across the border and limit the accessibility of online radio streams when outside of the country. Issues of unequal accessibility and affordable costs form barriers that can limit access to digital streaming services. Canada continues to struggle with equal access due to its geographic size hindering economies of scale, including telecommunications. In a report on Canada's changing media landscape, the Standing Committee on Canadian Heritage (2017) highlights several concerns that complicate the adoption of digital media services, including an income-based digital divide, limiting access to broadband Internet services for low-income households (p. 22), and the difficulty for remote communities to access reliable services (p. 23). As a publicly funded broadcasting service, there

is expectation for the Canadian Broadcasting Corporation to provide high-quality content to all Canadians. Operation of both traditional and digital services is critical to ensuring that the public broadcaster's role serves the public good of its Canadian audience, until the ongoing issue of the digital divide can be resolved.

## Appendix A: Radio-Canada's performance from 2014-2015 to 2019-2020 (CBC, 2019b, p. 26)

<b>RADIO-CANADA RESULTS</b>	Results 2014 2015	Results 2015 2016	Results 2016 2017	Results 2017 2018	Targets 2018 2019	Results 2018 2019
<b>Radio Networks</b>						
<b>ICI PREMIÈRE and ICI MUSIQUE</b> All-day audience share <sup>1</sup>	21.4%	21.8%	23.3%	24.4%	23.7%	<b>26.5%</b> ●
<b>Television</b>						
<b>ICI TÉLÉ</b> Prime-time audience share <sup>2</sup>	19.8%	19.9%	20.9%	22.7%	21.8%	<b>22.9%</b> ●
<b>ICI RDI, ICI ARTV and ICI EXPLORA</b> All-day audience share <sup>3</sup>	4.8%	4.7%	4.8%	4.7%	4.4%	<b>4.9%</b> ●
<b>Regional</b>						
<b>ICI PREMIÈRE</b> Morning show audience share <sup>1</sup>	19.2%	19.9%	18.7%	21.6%	19.5%	<b>22.8%</b> ●
<b>Téléjournal 18h</b> Average minute audience <sup>3</sup>	325 K	319 K	324 K	356 K	330 K	<b>354 K</b> ●
<b>Digital</b>						
<b>Radio-Canada Digital Offering</b> Monthly average unique visitors <sup>4</sup>	1.9 M	3.0 M	3.8 M	4.1 M	4.1 M	<b>4.8 M</b> ●
<b>Revenue<sup>5</sup></b>						
Conventional, discretionary, online	\$234 M	\$216 M	\$211 M	\$218 M	\$215 M	<b>\$218 M</b> ●

Our performance metrics are evolving as the media industry continues to undergo a digital transformation. Canadians consume media content on multiple devices (e.g., smartphones, tablets, smart TVs) from an ever-growing array of content providers. As media consumption habits change, audience measurement suppliers and the Corporation are refining methodologies and introducing new measurement technologies to ensure the accuracy and completeness of data gathered. Since some of these data are used to measure our strategic and operational performance, we may be required to make adjustments to targets and historical results to enhance comparability of the data.

● Target met or exceeded    ● Target partially met    ○ Target not met

<sup>1</sup> Source: Numeris, fall survey (diary), Francophones aged 12 years and older in Radio-Canada areas in which a Radio-Canada owned station is located, all-day audience share. Morning show: Monday-Friday, 6:00-9:00 AM.

<sup>2</sup> Source: Numeris, Portable People Meter (PPM), Francophones in Quebec, aged two years and older, ICI RADIO-CANADA TÉLÉ regular season (September to April).

<sup>3</sup> Source: Numeris, Portable People Meter (PPM), Francophones in Quebec, aged two years and older, April to March.

<sup>4</sup> Source: Comscore Media Metrix® Multi-Platform, Total Audience (desktop 2+, mobile 18+), Average of Monthly Unique Visitors from April to March, Canada. Radio-Canada digital offering: Radio-Canada.ca, ici.tou.tv, icimusique.ca, rcinet.ca, ici.artv.ca, ici.exploratv.ca and rad.ca. As of 2015-2016, this measure is multiplatform.

<sup>5</sup> Includes advertising revenue, subscription revenue and other revenue (e.g., content sales). Excludes revenue from the Olympics. Revenue for ICI ARTV is reported at 100 per cent, although Radio-Canada owned only an 85 per cent share prior to March 31, 2015. Since that date, Radio-Canada has been the sole owner of ICI ARTV.



## Appendix B: CBC Radio's performance from 2014-2015 to 2019-2020 (CBC, 2019b, p. 28)

CBC RESULTS	Results	Results	Results	Results	Targets	Results
	2014 2015	2015 2016	2016 2017	2017 2018	2018 2019	2018 2019
<b>Radio Networks</b>						
<b>CBC Radio One and CBC Music 5-PPM Market Share</b> All-day audience share in the 5-PPM markets <sup>1</sup>	- <sup>2</sup>	- <sup>2</sup>	- <sup>2</sup>	12.8%	11.3%	13.5% ●
<b>CBC Radio One National Reach</b> Monthly average national reach <sup>3</sup>	- <sup>2</sup>	- <sup>2</sup>	- <sup>2</sup>	7.7 M	7.7 M	7.7 M ●
<b>CBC Music National Reach</b> Monthly average national reach <sup>3</sup>	- <sup>2</sup>	- <sup>2</sup>	- <sup>2</sup>	4.5 M	4.5 M	4.6 M ●
<b>Television</b>						
<b>CBC Television</b> Prime-time audience share <sup>3</sup>	6.0%	5.8%	5.5%	7.6%	5.6%	5.0% ○
<b>CBC News Network</b> All-day audience share <sup>3</sup>	1.5%	1.7%	1.6%	1.4%	1.2%	1.4% ●
<b>Regional</b>						
<b>Television Local 6 PM News</b> Average minute audience <sup>3</sup>	375 K	345 K	313 K	269 K	230 K	319 K ●
<b>CBC Radio One 5-PPM Market Share</b> Morning show audience share in the 5-PPM markets <sup>1</sup>	- <sup>2</sup>	- <sup>2</sup>	- <sup>2</sup>	15.1%	14.7%	17.1% ●
<b>CBC Radio One National Reach</b> Morning show audience, monthly average national reach <sup>3</sup>	- <sup>2</sup>	- <sup>2</sup>	- <sup>2</sup>	3.5 M	3.5 M	3.6 M ●
<b>Digital</b>						
<b>CBC Digital Offering</b> Monthly average unique visitors <sup>4</sup>	10.6 M	12.4 M	14.8 M	16.1 M	15.6 M	17.4 M ●
<b>Revenue<sup>5</sup></b>						
<b>Conventional, discretionary, online</b>	\$321 M	\$260 M	\$228 M	\$295 M	\$213 M	\$212 M ●

Our performance metrics are evolving as the media industry continues to undergo a digital transformation. Canadians consume media content on multiple devices (e.g., smartphones, tablets, smart TVs) from an ever-growing array of content providers. As media consumption habits change, audience measurement suppliers and the Corporation are refining methodologies and introducing new measurement technologies to ensure the accuracy and completeness of data gathered. Since some of these data are used to measure our strategic and operational performance, we may be required to make adjustments to targets and historical results to enhance comparability of the data.

● Target met or exceeded    ● Target partially met    ○ Target not met

<sup>1</sup> Source: Numeris, Portable People Meter (PPM), persons aged two years and older, in the Toronto, Vancouver, Calgary, Edmonton and Montreal-Anglophone markets. Local Morning Shows: Monday-Friday, 6:00-8:30 AM.

<sup>2</sup> This indicator was introduced in 2016-2017 and results are available as of 2017-2018.

<sup>3</sup> Source: Numeris, Portable People Meter (PPM), persons aged two years and older.

<sup>4</sup> Source: Comscore Media Matrix® Multi-Platform, Total Audience (desktops 2+, mobile 18+), Average of Monthly Unique Visitors from April to March, Canada.

<sup>5</sup> Includes advertising revenue, subscription revenue and other revenue (e.g., content sales). Toronto 2015 Pan American Games revenue included in 2015-2016 results reflects joint English and French Services revenue. Revenue for documentary is reported at 100 per cent, although CBC/Radio-Canada owns 82 per cent of this channel. As of 2017-2018, the CBC Television regular season target includes the Olympics.

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