

CMF Consultations English & French Broadcaster Envelopes

November 6, 2025



CANADA
MEDIA FUND

FONDS DES MÉDIAS
DU CANADA

AGENDA

- ▶ **Welcome**
- ▶ **Housekeeping**
- ▶ **Land Acknowledgement**
- ▶ **Current Context**
- ▶ **Topics and Questions**

CURRENT CONTEXT

CURRENT CONTEXT – CMF’S BALANCING ACT

Balancing:

- **Stability** for legacy platforms and creating **new access** points to unlock CMF financing
- Support for **linear television** content and **interactive and emerging digital** content
- Direction of **Government of Canada** (e.g., 10/10 CAVCO points and mandated genres) and possible **CRTC** regulatory changes (“Canadian content” and elimination of “PNI”)
- **Project-by-project** financing and evolving the CMF’s funding model with new ways to support the industry (e.g., **business development**)
- Role as a **vehicle for public policy** objectives and **lever of industry** for economic impact

CURRENT CONTEXT – MOVING PARTS

- **CRTC:**
 - Decision on the definition of a “Canadian program” (*BNC CRTC 2024-288*)
- **Online Streamers:**
 - Payments from foreign online streaming services are on pause as streamers challenge the decision at the Federal Court of Appeal
- **Industry:**
 - Ongoing technological and international disruption
- **Government:**
 - Department of Canadian Heritage continuing to modernize the audiovisual industry
 - Federal Government Fall Budget – **new \$127.5M commitment**
- **CMF Demand and Revenue →**

CURRENT CONTEXT – CMF DEMAND: FUNDING

Snapshot of 2024-2025

- *Selective Programs*: Budget of \$77.3M and demand of \$295.9M
- *First-come/First-served Programs*: demand continues to outstrip supply
 - For example, English Regional Production Bonus Applicants received **63%** of their requests in 2020-2021
 - The proration has declined each year and in the Spring 2025 Round, Applicants received **34%** of their funding request

CURRENT CONTEXT – CMF DEMAND: PROGRAM ADMINISTRATION

- **Demand:** not just about how much we have to *distribute*...it's about the *cost to evaluate*
 - 2022-2023: 1,750 applications processed
 - 2023-2024: 2,100 applications processed
 - 2024-2025: 2,250 applications processed
- **CMF Administration Fee:** capped at 6% of revenue
- As our revenue declines, our 6% administration fee cap will not go as far:
 - We will not be able to evaluate files the same way
 - We will not be able to effectively sort through all the demand

CURRENT CONTEXT – CMF REVENUE

Private-side Revenue

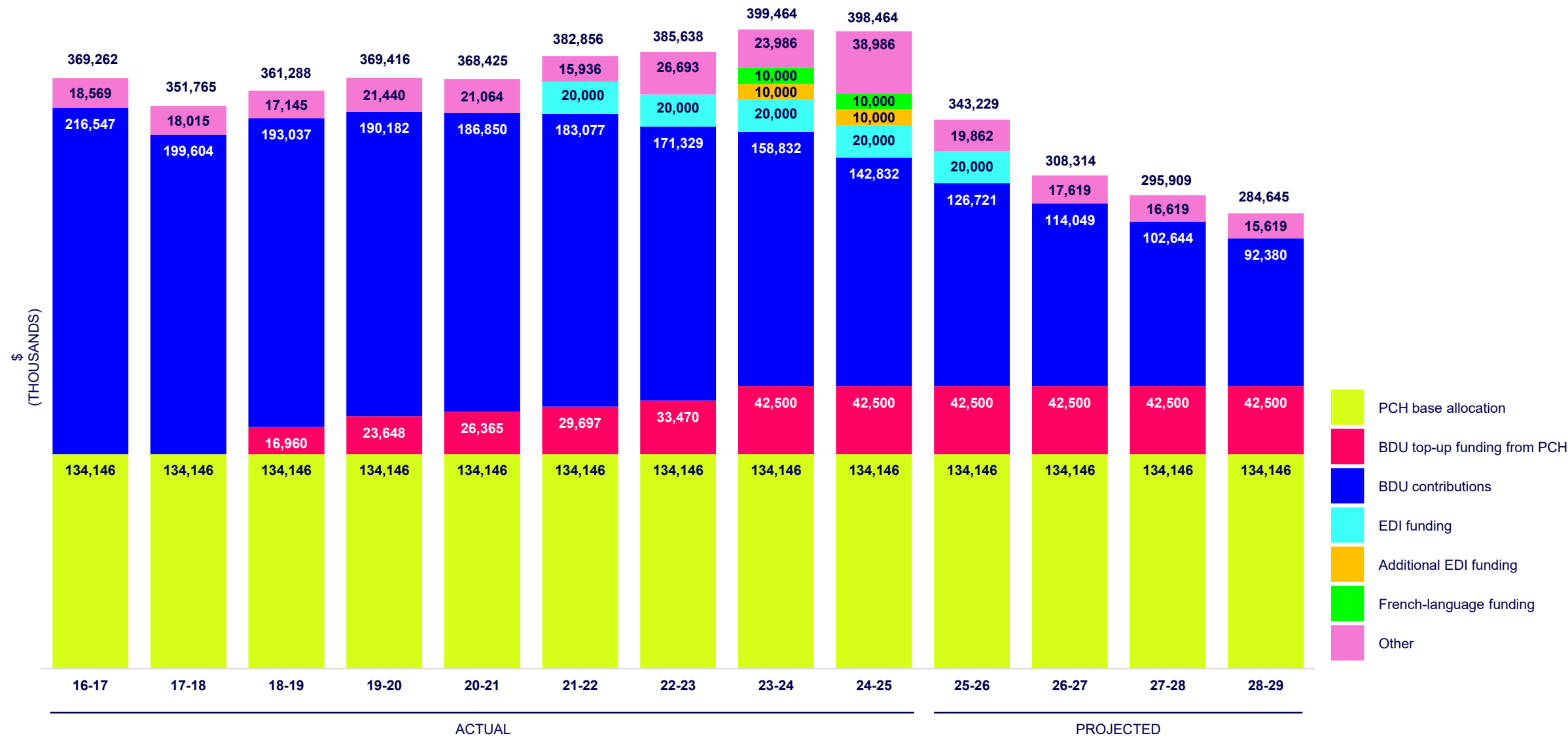
Declining BDU revenue

- Estimated at **35%** (\$121M) of CMF Content funding for 2025-2026
- For context, it was **63%** (\$230M) in 2014-2015
- BDU revenue is projected to decline by **\$35M (27%)** over next 3 years

Public-side Revenue

- Final year of Government of Canada funds designated for equity-deserving communities
- New additional **\$127.5M (\$42.5M/yr x 3 years)** commitment in November 2025 Federal Budget

CURRENT CONTEXT – CMF REVENUE



TOPIC #1 – GENDER & DIVERSITY

TOPIC #1 – GENDER & DIVERSITY

- **Gender (Key Personnel) Requirement – introduced in 2017-2018**
 - Broadcasters with Envelope Allocations over \$5M required to direct a minimum percentage of their Allocations to Eligible Projects where at least 40% of the Producer, Writer, and Director positions are held individuals that publicly identify as women
- **Diverse Community (Ownership) Factor – introduced in 2021-2022**
 - Credit for the Factor is based on the Eligible Licence Fees provided to projects from production companies that are at least 51% owned and controlled by members of a “Diverse Community” (Indigenous, Black and Racialized, 2SLGBTQ+ and Persons with disabilities)

TOPIC #1 – GENDER & DIVERSITY

- **Gender (Ownership) Factor – introduced in 2024-2025**
 - Credit for the Factor is based on the Eligible Licence Fees provided to projects from production companies that are at least 51% owned and controlled by individuals that publicly identify as women
- **Diverse Community (Key Personnel) Factor – introduced in 2024-2025**
 - Credit for this Factor is based on Eligible Licence Fees to projects where at least 40% of the Producer, Writer, and Director positions are held by members of Diverse Communities

TOPIC #1 – GENDER & DIVERSITY

ISSUES:

- **Increasing complexity**
 - Measuring Broadcasters on something they can't know or control
- **PERSONA-ID & Confidentiality**
 - As they try to have more control over who is hired on a project, Broadcasters are putting stipulations into their agreements with Producers that have the potential to violate the confidentiality and anonymity of PERSONA-ID information
- **Misrepresentation**
 - In some cases, we have been made aware of anecdotes that Broadcasters are prompting producers and creatives to self-identify as experiencing mental health challenges in order to be categorized as a “Person with a disability”

TOPIC #1 – GENDER & DIVERSITY

- How should the CMF balance incenting wider representation in projects it finances with protecting and respecting the confidentiality and anonymity of submitted demographic information?
- How can Broadcasters and Producers achieve certain requirements and compete for certain incentives if the information that will measure their success is both confidential and provided on a voluntary basis?
- Are these difficulties experienced the same way between both:
 - Broadcasters and Production Companies?
 - Production Companies and Key Personnel?
 - Broadcasters and Key Personnel?

TOPIC #2 – AUDIENCE & ENGAGEMENT

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ENGLISH

Broadcaster Groups 	Submitted Numeris results for Audience Factor 
Accessible Media	Yes
Afroglobal Corporation	No
Allarco Entertainment 2008 Inc.	No
Anthem Sports & Entertainment Corp.	No
APTN English	Yes
Bell Media - English	Yes
Blue Ant Media	Yes
CBC	Yes
Channel Zero Inc.	Yes
Corus	Yes
FEVA TV INC.	No
Hollywood Suite	Yes
Knowledge	Yes
New Tang Dynasty Television (Canada)	No
Nunavut Independent Television Network	No
OUTtv	Yes
Rogers	Yes
TELUS Communications Inc.	No
The Miracle Channel Association	No
TLN Media Group	Yes
TVO	Yes
YES TV	Yes
ZoomerMedia Inc.	Yes

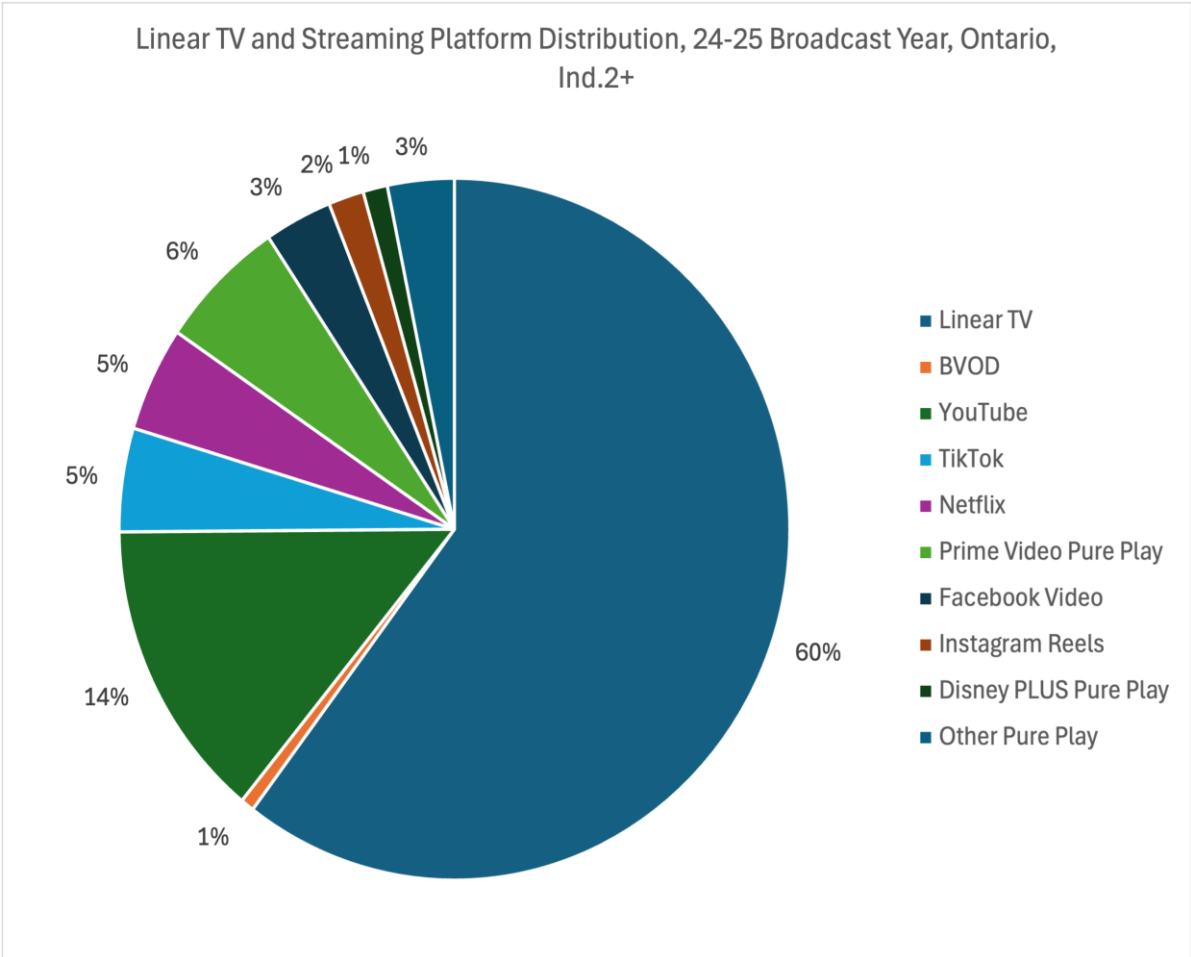
TOPIC #2 – AUDIENCE & ENGAGEMENT

FRENCH

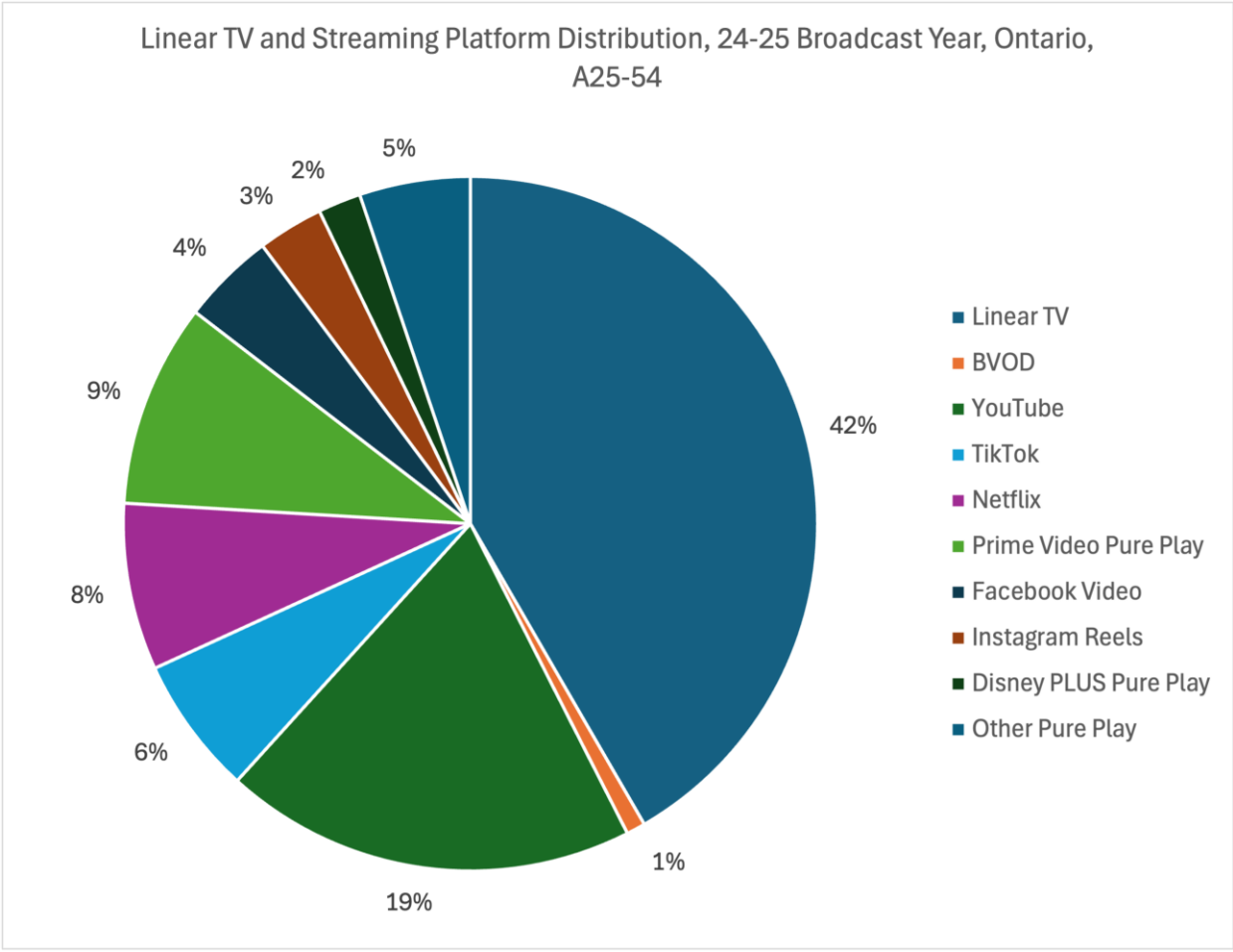
Broadcaster Groups 	Submitted Numeris results for Audience Factor 
AMI-télé	Yes
APTN Français	Yes
Bell Média - Français	Yes
Corus	Yes
Natyf	No
Savoir média	Yes
SRC	Yes
Télé Québec	Yes
TFO	Yes
TV5	Yes
TVA	Yes

TOPIC #2 – AUDIENCE & ENGAGEMENT

ENGLISH
ALL AGE GROUPS

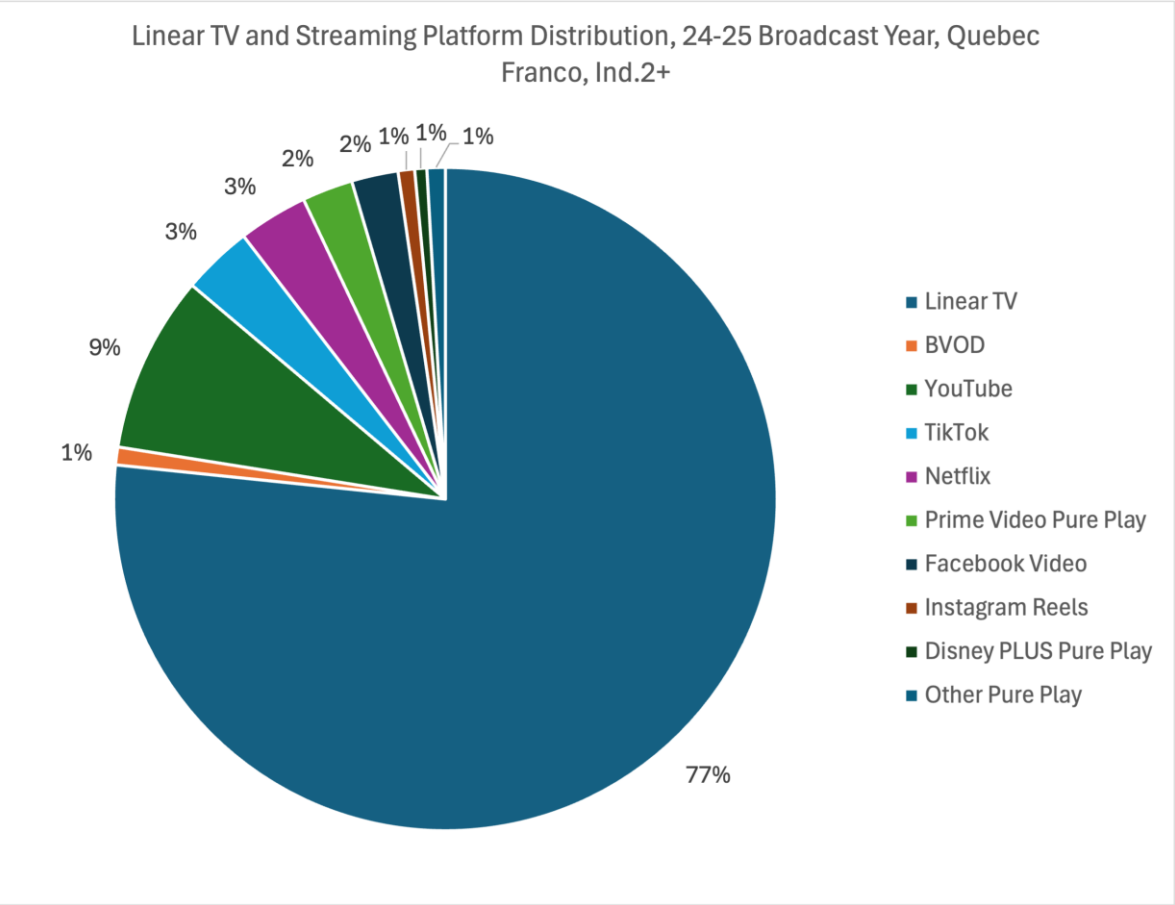


ENGLISH
25 - 54

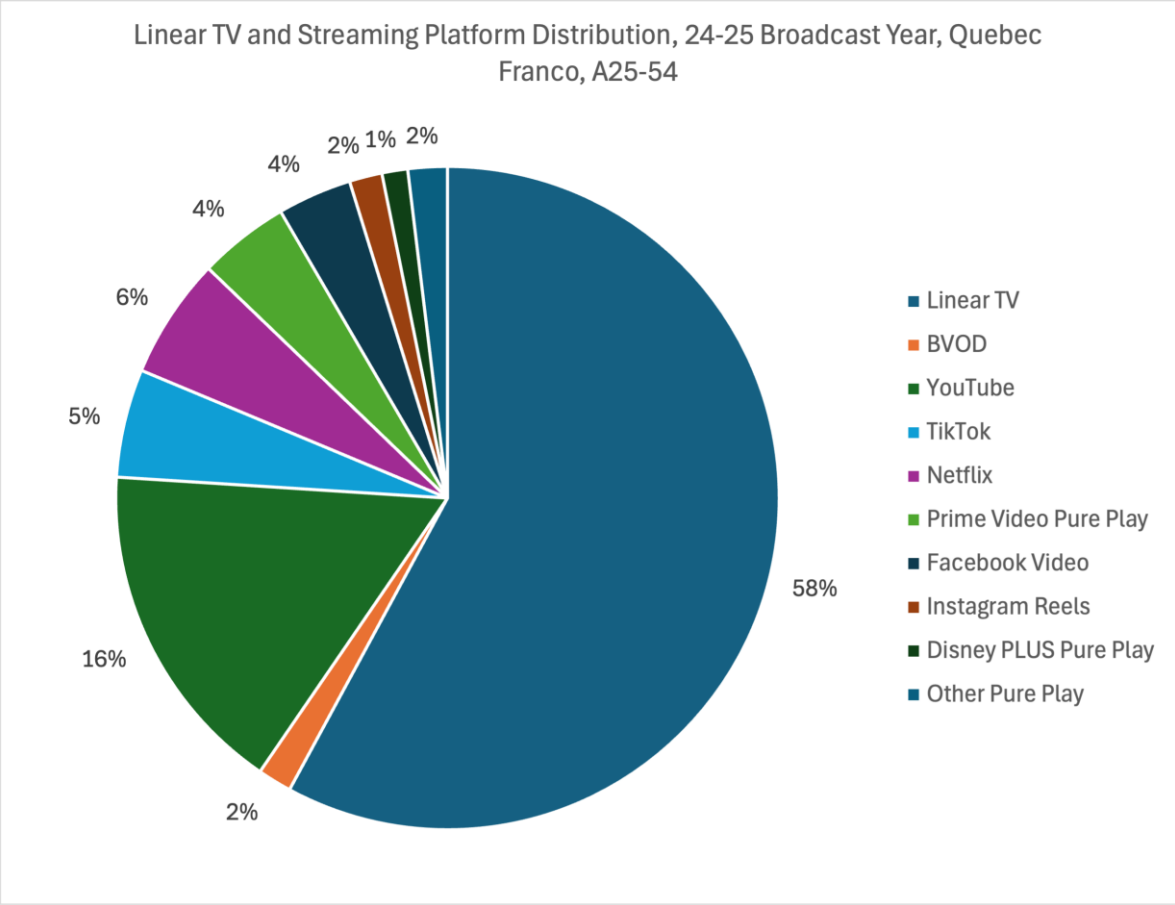


TOPIC #2 – AUDIENCE & ENGAGEMENT

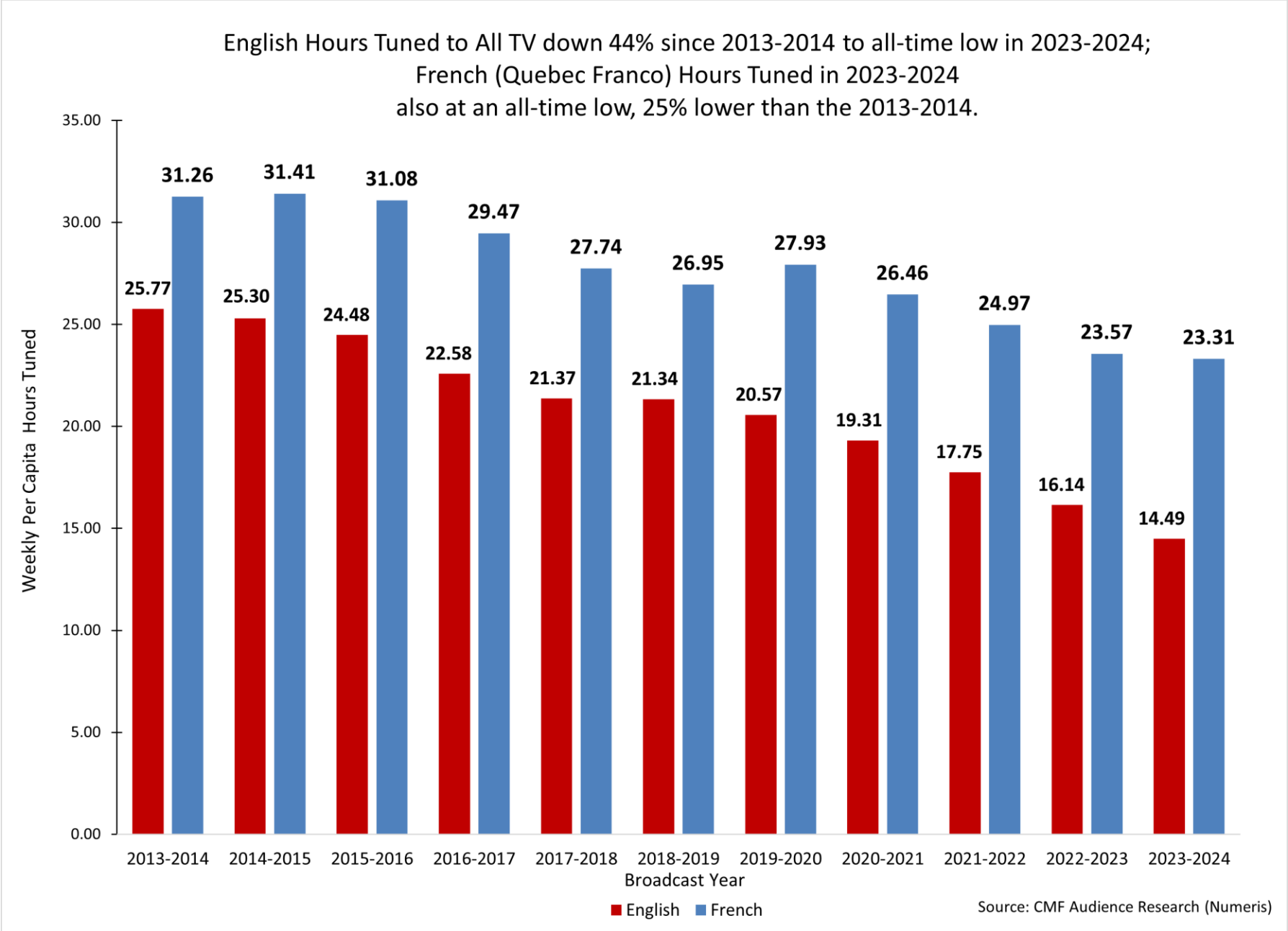
FRENCH ALL AGE GROUPS



FRENCH 25 - 54



TOPIC #2 – AUDIENCE & ENGAGEMENT



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- The CMF's mandate includes funding content that Canadians consume
- Content consumption on conventional TV continues to decline and it has become increasingly challenging to rely solely on Numeris as it captures less and less of the marketplace each year
- But there is no single recognized alternative to Numeris:
 - Independent 3rd party metric
 - Acknowledged and accepted by the entire television industry
 - That captures all the consumption on all the different digital platforms

TOPIC #2 – AUDIENCE & ENGAGEMENT

- The CMF wants to reward a broader scope of engagement with CMF-financed content
- Possible three-pronged approach includes the following new metrics:
 - **Numeris→ Video Audience Measurement (VAM):**
 - Launched in Fall 2025
 - Only Broadcaster Video on Demand (**BVOD**) captures data on project-by-project basis
 - VAM's BVOD data captures around 2% viewing of CMF-funded projects
 - **Parrot Analytics→ Demand Index:**
 - Does not capture audience views, but measures demand
 - Used as a proxy for streaming performance and digital attention by assessing search volume, social media engagement, and piracy data
 - **YouTube→ Project and Project-related content Views:**
 - Recognized as the 2nd largest platform for viewership (after conventional TV), accounting for 12.5% of all viewing in Canada

TOPIC #2 – AUDIENCE & ENGAGEMENT – NUMERIS' VAM

- ***Pros:***

- The CMF already uses the Numeris dataset and software to validate the THT submissions by Broadcasters
- Numeris is the sole provider of viewership data for Canadian Broadcasters and is widely used by the CMF, CRTC, Canadian Heritage, Broadcasters, etc.

- ***Cons:***

- Only BVOD stations (i.e., where no subscription is needed) have program-level data so this metric excludes services like Crave, illico+, etc.
- Numeris is still negotiating with some BVOD platforms to submit their program-level tagging

TOPIC #2 – AUDIENCE & ENGAGEMENT – PARROT'S DEMAND INDEX

- ***Pros:***

- Offers an independent and reliable method for assessing audience attention/engagement (not based on actual streams or audience size) without receiving viewership data from streaming platforms
- Captures a broader spectrum of audience interest and interaction by incorporating:
 - Global web search activity
 - Social media engagement
 - Peer to peer downloads and streaming sites

- ***Cons:***

- Is a proxy metric and does not actually measure viewership/audience size
- Children & Youth content generally shows less online engagement, which can result in lower relative performance compared to actual viewing metrics

TOPIC #2 – AUDIENCE & ENGAGEMENT – PARROT'S DEMAND INDEX CANADIAN MARKET

Top 20 Programs - Parrot Average Demand - English

Canadian Average Demand, 2024-2025 Broadcast Year	
Title	Average Demand
Letterkenny	24.49
Shoresy	18.17
Murdoch Mysteries	17.84
Heartland	16.95
Law & Order Toronto: Criminal Intent	15.90
Sullivan's Crossing	15.52
Hudson And Rex	15.40
This Hour Has 22 Minutes	14.38
The Trades	13.52
Son Of A Critch	13.28
Wild Cards	12.07
Children Ruin Everything	11.66
North Of North	10.58
Allegiance	10.05
Sight Unseen	9.74
Murder In A Small Town	9.57
Highway Thru Hell	9.55
Workin' Moms	9.34
Skymed	9.05
Saint-Pierre	8.66

Top 20 Programs - Parrot Average Demand - French

Canadian Average Demand, 2024-2025 Broadcast Year	
Title	Average Demand
Empathie	14.75
La Collecte	6.64
STAT	5.72
District 31	4.99
C'est Comme Ça Que Je T'aime	2.46
M'entends-tu	2.39
Les Armes	2.26
Mégantic	2.20
Les Pays D'en Haut	1.92
La Petite Et Le Vieux)	1.81
La Nuit Où Laurier Gaudreault S'est Réve	1.79
L'échappée	1.78
La Faille	1.68
Complètement Lycée	1.67
Pour Toujours, Plus Un Jour	1.62
Les Beaux Malaises 2.0	1.58
Star Académie	1.58
Lol :-)	1.55
Caméra Café	1.49
Lakay Nou	1.48

IDEA #2 – AUDIENCE & ENGAGEMENT – PARROT'S DEMAND INDEX

- **CMF Model:**

- Introducing a Parrot Envelope Factor that applied to Broadcasters' CMF projects (funded in past 5 years) ranking in **the top 20** for audience demand/interest according to Parrot Analytics
- Each project in the top 20 would be assigned a score derived from the "Parrot Demand Index". Based on each Broadcaster's performance relative to one another in this process, different credit shares are earned by each Broadcaster
- When multiple broadcasters co-fund a project, each receives full credit for the project's demand score (e.g., CBC and APTN for *North of North*)
- The model differentiates by language but not by genre, as demand levels for some genres are too low for reliable comparison

TOPIC #2 – AUDIENCE & ENGAGEMENT – PARROT’S DEMAND INDEX

Canadian Average Demand, 2024-2025 Broadcast Year	
Broadcaster	Share %
CBC	44.2%
Bell Media - English	37.1%
Rogers Media	11.3%
APTN - English	3.8%
Corus Entertainment Inc.	3.5%
Total	100.0%

Canadian Average Demand, 2024-2025 Broadcast Year	
Broadcaster	Share %
TVA	39.3%
SRC	27.8%
Bell Média - Français	26.5%
Télé-Québec	3.5%
AMI-Télé	2.8%
Total	100.00%

TOPIC #2 – AUDIENCE & ENGAGEMENT – YOUTUBE VIEWS

- ***Pros***

- YouTube is already widely used by Broadcasters to extend their audience and to reach new viewers
- In Canada, YouTube is second highest platform consumed after conventional TV (12.5% of all viewing)

- ***Cons***

- The submission and verification process to calculate each Broadcasters cumulative views would be labour intensive on both Broadcasters and the CMF
- YouTube views benefit certain genres (e.g., Children & Youth) more than others due to the volume of kids' shows on the platform and number of younger viewers
- Not all Broadcasters are directing consumers to YouTube for their content

TOPIC #2 – AUDIENCE & ENGAGEMENT – YOUTUBE VIEWS

- Broadcasters would provide a comprehensive list of YouTube videos on Broadcaster-branded channels that exclusively feature CMF-funded projects, along with the total view counts
- For verification and transparency, Broadcasters would permit the CMF to verify the view counts via an external platform without the need to share proprietary information
- Upon successful verification, the confirmed view counts would be credited to the respective broadcaster and incorporated into their Envelope allocation calculations

TOPIC #2 – AUDIENCE & ENGAGEMENT – YOUTUBE VIEWS

- Should the CMF's **calculations for YouTube views**:
 - **Limit the number of videos** allowed to be submitted (i.e., “best foot forward” approach)?
 - **Be based on entire episodes** of CMF-funded content (i.e., follow an “audience viewing” approach)?
 - **Be based on *any* content on YouTube** related to CMF-funded content (i.e., follow an “audience engagement” approach)?

TOPIC #2 – AUDIENCE & ENGAGEMENT

Broadcaster Groups	Submitted Numeris results for Audience Factor	National VAM BVOD Program Level Data	Parrot	Parrot Top 20 (24-25 BY)	YouTube
Accessible Media	Yes	No	Yes	No	Yes
Afroglobal Corporation	No	No	No	No	No
Allarco Entertainment 2008 Inc.	No	No	Yes	No	No
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TLN Media Group	Yes	No	No	No	No
TVO	Yes	No	Yes	No	Yes
YES TV	Yes	No	Yes	No	Yes
ZoomerMedia Inc.	Yes	No	Yes	No	Yes
	65%	13%	74%	22%	78%

TOPIC #2 – AUDIENCE & ENGAGEMENT

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Bell Média - Français	Yes	No	Yes	Yes	Yes
Corus	Yes	No	Yes	No	Yes
Natyf	No	No	Yes	No	Yes
Savoir média	Yes	No	Yes	No	Yes
SRC	Yes	Yes	Yes	Yes	Yes
Télé Québec	Yes	No	Yes	Yes	Yes
TFO	Yes	No	Yes	No	Yes
TV5	Yes	Yes	Yes	No	Yes
TVA	Yes	No	Yes	Yes	Yes
	91%	18%	100%	45%	100%

TOPIC #3 – OTHER CONSIDERATIONS

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Licence Fee Factor

- As the CMF starts to emphasize and rely more heavily on market forces, should the CMF also consider a Broadcaster Envelope Factor that is based on the size of the Broadcaster's licence fee relative to the Project's eligible costs? Or should the CMF consider a dollar-for-dollar credit?

International Participation Factor

- Introduced in 2024-2025, this Envelope Factor as an incentive for Broadcasters to choose projects with a commitment or confirmed agreement to exploit the project outside of Canada.
 - Given Broadcasters focus on the domestic market, should the CMF consider eliminating this Factor and focus on incenting international exploitation more in its Distributor Program?

TOPIC #3 – OTHER CONSIDERATIONS

Historic Performance Production Factor

- This Envelope Factor is based on the amount of CMF production funding historically accessed as a result of a Broadcaster's licensing of projects.
 - While this Factor has been eliminated in the English Envelopes, it remains in the French Envelopes. Should the CMF consider eliminating this Factor in order to make more room for possible new Envelope Factors (e.g., Parrot, YouTube, Licence Fee)?

Cap on Envelope Allocations

- Should the CMF consider introducing a maximum share of an overall language Envelope any one Broadcaster can earn each year (i.e., "Broadcasters cannot earn more than X% of the entire English Envelope each year")

FEEDBACK:

written responses required by December 3, 2025

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