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Telecommunications Commission

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télécommunications canadiennes

Canada

AUDIENCE AT THE CENTRE:

DISCOVERABILITY, PROMOTION, AND PROMINENCE OF CANADIAN CONTENT ACROSS THE BROADCASTING SYSTEM

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REPORT SUBMITTED BY: NORDICITY

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EXECUTIVE SUMMARY

Background, mandate, and methodology

Canada’s broadcasting ecosystem is navigating another wave of disruption as audiences and advertising migrate online; consumption fragments across services and devices; and platform architectures, increasingly driven by artificial intelligence, shape what people find. Canadian broadcasters have adapted with new offers, such as on-demand services, podcasting, and free ad-supported streaming TV (FAST) channels. At the same time, rights-holders cultivate audiences beyond traditional pipelines through social media and live events, thus making search engine optimization (SEO), including artificial intelligence–assisted SEO, an essential discoverability tool.

Historic regulatory levers (program expenditure and exhibition requirements, simultaneous substitution, carriage obligations, radio music quotas, etc.) built reliable access to Canadian content, but their effectiveness has eroded amid the rise of global, internet-delivered platforms. Discoverability now sits at the intersection of culture, technology, commerce, and governance, raising questions about who steers the “infrastructure of attention,” which stories travel, and how the value of Canadian intellectual property (IP) is captured as the CRTC modernizes the system around high-quality, diverse content, sustainability, and clear rules.

At the CRTC’s request, Nordicity examined the discoverability, promotion, and prominence of Canadian audio and audiovisual content (including sports and news) across the full content lifecycle and stakeholder spectrum. The study maps tools and practices in Canada and abroad, identifies regulatory approaches that could inform a renewed framework, and distills policy takeaways. The analysis, opinions, and strategic considerations contained herein are those of Nordicity and do not necessarily reflect the views, policies, or positions of the CRTC.

Methodologically, Nordicity combined an extensive literature review (academic, industry, policy and program documents, trade/news, CRTC transcripts and submissions) with consultations, in both English and French languages, conducted online from June 2 to August 29, 2025. Consultations included 48 semi-structured interviews and three roundtables spanning public/private broadcasters, international services, radio, funding bodies and screen/music offices, rights-holders (creators, producers, distributors), labels/publishers, unions/guilds, thought leaders, and international agencies/regulators.

Defining discoverability

A key learning of this study is that discoverability has no single, universal definition. Stakeholders frame it through their roles and the stage of the content lifecycle where their work is focused. Even from one jurisdiction to another, terms such as “discoverability” or “prominence” can refer to different concepts. In this study, discoverability means a piece of content’s capacity to be easily found in complex information environments. This definition includes both situations when audiences already know and search for this piece of content as well as when they do not yet know it and encounter it via recommendations (including word-of-mouth, engines, social media), curation, or browsing.

Discoverability can be understood as operating as two simultaneous dialogues: a human-facing one (marketing, publicity, events, word-of-mouth, etc.) and a machine-facing one (metadata, search-engine optimization, etc.). It also unfolds on two horizons: short-term moments (launch windows, zeitgeist alignment) and long-term stewardship (data maintenance, community care, catalogue). Around these mechanisms sit levers that can influence discoverability: policy and regulation, funding and incentives, education and capacity building, shared governance/standards, and industry coordination.

Practically, discoverability is not an end in and of itself; rather, it is a pathway in the audience journey toward conversion, engagement, and retention. Two co-existing consumption modes imply different levers: active (lean-forward) moments reward

precise search, storefront findability, creator follows, and clean metadata; passive (lean-back) moments depend on prominence surfaces (home rows, playlists), editorial context, and recommendation quality. Consulted streaming services argue that all use is ultimately interactive, as sessions are user-initiated and continuously shaped by signals. As such, they emphasize protecting choice and retention. Within regulatory bounds, the CRTC cannot dictate taste but can facilitate “passive” discoverability by ensuring Canadian and Indigenous works are present, findable, and fairly surfaced within services and, where relevant, device interfaces, while leaving the choice of what to watch with audiences.

Discoverability in a digital world

The digital era has reconfigured the global broadcasting landscape. Streaming continues its rapid expansion while traditional broadcasters contract. YouTube now rivals or exceeds premium streamers in engagement. Audiences move fluidly across services, devices, and social platforms. With younger users gravitating to mobile, on-demand, and short-form content, search, recommendation, and user-interface (UI) design are central to how works are found. In this algorithmic, data-driven environment, discoverability requires coordinated technology, promotion, and metadata, reinforced by policy frameworks that recognize global competition and platform concentration while upholding cultural and social objectives.

The streaming shift in the audio sector presents a stark picture: revenues hit record highs as access has democratized, but oversupply and algorithmic gatekeeping are intensifying attention scarcity. With ~120,000 new tracks uploaded daily to Spotify and consumption highly skewed to a small cohort of top artists, emerging and mid-tier creators face rising barriers. Canada nevertheless ranks among the world’s leading music exporters, even as domestic share on streaming lags regulated radio play. The result is a dual reality: global opportunity alongside structural pressures that demand better audience development as well as modernized funding and regulatory supports for discoverability in a highly competitive global environment.

Across audio and audiovisual, the attention economy reframes strategy: audience time is scarce. Competitiveness increasingly means treating IP as a portable story world and audiences as active partners. The traditional sequence has inverted: creators validate audience-IP fit early (teasers, proofs, pre-saves/watchlists) and then express the IP in formats that maximize engagement. Running audience development alongside production strengthens resilience and deal terms, launches projects into existing demand, and aligns with today's expectation for adaptable, multi-platform storytelling.

Audience choice is shaped by both active and passive modes that often blend within a single session. People frequently discover titles off-platform (social media, ads, search, word-of-mouth) and then rely on on-platform recommendations to confirm and continue. Algorithms matter but are not absolute; word-of-mouth, fandom, and zeitgeist consistently emerge as decisive.

In Canada, consumption patterns underscore the stakes: English-language domestic audiovisual content struggles for visibility relative to foreign titles, while French-language markets perform better at home but face scale limits. YouTube's reach (and its global offering) looms large across all demographics.

Content lifecycle strategies

Discoverability is not a late-stage marketing push; it is a throughline from IP conception through development, financing, production, release, and catalogue.

Stakeholders agree that the most effective strategies begin by identifying target audiences, testing concepts, and building communities that inform creative choices and packaging long before launch. A robust IP development pipeline, including strategic interventions where markets fail, raises the odds that high-potential projects surface organically in crowded environments. Roles and responsibilities in building discoverability vary by stage and stakeholder, and both direct (e.g., marketing, prominence obligations) and indirect (e.g., production funding, awards) actions can contribute.

Early market intelligence turns creative intent into testable opportunity. In audiovisual, funders and broadcasters value audience scoping, proofs of concept, and testing to shape format, tone, casting, platform fit, and launch tactics – though financing this early work is challenging. Streamers and distributors apply analytics to inform both marketing and creative structure, and some rights-holders mine YouTube and other platforms for signals to guide new projects. In audio, independents often privilege artistic vision, but artists increasingly “pilot” snippets on social platforms and live stages to gauge response. Funders are also beginning to recognize digital tools and ad spends as critical costs.

Maintaining interest is key but requires continuous engagement pre- and post-launch. In audiovisual, windowing can create conversational gaps, especially for one-off features, leaving producers with limited resources to bridge theatrical and subsequent windows. At the same time, services tend to invest most where they hold ownership. Series rely on announcements, recaps, and re-releases to re-ignite attention between seasons, with ownership and rights structure determining who stewards resurgence and catalogue value. In audio, touring and festivals remain vital, but the always-on social cadence needed to sustain fandom is demanding.

IP strategy underpins competitiveness in a global content market. In audiovisual, strong source IP along with earlier, better-financed development and audience research improve leverage to retain rights and negotiate flexible deals with services. Long-tail revenues from secondary windows and catalogue sales strengthen companies. In audio, Canada’s development and export ecosystem has propelled global success, but the biggest wins often migrate to foreign rights-holders as artists scale, raising IP retention challenges. Across both sectors, aligning development, marketing, and export readiness from the outset appears critical to the support of authentic stories that travel.

Structural dynamics shape discoverability. Foreign-owned platforms dominate access, attention, and advertising flows, intensifying competition for domestic works, even as they create global opportunities. French-language markets benefit from cultural and

policy supports but face increasing discovery gaps online while English-language broadcasters continue to confront the gravitational pull of US publicity and audience awareness. As linear declines and the historic advantages of broadcasting distribution undertakings (BDUs) wane, Canadian players increasingly market through foreign platforms, redirecting marketing (and ad-spend) abroad and pressuring local ecosystems – particularly news. Within this landscape, successful lifecycle strategies might hinge on coordinated roles, rights structures, and market supports that keep Canadian and Indigenous content visible across services and into the long tail.

Marketing and promotional tactics

Marketing and promotion are now multi-platform, always-on disciplines that help connect content with audiences. Stakeholders highlighted that effective campaigns are audience-first and content-led, sequenced from first tease to long tail, and calibrated by format, platform, and community. Stakeholders balance authentic human storytelling (e.g., press, festivals, events, community activations) with the realities of algorithmic discovery, using data to iterate across earned, owned, and paid channels.

When it comes to developing and implementing marketing plans, roles and responsibilities remain fluid. In the linear era broadcasters, carried most of the marketing load; in today’s social-first environment producers, and creators are expected to originate a richer slate of assets and activations, often without commensurate budgets. Streamers typically open marketing discussions early and share selective analytics with selected content producers, but Canadian titles still compete internally for scarce promotional resources. Across the ecosystem, diminished in-house marketing capacity, box-ticking “discoverability plans,” and single-line item marketing budgets create execution gaps that weaken campaign continuity.

Tactics have diversified with the landscape. In audiovisual, YouTube functions as both a global top-of-funnel and conversion driver, with short-forms nudging viewers toward long-form, and services repurposing assets to lift performance on their primary

platforms. Partnerships span bundling, co-commissions, and theatrical “eventizing” (including streamer originals) to build awareness. For smaller or mission-driven titles, micro-distribution trades scale for depth and durable impact. In music, live performances remain engines of discovery and fandom, while “waterfall” single releases sustain momentum ahead of albums.

Social platforms are indispensable but unpredictable. Snapchat, Instagram, TikTok, X, Reddit, and others democratize access and provide real-time feedback loops, yet organic virality rarely sustains without paid support, creative discipline, and consistent community management. Online advertising remains a powerful precision tool but demands expertise to target, measure, and optimize. Consultation revealed that influence dynamics differ by market. Quebec’s French-language concentration and star system contrasts with English Canada’s ecosystem, although even there, access to global streamers are eroding audience engagement with domestic content. Campaigns that meet audiences where they already spend time, and that leverage credible voices within each community of interest, appear the most likely to compound attention into engagement, and engagement into consumption.

National identity campaigns can amplify discoverability by attaching individual titles to a broader cultural narrative. Coordinated, bilingual initiatives that spotlight Canadian and Indigenous creators, celebrate international successes, and surface diverse regional voices could help counter default assumptions about “Canadian content” while giving audiences a clear, pride-based reason to seek it out. Industry associations advocate that – if sustained across platforms and integrated into classroom, festival, and public-space touchpoints – these campaigns could build early awareness and normalize seeking and selecting Canadian content in everyday viewing/listening.

Technology, data, and platform dynamics

Technology now sits at the core of discoverability because data is the operating language of how works are indexed, ranked, and recommended. Rather than chasing

opaque algorithms, stakeholders can improve the odds that Canadian works surface through practical, repeatable tactics: rigorous metadata hygiene, strategic packaging for curators, and iterative audience testing across the lifecycle. At the same time, the ubiquity of algorithmic decision-making may elevate the value of human curation (local cultural expertise, editorial judgment, and context) to counter gaps in purely data-driven systems and better serve regional, Indigenous, and niche communities.

Platform and device layers strongly shape discovery. Pre-installed apps, remote-control buttons, and connected-TV home screens determine which services (and therefore catalogues) audiences encounter first. Where leading foreign services are ubiquitous on devices, Canadian services often require extra steps to find and install, which introduces friction that suppresses awareness and usage. Within services, a blend of personalization and editorialization guides choice: continuously trained recommendation models ingest thousands of signals while local programming teams create shelves, collections, and launch spotlights to surface Canadian and Indigenous titles. This intersection may be where prominence is won or lost.

Metadata is the connective tissue that makes content legible to both people and machines, and also underpins fair remuneration. Three layers matter: descriptive (title, creators, languages, synopsis, accessibility tags); ownership/rights (chain of title, identifiers, royalty pathways); and recommendation/enrichment (mood, micro-genre). Building a standards-driven, publicly governed metadata backbone, aligned with international schemas, and complemented by training and toolkits, would position Canadian works to be indexed correctly in search, surfaced fairly in recommendations, and paid accurately. As AI systems increasingly learn from both metadata and content itself, treating cultural metadata as shared infrastructure becomes a strategic requirement for discoverability, trust, and Canadian data sovereignty.

Regulatory levers

Across comparable jurisdictions, two broad philosophies emerge. The EU's Audiovisual Media Services Directive (AVMSD) sets a coordinated floor based on catalogue share for European works and possibilities for prominence, augmented by newer frameworks that push transparency and user control. Member states then tune the mix: France layers high catalogue quotas, concrete UI-level prominence, and sizable investment obligations; Germany operationalizes "public value" to make key services easy to find on devices and interfaces; Ireland favours flexible, principles-based oversight; and the UK remains largely market-led but is moving toward a connected-TV prominence code. Australia is introducing a prescriptive device-level "must carry" prominence regime for free-to-air/Broadcaster Video on Demand (BVOD) apps from 2026, paired with existing linear quotas and points systems.

Outside the regulatory track, South Korea shows a different route: light broadcast rules plus a heavy, long-running stack of promotion, export, skills, infrastructure, financing, and IP enforcement that collectively drive discoverability and global demand. The practical takeaways for Canada are to balance presence/prominence obligations with flexibility, build device/UI-layer solutions, improve data sharing and measurement, and pair any rules with strong non-regulatory levers so Canadian works can surface at home and travel abroad.

In Canada, many stakeholders feel **legacy inputs like Canadian Programming Expenditures (CPE) and Programs of National Interest (PNI) spend and exhibition quotas helped build Canada's production capacity, but do not map neatly onto today's audience-demand ecosystem.** Views diverge on how to adapt: some broadcasters favour more flexible, outcomes-oriented incentives (e.g., eligibility for marketing spend), while some creators and associations argue firmer obligations are still needed to counter market dynamics that disadvantage local content. Streamers, for their part, caution that prescriptive quotas or meddling with recommendation systems may backfire and instead press for service-specific pathways.

Measurement and data access surfaced as both an opportunity and a friction point.

Broadcasters and streamers already optimize against detailed audience signals, but producers see little standardized performance data (except when a piece of content is supported by a specific broadcaster or streamer). Lack of publicly available standardized data limits producers' ability to iterate, finance, and plan. Several participants suggested shifting regulatory attention toward transparent reporting on a small set of outcomes while letting services choose tools paired with baselines for marketing eligibility so discoverability is resourced across the lifecycle. Sector-specific issues complicate the picture: radio's Canadian content rules (Music, Artist, Performance, and Lyrics, or MAPL) can clash with modern, collaborative music making; kids' content faces strict advertising limits and platform policies (limiting access to financing on digital-first platforms); and news organizations confront platform distribution risks and eroding ad markets. In most cases, stakeholders emphasized that discoverability interventions likely work best when they align incentives with how audiences actually choose, without prescribing algorithm design.

Quebec illustrates a more coordinated approach that blends policy, infrastructure, and market practice. Québec's Digital Cultural Plan, initiatives like Métamusique, the in-development Panoscope, and community platforms such as MUSIQC aim to strengthen the underlying data layer and human curation for French-language works. Québec Bill 109 proposes device/interface-level access rules and definitional powers around "original French-language cultural content," signalling a rights-based framing of discoverability, while leaving room for substitute measures via agreements.

The broader takeaway is cautious but clear: regulatory levers can set expectations, enable shared infrastructure, and require comparable reporting, but durable gains in discoverability will hinge on coordinated, lifecycle marketing capacity and service-specific routes to demonstrable outcomes.

Indigenous markets

Indigenous creators and broadcasters face steeper discoverability barriers:

shrinking distribution windows, scarce marketing funds, underrepresentation in decision-making roles, and uneven access to funding, infrastructure, and mainstream platforms. With little First Nations, Métis, and Inuit content visible on major foreign streamers, many rights-holders are building parallel routes to audiences such as FAST channels; YouTube and social platforms to surface catalogue; and direct, community-led circulation – touring films to Indigenous communities and rural hubs, self-distribution, and local screening events – despite the time and cost required.

Measuring “success” in this context must extend beyond conventional key performance indicators (KPIs).

For Indigenous content, impact includes language preservation, cultural affirmation, and sovereignty over storytelling. Broadcasters such as APTN often prioritize projects for their cultural relevance and role in revitalizing critically endangered languages, recognizing that durable visibility is as much about strengthening communities and shifting narratives as it is about view counts or commercial returns.

Diversity and discoverability

Discoverability pathways differ by language, region, culture, and identity. As such, equity-deserving creators need more than visibility: they need fair access to audiences, resources, and opportunities. Participants stressed that effective strategies are locally grounded and community-led: word-of-mouth, cultural hubs, and grassroots circuits often outperform top-down campaigns. Initiatives that pair capacity (skills, metadata, community management) with audience-first planning help close gaps, but support should recognize that success may be measured in cultural relevance and durable engagement, not just scale.

Immigrant and diaspora communities create powerful cross-border bridges for Canadian works. Early habit-building among newcomers, especially youth, can anchor Canadian

content in everyday media consumption, while international co-productions and bi-national talent could unlock existing star systems abroad and pull audiences to Canadian platforms and content. Industry associations and creators believe that, done thoughtfully, these approaches grow fandom at home and overseas, aligning domestic inclusion with export potential and making Canadian content easier to find for the “right” audiences, not only the largest ones.

Defining success

Defining success in discoverability is plural and contextual. Stakeholders across the system pursue different but overlapping outcomes that span market metrics and cultural objectives, alongside personal/creative milestones. In a landscape where both domestic and global reach matter, services optimize on- and off-platform funnels; creators focus on getting work seen, retaining IP, and building sustainable careers; and funders and regulators look to balance cultural prominence with consumption and industry health. Measuring this remains challenging, but emerging tools and a development of standard KPIs would enable fair participation tracking and continuous improvement for all stakeholders. Crucially, success should not default to volume alone: it must also reflect whether the right audiences are finding, choosing, and meaningfully engaging with Canadian and Indigenous content.

Nine considerations for a Canadian policy and industry discoverability framework

Based on results of the consultation, learnings from other jurisdictions, and forward-looking sector signals, Nordicity identified nine strategic elements for the CRTC and stakeholders across the broadcasting ecosystem to consider as work continues to lay the foundations for a robust Canadian discoverability framework. The strategic considerations presented below are those of Nordicity alone and do not necessarily reflect the views, policies, or positions of the CRTC.

- 1. Accelerate a sector-wide mindset shift from output-first to audience-first.**

The core finding of this study is a paradigm shift: from “make to make” to “make to connect/engage.” Sustainable growth for Canadian content companies and creators depends on designing for markets (domestic and international) rather than assuming that production alone fulfils the policy brief. This reframing puts the audience at the centre of policy and practice when discussing content discoverability. Audience-building capacity is core to successful content development, production, and distribution – not a nice-to-have add-on.

Historic levers that incentivize investment in Canadian content production, presence, and prominence in the broadcasting system remain necessary but are no longer sufficient and require adaptation for the digital space, which intrinsically brings global competition for audience attention within the Canadian broadcasting system. Creators and rights-holders must pivot from making content for services to making and selling IP with services and partners. Practically, an audience-first mindset means validating audience interest-IP fit and long-term financial opportunity early in the development phase. It also means treating export readiness as a design constraint, not an afterthought. None of this displaces cultural objectives; it operationalizes them. Canadian stories reach more Canadians, and the world, when they are built to compete for attention. What Canadians make for Canadian audiences can and should succeed globally.

The considerations that follow translate the audience-first mindset into potential actions that could support not only the production of content, but also development of content that audiences are likely to choose, complete, and return to.

2. Achieve Canadian policy objectives and global success through Canadian ownership and control of IP and content delivery services.

In the audiovisual industry, the prevailing financing-in-exchange-for-rights approach is essentially a fee-for-service model that rarely leaves domestic companies with any control of the IP. This model forfeits the long tail: the ability to build franchises, re-

license, adapt across formats, and compound audience (thus value) over time. The audio sector faces a parallel challenge: Canadian artists, producers, composers, and engineers are global calibre, yet the independent ecosystem struggles to retain both talent and rights. As a result, much of the upside accrues elsewhere even when the spark starts in Canada.

Canadian ownership of content is important in terms of ensuring the long-term sustainability of Canadian content creation companies and of creators' careers. Canadian ownership and control of the services distributing content also play a role in enhancing the discoverability of Canadian content. These services in fact shape the commercial story arc around a work, reflecting a Canadian perspective. However, while Canada has a few audiovisual players with the scale to field competitive services, music has found it far harder to launch and grow compelling alternatives. In a galaxy of apps and interfaces, even the best Canadian alternatives struggle to be found, making access and prominence on devices a policy question, not just a marketing problem.

A modernized discoverability framework for the broadcasting sector might include measures relative to both Canadian rights retention and front-door access via online services and devices.

With regard to Canadian rights retention, Canadian companies (and creators) would have a vested interest and a share in the performance of the content. The expertise and financial investment required to market content as well as the access to audience data and financial return would be shared by both producers of content and the platforms distributing that content and would contribute to develop Canadian companies' (and creators') understanding of global markets.

In terms of online services and devices, a modernized broadcast system would consider easy access to Canadian-owned/controlled services across connected devices. Several

jurisdictions are exploring device-level prominence frameworks and Canada could evaluate similar approaches suited to its markets and languages.

Financing must reinforce this ownership logic. Public funds, tax credits, and levy-based programs should recognize commercialization and rights retention as value. This vision might mean better integrating audience development into production budgets and rewarding projects and companies that retain Canadian IP and demonstrate audience traction.

3. Leverage the contribution of all components of the *Broadcasting Act* to enhance Canadian content success at home and abroad.

Canadian private and public broadcasters have long operated inside a regulated system designed to advance both economic and cultural objectives. Global streaming services, by contrast, are optimized for scale in largely unregulated markets, so their default commercial logic does not inherently prioritize Canadian stories or diverse voices, unless – or until – audience demand for such content is demonstrated.

Yet despite these different origins, the business models for broadcasters and streamers are converging: advertising and subscription now underpin both models, and bundling is common (streamer-with-streamer and, increasingly, streamer-with-broadcaster). In this interconnected market, a one-size-fits-all approach risks missing how each service can best contribute to enhance the promotion, prominence, and discoverability of Canadian content. When the ultimate goal is discoverability of Canadian IP and its creators, then flexibility means ensuring each investor, whether broadcaster or foreign streaming service, contributes toward improving visibility of that content using the mechanisms inherent in their business model.

Various avenues could be explored to design more flexible conditions of service, such as focusing on an outcomes-based, case-by-case approach that would play to the strengths

of various distribution platforms. Rather than prescribing identical inputs, service-specific requirements could align contributions with where each actor has real leverage through a transparent performance framework. The challenge would be to identify where incremental effort will make the biggest difference so that policy objectives are achieved across the ecosystem rather than within a series of silos.

A flexible approach requires clarity and accountability to ensure all components of the broadcasting system contribute to ensuring the central tenets of the *Broadcasting Act* are met. Public documentation of indicators of success with annual public reporting, comparable disclosures, and periodic reviews would allow for corrective action in the event of under-performance.

4. Define relevant indicators of success; regulate measurement and reporting; focus on improvements; adjust and correct.

An effective discoverability measurement framework for Canadian content would be guided by the cultural policy imperatives expressed in the *Broadcasting Act* while recognizing the opportunity to leverage the various components of the broadcasting system. While the definition of “success” varies by role, market, and community, a discoverability framework could focus on a small set of system-wide indicators while using service-specific pathways to achieve them.

Practically, a potential discoverability performance framework could organize indicators into four linked layers: presence (catalogue share – is Canadian content there?); promotional investment (spend in content and audience development – are audiences being invited?); prominence (app availability index, share of impressions – is it surfaced?); and consumption (impressions-to-clicks, starts, completions, repeats, saves/follows – did people choose and stay?).

In a global, algorithmically-mediated marketplace, flexibility is essential. Policy considerations could include regulating outcomes and transparency, not the specific workings of proprietary resources – especially for prominence, where dictating recommendation engine design would intrude on business models and raise competition and privacy concerns. Focusing efforts on outcomes could give services the latitude to choose tools, provided they report comparable metrics and demonstrate improvement for Canadian content. In this policy scenario, the Commission’s role would be to work with services to identify how each can best contribute to enhance the visibility and success of Canadian content, set the yardsticks, require credible reporting, and trigger corrective action when results persistently fall short. To make this approach workable, clear reporting rules would be required from all relevant services, with methodologies that can be audited. Given today’s data gaps (i.e., limited data on prominence and performance of Canadian content), a learn-and-scale approach is advisable: establish baselines, focus on measurable improvements over fixed quotas, and learn which actions move the needle for which audiences on which services.

5. Incentivize strategic marketing investment with measurable impacts and data access throughout the lifecycle.

Digital technology has handed control of content selection to audiences: virtually thousands of titles, of any type, on any subject, in any language, for any age are available on any screen, at any time. In this environment, loyalty builds around titles, creators, and themes rather than around specific services. This shift in behaviour stretches the marketing task, requiring larger, smarter, and longer-term investment to sustain interest from early development through release and into catalogue.

Currently, in Canada, support for the marketing and promotion of content represents a relatively small portion of overall investment in audio and audiovisual. A practical policy response to current and emerging business models would see audience development as an eligible and incentivized spend class across the content lifecycle.

Public support for content development, production, and marketing should be conditioned by robust, evidence-based engagement plans from development through production, launch, and catalogue phases. As broadcasters and streaming services benefit from this public investment when they licence original or catalogue shows as well as contract production or sales deals with producers, their investment should also be subject to robust, clear, transparent reporting.

Canada's existing content creation funding and promotion bodies remain essential catalysts in the content creation ecosystem. Continued modernization of mandates, policies, programs, and tools to reflect current market realities and financing structures would improve the potential of Canadian content to succeed locally and internationally. Telefilm, the CMF, the NFB, Musicaction, FACTOR, the Community Radio Fund, and Independent Certified Funds as well as provincial agencies and export offices can continue to be fundamental mechanisms of Canadian creativity and discoverability.

6. Commit more resources to metadata infrastructure.

This research confirms that data – its quantity and its quality – is foundational to discoverability, promotion, and prominence. Creators and companies need data to develop competitive IP, demonstrate audience traction, and analyze title and content performance. Services need data to surface the right works to the right audiences. Metadata is the connective tissue: it preserves data quality from one link in the lifecycle to the next and provides the shared language that makes content legible to machines. Metadata matters in terms of two key issues: findability/readability and value flows.

A discoverability policy and measurement framework should consider investment in public metadata infrastructure at the national level. To ensure that truth and provenance remain under domestic stewardship, especially as online information increasingly transits through foreign AI systems trained on (unverified) internet-scale data, Canada needs independent, interoperable registries and services for identifiers and

descriptive/enrichment data. Moreover, the framework should integrate clarification and confirmation of required data-hygiene expectations across the content creation lifecycle. More resources should be allocated to build capacity and ensure every Canadian work is compliant with standards-based metadata throughout the content creation lifecycle. This approach would require collective national initiatives and alignment with international standards.

In short, discoverability and fair compensation depend on the same backbone: a well-resourced, standards-driven metadata infrastructure that Canada builds, maintains, owns, and governs.

7. Build shared responsibility and collaboration.

A central lesson of this study is that the content lifecycle is not a sequence of discrete windows; it is a continuous flow. Discoverability success therefore requires ongoing dialogue – one with audiences as they encounter, sample, and return to works, and another, equally important, among the partners who guide content through development, financing, production, marketing, distribution, and catalogue. The objective is to maximize impact at the multiple moments when audiences make choices. This objective cannot be achieved by any single actor; it depends on the accumulation of complementary expertise, perspectives, and assets across the ecosystem.

Because discoverability is a shared responsibility, it also needs shared governance. A static, one-time regulatory fix will not resolve a dynamic, multi-actor, technology and audience behaviour-driven, constantly evolving challenge. A nationally coordinated effort is required to bring together key public entities (CRTC; Canadian Heritage; Innovation, Science, and Economic Development; Global Affairs), national and provincial funding bodies and agencies, industry associations, Canadian companies, and foreign services operating in Canada to establish a standing forum to surface barriers, test collaborative solutions, and align policy and market practices over time.

8. Support capacity-building across the sector.

Discoverability is multifaceted and easy to misdiagnose from any single vantage point. To be effective, a national discoverability performance framework must consider the capacity of the entire ecosystem to address challenges and seize new opportunities. This framework might consider sector-wide literacy, especially among Canadian-content small- and medium-sized enterprises (SMEs) that struggle to access and retain the specialized talent and resources associated audience research, marketing, and promotion required to compete.

Capacity-building could target skills and roles that move the needle: release planning, creative marketing and community management, metadata hygiene and SEO, packaging for recommenders, and performance analytics. Programs could pair training with on-the-job integration, supporting SMEs to recruit and retain community managers, metadata/SEO specialists, and data/AI practitioners.

This skills agenda is inseparable from business acumen. As companies shift from production to commercialization, training must include pricing and rights strategy, data-informed greenlight practices, and the translation of audience evidence into financing and distribution terms.

Capacity-development delivery should leverage Canada's existing and robust industry service organizations, focusing on industry associations to lead on-the-ground delivery in collaboration with funding agencies and post-secondary institutions. These efforts should include the establishment and/or reinforcement of bilingual centres of expertise, including regional hubs.

9. Consolidate efforts with strategic national campaigns.

Canada is currently experiencing heightened geopolitical frictions with the US. This context has prompted many Canadians to engage with and celebrate Canadian-made and -owned audiovisual and audio content as part of a broader shift toward choosing Canadian products. This unique period presents an opportunity for broad-based awareness campaigns in English- and French-language markets that highlight Canadian and Indigenous content, including equity-deserving communities, and international achievements.

Coordinated national campaigns should form part of the Canadian content discoverability framework. Whether building on the current geopolitical momentum or aligning with other timely narratives, collective initiatives can materially increase awareness of Canadian content domestically and internationally.

Beyond general promotion of Canadian content, targeted initiatives are warranted. For instance, appreciation and awareness begins with kids, families, and the K-12 education systems in each province and territory. Similarly, there is untapped potential to establish consumption habits and provide refreshed cultural reference points for newcomers by promoting both classic Canadian works and new voices across regions, communities, and languages.

As Canadian content strengthens its position globally, more coordinated action in export markets is advisable. International campaigns can draw on lessons from jurisdictions that position their content industries alongside sectors such as tourism, education, or fashion. Canada has many stories to tell, and many more to showcase and discover in person.

1. INTRODUCTION

1.1 Background

Canada's broadcasting ecosystem is at another crossroads in a near-continuous series of disruptions that has characterized the past couple of decades. Canadians have access to a wide range of types of audio and audiovisual content from around the world within the Canadian broadcasting system. A broad set of forces is reshaping business models and audience behaviour globally. The sustained shift of audiences and advertising to online platforms combined with fragmentation and "echo-chamber" engagement, as well as the constant evolution of consumption habits across proliferating digital services and devices, are all influencing new business and marketing models.

Canadian broadcasting undertakings continue to adapt and embrace digital and audience transformation. In today's audience demand-driven marketplace, public, private, and educational broadcasters provide on-demand streaming services (CBC Gem, ICI TOU.TV, Crave, illico+, APTN Lumi). Radio programming is streamed and increasingly repackaged as podcasts. Broadcasters are also experimenting with free ad-supported streaming TV (FAST) channels, such as CBC's channels built around long-running hits such as *Murdoch Mysteries* and *Heartland*.

The distribution pipeline is also widening: Canadian news services now live-stream on YouTube and dozens of digital platforms, and portfolios of specialized FAST channels on connected TVs (Roku, Pluto TV, Samsung TV Plus, LG Channels, Plex, etc.) offer economical reach and new ad inventory. At the same time, rights-holders and producers are cultivating audiences outside traditional pipelines, leveraging social media, live performance, and targeted cinema exhibition. In this complex, multifaceted, and competitive content environment, search-engine optimization (SEO) and, increasingly, AI-assisted SEO, are becoming basic tools to maintain visibility in algorithmic environments.

These shifts sharpen a central policy question: how can the discoverability and prominence of Canadian works be enhanced amid global competition and platform-level concentration? A purely technological or purely marketing response is unlikely to suffice. Accordingly, several international jurisdictions (notably the EU, UK, and Australia) have updated frameworks to incentivize showcasing local content, including exhibition requirements and prominence obligations for on-demand services. For Canada, these regulatory explorations offer a useful reference as the Canadian Radio-television and Telecommunications Commission (CRTC) continues to modernize the *Broadcasting Act*.

This modernization of the Canadian broadcasting system is anchored in the CRTC's plan built on three themes: high-quality Canadian content, a sustainable broadcasting system, and clear, predictable rules. The Commission has long recognized discoverability as a challenge (e.g., *Broadcasting Regulatory Policy 2015-86*; *Broadcasting Decision 2022-76*). Ongoing consultations, including *Broadcasting Notice of Consultation 2024-288* (Canadian content visibility/export potential) and *2025-2* (Market dynamics across programming, distribution, and online), reflect the urgency of ensuring Canadians can continue to find Canadian and Indigenous voices across platforms, while enabling Canadian and Indigenous services and creators to reach audiences effectively.

For decades, rules governing prominence and discoverability of Canadian content – minimum program expenditures, exhibition quotas, and carriage requirements – have been core tools of Canada's broadcasting regulation, providing Canadians with access to Canadian programs and music. Canadian Programming Expenditures (CPE) requirements along with Programs of National Interest (PNI) have ensured Canadian audiences had access to a wide range of independent Canadian audio and audiovisual content as well as the opportunity to create that content. Simultaneous substitution (i.e., replacing US ads with Canadian ads on identical programs) helped keep advertising dollars in the Canadian system, contributing to underwriting domestic news and entertainment. Carriage obligations ensured universal access to local stations and services of exceptional public interest, such as APTN, CPAC, and AMI, building reliable audiences for Canadian content. In radio, Canadian-content music quotas have, since the

1970s, ensured some visibility for Canadian music. Commercial stations must ensure at least 35% of their popular music each week is Canadian (determined by the CRTC's Music, Artist, Performance, and Lyrics [MAPL] system). In French-language markets, stations must also devote at least 65% of their weekly popular vocal music to French-language selections, reinforcing discoverability for Francophone artists.

Over the past decade, however, the proliferation of global internet-delivered platforms has weakened the effectiveness of the tools within the Commission's historical jurisdiction. The policy importance of discoverability has not diminished. If anything, Canadians increasingly need trusted pathways to Canadian stories in a vast global ocean of content (and misinformation).

Discoverability of audio and audiovisual content sits at the crossroads of culture, technology, commerce, politics, and national sovereignty. It is shaped by platform architectures and AI-driven interfaces, by data asymmetries and global capital flows, by domestic policy choices and international norms, and by the cultural priorities of a country with a diverse population, including Indigenous rights and official-language realities. The visibility of creative work, and who it reaches, now depends as much on metadata standards and recommendation design as on creative excellence and marketing campaign craft. In this environment, debates about visibility also raise questions about who governs the infrastructure of attention, whose stories travel, and how the economic value of Canadian intellectual property (IP) is captured. Any path forward must therefore acknowledge discoverability as a system-level challenge, where cultural objectives, technical interoperability, market incentives, and public-interest governance all intersect.

1.2 Mandate and scope

At the request of the CRTC, Nordicity has conducted this study on the discoverability, promotion, and prominence of Canadian audio and audiovisual content across the

broadcasting system. In the context of this study, audio and audiovisual content also include sports and news.

The study will form part of the public record for upcoming proceedings implementing the modernized framework under the *Online Streaming Act*. The study examines business strategies and practices across the spectrum of media and industry stakeholders and content lifecycle alongside regulatory approaches related to discoverability for audio and audiovisual content. Its overarching goals are to:

- Map tools and practices used in Canada and internationally to make content discoverable, prominent, and marketable.
- Identify regulatory approaches used in other jurisdictions that could inform Canada’s renewed framework, accounting for legislative differences.
- Provide key policy takeaways on practices most likely to help Canadians find the content they want, for the Commission’s consideration and potential inclusion in the public record.

While central to the broader policy context and the specific question of discoverability, this study does not define “Canadian content” (CanCon); that topic is being examined in other CRTC processes.

The analyses, opinions, and strategic considerations contained herein are those of Nordicity alone and do not necessarily reflect the views, policies, or positions of the CRTC. While the CRTC commissioned this work, the report is independent and reflects the authors’ professional judgment.

1.3 Research questions

- **Tools & mechanisms:** What tools, mechanisms, and strategies are, or could be, used to maximize the impact of each audience contact point across the content lifecycle?

- **Implementation & evaluation:** How are these tools implemented and how is their success evaluated?
- **Roles & accountability:** Who (organizations/actors) is responsible for implementing and monitoring these tools?
- **Audience behaviour:** How are Canadian audiences interacting with audio and audiovisual content today – how do they find, access, and consume it?
- **Emerging trends:** What trends should future-proof discoverability strategies consider?
- **Data & insight use:** How do stakeholders use audience data to strengthen relationships with consumers, foster discoverability, and assess impact?
- **Diverse markets:** To what extent are the challenges of discoverability, promotion, and prominence exacerbated in Canada’s diverse markets?

1.4 Methodology

Literature review

Nordicity conducted an extensive literature review to ground this report in evidence and current practice, and provide concrete examples of trends, tactics, and approaches. The review encompassed academic papers, industry reports, relevant trade and news articles, and public policies and program documents as well as CRTC hearing transcripts and stakeholder submissions. This breadth of sources ensured a rigorous, balanced understanding of discoverability, promotion, and prominence across Canada and the global broadcasting ecosystem.

A complete bibliography is available in Section 11.

Consultation

Participant selection and engagement

In collaboration with the CRTC, Nordicity developed a potential participant list that reflected the plurality of interested parties and the diversity of perspectives inherent to Canadian markets. Stakeholders included public and private Canadian broadcasters

(including their streaming services), audio and audiovisual international streaming services, public and private Canadian radio services, funding bodies and screen/music offices, industry associations and rights-holders (creators, producers, and distributors), unions and guilds, thought leaders/researchers, and international agencies and regulators.

Consultation was conducted online between June 2 and August 29, 2025. The program comprised 48 semi-structured interviews (45–60 minutes each) and three 90-minute roundtables.

Interviews and roundtables were conducted in English and/or French, depending on participant preference, with bilingual materials provided to participants in advance (study objectives, key themes, and research questions).

Interview participants and number of sessions held:

- Funding bodies, public agencies, and screen and music offices – 11 interviews
- Media and discoverability thought leaders, academic researchers – 6 interviews
- Canadian audio and audiovisual broadcasters, groups, and networks – 11 interviews
- International streaming services and associations – 8 interviews
- Audiovisual rights holders, producers, and distributors; audio labels and publishers – 3 interviews
- Unions, guilds, and industry associations - 4 interviews
- International regulators and content promotion agencies – 5 interviews

Roundtable participants and number of sessions held:

- English-language audiovisual producers, creators, and industry associations – 1 session

- French-language audiovisual producers, creators, and industry associations – 1 session
- English-language audio labels, creators, and industry associations – 1 session

Confidentiality and ethics

Conversations were confidential and designed to elicit candid, experience-based perspectives on what is working, what is not, and where the practical opportunities lie. Findings are reported in aggregate and not attributed without explicit written permission. Participation was voluntary; invitees could decline to answer any question or withdraw at any time.

Approach

Nordicity applied a hybrid inductive–deductive thematic analysis:

- First, deductive coding against a common framework established through a preliminary literature review, which included content lifecycle stages, discoverability strategy types, measures of success, etc.
- Second, inductive coding to surface emergent themes, tensions, and innovations specific to stakeholder experience.

Limitations

The study did not access proprietary platform datasets; observations about algorithms and performance reflect participant experience and publicly shareable information.

Consultations were held in English and in French with a broad set of stakeholders. Observations resulting from these discussions are provided in aggregate with best efforts to reflect the expertise and experience generously shared by participants.

1.5 Definitions and concepts

Defining discoverability

There is no single, broadly accepted definition of discoverability. Indeed, even across jurisdictions, “discoverability” has no single, universal meaning. Related terms, most notably “prominence,” are sometimes treated as distinct levers and sometimes used as synonyms for parts of the same idea. Comparisons therefore require careful attention not only across countries, but also within a given jurisdiction and at different points in the content lifecycle. To ground the discussion, this report defines its key terms up front and sets out how Nordicity maps the interlocking concepts that orbit discoverability.

As consultations confirmed, stakeholders approach it from the vantage point of their role and business model, and it shifts across the content lifecycle (see Section 3.1) and service type (linear broadcasting, on-demand streaming, social media platforms). For some, discoverability is primarily promotion and marketing; for others, it is interface and product design; for still others, it is inseparable from metadata and identifiers. All are right, because discoverability is the set of conditions that determines whether, how, and for whom content becomes visible.

At its core, discoverability sits at the intersection of audiences, content, and their encounter (Canada Media Fund, 2016). In the context of this study, **discoverability is the capacity for a piece of content to be easily found by audiences within complex information environments**. This definition includes both when the audience is aware of and seeking a specific work, and when the audience does not (yet) know the work and encounters it through recommendations, curation, or browsing.

Montreal-based discoverability specialist agency LaCogency has developed a helpful way to navigate this complexity, breaking down discoverability into two simultaneous dialogues: a human-facing dialogue and a machine-facing dialogue.

In fact, discoverability is social, drawing upon influence, marketing tactics, community engagement, star systems, events, and word-of-mouth.

In a digital world, discoverability is equally **engine-powered**: content and information require optimization and metadata hygiene to ensure findability by search engines and algorithms.

Discoverability also unfolds along two time horizons (see Section 3.2). It is **short-term**, about strategically seizing or creating moments (launch windows, cultural zeitgeist, trend alignment) and it is **long-term** (data maintenance, community care and development, catalogue stewardship).

All these dimensions can be visualized in this matrix, clarifying that effective strategies typically operate in more than one quadrant at once.

Figure 1 – The four pillars of discoverability: two dialogues and two time horizons

	Short-term	Long-term
Human-facing dialogue Social discoverability	Traditional marketing Press and media Public relations Events	Online marketing Social media Targeted paid ads Keywords
Machine-facing dialogue Engine-powered discoverability	Optimization Search Engine Optimization (SEO) Answer Engine Optimization (AEO) Generative Engine Optimization (GEO)	Structured data Metadata Wikis SCHEMA and infrastructure

Source: Adapted from LaCogency, Quatre piliers de la découvrabilité

Layered over these mechanisms are levers that can be activated to influence outcomes: regulation and policy, funding and incentives, education and capacity building, governance practices (e.g., shared metadata standards), and industry initiatives/coordination.

Scholarship also reminds us that discoverability is not just a marketing challenge but an infrastructural capability of platforms, a form of media power exercised through interfaces, catalogues, and algorithms (McKelvey & Hunt, 2019), underscoring the **role, responsibility, and intent of different players.**

In short, discoverability is a system of mechanisms, levers, and players (Canada Media Fund, 2016); however, consultation confirmed that **discoverability is not an end in itself.** Its purpose is to initiate and reinforce an audience journey toward consumption, conversion, engagement, and retention. Whatever the tactic or tool, **audience remains the organizing principle:** who we aim to reach, how they encounter the work, and how we sustain that relationship over time.

Modes of consumption and discoverability

Across research, and through the consultations, two modes of content consumption are frequently described. In the **active (lean-forward) mode**, users know what they want and search for a specific title, creator, or type of content; they compare options and exercise high intent. In the **passive (lean-back) mode**, users encounter content via linear schedules (radio/TV), editorial programming (playlists, collections, home-page carousels), or algorithmic recommendations (autoplay, “because you watched/listened”). Both modes co-exist in the same user journey: a viewer may actively choose a service or title, then passively accept a slate of subsequent recommendations (Hracs & Webster, 2020).

In the context of discoverability, the two modes imply different levers. Active moments reward search quality, SEO/metadata precision, creator follow mechanics, and storefront findability. Passive moments depend on prominence surfaces (home-screen rows, shelves, playlist slots), editorial context, and recommendation quality.

Streaming services push back on this active/passive dichotomy. From their perspective, all listening/watching is (inter)active because every session is user-initiated and continuously shaped by signals, even when it feels lean-back. As such, streaming services emphasize user choice and retention. As further explored in Section 9, success is defined by a user choosing their service, choosing a title, watching/listening through, and liking it. This vision leans toward protecting the active choice moment and avoiding heavy-handed “passive” shoves.

Stakeholders interviewed also noted regulatory boundaries: the CRTC cannot (and should not) dictate what Canadians actively search for or like. However, there is scope to facilitate “passive” discoverability (i.e., ensuring Canadian and Indigenous works are presented, findable, and fairly surfaced within services and, where relevant, upstream device interfaces) while leaving ultimate choice to audiences.

Glossary

Advertising video on demand (AVOD): Streaming where viewers watch content for free (or lower cost) and the service is funded by ads.

Broadcasting distribution undertakings (BDUs): Provide subscription television services to Canadians. They distribute conventional television, discretionary, and on-demand services.

Broadcaster Video on Demand (BVOD): On-demand services run by traditional TV broadcasters (e.g., network catch-up apps/sites).

Community of interest: A group of people connected by a shared topic, identity, need, or passion, whose attention and behaviours can be engaged around specific content or creators.

Contribution: Financial obligations that governments place on traditional broadcasters and/or online video services. This mechanism can involve requiring these services to pay into the country's audiovisual fund or to invest in the creation and/or promotion of domestic content.

Discovery: The moment when a user encounters a piece of content or creator for the first time.

Fandom: The community of highly engaged fans around a work, artist, or piece of content (e.g., franchise) driving word-of-mouth, social media engagement, repeat consumption, and user-generated content.

Free ad-supported streaming TV (FAST): Linear, channel-like streaming delivered over the internet, free to viewers and funded by advertising.

Findability: A component of discoverability that refers to the ease with which audiences can locate specific, known pieces of content they are actively seeking.

Intellectual property (IP): The underlying rights to creative works (e.g., characters, story worlds, recordings) that can be licensed, adapted, and monetized across formats.

Online video services: Websites or apps which transmit professionally produced films or TV shows (e.g., Crave, Disney+, Netflix). This does not include video-sharing services (e.g., YouTube, Vimeo) or social media.

Presence: Availability of a piece of content in the library of a given service.

Prominence: Visibility of a piece of content on online streaming services. While prominence is often used as a synonym of discoverability, especially in the European Union, it should be approached as a component of discoverability.

Promotion: The set of audience-facing activities designed to create awareness, interest, and action for a piece of content, creator, or service. Promotion includes online marketing (e.g., social media campaigns, paid ads) and traditional marketing (e.g., TV, press, out-of-home, events).

Subscription video on-demand (SVOD): Streaming where users pay a recurring fee for on-demand access to a catalogue of video content.

Traditional broadcasting services: Non-internet based TV channels and radio.

Transmedia: a term commonly used in the past to describe storytelling, based in a single IP, across multiple platforms (e.g., TV series, video game, and book), generally assuming the content is created and released concurrently.

2. DISCOVERABILITY IN A DIGITAL WORLD

2.1 Global broadcasting context

Audiovisual market

The global audiovisual market has experienced significant transformation in recent years, driven by the rise of new digital platforms, shifts in audience behaviour, and evolving monetization strategies. The global video streaming market is on course to increase from US \$106.8 billion in 2023 to US \$416.8 billion by 2030, representing a 21.5% compound annual growth rate (Research, Video Streaming Market Size & Share, Industry Report, 2030, 2025). Some forecasts predict even higher growth, estimating the market could reach US \$508.8 billion by 2030 (Intelligence, 2025).

At the same time, traditional broadcasting is facing a steady decline. The number of pay TV households worldwide has steadily decreased over the past years and will continue to fall over the years to come. In Europe, for example, the number of pay TV subscribers is forecast to decline by around 10 million between 2023 and 2029 (Stoll, 2025). Globally, broadcast and pay TV revenues are projected to shrink by as much as \$42 billion during this period (Simmons, 2025). There has also been a notable decline in production spending. Many major streamers and studios have begun to pull back investment due to economic uncertainty, market saturation, and a drive toward profitability. This contraction raises additional challenges for content discoverability, especially for smaller markets like Canada, where fewer international co-production or distribution opportunities may be available. In Canada specifically, total production volume dropped 18.5% in 2023–2024 as compared to the previous year (CMPA, 2024).

In contrast, digital platforms are rapidly expanding. Subscription video-on-demand (SVOD) platforms like Netflix, Amazon Prime Video, and Disney+ continue to dominate, while free ad-supported streaming TV (FAST) and ad-supported video-on-demand (AVOD) are also growing in popularity. Services like Tubi, Pluto TV, and Samsung TV Plus

are capitalizing on demand for free, linear-style digital content, while also introducing new advertising and recommendation models.

YouTube has become a leading platform in the global audiovisual landscape. YouTube now functions as a major broadcaster in its own right. Many consumers rely on YouTube as their primary video platform, often bypassing both traditional broadcasters and premium streamers. Although not typically seen as an SVOD service, YouTube is in fact the true victor when it comes to audience engagement and is Netflix's main threat. In 2024, YouTube made up 10.4% of all TV viewing in the US, compared to Netflix at 8.4%. (Nielsen, 2025).

Audience behaviour is also evolving with viewers increasingly engaging in multi-platform and multi-screen consumption including streaming services and social media. Younger audiences, in particular, show strong preferences for mobile-first, on-demand, and short-form content that are often outside traditional broadcast or streaming ecosystems.

In this increasingly competitive and algorithm-driven environment, discoverability has become a central concern for creators, distributors, and policy-makers aiming to ensure Canadian content remains visible and accessible. The combination of global competition, personalized recommendation engines, and data asymmetries challenge the ability of Canadian content to surface organically. Ensuring that audiences become aware of Canadian programming today takes more than simply making content available online: it requires efforts to coordinate technology, promotion, and metadata – along with an aligned policy framework.

Audio market

The global music industry has experienced a fundamental transformation over the past decade, driven by the rapid shift from traditional radio broadcasting and album sales to digital streaming platforms. The global recorded music industry generated an all-time

high of US \$29.6 billion in 2024 – up 4.8% from 2023 – and streaming has grown to account for 69.0% of total revenue (IFPI, 2025).

While radio, album sales, and other traditional consumption models continue to play a role in music promotion and discoverability, particularly for certain demographics and genres, their dominance has been disrupted by streaming platforms like Spotify, Apple Music, Amazon Music, and YouTube Music. These platforms have transformed music consumption from a scheduled, curated broadcast model to an on-demand, personalized experience that operates across global markets.

This shift toward the streaming model has created both opportunities and challenges for the music ecosystem. Artists now have direct access to global audiences and distribution tools like streaming platforms and social media without requiring traditional gatekeepers like radio programmers or record label distribution networks. On the other hand, the sheer volume of content uploaded to streaming platforms has created an oversaturated marketplace where discoverability has become increasingly challenging; as of 2023 approximately 120,000 new songs per day are uploaded to Spotify (Luminate, 2023). This exponential growth has become so overwhelming that a single day in 2024 saw more music released than the entirety of 1989 (Pilley, 2024). While the growing dominance of streaming has democratized market access, market data indicates that the top 1% of global artists account for approximately 90% of all music streams, leaving minimal market share for emerging and mid-tier artists (Blake, 2020).

The rise of streaming has also had a globalizing effect on the domestic music market as Canadian audiences, once predominantly exposed to Canadian music through regulated radio content requirements, now have unrestricted access to global music catalogues. To the extent that market access supports consumer choice, it has also diluted the domestic market share for Canadian music. Nevertheless, the streaming era has created opportunities for Canadian artists to reach global audiences, with Canada now ranking as the third-largest music exporter worldwide, behind the US and UK (Luminate, 2024).

However, this success comes alongside significant structural upheaval as it relates to discoverability: massive daily content uploads creating attention scarcity, algorithmic discovery systems operated by foreign platforms, social media necessitating artists to become daily content creators, and funding ecosystems under pressure as traditional promotional pathways disappear. Supporting Canadian creators in navigating this new market for audio content and getting their work in front of audiences will require coordination across the Canadian ecosystem, from artist development and marketing to metadata management, Canadian regulatory processes, and modernized funding mechanisms.

2.2 The attention economy and the currency of audience

In today's attention economy, audience time, not shelf space, is the scarce resource. Content distribution services and platforms compete for audience attention by investing in content that will meet audience demand. Ideally, that content is extendable or repeatable in some manner that will keep the audience engaged. IP, then, is about more than one specific work. This shift reframes content competitiveness around two fundamentals: treating IP as the core, portable story world (separate from any film, series, novel, record, webtoon, toy, etc.) and treating audiences as active partners in the development and discoverability of content (CMF & Nordicity, 2025). Telefilm Canada's ("Telefilm") foresight report *Exploring the Futures of Distribution* underscores the same macro driver: a saturated marketplace has turned attention into a scarce resource and intensified competition for visibility. What travels is what communities already care about (Telefilm Canada, 2025). In short, audience is the marketplace's currency, and IP is the bankable asset that compounds when communities form around it.

Platforms are gatekeepers only to the extent that audiences are captive, and they increasingly are not. The result is an inverted sequence: rather than "make content, then find an audience via platforms," creators validate audience-IP fit first, and then express that IP in the format(s) that maximize engagement. Practically, that means testing worlds, characters, and aesthetics with communities of interest (e.g., teasers,

proofs-of-concept), capturing early signals (watchlist adds, pre-saves, shares), and letting those signals shape the IP bible (CMF & Nordicity, 2025). This method can mitigate churn risk by ensuring early and sustained engagement. This approach is further explored in Section 3.2.

This shift also changes how content creators and their partners invest. Running concurrent IP and audience development alongside production strengthens creators' resilience, ownership, and long-term valuation: creators arrive to market with finance-grade evidence of demand and a stronger position for negotiating rights and terms (see Sections 3.3 and 3.4). Authentic, ongoing engagement with communities of interest improves launch discoverability and multi-platform adaptability. Transmedia, or multi-platform storytelling, has evolved from a 2010s funding add-on into an audience expectation, with malleable IP designed to live across formats and social spaces. Policy and program design mirror this logic when funding supports concurrent IP and audience development in addition to production. Canadian projects that develop content and audience concurrently launch into existing demand rather than having to try to manufacture it post-delivery/launch (CMF & Nordicity, 2025). This major shift is a foundational concept to understanding and enhancing discoverability and is thus central to the present report.

2.3 How do audiences make choices?

“Multiply the points of entry. This is what discoverability is.”

- Broadcaster

In today's media environment, audiences are burdened with choice when deciding how to spend their free time. Thousands of audio and audiovisual works from around the world of all types and lengths are available to Canadian audiences online along with social media and video games in the broader media and entertainment ecosystem. **For**

content to “break through” to consumers, multiple factors must align: the content needs to be available and visible on platforms and services, resonate with audience preferences, and generate attention and momentum off-platform through reviews, viral moments, discourse, awards, and other forms of buzz.

Discoverability is further impacted by whether audiences are inside the “walled gardens” of streaming, where recommendation engines or sophisticated algorithms influence what audiences are most likely to encounter and engage with. **Audience choice is not simply about selecting one piece of content;** it is also about deciding to access and pay for particular services, either in the form of cable packages or streaming subscriptions.

There is a common perception that algorithms and recommendation engines are all-powerful drivers of online discoverability, “trapping” audiences in constant consumption cycles (Johnson, Hills, & Dempsey, 2024). However, research shows that audiences are conscious and wary of being coerced by algorithms (Johnson, Hills, & Dempsey, 2024). Ultimately, **while algorithms are fundamental in shaping choice, they are not the absolute determinants of discoverability.**

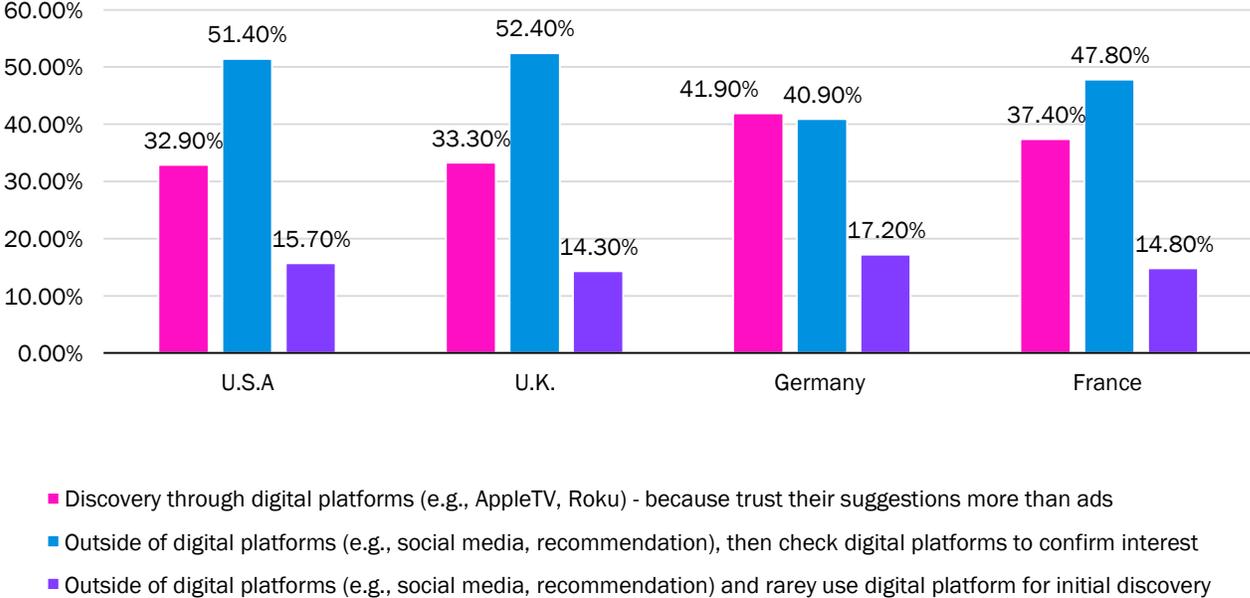
“It’s very important that we frame discoverability beyond the app or our service. Getting people onto our app is already in and of itself a challenge.”

- Streaming service

An analysis of cross-market audiovisual content discoverability and prominence conducted by Looper Insights provides findings into how audiences discover content on streaming services and ultimately make choices. This analysis also compares content discoverability and prominence between audiences in European regions that focus on content prominence measurement and regulation (France, Germany, and the UK) and the US. The study found that despite the regulatory differences across these markets, the discovery patterns were similar for audiences of streaming services. When asked which

statement best describes their process for discovering TV shows or films on streaming services, most respondents indicated that they first discover content outside of the streaming services, through social media, ads, online searches, and recommendations, and then use the streaming service’s recommendation to validate or confirm their interest.

Figure 2 – Primary source of discovery for streaming service releases (TV shows or films), in the US, the UK, France, and Germany



Source: Looper Insights, NAVIGATING DIGITAL ENTERTAINMENT: A Cross-Market Analysis of Content Discoverability and Prominence

These results were emphasized throughout stakeholder consultations. Many participants noted that audiences discovering, and engaging with, content is dependent on a confluence of factors beyond the broadcaster or streaming service’s efforts.

Telefilm’s 2024 *Canadian Moviegoing Report* surveyed movie-goers on the specific factors and conditions that impact decision-making and provides insights into discoverability and audience choices related to theatrical releases. Among the top attributes that impact decision-making to see a film in theatres were Genre (75%), Big-screen worthy (75%), Good reviews (67%), Actors (67%), Visual effects (63%), Sequel (61%), and Heard it was a

must-see (60%) (Telefilm Canada, 2025). Whether the film had Canadian story/culture only accounted for 34% (Telefilm Canada, 2025). The report also found that word-of-mouth, award buzz, and fear of missing out increased in importance for movie-goers from 2019 to 2024 (Telefilm Canada, 2025). This data shows that in the case of a theatrical experience, decision-making hinges on universal motivators and cultural relevance, and less on Canadian identity. Section 4.2 further explores the importance of theatrical releases to reach targeted audiences (impact filmmaking), and increasingly common combined theatrical and streaming launch strategies.

In the audio sector, decision-making also rests on many inputs such as radio play, influence of friends, live performance, and synchronization with audiovisual content. However, social media and platform algorithms increasingly represent the trigger for what people will play next (IFPI, 2023). While listeners tend to replay their favourite artists, they also lean on curated and algorithmic playlists keyed to genre, mood, or situation – for example, exercising, cooking, or commuting (Siles, Segura-Castillo, Sancho, & Solís-Quesada, 2019). These patterns reflect how music now increasingly soundtracks daily activities and short-form video, rather than representing a purely rational, title-by-title choice (see Section 4.3). On the importance of fandom in choice making, research indicates that it is becoming more challenging for artist to grow their fan base, despite the unique opportunities offered by social media (MIDiA, 2025). In fact, social visibility does not automatically convert into lasting fans: recent data show that virality often stalls at the clip, with social video competing against time spent on actual streaming. The “discovery funnel,” guiding new audiences from the initial spark to sustained listening to fandom, appears to be broken. Research suggests that while social apps can deliver the spark, YouTube and streaming services remain the top on-ramps to real discovery and listening, and that younger users are less likely to progress through the funnel from clip to stream to fandom (MIDiA, 2025).

Both consultations and research indicate that word-of-mouth is a very important factor for discoverability and decision-making. Word-of-mouth is a broad term that can refer to “both on and offline inter-personal communication with friends, family, and colleagues,

as well as mediated communications from wider social media networks online” (Johnson, Hills, & Dempsey, 2024). Word-of-mouth is essential to discoverability because it is deeply embedded in audiences’ social interactions, connections, and everyday life. In some cases, audiences consume content not because it necessarily aligns with their interests but because it is a way for them to participate in conversation or understand cultural references. During consultations, streaming service representatives acknowledged that they have many discoverability tools at their disposal, but there is no greater driver than word-of-mouth, fandoms, organic virality, and the cultural zeitgeist.

The power of word-of-mouth: Skinamarink

Skinamarink (2023) is a Canadian experimental horror film by filmmaker Kyle Edward Ball, set in 1995 and inspired by childhood nightmares. Before making the feature, Ball had a YouTube channel called Bitesized Nightmares, where he recreated viewers' nightmares. He later produced a short film, Heck, that would act as a proof of concept for Skinamarink.

The project was very personal and grassroots. The film's budget was \$15,000, mostly raised through crowdfunding, and was filmed in Ball's childhood home in Edmonton, using equipment sponsored by Alberta's Film and Video Society.

When the film premiered at the Fantasia International Film Festival, a distribution deal was secured with Shudder, the horror-focused streaming service. The film played at several other festivals; however, a leak occurred through a festival's online viewing platform, exposing the entire slate to piracy. Full copies of Skinamarink circulated across social media. What seemed like a setback for distribution unintentionally fuelled the film's discoverability, and generated word-of-mouth discussion and virality. The film especially resonated with audiences on TikTok and X and helped the film reach global audiences, which reinforced Shudder's commitment to distribution. The film would also go on to be acquired by AMC Networks for a theatrical release, bringing in a total of \$2.1 million at the box office.

With a modest budget and limited resources for distribution, Skinamarink illustrates the critical role of word-of-mouth in today's attention economy. The film's success shows how audience-driven promotion can be as important as traditional marketing in motivating audiences.

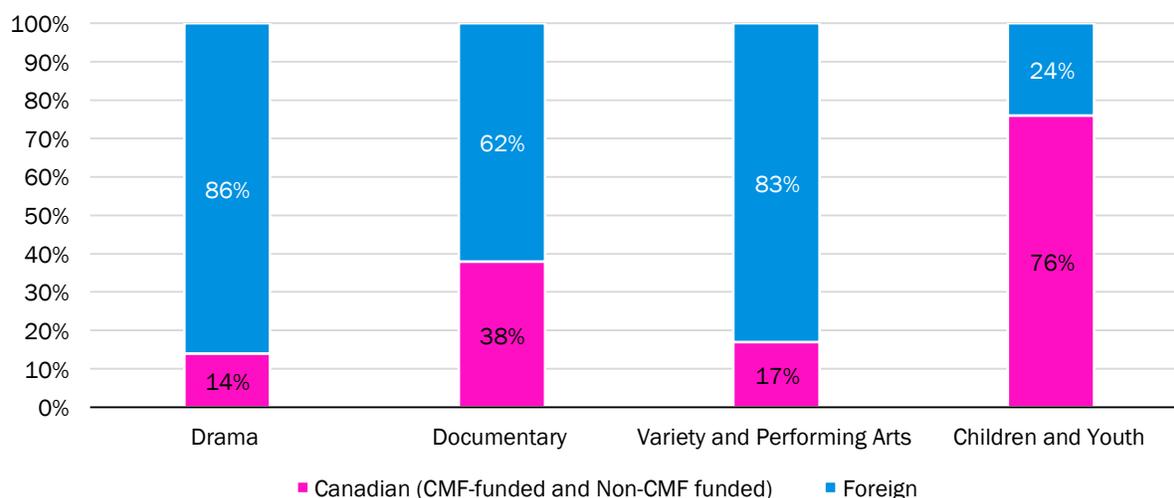
2.4 Consumption of Canadian content

Audiovisual market

Canadian content has achieved notable successes across genres and mediums; however, there are persistent challenges in achieving visibility, at home and abroad. Content from English Canada is particularly challenged, given the availability of English-language media to audiences. French-language content is more successful in connecting with Canadian audiences because of French Canada’s unique language, culture, and star system – but the total market is smaller.

Regarding peak-hour English linear television consumptions, domestic-produced programs accounted for just 36.3% of viewing in 2022/2023. Domestically produced content within the Drama category made up the lowest percentage of peak-hour consumption at 14%. In contrast, the Children and Youth category programming accounted for the highest percentage of peak-hour Canadian content consumption, at 76%.

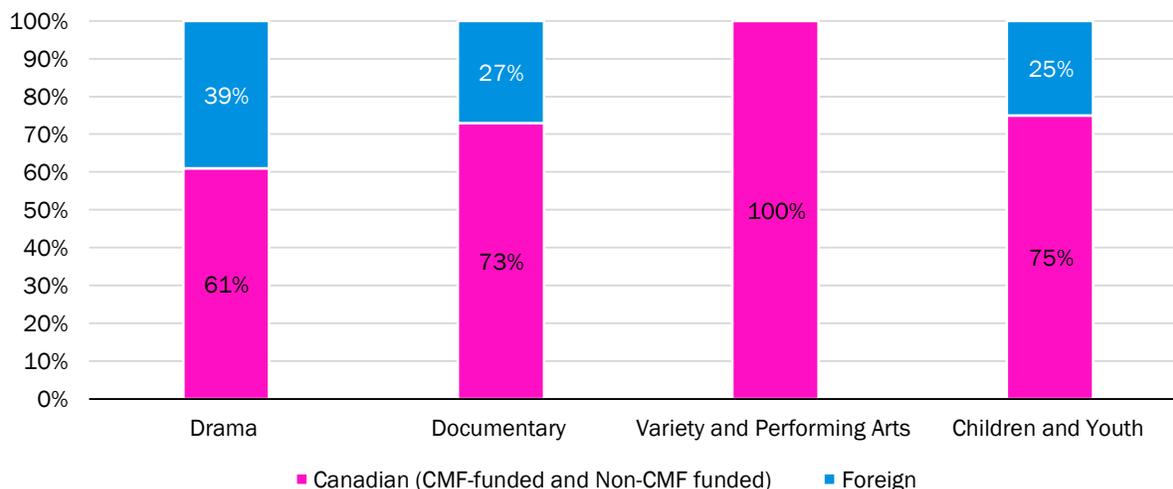
Figure 3 – Peak hour English viewing in Canada, by country of origin of content and genre, 2022/2023



Source : Canada Media Fund, 2023-2024 Annual Report

French-language television is more successful in capturing linear audiences, nearly doubling the engagement of English content. Peak-hour Canadian French-language linear television accounted for 77.3% of viewing.

Figure 4 – Peak hour French viewing in Canada, by country of origin of content and genre, 2022/2023

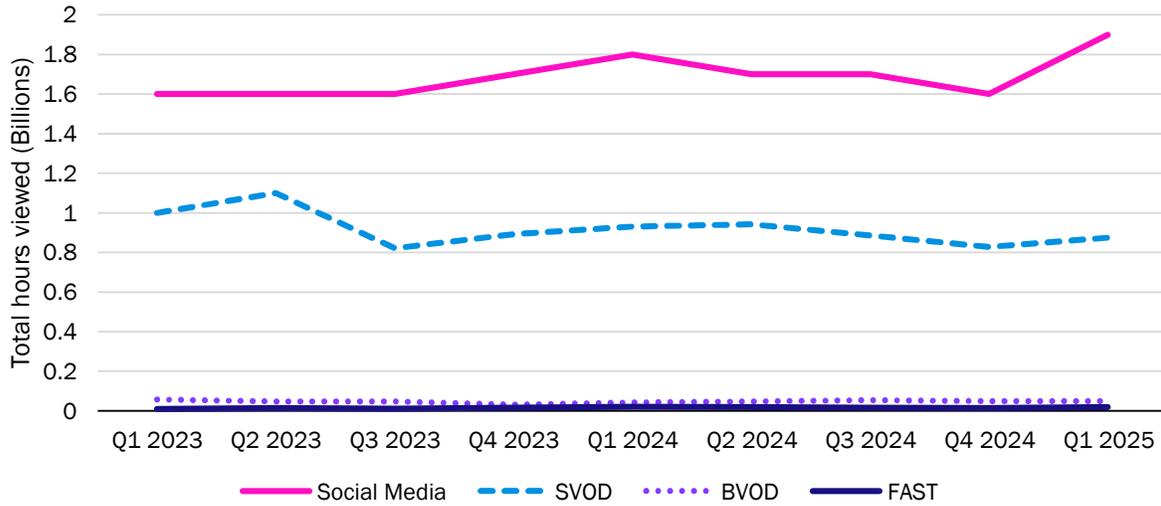


Source: Canada Media Fund, 2023-2024 Annual Report

Canadian film consumption faces steep challenges, specifically when it comes to theatrical releases. In 2023, only 3.3% for the total box office revenue in Canada was attributed to Canadian films (CMPA, 2024). Over the past decade, that share has not exceeded 5.2%, underscoring the ongoing difficulty Canadian films face in attracting domestic audiences amid the prevalence of foreign titles (CMPA, 2024).

The breakdown of Canadian content consumed on streaming services is not available; however, streaming is very popular with Canadians. CRTC data found that viewers in Ontario and Quebec tend to prefer social media services (e.g., YouTube, Instagram, TikTok, X) above all other streaming services. As of the first quarter of 2025, social media in Ontario and Quebec accounted for 1.9 billion viewing hours, whereas SVOD viewing accounted for 875 million hours, BVOD accounted for 50 million hours, and FAST accounted for 20 million hours.

Figure 5 – Total hours viewed by service type in Ontario and Quebec



Source: CRTC, Communications Market Report, “Current Trends - Audience Measurement”

Given the vast availability of global content and the dominance of international platforms, it is likely that the share of Canadian content viewed by Canadians is much lower than traditional consumption (linear and theatrical); however, online services currently do not provide consumption data at the national level that would confirm preferences by country of origin of content.

The consumption of Quebec-made content is tracked through an audience survey, conducted by L’Institut de la statistique du Québec, that provides insights into consumption habits in the province. Results from the 2024 survey indicate that among people watching TV shows and films on linear and online services, 35% primarily watch non-Quebec-made content. This share goes up to 64% for the 15–29 age group (ISQ, 2025). A similar trend is observed for theatrical releases: 58% of Quebecers and 80% of the 15–29 age group who are going to the movies primarily watch non-Quebec feature films (ISQ, 2025).

Among social media services, YouTube is very popular among Canadians. According to Comscore, 98% of Canadians access YouTube, across all audiences in 2023 (Canada Media Fund, 2024). YouTube also leads as the number one ad-supported platform in the

country. Increasingly, YouTube content is becoming longer: 60% of YouTube watch-time on connected TV is 21 minutes or longer, rivalling the long-form content of broadcasters and streaming services (Canada Media Fund, 2024). Long-form content is progressively finding its way onto YouTube, rivalling both streaming services and traditional broadcasters and especially attracting younger audiences. YouTube's impact is further explored in Section 4.2.

Despite relatively low engagement with Canadian content, some research points to a developing appetite for Canadian content and stories. A 2025 survey on Canadian identity and Canadian cultural industries found that 91% of respondents support creating more Canadian content for domestic and international audiences (CMPA, 2025). Additionally, 83% of respondents agreed that Canadian cultural identity should be highlighted and supported through the stories and perspectives show on screen (CMPA, 2025). These attitudes may be shaped by recent concerns over US influence and the movement to support Canadian industries and products.

Throughout consultation, creators and independent producers also spoke about how they perceive consumption of Canadian content. Broadly, there is concern over the limited visibility and consumption, with many feeling that content is too often buried and disconnected from audiences in an overwhelming sea of foreign film and television. Among consulted creators and producers, this disconnect with audience is attributed to lack of appropriate planning and promotion for Canadian content, especially for low-budget projects. There is a shared sentiment that unless a project is fully supported by a streaming service or aligns with popular trends, it will be unreachable to audiences. Despite not being directly tied to discoverability, some other creators emphasized that if not for mechanism like Canadian Programming Expenditures (CPE) and Programs of National Interest (PNI), there would be no visibility or consumption of Canadian content at all.

“Marketing is the same old approach – no strategy, no effort, no originality, no budget, no results.”

- Director

Audio market

In the audio market, Canada has experienced massive export success. Canada is now recognized as the third-largest music exporting country in the world (Luminate, 2024), suggesting that the country’s music industry has been punching above its weight for a country with a population of ~40 million.

As of 2024, 92% of royalties distributed by Spotify to Canadian artists are coming from consumption outside of Canada (Spotify, 2025). Meanwhile, among the top 10,000 global artists on streaming platforms in 2022, 889 were Canadian (Page, 2023). While much of this success has been with major English-language artists and music, the share of Canadian English- and French-language artists in that list of top global artists generally maps to Canada’s population demographics, with roughly 75% performing in English and roughly 20% performing in French (Page, 2023).

Indeed, the French-language market is growing rapidly, with Spotify royalties for French-language artists increasing by 15% in 2024, representing a fivefold increase from 2017 (Page, 2023). Meanwhile, Punjabi music is the fastest-growing music language in Canada, representing 3% of Canadian artists’ language of choice (Page, 2023). This data illustrates that though the Canadian music market is often discussed in domestic terms, Canada’s music industry has developed significant global reach, with its export success and international streaming performance indicating strength beyond the domestic market.

Meanwhile, domestic consumption patterns reveal distinct differences between streaming and traditional, linear broadcast platforms. Audio streaming now accounts for

close to 79% of recorded music revenue in Canada, far exceeding other formats (Spotify, 2025). Despite the rise of streaming, AM/FM radio still enjoys a significant market position, reaching 81% of Canadians every week for an average of 7.1 hours per week (Numeris, 2025). Nevertheless, radio's share of overall listening has declined by roughly 1.8% annually since 2020 (CRTC, 2025), influenced in part by the integration of technology like Bluetooth and Apple CarPlay in car manufacturing.

Canadian music enjoys greater prominence in traditional broadcasting with Canadian-content regulations requiring radio to play 35% Canadian music (and 65% French-language selection on French-language stations). By contrast, on streaming services Canadian artists capture only about 10% of domestic audiences, indicating a substantial gulf between current regulations for linear and audience-driven consumption on streaming (Page, 2023). Research commissioned by various organizations (Department of Canadian Heritage, Music Canada, Canadian Association of Broadcasters) seems to confirm that the Canadian stream share stands between 7.6 and 10.5% of domestic streams (SOCAN, 2025).

In fact, unions and industry association flag that these success stories showcasing Canada's music on the global stage are nuanced, as Canadian songwriters and composers struggle to make a sustainable living – a reminder that consumption has a tangible impact on creators. An examination of royalty distribution indicates that the value returned to Canadian songwriters and composers (through SOCAN) is decreasing on both traditional and online services. In 2024, only 29% of royalties collected in Canada through traditional audio media went back to Canadian creators. On online audio services, SOCAN redistributed only 9.9% of total royalties while foreign societies captured the other 90.1% collected in Canada. The situation is also concerning for audiovisual composers and writers, with 32% redistributed to Canadian composers in traditional media and a meagre 5.6% in online audiovisual services (SOCAN, 2025). Academic research has further highlighted the increasingly precarious position of Canadian independent musicians in the streaming era (deWaard, Fauteux, & Selman, 2022).

“How does a composer of Canadian music break through a mountain of 100,000 new works uploaded every day? How does a songwriter compete with the 20,000 wholly generated AI works uploaded [...] daily? How can AV composers survive the constant pressure of diminishing budgets and being asked to do more for less? How do our Francophone brothers and sisters protect and promote their works in an ocean of Anglophone content?”

- Creator and industry association representative

A Quebec audience behaviour survey conducted by L’Institut de la statistique du Québec shines a light on audio consumption. Some 65% of respondents indicated subscribing to an audio streaming service. Only 9.5% primarily listen to artists from Quebec while 40.8% responded that they predominantly listen to non-Quebec artists. Similarly to what was observed in audiovisual, this trend is more pronounced with younger age groups, with only 3.9% of those 15–29 listening mostly to Quebec artists, and 69.2% playing mostly non-Quebec artists (ISQ, 2025). Podcasts fare better with 46% of the respondent population primarily listening to Quebec podcasts, a share only going down to 38.6% for the 15–29 group (ISQ, 2025).

3. LIFECYCLE STRATEGIES

Discoverability is not a late-stage marketing push nor a task that rests solely with broadcasters and online services. It is a throughline that begins at IP conception and runs across development, financing, production, release, and long tail. This section introduces the content lifecycle and shows where discoverability intersects with each stage, mapping the roles of key stakeholders.

This section illustrates that effective strategies start early: with audience identification, testing, and community-building that inform creative choices and packaging long before launch. From there, a suite of tools and mechanisms sustain interest at each contact point until audiences choose to watch or listen. Underpinning this journey is a robust IP development pipeline that evaluates and champions high-potential projects, increasing their odds of surfacing organically in an ocean of content. Strategic intervention can stimulate this approach and bridge gaps where market fails. Subsequent sections will detail these tools, mechanisms, and the distinct strengths different stakeholders bring to each stage of the lifecycle.

3.1 The content lifecycle: from ideation to catalogue

Ensuring content is discoverable and is reaching intended audiences is not the responsibility of a single stakeholder but instead is a convergence of several actions by multiple players throughout the content lifecycle.

While lifecycle phases can slightly vary from one project to the next, and between audiovisual and audio content, the journey from creators to audience can generally be broken down into four key moments.

Phase 1 – Ideation, Development, and Validation: In this stage, creators and their partners develop and test ideas and concepts – for example through brainstorming, experimentation, audience research and testing, professional development/networking,

acquisition of IP (including rights to scripts, books, etc.), pitching, and early audience engagement. Capacity-building and skill development are also included in this phase. Regulators and support agencies are key in creating a fruitful environment where competitive audio and audiovisual content can emerge.

Phase 2 – Financing and Partnerships: In this stage, rights-holders establish creative and financing relationships for partnerships and collaborations. This stage is crucial for audiovisual projects to move forward, and for funding for phase 3 and 4 marketing and promotion (discoverability potential) to be acquired. In the case of audio, this phase is somewhat different: creative collaborations, whether joint song-writing or shared performance opportunities, are a means to enhance and evolve artists’ content and audience development. For some, this stage may include securing arts council creation and/or marketing funding as well as industry agency and association support for performance, recording, and/or export initiatives.

Phase 3 – Production: In this stage, content is created and turned into a finished product – for example, a movie is filmed or an album is produced.

Phase 4 – Launch: In this stage, content is released, distributed, and promoted. The conversation with audience peaks at the launch phase.

Phase 5 – Post-Launch and Catalogue: After the launch and initial release, this stage culminates content’s ongoing circulation in the market (long tail). This stage may include syndication, streaming, merchandising, and repackaging. Analytics and feedback from the post-launch stage may inform future content.

This section describes each key stakeholder groups within the audiovisual and audio sectors and how they contribute to content discoverability at various stages of the content lifecycle. It highlights actions that stakeholders may take to enhance visibility and indicates where responsibilities typically lie along the content value chain. Discoverability

is not a one-size-fits-all approach. Not all content will require, or benefit, from an action listed, and some stakeholders may lack the resources to implement certain measures. Furthermore, this mapping is not intended to be a comprehensive list of discoverability actions but a guide to illustrate the extent to which each stakeholder plays an active role throughout the content lifecycle and how they interact with each other.

Some actions directly support discoverability (e.g., digital marketing, prominence requirements, awareness campaigns), while others are more indirect (e.g., production funding, awards). Both direct and indirect actions are fundamental in enabling content to reach audiences.

Regulators

Regulators develop and enforce regulatory measures and policies that support production and distribution of local or national content. Regulators’ actions can vary from direct enforcement of content prominence requirements to indirect measures like tiering and linkage requirements for pay and specialty TV services.

The table below outlines regulators’ assumed or potential actions across the content lifecycle.

Figure 6 – Examples of discoverability actions – regulators – audiovisual

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Administer and regulate broadcasting licences and conditions of service that provide frameworks to stipulate how the	√			√	

content sector should be strengthened					
Enforce funding requirements (e.g., PNI, CPE)	√	√			
Enable co-production treaties		√	√		
Administer <i>Broadcasting Act</i> and its provisions (e.g., 9.1(1)(h))				√	
Enforce regulations related to prominence requirements				√	√
Define data governance and support infrastructure				√	

Figure 7 – Examples of discoverability actions – regulators – audio

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Administer and regulate commercial radio, satellite radio, and campus/community radio broadcasting licences	√			√	
Enforce funding requirements (e.g. CCD for radio, requirements under <i>Online Streaming Act</i>)	√	√			
Administer <i>Broadcasting Act</i> and					

its provisions (e.g., 9.1(1)(h))					
Enforce regulations related to prominence requirements				√	√
Enforce Canadian content quotas for relevant services				√	√

Creators

Creators develop and produce the content that audiences can discover and consume. This group primarily includes the “makers” and their direct partners: independent creators (e.g., filmmakers, musicians), production companies, record labels, etc.

The table below outlines creators’ assumed or potential actions during the content lifecycle.

Figure 8 – Examples of discoverability actions – creators – audiovisual

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Carry out research, trend, and audience analysis	√				
Engage early with specific groups of interest and build community	√				
Register rights for high-value IP	√				
Develop proofs-of-concept, sample content	√				

Engage in artistic collaborations	√	√	√	√	
Carry out crowdsourcing initiatives		√			
Secure funding for promotion, discoverability, and marketing		√			
Pitch story/content to investors, broadcasters, online services, etc.		√			
Attend markets and festivals	√	√		√	√
Structure co-productions		√			
Host test screenings			√		
Create early promotion material, with "first looks," behind-the-scenes material, social media posting			√		
Complete post-production related to accessibility (e.g., captioning, dubbing)			√		
Leverage the following of associated talent (e.g., cast fandom)				√	
Leverage cultural groups of communities of interest (e.g., film leveraging audiences in other countries with relevant ties to content)				√	

Produce ancillary content for online marketing, buy media ads				√	
Engage in brand partnerships to promote content				√	
Fill in metadata requirements, create and update Wikis and industry databases				√	√
Post and promote on social media				√	√
Engage in retail strategies (e.g., sales of physical media or merchandise)				√	√
Exploit IP and rights (e.g., merchandise development, adaptations, sales on other services and territories)					√

Figure 9 – Examples of discoverability actions – creators – audio

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Carry out research and audience analysis to identify market opportunity	√				
Build core songwriting and performance skills	√				
Attend industry events and conferences					

Engage with audiences and build grassroots community, notably via social media	√	√	√	√	√
Develop demo songs and identify market opportunity	√		√		
Engage in collaboration and co-writing	√	√	√		
Secure grants and funding		√			
Develop management, representation, and publishing ties		√			
Record songs (in Canadian studios to maintain MAPL compliance)		√	√		
Master for different consumption contexts (radio edit, streaming, vinyl)			√		
Develop unique visual identity, voice, and branding	√	√	√	√	
Fill in metadata and industry database requirements			√	√	√
Produce ancillary content (e.g., music or lyric video, behind-the-scenes, alternative versions, remixes, live videos)			√	√	
Develop a comprehensive marketing campaign, including social				√	

media and media bloggers/influencers					
Coordinate distribution and publishing across platforms and markets				√	
Submit and pitch to playlist curators and radio programmers				√	√
Go on tour and perform live				√	√
Perform in industry showcases, opening acts, and festivals				√	√
Secure sync licensing deals (film, TV, advertising, gaming)		√			√

Distribution systems

Distribution systems include audience-facing services and interfaces that carry, aggregate, recommend, promote, and present audio and audiovisual content. This group includes broadcasters, BDUs/distributors, streaming services, device/OS interfaces (e.g., smart-TV platforms, set-top boxes), and distribution intermediaries (e.g., film distributors, music publishers).

The table below outlines distribution systems' assumed or potential actions during the content lifecycle.

Figure 10 – Examples of discoverability actions – distribution systems – audiovisual

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
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Attend markets/festivals	√	√			
Carry out research, trend, and audience analysis	√				
Create augmented experiences in relation to content	√		√	√	
Leverage vertical integration	√	√	√	√	√
Host test screenings			√		
Create early promotion material, with “first looks,” behind-the-scenes material, social media posting			√		
Complete post-production related to accessibility (e.g., captioning, dubbing)			√		
Implement streaming service curation				√	√
Implement streaming service algorithms or recommendation systems				√	√
Leverage audiences of similar content				√	
Leverage the following of associated talent (e.g., cast fandom)				√	
Leverage cultural groups of communities of interest (e.g., French Canadian film)				√	

leveraging audiences in Francophone countries)					
Produce ancillary content				√	
Engage in brand partnerships to promote content				√	
Engage in digital marketing initiatives (e.g., paid ads)				√	
Create release strategies (e.g., special engagements, simultaneous releases, streaming service production theatrical releases)				√	
Strategic placement on devices (e.g., SmartTV home menu)				√	√
Engage in award nomination campaigns (e.g., For Your Consideration events)				√	
Post and promote on social media				√	
Engage online influencers and utilize guerilla marketing strategies				√	
Leverage SEO and metadata				√	√
License content to (or operate) FAST channels					√

Engage in sync or licensing agreements					√
Seasonal or contextual curation (e.g., feature Christmas films in December)					√
Engage in retail strategies (e.g., sales of physical media or merchandise)					√
Exploit IP and rights (e.g., merchandise development, adaptations, new territories)					√
Engage in syndication					√
Special events or re-releases (e.g., anniversary)					√

Figure 11 – Examples of discoverability actions – distribution systems – audio

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Conduct market research and audience analysis	√				
Attend music industry showcases, festivals, other A&R activities	√	√			
Build relationships with artists, labels, other industry personnel	√	√			

Form strategic partnerships with other platforms and services (for sync licensing, publishing, distribution, etc.)		√			
Create custom audio content (e.g., station IDs, promos, live sessions)			√	√	
Develop ancillary content (e.g., music videos, artist interviews, behind-the-scenes, documentary content)			√	√	
Implement accessibility and localization features (e.g., content in multiple languages, audio description)			√	√	
Develop targeted marketing campaigns and promotional strategies				√	
Execute strategic playlist curation and programming decisions				√	√
Create seasonal, contextual, and event-driven programming (e.g., holiday playlists)				√	√
Execute strategic device placement and platform integration (e.g., for smart devices, automotive systems)		√			√

Host and sponsor live events (e.g., listening parties, artist showcases)				√	√
Develop merchandise and other commercial brand extensions				√	√
Maintain catalogue searchability (e.g., metadata management, search optimization, conversational AI)				√	√
Pursue syndication and licensing opportunities					√
Engage in award campaigns and industry recognition efforts					√

Support agencies

Support agencies include funders or other agencies that develop mechanisms that provide direct support for production and promotion. They are important stakeholders in making content, enabling discoverability, bridging funding gaps for marketing, and stimulating high-potential IP creation and retention. In Canada, support agencies would include the Canada Media Fund, Telefilm, FACTOR, Musicaction, as well as provincial organizations such as Ontario Creates, SODEC, Creative BC, etc.

The table below outlines support agencies' assumed or potential actions during the content lifecycle.

Figure 12 – Examples of discoverability actions – support agencies – audiovisual

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Create and administer development funds	√	√			
Create and administer incubation labs/workshops	√				
Evaluate IP	√				
Fund local markets and festivals	√	√		√	√
Fund access or travel to international markets	√	√		√	√
Host and support pitching workshops and industry training	√	√			
Administer tax credits			√		
Promote funded projects				√	
Offer and administer marketing support for funded projects				√	

Figure 13 – Examples of discoverability actions – support agencies – audio

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Create and administer artist development grants	√	√			
Provide incubation programs, artist residencies, and other collaborative industry training	√	√			

Create and administer production/recording grants and tax credits		√	√		
Fund local music festivals and showcases		√		√	
Create and administer marketing and promotion funds		√		√	
Provide tour support and live performance funding		√		√	√
Fund access to export showcases and international markets		√		√	√
Promote and showcase funded projects				√	√
Create and support music award programs and recognition					√
Support music industry advocacy and policy development		√			√

Industry

Industry includes stakeholders within the audio and audiovisual sectors that contribute to discoverability at an institutional level (excluding regulators, distribution services, and support agencies). This group includes industry associations, festivals, award organizations, and other entities that promote content through public and industry recognition and engagement.

The table below outlines industry's assumed or potential actions during the content lifecycle.

Figure 14 – Examples of discoverability actions – industry – audiovisual

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Fund local markets and festivals	√	√	√		
Fund access or travel to international markets	√	√	√		
Develop and support film/TV tourism campaigns				√	√
Develop and support national/regional campaigns that promote local or regional content (e.g., MADE NOUS)				√	√
Award nomination				√	√

Figure 15 – Examples of discoverability actions – industry – audio

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Fund and organize local music festivals and showcases	√	√			
Host industry conferences and events	√	√			
Develop and support national/regional music promotion campaigns		√		√	√
Award nominations and recognition					

Advocate for industry interests and policy development		√			√
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Audience

As the consumers of content, audiences play both a passive and active role. They watch or listen to content, but also actively contribute to discoverability through word-of-mouth, social media sharing, critique/review, and other forms of engagement and discourse.

The table below outlines audience’s assumed or potential actions during the content lifecycle.

Figure 16 – Examples of discoverability actions – audience – audiovisual

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Support crowdsourcing initiatives		√			
Generate interest/buzz		√	√		
Engage in public discourse/word-of-mouth recommendations		√	√	√	√
Create user-generated content (e.g., posting on social media)				√	√
Write or engage in rating and reviewing				√	√
Attend events (in person or online)					

Figure 17 – Examples of discoverability actions – audience – audio

Discoverability Actions	Ideation and Development	Financing and Partnerships	Production	Launch	Post-Launch and Catalogue
Contribute to artist concept validation through social media interaction	√				
Support crowdsourcing initiatives		√			
Fund artists through direct support platforms (e.g., Bandcamp, Patreon, pre-orders)		√	√		
Contribute to collaborative music creation (e.g., fan duets, covers)			√	√	
Support word-of-mouth buzz and sharing across platforms, buy and wear merch				√	√
Create user-generated promotional content and playlists				√	√
Attend live performances and events				√	√

3.3 (Early) Market intelligence

Early market intelligence turns creative intent into testable opportunity: identifying target audiences, mapping comparables and competition, gathering audience demand signals to facilitate securing funding and financing, and creating early-stage discoverability actions. By validating who the work is for, where it can live, and how it should be positioned and priced, teams de-risk greenlights and shape projects for discoverability from day one.

Audiovisual market

During consultations, funders and broadcasters stressed the value (and financial challenge) of audience scoping, piloting or proof-of-concept development, and testing before greenlighting. When used, these tools not only validate an idea, but also can support decision-making at key moments within the content lifecycle. The first moment occurs during the first two phases (Phase 1 – Ideation, Development, and Validation; Phase 2 – Financing and Partnerships) where market intelligence can inform the format and scope, tone, casting, platform and audience fit, budget, and potential partners. Audience validation also facilitates securing financing: partners are investing in audiences/fandom more than content itself. The second moment is at Launch (Phase 4), when this information can help to determine where and how to premiere and launch, how to package, metadata vocabulary, and marketing spends and channels.

In practice, for Canadian broadcasters and producers, there are often very few resources for sophisticated market research or testing, before or after a project is produced. Although some Canadian funders support market research initiatives, this assistance is sporadic and typically embedded within development or marketing envelopes rather than as a stand-alone “early intelligence or audience research” funding program.

Audiovisual streaming services and film distributors noted that they have greater access to market research and analytics. In fact, streaming services shared in consultation that they use audience viewing patterns to not only shape marketing strategies, but also to

inform how content is written, structured, and produced in order to maximize engagement. For example, they can see where audiences are replaying moments in season one of a show and introduce similar moments in subsequent seasons. They often share these findings with producers in the early stages of production to help guide content.

Overall, audiovisual stakeholders across the value chain say market insights are valuable, but difficult to finance consistently.

“Early intelligence doesn’t just ‘inform,’ it can reconfigure what we make, who we make it for, where and when we release it, and how we package and measure it.”

- Canadian broadcaster

Resourceful producers and rights-holders with vast catalogues may post older content on third-party platforms like YouTube to not only reintroduce that content to audiences but to also use engagement and analytics to develop new content. By analyzing engagement (e.g., views, likes) and viewer comments on older content they can access valuable guidance on how to shape new content and engage those same audiences. Content creators and broadcasters have also tested developing short-form or low-budget content around specific concepts, stories, or characters and using engagement findings to inform future, larger-scale projects. Tools like Comscore are also highly coveted by marketers and distributors in understanding consumer trends and audiences and determining what audiences may want to see.

Audio market

Early market research seems more likely to happen in audiovisual than in audio, where consultations revealed that Canadian independent labels tend to prioritize the artist’s vision and often do not want market trends to interfere with the creative process – else

they find themselves chasing fast-moving trends. In some cases, though, artists have already done the early-day work of developing their own brand and fandom that aligns with the music they create and can help inform the creative process.

Research validates the idea that artists are increasingly using social media as a “sounding board,” or a market validation tool. Musicians will often “pilot” short snippets of songs in their social media content (e.g., dance videos, snippets of live shows, footage of recording process) in order to identify which songs generate the strongest engagement and/or user-generated content (Nwagwu & Akintoye, 2023). This process effectively allows artists to perform market testing in real-time to make more informed choices about what songs to promote, position as lead singles, or even to finish producing, while also building audience excitement and wider discoverability for their future release.

Live shows, like social media, also provide a real-time forum for artists to “market test” new material and approaches to see how they are received in the room. Meanwhile, funding bodies such as FACTOR now recognize digital ad spends and tools (e.g., Chartmetric subscriptions) as eligible costs, signalling support for data-driven market development (FACTOR, 2025).

3.3 Maintaining interest

Maintaining interest has two dimensions. Pre-launch, once the initial spark is created through early audience development, stakeholders must keep anticipation and the conversation alive at each phase so that momentum compounds towards release. Post-launch, interest must be managed across multiple windows and through to catalogue, while laying the groundwork for the next project so audiences do not have to be rebuilt from scratch. **In practice, this means treating engagement as a continuous process that bridges campaigns, formats, and cycles, sustaining attention today and seeding demand for what comes next.**

All types of stakeholders consulted signalled that the challenge of discoverability is not limited to the launch phase or release week, and maintaining audience's longer-term interest in content is key to success. There is a sector-wide lack of consideration and funding for post-release or catalogue promotion, festival strategies, and long-term audience-building.

Audiovisual market

In the audiovisual sector, windowing across platforms poses a challenge to maintain audiences' interest in a piece of content throughout the content lifecycle. This is especially true in the case of one-off content formats. Typically, with feature films, there is a conversational gap between the theatrical release and broadcasting or even streaming – there is no mechanism or invested player to ensure or oversee continued audience engagement between theatrical exhibition and broadcast, or streaming. Additionally, producers generally have very limited budget and capacity to do this work. This means that when there is a significant period between theatrical release and broadcast/streaming, marketing has to start “from scratch” to raise awareness about the broadcast/streaming of a film. Streaming services are more likely to distribute original content concurrently with theatrical release to leverage audience awareness across platforms. Broadcasters tend to devote very little marketing to one-time appointment screening, unless it is within the context of an ongoing program that features one-off content forms. Consultations emphasized that it is increasingly important for all those with an ownership interest in a feature – whether fiction or documentary – to have a defined role in generating measurable engagement throughout the entirety of the content lifecycle.

In the case of series, while lengthy time periods between seasons can pose challenges, broadcasters and streamers use similar strategies to maintain and/or re-initiate audience engagement around new seasons. This might include press, announcements around casting, shooting, and/or expected release dates well in advance of new seasons as well as re-broadcasting of previous seasons leading up to the new release. In each case, the

focus is on capturing audience attention around “well-loved,” or at least “known,” content. These tactics can also work for older series, in the case where there is confirmed audience interest and opportunity to engage with that audience around an anniversary related to the show, a world event, a renewed interest in a lead actor, writer, director, or even in the subject or style of the show.

Critical to maintaining interest and re-circulating older content is IP ownership and chain of title. Canadian producers continually seek sales for “back” catalogue content that is likely to re-experience demand. This may be related to a significant anniversary or life-event of a well-known actor attached to the content, a world event that reinvigorates the relevance of the programming, or a resurgence in interest for a topic, style, or type of content. When producers own the content and are engaged with the audience or community of interest relative to the content then they are in a better position to negotiate distribution agreements with broadcasters and streamers.

Similarly, broadcasters and streamers indicated that they tend to invest greater resources in content that they own – for the same reasons as the producers and creators of content: where there is ownership, and once all financial obligations relative to production are met, there is opportunity for sales and profit. Where broadcasters and streamers once required world rights, there appears to be opportunity to explore more flexible models where rights (and the risks associated with investing in and then marketing new content) are shared across multiple parties. This approach may include sharing rights with production companies, and/or with other broadcasters and streamers, either temporarily and/or geographically.

Both broadcasters and streamers regularly acquire already completed content, which may be newer or older. Acquisitions are a much smaller investment than original content and pose less risk as there will be some audience data and information available regarding audience and, in the case of features, festival success. Streamers have more opportunity to integrate older back-catalogue content as they are not held to a prescribed schedule and in fact are organized to deliver content to niche audiences

(rather than the many, as traditional broadcasters do). Streamers also have the capacity to integrate catalogue content into their recommendation systems to feed existing audiences with an interest in the content as well as employing audience development efforts to attract new audiences – in both cases, this often leads to new audiences for the content. Recommendation systems and algorithms are explored further in Section 5.

Some producers noted that it is difficult to sell their older content to new platforms when they are not the sole rights-holder. This can potentially mean significant legal undertaking for Canadians who need to negotiate with other rights-holders, sometimes large companies. There are also the technical costs of re-formatting older programming for newer platforms, which may be prohibitive for individual rights-holders. Therefore, many Canadian rights-holders with valued IP are motivated to resurface their content on newer platforms; however, they may not have the resources or the sole ownership to follow through.

Ultimately, the owner(s) of the content steers resurgence and whether the work will re-enter the market or disappear into obscurity. With proper stewardship of IP, restoration, platform distribution, and strategic marketing, catalogue content can be re-discoverable. Maintaining interest is also tied to proper catalogue and data stewardship, ensuring that older works are properly tagged and can be found online and on search engines, which is further explored in Sections 4 and 5.

A slow build: Little Bear

Little Bear is a Canadian children's animated series that follows the title character and his friends' adventures. The series ran for five seasons, from 1995 to 2001, and was co-produced by Nelvana/Corus and the CBC, and was based on a children's book series. Little Bear was popular with children both in Canada and abroad. The series was distributed in the US by Nickelodeon and CBS, and aired in Australia, Ireland, New Zealand, and the UK.

In recent years, Little Bear has resurfaced as part of conversations around the "gentle TV" or "slow TV" trend, where parents of young children are seeking out older content that is slow-paced, with muted colours and sounds. Older children's content is perceived as less stimulating and frenetic than some more recent children's programming.

Articles, lists, and online communities highlight Little Bear as a prime example of slow TV, citing its calming music, slow-paced storytelling, and simple themes around friendships and family. The series is also attractive and nostalgic to millennial parents, who may have watched the show as young children and can now share it with a new generation.

Corus has played a role in maintaining interest in Little Bear by resurfacing it across platforms. In 2014, they released all seasons on the OfficialLittleBear YouTube channel, where individual episodes have a minimum of one million views. The Little Bear Movie (2001) is also on the YouTube channel and has 23 million views. In 2021, Little Bear was added to Paramount+, furthering its reach and revival.

Little Bear's resurgence, marked by strong audience engagement, online discussions, and high visibility, demonstrates that Canadian owned and controlled IP – told through universal stories that embrace their core value and supported by strategically marketed and distributed – can deliver value over time.

Audio market

In the audio sector, strategies are continually being pioneered to maintain audience connection. The democratization of music distribution and online discoverability tools has created a new challenge: while artists can more easily reach audiences online, building sustained fandom from individual song exposure has become increasingly difficult in an overcrowded market (Cirisano, 2023).

Touring, live shows, and festivals are established ways for artists to build and maintain audience interest. Live performances are a rare outlet where artists can create direct, unmediated connections with audiences outside of platforms and sell their product. However, consultations emphasized that the traditional marketing ecosystem that once supported live touring and album sales (e.g., local radio, record store displays, local media tie-ins) has largely disappeared.

Artists tend to appear increasingly frequently on social media, regularly posting multiple times a day on platforms like TikTok and Instagram. This effort will often focus around a pre-release strategy, whereby artists and their teams will work backwards from an album release to create content that builds momentum and excitement (AMW, 2025). K-pop (Korean pop music) is notable for its use of sophisticated pre-release strategies that build not just excitement about new music, but also image and brand equity (Jae-heun, 2025).

However, the need for a constant presence is not just about promoting new releases; it is about survival and sustained audience engagement in a crowded attention economy. Artists that want to break through will create a steady stream of content, from album previews and live-show footage to more casual, authentic everyday content like vlogs and lip-sync or dance videos to maintain a two-way conversation with their audience (IFPI, 2025). This ongoing content creation loop helps artists avoid disappearing into the crowd on social media, but, as many participants noted during consultations, social content creation becomes a burden for many artists. Audience engagement requires a

significant investment of time, energy, and money on the part of the artist, and it can easily divert resources away from the actual work of making music.

“Not all artists want to be content creators and they should not do it in an inauthentic way.”

- Social media platform

When they are able, artists also use touring (as main or supporting act) to maintain interest, especially following a major release. Live performances, broadcast variety shows, news segments, and social media also provide a real-time forum for artists to stay connected with audiences.

A durable way to sustain the long-term conversation is purposeful catalogue stewardship: preserving works so they remain playable and legible to platforms, and planning re-discoverability moments like anniversary campaigns, re-masters, and timely re-releases when unexpected virality strikes (Steiner, 2025). Practically, this means maintaining SEO and structured artist pages and long-tail marketing that pairs editorial pitching and playlisting with refresh content (edits, acoustics, remixes), as well as creator toolkits for social media content. Artists, labels, and publishers can keep track of audience data and, when a spike occurs, can activate a rapid response to convert social interest into searches, saves/follows, and sustained streaming.

3.4 IP strategies and competitiveness

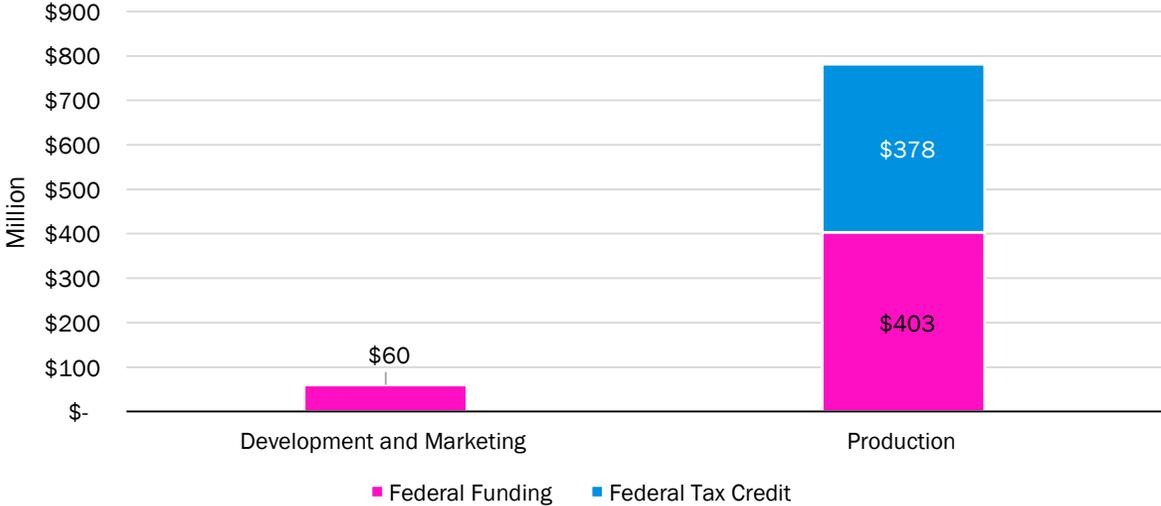
Audiovisual market

Strong IP is central to a strategy producing high quality and compelling content in the audiovisual sector. Books, short stories, podcasts, plays, web series, and other creative content can be used as a valued source of IP and as a means of leveraging an established audience. Successful Canadian television programs like *Kim’s Convenience*, *Murdoch*

Mysteries, and Heartland demonstrate this strength as each was developed through different existing IP. Murdoch Mysteries and Heartland, both long-running series, were originally book series, one focused on period detective stories and the other on western sagas and horses. Kim’s Convenience started as a stage play centred on the immigrant experience and running a convenience store.

A central challenge to developing and adapting IP is funding. In Canada, audiovisual funding is primarily focused on production, with fewer resources and less emphasis on development or marketing. The chart below demonstrates a high-level estimate of federal support for content production, including federal tax credits, versus development and marketing funding in 2023/2024.

Figure 18 – Estimated federal support for audiovisual content production and development and marketing in Canada, 2023/2024



Source: Nordicity, “The Digital Media Universe in Canada: Measuring the Revenues, the Audiences, and the Future Prospects,” 2025

While production funding is essential, there is significant opportunity to invest more strategically in content and audience development. Taking concepts to market that are more fully developed and where audience interest has been confirmed puts producers and content creators in a stronger position to retain ownership and control of their IP,

while enhancing marketing and promotion early in the production lifecycle. Early investment to ensure content has an audience improves producer and creator access to the financing needed for content production as well as for the almost continuous marketing and promotion required to engage audiences. The need for early investment was supported throughout consultations, with various participants saying that when it comes to the production lifecycle, Canadian financial supports are focused on funding the making of content – both audio and audiovisual. The sentiment from industry was that development, marketing, promotion, and sales costs are poorly supported and generally de-prioritized.

Typically, at least a portion of IP ownership migrates from Canadian rights-holders to broadcasters, streamers, or distributors as part of production financing deals. In the CRTC's What We Heard Report on Defining Canadian Content, content ownership was viewed as fundamental to allowing Canadians to fully reap the economic benefits of their work; yet, giving up ownership rights is often required to secure content-specific development and production funding. In giving up ownership rights, creators gather the financing to make the content in exchange for marketing and distribution of their content, while forfeiting the long-tail revenue and potential future earning power of their content.

Three Pines: Canadian origin, global adaptation

Three Pines is a 2022 Amazon Prime Video mystery series adapted from Canadian author Louise Penny's bestselling novels featuring Chief Inspector Armand Gamache. Set in the fictional village of Three Pines, inspired by Quebec's Eastern Townships, the series blends Canadian settings with the style of the British "whodunit" mysteries.

In 2020, UK-based Left Bank Pictures, owned by Sony Pictures Television, optioned Penny's 18-book series and partnered with Amazon Prime Video. Filming began in 2021 in Quebec, with Alfred Molina cast in the lead role. While the series was shot in Canada with Canadian talent and crew, it is not considered a Canadian-owned production as ownership and key creative control were held by non-Canadian entities.

Following its debut, Three Pines received positive reviews, including praise for its realistic depictions of Indigenous stories, and was among the top 10 shows and movies on Amazon Prime Video in its debut week. Penny's novels, already internationally recognized, provided a loyal fan base for the adaptation. The series was available in multiple international markets, including the US, Canada, UK, Ireland, Australia, New Zealand, and the Nordic countries. The international reach and visibility were greatly enhanced by Amazon and Left Bank Pictures' global marketing and distribution capabilities, illustrating how foreign ownership can sometimes make Canadian IP more discoverable to audiences worldwide.

Despite its success, Three Pines was cancelled after its first season, reportedly due to Left Bank Pictures and Amazon Prime Video being unable to reach an agreement for continuation, prompting a Change.org petition with over 7,000 signatures calling for its renewal.

In comparison, the 2013 Canadian TV movie *Still Life: A Three Pines Mystery*, adapted from two of Penny's novels and produced by CBC, was primarily distributed domestically and had a much more limited international audience. While other factors related to production value and even the notoriety of the author (which may have evolved between 2013 and 2022) should not be dismissed, the contrast between the two productions of the same source material highlights a key trade-off surrounding IP ownership. Partnerships with well-resourced international streamers can expand audience reach but may not provide the same opportunities for companies to develop long-term ownership and franchise capacity.

From the streamers' perspective, some noted their business is based on content they own and that is aligned with particular brands and/or a language market. They assert that Canadian content-related regulations regarding IP ownership and language markets do not align with their business model. Other streaming platforms raised the same concerns, noting that owning IP is essential for them as a means of earning revenue and exporting globally. At the same time, they expressed an openness to flexibility around ownership models. Both broadcasters and streamers noted value and opportunity in partial ownership and control of some content; this allows them to share the risk of investing in original content with the producer or creators. It also means they may benefit from the producers' and/or creators' audience connections.

Across the broader Canadian industry, strategic IP investments allow creators to cultivate audiences early in the creation process through things like online followings, proven fan bases, or festival success. With an established interest and audience, rights-holders and creators may gain more leverage to negotiate financing and/or sales with broadcasters and streamers. Long-tail revenue post-launch from second and third windows as well as catalogue sales contribute to build stronger, more resilient companies that have the financial strength to invest in future content and audience development.

Critical to the policy objectives of the *Broadcasting Act*, fostering Canadian ownership and control of content anchors Canadian stories in their place of origin, resulting in authentic, community-connected content. For that content to succeed locally, nationally, and internationally, support for market export preparedness is also required. This work, in turn, begins at the development stage where audience and content are developed together. This kind of support provides validation for creators and helps secure future investment and demonstrate IP's true potential.

Letterkenny: Canadian IP champ

The concept for the Letterkenny series began with an anonymous Twitter (now X) account by Jared Keeso, where he and a friend humorously embellished the problems one may encounter in his small hometown of Listowel, Ontario. The account gained local attention, and it inspired Keeso to adapt the material into short YouTube videos. Launched as Letterkenny Problems, the YouTube channel quickly amassed millions of views and gained enough notoriety to be nominated for Best Original Fiction Program or Series Created for Digital Media at the Canadian Screen Awards in 2014.

Building on this proof-of-concept, and a partnership with production company New Metric Media, Letterkenny was commissioned as Crave's first original series in 2015. The sitcom, which followed the adventures of characters residing in the fictional town of Letterkenny, Ontario, ran for 12 seasons until 2023.

Although the show initially struggled to secure US distribution, the producers leveraged their merchandise sales data from American residents to demonstrate a market demand and reached a deal with Hulu. The success of the original IP has paved the way for numerous expansions and spin-offs. The most notable example is Shoresy, which follows the minor Letterkenny character Shoresy (played by Keeso) as he joins a minor league hockey team in Sudbury, Ontario. The decision to centre the spin-off around Shoresy was again driven by merchandise sales, as products associated with the character were among the best-selling.

Beyond the spin-off, the Letterkenny brand has created ancillary products and content like tours across North America, merchandise, podcasts, and even a video game. In 2023, New Metric Media re-acquired the international distribution rights for

Letterkenny and Shoresy and entered a licensing deal with Netflix in several European territories.

Letterkenny is unapologetically and authentically Canadian, embracing its Northern Ontario setting and incorporating colloquialisms, accents, and scenarios from Keeso's own life. Despite this specificity, it resonates with global audiences and critics because of its sharp humour, high quality, and authentic portrayal of small-town life. People around the world can identify with growing up in similar places, with similar characters. Much like Trailer Park Boys, which has also successfully spun off into multiple projects with global success, Letterkenny demonstrates the value, and power, of cultivating and leveraging Canadian IP.

Audio market

The IP issue plays out differently in the audio sector. Between federal funding through FACTOR and Musicaction, development programs like the Canadian Starmaker Fund and Fonds RadioStar, provincial granting bodies and industry associations, and various broadcaster-led and other industry initiatives, Canada has built a robust artist development and export development ecosystem. This infrastructure has seen Canadian artists shine on the global stage, as evidenced by Canada's position as the third-highest music exporting market in the world (Luminate, 2024).

However, as the most successful Canadian artists grow into global stars, they will often "outgrow" the domestic industry and sign with US-based labels, posing a major IP retention issue: the greatest successes with the greatest return on investment made by Canada's artist development ecosystem often accrue to foreign entities (The Manager's Playbook, 2025). This manifests as a sort of creative "brain drain" as Canadian artists scale up in their careers. Several consulted parties in the music industry discussed how high-profile artists like Justin Bieber, The Weeknd, and Tate McRae, or hit-making producers such as Cirkut, become Canadian success stories, but their commercial rights

are managed through US-based major labels rather than flowing through the Canadian industry. In the long run, those creators often then end up moving to the US to avail themselves of the opportunities in the US music industry.

Consultations highlighted that the MAPL system, which defines what makes a song Canadian, can sometimes compound this issue: when Canadian artists take important career steps to collaborate internationally or record outside of Canada, their work often loses “Canadian content” status. Once the artist reaches this point, the very broadcasting entities that paid into the funding ecosystem to support their development cannot champion them as part of their presentation of Canadian content, which can create tension when those same artists are being wrapped in the Canadian flag at national events like the Juno Awards. This is not a simple problem to solve, but addressing it will require supporting artists to scale globally from within the Canadian industry, exploring incentives to retain talent, and facilitating partnerships with foreign entities that do not result in losing artists entirely.

Keeping country Canadian: Josh Ross

Country artist Josh Ross is one of many recent examples of Canadian artists that appears to have outgrown the Canadian industry as they find growing international success. Ross made history in 2025 as the first Canadian in 30 years to top the US country radio charts, joining only Paul Brandt and Hank Snow, and accumulated over 1 billion global streams in the process (Music Corporation of America, 2025). He also earned touring slots with Luke Bryan and Nickelback and a debut at the Grand Ole Opry in Nashville (McClintic, 2025).

What makes Ross unique among the growing list of international music stars hailing from Canada is that Universal Music Canada joined forces with Universal Music Group Nashville to sign him, meaning that he retains a strong connection to the Canadian music industry (Anderson, 2023). While the practical implications of this partnership are not well-known, he functionally has teams in both Canada and the US to drive promotional efforts and other opportunities in both markets. Josh Ross holds a unique position as a bridge between the Canadian and American country music industries, and demonstrates a tailored approach by Universal to maximize his success on both sides of the border.

3.5 Structural strategies: media ownership and discoverability

Foreign-owned media plays a central role in how Canadians access, discover, and consume content. This is not a new phenomenon, as Canadian film and television has always competed with foreign content, primarily from the US. However, the rise of global streaming platforms has intensified this dynamic by increasing the volume and variety of foreign content available to Canadian audiences. These platforms offer enormous global content libraries, which both hinder domestic content discoverability and create opportunities for Canadian content to reach international audiences. Historically,

Canadian audience, and Canadian broadcaster, relationships with foreign content have evolved differently in the French- and English-language markets.

For French-language Canadian-owned broadcasters, the demand for French-language Canadian content, and more specifically for Québécois content, is strongly rooted in cultural and linguistic identity supported by long-standing provincial government policies and programs intended to broadly normalize and support both the use of the French-language and the creation of cultural products. These policies and programs contributed to the development of a “star-system” within the audio and audiovisual industries: an environment where Québécois audiences, and to a certain extent French-language audiences across Canada, actively engage with content featuring Québec-based performers and content made by Québec-based creators. In the 1970s, the province introduced incentives to enhance the local dubbing industry for foreign film and television content resulting in a significant portion of foreign audiovisual content on French-language television in Canada broadcast using Québécois performers (Sabino-Brunette). Today, international streaming services provide content in its original language, in some cases with dubbed versions, and in all cases with subtitling options.

Audiences in Québec, as elsewhere, are shifting to online streaming services to find and watch audiovisual (Canada Media Fund, 2024). This shift is especially apparent among younger people: a recent study by L’institut de la statistique du Québec notes significant differences in how younger generations discover and engage with content. This behaviour includes language preferences: 59% of those 15 to 29 years of age generally watch content in its original language (with subtitles as needed), while just 26% generally watch in French while the inverse was recorded for those 65 years of age and older. Within the 15 to 29 years of age group, 30% never watch Québec content in French, the highest percentage among all age groups. The same study notes a growing use of English by Francophones to search for cultural content online. In the case of those 15 to 29 years of age, 45% principally use English while 25% principally use French for internet searches about films and series (Institut de la statistique du Québec, 2024). These results have been the subject of much public debate within the context of reports demonstrating

the decline of French language usage in both social and work settings (Institut de la statistique du Québec, 2025; Office québécois de la langue française, 2024). Bill 109, *An Act to affirm the cultural sovereignty of Québec and to enact the Act respecting the discoverability of French-language cultural content in the digital environment*, introduced in May 2025, is intended to support access to and foster the use of French-language content. Within the context of cultural and linguistic sovereignty, the value that communities place on the ownership of content distribution systems is instructive.

In Canada's North, following the introduction of television in the late 1960s, Inuit political organizations, collaborating with academic researchers in 1970s and 1980s, advocated for federal policies and programs to support audiovisual activity led by Indigenous people. Recognition of Indigenous peoples in the 1991 *Broadcasting Act* was key to the development of Indigenous ownership of both audiovisual content and distribution platforms. The year 1999 saw the establishment of the Aboriginal People's Network (APTN), the first national Indigenous broadcaster in the world. Subsequently, 2018 saw the creation of the Indigenous Screen Office, responsible for developing the Indigenous audiovisual production sector, which today administers the funding envelope for Indigenous production previously managed by the Canada Media Fund. Both of these national Indigenous organizations, through their policies and practices to prioritize Indigenous creators and Indigenous-owned production companies, have facilitated and continue to enhance opportunity for First Nations, Métis, and Inuit people to tell their own stories. In 2024, APTN, a combined English, French, and Indigenous language network, added a second channel: "APTN languages" is available across Canada, providing content in 18 Indigenous languages. In 2025, UvagutTV, an Inuktitut TV channel licenced by the CRTC, was launched. Ownership of the structures that fund, develop, distribute, and market audiovisual content has played a critical role in fostering cultural and linguistic sovereignty of First Nations, Métis, and Inuit people in Canada.

French-language communities across Canada have also sought ownership and control of content and distribution platforms. These efforts have supported calls for increased access to French-language programming generally, in addition to increased opportunity

to produce audiovisual content for French official language minority communities (OLMC) by creators from those communities. Over the past twenty-five years or so, federal policies have facilitated access to French-language content and funding programs have increased their investment in OLMC-led and -owned content. Among these efforts are Canada's participation in the TV5, a group of French language broadcasters, and TV5Monde (an international online offering) through TV5 Québec Canada. This arrangement facilitates the production and distribution of Canadian French-language content internationally and provides a range of international French-language programming to Canadians. In 2014, it launched Unis TV, a channel devoted to content for and made by French-Canadians across the country. In 1999, ten French-language producers from across Canada gathered to establish the Alliance des producteurs francophones du Canada (APFC); today, the organization has 28 production company members located across six provinces and one territory, and their productions are screened in Canada, in Québec, and around the world.

Situated next to the English-language juggernaut of the US, the market dynamics in Canada's English-language audiovisual broadcast market represent a different sort of challenge to cultural sovereignty. For English-language Canadian-owned broadcasting platforms, English-language foreign content has long tended to attract more viewership than Canadian content (as noted in Section 2.4). Through consultations, Canadian broadcasters confirmed this continues to be the case, in addition to requiring a smaller financial investment.

English-language Canadian broadcasters noted that promoting US-owned, acquired content is generally easier and more cost-effective than promoting Canadian content because of the "bleed over" of American media and publicity into Canada. Canadian audiences are often already aware of US programming before it even becomes available domestically – by contrast, when promoting Canadian content, broadcasters noted they are building audience awareness from "the ground up." They also stated that audiences today are not loyal to broadcasters or platforms, but rather to specific content or IP. As a

result, broadcasters have shifted their marketing focus to titles, preferably ones that already have audience awareness, which are often foreign-owned and -made.

Historically, Canadian BDUs relied on vertical integration to control the content value chain, from development and production to distribution and promotion. As audiences shift away from linear broadcast, and BDU dominance fades, some broadcasters are finding it less effective to rely on their internal networks to reach viewers. Several noted that while it is possible to move audiences from linear to their online streaming service and/or their YouTube channels, it is virtually impossible to move audiences from streaming services back to linear – and those watching on YouTube generally do not move to other platforms. Notably, broadcasters talked about finding talent via YouTube content creators and working with that talent to develop their creative skills for long-form content on television and/or their streaming service, but doing so without the expectation that a significant portion of the talent’s audience will necessarily move to the new platform. That audience will primarily serve as a community of interest or network contributing to create “buzz” around the content on the linear or streaming platform.

Today, Canadians are increasingly depending on foreign-owned streaming services, social media platforms, and search engines to search for, find, and watch content. As a result, BDUs themselves now invest increasing amounts of their advertising budgets in foreign-owned social media and search engine platforms. At the same time, Canadian advertisers are investing less in television ads and more in foreign-owned platforms. This trend is likely to continue as streaming services introduce more ad-supported tiers.

“There is really only one viable Canadian streaming service in the [audiovisual] market. Our culture is at risk if we only have one Canadian-owned streaming service within our ecosystem.”

- Broadcaster

Across consultation, stakeholders raised concerns over this shift and the dominance of foreign-owned companies, as well as the implications for the Canadian media sector and broader cultural landscape. Funding bodies in particular pointed out that a significant portion of marketing dollars that used to circulate within the Canadian creative economy now flow to American-owned platforms. Online/digital advertising spending has the largest market share in Canada in 2025, making up 63%, with 28% attributed to linear and 5% to out-of-home advertising (CRTC, 2025). Within the Canadian online ad media market, three American tech companies – Google, Meta, and Amazon – reportedly own 90% (Winseck, 2024). There has also been recent reporting that attributes job losses in Canadian traditional media to increasing revenue leakage to foreign platforms (Canadian Media Means Business, 2025). This situation could be especially concerning for news discoverability, as Canadians have had the content of Canadian news providers blocked on Meta-owned platforms following the passage of the *Online News Act*. Additionally fewer advertising dollars flowing to Canadian broadcasters and news services is contributing to smaller budgets for investment in Canadian programming, including news.

4. MARKETING AND PROMOTIONAL TACTICS

Having outlined lifecycle considerations, this section details the tools and tactics stakeholders deploy to turn intent into audience. First, we put the focus on promotion: the ongoing conversation creators and partners build with audiences to maximize the chances that content is seen and consumed.

Consultation participants from all areas of the audiovisual and audio industries converged on the same premise: marketing and promotion are now multi-platform, always-on disciplines. There is no one-size-fits-all playbook; strategies must be audience-first, content-focused, segmented, and iterative. The sub-sections that follow examine tactics across earned/owned/paid media, influencers, and community activations in addition to festivals and events. The goal is straightforward but demanding: keep the right audiences engaged from first tease through to the long tail, balancing authentic human storytelling with the realities of algorithmic discovery.

4.1 Roles, responsibilities, capacity, and resources

Because “discoverability” means different things to different stakeholders, roles and responsibilities are often blurred, misunderstood, or anchored in legacy practices that may underperform in a digital, multi-platform environment. This subsection examines which stakeholder does what to market and promote content, how this structure is evolving, and what it takes to do it well.

Audiovisual market

Roles and responsibilities for marketing and audience discoverability are highly context-dependent and perspectives, especially in the audiovisual market, often diverge. The result is inconsistent expectations and, too often, gaps in communication about who is accountable for what across stakeholders.

Historically, in the linear era, Canadian producers and creators handed over a portion of their ownership interest to broadcasters and distributors in exchange for financing and managing marketing and promotion. The producers or creators had few responsibilities beyond facilitating photo shoots, facilitating quotes from talent, and presence for press and events. In today's saturated, social-first environment, producers and creators are now expected to supply, and often originate, a wide range of assets and activations – not only photos, but behind-the-scenes video, cast interviews, short-form teasers, creator Q&As, and more. Marketing has become far more involved, yet marketing budgets have not kept pace with the additional work and costs required to create and sustain these online assets.

In consultations, producers described a mixed picture. Many do still rely on broadcasters, streamers, and/or distributors to orchestrate marketing and promotion, and some report genuine collaboration. Yet a common view among broadcasters and distributors is that producers should generally concentrate on the creative while they handle promotion. Producers noted, however, that they understand the importance of early and continued audience engagement. Some would like to take a more active role, arguing they know the work and its target audiences best and are highly motivated to see it succeed. A labour organization representing creatives noted that members' promotional input is often undervalued or sidelined and only considered useful when the creator is "high-profile." Producers and creators argue that their audience understanding and connections are critical to engagement. Limited budgets and restricted access to promotional opportunities leave many producers and creators with little real opportunity to participate in marketing and promoting their stories.

In other scenarios, independent producers feel that a heavy burden of marketing and promotion work is put on their shoulders by broadcasters – with no additional budget to hire the necessary expertise. With the exception of larger production companies, most Canadian production companies do not have in-house marketing teams or expertise, nor the funding to support that work. In some cases, producers feel broadcasters do not prioritize the promotion and discoverability of the independent original content they

commission. Despite the criticism of broadcasters, Canadian independent producers also acknowledged that broadcasters do not have appropriate funding for promotion and marketing. As illustrated, the roles and responsibilities between producers and Canadian broadcasters can vary and are not at all consistent.

What is clear among stakeholders is that there are fundamental and systemic challenges with discoverability and marketing within the Canadian domestic ecosystem. One systemic issue are the labour cuts and the dissolution of marketing departments across broadcasting companies, which have impacted broadcasters' capacity to market. Producers also emphasized that the Canadian funding structure does not allow for sufficient marketing and promotion. Some noted that the CMF can be restrictive when it comes to what constitutes discoverability and marketing eligible costs. Others in the industry observed that "discoverability plans," though routinely required for funding, can devolve into a "box-ticking exercise." Even when approved, plans are often only partially executed because marketing allocations are rarely safe-guarded and are re-allocated to cover production pressures. In some cases, projects proceed with reduced financing, leaving too little to implement the original plan. A related issue is budgeting practice: marketing is frequently compressed into a single line item, whereas best practice would itemize and properly cost specific marketing and discoverability initiatives across the production lifecycle.

Streaming services reported generally collaborative relationships with Canadian producers, noting that marketing discussions often begin at the outset of production. They indicated that they share select analytics to help producers shape projects for maximum audience appeal and emphasized that promotion and discoverability are core priorities. Producers, for their part, offered fewer comments on streamer collaboration, as many have not worked directly with foreign services. Those who had experience appreciated the early focus on discoverability. Larger production companies also underscored the need to clarify roles and responsibilities in licence agreements with streaming services. It should be noted that the global brand and resources of foreign services can stimulate audience interest, as illustrated in France, where French films

financed by foreign streaming services tend to have more successful theatrical run (when released theatrically) than the rest of French feature productions (Arcom, CNC, 2025).

Canadian representatives of foreign-owned streaming platforms emphasized that their marketing resources are limited (in the Canadian market) and that, within their respective companies, Canadian titles compete with global content for marketing dollars. When appropriate, streaming services have dedicated Canadian marketing staff focused on promoting content within Canada. Generally, the Canadian team within a streaming organization must advocate for investment in acquisition or production and marketing of their Canadian content. They do so based on their assessment of the quality and potential of the content.

“We are not in the business of acquiring content and burying it.”

- Streaming service

Distributors, thought leaders, and participants with marketing expertise noted that marketing throughout the content lifecycle should be seen as an ongoing conversation. Each relevant stakeholder should build on and amplify the communications efforts of partners throughout all stages of development, production, and release. All partners should share a responsibility in discoverability, but comprehensive collaboration and coordination is still rare. There need to be conversations, from the beginning, between stakeholders over who is responsible for what when it comes to marketing and promotion.

Audio market

Consultations with the industry revealed that discoverability continues to be a shared responsibility across publicists, management, labels, publishers, platforms, broadcasters, artists, and other players in the value chain. The specific configuration depends on the

makeup of an artist's team (if they are signed to a label, if they have a manager or a publicist, etc.), but broadly, the responsibility for driving promotion and prominence does not solely lie with any one entity.

"On a healthy, functioning team, [the discoverability] job is on everybody."

- Record label

Within this ecosystem, streaming platforms provide the infrastructure for artists to exhibit their work and play a secondary role as content curator, otherwise mostly relying on the rest of the supply chain to bring music to their service. Streaming and social media platforms provide tools and points of access to audiences and sometimes get involved with artists through partnerships or other programs, but in general the job of identifying and developing music that people will want to listen to generally remains with labels, managers, and artists themselves. Consultation participants remarked that this distribution of roles has created a dynamic that often resembles the traditional approach to radio promotion, where labels maintain dedicated teams focused on building and maintaining relationships with platform representatives and navigating submission processes. Meanwhile publishers have dual priorities: they are interested in elevating the discovery and promotion of new releases, but they also have an interest in growing the prominence of catalogue music.

The industry's capacity to fulfill promotional responsibilities, especially for independent entities, has been hampered in recent years by resource and personnel constraints. There is a persistent skills and personnel gap on the management side of the industry that is hindering discoverability, as more experienced music industry professionals are leaving the industry due to limited compensation and opportunity (Music Publishers Canada, 2023), including in the French-language market (Nordicity, 2022).

Meanwhile, consultations revealed that independent labels are signing significantly fewer artists than in the past, with development pipelines shrinking as per-artist marketing investments have increased substantially. Consulted parties emphasized that traditional promotional infrastructure has eroded across the industry, perhaps most significantly for genres like folk that once had established broadcasting pathways to audiences. There has been a shift in Artists and Repertoire (A&R) practices toward signing artists who already demonstrate audience traction rather than investing in early-career development (Musosoup, 2025). Furthermore, most independent artists and entrepreneurs cannot afford the full team of professionals needed to effectively cut through the mainstream of music promotion.

“Artists that don’t have a team in place are going to have a very hard time.”

- Music industry association

As discussed in Section 3.3, the democratization of music distribution has also shifted a lot of the responsibility for promotion in the music industry over to artists themselves. Artists are increasingly acting as content creators to promote their careers online, often in the absence of formal artist and/or community management. While this function allows artists more autonomy over their public presentation and more opportunity for overnight success, it also takes a toll on those artists’ mental health and represents a significant investment of time and energy that is not spent making their central product: the music (Wares, Smith, & Teague, 2023). The result is an industry where an artist’s competency as a content creator can determine their commercial viability, and where high-quality music can be easily lost in a crowded market. The situation around driving distribution through self-directed digital marketing is even more complex for non-performing songwriters and composers who may not be as public- or audience-facing as performing artists.

4.2 Evolution of tactics

Marketing and promotional tactics have evolved along with broadcasting landscape, and one-size-fits-all models are longer viable. Each piece of content and each platform have their own dynamics, with specific strategies tailored to different demographics, behaviours, and communities of interest. In the audio sector, for instance, the traditional formula of “make an album, choose a single, promote it through the media” has become outdated, while in the audiovisual sector, festivals, traditional press, and awards, while still important, seem less reliable in connecting with all audiences.

Audiovisual market

Throughout consultations, savvy content producers noted that they are constantly observing audience interest, trends, and world events that they can leverage to quickly develop content that will resonate with audiences. Similarly, broadcasters are more likely to highlight and promote content that resonates with current events and trends. In the case of streamed content, they have more flexibility to add new content at any time as compared to a linear programming grid. Broadcasters noted that the flexibility of their online services facilitates exploration and innovation with content types, formats, and emerging talent. It is a lower risk for experimentation as audiences are not likely to “change channels” if they don’t like a show on a streaming platform; they will try other shows before the “turn off.” Broadcasters are also experimenting by providing the same content across multiple platforms – their own and that of foreign streamers.

Collaborations and partnerships between entertainment and media companies are becoming more common. In a highly competitive and fragmented ecosystem, entities are increasingly working together to achieve the shared goal of attracting viewers and subscribers. There are collaborations and partnerships taking shape in several different forms. One example is subscription bundling, where multiple services are offered together in a single package. Bell Media, for instance, has partnered with Disney to offer bundles that include Disney+, Crave, and/or TSN.

Partnerships are also emerging in production and distribution. A recent case is *North of North*, which brought together Netflix, CBC, and APTN. Initially greenlit by CBC, APTN joined as a partner. The two parties were committed to filming on location in the Arctic, and believed the show had significant market potential, which led to Netflix joining the partnership (Archer, 2025). *North of North* became the most-watched new series on CBC Gem and was a top-performing program on APTN. It was also number nine on Netflix's global top 10 for English-language series in the week of its release. *North of North's* success is highlighted further in the Section 7 case study.

Streamers, particularly Netflix, are increasingly using theatrical releases to promote their original content, and by extension, their services. As shared in consultations, content that receives even a limited theatrical release often performs significantly better once it reaches the platform. Therefore, theatrical releases are both an effectively promotional tool and (expensive) test market, and show partnership between streaming services and traditional exhibitors. Some examples include *Glass Onion: A Knives Out Mystery*, which had a one-week limited theatrical release before it came out on Netflix's platform. Netflix has also recently demonstrated a reverse pattern following the immense success of the animated film *K-pop Demon Hunters*, which premiered on streaming in June 2025. The following August, Netflix released the film in theatres around the world for a one-weekend-only sing-along event. The theatrical release had more than 1,000 sold-out screenings and became Netflix's highest grossing theatrical run, which motivated the release of the sing-along version of the film on their platform (Tudum by Netflix, 2025).

Internationally, new partnerships continue to emerge. In France, private media company TF1 Group, which owns several linear channels and streaming services, has entered into a carriage deal with Netflix beginning in 2026. Through this arrangement, TF1 content will be directly integrated into the Netflix app, including live programming and sports. This arrangement allows streaming services to benefit from access to vast content libraries and broadcasters to expand their audience reach. This innovative partnership may represent a test case for a potential future with merger or carriage deals between broadcasters and streamers.

In a fragmented marketplace, the core tactic is to meet each audience segment where it already spends time, with coordinated, multi-platform efforts rather than a single-channel push. For example, kids' content performs on YouTube because that is where young viewers watch. More broadly, Canadian stakeholders use YouTube for global reach and new-audience discovery. Its recommendation engine can surface Canadian titles worldwide and YouTube Shorts (vertical and short-form videos similar to TikToks or Instagram Reels) act as "lightweight discovery drivers" that nudge viewers toward deeper engagement with related long-form videos (Ogiemwonyi, 2025). Producers and creators frequently re-purpose existing assets on YouTube to lift viewership on other streaming platforms, a tactic consistent with Nielsen findings that 49% of Canadians discover new TV shows via YouTube and 31% subscribe to a streaming service after engaging with content on YouTube (Ogiemwonyi, 2025). While this approach is not a guaranteed pathway – volume and competition are real – YouTube remains a low-barrier gateway to incremental and new audiences.

Additionally, stakeholders across the industry use guerilla marketing, community investments, grassroots strategies, and engagement with social media influencers to promote content and increase discoverability, and to meet audiences where they are. Online and in-person activations are becoming more prominent for promotion – for instance, an activation on a platform like Roblox or an in-person activation at a concert venue. While these tactics can be more effective in that they have the potential to target desired audiences and establish meaningful engagement, they can be costly and are often not possible in modest budgets. New forms of promotion require sustained investment, as well as skills and resources.

Diverse and smaller-budget content should not be excluded from an IP-focused model and from innovative marketing tactics. In today's market, there is an audience for virtually everything as long as content is authentic and resonates. Success is not only about the size of that audience but also about the depth of their engagement and their passion for that topic, genre, or aesthetic. For independent and smaller budget films, one effective avenue is "micro-distribution," a grassroots model of distribution built around

event-based screenings, direct outreach, and slow platform releases (Canada Media Fund, 2025). This approach relies on networking and community-building, engaging directly with groups and organizations, leveraging personal messaging, partnering with independent and art house cinemas, and embracing creativity in promotion.

While distributors may often be reluctant to take on indie films due to perceived low margins and limited financial returns from a traditional theatrical release, micro-distribution provides a viable alternative for films likely to take time to build momentum, or that may resonate primarily with a smaller community or one that may be physically, socially, or culturally isolated. In this model, filmmakers and producers typically retain their theatrical distribution rights. The model is particularly well-suited for documentaries or films tied to social causes, where advocates, non-profits, and community organizations can be integrated into the distribution strategy. Its flexibility allows films to slot openings in independent cinema schedules without being tied to rigid multi-week runs and minimum box office requirements (Welk, 2024). Filmmakers and producers may hire publicists, social media managers, and independent marketers to build visibility. Although revenues are an important motivator, filmmakers and producers pursuing this model are equally driven by impact and community engagement, ensuring their films reach audiences that otherwise might be inaccessible (Welk, 2024). At the same time, these smaller, targeted exhibition approaches can result in expanding networks of viewers over time and geography, and with proof of audience can find continued success on a variety of online platforms.

(Micro) Distributing “Paying for It”

Paying for It (2024) is a Canadian independent feature, adapted from Canada author Chester Brown’s graphic novel, and directed by Sook-Yin Lee. The autobiographical story follows Brown as he begins to frequently see sex workers following a break-up with Lee. As outlined in the CMF article, “Paying for It is rewriting the rules of Canadian film distribution,” the film adopted a unique distribution strategy that may act as a model for independent films.

From the outset, the producers and filmmakers knew that distribution for the film would be a community-based initiative. During post-production, they began strategically planning, allowing enough lead time to define their audience and gather resources. The producers assembled a small team to help with distribution, that included a publicist, booker, social media manager, behind-the-scenes content creator, and merchandise designer. Rather than relying on major chains, the film worked with independent and art house cinemas, festivals, and some smaller-scale local theatre chains. To better connect with the exhibition landscape across the country, they worked directly with the Network of Independent Canadian Exhibitors.

Given their distribution in smaller cinemas and venues, the campaign relied on grassroots tactics, including distributing flyers in shops, engaging with relevant newsletter publishers, community organizations, film clubs, and posting on social media. The filmmaker and producers also utilized their own networks, writing personal emails to help generate word-of-mouth momentum. Brown’s graphic novel was also reissued as a “film-edition” paperback, leveraging cross-media promotion. The strategy explicitly aimed not only at attracting cinephiles and Canadian film lovers, but also average movie-goers who may not otherwise engage in independent Canadian cinema.

The film was rolled out gradually across the country following a slow-release model, often used by US indie features, and it found success in reaching audiences, with many screenings selling out. Several audience members told filmmakers it was the first Canadian film they had seen in years. They also learned that it resonated with immigrants, who saw the film to learn more about Canadian society. In the U.S., the film secured distribution through Film Movement, while Loco Films acquired international sales.

The Paying for It team has also developed a long-tail release strategy that includes physical media, streaming windows, airline deals, and distribution on AVOD and TVOD channels.

The Paying for It distribution model demonstrates how community-forward and independent approaches can resonate with audiences and serve as a viable method for theatrical distribution of Canadian film. Although this model may not be right for every film, it can be useful in a time when community engagement is becoming increasingly important.

Stakeholders noted that awards and nominations are not as important for promotion and discoverability as they once were, as "the best" is subjective and the monoculture is disappearing. However, involvement in awards and award shows is still perceived as good for general promotional value and career development.

Film festivals are enduring tools in promotion and discoverability, as they have effectively become distribution circuits where buyers acquire content. Festivals also act as a "test" to see how audiences react and can reassure funders and financiers of audience interest before wide-scale distribution. However, some producers noted that festivals can be expensive, and content is at risk of "getting lost" among the sea of hundreds of titles.

Funders described festival and press as “earned” visibility that still unlocks licensing and later windows (and should be anticipated in campaign design).

Audio market

In the music industry, live shows remain a powerful tool for promotion and audience development. Consultation participants emphasized that live shows and tours continue to generate revenue and merchandise sales, but they also drive direct, authentic connections between the performer and audiences in different geographic markets, as well as building word-of-mouth buzz and sometimes media attention. Live music and streaming platforms create a virtuous cycle: playing live shows tends to increase streaming volume, and higher streaming numbers lead to stronger ticket sales (Hogue, 2024). Platforms are leaning into this integration, with streaming services increasingly promoting live shows for the artists on their platforms and in some cases adding direct ticket sales to their offerings (Spotify, 2022). Under this umbrella, consultation participants pointed to music festivals as especially crucial to modern discovery; by integrating established artists with emerging artists in one place, festivals are often a place where new talent can build profile, and they represent a forum where new audiences can still reliably be converted into fans.

While singles have been employed for decades in the music industry to promote an album, the streaming era has changed the scale of this effort. In fact, artists and their partners are also increasingly moving away from the traditional album drop and instead employing a waterfall release strategy, releasing many or all of the songs on a forthcoming album as singles over the months prior to the album release (Horus Music, 2024). Following this approach, each new song release not only gets the focused attention to build traction itself and garner playlist placements, but also builds anticipation for the full release and fuels listening of past singles. It has become recommended practice to have a new release on streaming platforms as often as every 4–8 weeks (Lavoie, 2025).

Synchronization is another mechanism by which Canadian artists can reach global audiences through placements in audiovisual content. Music supervisors select and license tracks to accompany visual media, with artists and labels receiving some combination of upfront sync fees and/or ongoing royalties when the content airs or streams. Successful sync placements have become important discoverability opportunities (and revenue sources) for many songwriters and artists, driving increased streaming activity and chart performance (IndieFlow, 2023). While film, television, and advertising continue to anchor the sync landscape, music supervisors now actively seek content for other mediums like social media and video games (O'Donnell, 2025). Better coordination between the audio and audiovisual sectors in Canada could facilitate domestic synchronization and increase cross-promotional benefits.

In sync: Patrick Watson and Alexandra Stréliski

With over 200 career sync placements in film, television, commercials, and video games, Patrick Watson is one of the most prolific Canadian artists in securing sync placements. Winner of the inaugural Impact Award at the 2024 Canadian Sync Awards, Watson's songs have been featured in TV shows like *Grey's Anatomy* and *This Is Us*, and films by prominent Canadian directors such as Denis Villeneuve and the late Jean-Marc Vallée (Burkell, 2024). Watson's single "Je te laisserai des mots" became the first French-language song to surpass one billion streams on Spotify globally after finding prominence as a backing track on TikTok in 2021 and 2022 (Decter, 2024).

Another notable Jean-Marc Vallée collaborator, Alexandra Stréliski, gained prominence through sync placements of songs from her 2010 debut album, *Pianoscope*, in Vallée's *Dallas Buyers Club*, *Demolition*, and *Big Little Lies*, before composing original music for Vallée's HBO's miniseries *Sharp Objects*. Stréliski has gone on to be described by *Billboard* as "one of the foremost new stars in modern classical," garnering over 600 million streams worldwide (Stréliski, 2025). Her subsequent albums *INSCAPE* and *Néo-Romance* garnered multiple Félix Award wins and two long-list nominations for the Polaris Music Prize, with the former winning the 2020 Juno Award for Instrumental Album of the Year (Stréliski, 2025).

These cases demonstrate the relationship between the Canadian audiovisual and audio content in promoting Canadian works. When Canadian music receives placement in prominent film and television productions, it often leads to increased discoverability through streaming platforms and other mediums.

4.3 Social media, influence, and star systems

Social platforms (Snapchat, Instagram, TikTok, X, Reddit, and others) are now indispensable to marketing and promotion. They democratize access by bypassing traditional gatekeepers, enabling creators and partners across the content lifecycle to reach global audiences without established industry pipelines. They also provide real-time consumption data and feedback loops that inform audience development, creative choices, and campaign optimization. Tactics for promoting audio and audiovisual content on social media are highly variable, differing by platform, genre, and demographic, so strategies must be tailored and tested rather than one-size-fits-all.

Online advertising remains a powerful way to target specific segments and capture detailed audience data. Although social and digital buys are more accessible and “democratic” than traditional channels, they still require significant skill, strategy, and investment to be effective. Organic virality and grassroots wins are possible, but unpredictable; results typically come from sustained time, effort, and resources, and more rarely from one-off spikes.

On the theme of influence, the notion of star system also emerged as a key theme in stakeholder engagement. As noted in Section 3.4, Canadian media has historically faced the challenge of “brain drain,” with talent, content creators, and influencers often pursuing careers south of the border. Within the English Canada ecosystem this is especially a challenge as there is a weak star system, ultimately impacting the potential discoverability of content and domestic promotion. By contrast, French Canada (especially Quebec) has a very strong star system of actors, comedians, musicians, directors, and hosts that truly drive audience engagement and can be leveraged for discoverability.

Participants across audio and audiovisual markets (in both official languages) highlighted the strength of Quebec’s star system, noting its deep roots in cultural and linguistic identity and its foundation in decades of structural and cultural policy. While

there are lessons for English Canada, stakeholders stressed that proximity to the world's dominant producer of English-language audiovisual and audio content creates a distinct set of challenges (and opportunities). Quebec players, for their part, can leverage this robust domestic star system, yet many reported that stronger home-market performance does not automatically translate abroad, where they face different barriers to international reach.

Audiovisual market

Despite the challenge of building and maintaining a star system, audiovisual stakeholders have increasingly recognized the value of collaborating with stars, creators, and influencers who bring established online followings and avenues for discoverability. These partnerships, whether through casting creators/influencers as on-screen talent, engaging them as hosts, or enlisting them as promotional partners can expand the reach of Canadian content and leverage the established trust these figures have already cultivated with their communities.

During consultation, one Canadian broadcaster offered a different view. They collaborate with independent creators and influencers not primarily to “borrow” their audiences, but to tap the skills and distinctive points of view those creators bring to audiovisual projects and storytelling. Several stakeholders also noted the difficulty of securing influencer or online media coverage for Canadian content, as engagement economics would tend to favour foreign titles; outlets and creators will prioritize what drives their own audience growth and value.

All stakeholders are also keenly aware of the role of social media in driving up discoverability. Posting clips, highlights, compilations, or behind-the-scenes content online has become standard practice, even if virality is unpredictable. Some broadcasters acknowledged that while these posts may not directly translate to viewership on their platforms, there is still significant value in maintaining social media presence, as it keeps

content as part of wider cultural conversations. This kind of visibility is “immeasurable” but is regarded as a long-term investment in relevancy.

“We are trying to create cultural impact, even if the person who engaged with one of our videos on TikTok isn’t going to watch our show.”

- Broadcaster

Audio market

In the music industry, TikTok and other short-form social media platforms have enabled musical artists to engage with their audience throughout the creation process, using fan feedback as market research while maintaining momentum for their impending releases. As noted in Section 3.3, artists will often deploy pre-release strategies whereby they “tease” new songs in social media content in advance of an album release to see which ones get the most traction on social media, before selecting the highest performing tracks as singles.

Social capital: Tyler Shaw

Canadian singer Tyler Shaw deployed a pre-release TikTok strategy to support promotion of his work in January 2022 after he created a romantic ballad version of GAYLE's hit "abcdefu." Shaw filmed a quick TikTok duet video of himself singing a rewritten portion of the song's chorus, and by the next morning he found it had gone viral – eventually ending up with over 16 million views (Sony Music, 2022).

Capitalizing on the moment of high visibility, Shaw quickly promised his growing audience a full version of the song. In the intervening weeks, as he produced the full song to studio quality, he maintained consistent audience engagement, interacting with fan videos that used his song and bringing viewers into the production process by showing off the work-in-progress in subsequent TikTok videos. He released the full-length version titled "Love You Still (abcdefu Romantic Version)" in February 2022, and the song became a certified hit, garnering nearly 90 million Spotify streams as of September 2025. This approach demonstrates how an artist can convert a viral social media moment into commercial success while using ongoing audience engagement to maintain momentum and prominence with their viewers.

Virality on TikTok and other platforms has become a key indicator of future success; in 2024, 84% of the songs that charted on the Billboard Global 200 had first gone viral on TikTok (TikTok, 2025), demonstrating the platform's role as a pipeline to commercial viability. Consultations revealed that stakeholders across the industry view TikTok as a necessary tool for music discoverability today, drawing some comparisons to MTV's centrality in the 1990s' music industry when music videos were prominent "must-have" assets for any artist with commercial ambitions.

However, recent research indicates that the relationship between social media virality and lasting fan engagement may be more tenuous than many in the industry assume it

to be (Tadesse, 2025). While viral TikTok moments can generate substantial attention on the platform, the follower-to-listener conversion rate is often quite low. Nearly half of consumers who discover music on TikTok do not go on to listen to those songs on streaming platforms, and a majority indicate that they have heard new music elsewhere before they hear it on TikTok. Though TikTok has introduced an “add to music app” feature, the feature has been used by under one third of TikTok users. Amongst discoverability platforms, YouTube leads the way among places that consumers report discovering music (52%) followed by streaming platforms (40%) and TikTok (37%) (Tadesse, 2025).

Seizing the moment, becoming the moment: bbno\$

Vancouver rapper bbno\$ (pronounced “baby no money”) has built a distinctive career on inventive collaborations, an irreverent online persona, and experimentation with release formats. Long before breakout visibility, he and his creative partners treated the internet as a playground, seeding singles across Tinder, Instagram, TikTok, and even Craigslist. The approach carried into later phases: high-concept videos, cross-border features (e.g., Estonia’s Tommy Cash, Vietnam’s Low G and Anh Phan), and Canadian pop-culture tie-ins (e.g., drag queen Jimbo). Tracks like “Edamame” broadened exposure via trailers and soundtracks.

Over 2024–2025, bbno\$ deepened ties with YouTube creators and Twitch streamers, recognizing that creator communities are both distribution channels and co-creative spaces. A cameo by YouTuber-streamer Cr1TiKaL in a 2024 video exemplified a broader tactic.

Micro-campaign anatomy: “1-800” with VTuber Ironmouse

The “1-800” rollout shows bbno\$’s participatory marketing in action. It began with public flirting of intent on X as Ironmouse polled fans about appearing with bbno\$, which he amplified the same day. bbno\$ then set like challenges first for a joint performance in Manila, then for an Ironmouse cosplay, turning fans into active collaborators. The targets were met and bbno\$ posted the cosplay, built short-form content around it, and surprised fans with Ironmouse live-on-screen during his show and the first public reveal of “1-800.” After a quiet hold, the pair revived the bit with playful “let’s make a song” posts. The single dropped the next day (Genius, 2025).

Seizing live streaming moments

In September 2025, bbno\$ executed another spontaneous creative play at Z Event (France's largest Twitch charity marathon). After a day of teases, he joined streamer Antoine Daniel (a connection made only days earlier) online to premiere a new song live, using the reveal itself as a fundraising vehicle. The hype raised \$82,000 in three minutes in front of an online audience of 50,000+, proving that well-timed premieres inside creator events can deliver culture, audience growth, and tangible outcomes simultaneously (Genius, 2025).

4.4 National identity, branding, and campaigns

Throughout consultations, perspectives on the labelling and explicit identification of Canadian content on streaming platforms varied. Some Canadian producers suggested that Canadian content should be clearly identified – for example, through Canadian content carousels/section or with a recognizable symbol, such as a maple leaf. Other producers believed that by explicitly labelling Canadian content it will silo it and create a sense of separation. Instead, they noted that Canadian content should be integrated within the larger pool of global content. Many Canadian-based stakeholders maintained audiences often reject Canadian content and have underlying assumptions that Canadian content is of lower quality compared to US or UK productions. Some also noted that labelling content as Canadian would not likely increase viewership because country of origin is not generally a driver of discoverability or viewership, unless a strong brand has been established (e.g., Japanimation, K-dramas, Nordic noir). Many stated Canadians care more about if the content is good quality or of interest to them than if it is Canadian. At least one streaming service reported that their specific Canadian content carousel/section generally performed poorly.

The Canadian industry has collaborated on national branding efforts to improve the visibility of domestic content. In 2019, the CMF and Telefilm introduced MADE | NOUS, a national initiative that aimed to promote and celebrate Canadian screen-industry

successes and shift perceptions of Canadian content. Since its launch, MADE | NOUS has carried out several campaigns, including the “SEEK MORE” campaign (2021), which encouraged Canadians to engage with content and creators from diverse racial backgrounds and lived experiences, and the “MADE Better” campaign (2023), which highlighted the quality of Canadian content. In 2025, the “MADE Here” campaign spotlighted Canadian’s talent contributions, while the “Stories that MADE Us” campaign sent broadcaster and personality George Stroumboulopoulos and Quebec comedian Rosalia Vaillancourt on cross-country road trips to celebrate the impact of English- and French-language Canadian stories.

While it is difficult to directly measure the success of these campaigns on the discoverability and consumption of Canadian content, campaign evaluations conducted in 2019 and 2021 found that MADE | NOUS had “achieved an overwhelmingly positive sentiment in audience perception of Canadian storytelling, and a favourable opinion of CanCon” (Canada Media Fund, 2023).

Many Canadians across all roles during consultations noted that in light of growing public sentiments to support Canadian industries and products, there may be a renewed interest in Canadian content and perhaps there is an opportunity for amplified national awareness campaigns and initiatives.

Consultations also revealed that, in the music industry, though initiatives like Canadian-only playlists can contribute to a sense of national pride, Canadian artists also often feel as though they are being geofenced to Canadian-only playlists by streaming platforms or only being pushed to Canadian consumers. Artists and industry personnel observe that emerging Canadian artists sometimes require an initial breakthrough in their domestic market before they can access global opportunities. However, these observations should be viewed in the context of a music market that exports more music than all countries other than the US and the UK, which indicates that Canadian music is indeed reaching global audiences.

Hallyu (Korean Wave) and K-content

South Korea has built a coherent national brand by turning early global hits in K-pop and K-drama into a single outward-facing identity: K-Content. The Korea Creative Content Agency (KOCCA) explicitly positions the “K” mark as a unifying symbol for overseas expansion and future growth, reinforcing the brand across creation, distribution, and market development so that core screen sectors and adjacent lifestyle industries move in step.

South Korea became a creative-content powerhouse through a long, coordinated playbook that blended policy, industry-building, and audience-first IP strategy. After the late-1990s crisis, the government treated culture as a strategic export and implemented sustained funding, incentives for production and co-production, export marketing, and support for training, R&D, and SMEs across music, film/TV, games, and webtoons. At the same time, world-class digital infrastructure and early mobile adoption enabled new formats, fast feedback loops, and data-driven promotion.

Creative content companies refined scalable IP (idol systems, K-dramas, game franchises, webtoon-to-screen pipelines), invested in global versioning and partnerships – first across Asia, then in the Western world – and fused online fandom with meticulous release planning and strategic use of social media. The result is an integrated ecosystem (policy, finance, talent development, and platform savviness) that compounds audience demand at home and converts it into repeatable international hits.

KOCCA’s latest overview shows the content industry reaching an estimated US \$115 billion in revenue and US \$14.35 billion in exports in 2023, with employment around 650,000 jobs – evidence that K-Content has matured into a heavyweight pillar of the economy (KOCCA, 2023).

Crucially, the “K” brand travels beyond media into everyday consumption and place-making. Academic and policy analysis of the Hallyu wave documents significant spillovers: as global audiences discover K-pop and K-drama, demand rises for tourism, cosmetics, food, fashion, and electronics, tightening the loop between screen visibility and real-world economic outcomes. In short, what began as cultural export has become a diversified growth engine under one cohesive banner (Santos & Marques, 2022).

The South Korean model is further explored in Section 6.1 – International Perspectives.

5. TECHNOLOGY, DATA, AND PLATFORM DYNAMICS

Technology now underpins discoverability because data is the operating language of how works are indexed, ranked, and recommended. While reverse-engineering opaque algorithms is a losing game, a set of practical tactics and standards, from metadata hygiene and strategic packaging for recommenders to iterative testing, has emerged to improve the odds that Canadian works are surfaced. The ubiquity of algorithmic decision-making also recasts the role of human curation: services and industry stakeholders are increasingly seeking a productive balance between hyper-personalization (driven by data) and creative editorial judgment (driven by cultural expertise, context, and intent). This section outlines how platforms operate at that intersection, and what data and practices matter most in the advent of an AI world.

5.1 Devices, UI, and platform discoverability

Discoverability of content is not only shaped by word-of-mouth or platform prominence, but also by the devices that audiences and listeners use to access content. The way applications are integrated into devices (TVs, smartphones, etc.) has a significant impact on how content is discovered. Many connected TVs (e.g., smart TVs, game consoles) and devices (e.g., vocal assistant, smartphones, cars) come with foreign-owned streaming services pre-installed, inherently elevating the content on those services to Canadians. Some remote controls feature dedicated buttons with streaming service logo, giving users one-click access to those apps and services. These placements are negotiated directly between device manufacturers and major global streaming service or as part of a holistic strategy (e.g., YouTube on Android operating systems, both owned by Google/Alphabet). Although they are costly partnerships for streaming services, they are highly strategic because they position their services conveniently and prominently to users.

Although some Canadian streaming platforms may appear on some devices, they are not as ubiquitous as foreign-owned services and as a result users may have to download them manually, creating an additional barrier to discoverability. This barrier is a major concern for Canadian broadcasters and rights-holders as connected TV accounts for a significant portion of audiovisual content consumption. Some Canadian broadcasters noted that they have little leverage when negotiating with device manufacturers, and placement opportunities are expensive and generally lack transparency. A lack of Canadian options on connected TV devices is alarming to some stakeholders because the use of connected TVs among Canadians is increasing, with roughly 79% of Canadians living in homes with a smart TV (ThinkTV, 2024).

5.2 Recommendation engines and editorial

Most streaming services use a combination of curated recommendations designed by humans and viewer-activity driven algorithms. These interventions are often described as the “secret sauce” within each streaming services’ business models, although stakeholders noted that not all streaming recommendation engines are created equal. Each system varies widely, and some are more sophisticated than others, but all are important in driving discoverability.

Recommendation engines ingest thousands of signals (e.g., user behaviour, session context, device, and rich-content metadata) to predict what each person is most likely to watch or listen to in a sea of options. Multiple, continuously evolving models (including AI/machine learning) drive these systems, producing a high degree of personalization. Home screens, rows, categories, even thumbnails can differ from user to user based on learned preferences.

Streaming services also mine behavioural data such as skips, binges, rewinds, and abandon points to refine recommendations and to inform creative and packaging decisions aimed at retention (i.e., providing more of what the user base seems to enjoy). One streamer noted that, for TV shows, something as simple as opening with title credits

can shed a measurable share of viewers within the first minutes. In practice, algorithmic insight now shapes both what is surfaced and how content is presented, with the objective of maximizing engagement across the catalogue.

“We lean on personalization, curation, and carousels – including Canadian and Indigenous shelves – but it’s a blend of editorial and metadata.”

- Streaming service

In terms of editorializing and curation on streaming services, some foreign streaming services with Canadian operations reported having local Canadian staff for human-informed tailoring. To maximize engagement or discoverability, these Canadian operation teams may strategically highlight new or less globally recognizable Canadian content in relation to an established piece of content or IP. For example, recommendations for a new Canadian police procedural may be recommended to viewers of long-standing American police procedural to build on an already established audience base.

However, not all services have significant in-Canada “on the ground” presences, which creates knowledge gaps, especially for regional, Indigenous, or Francophone content. Some services have emerged to address this gap, especially in the audio sector. For instance, the French platform Groover allows artists to submit targeted demos to registered curators, labels, and music media, facilitating access to key decision-makers.

A gateway to Francophone music: MUSIQC

MUSIQC is a free, editorially curated listening space dedicated to showcasing Francophone music launched by SPACQ-AE in February 2025 and supported by CALQ, SOCAN, and Musicaction. Rather than competing with major streaming platforms, it leverages users' existing subscriptions and catalogue access. Listeners browse MUSIQC's human-programmed playlists (professional programmers or guest public figures) and are deep-linked to the tracks on their preferred services. No new account, no extra fees, just an intuitive front door to Francophone music.

In a market dominated by international Anglophone and multilingual content where only ~5% of online listens in Quebec are for local music, MUSIQC tackles a classic discoverability gap: connecting audiences with culturally relevant content while respecting current listening habits. It converts "discovery intent" into actual plays on the platforms people already use, boosting visibility, access, and appreciation for Francophone works among Francophones and Francophiles.

While it may be too soon to fully grasp the impact of this initiative, SPACQ-AE shared a few insights on the success of this portal. Two months after its launch, MUSIQC had recorded more than 213,000 unique visitors for an average of 106,000 monthly visits across 90 countries. These visits had converted into 130,000 plays of YouTube Music playlists and 91,000 clicks on the "listen" button on MUSIQC. (SPACQ-AE, 2025). The initiative has gained some interest in France and across francophone Africa, with the potential development of local portals.

Advances in AI are expected to impact recommendation engines and search functions on platforms. For example, AI-enabled search may allow users to engage in more conversational queries, asking for content based on certain themes, plot lines, or their mood, rather than searching only by title. Biases within AI systems or within specific recommendation engines may show results that favour some content over others,

creating additional barriers to discoverability. Conversely, AI queries may surface works that were previously hard to find and may aid in having audiences discover more of a variety of content.

While streaming services provide some analytics on audience, Canadian creators mentioned that they share limited insight into how discovery via recommendation engines and editorial happens. Conversely, consulted streamers noted that proprietary recommendation engines and data are key to business models and survival in a highly competitive market. Although there is an understanding that these systems are driven by behaviours and data, ultimately there are many factors that are publicly unknown and strategically left opaque. Therefore, it is difficult to know why certain content is promoted over others, and how Canadian content is weighted or prioritized among vast libraries of global content. As a result of this ambiguity, algorithms are not something that can be regulated or directly harnessed to uplift the discoverability of Canadian content.

“Streaming services do not share viewing data; even where we do get some, there’s no common definition of a ‘view.’ Broadcasters remain our best partners for transparent audience data.”

- Funding body

5.3 Metadata, search engine optimization, and AI

Metadata is structured information that describes a piece of content so people and systems can find it, understand it, use it, and pay for it. In the broadcasting sector, three broad types can be identified:

- 1- **Descriptive metadata:** objective tags (such as title, creator/artist, release date, genre, language, synopsis and credits) used to organize, search, and present content

- 2- **Ownership/rights metadata:** the less visible “chain of title” and rights-holder information that enables licensing and ensures royalties flow correct. Hundreds of millions of dollars are estimated to be lost every year because of inconsistent and bad data in music streaming (Ivors Academy, 2021)
- 3- **Recommendation metadata:** more subjective tags (e.g., mood, micro-genre, context of use) often developed or refined by online services to feed their own recommendation engines and improve personalization

Metadata is seen as fundamental to improving the discoverability of Canadian audiovisual and audio content. Throughout consultations, participants consistently emphasized the connection between discoverability and structured, enriched metadata. Industry stakeholders (from industry associations to broadcasters) and thought-leaders stressed that without a coherent and shared metadata layer (including open data, authoritative identifiers, and knowledge graphs), Canadian works are less legible in search, recommendation, and AI-driven environments. This observation seems to be especially true for music where data points like “country-of-origin” flags are inconsistent and music metadata does not include the nationality of the composer or songwriter, creating a major gap for Canadian music discovery.

“We lack a common data vocabulary across Canadian broadcasters – an industrial error we are trying to correct.”

- Broadcaster

Although the importance of metadata was stressed, both the audio and audiovisual sectors lack the knowledge and the resources to work effectively with metadata systems and to address key challenges. Metadata specialists highlighted recurring pain points: duplication, error-prone metadata across the chain, and “orphaned” rights once licences lapse.

Industry associations and thought leaders noted that Wikis or reference websites like IMDb/TMDB are not properly leveraged. Proper use of these platforms can significantly help with discoverability, because search engines like Google weigh them heavily. However, to leverage these websites, significant resources and time is required and often cannot be prioritized by independent rights-holders or creators. Funding bodies and industry associations have begun to address these challenges by educating rights-holders on this issue and providing them with some funding to facilitate data gathering and transferring.

Another challenge is that metadata standardization must be coordinated internationally because of the global nature of content distribution and consumption. Some pointed to the UK initiatives for metadata standardization as potential models, but even emerging standards (such as DDEX in the audio sector) and open-source databases (e.g., ISRC code catalogue) are far from complete or widely adopted.

Equity considerations arise in relation to Indigenous data and minority languages. Participants highlighted the importance of aligning with First Nations' ownership, control, access, and possession (OCAP) principles and ensuring Indigenous languages are properly coded in metadata, so they are recognized by machines and recommendation systems.

Similarly, language minority communities are challenged in building comprehensive Wikis because these websites often require multiple sources for validation. Associations operating in the French-language OLMCs pay particular attention to the impact of technology and metadata best practices in order to safeguard discoverability of French-language content. APFC has piloted best practices with six independent production companies based in OLMCs, applying a discoverability strategy to an ongoing production over three years, and highlighting the need for comprehensive metadata plans (rich websites, Wiki Universe, IMDb page, SCHEMA data), among other key actions to develop and engage audiences (APFC, 2022). Other organizations, such as the Fédération Culturelle canadienne-française (FCCF), participate and develop various initiatives related

to the discoverability of French-language content across Canada. The FCCF is currently developing a new digital strategy to address emerging pressures related to AI, scheduled for release in the fall of 2025.

This issue surrounding metadata uncovers a governance gap and signals that Canada should consider treating cultural metadata as a commons. Some stakeholders pointed to the book sector’s infrastructure as an inspiring model and proposed a neutral governance layer to steward shared metadata/rights over decades. Prioritizing metadata for cultural content is a matter of sovereignty, continuity, and bargaining power for Canadian rights-holders. Search engines are often the first point of entry for audiences seeking content and prioritize information that is properly indexed with robust metadata. Therefore, structured and consistent metadata is crucial to how content is discovered. If Canadian-content metadata is inconsistent, it will lose the ability to ensure that Canadian output is ranked highly in search results and lose the ability to be discoverable in Canada and globally. Unlike streaming recommendation engines, Canadian rights-holders, and the wider cultural and creative community, can attempt to control how Canadian works are described and tracked, rather than deferring to external or foreign bodies.

“Discoverability is a shared responsibility – create once, enrich across partners, govern it as a commons – so Canadian works are legible and surfaceable everywhere.”

- Thought leader

As Canadians think about harnessing metadata, it is also important to consider how AI will radically change how metadata is structured and potentially search beyond metadata to learn directly from the content itself (e.g., scripts, locations, voices, sounds).

Stronger public investment in metadata infrastructure is ultimately about Canadian data sovereignty. Canada needs independent registries so that accuracy, provenance, and

cultural context remain under domestic stewardship. As online information increasingly flows through foreign AI systems trained on vast, often unverified, web data, publicly governed metadata becomes the anchor that preserves trust, ensures correctness, and protects Canadian perspectives in an AI-centred ecosystem.

6. REGULATORY LEVERS

6.1 International perspectives

Countries around the world are grappling with the challenges and opportunities brought about by the rise of foreign online streaming services and, in particular, the impact of these services operating within what was once a regulated closed-system, country-by-country broadcast environment. As Canada develops regulations stemming from the *Online Streaming Act*, it is useful to consider approaches in other countries and regions.

The European Union was amongst the first international jurisdictions to introduce policies related to online streaming services through the Audiovisual Media Services Directive (AVMSD), first adopted in 2010 and then revised in 2018. The AVMSD provides member states with some obligations and some optional directions to regulate online media services. The adaptation of these obligations and directions provides opportunity for reflection and observation as Canada contemplates similar action. Australia is in the early stages of legislation and regulation, while the UK has chosen to retain aspects of the AVMSD since leaving the EU. Finally, Korea, with its significant global impact in music, audiovisual, and popular culture has evolved in an unregulated environment, providing yet another perspective on discoverability.

European Union: interventionist regulatory framework allowing significant optionality

The primary instrument of audiovisual broadcasting regulation in the EU is the AVMSD, which also brought Video-Sharing Platforms (VSPs) within its scope. The AVMSD provides for EU-wide coordination of national legislation on all audiovisual media including traditional TV broadcasts and on-demand services. It does not cover audio services such as radio or podcasts, though the European Parliament did stress that member states are free to include other types of media, such as radio, online audio, or the press, when transposing the AVMSD into national law.

The AVMSD does not specifically address discoverability; rather it focuses on presence and prominence through Articles 13 and 7a, as well as the creation of a biennial reporting regime to monitor implementation of Article 13. Articles 13(1) and 13(4) are required of all signatories, whereas Articles 13(2) and Article 7a are optional. Under Article 13(1), signatories must “secure at least a 30% share of European works in their catalogues and ensure prominence of those works.” Article 13(2) provides for financial contributions to European works to be applied but is optional (if taken up, Article 13(3) provides direction on the calculation of the share of European works). Under Article 7a, signatories “may take measures to ensure the appropriate prominence of audiovisual media services of general interest,” providing for the possibility without obligation. The article applies to audiovisual services in general, not just on-demand audiovisual media services (i.e., television services, catch-up services, and video on-demand services). The AVMSD does not define what constitutes “general interest” and so it is left to the member state to establish that definition. In doing so, member states must ensure that general interest regulation is proportionate and coherent, and in particular may not discriminate directly or indirectly between content produced in the member state itself and content produced in other EU or European Economic Area (EEA) member states.

Taking a step back, presence is, of course, a first requirement of discoverability (without presence the content cannot be found). Prominence is often understood to be the next order of business – once the content is present, it must be prominent to be found. This understanding of discoverability does not fully consider the role of audience in driving prominence through its engagement with specific content (which in turn informs the platform algorithm). Nonetheless, the AVMSD requirement of at minimum 30% European content within a media service catalogue may indirectly influence the demand for European content by ensuring a specific level of supply. Arguably, a higher percentage of a certain type of content could improve the likelihood that content has prominence.

Two additional key pieces of regulation in the EU’s digital regulatory landscape relevant to the question of discoverability are the *Digital Services Act (DSA)* and the *European Media Freedom Act (EMFA)*.

The DSA was issued in October 2022 and aims to create a safer digital space for users and to establish a level playing field for businesses, explicitly bringing social networks and content-sharing platforms within its scope. As part of the Act, online platforms are obliged to guarantee greater transparency and control of what is seen in user feeds, and specific rules are applied to very large online platforms (VLOPs) or very large online search engines (VLOSEs) – both defined as having more than 45 million users per month. Both audio and audiovisual content would fall within scope. The intention is to allow users to discover how online platforms rank content in users' feeds and to provide the option to opt out of personalized recommendations (i.e., turn off personalised content). It should be noted that since February 2023, the EU has required online platforms and search engines, irrespective of the size of their user base, to publish user numbers.

The EMFA entered into force in May 2024, and the new rules became fully applicable in August 2025. Its focus is the protection of media pluralism and independence in the EU. The intention is to allow both public and private media to operate across the EU internal market without undue pressure in the current period of digital transformation. Of relevance to Canada is how the EMFA has introduced a right of customization. Customization in this case enables the user to change the default settings on their devices and interfaces (for example on connected TVs) to reflect their own preferences. Article 19 states, "When placing the devices and user interfaces referred to in paragraph 1 on the market, manufacturers and developers shall ensure that they include a functionality enabling users to freely and easily change the default settings controlling or managing access to and use of the audiovisual media services offered."

Under the aegis of the AVMSD, the European Regulators Group for Audiovisual Media Services (ERGA) was set up in 2014 to advise the European Commission, bringing together high-level representatives of national independent regulatory bodies in the field of audiovisual services. As a result of the EMFA, ERGA has been replaced by the European Board for Media Services, as the independent advisory body to the Commission. For Canada, learnings from this structure may be less about harmonization of regulation within a single framework and more about a coordinated effort across industry

stakeholders – both within the broadcasting system and across the broader ecosystem of the content lifecycle. And, in addition, there may be learnings about the convening of efforts in different jurisdictions to address discoverability across all roles to facilitate learning.

In January 2024, the European Commission produced a working paper on the application of the 2018 revision to the AVMSD, which confirmed the importance of the Directive as an essential instrument to govern the coordination of national legislation for all audiovisual media and, in particular, online media services. In November 2024, the Commission indicated its intention to review the AVMSD in 2026. In May 2025, the European Council¹ responded, providing their priorities for the audiovisual media sector, which included provisions governing video-sharing platforms, such as YouTube and Tiktok, and a need to include audiovisual media content produced by influencers or professional content creators. The review has been put out to tender and includes as part of its objectives a review of Article 13, which addresses the presence and prominence of European works.

The introduction of two new acts, and the forthcoming review of the AVMSD in 2026, all in quick succession since the 2018 amendment of the AVMSD, point not only to the need for regulation, but also for the need for a nimble, and at times iterative, response to a rapidly evolving environment. It is likely, given the ongoing rapid evolution of the broadcasting system, that continued monitoring to measure the impact of interventions and to facilitate adjustments will be required in the future as technology continues to evolve.

The AVMSD allows for a great deal of latitude in how it is implemented and so a deeper consideration of specific jurisdictions provides additional perspectives to online audiovisual regulation, as well as online audio. In this report, France, Germany, and Ireland are included, as well as the UK, which, while still a member state of the EU,

¹ The members of the European Council are the heads of state or government of the 27 EU member states, the European Council President, and the President of the European Commission.

implemented the AVMSD and the 2018 revision. Since the UK's exit from the EU, it now formally operates under the European Convention on Transfrontier Television (ECTT) framework, which includes 20 EU member states.

France: regulation as the core pillar

France's transposition of the AVMSD leverages ambitious catalogue (i.e., presence) and prominence obligations with contribution requirements that apply to both domestic and foreign services operating in France. For instance, for on-demand services, France requires that, at any moment, at least 60% of works in catalogues be European, with a minimum 40% of works in original French language (European Audiovisual Observatory, 2024).

When it comes to prominence, linear broadcasters must reserve a majority of transmission time for European works, set nationally at 60% overall and 40% for French works, with higher thresholds for the public broadcaster. Prominence is also addressed for on-demand services. These services must give European, and specifically French, content visible placement via dedicated homepage sections, editorial carousels, recommendation tools, search functions, and promotional campaigns. The French regulator Arcom implements and oversees this regime through a 2021 decree and individual agreements with services. The decree empowers Arcom to detail these measures in the agreements, translating the directive's prominence requirement into concrete user interface (UI) and marketing expectations (European Audiovisual Observatory, 2024).

France has also transposed the financing measures outlined by the European AVMSD. On-demand services, including foreign platforms, must devote a share of their French turnover to the production of European works and French-language content. The obligation ranges by service type but falls broadly in the 15–25% band and is channelled across cinematographic and audiovisual categories with a significant portion reserved for independent production (European Audiovisual Observatory, 2024). Trade and industry

reports suggest that, for major global streamers, the effective level has been set around 20–25% of French revenues. Parallel rules apply to linear broadcasters with differentiated rates. Public reports indicate that these measures have generated substantial investment commitments since 2021.

Overall, France goes beyond the AVMSD minimum of 30% by imposing a 60% European catalogue share and layering specific prominence techniques and sizeable financial contributions. In combination with majority transmission-time quotas for linear services, the French model secures both the presence of European/French content, their visibility within services, and a continuing flow of investment into European and French-language production.

However, it is important to note that the AVMSD and its French transposition do not apply to audio-only services. Rather than setting catalogue quotas or prominence rules on music services, France has introduced another mechanism: since 2024 France levies a 1.2% music streaming tax on the French revenues of music streaming services (Légifrance, 2023). Proceeds fund the Centre national de la musique (CNM) to bolster the domestic music ecosystem, including initiatives around diversity, promotion, and market development. The CNM also tracks diversity on streaming and other media via recurring reports, creating a national evidence base on exposure and consumption patterns that can inform policy and platform practices (CNM, 2024). Meanwhile, radio remains governed by statutory French-language song quotas (typically 40% on private radio, with specific conditions for new talent).

Ireland: caution at the heart of audiovisual regulation evolution

In many ways, Ireland faces some of the same audiovisual sector challenges as Canada. It has two official languages (Irish and English) and borders a much larger media market, the UK, with which it shares a common language, English. In fact, the UK's leading terrestrial broadcasters have prominent positions on Ireland's BDU equivalents: Sky DTH satellite, Virgin Medi cable tv, and Eircom IPTV. Ireland's audiovisual policies consider

protection of its indigenous language (Irish), not unlike Canada's approach through the *Official Languages Act* and the *Broadcasting Act*.

With respect to discoverability, like its fellow member countries in the EU, Ireland's broadcasting regulatory framework follows the AVMSD with the prominence articles transcribed into Ireland's national legislation; however, Coimisiún na Meán, Ireland's media-sector regulator has not yet introduced nor enforced any specific regulations. In anticipation of any regulation that could come out of the transcribed AVMSD (and potentially a new AVMSD in 2026 with a wider scope), the Media Regulation Bill was introduced in July 2025. If passed, it would designate Coimisiún na Meán as the body responsible for overseeing the development of a media ownership database and engaging with industry to promote transparency around audience measurement systems. The Bill envisions the registration of VOD platforms such as Apple TV and Google; however, a key aspect of the registry is that it will only include platforms that are based in Ireland. Apple and Google have their European headquarters in Ireland while others such as Netflix, Disney, and Amazon will not have to register in Ireland as they are based in other EU countries and simply transmit into Ireland.

In the radio market – much like linear audiovisual broadcasters RTÉ, Virgin, and TG4 are strictly regulated by their licence commitments – radio broadcasters on AM and FM bands in Ireland are governed by strict licence requirements. The provision of digital audio broadcasting (DAB) is quite low in Ireland compared to other European countries and the UK. Regulation of audio platforms in Ireland is much more in the form of carrots than sticks, with a process for complaints, which the regulator investigates. That is the extent of the regulatory framework governing the audio market in Ireland.

When it comes to promoting prominence of content or other policy objectives relative to Ireland's indigenous communities and/or languages, the Coimisiún na Meán leans on public media service providers, RTÉ and TG4, and the commercial broadcaster Virgin Media TV (which currently holds a contract for the transmission of a national free-to-air television service). Those contracts and licences all have prescriptive content objectives

including obligations in relation to cultural, news, and current affairs programming. In contrast, Ireland's approach to other types of audiovisual platforms – and specifically online platforms – follows an overriding principle of “flexibility.” The codes of conduct and rules introduced by the Coimisiún na Meán under these powers are also meant to be quite flexible. Ireland and the Coimisiún na Meán prefer to use this principles-based approach with regards to prominence online rather than a prescriptive regime.

If there is one lesson that can be drawn from Ireland's experience, it is that any regulation around discoverability, or even prominence, requires the regulator to manage the expectations of all stakeholders. In Ireland and elsewhere, regulators are tasked with conveying their country's cultural and social objectives as expressed through audiovisual policy to foreign-owned platforms. At the same time, regulators must recognize that the business objectives of the online platforms may not align with those policy objectives. Within that context, it is likely that some sort of regulatory framework will be required to ensure that domestic audiences can readily access domestic content. Throughout, it is important that regulators do not lose sight of the fact that discoverability of content is complex, and the sort of prescriptive regulation that has worked within conventional time-limited audiovisual platforms and one-to-the-many broadcasting systems requires adaptation to today's on-demand, anytime system.

Germany²: “public value” framework

As with other EU member states, Germany complies with the AVMSD. Interestingly, it is one of very few countries within the EU that has chosen to implement Article 7a. Germany has 14 state media authorities that work together under an umbrella brand die medienanstalten and are subject to the German Interstate Media Treaty. The operation of Article 7a in Germany is qualified by Section 84 of Germany's Interstate Media Treaty, which provides for rules on the discoverability of both TV and audio broadcast and of on-

² In regard to Germany, CRTC identified the Media Authority of North Rhine-Westphalia as a peer regulator in Germany to be consulted.

demand services on user interfaces of media platforms. The objective of Section 84 is to ensure media pluralism as a critical component of a functioning democracy. Services with a “particularly significant contribution to the diversity of opinion and content” must be “easy to find” on user interfaces (Sec. 84 (3), (4) MStV).

Introduced in 2022, the provision includes conferring a special status, translated as “public value,” on content from public service broadcasters (RD, ZDF, Deutschland radio) and content that makes a significant contribution to the diversity of opinion from commercial providers. The definition and determination of “public value” falls to state or regional media authorities to define according to the following criteria set out in the Treaty:

- The amount of time spent reporting on political and historical events, and on regional and local information;
- The ratio between in-house productions and program content produced by third parties
- Quotas of accessible content, European productions or content for young audiences
- The ratio between trained employees (in the creation of the program) and those being trained

Media services conferred the “public value” status are made “easy to find” through a list published by state media authorities. The status is time-limited, and media services conferred the status must reapply at each tender along with new applicants. Section 84 of the German Interstate Media Treaty is intended to both support user access to multiple media services and to incentivize investments in the production of “public value” content. Under this provision, German media services with a “public value” status are published through user interfaces including electronic program guides and software front-ends running on smart TVs and connected accessories, such as TV sticks or set-top boxes.

In consultations with audio and audiovisual industry stakeholders in Canada, the vital importance of media pluralism to ensure audiences have access to a range of news sources and other content was regularly raised. The approach taken in Germany provides an example of how to approach prominence from the perspective of ease of access on both physical and virtual user interfaces.

Australia: a new regime with lessons to teach

Under the auspices of the 1992 *Broadcasting Services Act (BSA)*, the Australian Communication and Media Authority (ACMA) regulates audio and audiovisual broadcast but not online services.³ ACMA has been advocating for a mandate extension to include the regulation of online audio and audiovisual services; however, currently, only Parliament, by statute, or Government, through secondary legislation, can directly regulate online services. In 2024, Australia advanced on the question of discoverability of media services, introducing laws to establish a TV prominence framework, which will take effect in 2026. The ACMA is responsible for overseeing the TV prominence framework, which is intended to assist audiences to more easily locate and access Australian free-to-air broadcast television services and BVOD apps on smart TVs and other similar streaming devices. There is currently no such framework for radio services.

The initial consultation in 2022 on online regulation included a broader exploration of discoverability but the Government chose to focus on the introduction of a prominence framework to the *Broadcasting Services Act 1992 (BSA)*. The legislation places a “MUST CARRY” obligation (rather than a “MUST OFFER” obligation). This means that if a broadcaster adapts its BVOD app to be placed on a regulated television device, it must be

³ There is one exception: an anti-siphoning scheme, which prevents media content services - including subscription television broadcasters and streaming services - from acquiring a right to televise or otherwise provide coverage of an event on the anti-siphoning list unless a free-to-air broadcaster has a right to televise the event on a broadcasting service.

The anti-siphoning list is a legislative instrument made under the BSA that allows the Minister for Communications to designate events that should be televised free to the general public. They tend to be sporting events and can apply to streamers.

carried on the device; however, the broadcaster has no obligation to offer its app on a regulated television device.

Regulated TV devices manufactured after January 10, 2026, must include the five BVOD apps considered “regulated television services” as well as “free-to-air” (linear) broadcast TV icons (where the device is capable of receiving terrestrial broadcast TV). In both cases the icons must be immediately visible without the user taking any action and provide equal prominence with other apps displayed on the devices including foreign online services such as Netflix. However, the regulation does not preclude the broadcasters from paying for greater prominence. The regulation is detailed and prescriptive in relation to the size, shape, location, and immediate access to the icon (Australian Ministry for Communications). How this prominence framework beds down and makes it easier for Australians to access free-to-air broadcasting content will be statutorily reviewed in 2028.

The BSA sets quotas (over a calendar year) for Australian programming on any commercial TV broadcaster of at least 55% between 6 a.m. and midnight on their primary television services, and at least 1,460 hours of Australian programs between 6 a.m. and midnight on their non-primary television services. The BSA also establishes the New Eligible Drama Expenditure (NEDE) scheme, which requires subscription television broadcasting licensees and channel providers of drama channels to invest at least 10% of their total program expenditure, relevant to their drama channels, in new Australian drama.

Building on this requirement for new drama but widening to all first-release Australian programming, the ACMA’s Broadcasting Services (Australian Content and Children’s Television) Standards 2020, operates a points-based assessment of commercial free-to-air television broadcasting services, which requires the service to score a minimum of 250 points of first-release commercial free-to-air television broadcasting services. The key objective of the Standards is to support continued access to television programs produced under Australian creative control that develop and reflect a sense of Australian

identity, character, and cultural diversity. The national broadcasters ABC and SBS do not formally have quotas, but their public responsibilities ensure Australian content prominence.

Other recent regulatory activity includes the current Code Review for Radio. A co-design process has been implemented, where Commercial Radio and Audio (Australia's industry body for commercial radio broadcasters) will develop a code of practice, to which the ACMA will respond. Radio prominence on smart speakers and the inclusion of car radio devices have been part of this review with an announcement regarding the Code anticipated by the end of 2025.

The other area of potential intervention is the long-standing discussion on SVODs. For almost four years, there has been a publicly stated commitment for SVODs to meet a minimum investment in Australian content, which was re-affirmed following the 2024 general election. As of November 2025, the Australian government introduced the Revive Bill in parliament, which includes provisions that will require SVODs to spend 10% of their expenditure or 7.5% of local revenues (whichever is higher) on local originals. These provisions are intended to increase investment in local drama, documentary, children's, arts, or educational programming. No timetable is indicated but it is aimed at streamers with more than one million subscribers in the market, and so will most likely affect Netflix, Disney+, Paramount+, Amazon Prime Video, and Stan – the last of these is Australian-owned. Currently, all five voluntarily report their expenditure on Australian programming to ACMA, though the Government has committed to making this reporting a statutory requirement, which will afford ACMA greater scrutiny.

For Canada, the Australian experience informs the need for flexibility and long-term planning. Regarding regulation that a manufacturer will need to conform to, it needs to be done via an instrument that the regulator can readily amend. The lack of flexibility in the Ministerial regulations laid down in Australia have caused problems. Therefore, any regulatory instrument needs to be amendable in response to a circumstance legislators and/or regulators did not anticipate during consultation or drafting of that regulation.

The time scale involved when introducing new regulations on manufacturers needs to be cognizant of the development cycles for new product coming to the market: manufacturers will need time to re-design products and to then produce new products.

As part of further learning, in Australia, the obligations fall on the manufacturer of a TV device, whereas in the UK it falls on the operating system. ACMA has noted that this difference in onus is beneficial, as compliance is actually governed by the operating system. Consequently, manufacturers only have limited influence over the operating system providers and are dependent upon operating system providers choosing to engage with them.

United Kingdom: a market-led prominence regime

Ofcom is the independent regulator and competition authority for the UK communications industries. It works with the Department for Science, Innovation, and Technology, and regulates the TV and radio sectors, fixed line telecommunications, mobiles, and postal services as well as the airwaves over which wireless devices operate. When it comes to the issue of discoverability in the UK's audiovisual market, Ofcom takes a relatively "hands off," market-driven approach with regulation limited to oversight of domestic (and European) content prominence. The focus is to ensure British households have access to the public service broadcasters: BBC, ITV, Channel 4, and Channel 5. However, as noted above, following withdrawal from the EU, the UK retained in law the AVDSM Article 13 requirements of 30% European content share of on-demand program service offerings along with the prominence of such content.

In regard to linear broadcasting, electronic program guides (EPGs) are subject to the 2024 Media Act, with regulation to ensure that the UK's public service broadcasters have prominent positions in EPGs (i.e., a low EPG number near the top). There is no comparable prominence regulation for online offerings. As a result, bargaining power determines prominence in the connected TV space for all broadcasters, including public service broadcasters. This market-driven situation for connected TVs and the online

audiovisual space is set to change, however, before the end of 2025, when Ofcom plans to publish a code of practice. Among other things, this code of practice will set out recommendations to ensure the UK's public service broadcasters have prominence on connected TV and online platforms.

Whatever form the regulation in the online connected platform space takes, it will be important to monitor prominence. In the linear broadcasting space, monitoring has been relatively straightforward because there has been transparency and ample data sharing, between public broadcasting services and the multichannel platforms. In the online and connected space, however, Ofcom has noted that data sharing between the public broadcasting services and the platforms is not standardized. With that in mind, Ofcom continues to explore how prominence can be measured and linked to audience engagement and viewing data with metrics are still under development.

Ofcom's upcoming guidance will also address data sharing between connected TVs, online platforms, and content providers. Any agreements for data sharing will have to be aligned with the UK's Media Act. That being said, one of the key policy principles within the UK's Media Act is to ensure prominence without stifling platform innovation. This principle will be the key criteria through which prominence, practices, codes of conduct, and even regulations themselves will be scrutinized before introduction into the UK market. Ofcom has also recognized that algorithms are important in the discoverability of content and is seeking to develop guidelines and regulations that are technology-neutral, to reduce the need for constant reforms to keep up with the rapidly changing technologies characterizing the global audiovisual programming distribution sector.

The UK's audio market is subject to even less regulation and oversight than the audiovisual market, when it comes to prominence. Where the audiovisual market is subject to a certain degree of prominence regulation, particularly in broadcasting, there is no comparable regulation for the UK's audio market. In fact, in the audio market, UK regulation is focused on "availability" of services rather than the prominence of any services.

The UK's 2024 Media Act introduced the first obligations in regard to availability of online radio services. Part 6 of the Media Act aims to secure radio service availability through designated platforms including voice-assisted platforms such as Alexa and Google Assistant. The legislation requires that these platforms make listed radio services available when requested, deliver streams without ads or interruptions, route streams according to broadcaster preferences (for example, via propriety apps) and not charge for the provision of the availability of this curation service. Ofcom maintains a list of eligible radio services. To be on this list, the radio service must obtain a broadcast licence from Ofcom. Licence conditions require eligible radio services must provide identical over-the-air and online streams.

While the legislation makes provision for availability of licensed radio services it says nothing about prominence. Prominence in this market segment is driven by market forces to a large extent. The degree to which, for example, an aggregating platform such as Alexa will promote a radio player website or will promote a radio service is subject to negotiation between that service and the platform. So, whether it is a home page placement or ranking on the platform, it all comes down to negotiating the position of the radio service and the platform.

Considering both the audiovisual and audio market regulations in the UK, it is useful to highlight how it contrasts with those in Canada in several respects. The UK's regulation of prominent positioning for its public services broadcasters on television EPGs is relatively narrow compared to Canada's media regulation, which seeks to use a wider range of supply-side regulatory tools to ensure that Canadians have access to a wide range of Canadian and Indigenous programming in both official languages and that reflects the demographic diversity of the residents of Canada. This is a much more complex policy objective than ensuring carriage of four broadcasters, which, for decades, were able to build up domestic audiences because they were protected from direct contemporaneous competition from foreign programming services.

South Korea: promotion and excellence driving export

South Korea's approach to discoverability blends targeted broadcast regulation with a broad, non-regulatory stack focused on promotion, market development, skills, infrastructure, financing, and copyright rules enforcement. The Ministry of Culture, Sports, and Tourism (MCST) directs policy for the content industries across the lifecycle while the Korea Creative Content Agency (KOCCA) executes through programs, facilities, and global market initiatives. Together, these institutions organize an effort in which light regulatory obligations shape linear broadcasting and non-regulatory levers drive consumption at home and abroad. For decades, the government has successfully maintained a position of active support without interference (United Nations, 2024).

On the regulatory side, domestic broadcasters (terrestrial, cable, satellite) are subject to programming rules in the Broadcasting Act and its Enforcement Decree, with compliance assessed at licence renewal. Operators contribute to the Broadcasting and Communications Development Fund, which supports sector initiatives. The Korea Communications Commission (KCC) also operates a Media Diversity Committee that develops cross-media influence indices and conducts diversity research.

However, these obligations apply to broadcasting operators rather than streaming services. Online services are not subject to formal prominence rules governing placement or visibility; each provider determines content presentation independently. Oversight of online services rests primarily on a self-classification regime under the Film and Video Promotion Act. While public debate about algorithmic transparency has intensified, no specific recommendation-engine regulations are currently in force.

Korea's discoverability strategy therefore leans heavily on promotion and market development. MCST and KOCCA coordinate export programs, organize participation in international markets, and broker partnerships with global services. In 2024, KOCCA reported roughly KRW 1.2 trillion in overseas broadcasting and video export consultations, underscoring the scale of outward-facing activity and its role as a visibility

engine. These initiatives are paired with domestic production support budgets and new distribution channels established through agreements with major online services (KOCCA, 2025). Copyright and enforcement policy are treated as foundations for sustained discoverability, ensuring that monetization pathways remain intact when content reaches global platforms (United Nations, 2024).

Facilities and infrastructure amplify supply that can surface on platforms. This physical infrastructure is complemented by a network of campuses, hubs, and specialized centres that support training, incubation, and convergence content prototyping. Human-capital programs further embed discoverability by raising the quality and volume of works that recommendation systems can surface. KOCCA's Creative Talent Partnership Program nurtures talent across genres; a memorandum of understanding with Netflix supported short-term production and post-production courses for more than 1,100 participants in 2024. Dedicated OTT-oriented graduate training and mentoring reinforce these pipelines, while program design often requires applicants to articulate promotion strategies that are evaluated during selection (KOCCA, 2025).

Financing tools reduce risk and crowd in private capital for production and promotion. Policy finance for 2025 includes KRW 1.02 trillion in content funds, KRW 380 billion in guarantees, and KRW 13 billion in low-interest loans, building on a fund-of-funds architecture that reached KRW 790 billion in 2023 (KOCCA, 2025). A public Content Value Assessment system, administered by KOCCA, provides standardized valuation to inform lenders and investors and to expand loan and investment opportunities for promising content companies (United Nations, 2024).

A recent policy signal, the Hallyu (Korean Wave) Industry Promotion Act enforced from April 2025, further institutionalizes cross-ministerial coordination for cultural promotion. The statute supports joint expos, "Korea 360" showcases, and marketing measures designed to increase distribution and consumption of Hallyu-related content and products, complementing the market-development orientation of discoverability policy (KOCCA, 2025).

For Canada, the lesson is to maintain targeted and flexible broadcast requirements where they work and to build out the promotional and financial architecture that enables domestic content to be surfaced by services, including those beyond direct regulatory reach.

6.2 Industry's perspectives on the Canadian framework

This section summarizes the insights gathered through consultations on the challenges and opportunities of Canadian content discoverability specific to policy and regulation. Across stakeholders, concerns were raised about limitations of existing frameworks, impact of global competition, and the lack of flexibility and support in marketing and promotion. This section also highlights specific approaches and challenges within Quebec's market.

Historically, regulation has focused on broadcaster inputs: spend on Canadian content production (CPE and PNI) and exhibition of Canadian content (both the total number of hours and the time of day). Additional reporting requirements such as total audience and investments relative to linguistic and demographic cultural objectives have also been implemented. These measures have contributed to the development of the Canadian audio and audiovisual production industries. This approach, within the context of a one to the many, performance-focused model was logical. Today's broadcasting system, with the multitude of programming choices available to Canadians is now an audience-demand-driven model. The desired outcome remains the achievement of the central tenet of the *Broadcasting Act*, but the means to achieve that outcome are driven by a different model.

Global audiences, including Canadians, technically have access to Canadian content anytime, anywhere, any screen, but are they watching it? Can they find it? Do they know it exists? Taking an outcome-focused approach to solve for discoverability means we need ask how do audiences in today's fragmented and infinite marketplace decide what to watch and what to listen to? What inputs are required today for Canadian companies

and creators to successfully attract Canadian and global audiences to their content? In the highly competitive global market, production value is critical, but so is audience engagement. Investment in audience and content right through the production lifecycle for both audio and audiovisual industries is critical to local and global success.

Broadcasters and streamers each collect data around audience behaviour. In some cases, streamers are collecting detailed information about what, when, where, and how people watch content. This information about audience behaviour serves both the broadcaster and the streamer business decisions and capacity to earn revenue from subscriptions and advertising. It is information that could be leveraged to enhance audience development – marketing and promotion of Canadian content so that audiences demand or seek that content, which in turn contributes to influence algorithmic prominence of that content.

In consultations, broadcasters, streamers, producers, and creators alike confirmed that they invest (whether financially or creatively) in content that they anticipate will interest an audience. Broadcasters and streamers also noted that they are more likely to direct marketing efforts to content with confirmed audience.

Summary of opportunities and concerns

As shared in consultations, there is a disconnect between how Canada’s current regulatory system is structured and how discoverability realistically occurs.

Broadcasters’ policy perspective

Broadcasters emphasized that within the current landscape, they are dependent on advertising revenues that fluctuate with broader economic conditions and tend to decline in times of uncertainty. Ad-supported tiers on streaming services have further migrated advertisers away from traditional broadcasting. They also underscored that CPE funds are not permitted to be used for marketing and promotion activities. Broadcasters argue that if marketing and promotion were eligible CPE expenses, it would provide a

baseline of funding for promotion each year, reducing the sole dependency on advertisers and global economic cycles. Broadcasters also advocated for flexible incentives rather than strict quotas (e.g., higher levels of Canadian content triggering lower cash contributions), though some industry associations and creators stressed that a more constraining regulatory framework is necessary to see notable results and curb market logics that penalize local content.

In consultations, broadcasters suggested developing a local availabilities mechanism similar for broadcasting undertakings (BDUs) that would require streaming platforms to promote Canadian programming as a means to support discoverability of Canadian content. Although broadcasters support this kind of mechanism, they also noted current restrictions that limit local availabilities to first-run Canadian programming are problematic in a digital world where content is consumed based on individual schedules and platform viewing choices. What was “first-run” on a Canadian streaming service, may in fact be “new” for audiences on the linear services. Since audiences often discover content after cultural momentum and buzz builds, sometime well beyond initial release, this restriction undermines local availabilities effectiveness. Broadcasters stressed greater flexibility in applying local availabilities, particularly to peak audiences’ awareness beyond first-run. They stated that audiences are less and less likely to engage in appointment television, and that viewership take time to build beyond launch.

In the music industry, Canadian artists’ music is often excluded as Canadian content because, per the MAPL system, their music is not adequately Canadian (e.g., because of foreign collaborators, recording location); this is especially true as Canadian artists achieve more popularity and global success. There is a sentiment in the music industry that the current MAPL system doesn't reflect modern collaborative music creation and penalizes successful Canadian artists who work internationally, hindering export strategies. Commercial radio is particularly vulnerable to this problem, as they often struggle to hit their quota of 35% Canadian content while keeping their listeners engaged without being able to leverage the most successful Canadian acts.

Commercial radio entities report that they have an easier time filling 10–15% of their Canadian content quota with music that keeps their audiences engaged, but struggle to reach the 35% Canadian content threshold without driving their listeners away to streaming options. They maintain that without robust audiences, commercial radio cannot contribute to discoverability no matter how much Canadian music they play. These entities observe an imbalance in the competitive market between linear broadcasting and user-driven streaming that are not bound by the same regulations.

The same is true in satellite radio, which is increasingly seeing higher listenership through their user-driven streaming options than their programmed radio content. However, they face overlapping radio regulations on their streaming activities (e.g., limits on local content) that often hamper their competitiveness with streaming platforms that face no such limitations.

News organizations' policy perspectives

News organizations stressed that appointment viewing has declined significantly, as more audiences consume news via social platforms. Younger audiences are not adopting the traditional news consumption habits of waiting for a linear broadcast, while older audiences increasingly consume online. To retain audiences, news providers are devising strategies like developing FAST news channels, prioritizing digital-first publishing, experimenting with YouTube strategies, and integrating news into streaming platforms. Despite these efforts, they are challenged by shrinking advertising and subscription revenues and increasing marketing costs. Technological shifts present additional risks. AI-driven search engines can scrape and summarize news articles from Canadian news, diverting from publishers' websites and undermining their reach to audiences. Consultations emphasized that the phasing out of AM radio by car manufacturers poses additional discoverability challenge as AM radio is predominantly news. While FM radio is still viable, newer vehicles include streaming services that steer listeners away from traditional radio.

Stakeholders emphasized that interventions to protect Canadian journalism and news media must also focus on discoverability and promotion. News providers also underscored the value of local availabilities but acknowledged they are not a cure-all solution. Participants repeatedly stated that ensuring the discoverability of Canadian news is not merely a market issue but one of democracy and sovereignty.

Production sector's policy perspective

Stakeholders involved in the production sector highlighted the gaps in the current regulatory landscape, particularly concerning unscripted content (e.g., reality shows, game shows). Despite high audience demand and engagement, these formats are excluded from the Canadian content point system. This exclusion leaves a significant portion of popular and in-demand content unsupported and unrecognized.

Concerns were also raised around the new proposed point system, which does not include any credit or consideration for marketing and promotion. Some stakeholders suggested that there could be an introduction of bonus points to incentivize investment in promotion. They maintain that this inclusion would recognize the importance of discoverability within Canadian production sector.

Streaming services' perspectives

Streaming services representatives emphasized that their Canadian content investments are driven by commercial potential and global marketability, rather than regulation or quotas. They maintain that audiences cannot be compelled to watch content through quotas, and that misaligned regulatory levers can harm Canadian production, especially within their algorithms. For example, if a service is required to recommend Canadian content that does not match users' preferences, it may generate a negative rating that ultimately pushes the content further down in visibility, reducing its chance of reaching more aligned audiences. Most consulted parties acknowledged that the CRTC would likely have limited capacity to interfere with foreign streamers' algorithms to enhance discoverability.

Streaming services in both the audio and audiovisual sectors assert that any regulations aimed at streaming should not reflect those currently imposed on broadcasters and should remain flexible based on business model. They assert that imposing quotas can unintentionally reduce the amount of Canadian content that is created. If they are required to dedicate a fixed percentage of their output to Canadian content, companies may respond by reducing their overall output rather than increasing their Canadian programming. It is their opinion that that fixed quotas can create a more homogenous content pool and hurt Canadian producers by limiting opportunities and reducing variety. Instead, streamers advocated for flexibility. For example, music streamers maintained that they want to be seen as partners in discoverability by continuing to invest flexibly in the music ecosystem through sponsorships, events, and artist development programs rather than regulatory mandates.

Kids' and youth perspectives

Kids' and youth content producers and broadcasters face their own unique challenges when it comes to discoverability and monetization. Children and adolescents are increasingly consuming content from "outside" of the traditional industry. There is a high volume of kids' and youth content creators on YouTube and other channels that attract massive audiences. The market for kids' content is extremely global and competitive, and generally the origin of the content is irrelevant to young audiences. For Canadian content producers, the challenges with kids' content are compounded by the restrictions in children's advertising, especially on YouTube, limiting their potentials for revenue. While these restrictions are incredibly important in protecting children, they reduce rights-holders' ability to sustain, as they rely on advertising revenue.

Canada does not have dedicated privacy rules for children. In the absence of specific legislation protecting children, individual platforms adhere to their own policies, or default to COPPA, the US children's online privacy act. The Office of the Privacy Commissioner of Canada has recently completed an exploratory consultation for a children's privacy code, but no legislation exists yet.

Stakeholders emphasized that supporting kids' and youth content discoverability is critical because it shapes lifelong consumption habits and fosters shared cultural references. Future policy will need to strike a balance between protecting young audiences from predatory advertising practices and ensuring that Canadian content creators can financially sustain their work in a highly competitive market.

"If we lose youth audiences, we lose the future. The CRTC has a role in creating Canadian consumption habits."

- Broadcaster

Other policy considerations

Audio industry stakeholders highlighted the often-overlooked role of Canadian screen composers and original soundtracks. These works are rarely promoted independently, despite their importance to audiovisual productions. There is a call for more support for Canadian composers' career development and incentives for producers to commission Canadian music or select Canadian songs, which could foster cross-promotion between the music and screen sectors.

Canadian audio stakeholders mentioned they would welcome the participation of foreign services on the board of funding bodies and key organizations of the broadcasting ecosystem. This way, foreign streaming services would also have a say in the way contributions are redistributed, as broadcasters do currently.

Creators, industry associations, broadcasters, and funding bodies all underlined the many ways Canada could improve discoverability, beyond a regulatory approach. Education was identified as an important mechanism; creating (Canadian) consumption habits should start in schools and with outreach to newcomers.

There are shared duties across the production value chain as discoverability stems from a common metadata layer that everyone feeds: producers deposit baseline records, and distributors and others enrich them so the data becomes a sectoral common good, not a private asset. That shared layer needs a neutral steward to manage rules, continuity and access over decades, treating cultural data as priority public-interest infrastructure. The task is not to “fight big tech companies,” but to ensure Canada holds an authoritative copy of its own cultural data, building collective leverage and sovereignty through modern, ethical governance.

Overall, it seems that the substantial challenge of discoverability of Canadian content can only be tackled with a shared-responsibility approach matched by pooled resources. With more collaboration opportunities, clear roles, broad guardrails, and common KPI metrics, pooled campaigns and initiatives can sequence efforts window-to-window, sustain momentum longer, and push into underserved regions/languages that single players can’t afford on their own.

The regulatory response in Quebec: discoverability of French-language content as a right

It appears that Quebec is further advanced in its exploration of discoverability mechanisms than the rest of Canada. Key stakeholders including industry associations, funding bodies and regulators have been coordinated and vocal on this issue for many years. Several initiatives have already been implemented to tackle the challenge of discoverability in the digital era, not only in the audio and audiovisual industries but across the whole of the cultural sector (e.g., publishing sector).

Discoverability of French-language cultural works is a key objective of Quebec’s Digital Cultural Plan (visibility being defined as a core orientation). Initiatives like Métamusique have directly emerged from this Digital Cultural Plan and strategic investment and policy making.

Métamusique, developed under Quebec's Digital Cultural Plan (Measure 111) and supported by SODEC, focuses on building shared metadata standards and infrastructure for the audio sector. By ensuring that Francophone works are properly identified and categorized, this initiative improves their discoverability across digital platforms. A similar initiative, Panoscope, is in development for audiovisual works. While collaboration in the audiovisual sector is more complex due to market dynamics and regulatory considerations, the groundwork laid by Métamusique provides a promising model. Initiatives like MUSIQC (see case study in Section 5.2) show how community-driven, human-curated platforms and strategic campaigns and investment can improve content discoverability through a local lens.

Quebec's comparatively strong performance in discoverability efforts is also underpinned by a robust, government supported cultural infrastructure and a long-standing star system that nurtures and elevates local talent. This system is backed by media, broadcasters, and institutions, and facilitates the promotion of local audiovisual and audio with strong cultural ties to Quebec, Acadian, and other French-speaking communities. In contrast, other parts of Canada often lack equivalent promotional ecosystems, making discoverability a greater challenge.

However, even within Quebec, discoverability faces structural challenges. A significant portion of French-speaking audiences is bilingual and consume English-language content that is often more dominant and readily accessible on global platforms. The consumption of content across languages presents additional hurdles for French-language content to compete for attention, particularly among younger audiences (see Section 2.4).

In response to growing discoverability concerns for French-language content, Quebec has reinforced its ties with the Francophone community. For instance, a joint mission from France/Quebec reiterated the importance of discoverability for cultural sovereignty and the necessity to address this challenge from different angles and how collaboration will drive success (Ministère de la Culture et des Communications du Québec, Ministère de la Culture de France, 2020).

In 2025, the Quebec Government introduced Bill 109, an Act to affirm the cultural sovereignty of Quebec and to enact the Act respecting the discoverability of French-language cultural content in the digital environment, which seeks to embed discoverability of Francophone content into law. Citing the Canadian Charter of Human Rights and Freedoms, Bill 109 intends to enshrine discoverability and access to original French-language cultural content as a right. The Act requires designated digital services and manufacturers of smart TVs and connected devices to ensure their interfaces provide access to platforms that meet government-set presence and discoverability criteria for original French-language cultural content. It also requires these manufacturers to provide access to government-designated viewing platforms that offer original French-language content. Furthermore, the Act lets the Government set regulations that (1) define what counts as “original French-language cultural content” and (2) require digital platforms to offer a specified amount or share of such content (including content available in French). It also allows the Government to authorize the Minister to make agreements with services that establish alternative measures in place of the Act’s or regulations’ standard obligations (National Assembly of Quebec, 2025).

Together, these initiatives reflect a strong approach which now combines industry initiatives, strategic investments, collaboration, and a regulatory response – a multi-faceted proactive perspective that appears to be lacking, or slowly gaining traction, in other parts of Canada.

7. INDIGENOUS MARKETS AND DISCOVERABILITY

Indigenous creators and broadcasters continue to face significant challenges in making their content discoverable. The shrinking distribution environment, along with limited funding for promotion, has made it increasingly difficult for Indigenous creators to gain access to the visibility and opportunities they need to reach wider audiences.

Systemic barriers, including underrepresentation in key industry roles and a historical lack of access to funding, infrastructure, and distribution channels, further compounds these challenges. Today, there is little Canadian content, let alone Indigenous Canadian content, available on leading (foreign) audiovisual streaming services.

Indigenous rights-holders are therefore developing their own models of discoverability. While their primary audiences are often Indigenous communities, there is also a strong desire to reach non-Indigenous viewers to expand understanding of Indigenous perspectives and to grow advertising potential and visibility. Efforts include partnerships with in-flight entertainment providers, FAST channels, and social media distribution.

To reach their own communities, Indigenous creators often rely on direct, grassroots methods. This includes touring films in-person to Indigenous communities, self-distribution, and screening events on reserves or in rural areas where mainstream channels may be inaccessible or irrelevant. Social media is also being leveraged, with some broadcasters uploading catalogue content to platforms like YouTube.

Many of these initiatives require significant time and resources, and may not be profitable, but they often have lasting impacts on the communities and individuals that are reached. As such, Indigenous creators and broadcasters are drawing from the same toolkit as other creators, but they are doing it facing additional structural barriers.

“Success” for the discoverability of diverse content, and Indigenous content in particular, cannot be measured solely by traditional industry data and metrics such as view counts or commercial performance. The impact of discoverability efforts, such as language preservation, cultural affirmation, and reclamation of Indigenous sovereignty in storytelling, needs to be celebrated as well (see Section 9 – Defining Success).

Broadcasters like APTN often greenlight projects based primarily on their cultural relevance and their role in revitalizing Indigenous languages, many of which are critically endangered. Indigenous discoverability requires a more expansive, culturally appropriate definition of visibility – one that reflects the broader social and historical role of Indigenous media in Canada.

North of North: local, authentic, and ethical

Co-produced by Iqaluit-based Red Marrow Media, APTN, CBC, and Netflix, North of North is the first of its scale filmed in Nunavut and led by Inuit creators Stacey Aglok MacDonald and Alethea Arnaquq-Baril. Already renewed for Season 2, the show follows an optimistic young woman embarking on a journey to reinvent herself in her tiny Arctic hometown, where everyone knows each other's business.

In Canada, North of North was the most-watched new series on CBC Gem since the platform's launch and among the top programs on CBC for the 25–54-year-old demographic. On APTN, it was one of the top-performing new scripted shows during Winter 2025 and the highest-rated new program on APTN lumi (APTN, 2025). Globally, upon its Netflix debut in April 2025, the show entered Netflix's global Top 10 (English-language) at No. 9 and made the top 10 in 27 countries, including Jamaica, Uruguay, Kenya, and New Zealand (Casemore, 2025).

Producing the series required building the first production studio in Iqaluit. The Indigenous Screen Office put up \$1 million to help build the studio, and then additional funding was secured from the Government of Nunavut and Iqaluit entrepreneur Cody Dean. The funding, combined with a loan, brought in a total budget of \$4.1 million to build the studio, which they co-own (Playback, 2025).

More than 300 Canadian crew members and 225 Canadian vendors (including more than 60 from Nunavut) worked on the production, which spanned 61 days and 20 shooting locations across Nunavut and Toronto. Overall, North of North had more than \$23 million in Gross Value Added Impact (Netflix, 2025).

In addition, the show also fostered deep community involvement. Inuit participants engaged in a mentorship program, gaining hands-on experience across multiple

production roles. Creators also prioritized sourcing traditional Inuit designs and artisans for costumes, affirming cultural authenticity and local economic engagement (Playback, 2025).

North of North is a powerful example of locally and ethically produced Indigenous content that resonates with diverse global audiences. However, without cross-platform partnerships with Netflix and shared creative control with non-Indigenous stakeholders, North of North may not have found the success it did and deserves.

8. DIVERSE MARKETS AND DISCOVERABILITY

Pathways to discovering content are shaped by language, region, culture, and identity. For creators from equity-deserving communities, discoverability is about more than just visibility; it is also about fair access to audiences, resources, and creative opportunities. Participants across stakeholder groups emphasized that discoverability is not simply about whether content is available, but how it becomes visible, who it reaches, and where it appears. Effective discoverability requires equity-driven approaches that reflect the lived realities and cultural contexts of diverse communities.

Traditional marketing and promotion strategies tend to be top-down and do not always reflect how diverse audiences actually find content. Community-based methods like word-of-mouth and community screenings often play a bigger role, yet these grassroots efforts are rarely recognized or supported at the industry level. Organizations like the Black Screen Office are helping improve audience reach for Black creators through initiatives like the Black Creators Festival Initiative that supports participants to develop their projects as well as audience engagement strategies.

While approaches, investment (skill development, infrastructure, community engagement, and involvement), and success metrics must be tailored to the specific realities of equity-deserving communities, the core driver of discoverability remains the same: authentic and engaging content. As such, consulted broadcasters and streaming services indicated that they do not fundamentally differentiate their rationale when working with equity-deserving creators: they want to know whether a piece of content has potential to reach its audience – no matter the size – and to create and sustain engagement.

Immigrant and cultural communities

Immigrant and diaspora communities are crucial in connecting Canadian content to global audiences, particularly in areas where formal distribution deals or market access

may still be limited. Music and film are often shared through informal channels and word-of-mouth, and the success of such content internationally is not always fully recognized or understood by domestic stakeholders. There is often a disconnect between what constitutes "success" within Canadian policy or funding frameworks (e.g., domestic charts, box office, or award wins) versus what success looks like in international or cross-border contexts where things like cultural relevance, identity, and global connection also matter, even if they are harder to measure.

Global success of Canadian Punjabi music

Canadian Punjabi music represents a paradigm shift in how we understand and measure success in an increasingly borderless music market. Artists like Karan Aujla, Ikky, and Channi Nattan are achieving global reach from Canada, regularly topping Indian music charts. Their success abroad challenges traditional notions of what constitutes discoverability and prominence for Canadian artists by locating their growth largely outside of the “mainstream” domestic market.

Karan Aujla's 2023 album *Making Memories* hit No. 1 on Apple Music in both India and Canada, simultaneously debuting at No. 5 on the Billboard Canadian Albums chart – the highest-ever Punjabi album debut in Canada. The album has now been streamed over two billion times globally, with Aujla becoming the first Punjabi artist to win the fan-voted 2024 TikTok JUNO Fan Choice Award (The JUNO Awards, 2024).

Collaborating with Aujla on *Making Memories*, producer Ikky also skyrocketed to recognition in 2023. He offers that "Punjabi Canadian music is a big export in Canadian music right now." Through his writing and collaborations, Ikky strives to create songs “that can live in both worlds,” referring to audience appeal in both Canada and India and lyrics written in both English and Punjabi (Zhu, 2025). Ironically, achieving international validation has created a new domestic challenge: Ikky explains that “first to India, we had to prove Canada is the home of Punjabi music. Now that we've succeeded, we have to prove to Canada that this is Canadian music” (CTV News, 2024).

Surrey-based Channi Nattan likewise has experienced variable success in Canada. His breakthrough came in 2024 with the viral hit “Daku,” which has amassed over 1 billion streams on Spotify in India and over 350 million YouTube views. He notes the growing popularity of Punjabi music not just in India, but around the world: “every major label is looking at Punjabi music... [it] is in boardrooms. It's in ad campaigns. It's in spaces

we were never seen before” (Mendonza, 2025). The launch of 91 North Records, a joint initiative by Warner Music Canada and Warner Music India, demonstrates this growing cross-border focus on Punjabi music in the industry growing out of Canada.

Industry associations and funding bodies have highlighted the significant discoverability opportunities with immigrant communities and newcomers, particularly by establishing early consumption habits among younger generations and fostering shared cultural references that anchor Canadian Content in everyday life. In parallel, the growth of international co-productions allows Canada to leverage existing cultural ties and foreign star systems: binational Canadian creators and talent (especially those of Asian, African, Latin American, and Middle Eastern heritage) can pull audiences from both sides of those markets (e.g., Canadian talent of Asian heritage attracting viewers across the Pacific). Done well, these strategies build durable, cross-border fandom while strengthening domestic engagement, stimulating discoverability of Canadian Content globally.

Accessibility as a cornerstone of discoverability

Accessibility is a critical and often overlooked factor. Discoverability doesn't mean much if content is not accessible to all audiences. Stakeholders noted that accessibility needs to be reflected in legislation, policy, and program design, and prioritized as a part of any national strategy to improve the discoverability of Canadian audio and audiovisual content.

Under the *Accessible Canada Act* (2019), federally regulated entities, including broadcasters and certain digital media companies, are required to proactively remove barriers to access. More recently, the CRTC launched consultations as part of its implementation of the *Online Streaming Act*, seeking public input on how to ensure programming on digital platforms is accessible to all Canadians (Canada, 2024).

However, compliance remains uneven, especially in the digital streaming space. While some streaming services include features such as closed captioning and audio description, these are often inconsistently applied, difficult to locate, or of variable quality. On many platforms, metadata tags identifying accessible features are either missing or not integrated in a way that supports user-friendly search or filtering. As a result, even when accessible content exists, it remains hidden or hard to navigate, especially for users with specific access needs.

Beyond digital platforms, industry events and festivals that are a key part of discoverability often lack basic accessibility standards, planning, and infrastructure. Barriers may include inaccessible venues, a lack of ASL interpretation, limited seating accommodations, or program guides that are not screen-reader compatible. Even when accommodations are available, information about them is often poorly communicated or difficult to find in advance.

There are, however, emerging efforts to address these gaps. The Disability Screen Office (DSO) has launched several important initiatives:

- The Screen Festival Accessibility Program is beginning to address this gap by working with festivals to develop national standards and practical tools to improve accessibility.
- The Production Accessibility Role Initiative aims to embed accessibility directly into the production process by creating a formal managerial role responsible for ensuring access across the full lifecycle of a production.
- The Disabled Producers Lab, delivered in partnership with Women in View and the National Screen Institute, supports disabled creators and integrates accessibility planning into the development of new projects.

Some festivals, such as imagineNATIVE and the Inside Out 2SLGBTQ+ Film Festival are also demonstrating leadership by offering open or closed captioning, ASL interpretation,

sensory-friendly screenings, accessible venues, and inclusive communications (imagineNATIVE, InsideOut).

9. DEFINING SUCCESS

Measuring the success of discoverability is multifaceted, with no single definition applying across all stakeholders or markets. While every stakeholder in the content production ecosystem has an interest in the discoverability of the content that they support, success for their specific business model is measured differently one from the other and even in a variety of ways by each.

Multiple bottom lines

Market-based metrics like subscription numbers, ratings, and financial performance offer quantifiable indicators of success. Social impacts including cultural resonance, linguistic sovereignty, civic engagement, and relevance to specific communities tend to be qualitative and more difficult to measure, yet are essential demonstrations of fundamental policy objectives. Additionally, success can also be personal, measured through achieving an artistic milestone or simply through the act of creative expression. The successful discoverability of Canadian content is not a simple volume metric. In Canada's modern landscape, any definition of success regarding the discoverability of Canadian content must consider metrics that are market-based, social (including cultural, linguistic, and community-specific), as well as personal.

Adding to the complexity of a modern understanding of discoverability is that both domestic and international visibility – global reach – have become equally crucial to success. While all stakeholders agree broadly on the types of metrics, they weigh them differently – what a global streaming service counts as a success may differ with that of a Canadian broadcaster, or an independent Canadian filmmaker or musician. Across the board, there is consensus on the importance of metrics in understanding audience behaviour and shaping strategy, but the lack of standardized processes, transparency, funding, and communication present ongoing challenges.

The following items illustrate some of these varying points of alignment and divergence between different stakeholders.

- How broadcasters define success: Audience reach, retention, and revenue growth (ads/subscriptions) along with meeting any cultural obligations inherent in their mandate and business model – across linear, on-demand, and streaming services with a focus on Canadian audiences, which may be further categorized by language and/or community affiliation (as a result, target audiences can be relatively modest in number)
- How producers and creators define success: Greenlights/projects, favourable financing terms and IP retention, audience/fanbase traction, long-tail value, recognition (festivals, awards), and sustainable careers/businesses. Here, too, target audiences may be linguistically, culturally or community specific with national and international exposure objectives.
- How international streaming services define success: Subscriber growth/retention, ad revenue (when applicable), audience engagement efficiency, and compliance while maximizing catalogue ROI (when applicable) with a focus on international reach while serving localized audiences.
- How funding bodies, support organizations, and regulators define success: Cultural outcomes (prominence, diversity), market outcomes (consumption, export), and systemic health (talent, sustainable industry, IP retention) with a Canadian industry and audience first objective, which can sometimes be bolstered through international export activity.

With these stakeholder-specific definitions of success in view, it becomes clearer why discoverability matters to each profile and how they approach it based on how discoverability falls in line with their general objectives.

Take streaming services: their core objective is revenue growth tied to the user base (subscription and ad models), which means acquiring new subscriptions and minimizing churn. To minimize churn and retain subscribers, discoverability is crucial and largely

driven by internal proprietary mechanisms. These mechanisms are designed not only to surface what users actively seek (in an intuitive manner) but also to redirect them to adjacent titles they are likely to enjoy, thus extending both the number and the length of viewing sessions (length of viewing time is especially critical in the case of ad-tier subscriptions). Content performance – its discoverability within the platform – is both measured and managed through the funnel of impressions, clicks, starts, completions, and repeats/likes, alongside satisfaction and search success that represent audience engagement.

To acquire subscribers, discoverability of content shifts to external efforts of promotion, and demand generation (Section 4), drawing attention to marquee titles and, by extension, to the broader catalogue and brand. Here, content performance indicators emphasize reach, engagement, and conversion from awareness to sign-up. In short, even when a stakeholder's success seems straightforward (e.g., revenue via user growth) the touchpoints where discoverability drives that success are multiple, spanning both on-platform and off-platform activity.

At the other end of the spectrum, producers and creators define success first as getting the work seen or heard, and on its own terms. Copyright, ownership, and control of IP matters – retaining the rights to exploit the content they produce means creators and producers can make stories and music that is authentic; it also means that they are more likely to see an economic return on their work. Artistic freedom and recognition matter: festival selections and participation, critical reviews, awards and nominations, and peer esteem are signals that the project landed as intended. In addition, creators noted that success is also economic viability in an unpredictable industry: building a sustainable business, retaining exploitable rights, and earning a living wage across all phases of content creation. Accordingly, creators track a different mix of indicators because the goal is not only attention, but a financially sustainable career.

As one moves further along the lifecycle, the vantage point widens. Creators tend to focus on the performance of a specific work and the fanbase it builds. Larger production

companies, especially those with successful series, do have the capacity to anticipate and develop additional materials across multiple platforms tied to one IP (e.g., Murdoch Mysteries, Heartland). Broadcasters and streamers, by contrast, view each title in the context of a larger ecosystem: Does this fill a gap in the catalogue? How does the target audience or community of interest overlap with (or expand) our user base? While streamers seek potential headline success, they also consider the portfolio value: how a work lifts engagement across adjacent titles, strengthens genre depth, attracts new audience cohorts, reduces churn, and ultimately improves the performance of the entire service, not just the one release. A strategic discoverability success framework might recognize the different goals of each component of the broadcasting system and focus measurement on the shared objective of building audience engagement.

“Measuring” discoverability

For regulators, identifying fair, standard, and transparent metrics of success represents a significant challenge. Defining “what is discoverability?” is in and of itself a conundrum; identifying the data points to track (and the means to do so) remains a subject of ongoing debate. While “it is often said that ‘it is virtually impossible to assess or measure the discoverability of cultural content on the Web’” (CDCE, 2020), due to data opacity and the complexity of the concept of discoverability itself, recent explorations such as the work conducted by Quebec-based the Laboratoire de recherche sur la découvrabilité et les transformations des industries culturelles à l’ère du commerce électronique (LATICCE, 2021), or the prominence model developed by Arvest (see case study below), point towards the emergence of new tools. These indexes and measuring tools may offer practical solutions to assess the impact of policies intended to enhance the discoverability, promotion, and prominence of Canadian content.

Throughout the consultations and research, many different ways to define, measure, and interpret “success” were brought to light. Below is a set of indicators that stakeholders track (or could track) to assess the performance of discoverability strategies. These

indicators are shared below as examples of currently used tools for consideration and further exploration.

Because perspectives vary by role and mandate, so do the metrics and their use cases. Some indicators are better suited to regulators (e.g., to monitor compliance and assess fair participation across the content lifecycle), while others function as operational performance metrics that help creators, producers, and services understand and optimize the effectiveness of their discoverability efforts.

Presence: is Canadian Content there?

- Share of domestic content in catalogue

While this is one of the approaches implemented by European Union members, catalogue-share requirements might prove to be a complex tool to navigate. For instance, when thousands of new titles are uploaded every day to music platforms from artists around the world, how could music streaming services actually maintain localized quota without limiting audience access to a broad diversity of global talent? Moreover, presence does not necessarily imply prominence: Canadian content, while still technically available, might end up lost in a sea of content if not surfaced. This indicator, while informative for regulators and industry stakeholders, is not sufficient to ensure prominence and ultimately access.

Promotion: are audiences being invited to watch/listen Canadian Content?

- Spend on promotion of domestic content

Expanding production spending requirements to include investment in specific promotional activity related to Canadian content such as audience research and development (market intelligence, testing, piloting), marketing (traditional and online),

launch events, as well as the production of promotional material (e.g., behind-the-scenes).

- Cost per qualified intent

This indicator could be used, most notably by broadcasters, online services, producers and labels, to measure the efficiency of their marketing investment upstream of the official launch of a title. A number of tools are available to content creators and rights-holder to encourage audience to engage with content before launch (pre-saves, watchlist adds, sign-ups, etc.). As such, the measure of promotional spend/qualified signals could illustrate the success of early marketing investments.

Prominence: is Canadian content surfaced?

- Device/app availability index

An index could potentially gauge how easily audiences can access a service across hardware and other interfaces. It could blend coverage (presence on major smart-TV OS, set-top boxes, game consoles, mobile OS, in-car systems), placement (pre-install status, app-store ranking, home-screen rows, remote-control buttons, voice-assistant invocation), and quality of access (login/onboarding friction, update cadence, performance, accessibility features). Such an index could reveal distribution gaps for Canadian-owned services, informing prominence/regulatory assessments. Currently, no standard availability index is used by regulators across the world, even though some companies offer similar proprietary tools (e.g., Looper Insights).

- Impression share of domestic content

For creators and industry associations, recommendation parity is a core lever for the prominence of Canadian content. A practical way to measure impressions would be to

count every exposure where a user is presented with a Canadian title by a service (on any surface, including homepage rows, carousels, notifications, etc.) before they choose to play anything. In digital marketing terms, this approach treats an impression as a recommendation exposure, separate from what the user actually clicks or plays. Platforms can then report a simple, outcome-focused ratio: impressions of Canadian titles divided by all recommended impressions (Brix Labs, 2020). A similar construct could be duplicated for Francophone or Indigenous works. The CRTC could then require services to reach a certain threshold for impressions shares, moving towards increased recommendation parity between domestic and foreign content.

- Homepage placement score

As illustrated by the Arvester case study below, homepage placement score is a variation of examining impression shares.

Arvester: measuring homepage prominence

Arvester, a Paris-based consultancy, has developed a methodology to measure the prominence of titles on video streaming services. The tool is now used by the French broadcasting regulator Arcom and national audiovisual agency CNC. Where the audience measurement company Médiamétrie already provides the volumes and shares of different categories of content in those catalogues (presence), Arvester contributes data that reveals the extent to which that content is visible on the interfaces of Netflix, Prime Video and Disney+ (prominence).

Methodology (Arvester, 2024)

Arvester has created a visibility score that ranks all thumbnails on a service's homepage based on how visible they are to the user.

The score (0 to 100) takes into account the position of the thumbnail in relation to the top and the left edges of the page, as well as its size on the screen. A score of 100 means that the thumbnail appeared at the very top of the page and filled the user's whole screen. The lower the score, the less visible the thumbnail was on the page.

Homepages analyzed are "clean" (i.e., not personalized). They correspond to the homepage a user would see when creating a profile for the first time.

Observations (Arcom, CNC, 2025)

Arcom and CNC drew upon Arvester's tool to measure the prominence of French content funded or partly funded through required contributions imposed to online

video services by the European AVSMD. A few observations were made on 61 titles examined on three foreign streaming services:

- Productions financed by streaming services regularly appear on their homepage.
- Some services will spotlight a selected number of these productions, especially when they finance a larger number of titles, while others might more consistently surface their local productions.
- Scripted series tend to be more visible than fiction features and documentaries.
- During the period under review, these 61 titles had a better prominence score than the overall catalogue of these services.
- Local productions financed by streaming services tend to be presented in geographical sections, genre sections or under “exclusive” or “original” collections, but less in “what’s new” or “top” sections.
- Overall, US productions are the most visible on Netflix, Disney+, and Prime Video. An Arvester analysis of these services in France in November–December 2024 concluded that while US productions have the highest visibility score (by a considerable amount), French productions ranked second or third, and, incidentally, Canadian productions ranked fourth or fifth (CNC, 2025).

Limitations

- The prominence score does not really account for surface variations from one service to another (e.g., Amazon Prime having a much longer homepage, thus listing more titles), making comparisons difficult.
- By using fresh homepages for its analysis, Arvester does not replicate the lived experience of most users who face a personalized home selection. Moreover, the prominence score does not integrate search results, another important prominence opportunity.

- While the Arcom and CNC report also examines the performance of domestic productions financed by streaming services and notes that these titles have proven to be successful on these services, there is no direct link made to clarify whether prominence actually led to consumption.
- Arvester has the resources to apply this prominence analysis to French licensed content, but the Arcom and CNC report focused the analysis on productions financed by foreign streaming services to evaluate the impact of the AVSMD.

Consumption: did audiences select and complete Canadian Content?

Consumption metrics show whether discoverability efforts are working by converting presence, promotion, and prominence into actual plays, completions, and repeat engagement. It would be neither practical nor desirable to regulate these outcomes: audiences ultimately decide what to watch or listen to, and no regulator seeks to prescribe taste. That said, a common set of consumption KPIs is invaluable for everyone else in the system. Producers, creators, and distribution services can use these signals to refine what they develop, how they package and market it, and which titles they surface, turning measurement into continuous improvement rather than blind compliance.

- Click-through rate (CTR) – clicks/impressions

CTR shows how effectively a title artwork and placement convert exposure into interest, building on the impression shares examined previously. CTR helps diagnose whether the packaging and context are compelling for the intended audience. Low CTR with high impressions suggests creative or placement tweaks, while strong CTR signals fit but does not guarantee play depth. It must then be paired with starts and completion (see below).

- Saves/follows

Saves (add to watchlist/library) and follows (artist/show/channel follows) capture intent beyond the moment. They are leading indicators of future consumption, algorithmic reinforcement, and campaign efficiency.

- Starts and completion rate

Starts confirm initial conversion from interest to viewing/listening; completion rate measures how many finish an episode, film, or track (or reach a defined threshold). Strong starts with weak completion suggest issues in pacing, opening hooks, or mismatch between marketing promise and the experience.

- Repeats and returns

Repeat plays and return sessions (users coming back to the same work or creator) indicate durable appeal and the shift from algorithmic “lean-back” to intentional, active selection. High repeat/return rates are a proxy for early fandom and predict word-of-mouth. This metric can be used to decide which titles merit additional marketing, playlisting, or prominence, and to prioritize spin-offs, seasons, or adjacent recommendations.

- Time spent (viewing or listening minutes allocated to works)

Time spent normalizes beyond raw starts to show depth of engagement with content. It aggregates consumption across titles and could reveal whether audiences are drawn towards Canadian stories and music.

- Market share

Market share could capture Canadian content's share of total consumption within a service, platform category (e.g., SVOD, radio, social video), or the overall market. It translates many upstream efforts into a single competitive outcome.

These sample indicators underscore the need for modern, standardized measurements that reflect today's digital, on-demand consumption. While most focus on streaming and platform analytics, it remains essential to maintain, and update, measurement in the linear broadcasting environment, where a significant share of the consumption (and discoverability) is still happening.

Some indicators can be self-reported by services (promotional expenditure). Others require independent third-party verification to protect user privacy and ensure standardization for comparability. Where direct access to raw logs is not feasible, privacy-preserving methods can be used: aggregated dashboards, differential-privacy noise on user-level data, automated crawlers that record interface placements at scale, and sampling to estimate exposure and placement frequency.

Finally, in considering discoverability metrics as a regulatory tool, broader cultural objectives and the realities of Canadian markets and communities must be layered into expectations, requirements, and target-setting. Indicators should not privilege sheer audience volume alone. They must also capture "fit" with the intended audience (e.g., within linguistic, regional, Indigenous, and accessibility communities) and the depth of engagement and impact. In short, success should measure not only how many people watched or listened, but whether audiences have access to and engage with content that resonates meaningfully.

10. NINE CONSIDERATIONS FOR CANADIAN POLICY AND INDUSTRY DISCOVERABILITY FRAMEWORK

Based on results of the consultation, learnings from other jurisdictions and forward-looking sector signals, Nordicity identified nine strategic elements that the CRTC and stakeholders across the Canadian broadcasting ecosystem could consider in designing the foundations for a robust Canadian discoverability framework. The audio and audiovisual sectors operate in an international marketplace, and foreign streaming services are recognized components of the Canadian broadcasting system. These realities put the emphasis on developing content with a global audience in mind without diluting Canadian and Indigenous perspectives and the diverse voices that coexist within Canada.

The strategic considerations presented below are those of Nordicity alone and do not necessarily reflect the views, policies, or positions of the CRTC or parties consulted.

1. Accelerate a sector-wide mindset shift from output-first to audience-first.

The core finding of this study is a paradigm shift: from “make to make” to “make to connect/engage.” Sustainable growth for Canadian content companies depends on designing for markets (domestic and international) rather than assuming that production alone fulfils the policy brief. Content that engages/connects with audiences is more likely to lead to sales and continued demand for (and financing of) content. In an environment where all audiences are effectively global audiences, the competitive question is no longer “Did we make it?” but “Who will watch/listen to it, how, and why?” That reframing puts audience at the centre of policy and practice when discussing content discoverability.

The audio sector is further along this path. It has absorbed a global mindset and lowered barriers to creation through home production and digital distribution, yet the discovery

bottleneck is acute. Canadian music continues to punch above its weight with world-class hits, proving the talent and craft are here, but those successes accrue to a small fraction of creators while the long tail struggles to convert limited visibility into sustainable income. According to creators and industry associations, this reality is even more acute for Francophone artists and Indigenous creators who feel invisible in a sea of content as they lack the resources to develop and engage with audiences over the long term. They also feel that they are being expected to deliver audience sizes that are unreasonable for their community reality: sometimes the “right” audience is more important than a large one. The lesson for policy is that audience-building capacity must be treated as core infrastructure, not a nice-to-have add-on.

Canada’s audiovisual sector matured inside a protected “walled garden” designed to reflect official languages, Indigenous peoples and their languages, and the diversity of Canadian communities. In today’s digital marketplace, the walls are porous, and the garden is global. Just like in the audio sector, traditional levers that incentivized investment in CanCon or positioned it to be found are necessary but no longer sufficient. Audiovisual producers must pivot from making content for services to making and selling IP with services and partners.

Historic levers that incentivize investment in Canadian content production, presence and prominence in the broadcasting system remain necessary but are no longer sufficient and require adaptation for the digital space, which intrinsically brings global competition for audience attention within the Canadian broadcasting system. Creators and rights-holders must pivot from making content for services to making and selling IP with services and partners.

Practically, an audience-first mindset means validating audience interest-IP fit and long-term financial opportunity early in the development phase. It also means negotiating to preserve exploitable rights, growing lifetime value across a slate/catalogue rather than optimizing a single title/album, and treating export readiness as a design constraint, not an afterthought. None of this displaces cultural objectives; it operationalizes them:

Canadian stories reach more Canadians, and the world, when they are built to compete for attention.

What Canadians make for Canadian audiences can and should succeed globally. The considerations that follow translate the audience-first mindset into potential actions that could support not only the production of content, but also development of content that audiences are likely to choose, complete, and return to. Discoverability is the result of an audience-first strategy, but not the end of the journey: it is the front door to actual consumption. When Canadian content is optimized to reach its intended audience, discoverability becomes easier, though never guaranteed (hence the need for complementary measures).

2. Achieve Canadian policy objectives and global success through Canadian ownership and control of IP and content delivery services.

In the audiovisual industry, the prevailing financing-in-exchange-for-rights approach is essentially a fee-for-service model that rarely leaves domestic companies with any control of the IP. This model forfeits the long tail: the ability to build franchises, re-license, adapt across formats, and compound audience (thus value) over time. Ultimately, the fee-for-service model negatively impacts the long-term viability and value of Canadian audiovisual production companies.

The audio sector faces a parallel challenge: Canadian artists, producers, composers, and engineers are global calibre, yet the independent ecosystem struggles to retain both talent and rights. As a result, much of the upside accrues elsewhere even when the spark starts in Canada.

In both sectors, sustainable Canadian companies are built both from making great work, and from owning and exploiting the underlying IP and relationships that flow from it. When Canadian companies have the resources to develop content, and audiences, at the

same time, they are in a better position to negotiate ownership, control, and potential sales of that content with broadcast and streaming platforms.

Canadian ownership of content is important in terms of ensuring the long-term sustainability of Canadian content creation companies and of creators' careers, in both the audiovisual and audio sectors. Canadian ownership and control of the services distributing content also plays a role in enhancing the discoverability, promotion, and prominence of Canadian content. These services include fully owned platforms such as Crave, GEM, and TouTV as well as Canadian- and Indigenous-controlled "front-ends" that curate content such as MUSIQC and Nikamowin. In each case, they engage with audience and contribute to promote Canadian content by making it easier to find for audiences looking specifically for a source of Canadian content. These services capture first-party audience signals, and shape the commercial story arc around a work, reflecting a Canadian perspective, sensibility, and context.

While Canada has a few audiovisual players with the scale to field competitive services, music has found it far harder to launch and grow compelling alternatives to foreign-owned platforms. In a galaxy of apps and interfaces, even the best Canadian alternatives struggle to be found, making access and prominence on devices a policy question, not just a marketing problem.

A modernized discoverability framework for the broadcasting sector might include measures relative to both Canadian rights retention and front-door access via online services and devices. With regard to Canadian rights retention, Canadian companies (and creators) would have a vested interest and a share in the performance of the content. The expertise and financial investment required to market content as well as the access to audience data and financial return would be shared by both producers of content and the platforms distributing that content and would contribute to develop Canadian companies' (and creators') understanding of global markets. In terms of online services and devices, a modernized broadcast system would consider easy access to Canadian-owned/controlled services across connected TVs, set-top boxes, app stores, voice

assistants, car systems, and mobile notably through regulatory arrangements. Several jurisdictions are exploring device-level prominence frameworks (Australia, Quebec through Bill 109). Canada might evaluate similar approaches suited to its markets and languages, with safeguards for user choice and accessibility.

Financing must reinforce this ownership logic. Public funds, tax credits, and levy-based programs should recognize commercialization and rights retention as value. This vision might mean better integrating audience development, versioning, dubbing/subtitling, and international packaging costs into production budgets, and rewarding projects and companies that retain Canadian IP and demonstrate audience traction. Complementary tools (completion guarantees, revenue-based finance, etc.) can crowd in private capital without forcing early rights giveaways, particularly for Canadian SMEs and independents. For music, where platform ownership is harder to achieve, options could include consortia and shared infrastructures that increase bargaining power and keep more value, talent, and fan relationships inside the Canadian ecosystem.

Simply put, the ideal framework would be: sustainable Canadian businesses control both the story and the storefront. Enabling Canadian companies to own and commercialize IP, and to secure device-level presence for Canadian services, would make cultural objectives durable. This is how Canadian stories could keep paying Canadian creators, how Canadian audiences could find Canadian works on purpose, and how Canada would compete and win in a global market.

3. Leverage the contribution of all components of the *Broadcasting Act* to enhance Canadian Content success at home and abroad.

Canadian private and public broadcasters have long operated inside a regulated system designed to advance both economic and cultural objectives. Global streaming services, by contrast, optimized first for scale in largely unregulated markets, so their default

commercial logic does not inherently prioritize Canadian stories or diverse voices, unless – or until – audience demand for such content is demonstrated.

Yet despite these different origins, the business models for broadcasters and streamers are converging: advertising and subscription now underpin both models, and bundling is common (streamer-with-streamer and, increasingly, streamer-with-broadcaster). In this interconnected market, one-size-fits-all approach risks missing how each service can best contribute to enhance the promotion, prominence, and discoverability of Canadian Content. When the ultimate goal is discoverability of Canadian IP and its creators, then flexibility means ensuring each investor, whether broadcaster or foreign streaming service, contribute towards improving visibility of that content using the mechanisms inherent in their business model.

While broadcasters and streamers initially had quite different revenue models, increasingly, they both seek, and secure, revenue from subscriptions and advertising. Various avenues could be explored to design more flexible conditions of service, such as focusing on an outcomes-based, case-by-case approach that would play to the strengths of various distribution platforms. This approach in turn would require holding each player to clear, transparent, and measurable results. Rather than prescribing identical inputs, service-specific requirements could align contributions with where each actor has real leverage through a transparent performance framework. The challenge would be to identify where incremental effort will make the biggest difference so that policy objectives are achieved across the ecosystem rather than within a series of silos.

A flexible approach requires clarity and accountability to ensure all components of the broadcasting system, public, private (including foreign streaming services), community, contribute to ensuring the central tenets of the Broadcasting Act are met. Public documentation of indicators of success with annual public reporting, comparable disclosures, and periodic reviews allows for corrective action in the event of under-performance. That accountability could extend beyond reporting on audience size to reflect the central policy objectives of the Canadian Broadcasting Act to ensure

Canadians and Indigenous people of all ages have the opportunity to create and watch Canadian-owned content in both official languages, across all regions, and including Black, People of Colour, people with disabilities, and LGBTQAI+ communities, and to provide a variety of programming. Connecting with the “right audience” is as valuable as connecting with a large audience, even within a global marketplace.

While broadcasters and foreign streamers have specific business objectives, their participation in the Canadian broadcasting system comes with responsibilities to contribute to the overarching policy objectives of the Canadian Broadcasting – flexible conditions of service that leverage the strengths of those various business models provides an opportunity to translate competing and interconnected business models into measurable promotion, prominence, and discoverability of Canadian content within Canada and the global marketplace.

4. Define relevant indicators of success; regulate measurement and reporting; focus on improvements; adjust and correct.

While definitions of success vary, all stakeholders in the audio and audiovisual industries have an interest in the discoverability of content – but not all are focused on Canadian content specifically. An effective discoverability measurement framework for Canadian content is guided by the cultural policy imperatives expressed in the Broadcasting Act while recognizing the opportunity to leverage the various components of the broadcasting system. While the definition of “Success” varies by role, market, and community, the framework could focus on a small set of system-wide indicators while allowing service-specific pathways to achieve them.

It is desirable that measurement continue to include the conventional broadcast system including the availability of all types of programming. A significant share of Canadians, including older Canadian residents, rural and remote communities, and lower-income households without reliable broadband, still broadcast to watch/listen content. Yet

audience data for smaller, community-serving broadcasters can be sparse or unavailable; in those cases, policy imperatives (e.g., linguistic duality, Indigenous languages, accessibility) may justify support even when audience numbers are hard to capture.

While inputs are still required to realize the objectives of the Broadcasting Act, the audience-demand-driven model requires rethinking when, what, and how those inputs are provided to ensure Canadian content—in all its diversity remains discoverable by a broad range of audiences.

Practically, a potential discoverability performance framework could organize indicators into four linked layers, building on (and modernizing) existing mechanisms such as CPE, PNI, and exhibition requirements:

- Presence – Is Canadian content there? Measured with catalogue shares.
- Promotion – Are audiences being invited? Measured with total spend in Canadian content development, and promotion investment.
- Prominence – Is it surfaced? Measured through the share of Canadian content impressions (content) and a device availability index (store fronts).
- Consumption – Did people choose and stay? Helpful for content creators and rights-holders to understand the performance of Canadian content and discoverability strategies. Measured through click-through-rate, starts/completions/repeats, saves/follows.

Intervention to invest in production of Canadian content would also still be required as audiences are looking for global-quality content. Increased investment in the audience (and content) development is key but so is increased investment in marketing and promotion throughout the content lifecycle. Ultimately, promotional investments drive audience to seek the content, in seeking the content audiences enhance the prominence of content and its discoverability.

In a global, algorithmically-mediated marketplace, flexibility is essential. The CRTC could regulate outcomes and transparency, not the specific workings of proprietary resources – especially for prominence, where dictating recommendation engine design would intrude on business models and raise competition and privacy concerns, but where tracking impressions of Canadian Content would provide a platform-agnostic tool. Focusing efforts on outcomes could give services the latitude to choose tools, provided they report comparable metrics and demonstrate improvement for Canadian content. In this policy scenario, the Commission’s role would be to work with services to identify how each can best contribute to enhance the visibility and success of Canadian content, set the yardsticks, require credible reporting, and trigger corrective action when results persistently fall short.

To make this approach workable, clear reporting rules would be required from all relevant services, with methodologies that can be audited. Where data are sensitive, privacy-preserving aggregation and third-party verification can protect consumers and competition while still enabling accountability. Given today’s data gaps (i.e., limited data on prominence and performance of Canadian Content), an iterative first phase is advisable: establish baselines, focus on measurable improvements over fixed quotas, and learn which actions move the needle for which audiences on which services. Periodic reviews would then ratchet expectations, retire ineffective tactics, and scale what works, turning policy and measurement into a continuous improvement loop rather than a box-ticking exercise. This “learn-and-scale” approach would reduce risk, build a shared evidence base, and would avoid imposing targets that may not translate across different interfaces and catalogues.

5. Incentivize strategic marketing investment with measurable impacts and data access throughout the lifecycle.

Digital technology has handed control to audiences: virtually thousands of titles, of any type, on any subject, in any language, for any age are available on any screen, at any

time. In this environment, loyalty builds around titles, creators, and themes rather than around specific services. The old appointment-viewing reality that once concentrated audiences in time and place (typically the living room) has dissolved into individual virtual viewing on a variety of screens. People still want to see the hit, just not necessarily at the prescribed time nor in the same room with others. This shift in behaviour stretches the marketing task, requiring larger, smarter, and longer-term investment to sustain interest from early development through release and into catalogue. Currently, in Canada support for the marketing and promotion of content represents a relatively small portion of overall investment in audio and audiovisual; there is opportunity to refocus supports to maintain investment in production (essential to successful content performance) while expanding investment in marketing and promotion, starting in the development phase.

A practical policy response to current and emerging business models would see audience development as an eligible and incentivized spend class across the content lifecycle. Shifting investment focus should include clear, transparent, measurable indicators of success. Public support for content development, production and marketing should be conditioned by robust, evidence-based engagement plans from development through production, launch and catalogue phases. As broadcasters and streaming services benefit from this public investment when they licence original or catalogue shows or contract production or sales deals with producers (and/or other services), their investment should also be subject to robust, clear, transparent reporting. In consultation, both broadcasters and streamers suggested that any regulatory requirements for spending on Canadian content should include marketing and promotion expenditures – as there is little value in producing content that nobody sees.

Effectiveness of a discoverability performance framework hinges on transparency and data access. Producers are increasingly asked to bring audience proof to the table, yet once a title moves to a broadcaster or streamer, performance data is not always shared in a timely or standardized manner. While broadcasters and streamers share show-specific data with producers, some of which can help producers improve the specific show in question or prepare new materials for future shows, the broader content

production community does not have access to this data – data that could help equity-deserving communities and emerging creators and producers develop stronger concepts. A standardized set of KPIs, reported on annually could make a significant contribution to the successful development of Canadian and Indigenous content that reflects the geographic, cultural, racial, and linguistic diversity of Canada. Services could potentially satisfy this through trusted intermediaries (data trusts) that aggregate and de-identify user-level data while enabling creators to learn, iterate, and finance against proven traction.

Canada’s existing content creation funding and promotion bodies remain essential catalysts in the content creation ecosystem. Continued modernization of mandates, policies, programs, and tools to reflect current market realities and financing structures would improve the potential of Canadian content to succeed locally and internationally. Telefilm, the CMF, the NFB, Musicaction, FACTOR, the Community Radio Fund, Independent Certified Funds as well as provincial agencies, and export offices can continue to be fundamental mechanisms of Canadian creativity and discoverability.

6. Commit more resources to metadata infrastructure.

This research confirms that data – its quantity and its quality – is foundational to discoverability, promotion, and prominence. Creators and companies need data to develop competitive IP, demonstrate audience traction, and analyze title and content performance. Services need data to surface the right works to the right audiences. Metadata is the connective tissue: it preserves data quality from one link in the lifecycle to the next and provides the shared language that makes content legible to machines.

Metadata matters in terms of two key issues:

- **Findability/readability:** discoverability is a conversation with search engines as much as with audiences. Clean, consistent metadata (identifiers, origin and language, credits, genres, accessibility tags, synopsis/keywords) makes Canadian

works indexable and matchable in search and recommendation systems (including AI-driven conversational models).

- Value flows: robust rights and repertoire metadata ensure that remuneration reaches rights holders accurately, an essential point if Canada is to grow a scalable IP ecosystem in a complex, globalized chain of intermediaries.

As such, a comprehensive discoverability framework should consider:

- Investment in public metadata infrastructure at the national level. To ensure that truth and provenance remain under domestic stewardship, especially as online information increasingly transits through foreign AI systems trained on (unverified) internet-scale data; Canada needs independent, interoperable registries and services for identifiers and descriptive/enrichment data. Public infrastructure and metadata ownership will be key to preserving accuracy, cultural context, and trust in an AI-centred ecosystem.
- Clarification and confirmation of required data-hygiene expectations across the content creation lifecycle, with clear minimum metadata baselines created at ideation and enriched through the content lifecycle.
- Resources and capacity-building so every Canadian work is compliant with standards-based metadata throughout the content creation lifecycle. This would require collective national initiatives (training, shared toolkits and resources, validation services, data trusts) to complete datasets and enable safe, reliable transfer of metadata from creation to distribution to archive.

Because key distribution systems and the marketplace itself is global, these efforts should align with international standards. Federal participation in standard-setting to improve country-of-origin and creator attribution would help to ensure services can consistently recognize Canadian works across interfaces, while at the same time supporting custom metadata fields for Indigenous works and languages developed with Indigenous partners, as well as French language considerations and equity deserving communities across Canada. In short, discoverability and fair compensation depend on

the same backbone: a well-resourced, standards-driven metadata infrastructure that Canada builds, maintains, owns, and governs.

7. Build shared responsibility and collaboration.

A central lesson of this study is that the content lifecycle is not a sequence of discrete windows; it is a continuous flow. Discoverability success therefore requires an ongoing dialogue. One with audiences as they encounter, sample, and return to works; and another, equally important, among the partners who guide content through development, financing, production, marketing, distribution, and catalogue. The objective is to maximize impact at the multiple moments when audiences make choices. This objective cannot be achieved by any single actor; it depends on the accumulation of complementary expertise, perspectives, and assets across the ecosystem.

Because discoverability is a shared responsibility, it also needs shared governance. A static, one-time regulatory fix will not resolve a dynamic, multi-actor, technology and audience behaviour-driven, constantly evolving challenge. While CRTC consultations are essential to establishing a robust regulatory framework, it seems like a nationally coordinated effort would be required to bring together key public entities (CRTC; Canadian Heritage; Innovation, Science, and Economic Development; Global Affairs), national and provincial funding bodies and agencies, industry associations, Canadian companies, and foreign services operating in Canada to establish a standing forum to surface barriers, test collaborative solutions, and align policy and market practices over time.

Collaboration should be incentivized and rewarded. Policy could recognize and credit cross-promotion, resource pooling, and inter-sector initiatives that measurably improve the visibility and uptake of Canadian works. Concrete opportunities could for instance include strengthening music and audiovisual synergies. For instance, incentivizing the use of Canadian composers and the synchronization of Canadian songs in Canadian audiovisual productions to reinforce Canadian cultural objectives, to encourage Canadian

IP ownership and resulting economic opportunity, and to leverage multiple pathways to content discoverability.

In short, building shared responsibility means pairing clear expectations with practical mechanisms for partners to act together so the system consistently, effectively, and efficiently meets audiences where they are – providing access to authentic Canadian and Indigenous audio and audiovisual content that Canadian and global audience can find, choose, and champion.

8. Support capacity-building across the sector.

Discoverability is multifaceted and easy to misdiagnose from any single vantage point. A national discoverability performance framework, to be effective should consider the capacity of the entire ecosystem to address challenges and seize new opportunities. This framework could consider sector-wide literacy, especially among Canadian-content SMEs that struggle to access and retain the specialized talent and resources associated audience research, marketing and promotion required to compete – because audio and audiovisual industries operate first and foremost in the global attention economy. The objective of capacity building is practical: equip creators and producers to design, assess, and execute audience-development and discoverability strategies in collaboration with broadcasters and online services, and to embed these practices in all phases of the content lifecycle from development through catalogue.

Capacity-building could target skills and roles that move the needle: release planning, creative marketing and community management, metadata hygiene and SEO, packaging for recommenders, and performance analytics. Programs could pair training with on-the-job integration, supporting SMEs to recruit and retain community managers, metadata/SEO specialists, and data/AI practitioners so capabilities persist beyond a single title.

This skills agenda is inseparable from business acumen. As companies shift from production to commercialization, training must include pricing and rights strategy, data-informed greenlight practices, and the translation of audience evidence into financing and distribution terms. However, capacity without capital will not deliver creators and producers need development-phase resources to fund audience research, prototyping/teasers, and market tests that demonstrate how identified audiences will be reached before major spend is locked.

Capacity-development delivery should leverage Canada's existing and robust industry service organizations, focusing on industry associations to lead on-the-ground delivery in collaboration with funding agencies and post-secondary institutions. These efforts should include the establishment and/or reinforcement of bilingual centres of expertise including regional hubs and serving both English -and French-language markets with tailored support for Indigenous creators (and Indigenous language content). Emphasis should be on self-help models (e.g., shared toolkits and mentor networks) augmented by investment from the distribution systems that benefit from the opportunity to provide Canadian content to audiences in Canada and around the world.

9. Consolidate efforts with strategic national campaigns.

In Quebec's francophone market, audiences have historically celebrated, watched, and listened in large numbers to domestically created, produced, and owned content, although this habit is increasingly under pressure. By contrast, anglophone audiences have been more hesitant to champion domestically produced audiovisual works. This hesitation is specific to Canada and reflects proximity to the US market; while the US influence is global, many other countries (owing to cultural, social, geographic, and/or linguistic factors) remain more attached to domestic content. In a digital environment defined by abundant choice, a strong domestic base that actively seeks Canadian-owned and produced content is essential to sustaining additional financing and support. Igniting this demand is critical to the success of Canadian content and to fostering intentional discovery by audiences.

Canada is currently experiencing heightened geopolitical tensions with the United States. This context has prompted many Canadians to engage with and celebrate Canadian-made and -owned audiovisual and audio content as part of a broader shift toward choosing Canadian products. This unique period presents an opportunity for broad-based awareness campaigns in English- and French-language markets that highlight Canadian and Indigenous content, including equity-deserving communities, and international achievements.

Coordinated national campaigns should form part of the Canadian content discoverability framework. Whether building on the current geopolitical momentum or aligning with other timely narratives, collective initiatives can materially increase awareness of Canadian content domestically and internationally.

Beyond general promotion of Canadian content, targeted initiatives are warranted. For instance, appreciation and awareness begins with kids, families, and the K-12 education systems in each province and territory. These young audiences are the backbone of future domestic audiences and future ambassadors for Canadian content. Similarly, there is untapped potential to establish consumption habits and provide refreshed cultural reference points for newcomers by promoting both classic Canadian works and new voices across regions, communities, and languages. Opportunities also exist to increase the presence of Canadian music in public spaces, expanding the discoverability funnel beyond our screens.

As Canadian content strengthens its position globally, more coordinated action in export markets is advisable. International campaigns can draw on lessons from jurisdictions that position their content industries alongside sectors such as tourism, education, or fashion. Canada has many stories to tell, and many more to showcase and discover in person.

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