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# The Economic Value of CBC

Commissioned by CBC/Radio-Canada

October 6, 2025

# The annual economic value of CBC (English Services)

		Gross domestic product (\$M)	Labour income (\$M)	Employment (FTEs)
	CBC Operations	939	733	7,030
	Canadian independent production	473	388	5,370
	Downstream impacts on demand for broadcast distribution	156	109	1,650
	Promotion of Canadian music	109	55	800
	Enabling exports of Canadian television IP	105	86	1,230
	Advertising sector impact	25	16	220
	Connecting remote communities to news and information	21	11	160
	Press freedom and journalistic pluralism	Greater degrees of press freedom are positively associated with greater levels of economic growth, human development outcomes, education and reduced income inequality.		
	<b>Total</b>	<b>1,828</b>	<b>1,398</b>	<b>16,460</b>



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# Highlights



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# Highlights

- The CBC generates economic value through **eight distinct channels**: (i) operations spending; (ii) supporting Canadian independent television production; (iii) downstream impacts on demand for broadcast distribution; (iv) promoting Canadian music; (v) enabling exports of intellectual property (IP); (vi) connecting remote communities to news and information; (vii) protecting the Canadian advertising sector; and (viii) promoting press freedom and journalistic pluralism.
- Through its positive impact across the value chain and wider economy, CBC generates over **\$1.8 billion in gross domestic product (GDP) for the Canadian economy**, \$1.4 billion in labour income and 16,460 full-time equivalents (FTEs) of employment.
- In other words, the CBC generates \$1.72 of GDP for every dollar it invests in its operations and content (\$1,063 million in 2023/24) – an economic return on investment of 172%.
- CBC's operations (including a portion of its corporate functions and infrastructure shared with Radio-Canada) on its own directly employed 4,020 people during the 2024 Broadcasting Year ("BY2024") in 2023 and generated an estimated 7,030 FTEs of employment including the indirect and induced impacts.



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## Highlights (cont'd)

- CBC's local television and radio stations outside of Toronto employed 1,755 people in 2023 and injected over \$150 million in spending in local economies, including \$147 million in labour income.
- CBC supported \$544 million in Canadian independent television production in 2023, of which an estimated \$412 million would not have been spent in absence of CBC. This \$412 million in incremental television production spending generated 5,370 FTEs of employment and \$473 million in GDP.
- 3.5% of Canadian broadcast distribution undertakings' (BDUs') total subscriber revenue in 2023, or \$248 million, can be attributed to its carriage of the CBC English network along with CBC News Network and the Documentary Channel. This attribution share generated 1,650 FTEs of employment and \$156 million in GDP.



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## Highlights (cont'd)

- In 2024, CBC Radio broadcast over 986,000 tracks of music by Canadian artists. Its digital audio streaming service, CBC Listen, made a further 32,000 Canadian tracks available to listeners. CBC Radio aired tracks represented over 3.2 million minutes of music and provided the equivalent of over \$22 million in the value of airtime promotion. This level of promotion could have led to an additional \$104 million in revenue for Canadian record labels, along with 800 FTEs of employment, \$55 million in labour income and \$109 million in GDP for Canadian economy.
- Canadian producers and distributors' IP revenue, associated with CBC-commissioned production, generates an estimated 1,230 FTEs of employment and \$104.5 million in GDP for the Canadian economy, annually, once that IP revenue is circulated back into Canadian TV production.
- CBC's over-the-air transmission network provides rural and remote communities in Canada with affordable access to news and information. The replacement cost of this network to Canada's 97,622 rural and remote households in Anglophone communities without broadband internet is estimated to be between \$13 million and \$34 million.



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## Highlights (cont'd)

- Research of the economic benefits of long-term access to broadband internet in rural areas suggests that access to the over-the-air network itself is worth \$31 million in annual GDP for Canada, which would support 240 FTEs.
- In the absence of the CBC, an estimated \$151 million in advertising spending would be lost from the Canadian economy to non-Canadian platforms. That situation implies that ads on CBC generates \$23 million in annual fees (15% x \$151 million) for Canada's advertising sector and helps protect 220 FTEs of employment and \$25.3 million in GDP for the Canadian economy.
- CBC plays an essential role in promoting journalistic plurality and press freedom, helping to lift Canada's position on Reporter Without Borders' [Press Freedom Index](#). Better performance on the [Press Freedom Index](#) is statistically linked to positive outcomes in economic growth, human development, education and reduced income inequality.





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# Executive summary



# Executive summary

From its founding in 1936, CBC/Radio-Canada has operated as Canada's national public broadcaster, providing Canadians across the country with access to news, information and entertainment in English, French and Indigenous languages over television, radio and digital platforms.

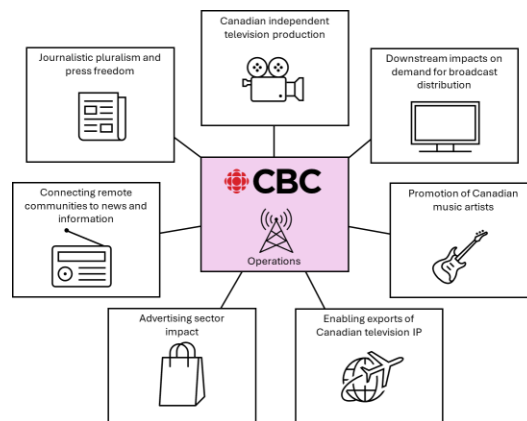
CBC/Radio-Canada's English service, CBC, is a critical player in Canada's media sector. It is a major commissioner of original content, a source of high-quality news and information, and a protector and promoter of Canadian culture and creativity. It also generates a significant contribution to the Canadian economy.

The purpose of this report is to isolate and estimate the economic value CBC's English services – both to the media value chain and the wider economy. CBC's English and French services are inextricably linked, but in this report, the CBC is treated as separate from Radio-Canada for modelling purposes. In reality, however, the two organizations are much more interconnected.

To assess the economic value of CBC, this report examines **eight distinct channels** or lenses through which the CBC generates distinct economic benefits (see diagram at right).

## Overall Economic Value

**Through its positive impact across the value chain and wider economy, CBC generates over \$1.8 billion in gross domestic product (GDP) for the Canadian economy, \$1.4 billion in labour income and 16,460 full-time equivalents (FTEs) of employment.**



## Operations impact

First and foremost, CBC's operations generated 7,030 FTEs of employment and \$939 million in GDP in 2024, including 4,020 people<sup>1</sup> employed directly at CBC itself, earning \$524 million in compensation – much of which was re-spent within the Canadian economy – and paying approximately \$100 million in income taxes.

The protection of Official Language Minority Communities (OLMCs) programming is a key objective of Canada's media policy and forms part of CBC's licence commitments. CBC's operations in Quebec are a key means by which it facilitates and promotes the production and distribution of minority English-language content. Meanwhile, its facilities outside of Quebec enable Radio-Canada to air French-language OLMC programming across Canada and produce more cost-efficiently.

## Canadian independent television production

One of the CBC's largest channels of economic impact comes from the television content that it commissions each year from independent Canadian producers. In 2023, CBC's licence fees underpinned \$544 million in total production budgets for English television programming. This production spending, in turn, generated an estimated \$388 million in GDP for the Canadian economy, along with 5,370 FTEs of employment, including 2,860 FTEs of cast and crew employment directly within the Canadian production industry.

1. Includes employees at CBC/Radio-Canada's English Services and a portion of people employed in corporate departments and shared infrastructure.



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# Executive summary (cont'd)

## **Downstream impacts on demand for broadcast distribution**

The carriage of CBC programming services – both conventional and discretionary television services – generates an estimated \$248.1 million in annual revenue for Canadian BDUs or 3.5% of their total revenue. This translates into 1,650 FTEs generated by BDUs along with \$155.6 million in GDP.

## **Promotion of Canadian music**

With an estimated value of commercial radio airtime of \$4.66 per minute, the replacement of CBC's promotion of artists' music during the peak period of 6 am to 6 pm would be an estimated \$22.4 million for Canadian artists, \$4.6 million for emerging Canadian artists, and \$3.4 million for Indigenous artists.

The estimated \$22.4 million of promotion value could have led to an additional \$103.5 million in revenue for Canadian record labels, along with 800 FTEs of employment, \$54.9 million in labour income and \$108.7 million in GDP for Canadian economy.

## **Enabling exports of Canadian television IP**

CBC's commissioned television content attracted an estimated \$349 million in export value in 2023/24 (i.e. foreign pre-sale financing). CBC's commissioning of Canadian television content also enabled Canadian independent producers to earn an estimated \$91 million in library sales in 2022/23, of which \$50 million was earned from foreign licensees. In 2023/24, library sales are estimated to have risen to \$107 million.

## **Connecting remote communities to news and information**

CBC's over-the-air transmission network is a vital means of delivering news and information to Canada's 447,000+ rural and remote households in anglophone communities (3% of all households in Canada). Out of these total households, an estimated 98,000 households do not have access to broadband internet.

Without CBC's over-the-air network, Nordicity estimates that these 98,000 households would incur a cost of at between \$13 million and \$34 million to connect to broadband internet networks in order to facilitate access to news and information.

Research of the economic benefits of long-term access to broadband interest in rural areas suggests that access to the over-the-air network itself is worth \$31 million in annual GDP for Canada, which would support 240 FTEs.

## **Advertising sector impact**

By helping to retain ad spending dollars in Canada and preventing them from migrating to non-Canadian online platforms, the CBC helps protect 220 FTEs of employment and \$25 million in GDP within the Canadian advertising sector.

## **Press freedom and journalistic pluralism**

CBC's globally recognized journalistic standards helps keep Canada ranked highly on the Reporters Without Borders [Press Freedom Index](#) (14 out of 180 in 2024), thereby supporting better economic and human development outcomes (e.g. GDP per capita, adult literacy, Human Development Index and reduced income equality) which are positively correlated with higher degrees of press freedom.



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# Introduction



# Background

From its founding in 1936, CBC/Radio-Canada has operated as Canada's national public broadcaster, providing Canadians across the country with access to news, information and entertainment in English, French and Indigenous languages over television, radio and digital services platforms.

In Canada's English-language market, CBC/Radio-Canada's public broadcasting mandate is fulfilled by its English service, which operates:

- CBC conventional television network
- CBC News Network
- Documentary Channel
- CBC Gem
- 54 local radio stations
- CBC.ca
- FAST channels and other digital apps

The CBC is a critical player in Canada's media sector. It is a major commissioner of original

content, a high-quality source of news and information, and a protector and promoter of Canadian culture and creativity.

The CBC also generates a significant contribution to the Canadian economy. First and foremost, CBC is a major employer and purchaser of supplies and services. In 2024, the CBC employed over 4,000 people and spent over \$1 billion on its operations, including expenditures on staff compensation; purchases of supplies and services; and the commissioning and acquisition of Canadian programming and other Canadian content for its television, radio and online platforms. All of which has a positive economic impact.

However, the economic value of the CBC goes well beyond the parameters of its own workforce and supply chain. Similar to public broadcasters around the world, the CBC generates wide-ranging economic value that often 'spills-over' into or 'crowds-in' other sectors of the Canadian economy.

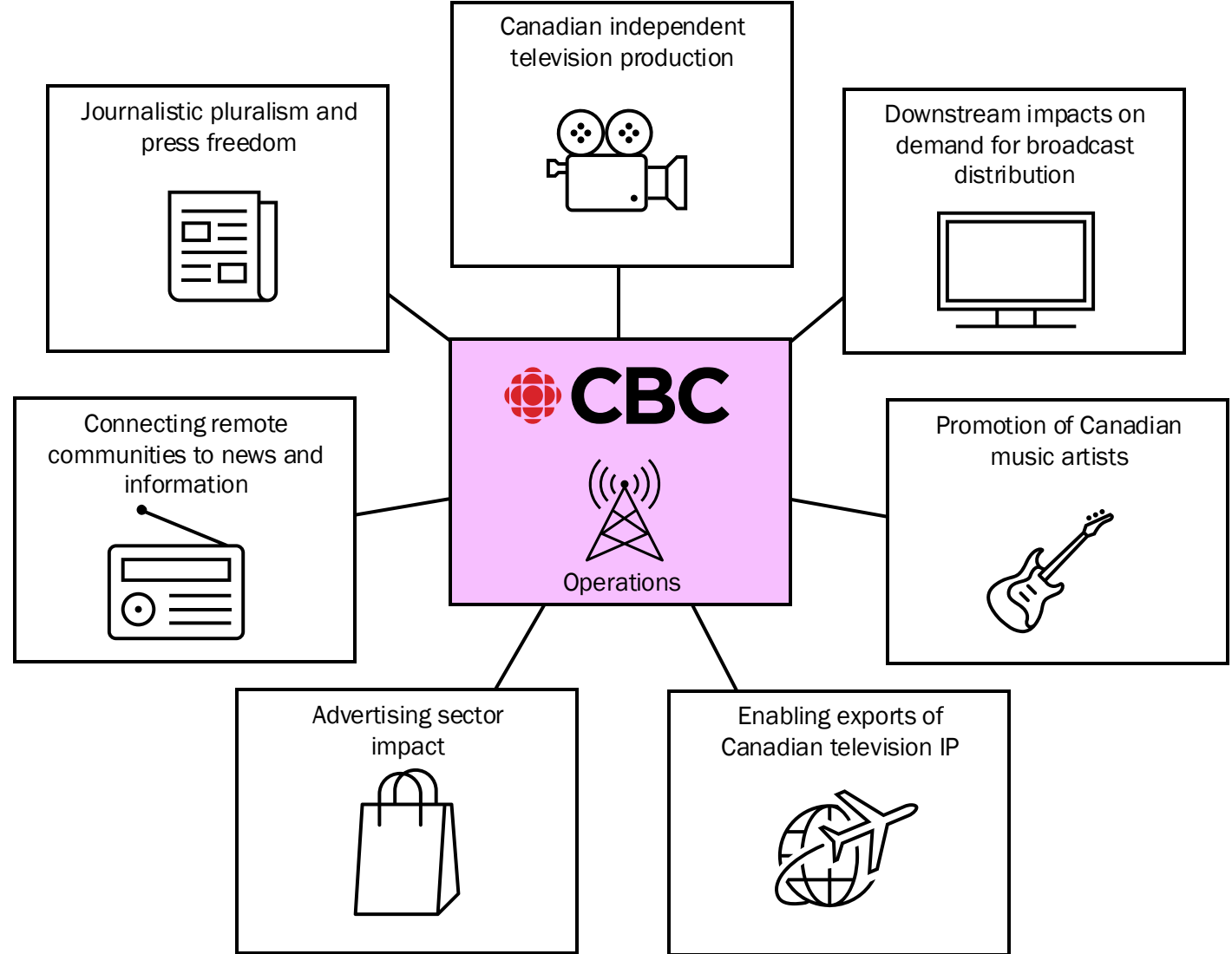
*The purpose of this report is to isolate and estimate the economic value of CBC's English services – both to the media value chain and the wider economy. CBC's English and French services are inextricably linked, but in this report, the CBC is treated as separate from Radio-Canada for modelling purposes. In reality, however, the two organizations are interconnected.*

*Any CBC and Radio-Canada parsing is done for the purpose of estimating the economic impact of CBC's English services on the value chain and is not meant to reflect the 'on-the-ground' experience of the whole organisation.*



# Channels of economic impact

The following report analyzes the CBC's wide-ranging economic contribution through **eight distinct channels**.



# Methodology

## MyEIA™ Model

Nordicity's MyEIA™ Model is its in-house model for estimating the economic impact of organizations, industries, and government programs and policies. The MyEIA™ Model is based on Statistics Canada's 2018 supply and use tables, and 2023 median wages. It provides estimates of direct, indirect and induced impacts on employment, labour income, GDP, and federal, provincial and local tax revenue.

This economic impact analysis was based on a combination of a (i) **literature review**, (ii) **secondary data collection** and (iii) **economic modelling**.

### Literature review

Nordicity reviewed several existing studies and reports analyzing the economic contribution of public broadcasters (in other countries), the Canadian television production sector, the Canadian and global advertising and media sectors, and empirical analyses of the economic benefits of journalism and media.

### Secondary data collection

This analysis was very data-intensive. Nordicity sourced financial statistics, broadcaster annual reports and other data for the Canadian broadcasting sector from the Canadian Radio-television and Telecommunications Commission (CRTC). *Profile 2024: An economic report on the media production industry in Canada*, published by the Canadian Media

Producers Association (CMPA) was another key source of data on the Canadian television production industry.

CBC/Radio-Canada also provided a variety of confidential datasets on its operations.

### Economic modelling

A variety of economic modelling approaches was applied throughout this study to estimate the employment, labour income and gross domestic product (GDP) that is generated by different aspects of CBC's economic contribution. The choice of economic model was determined by the nature of the economic impact analysis and the type of data available.

Where existing economic models or ratios were not available, Nordicity used its own in-house economic impact model, the MyEIA™ Model (see box at left), to derive estimates of direct, indirect and induced impacts on employment, labour income and GDP.



# Methodology (cont'd)

The economic impact modelling provides estimates of:

- **Employment:** The number of jobs supported or generated by an economy, industry or organization. It can be measured in terms of the individual number of jobs or full-time equivalents (FTEs). One FTE is equal to one person working full-time (i.e. 40 hours per week) for one year; two people working 20 hours per week for one year; or two people working 40 hours per week for 6 months.
- **Labour Income:** The total value of salaries, wages and other benefits paid to employees (and freelancers) working within an economy, industry or organization.
- **GDP:** The economic value of goods and services produced by an economy, industry or organization. At an industry or organization level, GDP is equal to the difference between the total value of final output and intermediate inputs (i.e. external supplies and services) used to create that final output by an industry or organization.

## Types of economic impact

- **Direct impact:** The employment, labour income and GDP generated directly within the industry or organization that is the subject of an economic impact analysis.
- **Indirect impact:** The employment, labour income and GDP generated within the supply chain of the directly impacted industry or organization. It occurs when the directly impacted industry or organization purchases supplies and other intermediate inputs.
- **Induced impact:** The employment, labour income and GDP generated when workers employed due to direct and indirect impacts re-spend their income within a local, provincial or the Canadian economy through consumer purchases.
- **Spin-off impact:** Equal to the sum of the indirect and induced impacts. Used where economic impact modelling does not provide a breakdown of indirect and induced impacts.
- **Total impact:** The sum of the direct, indirect and induced economic impacts or the sum of the direct and spin-off economic impacts.





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# Research and analysis



# Operations impact

As Canada’s national English-language public broadcaster, CBC generates benefits for the Canadian economy through its operations impact. In particular, through the staff that CBC employs and its operations expenditures, CBC generates a significant economic footprint across Canada in terms of employment, supplier purchases, and wider spending across the Canadian economy.

During the 2024 broadcasting year (“BY2024” September 1, 2023, to August 31, 2024), CBC operations expenditures totalled \$1.1 billion. Most of this spending was through the CBC’s investment and delivery of programming and production, which totalled \$754.8 million, 94% of which is Canadian content.

Out of these total programming and production expenditures, CBC’s conventional television service accounted for \$390.9 million, followed by the radio network (\$151.1 million), digital services (\$144.0 million) and its discretionary television services (\$68.9 million) – CBC News Network and the Documentary Channel.

CBC’s operations employed over 4,000 people in BY2024, including newsroom personnel who work across all three of CBC’s platforms, as well as a proportion of the total personnel in corporate departments that serve both CBC and Radio-Canada.



**CBC English Services, number of employees and operations expenditures, BY2024**

	Conventional TV	Radio	Discretionary TV services	Digital	Total
<b>Operating expenses (\$M)</b>					
Programming and production*	390.9	151.1	68.9	144.0	<b>754.8</b>
Technical	26.1	11.1	3.1	42.2	<b>82.5</b>
Sales and promotion	38.0	3.2	4.8	36.3	<b>82.3</b>
Administration and general	78.3	30.7	8.5	26.4	<b>143.9</b>
<b>Total operating expenses</b>	<b>533.2</b>	<b>196.2</b>	<b>85.3</b>	<b>248.8</b>	<b>1,063.4</b>
<b>Average number of employees</b>	–	–	–	–	<b>4,020</b>

Source: CBC

Notes: Totals may not sum due to rounding; number of employees rounded

\* Includes CBC spending on original independent production, which was removed before estimating the economic impact of CBC operations. The economic impact of CBC-commissioned original Canadian independent production is estimated separately in this study.



# Operations impact (cont'd)

Overall, CBC operations generated 7,030 FTEs of employment, \$733.0 million in labour income and \$939.4 million in GDP for the Canadian economy in 2024.

A big part of this overall impact was within CBC itself, where 4,020 people were employed during BY2024, earning \$524 million in compensation – much of which was re-spent within the Canadian economy. This also generated approximately \$100 million in federal and provincial income tax receipts.

CBC's purchases of supplies also generated an additional 1,630 FTEs of indirect impact employment across a variety of other industries in Canada, along with over \$127.8 million in labour income and \$236.9 million in GDP.

The induced economic impacts of CBC's operations generated a further 1,380 FTEs of employment, \$82.2 million in labour income and \$178.5 million in GDP across an even wider range of sectors of the Canadian economy.



**Economic impact of CBC English services, BY2024**

	Direct	Indirect	Induced	Total
Employment (FTEs)	4,020	1,630	1,380	7,030
Labour Income (\$M)	524.0	127.8	82.2	733.0
GDP (\$M)	524.0	236.9	178.5	939.4

Source: CBC, Statistics Canada and Nordicity MyEIA Model

Notes:

1. Totals may not sum due to rounding; number of employees rounded
2. Before estimating the economic impact of CBC's operations, its spending on licence fees for Canadian programming were removed from its overall spending on programming and production. The economic impact of this spending on licence fees is analyzed in more detail under in the section on the economic impact of CBC's investments in Canadian independent television production.



## The local economic benefits of CBC

Through its network of local TV and radio stations and digital operations across Canada, CBC supports local jobs and incomes. Outside of Toronto, CBC's local TV and radio stations employed 1,755 people, earning \$147.2 million in labour income. Those local stations spent a further \$6.6 million on supplies purchases, much of which would have been spent locally.



# Operations impact (cont'd)



## Official Language Minority Communities Programming

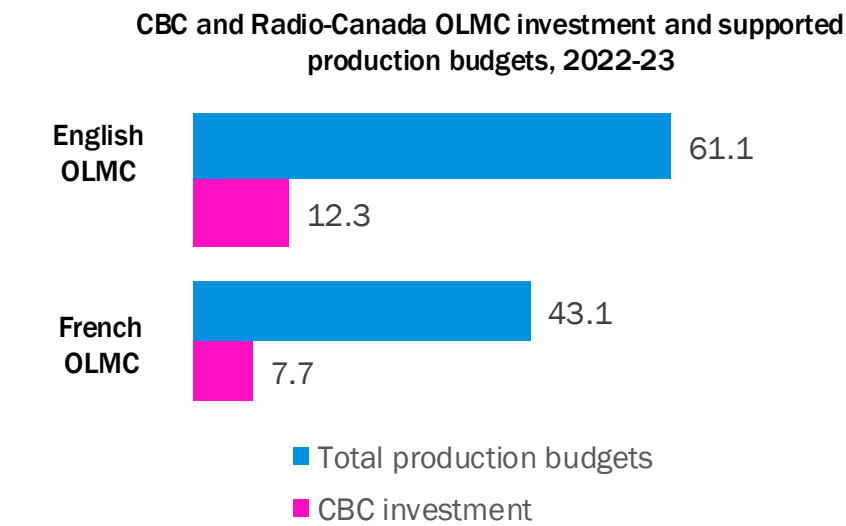
The protection of Official Language Minority Communities (OLMCs) programming is a key objective of Canada’s media policy. CBC’s operations in Quebec are a vital means by which CBC facilitates and promotes the production and distribution of minority English-language content.

By the same token, the technical co-location of French-language services at many of CBC’s facilities outside of Quebec is an important means by which CBC’s English-language operations also support minority French-language programming outside Quebec.

In 2022-23, in fulfilment of broadcasting licence requirements (Broadcasting Decision CRTC 2022-165, Appendix 3), CBC aired English-language OLMC programming for which it invested \$12.3 million, supporting a total of \$61 million in production budgets. This accounted for 31% of the estimated \$198 million in total English OLMC production in Canada that year.

CBC’s facilities outside of Quebec enabled Radio-Canada to air French-language OLMC programming in 2022-23 for which it invested \$7.7 million, supporting \$43.1 million in total production budgets. This accounted for 62% of the estimated \$69.7 million in total French OLMC production in Canada that year.

Radio-Canada’s regulatory obligations would mean that it would continue to support the

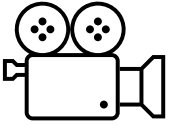


Source: Nordicity estimates based on data from CBC and QEPC

production of French OLMC content, even in the absence of CBC. However, without access to CBC facilities and equipment outside of Quebec, the cost of producing French OLMC would invariably increase. For example, a 10% efficiency loss would result in a \$4.3 million increase in annual production costs for French OLMC.



# Canadian independent television production



Beyond CBC's own operations, its largest source of economic impact comes as a result of the key role it plays in Canada's independent production sector.

Over 190 independent English-language television productions were commissioned by the CBC in 2023, with a total production volume of \$544 million. The largest share of the production volume came from CBC TV's commissions. CBC licence fees accounted for 31% of the financing, or \$171 million.

While CBC's \$171 million in licence fees supported \$544 million in production spending, some of the other sources of financing for this production would have remained in place even without CBC's involvement. In other words, not all sources of production financing for CBC English productions would be 100% elastic with CBC licence fees. For example, CMF and other public financing volume would likely be unaffected by a removal of CBC independent commissioning, the value of this financing would be redistributed to other production. (cont'd)

**Elastic financing** refers to types of financing that would increase or decrease in response to a change in the level of financing from CBC.

**Inelastic financing** includes the Canada Media Fund (CMF) and other types of financing within the Canadian production sector that are unlikely to change if the CBC changes its level of production financing.

CBC English independent TV production volume and licence fee financing, 2023  
(\$M unless indicated otherwise)

	Total budgets	CBC licence fees
CBC TV	495	156.2
Documentary Channel	0.7	0.2
CBC Gem	49	14.6
Total	544	171.0

Source: CBC Video Production Report, English Services 2023-2024

Canadian English independent production financing structure, 2023/24

	Total budgets	Share of total	Total
CBC licence fee	171	31%	100% elasticity
Federal tax credit	47	9%	100% elasticity
Provincial tax credit	93	17%	100% elasticity
Canadian distributors	64	12%	50% elasticity
Foreign	86	16%	50% elasticity
CMF	40	7%	Fixed
Other public*	17	3%	Fixed
Other private**	27	5%	100% elasticity
Total	544	100%	

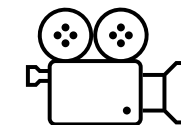
Source: CBC Video Production Report, English Services 2023-2024, CMPA Profile 2024

\*'Other public' includes financing from provincial governments, and other federal government departments and agencies; excludes federal and provincial tax credits, Canadian public broadcasters' licence fees and funding from Telefilm Canada.

\*\*'Other private' includes financing from production companies (excluding the tax credit contribution), independent production funds, broadcaster equity and other Canadian private investors.



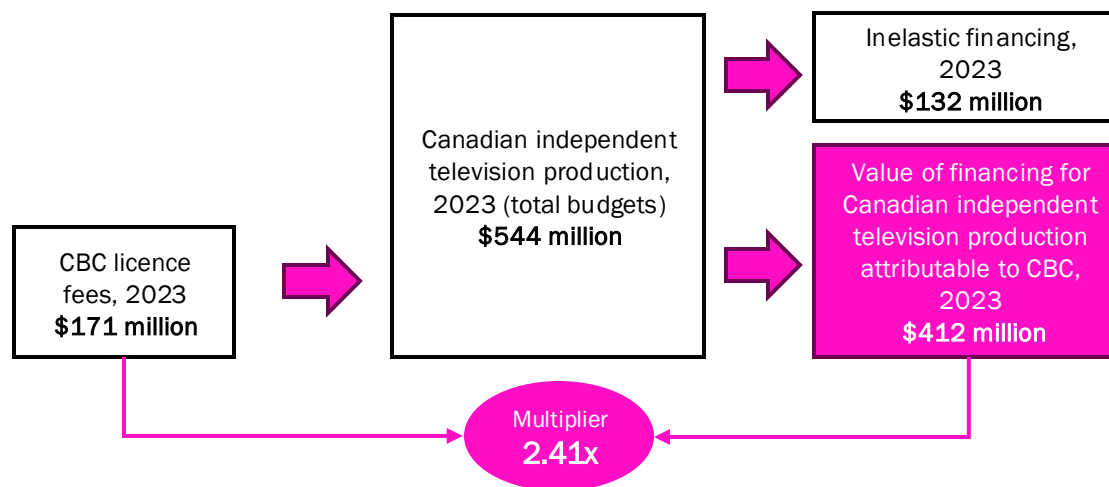
# Canadian independent television production (cont'd)



Tax credits and other private financing, however, are assumed to be 100% elastic. Canadian distributor and foreign financing is assumed to be 50% elastic. In other words, half of it would be redistributed to other Canadian independent television production. In total, therefore, CBC's licence fees support \$412 million in Canadian independent television.

After taking into account the elasticity of various sources of financing for Canadian independent television production commissioned by CBC, we estimate CBC licence fees of \$171 million help Canadian producers attract an additional \$412 million in production financing.<sup>1</sup>

The incremental television production supported by CBC (\$412 million) generates an estimated 5,370 FTEs of employment for the Canadian economy, along with \$388 million in labour income and \$473 million in GDP. Of this total impact, 2,860 FTEs of employment are generated directly within the Canadian independent production industry and a further 2,510 through spin-off impacts (i.e. indirect and induced impacts). An estimated \$236 million in labour income and \$243 million in GDP is generated directly in the independent production industry, with a further \$152 million in labour income and \$230 million in GDP through spin-off impacts.



**Economic impact of Canadian independent production supported by CBC English Services, 2023**

	Direct	Spin-off*	Total
Employment (FTEs)	2,860	2,510	5,370
Labour income (\$M)	236	152	388
GDP (\$M)	243	230	473

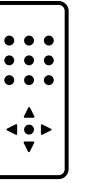
Source: Nordicity estimates based on CBC and CMPA Profile 2024

\* Equal to sum of indirect and induced impacts

Notes: Totals may not sum due to rounding; number of employees rounded

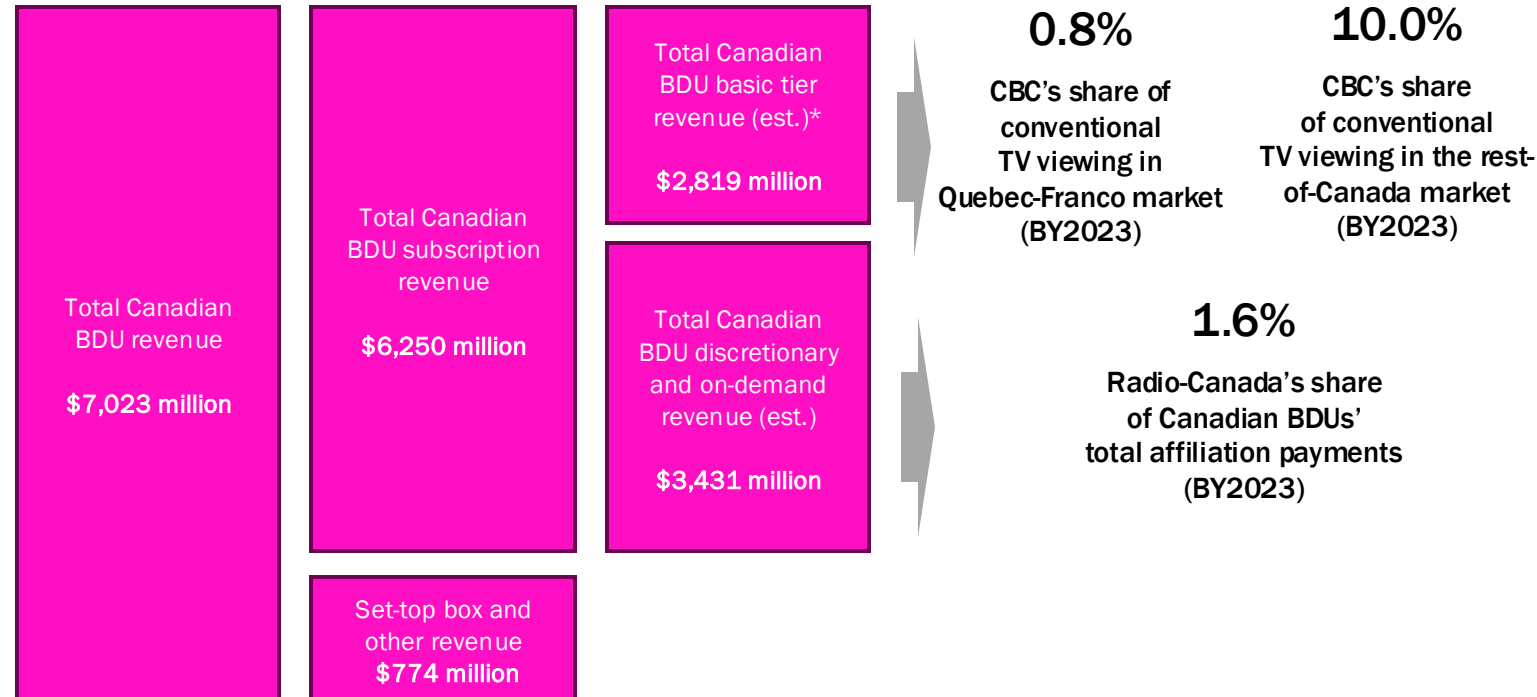


# Downstream impacts on demand for broadcast distribution



Both the CBC Main English TV Network and its English discretionary services – CBC News Network and Documentary Channel enable Canadian BDUs to offer Canadian households access to Canadian news and entertainment programming. Without these programming assets, Canadian BDUs would have much less attractive packages to offer households. This would invariably lead to further cord-shaving and even cord-cutting.

To estimate the downstream value of CBC TV services, Canadian BDU revenue (BY2023) was split into estimates of basic-tier revenue (\$2,819 million), and discretionary and on-demand service revenue (\$3,431 million). CBC's shares of viewing in the 'Quebec-Franco' and 'Rest-of-Canada' language markets were used to apportion its attributable share of BDUs' skinny-basic revenue. CBC's share of affiliation payments was used for the discretionary and on-demand market.



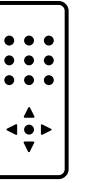
Source: Nordicity estimates based on data from CRTC, CBC and Numeris

\* 9,397,706 subscribers x \$25 x 12 months = \$2,819 million





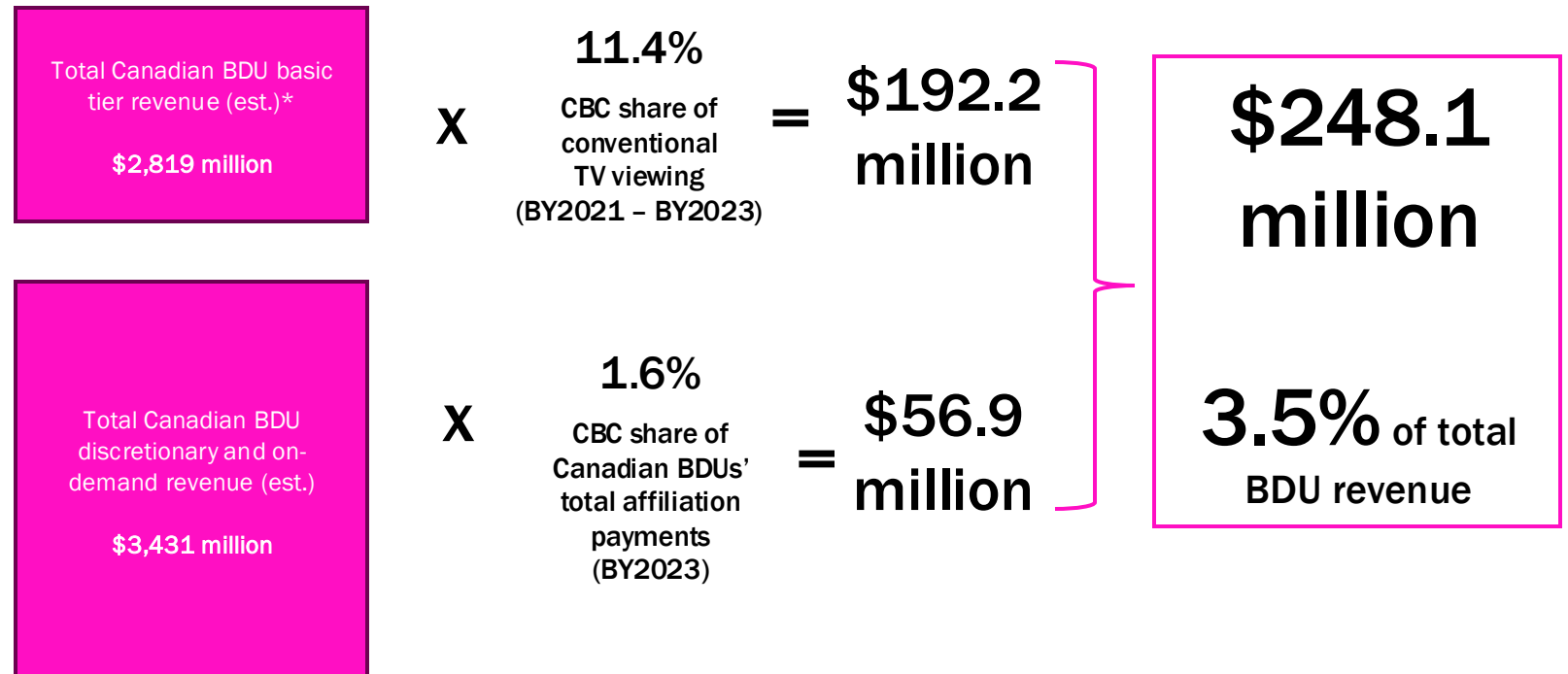
# Downstream impacts on demand for broadcast distribution (cont'd)



The CBC Main English TV Network's weighted average share of total viewing of conventional TV services in BY2023 (6.8%) was used to estimate the portion of BDU's basic tier revenue (\$2,819 million) that could be attributed to CBC (\$192.2 million).

CBC's English discretionary services' share of total Canadian BDUs' affiliation payments (1.6%) was used to estimate the portion of BDU's discretionary and on-demand revenue (\$3,431 million) that could be attributed to CBC (\$56.1 million).

Altogether, an **estimated \$248.1 million, or 3.5% of Canadian BDUs' total revenue, in BY2023** could be attributed to CBC's programming services.



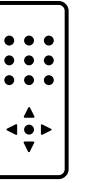
Source: Nordicity estimates based on data from CRTC, CBC and Numeris

\* 9,397,706 subscribers x \$25 x 12 months = \$2,819 million





# Downstream impacts on demand for broadcast distribution (cont'd)



CBC's 3.5% attribution share was applied to estimates of Canadian BDUs' total economic contribution in BY2023 – 46,589 FTEs, \$3.1 billion in labour income and \$4.4 billion in GDP.

Based on this approach, CBC accounts for an estimated 1,650 FTEs of employment generated by BDUs, along with \$109.3 million in labour income and \$155.6 million in GDP.

This includes 880 FTEs of employment directly at BDUs, earning \$72.8 million in labour income and generating \$90.1 million of GDP directly within the Canadian BDU industry.

Economic value of CBC downstream impact on Canadian BDU industry, BY2023

	Direct	Spin-off*	Total
<b>Canadian BDUs total</b>			
Revenue (\$M)	7,024	--	--
Employment (FTEs)	24,908	21,681	<b>46,589</b>
Labour income (\$M)	2,061	1,033	<b>3,094</b>
GDP (\$M)	2,552	1,853	<b>4,405</b>
<b>CBC attributable impact</b>			
Revenue (\$M)	248.1	--	--
Employment (FTEs)	880	770	<b>1,650</b>
Labour income (\$M)	72.8	36.5	<b>109.3</b>
GDP (\$M)	90.1	65.4	<b>155.6</b>

Source: Nordicity estimates based on from CBC, CRTC, Numeris and CMPA Profile 2024

\* Equal to sum of indirect and induced impacts

Notes: Totals may not sum due to rounding; number of employees rounded



# Promotion of Canadian artists and music



CBC’s radio platform plays an integral role in promoting Canadian music and giving emerging Canadian musical artists an opportunity to reach and build their own audiences.

In particular, CBC often showcases Canadian artists who may have been overlooked by the industry. Indeed, CBC has a number of regulatory and licence obligations in this area.

CBC also promotes Indigenous artists and music. For example, the weekly music program, *Reclaimed*, explores contemporary Indigenous music. Each year, on National Day for Truth and Reconciliation, CBC devotes its entire schedule to Indigenous music and programming.

CBC’s digital music service, CBC Music, offers over 200 music streams, giving Canadian emerging artists an unmatched platform for discovery.

Without CBC, Canada’s music industry would have to rely on commercial platforms to promote their artists and build audiences.

The current financial performance of Canada’s commercial English radio industry suggests that programming airtime (i.e. music/talk airtime) has **an average value of approximately \$4.66 per minute or \$280 per hour.**

While many Canadian musicians would be unlikely to find airtime on commercial radio, estimating the market value of airtime can help place

an economic value on the airtime that CBC provides to Canadian artists.

Estimated value of music/talk airtime on English commercial radio in Canada, 2024

	Amount
Total ad revenue (\$)	824,462,403
Number of stations	598
Average revenue per station (\$)	1,378,700
Broadcast day (hours)	18
Broadcast hours annual	6,570
Ad revenue per hour (\$)	210
Ad minutes per hour	15
Music/Talk minutes per hour	45
Ad revenue per music/talk minute (\$)	4.66
Ad revenue per music/talk hour (\$)	279.80

Source: Nordicity estimates based on data from CRTC



# Promotion of Canadian artists and music (cont'd)



In 2024, CBC Radio aired over 986,000 tracks of music by Canadian artists, CBC’s digital audio streaming service, CBC Listen, made a further 32,000 Canadian tracks available to listeners.

CBC Radio aired over 3.2 million minutes of music by Canadian artists. As part of that, it aired 654,550 minutes of music by emerging Canadian artists and 491,075 minutes of music by Indigenous artists.

With an estimated value of commercial radio airtime of \$4.66 per minute, the equivalent contribution in exposure of CBC’s promotion of artists’ music would be:

- \$15 million for Canadian artists
- \$3.1 million for emerging Canadian artists
- \$2.3 million for Indigenous artists

In other words, the music industry would have to pay these amounts to acquire airtime for their artists’ work to replicate the awareness and promotion provided by the CBC Radio platform.

As this reflects music aired across the whole broadcast day, the desire to concentrate music airtime during the peak period of 6 am to 6 pm would mean that these replacement costs would, in fact, likely be 50% higher.

- \$22.4 million for Canadian artists
- \$4.6 million for emerging Canadian artists
- \$3.4 million for Indigenous artists

This valuation only considers the cost to replace the promotion value of CBC airtime, it does not attempt to estimate the much larger

Economic value generated when Canadian artists achieved global success.

Indeed, CBC plays a key part in growing the careers of some of the Canada’s best-known artists well before they ever find global fame.

Replacement value of CBC Radio English music promotion, 2024

	Canadian artists	Emerging Canadian artists	Indigenous artists
Musical programming (minutes)	3,206,450	654,550	491,075
Value of commercial airtime per minute (\$)	4.66	4.66	4.66
Equivalent exposure cost of CBC promotion (\$) – all day	14,952,584	3,052,352	2,290,022
Equivalent exposure cost of CBC promotion (\$) – peak radio listening period	22,428,877	4,578,528	3,435,033

Source: Nordicity estimates derived from CBC Music Reports 2023/2024 and data from CRTC and The Washington Post



# Promotion of Canadian artists and music (cont'd)



Data from the UK music industry (2021) indicates that music labels earned approximately £1.00 in revenue for every 11p spent on marketing and promotion, including advertising, digital marketing, publicity, and radio and playlist promotion.

If the same financial relationship was applied to the Canadian music industry, even if the promotional spend was half as efficient as in the UK, the value of musical artist exposure on the CBC could be expected to generate \$15.9 million to \$103.5 million in additional record revenue.

In Canada, an additional \$103.5 million in record label revenue translates in 800 FTEs of employment, \$54.9 million in labour income and \$108.7 million in GDP for the Canadian economy. This includes 250 FTEs, \$18 million in labour and \$36.9 million in GDP directly within the Canadian music industry.

Economic impact of replacement value of CBC Radio English music promotion, 2024

	Canadian artists	Emerging Canadian artists	Indigenous artists
Equivalent exposure cost of CBC promotion (\$M)	22.4	4.6	3.4
Implied record label revenue (\$M) <sup>1</sup>	103.5	21.1	15.9
<b>Employment (FTEs)</b>			
Direct	250	50	40
Indirect	350	70	50
Induced	200	40	30
<b>Total</b>	<b>800</b>	<b>160</b>	<b>120</b>
<b>Labour income (\$M)</b>			
Direct	18.0	3.7	2.7
Indirect	25.3	5.2	3.9
Induced	11.7	2.4	1.8
<b>Total</b>	<b>54.9</b>	<b>11.2</b>	<b>8.4</b>
<b>GDP (\$M)</b>			
Direct	36.9	7.5	5.6
Indirect	46.5	9.5	7.1
Induced	25.3	5.2	3.9
<b>Total</b>	<b>108.7</b>	<b>22.2</b>	<b>16.6</b>

Source: Nordicity estimates derived from CBC Music Reports 2023/2024 and data from CRTC, The Washington Post and BPI (UK)

1. BPI statistics indicate that record labels in the UK earn an average of \$1.00 in revenue for every \$0.11 cents spent on marketing and promotion. This analysis assumes that Canadian record labels marketing and promotion spend is half as efficient (i.e. \$1.00 earned for every \$0.22).



# Enabling exports of Canadian television IP

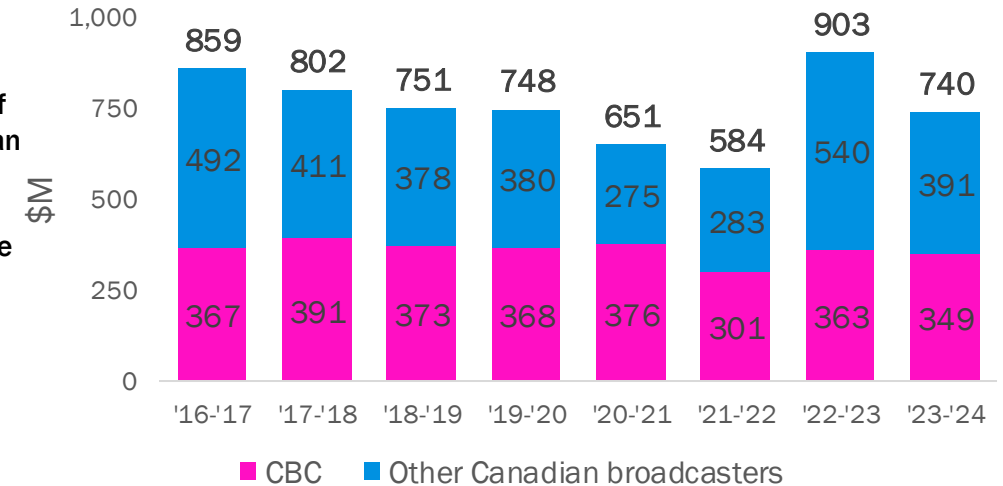


CBC's broadcast licence fees not only trigger wider investment in Canadian content production; they also enable Canadian producers to attract foreign pre-sales financing into the Canadian production system. This is akin to an export of Canadian content.

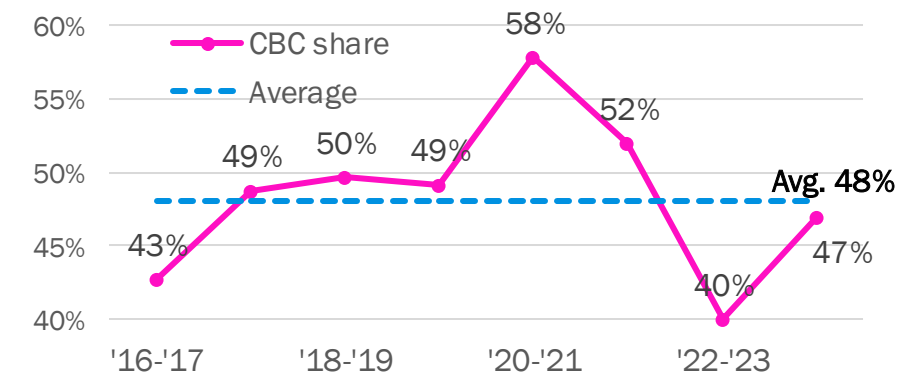
In the longer-term, the television programs made with financing from the CBC help Canadian independent producers build up their content libraries and realize foreign sales of their IP. These foreign sales – or more accurately, licensing to foreign broadcasters and distributors beyond pre-sale financing – are also counted as exports for the Canadian economy.

Nordicity's own analyses of foreign pre-sale financing of Canadian TV production and secondary sales of Canadian TV programming, by genre indicate that the CBC-licensed content generated an estimated \$349 million in 2023-24, or 47% of the estimated total of \$740 million in export value generated by Canadian English TV content produced in that year.

Export value\* of English Canadian TV production, by Canadian broadcaster type



CBC share of export value\* of English Canadian TV production



Source: Nordicity estimates based on data from CMPA Profile, CAVCO and CRTC  
\* Sum of pre-sale financing from foreign broadcasters and distributors, and Canadian distributors



# Enabling exports of Canadian television IP (cont'd)



In addition to the pre-sale export financing, CBC’s commissioning activity enables Canadian independent producers to build up a library of content and intellectual property (IP) that they can license for secondary sales to broadcasters and distributors after first window airing.

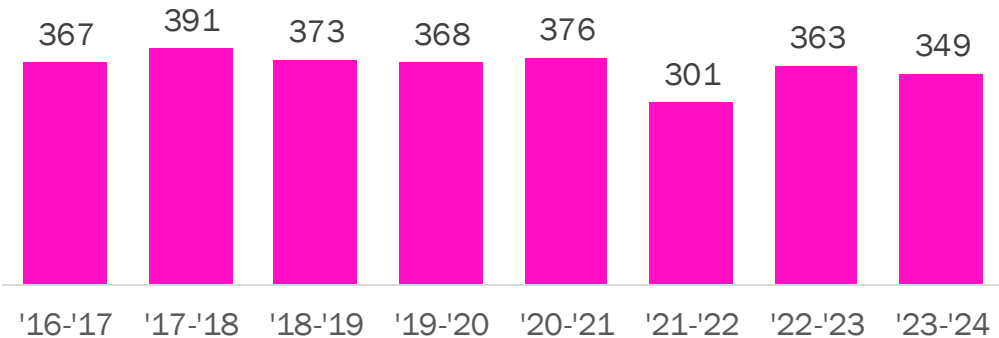
Data published by Statistics Canada indicates that the library sales of Canadian TV content were approximately \$230 million in 2023, with sales to broadcasters and distributors outside of Canada accounting for \$126 million, or 55% of total sales.

Based on these statistics for overall size of the market for Canadian TV content secondary sales, we estimate that CBC enabled Canadian independent producers to earn an estimated \$107 million in library sales revenue in 2023-24. In 2022-23, CBC enabled Canadian independent TV producers to earn \$91 million in secondary sales, of which \$50 million was earned from foreign licensees.

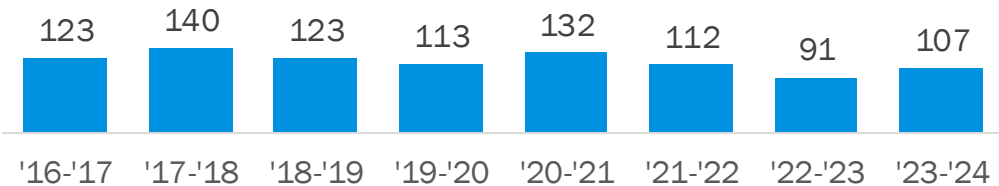
Source: Nordicity estimates based on data from CMPA Profile, CAVCO and CRTC  
\* Sum of pre-sale financing from foreign broadcasters and distributors, and Canadian distributors

English Canadian TV production commissioned by CBC...

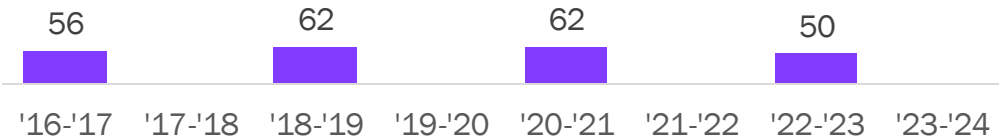
a. Export value\* (\$M)



b. Total secondary sales (\$M)



c. Export secondary sales (\$M)



# Enabling exports of Canadian television IP (cont'd)



When the IP revenue earned by Canadian distributors and producers is recycled into the production of Canadian television content, it generates additional jobs and GDP beyond the economic benefits of CBC-commissioned independent production.

**Export revenue** generated 680 FTEs or employment, \$47.1 million in labour income and \$52.1 million in GDP in 2022-23. **Domestic content revenue** generated 550 FTEs of employment, \$38.6 million in labour income and \$52.4 million in GDP in 2022-23.

In total, the IP revenue associated with CBC-commissioned production generated an estimated 1,230 FTEs of employment, \$85.6 million in labour income and \$104.5 million in GDP for the Canadian economy – once Canadian distributors and producers recycled this revenue back into Canadian TV production.

Economic impact of Canadian producers' IP revenue associated with CBC-commissioned content, 2022-23

	Direct	Spin-off*	Total
<b>Export sales</b>			
Employment (FTEs)	360	320	680
Labour income (\$M)	28.6	18.4	47.1
GDP (\$M)	24.2	27.9	52.1
<b>Domestic sales</b>			
Employment (FTEs)	290	260	550
Labour income (\$M)	23.5	15.1	38.6
GDP (\$M)	29.5	22.9	52.4
<b>Total</b>			
Employment (FTEs)	650	580	1,230
Labour income (\$M)	52.1	33.6	85.6
GDP (\$M)	53.7	50.9	104.5

Source: Nordicity estimates based on data from CBC, Statistics Canada and CMPA Profile 2024

\* Equal to sum of indirect and induced impacts

Notes: Totals may not sum due to rounding; number of employees rounded





# Connecting remote communities to news and information



**Radio is a key source of news and information and plays a vital role in emergency and public service communications in rural and remote communities**

**Radio as a key source of information and news:** Empirical research confirms that people in remote areas listen to over-the-air radio at very high rates and spent much more time tuned in than average. Radio is a preferred source of local news in remote regions.

**Radio is identified as an important source of information in emergency situations.**<sup>1</sup> When modern digital networks fail or when urgent alerts must reach the whole population, radio is often the only reliable channel available.

The same is true for CBC's radio service. **CBC's over-the-air radio service plays a critical role in emergency broadcasting and public safety**

**communication in remote areas.** This was evident during recent northern crises. During a 2024 fiber network outage that knocked out phones and internet across the Yukon and Northwest Territories, authorities relied on CBC and local radio stations to broadcast emergency updates and instructions to the public.<sup>2</sup>

1. "Radio in the bush; A study of radio listening in remote Western Australia", ACMA, <https://shorturl.at/VIUBp>

2. Liny Lamberink, "The North's telecoms system is too vulnerable, some say after last week's outage", May 17, 2024, <https://www.cbc.ca/news/canada/north/north-telecom-system-vulnerable-1.7205479>





# Connecting remote communities to news and information (cont'd)



**Over-the-air radio services provide value beyond news, information and emergency broadcasts.**

Beyond emergency alerts, **radio stations support routine public service communications** – from broadcasting public-health advisories (boil-water orders, pandemic information) to promoting community initiatives. During COVID-19, communities in Nunavut had limited access to the internet but were widely connected through territorial and local radio programming. Radio provided access to territory-wide news shows and updates from the Chief Public Health Officer.<sup>3</sup>

**Capacity-building:** Radio stations offer mentoring and training opportunities for youth. CBC radio services reaching Indigenous communities and associated programs, for example, help build skills in radio broadcasting and journalism.<sup>4</sup>

**Culture preservation and social engagement:** Radio continues to be a key communication tool and an inclusive platform for language promotion in remote Indigenous communities. A 2019 study noted that radio station and services that reach remote Indigenous communities play a critical role in those communities' preservation of culture and language, and help to maintain close community engagement (e.g. song requests, call-ins, local announcements), which listeners greatly appreciate.<sup>5</sup>

3. A cross-sectional study exploring community perspectives on the impacts of COVID-19 in Nunavut and recommendations for a Holistic Inuit Qaujimajatuqangit approach to emergency response, <https://www.tandfonline.com/doi/full/10.1080/22423982.2024.2336680#:~:text=Communities%20in%20Nunavut%20have%20limited,Radio%20provided%20access%20to>

4. Spoken from the Heart, Indigenous Radio in Canada, <https://en.cc.unesco.ca/-/media/Files/Unesco/Resources/2019/08/SpokenFromTheHeartIndigenousRadioInCanada.pdf>

5. Ibid



# Connecting remote communities to news and information (cont'd)



Rural and remote communities in Canada rely on CBC's over-the-air radio network to provide news and information. While quantifying this value is empirically challenging, the value to the listener and rural and remote residents lies in their reliance, and therefore what the cost may be to replace this source of connectivity.

In the absence of over-the-air radio, connection to the internet becomes the most viable source of information. Fixed wireless access (FWA) broadband is a popular form of internet connectivity in rural and remote regions of Canada. However, the geographic remoteness and lack of existing infrastructure make establishing these networks problematic and

this cost is passed onto the household. Plus, download speeds and internet stability are typically lower in rural areas.

Low Earth Orbit (LEO) satellite internet connections have emerged as a viable alternative to FWA in rural and remote areas and are increasingly occupying a larger market share in Canada over recent years,<sup>1</sup> but are usually controlled and operated by foreign entities.

Research shows that one of the market leaders, Starlink, offers a more consistent connection and faster speeds in rural than urban areas.<sup>2</sup> However, both over-the-air radio

alternatives represent a significant cost to households, particularly satellite internet due to the substantial installation costs.

**CBC's over-the-air network provides broadcast signals to 447,807 rural households in anglophone communities, of which an estimated 97,622 do not have access to broadband internet services (50 Mbps download / 10 MBps upload). Nordicity estimates that the cost of replacing the access to news and information provided by CBC to those 97,622 rural households could be between \$13 million and \$34 million on a one-off basis, including installation costs.<sup>3</sup>**

1. Canadian Telecommunications Market Report, CTRC, 2025

2. Fixed Wireless and Satellite broadband are closing the digital divide in Canada, Open Signal, 2025

3. Nordicity estimates based on CNET, CTRC and ISED





# Connecting remote communities to news and information (cont'd)

The annual cost of replacing the access to English-language news and information provided by CBC over-the-air radio in rural and remote regions on a one-off basis ranges from \$13 million to \$22 million depending on the speed of FWA internet, and \$34 million for a Standard Starlink package. Starlink costs reduce after year one as the installation cost is a one-off payment.<sup>1</sup>

## Modelling the cost of alternative internet connectivity in rural and remote regions of Canada

Rural households on CBC's over-the-air network, but without access to broadband Internet (21.8%)	97,622
News/Talk and CBC Radio One share of total radio tuning <sup>2</sup>	24%

FWA speed (Mbps)	3 - 9	10 - 15	16 - 40
Average monthly cost, Far North Canada (\$)	47.97	65.3	79.97
Annual cost (\$)	575.64	783.6	959.64
<b>Total annual cost (news and information only) (\$)</b>	<b>13,486,832</b>	<b>18,359,186</b>	<b>22,483,676</b>
Starlink standard package	Standard 25 - 100 Mbps		
Monthly cost (\$)	120		
Annual cost (\$)	1,440		
One-off installation cost (\$)	349		
<b>Total annual cost (news and information programming only) (\$)</b>	<b>33,738,516</b>		

1. All of these costs have been adjusted to account for the share of traffic likely to be related to news and information programming. The combined tuning share of commercial radio news/talk programming and CBC Radio One (24%) has been used to derive this adjustment. News makes up 22% of the total on its own.
2. CRTC, Communications Monitoring Report, 2019, Figure 5.7. Tuningshare, 2018: CBC Radio One, 19%; News/Talk, 9%.



# Connecting remote communities to news and information (cont'd)



Research by BC Stats of the productivity benefits associated with the extension of broadband Internet access to rural regions of British Columbia was used to estimate the value of connectivity to news and information.

According to BC Stats' analysis, over the long term the extension of broadband internet to 73,000 rural households in BC would generate \$2.3 billion in GDP benefits over a 24-year period, or \$95.8 million on an annualized basis.<sup>1</sup>

Across the 145,000 households that benefit from over-the-air connectivity, this translates into an annual benefit of \$190.3 million in GDP.

Separate research indicates that Canadian households spent an average of 365 minutes per day on the internet in 2024 and 59 minutes per day listening to the radio.<sup>2</sup> The ratio of radio listening to internet use (16%) was applied to the annual benefit (\$190.3 million) to estimate the

annual economic benefit of \$30.8 million in GDP associated with radio listening.

Statistics Canada economic multipliers were used to derive the direct, indirect and induced economic impacts for GDP, labour income and employment implied by this total GDP benefit of \$30.8 million.

**Based on this approach the economic benefits associated with connectivity to radio programming are estimated at 160 FTEs of employment, \$10.9 million in labour income and \$20.7 million in GDP.**

1. BC Stats. 2024. [Rural BC Connectivity Benefits Study](#). Prepared for Ministry of Citizen's Services. June. .p. 17-19.
2. Statista 2024. [Internet Usage in Canada](#). P. 18.

**Estimated economic benefits of over-the-air radio transmission for rural households in Canada**

	Amount
<b>Employment (FTEs)</b>	
Direct	80
Indirect	50
Induced	30
<b>Total</b>	<b>160</b>
<b>Labour Income (\$M)</b>	
Direct	5.8
Indirect	3.2
Induced	1.8
<b>Total</b>	<b>10.9</b>
<b>GDP (\$M)</b>	
Direct	10.6
Indirect	5.6
Induced	4.5
<b>Total</b>	<b>20.7</b>

Source: Nordicity estimates based on data from CBC, CRTC, BC Stats and Statista



# Advertising sector impact

CBC's level of sales of television and online advertising means that it is an important player in Canada's media advertising market.

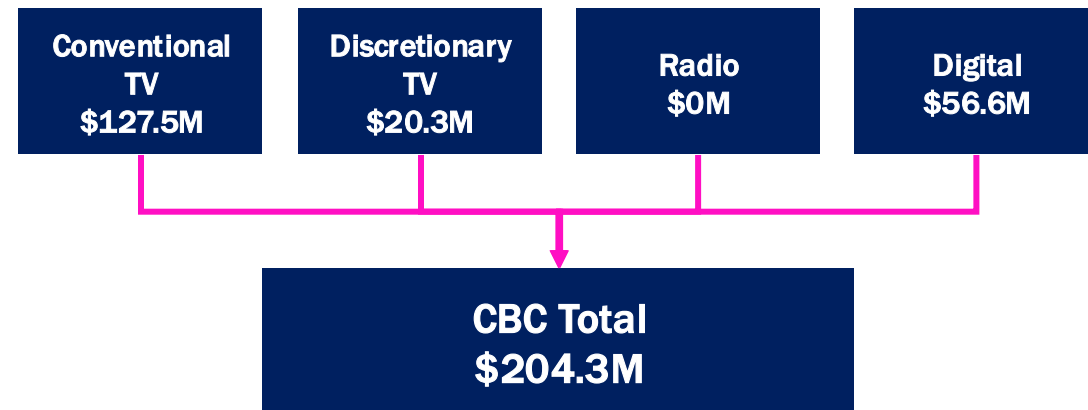
In 2023, CBC earned a total of \$204.3 million in revenue from the sale of advertising, including:

- \$127.5 million from conventional TV service ads
- \$20.3 million from ads on its discretionary TV services (CBC News Network and Documentary Channel)
- \$56.5 million from digital services

The [\*Case for Advertising on CBC/Radio-Canada\*](#), published in 2024 showed how the advertising slots offered by CBC directly help to prevent the leakage of ad spending to non-Canadian online platforms such as Facebook, YouTube and other social media platforms. This role in 'onshoring' Canadian ad spending keeps that ad spending circulating throughout the Canadian economy, generating wider economic benefits.



CBC English services advertising revenue, FY 2023



Source: CBC



# Advertising impact (cont'd)



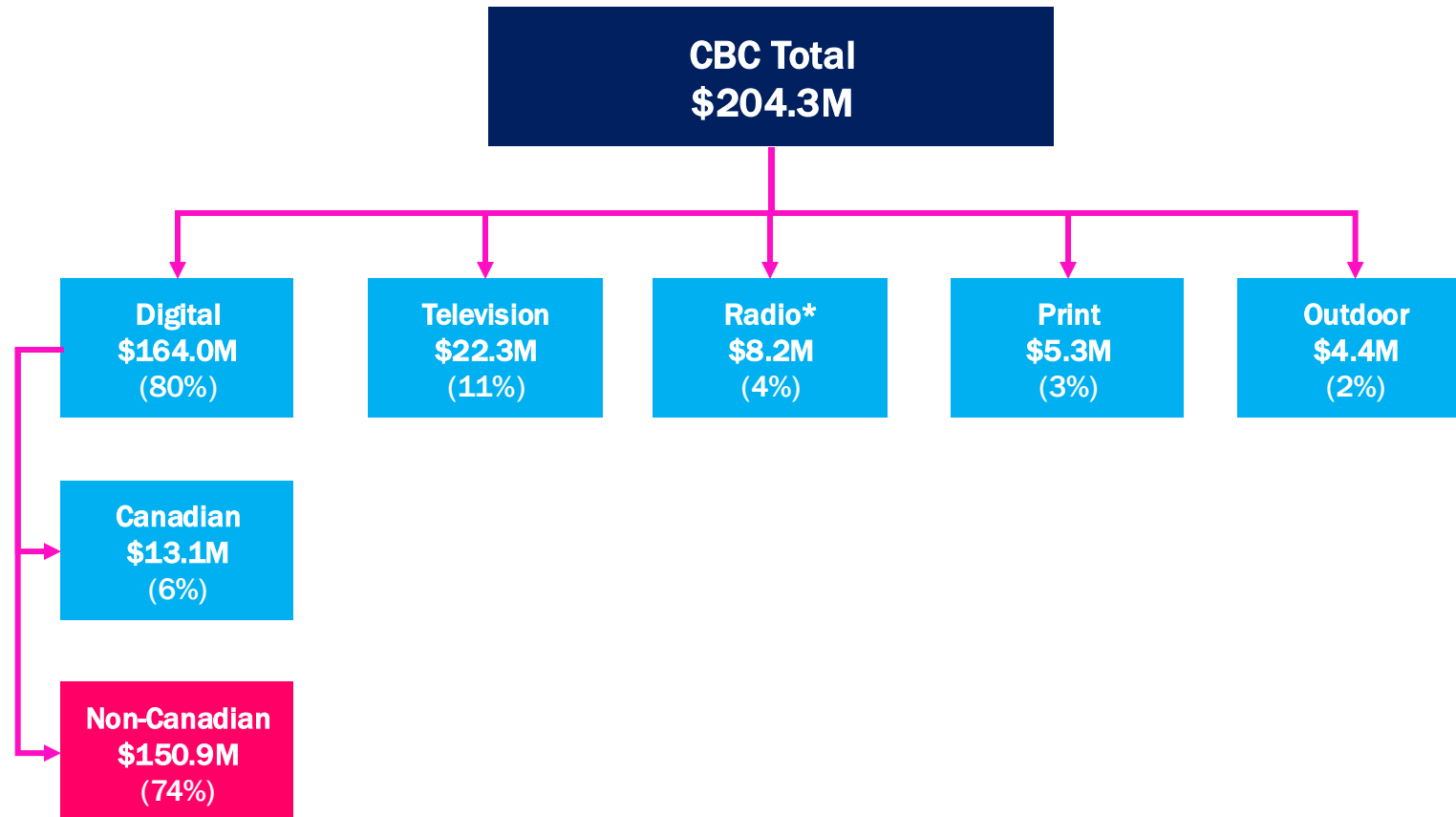
To assess the economic benefits of advertising on CBC, in [The Case for Advertising on CBC/Radio-Canada](#), Nordicity analyzed the counterfactual scenario under which CBC no longer sold ad airtime and this ad spending was redistributed across other ad media.

This counterfactual analysis indicated that 80% of ad spending currently directed towards CBC's TV and digital platforms would be redirected to other digital platforms, rather than simply migrating to private Canadian broadcasters.

Since non-Canadian platforms hold a 92% share of Canada's Internet advertising market, an estimated \$150.9 million, or 74% of CBC's total ad revenue would actually be redistributed to non-Canadian web sites and digital services, including search and social media.

This \$150.9 million would be lost from the Canadian economy, resulting in lost jobs, labour income and GDP within Canada's advertising sector – above and beyond the losses that would occur in the Canadian broadcasting and production sectors.

Summary of counterfactual analysis of redistributed ad spending from CBC, FY 2023



Source: Nordicity estimates based on data from CBC/Radio-Canada, CRTC and IAB Canada.

Note: See The Case for Advertising on CBC/Radio-Canada for additional detail

\* CBC Radio does not carry advertising



# Advertising sector impact (cont'd)



As ad revenue is redirected away from CBC, it cannot entirely be absorbed by private TV broadcasters and other Canadian media platforms. As a result, ad spending invariably will flow to non-Canadian platforms, particularly global search and social media platforms.

With eliminated ad inventory in CBC, brands will, among other things, lose a key channel for reaching minority language demographics in Canada.

Furthermore, with ad spending being redirected from CBC and the Canadian economy, the Canadian advertising sector itself stands to lose its fees and commissions on ad placement (i.e. gross margin) on the \$150.9 million in ad spending that leaves Canada. Assuming a 15% gross margin implies that CBC ads generate up to \$23 million in annual fees for Canada’s advertising sector.

These \$23 million in annual fees within Canada’s advertising sector generate 220 FTEs of employment, \$16.3 million in labour income and \$25.3 million in GDP within the Canadian economy. This includes 100 FTEs of employment, \$8.7 million in labour income and \$11.9 million in GDP directly within the Canadian advertising sector, with the balance within the sector’s supply chain.

Economic impact of CBC on Canadian advertising from sector, FY2023

	Amount
<b>Employment (FTEs)</b>	
Direct	100
Indirect	80
Induced	40
<b>Total</b>	<b>220</b>
<b>Labour Income (\$M)</b>	
Direct	8.7
Indirect	5.3
Induced	2.3
<b>Total</b>	<b>16.3</b>
<b>GDP (\$M)</b>	
Direct	11.9
Indirect	8.3
Induced	5.1
<b>Total</b>	<b>25.3</b>

Source: Nordicity estimates based on data from CBC, CRTC, IAB Canada and Statistics Canada.  
Notes: Totals may not sum due to rounding; number of employees rounded



# Press freedom and journalistic pluralism



In 2024 Canada ranked 14 of 180 countries with a global Press Freedom Index score of 81.7<sup>1</sup>

CBC/Radio-Canada plays an essential role in promoting journalistic plurality and press freedom. It operates the largest English-language news organization in Canada, representing approximately 30% of journalists in Canada.

It employs over 2,000 people in its newsrooms across the country providing independent local, national, and international news coverage on radio, television, and the web. CBC also operates a 24/7 television news channel.

CBC is a primary source for local, regional and national news in smaller communities that may otherwise not have local private, or community news outlets. Indeed, CBC's news service has been suggested as a viable option to address local news deprivation in Canada.<sup>2</sup>

CBC is recognized as the largest radio and television news broadcaster in Canada in the [Reporters Without Borders World Press Freedom Index](#), and thereby CBC contributes to Canada's consistent high-ranking for press freedom (within the top 25 of 180 countries for the past ten years). In comparison, the USA only ranked 55<sup>th</sup> in 2024.

**Reporters Without Borders** is an international non-profit organization governed by principles of democratic governance. Its mission is to act for the freedom, pluralism and independence of journalism and defend those who embody these ideals.

1. [Reporters without Borders World Press Freedom Index Canada | RSF](#)

2. [News Deprivation, Canadian communities starving for local news](#), Macdonald and Macdonald, 2025





# Press freedom and journalistic pluralism



Press freedom is associated with greater economic growth, foreign investment and reduced corruption.

Press freedom and journalistic pluralism are closely linked to positive economic and development outcomes. A free and diverse media landscape ensures transparency, holds governments accountable and constrains business corruption.

A growing body of literature finds that a deterioration of press freedom is detrimental to a nation's economy, especially where there has been a history of censorship over the long term.<sup>1</sup>

Research has shown strong statistical correlation between positive economic performance and press freedom, Wake et al. (2021), found that countries that recorded a decrease in press freedom experienced a 1%-2% drop in their GDP growth.<sup>2</sup>

Research also shows countries with greater levels of press freedom have significantly fewer incidences of bribery and corruption.<sup>3</sup> This highlights the role of press freedom in constraining corruption and therefore fostering environments that are conducive to trade and business. Indeed, Canada's 14<sup>th</sup> place ranking in 2024 compares favourably to the US, which was ranked 55<sup>th</sup> in 2024.

Press freedom has also been found to have a positive and significant bidirectional impact on economic growth and foreign direct investment. Alam and Shah (2013), found that press freedom plays a vital role in the development of the economy and that when an economically growing country implements additional press freedom, it stimulates increased inbound foreign investment.<sup>4</sup>

1. [Nguyen, J., Valadkhani, A., Nguyen, A., & Wake, A. Press Freedom and the Global Economy: The Cost of Slipping Backwards. \*Journalism Studies\*, 22\(4\), 399–417, 2021.](#)

2. [Wake et al., The Economic Costs of Curbing Press Freedom. \*The Conversation\*, 2021.](#)

3. [Binhadab, N., Breen, M., Gillanders, R. Press freedom and corruption in business-state interactions. \*Economic Systems\*, Volume 45, Issue 4, 2021.](#)

4. [Alam, Abdullah & Shah, Syed, The Role of Press Freedom in Economic Development: A Global Perspective. \*Journal of Media Economics\*, 2013.](#)



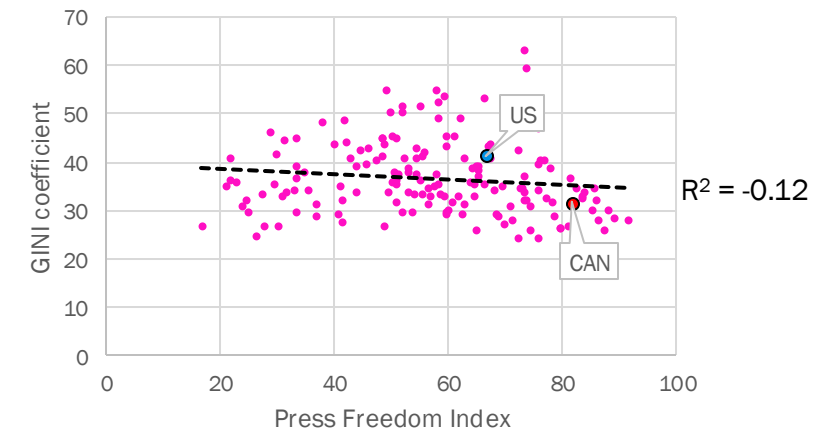
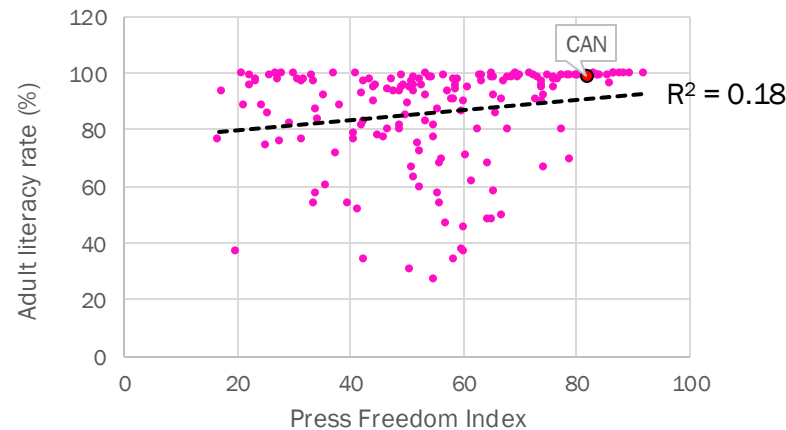
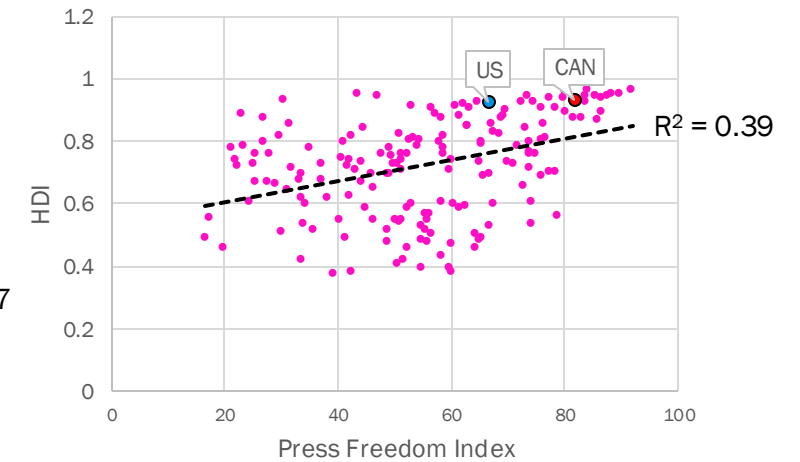
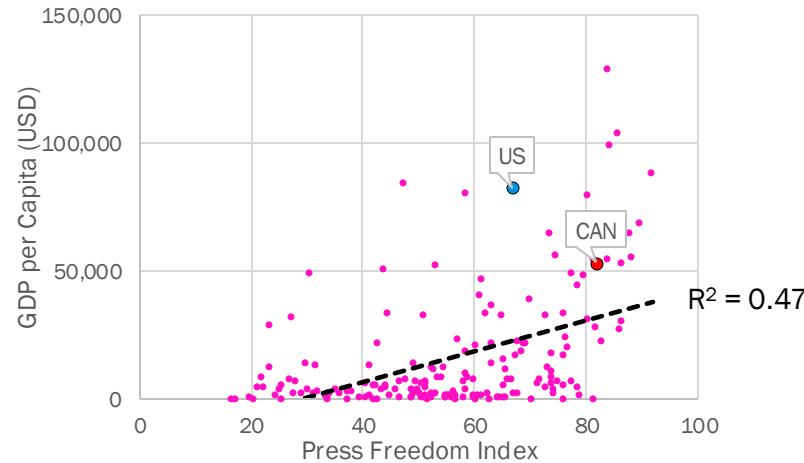
# Press freedom and journalistic pluralism



Nordicity's analysis of the Press Freedom Index in relation to a range of economic and development indicators found that greater degrees of press freedom are positively and statistically associated with greater levels of economic growth, human development outcomes, education and reduced income inequality.

Statistical analysis also finds positive and significant correlation between press freedom and these indicators.

Nordicity's analysis and the wider research all point towards statistically significant relationships and positive correlations between greater press freedom and economic growth and development. However, as found by Alam and Shah (2013), these relationships are often bidirectional. That is, greater press freedom creates better economic and social environments, but these environments also foster greater press freedom.



Source: Nordicity Analysis of data from World Bank, Reporters Without Borders and UN.

Note: No adult literacy data available for the US.

\* Higher GINI coefficients mean greater levels of income inequality, negative correlation supports the hypothesis that greater degrees of press freedom is associated with reduced income inequality. Canada ranks 44<sup>th</sup> for GINI coefficient whereas the US only ranks 123<sup>rd</sup>.

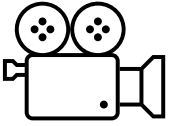


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# Appendix A: Canadian independent television production case studies



# Canadian independent television production case studies



## Sector impact: Canadian production companies

CBC's investment in independent original Canadian production strengthens Canadian-owned production companies across the country, contributing to regional employment opportunities, ensuring regional voices are represented, and supporting Canadian companies' IP development.

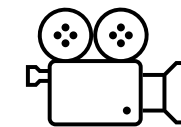
- Regionally-based production companies work with CBC programs such as *The Nature of Things* to expand their capacity and business opportunities through international coproductions. Examples include Merit Motion Pictures in Manitoba, Sea to Sea Productions in Nova Scotia, and Galafilm Productions in Québec.
- CBC's investment in the development of scripted content also contributes to securing international partners such as Netflix for CBC's *North of North* series.
- CBC plays a role in attracting and securing major global financing partners opening new opportunities and markets for Canadian production companies.

**CBC investment in independent Canadian television production raises Canada's profile and strengthens its audiovisual industry nationally and internationally.**

**CBC's investments in the development of original, first run Canadian content including scripted, unscripted and documentary have contributed to strengthening numerous Canadian-owned production companies and raising their profile in the global audiovisual market.**



# Canadian independent television production case studies



## Sector impact: talent development

Through independent productions like *Still Standing*, *Allegiance*, and *Son of a Critch* CBC supports the development of new creative talent in Canada through writing, directing, and showrunner mentorship programs.

*Still Standing* has mentorship programs for writer, director, and showrunner positions and a mentee was hired into a main role.

*Allegiance* provided Supinder Wraich with her first lead role in an ongoing series. CBC has supported this Canadian actor, writer, and producer for a number of years commissioning her CBC Gem short-form series *The 410*.

Over its four seasons to date, *Son of a Critch* has provided mentorship and work opportunities for 3 local writers, 2 local directors, 1 local editor, and 45 to 55 local actors. It is also building local industry competency in sustainable production through training and use of a carbon calculator.

## Screen tourism

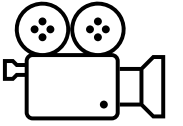
*Still Standing*, a travelogue, documentary, reality, comedy show shot its 100<sup>th</sup> episode in 2023, representing over 52 hours of content featuring Canadian rural and remote communities.

**“The show has definitely brought people to the village.... a group of people that came last summer that travel together to visit ALL the places that have been featured on Still Standing (they had a custom banner that they brought with them for taking photos in front of places featured in the show)....whenever it airs we see an increase in our online orders.”**  
(Angela Roest, Centre and Main Chocolate Co.)

**“A lot of visitors mentioned not having heard about our museum until they saw us on Still Standing and people from all over Manitoba and even Ontario said they were visiting us because they had seen the show...”**  
(Adolfo Cuetara, Canadian Fossil Discovery Centre)



# Canadian independent television production case studies



**10 seasons, filmed in 113 towns across Canada.**

**Average budget of \$575,000 per episode with 15% spent locally, and 30% flowing to high-skill below-the-line independent workers.**

**Average crew size of 70 professionals, 5 – 10% of whom are hired locally.**

## Audience impact

### Season 7, Episode 1 (Hope BC)

*“Positive impact – highlighting Indigenous history & culture, movie industry, parks, etc.*

*It was also a major boost to have an event and the ability to gather as we were just coming out of COVID restrictions – if we had been able to have a larger venue, I know the town would’ve filled the seats!”*

*(Noelle Hartt, Hope Search and Rescue)*

## Industry impact

*Still Standing* is produced by Winnipeg-based Frantic Films. The show explores small towns across Canada, showcasing their unique stories and humour and featuring Canadian comedian Jonny Harris performing stand-up for local residents.

CBC’s investment in independent productions like *Still Standing*, **contributes to provincial and local economies** by providing work as production assistants, drivers, security detail, and food servers; and by purchasing local supplies and services such as catering, rental car, gas, accommodations, dry cleaning, props, location supplies (chairs, tents, etc.) and venue rentals.

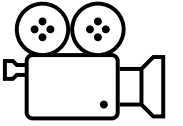
*Still Standing* has generated **tourism activity, encouraging viewers to explore Canada**. A Facebook group was formed by people traveling across Canada to visit towns where the show was shot.

The series is available on Tubi, Amazon Prime, The Roku Channel, and Pluto TV in the US.





# Canadian independent television production case studies



## Audience impact

Premiering in winter 2024, *Allegiance* was CBC's most-watched new series of the 2023-24 season.\*

Created and executive produced by Anar Ali, an internationally recognized Canadian writer who was born in Tanzania, grew up in small town Canada, and now lives in Toronto.

**2 seasons or 19 episodes filmed in British Columbia.**

**Allegiance contributed over \$60 million to the BC and Canadian economies, 99% of supplies and services were sourced locally.**

**With a per season budget of over \$30 million, roughly 44% is spent on below the line positions and background performers.**

**Average daily crew size of 200 industry professionals and an average of 1,600 background performers hired each season.**

**99% of the crew and 100% of the background performers live within 50 km of filming.**

**6/10 directors, 6/10 writers, and 9/12 key cast positions were held by local talent.**

## Industry impact

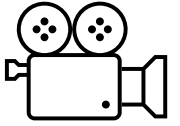
The show is about a star rookie police officer, played by Supinder Wraich, who must grapple with the limits of the justice system as she fights to exonerate her politician father and serve her diverse hometown of Surrey.

It is produced by Vancouver-based Lark Productions with Universal International Studios and filmed in Surrey, Langley, Maple Ridge, Vancouver, and in and around the lower mainland of British Columbia.

\*Source: Numeris TV Meter, 2/7/2024 - 4/10/2024, CBC Total, Ind.2+, Wed. 8p-10p, Total Canada, AMA, generated by Instar.



# Canadian independent television production – Case Studies



## Audience impact

Since its premiere in January 2022, the series is the most-watched original Canadian comedy and among the top 5 comedies in Canada. It is also one of the most-streamed comedies on CBC Gem.

Nominated for many awards, the series won the Cogeco Fund Audience Choice at the Canadian Screen Awards in 2024.

*\*Source: Numeris TV Meter, 9/18/2023 - 4/14/2024, Total TV English, Ind.2+, M-Su 7p-11p, Total Canada, AMA, generated by Instar., and Adobe Analytics, CBC Production, OTT Segment, On-Demand Video segment, Total Content Starts, Sept. 1, 2023-Apr. 30, 2024*

**4 seasons or 52 episodes filmed in St. John's Newfoundland.**

**Average budget of \$19 million per season with 70 to 85% spent locally on wages, supplies, and services.**

**Crew size ranges from 125 to 165 industry professionals with 30 to 50 background performers hired per episode.**

**78 % of crew and 99% of background performers live within 50 km of filming.**

## Industry impact

The series was created by Mark Critch, a Canadian comedian, and Tim McAuliffe, a Canadian writer and showrunner. It is based on Critch's award-winning memoir of the same name about coming-of-age story in Newfoundland in the 1980s.

The series is produced by Project 10 Productions and Take the Shot Productions. It is distributed by Lionsgate in Canada. The CW, a US commercial network, joined CBC and Lionsgate as investors and distributors.

The series is distributed internationally by Paramount+ in the UK, by RTÉ One and RTÉ Player in Ireland.





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# Appendix B: Methodology notes



# Independent production impact methodology

## Conventional television (CBC TV)

- Licence fees are estimated by removing expenditure on ‘non-first run programming’ from Canadian expenditure on ‘programs acquired from independent producers’ as per the CBC conventional TV CRTC annual aggregate returns (2023).
- Total production budgets are estimated based on the ratio of CBC TV production budgets to licence fee amounts of independent productions broadcast in 2023 in the 2023/2024 Video Production Report.

Acquired from independent producers	184,531
Non-first run programs	28,364
<b>Licence fee</b>	<b>156,167</b>
Licence fee: Total budgets	3.17
<b>Total production budgets</b>	<b>494,755</b>

## Discretionary television (CBC News Network, Documentary Channel)

- English and French services are reported together in CRTC annual aggregate returns for discretionary television (2023).
- The language shares of total spending on the acquisition of rights across all of CBC/Radio Canada’s discretionary services (i.e., CBC News Network, Documentary Channel, ICI RDI, ICI ARTV and ICI Explora) was used to apportion and estimate the total licence fees for CBC/Radio-Canada’s English and French discretionary services, respectively.

## Digital television services (CBC GEM)

- The value of production budgets and licence fees for CBC English digital services are taken directly from the 2023/24 Video Production Report.



# Connecting remote communities to news and information impact methodology

The estimation of the number of households in remote communities that benefit from access to CBC's over-the-air network was based on the following approach:

- CBC/Radio-Canada document Q-3345, table D, provides data on the location of CBC transmission licences, and number of households serviced by these licences.
- The locations of these licences are matched to communities defined by Statistics Canada as a rural and remote community, giving an estimate to the total number of households in rural and remote communities serviced by CBC/Radio-Canada transmission.
- Total households in rural and remote communities serviced by CBC's over-the-air network = 664,837
- The number of these households serviced by CBC English services are estimated based on the ratio of Anglophone to Francophone first language households in the specific province or territory where the remote community is located. This ratio is derived Statistics Canada data (447,807).
- The share of these households without internet connection is derived from the percentage of rural households with access to internet speeds of 10 Mbps upload and 50 Mbps download in 2023 (Figure 22, [2025 Policy Monitoring report, CRTC](#)).  $447,807 \times 21.8\% = 97,622$ .

CBC's over-the-air network provides broadcast signals to 447,807 rural households in Anglophone communities, of which an estimated 97,622 do not have access to broadband internet services (50 Mbps download / 10 Mbps upload). These figures are estimated based on data from CBC/Radio-Canada, Statistics Canada and the CRTC.



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## **About Nordicity**

### **Strategy, policy and economic analysis for the global digital, creative and communications industries**

Nordicity is a leading international consulting firm providing private and public-sector clients with solutions for Economic Analysis, Strategy and Business, and Policy and Regulation across four priority sectors: arts, culture and heritage; digital and creative media; and information and communication technologies (ICTs) and innovation. With offices in London (UK), Toronto, and Vancouver Nordicity is ideally placed to assist our clients to succeed in the rapidly evolving global markets.