



FRIENDS OF CANADIAN BROADCASTING



Views on Local News in Five “At Risk” Markets
Friends of Canadian Broadcasting
submitted by Nanos, August 28, 2014 (Submission 2014-564B)

Executive Summary

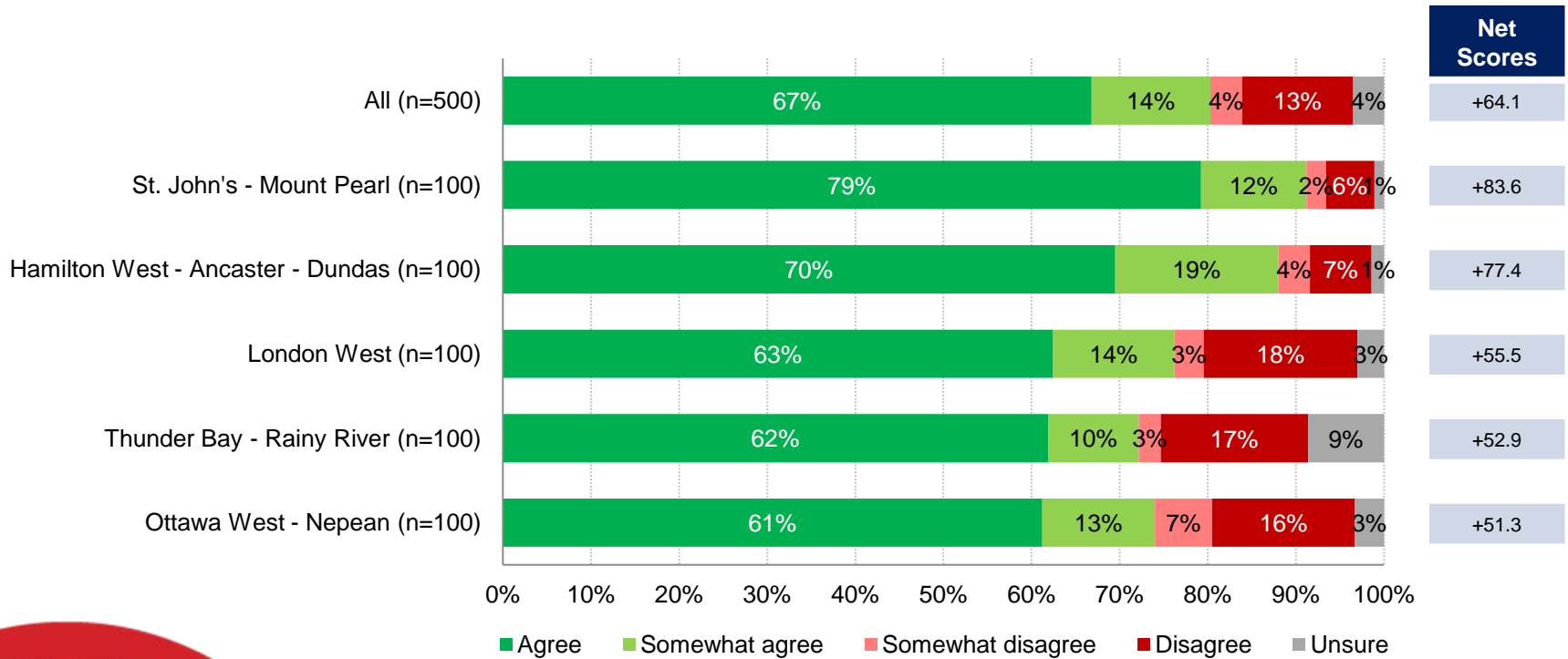


In order to understand the nuance of opinion related to TV broadcasting in Canada among communities which may be affected by changes in Canada's broadcasting rules, Nanos conducted a special study of communities "at risk" of either scaled back local news or of their local TV station closing. Federal ridings in those communities were used to geographically define the sample using the new riding boundaries. The key findings are as follows:

- there is a very significant level of value constituents derive from the local TV news in their community;
- constituents in the five ridings would deeply care if local news stopped broadcasting in their community;
- a comfortable majority of constituents in all the five ridings agree or somewhat agree that the CRTC should avoid changes that would undermine local TV stations;
- there is a very strong appetite for local MPs to engage and support keeping local broadcasting strong;
- constituents believe local TV news contributes to making their community stronger; and,
- only a very small minority (about one in ten) believe CBC funding should decrease while 44 percent believe it should stay the same and another 40 percent believe it should increase.

Value of Local TV News

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding**

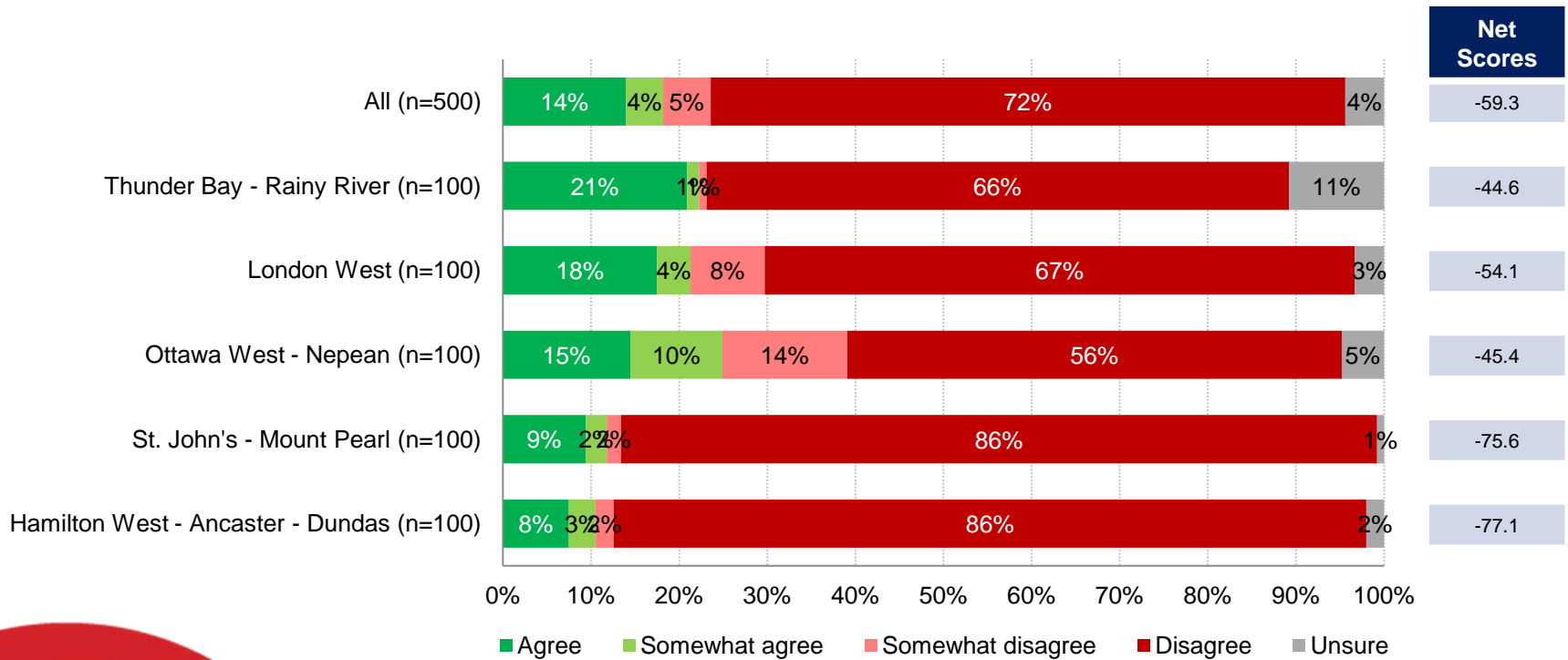
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

Local TV news on [INSERT PRIVATE STATION] in [NAME OF COMMUNITY] is valuable to me.

A very strong majority of Canadians in all the five target ridings agree or somewhat agree that local TV news is valuable to them.

Broadcasting Local News

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding**

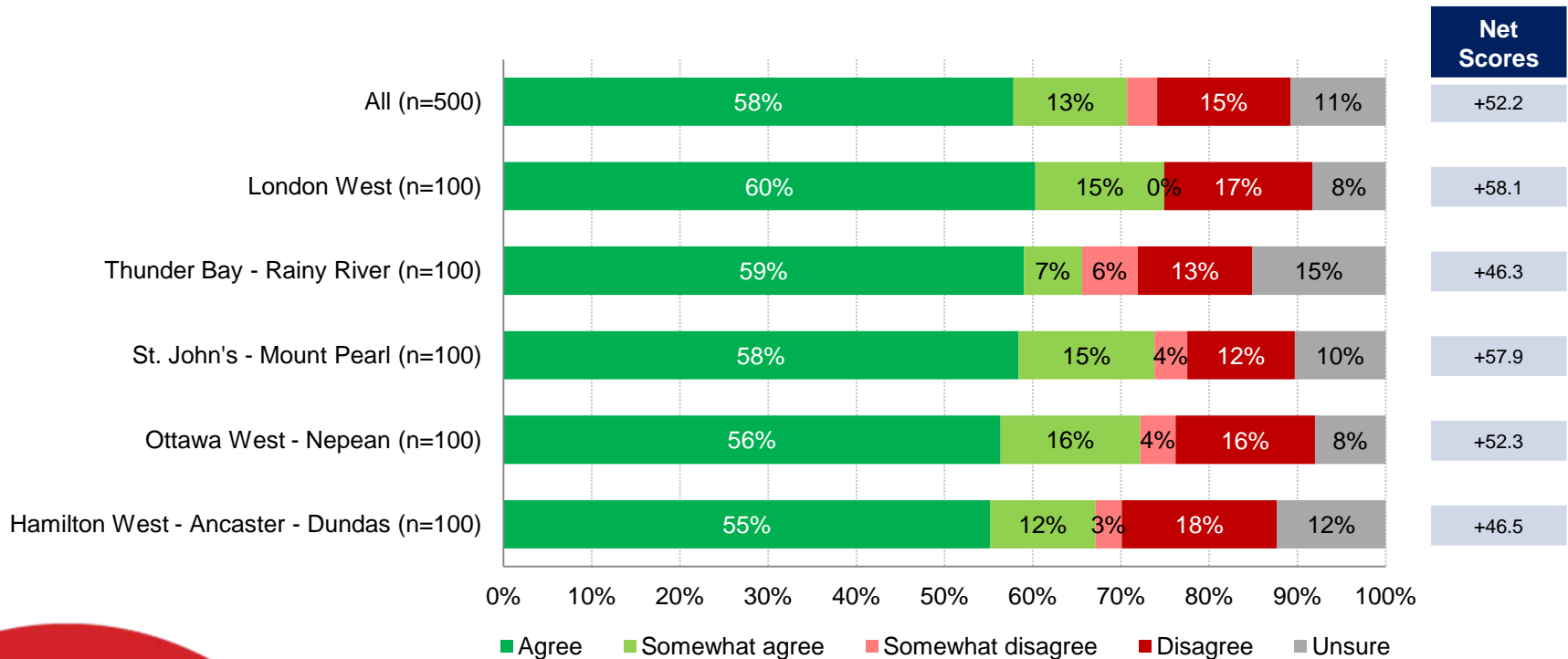
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

I would not care if [INSERT PRIVATE STATION] in [NAME OF COMMUNITY] stopped broadcasting local news.

The research suggests that there would be a significant negative reaction if the broadcasting of local news stopped.

CRTC Changes

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding**

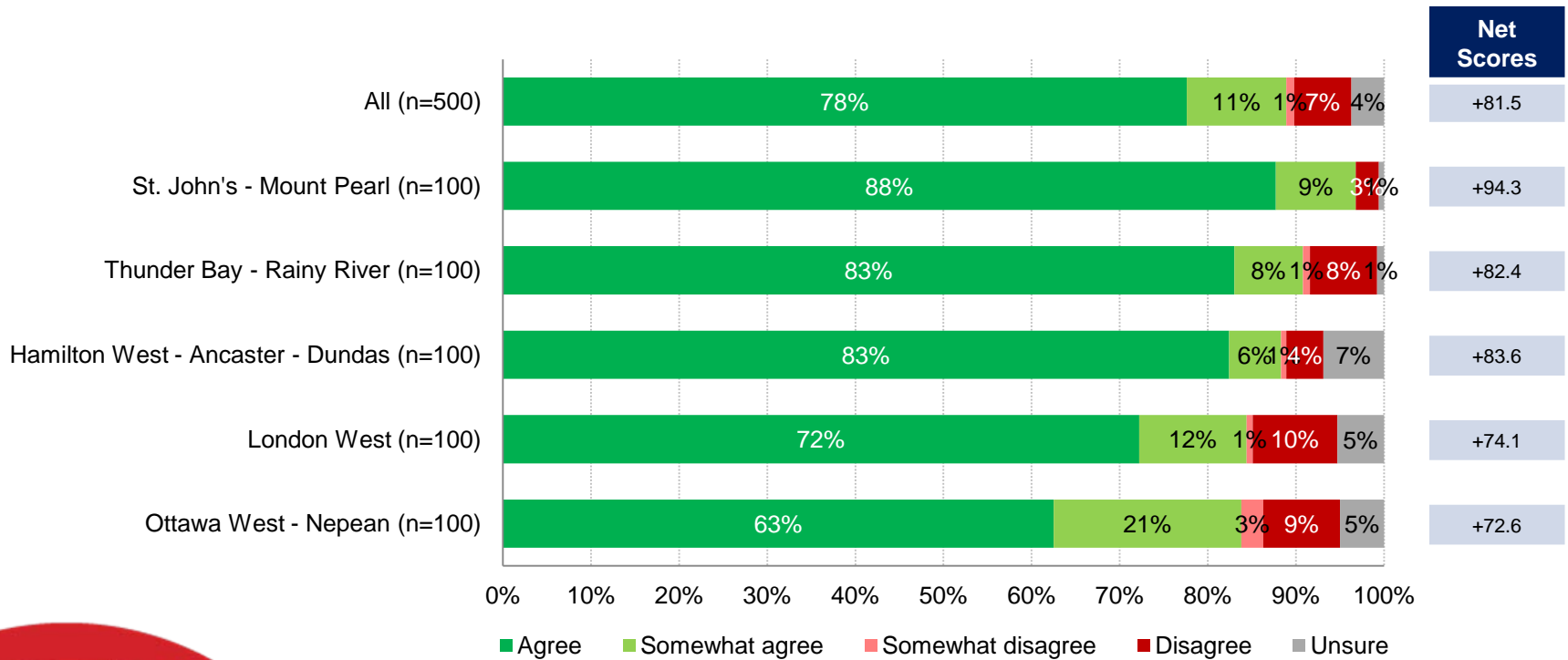
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

The CRTC should avoid regulatory changes that would undermine my local TV station.

A majority of constituents in all the ridings agree or somewhat agree that the CRTC should avoid changes that would undermine the local TV stations.

Strong Local Broadcasting

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



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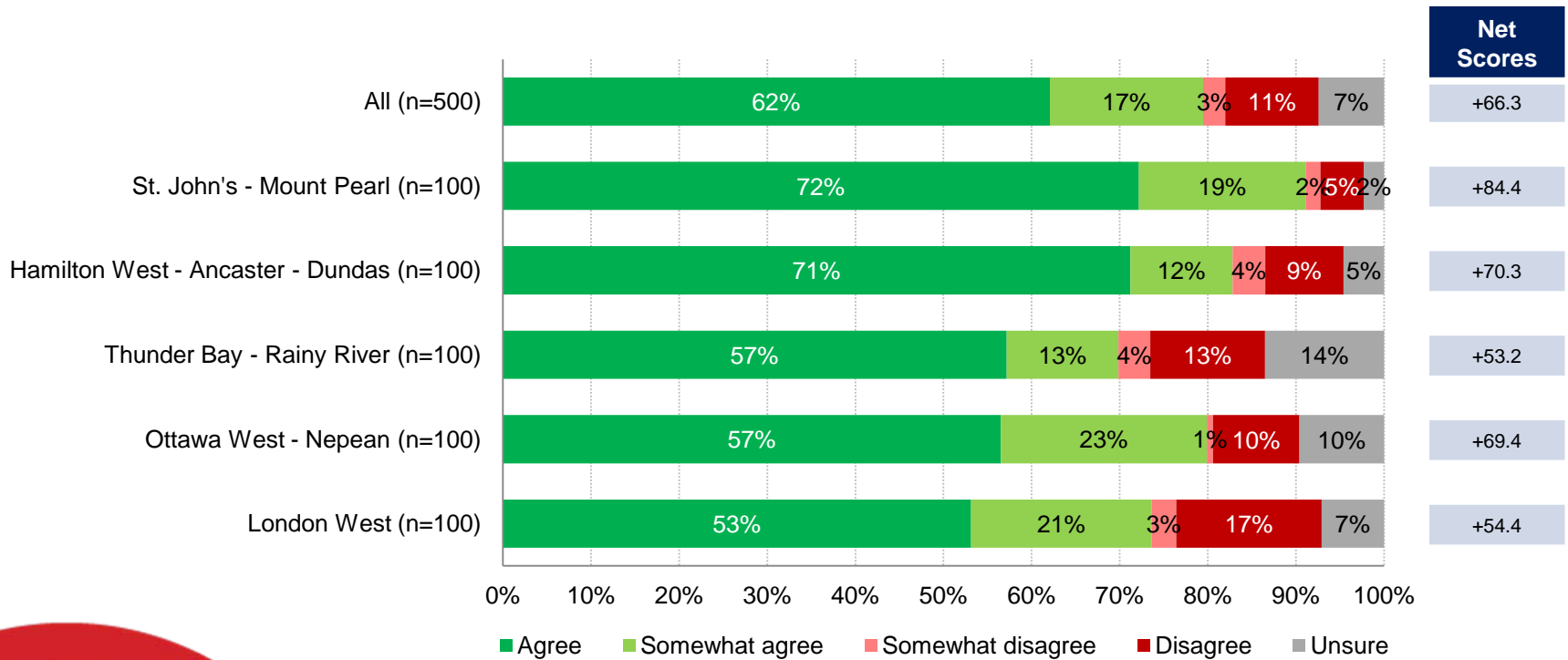
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

My federal Member of Parliament should work to keep local broadcasting strong in my community.

There is a significant appetite for the federal MPs to work to keep local broadcasting strong.

Stronger Community

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding**

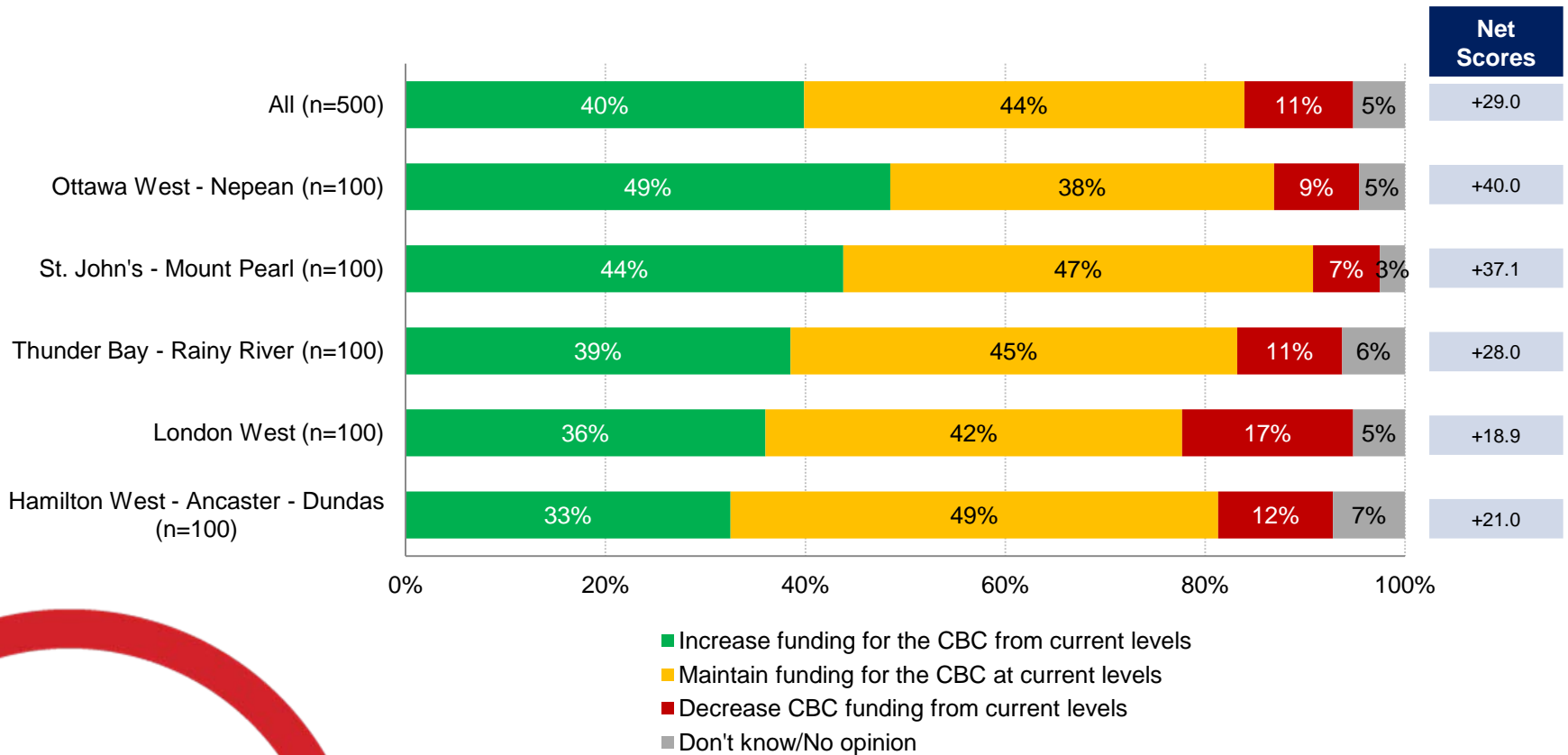
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

Local TV news on [INSERT PRIVATE STATION] contributes to making my community stronger.

A majority of constituents in all the five “at risk” ridings agree or somewhat agree that their local TV news contributes to making their community stronger.

CBC Funding Advice

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



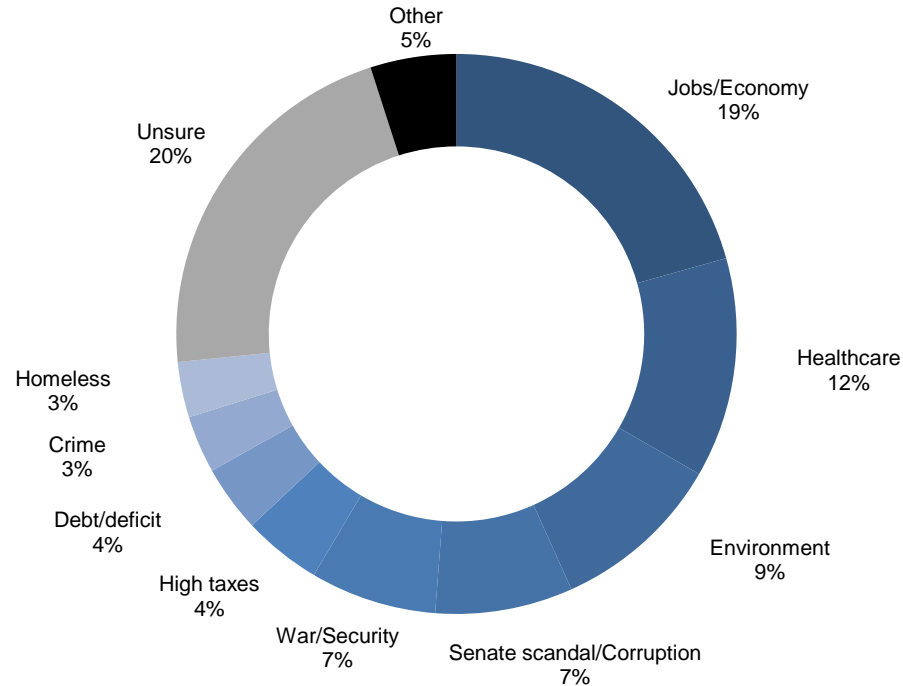
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Assume for a moment that your federal Member of Parliament asked for your advice on an upcoming vote in the House of Commons on what to do about CBC funding. Which of the following three options would you advise him/her to vote for?

Only a small minority of constituents want to see CBC funding decrease. In Ottawa West – Nepean, the intensity of support for CBC funding is higher than other ridings.

Most Important National Issue

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



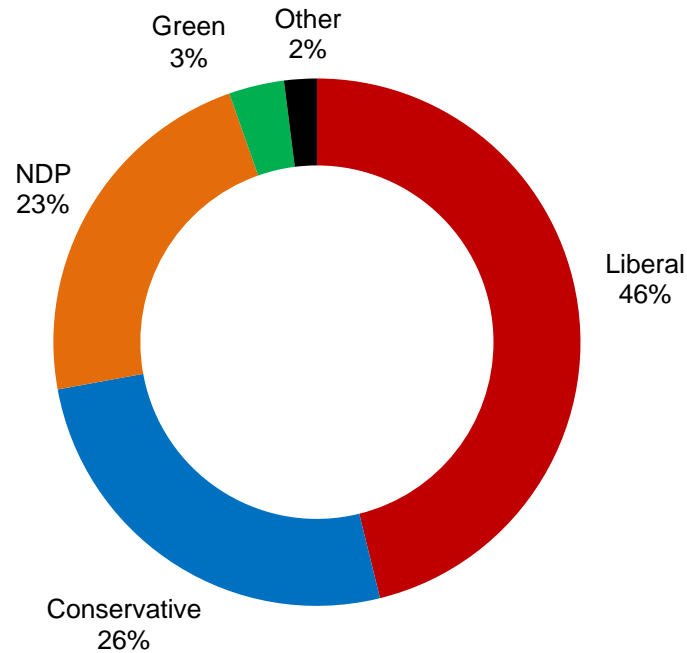
***Note: Charts may not add up to 100 due to rounding**

QUESTION – What is your most important NATIONAL issue of concern?

Canadians in the “at risk” ridings identified by The Friends of Canadian Broadcasting mention jobs/economy and healthcare as their top national issues of concern.

Ballot

Source: Nanos Research, random telephone survey in five target "at risk" ridings, August 23rd to 26th, 2014, n=418, accurate 4.4 percentage points plus or minus, 19 times out of 20.



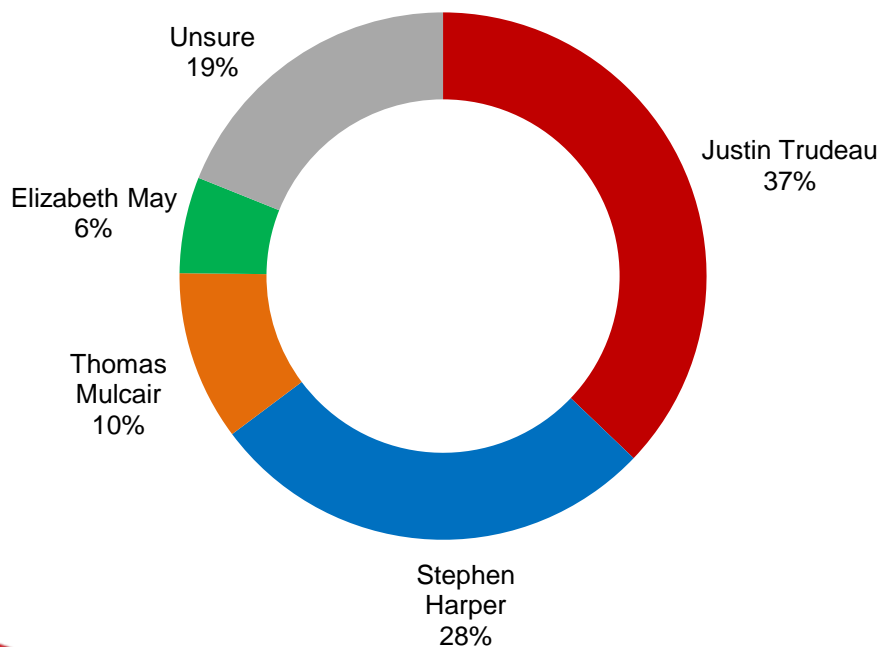
***Note: Charts may not add up to 100 due to rounding**

QUESTION – For those parties you would consider voting for FEDERALLY, could you please rank your top two local party preferences? [Unprompted] [First ranked response]

Factoring only the five ridings, the Liberals have a noticeable advantage over both the Conservatives and the NDP. Readers should note that this sub-set of five federal ridings is not projectable to the Canadian populace.

Preferred Prime Minister

Source: Nanos Research, random telephone survey in five target “at risk” ridings, August 23rd to 26th, 2014, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



Ridings	Top Preference
All (n=500)	Trudeau 37.1%
London West (n=100)	Harper 26.7%
Ottawa West – Nepean (n=100)	Trudeau 37.6%
Hamilton West – Ancaster – Dundas (n=100)	Harper 29.9%
Thunder Bay – Rainy River (n=100)	Trudeau 33.2%
St. John’s – Mount Pearl (n=100)	Trudeau 58.2%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – As you may know Justin Trudeau is the leader of the federal Liberal party, Steven Harper is the leader of the Conservative Party of Canada, Mario Beaulieu is the leader of the Bloc Quebecois, Thomas Mulcair is the leader of the federal NDP and Elizabeth May is the leader of the federal Green Party. Of the current federal political party leaders, could you please rank your top two current preferences for Prime Minister? [FIRST RANKED RESPONSE]

Trudeau receives a noticeable ten point advantage over Harper on the preferred Prime Minister front in the “at risk” ridings. The riding of St. John’s – Mount Pearl is a noticeable contributor to the Trudeau scores on this measure.

PATH FORWARD!

WINNING CONDITIONS

DIAGNOSE ENV

VALIDATE

TEST IDEAS

REVIEW RESEARCH



Methodology

Methodology

Nanos conducted a random telephone survey using live agents of 100 residents of five federal ridings, for a total of 500 respondents. This research was conducted between August 23rd and August 26th, 2014. The dual frame sample included both land- and cell-lines. The results were statistically checked and weighted by age and gender using the latest Census information. Ridings were selected as being “at risk” in terms of local news being scaled back or a station at risk of closing. Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 500 respondents is ± 4.4 percentage points, 19 times out of 20. The margin of error for a subsample of 100 respondents in a constituency is ± 10.0 percentage points, 19 times out of 20.

The research was commissioned by the Friends of Canadian Broadcasting.

Note: Charts may not add up to 100 due to rounding.

The ridings* and stations mentioned were as follows:

- London West (CFPL-TV, your CTV affiliate)
- Ottawa West – Nepean (CJOH-TV)
- Hamilton West – Ancaster – Dundas (CHCH-TV)
- Thunder Bay – Rainy River (Thunderbay-TV)
- St. John’s – Mount Pearl (NTV)

*New boundaries were used for each riding. The ridings were selected by the Friends of Canadian Broadcasting.

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations



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Question 1 - What is your most important NATIONAL issue of concern?

		Frequency	Percent	Valid Percent
Valid	Jobs/economy	94	18.7	18.7
	Healthcare	57	11.5	11.5
	Environment	45	9.0	9.0
	Senate scandal/corruption	36	7.2	7.2
	War/security	33	6.6	6.6
	Other	23	4.5	4.5
	High taxes	20	4.1	4.1
	Debt/deficit	18	3.5	3.5
	Crime	15	3.0	3.0
	Homeless	14	2.9	2.9
	Seniors issues	12	2.4	2.4
	Education	11	2.2	2.2
	Immigration	7	1.3	1.3
	Cost of living	5	.9	.9
	National unity	4	.8	.8
	Cuts to CBC/Radio Canada	3	.6	.6
	Pipelines	3	.6	.6
	Gas prices	1	.2	.2
	Cost of living	1	.2	.2
	Cell phone fees	1	.1	.1
	Treatment of veterans	1	.1	.1
	Unsure	98	19.6	19.6
	Total	500	100.0	100.0

Nanos conducted a random telephone survey using live agents of 100 residents of five federal ridings, for a total of 500 respondents. This research was conducted between August 23rd and 26th, 2014. The dual frame sample included both land- and cell-lines. The margin of error for a random survey of 500 respondents is ± 4.4 percentage points, 19 times out of 20.

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		Question 2 (first ranked response) - For those parties you would consider voting for FEDERALLY, could you please rank your top two local party preferences?						
		Total	Liberal	Conservative	NDP	Green	Other	Undecided
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	36.0	21.2	17.9	2.8	1.5	20.7
	Hamilton West-Ancaster-Dundas	100	37.3	22.6	12.4	2.6	.0	25.2
	London West	100	26.4	29.5	21.0	2.1	2.6	18.4
	Ottawa West-Nepean	100	35.7	21.6	16.1	4.5	.0	22.0
	St. John's-Mount Pearl	100	44.9	15.6	18.2	1.2	4.0	16.0
	Thunder Bay-Rainy River	100	35.5	16.5	21.7	3.8	.9	21.7
	Gender	Male	250	31.3	24.2	16.6	3.8	2.2
	Female	250	40.7	18.1	19.1	1.9	.8	19.4
Age	18 to 29	102	38.5	13.6	20.3	5.7	2.5	19.5
	30 to 39	84	37.6	18.1	21.8	2.1	1.5	18.9
	40 to 49	108	35.1	18.2	20.8	3.0	1.1	21.7
	50 to 59	87	42.9	23.5	11.3	.8	.6	20.9
	60 plus	118	28.3	30.9	15.1	2.2	1.7	21.9

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		Question 2 (second ranked response) - For those parties you would consider voting for FEDERALLY, could you please rank your top two local party preferences?						
		Total	Liberal	Conservative	NDP	Green	Other	Undecided
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	397	25.4	16.0	28.0	6.2	1.0	23.4
	Hamilton West-Ancaster-Dundas	75	22.2	15.8	21.9	8.0	3.9	28.2
	London West	82	41.8	10.2	18.4	5.8	.7	23.1
	Ottawa West-Nepean	78	14.9	11.7	38.4	11.8	.0	23.3
	St. John's-Mount Pearl	84	24.6	24.0	35.5	1.5	.7	13.6
	Thunder Bay-Rainy River	78	22.7	17.8	25.2	4.4	.0	29.9
	Gender	Male	195	29.5	16.1	22.7	6.3	1.2
	Female	202	21.4	15.9	33.1	6.1	.9	22.6
Age	18 to 29	83	25.2	20.3	23.3	7.0	.0	24.2
	30 to 39	68	20.3	17.2	31.5	15.2	.0	15.7
	40 to 49	85	28.5	16.0	28.9	1.3	3.5	21.9
	50 to 59	69	20.6	15.3	34.1	3.6	1.7	24.8
	60 plus	92	30.1	11.7	24.0	5.4	.0	28.9

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		Question 3 (undecided voters only) - Are you currently leaning towards any particular FEDERAL party, and if you are, which party would that be?					
		Total	Liberal	Conservative	NDP	Other	Still undecided
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	103	12.7	2.9	4.5	.7	79.3
	Hamilton West-Ancaster-Dundas	25	7.9	4.5	2.3	.0	85.3
	London West	18	6.7	10.1	3.7	.0	79.5
	Ottawa West-Nepean	22	21.9	.0	2.6	3.1	72.4
	St. John's-Mount Pearl	16	17.2	.0	8.6	.0	74.2
	Thunder Bay-Rainy River	22	10.7	.0	6.5	.0	82.8
Gender	Male	55	10.0	2.3	3.1	1.3	83.4
	Female	48	15.7	3.6	6.0	.0	74.7
Age	18 to 29	20	8.6	.0	.0	.0	91.4
	30 to 39	16	11.1	.0	.0	.0	88.9
	40 to 49	24	12.7	5.0	3.5	.0	78.8
	50 to 59	18	14.2	3.1	9.2	.0	73.4
	60 plus	26	15.8	4.8	8.2	2.7	68.5

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		Vote Profile						
		Total	Liberal	Conservative	NDP	Green	Other	Undecided
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	38.6	21.8	18.8	2.8	1.6	16.4
	Hamilton West-Ancaster-Dundas	100	39.2	23.7	13.0	2.6	.0	21.5
	London West	100	27.7	31.4	21.7	2.1	2.6	14.6
	Ottawa West-Nepean	100	40.5	21.6	16.6	4.5	.7	16.0
	St. John's-Mount Pearl	100	47.7	15.6	19.6	1.2	4.0	11.9
	Thunder Bay-Rainy River	100	37.8	16.5	23.1	3.8	.9	17.9
Gender	Male	250	33.5	24.7	17.3	3.8	2.4	18.3
	Female	250	43.7	18.8	20.3	1.9	.8	14.5
Age	18 to 29	102	40.1	13.6	20.3	5.7	2.5	17.8
	30 to 39	84	39.7	18.1	21.8	2.1	1.5	16.8
	40 to 49	108	37.8	19.3	21.6	3.0	1.1	17.1
	50 to 59	87	45.8	24.2	13.2	.8	.6	15.3
	60 plus	118	31.7	31.9	16.9	2.2	2.3	15.0

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		Ballot					
		Total	Liberal	Conservative	NDP	Green	Other
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	418	46.2	26.0	22.5	3.4	2.0
	Hamilton West-Ancaster-Dundas	78	50.0	30.2	16.5	3.3	.0
	London West	85	32.4	36.7	25.4	2.5	3.0
	Ottawa West-Nepean	84	48.2	25.7	19.8	5.4	.8
	St. John's-Mount Pearl	88	54.1	17.7	22.2	1.3	4.6
	Thunder Bay-Rainy River	82	46.1	20.1	28.2	4.6	1.1
Gender	Male	204	41.0	30.2	21.2	4.7	3.0
	Female	214	51.1	22.0	23.7	2.2	1.0
Age	18 to 29	84	48.8	16.5	24.7	6.9	3.0
	30 to 39	70	47.7	21.7	26.2	2.5	1.8
	40 to 49	90	45.7	23.3	26.0	3.7	1.3
	50 to 59	74	54.1	28.6	15.6	1.0	.7
	60 plus	100	37.3	37.5	19.9	2.6	2.6

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Question 4 (first ranked response) - As you may know Justin Trudeau is the leader of the federal Liberal Party, Stephen Harper is the leader of the Conservative Party of Canada, Thomas Mulcair is the leader of the federal NDP, Mario Beaulieu is the leader of the Bloc Quebecois, Thomas Mulcair is the leader of the federal NDP and Elizabeth May is the leader of the federal Green Party. Of the current federal political party leaders, could you please rank your top two current preferences for Prime Minister?

		Total	Justin Trudeau	Stephen Harper	Thomas Mulcair	Elizabeth May	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	37.1	27.6	10.4	5.9	18.9
	Hamilton West-Ancaster-Dundas	100	29.9	39.3	3.1	3.4	24.3
	London West	100	26.7	33.5	14.2	6.1	19.5
	Ottawa West-Nepean	100	37.6	22.3	10.0	14.7	15.4
	St. John's-Mount Pearl	100	58.2	16.9	13.2	.0	11.7
	Thunder Bay-Rainy River	100	33.2	26.1	11.7	5.1	23.9
Gender	Male	250	36.0	29.7	10.7	4.0	19.6
	Female	250	38.3	25.6	10.1	7.7	18.3
Age	18 to 29	102	37.0	16.7	10.1	7.3	28.8
	30 to 39	84	43.7	22.5	8.5	6.6	18.7
	40 to 49	108	36.8	28.7	10.1	6.4	18.0
	50 to 59	87	36.8	30.4	14.3	4.4	14.1
	60 plus	118	33.1	37.8	9.5	4.7	14.9

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Question 4 (second ranked response) - As you may know Justin Trudeau is the leader of the federal Liberal Party, Stephen Harper is the leader of the Conservative Party of Canada, Thomas Mulcair is the leader of the federal NDP, Mario Beaulieu is the leader of the Bloc Quebecois, Thomas Mulcair is the leader of the federal NDP and Elizabeth May is the leader of the federal Green Party. Of the current federal political party leaders, could you please rank your top two current preferences for Prime Minister?

		Total	Justin Trudeau	Stephen Harper	Thomas Mulcair	Elizabeth May	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	405	24.8	11.0	33.1	8.5	22.7
	Hamilton West-Ancaster-Dundas	76	23.2	3.7	30.8	12.1	30.2
	London West	80	31.4	12.1	25.9	9.4	21.2
	Ottawa West-Nepean	85	16.1	9.8	41.6	10.3	22.3
	St. John's-Mount Pearl	88	22.9	14.7	38.8	6.1	17.5
	Thunder Bay-Rainy River	76	31.3	13.9	26.8	4.7	23.2
Gender	Male	201	26.3	12.0	34.9	9.1	17.7
	Female	204	23.4	9.9	31.3	7.9	27.5
Age	18 to 29	73	21.0	22.5	33.4	7.6	15.5
	30 to 39	68	19.4	11.4	32.8	10.4	26.0
	40 to 49	89	27.8	5.6	31.2	7.6	27.9
	50 to 59	75	28.5	11.2	32.4	8.9	19.0
	60 plus	100	25.9	6.8	35.2	8.4	23.7

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 5 - Local TV news on [INSERT PRIVATE STATION] in [NAME OF COMMUNITY] is valuable to me					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	66.8	13.5	3.6	12.6	3.5
	Hamilton West-Ancaster-Dundas	100	69.5	18.5	3.6	7.0	1.4
	London West	100	62.5	13.8	3.3	17.5	3.0
	Ottawa West-Nepean	100	61.2	12.8	6.5	16.2	3.3
	St. John's-Mount Pearl	100	79.3	12.0	2.2	5.5	1.1
	Thunder Bay-Rainy River	100	61.8	10.3	2.5	16.7	8.6
Gender	Male	250	67.9	12.3	3.9	15.2	.7
	Female	250	65.8	14.6	3.4	9.9	6.3
Age	18 to 29	102	60.7	19.5	5.7	14.1	.0
	30 to 39	84	57.7	15.6	4.6	15.5	6.6
	40 to 49	108	74.2	10.1	1.0	11.6	3.0
	50 to 59	87	75.5	4.8	4.4	13.6	1.6
	60 plus	118	65.4	16.2	3.1	9.3	6.1

Nanos conducted a random telephone survey using live agents of 100 residents of five federal ridings, for a total of 500 respondents. This research was conducted between August 23rd and 26th, 2014. The dual frame sample included both land- and cell-lines. The margin of error for a random survey of 500 respondents is ± 4.4 percentage points, 19 times out of 20.

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2014-564B – FRIENDS OF CANADIAN BROADCASTING MARKET STUDY – STAT SHEET

Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 6 - I would not care if [INSERT PRIVATE STATION] in [NAME OF COMMUNITY] stopped broadcasting local news.					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	14.0	4.2	5.4	72.1	4.4
	Hamilton West-Ancaster-Dundas	100	7.5	3.0	2.1	85.5	2.0
	London West	100	17.5	3.8	8.4	67.0	3.3
	Ottawa West-Nepean	100	14.5	10.4	14.2	56.1	4.8
	St. John's-Mount Pearl	100	9.4	2.4	1.6	85.8	.8
	Thunder Bay-Rainy River	100	20.9	1.4	.8	66.1	10.8
Gender	Male	250	14.3	5.3	3.9	73.0	3.5
	Female	250	13.6	3.1	7.0	71.2	5.2
Age	18 to 29	102	16.0	4.9	2.0	77.1	.0
	30 to 39	84	19.7	4.6	6.4	65.3	3.9
	40 to 49	108	10.5	4.9	11.2	70.2	3.3
	50 to 59	87	16.0	3.2	4.3	73.0	3.5
	60 plus	118	9.7	3.3	3.2	73.7	10.1

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2014-564B – FRIENDS OF CANADIAN BROADCASTING MARKET STUDY – STAT SHEET

Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 7 - The CRTC should avoid regulatory changes that would undermine my local TV station					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	57.8	12.9	3.4	15.1	10.8
	Hamilton West-Ancaster-Dundas	100	55.2	11.9	3.0	17.6	12.3
	London West	100	60.3	14.6	.0	16.8	8.3
	Ottawa West-Nepean	100	56.3	15.8	4.0	15.8	8.0
	St. John's-Mount Pearl	100	58.4	15.4	3.7	12.2	10.3
	Thunder Bay-Rainy River	100	59.0	6.6	6.3	13.0	15.1
Gender	Male	250	53.8	11.9	4.2	19.3	10.8
	Female	250	61.9	13.8	2.7	10.9	10.8
Age	18 to 29	102	53.6	19.0	7.9	15.5	4.0
	30 to 39	84	55.8	18.5	.0	13.3	12.3
	40 to 49	108	59.9	9.4	2.2	16.9	11.6
	50 to 59	87	64.7	6.5	1.4	14.1	13.4
	60 plus	118	56.0	11.3	4.7	15.1	13.0

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 8 - My federal member of parliament should work to keep local broadcasting strong in my community					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	77.6	11.3	.9	6.5	3.7
	Hamilton West-Ancaster-Dundas	100	82.5	5.9	.6	4.2	6.9
	London West	100	72.2	12.2	.7	9.6	5.3
	Ottawa West-Nepean	100	62.5	21.3	2.5	8.7	5.0
	St. John's-Mount Pearl	100	87.8	9.1	.0	2.6	.6
	Thunder Bay-Rainy River	100	83.0	7.8	.8	7.6	.8
Gender	Male	250	73.5	13.9	1.3	6.9	4.3
	Female	250	81.7	8.6	.5	6.1	3.1
Age	18 to 29	102	77.4	15.0	.0	3.1	4.5
	30 to 39	84	73.6	8.4	.0	13.3	4.7
	40 to 49	108	74.4	13.8	1.1	5.5	5.3
	50 to 59	87	76.7	9.9	1.7	9.4	2.2
	60 plus	118	84.3	8.7	1.6	3.5	1.9

Nanos conducted a random telephone survey using live agents of 100 residents of five federal ridings, for a total of 500 respondents. This research was conducted between August 23rd and 26th, 2014. The dual frame sample included both land- and cell-lines. The margin of error for a random survey of 500 respondents is ± 4.4 percentage points, 19 times out of 20.



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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 9 - Local TV on [INSERT PRIVATE STATION] contributes to making my community stronger					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	62.0	17.4	2.5	10.6	7.4
	Hamilton West-Ancaster-Dundas	100	71.3	11.6	3.7	8.9	4.6
	London West	100	53.2	20.5	2.8	16.5	7.1
	Ottawa West-Nepean	100	56.5	23.4	.7	9.8	9.6
	St. John's-Mount Pearl	100	72.1	18.9	1.7	4.9	2.3
	Thunder Bay-Rainy River	100	57.1	12.7	3.6	13.0	13.5
Gender	Male	250	60.0	17.2	2.5	14.1	6.2
	Female	250	64.0	17.6	2.5	7.2	8.6
Age	18 to 29	102	52.3	22.4	.0	22.2	3.1
	30 to 39	84	57.7	19.8	3.8	8.7	10.0
	40 to 49	108	69.4	16.9	.8	6.8	6.2
	50 to 59	87	66.3	12.5	3.1	9.5	8.6
	60 plus	118	63.7	15.6	4.8	6.4	9.5

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		Question 10 - Assume for a moment that your federal Member of Parliament asked for your advice on an upcoming vote in the House of Commons on what to do about CBC funding. Which of the following three options would you advise him/her to vote for?				
		Total	Increase funding for the CBC from current levels	Maintain funding for the CBC at current levels	Decrease CBC funding from current levels	Don't know/no opinion
		Responses	Percentage	Percentage	Percentage	Percentage
Region	Market Study 2014-08	500	39.9	44.1	10.9	5.2
	Hamilton West-Ancaster-Dundas	100	32.5	48.8	11.5	7.2
	London West	100	36.0	41.7	17.1	5.2
	Ottawa West-Nepean	100	48.5	38.4	8.5	4.6
	St. John's-Mount Pearl	100	43.8	47.0	6.7	2.5
	Thunder Bay-Rainy River	100	38.5	44.7	10.5	6.3
Gender	Male	250	40.0	41.5	14.6	3.9
	Female	250	39.7	46.7	7.1	6.4
Age	18 to 29	102	33.4	55.1	8.2	3.3
	30 to 39	84	39.8	40.8	12.2	7.3
	40 to 49	108	42.4	45.9	5.6	6.1
	50 to 59	87	46.2	35.3	14.4	4.1
	60 plus	118	38.5	41.9	14.4	5.2

Nanos conducted a random telephone survey using live agents of 100 residents of five federal ridings, for a total of 500 respondents. This research was conducted between August 23rd and 26th, 2014. The dual frame sample included both land- and cell-lines. The margin of error for a random survey of 500 respondents is ± 4.4 percentage points, 19 times out of 20.



Questionnaire

2014-564B -FCB - Market Surveys Questionnaire

Hello, my name is _____ from Nanos Research. We're conducting a short three to five minute public opinion survey on broadcasting issues. We are not trying to sell anything and your responses will be strictly confidential. I was hoping you could share your opinions and answer a couple of questions?

- A. First of all, are you eligible to vote? (*i.e. 18 and over, Canadian Citizen*)
- Yes No (*ask if there is anyone else eligible to vote at home*)
- B. Do you or does anyone in your immediate family, work in any of the following occupations?
- Market research firm
 - TV, radio or news media
 - Political party
 - Advertising company

If "yes" to any of the above occupations, not planning to vote or ineligible to vote-thank & terminate.

Five ridings to be individually inserted, 100 respondents for each riding for a total of 500 respondents:

Riding	TV Station	Community
London West	CFPL-TV, your CTV affiliate	London
Ottawa West - Nepean	CJOH-TV	Ottawa
Hamilton West - Ancaster - Dundas	CHCH-TV	Hamilton
Thunder Bay - Rainy River	Thunderbay-TV	Thunder Bay
St. John's - Mount Pearl	NTV	St. John's

1. What is your most important NATIONAL issue of concern? [UNPROMPTED]

- Healthcare..... 1
- Education..... 2
- Jobs/economy..... 3
- Crime..... 4
- Debt/deficit..... 5
- High taxes..... 6
- Gas prices..... 7
- Environment..... 8
- Homeless..... 9
- Unsure..... 10
- Other..... 11

2. For those parties you would consider voting for FEDERALLY, could you please rank your top two local party preferences? [UNPROMPTED]

- | | Rank |
|--------------|--------------------|
| Liberal | _____ [Skip to Q4] |
| Conservative | _____ [Skip to Q4] |
| NDP | _____ [Skip to Q4] |
| Bloc | _____ [Skip to Q4] |
| Green | _____ [Skip to Q4] |
| Other | _____ [Skip to Q4] |
| Undecided | _____ [Go to Q3] |

3. Are you currently leaning towards any particular FEDERAL party, and if you are, which party would that be? [UNPROMPTED]

- Leaning Liberal1
- Leaning Conservative2
- Leaning NDP3
- Leaning Bloc4
- Leaning Green5
- Leaning other6
- Still undecided77

4. As you may know Justin Trudeau is the leader of the federal Liberal party, Steven Harper is the leader of the Conservative Party of Canada, Mario Beaulieu is the leader of the Bloc Quebecois, Thomas Mulcair is the leader of the federal NDP and Elizabeth May is the leader of the federal Green Party. Of the current federal political party leaders, could you please rank your top two current preferences for Prime Minister? [FIRST RANKED RESPONSE]

- | | Rank |
|----------------|--------------------|
| Justin Trudeau | _____ |
| Steven Harper | _____ |
| Thomas Mulcair | _____ |
| Mario Beaulieu | _____ |
| Elizabeth May | _____ |
| Unsure | _____ [Unprompted] |

Our next questions are about Canadian television.

Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

5. Local TV news on [INSERT PRIVATE STATION] in [NAME OF COMMUNITY] is valuable to me.
6. I would not care if [INSERT PRIVATE STATION] in [NAME OF COMMUNITY] stopped broadcasting local news.
7. The CRTC should avoid regulatory changes that would undermine my local TV station.
8. My federal member of parliament should work to keep local broadcasting strong in my community.
9. Local TV news on [INSERT PRIVATE STATION] contributes to making my community stronger

- Agree1
- Somewhat agree2
- Somewhat disagree3
- Disagree4
- Unsure77[Unprompted]

10. Assume for a moment that your federal Member of Parliament asked for your advice on an upcoming vote in the House of Commons on what to do about CBC funding. Which of the following three options would you advise him/her to vote for? [ROTATE]

- Increase funding for the CBC from current levels 1
- Maintain funding for the CBC at current levels 2
- Decrease CBC funding from current levels..... 3
- Don't know/No opinion 77 [Unprompted]

We're almost finished. My last couple of questions are just so we can group your responses.

11. What year were you born in? _____

12. Which of the following categories best reflects your HOUSEHOLD income [READ LIST]

- \$0 to \$14,999
- \$15,000 to \$29, 999
- \$30,000 to \$44,999
- \$45,000 to \$59,999
- \$60,000 to \$74,999
- \$75,000 or more
- Refuse [Unprompted]

13. What is the highest level of education you have completed [READ LIST]

- Some high school
- Completed high school
- Some college or university
- Completed college
- Completed university
- Completed graduate studies
- Refuse [Unprompted]

14. For verification purposes only, could you tell me your postal code? ____ ____ [Code for Rural]

15. Insert potential participation of online survey - standard question.

16. Gender (By observation -- do not ask)

- Male 1
- Female 2

Thank you very much for your time.

Telephone Number: () _____ -- _____ Interviewer: _____

Completion Date: _____ Completion Time: _____