Opinions of Canadians on the CBC

FCB Survey Summary

submitted by Nanos to Friends of Canadian Broadcasting, May 2017 (Submission 2017-1026)







A majority of Canadians agree or somewhat agree that the CBC plays an important role in strengthening Canadian culture and identity, and that a strong and vibrant CBC is needed

> A majority of Canadians agree or somewhat agree that in light of the corporate ownership of private media in Canada, a strong and vibrant CBC is more important than ever, as well as that the CBC plays an important role in Canadian culture and identity. Generally Canadians say the CBC's independence as a broadcaster has decreased or stayed the same, and most Canadians say if given the opportunity, they would advise their federal MP to either increase or maintain the CBC's funding.

Importance of the CBC

- The majority of Canadians agree or somewhat agree that it is important to have a strong and vibrant **CBC** – Nearly nine in ten Canadians agree (67%) or somewhat agree (19%) that with virtually all private news media in Canada being owned by only a few large corporations, it is more important than ever to have a strong and vibrant CBC. Four per cent somewhat disagree, while eight per cent disagree. Two per cent are unsure. These results are consistent with the 2015 and 2014 waves. Conservative Party voters were significantly more likely to disagree with this (24%), while NDP voters were the most likely to agree (82%).
- Almost nine in ten Canadians agree or somewhat agree that the CBC plays an important role in strengthening Canadian culture and identity – Just under nine in ten Canadians agree (68%) or somewhat agree (20%) that the CBC plays an important role in strengthening Canadian culture and identity, while two per cent somewhat disagree and eight per cent disagree. Two per cent are unsure. These results are consistent with the 2015 and 2014 waves. Once again, Conservative Party voters were much less likely to agree with this (42%) and more likely to disagree (23%) than voters for the other political parties and undecided voters.

Funding the CBC

The majority of Canadians say they would ask their MP to maintain or increase the CBC's funding -Forty-three per cent of Canadians say that if given the opportunity to provide advice to their federal MP on an upcoming vote in the House of Commons regarding CBC funding, they would advise the MP vote to increase funding. Thirty-nine per cent say they would advise voting to maintain funding, while 14 per cent say decrease funding. Five per cent are unsure. Green Party voters were the most likely to advise on increasing funding (58%), while Conservative Party voters were most likely to advise on decreasing funding (41%). These results are fairly consistent with the previous wave in 2015.

Independence of the CBC

- Almost two in five Canadians say the CBC's independence has decreased in the past four years Thirty-six per cent of Canadians say the CBC's independence as a broadcaster has decreased over the past four years (a slight decrease from 42% in 2015), while 32 per cent say it has stayed the same (36% in 2015), and 15 per cent say it has increased (11% in 2015). Seventeen per cent are unsure. Liberal Party voters were the least likely to say the CBC's independence has decreased (26%), and most likely to say it has increased (21%). Bloc Quebecois voters were the most likely to say it has decreased (62%).
- Over half of Canadians say the Prime Minister's power to appoint the CBC president and Board of Directors gives the government too much influence – A little over half of Canadians (54%) say that the Prime Minister's power to appoint the CBC President and Board of Directors gives the government too much influence, while 26 per cent say the CBC is independent and it doesn't matter who appoints the Board of Directors and President. Twenty per cent are unsure. Liberal Party voters were the least likely to say the PM appointing the President and Board gives too much influence (42%), while Conservative and Bloc Quebecois voters were the most likely to say this (68% and 66% respectively).

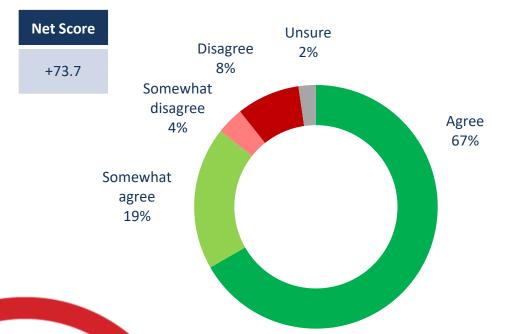
Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between May 12^{th} to 16^{th} , 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

The research was commissioned by Friends of Canadian Broadcasting.



Importance of the CBC

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 12th to 16th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Agree/ Somewhat agree
Male (n=503)	80.9%
Female (n=497)	90.4%
Liberal (n=367)	95.2%
Conservative (n=275)	65.6%
NDP (n=170)	94.5%
Bloc Quebecois (n=39)	90.5%
Green Party (n=58)	90.2%
Undecided (n=91)	88.2%

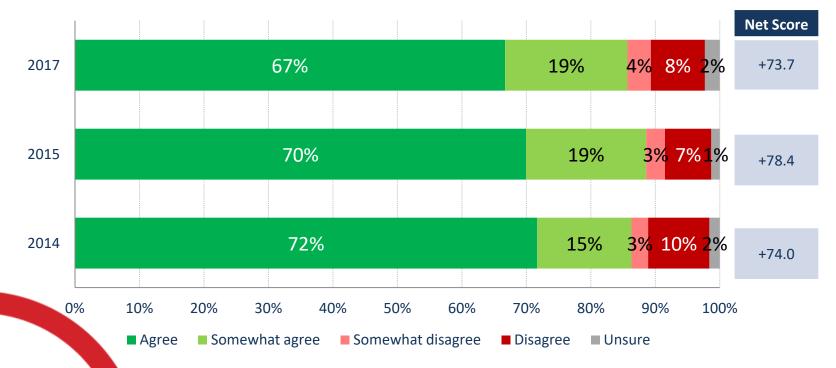
*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Now that virtually all private news media in Canada are owned by only a few large corporations it is more important than ever to have a strong and vibrant CBC

Importance of the CBC

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 12th to 16th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20. Source: Nanos Research, RDD dual frame random telephone survey, August 28th and September 3rd, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20. Source: Nanos Research, RDD dual frame random telephone survey, August 16th to 25th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



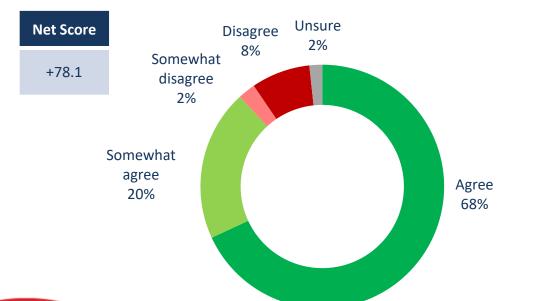
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QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Now that virtually all private news media in Canada are owned by only a few large corporations it is more important than ever to have a strong and vibrant CBC

The CBC's role in Canadian culture and identity

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 12th to 16th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Agree/ Somewhat agree
Male (n=503)	83.0%
Female (n=497)	93.0%
Liberal (n=367)	97.4%
Conservative (n=275)	68.8%
NDP (n=170)	94.7%
Bloc Quebecois (n=39)	88.6%
Green Party (n=58)	94.1%
Undecided (n=91)	93.2%

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

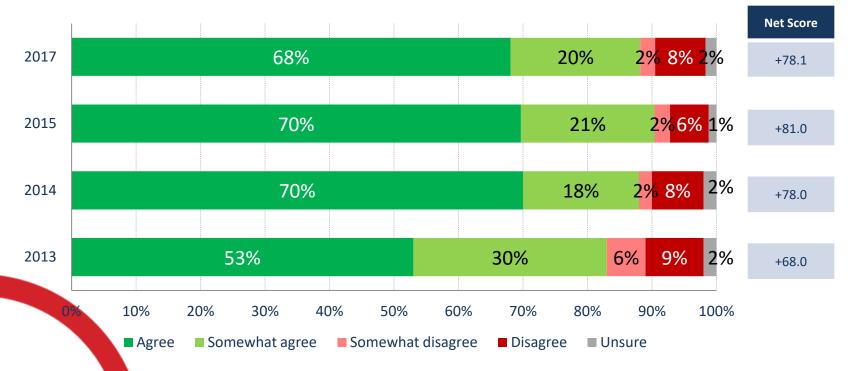
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

The CBC plays an important role in strengthening Canadian culture and identity

The CBC's role in Canadian culture and identity

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 12th to 16th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20. Source: Nanos Research, RDD dual frame random telephone survey, August 28th and September 3rd, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, RDD dual frame random telephone survey, August 16th to 25th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20. Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 16th to 19th, 2013, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



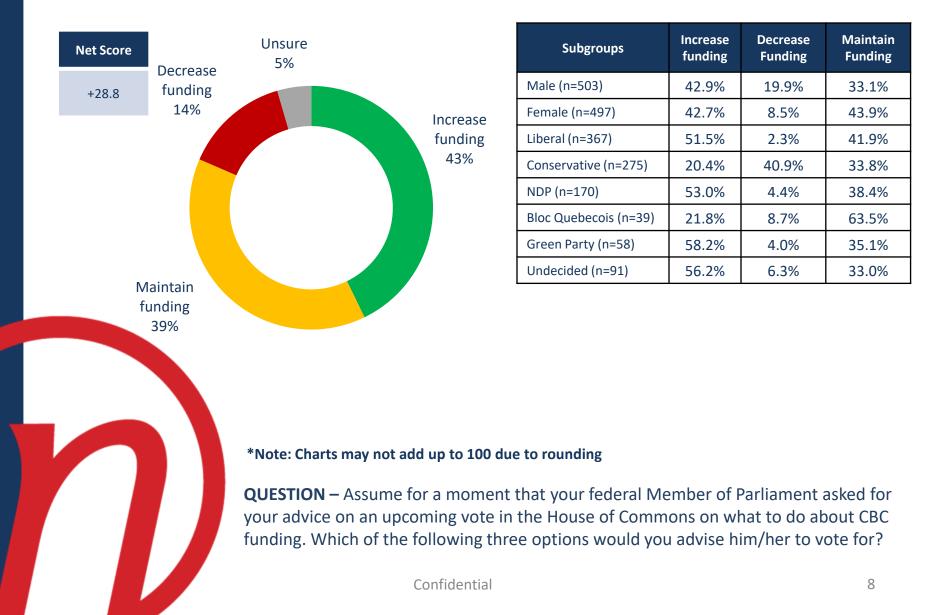
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QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

The CBC plays an important role in strengthening Canadian culture and identity

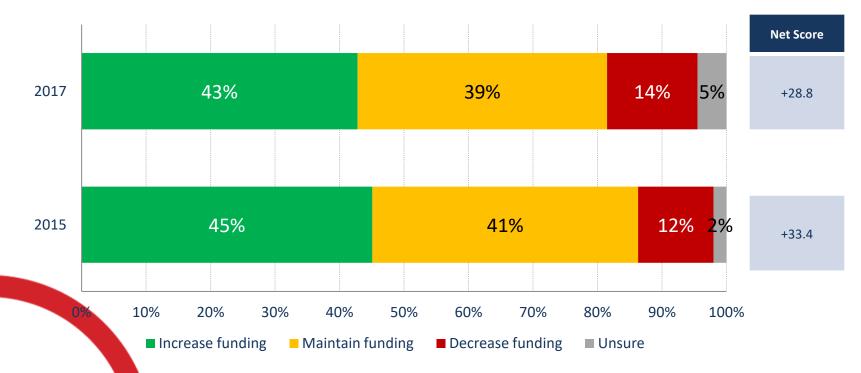
Funding the CBC

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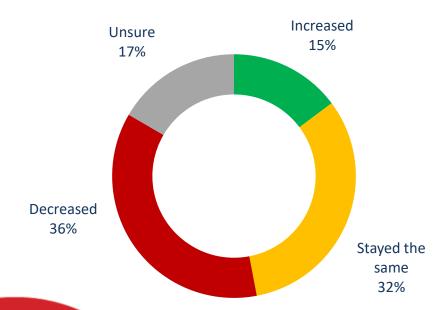


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QUESTION – Assume for a moment that your federal Member of Parliament asked for your advice on an upcoming vote in the House of Commons on what to do about CBC funding. Which of the following three options would you advise him/her to vote for?

CBC's Independence over past four years

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 12th to 16th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



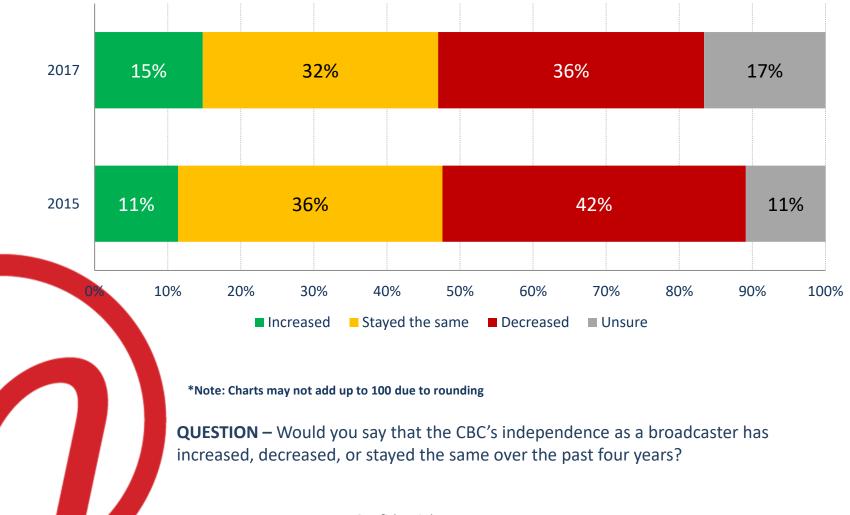
Subgroups	Increased	Decreased	Stayed the same
Male (n=503)	11.7%	38.4%	34.4%
Female (n=497)	17.8%	34.4%	30.2%
Liberal (n=367)	20.5%	26.3%	38.4%
Conservative (n=275)	13.0%	42.6%	26.7%
NDP (n=170)	11.5%	40.4%	32.5%
Bloc Quebecois (n=39)	-	61.5%	25.8%
Green Party (n=58)	10.4%	37.0%	29.3%
Undecided (n=91)	13.2%	39.3%	28.3%

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

QUESTION – Would you say that the CBC's independence as a broadcaster has increased, decreased, or stayed the same over the past four years?

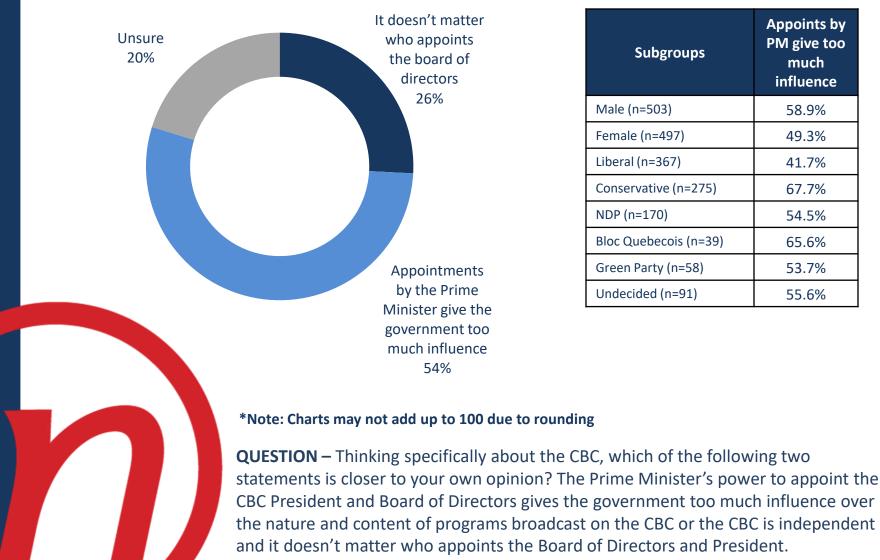
CBC's Independence over past four years

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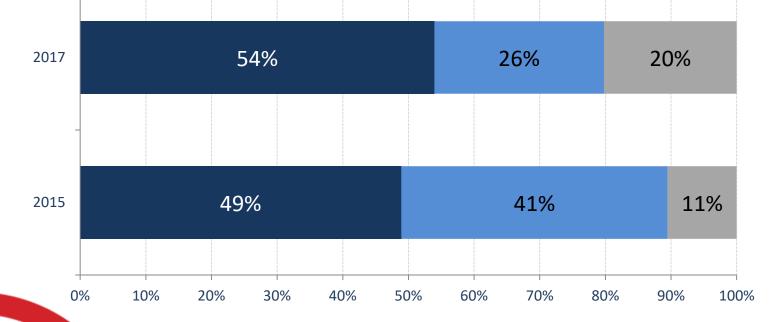
Appointing CBC Board of Directors

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 12th to 16th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Appointing CBC Board of Directors

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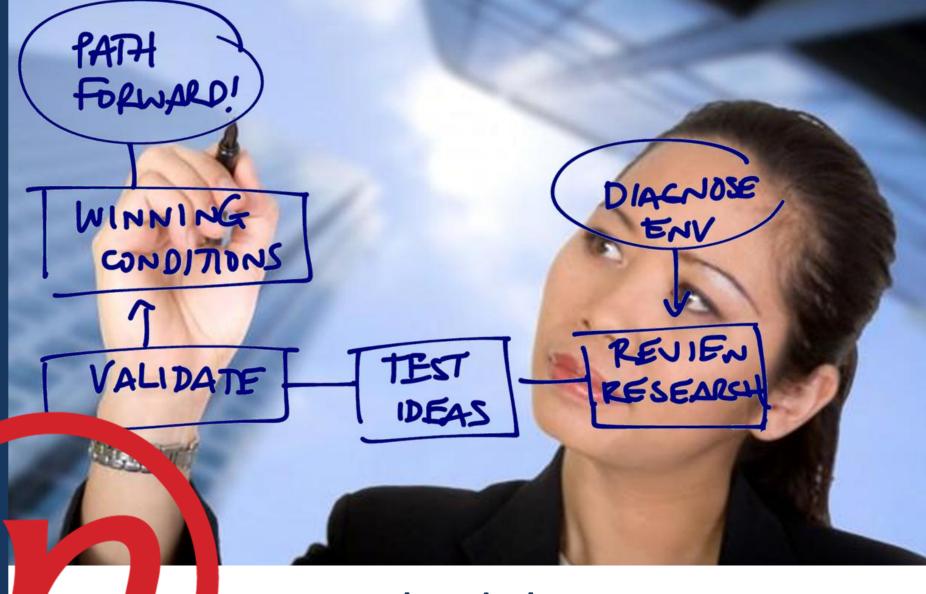


Appointments by the Prime Minister give the government too much influence
It doesn't matter who appoints the board of directors

Unsure

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QUESTION – Thinking specifically about the CBC, which of the following two statements is closer to your own opinion? The Prime Minister's power to appoint the CBC President and Board of Directors gives the government too much influence over the nature and content of programs broadcast on the CBC or the CBC is independent and it doesn't matter who appoints the Board of Directors and President.



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between May 12th to 16th, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

The research was commissioned by Friends of Canadian Broadcasting.

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



Other Research Cited

Nanos Research:

A Nanos Research RDD dual frame (land- and cell-lines) random telephone survey of 1,000 Canadians between August 28th and September 3rd, 2015. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada. Individuals randomly called using random digit dialling with a maximum of five call backs. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. The research was commissioned by Friends of Canadian Broadcasting in collaboration with ACTRA and UNIFOR.

A Nanos Research RDD dual frame (land- and cell-lines) random telephone survey of 1,000 Canadians between August 16th and 25th, 2014. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada. Individuals randomly called using random digit dialling with a maximum of five call backs. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. The research was commissioned by Friends of Canadian Broadcasting in collaboration with ACTRA and UNIFOR. http://www.friends.ca/files/PDF/nanos-what-canadians-think-about-tv.pdf

A National Nanos RDD random survey of 1,000 Canadians conducted between June 16th and 19th, 2013. This field period included two evenings when the Stanley Cup Finals were on television. Participants were randomly recruited by telephone and administered a survey online. The results were statistically checked and weighted using the latest Census data. The margin of error for a random survey of 1,000 Canadians is ±3.1%, 19 times out of 20.

https://www.friends.ca/files/PDF/2013-388-FCB-Report.pdf

Pollara:

An online survey conducted among Pollara's 100,000 member panel of Canadians 18 years of age and older. The representative sample consisted of 3,361 Canadians. Results are considered accurate to $\pm 1.69\%$ nineteen times out of twenty. No quotas were set, but upon completion of the survey, the data was weighted by age, gender and region to ensue that the results shown in this report are representative of the opinions of the Canadian general public. The survey was fielded from April 20th to April 24th, 2009. <u>http://www.friends.ca/poll/8288</u>

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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Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Friends of Canadian Broadcasting	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Final Sample Size	1,000 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online survey	Demographics	centines could not participate.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
		Estimated Response Rate	14 percent, consistent with industry norms.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Content	This is report one (1) of two (2), with report two to be released. This was module two of an omnibus survey. The preceding module included questions about top unprompted national issue of concern and voting preferences. This module included a mix of
Number of Calls	Maximum of five call backs.		questions about the CBC, local broadcasting, and news sources in Canada.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
	9:30pm local time for the respondent.	Survey Company	Nanos Research
Field Dates	May 12 th to 16 th , 2017.		Contact Nanos Research for more information or with any
Language of Survey	The survey was conducted in both English and French.	Contact	concerns or questions. <u>http://www.nanosresearch.com</u> Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.



Tabulations



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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

				Region						Gender					
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Now that virtually all private news media in	Total	Unwgt N	1000	100	250	300	200	150	503	497	174	171	206	216	233
Canada are owned by only a few large		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
corporations it is more important	Agree	%	66.7	84.5	69.9	62.3	54.8	74.5	60.5	72.7	67.0	65.5	60.8	64.1	73.4
than ever to have a strong and vibrant CBC	Somewhat agree	%	19.0	9.5	21.7	21.3	18.5	16.8	20.4	17.7	19.3	18.3	21.8	19.5	16.9
	Somewhat disagree	%	3.6	.9	2.2	4.2	6.6	2.2	3.9	3.2	4.0	4.1	4.7	2.2	3.0
	Disagree	%	8.4	4.3	4.3	9.8	17.5	3.1	13.3	3.8	6.4	9.0	11.3	11.4	5.4
	Unsure	%	2.3	.8	1.9	2.4	2.6	3.4	1.9	2.6	3.3	3.1	1.5	2.8	1.3



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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

					Regio	on			Gender						
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The CBC plays an important role in strengthening	Total	Unwgt N	1000	100	250	300	200	150	503	497	174	171	206	216	233
Canadian culture and identity		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Agree	%	68.1	76.4	70.7	68.6	56.6	72.5	63.3	72.6	68.4	58.8	64.4	67.7	76.4
	Somewhat agree	%	20.1	19.4	21.6	17.1	22.4	20.8	19.7	20.4	16.2	28.0	21.7	18.9	17.7
	Somewhat disagree	%	2.3	2.6	2.6	2.7	2.7	.6	3.1	1.6	4.2	1.5	4.5	1.7	.4
	Disagree	%	7.8	1.7	3.4	9.5	16.5	4.2	12.2	3.6	8.7	8.3	8.4	10.3	4.6
	Unsure	%	1.7	.0	1.7	2.1	1.9	1.9	1.7	1.7	2.5	3.4	.9	1.4	.9

					Regio	n			Ger	ıder	_	Age			
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Assume for a moment that your federal	Total	Unwgt N	1000	100	250	300	200	150	503	497	174	171	206	216	233
Member of Parliament asked for		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
your advice on an upcoming vote in the House of	Maintain funding	%	38.7	27.4	50.7	38.2	35.7	31.0	33.1	43.9	40.4	42.6	35.2	38.7	37.5
Commons on what to do about CBC funding. Which of	Increase funding	%	42.8	63.4	38.9	39.7	32.5	55.6	42.9	42.7	39.1	39.5	43.4	39.0	50.0
the following three options would you advise him/her to	Decrease funding	%	14.0	5.0	7.2	15.6	27.6	10.3	19.9	8.5	14.3	13.3	17.9	18.5	8.4
vote for?	Unsure	%	4.5	4.2	3.2	6.5	4.1	3.0	4.0	4.8	6.2	4.6	3.5	3.8	4.1

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					Regio	n			Ger	nder	_	Age				
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus	
Question - Would you say that the CBC's independence	Total	Unwgt N	1000	100	250	300	200	150	503	497	174	171	206	216	233	
as a broadcaster has increased,		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265	
decreased, or stayed the same over the	Increased	%	14.8	14.2	12.0	16.7	13.8	17.6	11.7	17.8	18.7	20.8	15.4	6.7	13.8	
past four years?	Decreased	%	36.4	26.0	33.8	39.4	35.7	42.3	38.4	34.4	32.4	26.7	40.7	37.9	41.0	
	Stayed the same	%	32.2	45.7	37.7	28.3	28.3	27.4	34.4	30.2	30.6	31.9	29.3	39.4	30.6	
	Unsure	%	16.6	14.1	16.5	15.6	22.2	12.7	15.6	17.5	18.3	20.7	14.6	15.9	14.6	

					Regio	'n			Gei	nder			Age		
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Thinking specifically about the CBC, which of the	Total	Unwgt N	1000	100	250	300	200	150	503	497	174	171	206	216	233
following two statements is closer		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
to your own opinion? [ROTATE]	The Prime Minister's power to appoint the CBC President and Board of Directors gives the government too much influence over the nature and content of programs broadcast on the CBC		53.9	48.5	53.0	52.3	60.0	54.4	58.9	49.3	49.8	54.5	55.3	60.0	51.4
	The CBC is independent and it doesn't matter who appoints the Board of Directors and President	%	25.8	27.8	33.9	26.0	18.2	20.7	24.8	26.8	30.0	23.0	22.3	23.7	28.4
	Unsure	%	20.2	23.7	13.1	21.7	21.8	25.0	16.3	24.0	20.2	22.5	22.4	16.3	20.2

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