

National Survey on Broadcasting Policy - Summary Report submitted to Bell Media by Nanos, March 2015

# Only 20 per cent of Canadians say ability to watch Super Bowl ads more important than supporting Canadian broadcasters who have paid for the broadcast rights 

A new Nanos survey for Bell Media suggests that Canadians by a margin of more than three to one would rather support Canadian broadcasters who have paid for the broadcast rights for the Super Bowl over the ability to watch U.S. commercials during the Super Bowl. To follow are the research highlights.

Support for CRTC Broadcasting Principles - At least nine of ten Canadians support or somewhat support a series of broadcasting principles including the promotion of local news, and having a policy which supports Canadian companies' ability to advertise to Canadians. These principles are on the CRTC website http://www.crtc.gc.ca/eng/INFO SHT/bdt10.htm

Broadcast Policy Approach - Canadians are more likely to believe that broadcasting policies should be applied consistently to everyone (64 per cent) compared to being able to make an exception (28 per cent).

Watching U.S. Super Bowl Commercials - Canadians believe it is more important to support Canadian broadcasters who have paid for broadcast rights (69 per cent) over the ability to watch U.S. Super Bowl commercials (20 per cent).

Awareness of Online Availability of Super Bowl Commercials - Sixty-two per cent of Canadians are aware that Super Bowl ads are available online before, during and after the game while 36 per cent are unaware.

How Many Complaints Merit a Policy Change - Twenty eight per cent of Canadians thought that if there were 500,000 or more complaints, the policy should be changed, followed by 19 per cent who said 100,000 complaints merited a policy change, 16 per cent who said 10,000 complaints, 11 per cent who said 1,000 complaints and, nine per cent who said100 complaints should trigger a policy change. Eighteen per cent of Canadians were unsure how many complaints would merit a policy change.

## Views on Broadcasting Policy

Source: Nanos Research, RDD dual frame (land + cell) telephone survey, February $24^{\text {th }}$, to March $1^{\text {st }}, 2015, \mathrm{n}=1,000$, accurate 3.1 percentage points plus or minus, 19 times out of 20 .

$■$ Agree $■$ Somewhat agree $■$ Somewhat disagree $■$ Disagree $■$ Unsure
*Note: Charts may not add up to 100 due to rounding

QUESTION - Do you agree, somewhat agree, somewhat disagree or disagree with the following principles. [Randomize Statements]

## Broadcasting Policy Approach <br> Source: Nanos Research, RDD dual frame (land + cell) telephone survey, February $24^{\text {th }}$, to March $1^{\text {st }}, 2015, \mathrm{n}=1,000$, accurate 3.1 percentage points plus or minus, 19 times out of 20 .

| Unsure 8\% | Subgroups | Ability to make an exception |
| :---: | :---: | :---: |
| Being able to | Atlantic ( $\mathrm{n}=100$ ) | 21.3\% |
| exception | Quebec ( $\mathrm{n}=250$ ) | 34.1\% |
| 28\% | Ontario ( $\mathrm{n}=300$ ) | 25.2\% |
|  | Prairies ( $\mathrm{n}=200$ ) | 25.5\% |
|  | British Columbia ( $\mathrm{n}=150$ ) | 31.6\% |
| Applying | Male ( $\mathrm{n}=497$ ) | 28.8\% |
| broadcasting policies | Female ( $\mathrm{n}=503$ ) | 27.3\% |
| consistently to | 18 to 29 ( $\mathrm{n}=205$ ) | 28.9\% |
| 64\% | 30 to 39 ( $\mathrm{n}=169$ ) | 22.2\% |
|  | 40 to 49 ( $\mathrm{n}=208$ ) | 33.6\% |
|  | 50 to 59 ( $\mathrm{n}=178$ ) | 24.8\% |
|  | 60 plus ( $\mathrm{n}=239$ ) | 29.0\% |

*Note: Charts may not add up to 100 due to rounding
QUESTION - Some people believe that it is acceptable for the government to make exceptions to broadcasting policies, while others think that broadcasting policies should be applied consistently to everyone. As a general rule what is more important [ROTATE], being able to make an exception or applying broadcasting policies consistently to everyone.

## Ability to watch U.S. commercials <br> Source: Nanos Research, RDD dual frame (land + cell) telephone survey, February $24^{\text {th }}$, to March $1^{\text {st }}, 2015, \mathrm{n}=1,000$, accurate 3.1 percentage points plus or minus, 19 times out of 20 .

|  | Subgroups | Ability to watch U.S. commercials |
| :---: | :---: | :---: |
|  | Atlantic ( $\mathrm{n}=100$ ) | 11.1\% |
|  | Quebec ( $\mathrm{n}=250$ ) | 18.4\% |
|  | Ontario ( $\mathrm{n}=300$ ) | 19.1\% |
|  | Prairies ( $\mathrm{n}=200$ ) | 24.2\% |
|  | British Columbia ( $\mathrm{n}=150$ ) | 23.8\% |
|  | Male ( $\mathrm{n}=497$ ) | 25.3\% |
|  | Female ( $\mathrm{n}=503$ ) | 14.5\% |
|  | 18 to 29 ( $\mathrm{n}=205$ ) | 21.8\% |
|  | 30 to 39 (n=169) | 28.2\% |
|  | 40 to 49 ( $\mathrm{n}=208$ ) | 19.6\% |
|  | 50 to 59 ( $\mathrm{n}=178$ ) | 20.8\% |
|  | 60 plus ( $\mathrm{n}=239$ ) | 11.8\% |

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

QUESTION - What is more important to you personally, your ability to watch U.S. commercials during the Super Bowl, or to support the Canadian broadcasters that have paid for the broadcast rights?

## Availability of Super Bowl Commercials <br> Source: Nanos Research, RDD dual frame (land + cell) telephone survey, February $24^{\text {th }}$, to March $1^{\text {st }}, 2015, \mathrm{n}=1,000$, accurate 3.1 percentage points plus or minus, 19 times out of 20 .



| Subgroups | Aware |
| :--- | :--- |
| Atlantic ( $n=100$ ) | $57.5 \%$ |
| Quebec ( $n=250$ ) | $59.2 \%$ |
| Ontario ( $n=300$ ) | $62.5 \%$ |
| Prairies ( $n=200$ ) | $68.4 \%$ |
| British Columbia (n=150) | $59.0 \%$ |
| Male (n=497) | $66.8 \%$ |
| Female (n=503) | $56.9 \%$ |
| 18 to $29(n=205)$ | $68.1 \%$ |
| 30 to $39(n=169)$ | $64.0 \%$ |
| 40 to $49(n=208)$ | $73.1 \%$ |
| 50 to $59(n=178)$ | $59.9 \%$ |
| 60 plus $(n=239)$ | $46.4 \%$ |

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

QUESTION - Are you aware or unaware that the Super Bowl commercials are available online before during and after the Super Bowl game?

## Ability to watch U.S. commercials <br> Source: Nanos Research, RDD dual frame (land + cell) telephone survey, February $24^{\text {th }}$, to March $1^{\text {st }}, 2015, \mathrm{n}=1,000$, accurate 3.1 percentage points plus or minus, 19 times out of 20.


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

QUESTION - Last year 8 million Canadians watched the Super Bowl on Canadian television stations and 100 Canadians complained to the CRTC about not being able to watch U.S. ads on the Canadian Super Bowl broadcast. What volume of complaints do you think warrants a change in policy in this context

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Methodology

## Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) random telephone survey, using live agents, of 1,000 Canadians between February 24th and March $1^{\text {st }}, 2015$. 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 $\pm 3.1$ percentage points, 19 times out of 20.

The research was commissioned by Bell Media.
Note: Charts may not add up to 100 due to rounding.

## 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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## Do you agree, somewhat agree, somewhat disagree or disagree with the following principles: [Randomize Questions 1-4]

|  |  | Question 1 - Our TV broadcasting policy should support Canadian companies' ability to advertise to Canadians |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | Agree | Somewhat agree | Somewhat disagree | Disagree | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 72.3 | 18.1 | 3.6 | 4.4 | 1.7 |
|  | Atlantic | 100 | 82.9 | 14.0 | . 7 | 1.6 | . 9 |
|  | Quebec | 250 | 73.3 | 14.6 | 3.7 | 6.1 | 2.3 |
|  | Ontario | 300 | 70.6 | 21.8 | 3.2 | 3.1 | 1.3 |
|  | Prairies | 200 | 68.4 | 19.3 | 4.3 | 6.1 | 2.0 |
|  | British Columbia | 150 | 72.0 | 17.3 | 4.9 | 4.1 | 1.7 |
| Gender | Male | 497 | 68.2 | 19.4 | 4.6 | 6.2 | 1.7 |
|  | Female | 503 | 76.3 | 16.7 | 2.6 | 2.7 | 1.7 |
| Age | 18 to 29 | 205 | 65.8 | 23.4 | 3.4 | 4.9 | 2.6 |
|  | 30 to 39 | 169 | 66.1 | 27.1 | 3.7 | 2.7 | . 5 |
|  | 40 to 49 | 208 | 76.8 | 16.3 | 3.8 | 1.5 | 1.6 |
|  | 50 to 59 | 178 | 73.6 | 13.5 | 4.4 | 5.9 | 2.6 |
|  | 60 plus | 239 | 77.2 | 12.1 | 2.8 | 6.8 | 1.1 |

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Do you agree, somewhat agree, somewhat disagree or disagree with the following principles: [Randomize Questions 1-4]

|  |  | Question 2 - Our TV broadcasting policy should help keep advertising dollars in the Canadian market |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | Agree | Somewhat agree | Somewhat disagree | Disagree | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 72.0 | 18.4 | 2.2 | 4.9 | 2.5 |
|  | Atlantic | 100 | 75.0 | 19.5 | 2.4 | . 8 | 2.4 |
|  | Quebec | 250 | 75.1 | 17.4 | 1.2 | 3.8 | 2.5 |
|  | Ontario | 300 | 71.3 | 18.6 | 1.2 | 6.8 | 2.2 |
|  | Prairies | 200 | 69.4 | 20.5 | 2.0 | 5.7 | 2.4 |
|  | British Columbia | 150 | 69.6 | 16.2 | 6.0 | 4.7 | 3.4 |
| Gender | Male | 497 | 71.4 | 16.3 | 2.7 | 7.2 | 2.4 |
|  | Female | 503 | 72.5 | 20.5 | 1.7 | 2.7 | 2.6 |
| Age | 18 to 29 | 205 | 65.7 | 22.9 | 1.1 | 6.4 | 3.8 |
|  | 30 to 39 | 169 | 66.8 | 23.6 | 4.7 | 2.1 | 2.8 |
|  | 40 to 49 | 208 | 71.2 | 17.9 | 2.8 | 5.9 | 2.2 |
|  | 50 to 59 | 178 | 76.7 | 15.5 | 2.2 | 4.6 | 1.1 |
|  | 60 plus | 239 | 78.3 | 13.4 | . 7 | 5.1 | 2.5 |

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Do you agree, somewhat agree, somewhat disagree or disagree with the following principles: [Randomize Questions 1-4]

|  |  | Question 3 - Our TV broadcasting policy should help promote the creation of local news and programming |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | Agree | Somewhat agree | Somewhat disagree | Disagree | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 79.9 | 14.4 | 2.4 | 2.5 | . 8 |
|  | Atlantic | 100 | 85.0 | 10.1 | 4.1 | . 0 | . 8 |
|  | Quebec | 250 | 83.2 | 13.2 | 1.2 | . 8 | 1.6 |
|  | Ontario | 300 | 78.0 | 14.9 | 2.7 | 4.0 | . 3 |
|  | Prairies | 200 | 78.1 | 17.0 | 1.8 | 2.4 | . 6 |
|  | British Columbia | 150 | 77.0 | 14.8 | 3.5 | 3.7 | 1.1 |
| Gender | Male | 497 | 78.6 | 13.1 | 3.2 | 4.1 | 1.0 |
|  | Female | 503 | 81.1 | 15.7 | 1.6 | . 8 | . 7 |
| Age | 18 to 29 | 205 | 81.2 | 15.0 | 1.9 | 1.9 | . 0 |
|  | 30 to 39 | 169 | 76.8 | 16.4 | 3.6 | 2.7 | . 5 |
|  | 40 to 49 | 208 | 79.6 | 16.6 | 2.2 | 1.0 | . 7 |
|  | 50 to 59 | 178 | 81.5 | 12.1 | 2.4 | 3.0 | 1.1 |
|  | 60 plus | 239 | 79.9 | 12.3 | 2.3 | 3.7 | 1.8 |

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Do you agree, somewhat agree, somewhat disagree or disagree with the following principles:
[Randomize Questions 1-4]

|  |  | Question 4 - Our TV broadcasting policy should help protect the rights of Canadian companies who pay to have exclusive broadcast rights in Canada for the programs they show on air |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | Agree | Somewhat agree | Somewhat disagree | Disagree | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 59.7 | 23.4 | 5.2 | 7.4 | 4.3 |
|  | Atlantic | 100 | 56.2 | 25.3 | 3.4 | 9.7 | 5.3 |
|  | Quebec | 250 | 66.5 | 20.0 | 4.1 | 7.3 | 2.1 |
|  | Ontario | 300 | 61.8 | 23.2 | 4.7 | 7.3 | 3.0 |
|  | Prairies | 200 | 51.2 | 25.2 | 8.4 | 7.5 | 7.7 |
|  | British Columbia | 150 | 57.9 | 26.1 | 4.7 | 6.1 | 5.2 |
| Gender | Male | 497 | 57.1 | 21.8 | 6.5 | 10.7 | 4.0 |
|  | Female | 503 | 62.3 | 25.1 | 3.9 | 4.1 | 4.6 |
| Age | 18 to 29 | 205 | 53.7 | 27.1 | 8.9 | 7.7 | 2.7 |
|  | 30 to 39 | 169 | 57.4 | 25.5 | 6.0 | 8.0 | 3.0 |
|  | 40 to 49 | 208 | 62.8 | 23.0 | 4.4 | 6.7 | 3.1 |
|  | 50 to 59 | 178 | 61.7 | 21.0 | 3.3 | 7.9 | 6.1 |
|  | 60 plus | 239 | 62.4 | 21.0 | 3.4 | 6.9 | 6.3 |

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|  |  | Question 5 - Some people believe that it is acceptable for the government to make exceptions to broadcasting policies, while others think that broadcasting policies should be applied consistently to everyone. As a general rule what is more important [ROTATE], being able to make an exception or applying broadcasting policies consistently to everyone. |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | It is acceptable for the government to make exceptions to broadcasting policies | Broadcasting policies should be applied consistently to everyone | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 28.1 | 63.8 | 8.1 |
|  | Atlantic | 100 | 21.3 | 70.3 | 8.4 |
|  | Quebec | 250 | 34.1 | 58.6 | 7.3 |
|  | Ontario | 300 | 25.2 | 68.3 | 6.5 |
|  | Prairies | 200 | 25.5 | 63.3 | 11.2 |
|  | British Columbia | 150 | 31.6 | 60.0 | 8.4 |
| Gender | Male | 497 | 28.8 | 63.6 | 7.5 |
|  | Female | 503 | 27.3 | 64.0 | 8.7 |
| Age | 18 to 29 | 205 | 28.9 | 64.5 | 6.6 |
|  | 30 to 39 | 169 | 22.2 | 66.9 | 10.9 |
|  | 40 to 49 | 208 | 33.6 | 60.2 | 6.2 |
|  | 50 to 59 | 178 | 24.8 | 69.3 | 5.9 |
|  | 60 plus | 239 | 29.0 | 60.2 | 10.8 |

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|  |  | Question 6 - What is more important to you personally, your ability to watch U.S. commercials during the Super Bowl, or to support the Canadian broadcasters that have paid for the broadcast rights? |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | Ability to watch US commercials | Support Canadian broadcasters | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 19.9 | 68.8 | 11.3 |
|  | Atlantic | 100 | 11.1 | 73.4 | 15.4 |
|  | Quebec | 250 | 18.4 | 72.6 | 9.0 |
|  | Ontario | 300 | 19.1 | 69.0 | 11.8 |
|  | Prairies | 200 | 24.2 | 65.1 | 10.7 |
|  | British Columbia | 150 | 23.8 | 63.9 | 12.3 |
| Gender | Male | 497 | 25.3 | 61.8 | 13.0 |
|  | Female | 503 | 14.5 | 75.8 | 9.7 |
| Age | 18 to 29 | 205 | 21.8 | 68.2 | 10.1 |
|  | 30 to 39 | 169 | 28.2 | 63.1 | 8.6 |
|  | 40 to 49 | 208 | 19.6 | 67.3 | 13.1 |
|  | 50 to 59 | 178 | 20.8 | 67.5 | 11.7 |
|  | 60 plus | 239 | 11.8 | 75.8 | 12.4 |

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|  |  | Question 7 - Are you aware or unaware that the Super Bowl commercials are available online before, during and after the Super Bowl game? |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | Aware | Unaware | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 61.8 | 35.6 | 2.6 |
|  | Atlantic | 100 | 57.5 | 41.0 | 1.4 |
|  | Quebec | 250 | 59.2 | 38.0 | 2.8 |
|  | Ontario | 300 | 62.5 | 33.8 | 3.7 |
|  | Prairies | 200 | 68.4 | 31.1 | . 5 |
|  | British Columbia | 150 | 59.0 | 37.6 | 3.4 |
| Gender | Male | 497 | 66.8 | 31.4 | 1.8 |
|  | Female | 503 | 56.9 | 39.8 | 3.4 |
| Age | 18 to 29 | 205 | 68.1 | 29.6 | 2.2 |
|  | 30 to 39 | 169 | 64.0 | 35.2 | . 8 |
|  | 40 to 49 | 208 | 73.1 | 24.5 | 2.4 |
|  | 50 to 59 | 178 | 59.9 | 38.2 | 1.9 |
|  | 60 plus | 239 | 46.4 | 48.9 | 4.7 |

National dual-frame random telephone survey of 1,000 Canadians conducted between February $24^{\text {th }}$ and March $1^{\text {st }}, 2015$ using live agents. The sample included both land and cell numbers. The margin of error for a survey of 1,000 Canadians is $\pm 3.1$ percentage points, 19 times out of 20 .

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|  |  | Question 8 - Last year 8 million Canadians watched the Super Bowl on Canadian television stations and 100 Canadians complained to the CRTC about not being able to watch U.S. ads on the Canadian Super Bowl broadcast. What volume of complaints do you think warrants a change in policy in this context |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Total | 100 | 1,000 | 10,000 | 100,000 | 500,000 | Unsure |
|  |  | Responses | Percentage | Percentage | Percentage | Percentage | Percentage | Percentage |
| Region | Canada 2015-02 | 1000 | 8.5 | 10.6 | 16.3 | 18.8 | 27.8 | 18.1 |
|  | Atlantic | 100 | 7.5 | 7.9 | 16.8 | 23.3 | 23.4 | 21.1 |
|  | Quebec | 250 | 11.4 | 10.2 | 20.3 | 13.4 | 26.0 | 18.8 |
|  | Ontario | 300 | 7.4 | 11.8 | 14.8 | 19.6 | 32.6 | 13.7 |
|  | Prairies | 200 | 8.9 | 11.0 | 14.0 | 22.8 | 23.3 | 20.1 |
|  | British Columbia | 150 | 5.9 | 9.9 | 15.6 | 17.5 | 30.0 | 21.0 |
| Gender | Male | 497 | 8.8 | 10.5 | 17.8 | 18.3 | 28.4 | 16.2 |
|  | Female | 503 | 8.2 | 10.6 | 14.9 | 19.2 | 27.2 | 20.0 |
| Age | 18 to 29 | 205 | 10.0 | 11.7 | 24.3 | 18.6 | 25.1 | 10.4 |
|  | 30 to 39 | 169 | 5.9 | 19.0 | 18.5 | 18.5 | 25.2 | 12.8 |
|  | 40 to 49 | 208 | 8.5 | 7.7 | 11.3 | 24.7 | 33.7 | 14.2 |
|  | 50 to 59 | 178 | 8.6 | 9.1 | 11.8 | 21.5 | 28.2 | 20.8 |
|  | 60 plus | 239 | 9.0 | 7.1 | 15.7 | 11.9 | 26.5 | 29.8 |

National dual-frame random telephone survey of 1,000 Canadians conducted between February $24^{\text {th }}$ and March $1^{\text {st }}, 2015$ using live agents. The sample included both land and cell numbers. The margin of error for a survey of 1,000 Canadians is $\pm 3.1$ percentage points, 19 times out of 20 .

