

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 <u>http://www.crtc.gc.ca/eng/INFO_SHT/bdt10.htm</u>

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 24th, to March 1st, 2015, 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 – Do you agree, somewhat agree, somewhat disagree or disagree with the following principles. [Randomize Statements]

Broadcasting Policy Approach

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



nake an aception
21.3%
34.1%
25.2%
25.5%
31.6%
28.8%
27.3%
28.9%
22.2%
33.6%
24.8%
29.0%

Ability to watch U.S. commercials

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

Ur	nsure	Ability to watch US	Subgroups	Ability to watch U.S. commercials
		commercials 20%	Atlantic (n=100)	11.1%
			Quebec (n=250)	18.4%
			Ontario (n=300)	19.1%
			Prairies (n=200)	24.2%
			British Columbia (n=150)	23.8%
			Male (n=497)	25.3%
			Female (n=503)	14.5%
Support			18 to 29 (n=205)	21.8%
Canadian broadcasters			30 to 39 (n=169)	28.2%
69%			40 to 49 (n=208)	19.6%
			50 to 59 (n=178)	20.8%
			60 plus (n=239)	11.8%
	*Note: Charts may QUESTION – U.S. commerci broadcasters th	y not add up to 100 due to roundin What is more important to ials during the Super Bowl hat have paid for the broad	you personally, your abil , or to support the Canad dcast rights?	ity to watch ian
				5

Availability of Super Bowl Commercials

Source: Nanos Research, RDD dual frame (land + cell) telephone survey, February 24th, to March 1st, 2015, 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

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





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



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 1st, 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 ± 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.





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.



View our brochure

Nik Nanos FMRIA

Chairman, Nanos Research Group Ottawa (613) 234-4666 ext. 237 Washington DC (202) 697-9924 nnanos@nanosresearch.com

Richard Jenkins

Vice President, Nanos Research Ottawa (613) 234-4666 ext. 230 rjenkins@nanosresearch.com

Tabulations

Confidential

0



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	



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



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 ee Somewhat agree 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



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



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



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



		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		



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