

Canadians' impressions on CBC funding and media regulation

National survey released May, 2016

Project 2016-832C

THE GLOBE AND MAIL 

 NANOS SURVEY



Canadians say CBC should be funded by tax dollars and advertising revenue – foreign investors should not be allowed to buy Canadian media companies

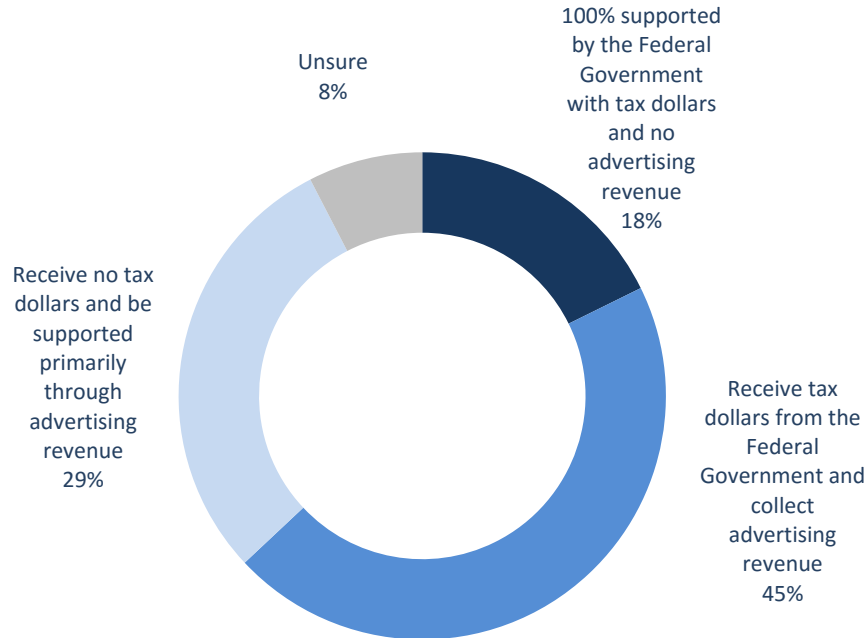
More Canadians prefer that the CBC be funded by both tax dollars and advertising revenue than have CBC be supported primarily through ad revenue or be supported entirely by the Federal Government. Most Canadians do not support the sale of Canadian media companies to foreign investors, nor do they support a tax on content purchased from foreign services, such as Netflix or iTunes. They are split on changing media regulations to protect Canadians content.

- **Support is strongest for funding CBC with tax dollars and advertising revenue** – Almost half of Canadians (45%) would prefer that the CBC receive tax dollars from the Federal Government and collect advertising revenue. Just under a third (29%) said they would prefer the CBC receive no tax dollars and be supported primarily through advertising revenue, while nearly a fifth (18%) would prefer that the CBC be 100% supported by the Federal Government with tax dollars and no advertising revenue. Eight percent were undecided.
- **Canadians say foreign investors should not be allowed to buy Canadian media companies** – Two thirds of Canadians either disagree (42%) or somewhat disagree (27%) that foreign investors should be allowed to buy Canadian media companies. Nearly three in ten Canadians somewhat agree (18%) or agree (nine percent) with this statement, while five percent are undecided.
- **Support is lacking for a tax on content purchased from foreign services** – Just over half of Canadians either disagree (42%) or somewhat disagree (13%) that the government should impose a sales tax when Canadians purchase entertainment from foreign services such as Netflix and iTunes. Two fifths say that they somewhat agree (21%) or agree (19%) with such a tax. Five percent of Canadians are undecided.
- **Canadians are split on changing media content rules** – Almost half of Canadians somewhat agree (30%) or agree (18%) that the government should change the current content rules to favour even more Canadian content. Nearly another half disagree (23%) or somewhat disagree (23%). The remaining six percent are undecided.

These observations are based on 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 April 28th to May 3rd, 2016 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

Future of the CBC

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, April 28th to May 3rd, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



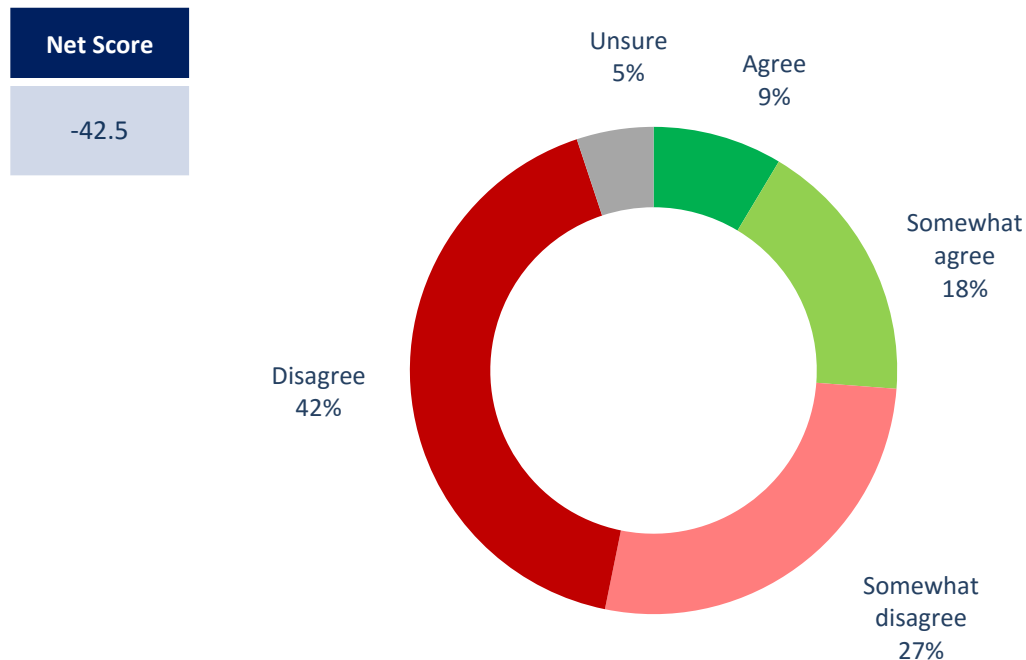
*Note: Charts may not add up to 100 due to rounding

Subgroups	Receive tax dollars from the Federal Government and collect advertising revenue
Atlantic (n=100)	48.7%
Quebec (n=250)	41.5%
Ontario (n=300)	48.6%
Prairies (n=200)	44.1%
British Columbia (n=150)	44.7%
Male (n=500)	42.7%
Female (n=500)	47.9%
18 to 29 (n=155)	41.8%
30 to 39 (n=156)	52.6%
40 to 49 (n=211)	46.9%
50 to 59 (n=240)	43.1%
60 plus (n=238)	43.5%

QUESTION – As you may know, the federal government is launching a review of broadcasting, culture and media policy in Canada. The CBC is Canada’s public broadcaster and receives more than \$1 billion in government support in addition to collecting advertising revenue. Thinking of the future, would you prefer that the CBC be [RANDOMIZE]

Allowing foreign investors to buy Canadian media companies

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, April 28th to May 3rd, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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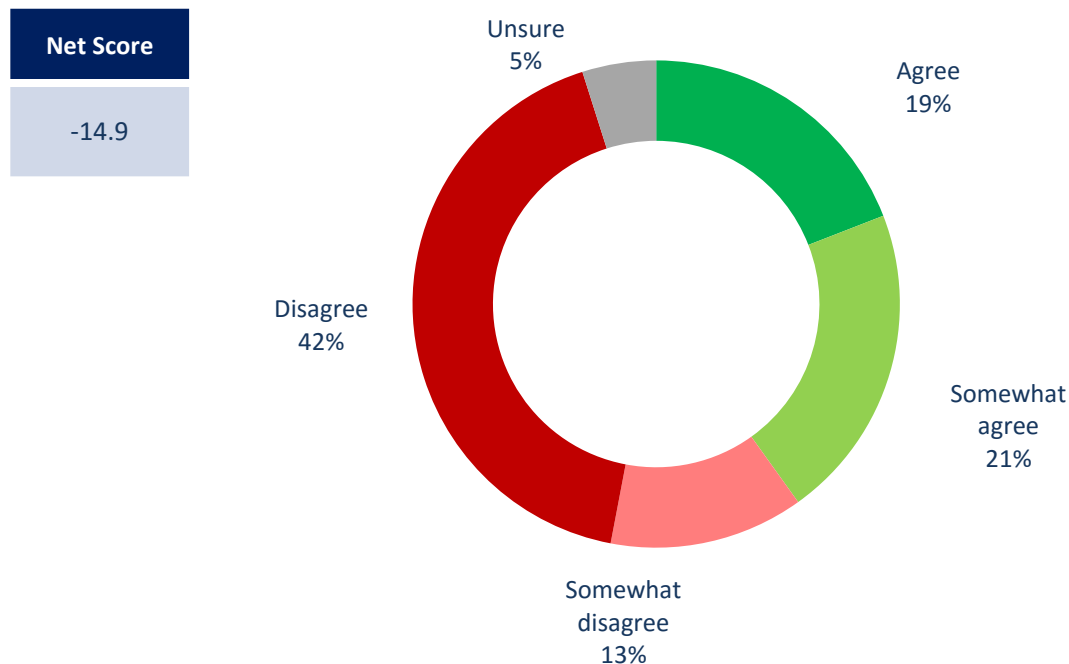
Subgroups	Disagree/ Somewhat disagree
Atlantic (n=100)	62.8%
Quebec (n=250)	70.1%
Ontario (n=300)	70.0%
Prairies (n=200)	61.1%
British Columbia (n=150)	78.1%
Male (n=500)	62.7%
Female (n=500)	74.8%
18 to 29 (n=155)	64.5%
30 to 39 (n=156)	63.8%
40 to 49 (n=211)	67.5%
50 to 59 (n=240)	73.3%
60 plus (n=238)	73.4%

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

Foreign investors should be allowed to buy Canadian media companies.

Imposing sales tax for purchases from Netflix and iTunes

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, April 28th to May 3rd, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

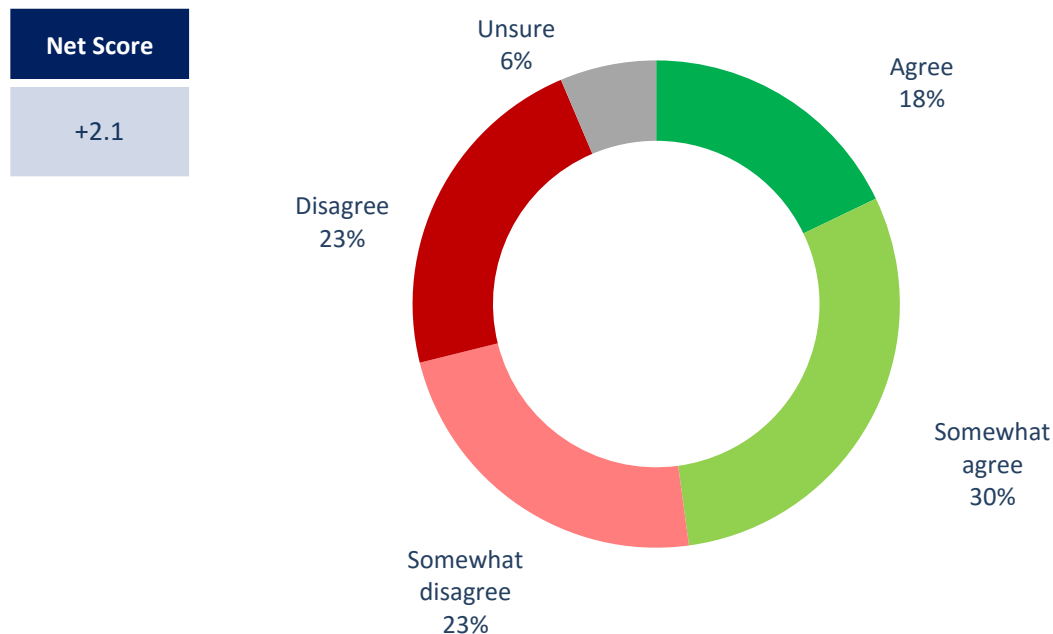
Subgroups	Disagree/ Somewhat disagree
Atlantic (n=100)	54.2%
Quebec (n=250)	52.1%
Ontario (n=300)	55.1%
Prairies (n=200)	61.9%
British Columbia (n=150)	51.2%
Male (n=500)	53.7%
Female (n=500)	56.4%
18 to 29 (n=155)	65.4%
30 to 39 (n=156)	58.2%
40 to 49 (n=211)	54.3%
50 to 59 (n=240)	53.6%
60 plus (n=238)	45.5%

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

The government should impose a sales tax when Canadians purchase entertainment from foreign services such as Netflix and iTunes?

Changing media content rules

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, April 28th to May 3rd, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	46.2%
Quebec (n=250)	57.8%
Ontario (n=300)	45.2%
Prairies (n=200)	41.0%
British Columbia (n=150)	46.8%
Male (n=500)	41.9%
Female (n=500)	53.9%
18 to 29 (n=155)	43.6%
30 to 39 (n=156)	43.7%
40 to 49 (n=211)	51.8%
50 to 59 (n=240)	52.5%
60 plus (n=238)	47.7%

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

The government should change the current content rules to favour even more Canadian content in the media.



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 April 28th to May 3rd, 2016 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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 data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.

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

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Globe and Mail	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 line could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	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.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	Twelve 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.
Demographics (Other)	Age, gender, education, income	Question Content	This was module four of an omnibus survey. The modules preceding these questions included top unprompted national issues of concern, vote preferences, the monarchy and interest in the leadership races of the NDP and Conservatives.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Number of Calls/	Maximum of five call backs.	Survey Company	Nanos Research
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Field Dates	April 28 th to May 3 rd , 2016.		
Language of Survey	The survey was conducted in both English and French.		

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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			Region						Gender		Age				
			Canada 2016-04	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - As you may know, the federal government is launching a review of broadcasting, culture and media policy in Canada. The CBC is Canada's public broadcaster and receives more than \$1 billion in government support in addition to collecting advertising revenue. Thinking of the future, would you prefer that the CBC be [RANDOMIZE]	Total	Unwgt N	1000	100	250	300	200	150	500	500	155	156	211	240	238
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	100% supported by the Federal Government with tax dollars and no advertising revenue	%	17.7	20.6	17.7	16.7	10.4	27.5	19.8	15.5	18.9	11.6	19.2	15.1	21.6
	Receive tax dollars from the Federal Government and collect advertising revenue	%	45.3	48.7	41.5	48.6	44.1	44.7	42.7	47.9	41.8	52.6	46.9	43.1	43.5
	Receive no tax dollars and be supported primarily through advertising revenue	%	29.4	23.5	28.7	31.2	38.2	19.4	32.1	26.7	32.3	25.4	27.9	33.4	28.1
	Unsure	%	7.6	7.2	12.2	3.6	7.4	8.5	5.3	9.9	7.1	10.4	6.0	8.4	6.8

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

			Region						Gender		Age				
			Canada 2016-04	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Foreign investors should be allowed to buy Canadian media companies.	Total	Unwgt N	1000	100	250	300	200	150	500	500	155	156	211	240	238
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Agree	%	8.6	9.3	9.5	8.4	9.5	5.6	11.5	5.6	10.7	10.7	9.5	5.3	6.8
	Somewhat agree	%	17.6	18.4	12.7	20.0	23.7	12.2	22.0	13.1	18.5	20.1	16.3	17.9	15.8
	Somewhat disagree	%	27.0	27.5	27.1	24.0	30.1	28.6	27.1	27.0	22.9	28.5	24.4	30.6	29.1
	Disagree	%	41.7	35.3	43.0	46.0	31.0	49.5	35.6	47.8	41.6	35.3	43.1	42.7	44.3
	Unsure	%	5.1	9.5	7.7	1.6	5.8	4.1	3.9	6.4	6.2	5.4	6.6	3.4	4.0

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Question - The government should impose a sales tax when Canadians purchase entertainment from foreign services such as Netflix and iTunes?	Total	Unwgt N	1000	100	250	300	200	150	500	500	155	156	211	240	238
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Agree	%	19.1	18.6	22.9	19.6	14.5	17.9	21.7	16.5	13.2	17.8	20.2	16.7	25.7
	Somewhat agree	%	21.0	23.2	21.1	20.0	18.0	25.3	20.3	21.7	16.0	18.8	21.5	25.4	23.0
	Somewhat disagree	%	12.9	12.6	13.7	13.7	13.3	9.8	12.5	13.4	14.3	11.9	12.9	11.1	13.8
	Disagree	%	42.1	41.6	38.4	41.4	48.6	41.4	41.2	43.0	51.1	46.3	41.4	42.5	31.7
	Unsure	%	4.9	4.0	3.9	5.3	5.7	5.5	4.4	5.5	5.4	5.1	4.0	4.4	5.7

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 April 28th to May 3rd, 2016. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

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Question - The government should change the current content rules to favour even more Canadian content in the media	Total	Unwgt N	1000	100	250	300	200	150	500	500	155	156	211	240	238
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Agree	%	17.9	21.8	23.9	16.2	12.2	16.1	17.9	17.9	22.5	14.6	15.7	17.7	18.3
	Somewhat agree	%	30.0	24.4	33.9	29.0	28.8	30.7	24.0	36.0	21.1	29.1	36.1	34.8	29.4
	Somewhat disagree	%	23.3	20.2	15.2	26.3	28.0	26.7	26.4	20.2	25.6	25.6	19.0	20.2	25.8
	Disagree	%	22.5	26.2	21.3	21.8	22.6	22.9	26.0	18.9	21.5	22.0	24.5	19.6	23.9
	Unsure	%	6.4	7.3	5.7	6.7	8.4	3.5	5.7	7.0	9.3	8.8	4.7	7.7	2.6

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 April 28th to May 3rd, 2016. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

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