Majority of Canadians support the Government of Canada encouraging Google and Facebook to negotiate with Canadian news organizations for the fair payment of their work – Over four in five are not confident that Google or Facebook work in the best interests of Canadians.

National Survey | Summary Conducted by Nanos for the Canadian Association of Broadcasters, November 2022 Submission 2022-2255



## **Key Findings**



Majority of Canadians support encouraging Google and Facebook to negotiate with Canadian news organizations for fair payment

About four in five Canadians support (52%) or somewhat support (25%) having the Government of Canada encourage Google and Facebook to negotiate with Canadian news organizations for the fair payment reflecting the value of their work, while four in five oppose (60%) or somewhat oppose (20%) Google and Facebook paying nothing to Canadian news organizations for the value of their news content.



Canadians show more confidence in Canadian news organizations rather than Facebook or Google working in the best interests of Canadians

Close to two in three Canadians are confident (<u>17%</u>) or somewhat (<u>46%</u>) confident that Canadian news organizations, including broadcasters and newspapers, work in the best interests of Canadians, while over four in five each say they are not confident or somewhat confident in Google (<u>57%</u> not confident, <u>25%</u> somewhat not confident) as well as Facebook (<u>71%</u> not confident, <u>20%</u> somewhat not confident).



### Access to news from Canadian sources important to majority of Canadians

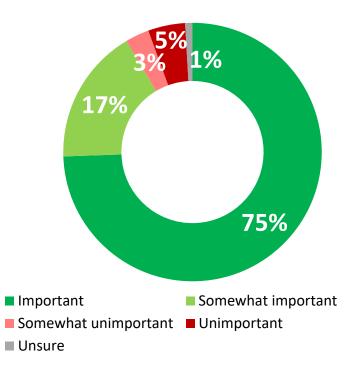
Nine in ten Canadians say the ability to access local, regional, national and international news from Canadian news sources is important (75%) or somewhat important (17%) to them. Older residents (55 plus) (84% important, 11% somewhat important) are more likely to say so compared to younger Canadians (18 to 34) (62% important, 26% somewhat important).





## Importance of accessing news from Canadian news sources

Q – Is being able to access local, regional, national and international news from Canadian news sources important, somewhat important, somewhat unimportant or unimportant to you?



## 9 in 10 Canadians

say being able to access local, regional, national and international news from Canadian news sources is important or somewhat important to them.





### Importance of accessing news from Canadian news sources by demographics

Q – Is being able to access local, regional, national and international news from Canadian news sources important, somewhat important, somewhat unimportant or unimportant to you?

	Impo	ortant/ Somewhat importan	t	
Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
94.6%	92.0%	91.6%	88.9%	91.8%
Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
89.1%	93.7%	88.4%	89.4%	95.0%
	Unimpo	ortant/ Somewhat unimport	tant	
Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
5.4%	6.0%	8.2%	10.2%	6.7%
Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
10.1%	5.2%	10.2%	9.2%	4.8%



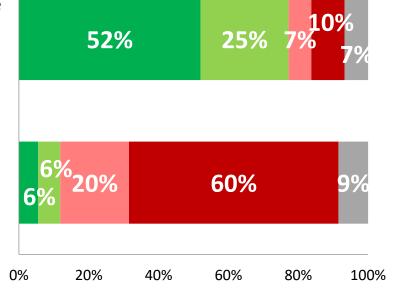


# Support for initiatives about large internet platforms

Canadians are <u>over six times more likely</u> to support or somewhat support having the Government of Canada encourage Google and Facebook to negotiate with Canadian news organizations for the <u>fair payment reflecting the value of</u> <u>their work</u> rather than Google and Facebook paying nothing to Canadian news organizations for the value of their news content

Q – As you may know, large foreign internet platforms like Google and Facebook are taking a large percentage of Canadian advertising dollars by collecting users' search and browsing activities and selling targeted advertising against that data. This includes searches and links to news content. Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE] Having the Government of Canada encourage Google and Facebook negotiate with Canadian news organizations for the fair payment reflecting the value of their work

Google and Facebook paying nothing to Canadian news organizations for the value of their news content



Support

Somewhat support

Somewhat oppose

Oppose

Unsure

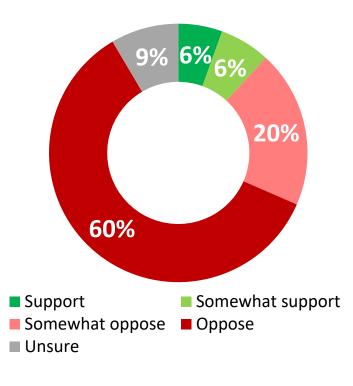




### Support for Google and Facebook paying nothing to Canadian news organizations

Q – As you may know, large foreign internet platforms like Google and Facebook are taking a large percentage of Canadian advertising dollars by collecting users' search and browsing activities and selling targeted advertising against that data. This includes searches and links to news content. Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

Google and Facebook paying nothing to Canadian news organizations for the value of their news content



pose	Atlantic	Quebec	Ontario	Prairies	BC
	(n=100)	(n=233)	(n=372)	(n=233)	(n=146)
ewhat op	82.0%	83.4%	79.4%	71.9%	82.9%
Oppose/Somewhat oppose	Men	Women	18 to 34	35 to 54	55 plus
	(n=568)	(n=516)	(n=184)	(n=409)	(n=491)
Oppo	77.5%	81.7%	73.8%	76.5%	85.9%

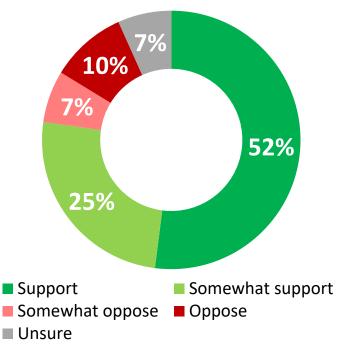




### Support for Having the Government of Canada encourage Google and Facebook negotiate with Canadian news organizations

Q – As you may know, large foreign internet platforms like Google and Facebook are taking a large percentage of Canadian advertising dollars by collecting users' search and browsing activities and selling targeted advertising against that data. This includes searches and links to news content. Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

Having the Government of Canada encourage Google and Facebook negotiate with Canadian news organizations for the fair payment reflecting the value of their work



support	Atlantic	Quebec	Ontario	Prairies	BC
	(n=100)	(n=233)	(n=372)	(n=233)	(n=146)
what su	78.1%	81.1%	76.2%	73.8%	77.5%
Support/Somewhat	Men	Women	18 to 34	35 to 54	55 plus
	(n=568)	(n=516)	(n=184)	(n=409)	(n=491)
Supp	76.7%	77.7%	68.2%	75.1%	84.7%





### **Confidence that organizations work in the best interests of Canadians**

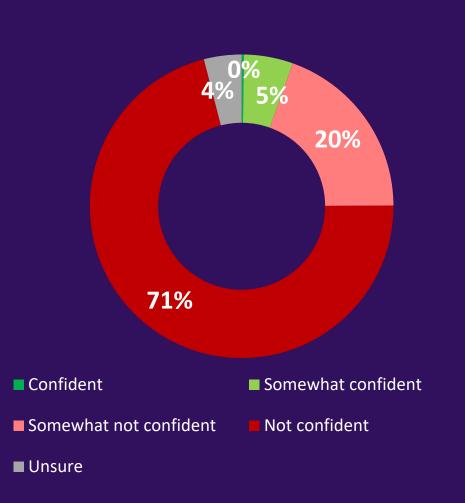
Canadians are <u>much more likely to</u> <u>be confident or somewhat</u> <u>confident that</u> Canadian news organizations, including broadcasters and newspapers, work in the best interests of Canadians with over six in ten that say so, while <u>over four in five each</u> <u>say they are not confident or</u> <u>somewhat confident in Google or</u> Facebook. © NANOS RESEARCH

That Canadian news organizations, including 19% 17% 46% 17% broadcasters and newspapers, work in the best interests of Canadians That Google works in the best of interests of 25% 57% 12% 69 Canadians That Facebook works in the best interests of 71% 20% Canadians 0% 20% 40% 60% 80% 100%

Confident Somewhat confident Somewhat not confident Not confident Unsure







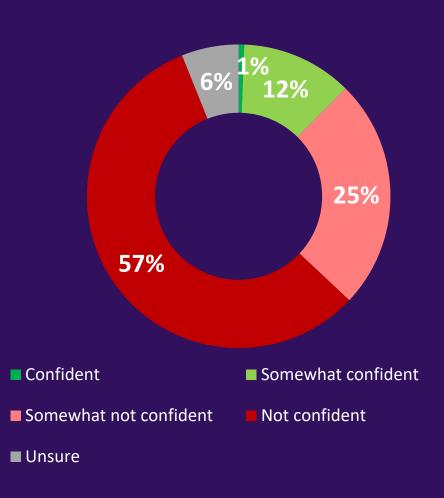
# **Confidence that Facebook works in the best interests of Canadians**

/hat	Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
lent/Somew confident 	5.4%	8.0%	5.2%	4.6%	3.0%
Confident/Somewhat confident 	Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
Co	5.7%	5.3%	5.7%	5.3%	5.5%
ewhat	Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
t/Som ifident	91.6%	88.2%	89.4%	90.6%	97.0%
Not confident/Somewhat not confident I	Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
Not (	91.0%	90.1%	91.9%	90.4%	89.8%

Q – Are you confident, somewhat confident, somewhat not confident or not confident in the following: [RANDOMIZE]

That Facebook works in the best interests of Canadians





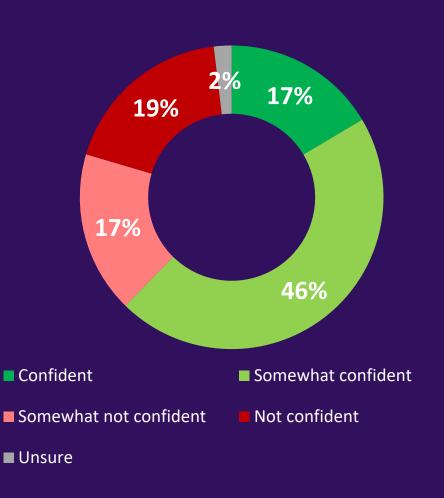
# Confidence that Google works in the best interests of Canadians

vhat	Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
Somew dent	8.9%	15.2%	11.7%	13.2%	10.8%
Confident/Somewhat confident	Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
ပိ	12.5%	12.4%	14.8%	14.2%	9.6%
iewhat t	Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
t/Som Ifiden	82.6%	75.9%	82.7%	80.7%	87.6%
Not confident/Somewhat not confident	Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
Not	82.8%	80.2%	78.8%	80.3%	84.1%
			1-15		

Q – Are you confident, somewhat confident, somewhat not confident or not confident in the following: [RANDOMIZE]

That Google works in the best interests of Canadians





### **Confidence that news organizations work in the best interests of Canadians**

vhat	Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
Somev dent	62.1%	71.8%	60.9%	50.1%	66.1%
Confident/Somewhat confident	Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
Ŝ	59.2%	65.3%	51.9%	59.1%	71.6%
ewhat	Atlantic (n=100)	Quebec (n=233)	Ontario (n=372)	Prairies (n=233)	BC (n=146)
t/Som ifident	35.0%	25.2%	37.4%	48.2%	33.4%
Not confident/Somewhat not confident	Men (n=568)	Women (n=516)	18 to 34 (n=184)	35 to 54 (n=409)	55 plus (n=491)
Not	39.4%	32.3%	44.8%	39.1%	27.3%

Q - Are you confident, somewhat confident, somewhat not confident or not<br/>confident in the following: [RANDOMIZE]Source: Nanos Research, RDD dual frame hybrid telephone and<br/>online random survey, October 30<sup>th</sup> to November 4<sup>th</sup>, 2022,<br/>n=1084, accurate 3.0 percentage points plus or minus, 19 times<br/>out of 20.



## PATH FURWARD!

### VALIDATE

TEST IDEAS

Nanos conducted an RDD dual frame (land- and celllines) hybrid telephone and online random survey of 1,084 Canadians, 18 years of age or older, between October 30<sup>th</sup> to November 4<sup>th</sup>, 2022, 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 dialing with a maximum of five call backs.

The margin of error for a random survey of 1,084 Canadians is  $\pm$ 3.0 percentage points, 19 times out of 20.

The research was commissioned by the Canadian Association of Broadcasters and was conducted by Nanos Research.

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

Element	Description	Element	Description
Research sponsor	Canadian Association of Broadcasters	Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting
Population and Final Sample Size	1084 Randomly selected individuals.		disclosure.
Source of Sample	Nanos Probability Panel	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
Type of Sample	Probability		data.
Margin of Error	$\pm 3.0$ percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Demographics	nnes, and individuals without internet access 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 (2021) 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.
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.	Estimated Response Rate	14 percent, consistent with industry norms.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Number of Calls	Maximum of five call backs to those recruited.		Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, views on charitable donation
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Question Content	habits, financial aid to Ukraine, increasing food prices, the enaction of the Emergency Act, international relations, and the health of the Canadian democracy.
Field Dates	October 30 <sup>th</sup> to November 4 <sup>th</sup> , 2022.	Question Wording	The questions in the preceding report are written exactly as they were
Language of Survey	The survey was conducted in both English and French.		asked to individuals.
	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies	Research/Data Collection Supplier	Nanos Research
Standards	with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. <u>https://canadianresearchinsightscouncil.ca/standards/</u>	Contact	Contact Nanos Research for more information or with any concerns or questions. <u>http://www.nanos.co</u> Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.



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## Any questions?



Nanos Research

(613) 234-4666, ext. 237

ea@nanosresearch.com

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Since







#### 2022-2255 - Canadian Association of Broadcasters - October Omni - STAT SHEET

					Re	gion			Ge	ender		Age	
			Canada					British			18 to	35 ot	55
			2022-10	Atlantic	Quebec	Ontario	Prairies	Columbia	Male	Female	34	54	plus
Question – Our next few questions are about news in Canada. Is being able to access local, regional, national and international news from Canadian news sources important, somewhat	Total	Unwgt N	1084	100	233	372	233	146	568	516	184	409	491
		Wgt N	1000	67	231	388	175	139	490	510	267	322	411
	Important	%	74.5	82.6	70.5	76.6	69.0	78.2	69.9	78.8	62.1	72.4	84.1
important, somewhat unimportant or unimportant to you?	Somewhat important	%	17.0	12.1	21.5	15.1	20.0	13.5	19.2	14.9	26.3	17.1	10.9
	Somewhat unimportant	%	3.0	2.2	3.4	3.2	4.0	0.9	3.7	2.3	2.7	4.0	2.4
	Unimportant	%	4.6	3.1	2.6	5.0	6.2	5.7	6.4	3.0	7.5	5.2	2.4
	Unsure	%	0.9	0.0	2.0	0.2	0.8	1.6	0.8	1.1	1.4	1.4	0.2

As you may know, large foreign internet platforms like Google and Facebook are taking a large percentage of Canadian advertising dollars by collecting users' search and browsing activities and selling targeted advertising against that data. This includes searches and links to news content. Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

					Re	gion			Ge	ender		Age	
			Canada 2022-10	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 ot 54	55 plus
uestion – Google and Facebook wing nothing to Canadian news ganizations for the value of their ws content	Total	Unwgt N	1084	100	233	372	233	146	568	516	184	409	491
		Wgt N	1000	67	231	388	175	139	490	510	267	322	411
news content	Support	%	5.5	5.2	1.8	5.8	9.5	5.8	6.8	4.3	8.2	7.0	2.6
ews content	Somewhat support	%	6.3	6.1	4.4	6.3	10.9	3.9	8.4	4.3	6.9	7.6	5.0
	Somewhat oppose	%	19.7	9.0	24.9	19.8	14.8	21.9	18.1	21.2	21.9	20.8	17.4
	Oppose	%	60.0	73.0	58.5	59.6	57.0	61.0	59.4	60.5	51.9	55.8	68.5
	Unsure	%	8.5	6.7	10.3	8.5	7.7	7.5	7.3	9.6	11.1	8.8	6.6

As you may know, large foreign internet platforms like Google and Facebook are taking a large percentage of Canadian advertising dollars by collecting users' search and browsing activities and selling targeted advertising against that data. This includes searches and links to news content. Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

					Re	gion			Ge	ender		Age	
			Canada 2022-10	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 ot 54	55 plus
Question – Having the Government of anada encourage Google and acebook pegotiate with Capadian	Total	Unwgt N	1084	100	233	372	233	146	568	516	184	409	491
Facebook negotiate with Canadian		Wgt N	1000	67	231	388	175	139	490	510	267	322	411
		Mean	6.8	6.3	7.3	6.5	7.5	5.8	5.4	8.0	10.0	7.4	4.2
work		Median	1.0	1.0	2.0	1.0	2.0	1.0	1.0	1.0	2.0	2.0	1.0
	Support	%	52.0	53.5	49.2	53.3	48.9	56.2	53.7	50.4	41.1	49.4	61.2
news organizations for the fair payment reflecting the value of their work	Somewhat support	%	25.2	24.6	31.9	22.9	24.9	21.3	23.0	27.3	27.2	25.7	23.5
	Somewhat oppose	%	6.5	3.9	5.5	6.8	6.7	8.4	8.0	5.1	7.2	7.2	5.5
	Oppose	%	9.6	11.9	5.9	10.6	11.9	8.6	10.4	8.8	13.9	10.3	6.3
	Unsure	%	6.7	6.0	7.4	6.4	7.6	5.4	4.9	8.4	10.7	7.5	3.5

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,084 Canadians, 18 years of age or older, between October 30<sup>th</sup> and November 4<sup>th</sup>, 2022. The margin of error for this survey is ±3.0 percentage points, 19 times out of 20.

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#### 2022-2255 - Canadian Association of Broadcasters - October Omni - STAT SHEET

Are you confident, somewhat confident, somewhat not confident or not confident in the following: [RANDOMIZE]

					Re	gion			Ge	ender		Age	
			Canada 2022-10	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 ot 54	55 plus
Question – That Facebook works in the best interests of	Total	Unwgt N	1084	100	233	372	233	146	568	516	184	409	491
Canadians		Wgt N	1000	67	231	388	175	139	490	510	267	322	411
	Confident	%	0.2	0.5	0.3	0.0	0.0	1.0	0.3	0.2	0.0	0.8	0.0
	Somewhat confident	%	5.2	4.9	7.7	5.2	4.6	2.0	5.4	5.1	5.7	4.6	5.5
	Somewhat not confident	%	19.5	17.2	25.6	16.8	22.1	14.3	15.2	23.5	17.3	18.3	21.7
	Not confident	%	71.1	74.4	62.5	72.6	68.5	82.7	75.7	66.6	74.5	72.1	68.0
	Unsure	%	4.0	3.0	3.8	5.4	4.8	0.0	3.3	4.6	2.5	4.3	4.8

Are you confident, somewhat confident, somewhat not confident or not confident in the following: [RANDOMIZE]

					Re	gion			Ge	ender		Age	
			Canada 2022-10	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 ot 54	55 plus
Question – That Google works in the best of interests of	Total	Unwgt N	1084	100	233	372	233	146	568	516	184	409	491
Canadians		Wgt N	1000	67	231	388	175	139	490	510	267	322	411
	Confident	%	0.6	0.5	0.9	0.3	0.6	1.0	0.8	0.4	0.5	1.1	0.3
	Somewhat confident	%	11.9	8.4	14.3	11.4	12.6	9.9	11.7	12.0	14.3	13.1	9.3
	Somewhat not confident	%	24.6	29.2	25.9	23.6	24.5	22.9	23.2	25.8	21.1	25.7	25.9
	Not confident	%	56.9	53.4	50.1	59.1	56.2	64.7	59.6	54.3	57.7	54.6	58.2
	Unsure	%	6.1	8.5	8.9	5.6	6.1	1.6	4.7	7.4	6.4	5.5	6.3

Are you confident, somewhat confident, somewhat not confident or not confident in the following: [RANDOMIZE]

			Region						Ge	ender	Age		
			Canada 2022-10	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 ot 54	55 plus
Question – That Canadian news organizations, including broadcasters and newspapers, work in the best interests of Canadians	Total	Unwgt N	1084	100	233	372	233	146	568	516	184	409	491
		Wgt N	1000	67	231	388	175	139	490	510	267	322	411
	Confident	%	16.5	17.0	22.1	13.9	13.5	17.8	17.3	15.6	10.8	15.3	21.0
	Somewhat confident	%	45.9	45.1	49.7	47.1	36.5	48.4	41.9	49.7	41.1	43.8	50.6
	Somewhat not confident	%	17.2	13.0	14.8	18.0	20.7	16.6	17.2	17.2	18.4	19.7	14.5
	Not confident	%	18.5	22.0	10.4	19.4	27.5	16.8	22.2	15.1	26.3	19.5	12.8
	Unsure	%	1.9	2.9	3.0	1.6	1.7	0.5	1.4	2.4	3.3	1.8	1.1

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Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,084 Canadians, 18 years of age or older, between October 30<sup>th</sup> and November 4<sup>th</sup>, 2022. The margin of error for this survey is ±3.0 percentage points, 19 times out of 20.

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