

Engagement Insights: How OLMC Audiences Connect to Official Language Minority Community Media.

Survey | Summary
Conducted by Nanos for the Consortium of Official Language Minority Community Media, April 2025
Field: March 10th to April 15th, 2025
Submission 2025-2633



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The research gauged the opinions among Francophones outside Quebec and Anglophones in Quebec on local official language minority communities (OLMC) radio stations and newspapers.

Official language minority communities (OLMCs) are groups of people whose preferred official language is not the language of majority in their province or territory. This includes French speakers outside of Quebec and English speakers in Quebec.

Nanos conducted a representative non-probability online survey of 666 Francophones outside Quebec, 18 years of age or older, between March 10th and April 15th, 2025. A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 666 respondents would have a margin of error of ± 3.8 percentage points, 19 times out of 20. The sample is geographically stratified to be representative of Francophones in Canada outside Quebec, and distribution was limited to a set of postal codes that include distribution areas of French-language local community radio stations and newspapers.

Nanos conducted a representative non-probability online survey of 453 Anglophones in Quebec, 18 years of age or older, between March 10th and April 15th, 2025. A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 453 respondents would have a margin of error of ± 4.6 percentage points, 19 times out of 20. The sample is geographically stratified to be representative of Anglophones in Quebec, and distribution was limited to a set of postal codes that include distribution areas of English-language local community radio stations and newspapers.

The statistical tabulations including the unweighted and weighted number of interviews can be accessed here: [by region age and gender \(French\)](#); [by intensity \(French\)](#); [by region age and gender \(English\)](#); [by intensity \(English\)](#).

The research was commissioned by the Consortium of Official Language Minority Community Media and was conducted by Nanos Research.

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This groundbreaking national study of Official Language Minority Communities (OLMC) in Canada provides insight into their media consumption, views and sources of local news content. The study reveals that while Francophone minority communities are more likely to view cultural content as a gateway to local media engagement—valuing it highly as a source of identity and connection—Anglophone minority communities tend to prioritize other types of content, such as local news or community updates, reflecting differing historical and cultural relationships with media.

Official language minority local community media is more trusted than their private counterparts, but to a lesser extent than public broadcasters.

Top sources of local news for both communities are national television and public broadcasters. Of note, Francophone and Anglophone language minorities who have a strong connection and immersive interests in OLMC local media are more likely to be highly educated and immigrants than those who are less connected.

This report includes national and regional insights. To dig deeper into the numbers, Nanos created a series of OLMC consumer segments (Immersed Enthusiasts, Actively Involved, Casually Engaged) based on their intensity of connection and immersion with OLMC experiences in their communities to help better understand the profile and dynamism of Official Language Minority Communities in Canada.

”

Nik Nanos, Chief Data Scientist

OBJECTIVES

1. Monitor consumption and awareness of OLMC media
2. Understand public perceptions of OLMC media
3. Understand desired content of OLMC media
4. Explore sources of local news content

1

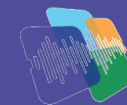
FRANCOPHONES OUTSIDE QUEBEC ARE MORE LIKELY TO REPORT LISTENING TO LOCAL COMMUNITY RADIO; ANGLOPHONES IN QUEBEC MORE LIKELY TO REPORT READING LOCAL COMMUNITY NEWSPAPERS

Radio stations:

Two in five Francophones outside of Quebec report listening to official language minority local community radio stations in the past 12 months, while one in four Anglophones in Quebec report the same. Francophones and Anglophones both most often say the main reason they listen to these radio stations are the music and it being in their preferred language.

Newspapers:

Over two in five Francophones report reading at least one French-language local community newspaper in the last year, while one in two Anglophones report reading an English-language local community newspaper. For both OLMC communities, local information is the top reason they read the newspapers.



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2

OLMC MEDIA RANK SECOND IN TERMS OF TRUST, JUST BEHIND THE PUBLICLY FUNDED BROADCASTERS

Both Francophones outside Quebec and Anglophones in Quebec trust OLMC radio stations and newspapers more than their private counterparts, but less than public broadcasters.

Both language minority communities are more likely to say it is important to be able to access local news and entertainment from official language minority local community media for themselves and for their community. Anglophones are more likely than Francophones to say it is important to access local news and entertainment from OLMC media for themselves and their community.



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FRANCOPHONE LANGUAGE MINORITIES CONSUME MORE NEWS ON SOCIO-CULTURAL ISSUES; ANGLOPHONES FOCUS MORE ON CIVIC AFFAIRS

3

Radio stations:

Francophones select music most often as programming that would most entice them to listen to OLMC radio stations, followed by local news and culture. Anglophones most often select local news, followed by music and international news.

Newspapers:

In terms of preferred newspaper content, Francophones most often select local news, followed by culture and entertainment. Anglophones are more interested in civic news content, with their top selections being local news, international news and political news.



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4

NATIONAL TV AND PUBLIC BROADCASTERS TOP SOURCES OF LOCAL NEWS

National TV and public broadcasters are ranked as the top sources of local news for both Anglophone and Francophone language minorities.



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5

THOSE WHOSE TOP SOURCES OF LOCAL NEWS ARE COMMUNITY MEDIA ARE OPEN TO CONSUMING COMMUNITY MEDIA ONLINE

Although both groups are more likely to be open than not, Anglophones in Quebec who report community radio or newspapers in their top three sources of local news are more open than Francophones outside Quebec to consume content online if it is no longer available in traditional frequencies or in print.

6

OLMC MEDIA SEEN AS RESPONSIVE AND REFLECTIVE BY MOST MINORITY LANGUAGE READERS AND LISTENERS

Over 70 % of Francophones and Anglophones who report listening to at least one OLMC radio station and or read an OLMC newspaper say these media do a good or very good job of adapting to meet the needs and reflect the realities of their community.

Similarly, most Francophones and Anglophones who report reading at least one official language minority local community newspaper say their local community newspapers do a good or a very good job at adapting to answer the needs and reflect the realities of their community.



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KEY FINDINGS – CONSUMPTION OF OLMC RADIO

1

ONE IN FOUR ANGLOPHONES IN QUEBEC REPORT LISTENING TO OLMC RADIO STATIONS; OVER TWO IN FIVE FRANCOPHONES OUTSIDE OF QUEBEC REPORT THE SAME

Overall, over two in five Francophones outside of Quebec (44%) report listening to a French-language local community radio station in the last 12 months. Three in five Francophones in Atlantic Canada (59%) report listening to at least one French-language local community radio station in the past 12 months, while over two in five Franco-Ontarians (42%) report listening to at least one French-language local community radio in the past 12 months. In Western Canada, three in ten Francophones (30%) report listening to a French-language radio station in the past 12 months.

For Anglophones in Quebec, one in four (24%) report listening to an English-language local community radio station in the last 12 months.

2

MUSIC AND LANGUAGE TOP REASONS FOR LISTENING TO OLMC RADIO STATIONS

Francophones who report listening to at least one French-language radio station most often mention it is either because of the music choice (30%) or because it is in their preferred language (28%), followed by local information (21%). Anglophones who report listening to at least one English-language local community radio most often say they listen because it is in their preferred language (32%) and because of music choice (29%). Of note, Anglophones in Montreal are more likely to say they listen because it is in their preferred language (48%), while those in the rest of Quebec are more likely to say it is because of the music choice (36%).

3

ANGLOPHONES WHO REPORT NOT LISTENING TO OLMC RADIO STATIONS PREFER OTHER ENGLISH-LANGUAGE RADIO STATIONS; FRANCOPHONES PREFER ENGLISH-LANGUAGE RADIO STATIONS

Anglophones who report not listening to English-language local community radio stations in the past month are more likely to say they prefer other English-language radio stations (36%), followed by not listening to radio (19%) and not being aware of OLMC radio stations (17%). Of note, Anglophones outside Montreal are more likely to say they prefer French-language radio stations (22%) than those in Montreal (three per cent). Francophones outside Quebec who report not listening to OLMC radio stations are most likely to say it is because they prefer English-language radio stations (38%), followed by generally not listening to radio (22%) and not being aware of OLMC radio stations (14%).

KEY FINDINGS – CONSUMPTION OF OLMC NEWSPAPERS

1

ONE IN TWO ANGLOPHONES IN QUEBEC REPORT READING OLMC NEWSPAPERS; OVER TWO IN FIVE FRANCOPHONES OUTSIDE OF QUEBEC REPORT THE SAME

One in two (50%) Anglophones in Quebec report they read an English-language local community newspaper in the past 12 months; over two in five Francophones (45%) report reading at least one French-language local community newspaper. Over half of Francophones in Atlantic Canada (56%) report they read a French-language local community newspaper, while over two in five Franco-Ontarians (44%) report they have read a French-language local community newspaper in the past 12 months and over one in three Francophones in Western Canada (34%) report the same.

2

LOCAL INFORMATION TOP REASON FOR READING OLMC NEWSPAPERS

Anglophones who report reading an OLMC newspaper are most likely to say they do so because of the local information (47%), it is in their preferred language (27%) or they like the articles/stories (22%). Francophones who report reading an OLMC newspaper say the top reason for doing so is because of local information (41%), followed by liking the articles/stories (31%) and it being their preferred language (27%).

3

FRANCOPHONES WHO REPORT NOT READING OLMC NEWSPAPERS MOST OFTEN SAY THEY PREFER ENGLISH-LANGUAGE NEWSPAPERS OR THAT THEY DO NOT READ NEWSPAPERS; ANGLOPHONES MOST FREQUENTLY CITE NOT READING NEWSPAPERS

Francophones outside of Quebec who report not reading OLMC newspapers are most likely to say they do not read French-language community newspapers because they prefer English-language newspapers (35%), followed by not reading newspapers in general (30%) and not being aware of French-language local community newspapers (15%). Anglophones who report not reading OLMC newspapers most often mention that they do not read newspapers at all (33%), followed by not being aware of English-language local community newspapers (20%) and preferring French-language newspapers (14%). Of note, Anglophones outside of Montreal are more likely to say they prefer French-language newspapers (20%) than those in Montreal (two per cent).

KEY FINDINGS – PERCEPTIONS OF OLMC MEDIA

1

FRANCOPHONES OUTSIDE OF QUEBEC HAVE LOWER TRUST IN INFORMATION FROM OLMC MEDIA THAN ANGLOPHONES IN QUEBEC; OLMC MEDIA MORE LIKELY TO BE TRUSTED THAN THEIR PRIVATE COUNTERPARTS, BUT LESS THAN PUBLIC BROADCASTERS

Although Francophones are much more likely to trust OLMC media ([mean of 6.6 for French-language local community radio stations, mean of 6.6 for newspapers](#)) than not trust, they generally have lower trust of OLMC media than Anglophones ([mean of 7.1 for English-language Local community newspapers and mean of 7.0 for radio stations](#)). Among Francophones, those in Atlantic Canada are more likely to trust the information from OLMC radio stations ([mean of 7.1](#)) and newspapers ([mean of 7.1](#)) than other Francophones from Ontario or Western Canada.

Of note, public broadcasters received the highest trust score for both linguistic groups ([mean of 7.2 trust for Anglophones in Quebec, mean of 7.0 for Francophones outside Quebec](#)), while social media posts receive the lowest trust scores ([mean of 5.3 for Francophones outside Quebec, mean of 4.2 for Anglophones in Quebec](#)). Private newspapers ([mean of 6.2 among Anglophones; mean of 6.0 among Francophones](#)) and radio stations ([mean of 6.1 among Anglophones, mean of 6.2 among Francophones](#)) are less likely to be trusted than their OLMC counterparts.

2

OLMC RADIO STATION LISTENERS ACROSS REGIONS SAY THEIR OLMC RADIO STATIONS DO A GOOD OR VERY GOOD JOB AT ADAPTING TO ANSWER THE NEEDS AND REFLECT THE REALITIES OF THEIR COMMUNITY

A majority of Anglophones in Quebec who report listening to at least one local community radio station say that their OLMC radio stations do a good ([47%](#)) or very good ([40%](#)) job at adapting to answer the needs and reflect the realities of their community.

3

MOST OLMC NEWSPAPER READERS IN ALL REGIONS SAY THEIR OLMC NEWSPAPERS DO A GOOD OR VERY GOOD JOB AT ADAPTING TO THE NEEDS OF THEIR COMMUNITY AND REFLECTING THEIR REALITIES

Consistent with radio stations, a majority of Francophones outside Quebec who report reading at least one OLMC newspaper say their OLMC newspapers do a good ([44%](#)) or very good job ([32%](#)) at adapting to answer the needs and reflect the realities of their community. This is consistent for Francophones in Atlantic Canada ([48% say good, 34% say very good job](#)), Ontario ([42% say good, 31% say very good job](#)) and Western Canada ([44% say good, 34% say very good](#)).

Additionally, a majority of Anglophones in Quebec say that their OLMC newspapers do a good ([40%](#)) or very good ([34%](#)) job at adapting to answer the needs and reflect the realities of their community.

KEY FINDINGS – PERCEPTIONS OF OLMC MEDIA CONT'D

4

BEING ABLE TO ACCESS LOCAL NEWS FROM OLMC SOURCES RATED AS MORE IMPORTANT BY ANGLOPHONES IN QUEBEC THAN FRANCOPHONES OUTSIDE QUEBEC FOR INDIVIDUALS AND THEIR COMMUNITY

Two in three Anglophones in Quebec say being able to **access local news** from OLMC radio stations and newspapers is **important to themselves** ([65%](#) give an importance score of seven or more out of ten, for a mean score of [7.1](#) on a 0-10 scale). Comparatively, just over half of Francophones outside Quebec say being able to **access local news** from OLMC radio stations and newspapers is **important to themselves** ([51%](#), for a mean importance score of [6.2](#) on a 0-10 scale).

Similarly to personal importance scores, two in three Anglophones in Quebec say that being able to **access local news** from OLMC radio stations and newspapers is important **to their communities** ([65%](#) give an importance score of seven or more out of ten, for a mean score of [7.2](#) out of ten). Over one in two Francophones outside Quebec say the same ([52%](#), for a mean score of [6.2](#) out of ten).

5

BEING ABLE TO ACCESS SPORTS, ENTERTAINMENT AND CULTURAL CONTENT FROM OLMC SOURCES SEEN AS IMPORTANT TO FRANCOPHONES COMMUNITIES AS LOCAL NEWS

Francophones score a similar importance to their **communities** for being able to **access local sports, entertainment and cultural** content through OLMC radio stations and newspapers ([49%](#) give an importance score of seven or more out of ten, for a mean of [5.9](#), which is consistent with the importance assigned to being able to access local news from OLMC media for their communities). Close to three in five Anglophones say being able to **access local sports, entertainment and cultural** content through OLMC radio stations and newspapers is important to their **community** ([58%](#) give an importance score of seven or more out of ten, for a mean of [6.7](#)).

Anglophones in Quebec are most likely to say being able to **access local sports entertainment, and cultural content** from OLMC radio stations and newspapers is **important to themselves** ([59%](#), give an importance score of seven or more out of ten, for a mean score of [6.8](#) on a 0-10 scale), which is higher than the personal importance given by Francophones outside Quebec to being able to access this content from OLMC radio stations and newspapers ([46%](#) say it is important to themselves, for a mean of [5.9](#) on a 0-10 scale).

KEY FINDINGS – DESIRED OLMC MEDIA CONTENT

1

ANGLOPHONES MOST OFTEN SELECT LOCAL NEWS, FOLLOWED BY INTERNATIONAL NEWS AND MUNICIPAL POLITICAL NEWS AS THE NEWSPAPER CONTENT THAT WOULD ENTICE THEM TO READ LOCAL COMMUNITY OFFICIAL LANGUAGE MINORITY NEWSPAPERS; FRANCOPHONES MOST OFTEN SELECT LOCAL NEWS, FOLLOWED BY CULTURE

Local news is the most often selected as the most enticing content for local community newspapers for Anglophones (57%). This is followed by international news (35%), political news (municipal) (34%), entertainment (31%) and health & wellbeing (28%).

Francophones outside Quebec also most frequently select local news (34%) most as what would entice them to read French-language local community newspapers. Following local news, Francophones select most often culture (24%), entertainment (21%), sports (21%) and political news (municipal) (21%).

2

FRANCOPHONES OUTSIDE QUEBEC MOST LIKELY TO SELECT MUSIC AS PROGRAMMING THAT WOULD ENTICE THEM TO LISTEN TO OLMC RADIO, FOLLOWED BY LOCAL NEWS WHILE ANGLOPHONES MOST FREQUENTLY PREFER LOCAL NEWS, FOLLOWED BY MUSIC

Francophones most often select music (43%), followed by local news (36%) and culture (27%) as their top choice for enticing them to listen to local community radio, while Anglophones most frequently select local news (56%), followed by music (50%) as their top choices.

Francophones are generally more likely to select radio programming related to culture and entertainment (e.g., music, culture, sports) in their top content than news and information. Anglophones are more likely to select news (e.g., local news, international news, municipal political news) compared to cultural and entertainment content.

KEY FINDINGS – SOURCES OF LOCAL NEWS

1

ANGLOPHONE COMMUNITY RADIO LISTENERS AND COMMUNITY NEWSPAPER READERS MORE OPEN TO CONSUMING CONTENT ONLINE IF IT WERE NO LONGER AVAILABLE IN TRADITIONAL FORMS THAN THEIR FRANCOPHONE COUNTERPARTS

About seven in ten Anglophones in Quebec who report listening to a local English-language community radio station say they are open ([36%](#)) or somewhat open ([35%](#)) to listening to their radio station online if it is no longer available on traditional radio frequencies. Comparatively fewer Francophones outside of Quebec who report listening to a French-language community radio station say the same about listening to their radio station online ([29% open, 26% somewhat open](#)).

Similarly, three in four Anglophones in Quebec who report reading a local English-language community newspaper say they would be open to some extent to reading their newspaper online if it were no longer available in traditional print ([34% open, 40% somewhat open](#)). Conversely, one in two Francophones outside of Quebec who report reading a French-language local community newspaper who say the same regarding their openness to reading their community paper online ([22% open, 29% somewhat open](#)).

2

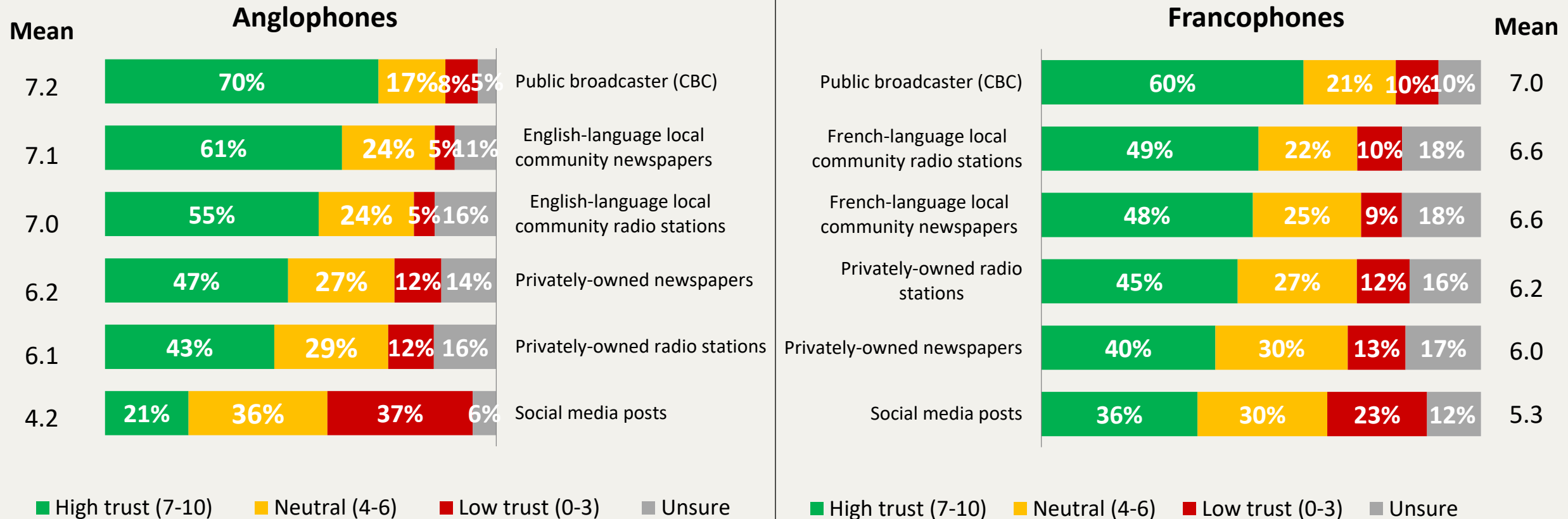
NATIONAL TELEVISION AND PUBLIC BROADCASTERS ARE TOP SOURCES OF LOCAL NEWS FOR BOTH FRANCOPHONE AND ANGLOPHONE OLMCS

When asked their top three main sources of local news in their community, Anglophones in Quebec most frequently select national television ([37%](#)) and public broadcasters ([35%](#)), followed by English language local television ([30%](#)). Similarly, Francophones outside of Quebec also most often select national television ([37%](#)) and public broadcasters ([33%](#)) as their main sources of local news.

Of note, Francophones outside of Quebec are more likely to say they get their local community news from English-language radio stations ([25%](#)) than Anglophones in Quebec are to say they get their local community news from French-language radio stations ([13%](#)). Additionally, Anglophones in Quebec are more likely to rank English-language local television ([30%](#)), community newspapers ([22%](#)) and news websites/apps ([20%](#)) in their top three sources of local news than Francophones outside of Quebec are to rank the French-language equivalents in their top sources ([13% for French-language local television; 11% for French-language local community newspapers; nine percent for French-language news websites/apps](#)).

Trust in media - Francophones and Anglophones

Q – On a scale of 0 to 10, where 0 is no trust and 10 is complete trust, please rate how much you trust the information from the following sources: [RANDOMIZE]



Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside Quebec and n=452 Anglophones in Quebec.



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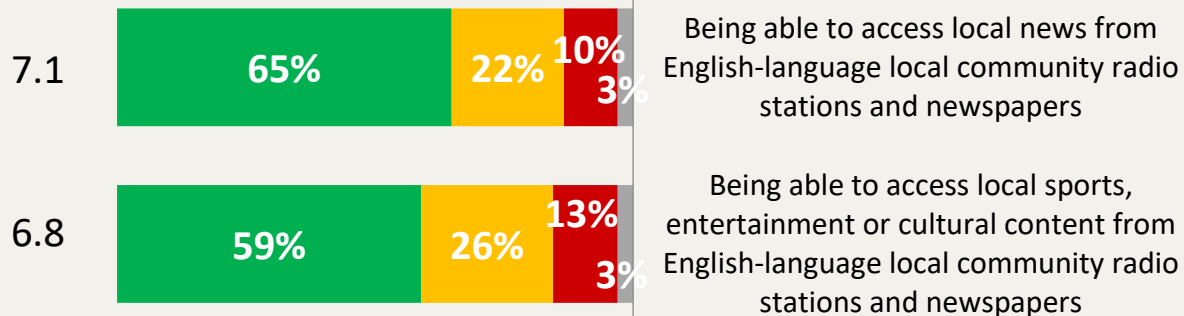
Importance of OLMC media – Francophones and Anglophones

Q – On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to you: [ROTATE]

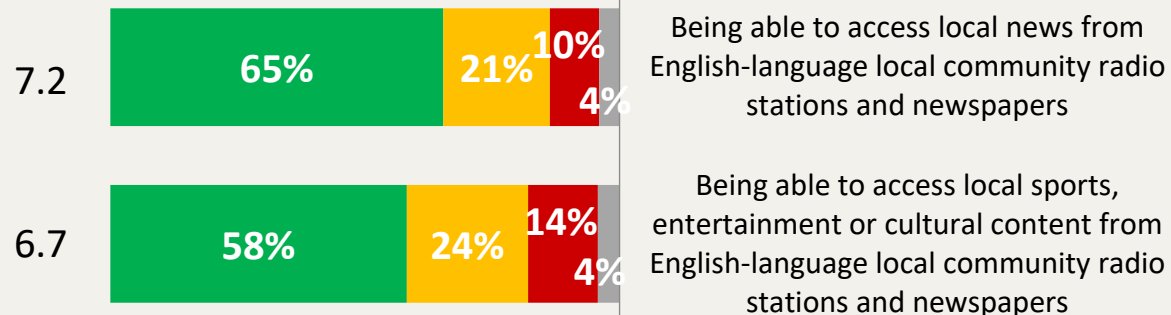
Q – On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to your community: [ROTATE]

Anglophones

Mean Importance to individuals



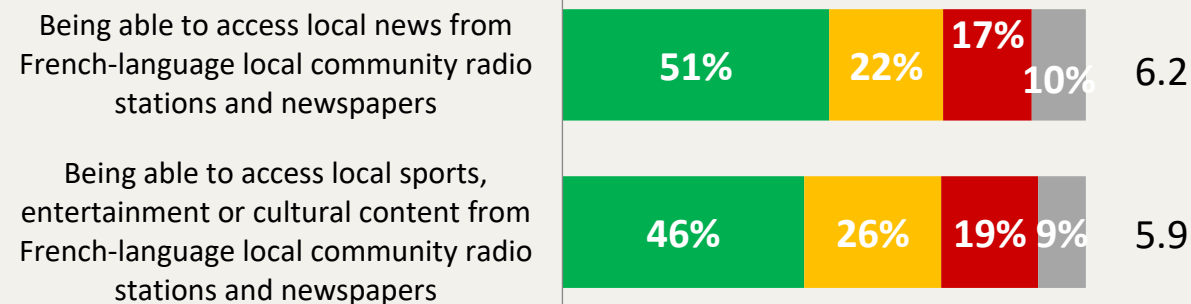
Mean Importance to communities



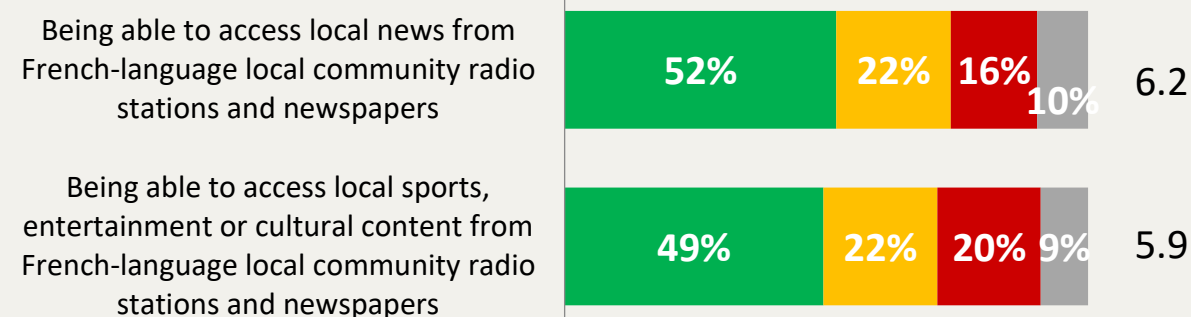
■ High importance (7-10) ■ Neutral (4-6) ■ Low importance (0-3) ■ Unsure

Francophones

Mean Importance to individuals



Mean Importance to communities



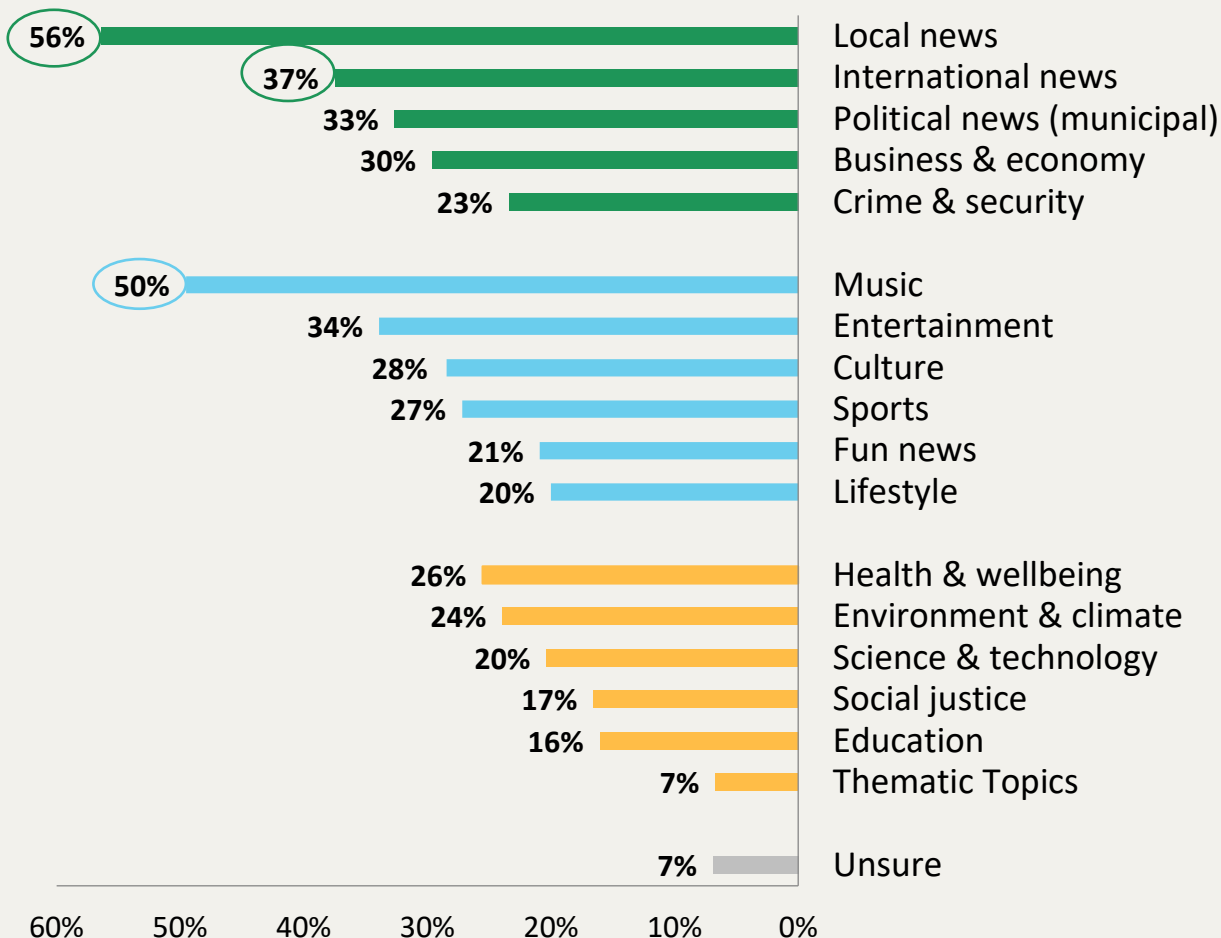
■ High importance (7-10) ■ Neutral (4-6) ■ Low importance (0-3) ■ Unsure

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=665 Francophones outside Quebec and n=452 Anglophones in Quebec.

Enticing content for local community radio

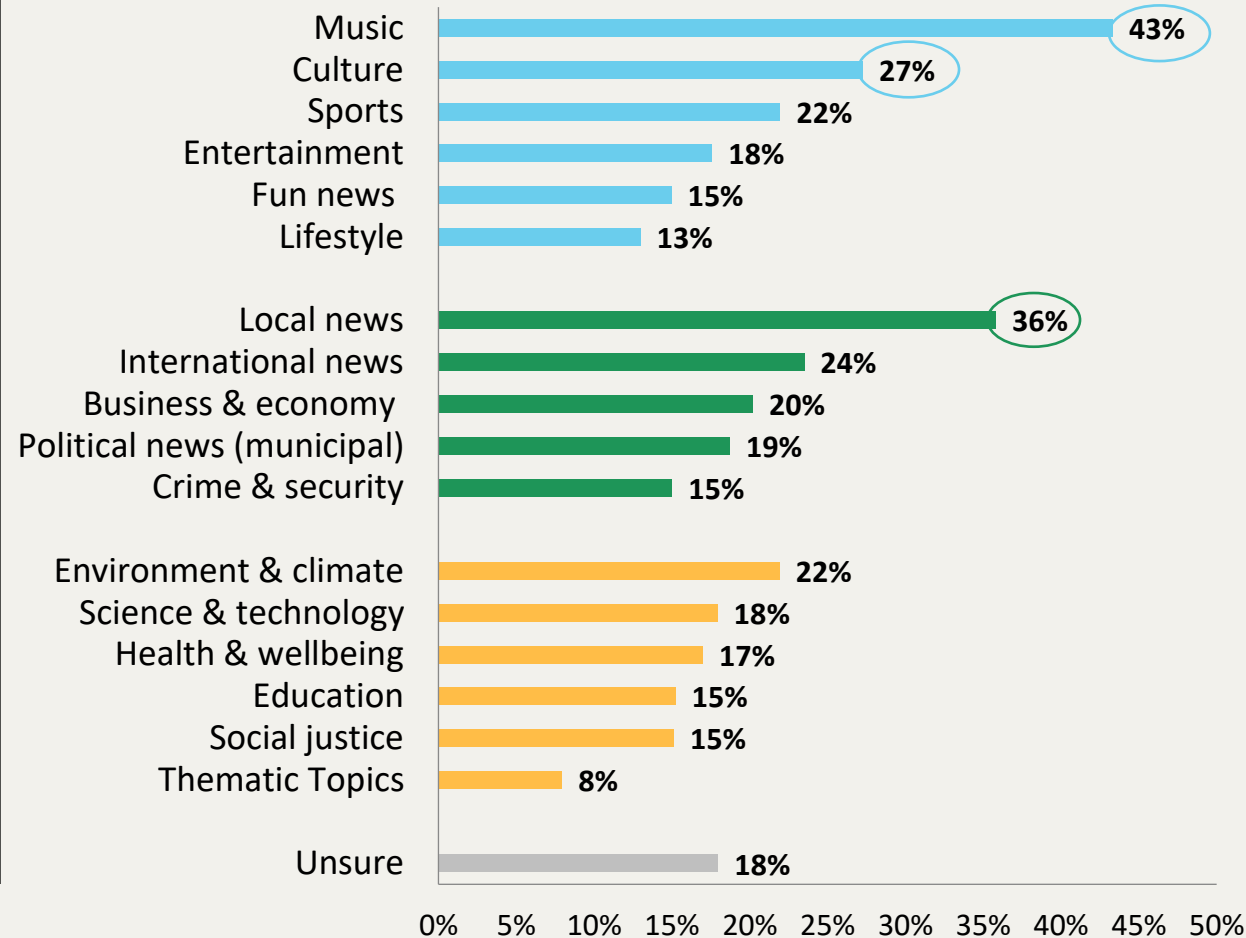
Anglophones

Q – Please select the following types of English-language local community radio station programming that are the most likely to entice you to listen.
[SELECT ALL THAT APPLY] [RANDOMIZE]



Francophones

Q – Please select the following types of French-language local community radio station programming that are the most likely to entice you to listen.
[SELECT ALL THAT APPLY] [RANDOMIZE]



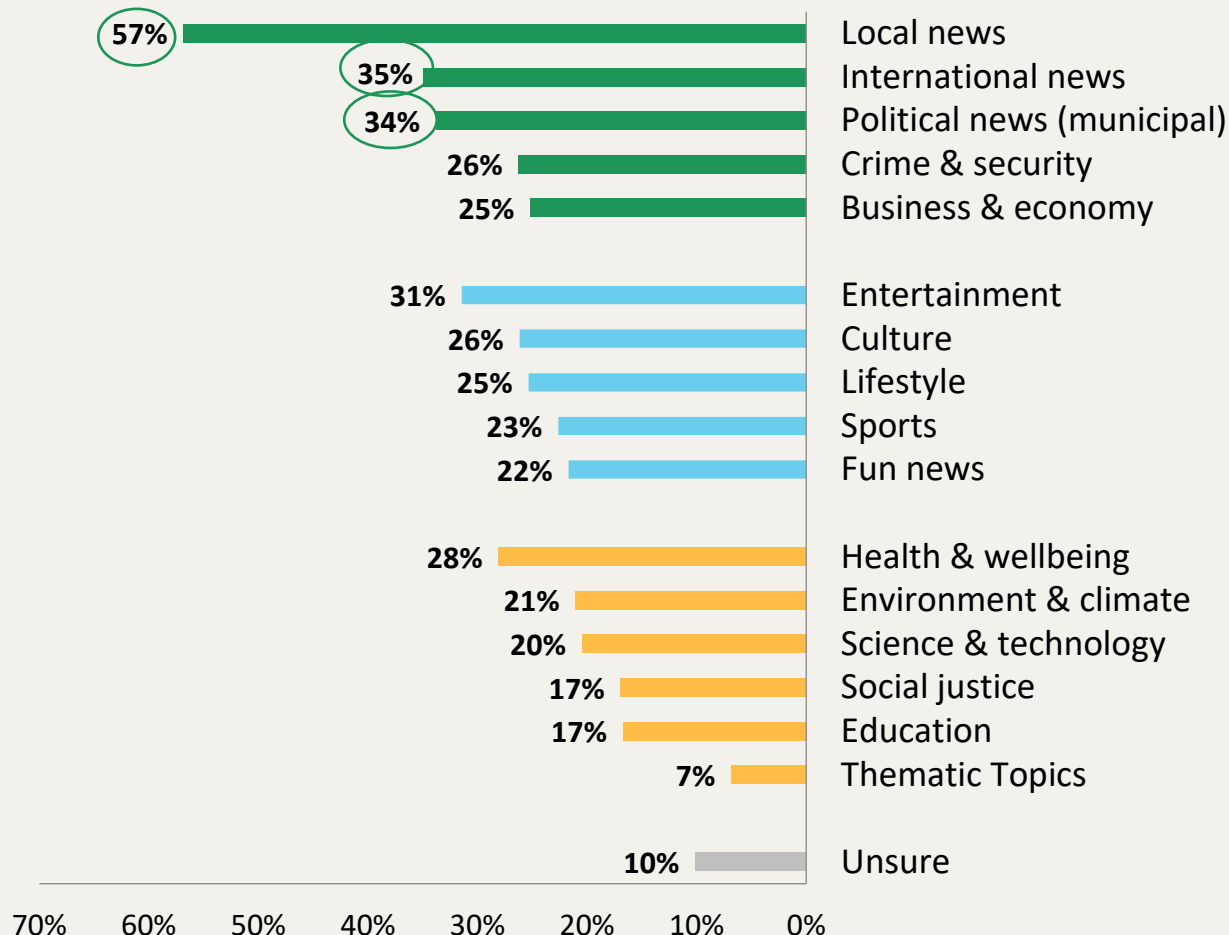
*Note: Circles represent the top three local community radio content for Anglophone and Francophone respondents. Responses are based on multiple selections.

Enticing content for local community newspapers

Anglophones

Q – Please select the following types of English-language local community newspaper content that are the most likely to entice you to read.

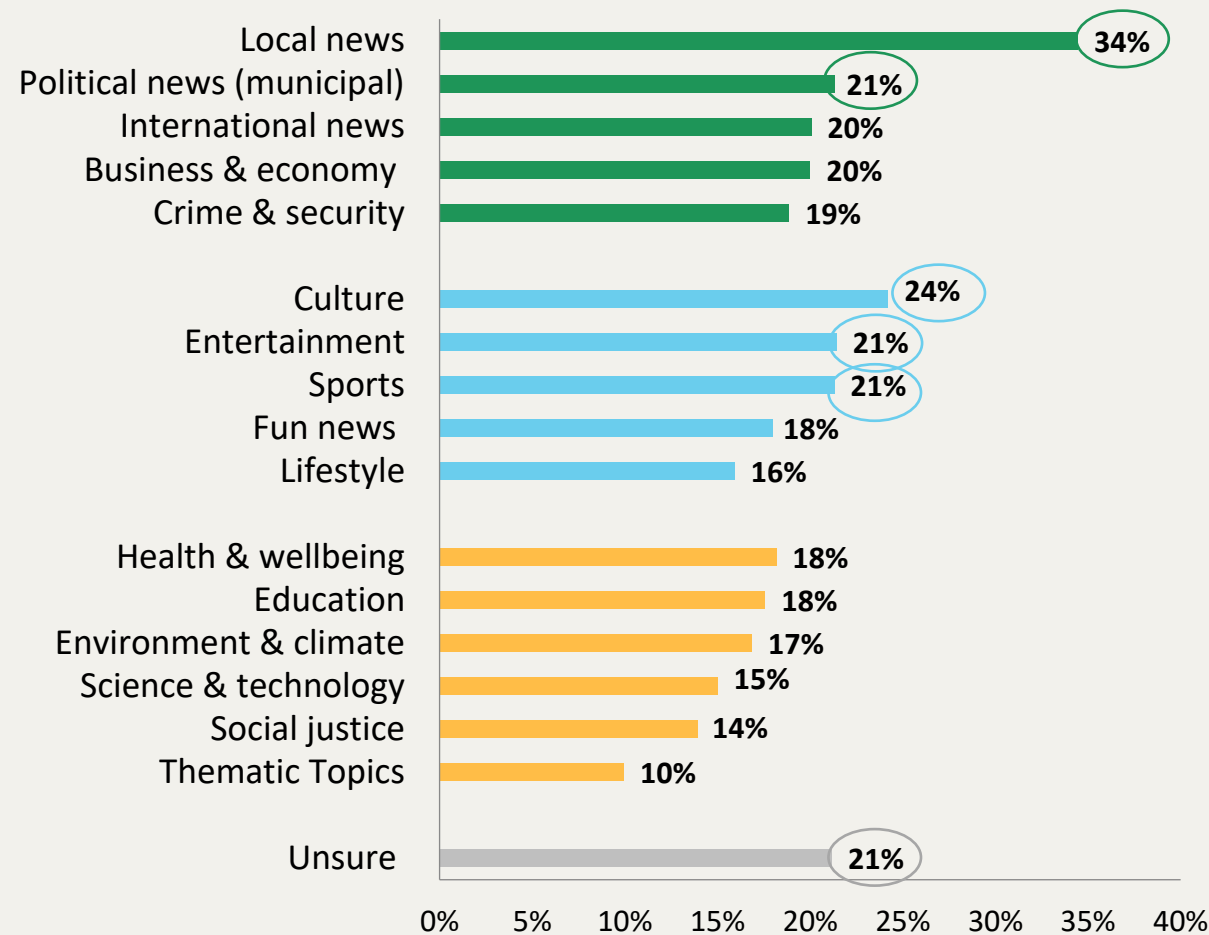
[RANDOMIZE] [SELECT ALL THAT APPLY]



Francophones

Q – Please select the following types of French-language local community newspaper content that are the most likely to entice you to read.

[RANDOMIZE] [SELECT ALL THAT APPLY]



*Note: Circles represent the top local community newspaper content for Anglophone and Francophone respondents. Responses are based on multiple selections.

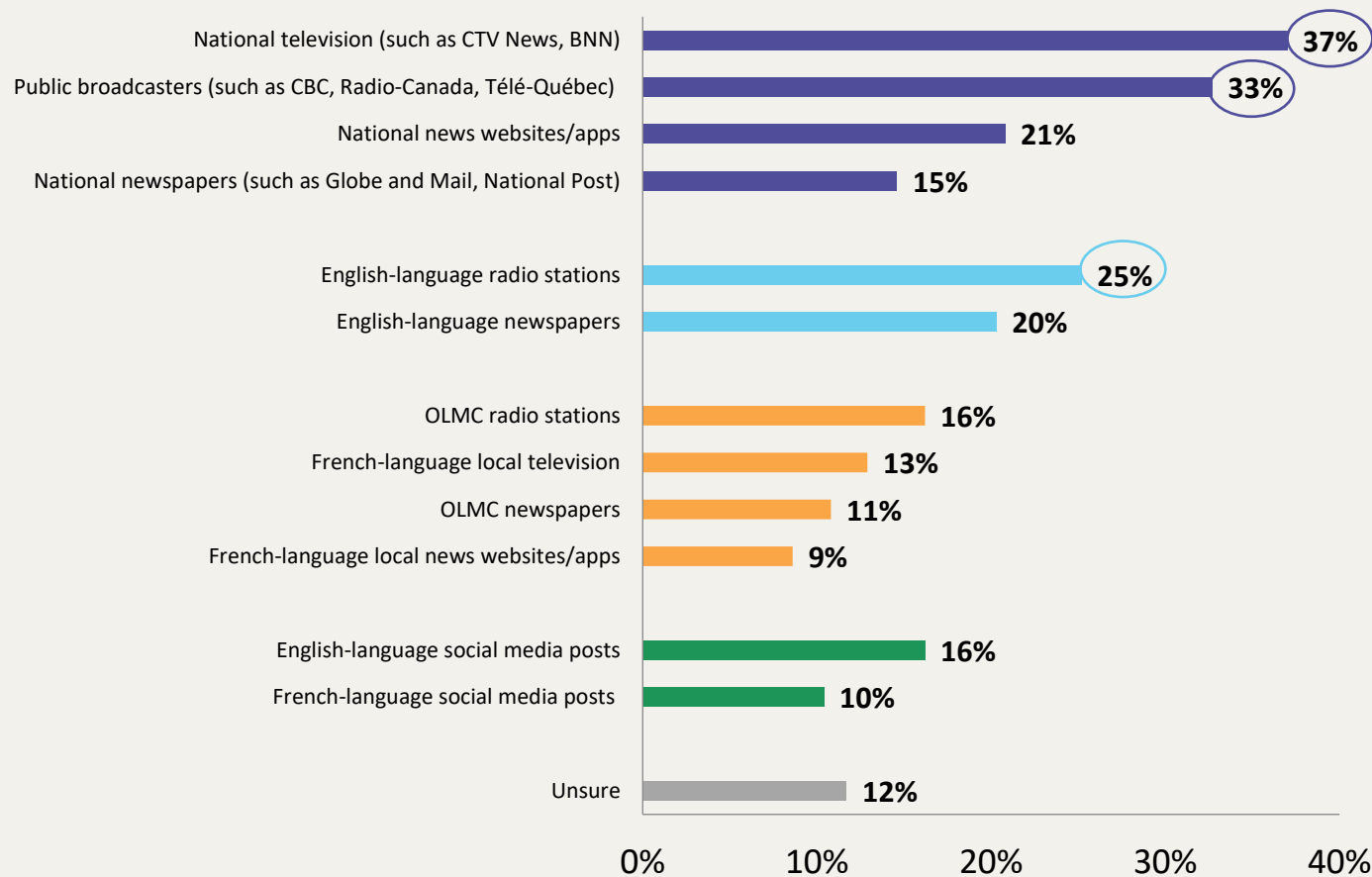
PART I - Francophones outside Quebec

This section focuses on awareness and views of French-language local community radio stations and newspapers for 666 Francophones outside Quebec.

Top sources of local news - FRANCOPHONES

Main sources of local news

Q – Please select your top three main sources of local news in your community. [SELECT UP TO 3] [RANDOMIZE]



Trust in official language local community media

Q – On a scale of 0 to 10, where 0 is no trust and 10 is complete trust, please rate how much you trust the information from the following sources: [RANDOMIZE]

Top three main
sources of local
news

High trust
(scores of 7-10)

French-
language local
community
newspaper

11%

49%

French-
language local
community
radio stations

16%

48%

*Note: Circles represent the top three local community radio content for Anglophone and Francophone respondents. Responses are based on multiple response options.

*Weighted to the true population proportion.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside Quebec.



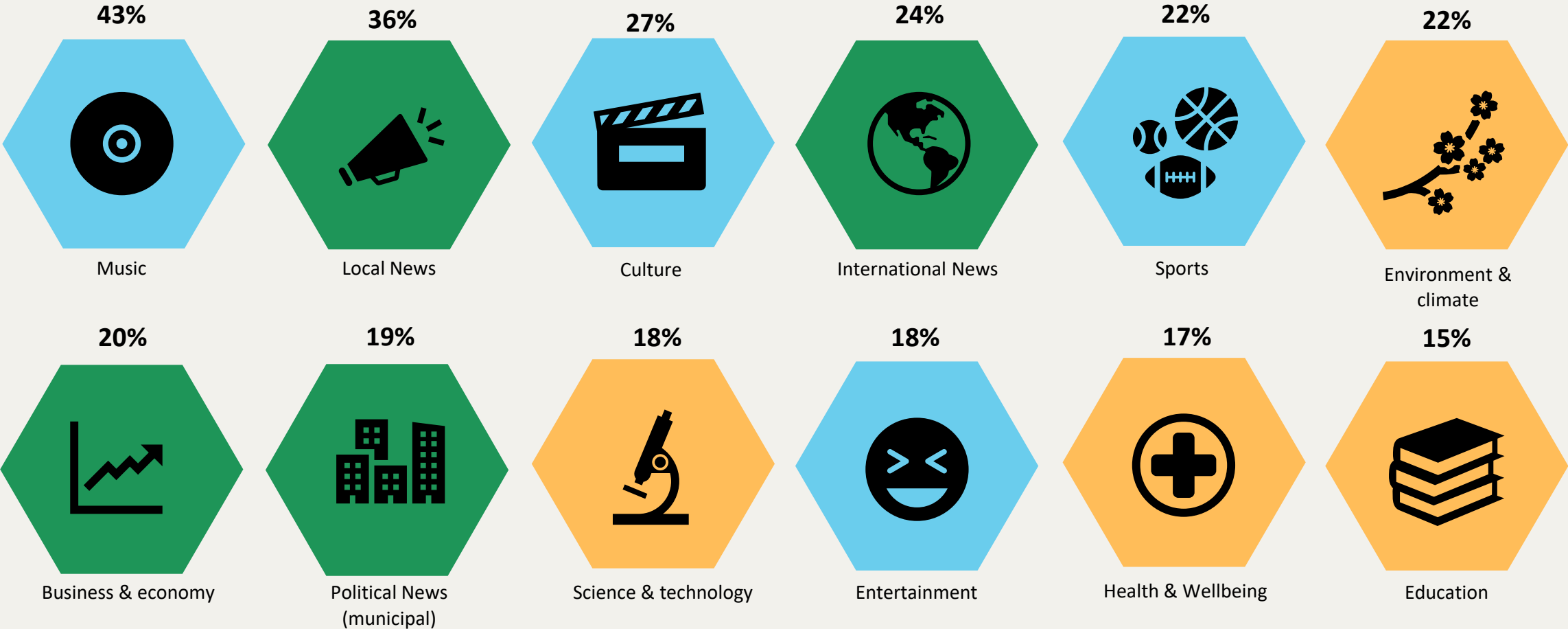
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Preferred programming for OLMC radio stations - FRANCOPHONES

Q – Please select the following types of French-language local community radio station programming that are the most likely to entice you to listen. [SELECT ALL THAT APPLY] [RANDOMIZE]

TOP 12 SELECTIONS



*Based on multiple response options

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=663 Francophones outside Quebec.



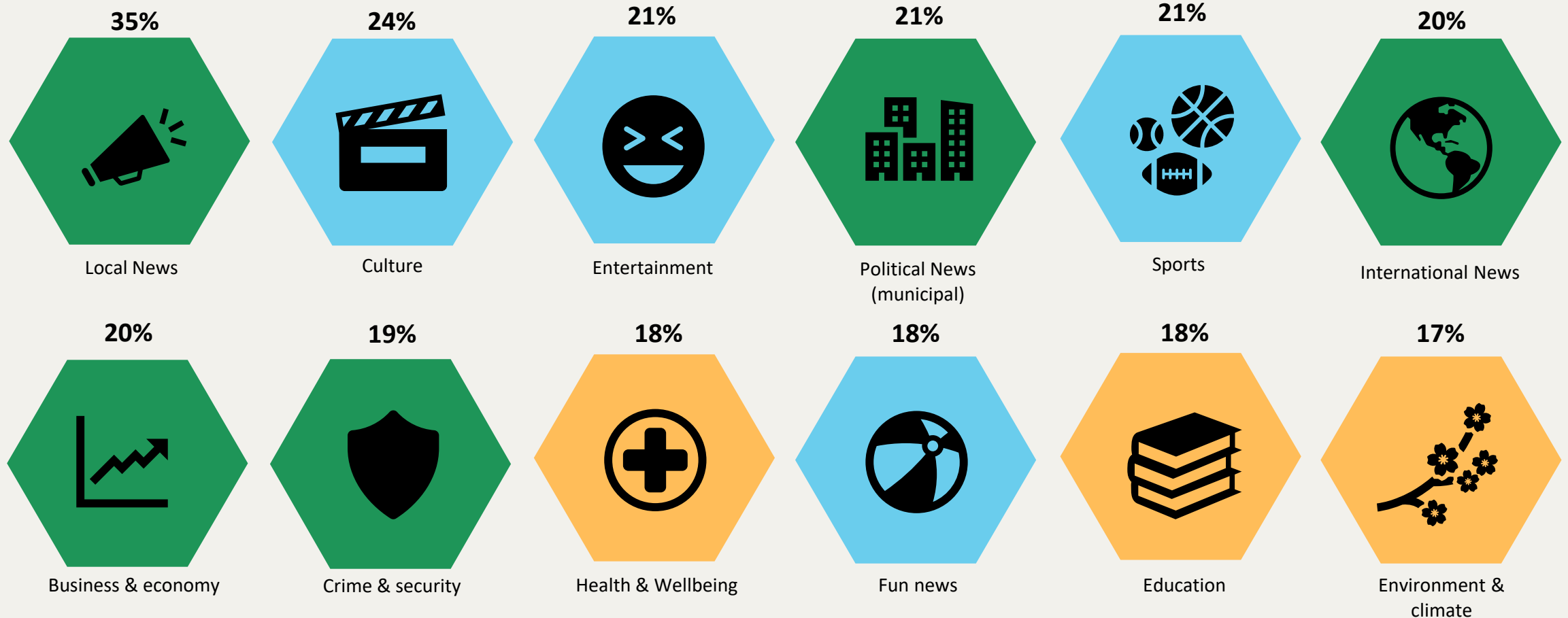
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Preferred content for OLMC newspapers - FRANCOPHONES

Q – Please select the following types of French-language local community newspaper content that are the most likely to entice you to read.
[RANDOMIZE] [SELECT ALL THAT APPLY]

TOP 12 SELECTIONS



*Based on multiple response options

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=664 Francophones outside Quebec.



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KEY MARKET PROFILES - FRANCOPHONES

Profile 1 – Casually Engaged – 51% of Francophones outside of Quebec

Francophones outside of Quebec who have focused interests in OLMC radio stations and newspapers. Their desired content for this is limited to fewer than six types of programming/content out of a choice of 34 different types such as news, culture, and sports and entertainment. Their connection to OLMC media is less intense and more casual.

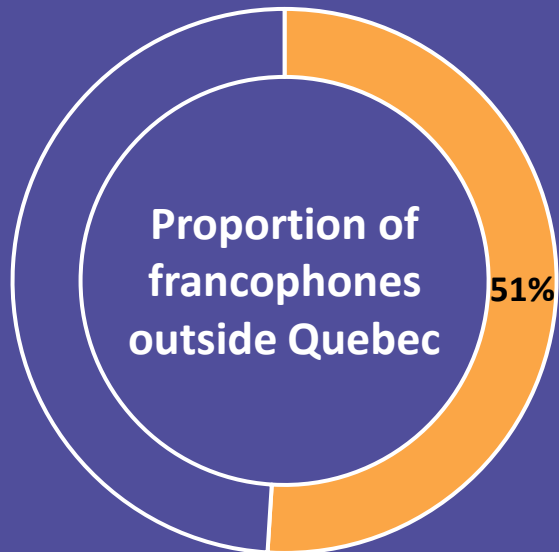
Profile 2 – Actively Involved – 29% of Francophones outside of Quebec

Francophones outside of Quebec who have an active interest in OLMC radio stations and newspapers. They are interested in different types of content (6- 10 types of programming out of a choice of 34 different types such as news, culture, and sports and entertainment). Their connection to OLMC media is stronger but still has room to grow.

Profile 3 – Immersed Enthusiasts – 20% of Francophones outside of Quebec

Francophones outside of Quebec who are strongly engaged with OLMC Francophone radio stations and newspapers. They are interested in a wide variety of types of content (11+ types of programming out of a choice of 34 different types such as news, culture, and sports and entertainment). Their connection to OLMC media is deep and varied.

Casually Engaged



Key Market Profiles – Francophone OLMCs outside of Quebec – AT A GLANCE

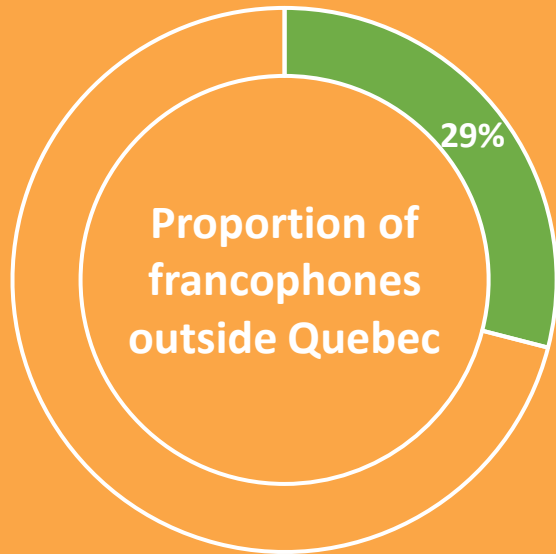


Focused and more casual interest in OLMC radio stations and newspapers, with limited desired content and programming from this local media.

- Less likely to be educated at a college or university level
- Lower trust in OLMC media
- Perceived importance of access to OLMC media is lower

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.

Actively Involved



Key Market Profiles – Francophone OLMCs outside of Quebec – AT A GLANCE



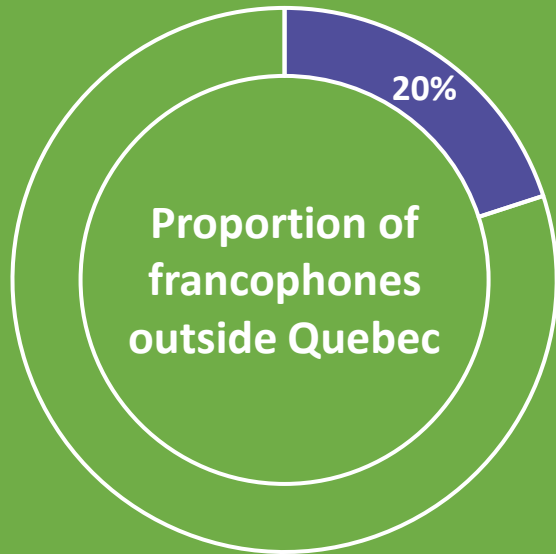
Active interest in OLMC radio stations and newspapers, and stronger connection to local media than the casually engaged, but room to grow with an interest in varied content and programming.

- More likely to be a third generation or more Canadian citizen
- More likely to have a university or graduate degree.
- More likely to say their OLMC radio stations do a good job at adapting to reflect the realities of their community
- More likely to trust information provided by OLMC media
- More likely to turn to Anglophone radio stations than other groups for local news

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.

Key Market Profiles – Francophone OLMCs outside of Quebec – AT A GLANCE

Immersed Enthusiasts



Strongly engaged with a deep connection to OLMC radio stations and newspapers. Interested in extensive French-language content and programming.

- More likely to have a higher level of education, more likely to report higher levels of income
- Most likely to say that they listen to OLMC radio stations because it is in their preferred language
- Most likely to turn to local Francophone media for local information
- Not knowing the OLMC radio stations or newspapers is the main reason for not listening or reading
- Most likely among profiles to be an immigrant
- Highest level of trust in the information provided by OLMC media

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.



Casually Engaged

Focused and more casual interest in OLMC radio stations and newspapers, with limited desired content and programming from this local media.

Less likely to be educated at a college or university level.

Key Market Profiles – Francophone OLMCs outside of Quebec – Casually Engaged

- The Casually Engaged report **lower levels of education** than other profiles (29% have high school level of education) and are more likely to have a **lower household income** (44% have an income under \$60K).
- **Choice of music** is the top reason why Casually Engaged Francophones listen to OLMC radio (33%).
- The Casually Engaged who report not listening to local Francophone radio stations or not reading local Francophone newspapers are more likely than other profiles to say it's because **they prefer Anglophone** radio stations (44%) and newspapers (42%).
- **Trust in OLMC media is lower** compared to other groups (mean of 5.6 out of 10 for both local Francophone newspapers and radio stations).
- **Perceived importance of access to OLMC media is lower** for Casually Engaged Francophones both for themselves as individuals (mean of 4.6 out of 10 for local news, 4.5 out of 10 for local content on sports and culture) and for the community (4.7 out of 10 for local news mean of 4.3 out of 10 for local content on sports and culture).
- The main **sources of local news** for the Casually Engaged are **national TV** (30%) and **Anglophone radio stations** (24%).
- Although a majority of Casually Engaged Francophones believe OLMC radio does a good/very good job at adapting and reflecting the reality of their community (63%), this is lower than the Actively Involved (81%). Views are similar when it comes to local Francophone newspapers (68% say they do a good/very good job).

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.



Actively Involved

Active interest in OLMC radio stations and newspapers, and stronger connection to local media than the casually engaged, but room to grow with an interest in varied content and programming.

More likely to be a third generation or more Canadian citizen and to have a university or graduate degree.

Key Market Profiles – Francophone OLMCs outside of Quebec – Actively Involved

- Compared to Casually Engaged individuals, Actively Involved Francophones report **higher levels of education** (50% have a university/graduate degree), and are more likely to be a **third or more generation Canadian** (62%).
- The Actively Involved have **more varied reasons to why they listen to OLMC radio** including that it is their preferred language (29%), the choice of music (28%) and the local information (26%).
- Those who report not listening to local Francophone radio say it's because **they prefer Anglophone radio** (31%) or that **they don't listen to the radio** (29%).
- Actively Involved Francophones are more likely than the Casually Engaged to say OLMC radio stations do a **good/very good job at reflecting the reality** of their community (81% vs. 63%).
- One quarter of Actively Involved profile say they **don't read OLMC newspapers** because **they aren't aware of them** (25%), which is higher than the Casually Engaged (nine per cent).
- The Actively Involved are **more likely to trust the information** provided by **OLMC media** (mean of 7.0 for newspapers, 7.2 for radio) than privately owned media (mean of 6.1 for newspapers, 6.4 for radio).
- While the main sources of local news for Actively Involved Francophones are national TV (47%) and public broadcasters (36%), they are **more likely than other groups to turn to Anglophone radio stations** (33%).

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.



Immersed Enthusiasts

Strongly engaged with a deep connection to OLMC radio stations and newspapers. Interested in extensive French-language content and programming.

They are more likely to be an immigrant than other profiles and have a university level of education and a higher income.

Key Market Profiles – Francophone OLMCs outside of Quebec – Immersed Enthusiasts

- Immersed Enthusiasts report the **highest levels of income** (30% have a household income of \$120K or more) and **highest levels of education** (60% have a university/graduate degree). They are also more likely than other profiles to be **an immigrant** (25%).
- Immersed Enthusiasts are most likely to say that they **listen to OLMC radio stations** because it is in their **preferred language** (38%).
- **Not knowing** the OLMC radio stations (36%) is the **main reason** for Immersed Enthusiasts for **not listening to them**.
- Compared to the Casually Engaged, Immersed Enthusiasts who don't read OLMC newspapers are more likely to say they don't read the because they **aren't aware of them** (27% vs. 9%).
- Immersed Enthusiasts report the **highest level of trust** in the information provided by OLMC media (mean of 7.8 for newspapers, 7.7 for radio) compared to the other two profiles.
- **Access to OLMC media is important** to Immersed Enthusiasts, both for themselves individually (8.2 out of 10 for local news, 7.6 for sports and culture) and for the community (8.1 out of 10 for local news, 7.8 for sports and culture).
- They are the group **most likely to turn to local Francophone media** such as local Francophone radio (24%), local Francophone TV (24%) local Francophone newspapers (15%) for local information.
- Immersed Enthusiasts are also more likely than other profiles to look for **community information** through **social media posts in French** (21%) and are less likely to do so through Anglophone radio (17%).

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.

FRANCOPHONE PROFILES – Intensity scores

| Demographic* | | Profile 1 – Casually Engaged (n=340) | Profile 2 – Actively Involved (n=195) | Profile 3 – Immersed Enthusiasts (n=131) |
|--------------------|--|---|--|--|
| Region | Atlantic Canada | 24.1% | 31.1% | 26.7% |
| | Ontario | 56.4% | 49.3% | 54.5% |
| | Western Canada | 19.5% | 19.5% | 18.8% |
| Gender | Men | 47.8% | 50.8% | 48.1% |
| | Women | 52.2% | 49.2% | 51.9% |
| Age | 18-34 | 24.5% | 30.6% | 25.9% |
| | 35-54 | 33.2% | 31.2% | 33.1% |
| | 55 plus | 42.3% | 38.3% | 41.0% |
| Immigration Status | Third or more generation Canadian citizen | 49.9% | 62.0% | 59.4% |
| | First- or second-generation Canadian citizen | 26.3% | 23.4% | 15.8% |
| | Immigrant (not born in Canada) | 13.6% | 12.8% | 24.8% |

*Excludes “Prefer not to say”, totals may not add up to 100.

*Circles indicate a notable difference between profiles.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.

FRANCOPHONE PROFILES – Intensity scores

| Demographic* | | Profile 1 – Casually Engaged (n=340) | Profile 2 – Actively Involved (n=195) | Profile 3 – Immersed Enthusiasts (n=130) |
|--------------|---|---|--|---|
| Income | Under \$40,000 | 25.6% | 15.8% | 17.7% |
| | \$40,000 to \$80,000 | 31.3% | 34.3% | 24.9% |
| | \$80,000 to \$120,000 | 20.4% | 24.3% | 24.5% |
| | Over \$120,000 | 17.6% | 16.1% | 30.4% |
| Education | Graduated high school or some high school | 29.2% | 21.4% | 14.2% |
| | Some college or university | 7.9% | 8.2% | 9.1% |
| | Completed college | 25.0% | 18.0% | 16.7% |
| | Completed university or grad studies | 35.0% | 49.5% | 60.0% |

*Excludes “Prefer not to say”, totals may not add up to 100.

*Circles indicate a notable difference between profiles.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside of Quebec.

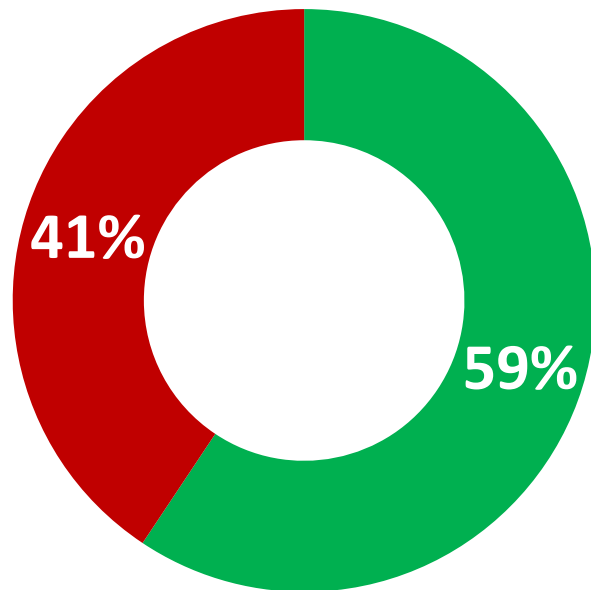
Francophones in Atlantic Canada

This section focuses on awareness and views of French-language local community radio stations and newspapers of Atlantic Canada for 97 Francophones in Atlantic Canada, including 58 from New Brunswick, 20 from Nova Scotia, 17 from Newfoundland and Labrador 2 from Prince Edward Island.

A professional broadcast microphone, likely a Neumann U87, is suspended in a radio studio. The microphone has a silver grille and is mounted on a boom arm. In the background, there are blurred elements of a radio station, including a control panel with red and green lights and a desk with papers. The image is darkened with a blue overlay on the right side.

Awareness – Radio stations (Atlantic Canada)

Francophones in Atlantic Canada
(n=82)



- Listened to at least one French-language local community radio station
- Did not listen to any French-language local community radio station

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Listening to local community radio stations - FRANCOPHONES

Francophones outside Quebec (overall)

| Listened to at least one French-language local community radio station | Outside Quebec (n=646) | Ontario (n=348) | West (n=216) | | |
|--|------------------------|-----------------|------------------|------------------|-----------------|
| | 44.0% | 41.7% | 30.2% | | |
| | Men (n=354) | Women (n=292) | 18 to 34 (n=163) | 35 to 54 (n=255) | 55 plus (n=228) |
| Did not listen to any French-language local community radio station | 51.8% | 36.6% | 58.4% | 44.3% | 34.3% |
| | 56.0% | 58.3% | 69.8% | | |
| | Men (n=354) | Women (n=292) | 18 to 34 (n=163) | 35 to 54 (n=255) | 55 plus (n=228) |
| | 48.2% | 63.4% | 41.6% | 55.7% | 65.7% |

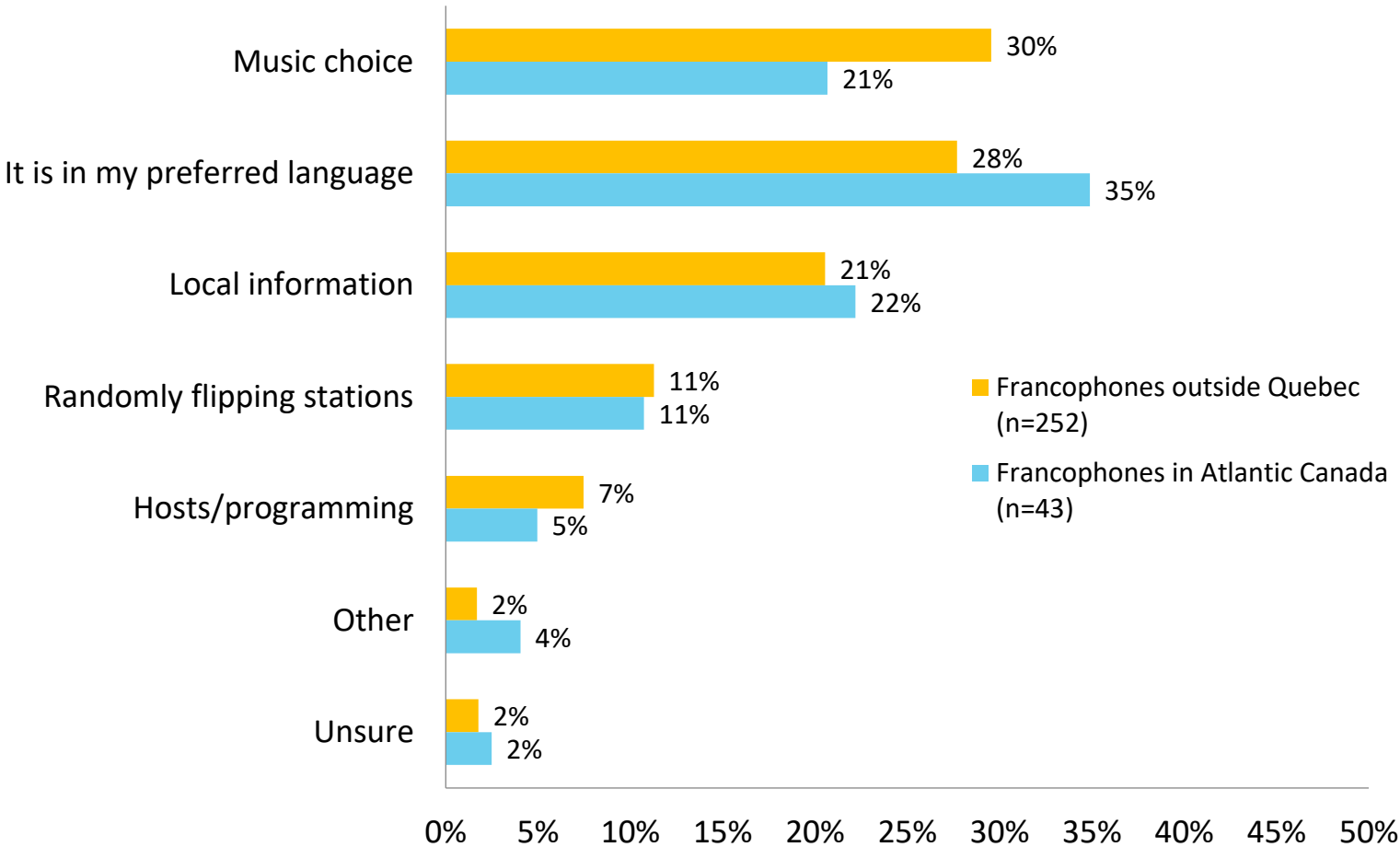
Q – In the past 12 months, have you listened to any of the following French-language local community radio stations? Please note all future reference to French-language local community radio stations refer to the following stations.
[SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=646 Francophones outside Quebec who listen to a French-language local community radio station.

About one in three Francophone Atlantic Canadians who listed to French-language local community radio say the main reason they do so is because it is in their preferred language (35%). About one in five each say they listen to local French-language community radio for local information (22%) and for music (21%).

Q – [IF LISTENS TO LOCAL COMMUNITY RADIO]
What is the main reason you listen to French-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for listening to a French-language local community radio station – FRANCOPHONES IN ATLANTIC CANADA



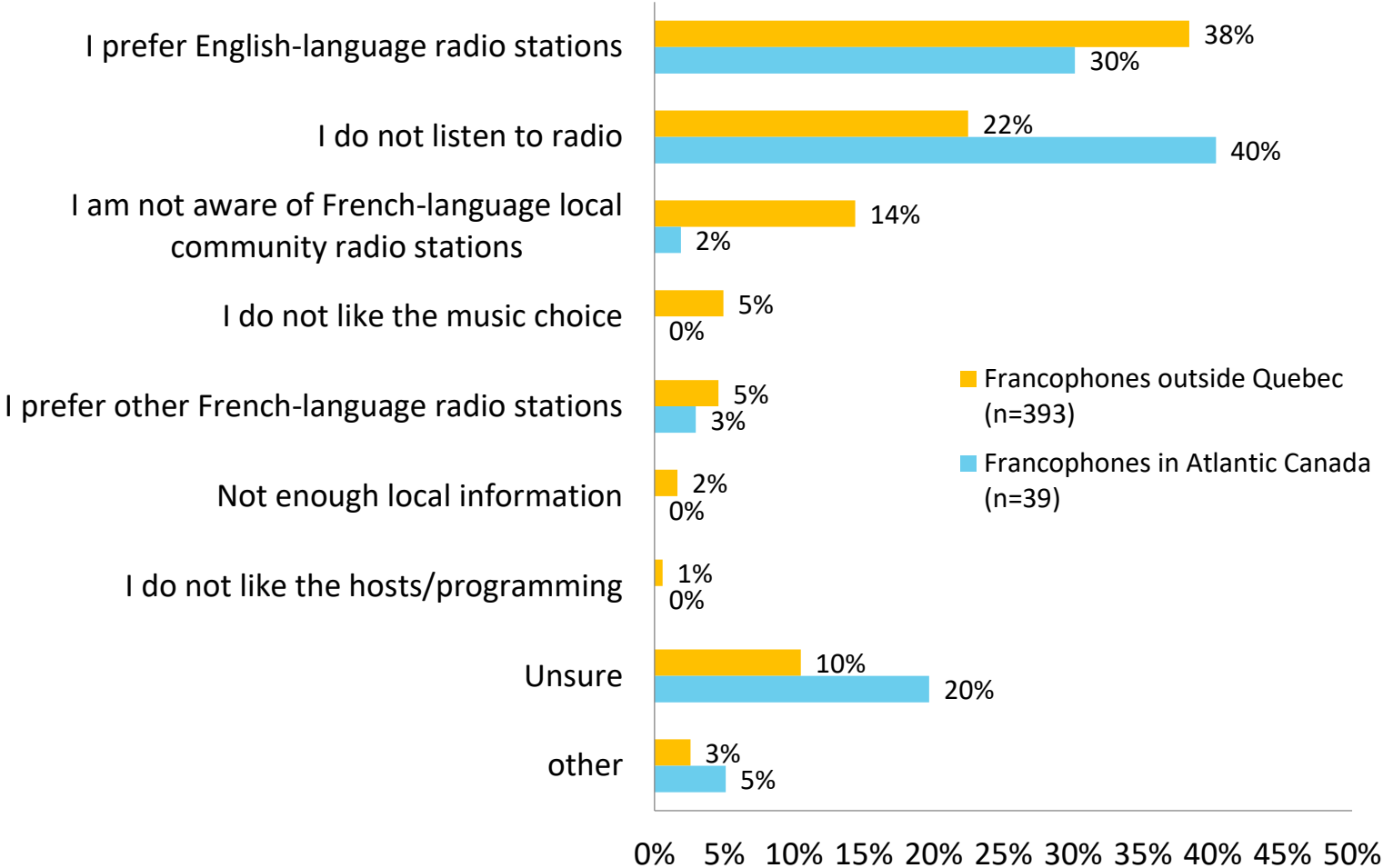
*Weighted to the true population proportion.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=252 Francophones outside Quebec who listen to a French-language local community radio station.

When Francophone Atlantic Canadians who do not listen to French-language local community radio are asked why this is the case, two in five say they do not listen to radio (40%) and three in ten say they prefer English-language radio stations (30%). Twenty percent of Francophone Atlantic Canadians say they are unsure.

Q – [IF DOES NOT LISTEN TO LOCAL COMMUNITY RADIO] What is the main reason you do not listen to French-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for not listening to a French-language local community radio station – FRANCOPHONES IN ATLANTIC CANADA



*Weighted to the true population proportion.

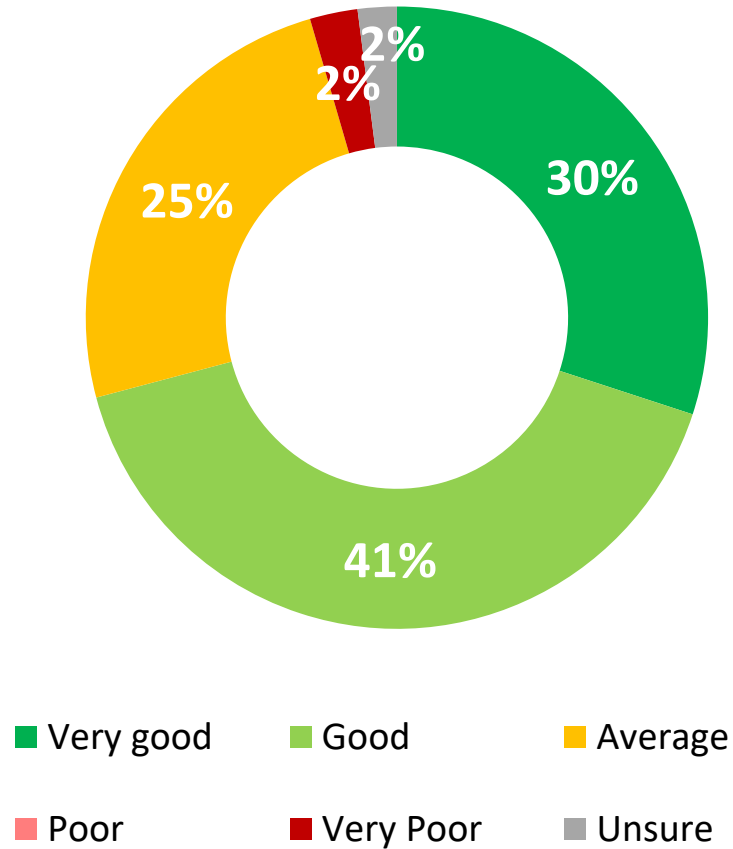
Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=393 Francophones outside Quebec who do not listen to a French-language local community radio station.



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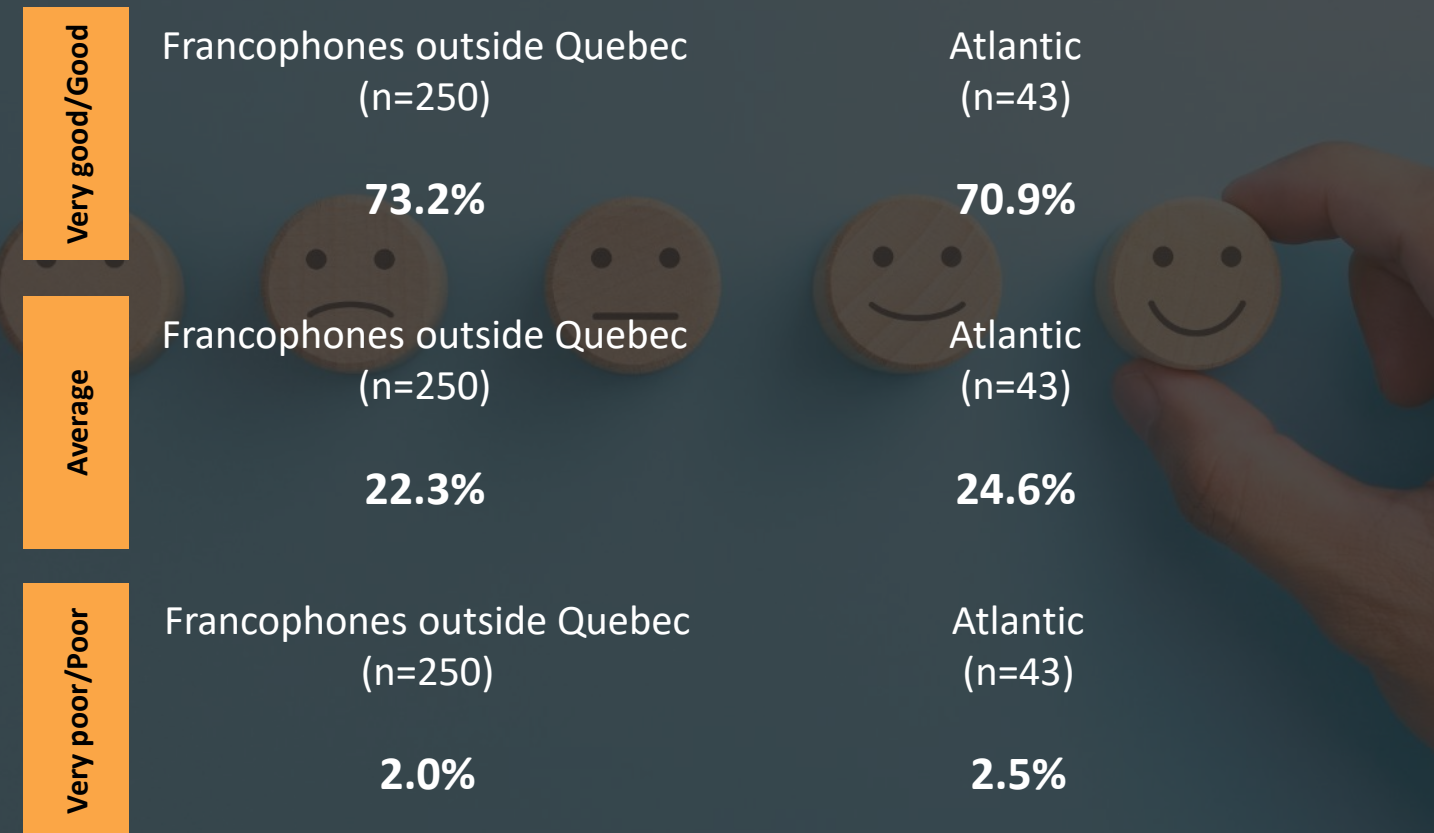
FRANCOPHONES IN ATLANTIC CANADA



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – [IF LISTENS TO LOCAL COMMUNITY RADIO – ANY OF 1-5 in Q1]
Do you believe that French-language local community radio stations do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?

Job done by local community radio stations at adapting to the needs and reflect realities of the community – FRANCOPHONES IN ATLANTIC CANADA



Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=250 Francophones in outside Quebec who listen to a French-language local community radio station.



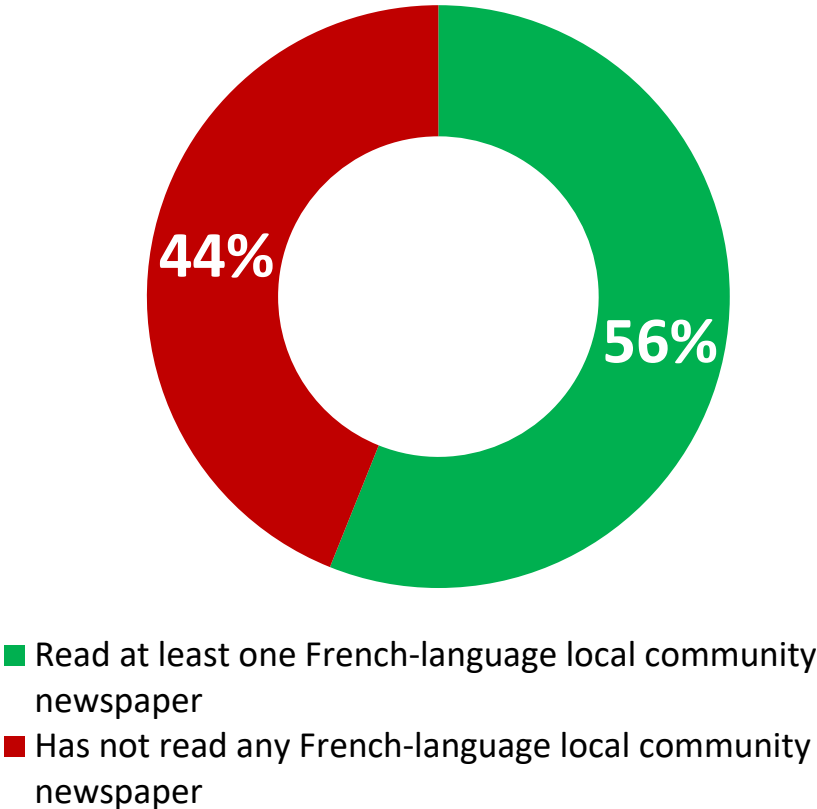
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A person wearing a green sweater is sitting at a round wooden table, reading a newspaper. A white cup of coffee sits on the table to the right. The scene is dimly lit, with a dark blue overlay on the right side of the image.

Awareness – Newspapers (Atlantic Canada)

Francophones in Atlantic Canada
(n=96)



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Reading local community newspapers - FRANCOPHONES

Francophones Outside Quebec (overall)

| Read at least one French-language local community newspaper | Outside Quebec (n=660) | Ontario (n=348) | West (n=216) | | |
|---|------------------------|-----------------|------------------|------------------|-----------------|
| | 45.4% | 44.3% | 33.5% | | |
| | Men (n=361) | Women (n=299) | 18 to 34 (n=168) | 35 to 54 (n=260) | 55 plus (n=232) |
| 54.7% | 36.4% | 59.1% | 45.4% | 36.3% | |
| Has not read any French-language local community newspaper | Outside Quebec (n=660) | Ontario (n=348) | West (n=216) | | |
| | 54.6% | 55.7% | 66.5% | | |
| | Men (n=361) | Women (n=299) | 18 to 34 (n=168) | 35 to 54 (n=260) | 55 plus (n=232) |
| 45.3% | 63.6% | 40.9% | 54.6% | 63.7% | |

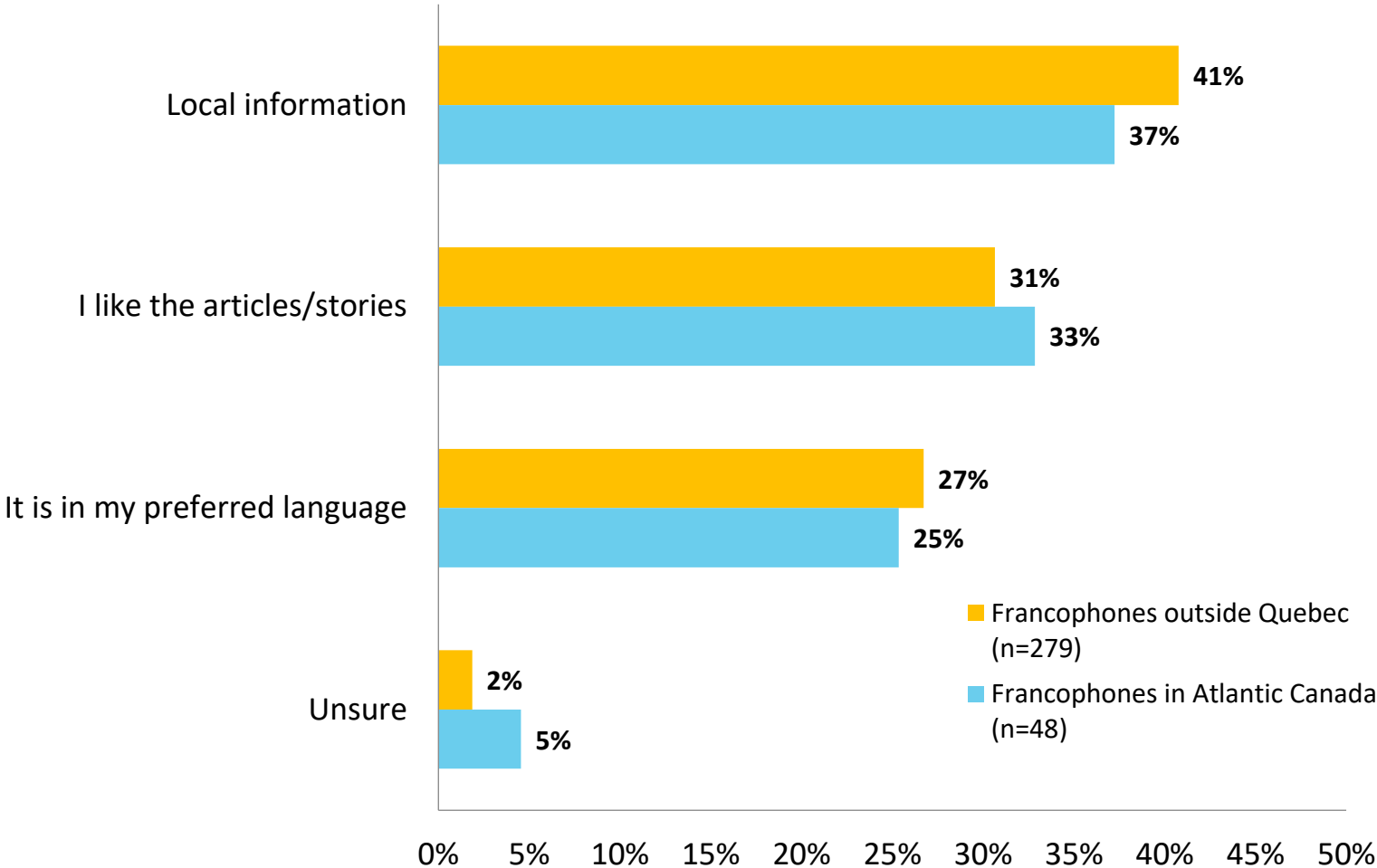
Q – In the past 12 months, have you read any of the following French-language local community newspapers? Please note all future reference to English-language local community newspapers refer to the following newspapers.
[SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=660 Francophones outside Quebec.

About one in three Francophone Atlantic Canadians who read OLMC newspapers in the past 12 months say the main reason they do so is because of local information (37%). One in three say they read OLMC newspapers because they like the articles (33%) and one in four say because it is in their preferred language (25%).

Q – [IF READS LOCAL COMMUNITY NEWSPAPERS]
What is the main reason you read French-language local community newspapers? [RANDOMIZE]

Main reasons for reading a French-language local community newspaper – FRANCOPHONES IN ATLANTIC CANADA



*Weighted to the true population proportion.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=279 Francophones outside Quebec who read a French-language local community newspaper.



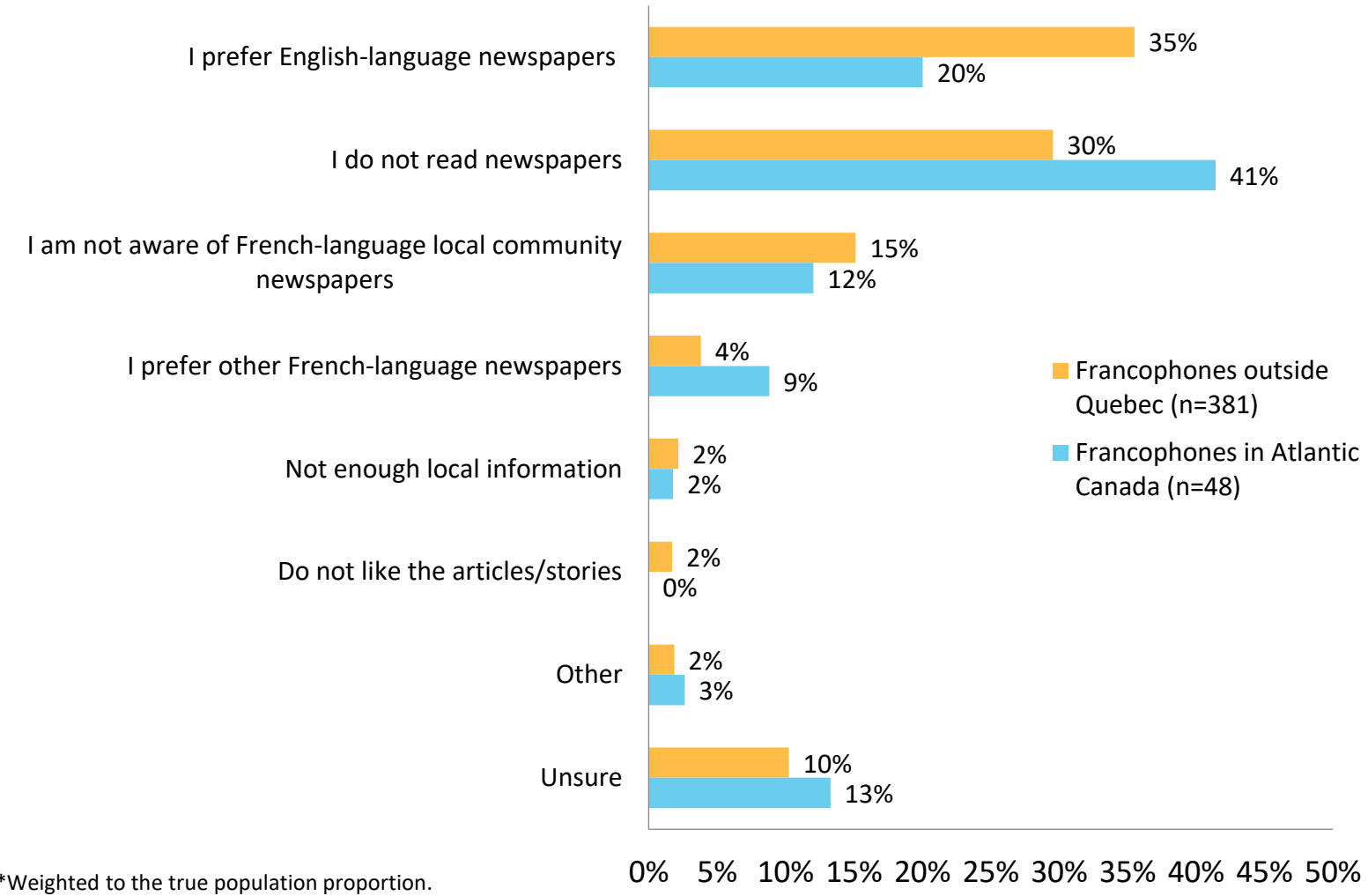
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When Francophone Atlantic Canadians who do not read OLMC newspapers are asked why this is the case, two in five say they do not read newspapers (41%) and one in five say they prefer English-language newspapers (20%).

Q – [IF DOES NOT READ LOCAL COMMUNITY NEWSPAPERS] What is the main reason you do not read French-language local community newspapers? [RANDOMIZE]

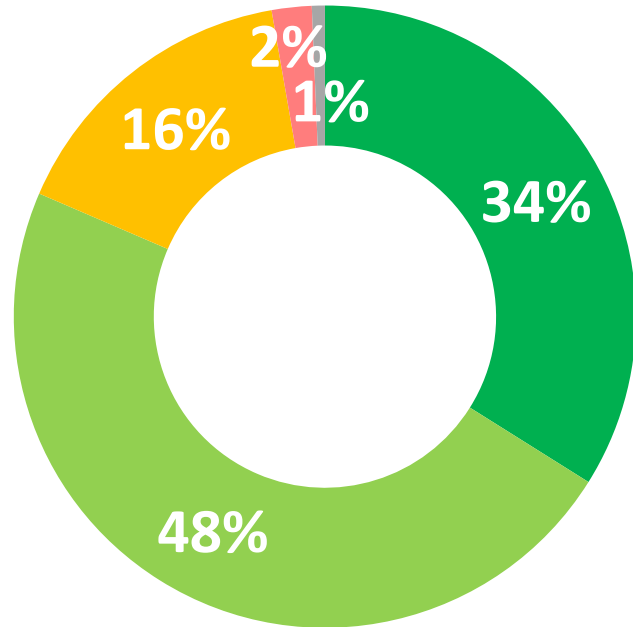
Main reasons for not reading a French-language local community newspaper – FRANCOPHONES IN ATLANTIC CANADA



*Weighted to the true population proportion.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=381 Francophones outside Quebec who do not read a French-language local community newspaper.

FRANCOPHONES IN ATLANTIC CANADA



■ Very good ■ Good ■ Average
■ Poor ■ Very Poor ■ Unsure

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Job done by local community newspapers at adapting to the needs and reflect realities of the community – FRANCOPHONES IN ATLANTIC CANADA

Very good/Good
Average
Very poor/Poor

Francophones outside Quebec
(n=275)

76.4%

Francophones outside Quebec
(n=275)

19.6%

Francophones outside Quebec
(n=275)

2.2%

Atlantic Canada
(n=47)

81.5%

Atlantic Canada
(n=47)

15.8%

Atlantic Canada
(n=47)

2.1%

Q – [IF READS LOCAL COMMUNITY NEWSPAPERS – ANY OF 1-26 IN Q5]
Do you believe that French-language local community newspapers do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=275 Francophones outside Quebec who read a French-language local community newspaper.




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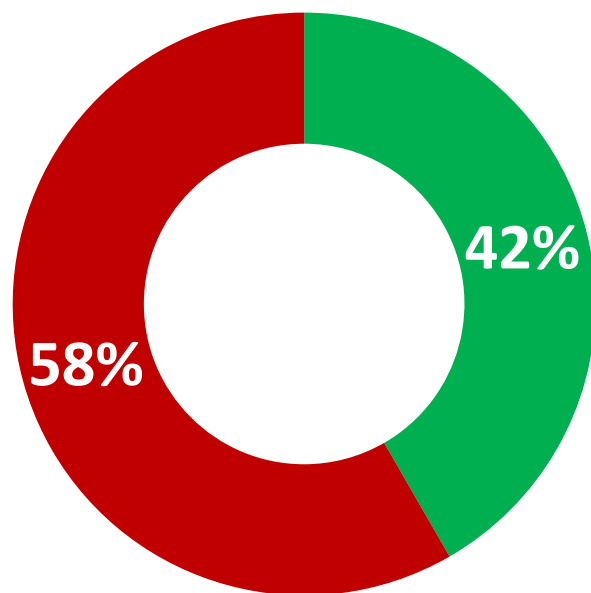
Francophones in Ontario

This section focuses on awareness and views of French-language local community radio stations and newspapers of Ontario for 351 Francophone residents of Ontario.

A professional broadcast microphone, likely a Neumann U87, is the central focus of the image. It is a large, silver, cylindrical condenser microphone with a fine mesh grille. The microphone is mounted on a black boom arm, which is suspended by a shock mount. The background is a blurred radio studio, showing various pieces of equipment, including a rack of modules with red and green indicator lights, and a desk with papers and other gear. The overall lighting is dim, creating a professional and focused atmosphere. The text 'Awareness – Radio stations (Francophones in Ontario)' is overlaid on the left side of the image, with 'Awareness' in orange and the rest in white.

Awareness – Radio stations (Francophones in Ontario)

Francophones in Ontario
(n=348)



- Listened to at least one French-language local community radio station
- Has not listened to at any French-language local community radio station

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Listening to local community radio stations - FRANCOPHONES

Francophones outside Quebec (overall)

| Listened to at least one French-language local community radio station | Outside Quebec (n=646) | Atlantic Canada (n=82) | West (n=216) | | |
|--|------------------------|------------------------|------------------|------------------|-----------------|
| | 44.0% | 59.4% | 30.2% | | |
| | Men (n=354) | Women (n=292) | 18 to 34 (n=163) | 35 to 54 (n=255) | 55 plus (n=228) |
| | 51.8% | 36.6% | 58.4% | 44.3% | 34.3% |
| Has not listened to at any French-language local community radio station | Outside Quebec (n=646) | Atlantic Canada (n=82) | West (n=216) | | |
| | 56.0% | 40.6% | 69.8% | | |
| | Men (n=354) | Women (n=292) | 18 to 34 (n=163) | 35 to 54 (n=255) | 55 plus (n=228) |
| | 48.2% | 63.4% | 41.6% | 55.7% | 65.7% |

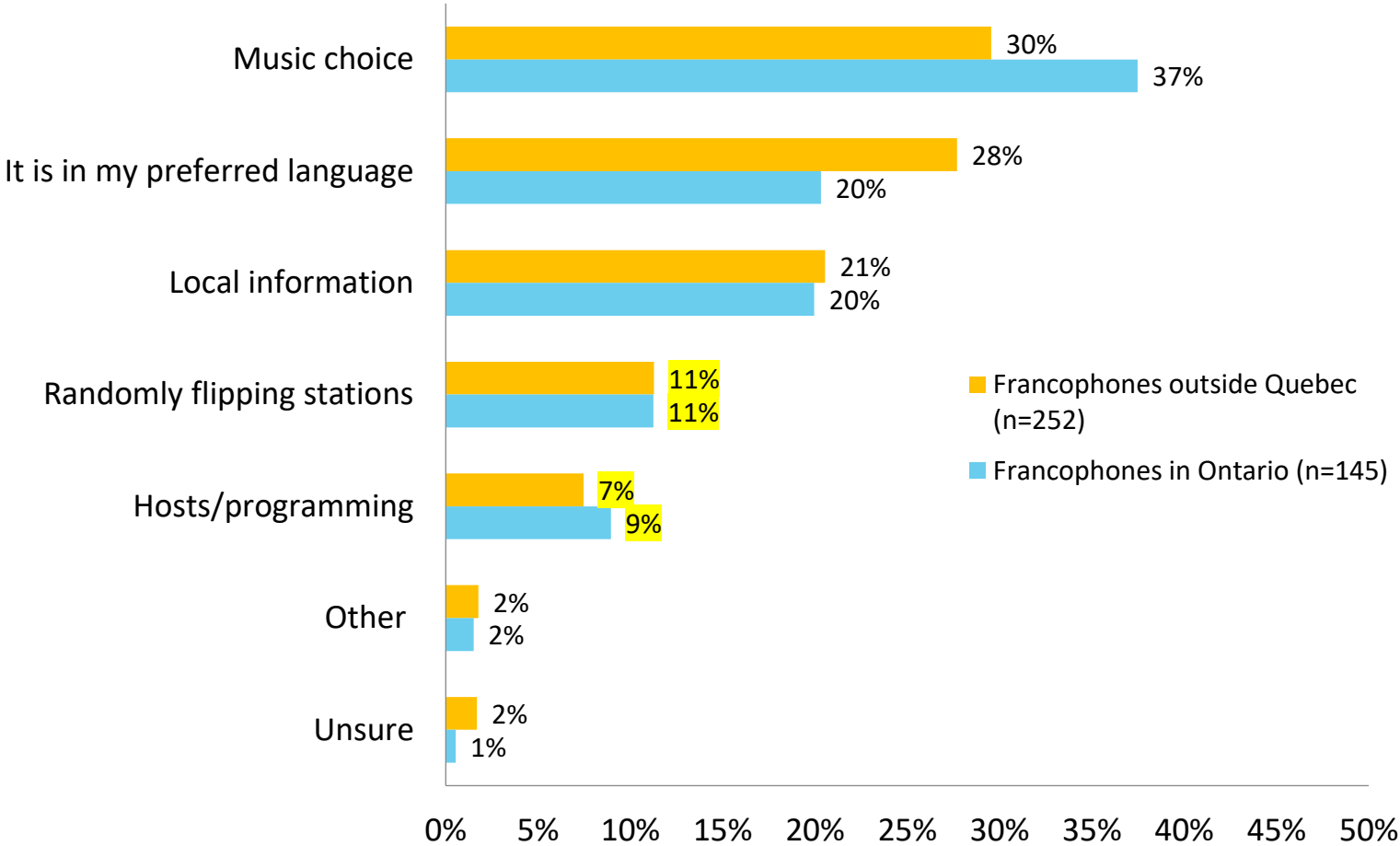
Q – In the past 12 months, have you listened to any of the following French-language local community radio stations? Please note all future reference to French-language local community radio stations refer to the following stations.
[SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=646 Francophones outside Quebec who listen to a French-language local community radio station.

Franco-Ontarians who report listening to French-Language community radio stations most frequently say their main reason for listening is the music choice (37%), followed by the station being in their preferred language (20%) and for local information (20%).

Q – [IF LISTENS TO LOCAL COMMUNITY RADIO]
What is the main reason you listen to French-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for listening to a French-language local community radio station – FRANCOPHONES IN ONTARIO



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=252 Francophones outside Quebec



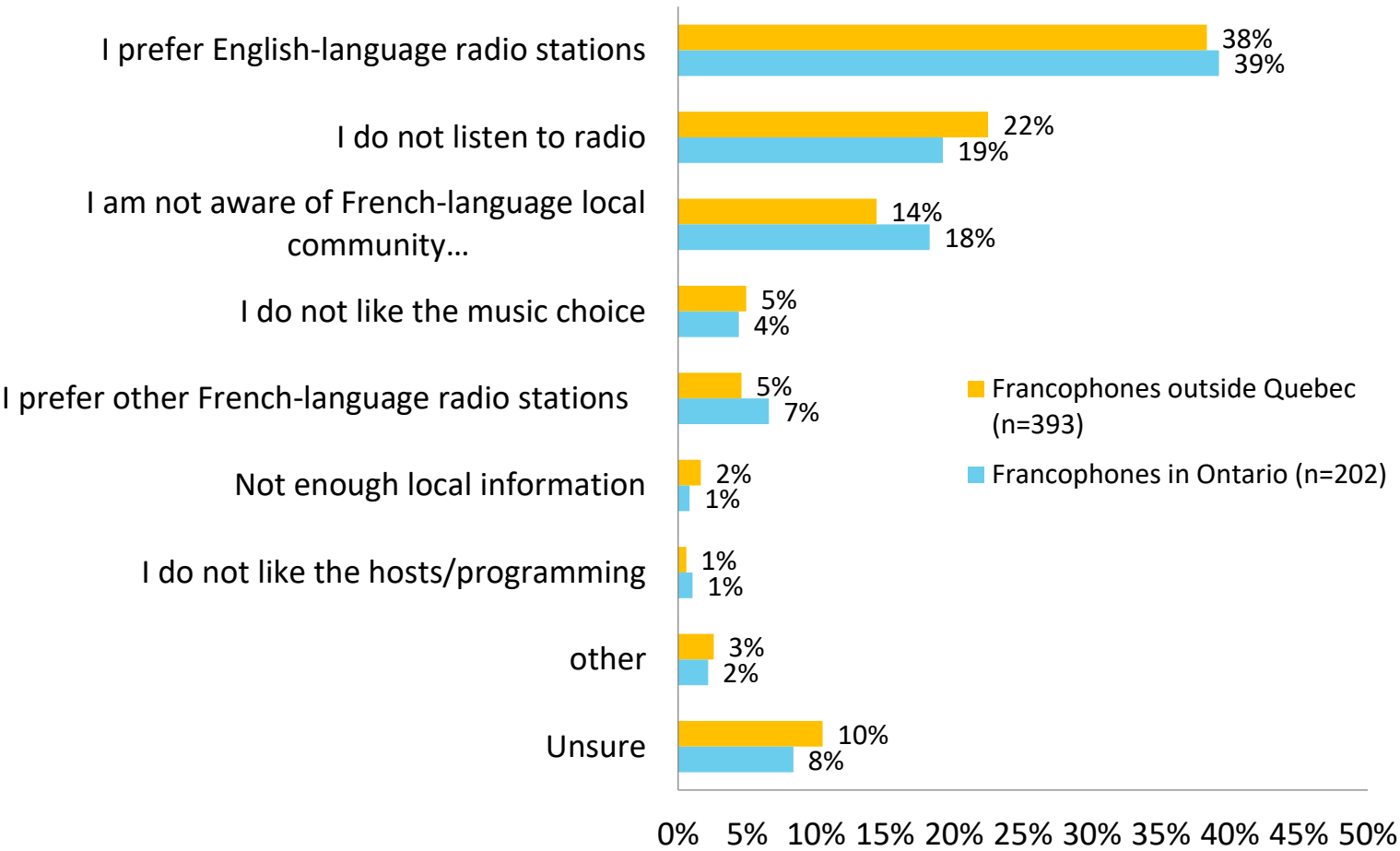
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Franco-Ontarians who report not listening to French-Language community radio stations most often say their main reason for not listening is because they prefer English-language radio stations (39%), which is consistent with other Francophones in Canada.

Q – [IF DOES NOT LISTEN TO LOCAL COMMUNITY RADIO] What is the main reason you do not listen to French-language local community radio stations? [SELECT ONE] [RANDOMIZE]

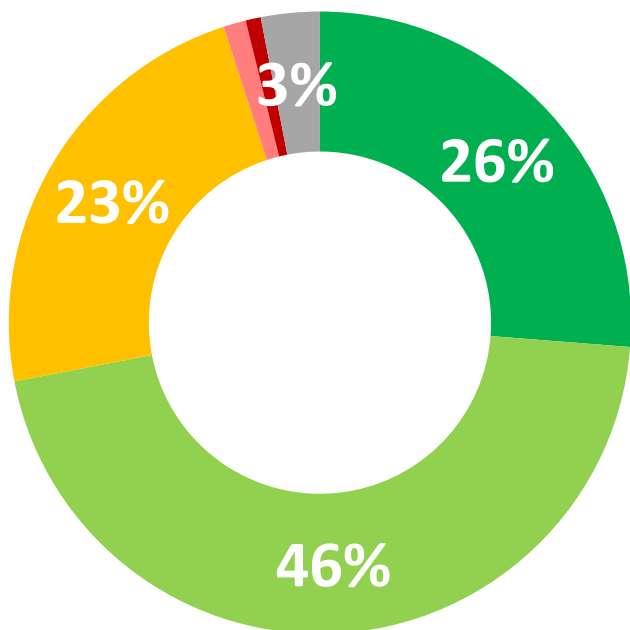
Main reasons for not listening to a French-language local community radio station – FRANCOPHONES IN ONTARIO



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=393 Francophones outside Quebec

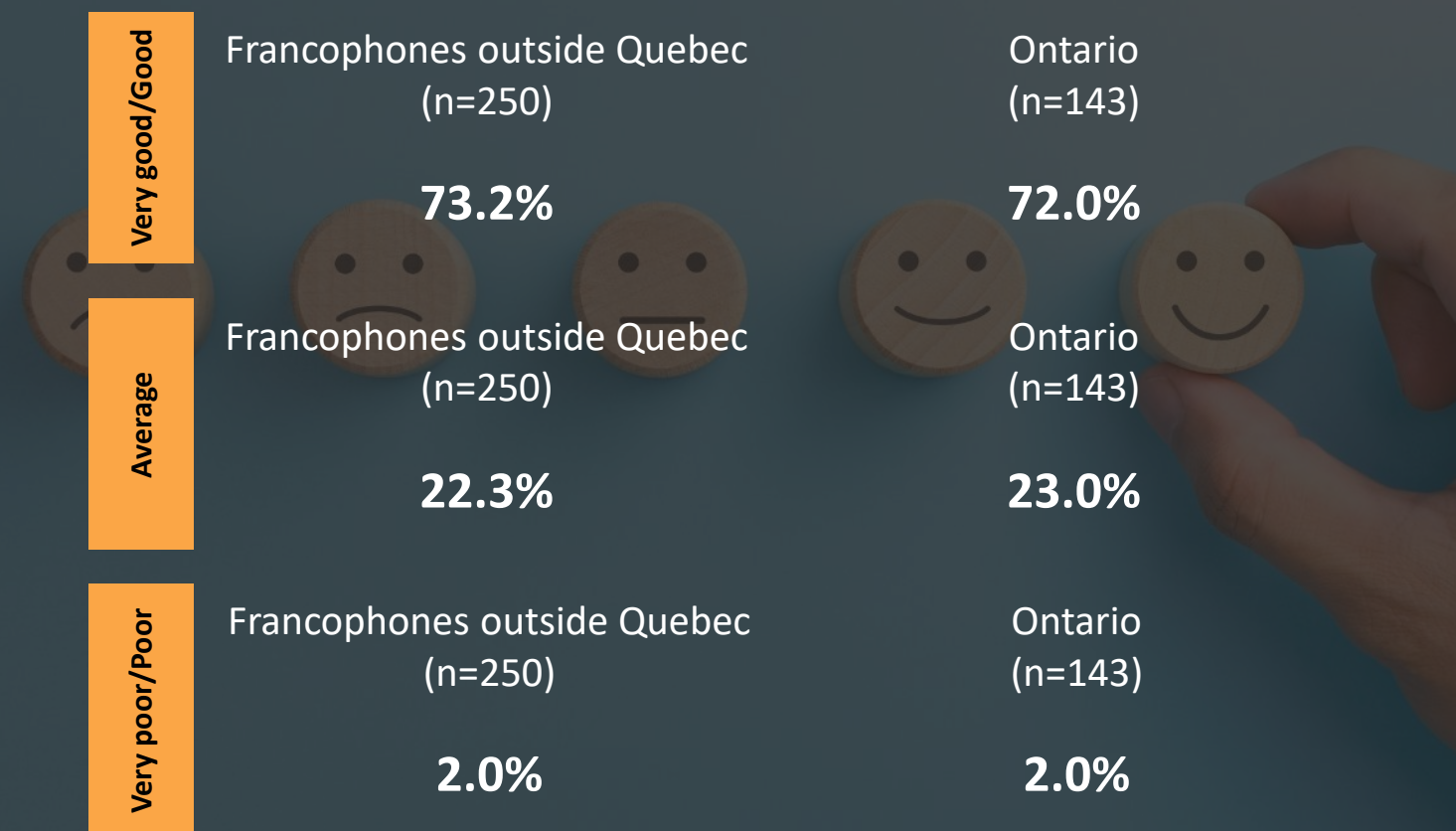
Francophones in Ontario



■ Very good ■ Good ■ Average
■ Poor ■ Very Poor ■ Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Job done by local community radio stations at adapting to the needs and reflect realities of the community – FRANCOPHONES IN ONTARIO



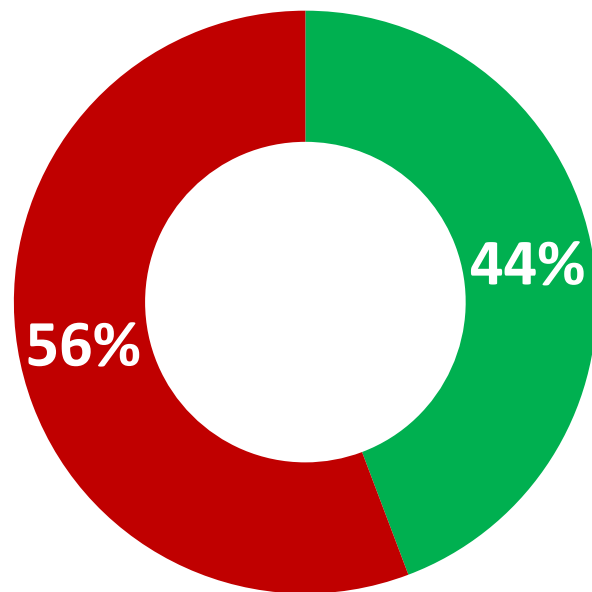
Q – [IF LISTENS TO LOCAL COMMUNITY RADIO – ANY OF 1-5 in Q1]
Do you believe that French-language local community radio stations do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=250 Francophones outside Quebec.

A person wearing a green sweater is sitting at a round wooden table, reading a newspaper. A white cup of coffee sits on the table to the right. The scene is dimly lit, and the image has a dark overlay. A solid blue triangle is in the top right corner, and a solid blue vertical bar is on the right edge.

Awareness – Newspapers (Francophones in Ontario)

Francophones in Ontario
(n=348)



- Read at least one French-language local community newspaper
- Has not read any French-language local community newspaper

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Reading local community newspapers - FRANCOPHONES

Francophones Outside Quebec (overall)

| Read at least one French-language local community newspaper | Outside Quebec (n=660) | Atlantic Canada (n=96) | West (n=216) | | |
|---|------------------------|------------------------|------------------|------------------|-----------------|
| | 45.4% | 56.1% | 33.5% | | |
| | Men (n=361) | Women (n=299) | 18 to 34 (n=168) | 35 to 54 (n=260) | 55 plus (n=232) |
| Has not read any French-language local community newspaper | 54.7% | 36.4% | 59.1% | 45.4% | 36.3% |
| | Outside Quebec (n=660) | Atlantic Canada (n=96) | West (n=216) | | |
| | 54.6% | 43.9% | 66.5% | | |
| Has not read any French-language local community newspaper | Men (n=361) | Women (n=299) | 18 to 34 (n=168) | 35 to 54 (n=260) | 55 plus (n=232) |
| | 45.3% | 63.6% | 40.9% | 54.6% | 63.7% |

Q – In the past 12 months, have you read any of the following French-language local community newspapers? Please note all future reference to English-language local community newspapers refer to the following newspapers.
[SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=660 Francophones outside Quebec

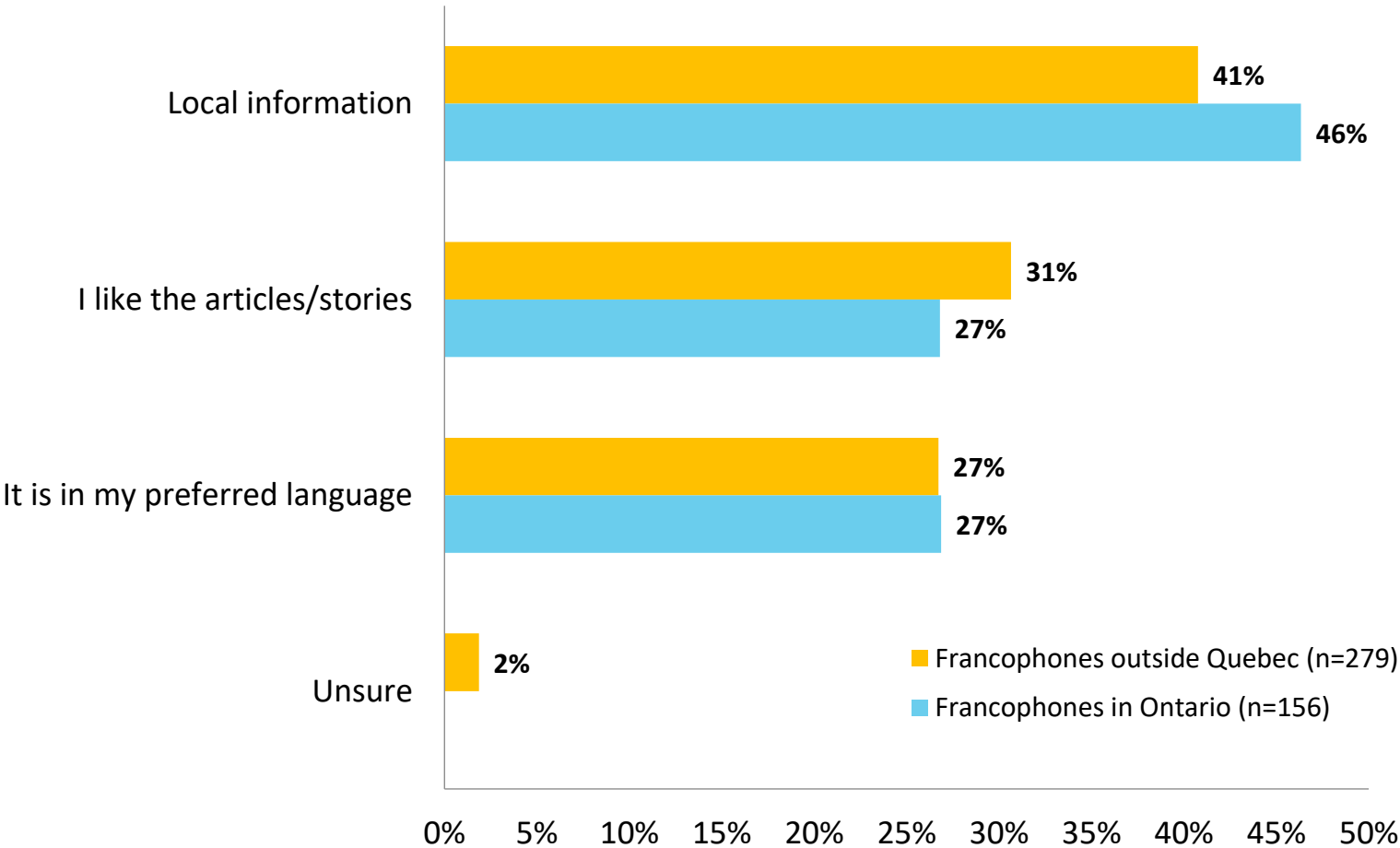


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de langues officielles
en situation minoritaire
of Official Language Minority
Community Media



Franco-Ontarians who report reading local community newspapers most often say that their main reason for reading is because of local information (46%).

Main reasons for reading a French-language local community newspaper – FRANCOPHONES IN ONTARIO



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – [IF READS LOCAL COMMUNITY NEWSPAPER] What is the main reason you read French-language local community newspapers? [RANDOMIZE]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=279 Francophones outside Quebec who read a French-language local community newspaper.

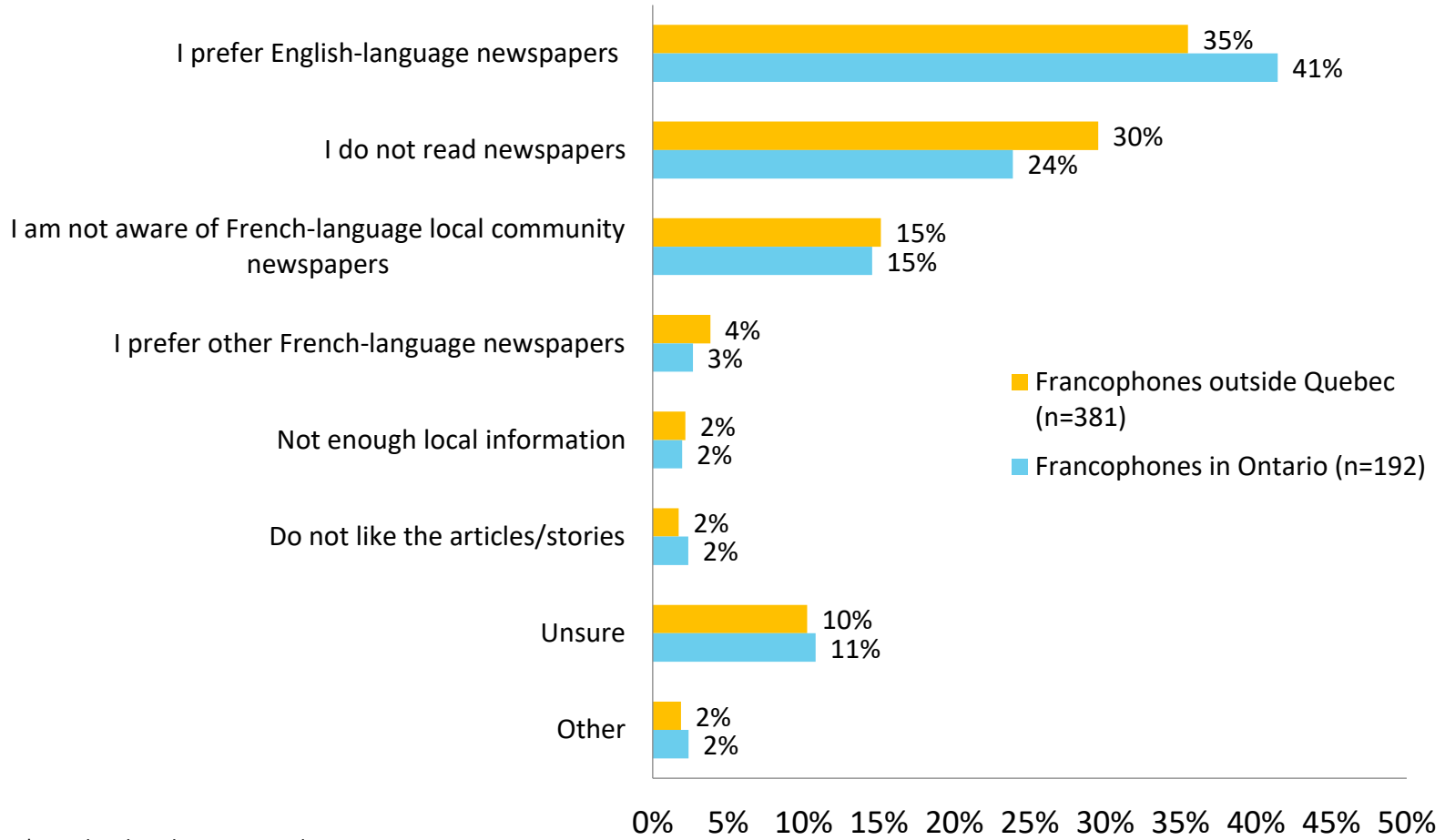


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Community Media



Main reasons for not reading a French-language local community newspaper – FRANCOPHONES IN ONTARIO

The top reason for Franco-Ontarians who report not reading French-language local community newspapers in the past 12 months is because they prefer English newspapers (41%), followed by not reading newspapers in general (24%), which is consistent with other Francophone Canadians outside Quebec.



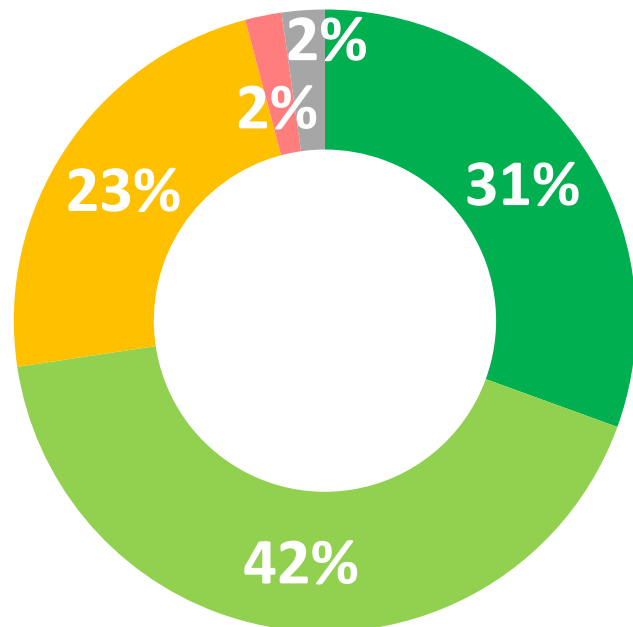
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – [IF DOES NOT READ LOCAL COMMUNITY NEWSPAPER] What is the main reason you do not read French-language local community newspapers? [RANDOMIZE]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=381 Francophones outside Quebec who do not read a French-language local community newspaper.



Francophones in Ontario

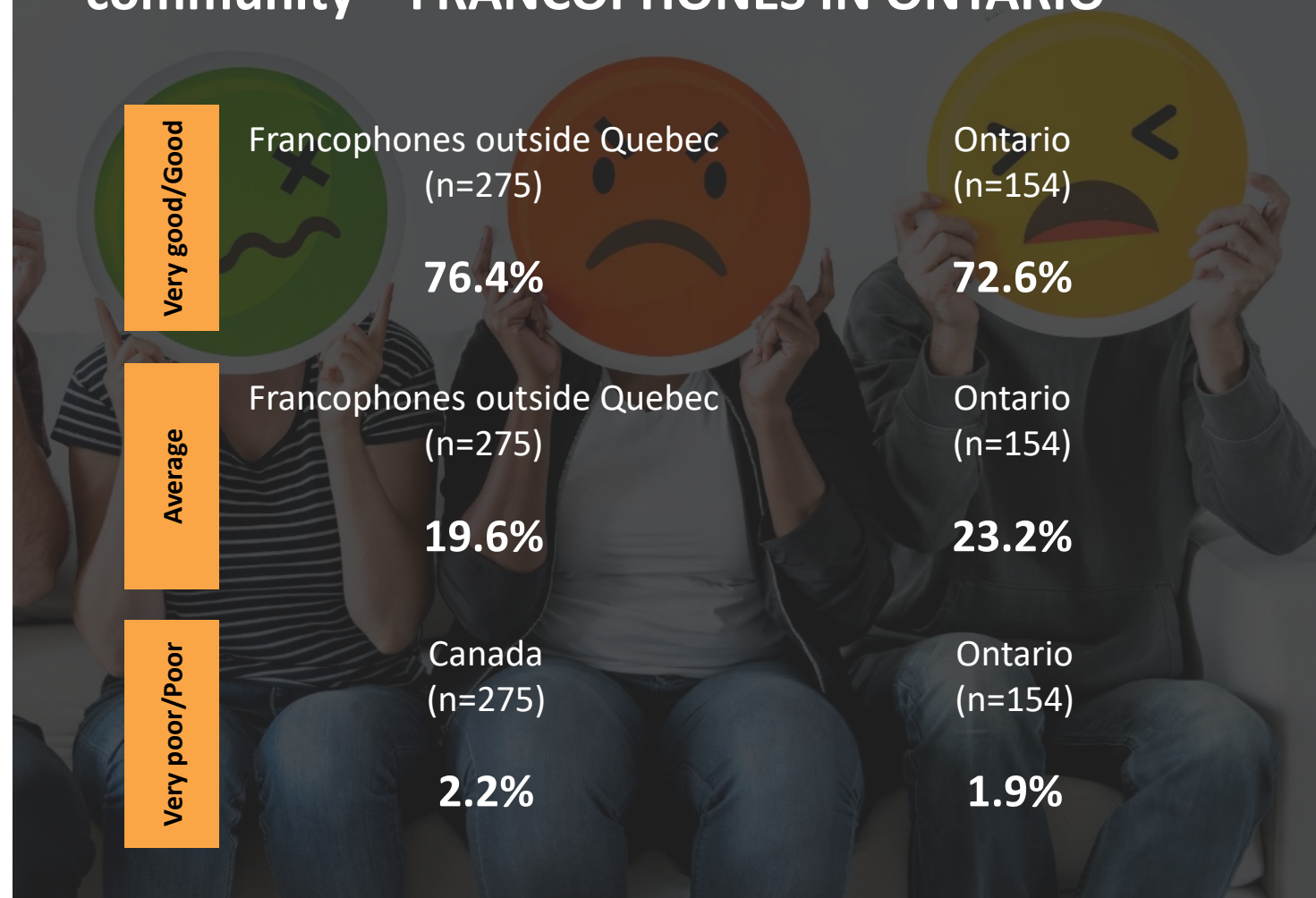


Very good Good Average
Poor Very Poor Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – [IF READS LOCAL COMMUNITY NEWSPAPERS] Do you believe that French-language local community newspapers do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?


Job done by local community newspapers at adapting to the needs and reflect realities of the community – FRANCOPHONES IN ONTARIO



Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=275 Francophones outside Quebec who read a French-language local community newspaper.

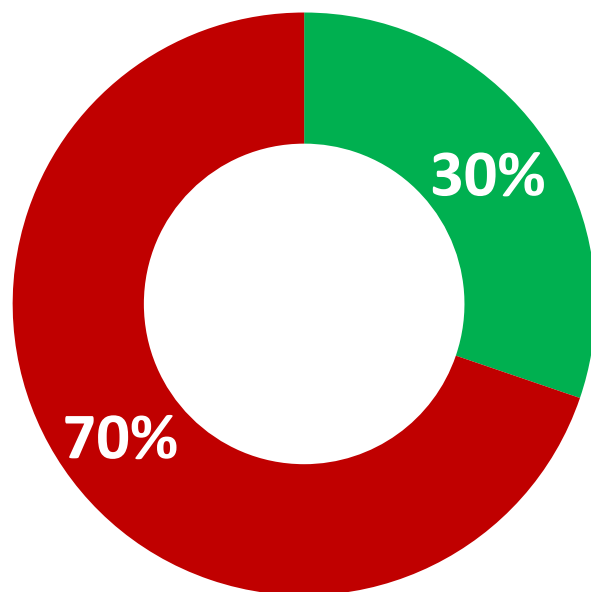
Francophones in Western Canada

This section focuses on awareness and views of French-language local community radio stations and newspapers in western Canada for 218 Francophones in Western Canada, including 97 from British Columbia, 88 from Alberta, 17 from Manitoba and 16 from Saskatchewan.

A professional broadcast microphone, likely a Shure SM7B, is the central focus of the image. It is mounted on a boom arm and positioned in a radio studio. The background is dark and out of focus, showing various pieces of studio equipment, including a rack of gear with glowing red and green indicator lights. The overall atmosphere is professional and focused on audio production.

Awareness – Radio stations (Francophones in Western Canada)

Francophones in Western Canada
(n=216)



- Listened to at least one French-language local community radio station
- Has not listened to any French-language local community radio station

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Listening to local community radio stations - FRANCOPHONES

Francophones outside Quebec (overall)

| Listened to at least one French-language local community radio station | Outside Quebec (n=646) | Atlantic Canada (n=82) | Ontario (n=348) | | |
|--|------------------------|------------------------|------------------|------------------|-----------------|
| | 44.0% | 59.4% | 41.7% | | |
| | Men (n=354) | Women (n=292) | 18 to 34 (n=163) | 35 to 54 (n=255) | 55 plus (n=228) |
| Has not listened to any French-language local community radio station | 51.8% | 36.6% | 58.4% | 44.3% | 34.3% |
| | Outside Quebec (n=646) | Atlantic Canada (n=82) | West (n=348) | | |
| | 56.0% | 40.6% | 58.3% | | |
| | Men (n=354) | Women (n=292) | 18 to 34 (n=163) | 35 to 54 (n=255) | 55 plus (n=228) |
| | 48.2% | 63.4% | 41.6% | 55.7% | 65.7% |
| | | | | | |

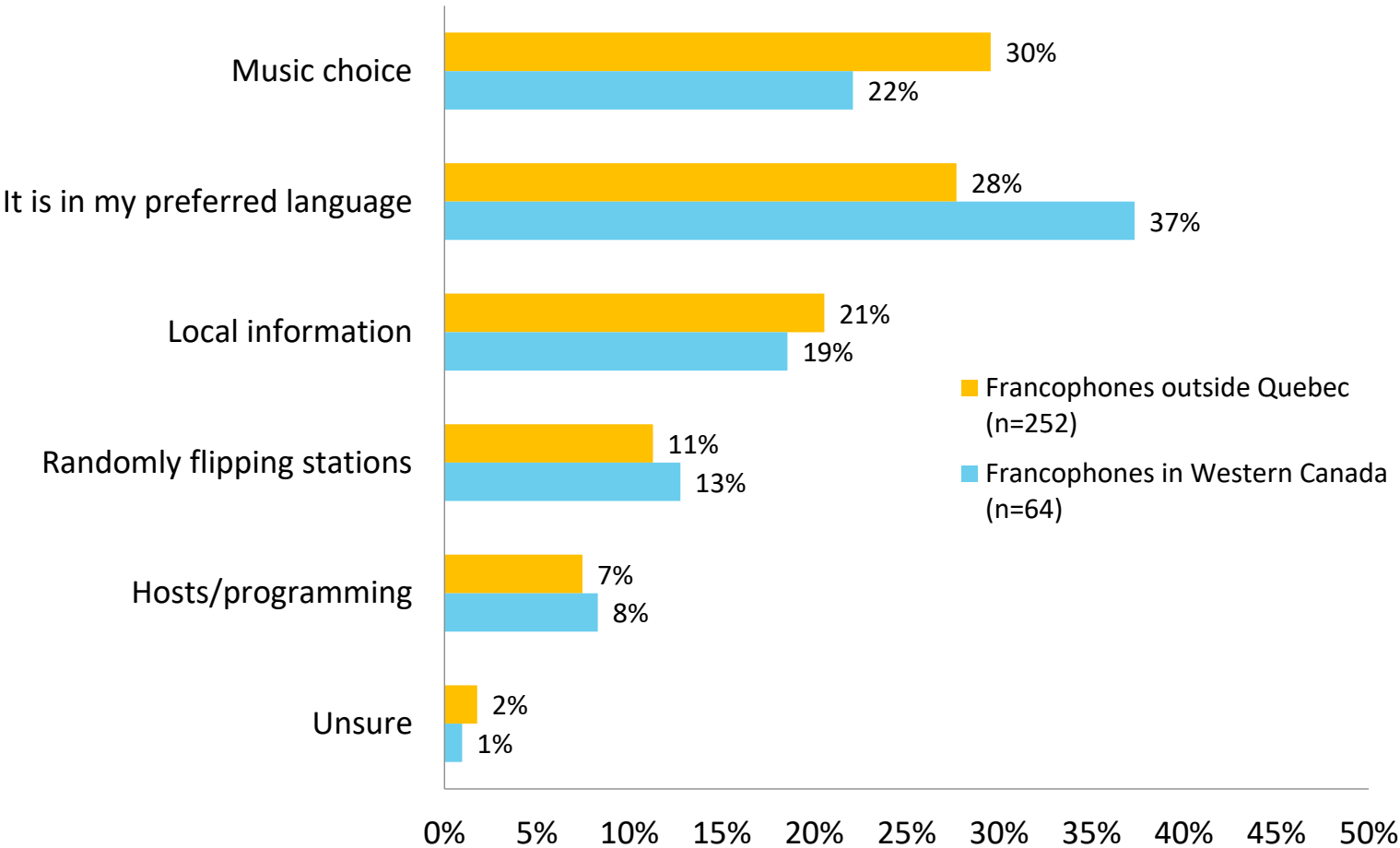
Q – In the past 12 months, have you listened to any of the following French-language local community radio stations? Please note all future reference to French-language local community radio stations refer to the following stations.
[SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=646 Francophones outside Quebec

Francophones from western Canada who report listening in the past 12 months to a French-language community radio station most frequently mention the main reason for tuning in is that it is in their preferred language (37%).

Q – [IF LISTENS TO LOCAL COMMUNITY RADIO]
What is the main reason you listen to French-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for listening to a French-language local community radio station – FRANCOPHONES IN WESTERN CANADA



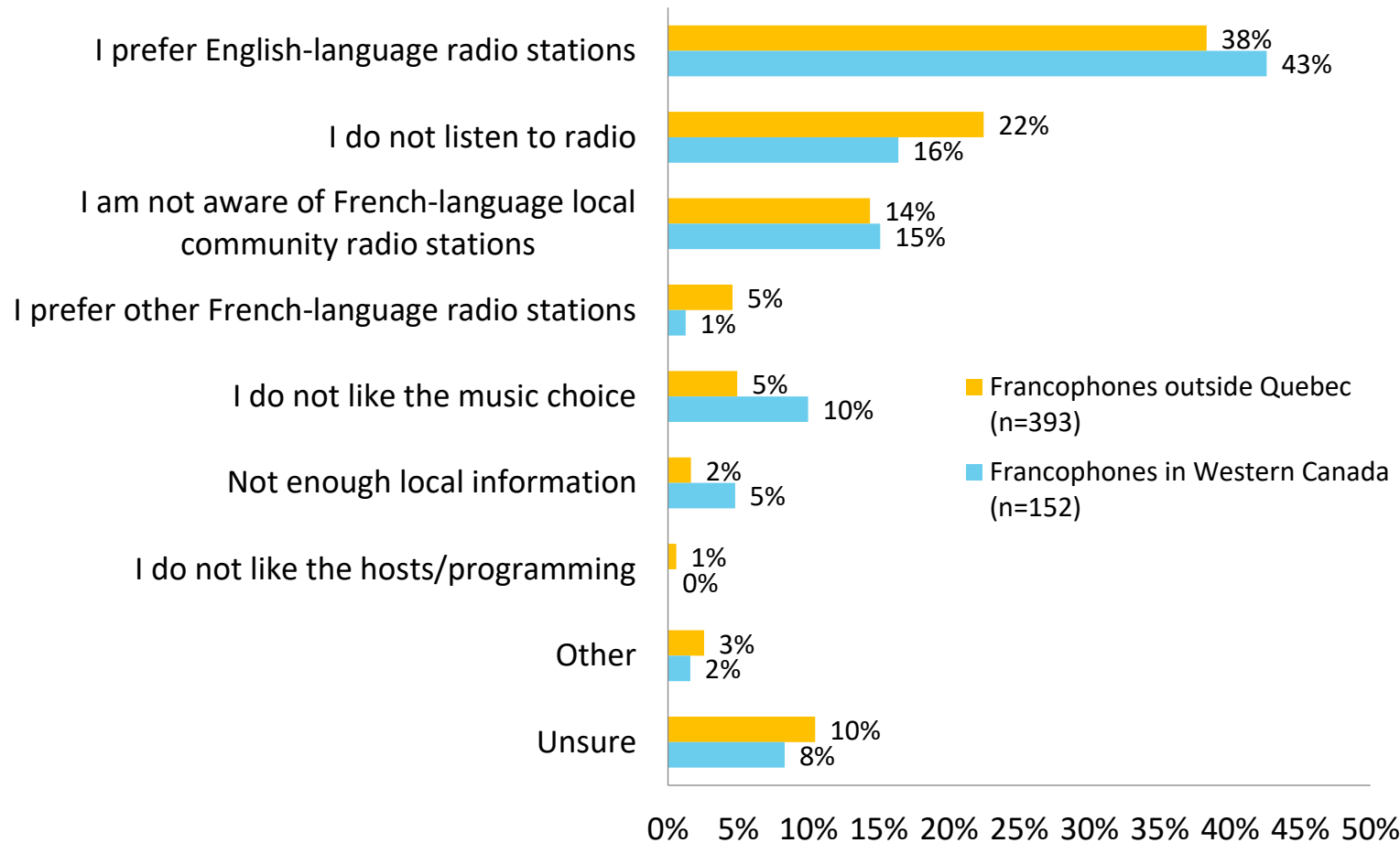
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=252 Francophones outside Quebec who listen to a French-language local community radio station.

Francophones in western Canada who report not listening to local community radio stations most often say the main reason for not listening is that they prefer English-language radio stations (43%).

Q – [IF DOES NOT LISTEN TO LOCAL COMMUNITY RADIO] What is the main reason you do not listen to French-language local community radio stations? [SELECT ONE] [RANDOMIZE]

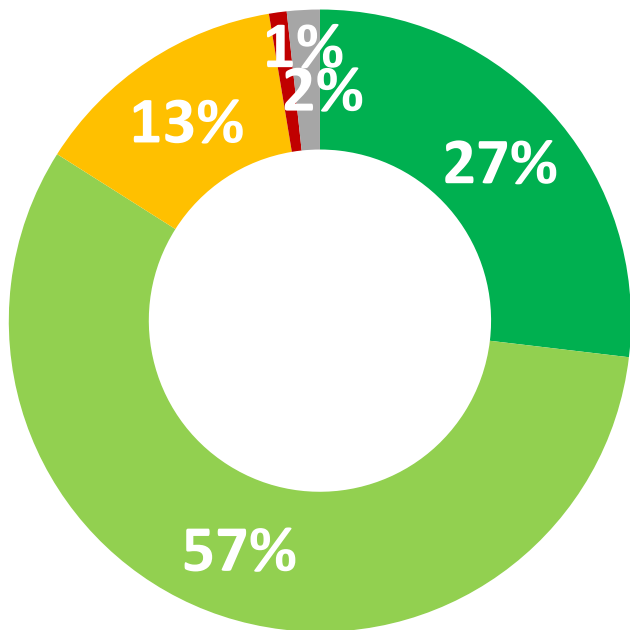
Main reasons for not listening to a French-language local community radio station – FRANCOPHONES IN WESTERN CANADA



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=393 Francophones outside Quebec who do not listen to a French-language local community radio station

Francophones in Western Canada

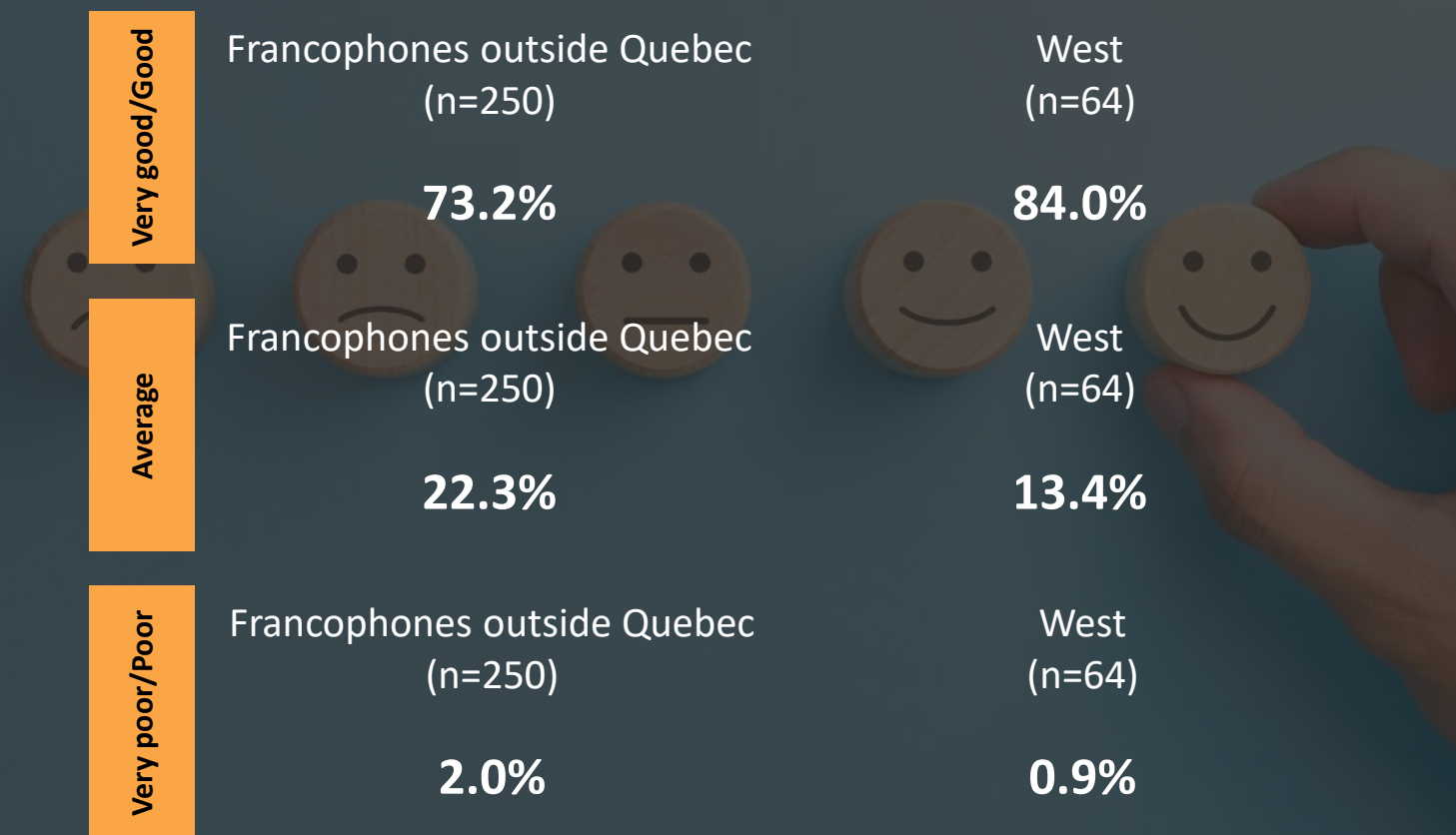


Very good Good Average
Poor Very Poor Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – [IF LISTENS TO LOCAL COMMUNITY RADIO] Do you believe that French-language local community radio stations do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?

Job done by local community radio stations at adapting to the needs and reflect realities of the community – FRANCOPHONES IN WESTERN CANADA

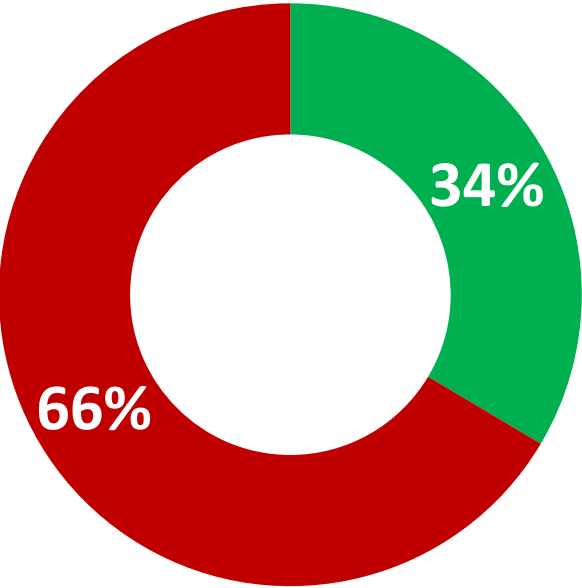


Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=250 Francophones outside Quebec who listen to a French-language local community radio station.

A person wearing a green sweater is sitting at a round wooden table, reading a newspaper. A white cup of coffee sits on the table to the right. The scene is dimly lit, with a dark blue overlay on the right side of the image.

Awareness – Newspapers (Francophones in Western Canada)

Francophones in Western Canada
(n=216)



- Read at least one French-language local community newspaper
- Has not read any French-language local community newspaper

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Reading local community newspapers - FRANCOPHONES

Francophones Outside Quebec (overall)

| Read at least one French-language local community newspaper | Outside Quebec (n=660) | Atlantic Canada (n=96) | Ontario (n=348) | | |
|---|------------------------|------------------------|------------------|------------------|-----------------|
| | 45.4% | 56.1% | 44.3% | | |
| | Men (n=361) | Women (n=299) | 18 to 34 (n=168) | 35 to 54 (n=260) | 55 plus (n=232) |
| | 54.7% | 36.4% | 59.1% | 45.4% | 36.3% |
| Has not read any French-language local community newspaper | Outside Quebec (n=660) | Atlantic Canada (n=96) | Ontario (n=348) | | |
| | 54.6% | 43.9% | 55.7% | | |
| | Men (n=361) | Women (n=299) | 18 to 34 (n=168) | 35 to 54 (n=260) | 55 plus (n=232) |
| | 45.3% | 63.6% | 40.9% | 54.6% | 63.7% |

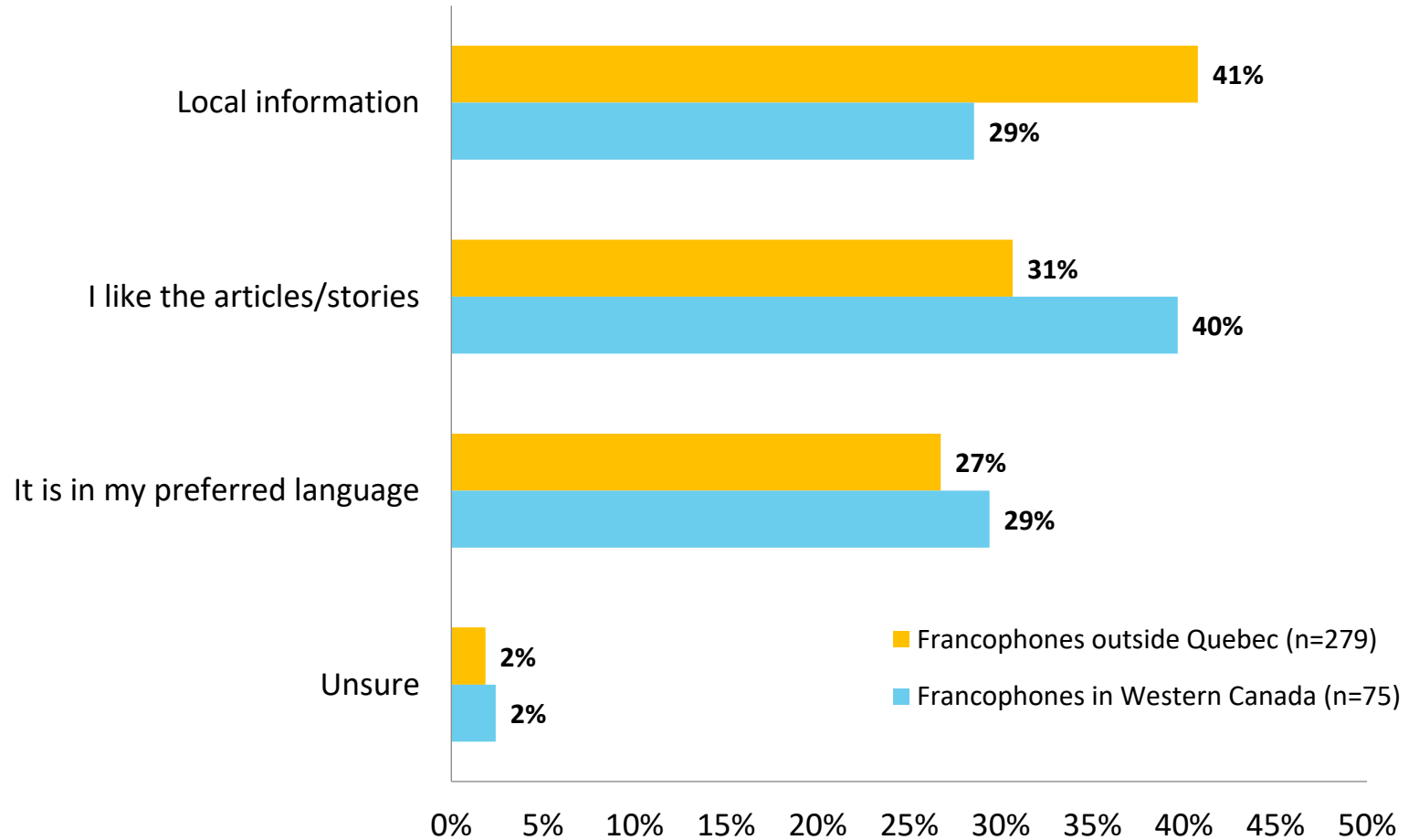
Q – In the past 12 months, have you read any of the following French-language local community newspapers? Please note all future reference to English-language local community newspapers refer to the following newspapers.
[SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=660 Francophones outside Quebec.

Francophones in Western Canada who report reading French-language local community newspapers most often say they do so because they like the articles/stories (41%).

Q – [IF READS LOCAL COMMUNITY NEWSPAPER] What is the main reason you read French-language local community newspapers? [RANDOMIZE]

Main reasons for reading a French-language local community newspaper – FRANCOPHONES IN WESTERN CANADA



Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=279 Francophones outside Quebec



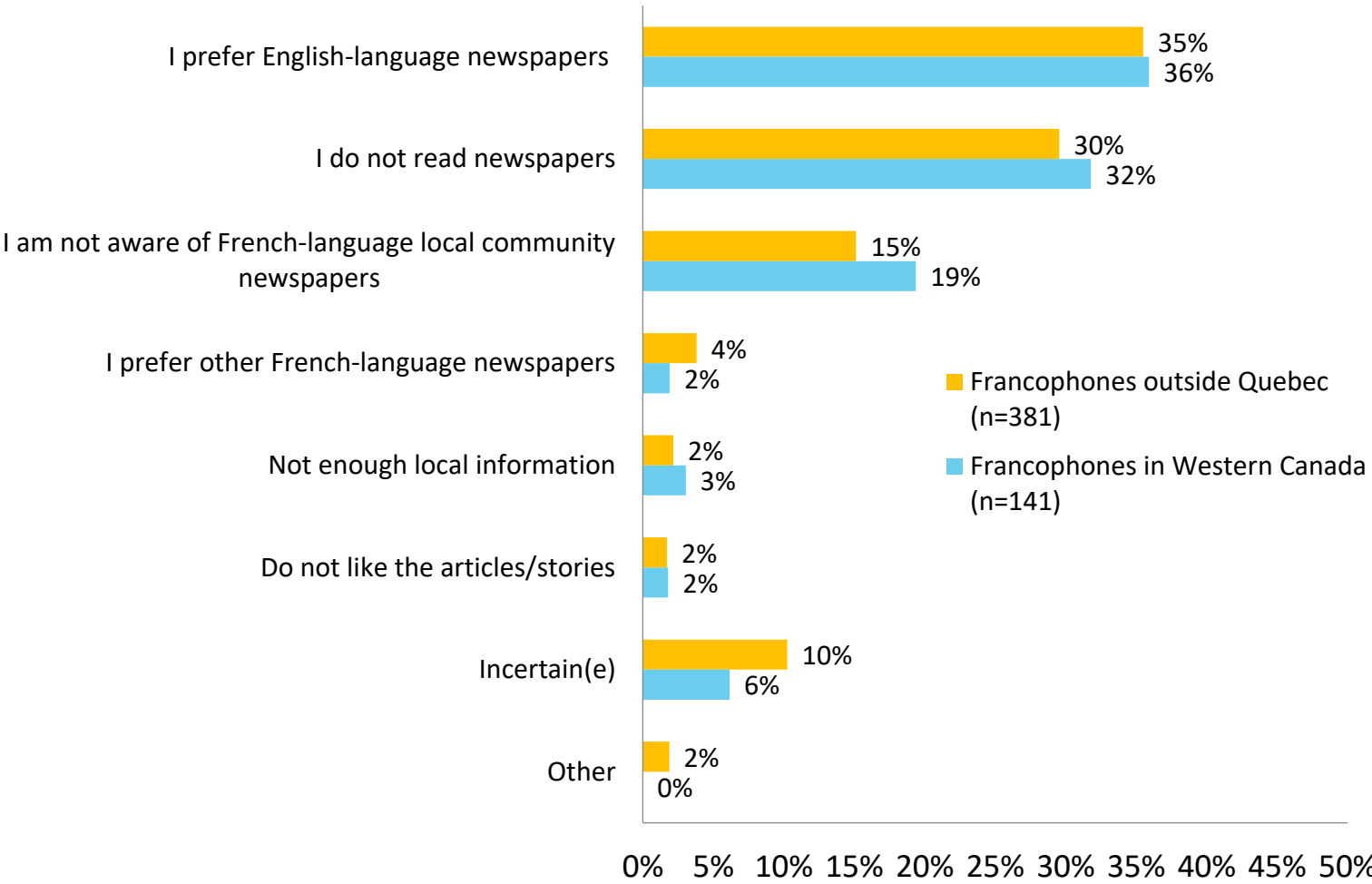
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Francophones in Western Canada who report not reading French-language community newspapers most frequently say it is because they prefer English-language newspapers (36%) or because they do not read newspapers (32%).

Q – [IF DOES NOT READ LOCAL COMMUNITY NEWSPAPER] What is the main reason you do not read French-language local community newspapers? [RANDOMIZE]

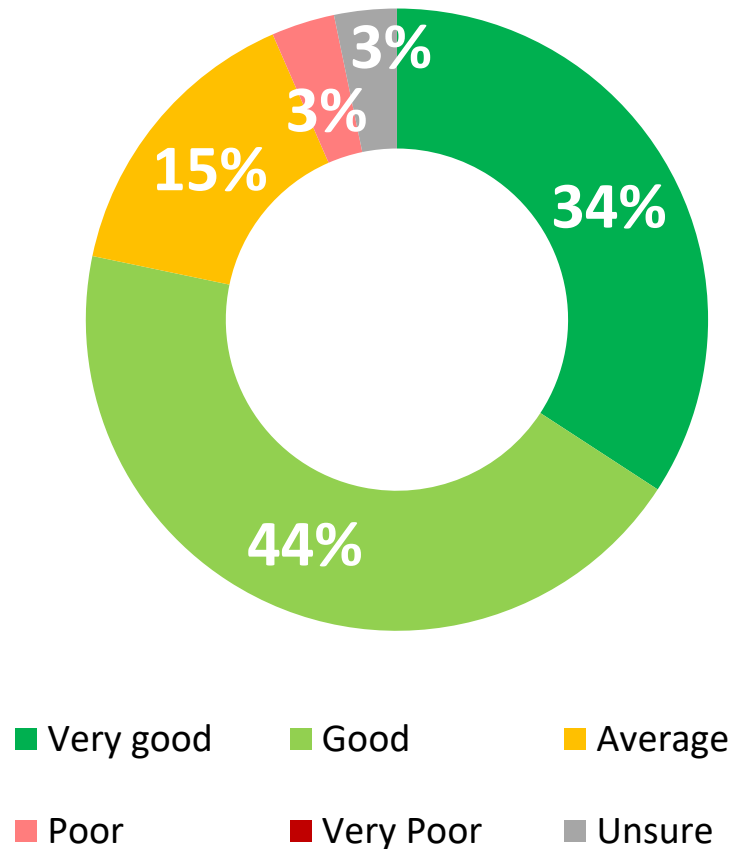
Main reasons for not reading a French-language local community newspaper – FRANCOPHONES IN WESTERN CANADA



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=381 Francophones outside Quebec

Francophones in Western Canada




*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – [IF READS LOCAL COMMUNITY NEWSPAPERS] Do you believe that French-language local community newspapers do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?

Job done by local community newspapers at adapting to the needs and reflect realities of the community – FRANCOPHONES IN WESTERN CANADA

| | | |
|----------------|-------------------------------------|-------------|
| Very good/Good | Francophones outside Quebec (n=275) | West (n=74) |
| | 76.4% | 78.3% |
| Average | Francophones outside Quebec (n=275) | West (n=74) |
| | 19.6% | 15.2% |
| Very poor/Poor | Francophones outside Quebec (n=275) | West (n=74) |
| | 2.2% | 3.3% |

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=275 Francophones outside Quebec who read a French-language local community newspaper.



Perceptions of OLMC media (Francophones outside Quebec)

This section focuses on awareness and views of French-language local community radio stations and newspapers for 666 Francophones outside Quebec, including 351 in Ontario, 218 in Western Canada and 97 in Atlantic Canada.

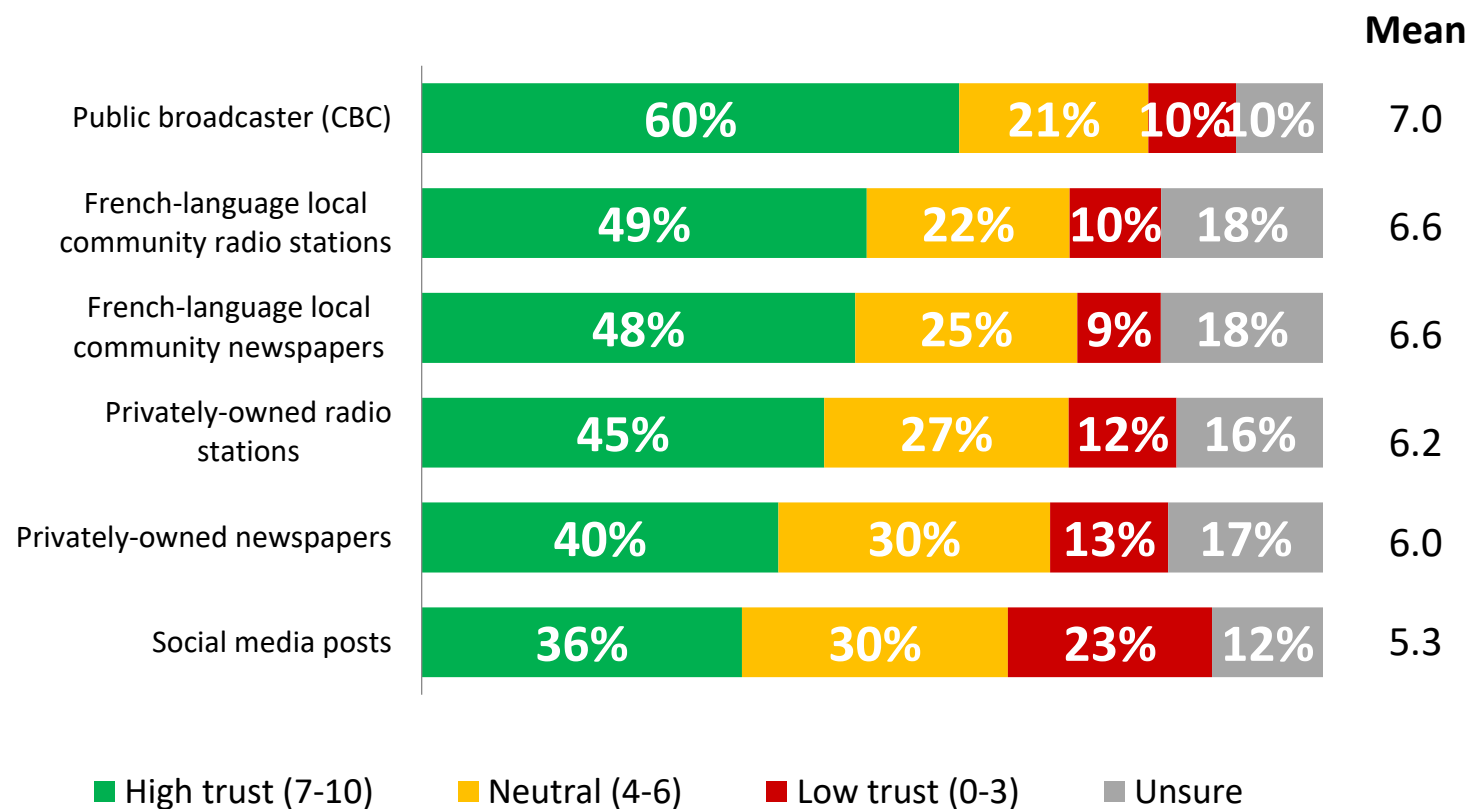
Francophone Canadians outside Quebec trust public broadcasters (60%) most, and social media posts (23%) the least when it comes to information.

They are also much more likely to trust (49% and 47%) than not trust French-language local community media (10% and nine percent).

Francophones in western Canada are less likely to trust local community radio stations and newspapers than those in Atlantic Canada.

Q – On a scale of 0 to 10, where 0 is no trust and 10 is complete trust, please rate how much you trust the information from the following sources: [RANDOMIZE]

Trust in media – FRANCOPHONES OUTSIDE QUEBEC



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside Quebec

Trust in media by demographics – FRANCOPHONES OUTSIDE QUEBEC

Q – On a scale of 0 to 10, where 0 is no trust and 10 is complete trust, please rate how much you trust the information from the following sources: [RANDOMIZE]

| | | Outside Quebec (n=666) | Atlantic (n=97) | Ontario (n=351) | West (n=218) | Men (n=363) | Women (n=303) | 18-34 (n=168) | 35-54 (n=265) | 55 plus (n=233) |
|------|--|------------------------|-----------------|-----------------|--------------|-------------|---------------|---------------|---------------|-----------------|
| MEAN | Public broadcaster (CBC) | 7.0 | 7.2 | 7.1 | 6.2 | 7.0 | 7.0 | 6.9 | 6.7 | 7.3 |
| | French-language local community radio stations | 6.6 | 7.1 | 6.5 | 5.9 | 6.8 | 6.4 | 6.6 | 6.3 | 6.8 |
| | French-language local community newspapers | 6.6 | 7.1 | 6.5 | 5.8 | 6.7 | 6.4 | 6.6 | 6.2 | 6.8 |
| | Privately-owned radio stations | 6.2 | 6.3 | 6.3 | 5.7 | 6.5 | 5.9 | 6.2 | 6.0 | 6.3 |
| | Privately-owned newspapers | 6.0 | 5.9 | 6.1 | 5.6 | 6.3 | 5.6 | 6.1 | 5.8 | 6.0 |
| | Social media posts | 5.3 | 5.6 | 5.2 | 5.0 | 5.5 | 5.1 | 5.9 | 5.7 | 4.5 |

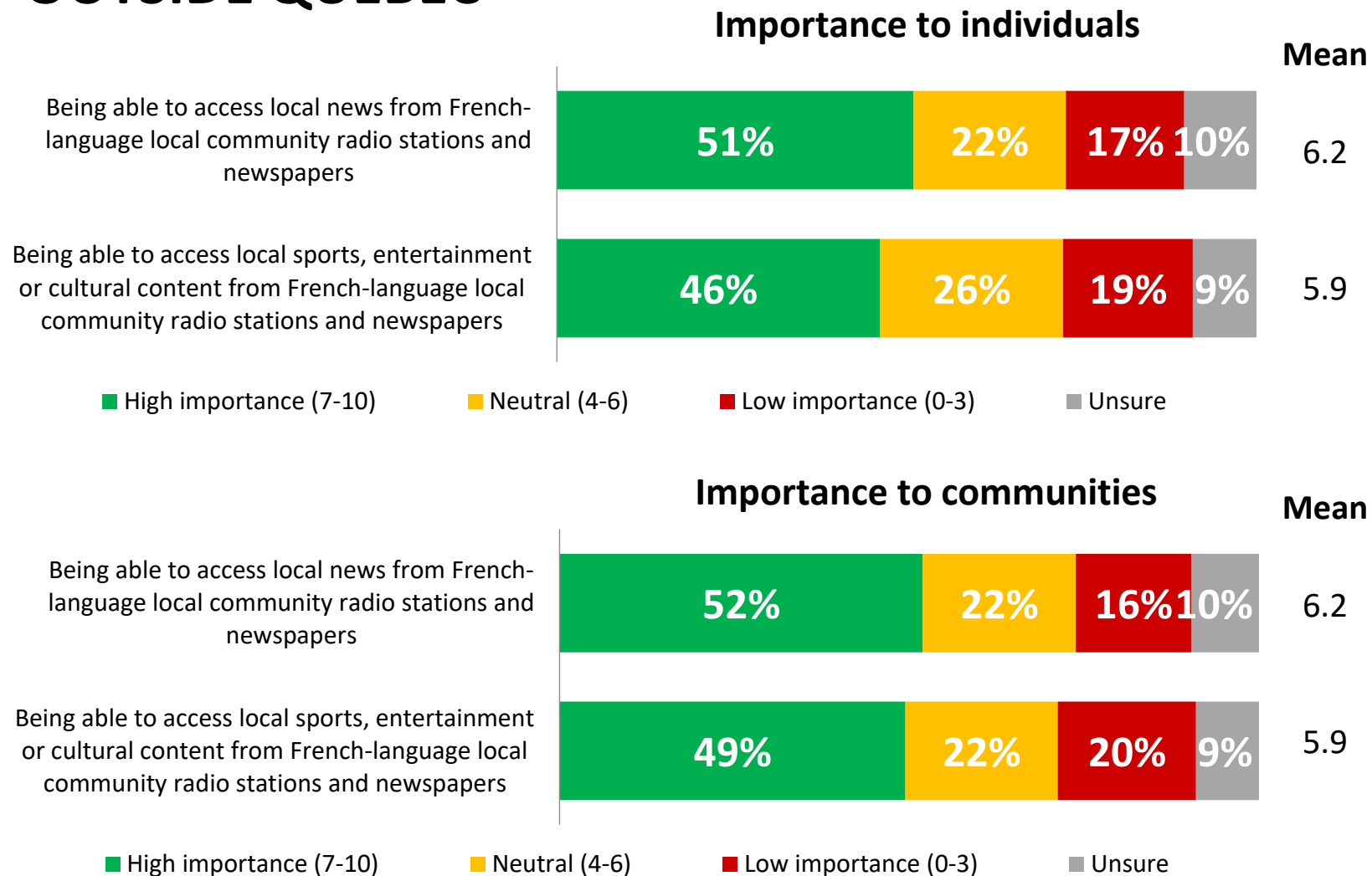
Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside Quebec

Francophone Canadians outside Quebec are more likely to say being able to access local news and local sports, entertainment and cultural content from French-language local community radio stations is important than not important to themselves and to their community.

Q – On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to you: [ROTATE]

Q – On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to your community:

Importance of OLMC media – FRANCOPHONES OUTSIDE QUEBEC



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=665 Francophones outside Quebec.

Importance of OLMC media roles to individuals by demographics – FRANCOPHONES OUTSIDE QUEBEC

Q – On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to you: [ROTATE]

| | | Importance to individuals | | | | | | | | |
|------|--|---------------------------|-----------------|-----------------|--------------|-------------|---------------|---------------|---------------|-----------------|
| | | Outside Quebec (n=665) | Atlantic (n=97) | Ontario (n=350) | West (n=218) | Men (n=363) | Women (n=302) | 18-34 (n=168) | 35-54 (n=265) | 55 plus (n=232) |
| MEAN | Being able to access local news from French-language local community radio stations and newspapers | 6.2 | 7.1 | 5.9 | 5.6 | 6.3 | 6.1 | 6.4 | 6.3 | 5.9 |
| | Being able to access local sports, entertainment or cultural content from French-language local community radio stations and newspapers | 5.9 | 6.9 | 5.7 | 5.3 | 6.1 | 5.7 | 6.3 | 5.9 | 5.7 |
| | | Importance to communities | | | | | | | | |
| | | Outside Quebec (n=665) | Atlantic (n=97) | Ontario (n=350) | West (n=218) | Men (n=363) | Women (n=302) | 18-34 (n=168) | 35-54 (n=264) | 55 plus (n=232) |
| MEAN | Being able to access local news from French-language local community radio stations and newspapers | 6.2 | 7.0 | 6.0 | 5.7 | 6.4 | 6.1 | 6.5 | 6.2 | 6.1 |
| | Being able to access local sports, entertainment or cultural content from French-language local community radio stations and newspapers | 5.9 | 6.5 | 5.7 | 5.4 | 6.0 | 5.8 | 6.2 | 6.0 | 5.5 |

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=665 Francophones outside Quebec

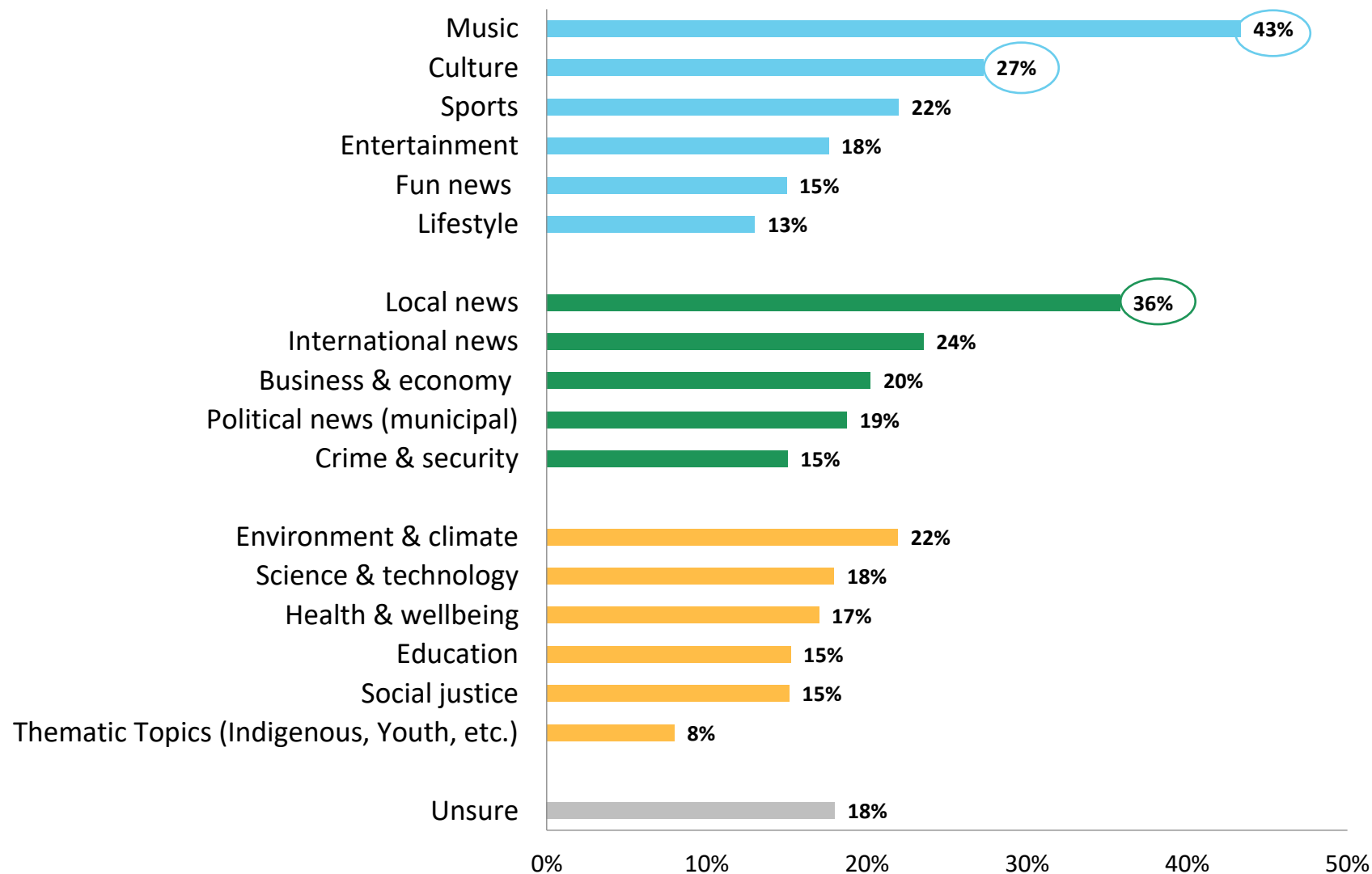
A man with a beard and short hair is shown in profile, facing right. He is wearing large black headphones and is positioned in front of a professional microphone with a pop filter. The microphone is mounted on a boom arm. In the background, a laptop is visible on a desk. The overall lighting is dim, with a warm, slightly orange tint. The text "Desired content on OLMC media (Francophones outside Quebec)" is overlaid on the left side of the image. The words "Desired content" are in orange, and the rest of the text is in white. There are blue geometric shapes in the top right and bottom right corners of the image.

Desired content on OLMC media (Francophones
outside Quebec)

Asked to select what programming is most likely to entice them to listen, Francophones outside Quebec most frequently say music (43%) is the most likely to entice them to listen to French-language local community radio stations, followed by local news (36%) and culture (27%).

Q – Please select the following types of French-language local community radio station programming that are the most likely to entice you to listen. [SELECT ALL THAT APPLY] [RANDOMIZE]

Preferred programming for OLMC radio stations – FRANCOPHONES OUTSIDE QUEBEC



*Based on multiple response options

*Weighted to the true population proportion.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=663 Francophones outside Quebec

Preferred programming for OLMC radio stations – FRANCOPHONES OUTSIDE QUEBEC

Q – Please select the following types of French-language local community radio station programming that are the most likely to entice you to listen. [SELECT ALL THAT APPLY]
[RANDOMIZE]

| | Outside Quebec (n=663) | Atlantic (n=97) | Ontario (n=349) | West (n=217) | Men (n=361) | Women (n=302) | 18-34 (n=168) | 35-54 (n=263) | 55 plus (n=232) |
|---|---------------------------|--------------------|--------------------|-----------------|----------------|------------------|------------------|------------------|--------------------|
| Music | 43.3% | 53.0% | 37.0% | 47.5% | 43.8% | 42.9% | 51.0% | 41.1% | 40.0% |
| Local news | 35.8% | 47.3% | 32.0% | 30.5% | 36.2% | 35.4% | 22.7% | 34.9% | 45.2% |
| Culture | 27.3% | 22.9% | 28.8% | 29.3% | 22.9% | 31.4% | 31.8% | 26.7% | 24.7% |
| International news | 23.5% | 20.4% | 24.8% | 24.2% | 24.6% | 22.5% | 21.3% | 23.2% | 25.2% |
| Sports | 22.0% | 19.1% | 22.4% | 24.8% | 29.7% | 14.6% | 26.1% | 24.0% | 17.7% |
| Environment & climate | 21.9% | 31.9% | 17.9% | 19.2% | 19.7% | 24.0% | 29.6% | 17.6% | 20.3% |
| Business & economy | 20.2% | 19.2% | 20.1% | 21.8% | 23.7% | 16.9% | 18.4% | 16.4% | 24.4% |
| Political news (municipal) | 18.7% | 20.2% | 18.7% | 16.8% | 21.4% | 16.2% | 17.0% | 14.8% | 23.0% |
| Science & technology | 18.0% | 16.8% | 18.1% | 19.2% | 22.6% | 13.5% | 22.4% | 18.9% | 14.3% |
| Entertainment | 17.6% | 18.1% | 15.5% | 22.9% | 15.4% | 19.7% | 18.9% | 19.9% | 14.9% |
| Health & wellbeing | 17.0% | 20.5% | 15.5% | 16.2% | 12.1% | 21.7% | 9.8% | 19.6% | 19.6% |
| Education | 15.2% | 13.7% | 16.5% | 14.0% | 12.2% | 18.1% | 23.0% | 14.7% | 10.5% |
| Social justice | 15.1% | 11.7% | 16.2% | 16.8% | 12.3% | 17.8% | 22.2% | 13.9% | 11.5% |
| Fun news | 15.0% | 20.1% | 12.4% | 15.2% | 12.8% | 17.1% | 14.9% | 16.6% | 13.7% |
| Crime & security | 15.0% | 14.4% | 15.7% | 14.0% | 12.7% | 17.2% | 16.8% | 14.9% | 14.0% |
| Lifestyle | 13.0% | 13.2% | 12.3% | 14.6% | 10.6% | 15.3% | 17.2% | 14.6% | 9.0% |
| Thematic Topics (Indigenous, Youth, etc.) | 8.0% | 7.0% | 6.6% | 13.0% | 6.3% | 9.6% | 11.2% | 7.6% | 6.1% |
| Unsure | 18.0% | 10.3% | 21.9% | 17.8% | 15.0% | 20.8% | 5.9% | 18.0% | 25.9% |

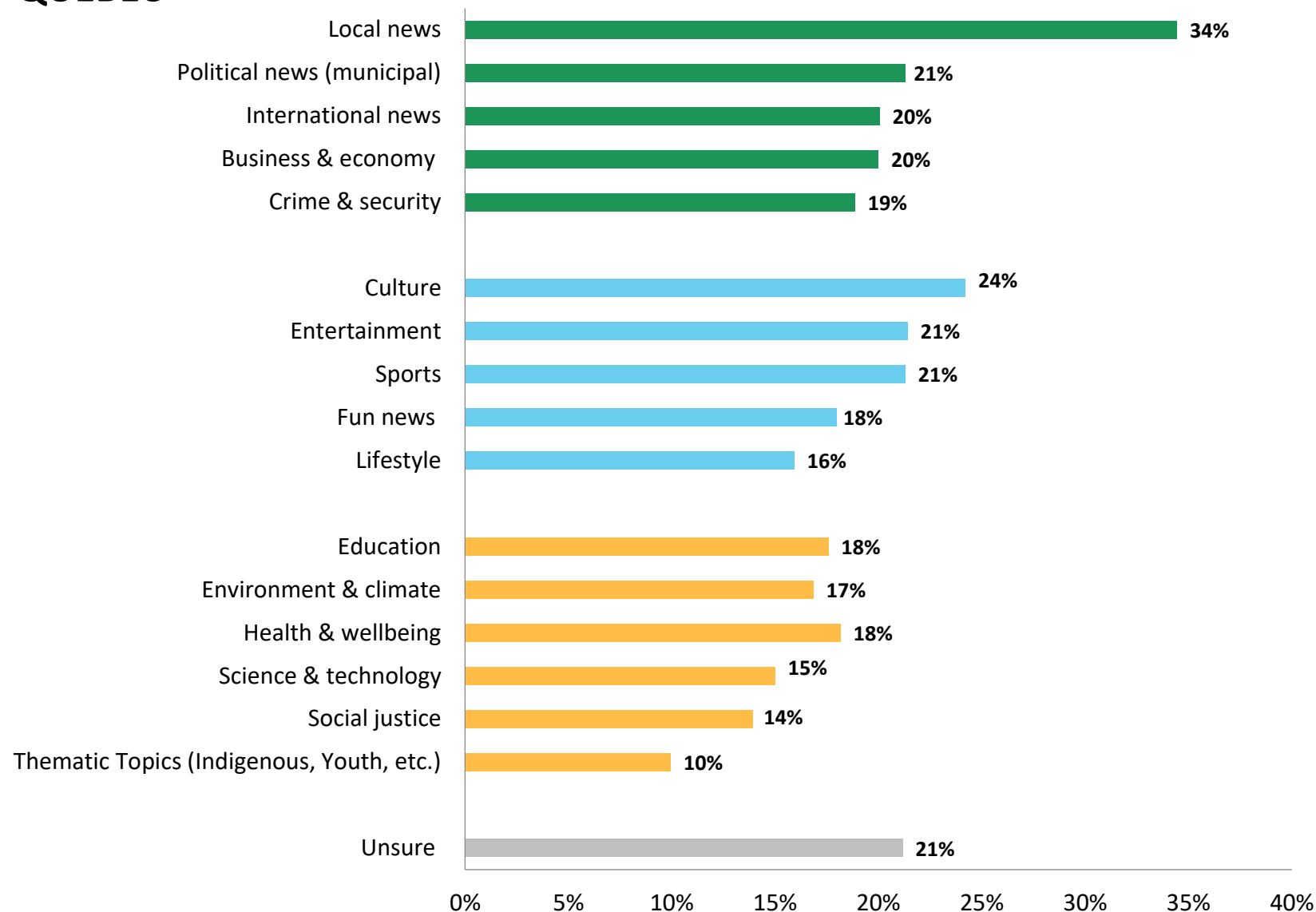
*Based on multiple response options

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=663 Francophones outside Quebec

Francophones outside Quebec most frequently say local news (34%) is the most likely to entice them to read local community newspapers, followed by culture (24%).

Q – Please select the following types of French-language local community newspaper content that are the most likely to entice you to read.
[RANDOMIZE] [SELECT ALL THAT APPLY]

Preferred content for OLMC newspapers – FRANCOPHONES OUTSIDE QUEBEC



*Based on multiple response options

*Weighted to the true population proportion.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=664 Francophones outside Quebec

Preferred programming for OLMC newspapers – FRANCOPHONES OUTSIDE QUEBEC

Q – Please select the following types of French-language local community newspaper content that are the most likely to entice you to read. [RANDOMIZE] [SELECT ALL THAT APPLY]

| | Outside Quebec (n=664) | Atlantic (n=97) | Ontario (n=350) | West (n=217) | Men (n=361) | Women (n=303) | 18-34 (n=168) | 35-54 (n=263) | 55 plus (n=233) |
|---|------------------------------|--------------------|--------------------|-----------------|----------------|------------------|------------------|------------------|--------------------|
| Local news | 34.5% | 46.4% | 31.3% | 26.6% | 36.5% | 32.5% | 28.5% | 34.1% | 38.6% |
| Culture | 24.2% | 23.7% | 24.5% | 24.1% | 21.0% | 27.3% | 32.4% | 23.2% | 19.7% |
| Entertainment | 21.4% | 28.8% | 18.6% | 19.1% | 24.5% | 18.5% | 22.6% | 23.7% | 18.8% |
| Political news (municipal) | 21.3% | 27.5% | 19.3% | 18.4% | 23.4% | 19.3% | 21.3% | 16.2% | 25.4% |
| Sports | 21.3% | 21.1% | 19.3% | 27.1% | 28.5% | 14.5% | 25.6% | 26.2% | 14.6% |
| International news | 20.1% | 16.8% | 22.8% | 17.1% | 21.6% | 18.7% | 14.8% | 24.4% | 20.1% |
| Business & economy | 20.0% | 19.6% | 21.4% | 16.7% | 23.0% | 17.2% | 21.4% | 18.4% | 20.3% |
| Crime & security | 18.9% | 26.5% | 16.7% | 14.2% | 18.4% | 19.3% | 18.8% | 17.9% | 19.7% |
| Health & wellbeing | 18.2% | 19.2% | 18.7% | 15.2% | 13.7% | 22.5% | 10.8% | 19.3% | 22.1% |
| Fun news | 18.0% | 18.0% | 18.2% | 17.5% | 17.9% | 18.1% | 18.9% | 22.5% | 13.9% |
| Education | 17.6% | 17.4% | 19.7% | 12.0% | 14.8% | 20.2% | 27.5% | 17.5% | 11.2% |
| Environment & climate | 16.9% | 18.2% | 16.6% | 15.7% | 15.7% | 18.0% | 20.7% | 15.3% | 15.6% |
| Lifestyle | 15.9% | 16.1% | 16.9% | 12.9% | 12.9% | 18.8% | 17.3% | 17.8% | 13.6% |
| Science & technology | 15.0% | 9.6% | 17.4% | 16.0% | 17.0% | 13.1% | 14.7% | 17.2% | 13.5% |
| Social justice | 13.9% | 15.5% | 12.2% | 16.6% | 11.6% | 16.2% | 17.7% | 14.0% | 11.4% |
| Thematic Topics (Indigenous, Youth, etc.) | 10.0% | 8.2% | 10.1% | 12.2% | 8.8% | 11.1% | 12.8% | 9.1% | 8.8% |
| Unsure | 21.2% | 16.9% | 22.9% | 22.3% | 17.7% | 24.5% | 10.9% | 19.3% | 29.4% |

*Based on multiple response options

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=664 Francophones outside Quebec



Sources of local content (news) related to
communities (Francophones outside Quebec)

Source of news related to communities – FRANCOPHONES OUTSIDE QUEBEC

Q – Please select your top three main sources of local news in your community. [SELECT UP TO 3] [RANDOMIZE]

| | Outside Quebec (n=666) | Atlantic (n=97) | Ontario (n=351) | West (n=218) | Men (n=363) | Women (n=303) | 18-34 (n=168) | 35-54 (n=265) | 55 plus (n=233) |
|--|---------------------------|--------------------|--------------------|-----------------|----------------|------------------|------------------|------------------|--------------------|
| National television (such as CTV News, BNN) | 37.0% | 35.7% | 37.1% | 38.2% | 40.9% | 33.2% | 41.2% | 32.9% | 37.4% |
| Public broadcasters (such as CBC, Radio-Canada, Télé-Québec) | 32.7% | 34.6% | 34.8% | 24.3% | 35.3% | 30.3% | 28.4% | 25.5% | 41.3% |
| English-language radio stations | 25.2% | 20.4% | 25.0% | 32.4% | 26.3% | 24.1% | 22.1% | 26.3% | 26.3% |
| National news websites/apps | 20.8% | 19.6% | 20.2% | 24.5% | 22.5% | 19.2% | 24.9% | 21.7% | 17.4% |
| English-language newspapers | 20.3% | 14.8% | 21.5% | 24.7% | 21.0% | 19.8% | 13.8% | 19.7% | 25.1% |
| French-language local community radio stations | 16.2% | 28.6% | 11.4% | 12.4% | 15.7% | 16.7% | 19.0% | 12.2% | 17.6% |
| English-language social media posts | 16.2% | 13.6% | 16.0% | 20.5% | 13.4% | 18.9% | 21.0% | 22.4% | 8.2% |
| National newspapers (such as Globe and Mail, National Post) | 14.6% | 6.9% | 18.9% | 13.6% | 15.5% | 13.8% | 21.2% | 15.6% | 9.5% |
| French-language local television | 12.9% | 12.9% | 14.5% | 8.3% | 14.0% | 11.8% | 14.0% | 13.8% | 11.4% |
| French-language local community newspapers | 10.8% | 19.5% | 8.1% | 6.2% | 13.2% | 8.4% | 6.5% | 6.7% | 16.8% |
| French-language social media posts | 10.4% | 16.7% | 8.2% | 7.5% | 8.7% | 12.0% | 7.0% | 14.8% | 9.0% |
| French-language local news websites/apps | 8.6% | 11.7% | 7.6% | 7.2% | 8.8% | 8.5% | 12.5% | 6.2% | 8.0% |
| Unsure | 11.7% | 9.4% | 12.2% | 13.5% | 7.8% | 15.4% | 9.0% | 12.2% | 13.1% |

*Based on multiple response options

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=666 Francophones outside Quebec

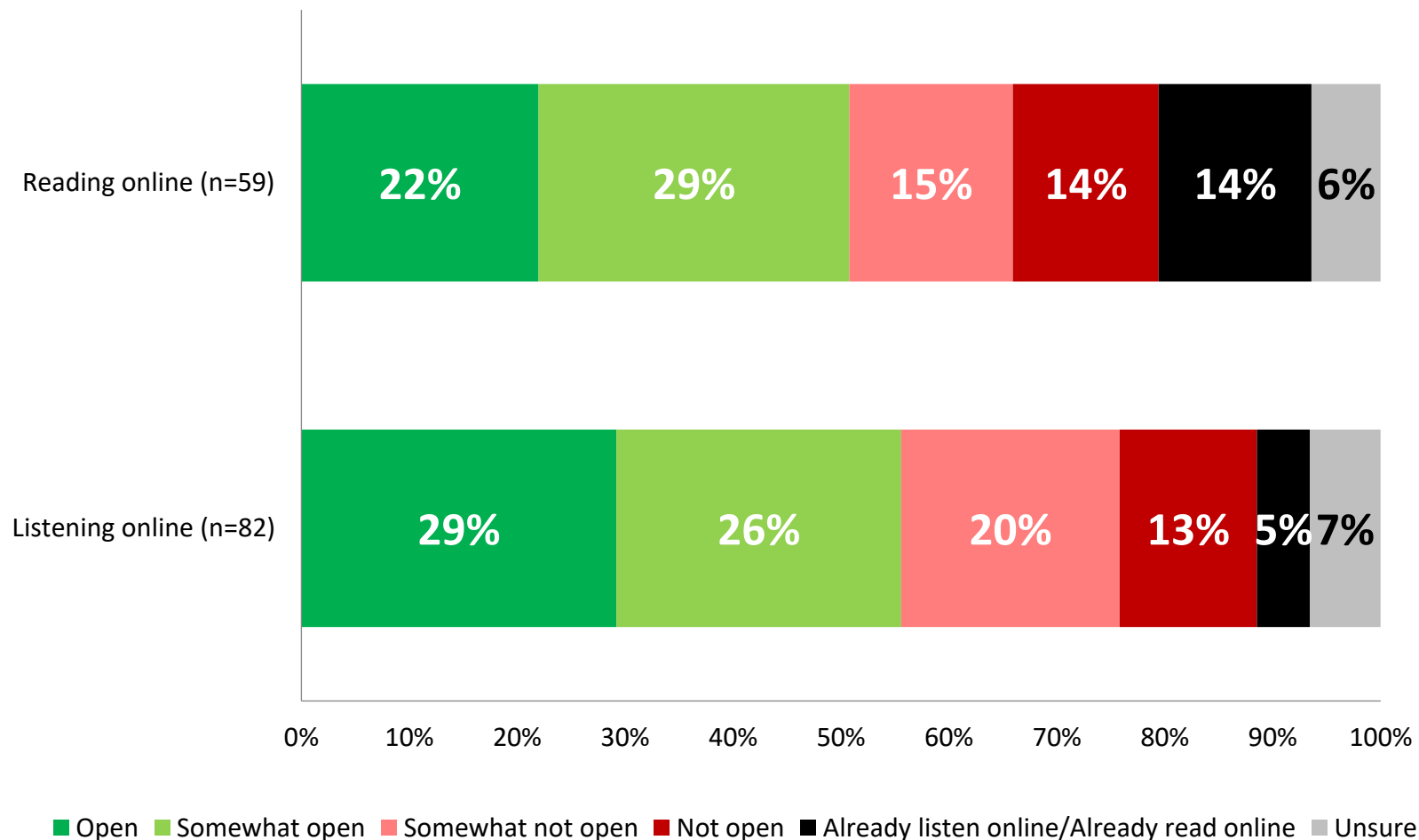
Francophones outside Quebec who select French-language local community radio stations are more likely to be open or somewhat open to listening online than not open.

Those that select newspapers in their top three sources of local news are also more likely to be open to read online than not open.

Q – [IF SELECTS LOCAL COMMUNITY RADIO STATIONS IN Q21] If your French-language local community radio stations were no longer available on traditional radio frequencies, would you be open, somewhat open, somewhat not open or not open to listening online?

Q – [IF SELECTS LOCAL COMMUNITY NEWSPAPERS IN Q21] If your French-language local community newspapers were no longer available in traditional print, would you be open, somewhat open, somewhat not open or not open to reading online?

Level of openness to listening to radio online and reading newspapers online – FRANCOPHONES OUTSIDE QUEBEC



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=82 Francophones outside Quebec who say French-language local community radio stations or newspapers are a top three source of local news for them.

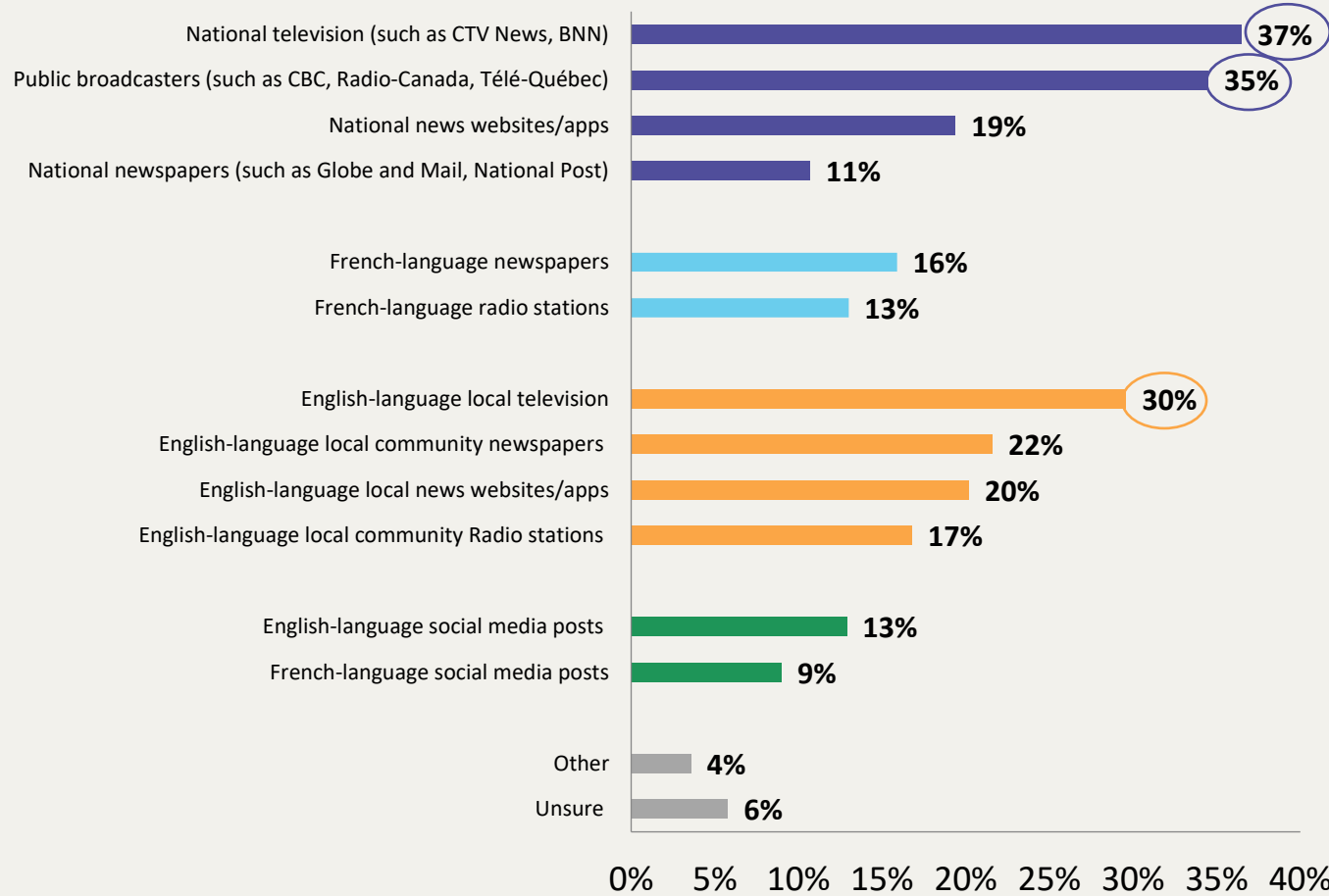
PART II - Anglophones in Quebec

This section focuses on awareness and views of English-language local community radio stations and newspapers for 453 Anglophones in Quebec.

Top sources of local news - ANGLOPHONES

Main sources of local news

Q –Please select your top three main sources of local news in your community. [SELECT UP TO 3] [RANDOMIZE]



Trust in official language local community media

Q – On a scale of 0 to 10, where 0 is no trust and 10 is complete trust, please rate how much you trust the information from the following sources: [RANDOMIZE]

Top three main
sources of local
news

High trust
(scores of 7-10)

English-
language local
community
newspaper

22%

61%

English-
language local
community
radio stations

17%

55%

*Note: Circles represent the top three local community radio content for Anglophone respondents. Responses are based on multiple response options.

*Weighted to the true population proportion.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=452 Anglophones in Quebec.



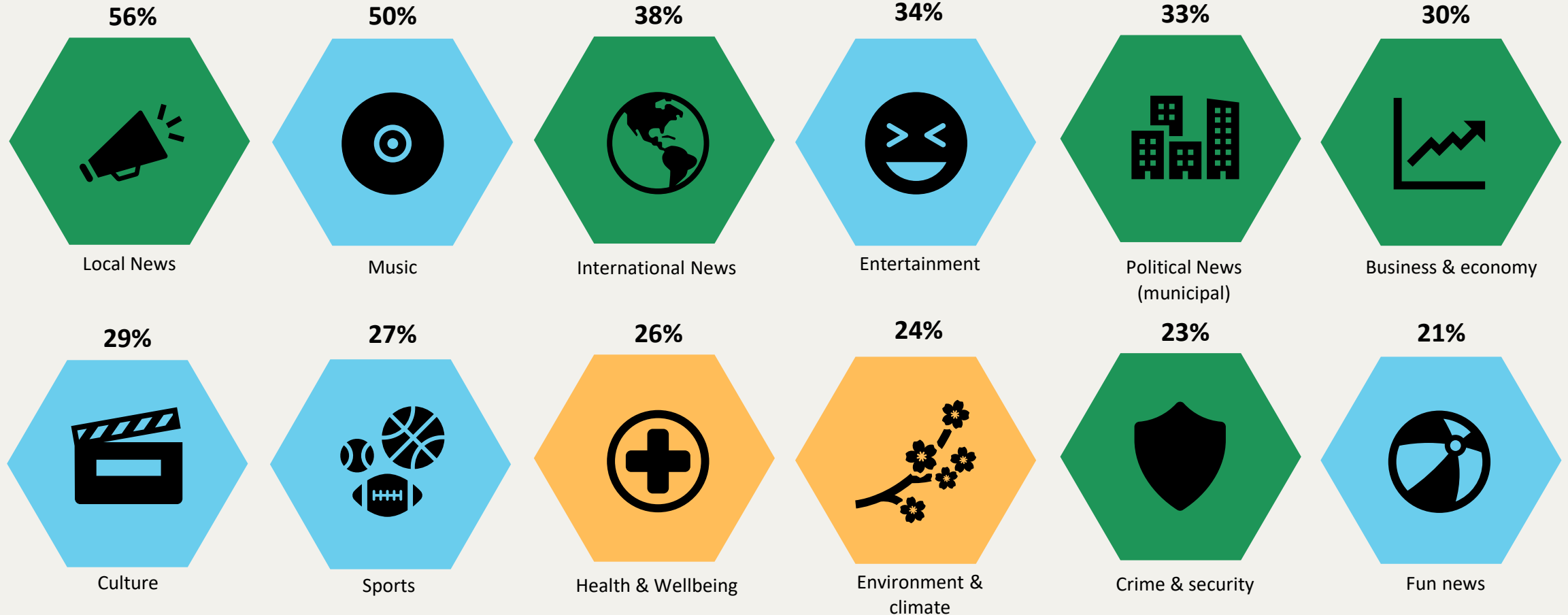
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Preferred programming for OLMC radio stations - ANGLOPHONES

Q – Please select the following types of English-language local community radio station programming that are the most likely to entice you to listen. [SELECT ALL THAT APPLY] [RANDOMIZE]

TOP SELECTIONS



*Based on multiple response options

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=448 Anglophones in Quebec.



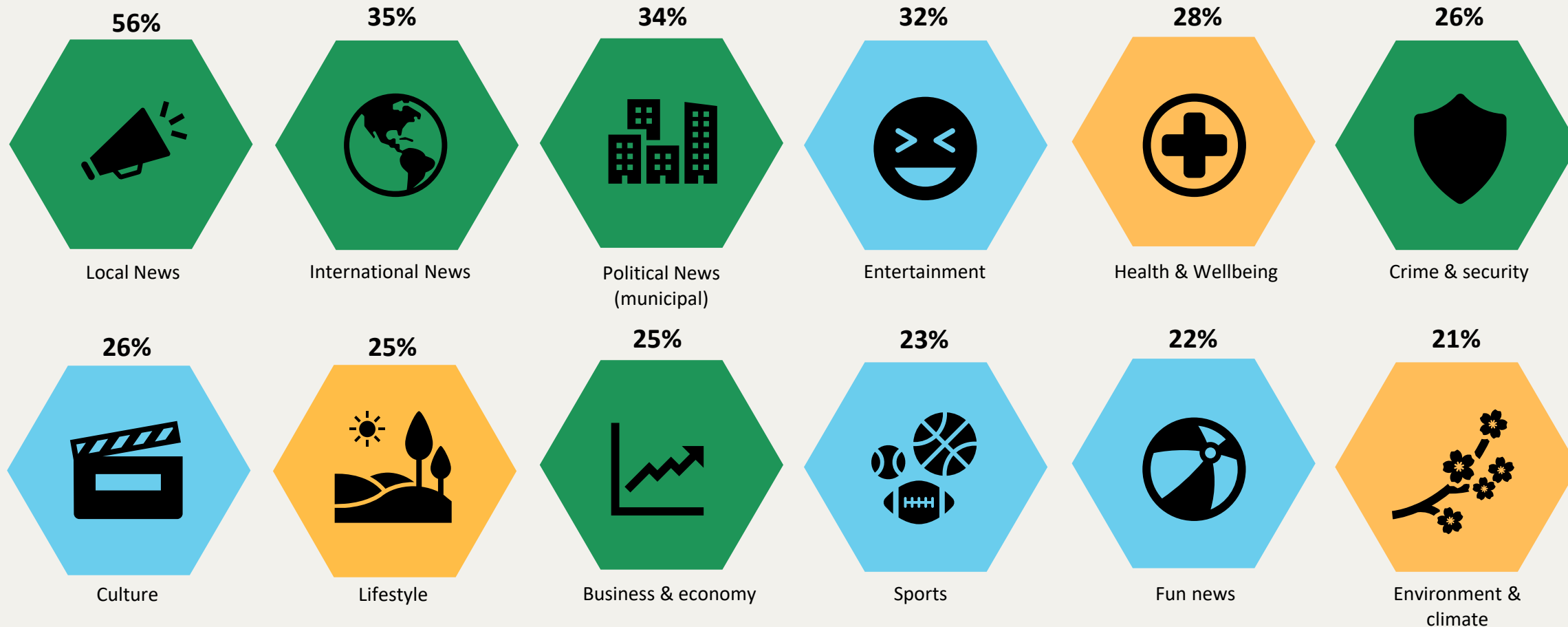
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Preferred content for OLMC newspapers - ANGLOPHONES

Q – Please select the following types of French-language local community newspaper content that are the most likely to entice you to read.
[RANDOMIZE] [SELECT ALL THAT APPLY]

TOP 12 SELECTIONS



*Based on multiple response options

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=447 Anglophones in Quebec.



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KEY MARKET PROFILES - ANGLOPHONES

Profile 1 – Casually Engaged - 34% of Anglophones in Quebec

Anglophones in Quebec who have focused interests in OLMC radio stations and newspapers. Their desired content for this is limited to fewer than six types of programming/content out of a choice of 34 different types such as news, culture, and sports and entertainment. Their connection to English-language local media is less intense and more casual.

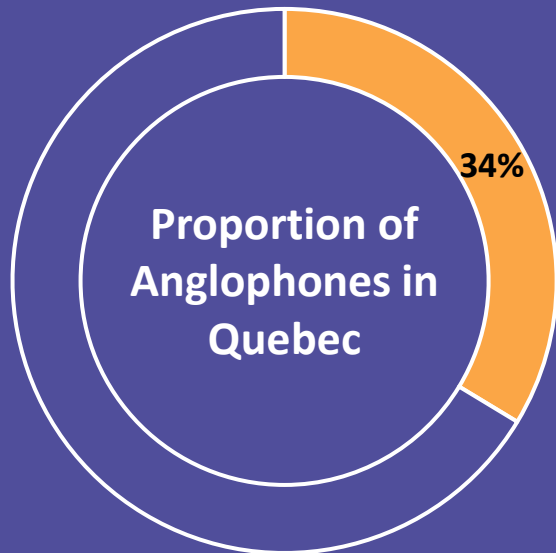
Profile 2 – Actively Involved - 33% of Anglophones in Quebec

Anglophones in Quebec who have an active interest in OLMC radio stations and newspapers. They are interested in different types of content (6- 10 types of programming out of a choice of 34 different types such as news, culture, and sports and entertainment). Their connection to English-language local media is stronger but still has room to grow.

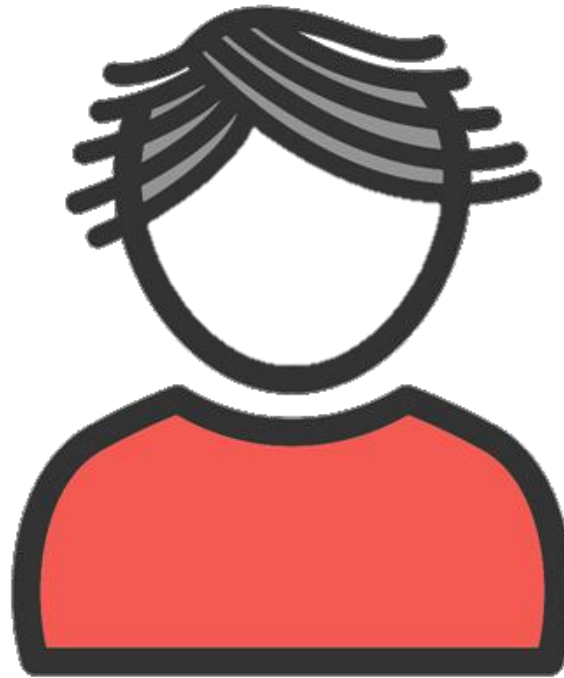
Profile 3 – Immersed Enthusiasts - 33% of Anglophones in Quebec

Anglophones in Quebec who are strongly engaged with OLMC radio stations and newspapers. They are interested in a wide variety of types of content (11+ types of programming out of a choice of 34 different types such as news, culture, and sports and entertainment). Their connection to English-language local community media is deep and varied.

Casually Engaged



Key Market Profiles – Anglophone OLMCs in Quebec – AT A GLANCE

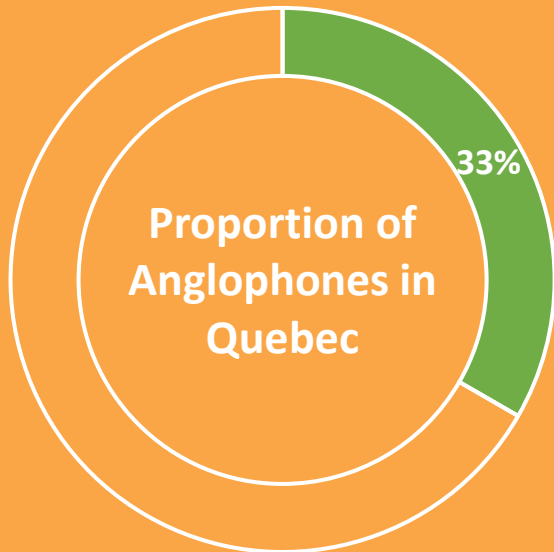


Focused and more casual interest in local community English-language radio stations and newspapers, with limited desired content and programming from this local media.

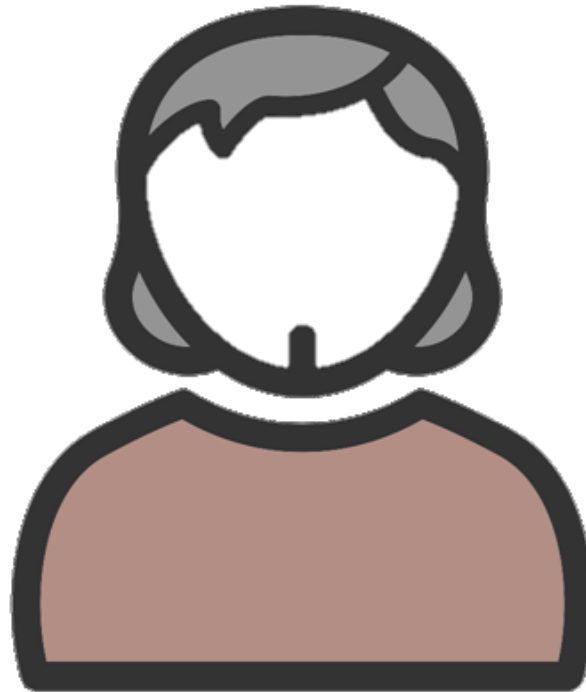
- Less likely to be educated at a college or university level
- More likely to be a third generation or more Canadian citizen, male, under 55 years of age and residing outside of Montreal
- More likely than other profiles to name French-language radio as a top source for local news in their community
- Less likely to trust different sources of media, including OLMC media
- Less likely to rate being able to access local news from OLMC radio or newspapers as important to them or their community

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.

Actively Involved



Key Market Profiles – Anglophone OLMCs in Quebec – AT A GLANCE



Active interest in local community English-language radio stations and newspapers, and stronger connection to this local media than the casually engaged, but room to grow with an interest in varied content and programming.

- More likely to be male, residing in Montreal and a third generation or more Canadian citizen.
- More likely to trust local community English-language radio stations or newspapers
- More likely to think it is important for themselves and their community to be able to access local news from English-language community radio or newspapers

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.

Key Market Profiles – Anglophone OLMCs in Quebec – AT A GLANCE

Immersed Enthusiasts



Strongly engaged with a deep connection to local community English-language radio stations and newspapers. Interested in extensive English-language content and programming.

- More likely to be female, over 55 years of age living in Montreal and have a university level of education
- More likely to be an immigrant than other profiles
- Higher level of trust in various media sources, including public broadcasters English-language local community radio stations and community newspapers
- More likely to place importance to being able to access local news from English-language community radio or newspapers to themselves or their community

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.



Casually Engaged

Focused and more casual interest in local community English-language radio stations and newspapers, with limited desired content and programming from this local media.

The Casually Engaged are less likely to be educated at a college or university level and more likely to be a third generation or more Canadian citizen.

They are more likely to be male, under 55 years of age and residing outside of Montreal.

Key Market Profiles – Anglophone OLMCs in Quebec – Casually Engaged

- Compared to Immersed Enthusiasts, these individuals are **less likely to reside in Montreal** (39%) and are **more likely to be male** (52%) and **under the age of 55** (64%). They are also more likely to report they are **third or more generation Canadians** (58%) than the other profiles, as well as **less likely to have a higher level of education** (33% have high school level of education).
- Casually Engaged respondents are more likely to report they **have not listened to or read** any of the local official language minority radio stations (82%) or newspapers (68%).
- They are more likely to say they do not listen to local English-language radio stations because they **prefer French radio stations** (22%) and are more likely to say the main reason they read local English-language newspapers is **to get local information** (60%) and the main reason they do not read them is that **they don't read newspapers at all** (46%).
- Additionally, Casually Engaged individuals are **more likely** than other profiles to name **French-language radio as a top source** for local news in their community (19%).
- Overall, this group is **less likely to trust different sources of media** across the board, including English-language local community radio stations (6.2 out of 10) and community newspapers (6.2 out of 10).
- They are also **less likely** to rate being able to **access local news from English-language community radio or newspapers as important** to them (mean of 5.6) or their community (5.7), as well as being able to access local sports, entertainment or cultural content (themselves: mean of 5.4; their community: mean of 5.0).

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.



Actively Involved

Active interest in local community English-language radio stations and newspapers, and stronger connection to this local media than the casually engaged, but room to grow with an interest in varied content and programming.

They are more likely to be male, residing in Montreal and a third generation or more Canadian citizen.

Key Market Profiles – Anglophone OLMCs in Quebec – Actively Involved

- Demographically, this group is similar to Immersed Enthusiasts but are **comparatively less likely to be immigrants** (17%), more likely to be **third generation or more citizens** (49%) and more likely to be **male** (54%).
- **One in three** of those Actively Involved report having **listened to any** of the local official language minority radio stations (31%), while more than three in five report **reading at least one** of the local English-language newspapers (61%).
- Actively Involved individuals often say they do not listen to local English-language radio stations because they **prefer other English-language radio stations** (44%) and most often say the main reason they read local English-language newspapers is **to get local information** (48%).
- Their **top reported sources of local news** in their community are **national television** (37%) and **public broadcasters** (36%), followed by local English-language news sources such local television (31%) and local newspapers (27%).
- Similarly to Immersed Enthusiasts, this group is **more likely to trust local community English-language** radio stations (mean 7.0 out of 10) or newspapers (7.1) than privately owned ones (radio: 6.4; newspapers: 6.4).
- They are also **more likely to think it is important** for themselves (mean of 7.2) and their community (7.4) to be able to **access local news** from English-language community radio or newspapers, compared to being able to **access local sports, entertainment or cultural content** (themselves: mean of 6.7; their community: 6.9).

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.



Immersed Enthusiasts

Strongly engaged with a deep connection to local community English-language radio stations and newspapers. Interested in extensive English-language content and programming.

They are more likely to be female, over 55 years of age living in Montreal. They are also more likely to be an immigrant than other profiles and have a university level of education.

Key Market Profiles – Anglophone OLMCs in Quebec – Immersed Enthusiasts

- Immersed Enthusiasts are **more likely to be living in Montreal** (52%) than Casually Engaged individuals and are more likely to be **female** (59%; male: 41%) and **to be 55 years of age and older** (49%). They are also more likely to be **immigrants** (29%) or **first/second generation Canadians** (39%), as well as **more likely to have a higher level of education** (49% have completed university/grad studies).
- They are **more likely to report they have listened to or read at least one** of the local official language minority radio stations (24%) or newspapers (59%) and are **more likely to select English-language community radio** (24%), **newspapers** (27%) or television (35%) as one of their top three main sources of local news in their community.
- In terms of why they do not listen to local English-language radio stations, Immersed Enthusiasts more often say it is because they **prefer other English-language radio stations** (45%) compared to the Casually Engaged. They are more likely to say the main reason they read local English-language newspapers is that **it is in their preferred language** (35%), and more often say they do not read local English-language newspapers because **they are not aware of any** (34%).
- Immersed Enthusiasts have a **higher level of trust in various media sources**, including public broadcasters (mean of 8.0), English-language local community radio stations (7.6 out of 10) and community newspapers (7.9 out of 10).
- These individuals give a **higher importance rating to being able to access** local news from **English-language community radio or newspapers** as important to them (mean of 8.4) or their community (8.6), as well as being able to access local sports, entertainment or cultural content from those same sources (themselves: mean of 8.1; their community: 8.0).

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.

ANGLOPHONE PROFILES – Intensity Scores

| Demographic* | | Profile 1 – Casually Engaged (n=156) | Profile 2 – Actively Involved (n=149) | Profile 3 – Immersed Enthusiasts (n=148) |
|--------------------|--|---|--|--|
| Region | Montreal | 38.6% | 52.1% | 51.6% |
| | Rest of Quebec | 40.7% | 30.2% | 28.2% |
| Gender | Men | 52.2% | 53.8% | 40.8% |
| | Women | 47.8% | 46.2% | 59.2% |
| Age | 18-34 | 27.2% | 27.0% | 19.8% |
| | 35-54 | 37.1% | 26.2% | 31.4% |
| | 55 plus | 35.7% | 46.9% | 48.8% |
| Immigration Status | Third or more generation Canadian citizen | 57.7% | 49.1% | 32.2% |
| | First- or second-generation Canadian citizen | 25.1% | 34.4% | 39.0% |
| | Immigrant (not born in Canada) | 12.3% | 16.5% | 28.9% |

*Excludes “Prefer not to say”, totals may not add up to 100.

*Circles indicate a notable difference between profiles

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.

ANGLOPHONE PROFILES – Intensity Scores

| Demographic* | | Profile 1 – Casually Engaged (n=156) | Profile 2 – Actively Involved (n=149) | Profile 3 – Immersed Enthusiasts (n=148) |
|--------------|---|---|--|--|
| Income | Less than \$40,000 | 23.5% | 16.8% | 19.1% |
| | \$40,000 to \$80,000 | 22.7% | 32.2% | 29.0% |
| | \$80,000 to \$120,000 | 22.5% | 24.3% | 23.5% |
| | Over \$120,000 | 21.2% | 15.4% | 16.9% |
| Education | Graduated high school or some high school | 33.1% | 14.2% | 13.5% |
| | Some college or university | 15.4% | 8.4% | 7.8% |
| | Completed college | 14.2% | 25.4% | 29.4% |
| | Completed university or grad studies | 36.4% | 52.0% | 49.3% |

*Excludes Prefer not to say, totals may not add up to 100.

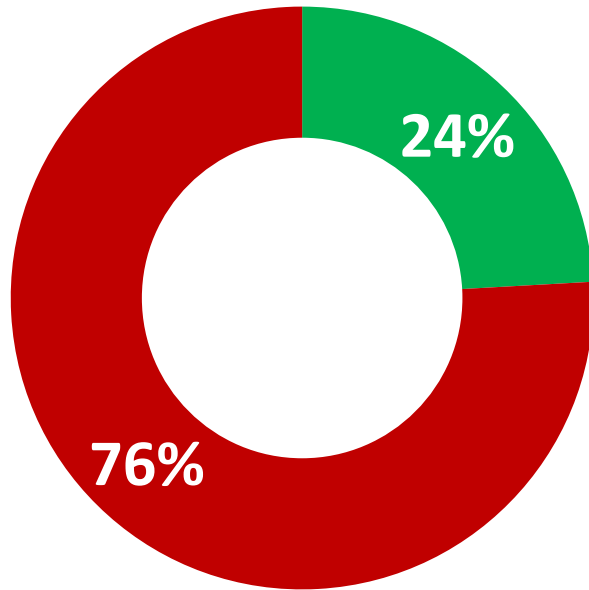
*Circles indicate a notable difference between profiles

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.

A professional broadcast microphone, likely a Neumann U87, is the central focus of the image. It is a large, silver, cylindrical condenser microphone with a fine mesh grille. The microphone is mounted on a black boom arm, which is suspended by a shock mount. The background is a blurred radio studio, showing various pieces of equipment, including a control panel with buttons and lights, and a desk with papers. The overall lighting is dim, creating a professional and focused atmosphere. The text "Awareness – Radio stations (Quebec)" is overlaid on the image in a bold, sans-serif font. The word "Awareness" is in orange, and the rest of the text is in white. The text is positioned in the upper left quadrant of the image.

Awareness – Radio stations (Quebec)

Anglophones outside Quebec



- Listened to at least one English-language local community radio station
- Has not listened to any English-language local community radio station

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Listening to local community radio stations - ANGLOPHONES

Francophones outside Quebec

| Listened to at least one English-language local community radio station | Montreal (n=219) | Rest of Quebec (n=147) | Men (n=238) | Women (n=215) |
|---|------------------|------------------------|-----------------|---------------|
| | 19.2% | 30.8% | 28.2% | 20.2% |
| | 18 to 34 (n=88) | 35 to 54 (n=166) | 55 plus (n=199) | |
| | 51.0% | 25.4% | 8.0% | |
| Has not listened to any English-language local community radio station | Montreal (n=219) | Rest of Quebec (n=147) | Men (n=238) | Women (n=215) |
| | 80.8% | 69.2% | 71.8% | 79.8% |
| | 18 to 34 (n=88) | 35 to 54 (n=166) | 55 plus (n=199) | |
| | 49.0% | 74.6% | 92.0% | |

Q – In the past 12 months, have you listened to any of the following English-language local community radio stations? Please note all future reference to French-language local community radio stations refer to the following stations.
[SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.



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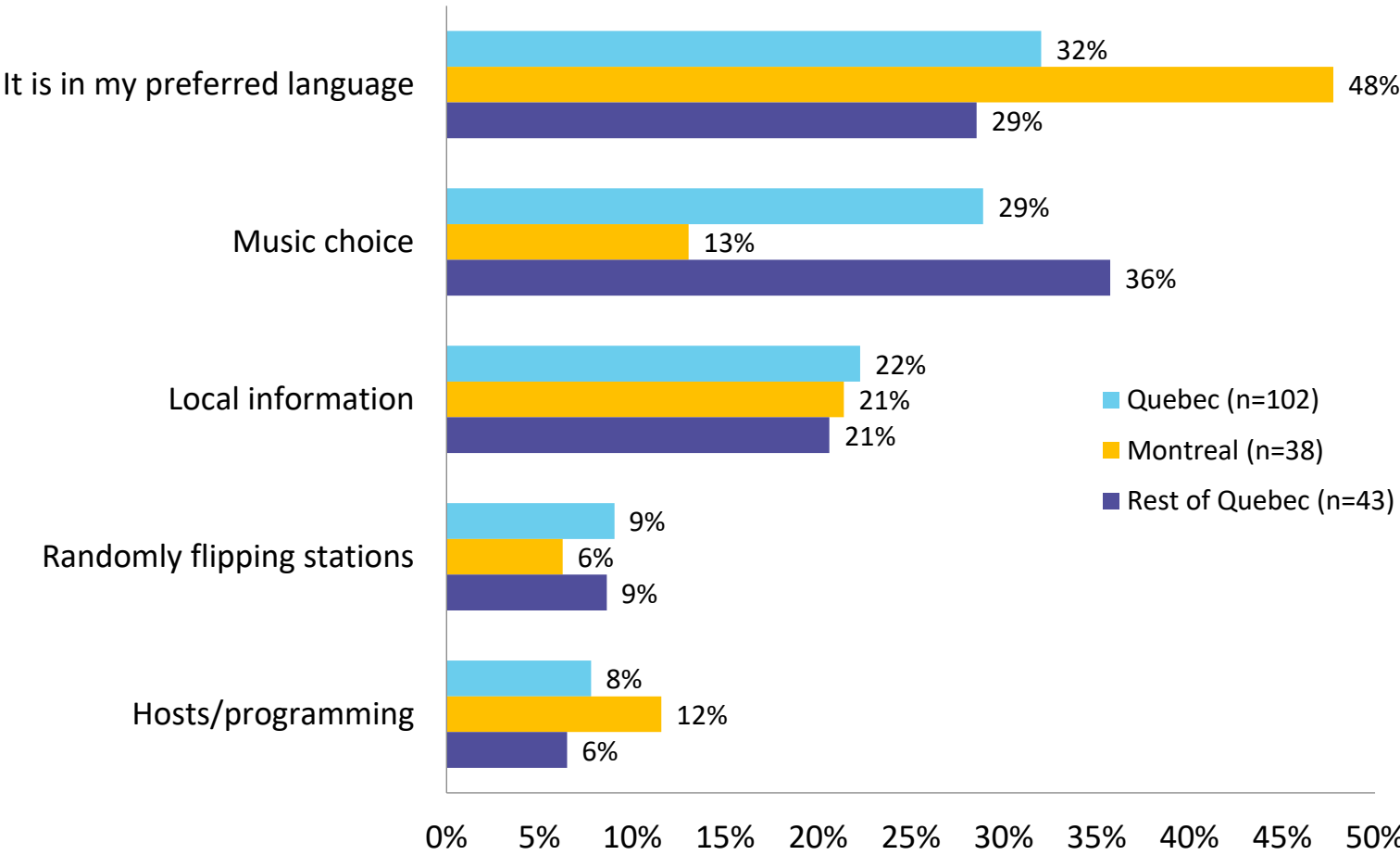


Residents of Quebec who report listening to a local community English-language radio station are most likely to say it is either because it is in their preferred language (32%) or because of the music choice (29%).

Residents of Montreal more often say they listen because it is in their preferred language (48%), while those from the rest of Quebec more often say the main reason is the music choice (36%).

Q – [EN][IF LISTENS TO LOCAL COMMUNITY RADIO]
What is the main reason you listen to English-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for listening to an English-language local community radio station



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=102 Anglophones in Quebec who report listening to English-language local community radio stations.

Anglophone women in Quebec (39%) more often say music is a main reason they listen to English-language community radio than men (21%). Younger Anglophones (47%) more often say they listen because it is in their preferred language than middle-aged Anglophones (17%).

Q – [IF LISTENS TO LOCAL COMMUNITY RADIO] What is the main reason you listen to English-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for listening to an English-language local community radio station – By age and gender

| | Quebec (n=102) | Men (n=60) | Women (n=42) | 18-34 (n=45) | 35-54 (n=42) | 55 plus (n=15)* |
|--------------------------------|-------------------|---------------|-----------------|-----------------|-----------------|--------------------|
| It is in my preferred language | 32.0% | 33.0% | 30.7% | 46.7% | 16.6% | |
| Music choice | 28.9% | 21.3% | 39.0% | 20.0% | 32.7% | |
| Local information | 22.3% | 25.3% | 18.3% | 17.7% | 30.5% | |
| Randomly flipping stations | 9.0% | 12.7% | 4.2% | 11.0% | 9.6% | |
| Hosts/programming | 7.8% | 7.8% | 7.8% | 4.5% | 10.6% | |

*Shaded due to small sample size

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=102 Anglophones in Quebec who report listening to English-language local community radio stations.



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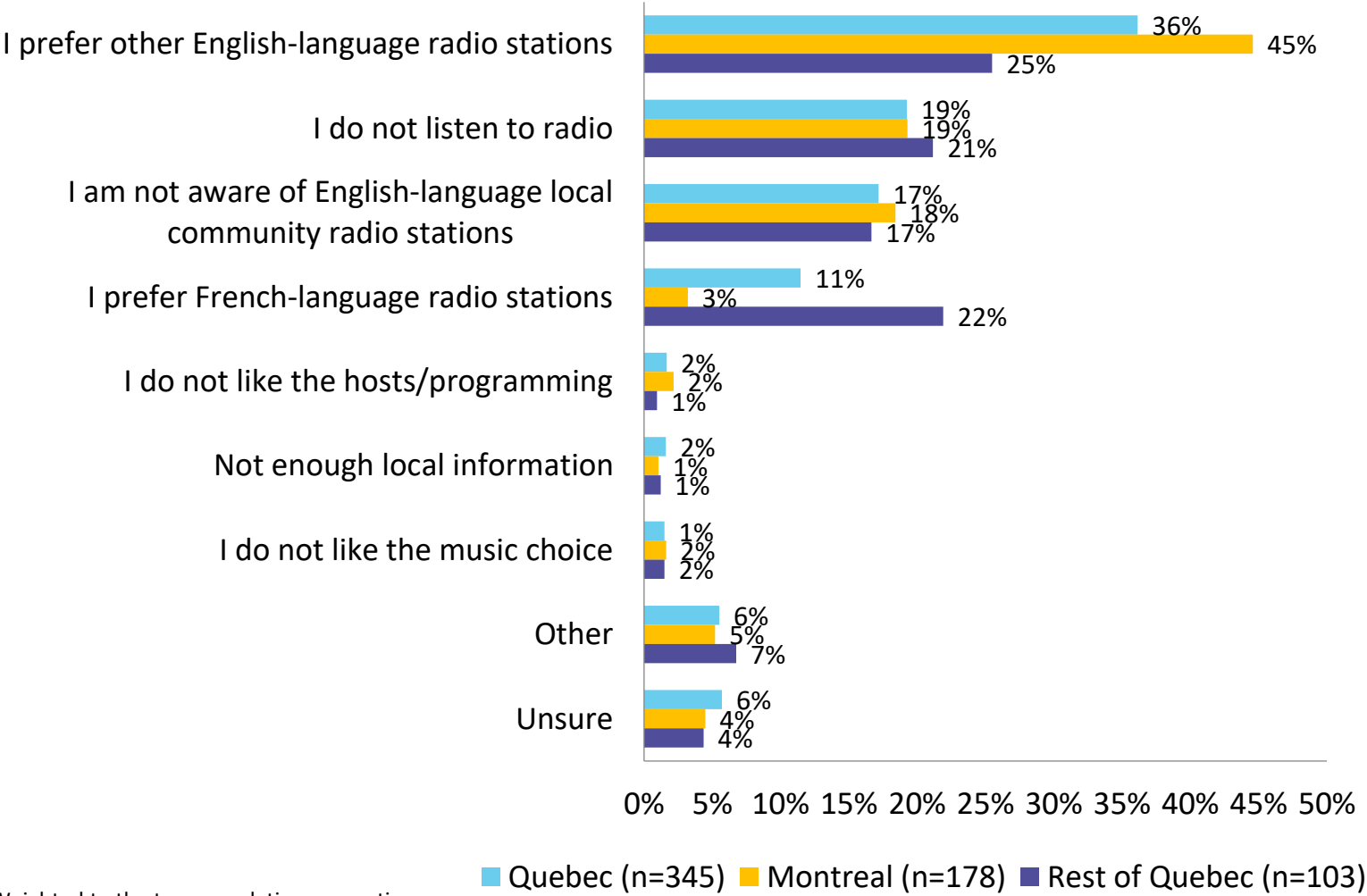


Anglophone residents of Quebec who report they do not listen to a local community radio station are most likely to say the main reason they do not listen is because they prefer other English-language radio stations.

Around one in five each say that they do not listen to radio or that they are not aware of English-language local community radio stations.

Q – [IF DOES NOT LISTEN TO LOCAL COMMUNITY RADIO] What is the main reason you do not listen to English-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for not listening to an English-language local community radio station – by region



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=345 Anglophones in Quebec who report not listening to English-language local community radio stations.

Older Quebec Anglophones aged 55 plus more often say they do not listen to a local community radio station because they prefer other English-language local community radio stations. However, younger Quebec Anglophones most often say they do not tune in because they prefer French-language radio stations.

Q – [EN][IF DOES NOT LISTEN TO LOCAL COMMUNITY RADIO] What is the main reason you do not listen to English-language local community radio stations? [SELECT ONE] [RANDOMIZE]

Main reasons for not listening to an English-language local community radio station – By age and gender

| | Quebec (n=345) | Men (n=173) | Women (n=172) | 18-34 (n=41) | 35-54 (n=123) | 55 plus (n=181) |
|---|-------------------|----------------|------------------|-----------------|------------------|--------------------|
| I prefer other English-language radio stations | 36.1% | 38.2% | 34.4% | 17.0% | 28.2% | 46.4% |
| I do not listen to radio | 19.2% | 17.1% | 21.1% | 24.4% | 22.9% | 15.6% |
| I am not aware of English-language local community radio stations | 17.2% | 20.3% | 14.5% | 14.6% | 15.0% | 19.2% |
| I prefer French-language radio stations | 11.5% | 9.6% | 13.0% | 31.8% | 11.7% | 5.4% |
| I do not like the hosts/programming | 1.7% | 1.1% | 2.1% | - | 4.4% | 0.5% |
| Not enough local information | 1.6% | 1.3% | 1.9% | 4.9% | 0.7% | 1.2% |
| I do not like the music choice | 1.5% | 2.6% | 0.6% | - | 2.9% | 1.1% |
| Unsure | 5.7% | 7.8% | 3.9% | 4.8% | 5.7% | 6.0% |
| Other | 5.5% | 2.0% | 8.5% | 2.5% | 8.4% | 4.7% |

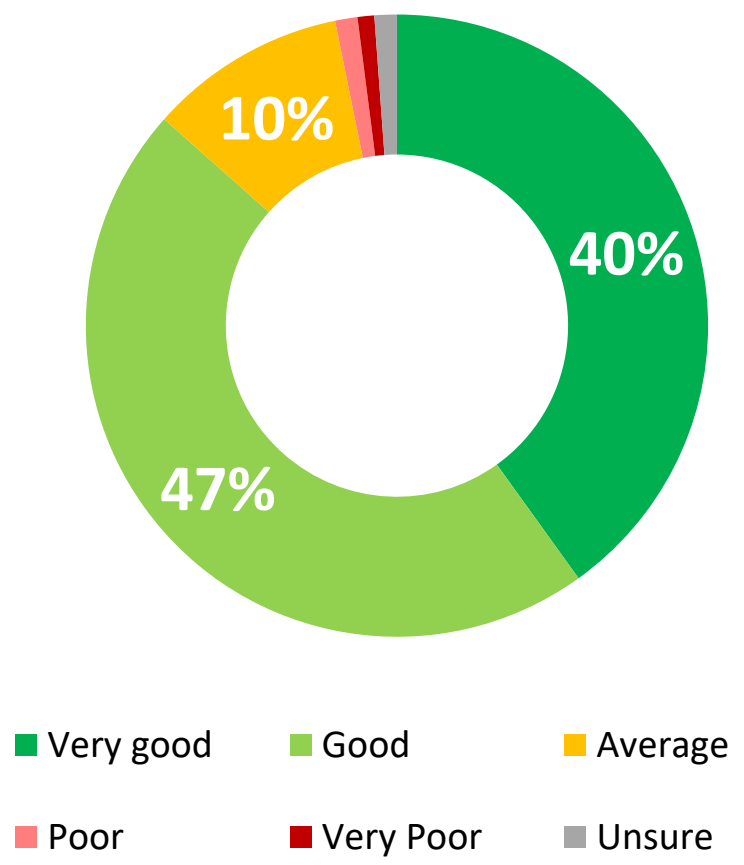
Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=345 Anglophones in Quebec who report not listening to English-language local community radio stations.



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Anglophones in Quebec



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Job done by local community radio stations at adapting to the needs and reflect realities of the community - ANGLOPHONES

| | Montreal (n=39) | Rest of Quebec (n=43) | Men (n=61) | Women (n=41) |
|----------------|--------------------|--------------------------|--------------------|-----------------|
| Very good/Good | 81.5% | 90.7% | 84.1% | 89.9% |
| | 18 to 34 (n=45) | 35 to 54 (n=41) | 55 plus (n=16)* | |
| | 91.1% | 84.1% | | |
| Very poor/Poor | 3.1% | - | 3.5% | - |
| | 18 to 34 (n=45) | 35 to 54 (n=41) | 55 plus (n=16)* | |
| | 2.2% | - | | |

*Shaded due to small sample size

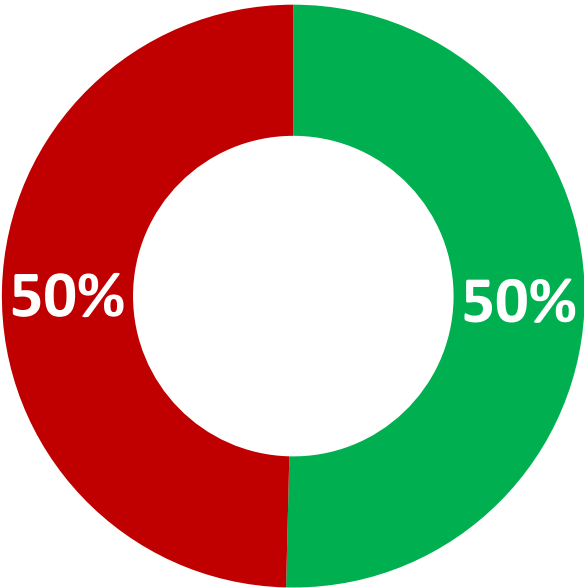
Q – [IF LISTENS TO LOCAL COMMUNITY RADIO] Do you believe that English-language local community radio stations do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=102 Anglophones in Quebec who report not listening to English-language local community radio stations.

A person wearing a green sweater is sitting at a round wooden table, reading a newspaper. A white cup of coffee sits on the table to the right. The scene is dimly lit, with a dark overlay on the image. The text 'Awareness – Newspapers (Anglophones in Quebec)' is overlaid on the left side of the image.

Awareness – Newspapers (Anglophones in Quebec)

Anglophones in Quebec



- Read at least one English-language local community newspaper
- Has not read any English-language local community newspaper

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Reading local community newspapers -
ANGLOPHONES

| Read at least one English-language local community newspaper | Island of Montreal (n=216) | Rest of Quebec (n=144) | Men (n=235) | Women (n=211) |
|--|----------------------------|------------------------|-----------------|---------------|
| | 59.0% | 38.4% | 52.2% | 48.7% |
| | 18 to 34 (n=86) | 35 to 54 (n=165) | 55 plus (n=195) | |
| | 53.4% | 41.8% | 55.0% | |
| Has not read any English-language local community newspaper | Island of Montreal (n=216) | Rest of Quebec (n=144) | Men (n=235) | Women (n=211) |
| | 41.0% | 61.6% | 47.8% | 51.3% |
| | 18 to 34 (n=86) | 35 to 54 (n=165) | 55 plus (n=195) | |
| | 46.6% | 58.2% | 45.0% | |

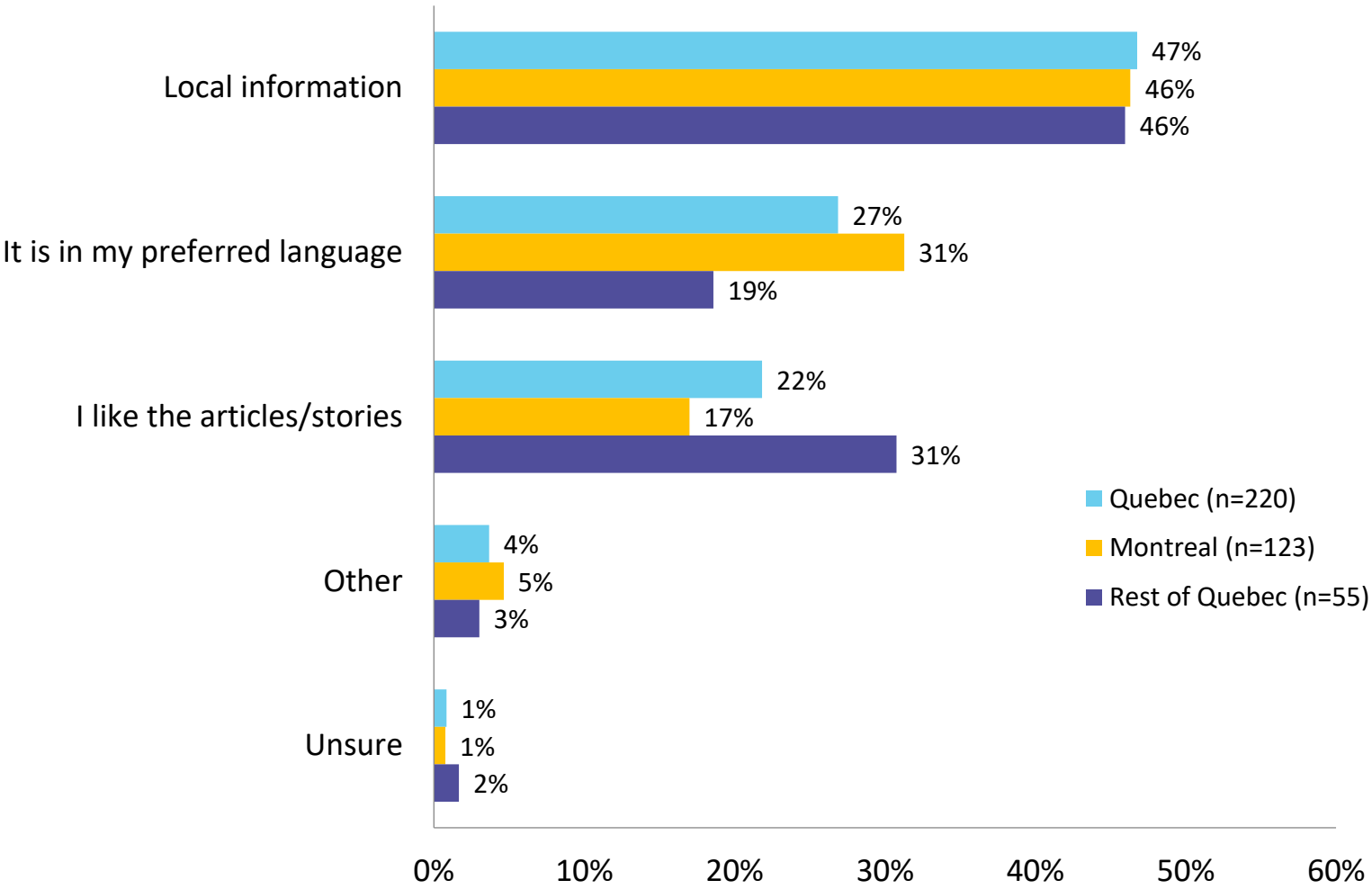
Q – In the past 12 months, have you read any of the following English-language local community newspapers? Please note all future reference to English-language local community newspapers refer to the following newspapers. [SELECT ALL THAT APPLY]

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=453 Anglophones in Quebec.

Both residents of Montreal and the rest of the province are most likely to say the main reason they read an English-language local community newspaper is for local information (47%). However, those in Montreal who report reading English-language local community newspapers more often say they read these newspapers because it is in their preferred language (31%) than those in the rest of Quebec (19%), while those outside of Montreal more often say it is because they like the articles and stories than those in Montreal.

Q – [IF READS LOCAL COMMUNITY NEWSPAPERS]
What is the main reason you read English-language local community newspapers?[RANDOMIZE]

Main reasons for reading an English-language local community newspaper



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

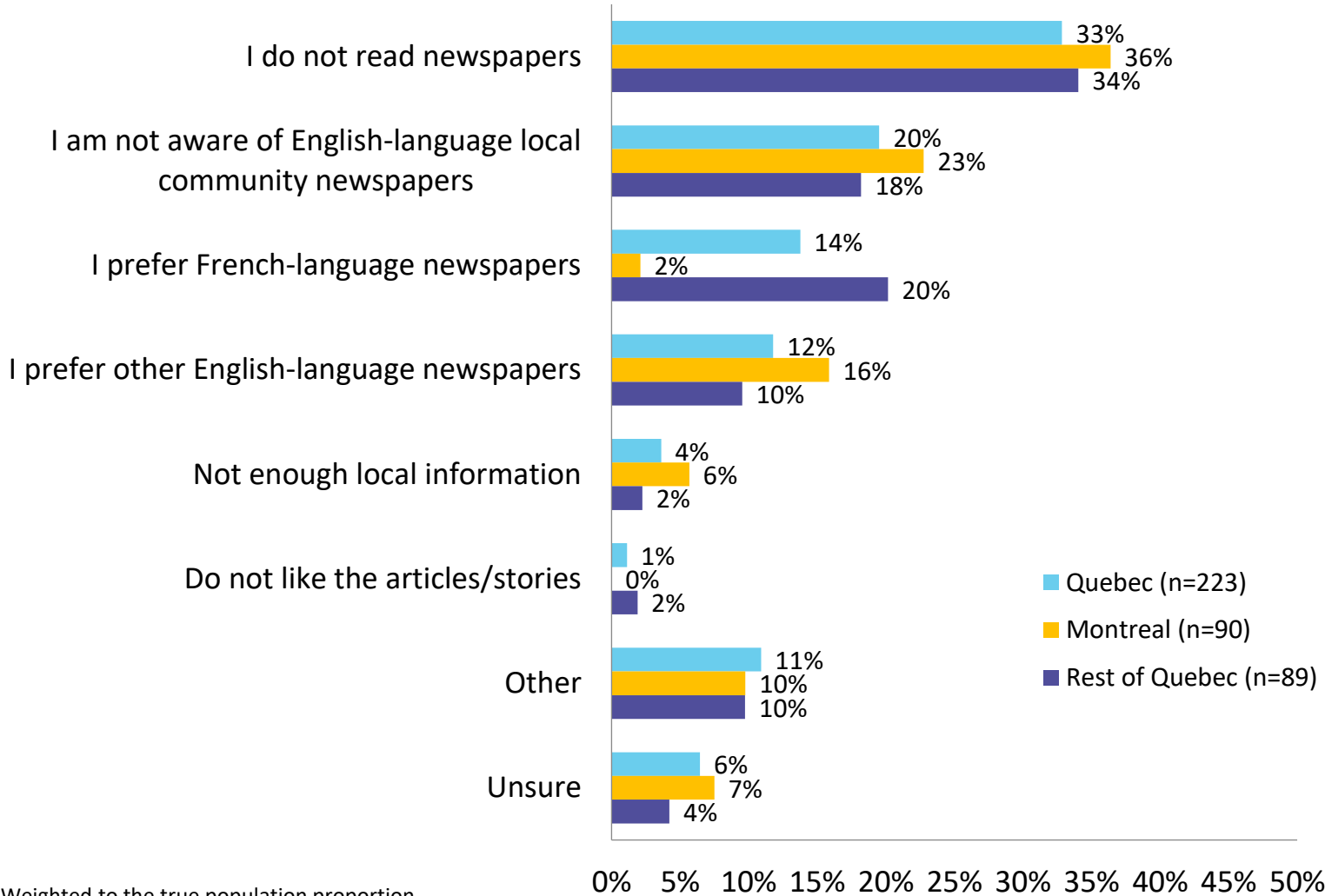
Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=220 Anglophones in Quebec.

Anglophone residents outside of Montreal who report they do not read a local community newspaper say more frequently that the main reason they do not read them is because they prefer French-language newspapers than those who reside in Montreal.

Of note, around one in three respondents say it is because they do not read newspapers at all.

Q – [IF DOES NOT READ LOCAL COMMUNITY NEWSPAPER] What is the main reason you do not read English-language local community newspapers? [SELECT ONE][RANDOMIZE]

Main reasons for not reading an English-language local community newspaper – ANGLOPHONES IN QUEBEC



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

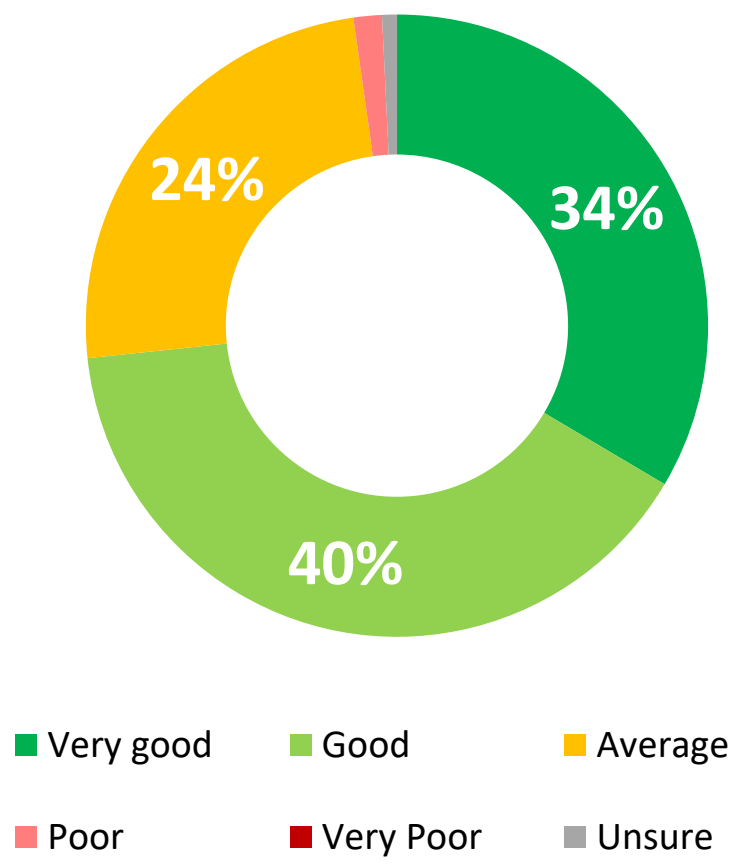
Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=223 Anglophones in Quebec.



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Anglophones in Quebec



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Job done by English-language local community newspapers at adapting to the needs and reflect realities of the community - ANGLOPHONES

| | Montreal (n=125) | Rest of Quebec (n=55) | Men (n=121) | Women (n=100) |
|----------------|---------------------|--------------------------|--------------------|------------------|
| Very good/Good | 70.5% | 81.7% | 70.4% | 76.4% |
| | 18 to 34 (n=46) | 35 to 54 (n=70) | 55 plus (n=105) | |
| | 73.8% | 80.1% | 69.2% | |
| Very poor/Poor | 1.8% | - | 0.8% | 2.2% |
| | 18 to 34 (n=46) | 35 to 54 (n=70) | 55 plus (n=105) | |
| | 2.2% | - | 1.9% | |

Q – [IF READS LOCAL COMMUNITY NEWSPAPERS] Do you believe that English-language local community newspapers do a very good, good, average, poor or very poor job at adapting to answer the needs and reflect the realities of your community?

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=221 Anglophones in Quebec who read an English-language local community newspaper.

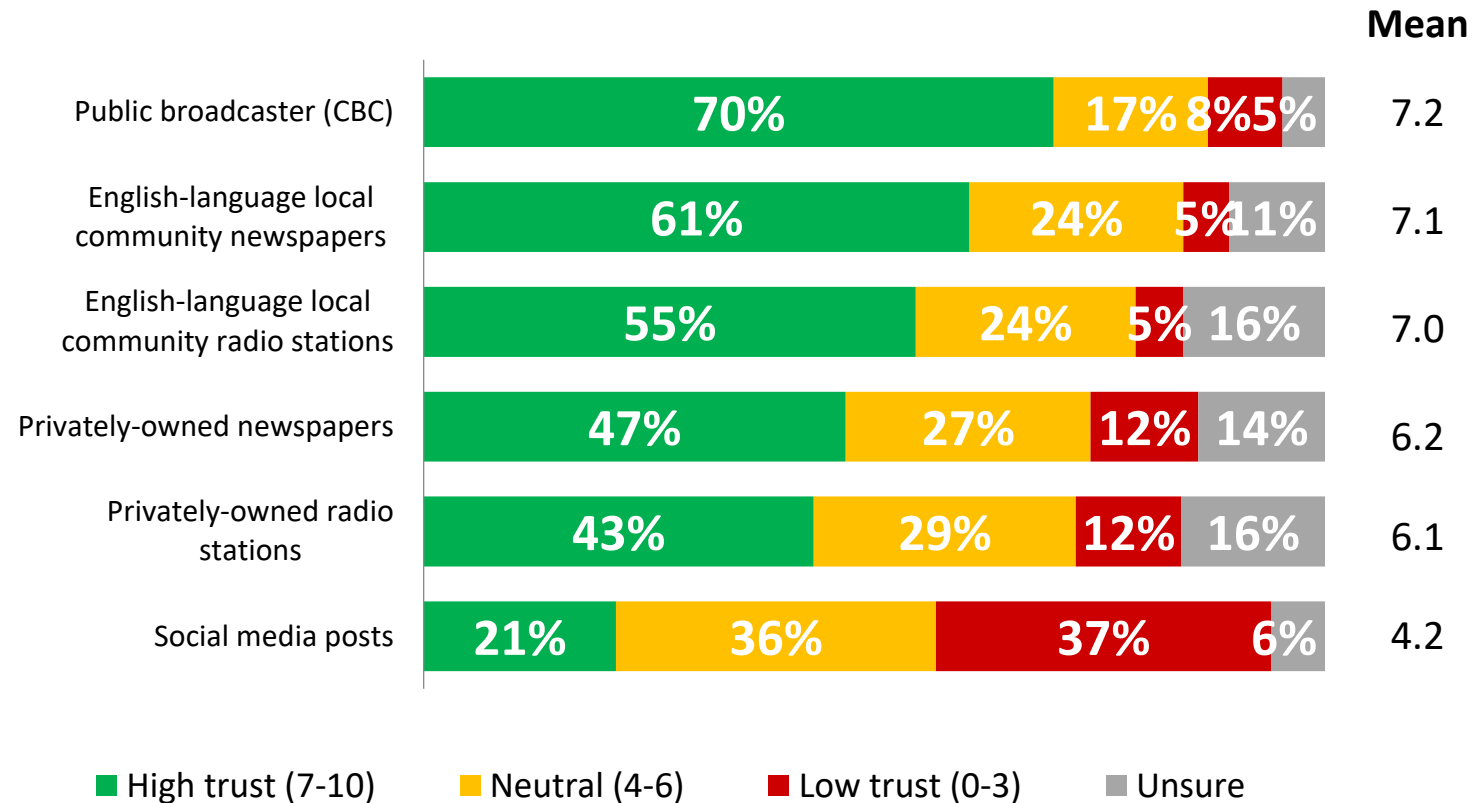
Perceptions of OLMC media (Anglophones in Quebec)



Trust in media - ANGLOPHONES

Anglophones in Quebec have the most trust in the information from public broadcasters (70%), and trust information from social media posts (37%) the least. This is consistent throughout Quebec. Although younger Anglophone Quebecers (18-34) still rate their trust in social media posts the lowest, they give this a higher trust score compared to other age groups.

Q – On a scale of 0 to 10, where 0 is no trust and 10 is complete trust, please rate how much you trust the information from the following sources: [RANDOMIZE]



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=452 Anglophones in Quebec.



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Trust in media by demographics – ANGLOPHONES

Q – On a scale of 0 to 10, where 0 is no trust and 10 is complete trust, please rate how much you trust the information from the following sources:

[RANDOMIZE]

| MEAN | | Quebec (n=452) | Montreal (n=219) | Rest of Quebec (n=147) | Men (n=237) | Women (n=215) | 18-34 (n=87) | 35-54 (n=166) | 55 plus (n=199) |
|------|--|-------------------|---------------------|------------------------------|----------------|------------------|-----------------|------------------|--------------------|
| | Public broadcaster (CBC) | 7.2 | 7.3 | 7.2 | 7.1 | 7.4 | 7.1 | 6.9 | 7.5 |
| | English-language local community newspapers | 7.1 | 7.2 | 7.1 | 6.9 | 7.3 | 6.8 | 6.9 | 7.4 |
| | English-language local community radio stations | 7.0 | 7.2 | 6.8 | 6.9 | 7.0 | 6.8 | 6.7 | 7.2 |
| | Privately-owned newspapers | 6.2 | 6.2 | 6.4 | 6.2 | 6.3 | 6.5 | 6.0 | 6.3 |
| | Privately-owned radio stations | 6.1 | 6.1 | 6.1 | 6.2 | 6.0 | 6.5 | 5.9 | 6.1 |
| | Social media posts | 4.2 | 3.8 | 4.4 | 4.4 | 4.0 | 5.3 | 4.2 | 3.5 |

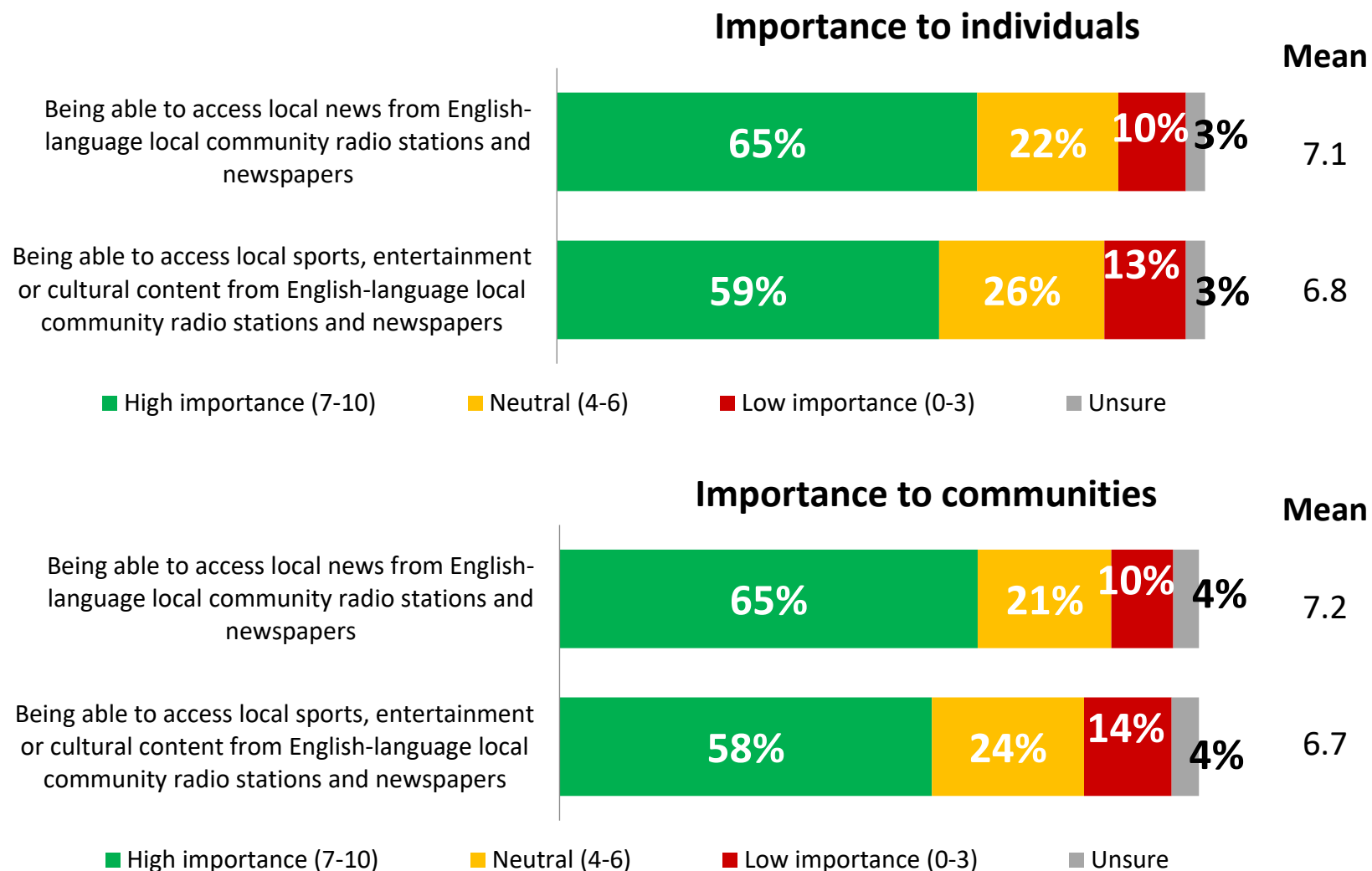
Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=452 Anglophones in Quebec.

Anglophones in Quebec are marginally more likely to say that being able to access news from English-language local community sources is important than access to local sports, entertainment or cultural content to both themselves and their community. Residents of Montreal generally give higher importance scores to themselves and their community than those in the rest of Quebec, as do older Anglophone Quebecers compared to younger Quebecers.

Q – On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to you: [ROTATE]

Q – On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to your community: [ROTATE]

Importance of OLMC media - ANGLOPHONES



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=452 Anglophones in Quebec.

Importance of OLMC media roles by demographics - ANLGOPHONES

Q – [EN] On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important, how important are the following to you: [ROTATE]

| | | Importance to individuals | | | | | | | |
|------|---|---------------------------|---------------------|------------------------------|----------------|------------------|-----------------|------------------|--------------------|
| | | Quebec (n=450) | Montreal (n=219) | Rest of Quebec (n=146) | Men (n=236) | Women (n=214) | 18-34 (n=86) | 35-54 (n=166) | 55 plus (n=198) |
| MEAN | Being able to access local news from English-language local community radio stations and newspapers | 7.1 | 7.5 | 6.3 | 7.0 | 7.2 | 6.5 | 7.0 | 7.5 |
| | Being able to access local sports, entertainment or cultural content from English-language local community radio stations and newspapers | 6.8 | 7.2 | 5.9 | 6.7 | 6.8 | 6.4 | 6.8 | 6.9 |
| | | Importance to communities | | | | | | | |
| | | Quebec (n=452) | Montreal (n=219) | Rest of Quebec (n=147) | Men (n=237) | Women (n=215) | 18-34 (n=87) | 35-54 (n=166) | 55 plus (n=199) |
| MEAN | Being able to access local news from English-language local community radio stations and newspapers | 7.2 | 7.8 | 6.4 | 7.0 | 7.4 | 6.8 | 7.2 | 7.5 |
| | Being able to access local sports, entertainment or cultural content from English-language local community radio stations and newspapers | 6.7 | 7.1 | 5.9 | 6.5 | 6.8 | 6.4 | 6.6 | 6.9 |

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=452 Anglophones in Quebec.



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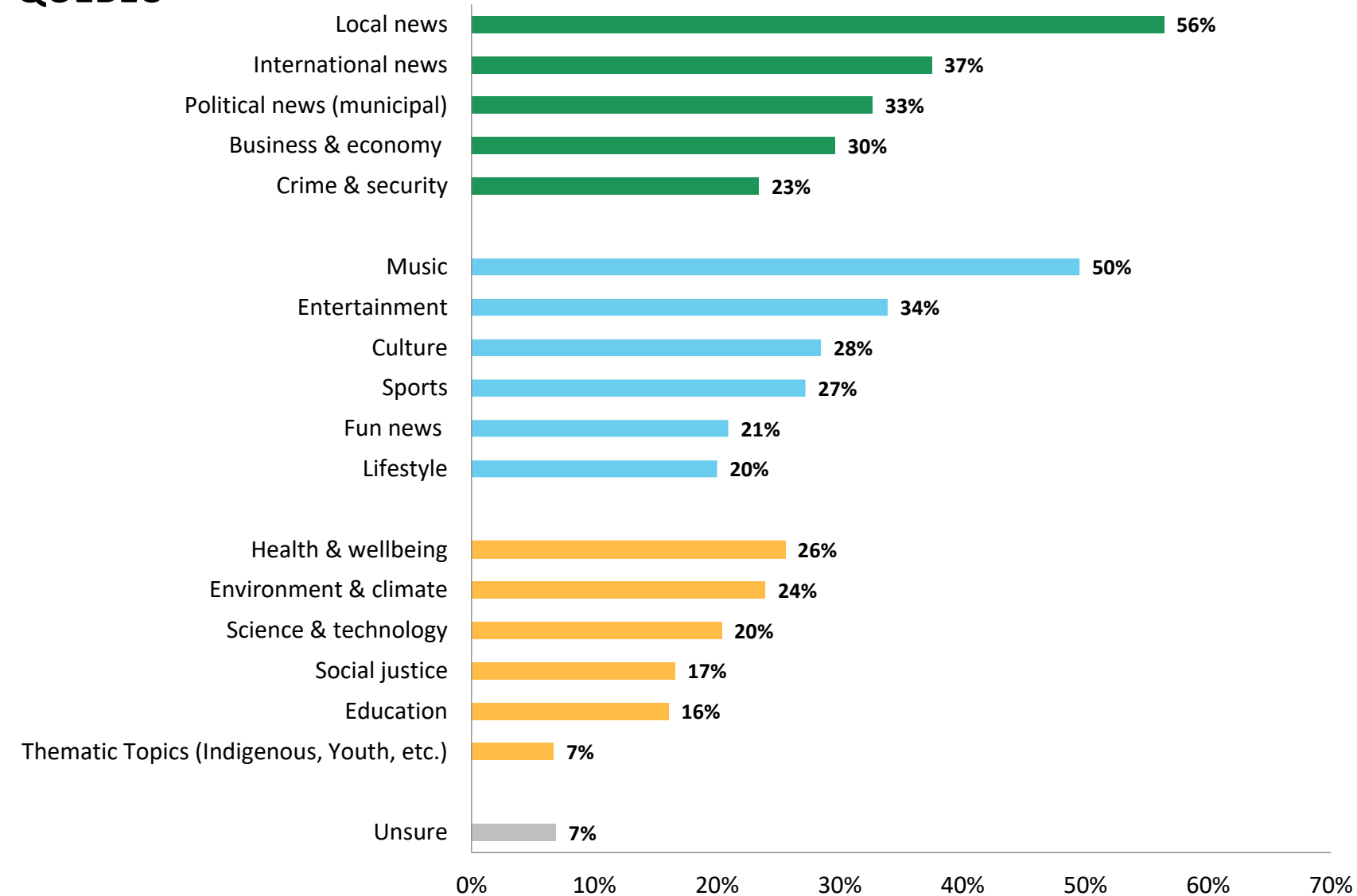
A man with a beard and short hair is shown in profile, facing right. He is wearing large black headphones and is positioned in front of a professional condenser microphone. The microphone is mounted on a boom arm and has a circular pop filter in front of it. The background is dark and out of focus, suggesting a recording studio environment. A laptop is visible in the lower right corner. The overall lighting is dim, with some highlights on the man's face and the microphone.

Desired content on OLMC media (Anglophones
in Quebec)

Overall, the top preferred programming for English-language local community radio stations are local news (56%), followed by music (50%). Those residing in Montreal are comparatively more likely to say they prefer local news, entertainment, municipal political news and business and economy content than those outside Montreal.

Q – [EN] Please select the following types of English-language local community radio station programming that are the most likely to entice you to listen.
[SELECT ALL THAT APPLY] [RANDOMIZE]

Preferred programming for OLMC radio stations – ANGLOPHONES IN QUEBEC



*Based on multiple response options.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=448 Anglophones in Quebec.



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Preferred programming for OLMC radio stations – BY DEMOGRAPHICS

In Quebec, Anglophones aged 55 and over report being more likely to listen to local English-language community radio for local news (71%) than Anglophones aged 18-34 (32%) or 35-54 (56%), while those aged 18-34 and 35-54 are more likely to listen for music (51% and 59% respectively).

Anglophone women are more likely than Anglophone men to listen to local English-language community radio for culture (34% for women, 23% for men), entertainment (38% for women, 30% for men) and health and well-being (34% for women, 17% for men). Anglophone men are more likely than Anglophone women to prefer it for sports (37% for men, 18% for women).

Q – Please select the following types of English-language local community radio station programming that are the most likely to entice you to listen.
[SELECT ALL THAT APPLY] [RANDOMIZE]

| | Quebec (n=448) | Montreal (n=219) | Rest of Quebec (n=144) | Men (n=234) | Women (n=214) | 18-34 (n=87) | 35-54 (n=162) | 55 plus (n=199) |
|---|-------------------|---------------------|------------------------------|----------------|------------------|-----------------|------------------|--------------------|
| Local news | 56.4% | 65.3% | 50.1% | 53.1% | 59.5% | 32.3% | 55.6% | 70.5% |
| Music | 49.5% | 47.2% | 54.2% | 48.7% | 50.3% | 50.6% | 58.5% | 42.6% |
| International news | 37.5% | 39.7% | 34.8% | 35.3% | 39.6% | 16.1% | 39.6% | 48.0% |
| Entertainment | 33.9% | 36.9% | 25.1% | 29.7% | 37.8% | 36.8% | 35.9% | 30.9% |
| Political news (municipal) | 32.6% | 38.2% | 26.4% | 30.4% | 34.8% | 23.0% | 27.2% | 41.9% |
| Business & economy | 29.6% | 34.6% | 20.6% | 31.3% | 28.0% | 33.3% | 26.1% | 30.0% |
| Culture | 28.5% | 30.5% | 24.8% | 22.9% | 33.8% | 24.2% | 29.5% | 30.2% |
| Sports | 27.2% | 24.7% | 25.7% | 36.5% | 18.3% | 25.1% | 28.1% | 27.7% |
| Health & wellbeing | 25.5% | 28.5% | 19.0% | 16.5% | 34.1% | 15.0% | 24.6% | 32.2% |
| Environment & climate | 23.9% | 24.8% | 21.2% | 22.7% | 25.1% | 21.9% | 18.6% | 28.9% |
| Crime & security | 23.4% | 20.3% | 27.2% | 20.3% | 26.4% | 27.6% | 20.3% | 23.2% |
| Fun news | 20.9% | 17.7% | 20.6% | 18.5% | 23.2% | 24.2% | 23.6% | 17.1% |
| Science & technology | 20.4% | 20.4% | 18.4% | 22.5% | 18.4% | 20.7% | 21.0% | 19.8% |
| Lifestyle | 20.0% | 21.3% | 15.4% | 15.5% | 24.3% | 18.4% | 20.8% | 20.4% |
| Social justice | 16.6% | 15.4% | 15.5% | 15.3% | 17.8% | 12.7% | 17.0% | 18.5% |
| Education | 16.1% | 14.3% | 15.2% | 15.8% | 16.3% | 16.1% | 13.1% | 18.2% |
| Thematic Topics (Indigenous, Youth, etc.) | 6.7% | 5.1% | 7.9% | 3.1% | 10.2% | 8.1% | 6.3% | 6.2% |
| Unsure | 6.9% | 5.1% | 7.9% | 7.3% | 6.4% | 6.9% | 7.4% | 6.6% |

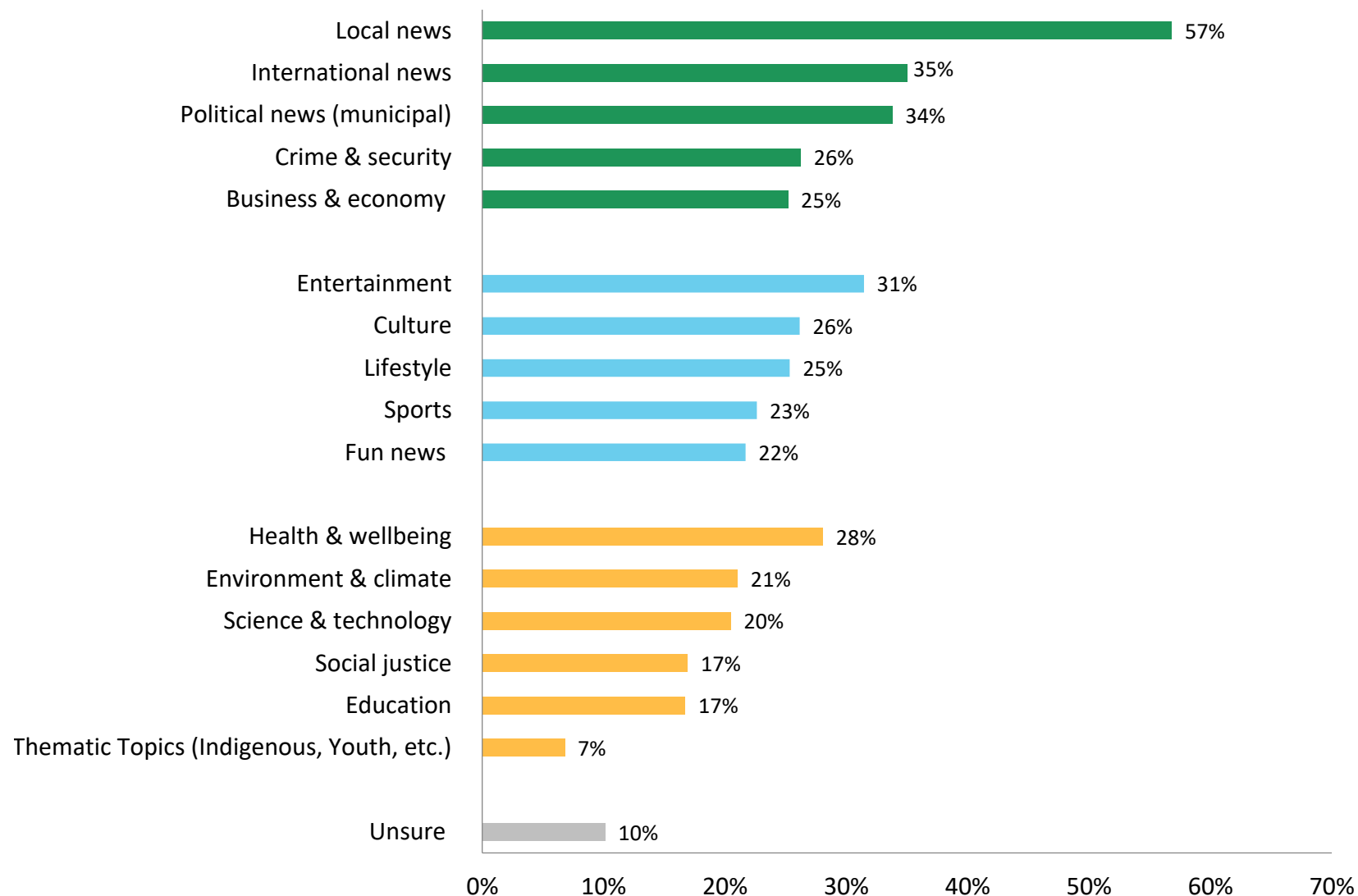
*Based on multiple response options.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=448 Anglophones in Quebec.

Montreal residents are more likely to prefer local news, municipal political news, business & economy and health & wellbeing content to be enticed to read local English-language community newspapers than those outside Montreal.

Q – Please select the following types of English-language local community newspaper content that are the most likely to entice you to read.
[RANDOMIZE] [SELECT ALL THAT APPLY]

Preferred content for OLMC newspapers – ANGLOPHONES IN QUEBEC



*Based on multiple response options.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=447 Anglophones in Quebec.

Preferred content for OLMC newspapers

Women are more likely to prefer local news, entertainment, lifestyle, and health & wellbeing content than men, while men are more likely to prefer sports and science & technology content than women.

Older Canadians are more likely to prefer local news, municipal news and health & wellbeing content than younger Canadians, while younger Canadians are more likely to prefer science & technology content.

Q – Please select the following types of English-language local community newspaper content that are the most likely to entice you to read.
[RANDOMIZE] [SELECT ALL THAT APPLY]

| | Quebec (n=447) | Montreal (n=219) | Rest of Quebec (n=144) | Men (n=235) | Women (n=212) | 18-34 (n=87) | 35-54 (n=163) | 55 plus (n=197) |
|---|-------------------|---------------------|------------------------------|----------------|------------------|-----------------|------------------|--------------------|
| Local news | 56.8% | 62.4% | 51.8% | 51.8% | 61.7% | 40.3% | 53.9% | 68.3% |
| International news | 35.0% | 36.3% | 33.3% | 34.0% | 36.0% | 31.0% | 35.9% | 36.6% |
| Political news (municipal) | 33.8% | 41.1% | 24.3% | 33.0% | 34.6% | 24.1% | 28.2% | 43.3% |
| Entertainment | 31.5% | 32.1% | 25.1% | 26.3% | 36.4% | 32.2% | 31.0% | 31.4% |
| Health & wellbeing | 28.1% | 34.3% | 22.3% | 18.6% | 37.2% | 19.6% | 27.3% | 33.4% |
| Crime & security | 26.2% | 26.7% | 25.7% | 22.6% | 29.7% | 26.5% | 22.0% | 29.2% |
| Culture | 26.2% | 30.3% | 21.6% | 20.8% | 31.3% | 20.7% | 28.2% | 27.7% |
| Lifestyle | 25.3% | 24.1% | 25.5% | 19.2% | 31.2% | 25.3% | 26.9% | 24.3% |
| Business & economy | 25.2% | 33.7% | 14.9% | 28.1% | 22.4% | 26.4% | 27.2% | 23.1% |
| Sports | 22.6% | 21.9% | 20.4% | 28.0% | 17.4% | 24.1% | 22.5% | 21.9% |
| Fun news | 21.7% | 22.8% | 19.2% | 20.1% | 23.2% | 21.8% | 27.8% | 17.2% |
| Environment & climate | 21.1% | 19.6% | 24.1% | 18.1% | 23.9% | 15.0% | 20.9% | 24.6% |
| Science & technology | 20.5% | 23.0% | 15.1% | 25.7% | 15.5% | 32.1% | 21.3% | 13.3% |
| Social justice | 16.9% | 17.0% | 17.7% | 14.4% | 19.4% | 15.0% | 18.7% | 16.8% |
| Education | 16.7% | 18.6% | 15.0% | 13.4% | 19.9% | 14.9% | 18.6% | 16.4% |
| Thematic Topics (Indigenous, Youth, etc.) | 6.8% | 6.2% | 7.1% | 4.8% | 8.8% | 10.4% | 6.2% | 5.2% |
| Unsure | 10.1% | 6.9% | 14.7% | 12.3% | 8.1% | 9.2% | 12.4% | 9.0% |

*Based on multiple response options.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=447 Anglophones in Quebec.



Sources of local content (news) related to communities

Source of news related to communities – ANGLOPHONES

Q – [EN] Please select your top three main sources of local news in your community. [SELECT UP TO 3] [RANDOMIZE]

| | Quebec (n=452) | Montreal (n=219) | Rest of Quebec (n=147) | Men (n=237) | Women (n=215) | 18-34 (n=87) | 35-54 (n=166) | 55 plus (n=199) |
|--|-------------------|---------------------|------------------------------|----------------|------------------|-----------------|------------------|--------------------|
| National television (such as CTV News, BNN) | 36.5% | 39.5% | 28.8% | 38.4% | 34.7% | 27.5% | 30.1% | 46.2% |
| Public broadcasters (such as CBC, Radio-Canada, Télé-Québec) | 34.5% | 34.5% | 38.7% | 31.0% | 37.9% | 32.2% | 36.4% | 34.5% |
| English-language local television | 29.6% | 35.8% | 18.6% | 29.3% | 29.8% | 15.0% | 25.9% | 40.4% |
| English-language local community newspapers | 21.6% | 30.0% | 13.4% | 19.2% | 24.0% | 12.7% | 16.9% | 30.1% |
| English-language local news websites/apps | 20.2% | 26.5% | 12.0% | 20.8% | 19.7% | 22.9% | 21.2% | 18.0% |
| National news websites/apps | 19.4% | 18.8% | 19.9% | 20.7% | 18.2% | 20.7% | 20.8% | 17.7% |
| English-language local community radio stations | 16.8% | 20.1% | 14.5% | 14.5% | 19.0% | 20.7% | 14.0% | 16.7% |
| French-language newspapers | 15.9% | 8.5% | 26.0% | 16.8% | 15.0% | 18.4% | 18.9% | 12.3% |
| French-language radio stations | 13.0% | 4.7% | 24.5% | 11.7% | 14.1% | 16.2% | 16.0% | 8.9% |
| English-language social media posts | 12.9% | 13.8% | 12.2% | 13.1% | 12.7% | 19.5% | 12.4% | 9.5% |
| National newspapers (such as Globe and Mail, National Post) | 10.7% | 11.3% | 9.9% | 12.3% | 9.0% | 12.7% | 12.9% | 7.9% |
| French-language social media posts | 9.0% | 4.9% | 13.3% | 8.7% | 9.2% | 18.5% | 9.9% | 3.0% |
| Unsure | 5.8% | 5.3% | 7.3% | 5.4% | 6.2% | 9.2% | 4.2% | 5.1% |
| Other | 3.6% | 4.2% | 4.3% | 5.6% | 1.8% | - | 4.1% | 5.3% |

*Based on multiple response options.

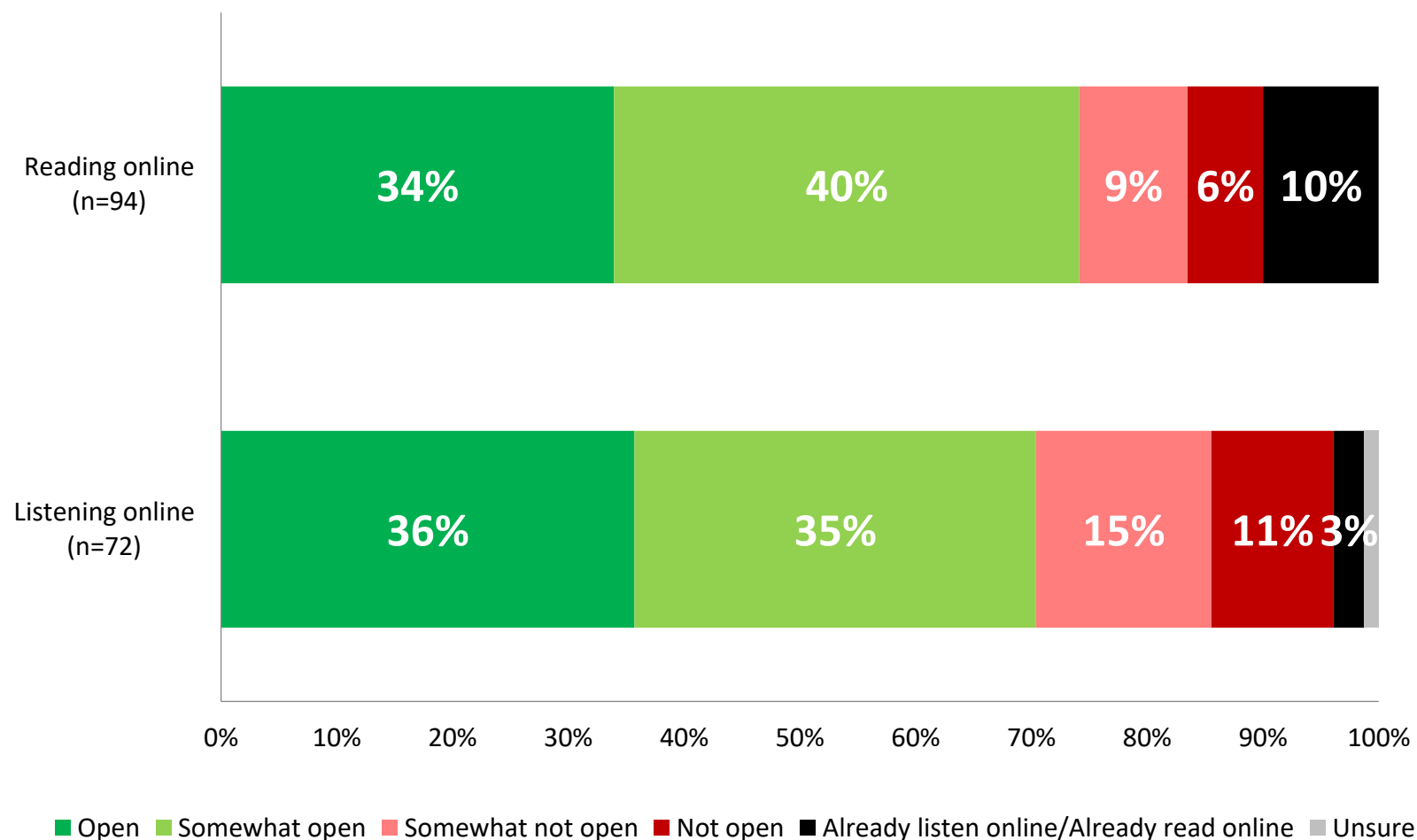
Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=452 Anglophones in Quebec.

A majority of Anglophones in Quebec who say local community English-language radio stations or newspapers are a top three source of local news for them say they are open or somewhat open to listening or reading online.

Q – [IF SELECTS LOCAL COMMUNITY RADIO STATIONS IN Q21] If your English-language local community radio stations were no longer available on traditional radio frequencies, would you be open, somewhat open, somewhat not open or not open to listening online?

Q – [IF SELECTS LOCAL COMMUNITY NEWSPAPERS IN Q21] If your English-language local community newspapers were no longer available in traditional print, would you be open, somewhat open, somewhat not open or not open to reading online?

Level of openness to listening to radio online and reading newspapers online – ANGLOPHONES



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, representative online survey, March 10th to April 15th, 2025, n=94 Anglophones in Quebec who say English-language local community radio stations or newspapers are a top three source of local news for them.

METHODOLOGY

Nanos conducted a representative non-probability online survey of 666 Francophones outside Quebec, 18 years of age or older, between March 10th and April 15th, 2025. A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 666 respondents would have a margin of error of ± 3.8 percentage points, 19 times out of 20. The sample is geographically stratified to be representative of Francophones in Canada outside Quebec, and distribution was limited to a set of postal codes that include distribution areas of French-language local community radio stations and newspapers.

Nanos conducted a representative non-probability online survey of 453 Anglophones in Quebec, 18 years of age or older, between March 10th and April 15th, 2025. A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 666 respondents would have a margin of error of ± 4.6 percentage points, 19 times out of 20. The sample is geographically stratified to be representative of Anglophones in Quebec, and distribution was limited to a set of postal codes that include distribution areas of English-language local community radio stations and newspapers.

The research was commissioned by the Consortium of Official Language Minority Community Media and was conducted by Nanos Research.

Full data tables with weighted and unweighted number of interviews is here: [by region age and gender \(French\)](#); [by intensity \(French\)](#); [by region age and gender \(English\)](#); [by intensity \(English\)](#).

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



| Element | Description | Element | Description |
|--|---|-----------------------------------|--|
| Research sponsor | Consortium of Official Language Minority Community Media | 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 regions of Francophones in Canada outside Quebec and Anglophones in Quebec. See tables for full weighting disclosure. |
| Population and Final Sample Size | 666 Francophones outside Quebec and 453 Anglophones in Quebec | 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. |
| Source of Sample | Sago | Excluded Demographics | Individuals younger than 18 years old; individuals without internet access, individuals who are not an official language minority could not participate. |
| Type of Sample | Representative non-probability | Stratification | By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Francophones in Canada outside Quebec and Anglophones in Quebec. |
| Margin of Error (for a comparative probability sample) | For comparison purposes, a probability sample of 666 respondents would have a margin of error of ± 3.8 percentage points and a probability sample of 453 respondents would have a margin of error of ± 4.6 percentage points, 19 times out of 20. | Estimated Response Rate | Not applicable |
| Mode of Survey | Online survey | Question Order | Question order in the preceding report reflects the order in which they appeared in the original questionnaire. |
| Sampling Method Base | Non-probability | Question Content | All questions asked are contained in the report. |
| Demographics (Captured) | Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years or older within the area of distribution of OLMC radio stations and newspapers. Six-digit postal code was used to validate geography. | Question Wording | The questions in the preceding report are written exactly as they were asked to individuals. |
| Demographics (Other) | Age, gender, education, income, immigration status | Research/Data Collection Supplier | Nanos Research |
| Field Dates | March 10 th to April 15 th , 2025. | Contact | Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com . |
| Language of Survey | The survey was conducted in English in Quebec and in French in the rest of Canada. | Data Tables | [FR] By region, age and gender [FR] By intensity [EN] By region, age and gender [EN] By intensity |
| Standards | Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/ | | |



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EthicStratēgies

Ethic Strategies was created by the founding partners of [PAA Advisory](http://www.paaadvisory.com) and the [Nanos Research Corporation](http://www.nanos.co), both recognized leaders in research, advocacy, and advisory. Ethic provides bespoke strategic counsel, advice, and communications strategies to organizations facing serious issues. www.ethicstrategies.com

Any questions?



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