



# **OPINION LEADER SURVEY: FOLLOW-UP AND COMPARATIVE DATA**

**Presented to the Board of Directors**

**By William B. Chambers**

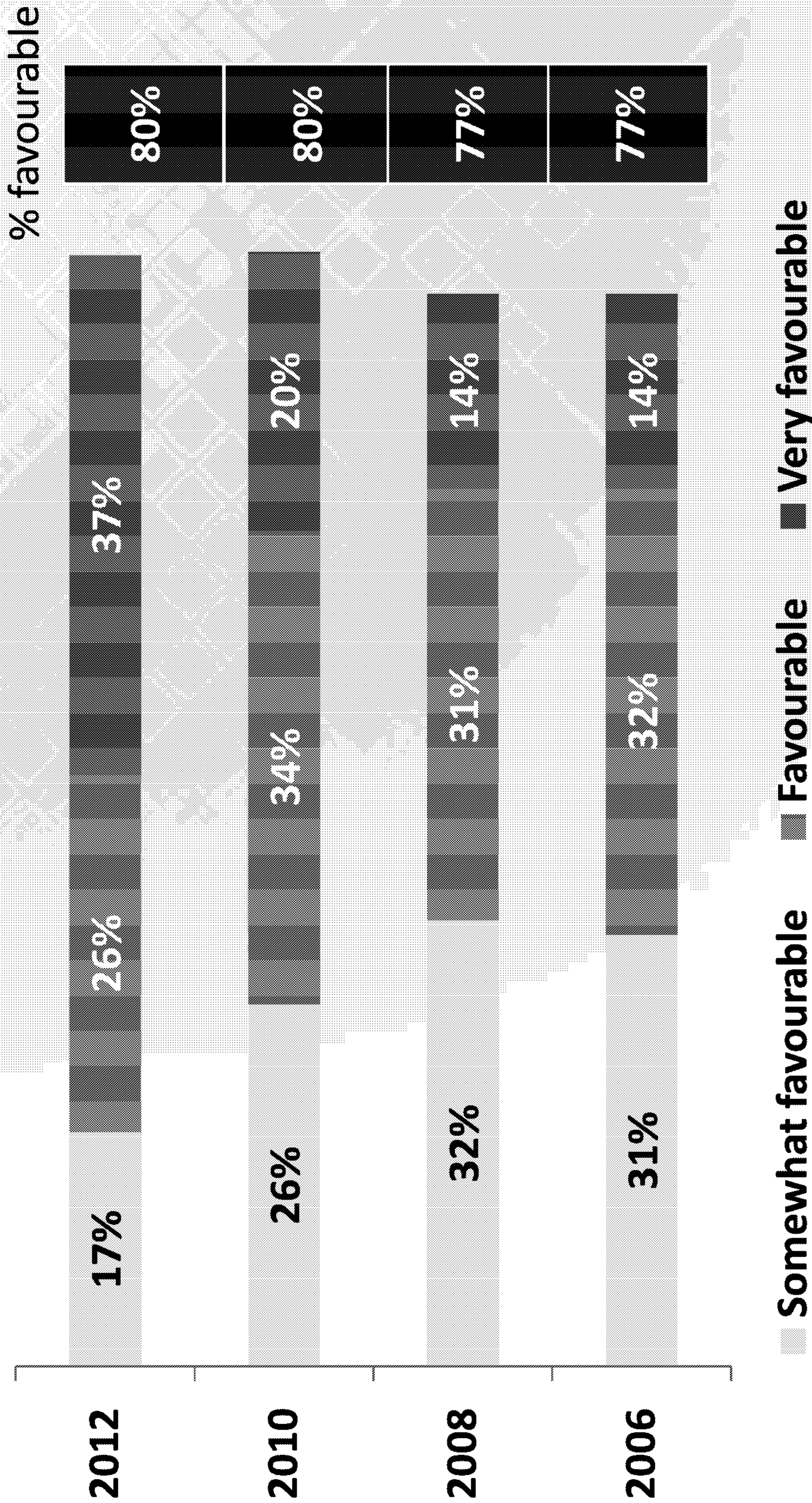
**March 2012**

**CBC  Radio-Canada**



# OVERALL IMPRESSION OF CBC/RADIO-CANADA

## Tracking Over Time

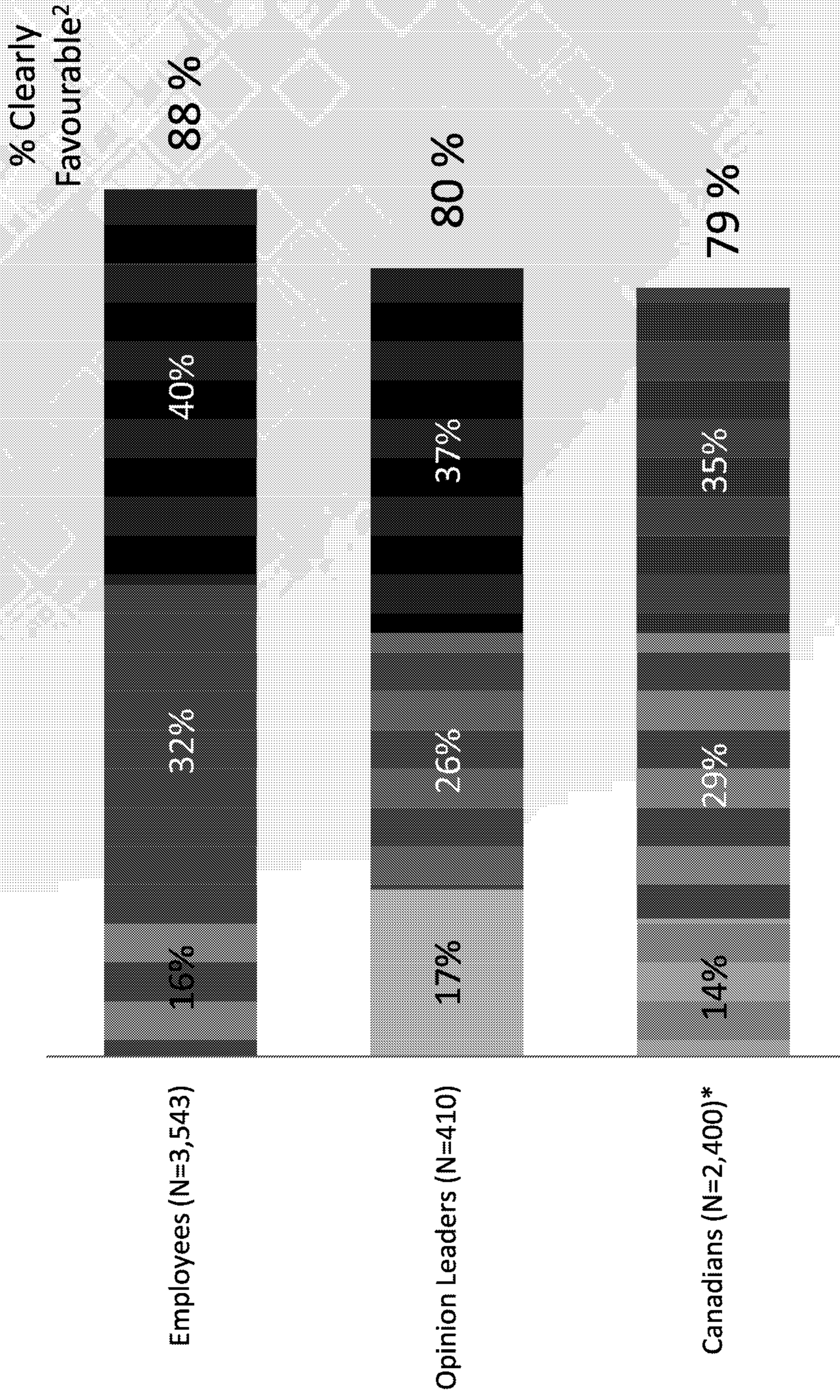


Note: In 2012, the numeric rating scale was changed from 7 to 10 points. Caution should be exercised when interpreting changes over time.

Figures from the Mission Metrics survey have been added to the slide (in green).

# OVERALL IMPRESSION OF CBC/RADIO-CANADA

Q. All things considered, what is your overall impression of the CBC?<sup>1</sup>



<sup>1</sup> The question for the Canadians sample was : Now, I'd like you to think about the type of organization the CBC is and the way it goes about providing public broadcasting services. Please tell me your general impression of the CBC overall.

<sup>2</sup> % Clearly Favourable refers to the percentage of respondents who gave a score of 7, 8, 9 or 10 on a 10 points scale.

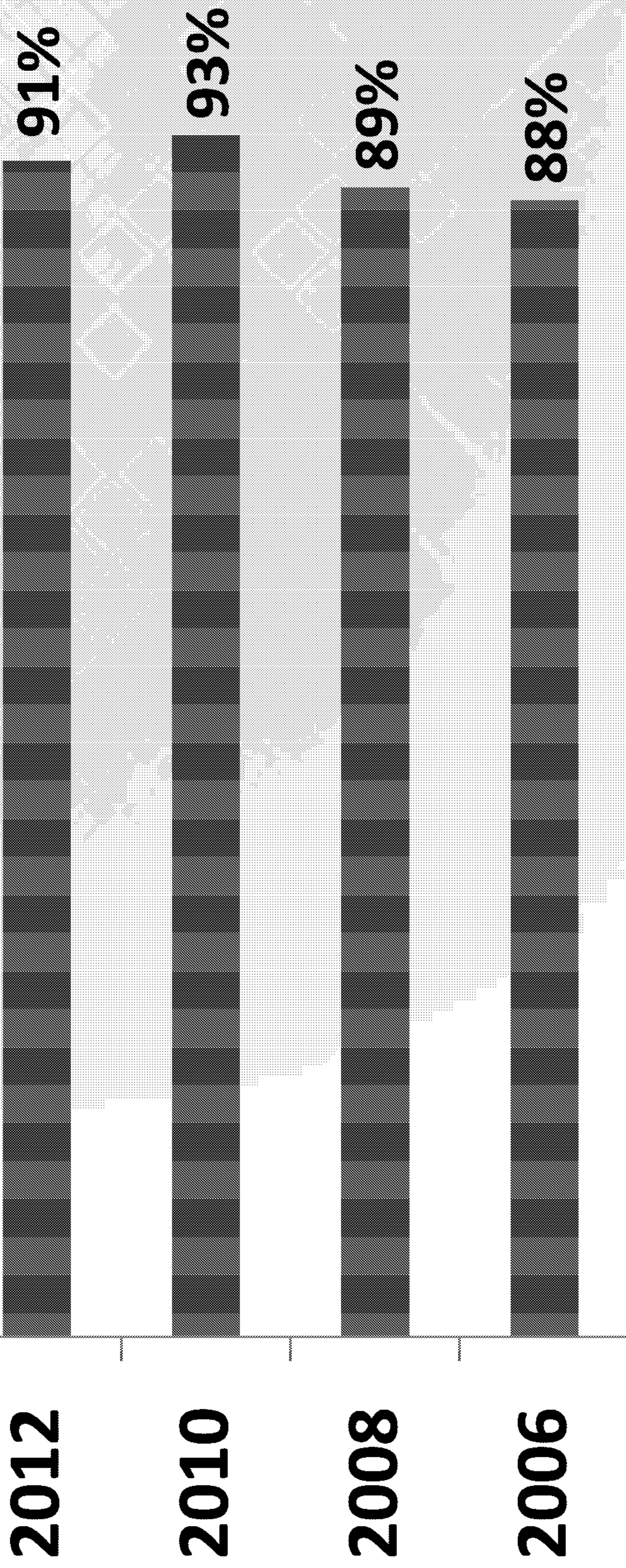
\*Source : TNS Canadian Facts (1,200 Anglophones and 1,200 Francophones ). Survey conducted in Spring 2011.



# IMPORTANCE OF A NATIONAL PUBLIC BROADCASTER

## Tracking Over Time

% rating it important



Note: In 2012, the numeric rating scale was changed from 7 to 10 points.  
Caution should be exercised when interpreting changes over time.



# IMPORTANCE ATTRIBUTED TO CBC/RADIO-CANADA ON PERSONAL LEVEL

## Tracking Over Time

% rating it important



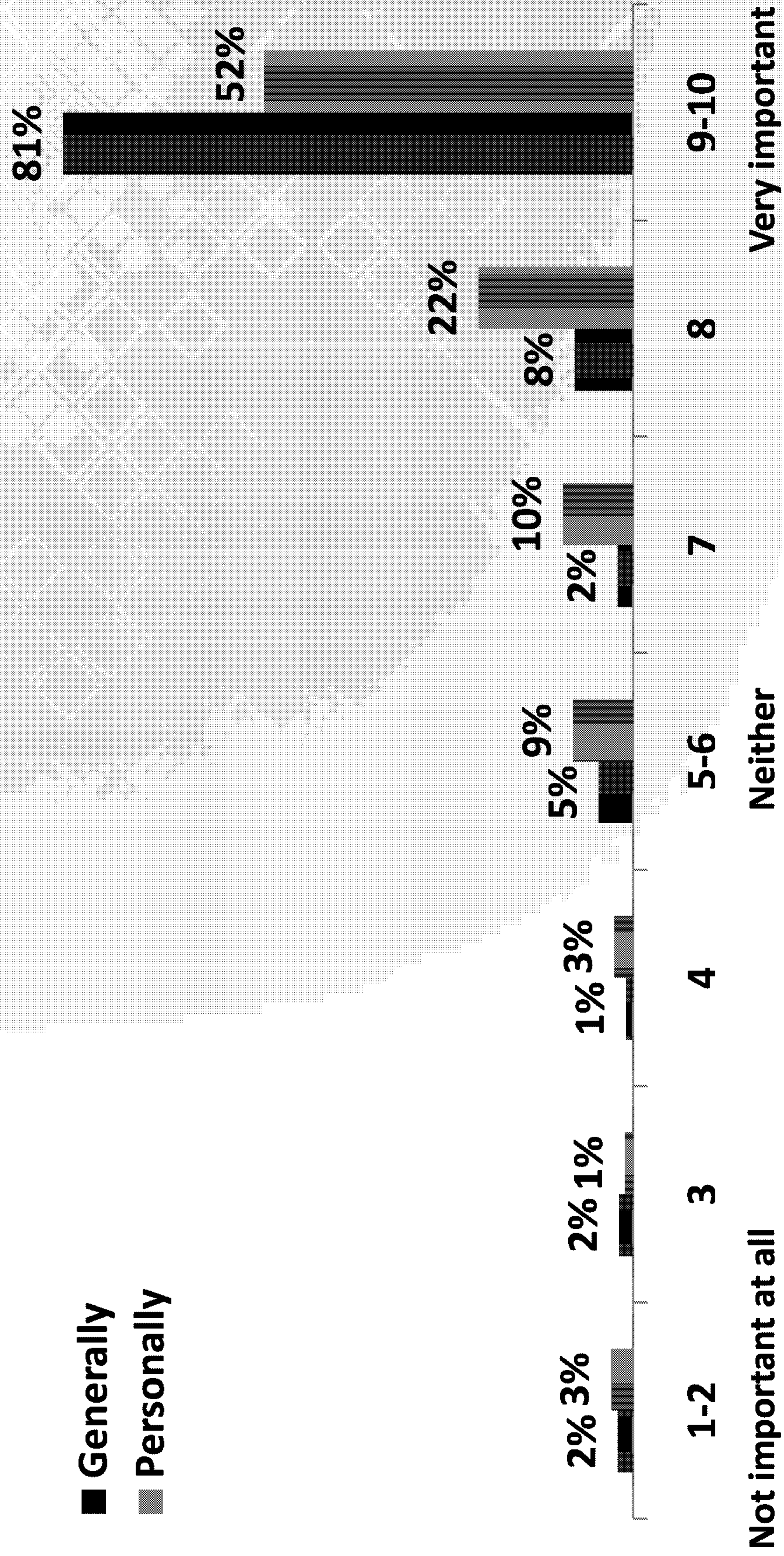
Note: In 2012, the numeric rating scale was changed from 7 to 10 points.  
Caution should be exercised when interpreting changes over time.



# IMPORTANCE OF CBC/RADIO-CANADA

Q2. In your opinion, how important is it for Canada to have a national public broadcaster like the CBC?

Q3. And how important would you say the CBC is to you personally?

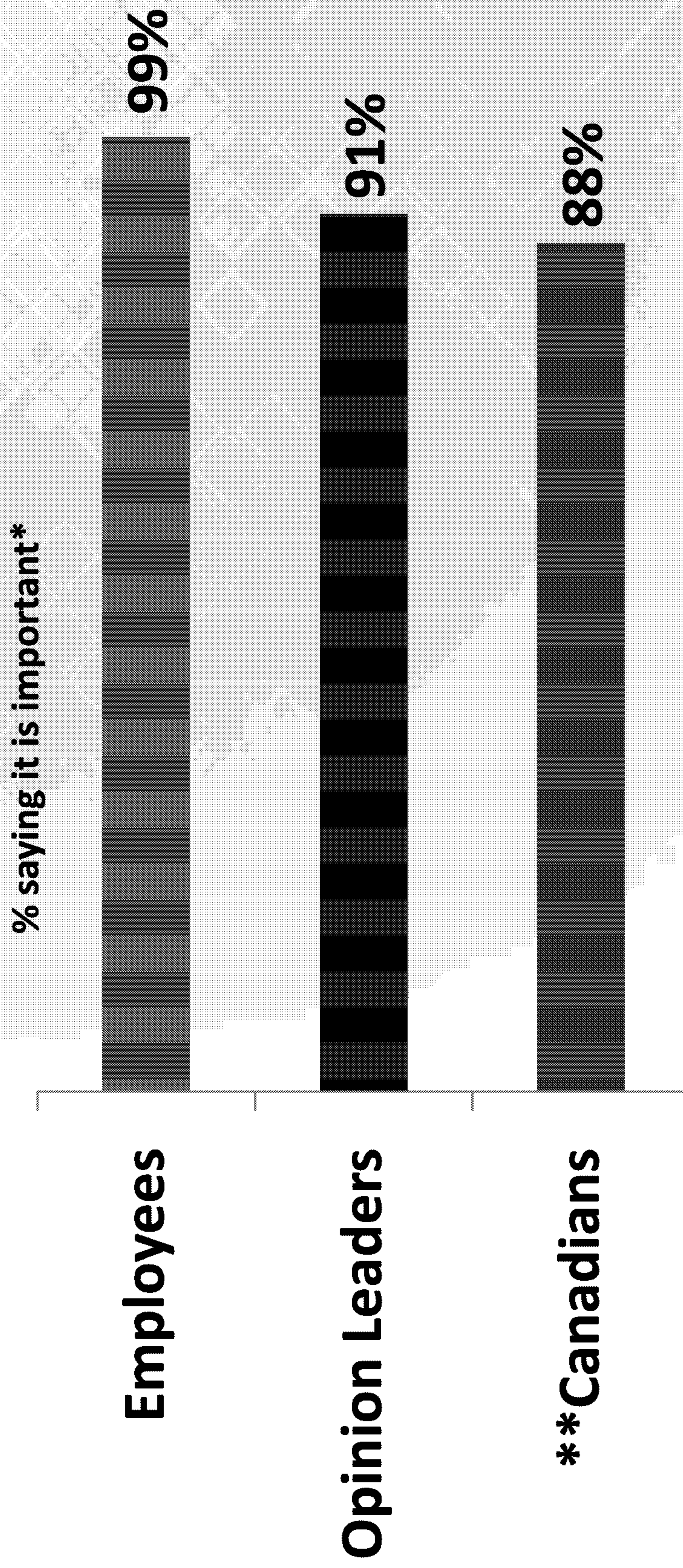


Figures from the Mission Metrics survey have been added to the slide (in green).

## IMPORTANCE OF CBC/RADIO-CANADA



Q. In your opinion, how important is it for Canada to have a national public broadcaster like the CBC? <sup>1</sup>



<sup>1</sup>The question for the Canadians sample was the same : How important would you say it is for Canada to have a national public broadcaster like CBC.

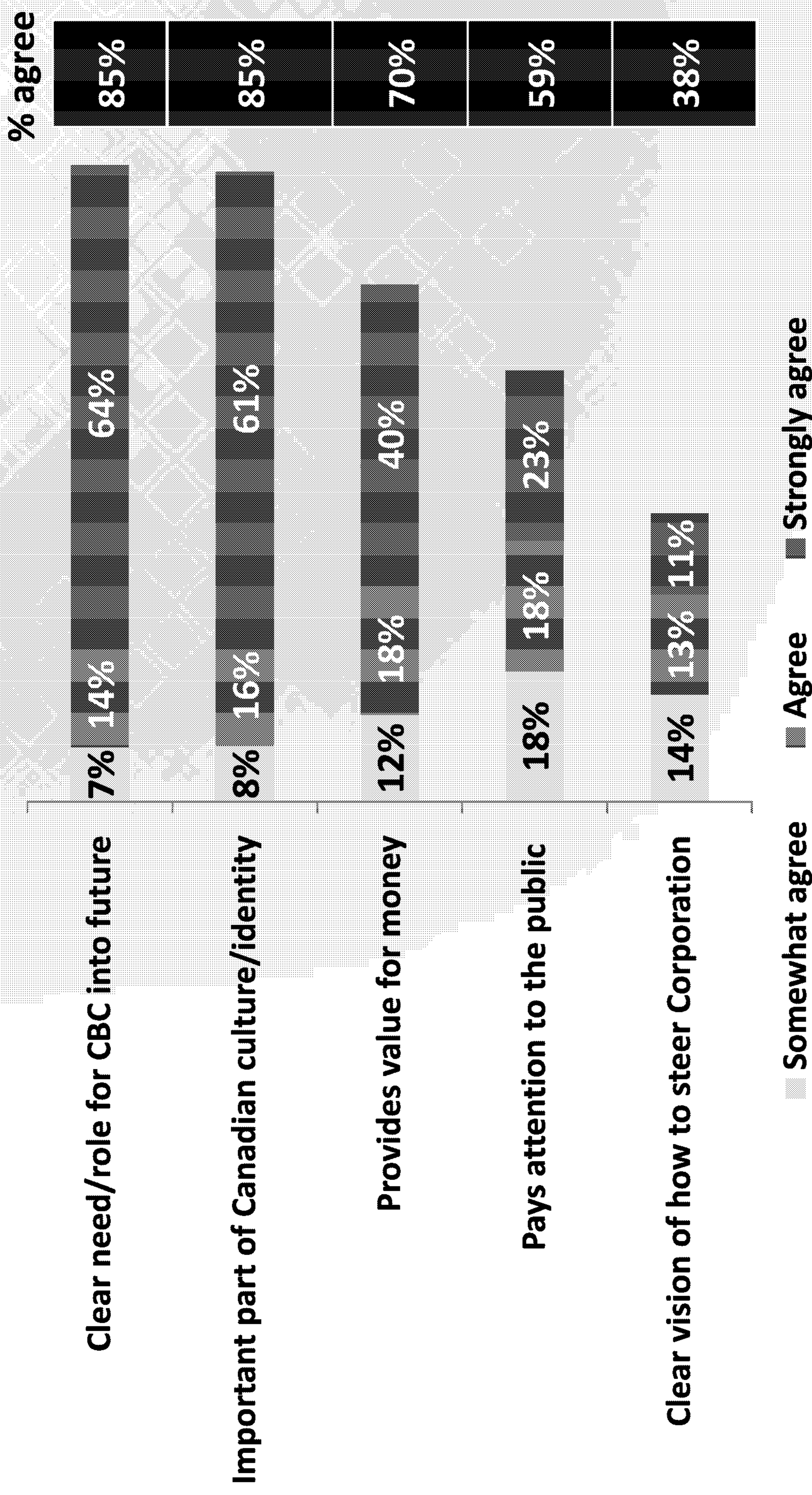
\* Scores of 7-10 on a 10-point scale

\*\*Source : TNS Canadian Facts (1,200 Anglophones and 1,200 Francophones ). Survey conducted in November 2011.



# GENERAL PERCEPTIONS OF CBC/RADIO-CANADA

Q4. To what extent do you agree or disagree with the following statements about CBC?



Base: N=410; all opinion leaders  
Don't know/No response: 1-18%



Figures from the Mission Metrics survey have been added to the slide (in green).



# GENERAL PERCEPTIONS OF CBC/RADIO-CANADA

% reporting positive perceptions\*

Statements about CBC/Radio-Canada	Employees (N=3,543) %	Opinion Leaders (N=410) %	** Canadians (N=2,400) %
<b>Important to Canadian culture/identity</b>	93	85	---
<b>Clear need/role for CBC into future</b>	92	85	82
<b>Provides values for money<sup>1</sup></b>	88	70	78
<b>Pays attention to what public thinks</b>	77	59	---
<b>Has clear vision for future</b>	69	38	---

<sup>1</sup> Caution should be used when comparing the results of the "Value for money" statement since the two surveys used different wording. Stakeholder Survey : CBC provides a value for money to Canadian taxpayers. TNS Canadian Facts questionnaire : The CBC receives most of its money from the Federal Government. It costs the average Canadian approximately 65 CENTS A WEEK OR \$34 A YEAR for the CBC to offer radio, television and Internet services in both English and in French. On a scale from 1 to 10, where 1 means 'Very Poor Value' and 10 means 'Very Good Value' please tell me whether you think this represents good or poor value for the money.

\* Scores of 7-10 on a 10-point scale

\*\* Source : TNS Canadian Facts (1,200 Anglophones and 1,200 Francophones ). Survey conducted in November 2011.



# GENERAL PERCEPTIONS OF CBC/RADIO-CANADA

## Tracking Over Time

% reporting positive perceptions

Statements about CBC/Radio-Canada	2012 %	2010 %	2008 %	2006 %
<b>Important to Canadian culture/identity</b>	85	85	78	79
<b>Provides value for money</b>	70	66	65	58
<b>Pays attention to what public thinks</b>	59	54	50	46
<b>Has clear vision for future</b>	38	32	28	20

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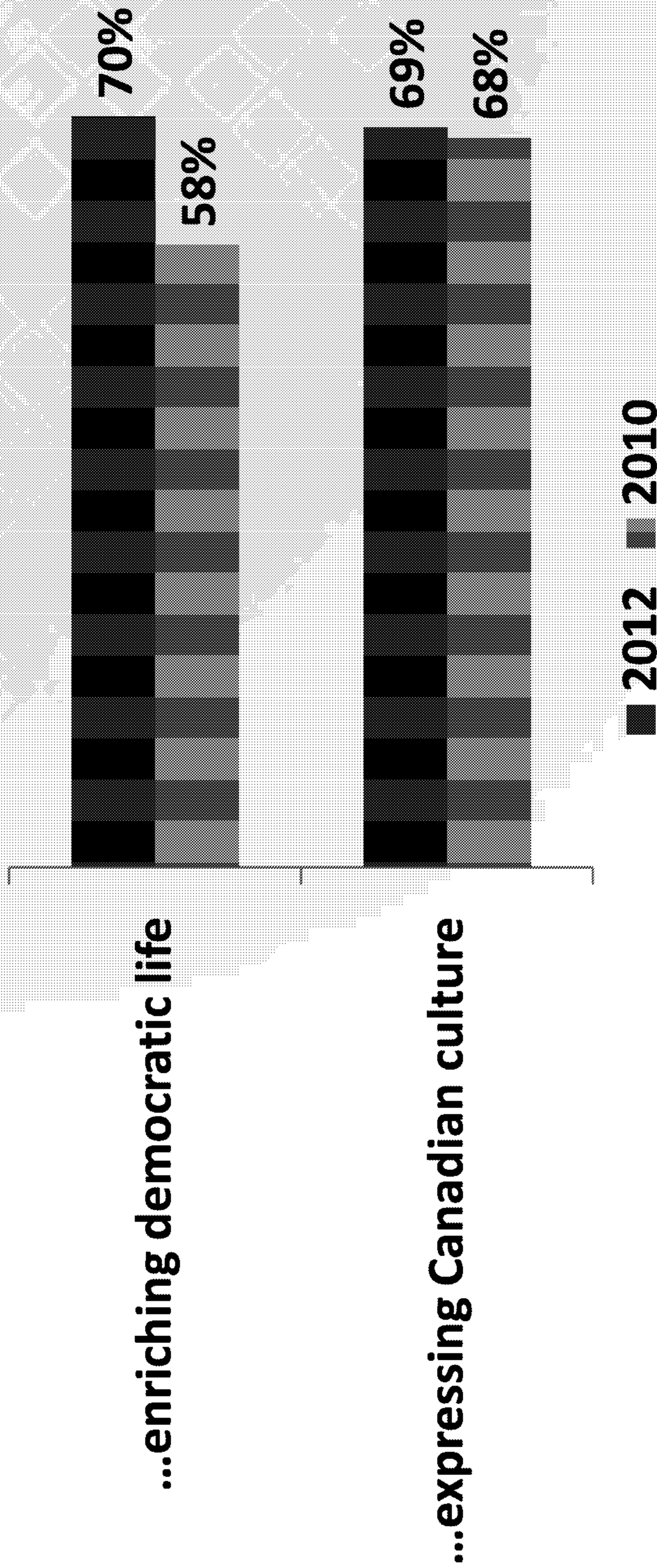


# RATINGS OF CBC/RADIO-CANADA'S CURRENT PERFORMANCE VIS-À-VIS STRATEGIC DIRECTION

## Tracking Over Time

How would you rate the CBC's current performance when it comes to...

% reporting positive perceptions



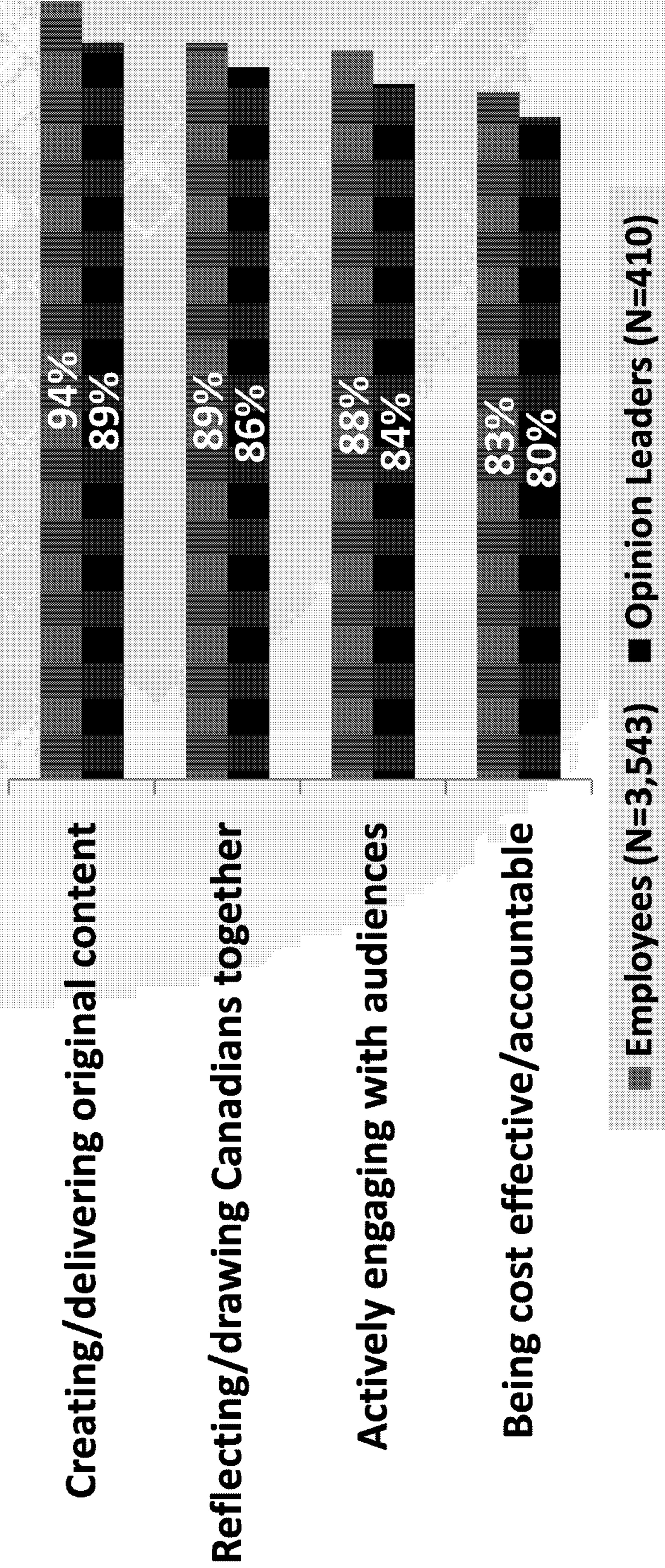
Note: In 2012, the numeric rating scale was changed from 7 to 10 points.  
Caution should be exercised when interpreting changes over time.



# PERCEIVED IMPORTANCE OF GUIDING PRINCIPLES FOR CBC/RADIO-CANADA

Q. The strategic plan identifies a number of guiding principles. In your opinion, how important are each of these as guiding principles for the CBC?

% saying it is important

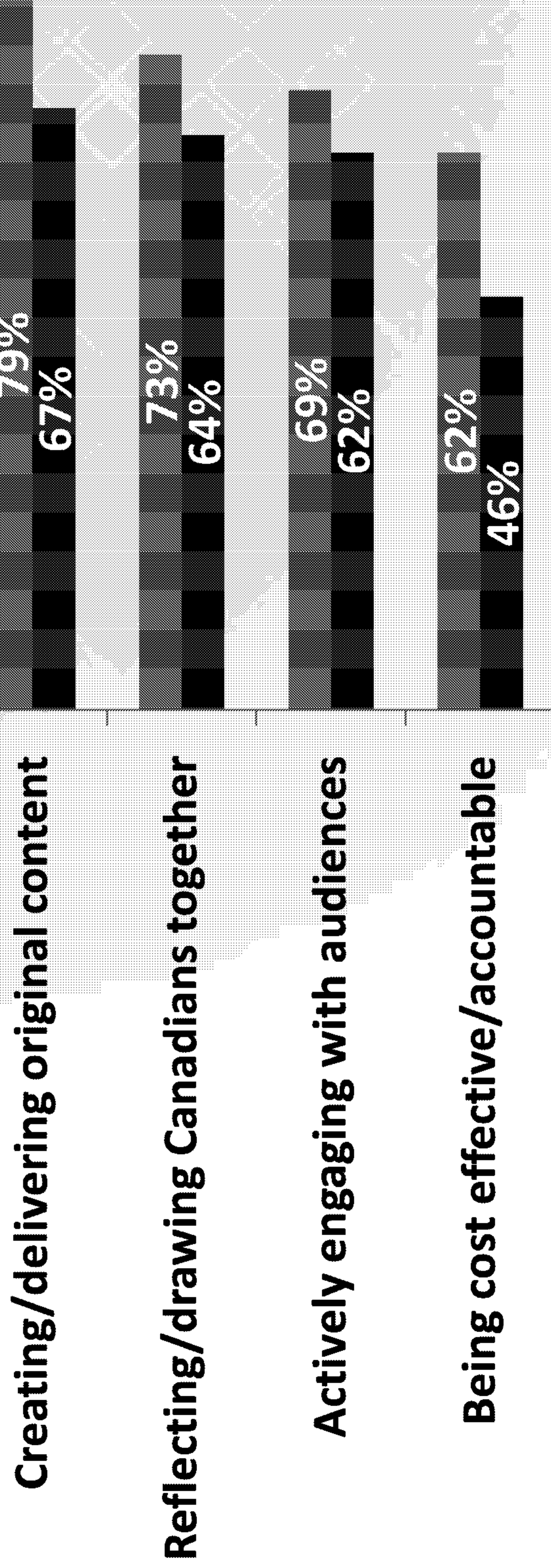




# RATINGS OF CBC/RADIO-CANADA'S PERFORMANCE IN RELATION TO GUIDING PRINCIPLES

Q. And how would you rate CBC/Radio-Canada's current performance in relation to the strategic plan's guiding principles?

% rating performance positively



■ Employees (N=3,543) ■ Opinion Leaders (N=410)



# CBC/RADIO-CANADA'S GUIDING PRINCIPLES: IMPORTANCE VS. PERFORMANCE

Positive scores on 10-point scale

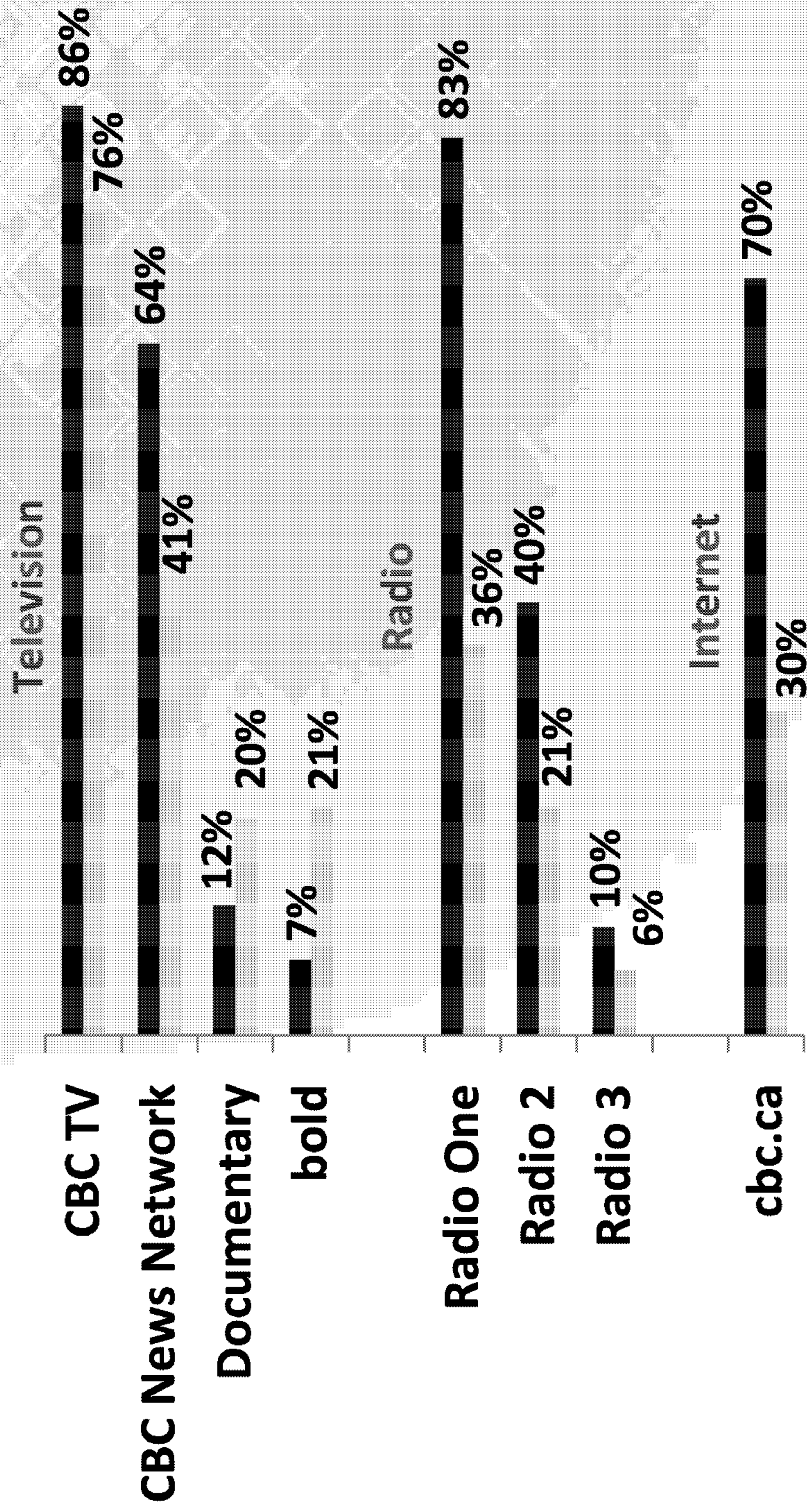
Guiding Principles	Importance (scores of 7-10) %	Performance (scores of 7-10) %	Gap %
Creating/delivering original content	89	67	-22
Reflecting/drawing Canadians together	86	64	-22
Actively engaging with audiences	84	62	-22
Being cost effective/accountable	80	46	-34



# USE OF CBC SERVICES

Q8. Which of the following CBC services do you personally use in a typical month?

Generally speaking, Opinion Leaders are more likely to use CBC's services. Although, we note that bold and documentary tend to record higher use rates among the overall Anglophone population.



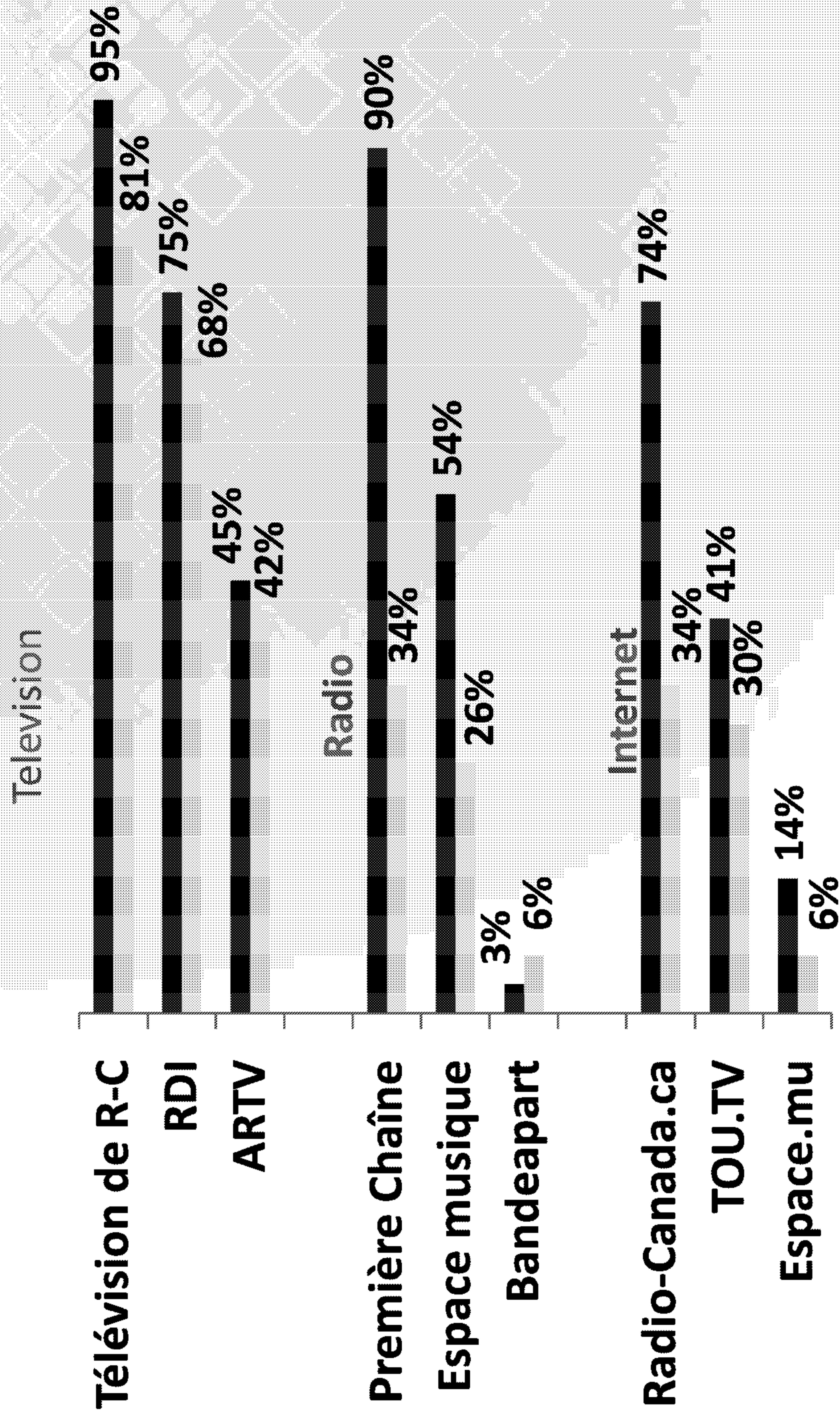
\* Source: TNS Canadian Facts (1,200 Anglophones). Surveys conducted in November 2011.



# USE OF RADIO-CANADA SERVICES

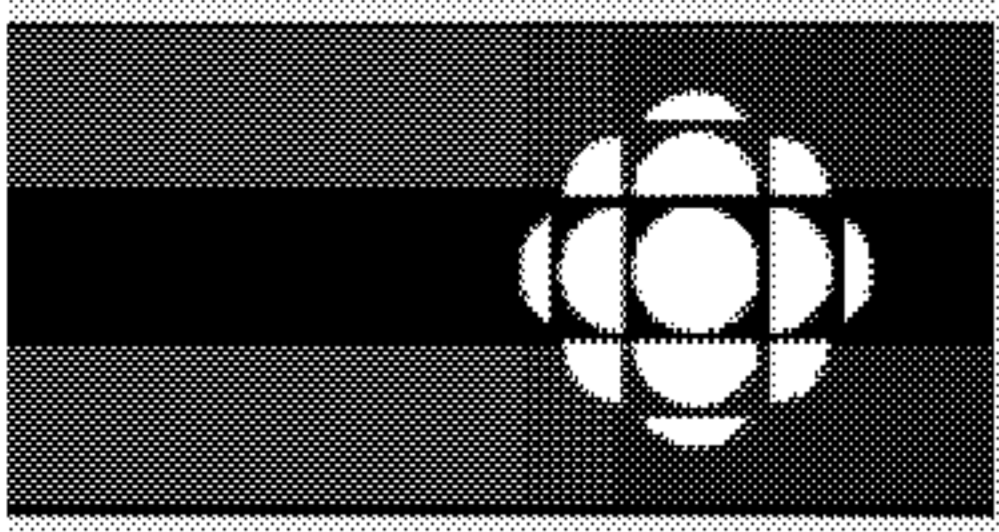
Q8. Which of the following Radio-Canada services do you personally use in a typical month?

Generally speaking, Opinion Leaders are more likely to use Radio-Canada's services. Although, we note that bande à part tends to record a higher use rate among the overall Francophone population.



\* Source: TNS Canadian Facts (1,200 Francophones). Surveys conducted in November 2011.





# MISSION METRICS: CBC AND RADIO-CANADA SERVICES

% reporting positive ratings on a 10-point scale (i.e., scores of 7-10)

Metrics	CBC Services			R-C Services		
	Television (n=286) %	Radio (n=274) %	Internet (n=216) %	Television (n=97) %	Radio (n=96) %	Internet (n=84) %
... is of high quality	70	86	82	88	88	66
... you can't find on other channels.	66	86	60	77	88	51
... tells me what is happening in other regions of the country.	77	86	83	63	69	63
... tells me what is happening in my community.	56	78	63	60	68	55
... reflects the multicultural diversity of Canada.	65	80	63	59	63	39
... reflects my cultural background.	60	70	60	62	77	52

\*Exercise caution when interpreting results due to the small sample sizes.

Results include Don't know/No response

Base: English-speaking opinion leaders who use at least 1 service in the categories: TV, radio, Internet

French-speaking opinion leaders who use at least 1 service in the categories: TV, radio, Internet

French-speaking opinion leaders who use at least 1 service in the categories: TV, radio, Internet



# MISSION METRICS: CBC SERVICES

% reporting positive ratings on a 10-point scale (i.e., scores of 7-10)

Overall, Canadians are more likely to have a positive perception towards CBC's Television and Radio services than Opinion Leaders.

Metrics	CBC Services					
	Television		Radio		Internet	
	* Leaders (n=286) %	** Canadians (n=989) %	Leaders (n=274) %	Canadians (n=529) %	Leaders (n=216) %	Canadians (n=367) %
...is of high quality	70	81	86	87	82	89
...you can't find on other channels.	66	69	86	81	60	59
...tells me what is happening in other regions of the country.	77	82	86	86	83	88
...tells me what is happening in my community.	56	54	78	62	63	55
...reflects the multicultural diversity of Canada.	65	76	80	79	63	78
...reflects my cultural background.	60	59	70	66	60	66

\*Leaders : Exercise caution when interpreting results due to the small sample sizes.  
 Results include Don't know/No response Base: English-speaking opinion leaders who use at least 1 service in the categories: TV, radio, Internet  
 Statistical differences are indicated as follows: O = statistically significant negative difference O = statistically significant positive difference 27

\*\* Canadians : Results include Don't know/No response  
 Source: TNS Canadian Facts . Surveys conducted in November 2011. Base : English-speaking respondents who used at least 1 service in the categories : TV, Radio, Internet

# MISSION METRICS: RADIO-CANADA SERVICES

% reporting positive ratings on a 10-point scale (i.e., scores of 7-10)

Overall, Canadians are more likely to have a positive perception towards Radio-Canada's Television and Radio services than Opinion Leaders.

Metrics	Radio-Canada Services					
	Television		Radio		Internet	
	*Leaders (n=97) %	**Canadians (n=1074) %	Leaders (n=96) %	Canadians (n=538) %	Leaders (n=84) %	Canadians (n=525) %
...is of high quality	88	93	88	87	66	85
...you can't find on other channels.	77	85	88	81	51	76
...tells me what is happening in other regions of the country.	63	89	69	71	63	70
...tells me what is happening in my community.	60	73	68	66	55	60
...reflects the multicultural diversity of Canada.	59	81	63	74	39	69
...reflects my cultural background.	62	78	77	76	52	74

\*Leaders : Exercise caution when interpreting results due to the small sample sizes. Results include Don't know/No response Base: French-speaking opinion leaders who use at least 1 service in the categories: TV, radio, Internet

Statistical differences are indicated as follows: O = statistically significant negative difference O = statistically significant positive difference

\*\* Canadians : Results include Don't know/No response Source: TNS Canadian Facts . Surveys conducted in November 2011. Base : English-speaking respondents who used at least 1 service in the categories : TV, Radio, Internet

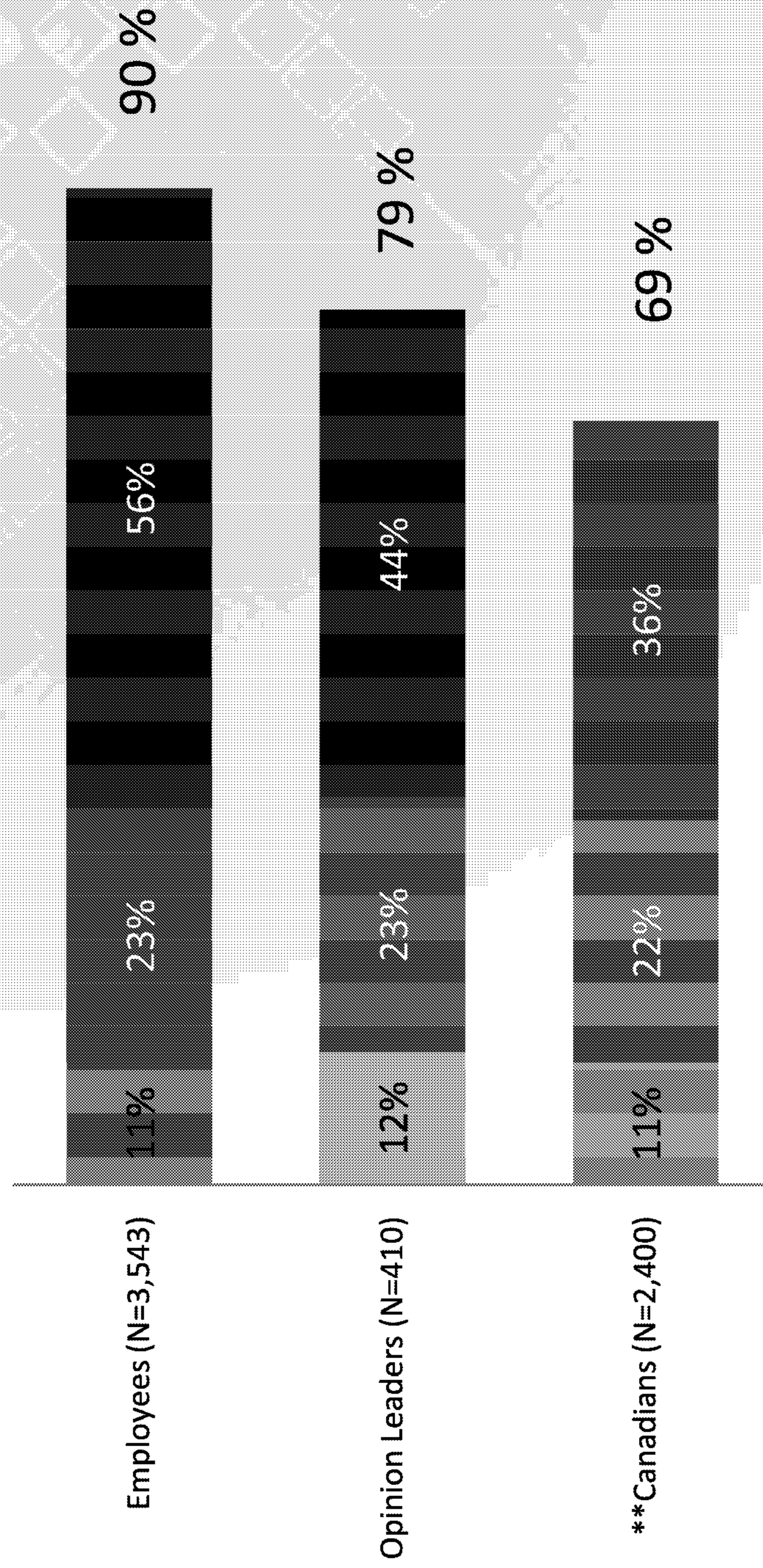
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## CBC/RADIO-CANADA'S USE OF INNOVATIVE PLATFORMS

**Q. Now, thinking about the CBC's services overall, please rate your level of agreement with the following statement :**

CBC ensures that its radio and TV programs and services are available on the latest innovative platforms, such as the Internet, mobile devices, Video-On-Demand and satellite radio.

**% Clearly Agree**

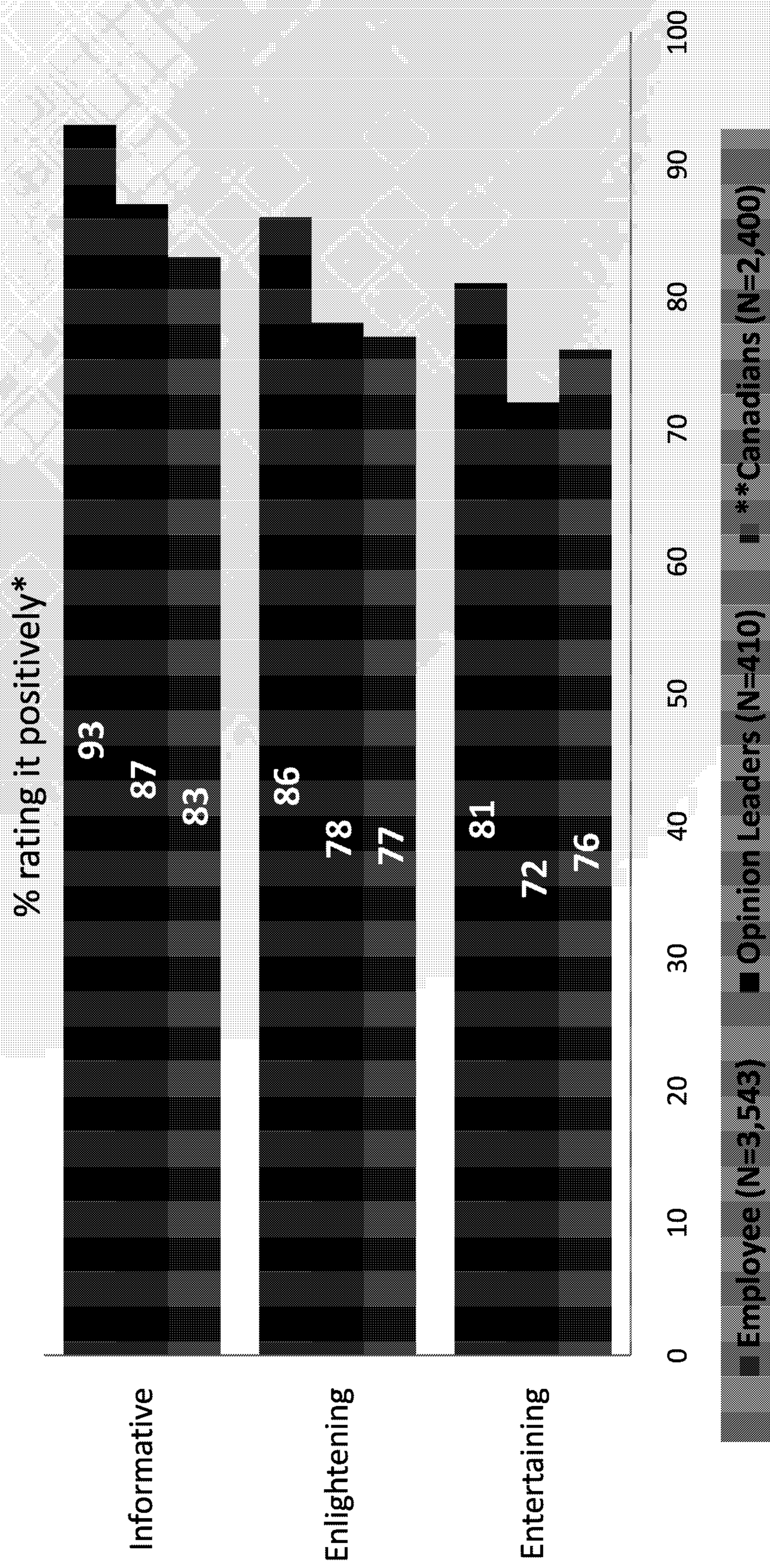


\*\*Source : TNS Canadian Facts (1,200 Anglophones and 1,200 Francophones ). Survey conducted in November 2011.  
% Clearly Agree refers to the percentage of respondents who gave a score of 7, 8, 9 or 10 on a 10 points scale.

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## PERCEPTIONS OF CBC/RADIO-CANADA'S SERVICES VIS-À-VIS MANDATE

Q. The CBC's mandate is to "inform, enlighten and entertain" Canadians by providing a wide range of programs. To what extent do you agree or disagree that, overall, CBC's services offer content that is...?



\* Scores of 7-10 on a 10-point scale

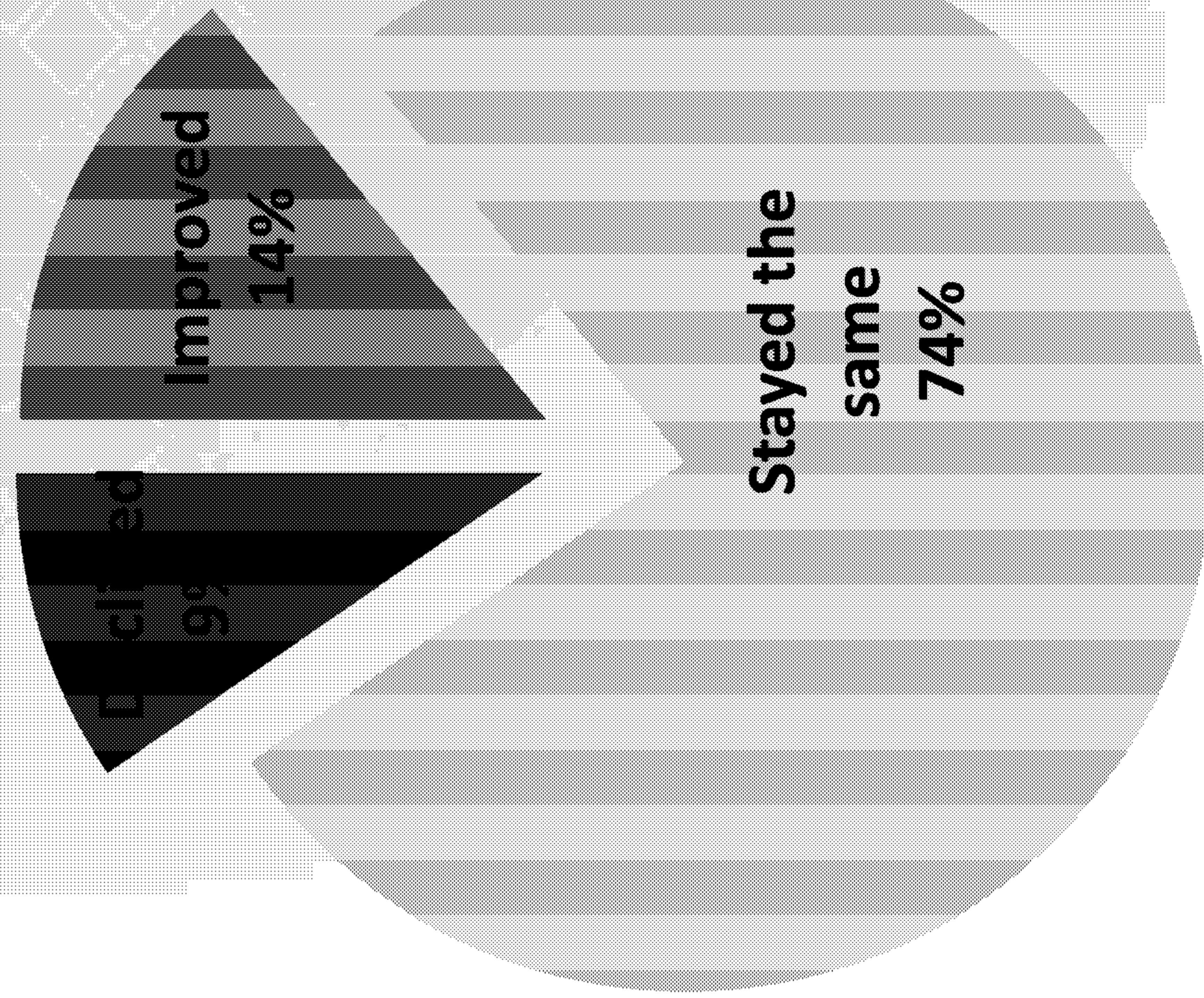
\*\* Source : TNS Canadian Facts

(1,200 Anglophones and 1,200 Francophones ). Survey conducted in November 2011.



# PERCEPTIONS OF CBC/RADIO-CANADA AS CANADA'S NATIONAL PUBLIC BROADCASTER

Q13: Has your perception of the CBC as Canada's national public broadcaster improved, stayed the same or declined?



Base: N=410; all opinion leaders  
Don't know/No response: 3%



## PERCEIVED IMPORTANCE OF A NATIONAL PUBLIC BROADCASTER IN LIGHT OF CHANGING BROADCASTING LANDSCAPE

The broadcasting landscape has changed significantly over the last decade, with media convergence, the proliferation of new technologies, the availability of more content choices than ever before, and more ways of accessing content.

**Q15: Considering these changes, in your view is it now more important or less important that Canada has a national public broadcaster?**

