

**Board of Directors**

March 20-21, 2012

**Subject matter****CBC/Radio-Canada 2012 Opinion Leader Survey****Background**

Enclosed, as a follow-up to the January meeting – during which an overview of the results of the 2012 Opinion Leader survey was presented – is a copy of the summary report of the survey results, which was mailed to survey respondents in late February and posted on the corporate website at [http://cbc.radio-canada.ca/submissions/pdf/STK\\_Survey\\_EN.pdf](http://cbc.radio-canada.ca/submissions/pdf/STK_Survey_EN.pdf).

**Information on the matter****For decision****For information****Prepared by**

Name: Bill Chambers  
Date: March 9, 2011

**Management recommendation**

n/a

**Last discussed at the Board**

Date: January 2012  
Decision made: n/a

**Next steps**

Results will help to shape our approach and plans for stakeholder communications for the coming year.

# CBC/Radio-Canada 2012 Opinion Leader Survey

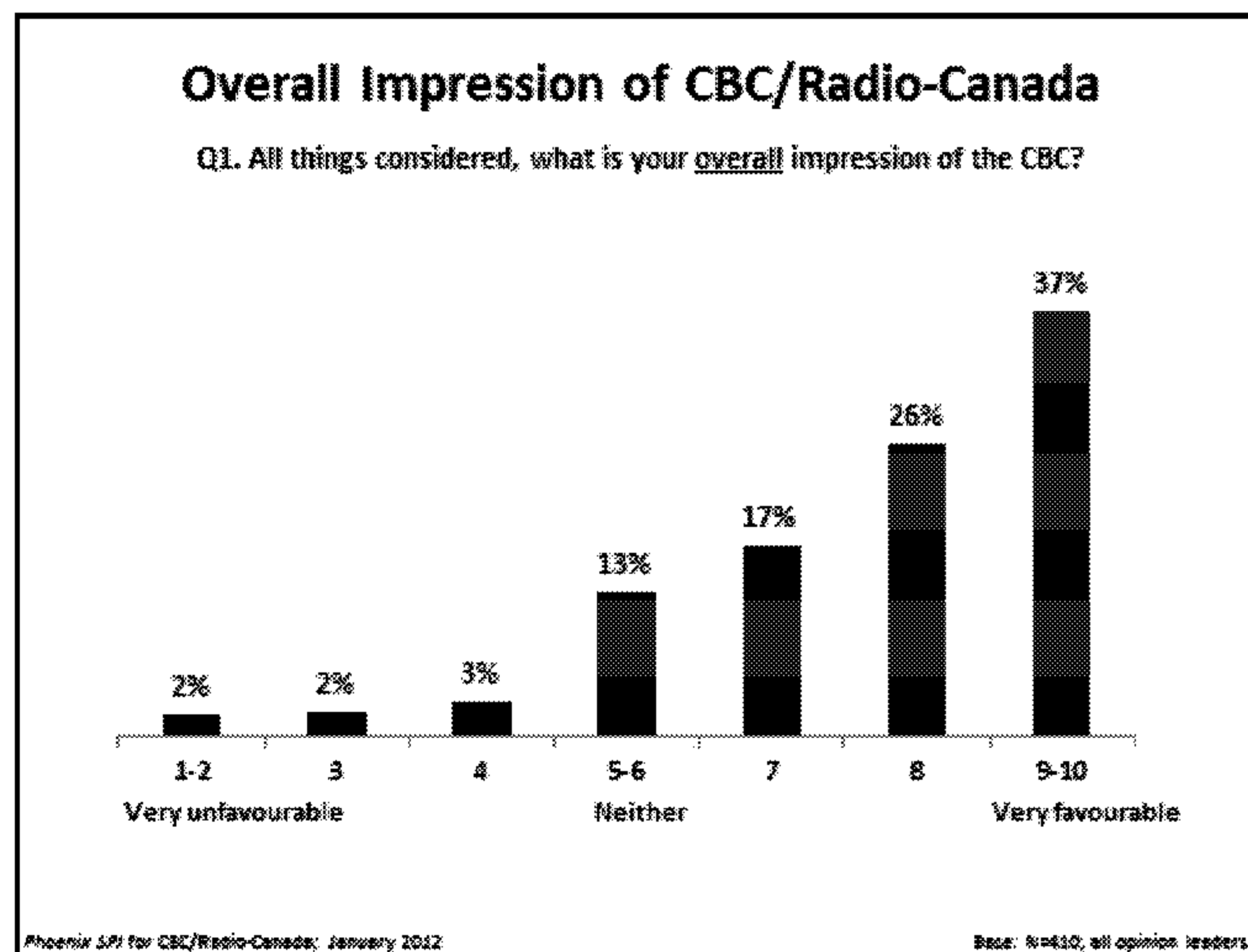
## Research Highlights

This summary report presents selected findings for an online survey of opinion leaders undertaken by Phoenix SPI on behalf of the Canadian Broadcasting Corporation (CBC)/Radio-Canada. The objective of the research was to explore opinion leader perceptions of the Corporation in key areas, and to track changes over time. An online survey was conducted with individuals drawn from a range of public and private organizations in Canada, including government, media, associations, public affairs organizations, arts, sports and cultural organizations, businesses, and post-secondary institutions. In total, 410 opinion leaders completed the survey, representing a response rate of 24%. Based on a sample of this size, the overall results of the survey can be considered accurate to within  $\pm 5\%$ , 19 times out of 20. The survey was available online from November 30th to December 23rd, 2011.

### OVERALL IMPRESSIONS OF CBC/RADIO-CANADA

#### Large Majority Have Positive Overall Impressions

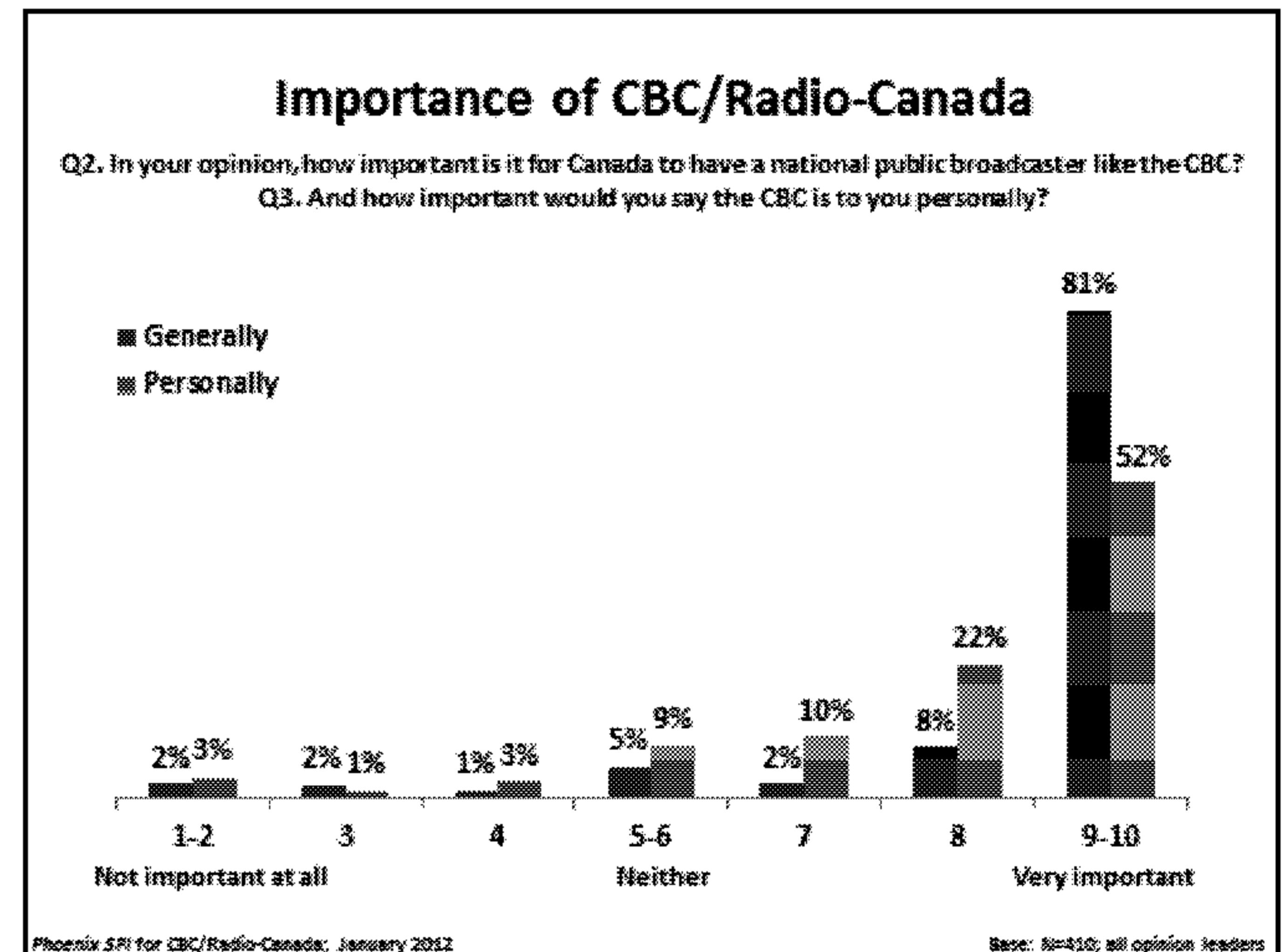
Consistent with past years, opinion leaders tend to have very positive general impressions of CBC/ Radio-Canada. Exactly four in five (80%) have favourable overall impressions of the Corporation, with well over half (63%) saying they have a strongly favourable impression.



#### Widespread Agreement that CBC is Important

Overall positive impressions of CBC/Radio-Canada are underscored by the fact that opinion leaders continue to feel that it is not only important that Canada has a national public broadcaster, but that CBC/Radio-Canada is important to them personally.

Nine in ten (91%) respondents think it is important for Canada to have a national public broadcaster like CBC/Radio-Canada, with 81% thinking this is very important. In addition, the large majority of opinion leaders (84%) feel the broadcaster is important to them personally. Relatively few attribute a lack of importance to either of these.



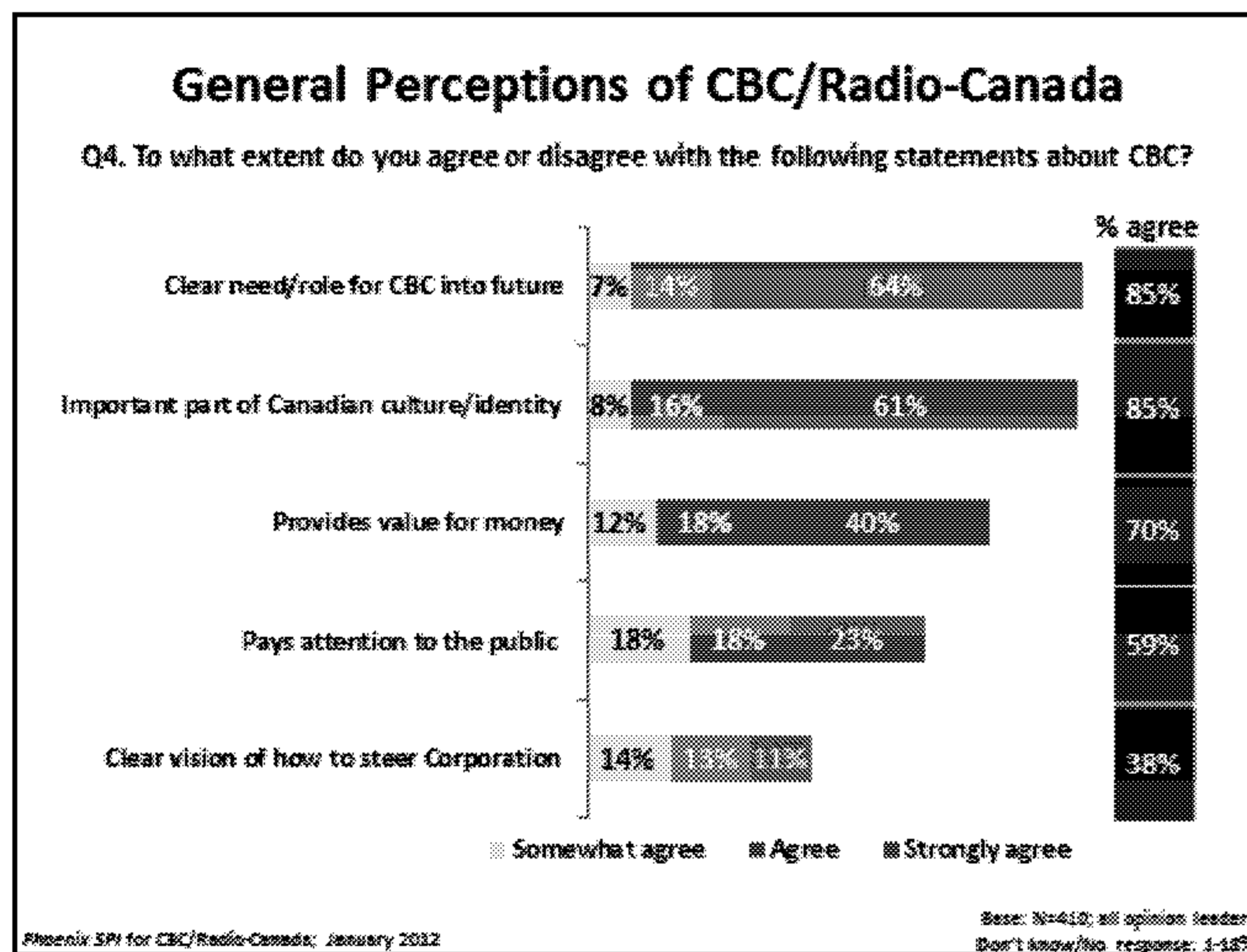
## General Perceptions Tend to be Positive

Opinion leaders were asked to identify their level of agreement with the following statements about CBC/Radio-Canada as a whole:

- *There is a clear need and role for CBC into the future.*
- *CBC is an important part of Canadian culture and identity.*
- *CBC provides value for money to Canadian taxpayers.*
- *CBC has a clear vision of how to steer the Corporation into the future.*
- *CBC pays attention to what the public thinks about its programs and services.*

General perceptions tend to be positive. Opinion leaders were most likely to agree that there is a clear need and role for CBC/Radio-Canada into the future and that CBC/Radio-Canada is an important part of Canadian culture and identity. In total, 85% agreed with each of these statements, with 64% and 61%, respectively, agreeing *strongly* that this is the case.

Following this, seven in ten feel that CBC/Radio-Canada provides value for money to Canadian taxpayers. Just over half (59%) think that CBC/Radio-Canada pays attention to what the public thinks about its programs and services.



Views regarding CBC/Radio-Canada's vision for the future were more mixed. While 38% agreed that CBC/Radio-Canada has a clear vision of how to steer the Corporation, one in five (21%) did not feel that this is the case, offering negative scores on the scale.

Perceptions of CBC/Radio-Canada have remained the same or become more positive over time. The most notable

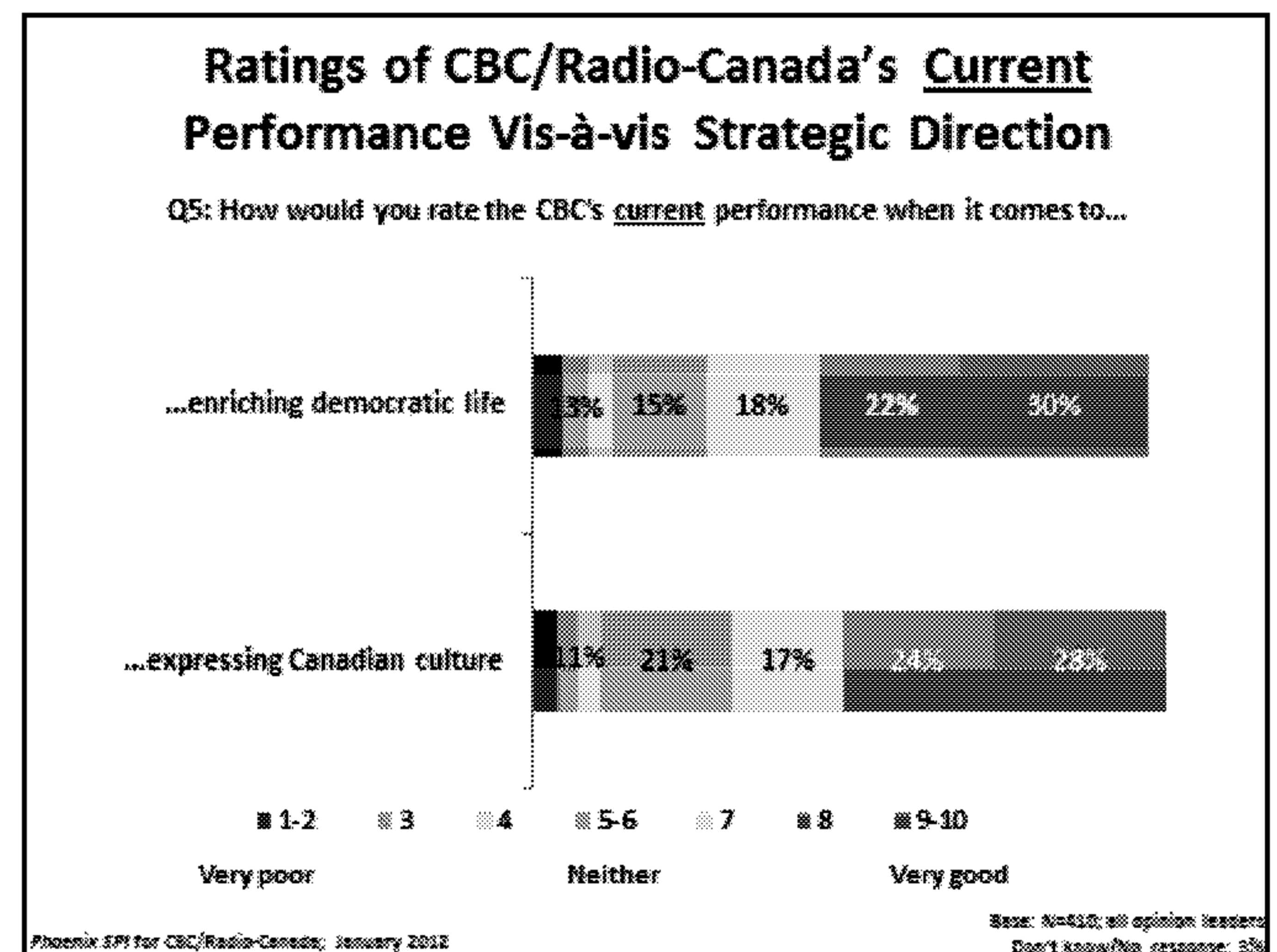
change over time is in relation to CBC/Radio-Canada's vision for the future. In 2012, 38% of opinion leaders agreed that the Corporation has a clear vision compared to 32% in 2010, 28% in 2008 and 20% in 2006.

## PERFORMANCE ASSESSMENTS: STRATEGIC PLAN

Opinion leaders were asked about CBC/Radio-Canada's performance in relation to the Corporation's five-year strategic plan, 2015: *Everyone, Every way*, launched in February 2011.

### Modest Performance Ratings Vis-à-vis Strategic Direction Components

Virtually identical proportions feel that CBC/Radio-Canada is currently doing a moderately to very good job in relation to its twin objectives: enriching democratic life (70%) and expressing Canadian culture (69%).



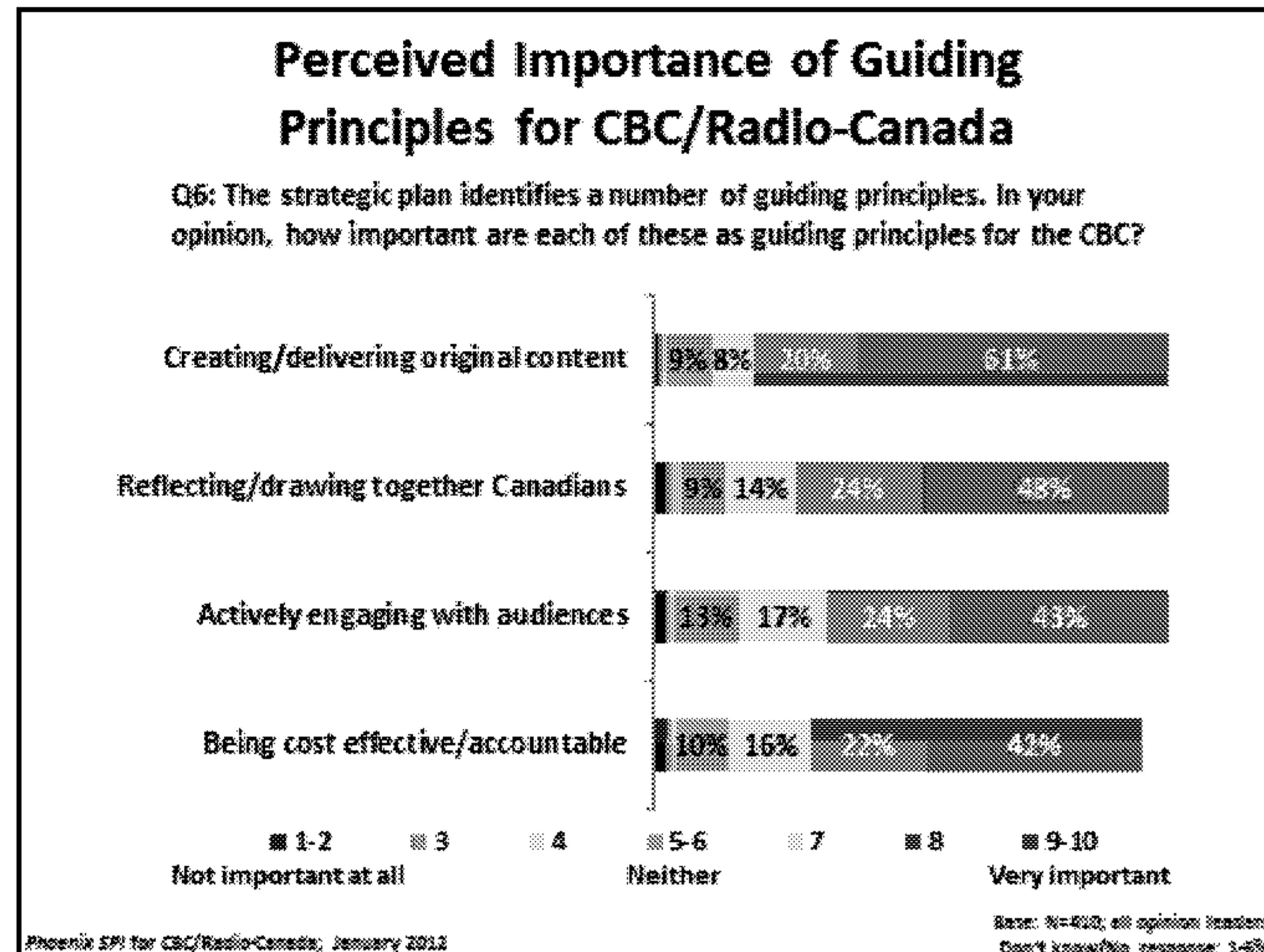
### Guiding Principles are Seen to be Important

Opinion leaders were asked to rate the importance of the four guiding principles identified in CBC/Radio-Canada's strategic plan. The principles that were assessed included:

- *Creating and delivering original, innovative, quality Canadian content.*
- *Reflecting and drawing together Canadians.*
- *Actively engaging with audiences.*
- *Being cost-effective and accountable.*

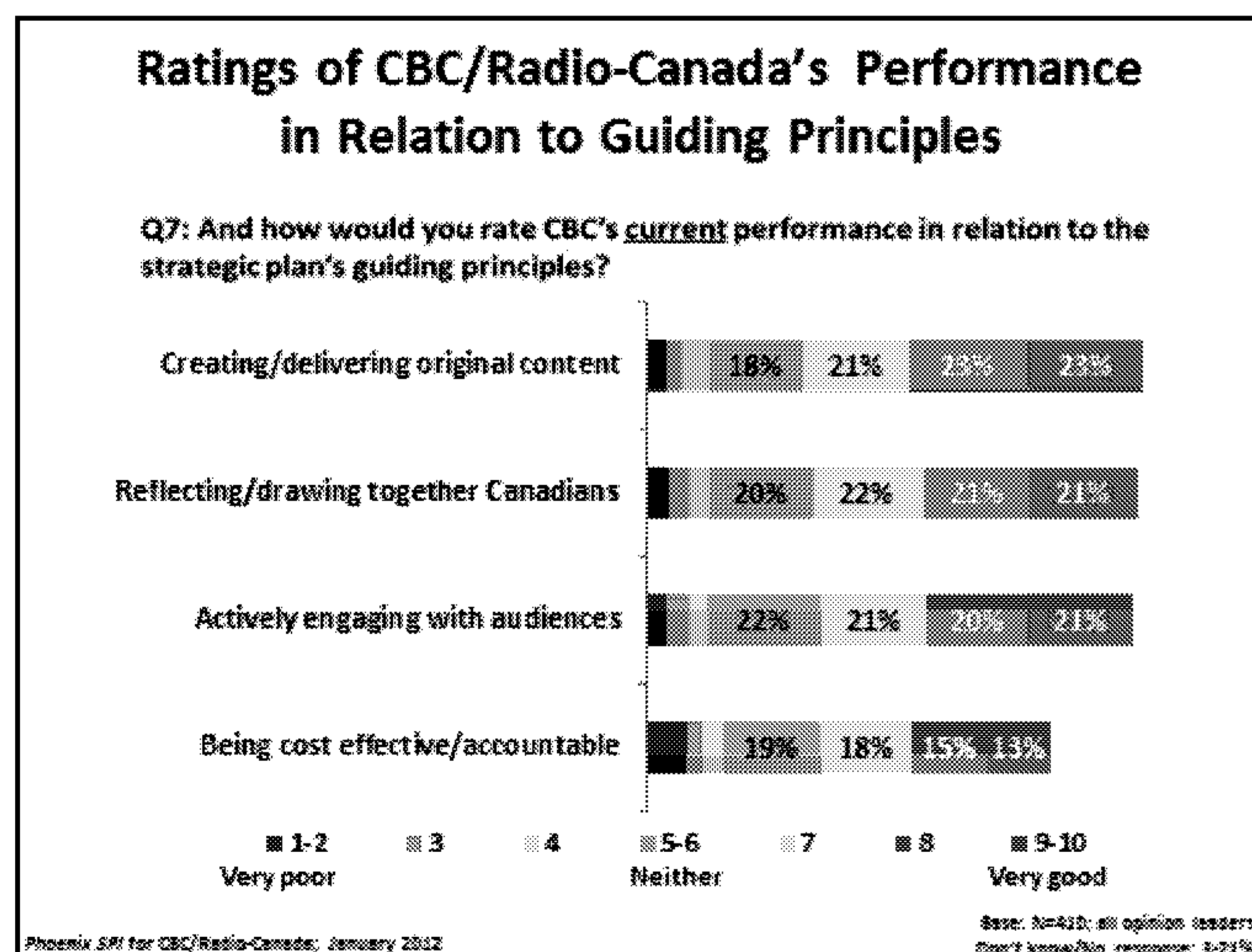
Strong majorities view as important each of these four principles, although one stood out because of the intensity of the importance attributed to it by opinion leaders.

Almost nine in ten (89%) said it is important for CBC/Radio-Canada to create and deliver original, innovative, quality Canadian content, with 61% indicating that this is *very* important. Slightly fewer think it is important for CBC/Radio-Canada to reflect and draw together Canadians (86%) and to actively engage with audiences (84%). Exactly four in five feel that being cost-effective and accountable is important. Virtually no one thinks these principles are not important.



### Mixed Views of Corporate Performance Relative to Guiding Principles

When asked to rate performance in relation to the guiding principles, approximately two-thirds each felt that CBC/Radio-Canada is doing a good job creating and delivering original, innovative, quality Canadian content (67%), reflecting and drawing together Canadians (64%), and actively engaging with audiences (62%).



Performance ratings were lowest when it came to being cost-effective and accountable (46%).

### Substantial Gaps Between Perceived Importance and Performance Ratings

There are fairly significant gaps between the importance attributed to each of the guiding principles and assessments of the Corporation's performance in each area.

**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

Phoenix SPI for CBC/Radio-Canada; January 2012

### ROLE OF NATIONAL PUBLIC BROADCASTING

Opinion leaders were asked about their perceptions of the role of national public broadcasting in Canada, including the impact of recent media coverage about this.

### Most Followed Media Discussion at Least to Some Extent

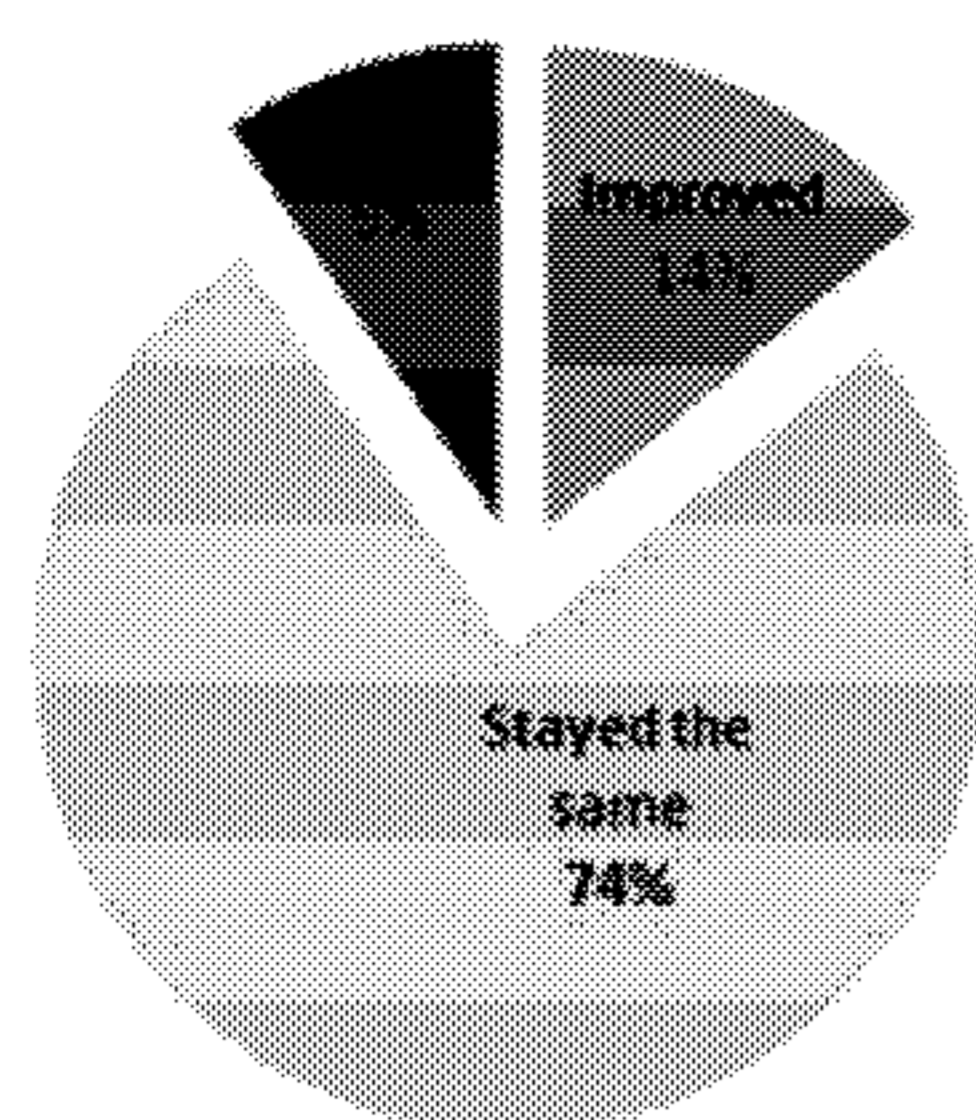
Most of the opinion leaders surveyed claimed to have followed the discussion in the media that took place over the past six months or so about CBC/Radio-Canada and the role of Canada's national public broadcaster and its value to Canadians. Almost one-quarter (24%) said they followed the discussion *very* closely, while an additional 53% paid moderate attention to it. In total, therefore, 77% said they followed the discussion at least moderately closely.

### Perceptions Largely Unchanged Despite Media Discussion

Three-quarters said their perception of CBC/Radio-Canada as Canada's national public broadcaster has not changed during the past six months or so. Those reporting a change were more likely to say their perception of the Corporation has improved (14%) rather than declined (9%).

## 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%

Phoenix SPI for CBC/Radio-Canada, January 2012

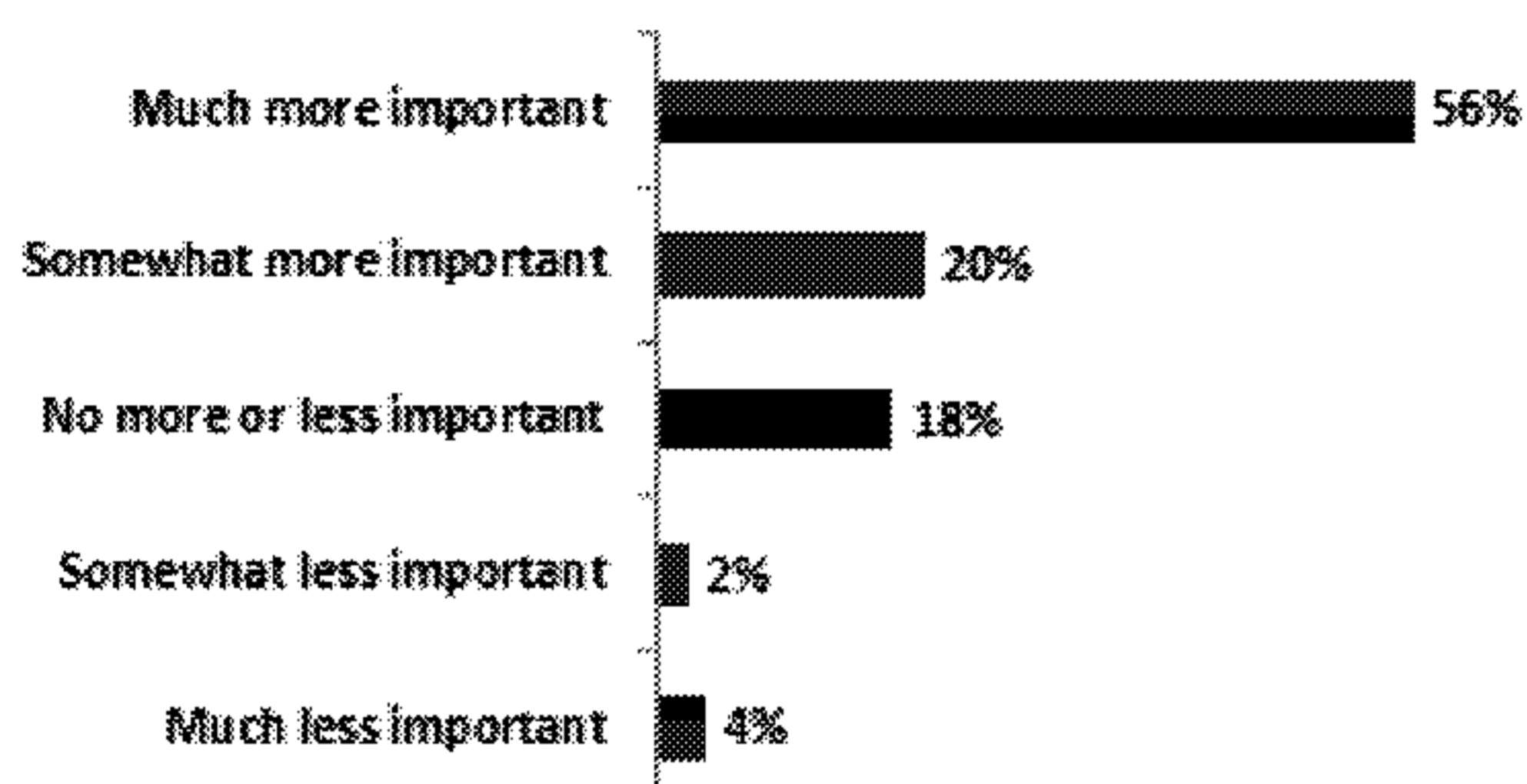
### Most Think Public Broadcaster is More Important as Landscape Changes

Not only do opinion leaders consider CBC/Radio-Canada to be important – against a back-drop of a rapidly evolving broadcasting landscape, characterized by increasing media convergence, proliferation of new technologies, and increasing content choices, 76% view the existence of a national public broadcaster in Canada as even more important than it was before (56% believe this is now *much* more important). Almost no one said this is now less important (6%).

### 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?

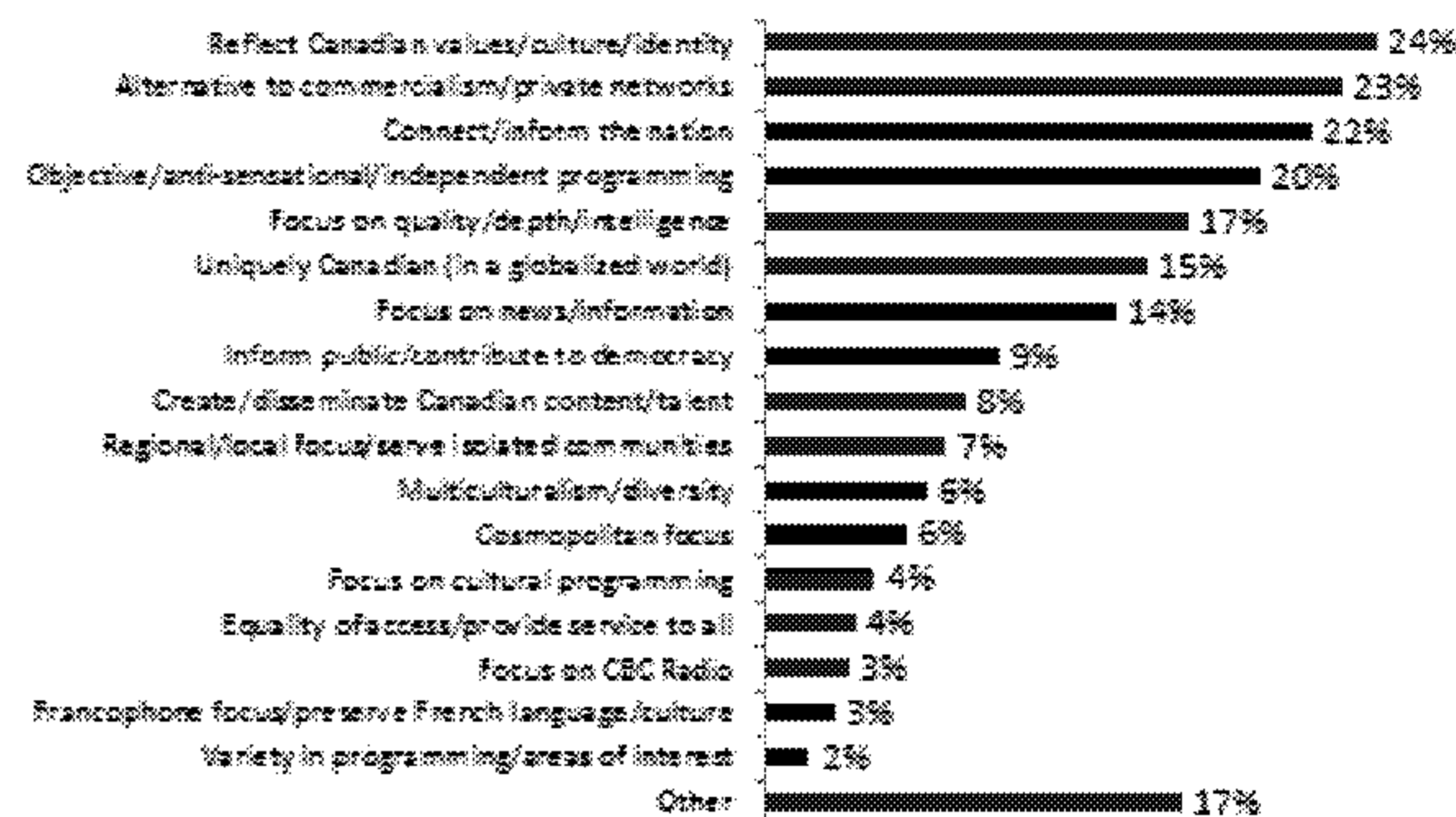


Base: N=410; all opinion leaders

While opinion leaders pointed to a wide variety of reasons to explain why it is important, most tended to focus on the role of the public broadcaster as the purveyor and protector of Canadian culture and its ability to operate unfettered by the demands of commercialism.

## Most Important Reason for Having a National Public Broadcaster

Q16: In your opinion, what is the most important reason for Canada to have a national public broadcaster?



Base: N=355; opinion leaders who provided a response  
Multiple responses accepted

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