

CBC/RADIO-CANADA 2013 STAKEHOLDER SURVEY

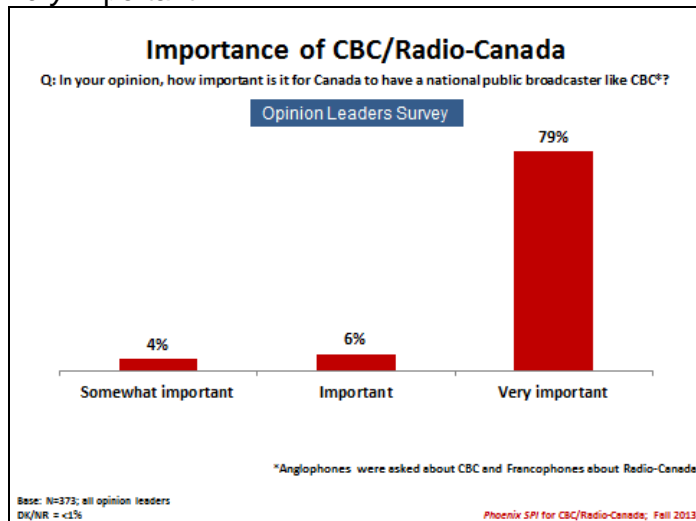
RESEARCH HIGHLIGHTS

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 obtain opinion leaders' views of the Corporation in key areas, and to track changes over time. In total, 373 opinion leaders completed the survey, representing a response rate of 21%. The survey was available online October 3rd – November 8th, 2013.

IMPORTANCE OF CBC/RADIO-CANADA

Clear Majority Say CBC/Radio-Canada is Important for Canada

The majority (89%) of opinion leaders say CBC/Radio-Canada is important for Canada. Approximately eight in ten (79%) selected the highest degree of importance (e.g., 9 or 10 on the 10-point scale), saying that CBC/Radio-Canada is very important.

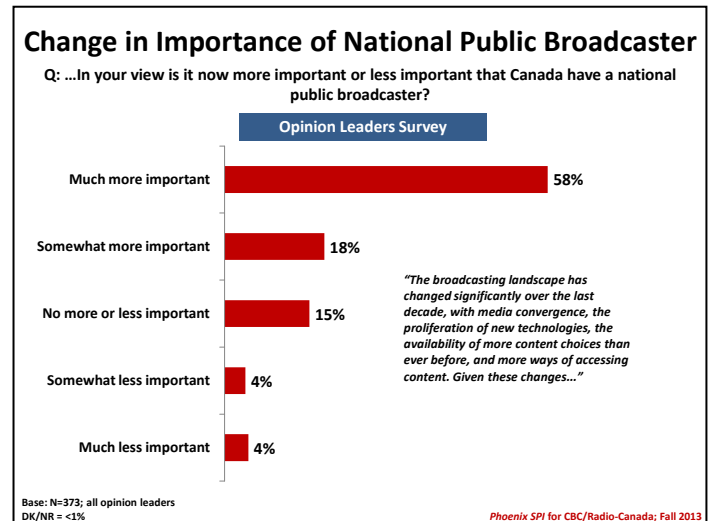


Perceptions of CBC/Radio-Canada's importance among opinion leaders has remained more or less consistent since tracking began in 2006.

Majority Say CBC/Radio-Canada is More Important for Canada

The majority of opinion leaders believe CBC/Radio-Canada has become more important for Canada.

Approximately three in four (76%) opinion leaders surveyed said it's more important that Canada have a national public broadcaster now than a decade ago, with 58% saying it's *much* more important.



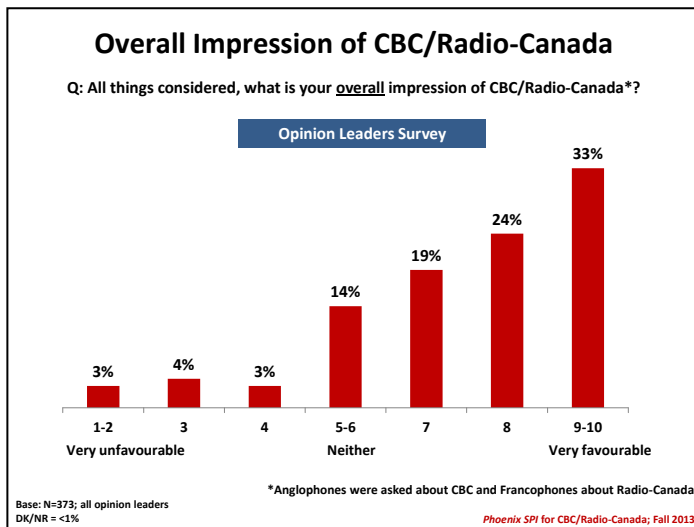
Of those who do not think CBC/Radio-Canada is more important for Canadians, 15% have neutral views. Only eight percent of opinion leaders surveyed feel CBC/Radio-Canada is less important now than ten years ago.

PERCEPTIONS OF CBC/RADIO-CANADA

Majority Have Positive Overall Impressions

The majority of opinion leaders have a positive impression of CBC/Radio-Canada. Approximately three in four (76%) opinion leaders reported having a favourable view of the Corporation (e.g., 7 – 10 on a 10-point scale), with exactly one third selecting the

highest values of 9 or 10, indicating a very favourable impression.



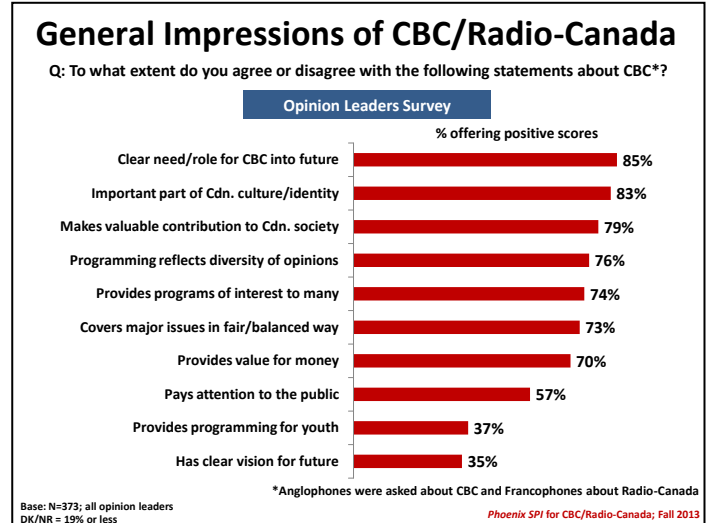
Among opinion leaders who did not give positive ratings, 14% are neutral. Only 10% have an unfavourable impression of CBC/Radio-Canada.

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/Radio-Canada into the future.*
- *CBC/Radio-Canada is an important part of Canadian culture and identity.*
- *CBC/Radio-Canada provides value for money to Canadian taxpayers.*
- *CBC/Radio-Canada has a clear vision of how to steer the Corporation into the future.*
- *CBC/Radio-Canada pays attention to what the public thinks about its programs and services.*
- *CBC/Radio-Canada's information programming reflects a diversity of opinions on a wide range of issues.*
- *CBC/Radio-Canada's information programming covers major issues in a fair and balanced way.*
- *CBC/Radio-Canada provides programs of interest to many different groups of people.*
- *CBC/Radio-Canada makes a valuable contribution to Canadian society.*

- *CBC/Radio-Canada provides programming where younger generations see themselves reflected.*



Perceptions of CBC/Radio-Canada tend to be positive in general. A majority of opinion leaders expressed agreement with most of these statements, although the size of the majority and the intensity of agreement varied considerably. Opinion leaders were most likely to think that there is a clear need and role for CBC/Radio-Canada into the future (85%), is an important part of Canadian culture and identity (83%), and that CBC/Radio-Canada makes a valuable contribution to Canadian society (79%). Additionally, a majority agreed that CBC/Radio-Canada has programming that reflects a diversity of opinions (76%), provides programs of interest to many (74%), covers major issues in a fair and balanced way (73%), and provides value for money (70%). A small majority (57%) of opinion leaders also agreed that CBC/Radio-Canada pays attention to what the public thinks about its programs and services.

Conversely, minorities of stakeholders agreed that CBC/Radio-Canada provides programming for youth (37%) or has a clear vision for the future (35%).

PERFORMANCE ASSESSMENTS: STRATEGIC PLAN

Strong Performance Ratings Vis-à-vis Strategic Direction Components

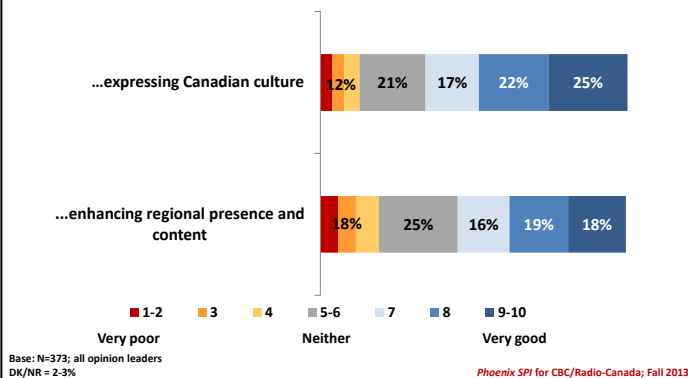
Opinion leaders think that CBC/Radio-Canada is performing reasonably well when it comes to the Corporation's strategic direction. Just under two in

three (64%) opinion leaders feel that CBC/Radio-Canada is currently doing a good job expressing Canadian culture. Approximately half (53%) said CBC/Radio-Canada is doing a good job enhancing regional presence and content.

Ratings of Performance Vis-à-vis Strategic Direction

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

Opinion Leaders Survey



Guiding Principles Seen to be Important

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

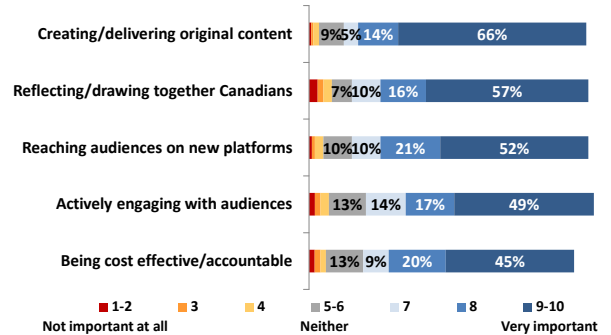
- *Creating and delivering original, innovative, quality Canadian content.*
- *Reaching audiences on emerging technologies and platforms.*
- *Reflecting and drawing together Canadians.*
- *Actively engaging with audiences.*
- *Being cost-effective and accountable.*

Majorities view each of these five principles as important. 85% think it is important for CBC/Radio-Canada to create and deliver original, innovative, quality Canadian content, with 66% indicating that this is very important. Approximately the same proportions think it is important for CBC/Radio-Canada to reflect and draw together Canadians (83%), as well as reach audiences on new platforms (83%). Exactly four in five stakeholders think it is important that CBC/Radio-Canada actively engages with audiences. Just under three quarters (74%) indicated it is important that CBC/Radio-Canada be cost effective and accountable.

Perceived Importance of Guiding Principles

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?

Opinion Leaders Survey



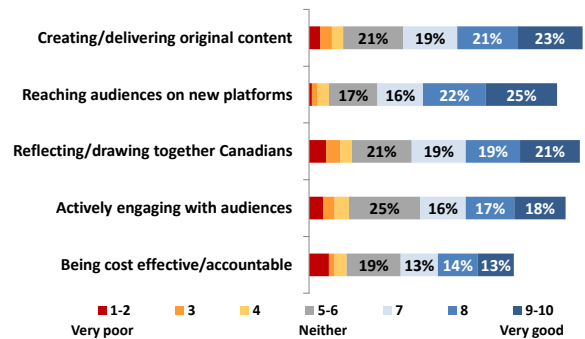
Mixed Views of Corporate Performance Relative to Guiding Principles

Turning to performance, opinions were mixed as to whether CBC/Radio-Canada is doing a good job with respect to each of the five guiding principles.

Ratings of 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?

Opinion Leaders Survey



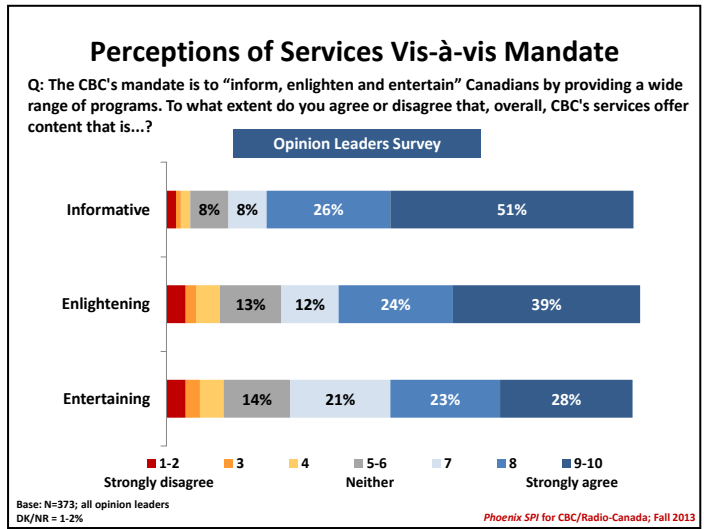
Just under two in three stakeholders (63%) feel that the broadcaster is doing a good job delivering original content. An equal proportion (63%) believe the Corporation is doing a good job of reaching audiences on new platforms. Slightly fewer (59%) think that CBC/Radio-Canada is performing well when it comes to drawing together Canadians. Following this, approximately half (51%) said that CBC/Radio-Canada is doing a good job of actively engaging audiences, with 25% assigning neutral

values (e.g., 5 or 6 on a 10-point scale) to CBC/Radio-Canada's performance with this principle. Finally, a minority (40%) of opinion leaders believe CBC/Radio-Canada is doing a good job being cost effective and accountable, with 28% indicating that they do not know or declining to respond.

PERCEPTIONS OF PROGRAMS/SERVICES

Widespread Agreement that CBC/Radio-Canada's Services Address Mandate

Opinions among stakeholders were mixed as to whether CBC/Radio-Canada informs, enlightens, and entertains Canadians by providing a wide range of programs. In all, 85% feel that the Corporation's services offer content that is informative, with 51% agreeing strongly that this is the case. Following this, exactly three quarters think that CBC/Radio-Canada's programs enlighten Canadians, although fewer (39%) agreed strongly with this.

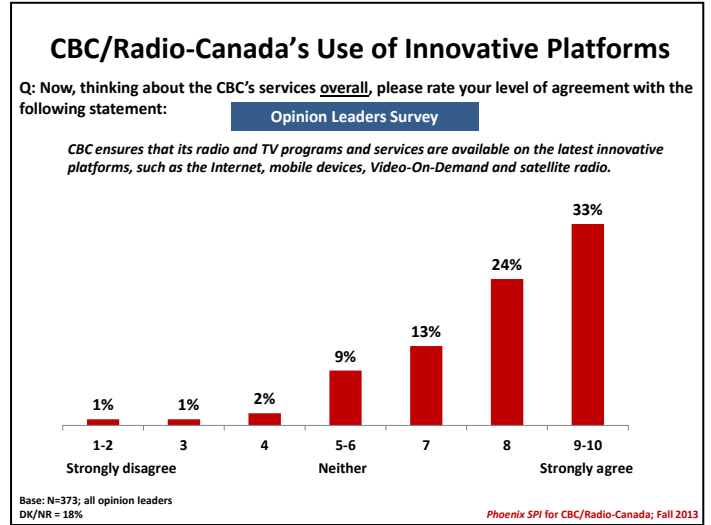


The aspect of the broadcaster's mandate that received the least positive assessment was entertaining. Nonetheless, a majority (72%) believe that CBC/Radio-Canada's services offer content that entertains Canadians.

CBC/Radio-Canada Seen to Use Innovative Platforms

Just over two in three (70%) surveyed stakeholders agreed that CBC/Radio-Canada ensures that its radio and television programs and services are

available on the latest innovative platforms, such as the internet, mobile devices, Video-On-Demand, and satellite radio, with exactly one third strongly agreeing. Nine percent of opinion leaders are neutral on whether CBC/Radio-Canada uses innovative platforms. Only 4% of stakeholders surveyed chose values below the mid-point.



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