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Research Report

STUDY ON THE ROLE AND COMPLEMENTARY NATURE OF PUBLIC AND PRIVATE TELEVISION CHANNELS IN QUÉBEC

Web Survey

DATE 2020-11-25 PROJECT NUMBER 14791-032



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CONTEXT, OBJECTIVES AND METHODOLOGY

METHODOLOGY

Léger conducted a study to assess Quebecers' perception of the role, mandate and types of content that must be offered by public and private television channels in Québec.



HOW? A **Web survey** was conducted among **Quebecers**.



WHO? **1,019 English- or French-speaking respondents** across Québec, **18 and over**

WHEN? Data collection took place between **November 6 and November 12, 2020**. The interviews – conducted on the Web via Leger's panel – **lasted an average of 8 minutes**.



WEIGHTING? Results were weighted according to **age, region, gender, mother tongue, education, and presence of minor children in the household** to ensure a representative sample of the Québec population.

NOTES FOR READERS

ROUNDING

The data presented have been rounded. As a result, totals may differ slightly from 100%.

SIGNIFICANT DIFFERENCES

Results with significant and relevant differences are indicated in a text box next to the presentation of the overall results.

*Data in **bold green** indicate a **significantly higher proportion** than other respondents. Conversely, data in **bold red** indicate a **significantly lower proportion** than other respondents.*



KEY FINDINGS

KEY FINDINGS TO RETAIN

- ✓ **The status of public television channels is quite familiar to respondents:** 88% of people say that Radio-Canada is a public channel, 76% say the same for Télé-Québec, and 71% for the CBC.
- ✓ 63% of respondents acknowledge that generalist public TV channels do not have the same mandate as private channels with respect to the content they broadcast. **Moreover, 81% of Quebecers agree that governments should ensure that the mandates of public channels are clear and precise to ensure that they are distinct from the mandates of private channels.**
- ✓ With respect to **Radio-Canada specifically**, even though 77% of people say they are aware that its mandate is to "inform, enlighten and entertain the general public," **41% consider that they have little knowledge of the specifics of this mandate and mission.** A similar finding is observed in terms of Radio-Canada's sources of funding (somewhat or very unfamiliar to 43%) and its priorities and decisions in terms of content in order to respect its mandate (somewhat or very unfamiliar to 52%). However, **93% of Quebecers agree that the Radio-Canada and CBC public television channels should be completely transparent about the financial management of their activities and the use of public funds.**

KEY FINDINGS TO RETAIN (CONTINUED)

- ✓ In terms of programming, **more than 50% of Quebecers consider that compared to private channels, the Radio-Canada and CBC public television channels have a duty to broadcast more of certain types of content**, such as documentaries, current events and local news, investigative journalism and international news, as well as local productions. Even if **a private channel has a role to play in promoting certain social issues, study results nevertheless indicate that public channels should set an example on several aspects, such as national awareness and identity, various forms of diversity** (regional, cultural, ethical, physical, gender equality) and **promote emerging producers and actors**.
- ✓ **More than three-quarters of respondents (78%) agree that it would be in the public's interest for the content of public and private channels to be complementary and not in direct competition**, while 72% agree that it is still acceptable for public and private channels to compete by offering similar content. In fact, **about two in three respondents (67%) believe that the mandate of the Radio-Canada and CBC public television channels should include the responsibility to not interfere directly with the management and financial profitability of private channels**.
- ✓ In terms of financing, the **offer of paid content by a public channel is perceived as somewhat or completely unacceptable by 72% of the Québec population** (versus 38% for private channels). A similar result can be observed when the question is asked specifically for the paid digital service, Tou.TV Extra, offered by Radio-Canada, which obtains an **unacceptability rate of 74%**.



DETAILED RESULTS



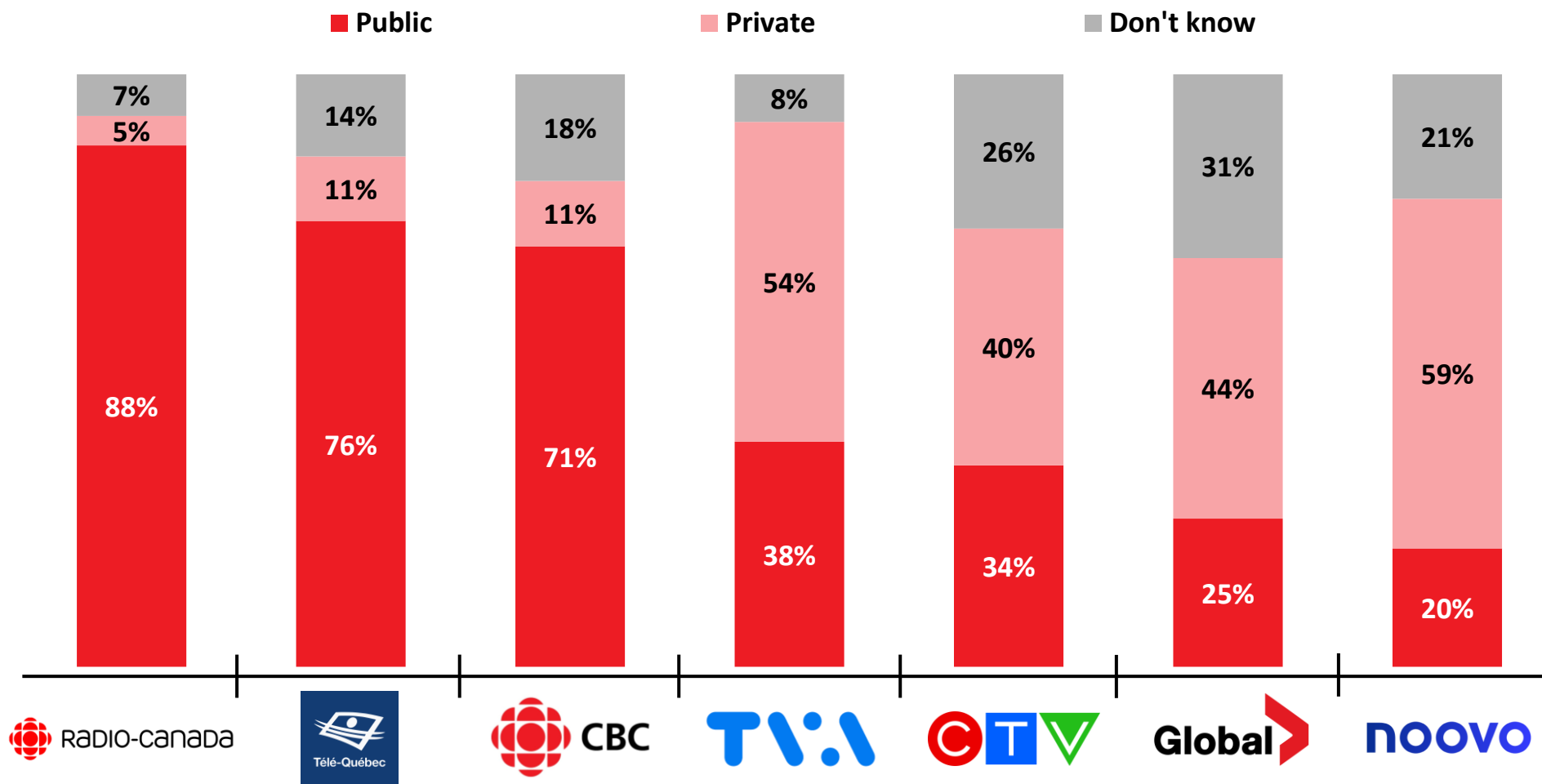
DETAILED RESULTS

1. DEFINITION AND KNOWLEDGE OF PUBLIC VS. PRIVATE CHANNELS

KNOWLEDGE OF OWNERSHIP OF CERTAIN GENERALIST TV CHANNELS

Q1. To the best of your knowledge, are the following generalist TV channels available in Québec public channels or private channels?

Base: All respondents (n=1,019)



The general public seems to have a better knowledge of the status of public channels than private channels.

For example, 88% of respondents say that Radio-Canada is a public channel, while for TVA, responses are more varied: 54% associate it with a private channel and 38% believe it is a public channel.

PRESENTATION OF THE TELEVISION CHANNEL CATEGORIES

Information presented in the survey

In television, there are two main categories of TV channels:

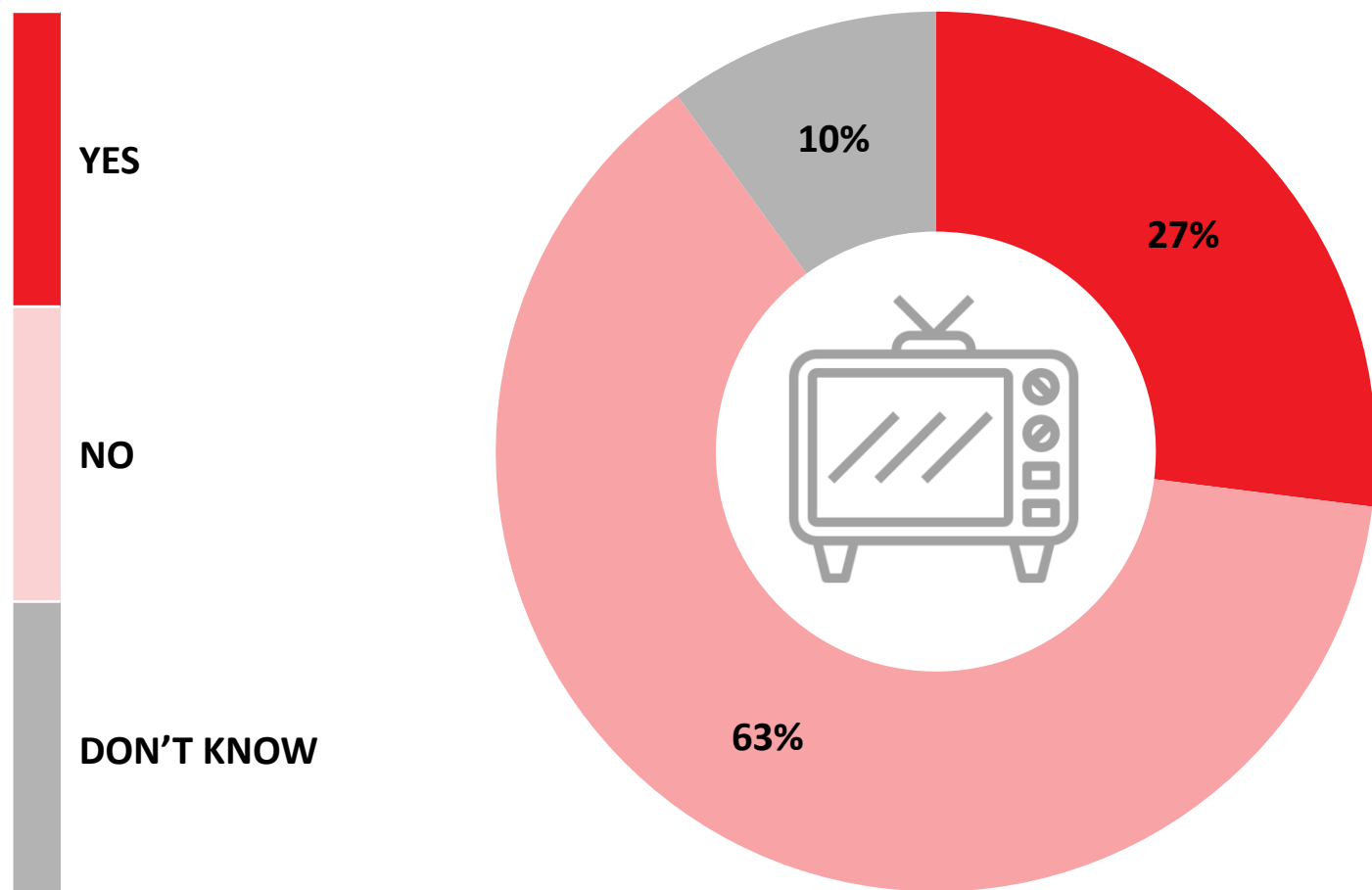
- **Public TV channels:** These channels are owned by the government (federal or provincial government) and are largely publicly funded. In Québec, this is the case for Radio-Canada, CBC, and Télé-Québec.
- **Private TV channels:** These channels are owned by private companies and are mainly financed by revenues from the advertising they broadcast on air. In Québec, this is the case for generalist channels such as TVA, Noovo, CTV and Global.

Please read the above definitions carefully before continuing with the survey.

PERCEPTION OF THE MANDATE OF PUBLIC AND PRIVATE CHANNELS

Q2. In your opinion, do public and private TV channels have the same mandate / mission / social responsibilities in relation to the content they broadcast?

Base: All respondents (n=1,019)

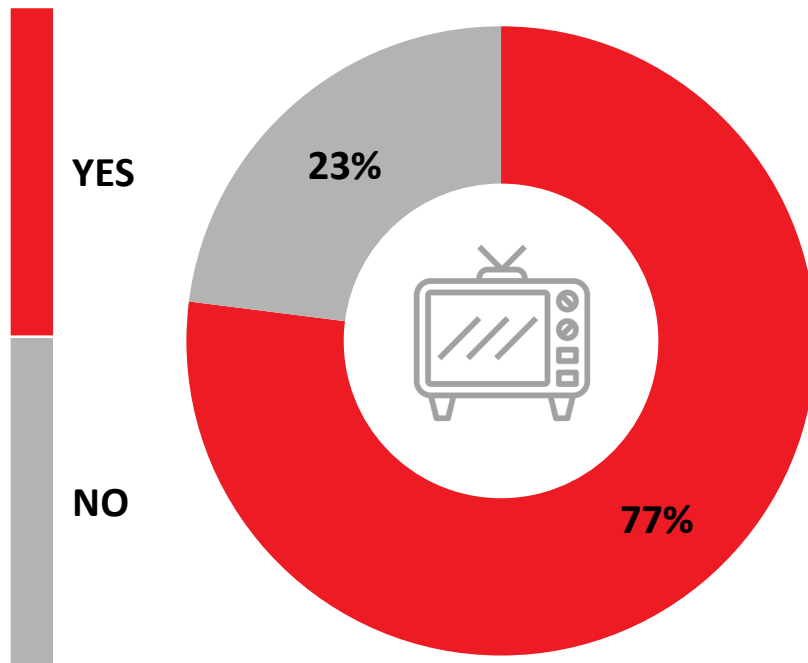


Although the response is **not unanimous**, **most** respondents recognize that **public generalist television channels do not have the same mandate** as private channels with respect to the content they broadcast.

KNOWLEDGE AND PERCEPTION OF RADIO-CANADA'S AND CBC'S MANDATE

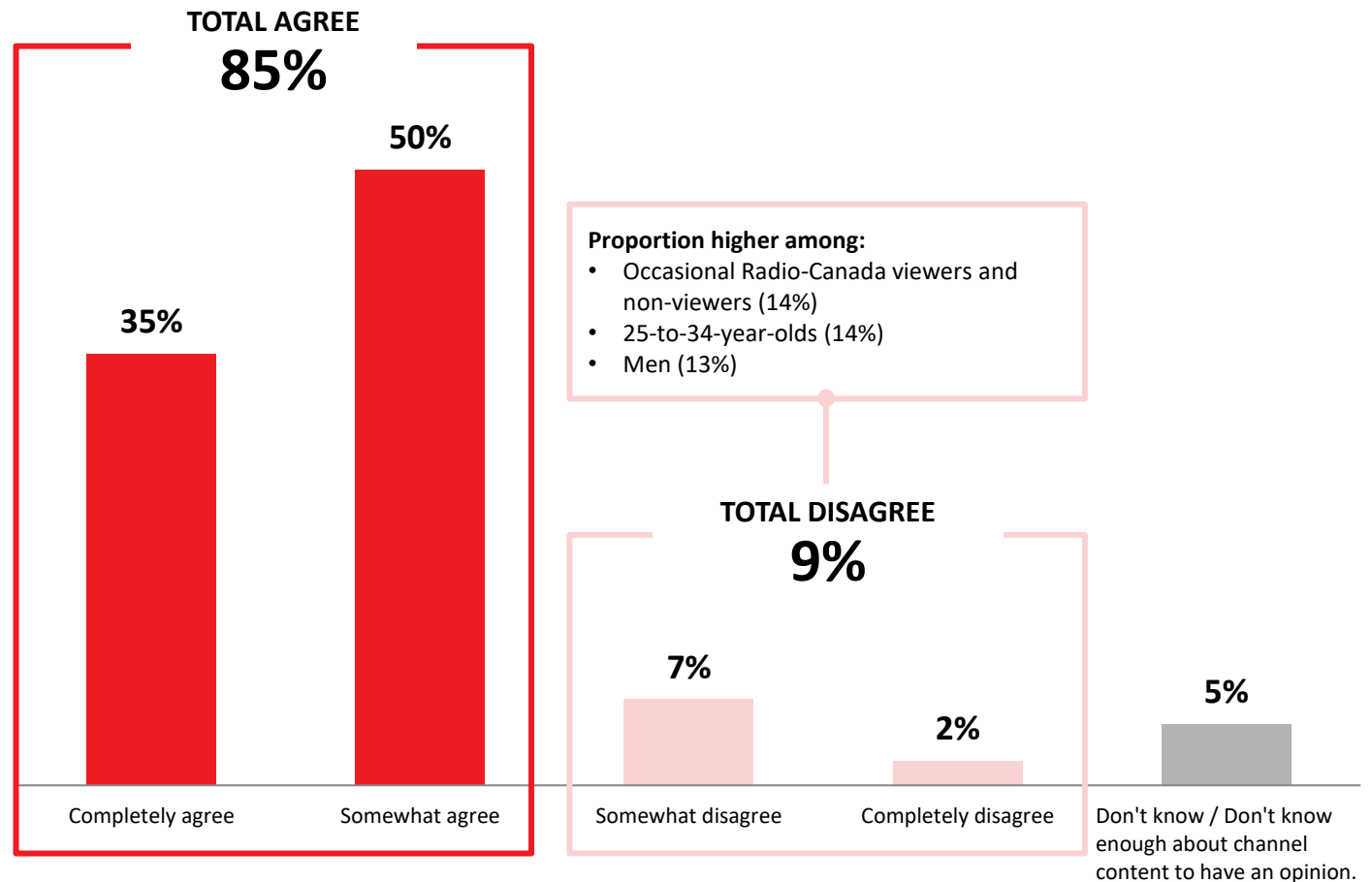
Q3A. The mandate of the Radio-Canada and CBC public television channels is to "inform, enlighten and entertain" the general public. Were you aware of this?

Base: All respondents (n=1,019)



Q3B. To what extent do you agree that the Radio-Canada and CBC public television channels fulfill their mandate: "Inform, enlighten and entertain the general public"?

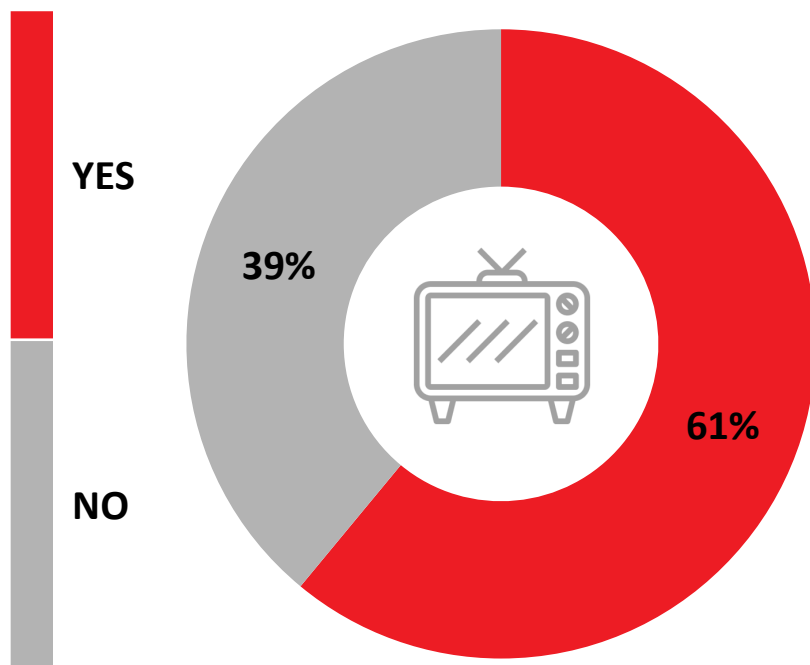
Base: All respondents (n=1,019)



KNOWLEDGE AND PERCEPTION OF TELE-QUÉBEC'S MANDATE

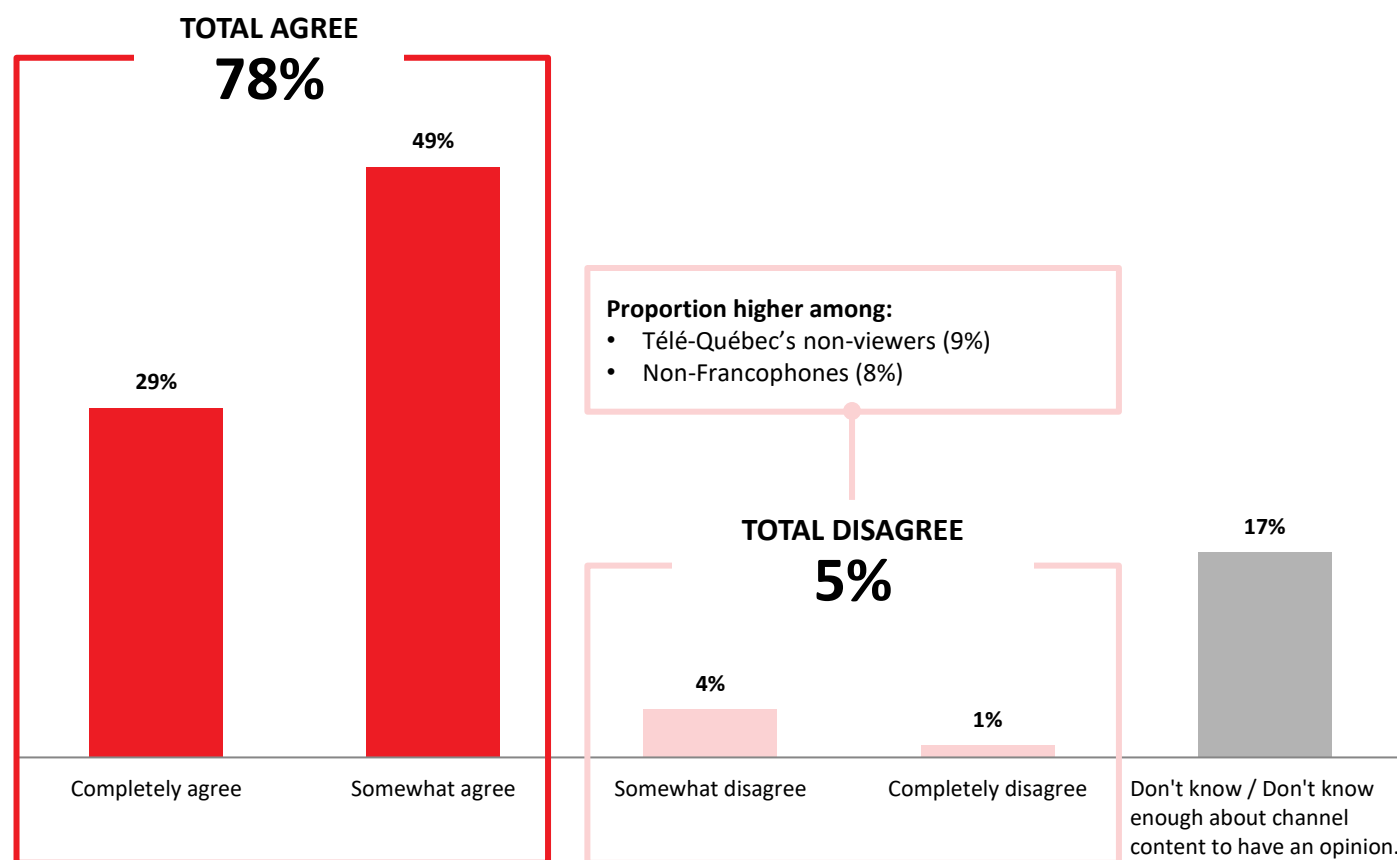
Q4A. The mandate of the Télé-Québec public television channel is to offer programming aimed at "developing a taste for knowledge, fostering the acquisition of knowledge, promoting artistic and cultural life and reflecting the regional realities and diversity of Québec society." Were you aware of this?

Base: All respondents (n=1,019)



Q4B. To what extent do you agree that the Télé-Québec public television station fulfills its mandate: "Offering programming aimed at developing a taste for knowledge, fostering the acquisition of knowledge, promoting artistic and cultural life and reflecting the regional realities and diversity of Québec society"?

Base: All respondents (n=1,019)



LEVEL OF AGREEMENT WITH STATEMENTS RELATED TO THE ROLES OF PUBLIC AND PRIVATE CHANNELS

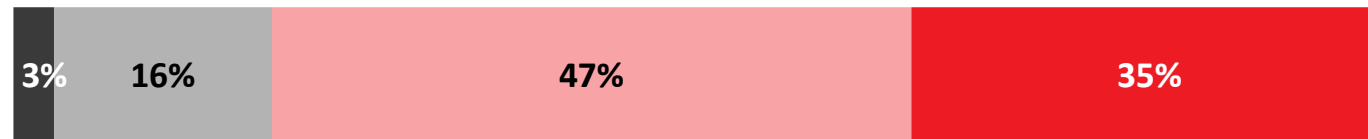
Q5. To what extent do you agree with the following statements regarding public (e.g., Radio-Canada, CBC, Télé-Québec) and private (e.g., TVA, Noovo, CTV, Global) television channels?

Base: All respondents (n=1,019)

■ Completely disagree ■ Somewhat disagree ■ Somewhat agree ■ Completely agree

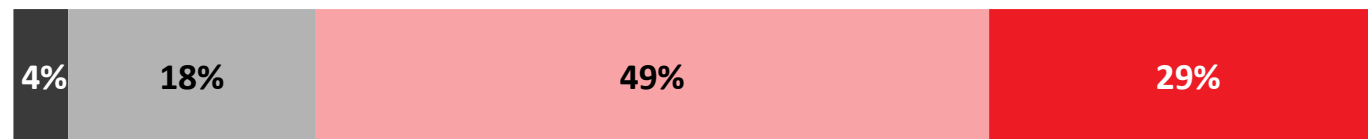
TOTAL AGREE

Governments should ensure that the mandate of public TV channels is clear and specific in order to distinguish them from private TV channels.



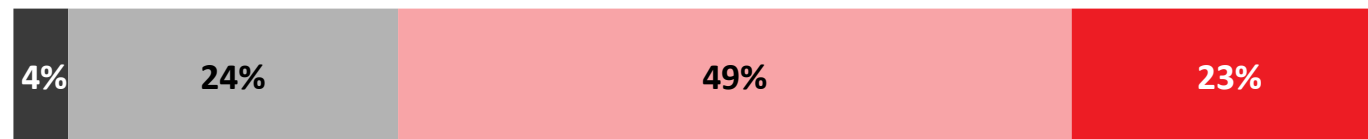
81%

Despite their respective mandates (vision, role, responsibilities, sources of revenue), it would be in the public's interest for the content of public and private channels to be complementary and not in direct competition with each other.



78%

Despite their respective mandates (vision, role, responsibilities, sources of revenue), it is acceptable for public channels to compete directly with private channels by offering similar content.



72%



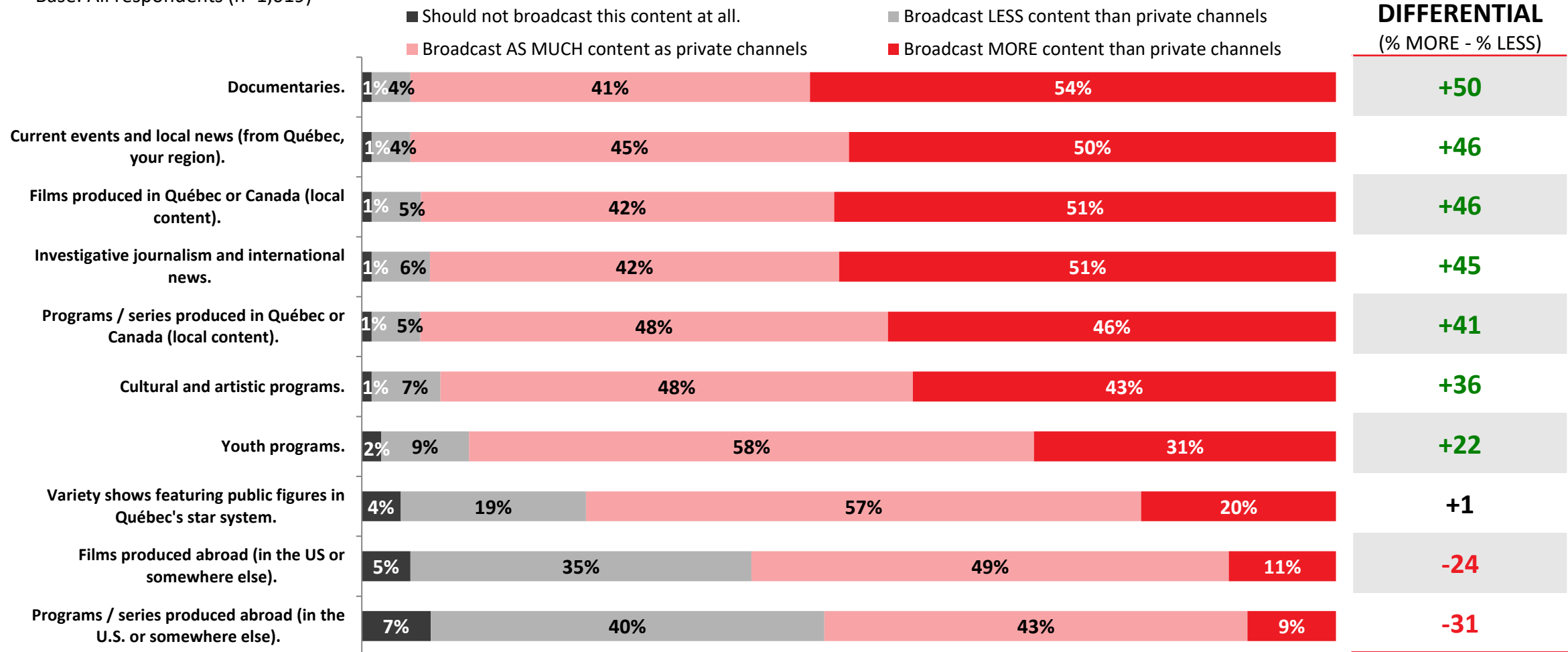
DETAILED RESULTS

2. CONTENT BROADCAST BY THE CBC/R-C VS PRIVATE CHANNELS

PERCEPTION OF THE TYPES OF CONTENT THAT SHOULD BE BROADCAST BY R-C / CBC COMPARED TO PRIVATE CHANNELS

Q6. As part of their mandate, should the Radio-Canada and CBC public television channels broadcast, MORE, AS MUCH or LESS TV content in the following categories than private television channels (e.g., TVA, Noovo, CTV, Global):

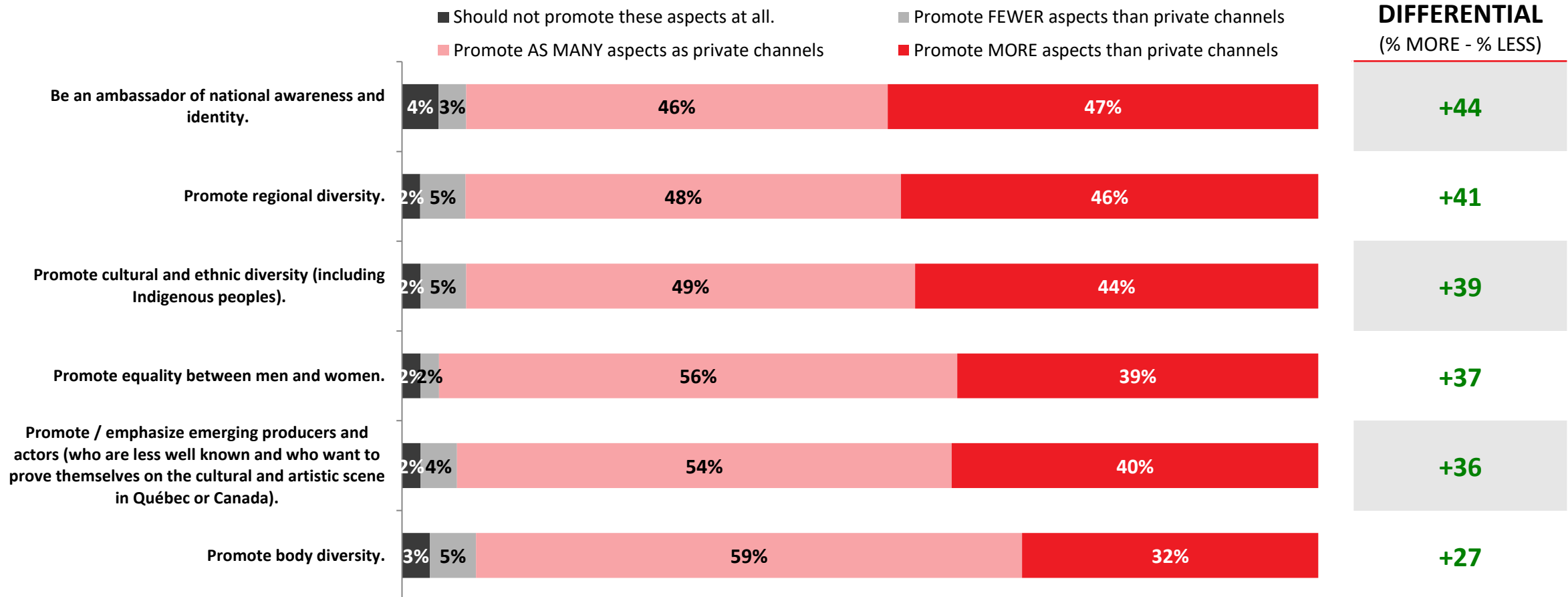
Base: All respondents (n=1,019)



PERCEPTION OF THE ELEMENTS THAT SHOULD BE EMPHASIZED AND PROMOTED BY R-C / CBC COMPARED TO PRIVATE CHANNELS

Q7. Should the Radio-Canada and CBC public television channels have a mandate to promote and emphasize, MORE, AS MANY or FEWER of the following aspects through the content they broadcast (whether in terms of feature performers, hosts, topics and themes covered in their shows, etc.) than private television channels (e.g. TVA, Noovo, CTV, Global):

Base: All respondents (n=1,019)





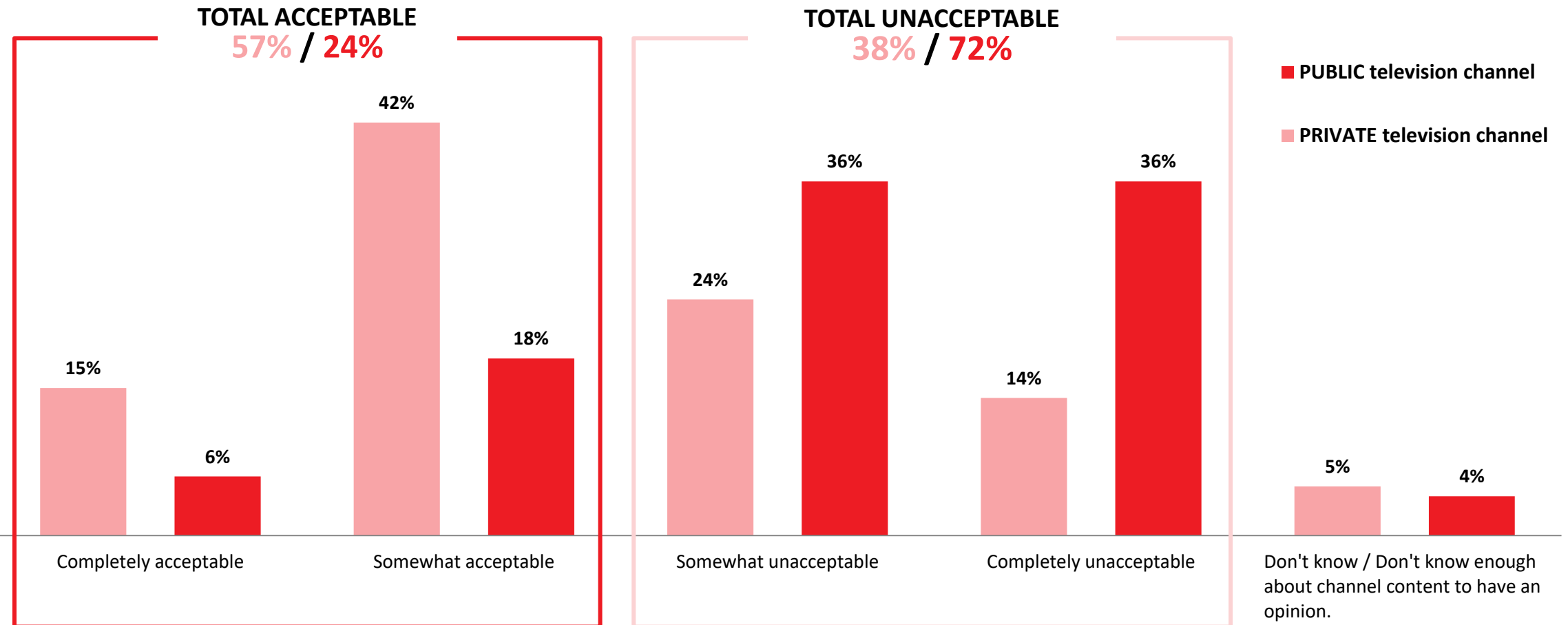
DETAILED RESULTS

3. SOURCES OF REVENUE AND MANDATE MONITORING FOR PUBLIC CHANNELS

LEVEL OF ACCEPTABILITY OF THE OFFERING OF PAID CONTENT BY PUBLIC AND PRIVATE CHANNELS

Q8/9. Generalist television channels may also broadcast content on digital platforms. In your opinion, is it acceptable for some of the content (programs, series, movies, etc.) broadcast by a **PUBLIC**/**PRIVATE** television channel to be paid content and only accessible to (paying) subscribers?

Base: All respondents (n=1,019)



LEVEL OF ACCEPTABILITY OF THE OFFERING OF PAID CONTENT BY PUBLIC AND PRIVATE CHANNELS (CONTINUED)

Q8/9. Generalist television channels may also broadcast content on digital platforms. In your opinion, is it acceptable for some of the content (programs, series, movies, etc.) broadcast by a PUBLIC/PRIVATE television channel to be paid content and only accessible to (paying) subscribers?

Base: All respondents (n=1,019)

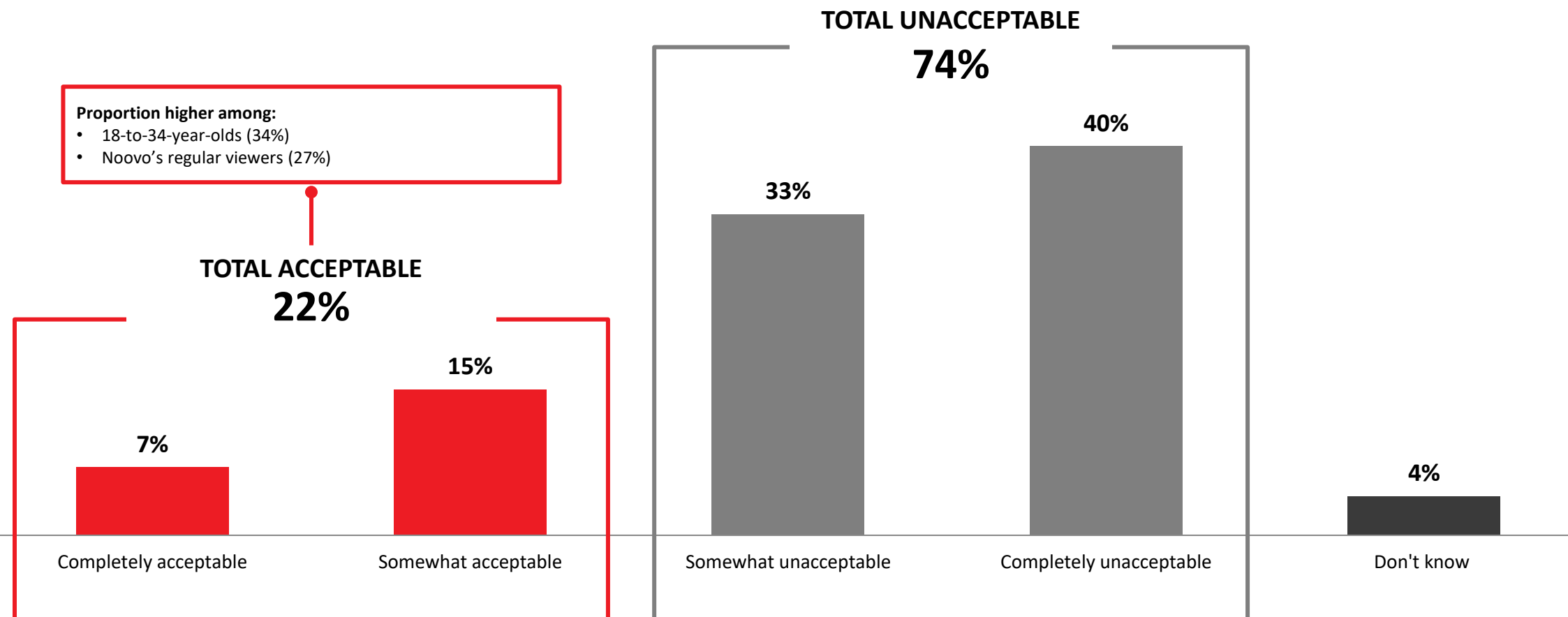
	PUBLIC Television Channel						PRIVATE Television Channel					
	TOTAL	GENDER		AGE			TOTAL	GENDER		AGE		
		Male	Female	18-34	35-54	55+		Male	Female	18-34	35-54	55+
n=	1,019	489	530	243	374	402	1,019	489	530	243	374	402
TOTAL ACCEPTABLE	24%	26%	22%	35%	26%	16%	57%	61%	54%	71%	59%	48%
Completely acceptable	6%	7%	5%	8%	6%	5%	15%	17%	13%	21%	16%	12%
Somewhat acceptable	18%	19%	18%	27%	20%	11%	42%	43%	41%	50%	43%	36%
TOTAL UNACCEPTABLE	72%	70%	74%	61%	69%	81%	38%	34%	42%	25%	36%	48%
Somewhat unacceptable	36%	34%	37%	39%	32%	37%	24%	21%	26%	20%	20%	29%
Completely unacceptable	36%	35%	38%	22%	38%	44%	14%	13%	16%	5%	16%	18%
Don't KNOW	4%	4%	4%	4%	5%	3%	5%	5%	4%	4%	5%	5%

Less than one quarter of the population (24%) believe that it is acceptable for a public television channel to offer paid content, compared to 57% acceptability for private channels. Generally speaking, people under the age of 35 are more open to the offering of paid content, whether it comes from a public (34%) or private (71%) channel.

LEVEL OF ACCEPTABILITY OF RADIO-CANADA'S OFFERING OF PAID CONTENT VIA THE TOU.TV EXTRA SERVICE

Q10. Radio-Canada offers a paid, on-demand service online, Tou.tv Extra, for \$6.99 a month. The content broadcast on Tou.tv Extra is available exclusively to (paying) subscribers. In your opinion, is it acceptable or unacceptable for Radio-Canada, as a government funded public television channel, to offer paid content to subscribers only?

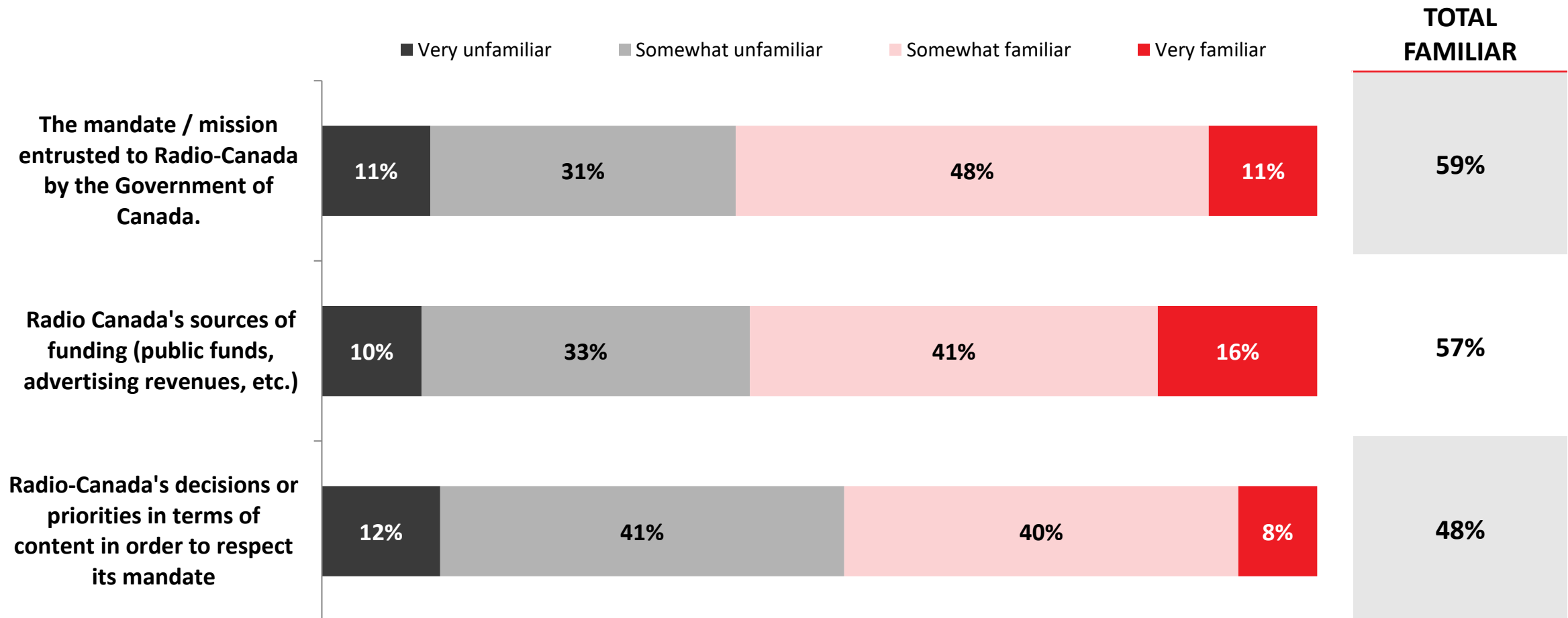
Base: All respondents (n=1,019)



KNOWLEDGE OF RADIO-CANADA'S MANDATE, FUNDING SOURCES AND CONTENT PRIORITIES

Q11. Before today, would you say that you were very familiar, somewhat familiar, somewhat unfamiliar or very unfamiliar with following about Radio-Canada:

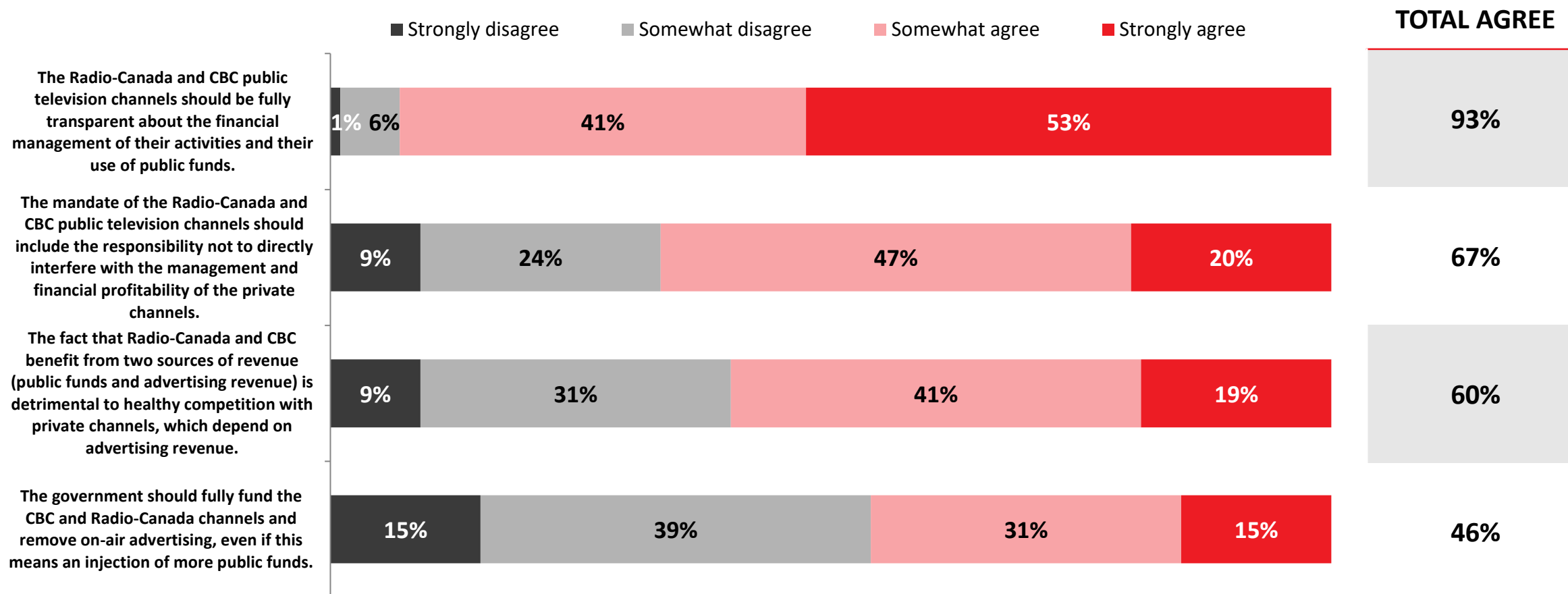
Base: All respondents (n=1,019)



LEVEL OF AGREEMENT WITH CERTAIN ASSERTIONS RELATED TO THE ROLE AND FUNDING OF PUBLIC AND PRIVATE CHANNELS

Q12. Currently, generalist television channels are funded by advertising revenues. For their part, the Radio-Canada and CBC public television channels are largely funded by the Government, as well as the advertising revenues they receive. Knowing this, to what extent do you agree with the following statements?

Base: All respondents (n=1,019)










A person with long brown hair is sitting on a grey couch, holding a black remote control. They are facing a television set on a white and wood-grain cabinet. The TV screen displays a grid of many small, colorful channel thumbnails. To the right of the TV, there is a small potted plant and a grey speaker. A semi-transparent dark grey banner is overlaid across the lower half of the image, containing the text "CHANNEL VIEWING PROFILE" in white capital letters.

CHANNEL VIEWING PROFILE

VIEWING FREQUENCY OF GENERALIST TV CHANNELS

Q13. Regardless of the device (television, computer, tablet, mobile, etc.) or manner used (linear TV, recorded, online), how often do you watch video content on the following generalist TV channels?

Base: All respondents (n=1,019)

		 RADIO-CANADA					
REGULAR VIEWERS	59%	59%	43%	28%	19%	16%	17%
Every day	37%	31%	15%	5%	7%	4%	5%
4-6 days a week	11%	14%	14%	7%	4%	4%	4%
2-3 days a week	12%	15%	13%	16%	8%	8%	7%
OCCASIONAL VIEWERS	23%	24%	23%	43%	24%	22%	30%
Once a week	8%	8%	8%	14%	6%	5%	6%
2-3 days a week	6%	6%	6%	10%	6%	6%	7%
Once a month or less often	10%	10%	9%	18%	12%	12%	16%
NON-VIEWERS	17%	17%	34%	29%	56%	62%	54%



RESPONDENT PROFILE

SOCIO-DEMOGRAPHIC PROFILE

Base: All respondents

TOTAL
(n=1,019)

GENDER

Male	49%
Female	51%

AGE

18 to 34	26%
35 to 54	33%
55 or over	41%

MOTHER TONGUE

Francophones	77%
Non-Francophones	23%

REGION

Montréal CMA	50%
Québec City CMA	10%
Other regions	40%

PRESENCE OF CHILDREN IN THE HOUSEHOLD

Yes	24%
No	75%

Base: All respondents

TOTAL
(n=1,019)

OCCUPATION

Full-time employee	47%
Part-time employee	7%
Homemaker	3%
Student	8%
Retired	28%
Employment Insurance or unemployed	4%

HOUSEHOLD INCOME

\$19,999 or less	7%
\$20,000 to \$39,999	17%
\$40,000 to \$59,999	18%
\$60,000 to \$79,999	15%
\$80,000 to \$99,999	13%
\$100,000 or more	21%

EDUCATION

Primary/Secondary	31%
College	43%
University	25%

Note: For each of the profile categories, the complement to 100% corresponds to "Don't know" and "Refusal".

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