



**Canadians' Views
On De-regulating Cable and Other TV
Distributors**

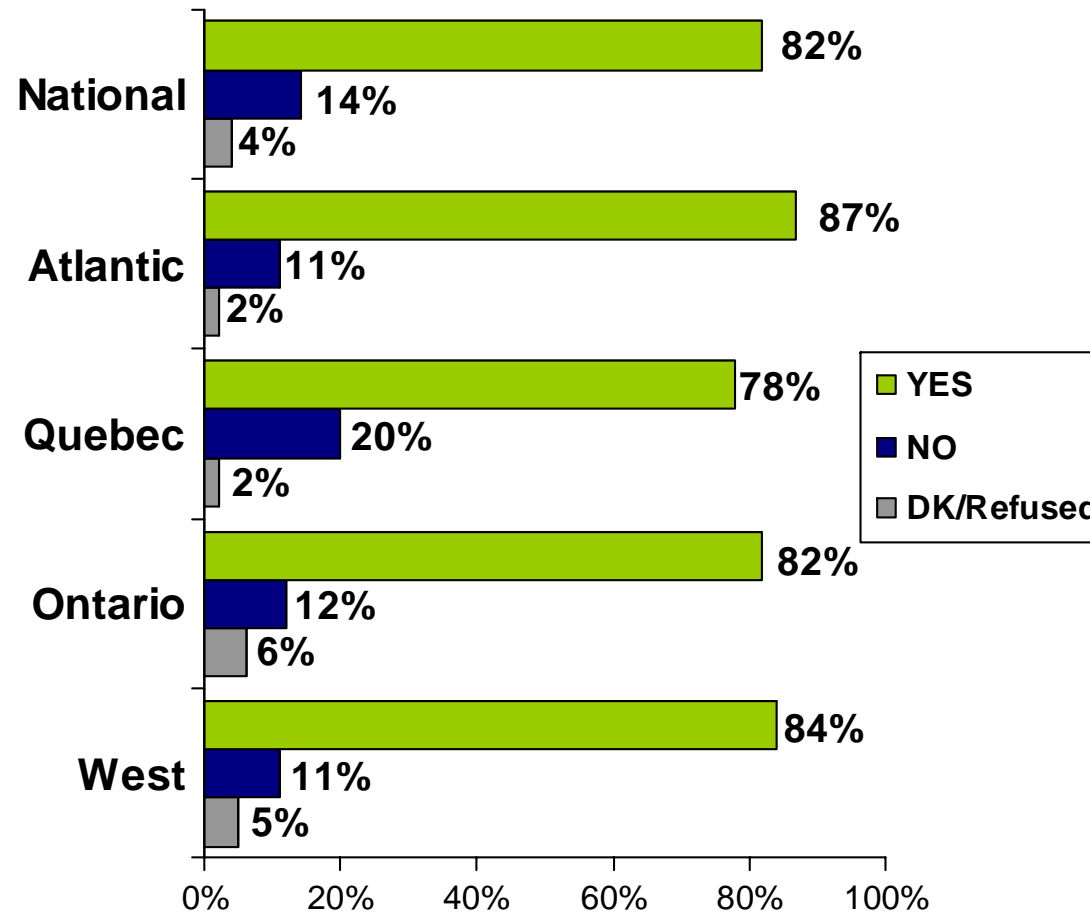
Presentation Deck

March 2008

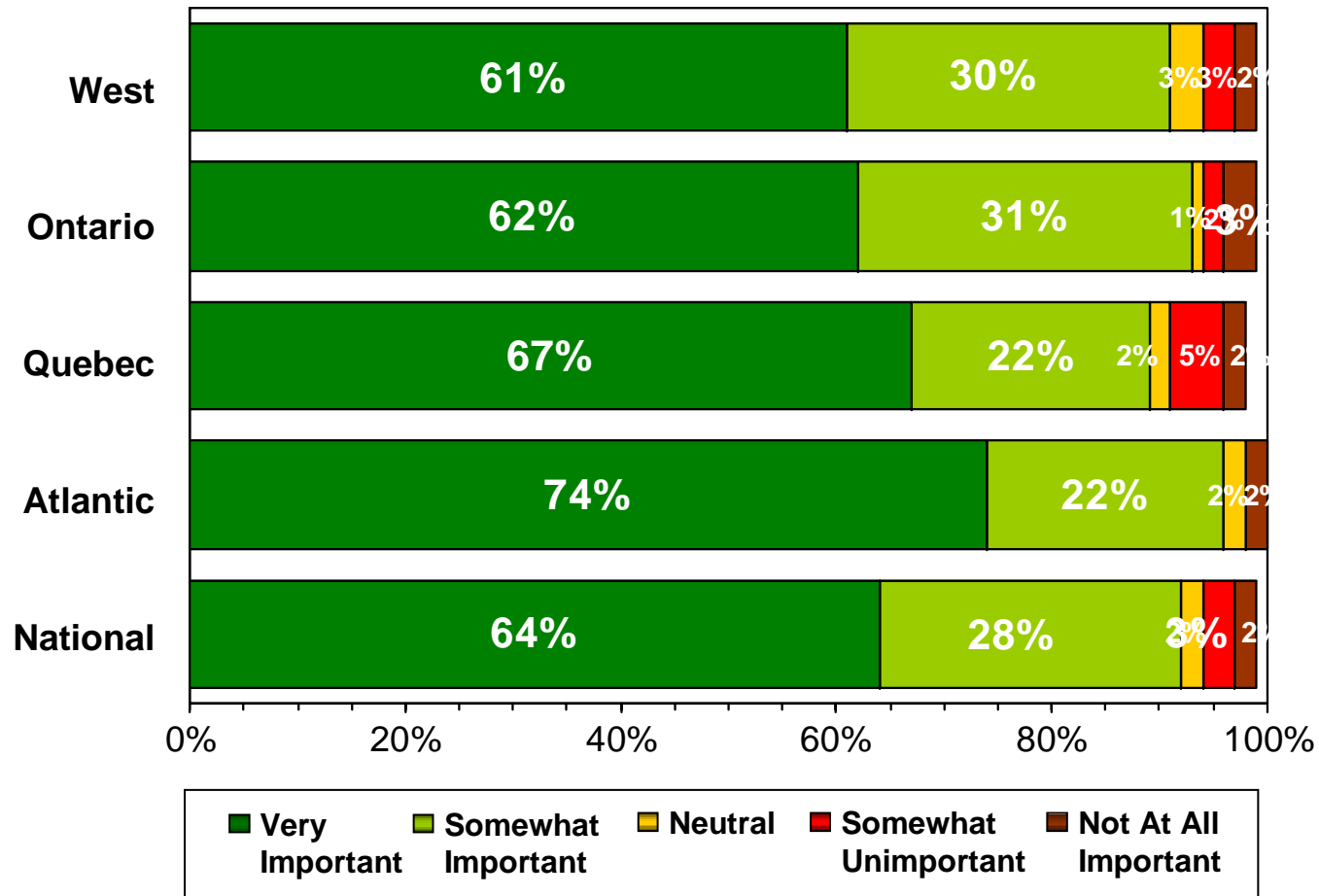
Key Findings

- Viewers consider themselves to have strong Canadian identity and values that they expect to see reflected on television
- Canadians see television as a **cultural trust**, as well as an important part of a vital Canadian economy, rather than just a business issue
- Canadians bestow that trust on the CTRC and the federal government, and expect them to protect and nurture it
- Canadians do not trust that cable and satellite television distributors – left to their own devices in an unregulated environment - will protect, promote or deliver Canadian programming on television

Canadians feel strongly about their unique values and identity. Quebec's scores are also very strong, especially in the context of their own potent cultural identity

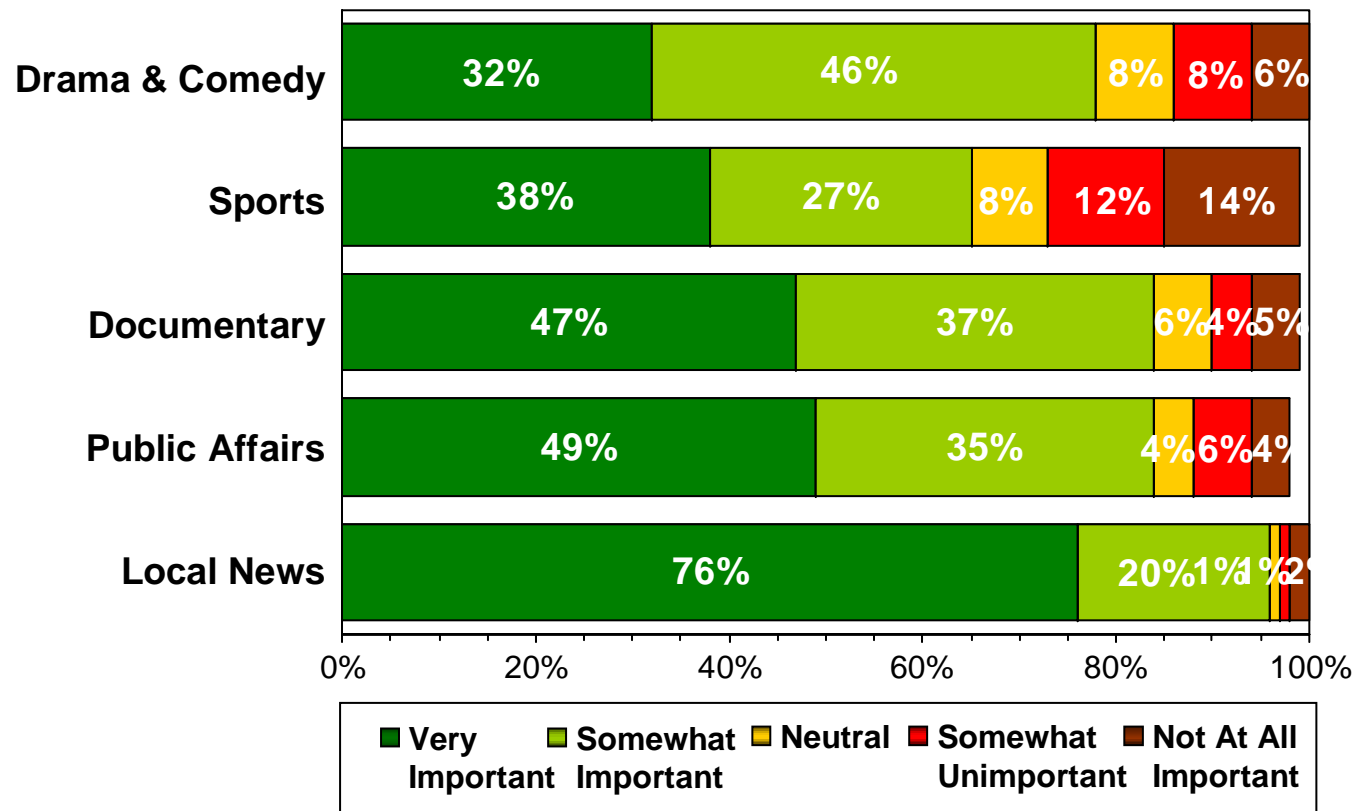


Preserving Canadian values and identity is very important or important to nearly all Canadians. Atlantic provinces and Quebec appear to be the strongest advocates of Canadian identity (very important)



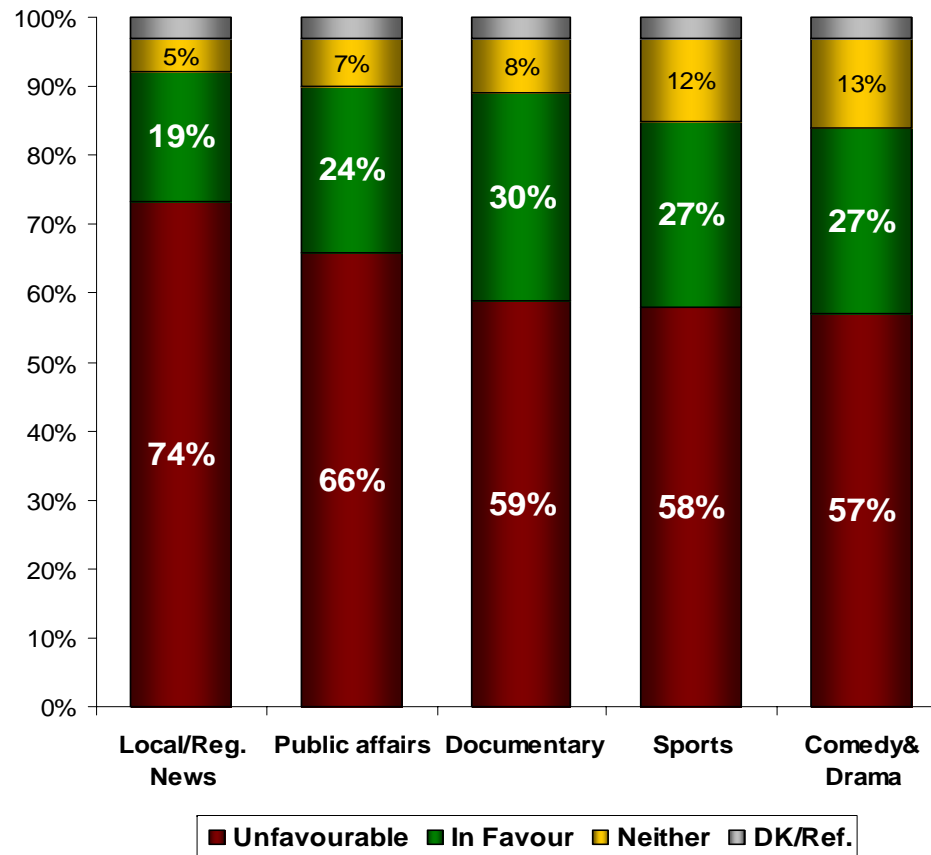
Q13. Is preserving Canadian values and identity important to you?

In terms of Canadian TV content, there is an overwhelming support for local/regional news, as well as documentaries and public affair programs



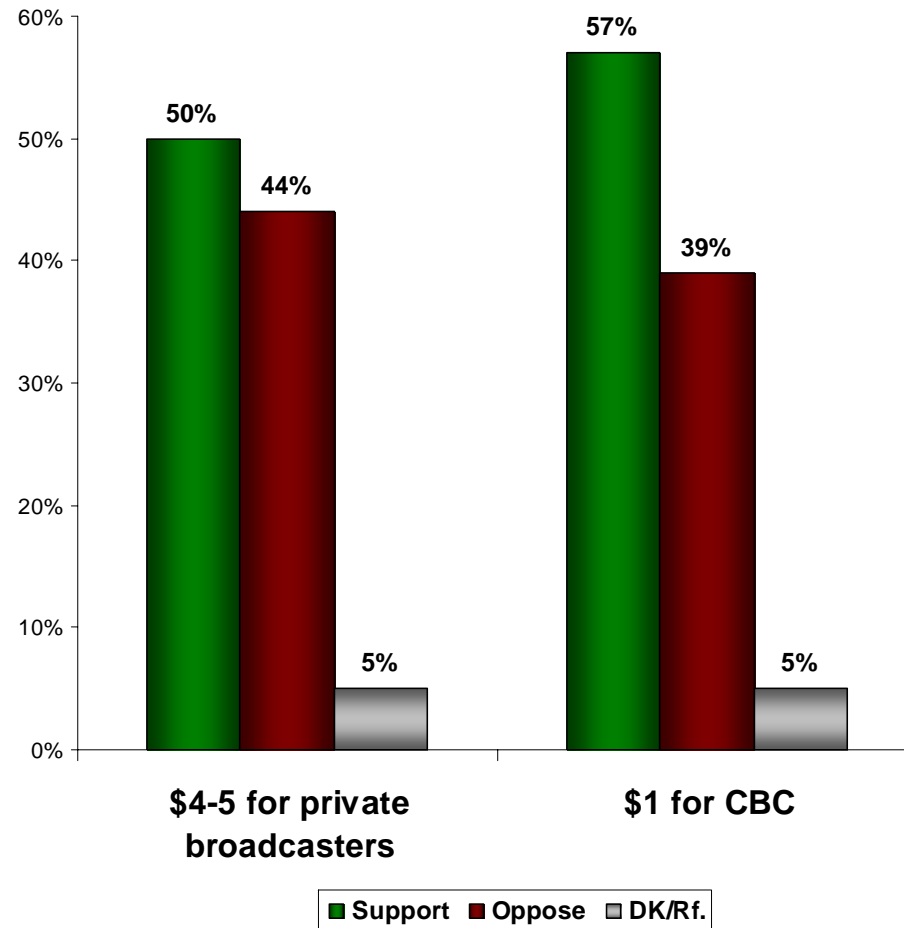
Q14A. Is it important to you to have the following types of Canadian created content on TV? (ASK FOR EACH) Local/regional news

Replacing Canadian with foreign programming is strongly opposed across all main program types

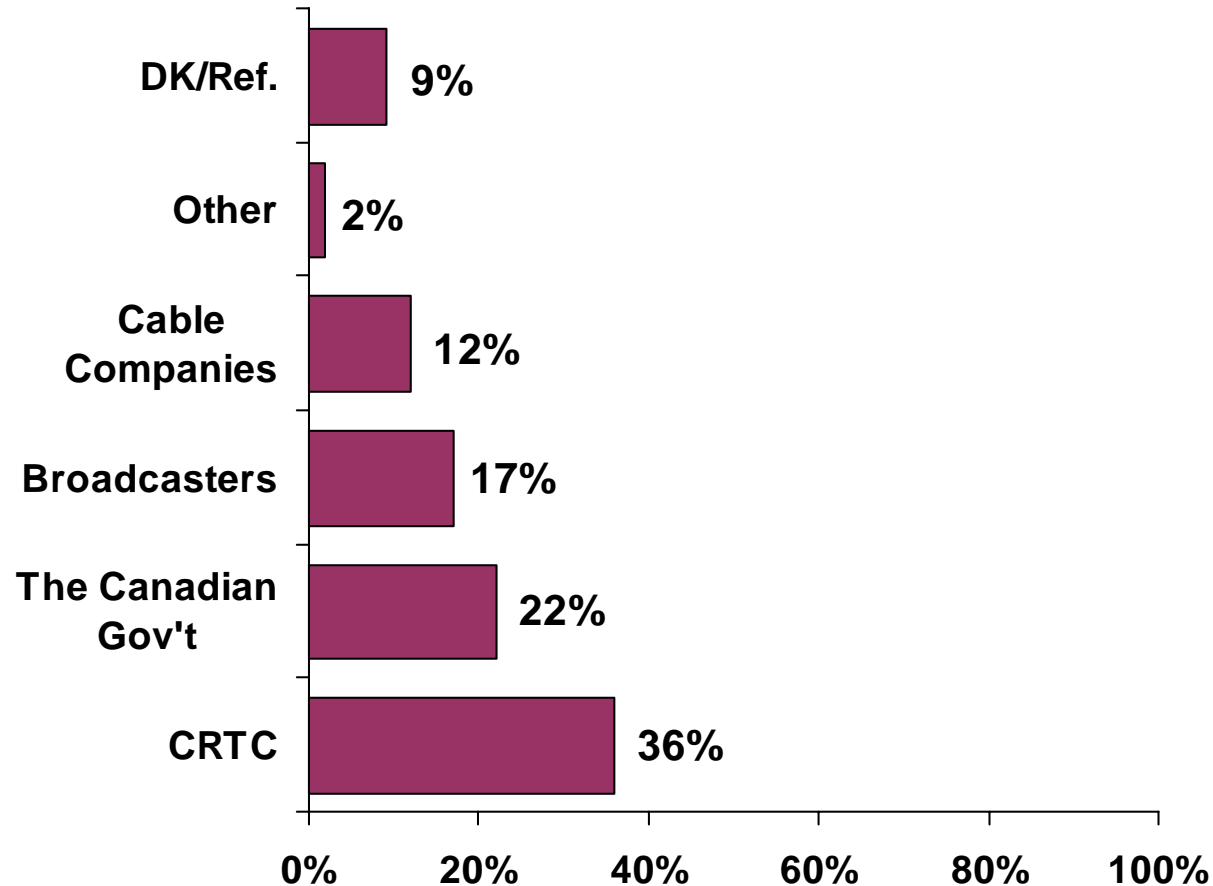


Q18A-E. Would you be in favour of replacing the following Canadian programming by foreign programming that might be more profitable to acquire by your cable or satellite provider?

At least half of Canadians support paying more for channels they currently receive for free in order to support and enhance Canadian programming

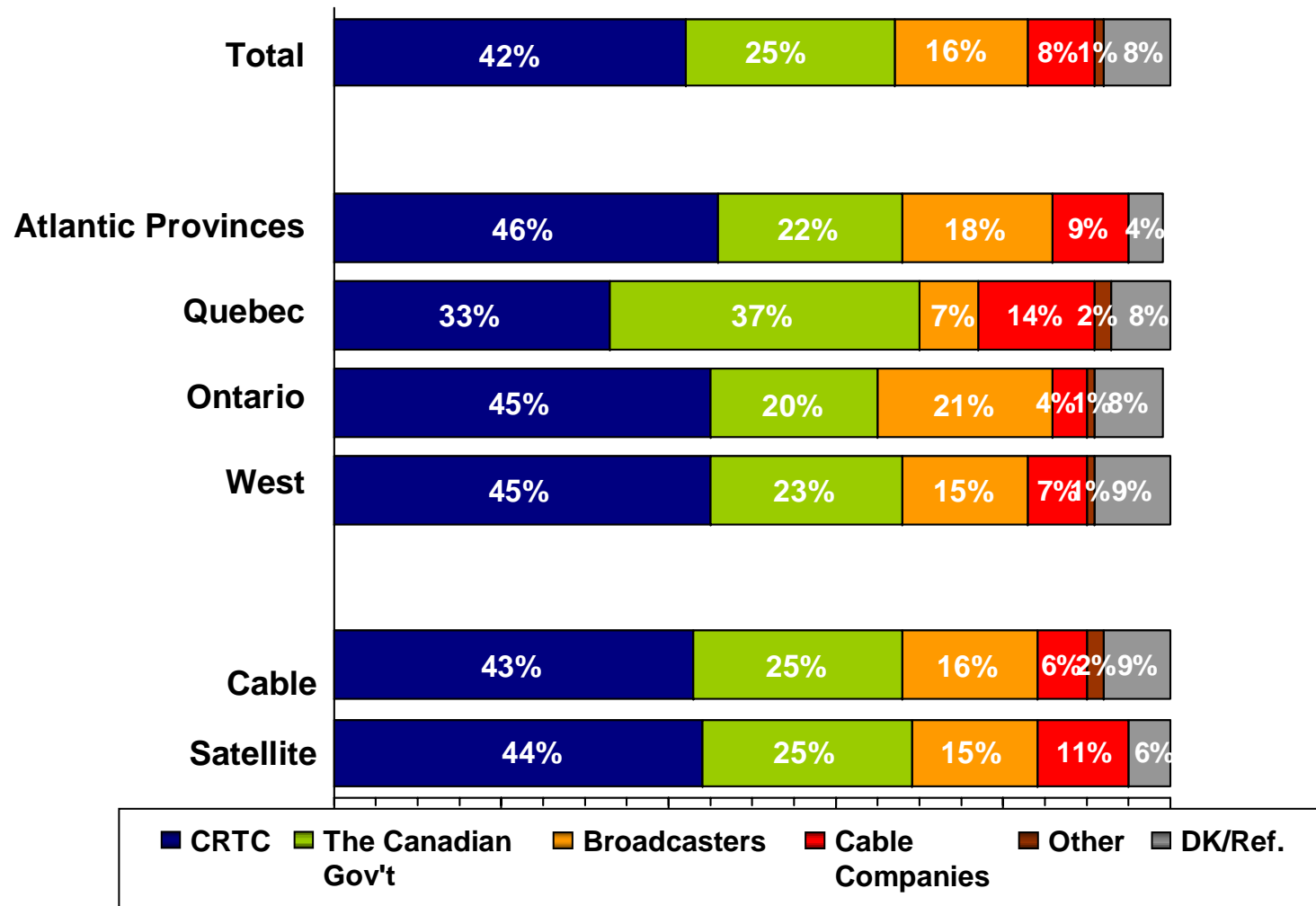


A clear majority believe the CRTC and the federal government are responsible to ensure the viability of Canadian programming. Clearly they believe that cable companies are not...



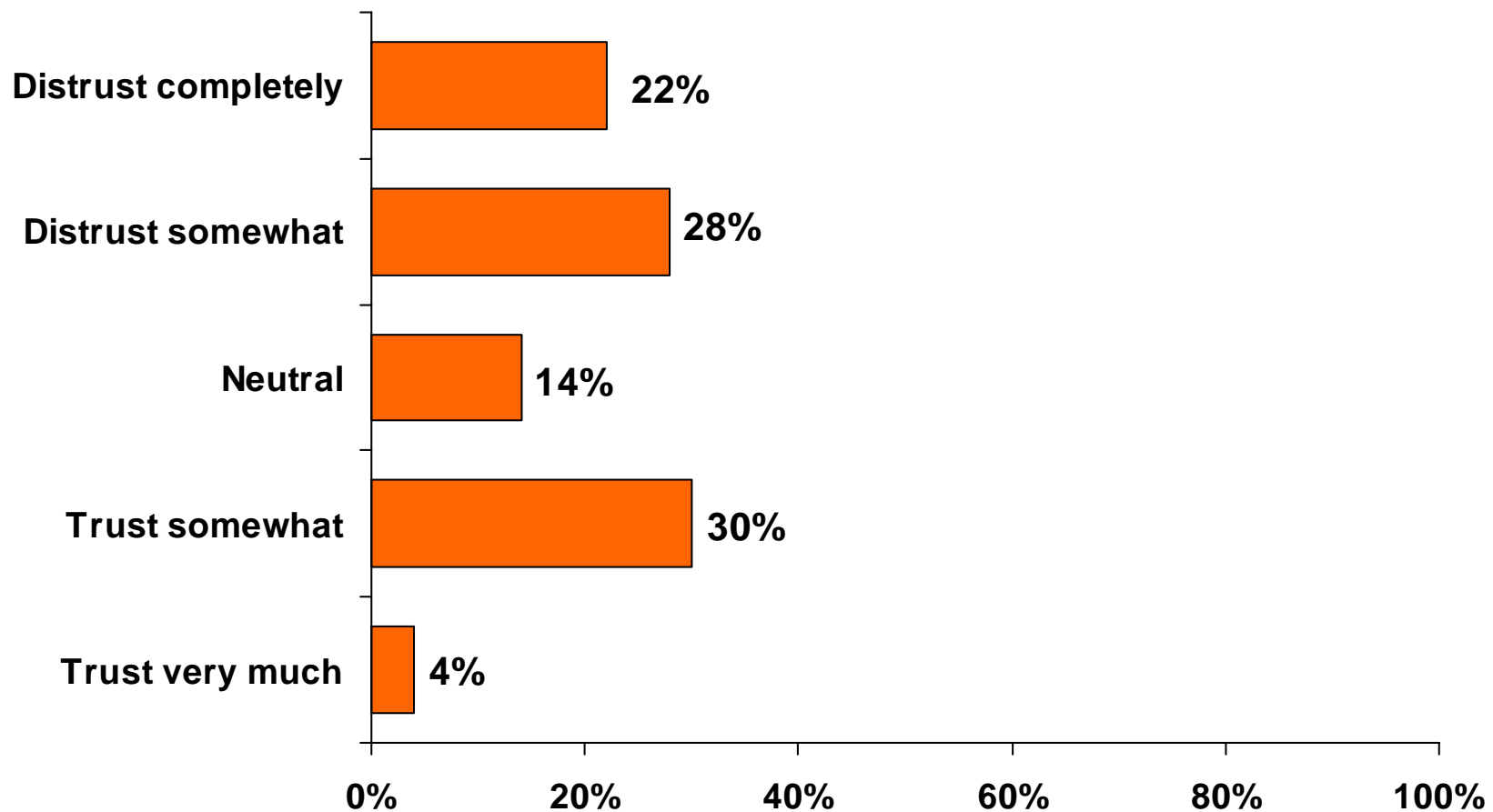
Q16. Who do you think is most responsible for ensuring the viability of Canadian programming? (ROTATE)

Except among Quebecois, Canadians trust the CRTC most to preserve Canadian content on TV. In all parts of Canada the government, in combination with the CRTC, are trusted by most people



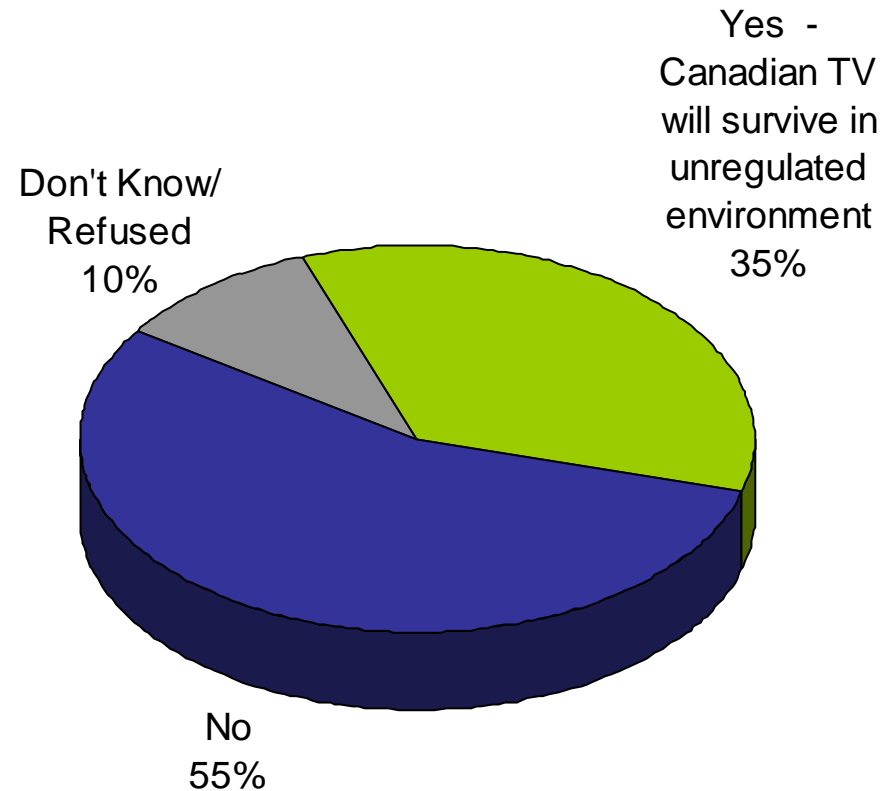
Q19. In your opinion, which one of the following organizations would you trust most to preserve Canadian culture and identity by promoting Canadian content on TV? Please select one. (ROTATE)

One half of respondents do not trust their cable/satellite providers to promote and deliver Canadian content

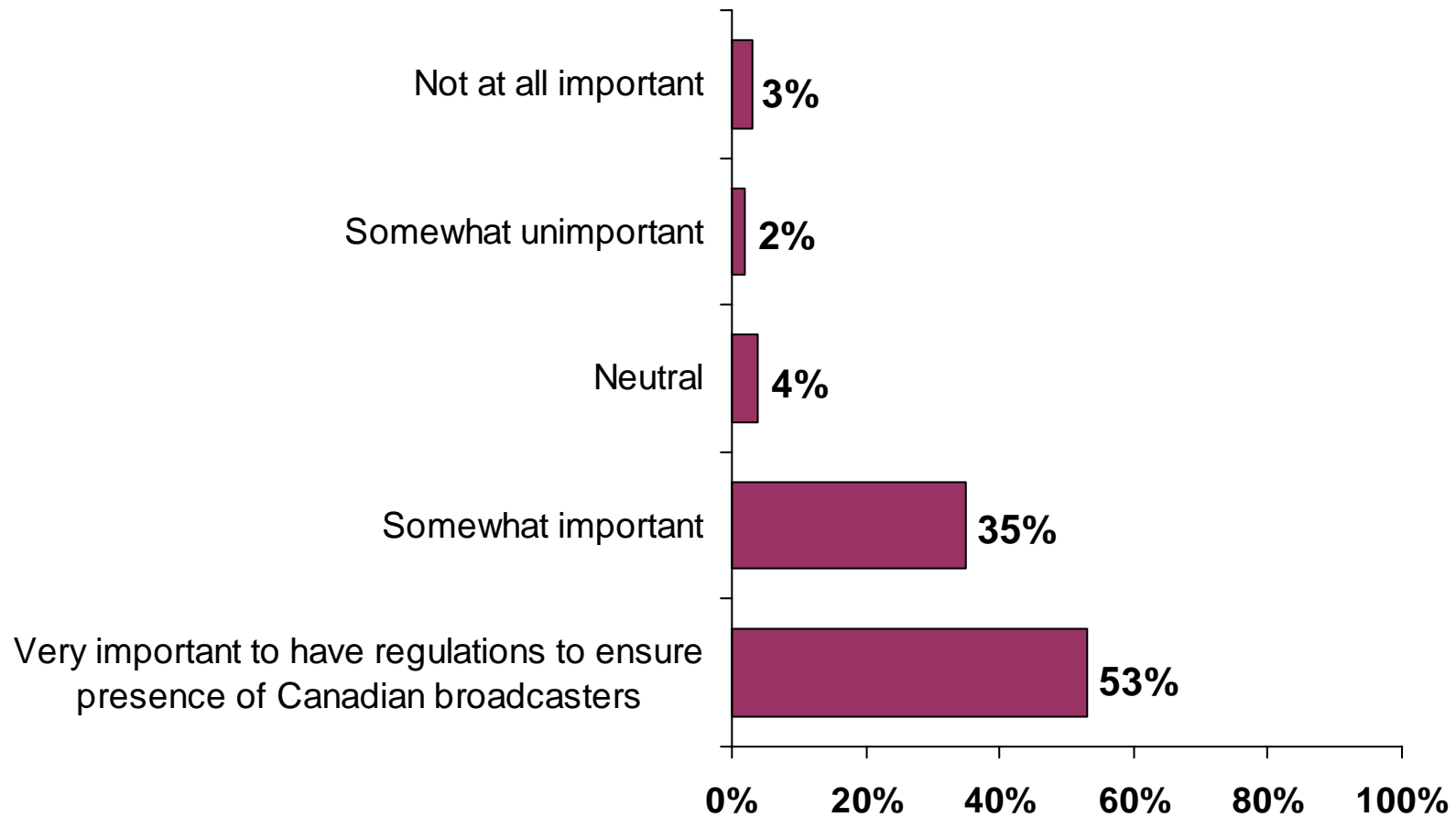


Q29. If the industry were less regulated, how much would you trust cable and satellite companies to promote and deliver Canadian channels and content?

Canadians believe that less regulation would have negative economic consequences for the Canadian television production industry

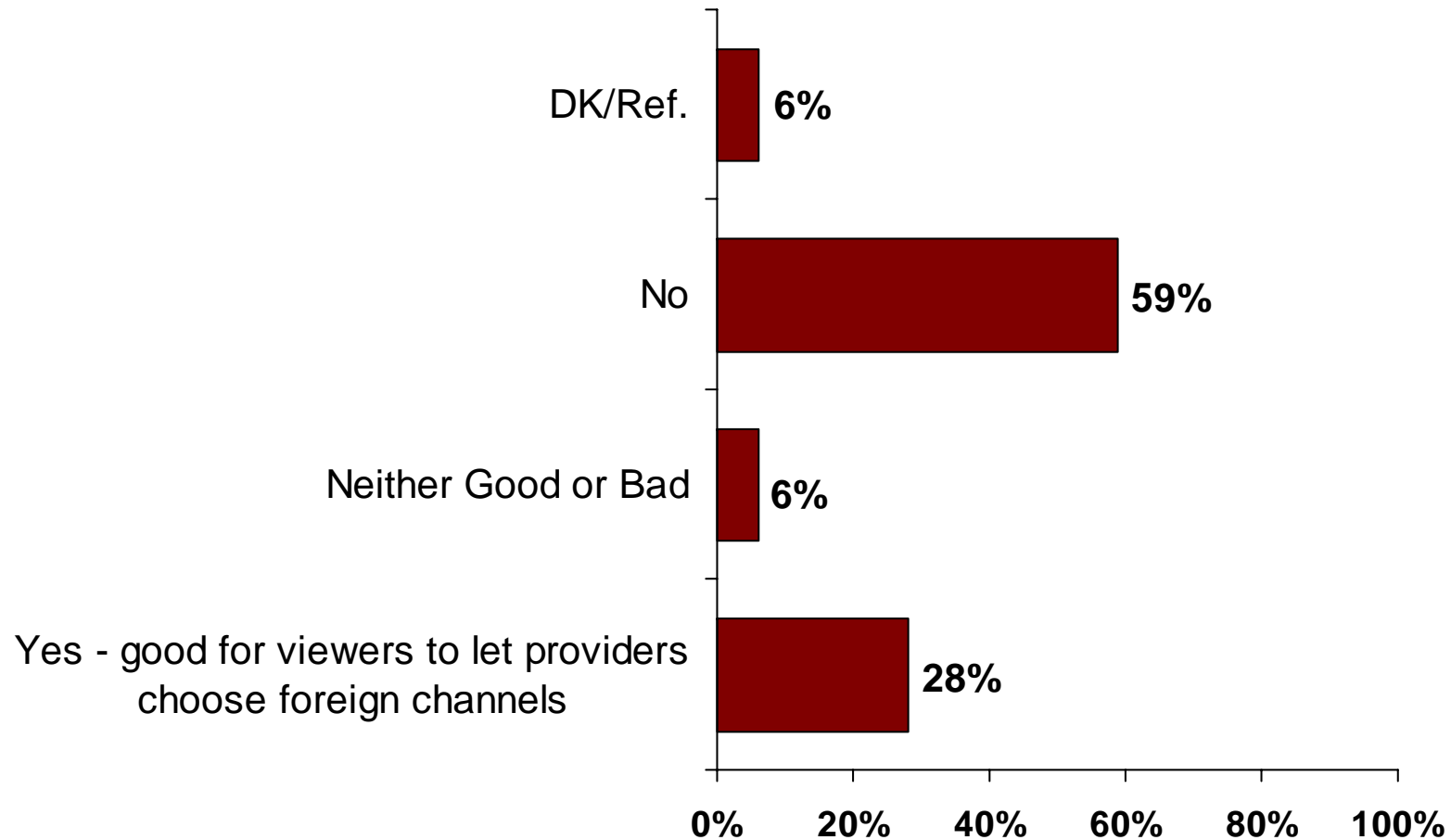


Nearly nine in ten believe that regulations are needed to preserve independent Canadian programming on TV

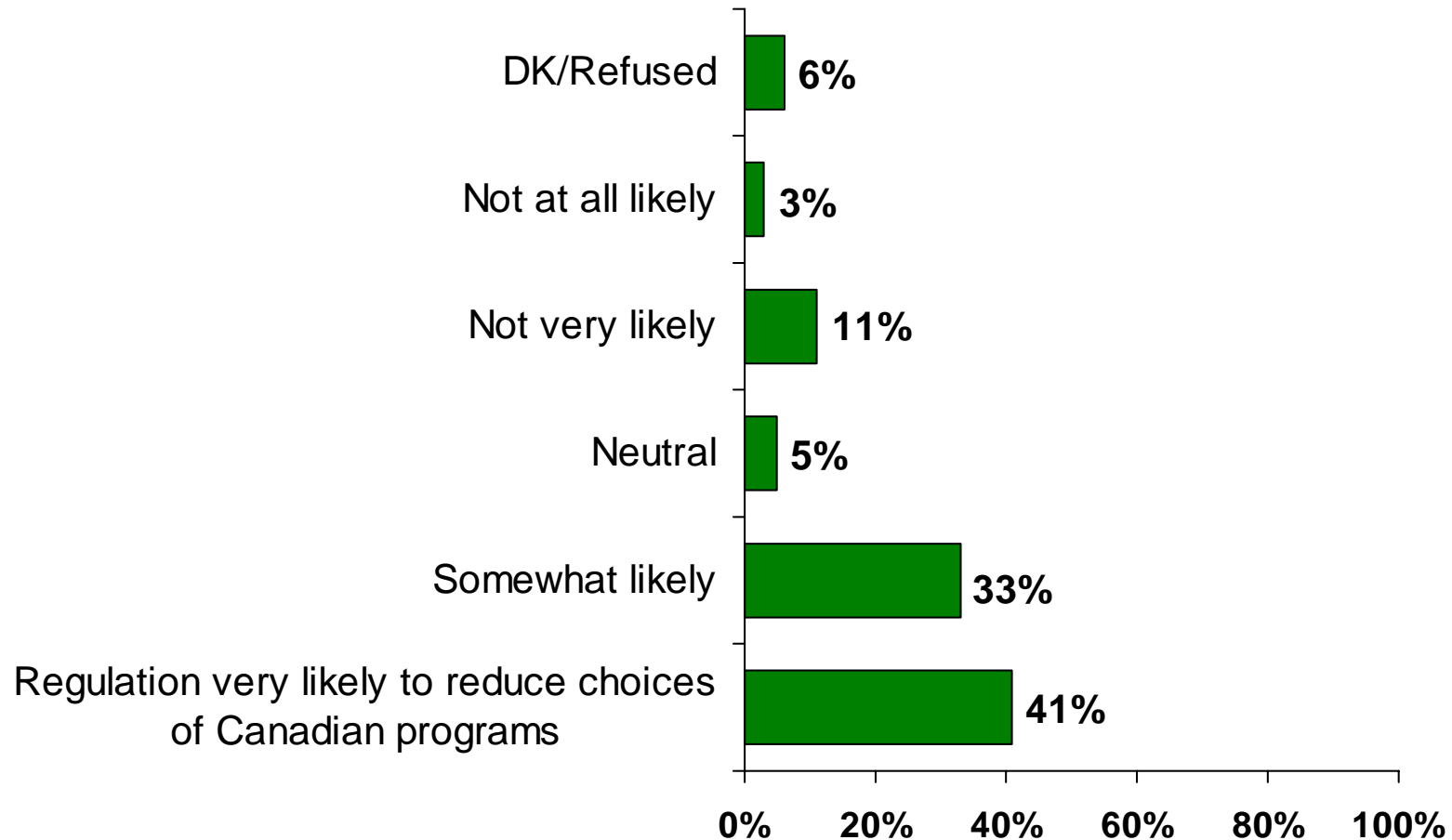


Q28. In your opinion, how important is it to have regulations and/or incentives that would ensure the continued presence of independently owned Canadian broadcasters on Canadian cable and satellite line-ups?

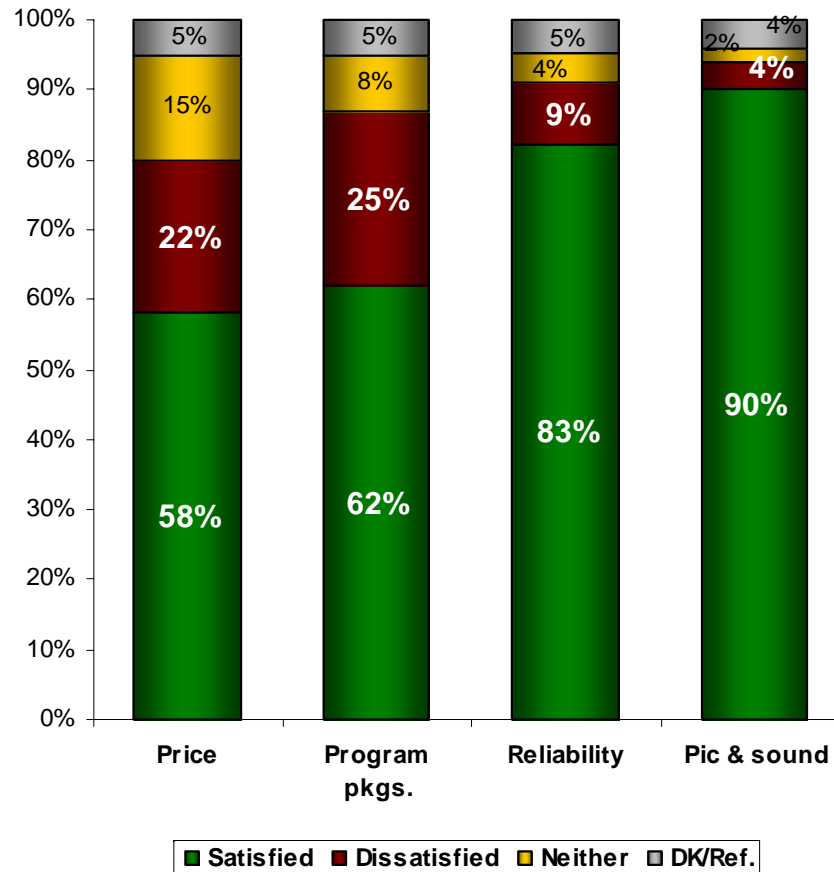
Most Canadians believe viewers and listeners interests would be hurt if cable and satellite companies were allowed to choose the channel line-up



Almost three quarters of respondents believe that less regulation is likely to have a negative impact on Canadian TV, by reducing choices of Canadian programs



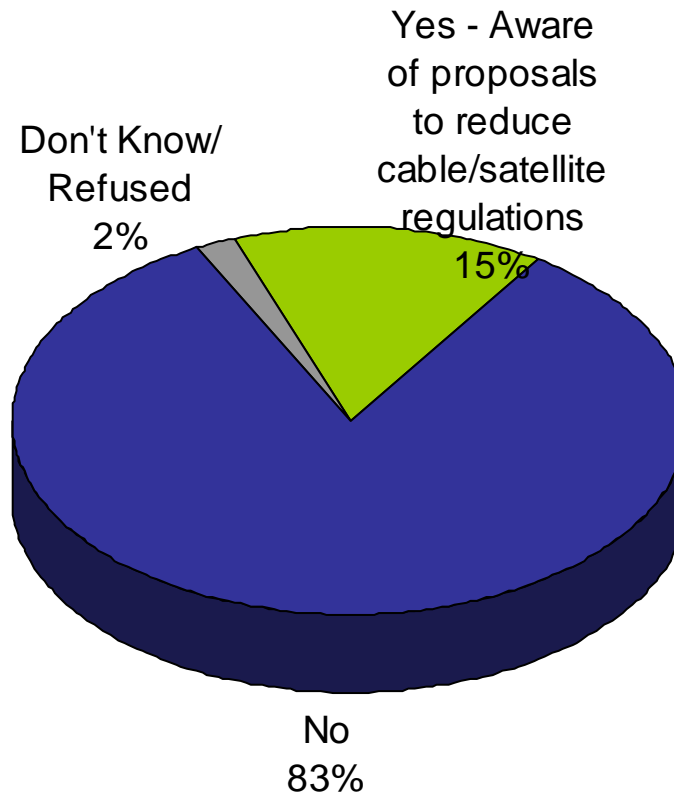
Even though Canadians do not trust cable on programming matters, customer satisfaction is high



- Q31A-D. We would now like to ask you about your cable or satellite provider. How would you rate your overall satisfaction with your cable or satellite provider on the following attributes



There is very little awareness amongst Canadians about the proposed reduction in regulation of cable and satellite services



Q23. Are you aware that the Canadian Radio-Television and Telecommunication Commission has been considering a proposal to reduce regulation of the cable/satellite services - in other words, to allow cable and satellite providers to decide which channels are offered to consumers and which are not?



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