



CAB MEMBER SURVEY SUMMARY DATA

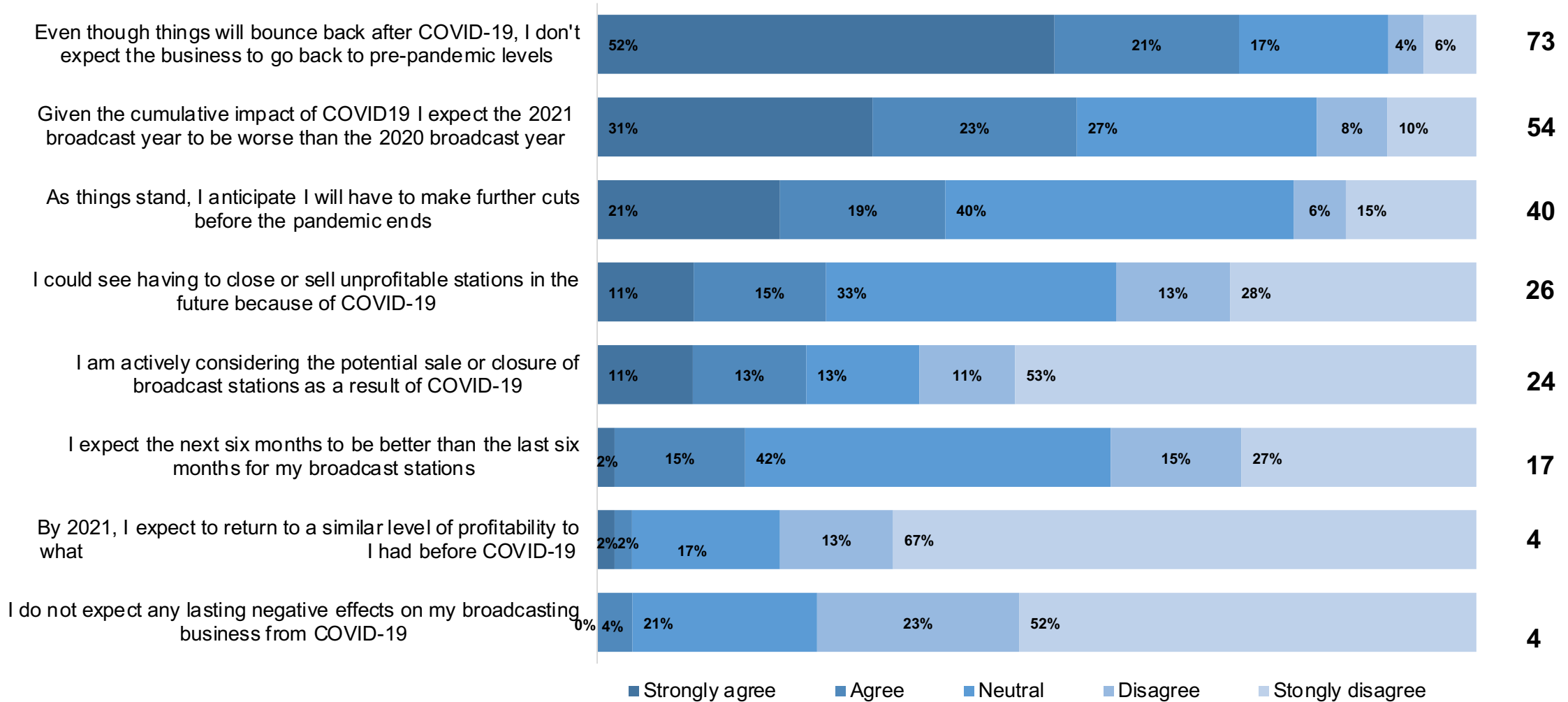
March 2021

INTRODUCTION

- CAB Survey results are based on a Questionnaire that was circulated to CAB radio members and non-members in January, 2021.
- The Questionnaire was designed with the assistance of Solutions Research Group, and modelled on a previous information template used by the CAB in its capacity as administrator of the \$22.5 million COVID-19 Emergency Relief Fund (ERF), funded by the Government of Canada.
- The survey response rate was high. 48 radio groups responded, representing 80% of commercial radio stations and 89% of commercial radio revenues. However, as data was not consistently provided for all questions, results tabulated for some questions use a smaller representative sample. (See number of respondents in each slide.)
- Radio group responses were independently aggregated and analyzed by Sylvie Bissonnette, CPA, CGA. Until her retirement in November 2020, Ms. Bissonnette was the long standing Vice-President, Finance & Administration and CFO of the CAB. Among her roles during her tenure were administrator of the CRTC created Local Programming Improvement Fund (LPIF), Small Market Local Programming Fund (SMLPF) and Independent Local News Fund (ILNF). Ms. Bissonnette continues to act as the administrator of the ILNF and ERF.

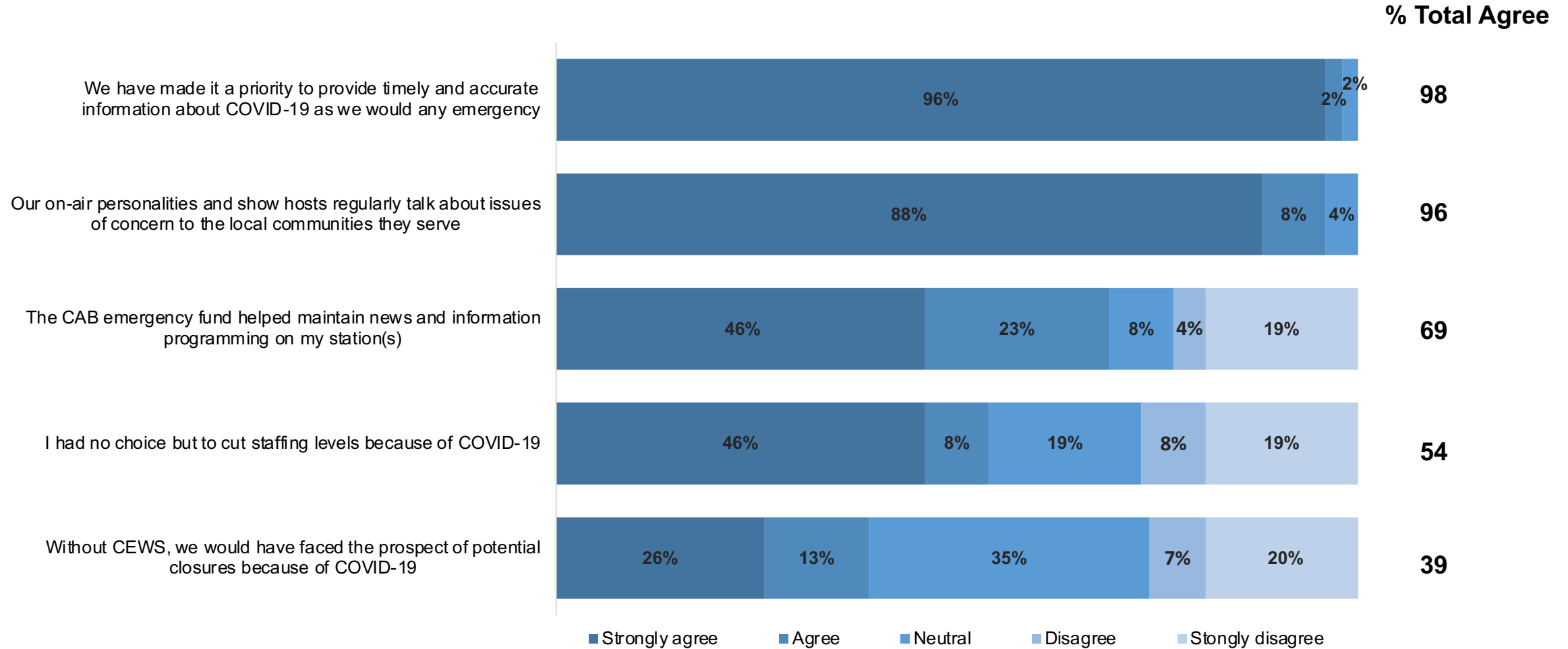
AGREEMENT/DISAGREEMENT WITH COVID-19 IMPACT ASSESSMENT STATEMENTS

% Total Agree



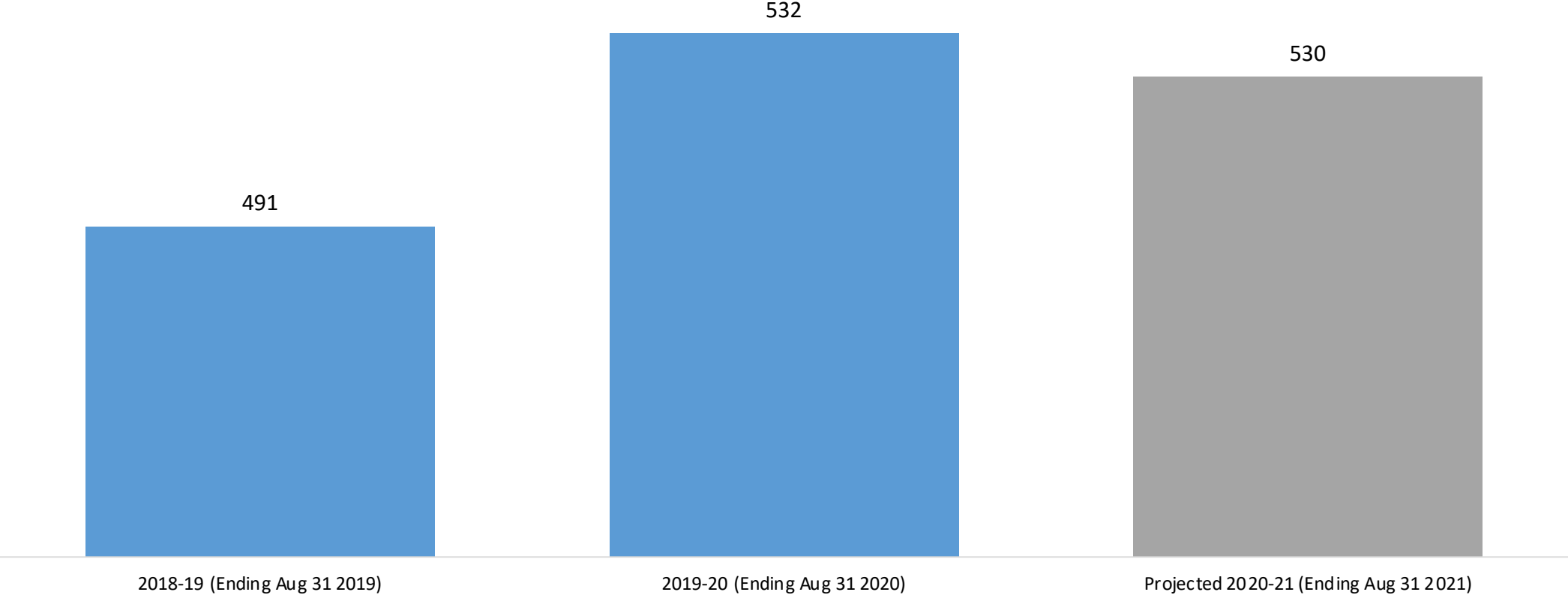
Base: All respondents (n=48); Question: Please indicate if you agree or disagree with the following statements on a scale of 1 to 5 where 1=Strongly disagree and 5=Strongly agree

OTHER AGREE/DISAGREE STATEMENTS



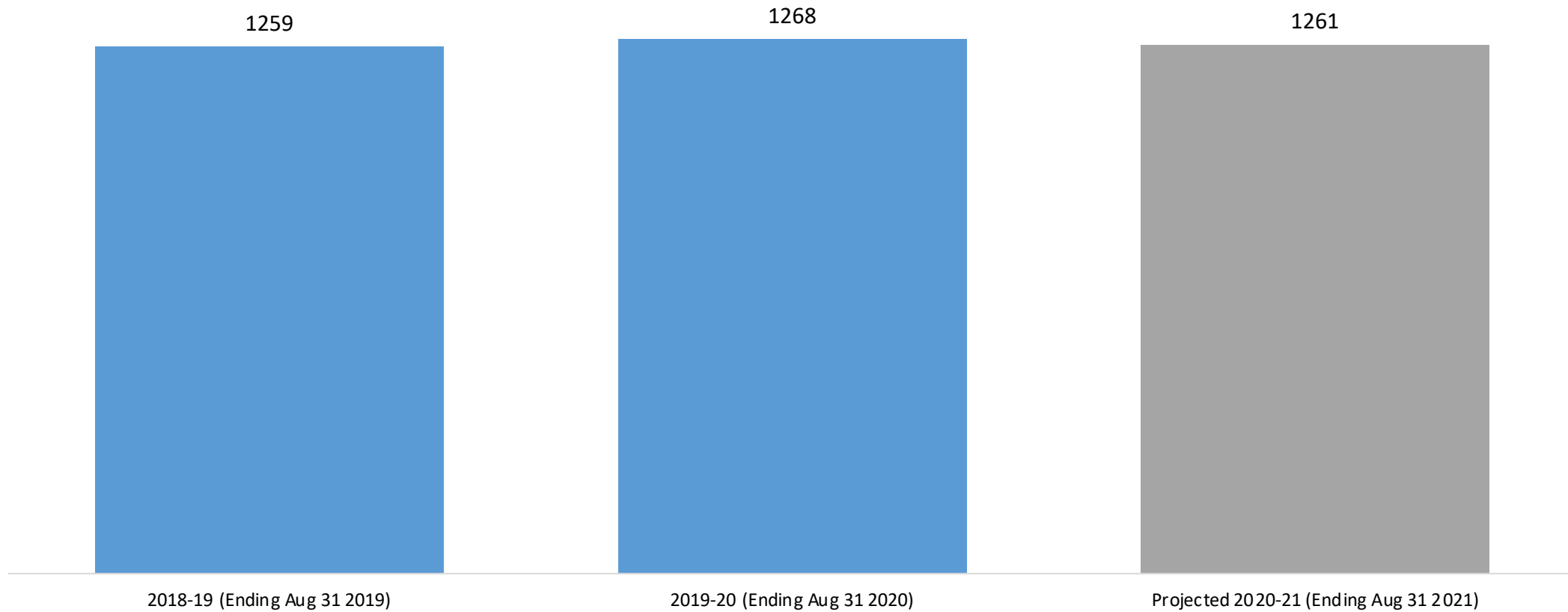
Base: All respondents (n=48); Question: *Please indicate if you agree or disagree with the following statements on a scale of 1 to 5 where 1=Strongly disagree and 5=Strongly agree*

ESTIMATED HOURS OF NEWS PROGRAMMING BROADCAST PER STATION (annual hours/station)



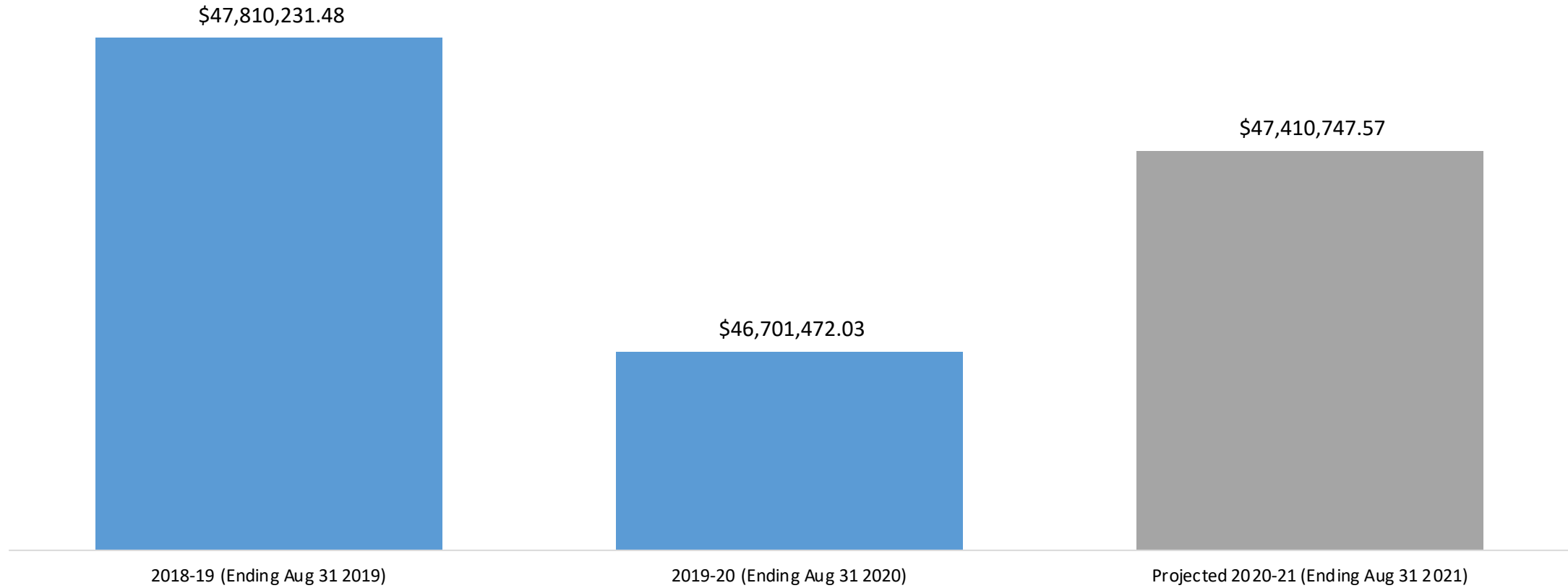
Base: All respondents (n=48); Question: *Please estimate weekly hours of News Programming broadcast per station (rounded to the nearest hour) ...*

ESTIMATED HOURS OF SPOKEN WORD PROGRAMMING BROADCAST PER STATION



Base: Majority of respondents (n=45); Question: *Please estimate weekly hours of News Programming broadcast per station (rounded to the nearest hour) ...*

TOTAL ANNUAL EXPENDITURES ON NEWS PROGRAMMING



Base: Majority of respondents (n=45); Question: *Please provide TOTAL ANNUAL expenditures on NEWS PROGRAMMING for all of your stations for the following*

TOTAL ANNUAL EXPENDITURES ON SPOKEN WORD PROGRAMMING

\$202,877,329.54



2018-19 (Ending Aug 31 2019)

\$185,607,122.05



2019-20 (Ending Aug 31 2020)

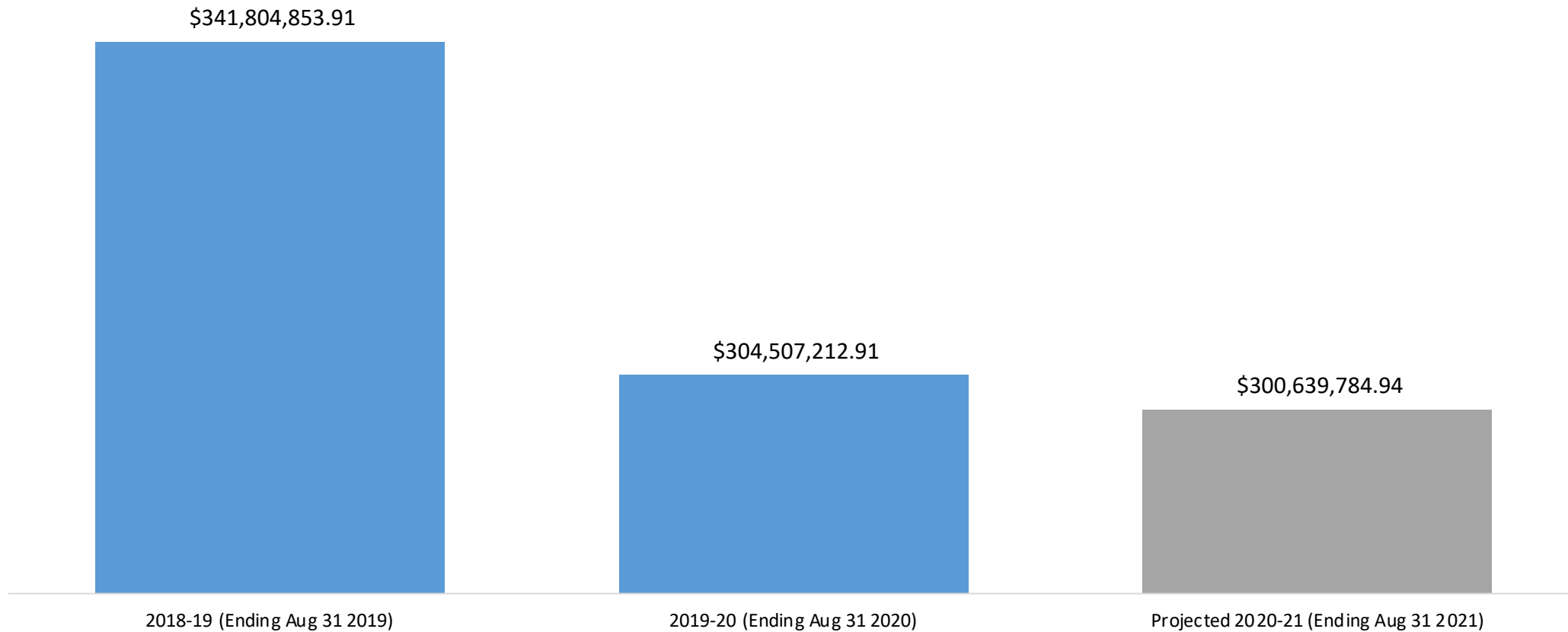
\$180,631,057.65



Projected 2020-21 (Ending Aug 31 2021)

Base: Majority of respondents respondents (n=40); Question: *Please provide TOTAL ANNUAL expenditures on SPOKEN WORK PROGRAMMING (including news programming) for all of your stations for the following*

TOTAL ANNUAL EXPENDITURES ON PROGRAMMING AND PRODUCTION



Base: Majority of respondents (n=46); Question: *Please provide TOTAL ANNUAL expenditures on PROGRAMMING AND PRODUCTION for all your stations for the following*

Appendix I – Summary of Quantitative Survey Results

CAB RADIO SURVEY 2021 - PLEASE COMPLETE AND RETURN BY CLOSE OF BUSINESS JANUARY 29, 2021

Q & Line #																			Total Respondents	
										% Change	% 2 yr Change									
1	Number of FM stations									479										
2	Number of AM stations									94										
3	Total Number of stations									573										
4	Number of French Language stations									61										
5	Number of English Language Stations									496										
6	Number of Ethnic Stations									16										
7	Total Revenues 2018-2019 (Ending Aug 31 2019)									\$ 1,294,114,235.10									47	
8	Total Revenues 2019-2020 (Ending Aug 31 2020)									\$ 975,090,723.34	-24.7%								47	
9	Estimated Revenues 2020-2021 (Ending Aug 31 2021)									*	-2.5%								46	
10	Projected Revenues 2021-2022 (Ending Aug 31 2022)									*	12.1%								45	
	* A small number of respondents did not provide estimates for 2021 or projections for 2022. The percentage changes shown for those years have been derived by comparing data only for respondents that provided data for each of the years in question. Only totals based on all respondents have been provided here, to avoid any possibility of residual disclosure.																			
	IF ONE OR MORE AM STATIONS IN Q.2 ABOVE, COMPLETE Q11-14 FOR AM STATIONS ONLY; OTHERWISE GO TO Q.15																			
11	Total AM Revenues 2018-2019 (Ending Aug 31 2019)									\$ 224,433,088.92									20	
12	Total AM Revenues 2019-2020 (Ending Aug 31 2020)									\$ 167,868,359.06									20	
13	Estimated AM Revenues 2020-2021 (Ending Aug 31 2021)									\$ 139,068,469.92									19	
14	Projected AM Revenues 2021-2022 (Ending Aug 31 2022)									\$ 153,940,550.07									18	
	Excluding the CAB Emergency Fund, please indicate the Total Amount of Assistance Received / To Be Received from...																			
15	Federal, Provincial, Territorial, Municipal Governments for 2019-2020 (Ending Aug 31 2020)									\$ 73,240,086.37									47	
16	Federal, Provincial, Territorial, Municipal Governments for 2020-2021 (Ending Aug 31 2021)									\$ 29,214,834.82									42	
17	Of the Total Amount of Assistance in 2019-2020 above in Line 15., What % was CEWS?									82%									44	
18	Of the Total Amount of Assistance in 2020-2021 above in Line 16., What % was CEWS?									70%									41	
	In the box below (Q.19), please provide examples of COVID-19 related local or regional initiative taken by your station or staff not previously provided to CAB																			
	<i>Please feel free to return a word document with the survey if more space is required.</i>																			
19																				
	Please indicate if you agree or disagree with the following statements on a scale of 1 to 5 where 1=Strongly Disagree and 5=Strongly Agree																			
										Enter a Number from 1 to 5 Where 1=Strongly Disagree, 3 is Neutral and 5=Strongly Agree										
										1	2	3	4	5	TOTAL					
20	I expect the next six months to be better than the last six months for my broadcast stations									13	7	20	7	1	48					
21	Given the cumulative impact of COVID19 I expect the 2021 broadcast year to be worse than the 2020 broadcast year									5	4	13	11	15	48					
22	I do not expect any lasting negative effects on my broadcasting business from COVID-19									25	11	10	2		48					
23	By 2021, I expect to return to a similar level of profitability to what I had before COVID-19									32	6	8	1	1	48					
24	I had no choice but to cut staffing levels because of COVID-19									9	4	9	4	22	48					
25	Without CEWS, we would have faced the prospect of potential closures because of COVID-19									9	3	16	6	12	46					
26	The CAB emergency fund helped maintain news and information programming on my station(s)									9	2	4	11	22	48					
27	As things stand, I anticipate I will have to make further cuts before the pandemic ends									7	3	19	9	10	48					
28	I could see having to close or sell unprofitable stations in the future because of COVID-19									13	6	15	7	5	46					
29	I am actively considering the potential sale or closure of broadcast stations as a result of COVID-19									25	5	6	6	5	47					
30	Even though things will bounce back after COVID-19, I don't expect the business to go back to pre-pandemic levels									3	2	8	10	25	48					
31	Our on-air personalities and show hosts regularly talk about issues of concern to the local communities they serve											2	4	42	48					
32	We have made it a priority to provide timely and accurate information about COVID-19 as we would any emergency											1	1	44	46					

	Please estimate <u>weekly</u> hours of News Programming broadcast <u>per</u> station (rounded to the nearest hour)							
33			2018-19 (Ending Aug 31 2019)	491				48
34			2019-20 (Ending Aug 31 2020)	532	8.4%			48
35			Projected 2020-21 (Ending Aug 31 2021)	530	-0.4%	7.9%		48
36	Of the weekly hours of News Programming in Line 34. and 35., how many were produced as a result of receiving funding from the CAB Emergency Fund?			136				42
	Please estimate <u>weekly</u> hours of <u>Spoken Word</u> Programming (including News Programming) broadcast <u>per</u> station (rounded to the nearest hour)							
37			2018-19 (Ending Aug 31 2019)	1259				45
38			2019-20 (Ending Aug 31 2020)	1268	0.7%			45
39			Projected 2020-21 (Ending Aug 31 2021)	1261	-0.6%	0.2%		45
40	Of the weekly hours of Spoken Word Programming in Line 38. and 39., how many were produced as a result of receiving funding from the CAB Emergency Fund?			187				41
	Please provide TOTAL ANNUAL expenditures on NEWS PROGRAMMING for all of your stations for the following							
41			2018-19 (Ending Aug 31 2019)	\$ 47,810,231.48				45
42			2019-20 (Ending Aug 31 2020)	\$ 46,701,472.03	-2.3%			45
43			Projected 2020-21 (Ending Aug 31 2021)	\$ 47,410,747.57	1.5%	-0.8%		45
	Please provide TOTAL ANNUAL expenditures on SPOKEN WORD PROGRAMMING (including news programming) for all of your stations for the following							
44			2018-19 (Ending Aug 31 2019)	\$ 202,877,329.54				40
45			2019-20 (Ending Aug 31 2020)	\$ 185,607,122.05	-8.5%			40
46			Projected 2020-21 (Ending Aug 31 2021)	\$ 180,631,057.65	-2.7%	-11.0%		40
	Please provide TOTAL ANNUAL expenditures on PROGRAMMING AND PRODUCTION for all your stations							
47			2018-19 (Ending Aug 31 2019)	\$ 341,804,853.91				46
48			2019-20 (Ending Aug 31 2020)	\$ 304,507,212.91	-10.9%			46
49			Projected 2020-21 (Ending Aug 31 2021)	\$ 300,639,784.94	-1.3%	-12.0%		46
	Please provide the following data as at January 1, 2021 for all your stations combined							
50	Number of full time equivalent employees (FTEs)			5409				47
51	Total ANNUAL remuneration (salaries and wages)			\$ 416,952,037.76				47
52	Of the weekly hours of News Programming in Line 35., what percentage do you estimate would be comprised of <u>regularly scheduled</u> newscasts? (%)			75%				47
53	On average, how many regularly newscasts scheduled do you schedule per day on your music-based stations?			12				44
54	Of the weekly hours of Spoken Word in line 39., what percentage do you estimate would be devoted to news and information programming? (%)			47%				43
55	Of the weekly hours of Spoken Word in Line 39., what percentage do you estimate would be devoted to COVID -19 related news and information? (%)			22%				42
56	Estimated annual monetary contribution to local causes (airplay value plus triggered contributions)			\$ 190,855,849.74				40

THANK YOU FOR YOUR TIME

Appendix II – Private Radio stations' roles as essential news and information portals & community partners throughout the pandemic

Private radio through the pandemic

The following are just some illustrations of what private radio broadcasters have done and, as appropriate, continue to do to serve their communities since COVID-19 hit Canada. We have not attempted to identify every private broadcaster's activities in given categories, but rather provide *representative examples*.

- Increased news and information coverage through **new shows, news bulletins, alerts and commentary**. COVID-19 continues to dominate news coverage, often being the subject of special news bulletins and the lead story in regularly scheduled news and other information programming.
 - For virtually all private radio stations, this effort is reflected on-air and on-line, with broadcasters having searchable or designated COVID news pages with the latest information, specifically reflecting and targeting the communities they serve.

<https://www.ckbw.ca/covid-19-updates/>

<https://cochranenow.com/features/covid-19> <https://www.680news.com/topic/coronavirus/>

<https://www.mycoastnow.com/?s=covid>

<https://lake88.ca/2020/09/24/local-covid-19-information-testing/>

<https://www.fm1069.ca/recherche?query=covid>

<https://inquinte.ca/category/covid-19-stories>

<https://www.iheartradio.ca/energie/energie-estrie/recherche-local-7.15196254?searchField=covid>

<https://www.mycoastnow.com/?s=covid>

<https://www.myyellowknifenow.com/?s=covid>

Private radio through the pandemic

- Pre-empting of regularly scheduled programming to **provide live coverage of daily Federal, Provincial and/or Municipal COVID-19 briefings or updates**, particularly, early on in the pandemic.
 - All-news radio stations, and many local radio broadcasters in markets without all-news stations continue to do this on major updates
- **Curating COVID-19 content, including best practices or FAQs.** With so much information available, many broadcasters have compiled lists of, and links to the most topical COVID-19 information, often featuring local health officials. As the most trusted, and most consumed local news media in their respective markets, private broadcasters make a point of dispelling myths and dangerous falsehoods by featuring stories that provide the most current and respected health advice.
- Local business support initiatives like **helping local businesses and residents find each other.** Many broadcasters have offered local businesses advertising at a free or discounted rate and/or promoted them in various ways. Some private broadcasters have specifically targeted informational resources to local business, from webinars about working at home to information on COVID relief programs.
 - Stingray's \$20 million cross Canada local business *Stingray Stimulus Program* <https://stingraystimulus.com/>
 - Pattison Broadcasting's *Things that are Open* portal <https://chatnewstoday.ca/2020/04/14/things-that-are-open/>
 - Golden West's local business webinars and other resources <https://goldenwest.ca/business-resources/>

Private radio through the pandemic

- **PSAs on health, safety, 'stay at home' and inspiration.** All private broadcasters have aired self-produced or third party PSAs about COVID-19, and run various other campaigns under uniting slogans. Many PSAs are informational (keep 2 metres apart; wear a mask when indoors etc., typically provided by provincial governments), but many efforts are motivational. Private radio stations also routinely air shout-outs and pieces hailing front-line workers.
 - Bell Media's *We're all in this Together* campaigns
<https://www.iheartradio.ca/chum/contests/we-re-all-in-this-together-1.11228884>
 - Corus's *Canada Together* campaign
<https://www.corusent.com/news/united-now-more-than-ever-with-canadatogogether/>
- **Support for people in need.** Charities have been never more important, and also some of the hardest hit institutions through the pandemic. Always supporters of local charities, private broadcasters have redoubled their efforts during COVID-19.
 - Dougall Media's Community Response Fund <https://globalthunderbay.tbtv.com/> in support of the United Way, Thunder Bay
 - Rawlco's *Day of Caring* fundraiser in support of Saskatoon and Regina Food Banks
- **Support and airing of fundraising concerts.** Live music is perhaps matched only by live sport in how it inspires and brings people together. COVID-19 has suspended the traditional live music scene, but private broadcasters have still found ways to create and air live music events, national and local, to promote Canadian music talent, entertain Canadians and support important causes.
 - Bell, Corus and Rogers joining forces with CBC to lead *One World: Together At Home on Sunday April 26, 2020*, in support of [Food Banks Canada](#)

Private radio through the pandemic

- **Basic Information on living with COVID.** It's not just about health effects and warnings; stories by Canadians for Canadians about adjusting to life during the pandemic, from getting exercise to working from home, are why Canadian media and especially private broadcasters play such a crucial role.
- **Entertainment, comfort and good company.** Canadians stuck at home have needed fun and distraction more than ever. Private radio programmers have combined their skills, imagination, and new live production techniques to entertain Canadians in both new and old ways
 - On air, at home. Local private broadcaster hosts, announcers, and news reporters have like many Canadians been working from home, when and if at all possible.