



Canada This Month

Rogers and Shaw

Public Opinion Research
Release Date: March 31, 2021
Field Dates: March 18, 2021 to March 30, 2021

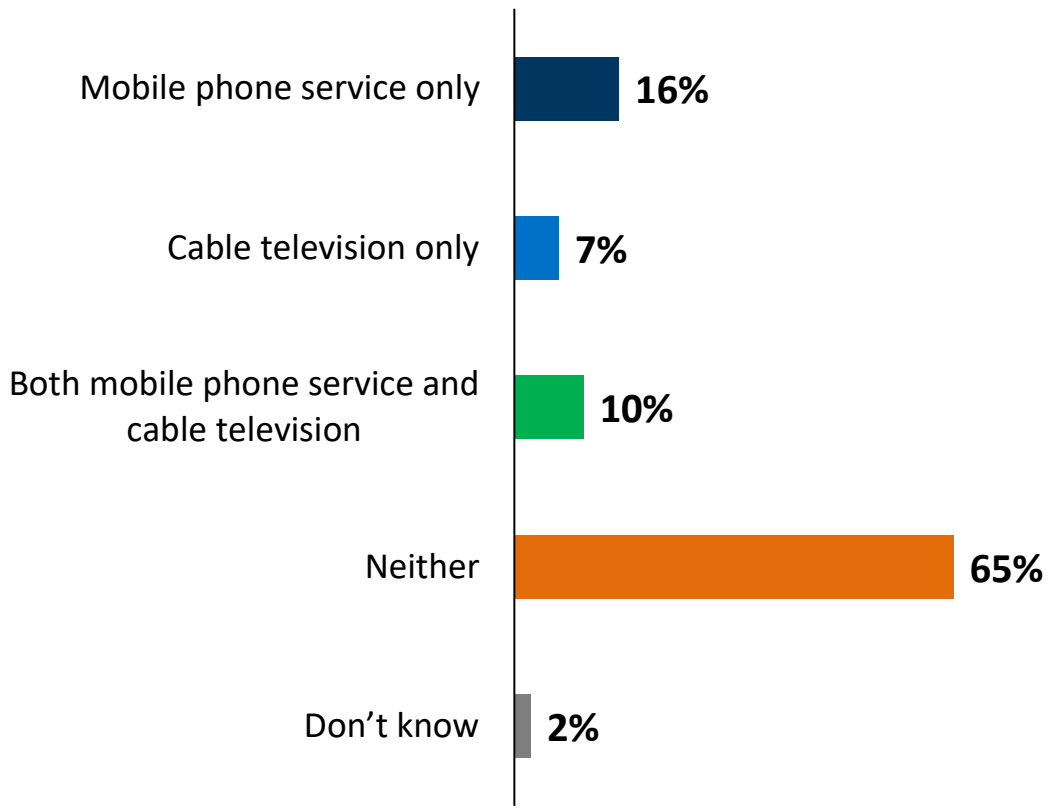
Rogers and Shaw Merger

While attention to the potential merger between Rogers and Shaw is low, the majority of those with an opinion oppose the merge and do not support the federal government approving it. Nearly half of Canadians say that the merger would likely result in them paying more for their telephone and cable services.

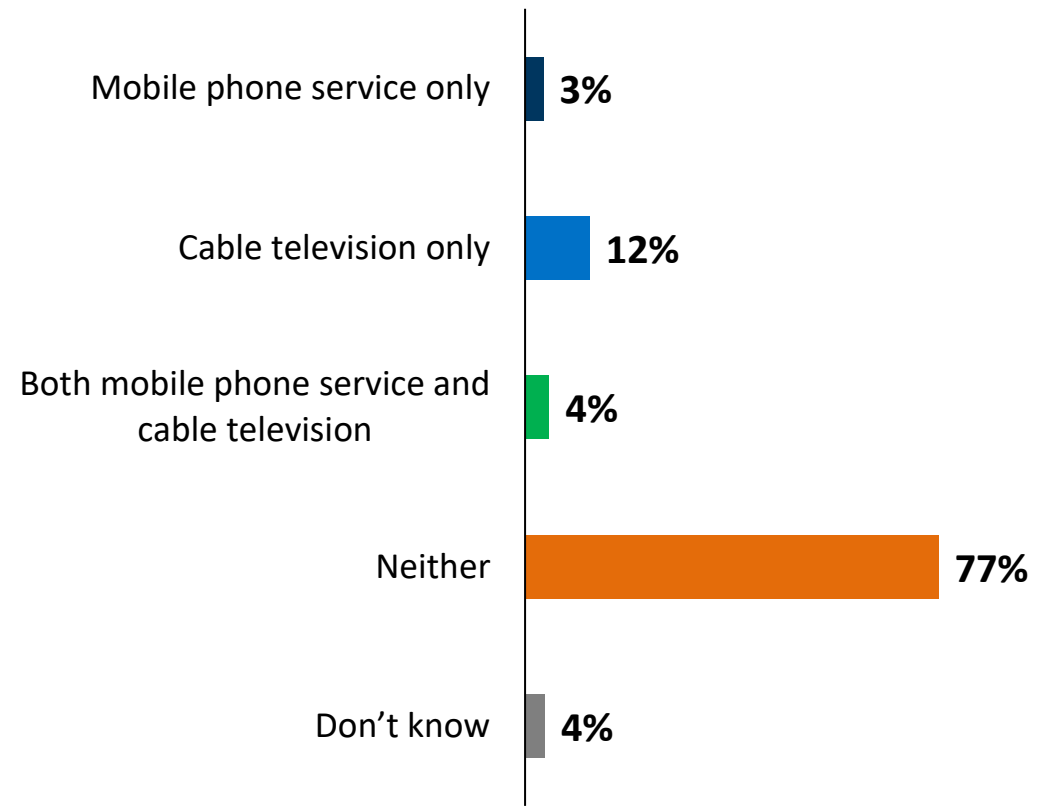
Services: One-in-three Canadians say they get some form of services from Rogers and 19% say they get services from Shaw



Which of the following services do you receive from Rogers Communications?
[asked of all respondents; n=1,000]



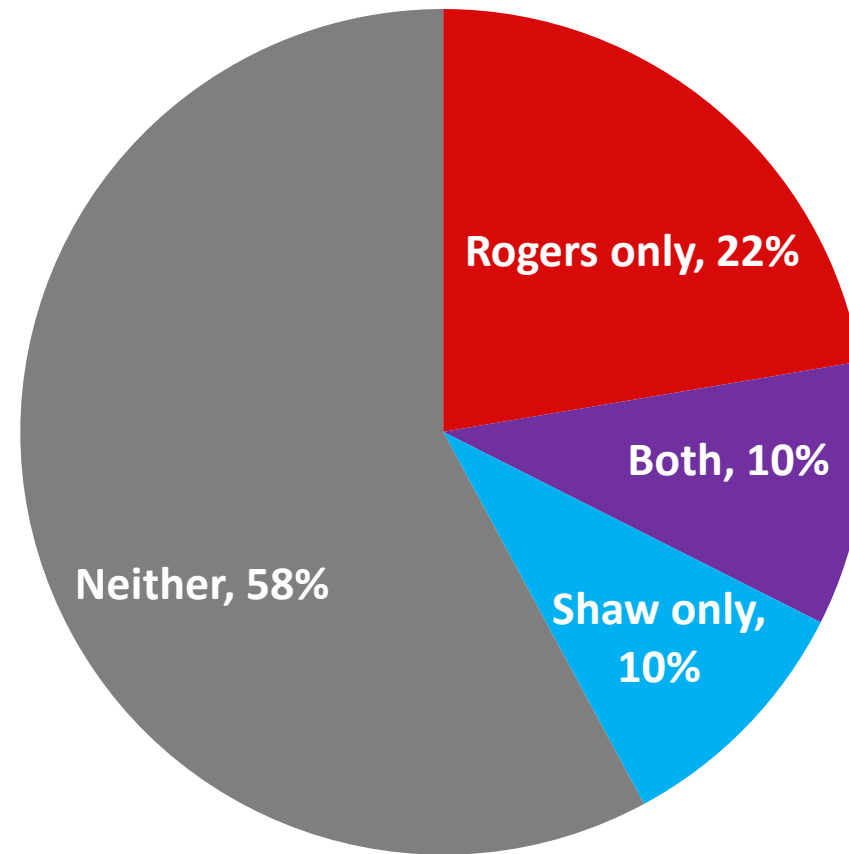
And which of the following services do you receive from Shaw Communications?
[asked of all respondents; n=1,000]



Customer Segmentation: Just over 4-in-10 Canadians say they are either Shaw or Rogers customers

Customer segmentation segmentation: Which of the following services do you receive from Rogers Communications? AND And which of the following services do you receive from Shaw Communications?

[asked of all respondents; n=1,000]

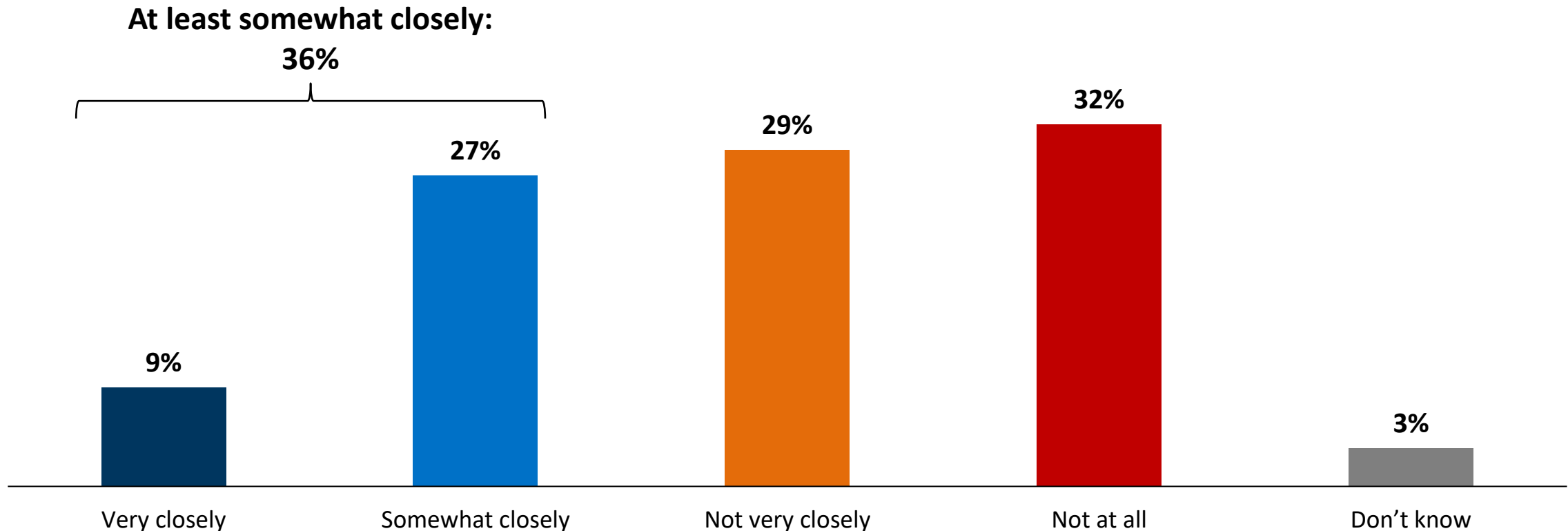


Attention: Just over 1-in-3 respondents (36%) say they are following news of the merger at least somewhat closely



Rogers Communications signed a deal to buy Shaw Communications for \$26 billion, a deal which would combine Canada's two largest cable providers together and bring together their wireless networks. How closely have you been following news about the potential merger of Rogers and Shaw?

[asked of all respondents; n=1,000]

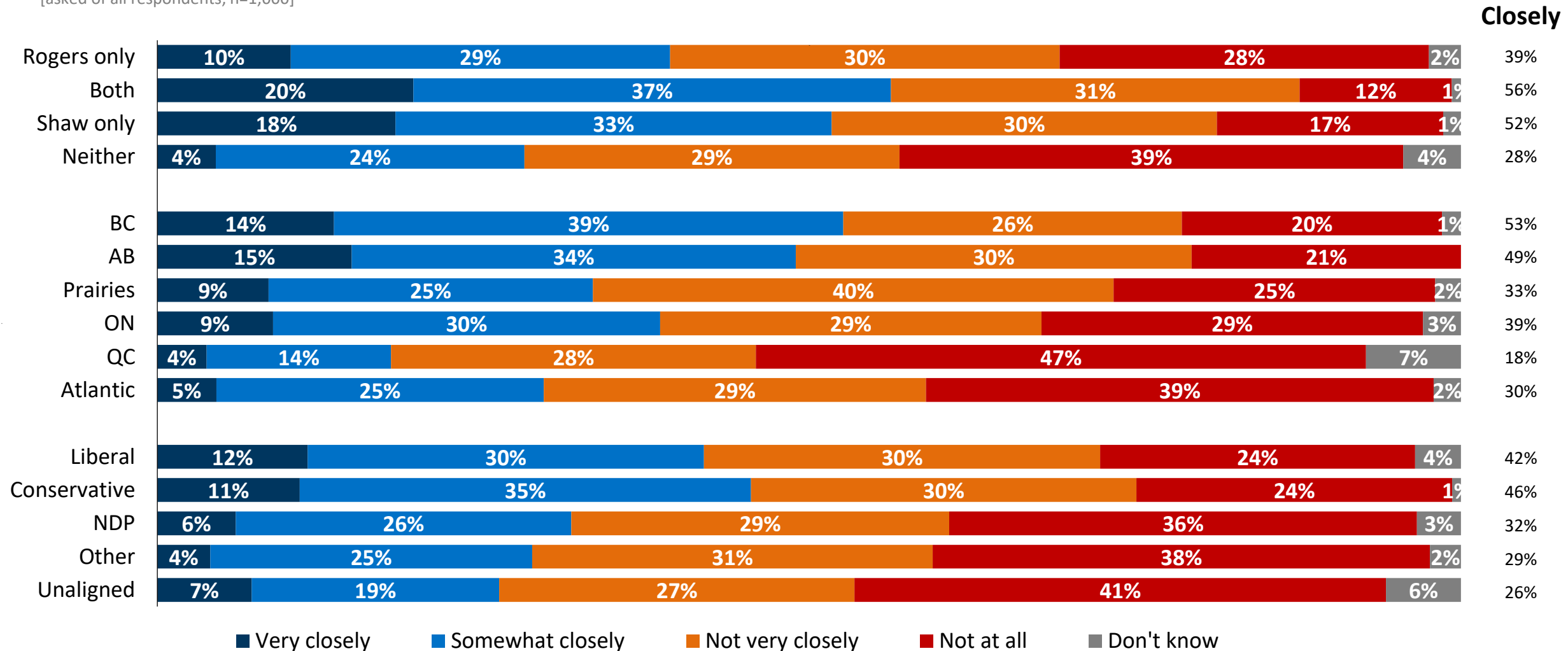


Attention: Attention is highest in BC and Alberta; lowest in Quebec and among Canadians who are neither Rogers nor Shaw customers



Rogers Communications signed a deal to buy Shaw Communications for \$26 billion, a deal which would combine Canada's two largest cable providers together and bring together their wireless networks. How closely have you been following news about the potential merger of Rogers and Shaw?

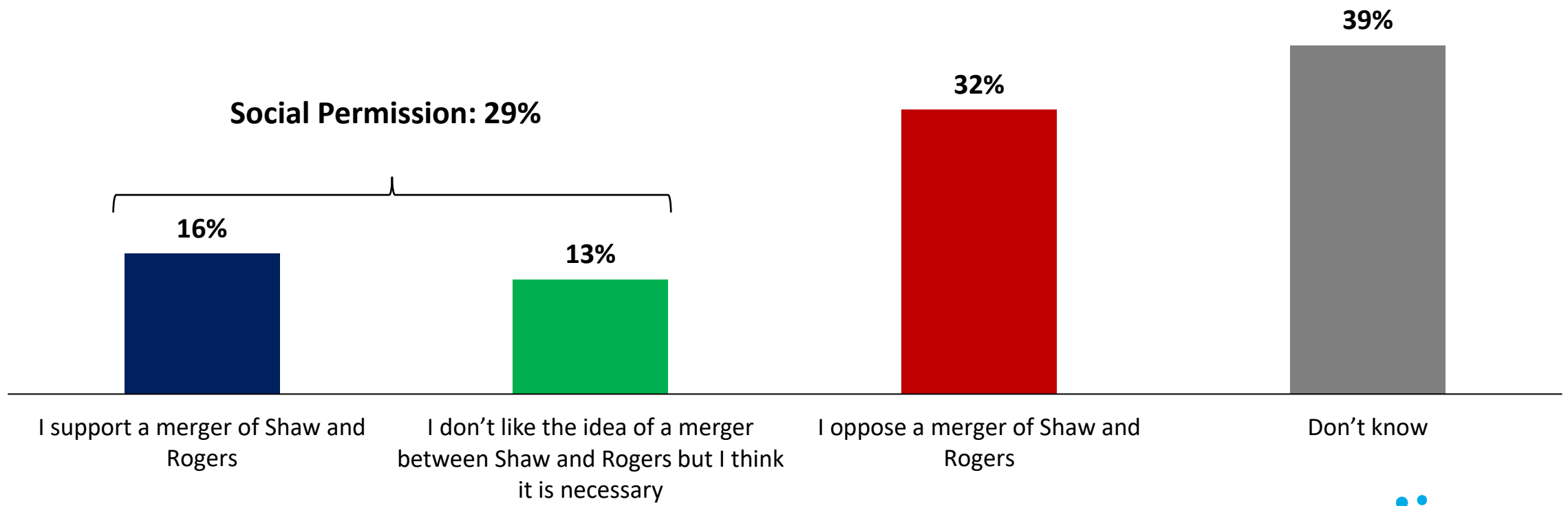
[asked of all respondents; n=1,000]



Social Permission: Only 29% of Canadians give social permission for the merger while 32% are opposed to it

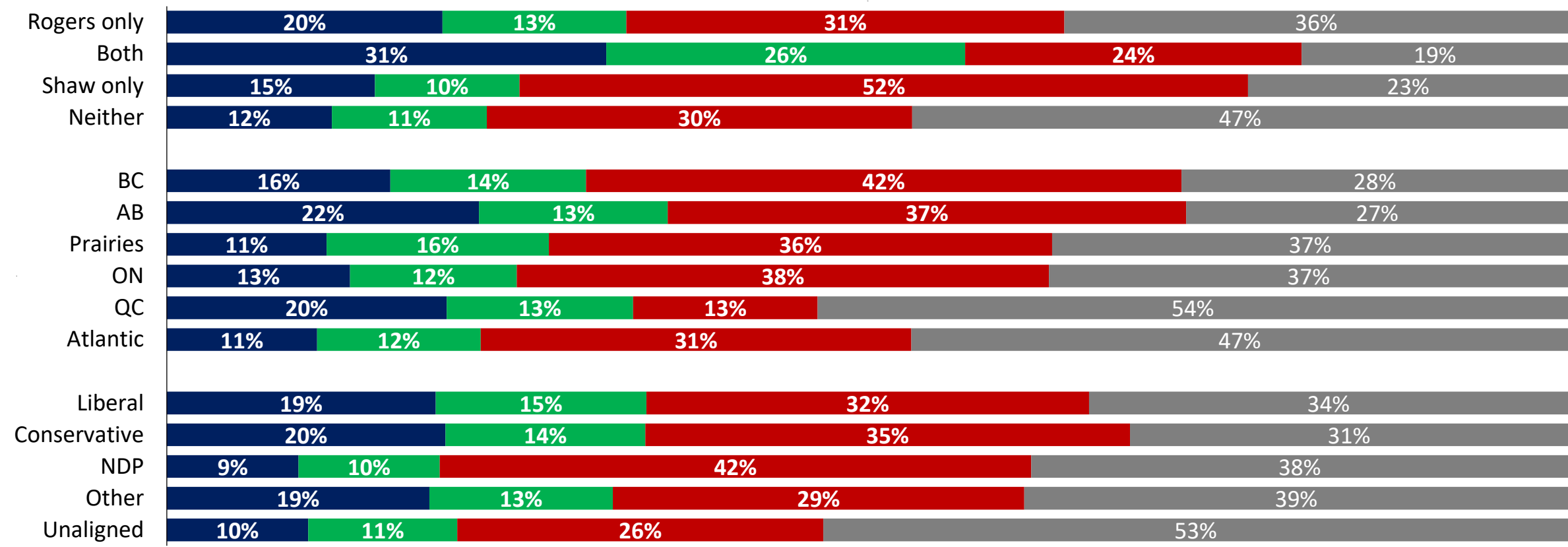


Which of the following comes closest to your point of view?
[asked of all respondents; n=1,000]



Social Permission: Half of Canadians who are only Shaw customers say they oppose a merger (52%) ⁸

Q Which of the following comes closest to your point of view?
[asked of all respondents; n=1,000]



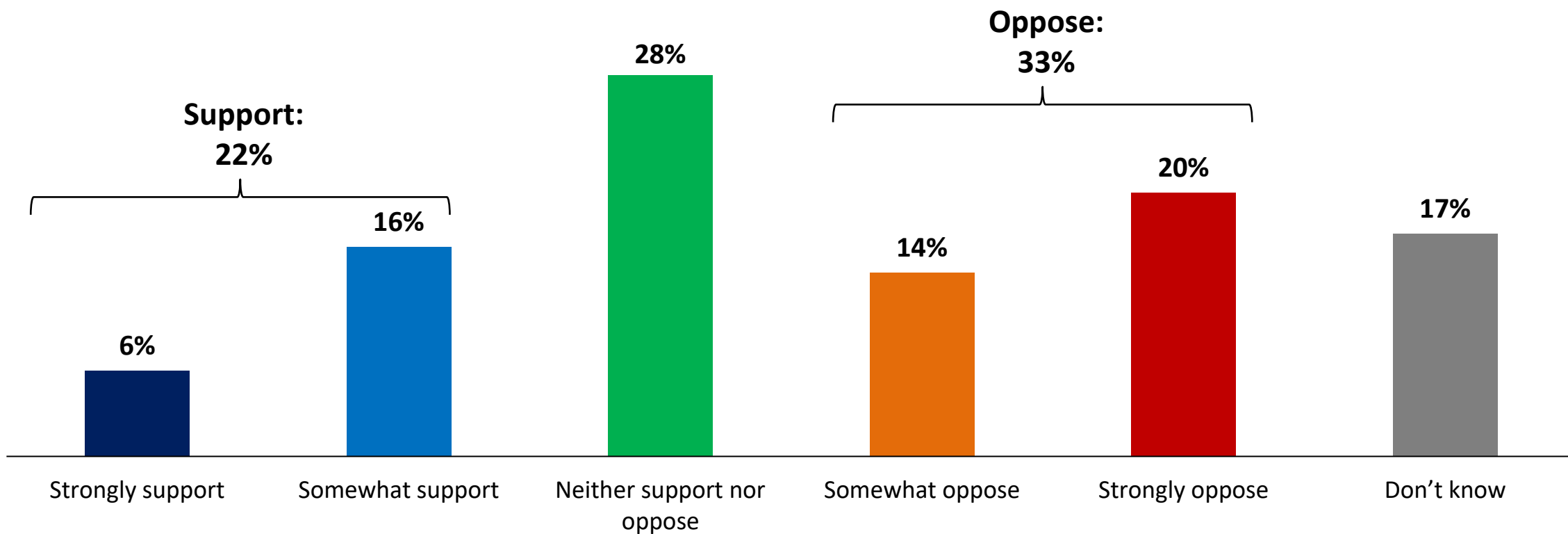
- I support a merger of Shaw and Rogers
- I don't like the idea of a merger between Shaw and Rogers but I think it is necessary
- I oppose a merger of Shaw and Rogers
- Don't know

Political Approval: Only 22% would support the federal government approving the merger while 33% would oppose it



A merge of this size has to go through various political reviews before it is finalized. Would you support or oppose the federal government approving the merger?

[asked of all respondents; n=1,000]

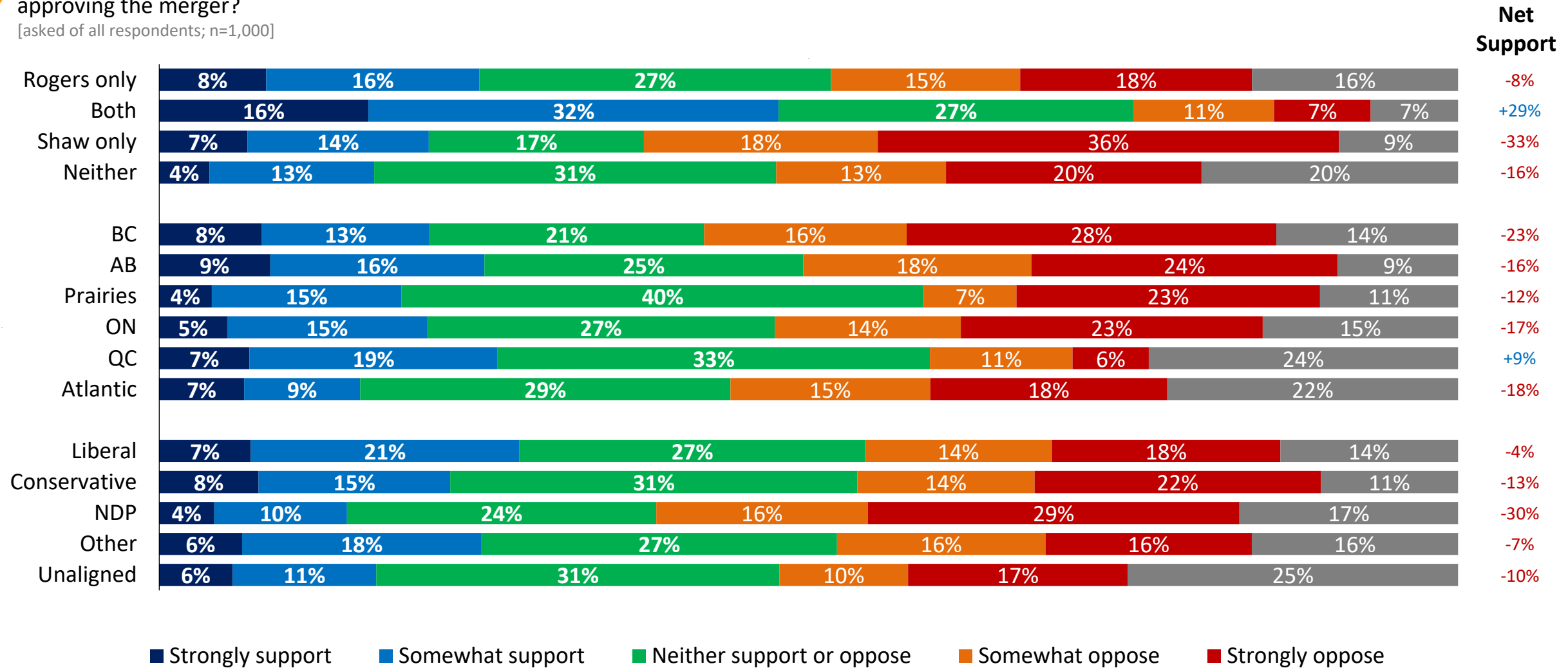


Political Approval: Net support is lowest among NDP partisans and customers of Shaw only



A merge of this size has to go through various political reviews before it is finalized. Would you support or oppose the federal government approving the merger?

[asked of all respondents; n=1,000]

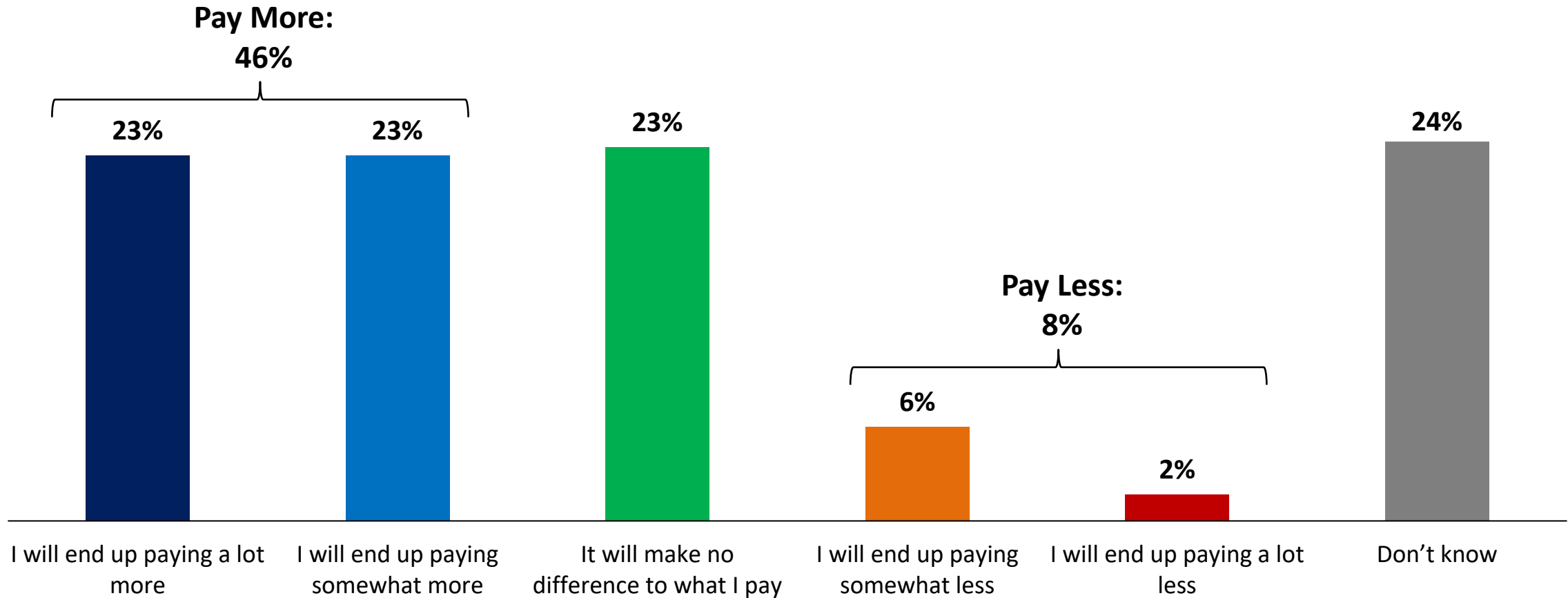


Perceived Impact: Nearly half of Canadians think this merger would result in them paying more, while only 8% think they would pay less



What do you think the impact of this merger will be on the price you pay for cable or telecom?

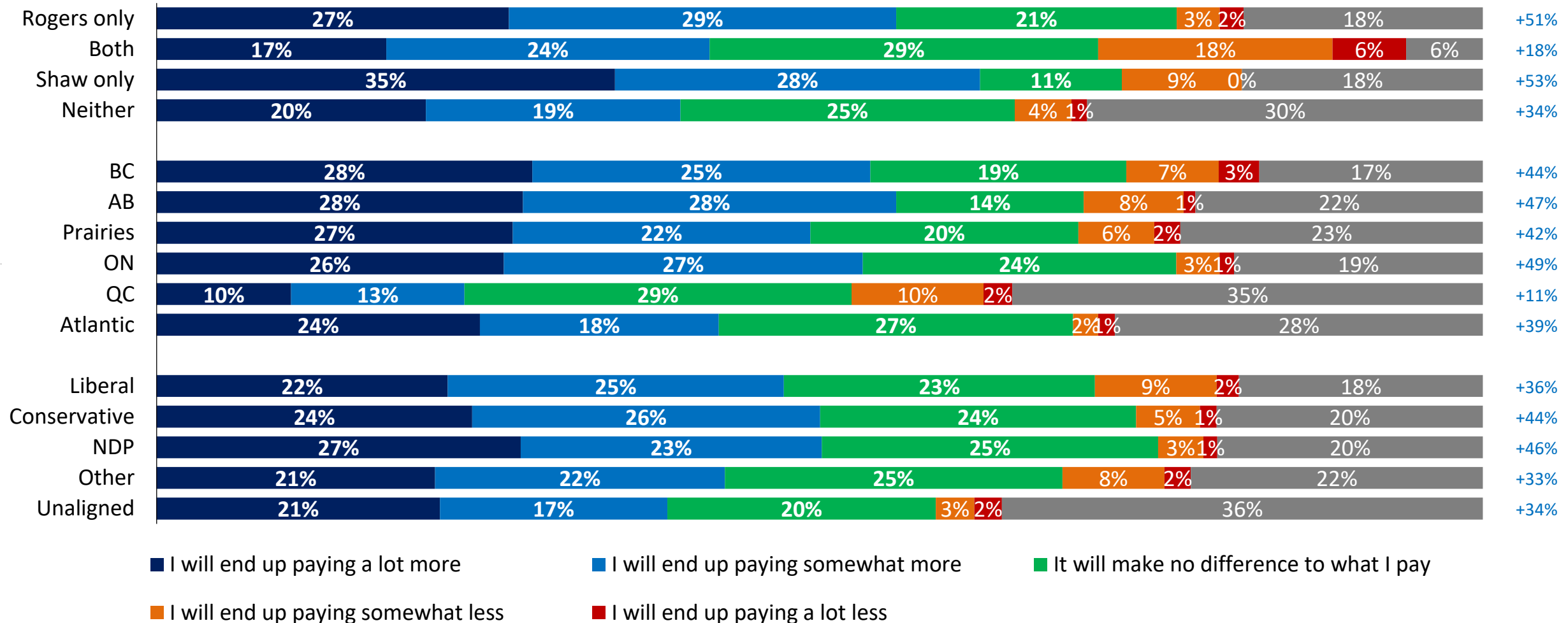
[asked of all respondents; n=1,000]



Perceived Impact: Among those who are already a customer of both Rogers and Shaw, 41% expect to end up paying more

Q What do you think the impact of this merger will be on the price you pay for cable or telecom?

[asked of all respondents; n=1,000]



Social Permission by Perceived Impact: Only 14% of those who expect no change to the price they pay are opposed to the merger

Q Social Permission **by** What do you think the impact of this merger will be on the price you pay for cable or telecom?
 [asked of all respondents; n=1,000]

		Impact of the Merger on Cost					
		Total	A lot more	Somewhat more	No difference	Somewhat or a lot less	Don't Know
		(N=1,000)	(N=228)	(N=228)	(N=233)	(N=75)	(N=236)
Support for the Merger	I support a merger of Shaw and Rogers	16%	2%	10%	30%	54%	8%
	I don't like the idea of a merger between Shaw and Rogers but I think it is necessary	13%	8%	18%	18%	19%	6%
	I oppose a merger of Shaw and Rogers	32%	72%	45%	14%	9%	6%
	Don't know	39%	18%	27%	38%	18%	80%
	Social Permission	29%	10%	28%	48%	73%	14%



Methodology



Survey Methodology

These are the results of an online survey conducted between March 18th to March 30th, 2021.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=2,261 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,000 based on Census data from Statistics Canada. We oversample provinces with recent provincial budgets and the total sample is weighted down to balance the sample nationally.

Field Dates: March 18th to March 30th, 2021.

Weighting: Results for Canada are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	165	7.3%	134	13.6%
Men 35-54	322	14.3%	165	16.7%
Men 55+	528	23.5%	181	18.3%
Women 18-34	328	14.6%	135	13.6%
Women 35-54	413	18.4%	171	17.2%
Women 55+	494	22.0%	205	20.6%
Region				
BC	199	8.8%	133	13.3%
AB	182	8.0%	110	11.0%
Prairies	80	3.5%	66	6.6%
ON	774	34.2%	388	38.8%
QC	524	23.2%	235	23.5%
Atlantic	502	22.2%	69	6.9%



Building Understanding.

Personalized research to connect you and your audiences.

For more information, please contact:

Greg Lyle

President

(t) 416-642-6429

(e) glyle@innovativeresearch.ca