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**Department of External Affairs**

**'The Media Study'**

16772067

**Presented by:**

**Client Services Group  
Communications Planning Services Branch**

# TABLE OF CONTENTS

INTRODUCTION AND HIGHLIGHTS . . . . .	1
1.0 TELEVISION . . . . .	4
1.1 Overview . . . . .	4
1.2 Heavy, Medium and Light Television Viewers . . . . .	4
1.3 English, French and Multilingual Television . . . . .	7
1.4 The Networks . . . . .	9
1.5 Popularity of Different Types of Television Programs . . . . .	11
1.6 Favourite Television News Announcer . . . . .	16
1.7 Attitudes Toward Television . . . . .	19
1.7.1 Television as Part of Daily Life . . . . .	19
1.7.2 Programming . . . . .	21
1.7.3 Censorship . . . . .	25
1.7.4 Foreign Ownership . . . . .	29
1.7.5 Competition . . . . .	30
1.8 Segmenting The Canadian Television Audience . . . . .	31
2.0 RADIO . . . . .	59
2.1 Overview . . . . .	59
2.2 Heavy, Medium and Light Radio Listeners . . . . .	59
2.3 English, French and Multilingual Radio . . . . .	61
2.4 Public, Private and American Radio Stations . . . . .	62
2.5 Popularity of Different Types of Radio Programs . . . . .	66
2.6 Program Opportunities . . . . .	70
2.7 Attitudes Toward Radio . . . . .	75
2.7.1 Radio as Part of Daily Life . . . . .	75
2.7.2 Programming: Canadian Content . . . . .	76
2.7.3 Censorship . . . . .	79
2.7.4 Foreign Ownership . . . . .	81
2.7.5 Competition . . . . .	82
3.0 DAILY NEWSPAPERS . . . . .	83
3.1 Overview . . . . .	83
3.2 Heavy, Medium and Light Newspaper Readers . . . . .	84
3.3 English and French Newspapers . . . . .	87
3.4 Most Popular Sections of the Newspaper . . . . .	88
3.5 Overall Evaluation of Newspaper Coverage . . . . .	93
3.6 Does Canada Have a National Newspaper? . . . . .	94
3.7 Attitudes Toward Daily Newspapers . . . . .	95

2

3.7.1	Newspapers as a Part of Daily Life . . . . .	95
3.7.2	Perceptions of Newspapers' Accuracy and Responsibility to Their Readers . . . . .	96
3.7.3	Canadian Content . . . . .	98
3.7.4	Censorship . . . . .	100
3.7.5	Foreign Ownership . . . . .	102
3.7.6	Competition . . . . .	103
4.0	MAGAZINES . . . . .	104
4.1	Overview . . . . .	104
4.2	Heavy, Medium and Light Magazine Readers . . . . .	104
4.3	Readership of News, Business and Consumer Magazines . . . . .	107
4.4	Paid Versus Controlled Circulation Magazines . . . . .	112
4.5	Attitudes Toward Magazines . . . . .	115
4.5.1	Magazines as Part of Daily Life . . . . .	115
4.5.2	Canadian Versus American Magazines . . . . .	116
4.5.3	Censorship . . . . .	117
4.5.4	Government Grants and Subsidies . . . . .	118
4.5.5	Foreign Ownership . . . . .	120
4.5.6	Competition . . . . .	121
5.0	COMPARATIVE EVALUATION OF ALL FOUR MEDIA . . . . .	122
5.1	Profile of Each Medium . . . . .	122
5.2	News and Information Sources . . . . .	124
6.0	ADVERTISING . . . . .	130
6.1	Perceived Impact of Advertising on Each of the Four Media . . . . .	130
6.2	Most Memorable Ad . . . . .	134
6.3	Influence of the Consumer Media on the Purchase of Business Products and Services . . . . .	137
6.4	Banning Advertising for Specific Products or Services . . . . .	140
6.5	Issues Related to Television Commercials . . . . .	144
7.0	CANADIAN CULTURE AND THE MEDIA . . . . .	147
7.1	Canada As A Separate Cultural Identity From The United States . . . . .	147
7.2	Responsibility Of The Media . . . . .	147

3

8.0	TELEVISION - ANCILLARY SERVICES . . . . .	149
8.1	Overview . . . . .	149
8.2	Cable Television . . . . .	150
8.2.1	Regional Penetration . . . . .	150
8.2.2	Use of Non-Licensed Cable Channels . . . . .	151
8.3	Cable Converters . . . . .	152
8.4	Pay TV . . . . .	153
8.5	Video Cassette Recorders . . . . .	154
9.0	TELEVISION - NEW PROPOSALS . . . . .	156
9.1	Funding the CBC . . . . .	156
9.1.1	Public Contributions . . . . .	156
9.1.2	Commercial-Free CBC Television . . . . .	157
9.2	Two New Cable Television Channels . . . . .	157
9.2.1	TV Canada . . . . .	158
9.2.2	Canadian All-News and Public Affairs Channel . . . . .	159
9.2.3	Other Proposed Cable Services . . . . .	161

**APPENDIX:**

**METHODOLOGY  
QUESTIONNAIRE (BOTH ENGLISH AND FRENCH)**

4

## INTRODUCTION AND HIGHLIGHTS OF THE REPORT

In November, 1986, Environics Research Group Limited conducted a survey of a representative sample of 4,006 Canadian adults on the subject of advertising and the mass media.

The survey was a one hour in-home interview, incorporating over 300 questions plus information on respondents' social, economic and demographic characteristics.

Environics' Media Study is the largest survey of Canadian attitudes towards television, radio, newspapers, magazines and advertising ever undertaken in this country.

The study was financially supported by subscribers representing major media and communications companies, national advertisers and advertising agencies, and governments.

The topic areas in the study include the use of and attitudes towards television, newspapers, magazines and radio, and advertising on each medium. Also covered are comparisons of the qualities of each medium and the media Canadians rely on to provide various types of information.

The study looks at advertising and identifies the products and services that Canadians feel should and should not be allowed to be advertised in the various media.

Environics' Media Study also examines the role the mass media play in expressing and maintaining Canada's cultural identity and obtains public reaction to proposals contained in the recent Caplan-Sauvageau Report on Public Broadcasting, including the idea of a new commercial-free public channel and an all-news channel.

The final section of the report covers consumer attitudes towards new media technology, such as VCR's.

Appended to the report is a detailed discussion of the research methodology and the interview schedule.

Among the hundreds of important findings in a study of this scope and depth, the researchers at Environics feel that several major points deserve to be highlighted:

1. Television, newspapers, magazines and radio all play an important and useful role in the daily lives of Canadians, but newspapers lead the other three media in this respect.
2. Television, on the other hand, is the most entertaining and exciting of the four media and it is also seen as the most open and frank in its presentation. For these reasons, television is not only the quintessential entertainer but has become a much more powerful medium for the presentation of information, news and commentary than it was 17 years ago.
3. Radio has a somewhat lower profile than the television and newspaper giants, but it is important in modern life for its ability to soothe and relax.
4. Magazines are important to Canadians as educational vehicles to learn about new things or ideas, new lifestyles and new trends in thought and in the marketplace.
5. Television is Canadians' window on the world. It is their primary source of entertainment and of news at the national and international level.
6. In contrast to the global role of television, newspapers are strongest as vehicles for information on local news, events and entertainment and for business and economic news.
7. Canadians are concerned about the absence of content on television that reflects a Canadian point of view, but there is little concern about the absence of Canadian content on radio, in newspapers and in magazines.
8. Canadians believe the media are important vehicles for the expression of our cultural identity. They are willing to support public policies and some limited government expenditures that would ensure the availability of Canadian cultural products. At the same time, Canadians are not very concerned about foreign ownership of the Canadian media. And while they admit American media have too much influence on the Canadian way of life, they are opposed to any form of Canadian cultural nationalism that would deprive them of access to foreign cultural products, most particularly American television programs, which most Canadians feel are superior to the domestic product.

9. Canadians are strong in their opposition to the censorship of newspapers, magazines and radio programming. However, when it comes to the censorship of the pervasive and provocative medium of television, Canadians are divided. Rock videos that may celebrate drugs or violence are a target of many people's concerns.
10. As media consumers, Canadians want the widest possible choice, with the least amount of government intervention. Emphasis is placed on self-regulation, for example, the classification of television programs according to their suitability for children.
11. Each of the media is seen as having commercial advertising that provides useful information about products and services. Newspaper and magazine ads are especially successful in this regard.
12. Most media users say magazine and newspaper ads are interesting to read and that television and radio commercials are entertaining and interesting to watch or listen to.
13. Canadians are reticent to admit that they are influenced by advertising. The largest number agree that newspaper ads often influence their purchase decisions, followed by magazine, television and radio advertising.
14. Nearly half of Canadians identify specific products or services they believe should be prohibited from advertising on one or more of the four media. Most frequently mentioned are feminine hygiene products and beer on television and cigarette, tobacco and liquor advertising on any medium. However, compared to 1969, the levels of opposition towards the most contentious product categories have dropped significantly.
15. Nearly two-thirds of cable subscribers would be interested in a new commercial-free public channel with Canadian, cultural, foreign and children's programming. Four in ten are interested in a new Canadian all-news and public affairs channel. Both new services were proposed in the recent Caplan-Sauvageau Report on Public Broadcasting.



## 1.0 TELEVISION

### 1.1 Overview

Television reaches all Canadians. According to the recent findings in Environics' Media Study, 99 per cent of all Canadian households have at least one working television set and 98 per cent of all Canadian adults watch at least some television during an average week.

One measure of how connected people are to a specific medium is whether or not they used that medium yesterday. Television has the highest penetration of "yesterday exposure," followed closely by radio. Eight in ten Canadians said that they watched television yesterday, three in four listened to radio and almost two-thirds read or looked into a daily newspaper.\*

**RECENT MEDIA EXPOSURE**  
**(Source: Environics' Media Study)**  
**% of Adult Canadians Who Used**  
**Each Medium "Yesterday"**

Television	80%
Radio	77
Daily newspapers	63

### 1.2 Heavy, Medium and Light Television Viewers

A.C. Nielsen and the Bureau of Broadcast Measurement take frequent and detailed readings of Canadians' television habits. This study has not attempted to duplicate the work of these measurement specialists. Respondents were asked, however, to estimate the number of hours they personally spend watching television in an average week. The total sample was then divided into three roughly equal groups which were labelled as "heavy," "medium" and "light" television viewers. The reader is cautioned against using these categories as absolute measures of television usage. They are based on viewers' own estimates and tend to understate the actual number of hours of television watched. The delineation of heavy, medium and light television users is for analytical purposes only; to determine whether the amount of television watched affects people's attitudes toward the medium.

\*Note: Respondents who were interviewed on a Sunday or Monday were asked if they had read or looked into any of last Friday's daily newspapers.

Throughout this report, television users are defined as:

<u>Estimated # of Television User Type:</u>	<u>Average # of Hours Per Week</u>	<u>Hours Per Week</u>
Heavy users	21 hours or more	35.0
Medium users	11 to 20 hours	16.4
Light users	10 hour or less	6.4

Time spent with television is largely a reflection of the amount of at-home leisure time people have to spend. Homemakers, the unemployed and the retired, for example, appear to devote more hours to television than, say, people who work outside the home - either full or part time. Parents of pre-school children say that they watch more television than parents of school-aged children.

According to the Bureau of Broadcast Measurement (BBM), the amount of television watched in an average week:

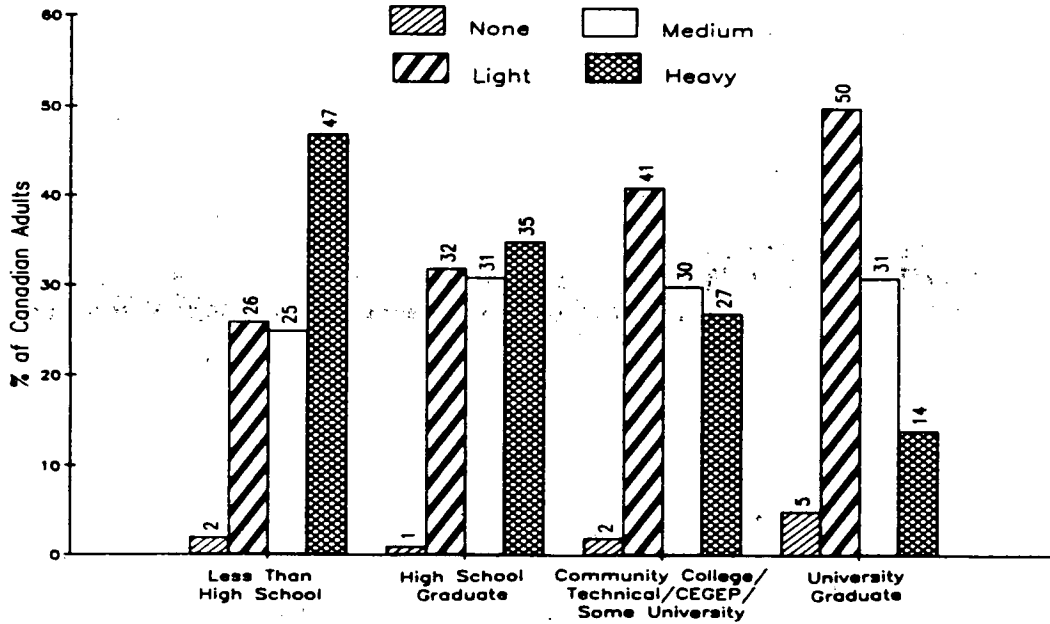
- increases with age and is highest among Canadians aged 65 and over;
- is somewhat higher among women than men;
- regionally, is highest in the Maritimes and among Quebec francophones; is lowest in Ontario, Alberta and among Quebec anglophones.

BBM also shows that francophones in general watch more television than anglophones. For an indication of the television habits of third language Canadians, we need to turn to Environics' Media Study. Respondents to this survey whose first language is neither English nor French estimate that they watch television an average of **two hours less** per week than other adult Canadians.

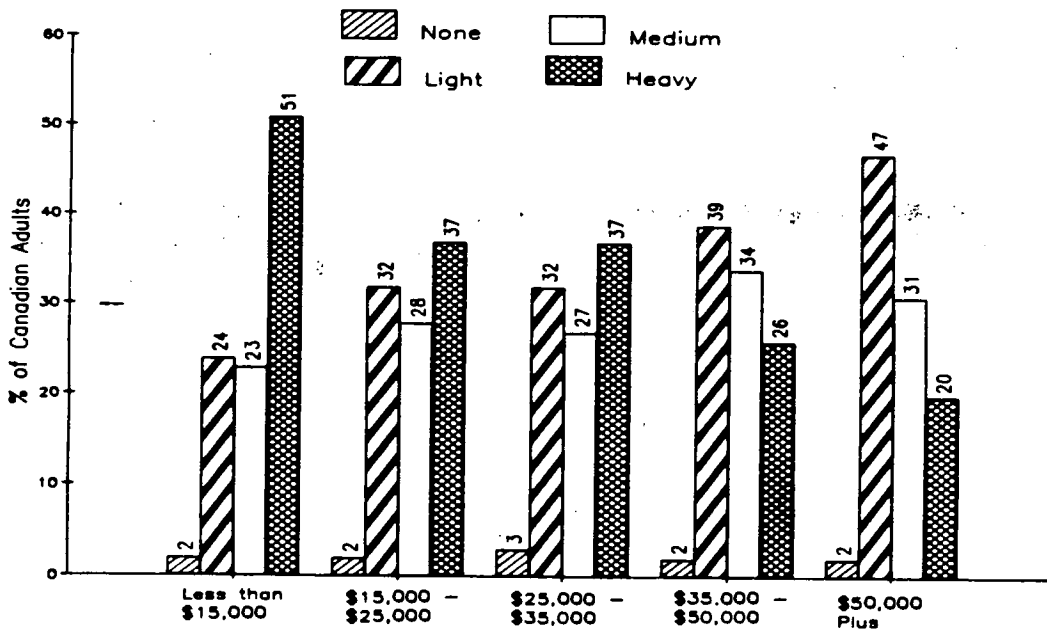
Canadians' perceptions of their television viewing habits are linked to level of education and income. Again, from Environics' Media Study Canadians at the bottom end of the socio-economic scale, i.e., those with less than a high school education or living in households with annual incomes below \$15,000, are most likely to report being heavy television viewers.

Conversely, better educated and more affluent Canadians, i.e., university graduates or people with annual household incomes of \$50,000 or more, are most likely to fall into the light television viewer classification.

### HEAVY, MEDIUM AND LIGHT TELEVISION VIEWERS By Level of Education



### HEAVY, MEDIUM AND LIGHT TELEVISION VIEWERS By Level of Household Income



### 1.3 English, French and Multilingual Television

Almost half of Canada's adult francophones have some facility in both English and French. This compares with only 13 per cent of anglophones who are able to converse in both official languages.

The bilingualism of many Canadian francophones means that they have more media choices than their unilingual English counterparts. It also means that the French-speaking audience which supports French language broadcasting is, to some extent, dissipated by English media in Canada and from the United States.

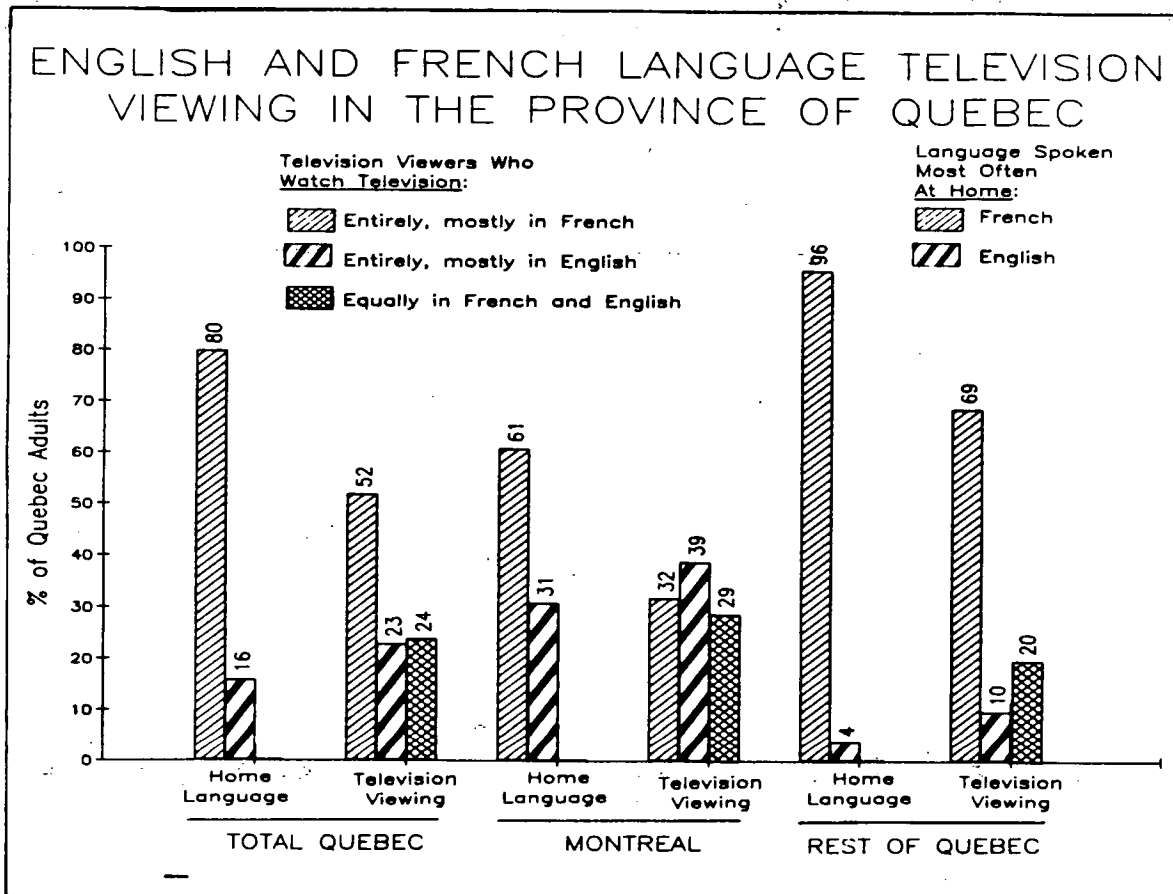
The majority of Canadian francophones (59%) say that they watch French language television all or most of the time. A significant minority, however, (41%) indicate that they watch English language television broadcasts either most of the time (15%) or in equal measure to French television (26%).

	<u>Anglophones**</u>	<u>Francophones**</u>
<u>% who are able to converse:</u>		
Only in English	76%	--
Only in French	--	48%
In English and French	13	49
In another language	11	3
 <u>% who say that they watch television:</u>		
Entirely/mostly in English	98	15
Entirely/mostly in French	*	59
Equally in English and French	1	26
Entirely/mostly in another language	*	*
Equally in English and another language	*	--
Equally in French and another language	--	*

\* Less than 0.5%

\*\* Anglophones = Canadians who most often speak English at home  
Francophones = Canadians who most often speak French at home

In the province of Quebec, where 80 per cent of the adult population are francophones, only 52 per cent of television viewers watch French language television all or most of the time. Competition for the media attention of the province's francophones is most intense in Montreal where only one-half - 32 per cent of Montreal's 61 per cent French speaking adults - are oriented more to French than English language television broadcasts. Outside Montreal, French language television captures a larger share of the francophone audience. Here, almost 70 per cent watch television entirely or mostly in French.



Toronto is the only city in Canada with a television station that is dedicated to multilingual programming. Elsewhere, multilingual television is available through some community cable channels and through Pay TV. The penetration of television viewing in a language other than English or French, therefore, tends to be concentrated in Toronto and reaches 12 per cent of the potential third language audience overall.

**ORIENTATION OF THIRD LANGUAGE CANADIANS  
TO ENGLISH, FRENCH AND MULTILINGUAL TELEVISION**

		<u>% of Third Language* Television Viewers Who Say That They Watch Television:</u>
Entirely, mostly in English		74%
Entirely, mostly in French		3
Equally in English and French		<u>11</u>
Sub-total		88
Entirely, mostly in another language		3
Equally in English and other language		8
Equally in French and other language		<u>1</u>
Sub-total		12

\* Third language = Canadians whose home language is other than English or French

The "other" language mentioned in connection with television is most often Italian followed by Chinese and Portuguese.

**1.4 The Networks**

The network choices available to Canadian television viewers can be grouped into six major categories:

1. Canadian public networks (CBC, Radio-Canada)\*
2. Canadian private networks (such as CTV and its regional affiliates, Global in Ontario, TVA and Quatre Saisons in Quebec)
3. American commercial networks (ABC, NBC, CBS)
4. American Public Broadcasting Service (PBS)

\* CBC is the English language component and Radio Canada is the French language component of the Canadian Broadcasting Corporation.

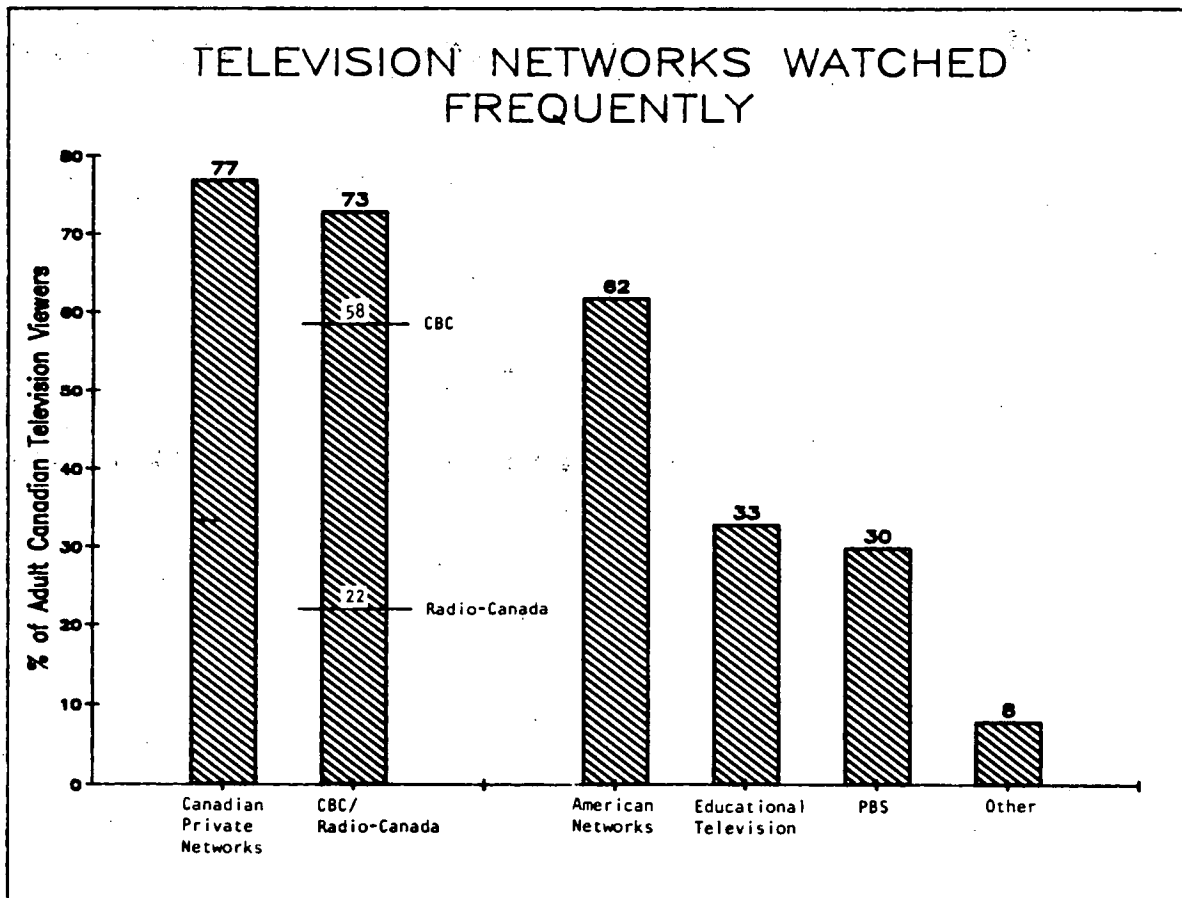
5. Educational television (such as TVOntario, Access, Knowledge, Radio Quebec)
6. Other (including multicultural and multilingual television)

Canadian television viewers have almost universal access to either the CBC or Radio-Canada and to private networks such as CTV and its regional affiliates. American networks also reach the majority of Canadian viewers although to a lesser extent than CBC or CTV, while specialty networks such as Canadian and American education television are available to Canadian viewers on a sporadic basis.

Given that access is not always universal, it is nevertheless useful to examine just who is watching what.

Over three in four television viewers say that they regularly tune in to one or more of the Canadian private networks. The Canadian public television networks - CBC and Radio-Canada - are almost as popular, followed by the American networks.

One in three Canadian viewers say that they regularly watch educational television and 30 per cent claim to watch PBS.



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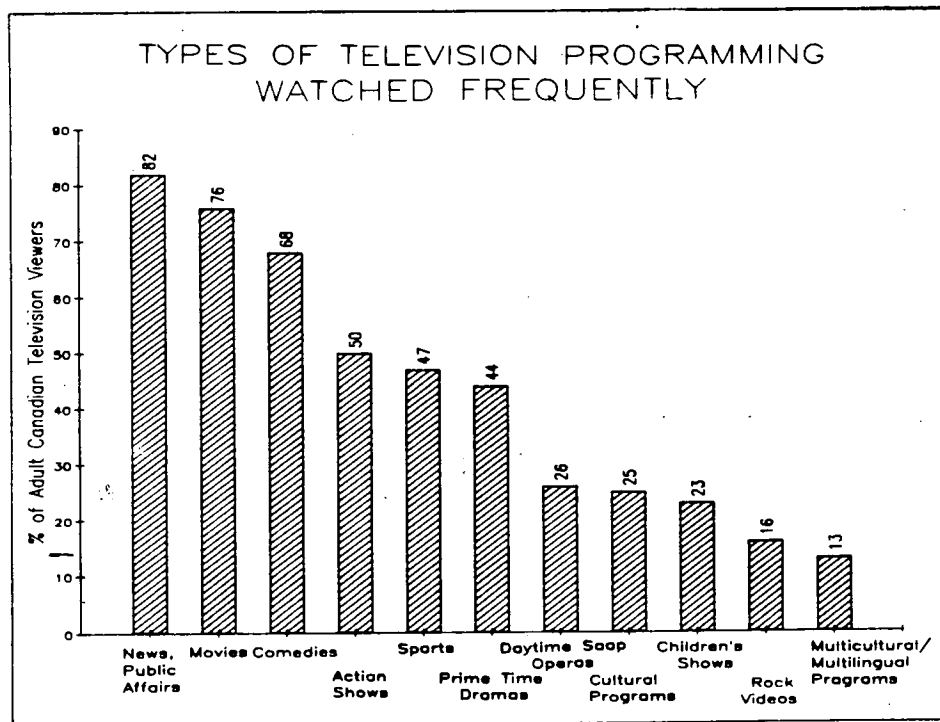
## 1.5 Popularity of Different Types of Television Programs

According to television viewers, news and public affairs is the most watched type of adult programming in the country. Eighty-two per cent of adult television viewers say that they watch news and public affairs programs on a regular basis. As we shall see in the section on news sources, the role of television as the major disseminator of international, national and local news has grown since 1969 and it now dominates all other news media even in the area of in-depth news reporting and analysis.

Movies follow news and public affairs. Seventy-six per cent of adult Canadian television viewers say they frequently watch televised movies.

Although television viewers are notoriously fickle, at the present time comedies are more popular than either action shows or prime time dramas.\*

Almost one-half of all adult television viewers say that they watch sports programs on a regular basis; one-quarter watch daytime soap operas, cultural programs and children's shows; 16 per cent frequently watch rock videos and 13 per cent regularly tune in to multicultural or multilingual programs.

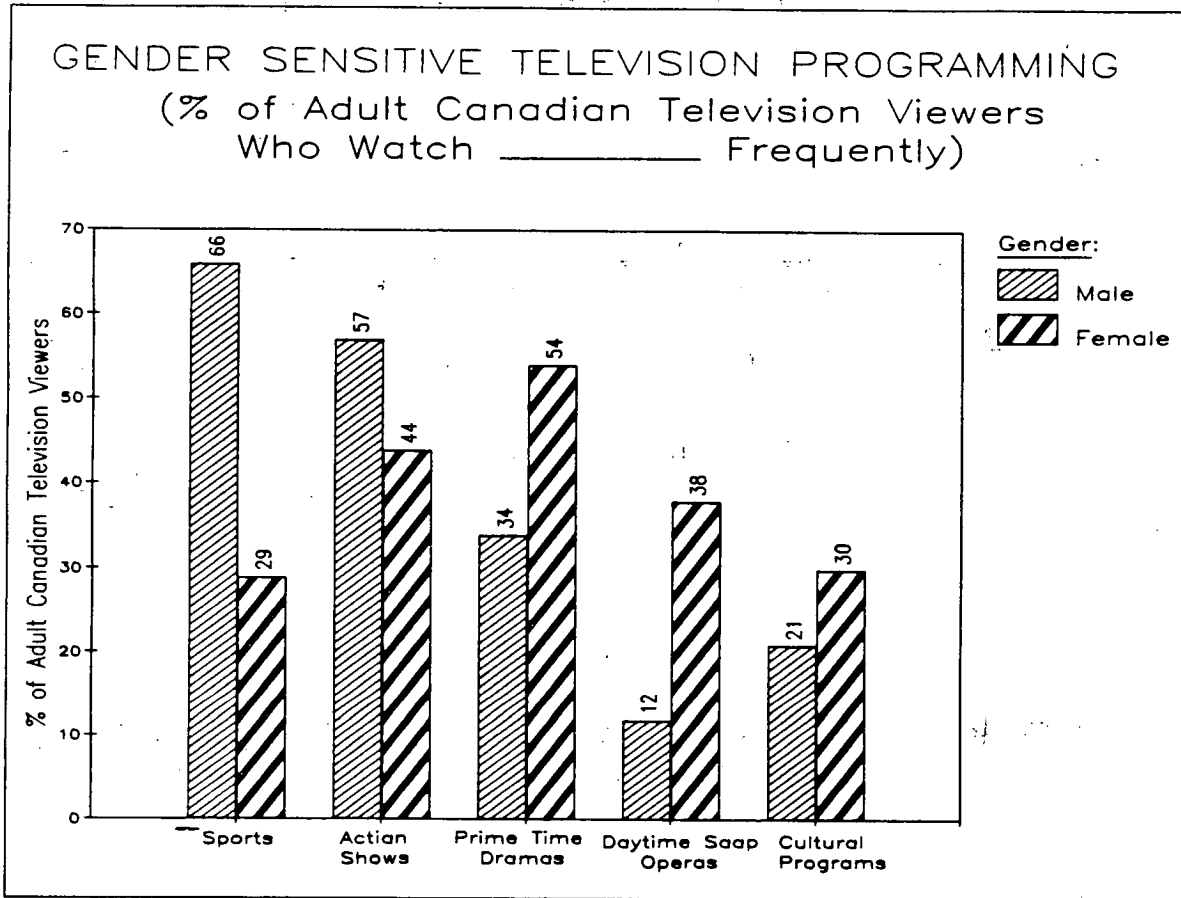


\* English speaking respondents were given Dallas, Dynasty and St. Elsewhere as examples of prime time dramas. In French, the examples were Dynasty, Lance et compte and Le temps d'une paix.



While television is a universal medium, television programs are often targeted to specific segments of the viewing public, reflecting the separate interests of men and women, the young and old and Canada's two major linguistic groups: English and French.

Men are much more likely than women to watch sports programs, by a ratio of over 2 to 1. They are also somewhat more likely to watch action shows. Women, on the other hand, are more oriented toward prime time dramas and daytime soaps than men and are somewhat more likely to watch cultural programs.

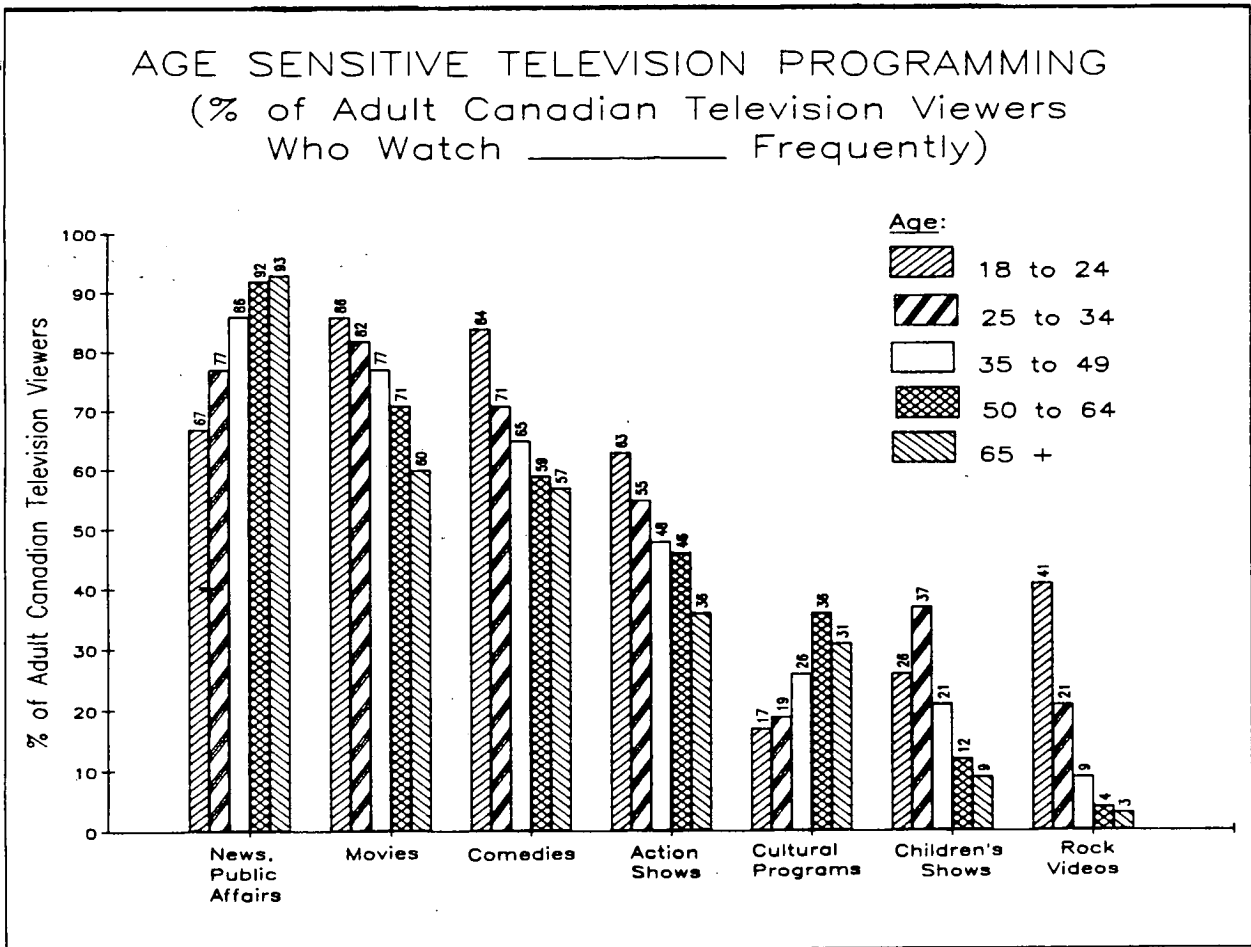


Age sensitive programming includes news and public affairs, which is least popular among young people but increases in popularity among successively older age groups. The appeal of movies, comedies and action shows, on the other hand, is highest among young people and declines with increasing age.

The audience for cultural programs tends to be older and peaks with the 50 to 64 age group.

Adults who watch children's programming are most likely to be younger, particularly within the 25 to 34 age band. But they are not exclusively "moms" with "tots." Almost as many men as women say that they regularly watch children's shows (20% versus 24%). And although the audience for children's programming is skewed towards parents with children living at home - particularly with children under the age of 6 - 13 per cent of those with no children also say that they frequently watch children's shows.

Rock videos first appeared on the Canadian disco scene in the late seventies and moved onto television in the early 1980's. The audience for this new form of television entertainment is decidedly young and drops off rapidly among television viewers over the age of 25.

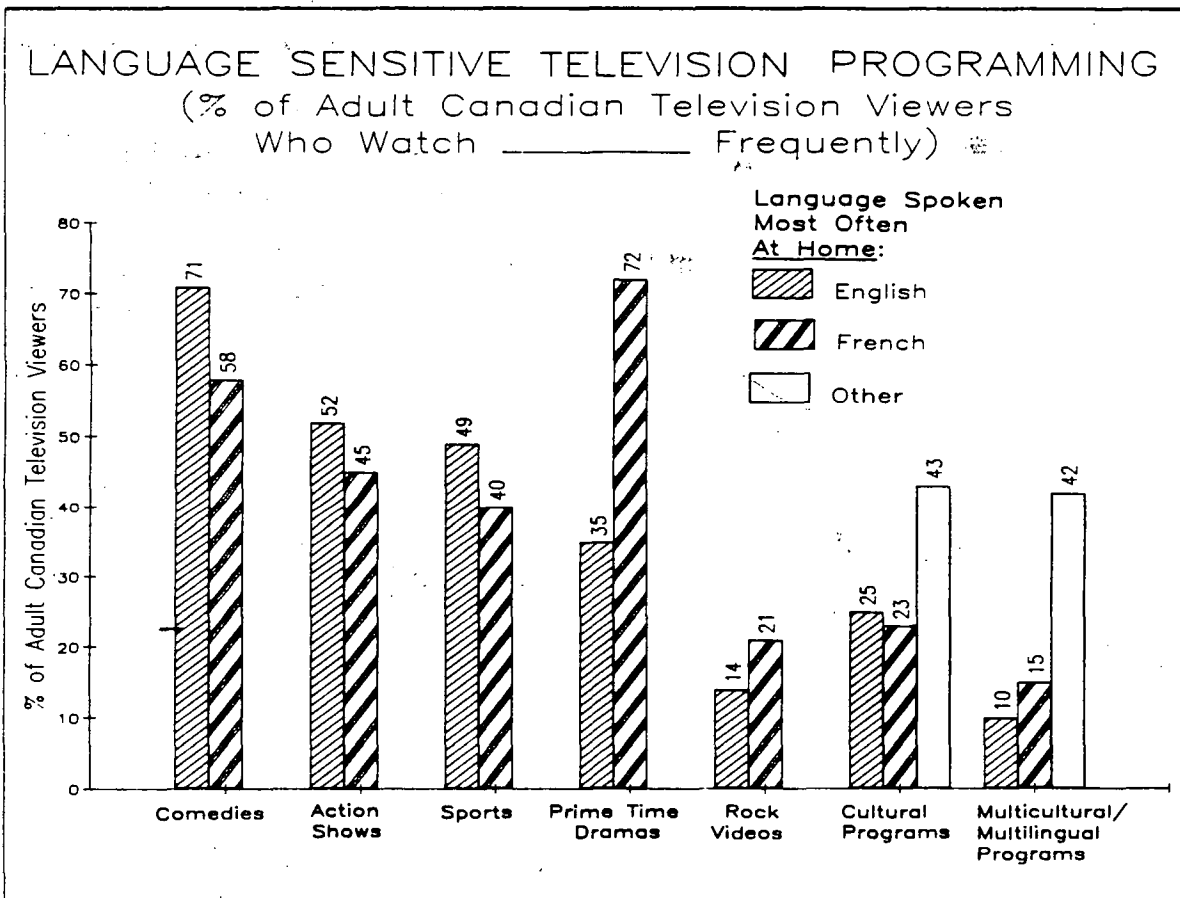


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Prime time drama has been a cornerstone of French language programming in this country since *La Famille Plouffe* was first broadcast in the 1950's. While the programs themselves have changed, Canadian francophones remain interested in and loyal to this type of program format. Seventy-two per cent of all French-speaking television viewers watch prime time dramas on a regular basis; more than twice the percentage of frequent English viewers. Francophones are also more likely to watch rock videos.

Comedies, action shows and televised sports are somewhat more popular among English-speaking television viewers than among their French-speaking counterparts.

Canadians whose home language is other than English or French are as likely as Canadians in general to watch the range of various program types. There are two notable exceptions: third language Canadians are not only more likely to be frequent viewers of multilingual programming, but are also more inclined to tune in to cultural programming in general.



18

Several regional differences are worth noting. Compared with other English-speaking Canadians:

- Maritimers are more likely to watch daytime soap operas on a regular basis and are less likely to watch cultural programs.

	% Maritime Television Viewers Who Watch:	% English-Speaking Television Viewers Who Watch:	NET DIFFERENCE
Daytime soap operas	41	27	+14
Cultural programs	11	25	-14

- While Ontarians' overall viewing preferences reflect the national tastes of English-speaking Canadians, more Torontonians regularly tune in to prime time dramas, cultural programs and multicultural or multilingual programs than other Ontarians. Action shows and televised sports, on the other hand, are more popular outside Toronto.

The attention paid to multicultural and multilingual programming is not exclusive to Toronto. Canadians in general, living in urban areas, are more likely to frequently watch this type of programming (16%) than Canadians living in rural areas (10%). Regionally, multicultural/multilingual programming is most popular in Quebec followed by British Columbia (including Vancouver) and Toronto.

	% Toronto Television Viewers Who Watch:	% Rest of Ontario Television Viewers Who Watch:
Action shows	48	53
Sports	44	49
Prime time dramas	36	30
Cultural programs	34	24
Multicultural/multilingual programs	15	9

- Television viewers in Manitoba and Saskatchewan are somewhat more oriented toward prime time dramas and somewhat less oriented toward cultural programs than other English-speaking Canadians.

	% Manitoba/Sask. Television Viewers Who Watch:	% English-Speaking Television Viewers Who Watch:	NET DIFFERENCE
Prime time dramas	46	35	+11
Cultural programs	18	25	- 7

- Televised sports broadcasts appear to be most popular in the Prairies, particularly among Albertans, 56 per cent of whom say they frequently watch sports programs versus 49 per cent of English Canadians as a whole.
- British Columbians, like Ontarians, reflect the viewing preferences of all Canadian anglophones.
- In Quebec, the main differences have already been discussed and stem more from linguistic and cultural differences than from regional orientation. Quebecers living outside Montreal, who tend to be unilingual and francophone, are much more interested in prime time dramas, and are somewhat more interested in rock videos and daytime soap operas than Montrealers. Montrealers, on the other hand, are twice as likely as other Quebecers to watch cultural programs on a regular basis.

	<u>% Montreal Television Viewers Who Watch:</u>	<u>% Rest of Quebec Television Viewers Who Watch:</u>
Prime time dramas	51	81
Cultural programs	40	18
Rock videos	14	24
Daytime soap operas	15	23

## 1.6 Favourite Television News Announcer

In 1969, an American broadcaster - Walter Cronkite - topped English Canadians' list of favourite news announcers.

Times have changed. While Canadians tend to favour Canadian news announcers, no one person dominates the list in English Canada despite the national exposure of news personalities such as Lloyd Robertson and Knowlton Nash. Preferences are fragmented and in some regions of the country, local newscasters such as Glen Tilley in the Maritimes or Tony Parsons in British Columbia are more popular than the national news broadcasters. The Ottawa broadcaster, Max Keeping, also has a considerable following in Ontario, outside of Toronto.

Among francophones, Gaetan Montreuil, Pierre Nadeau and Roger Gosselin shared the top spot in 1969. Today, Bernard Derome - Radio Canada's evening news announcer - is by far the most popular French-speaking newscaster.

Many English and French speaking Canadians associated their favourite news announcer with the call letters of their local television station but were unable to identify the newscaster by name. These answers were incorporated into the "other" category along with scattered references to local news personalities. The "other" category is large, representing 50 per cent of anglophone and 44 per cent of francophone responses overall.

**FAVOURITE TELEVISION NEWS ANNOUNCER**  
**- Among English and French-speaking Canadians -**

	<u>% of Television Viewers Who Frequently Watch News And Public Affairs Programming</u>
<u>English-speaking Canadians</u>	
Lloyd Robertson	8
Knowlton Nash	7
Tony Parsons	5
Dan Rather	3
Peter Truman	2
Peter Jennings	2
Bill Haughland	2
Barbara Frum	2
Max Keeping	2
Jan Tennant	2
Other	50
Don't know	16
<u>French-speaking Canadians</u>	
Bernard Derome	28
Pierre Bruneau	4
Jacques Moisan	4
Other	44
Don't know	20

**FAVOURITE TELEVISION NEWS ANNOUNCER**

- By Region -

	<u>% of Television Viewers Who Frequently Watch News And Public Affairs Programming</u>
<u>Atlantic Provinces</u>	
Glen Tilley	11
Lloyd Robertson	7
Knowlton Nash	6
Barbara Frum	2
Other	53
Don't know	20

Quebec

	<u>Total</u>	<u>Montreal</u>	<u>Rest of Quebec</u>
Bernard Derome	25	19	30
Bill Haughland	6	10	1
Pierre Bruneau	4	5	3
Jacques Moisan	4	3	5
Other	41	42	42
Don't know	20	21	19

Ontario

	<u>Total</u>	<u>Toronto</u>	<u>Rest of Ontario</u>
Lloyd Robertson	8	9	8
Knowlton Nash	7	9	7
Peter Truman	5	5	5
Dan Rather	4	2	5
Max Keeping	4	--	7
Jan Tennant	3	4	3
Peter Jennings	3	3	3
Barbara Frum	2	1	2
Dini Petty	2	4	*
Gord Martineau	2	5	*
Dan Maclean	2	--	4
Other	42	40	42
Don't know	16	18	14

Manitoba/Saskatchewan

Lloyd Robertson	15
Knowlton Nash	8
Peter Mansbridge	3
Barbara Frum	2
Other	52
Don't know	19

Alberta

Lloyd Robertson	9
Knowlton Nash	7
Barbara Frum	3
Dan Rather	3
Tom Brocaw	3
Peter Jennings	2
Other	55
Don't know	17

20

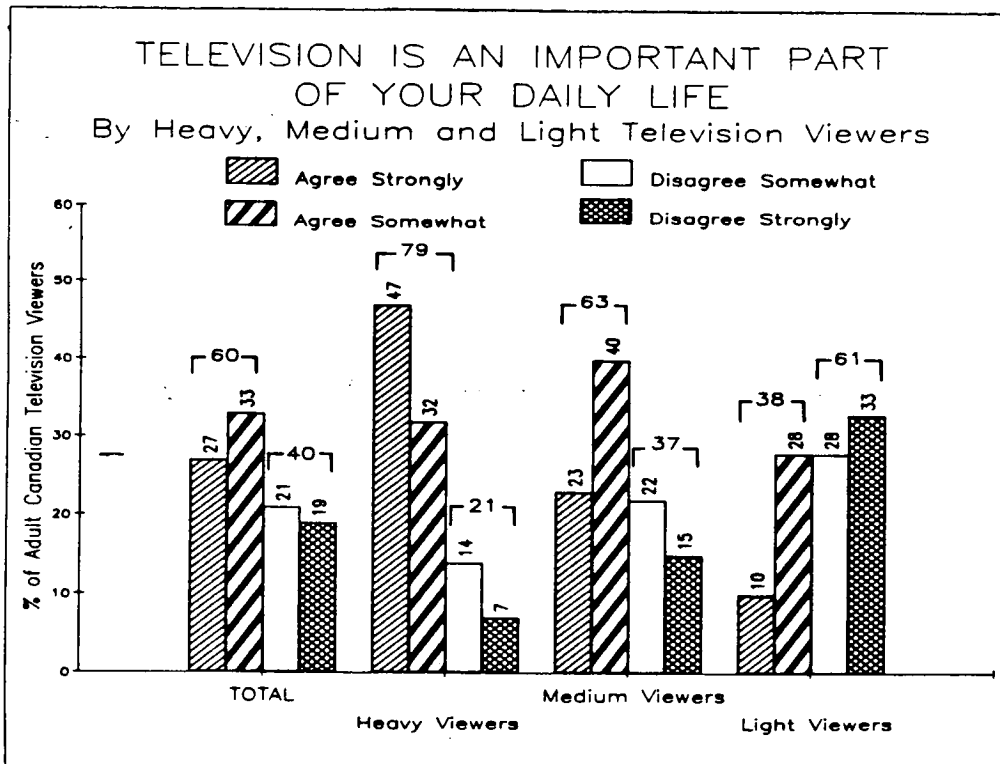
**British Columbia**

Tony Parsons	30
Pamela Martin	8
Jim Hart	6
Bill Good	5
Lloyd Robertson	4
Knowlton Nash	3
Dan Rather	3
Barbara Frum	2
Other	25
Don't know	12

**1.7 Attitudes Toward Television**

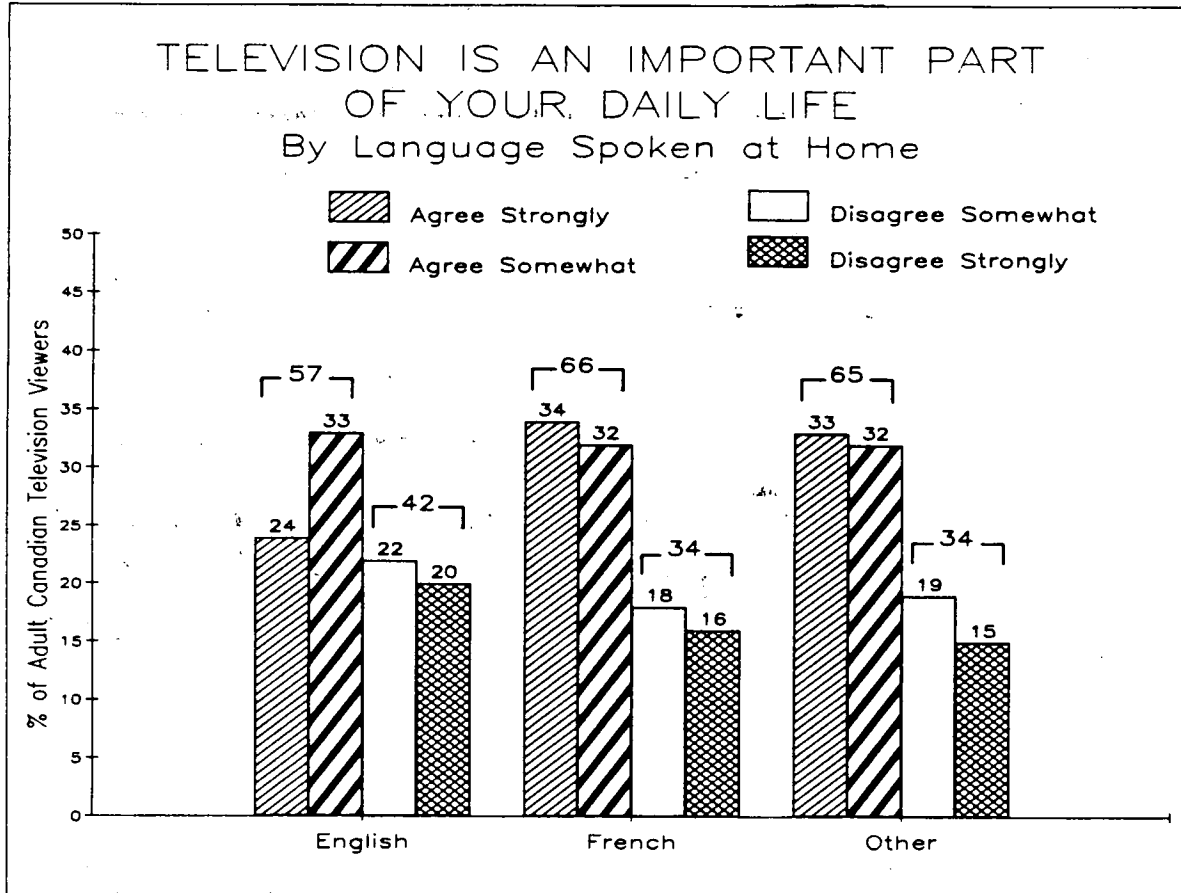
**1.7.1 Television as Part of Daily Life**

The majority of Canadian television viewers - 60 per cent - agrees either strongly or somewhat that television is an important part of daily life. Not surprisingly, heavy television viewers - in particular, the elderly and those with lower levels of education and household income - are most reliant on television. But medium viewers are not far behind. In each instance, the majority - 79 per cent of heavy viewers and 63 per cent of medium viewers - say that television is important to them on a daily basis.





Television, as a vital medium, spans all age, gender and socio-economic groups and its degree of importance is mostly related to time spent watching. The exception lies in the attitudes of English, French and third language or "other" speaking Canadians. Francophones, who watch somewhat more television on average than anglophones, and "other" Canadians who watch somewhat less television, are more likely to identify with the importance of television (66% and 65% respectively) than English-speaking Canadians (57%).



## 1.7.2 Programming

### Canadian Content

All Canadian broadcasters are required under the Canadian Radio-television and Telecommunications Commission's (CRTC) regulations to broadcast no less than 60 per cent of Canadian-originated programming throughout the day. During prime time, 6 p.m. to midnight, the Canadian content quotas are 50 per cent for private broadcasters and 60 per cent for the CBC.

Much of the current "Canadian content" airtime is devoted to information programs such as news and public affairs. So when Canadian television viewers support the notion that there are "not enough television programs which reflect a Canadian point of view" they may be referring to entertainment programs; that is, Canadian counterparts to American programs such as made-for-television movies, serial dramas and situation comedies which have definitively, if not accurately, painted a portrait of American culture both for Americans and Canadians.

Sixty per cent of Canadian television viewers agree that there are not enough television programs which reflect a Canadian point of view; only 33 per cent disagree. Almost as many - 58 per cent - believe that American television programs have too great an influence on the Canadian way of life; only 35 per cent disagree.

Language and television viewing behaviour have little influence on people's attitudes toward the question of Canadian content and influence of American broadcasts. English and French-speaking Canadians; heavy, medium and light television viewers; people who watch public and private Canadian networks, public and commercial American television networks are all equally supportive of more Canadian programming and are equally concerned about the impact of American programming on Canadian audiences.

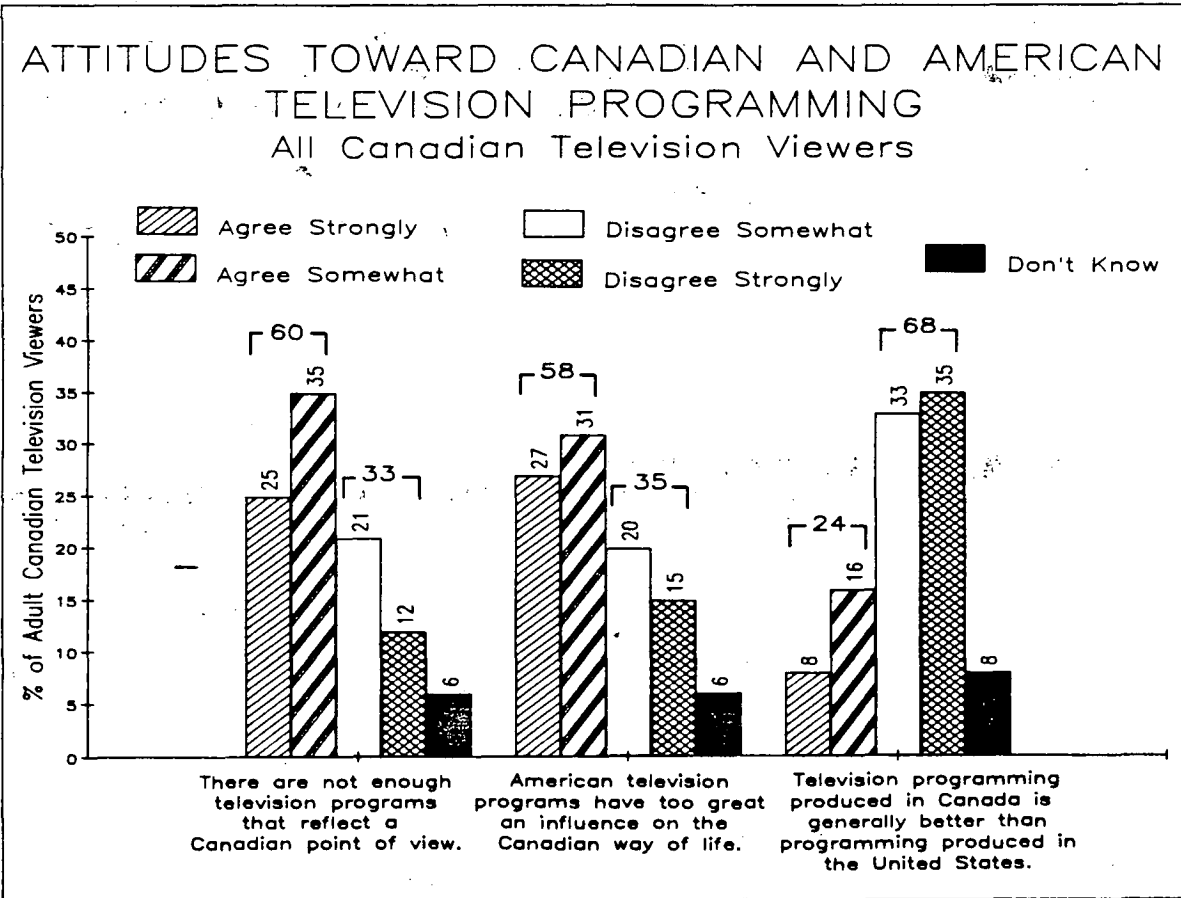
Canadians do respond somewhat differently according to their age. Young people aged 18 to 24 are most likely to agree that there are not enough Canadian-oriented television programs. This group plus the 25 to 34 year olds are most likely to be concerned about the negative influence of American television.

Canadian broadcasters have maintained that the size of the Canadian market is too small and the competition from American networks too pervasive to support extensive production of Canadian-originated programming without government funding or tax incentives. While it is outside the range of this report to analyze the feasibility of increasing the volume or quality of Canadian programming, the study does measure current perceptions of Canadian versus American television productions.

From an historical perspective, the 1969 Senate Committee Report on Mass Media found that when Canadians were asked to state a preference between Canadian and American television programs, 60 per cent opted for American programs and 35 per cent for Canadian shows. Since then, Canadians' access to American television programming has increased substantially and so has their perception that American television productions are generally better than Canadian ones.

Today, only one in four - 24 per cent - of adult Canadian television viewers believe that television programming produced in Canada is generally better than programming produced in the United States. On the flip side of this issue, a national survey conducted in August, 1985, on behalf of the Friends of Public Broadcasting found that 75 per cent of Canadian adults feel that American television networks produce better programs than Canadian networks. The ratio in favour of American programming is 3 to 1.

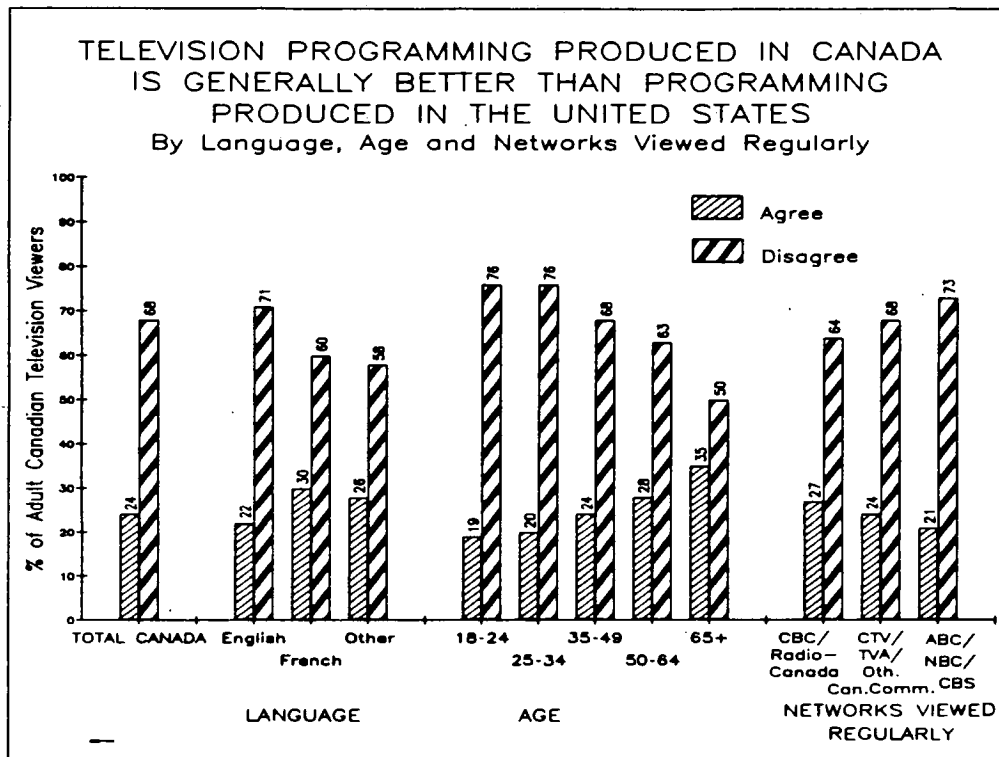
We are hearing the voice of a Canada that supports, in principle, the concept of programming reflective of its own culture, but will not settle for second best. As long as Canadians feel that American television programs are superior to domestic programs, there will be considerable opposition to any form of Canadian cultural nationalism which would limit access to foreign cultural products.



26

More francophones and Canadians whose first language is other than English or French have positive attitudes toward television programming produced in Canada than do anglophones (30% and 28% versus 22%). Similarly, regular viewers of Canada's public television networks - CBC and Radio-Canada - are marginally more supportive of Canadian programming (27%) than regular viewers of Canada's commercial networks (24%) or the American networks (21%).

The characteristic which most distinguishes those with positive and negative opinions, however, is age. While young adults, under the age of 35, are most likely to be in favour of increased programming with a Canadian slant and are most concerned about the influence of American programming on our way of life, they are also most critical of current Canadian television productions. The popularity of televised movies, comedies, action shows and rock videos is skewed toward this age group. These are also the program types which tend to originate in the United States.



On a positive note, Canadians who regularly watch cultural programming such as serious drama, classical music, ballet or opera and those who regularly tune in to multicultural or multilingual programming are more favourable in their assessment of Canadian-originated television productions than television viewers in general (34% of both the cultural and multilingual audiences say that Canadian television productions are better than American; only 24% of the general public feel this way).

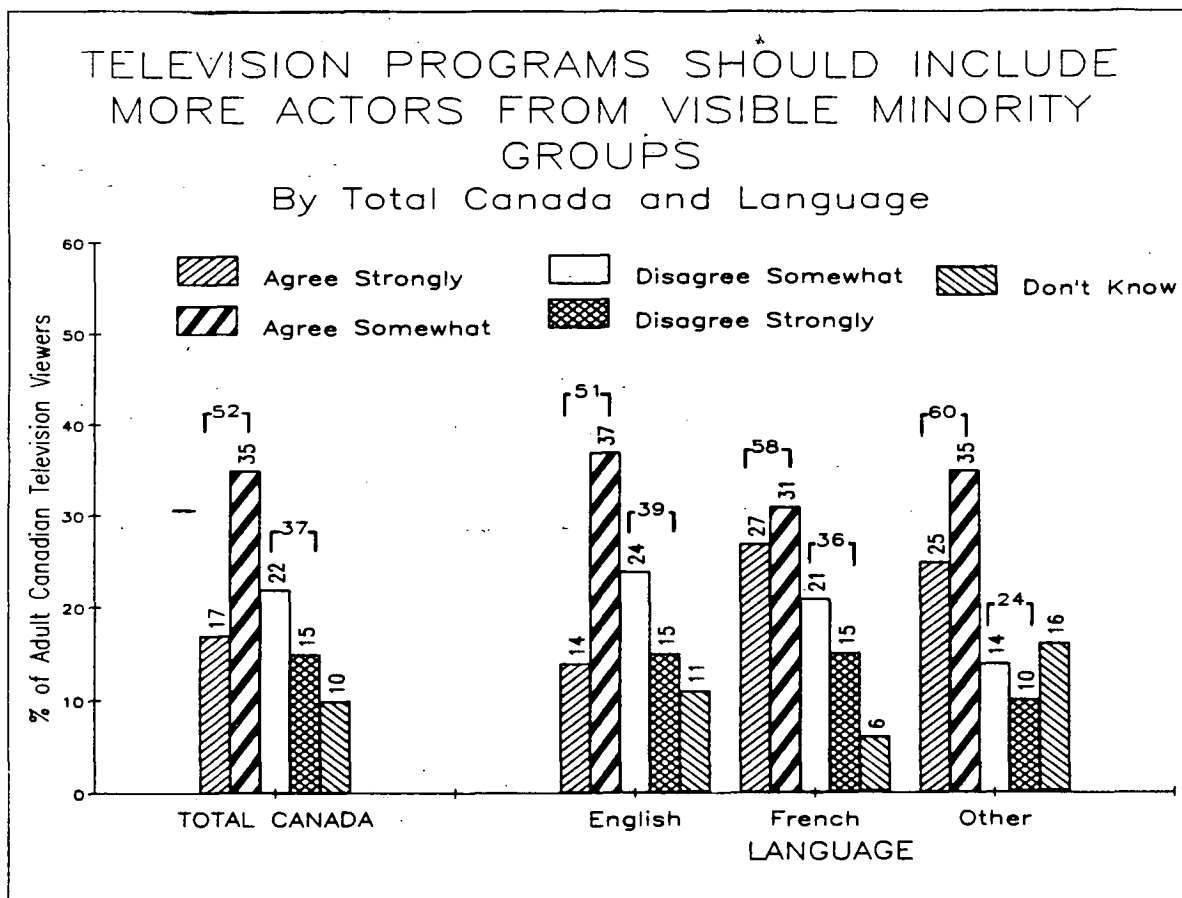
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## Visible Minorities

The portrayal of visible minority groups on English language Canadian television networks was examined in a 1980 content analysis study conducted by PEAC Developments for the Secretary of State, Multiculturalism Directorate. The findings included a breakdown of the ethnic identity of program characters which appeared during a typical week of prime time television on CBC and CTV. Less than 10 per cent of the actors in either major or minor roles were from visible minority groups. The visible minority groups represented were black, Southeast Asian and Native Canadian.

The percentage representation of visible minorities on Canadian television networks is probably higher today both on programs which originate in Canada and those from the United States. However, the majority of Canadian television viewers - 52 per cent - believe that visible minority groups continue to be underrepresented and that television programs should include more actors from racial minorities.

Francophones and Canadians whose home language is other than English or French feel most strongly about this issue. The majority of anglophones also agree but fewer are strongly convinced that television programs should include more actors from visible minority groups.



26

In terms of ethnicity, television viewers of British origin are least likely to support increases in visible minority groups on television (48% are in favour; 40% are against).

### 1.7.3 Censorship

Canadians are divided on the issue of television censorship. Most Canadians believe that television is too violent and that rock videos should be censored but only half the viewing public would like to see stricter censorship of television in general. Half would also restrict the flow of American and other foreign programming on Canadian television stations despite the finding that only one-quarter of Canadian television viewers think that television programming produced in Canada is generally better than programming produced in the United States.

### Violence, Sex and Illegal Drugs

Seventy-seven per cent of Canadians say that television is far too violent. A smaller majority - 53 per cent - feel there is too much sex and a minority - 35 per cent - say there is too much about illegal drugs on television today.

Since 1969, Canadians have become more comfortable with and tolerant of illegal drugs and sex on television. The amount of violence on television, however, continues to be offensive to over three-quarters of the adult Canadian general public.

### ATTITUDES TOWARD VIOLENCE, SEX AND ILLEGAL DRUGS ON TELEVISION

	<u>Envirionics' Media Study</u>	<u>1969 Senate Report on Mass Media</u>
% of Canadians who say there is too much _____ on television		
Violence	77	78
Sex	53	66
Illegal drugs*	35	54

\* In 1969 the question read "too much drug usage"

Here, as in other areas relating to tolerance and censorship, women tend to be more critical of the amount of violence, sex and illegal drugs on television while men are somewhat more permissive. Young people are most tolerant and the level of tolerance declines with increasing age. Socio-economic factors also affect people's attitudes toward the content of television programming. In the area of sex and illegal drugs, those at

29

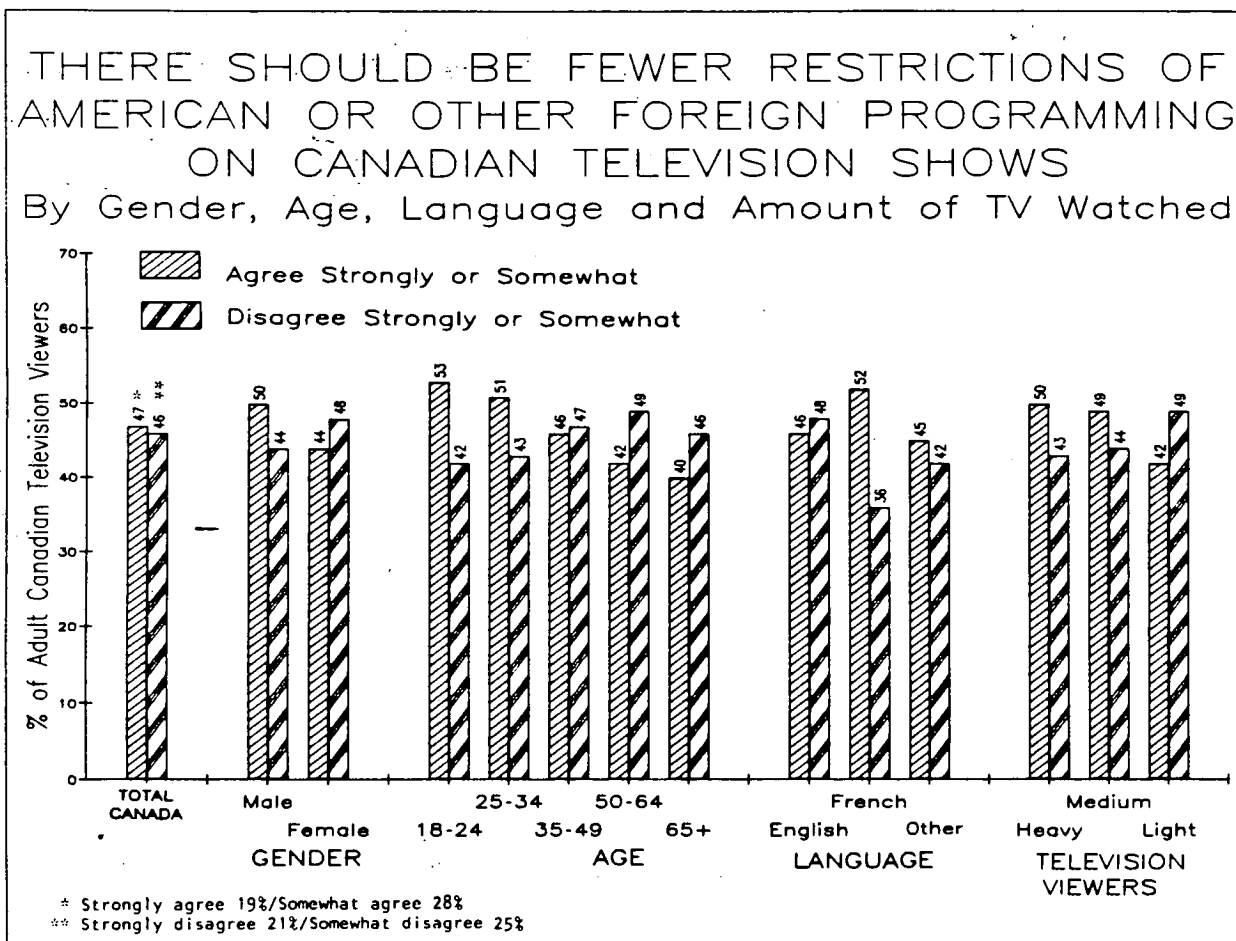
the lower end of the income and education scale tend to be more conservative in their views. The level of permissiveness increases with increasing income and education.

Concern over the amount of violence on television runs high across all socio-economic groups but, in direct contrast to attitudes about sex and illegal drugs, the level of concern is greatest among university graduates (83%).

### Restrictions on American and Other Foreign Programming

There is no consensus among Canadian television viewers on the issue of foreign programming on Canadian television stations. Almost half the viewing public (47%) agrees strongly or somewhat that there should be fewer restrictions on the amount of American and other foreign programming broadcast through Canadian channels; a similar number (46%) disagrees. And while there is slightly more support for fewer restrictions among men, young people, francophones and heavy or medium television viewers, the level of opposition is also substantial among these groups.

There is no difference in the attitudes of television viewers who regularly watch the various Canadian and American television networks.

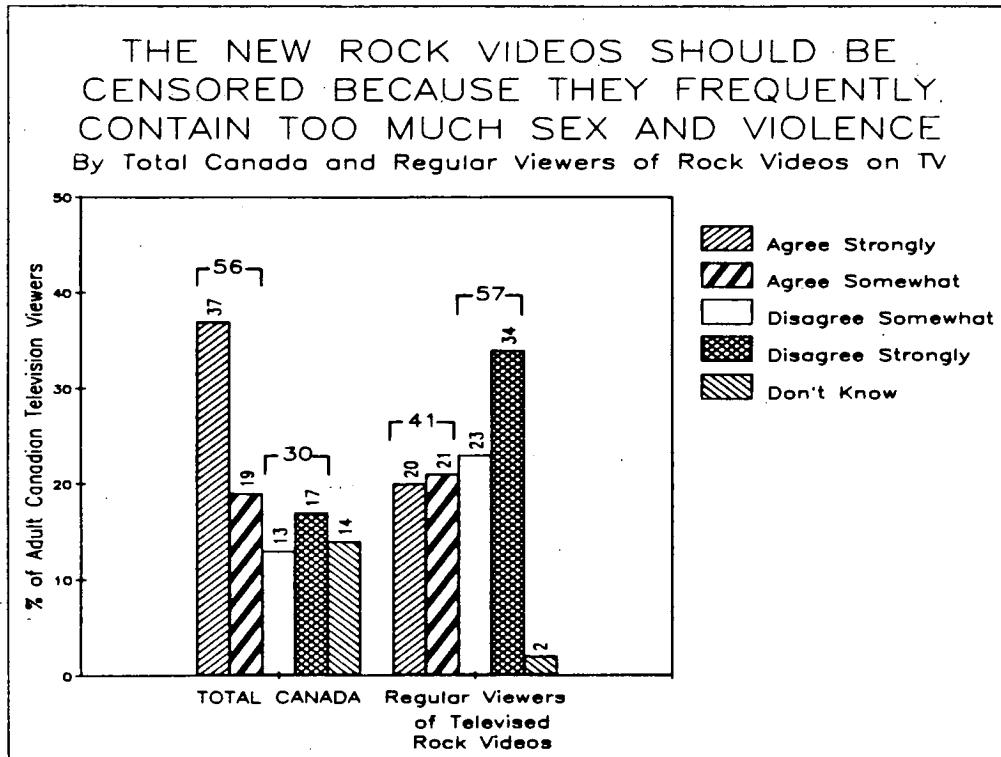


30

## Censorship of Rock Videos

Canadians are in favour of censoring rock videos by a ratio of almost 2 to 1. Among television viewers, 56 per cent agree that the new rock videos should be censored because they frequently contain too much sex or violence; 30 per cent disagree and 14 per cent have no opinion one way or the other.

Support is also fairly high among people who regularly watch rock videos. While the majority - 57 per cent - say they should not be censored, a considerable minority - 41 per cent - say they should.



## Censorship of Television in General

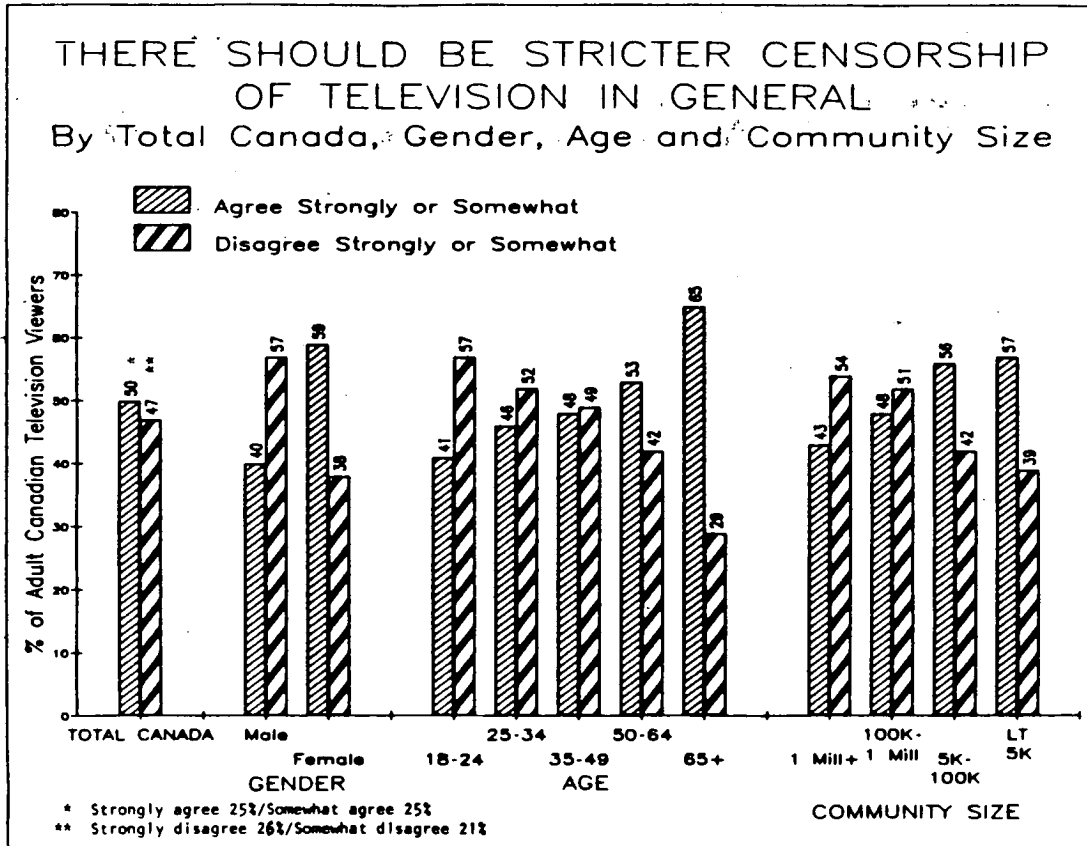
Depending on one's point of view, television censorship protects society's moral standards by screening out anti-social or improper behaviour which could have a damaging effect on all or certain segments of the viewing public; or restricts society's freedom of expression and exploration of new thoughts and ideas.

Canadians may be critical of specific aspects of television, but there is certainly no consensus for stricter censorship of the medium. Canadian viewers are, in fact, quite divided on the issue with 50 per cent in favour of stricter censorship and 47 per cent opposed.



Proponents of censorship are more likely to be people from the most vulnerable groups in Canadian society: women - particularly homemakers, those whose home language is other than English or French, the elderly, Canadians with lower levels of education and household income or living in smaller, non-urban communities.

Conversely, men, young adults, people with full-time employment outside the home, Canadians with higher levels of education and income and urban dwellers are more likely to be opposed to stricter censorship of television than to be in favour.



### Classification of Children's Programs

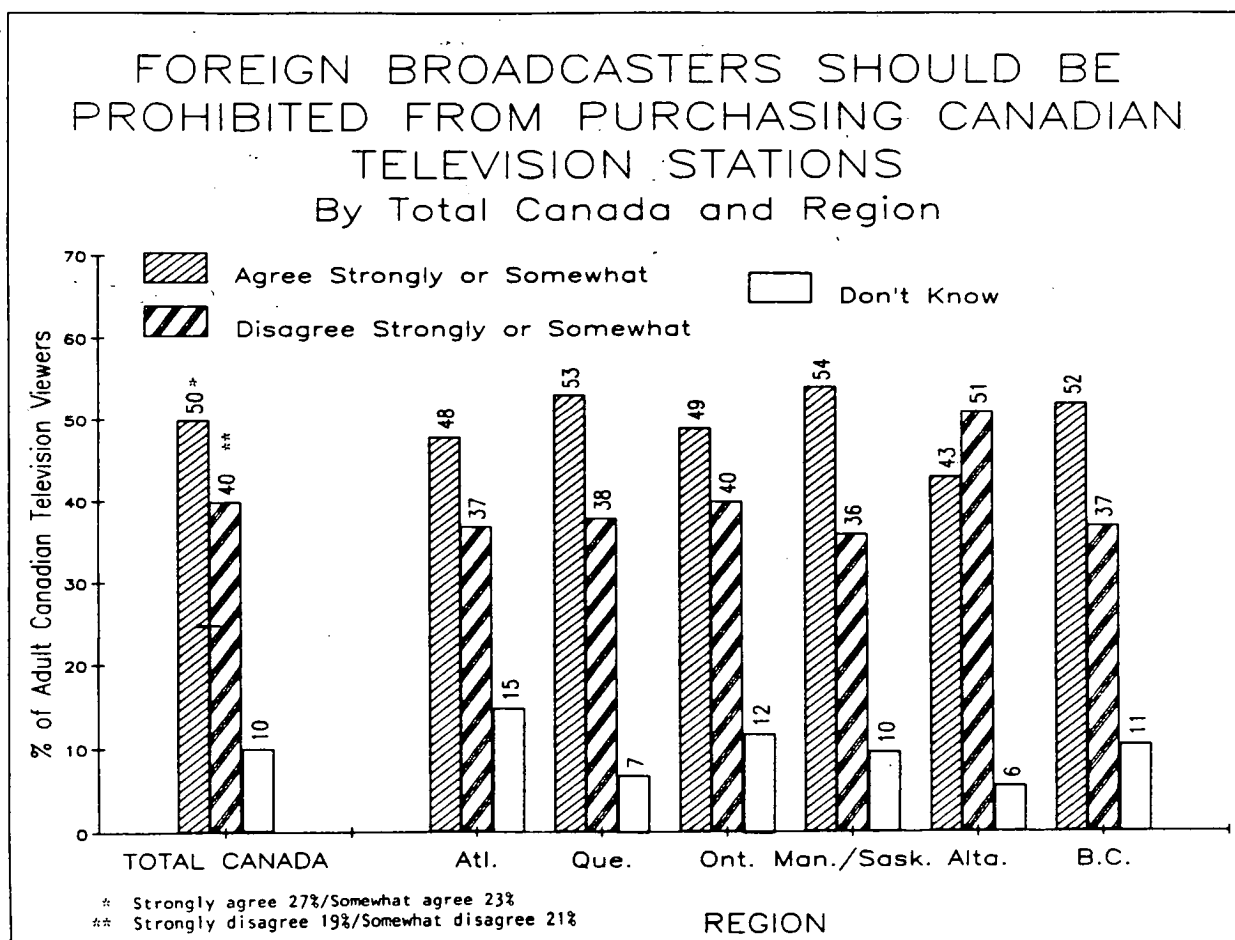
If Canadians are hesitant to endorse stricter censorship of television, they strongly support a system of information which would allow the viewing public to regulate itself. As an example, most television viewers - 87 per cent - agree that television programs should be classified according to their suitability for children; 58 per cent agree strongly.

This view is widely held and includes both parents and adults without children.

### 1.7.4 Foreign Ownership

Fifty per cent of Canadian television viewers agree that foreign broadcasters should be prohibited from purchasing Canadian television stations - 27 per cent agree strongly and 23 per cent agree somewhat. Almost as many, however, (40%) do not support the protection of Canadian television outlets from foreign ownership with 21 per cent disagreeing somewhat and 19 per cent disagreeing strongly. Ten per cent have no opinion.

To what does one attribute the apparent ambivalent mood of Canadians toward cultural nationalism? Other Environics' research shows an acceptance of foreign ownership where there is a significant benefit to Canadians in sectors where Canada's national security and sovereignty are not at risk. The divided response on the issue of foreign ownership of Canadian television stations may reflect the widespread acceptance of foreign (American) programming in this country and perhaps also the growing sentiment which supports more reliance on market forces and less reliance on government intervention in the economy.



Attitudes toward foreign ownership are consistent across all demographic groups and different types of television viewers including heavy, medium and light users and regular viewers of Canadian and American networks.

Regionally, support for prohibiting foreign ownership of Canadian television stations is lowest in Alberta (43% of Albertans are in favour; 51% are opposed).

### 1.7.5 Competition

Canadian television viewers were asked if they would like to see another local television station in their community. The majority - 53 per cent - are satisfied with the current number of television choices available to them at the local level. A sizable minority, however - 43 per cent - would like another local television outlet with almost one in four - 23 per cent - agreeing strongly.

The parts of the country which, in the opinion of viewers in those regions, are particularly underserved by existing television stations are the Atlantic provinces, where the idea of a new local station is supported by 72 per cent of television viewers, and Manitoba/Saskatchewan where 56 per cent of viewers would like another local station.

Quebecers and in particular, Montrealers, are not eager for additional local outlets at the present time. This is not surprising since a new Quebec network - Quatre Saisons - just recently came on stream in September, 1986.

Torontonians, who in addition to the national network outlets, are serviced by Global, City TV and MTV on the local level, also tend to be satisfied with the local television stations already available.

**YOU WOULD LIKE TO SEE ANOTHER LOCAL TELEVISION  
STATION IN YOUR COMMUNITY**

	<u>Agree</u> <u>Strongly</u>	<u>Agree</u> <u>Somewhat</u>	<u>TOTAL</u> <u>AGREE</u>	<u>Disagree</u> <u>Somewhat</u>	<u>Disagree</u> <u>Strongly</u>	<u>TOTAL</u> <u>DISAGREE</u>	<u>DK</u>
Total Canada	23	20	43	23	30	53	5
<b>Regions:</b>							
Atlantic	43	29	72	11	14	25	3
Quebec	22	15	37	20	40	60	3
Montreal	19	15	34	19	45	64	2
Ontario	19	20	39	26	30	56	6
Toronto	12	19	31	25	35	60	9
Man/Sask.	29	27	56	22	18	40	3
Alberta	17	23	40	31	22	53	6
B.C.	24	16	40	21	34	55	5
Vancouver	18	23	41	27	25	52	6
<b>Community Size:</b>							
1 million +	16	18	34	23	37	60	6
100,000-1 mill.	20	21	41	28	26	54	5
5,000-100,000	24	20	44	20	33	53	3
Less than 5,000	34	20	54	18	25	43	4

**1.8 Segmenting The Canadian Television Audience**

**Introduction**

This section of the Media Study report focuses on the Canadian television audience and its orientation to television. Rather than treating all television viewers as an undifferentiated mass exhibiting similar tastes and habits, the approach taken in this analysis assumes that the television audience actually is composed of a number of different audiences -- each having its own set of reasons for watching television. The notion of a segmented audience should be familiar to broadcasters because it shares the same conceptual basis as audience fragmentation and narrowcasting to specific target audiences.

**Methodology**

A random sample of 1,008 out of the 4,006 Media Study respondents was selected to answer a 12-item battery of questions concerning motivations for watching television. These questionnaire items were taken from the "Uses and Gratifications" literature - a widely accepted approach to understanding television viewing patterns that was developed in the United States during the 1970's.

Respondents taking part in this special analysis are asked how frequently they watch television:

- To learn about what is going on in the world;
- To relax;
- To fill in time gaps;
- To provide companionship;
- To act as a background while undertaking other activities;
- To find out how others deal with problems;
- To be entertained;
- To escape from personal problems;
- To learn something new;
- To have their spirits lifted;
- To get a feeling of adventure and excitement; and,
- To watch programming from multiple sources simultaneously.

Answers to these 12 items form the basis of this audience segmentation. The segments themselves are derived through a combination of multivariate statistical techniques including factor analysis, cluster analysis and discriminant analysis.

The subsample of 1,008 respondents is reweighted to be representative of the Canadian population, 18 years of age or older. The margin of error for this sample is plus or minus 3.1 per cent at the 95 per cent confidence limit. Of these respondents, 977 are television viewers.

## **The Audience Segments**

### **Introduction**

Five audience segments emerge from this segmentation analysis. These groups of television viewers vary considerably with respect to their size, demographic characteristics, reasons for watching television, amount of time spent watching television, program selection and attitudes towards television as a medium.

While other audience segmentation procedures have been based on information such as amount of television viewing or programming preferences, this particular audience segmentation emphasizes the importance of television in the lives of Canadians. For some Canadians, television plays a peripheral role that is characterized by a very selective approach to television viewing. For other Canadians, television plays a more central role involving many hours of viewing each day.

Each audience group is given a label which acts as a convenient identifier and as a method of emphasizing the principal orientation to television displayed by the members of that segment. In order of absolute size, the five television audience segments discovered in the Environics' Media Study are:

	<u>Proportion of Television Viewers</u>
1) The Discriminating Viewers	40%
2) The Passive Viewers	27
3) The Television Dependent Viewers	15
4) The Reluctant Viewers	11
5) The Entertainment Seekers	8

### **The Discriminating Viewers**

#### **Orientation to Television**

Television viewers who are discriminating in what they watch and how they use television account for the single largest segment in the Canadian audience. Four out of ten adult television viewers in Canada are classified as Discriminating Viewers.

This audience segment is described as discriminating because these viewers are selective in their approach to watching television. First, television does not dominate the leisure time of the Discriminating Viewers. Second, members of this audience segment are active in their use of television as a medium.

Discriminating Viewers principally use television as a source of information. Seventy-three per cent of Discriminating Viewers frequently watch television to learn more about what is going on in the world and 60 per cent watch television on a regular basis to learn something new. Very small percentages of Discriminating Viewers use television to provide company (4% of Discriminating Viewers) or to help forget about personal problems (2% of Discriminating Viewers).

It should also be noted, however, that Discriminating Viewers do watch television for its entertainment value. The combination of entertainment and information has a strong appeal to the Discriminating Viewers.

## Demographic Characteristics

The distinguishing demographic feature of the Discriminating Viewers is that most belong to the middle to upper-middle socio-economic ranks of Canadian society. Forty-two per cent of the Discriminating Viewers have attended a post-secondary educational institution in comparison to 34 per cent of the television viewing audience. Thirty-one per cent of employed Discriminating Viewers work in professional, managerial or administrative occupations compared to 26 per cent of the general audience. Forty-seven per cent of Discriminating Viewers earn incomes of \$30,000 or more in contrast to 44 per cent of the Canadian television audience.

Discriminating Viewers tend to live in the central regions of Canada (36% of Discriminating Viewers live in Ontario and 30% live in Quebec) and within the urban areas of these regions (60% live in communities with populations greater than 100,000). Although Discriminating Viewers are found among all age groups, they are most heavily concentrated in the 26 to 55 year old category and have the lowest concentration in the 18 to 25 year old group. Discriminating Viewers are composed of equal proportions of men and women.

The Discriminating Viewers represent the broad middle of Canada as a nation in terms of absolute numbers, socio-economic status and age. Although Discriminating Viewers are slightly better off than the average Canadian, this would correspond to the large number of post-war Baby Boomers in this audience segment who are reaching their prime income earning years.

## Television Viewing Behaviour

Of the five audience segments, Discriminating Viewers spend the second smallest amount of time watching television. On average, Discriminating Viewers spend 16 hours per week and 2.1 hours per day in front of their television sets. Forty-five per cent of the Discriminating Viewers watch television less than 10 hours per week. The amount of time that Discriminating Viewers spend watching television is congruent with their selective and critical orientation to the medium.

"What do Discriminating Viewers choose to watch on television?" Nine out of ten tune in to news and public affairs programming on a regular basis. As well, members of this audience segment exceed the national average in the frequency of their viewing of cultural programming and multicultural or ethnic programming. Discriminating Viewers watch movies, sports and children's programming with the same degree of regularity as the typical Canadian television viewer, but, they are less inclined to watch comedies, action shows, continuing drama series, soap operas and rock videos.

In comparison to the entire Canadian television audience, Discriminating Viewers are more likely to regularly tune in to Canadian and American public television networks. Fifty-seven per cent of Discriminating Viewers regularly watch the CBC English-language network, 35 per cent frequently tune in to Canadian educational television stations and 35 per cent watch PBS on a regular basis.

#### Attitudes towards Television

Less than one-half of Discriminating Viewers agree that television plays an important part in their daily life. Although television does not play a central role in the lives of most Discriminating Viewers, members of this audience segment, more than any other segment, are concerned about maintaining Canadian culture and television's role in strengthening that culture. Fifty-three per cent of Discriminating Viewers believe that Canadians should be doing more to develop a separate cultural identity from the Americans. Fifty-nine per cent agree that American television has too great an influence on the Canadian way of life. Twenty-five per cent of Discriminating Viewers, in comparison to 22 per cent of the general audience, hold the opinion the Canadian television programs are better than American programs.

Discriminating Viewers display a negative orientation towards television commercials. In contrast to the general viewing audience, Discriminating Viewers are less likely to indicate that commercials are entertaining or interesting, provide useful information or influence purchase decisions.

#### Summary

Four out of ten Canadian television viewers are classified as Discriminating Viewers. That is, members of this audience segment tend to be selective in the way they watch and use television, how much time they spend watching television and what they watch on television. When they watch television, Discriminating Viewers are particularly interested in obtaining information which can be incorporated into a personal learning experience. As well, Discriminating Viewers place a higher value on Canadian culture than other members of the television audience.

Discriminating Viewers are mostly members of the post-war Baby Boom generation that has grown up with television. This, in part, explains the critical perspective by which they view television. Discriminating Viewers are probably the most sophisticated users of television. They are able to make informed judgments about the quality of television's content and format.



## **The Passive Viewers**

### **Orientation to Television**

Passive Viewers comprise the second largest segment in the Canadian television viewing audience. Twenty-seven per cent of Canadian television viewers are classified as members of the passive television audience.

Passive Viewers treat television as a companion that helps them fill the interstices of their lives. Unlike the Discriminating Viewers who actively control their relationship with television, Passive Viewers share a relationship with television on a more mutual basis.

The distinguishing feature of the Passive Viewers is that six out of 10 frequently watch television to help fill in the time when they have nothing else to do. This percentage is almost double the national average. Furthermore, 37 per cent of Passive Viewers frequently watch television because it keeps them company, exceeding the national average by 14 per cent.

At the other extreme, relatively small percentages of Passive Viewers use television to obtain information that is incorporated into an active learning experience. One-quarter of Passive Viewers report watching television regularly to learn about what is happening in the world and 15 per cent indicate they use television to learn about new things and ideas.

Although the label Passive Viewers appears to have a negative connotation, they do not have as high degree of dependency on television as other audience segments. For example, only six per cent of Passive Viewers frequently watch television to get a feeling of adventure and excitement and six per cent watch to lift their spirits. Passive Viewers do not experience life vicariously through television, even though they frequently watch television just to pass the time.

### **Demographic Characteristics**

Passive Viewers generally are members of less affluent households and have less education than the members of other audience segments. Sixty-one per cent of Passive Viewers reside in households with incomes less than \$30,000, and 72 per cent have not attended post-secondary educational institutions.

Members of the Passive Viewers audience segment are more likely to live in small communities or rural areas of Canada than in urban or metropolitan regions. One-half of Passive Viewers live in communities with less than 100,000 residents. Of these individuals, 63 per cent live in communities of less than 5,000 people. Although the largest numbers of Passive Viewers are found in Quebec and Ontario, there are more Passive Viewers per capita in British Columbia than elsewhere in Canada.

Six in ten Passive Viewers are under 40 years of age. Moreover, there is a higher percentage of 18 to 25 year olds among the Passive Viewers than among any other audience segment. Congruent with the age distribution, there is a higher percentage of single (never married) individuals among the Passive Viewers than in the population of Canadian television viewers as a whole.

#### Viewing Behaviour

Passive Viewers, on average, spend 19 hours per week and 2.3 hours per day watching television. Passive Viewers sit in the centre of the Canadian television audience in the amount of time spent with television.

On the whole, Passive Viewers are much more entertainment-oriented than information-oriented in their television viewing habits. Passive Viewers are 11 percentage points lower than the national average with respect to the frequent viewing of news and public affairs programming. Passive Viewers like to watch movies on television, comedies, action shows and continuing drama series and are less inclined to watch sports or cultural programming.

In many respects, the Passive Viewers' selection of networks and channels is very similar to the channel selections made by the typical Canadian viewer. Passive Viewers are, however, somewhat less likely to watch the CBC English-language network and PBS. The infrequent viewing of PBS can be explained in part by the fact that some Passive Viewers are unable to receive the PBS signal.

#### Attitudes towards Television

Exactly one-half of Passive Viewers agree with the statement that television plays an important part in their daily lives. There is only one percentage point difference between the responses given by the Passive Viewers and what is found in the general audience.

Passive Viewers tend to be less concerned about Canadian culture than the typical Canadian television viewer. A smaller percentage of Passive Viewers are concerned about the need for Canadians to develop a separate cultural identity than is found in the general population (38% of Passive Viewers versus 46% of the general audience) and fewer Passive Viewers agree that American television has too great an influence on a Canadian way of life (47% of Passive Viewers versus 54% of the general audience).

The opinion of Passive Viewers towards television commercials closely mirrors what is found in the general population. Fifty-seven per cent of Passive Viewers find that television commercials provide useful information, 56 per cent find commercials entertaining and interesting and 31 per cent indicate that commercials influence their purchase decisions.

## Summary

Slightly more than one-quarter of the Canadian television viewing audience is composed of Passive Viewers who look to television as a means of filling in life's gaps. Passive television viewing, in part, can be explained by a large amount of leisure time that remains unfilled by other activities.

In many ways, Passive Viewers are typical of the Canadian television viewing public. There are greater number of similarities than differences in the viewing patterns, attitudes towards television and opinions of television commercials in comparison to the general television audience.

Passive Viewers, however, tend to be younger than other television viewers and are more likely to live in rural areas of Canada. Both factors help to explain larger amounts of unfilled leisure time. Younger, particularly single, individuals are unencumbered by family obligations; and, rural residents have fewer opportunities to pursue out-of-home leisure activities.

## Television Dependent Viewers

### Orientation to Television

Television Dependent Viewers are the third audience segment to be found in the Canadian population. Although this segment accounts for a relatively small percentage of the total Canadian television audience (15% of the Canadian audience), it is significant because of the Television Dependent Viewers' multi-faceted use of and attachment to television. It should be noted that studies of the American television audience conducted in the early 1980's have discovered similar viewers in the United States.

Television Dependent Viewers possess above average scores on 10 of the 12 television orientation dimensions and have average scores on the remaining two dimensions. In comparison to other television viewers, Television Dependent Viewers more frequently watch television to learn about something new (70% of Television Dependent Viewers frequently watch for this reason), to fill in the time when there is nothing else to do (69% of Television Dependent Viewers), to keep them company (60% of Television Dependent Viewers), to forget about personal problems (59%), to lift their spirits (57%), to get a feeling of adventure and excitement (55%) and to see how other people deal with problems (38%). Furthermore, 40 per cent of Television Dependent Viewers frequently watch more than one program simultaneously by switching channels back and forth.

The most salient feature of the Television Dependent Viewers is the variety of purposes for which the members of this audience segment use television. Television fulfills several functions including a social role, an educational role, an entertainment role and an escape function for the Television Dependent Viewer. The importance of television to members of this viewing segment is illustrated by the fact the 38 per cent of this segment say they frequently watch television to find solutions to personal problems. No more than nine per cent of any other audience segment admit to watching television for this reason.

#### Demographic Characteristics

Two demographic characteristics help to identify Television Dependent Viewers. First, Television Dependent Viewers tend to have lower socio-economic status. Second, Television Dependent Viewers are likely to have entered stages of the life cycle that are characterized by inactivity or a great deal of leisure time.

On average, Television Dependent Viewers have less formal education than the members of other audience segments. In fact, over one-half of the Television Dependent Viewers have less than a high school education. Two out of three employed Television Dependent Viewers work in lower blue collar or lower white collar occupations. Thirty-five per cent of the members of this audience segment have incomes of less than \$15,000. Nationally, 22 per cent of television viewers earn less than \$15,000 annually.

Television Dependent Viewers are overrepresented among the young and among the elderly. One-quarter of Television Dependent Viewers are less than 25 years of age and 32 per cent are more than 55 years of age. This bimodal age distribution helps to account for the fact that this audience segment contains the lowest percentage of full-time workers and the highest percentages of students and retirees. When homemakers are added to students and retired individuals, over one-half of Television Dependent Viewers does not participate in the labour force.

Three additional characteristics complete the demographic profile of the Television Dependent Viewers and help to explain the high levels of attachment to television. Two out of ten Television Dependent Viewers are either widowed, separated or divorced. This is double the national average. Also, 65 per cent of the members of this audience segment live in urban communities of 100,000 or more. Urban residents in Canada generally have access to a larger number of channels and greater variety of television programming than the residents of rural areas. Finally, 32 per cent of Television Dependent Viewers are French-speaking-exceeding the national average by seven per cent.

## Viewing Behaviour

In comparison to the other audience segments, Television Dependent Viewers would rank as one of the most avid television viewing segments. Members of this audience segment, on average, spend 24 hours per week, or one complete day per week, in front of their television sets. When Television Dependent Viewers are asked about how much time they spent watching television during the day prior to being surveyed, 30 per cent indicate more than four hours. On average, Television Dependent Viewers watch television for 3.0 hours per day.

The Television Dependent Viewer is more likely to watch the complete range of television programs than any other type of television viewer. Television Dependent Viewers exceed the national average for watching news and public affairs programming, movies, comedies, action shows, sports, continuing drama series, daytime soap operas, children's programming and rock videos. Even though members of this audience segment watch cultural programming and multicultural or ethnic programming less frequently, viewing of these program types remains at the same level as the general audience.

The omnivorous appetite for television among the Television Dependent Viewers is reflected in their selection of channels and networks. In comparison to the general audience, Television Dependent Viewers are more likely to tune to Canadian public, Canadian private, American commercial and American public networks.

## Attitudes towards Television

Three-quarters of Television Dependent Viewers regard television as an important part of their daily lives. This is 24 percentage points above the national average. This is not particularly surprising given the number of hours devoted by Television Dependent Viewers to television viewing and the range of interests that are satisfied by television.

Television Dependent Viewers present a mixed group of opinions regarding Canadian culture. First, 50 per cent of Television Dependent Viewers believe that Canadians should be doing more to develop a separate cultural identity (4% above the national average), 61 per cent hold the opinion that American television has too great an influence on the Canadian way of life (7% above the national average), 68 per cent indicate that there is not enough Canadian programs (6% above the national average) and 27 per cent believe that Canadian television programs are better than American ones (5% above the national average).

Second, and in apparent contradiction to the earlier findings, 54 per cent of Television Dependent Viewers think that there should be fewer restrictions on foreign programming shown on Canadian television stations (7% above the national average).

Television Dependent Viewers are soft cultural nationalists. Greater selection of television programs is more important to members of this audience segment. They are basically unconcerned about the national origins of television programming.

Of all the audience segments, Television Dependent Viewers have the most positive orientation towards television commercials. More than seven out of ten Television Dependent Viewers agree that television commercials are entertaining, interesting, useful and informative. Forty-three per cent of the members of this audience segment indicate that television commercials influence their consumer decisions.

### Summary

Fifteen per cent of the Canadian television audience reports that their leisure time largely revolves around television and the experience that television provides. Television is used by Television Dependent Viewers for more purposes than any other audience segment. It is likely that television programming has a profound effect on the way Television Dependent Viewers think and behave.

There is a great deal that Television Dependent Viewers like about television and very little that they dislike. Members of this audience segment would even be more satisfied with television if there were simply more television stations and programs available.

Television Dependent Viewers tend to come from lower socio-economic brackets. As well, they have entered stages of the life cycle that provide empty spaces that television readily fills.

### The Reluctant Viewers

#### Orientation to Television

The fourth audience segment to emerge from this analysis, accounting for 11 per cent of the Canadian television audience, are the Reluctant Viewers. Members of this audience segment are somewhat paradoxical in nature because they spend, on average, 12 hours per week watching television; yet, they cannot identify convincing reasons for doing so. Given their orientation to television, Reluctant Viewers might also be described by such adjectives as reserved, directed or discriminating; or, even stronger terms such as disenchanting, detached or alienated.

Reluctant Viewers have an average score on four television orientation dimensions and a below average score on the remaining eight dimensions. In contrast to typical Canadian television viewers, Reluctant Viewers rarely or never leave their television sets on while engaging in other activities (83% of Reluctant Viewers rarely or never use television as a background to other activities), use television programming to help deal with personal problems (82% of Reluctant Viewers rarely or never do this), use television to keep them company (75% rarely or never), watch more than one program simultaneously (74% rarely or never), use television to occupy time (67% rarely or never), watch television to lift their spirits (60% rarely or never) or watch television to seek adventure or excitement (55% rarely or never).

This analysis indicates that there is a small but recognizable portion of the television audience which has very little use for television. Television viewing is a peripheral activity for the Reluctant Viewers.

#### Demographic Characteristics

Reluctant Viewers come from a variety of demographic backgrounds, but, they are most strongly represented among the residents of rural communities particularly in Ontario and the Prairie provinces.

Another important characteristic of the Reluctant Viewers is that they tend to come from middle to upper - middle socio-economic background. One in four Reluctant Viewers is university-educated, one in three works in a professional or managerial occupation and one in five possesses a household income greater than \$50,000.

Over 60 per cent of Reluctant Viewers are between 26 and 55 years of age. Thirty-per cent have at least one dependent child between the ages of 6 and 12 in their household. Eighty-four per cent of Reluctant Viewers are English-speaking, while 16 per cent are French-speaking.

The demographic profile of Reluctant Viewers suggests that the group is actually composed of two smaller audience segments. The first group would appear to have little use for television because they have limited access to either signals or programming. The second group have lifestyles that preclude television from playing a significant part of their lives. The former group tends to live in rural communities, while the latter group consists mainly of individuals with higher socio-economic standing.

#### Viewing Behaviour

As noted earlier, Reluctant Viewers spend, on average, 12 hours per week watching television. On a daily basis, Reluctant Viewers average 1.6 hours in front of their television sets.

The amount of time that Reluctant Viewers spend watching television is the lowest recorded among the five audience segments. Reluctant Viewers spend 6 hours less per week and 0.7 hours less per day watching television than the typical Canadian television viewer.

As one might expect, in contrast to typical Canadian television viewers, Reluctant Viewers watch only a few types of programming frequently. Seventy-one per cent of Reluctant Viewers frequently watch news and public affairs programming, 66 per cent regularly watch comedies (equalling the national average), 63 per cent watch movies on a regular basis and 42 per cent watch sports frequently.

Reluctant Viewers differ from typical Canadian television viewers because they are more selective in their choice of television networks and stations. Fifty-six per cent of Reluctant Viewers report frequent viewing of English-language CBC and 32 per cent indicate that they frequently tune to PBS.

#### Attitudes towards Television

Only one-third of Reluctant Viewers agree with the statement that television plays an important part in their daily lives. This is 18 per cent below the national average.

Reluctant Viewers are composed of Canadians who are the least interested in doing more to develop a separate cultural identity from Americans (only 36% of Reluctant Viewers agree that more should be done to foster Canadian culture). Of all Canadian television viewers, Reluctant Viewers, however, are the least likely to agree that there should be fewer restrictions on the importation of foreign television programs (36% of Reluctant Viewers agree). Furthermore, one-half of Reluctant Viewers agree that American television has too great an influence on the Canadian way of life.

Much like the Discriminating Viewers, Reluctant Viewers do not have a positive opinion of television commercials. Less than one-half of the Reluctant Viewers find television commercials entertaining, interesting, useful or informative. Only one in three Reluctant Viewers admits that television commercials influence their consumer decisions.

#### Summary

Reluctant Viewers share a great deal in common with the Discriminating Viewers from a behavioral, attitudinal and demographic point of view. The similarity in perspective can be explained by the fact that both audience segments are part of the Canadian Baby Boom generation.



Like the Discriminating Viewers, Reluctant Viewers have grown up with television. Unlike the Discriminating Viewers, Reluctant Viewers take an even more critical approach to television as a medium, spending less time in front of their television sets and holding a more negative orientation to television. Reluctant Viewers, however, like to relax by watching television and expect to be entertained by television.

In addition to being part of the Baby Boom generation, two demographic characteristics help to identify further the Reluctant Viewers. There is a portion of the Reluctant Viewers who reside in rural areas of Canada. There is another portion of this audience segment that is characterized by socio-economic success.

### **The Entertainment Seekers**

#### **Orientation to Television**

The fifth and final segment in this analysis of the Canadian television audience accounts for a small percentage of the total viewing audience: Eight per cent of the Canadian television audience is composed of the Entertainment Seekers.

Entertainment Seekers and the Television Dependent Viewers share a strong and common attachment to television. Entertainment Seekers, however, are a "pure" type of the Television Dependent Viewer from the perspective of using television heavily for its entertainment value.

Ninety per cent of the Entertainment Seekers frequently watch television to be entertained. This finding exceeds the national average by 25 per cent. Additionally, 87 per cent of the Entertainment Seekers frequently use television to relax. In comparison, 39 per cent of the Canadian audience frequently watches television as a form of relaxation. Approximately one-half of the members of this audience segment frequently uses television to lift their spirits, to serve as a background for other activities and to satisfy their need for adventure and excitement.

#### **Demographic Characteristics**

Entertainment Seekers possess a distinct demographic profile. Approximately one-half of Entertainment Seekers lives in Ontario and two-thirds reside in medium to large communities. Sixty-four per cent of this audience segment are female and 48 per cent come from a British ethnic background. Entertainment Seekers are more heavily concentrated in the 26 to 40 age category than any other age group. Eighty-eight per cent of Entertainment Seekers are English-speaking compared to 12 per cent who are French-speaking.

There is a higher percentage of homemakers and students in this group than in any other audience segment. Of the Entertainment Seekers who participate in the labour force, nearly six in 10 hold lower white collar occupations. The family incomes reported by the Entertainment Seekers place them within the Canadian middle class.

#### Viewing Behaviour

Of all five television audience segments, the Entertainment Seekers are the heaviest television viewers. Entertainment Seekers spend, on average 25 hours per week and 2.8 hours per day watching television. The amount of time that Entertainment Seekers spend watching television exceeds the national average by 7 hours per week and 0.5 hours per day. Fifty-five per cent of the Entertainment Seekers spend more than 20 hours per week watching television.

Entertainment Seekers are above the national average with respect to watching eight of the 11 program types measured in this survey. Eighty-three per cent of the Entertainment Seekers frequently watch news and public affairs programming, 78 per cent frequently watch comedies, 76 per cent watch movies, 56 per cent watch action shows, 38 per cent watch daytime soap operas, 27 per cent watch children's programming, 18 per cent watch rock videos and 13 per cent watch multicultural or ethnic programming. Entertainment Seekers watch continuing drama series and cultural programming as often as the typical Canadian viewer. Entertainment Seekers fall below the national average in only one programming area. Forty-one per cent of the Entertainment Seekers, as opposed to 46 per cent of the general audience, frequently watch sport programming.

Compared to typical Canadian television viewers, Entertainment Seekers more frequently tune in to Canadian public, Canadian private, American public and American commercial networks. Viewing of Radio-Canada (French-language CBC), however, is lower among the Entertainment Seekers than any other audience segment.

#### Attitudes towards Television

Two-thirds of Entertainment Seekers agree that television is an important part of their daily life. This is 17 per cent above the national average. Entertainment Seekers rank second only to the Television Dependent Viewers in terms of the perceived importance of television.

Forty-five per cent of Entertainment Seekers believe that Canadians should be doing more to develop a separate cultural identity from Americans. As well, 49 per cent of Entertainment Seekers agree that American television has too great an influence on the Canadian way of life.

In spite of these opinions about Canadian culture, Entertainment Seekers do not want to see any impediments put in the way of their television viewing. Fifty-five per cent of Entertainment Seekers, as opposed to 47 per cent of Canadian television viewers, think that there should be fewer restrictions on the number of American and foreign programs that can be shown by Canadian television stations. At least one contributing factor to holding this opinion about the greater availability of foreign programming is that only 12 per cent of Entertainment Seekers think that Canadian television programs are better than American ones.

Entertainment Seekers have a very positive attitude towards television commercials. Seventy per cent of Entertainment Seekers find television commercials entertaining and interesting, while 66 per cent find them useful and informative. Thirty-six per cent of the members of this audience segment admit that television commercials influence the purchase decisions.

#### Summary

Entertainment Seekers are a small but distinctive part of the Canadian television audience. Members of this audience segment hold a very positive attitude towards television.

Entertainment Seekers are very similar to the Television Dependent Viewers regarding their orientation to and use of television. Entertainment Seekers, however, focus more closely on the entertainment content of television.

While Entertainment Seekers are very close to the Television Dependent Viewers, they are the antithesis of two other audience segments. Reluctant Viewers and Discriminating Viewers anchor one end of the television viewing continuum and the Entertainment Seekers and the Television Dependent Viewers anchor the other extreme. Passive Viewers lie near the middle of this continuum.

The Entertainment Seekers audience segment is the only one in which women outnumber men by an appreciable proportion. Furthermore, Entertainment Seekers tend to live in Central Canada and in urban communities.

**DEMOGRAPHIC CHARACTERISTICS  
OF DISCRIMINATING VIEWERS**

	<u>Total Canadian Television Viewers</u>	<u>Discriminating Viewers</u>
<u>Gender</u>		
Male	50	52
Female	50	48
<u>Age</u>		
18-25	21	15
26-40	34	36
41-55	20	23
55+	26	26
<u>Education</u>		
Lt. high school	37	31
High school	30	28
Community College	17	18
University	18	23
<u>Household Income</u>		
Lt \$15K	22	20
\$15K - \$30K	34	33
\$30K - \$50K	30	31
\$50K +	14	16
<u>Occupation</u>		
Prof/Manager	26	31
Clerical/sales/service	42	40
Skilled	15	16
Semi-skilled, unskilled	17	13
<u>Region</u>		
Atlantic	8	6
Quebec	27	30
Ontario	36	36
Prairies	17	17
B.C.	12	11
<u>Community Size</u>		
1 Million +	31	34
100K - 1 Million	28	27
5K - 100K	16	16
Lt 5K	26	24
<u>Language</u>		
English	75	73
French	25	27

**DEMOGRAPHIC CHARACTERISTICS  
OF PASSIVE VIEWERS**

	<u>Total Canadian Television Viewers</u>	<u>Passive Viewers</u>
<b><u>Gender</u></b>		
Male	50	49
Female	50	51
<b><u>Age</u></b>		
18-25	21	26
26-40	34	32
41-55	20	15
55+	26	27
<b><u>Education</u></b>		
Lt High School	37	39
High School	30	33
Community College	17	15
University	18	13
<b><u>Household Income</u></b>		
Lt \$15K	22	24
\$15K - \$30K	34	37
\$30K - \$50K	30	29
\$50K +	14	10
<b><u>Marital Status</u></b>		
Single	23	26
Married	65	65
Widowed/Separated/Divorced	12	9
<b><u>Region</u></b>		
Atlantic	8	9
Quebec	27	27
Ontario	36	35
Prairies	17	14
B.C.	12	14
<b><u>Community Size</u></b>		
1 Million +	31	26
100K - 1 Million	28	25
5K - 100K	16	18
Lt 5K	26	31
<b><u>Language</u></b>		
English	75	74
French	25	26

**DEMOGRAPHIC CHARACTERISTICS  
OF TELEVISION DEPENDENT VIEWERS**

	<u>Total Canadian Television Viewers</u>	<u>Television Dependent Viewers</u>
<u>Gender</u>		
Male	50	56
Female	50	44
<u>Age</u>		
18-25	21	25
26-40	34	24
41-55	20	18
55+	26	32
<u>Education</u>		
Lt high school	37	52
High school	30	30
Community College	17	12
University	18	6
<u>Household Income</u>		
Lt \$15K	22	35
\$15K - \$30K	34	36
\$30K - \$50K	30	19
\$50K +	14	11
<u>Working Status</u>		
Work full-time	44	34
Work part-time	16	14
Full-time student	4	6
Homemaker	12	15
Unemployed, Laid off	10	15
Retired	15	17
<u>Occupation</u>		
Prof/manager	26	17
Clerical/sales/service	42	35
Skilled	15	14
Semi-skilled, unskilled	17	34
<u>Marital Status</u>		
Single	23	27
Married	65	51
Widowed/Separated/Divorced	12	22
<u>Community Size</u>		
1 Million +	31	34
100K - 1 Million	28	30
5K - 100K	16	15
Lt 5K	26	20
<u>Language</u>		
English	75	69
French	25	32

**DEMOGRAPHIC CHARACTERISTICS  
OF RELUCTANT VIEWERS**

	<u>Total Canadian Television Viewers</u>	<u>Reluctant Viewers</u>
<u>Gender</u>		
Male	50	53
Female	50	47
<u>Age</u>		
18-25	21	19
26-40	34	36
41-55	20	25
55+	26	20
<u>Education</u>		
Lt high school	37	35
High school	30	29
Community college	17	10
University	18	26
<u>Household Income</u>		
Lt \$15K	22	11
\$15K - \$30K	34	35
\$30K - \$50K	30	35
\$50K +	14	19
<u>Occupation</u>		
Prof/manager	26	34
Clerical/sales/service	42	39
Skilled	15	12
Semi-skilled, unskilled	17	15
<u>Region</u>		
Atlantic	8	8
Quebec	27	21
Ontario	36	35
Prairies	17	25
B.C.	12	11
<u>Community Size</u>		
1 million +	31	30
100K - 1 million	28	29
5K - 100K	16	9
Lt 5K	26	32
<u>Dependent Children</u>		
None	84	70
One or more	16	30
<u>Language</u>		
English	75	84
French	25	16

54

**DEMOGRAPHIC CHARACTERISTICS  
OF ENTERTAINMENT SEEKERS**

	<u>Total Canadian Television Viewers</u>	<u>Entertainment Seekers</u>
<u>Gender</u>		
Male	50	36
Female	50	64
<u>Age</u>		
18-25	21	23
26-40	34	40
41-55	20	21
55+	26	16
<u>Household Income</u>		
Lt \$15K	22	17
\$15K - \$30K	34	26
\$30K - \$50K	30	40
\$50K +	14	17
<u>Working Status</u>		
Work full-time	44	49
Work part-time	16	13
Full-time student	4	6
Homemaker	12	18
Unemployed, laid off	10	6
Retired	15	7
<u>Occupation</u>		
Prof/manager	26	28
Clerical/sales/service	42	56
Skilled	15	7
Semi-skilled, unskilled	17	10
<u>Region</u>		
Atlantic	8	6
Quebec	27	17
Ontario	36	47
Prairies	17	23
B.C.	12	7
<u>Community Size</u>		
1 Million +	31	30
100K - 1 Million	28	36
5K - 100K	16	18
Lt 5K	26	16
<u>Ethnicity</u>		
British	39	48
French	21	19
Other European	15	13
Other	25	20
<u>Language</u>		
English	75	88
French	25	12



**SCORES ON ORIENTATION TO TELEVISION ITEMS**

**How Frequently Watch Television to:**

	<u>Learn About What is Going On in the World</u>	<u>Relax</u>	<u>Fill in Time Gaps</u>	<u>Provide Companion- ship</u>	<u>Act as Background for Other Activities</u>	<u>Find How Others Deal with Problems</u>	<u>Be Entertained</u>	<u>Escape from Personal Problems</u>	<u>Learn Something New</u>	<u>Have Spirits Lifted</u>	<u>Get Advent/ Excite.</u>	<u>Watch Multi- ple Prgms.</u>
<b>Discriminating Viewers</b>	+	-	-	-	0	0	0	-	+	-	-	0
<b>Passive Viewers</b>	-	0	+	+	0	-	0	0	-	0	-	0
<b>Television Dependent Viewers</b>	0	+	++	++	0	++	+	++	+	+	+	+
<b>Reluctant Viewers</b>	-	--	-	--	--	-	--	0	-	-	0	0
<b>Entertainment Seekers</b>	0	+	0	+	++	0	+	0	0	+	+	0

**Scores:**

- ++ well above average**
- + average**
- 0 average**
- below average**
- well below average**

76

**NETWORK VIEWING PATTERNS  
OF AUDIENCE SEGMENTS**

	<u>Total Population</u>	<u>Discriminating Viewers</u>	<u>Passive Viewers</u>	<u>Television Dependent Viewers</u>	<u>Reluctant Viewers</u>	<u>Entertainment Seekers</u>
<b>Proportion of Television Audience:</b>		40%	27%	15%	11%	8%
<b>Canadian Networks</b>						
CBC (English)	55	57	48	57	56	59
Radio-Canada (French)	21	24	20	29	14	11
Private networks	76	73	74	86	72	78
Educational TV	32	35	30	36	18	36
<b>American Networks</b>						
American Commercial Networks	61	60	60	66	56	72
PBS (Public Broad- casting System)	31	35	21	36	32	33

Note: This table refers to a subsample.

**PROGRAMMING PREFERENCES OF AUDIENCE SEGMENTS:**

<u>Frequently Watch:</u>	<u>Total Population</u>	<u>Discriminating Viewers</u>	<u>Passive Viewers</u>	<u>Television Dependent Viewers</u>	<u>Reluctant Viewers</u>	<u>Entertainment Seekers</u>
Proportion of Television Audience:		40%	27%	15%	11%	8%
News and public affairs	55	57	48	57	56	59
Movies	72	71	74	78	63	76
Comedies	65	58	68	71	66	79
Action shows	48	39	53	65	37	56
Sports	46	46	41	57	42	41
Continuing series/drama	40	35	46	51	29	39
Daytime soap operas	24	18	27	34	8	38
Cultural programming	24	29	18	23	21	22
Children's programming	21	18	22	26	17	27
Rock videos	14	9	15	30	8	18
Multicultural programming	11	13	10	10	8	13

Note: This table refers to a subsample.

58

VIEWING PATTERNS OF AUDIENCE SEGMENTS

<u>Frequently Watch:</u>	<u>Total Population</u>	<u>Discriminating Viewers</u>	<u>Passive Viewers</u>	<u>Television Dependent Viewers</u>	<u>Reluctant Viewers</u>	<u>Entertainment Seekers</u>
Proportion of Television Audience:		40%	27%	15%	11%	8%
<u>Hours Per Week</u>						
1-10 hours	38	45	32	23	57	25
11-15 hours	16	19	17	11	15	10
16-20 hours	15	13	17	16	14	11
More than 20 hours	32	23	34	50	14	55
Average # of hours	18	16	19	24	12	25
<u>Hours of Viewing Yesterday</u>						
Did not watch	19	19	21	14	25	14
1/2 - 2 hours	33	39	29	19	41	27
2-4 hours	29	25	30	37	27	30
More than 4 hours	19	17	19	30	7	29
Average # of hours	2.3	2.1	2.3	3.0	1.6	2.8

Note: This table refers to a subsample.

54

**SELECTED ATTITUDES TOWARDS TELEVISION  
BY AUDIENCE SEGMENTS**

<u>Agreement With:</u>	<u>Total Population</u>	<u>Discriminating Viewers</u>	<u>Passive Viewers</u>	<u>Television Dependent Viewers</u>	<u>Reluctant Viewers</u>	<u>Entertainment Seekers</u>
Proportion of Television Audience:		40%	27%	15%	11%	8%
TV is an important part of daily life	55	57	48	57	56	59
There should be stricter censorship of TV	51	48	56	54	52	47
Canadians are paying too little for the CBC	11	13	7	10	14	9
Would like another local TV station	45	43	42	55	36	56

Note: This table refers to a subsample.

60

**SELECTED ATTITUDES TOWARDS TELEVISION AND CANADIAN CULTURE  
BY AUDIENCE SEGMENTS**

<u>Agreement With:</u>	<u>Total Population</u>	<u>Television</u>				
		<u>Discriminating Viewers</u>	<u>Passive Viewers</u>	<u>Dependent Viewers</u>	<u>Reluctant Viewers</u>	<u>Entertainment Seekers</u>
Proportion of Television Audience:		40%	27%	15%	11%	8%
Canadians should be doing more to develop a separate cultural identity from Americans	46	53	38	50	36	45
There should be fewer restrictions on foreign programs	47	47	45	54	36	55
American TV has too great an influence on the Canadian way of life	54	59	47	61	50	49
Canadian TV programs are better than American programs	22	25	20	27	22	12

Note: This table refers to a subsample.

61

**SELECTED ATTITUDES TOWARDS TELEVISION COMMERCIALS  
BY AUDIENCE SEGMENTS**

<u>Agreement With:</u>	<u>Total Population</u>	<u>Discriminating Viewers</u>	<u>Passive Viewers</u>	<u>Television Dependent Viewers</u>	<u>Reluctant Viewers</u>	<u>Entertainment Seekers</u>
Proportion of Television Audience:		40%	27%	15%	11%	8%
TV commercials are entertaining and interesting	55	48	56	72	46	70
TV commercials influence purchase decisions	33	31	31	43	28	36
TV commercials provide useful information	57	49	57	75	49	66

Note: This table refers to a subsample.

*62*

## 2.0 RADIO

### 2.1 Overview

Radio is the second most universal medium in Canada, after television. Environics' Media Study found that 90 per cent of all adult Canadians listen to at least some radio in an average week and 77 per cent listened to radio yesterday.

### 2.2 Heavy, Medium and Light Radio Listeners

Using the same criterion applied to television viewers, radio listeners were asked to estimate the number of hours they personally spend listening to radio in an average week. The total sample was then divided into three roughly equal groups. In this report, radio users are defined as:

<u>Radio User Type:</u>	<u>Estimated # of Hours Per Week</u>	<u>Average # of Hours Per Week</u>
Heavy listeners	21 hours or more	40.9
Medium listeners	8 to 20 hours	13.6
Light listeners	1 to 7 hours	4.0

The number of hours that radio listeners estimate that they spend with radio, on average, is only slightly below the average number of hours that television viewers say they spend with television. Heavy radio listeners spend more time with radio; but medium and light radio users spend less time with radio than the medium and light television user segments spend with television.

Radio listening, unlike television viewing, tends to be skewed toward younger and more financially independent adult Canadians. Ninety-five per cent of young people age 18 to 24 and over 90 per cent of adults aged 25 to 64 say they listen to radio compared with only 80 per cent of seniors, aged 65 and over who tune in. Seniors are television's heaviest user group.

While the unemployed and full-time workers are equally likely to listen to some radio, full-time workers report that they spend more time, on average, with radio than do the unemployed. The reverse is true for television.

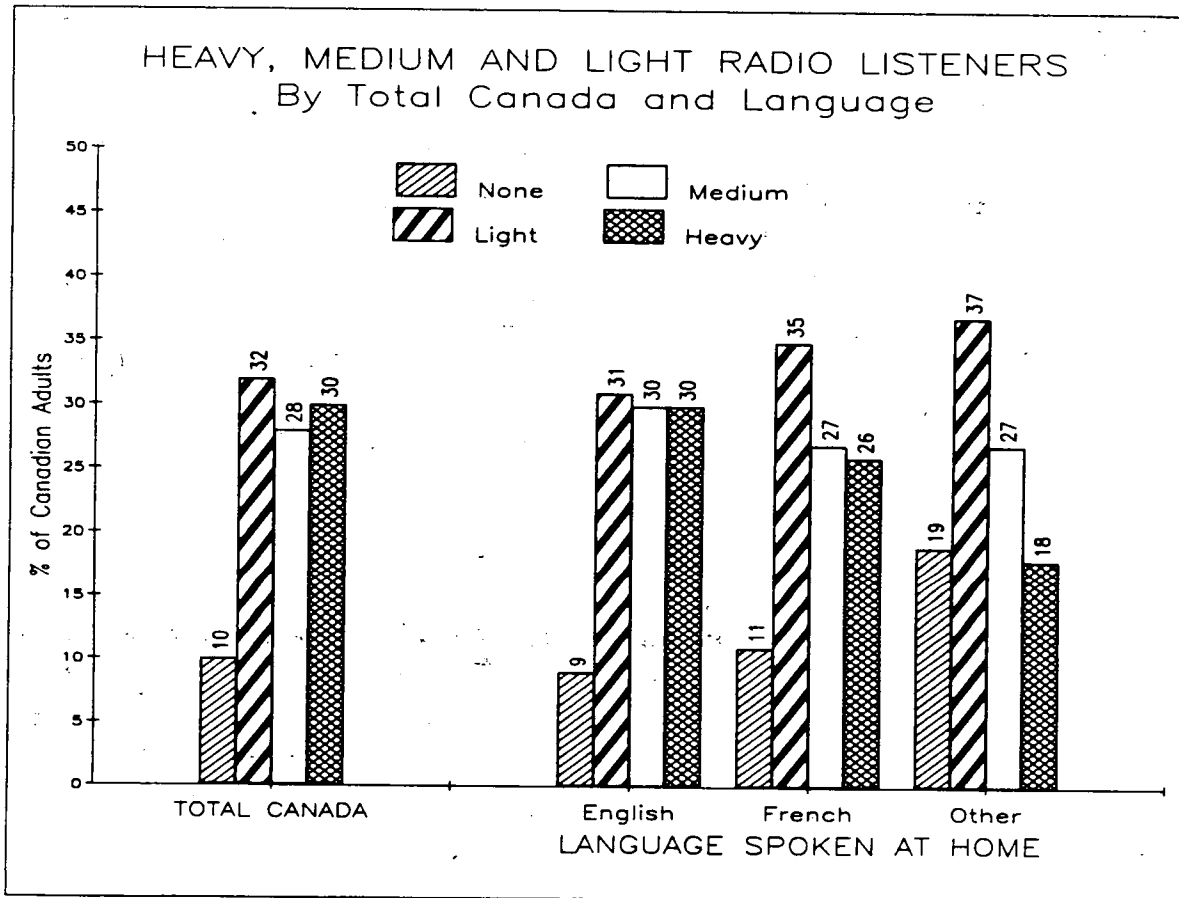
Fifteen per cent of homemakers never listen to radio compared with only eight per cent of working women. Similarly, 14 per cent of those with household incomes below \$15,000 and 13 per cent of Canadians with less than high school education do not listen to radio compared with three per cent of people with household incomes above \$50,000 and six per cent of university graduates.



Time spent with radio is not subject to the same fluctuations across demographic groups as television. The proportion of heavy, medium and light listeners is fairly consistent across most demographic groups with only minor variations in the average amount of time spent. Those who claim to spend somewhat less time listening to radio than the population in general include:

- university graduates
- parents of pre-school aged children
- Quebecers living outside Montreal

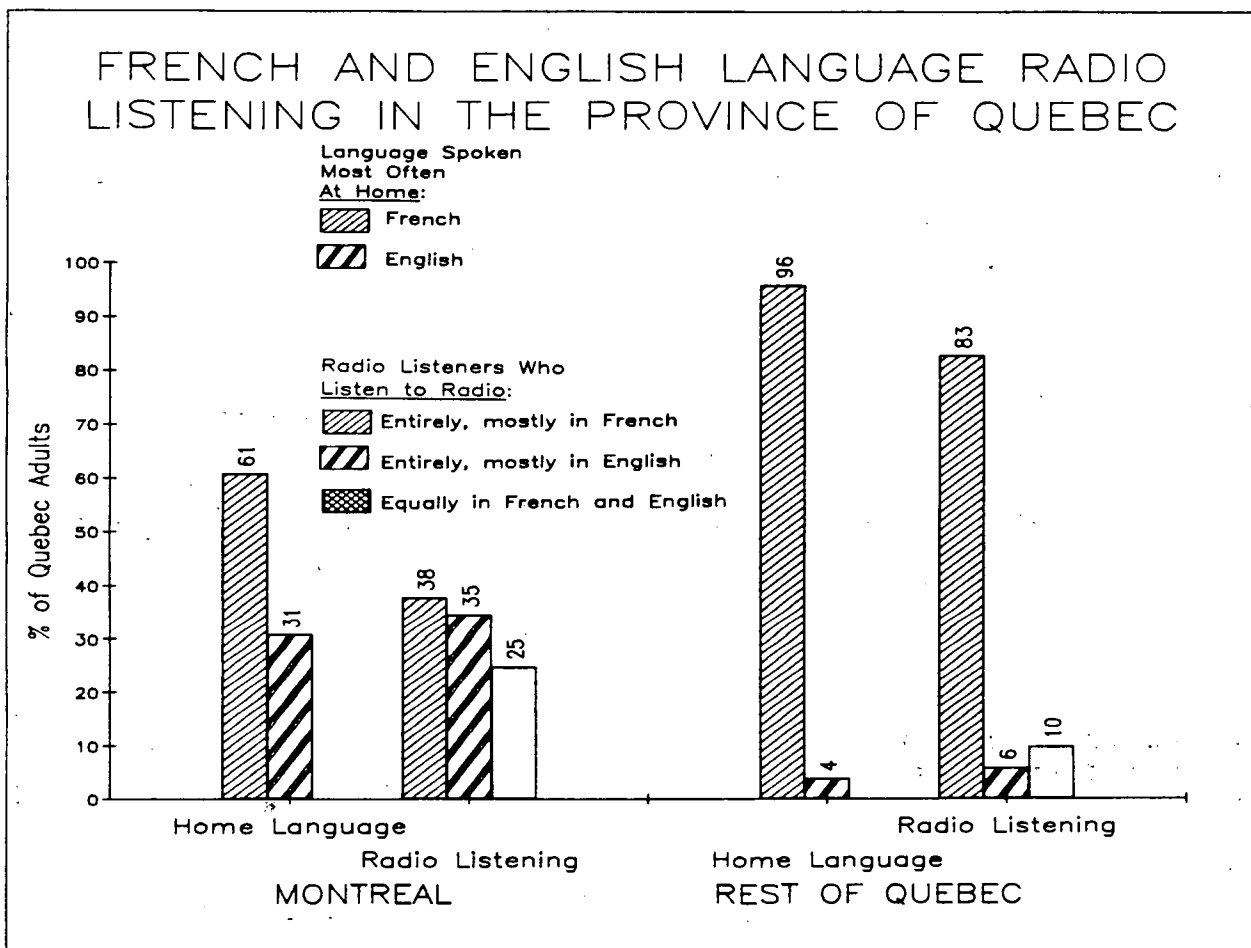
Anglophones tend on average to listen to slightly more radio than francophones, although this applies more to francophones living outside Montreal. Canadians whose home language is neither English nor French, however, are more inclined to listen to no radio at all and estimate that they spend, on average, approximately five hours less per week with radio than other Canadian adults.



64

### 2.3 English, French and Multilingual Radio

The majority of francophones - 72 per cent - report that they listen to French language radio all or most of the time. Within the province of Quebec, excluding Montreal, 83 per cent of Quebecers say they listen primarily to French language radio broadcasts. In Montreal, where the lines are blurred between English and French radio stations since some English stations play recordings by French artists and French stations feature English artists, the incidence of cross listening is higher. Thirty-eight per cent of Montreal radio listeners tune in mostly to French programming, 35 per cent tune in mostly to English programming, and 25 per cent listen equally to English and French radio.



Among radio users whose home language is other than English or French, 13 per cent listen to "other language" radio programming at least some of the time; six per cent listen to it almost exclusively. Canadians who tune in to "other language" radio are more likely to live in Toronto than in other major urban centres or regions of the country.

**% of Adult Canadian Radio  
Listeners Whose Predominant  
Home Language Is:**

	<u>English</u>	<u>French</u>	<u>Other</u>
<b>Radio Users Who Listen to Radio:</b>			
Entirely/mostly in English	98	13	73
Entirely/mostly in French	*	72	5
Equally in English and French	2	15	8
Entirely/mostly in another language	--	--	6
Equally in English and another language	*	--	6
Equally in French and another language	--	1	1

\* = less than 0.5%

#### 2.4 Public, Private and American Radio Stations

When Canadian radio listeners are asked which of the following radio stations they tune in to on a regular basis, 28 per cent say they listen regularly to English language CBC radio, 12 per cent to CBC's French language station - Radio-Canada, 87 per cent to other Canadian radio stations and 14 per cent to American radio stations.

While all Canadians have access to radio, CBC and Radio-Canada are this country's only national radio networks.

#### CBC (English)

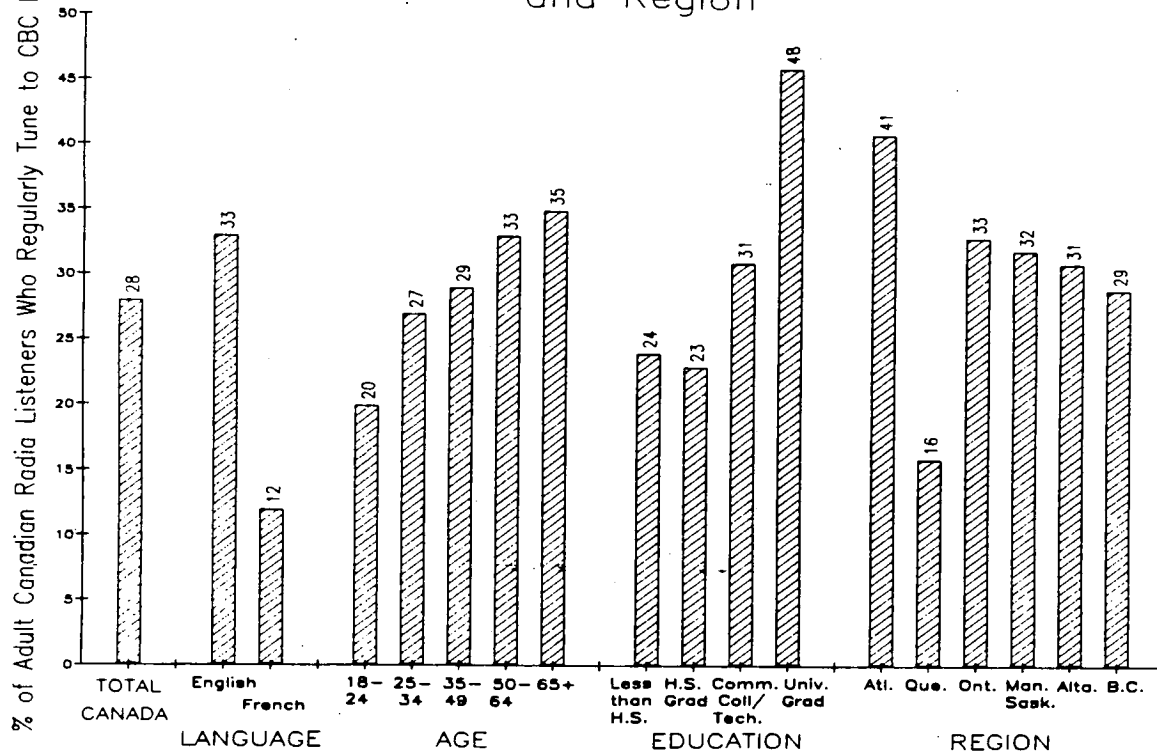
One-third of English speaking and 12 per cent of French speaking radio listeners regularly tune in to English language CBC radio. Forty-two per cent of radio listeners whose home language is other than English or French also say they regularly listen to CBC.

The CBC audience is skewed toward older listeners and those who have attained higher levels of education. Almost half of all university graduates say that they frequently listen to CBC radio and as such, are the CBC's most dedicated group of listeners. CBC's regular listeners are fairly evenly distributed across all income groups, however, and only represent a somewhat smaller share of those with household incomes below \$15,000.

66

## REGULAR LISTENERS TO ENGLISH LANGUAGE CBC RADIO

By Total Canada, Language, Age, Education  
and Region



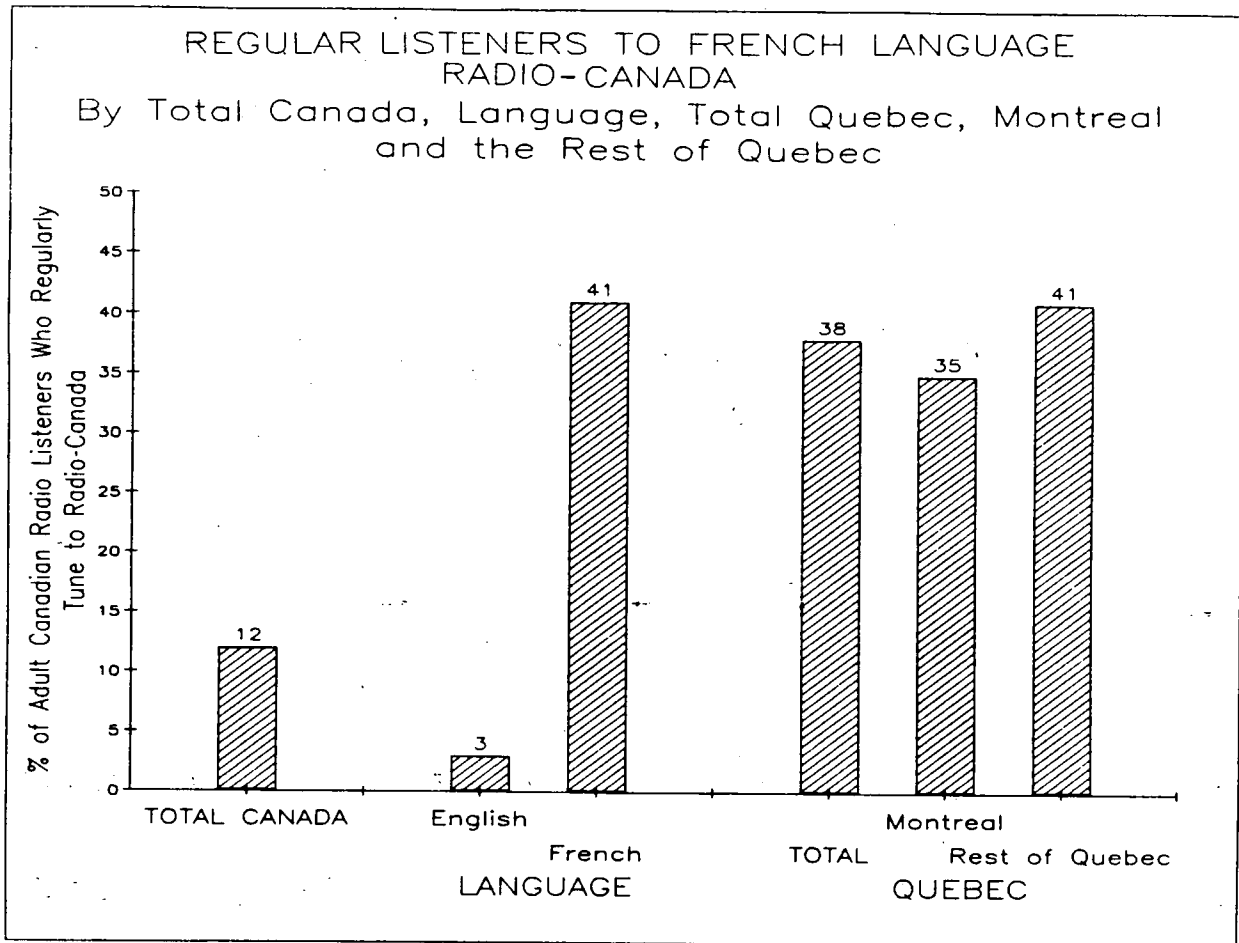
In terms of regional distribution, CBC's share of the total listening public is highest in the Atlantic provinces where 41 per cent say they regularly listen to CBC radio. In Quebec, 25 per cent of the listening audience in Montreal and nine per cent of the audience in other parts of the province regularly tune in to English language CBC radio.

### Radio-Canada (French)

Radio-Canada, CBC's French language radio station, attracts 41 per cent of all francophones on a regular basis, three per cent of anglophones and ten per cent of "other" radio listeners. Radio-Canada listeners are modestly skewed toward the "middle" age groups - 35 to 64 - and university graduates, although the percentage differences among these various groups are small.

Radio-Canada's main audience base is in the province of Quebec where 35 per cent of Montreal radio listeners and 41 per cent of listeners in other parts of the province say that they regularly tune in. Outside Quebec, between two and four per cent of the total listening audience indicate that they frequently listen to Radio-Canada.

67



### Other Canadian Radio Stations

Hundreds of stations, each with individual personalities and program formats, fall within the category of "other Canadian radio stations." Overall, 87 per cent of the total listening public say that they regularly listen to Canadian radio stations other than the CBC or Radio-Canada.

On a regional basis, regular tuning in to "other" stations is highest in Manitoba/Saskatchewan (93% of radio listeners) and lowest in the Maritimes and Quebec (81% and 84% of radio listeners respectively). Of the three major urban centres measured separately in this study, Toronto has the highest incidence of "other" regular listeners (92%), followed by Vancouver (89%) and then, Montreal (84%).

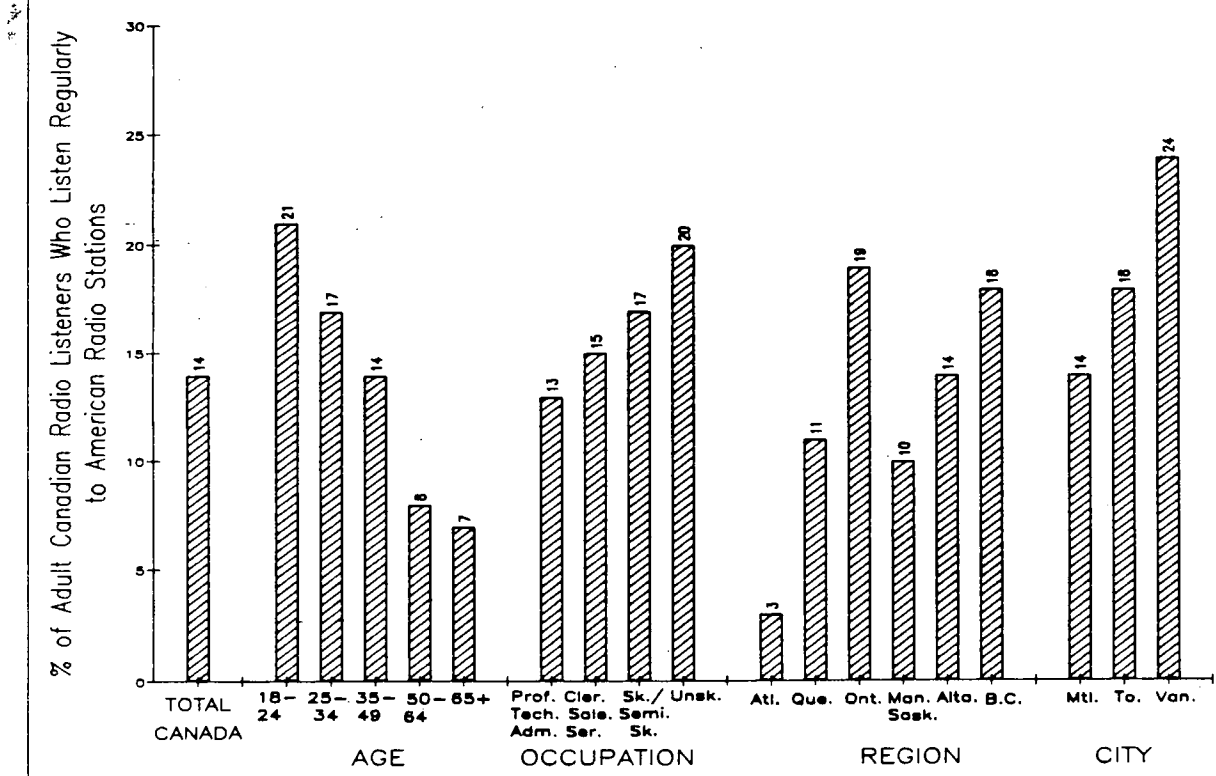
## American Radio Stations

Canadians' access to U.S. stations is mostly a question of geography. Certain American border cities such as Buffalo or Seattle have broadcast reaches which extend into Canada. The largest audience for U.S. radio, therefore, tends to be in Ontario and British Columbia. The highest penetration is in Vancouver where one in four of all radio listeners regularly tune in to American radio stations.

U.S. stations particularly attract young people, blue collar workers and radio listeners with some post-secondary community or technical college training.

Anglophones are more apt to listen to American stations than francophones, and men and working women more than homemakers.

AUDIENCE FOR AMERICAN RADIO STATIONS  
By Total Canada, Age, Occupation, Region and  
Major Urban Centres



69

## 2.5 Popularity of Different Types of Radio Programs

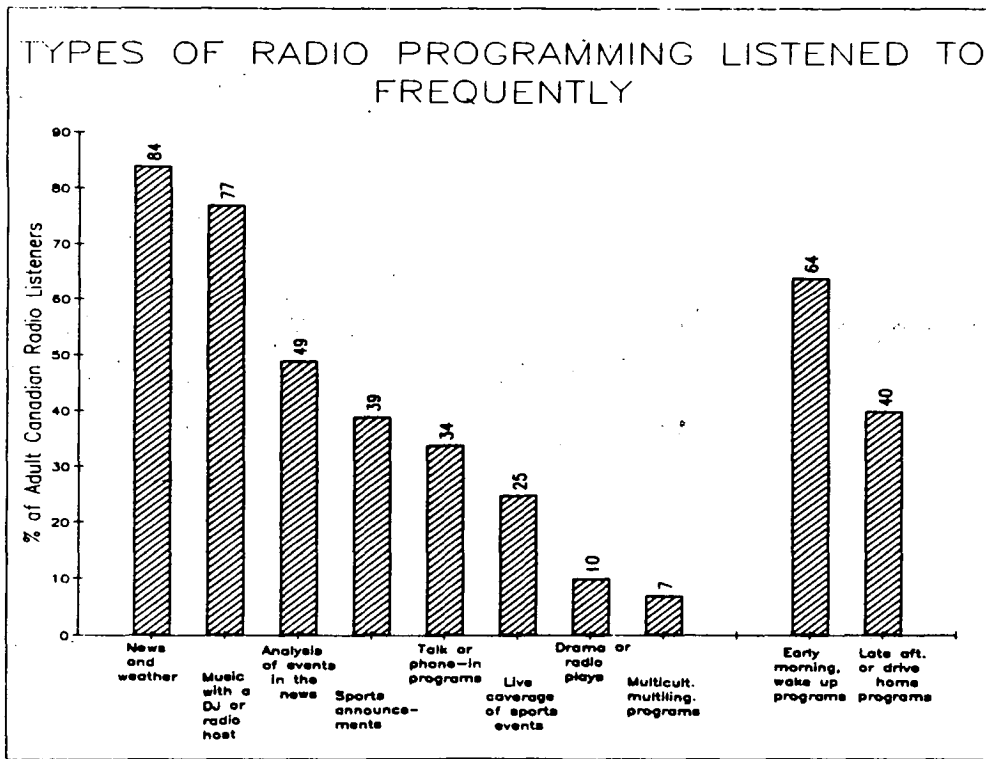
The largest single number of Canadians turn to radio for the news. Eighty-four per cent of all adult listeners regularly listen to news and weather reports on the radio. This is almost identical to the number of television viewers who regularly watch news and public affairs broadcasts.

Radio is also the medium for listening to music. After the news, music hosted by a disc jockey or radio announcer is the most popular type of program format and attracts 77 per cent of radio listeners on a regular basis.

Other program types which appeal to a substantial minority of radio listeners include: analysis of events in the news (49%), sports announcements (39%), talk or phone-in shows (34%), and live coverage of sports events (25%).

One in ten radio listeners (10%) say they regularly tune in to radio plays and seven per cent frequently listen to multicultural or multilingual programs.

Early morning wake-up shows and late afternoon or drive home shows are types of programs which are pegged to specific times of day. Of the two, early morning wake-up shows have a wider audience with 64 per cent of radio listeners who say they regularly tune to this type of programming versus 40 per cent who listen to late afternoon or drive home shows.

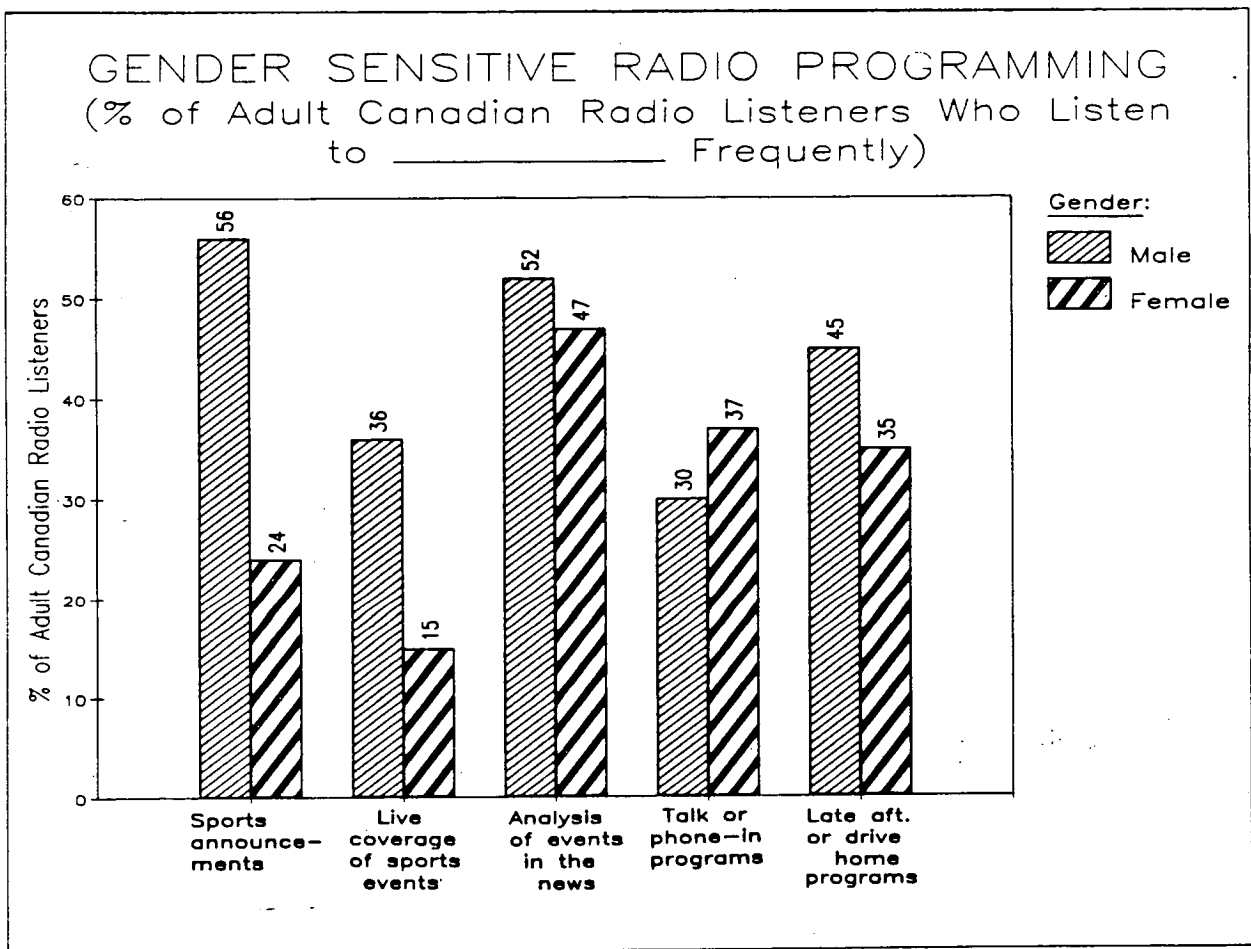


70

Radio is less sensitive than television to gender related preferences. In most instances, different program types have equal appeal to both men and women. The main exception is in the area of sports – both sports announcements and live coverage of sports events – where more than twice as many men as women tune in on a regular basis.

Men are also modestly more inclined than women to listen to radio programs which analyze events in the news while women are somewhat more attracted than men to talk or phone-in shows.

Men and women equally listen to "wake up" radio but men are more likely to be part of the late afternoon or drive home radio audience.



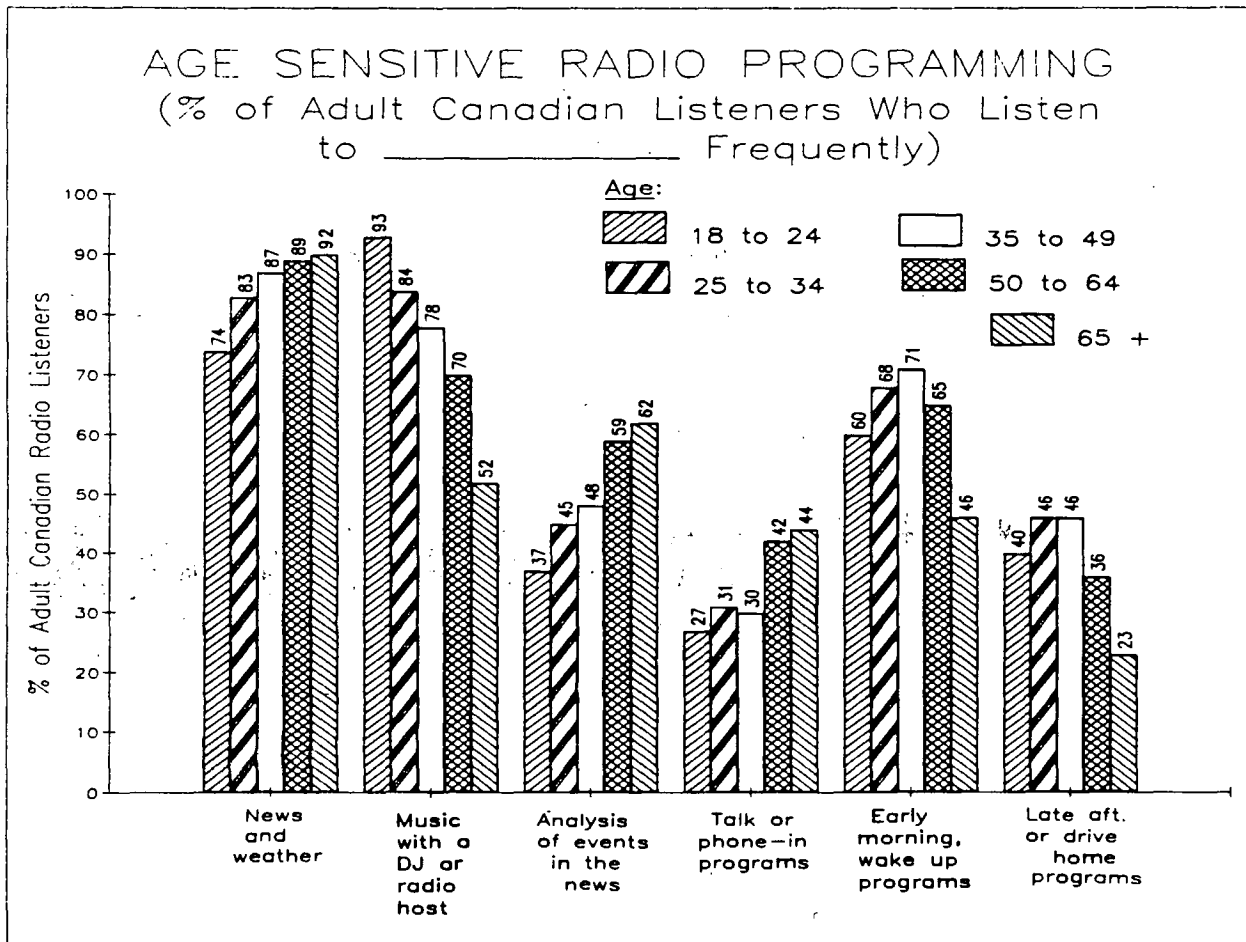


Age is an important discriminator in defining program tastes. While the majority of radio listening young people (74%) do listen to news and weather reports, the incidence of listening increases with age to a high of 90 per cent among radio listeners aged 65 and over.

The dichotomy between the young and the old is even more dramatic in the area of in-depth news analysis, where only 37 per cent of 18 to 24 year olds regularly listen to this type of radio programming versus 62 per cent of the 65 and over age group.

Young people and radio music go hand in hand - a finding which is no surprise to radio programmers. Virtually all radio listeners in the 18 to 24 age segment (93%) regularly listen to music with a DJ or radio host. The incidence of listening to radio music declines with increasing age but tumbles most significantly after age 64.

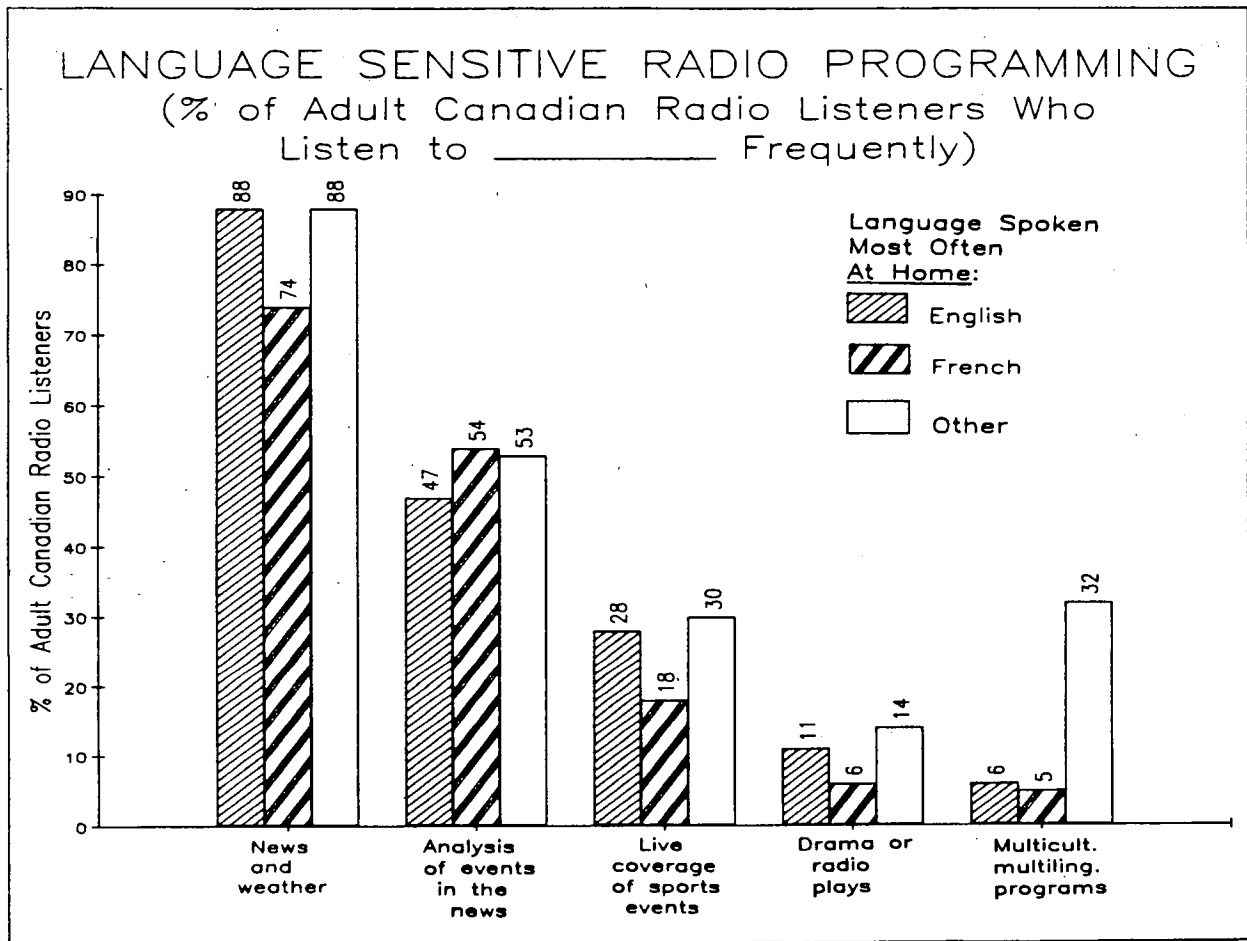
Other age sensitive radio programming includes talk or phone-in shows which are considerably more popular among radio listeners aged 50 and over. The popularity of early morning or late afternoon radio programs, on the other hand, peaks with the Baby Boom generation, aged 25 to 49.



72

Differences in program preferences among English and French speaking radio listeners are minor. Anglophones tend to favour news and weather reports, live coverage of sports events and drama or radio plays while francophones are somewhat more predisposed towards programs which analyze events in the news.

One in three (32%) radio listeners whose home language is other than English or French regularly listen to multicultural or multilingual radio programs.



73

Beyond gender, age and language, there are several other distinctive characteristics for different types of radio programs. The most notable are:

- Talk shows appeal most to radio listeners at the bottom end of the education and income scales. The level of interest declines as education and income levels increase.
- Live coverage of sports events appeals equally to all income groups but more so to those with less than a high school education (27%) and least of all to university graduates (19%). Sports announcements, on the other hand, are least popular among people with annual household incomes below \$15,000 (33%) are most popular among listeners with household incomes above \$50,000 (45%) but are equally favoured among all education groups.
- English language CBC radio listeners are more likely than listeners of other radio stations to tune regularly in to news and weather reports (91%), radio drama (22%) and multicultural or multilingual programming (14%).

## 2.6 Program Opportunities

The types of programming radio listeners would like to hear more of is also an indication of the programming they most enjoy right now. Some preferences are obvious: young people would like to hear more top 40 hits, 35 to 49 year olds want more hits from the 50's and 60's while seniors want more hits from the 30's and 40's. Others are less predictable. Radio listeners' appetite for country and western and folk music increases with age, while rhythm and blues and jazz music is most popular with younger radio listeners.

Support for increased programming in each of 20 format categories is shown in the following table.

**WHICH TYPES OF RADIO PROGRAMMING, IF ANY,  
WOULD YOU LIKE TO HEAR MORE OF IN YOUR AREA?**

	<u>% of Adult Canadian Radio Listeners</u>
Easy listening	42
Hits from the 50's and 60's	40
News and weather	29
Country and western	29
Top 40 hits	26
Canadian performers	23
Hits from the 30's and 40's	23
Classical music	20
Programs that analyze news events	20
Talk or phone-in shows	17
Folk music	16
Rhythm and blues	15
Adult-oriented rock	15
Jazz	13
Sports announcements	12
Live sports coverage	11
Alternative music	11
Drama or radio plays	8
Multilingual or multicultural	4
Other	4
None/DK/Don't know	10

While the national figures are interesting, the identification of program opportunities is most useful by specific target groups.

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## Program Preferences By Age of Listener

### 18 to 24 Year Olds

Substantial numbers of radio listeners in this age bracket want more top 40 hits, adult-oriented rock and alternative music such as new wave or contemporary, but they also want easy listening music, hits from the 50's and 60's and more Canadian performers.

**% of Radio Listeners  
Aged 18 to 24 Who Want  
To Hear More:**

---

Top 40 hits	45
Easy listening music	36
Hits from the 50's and 60's	35
Canadian performers	26
Adult-oriented rock	24
Alternative music	23

### 25 to 34 Year Olds

Compared to the younger radio audience, emphasis in this group is placed more on easy listening music and hits from the 50's and 60's than on top 40 hits, and their interest in alternative music is low (14%).

Baby Boomers also express some preference for more news and weather reports, Canadian performers and country and western music.

**% of Radio Listeners  
Aged 25 to 34 Who Want  
To Hear More:**

---

Easy listening music	41
Hits from the 50's to 60's	41
Top 40 hits	34
Adult-oriented rock	26
News and weather	26
Canadian performers	25
Country and western	24

### 35 to 49 Year Olds

Easy listening, hits from the 50's and 60's, and country and western music are the top three musical preferences of middle aged radio listeners. Hits from the 50's and 60's are most popular with this age group overall.

Thirty-five to 49 year olds also express some interest in hearing more news and weather reports and classical music. The demand for more Canadian performers is, at 21 per cent, somewhat less than among radio listeners under age 35.

	<u>% of Radio Listeners Aged 35 to 49 Who Want To Hear More:</u>
Easy listening music	46
Hits from the 50's and 60's	46
Country and western	33
News and weather	27
Classical music	24

### 50 to 64 Year Olds

The desire for more easy listening music peaks with this age group, as does support for more news and weather reports, analysis of events in the news and classical music.

Fifty to 64 year olds are second only to the 65 and over age group in their interest in hits from the 30's and 40's.

	<u>% of Radio Listeners Aged 50 to 64 Who Want To Hear More:</u>
Easy listening music	50
Hits from the 50's and 60's	40
Hits from the 30's and 40's	39
News and weather	38
Country and western	36
Classical music	25
Analysis of news events	24
Canadian performers	23
Talk or phone-in shows	22

### 65 Years and Over

Young people are firmly rooted in today's music and the current revival of 50's and 60's tunes. Older radio listeners, on the other hand, most prefer music from their own youth and country and western songs.

Along with 50 to 64 year olds, they are more interested in news and weather reports, analysis of news events and talk or phone-in shows than younger radio listeners, but are less interested in classical music and Canadian performers than the 50 to 64 age group.

#### % of Radio Listeners Aged 65 and Over Who Want to Hear More:

Hits from the 30's and 40's	42
Country and western	38
News and weather	37
Easy listening	36
Hits from the 50's and 60's	29
Analysis of news events	23
Talk or phone-in shows	23

### **Program Preferences by Gender**

Male radio listeners are somewhat more inclined than female listeners to want more news and weather reports, sports announcements and live sports coverage, while women are oriented toward more easy listening and classical music. In all other areas, they express similar levels of interest in various radio formats.

	<u>Male</u> <u>% of Radio Listeners</u> <u>Who Want to Hear More:</u>	<u>Female</u> <u>% of Radio Listeners</u> <u>Who Want to Hear More:</u>
Easy listening music	37	47
News and weather	34	25
Classical music	18	23
Sports announcements	19	5
Live sports coverage	17	5

## Program Preferences by Language

Anglophones, more so than francophones, tend to favour hits from the 50's and 60's and country and western music. Francophones, on the other hand, are more likely to want easy listening music, music by Canadian performers and radio programming that analyzes events in the news.

	Anglophones % of Radio Listeners <u>Who Want to Hear More:</u>	Francophones % of Radio Listeners <u>Who Want to Hear More:</u>
Easy listening music	39	52
Hits from the 50's and 60's	41	36
Country and western	32	23
Canadian performers	22	29
Analysis of news events	18	28

One in five listeners (20%) whose home language is other than English or French want more multilingual radio programming.

## 2.7 Attitudes Toward Radio

### 2.7.1 Radio as Part of Daily Life

Radio is second only to newspapers as an important part of daily life for users of that medium. Almost three in four radio listeners (73%) agree that radio is important to them on a daily basis; 40 per cent agree strongly.

While the percentage of radio listeners who accord at least some importance to the medium is fairly consistent across all demographic groups, several population segments feel more strongly about radio than others.

Fifty to 64 year olds are most dedicated to radio, with 47 per cent of the radio listeners in this age group agreeing strongly that radio is an important part of daily life. The level of strong agreement is lowest among 25 to 34 year olds (35%).

English and French speaking radio listeners are equally committed to radio but third language Canadians are more ambivalent about the importance of this medium.



Radio is equally important to listeners both at the bottom and top ends of the education and income scales; also to listeners in all regions of the country and those living in major urban centres as well as in rural communities.

In terms of listening behaviour, radio is obviously most important to heavy listeners (64% agree strongly versus only 19% of light listeners) but there is no difference in the attitudes of CBC Radio, Radio-Canada, other Canadian radio or U.S. radio listeners.

### **2.7.2 Programming: Canadian Content**

Canadian radio faces less competition from American broadcasts than Canadian television. Only 14 per cent of Canadian radio listeners regularly tune in to American stations compared with 62 per cent of Canadian television viewers who regularly watch ABC, NBC or CBS. Most radio programming in this country is, therefore, "Canadian." But the musical content is largely foreign. To ensure that Canadian recording artists are heard, the CRTC requires that Canadian recording artists must represent 30 per cent of the musical content on Canadian radio stations.

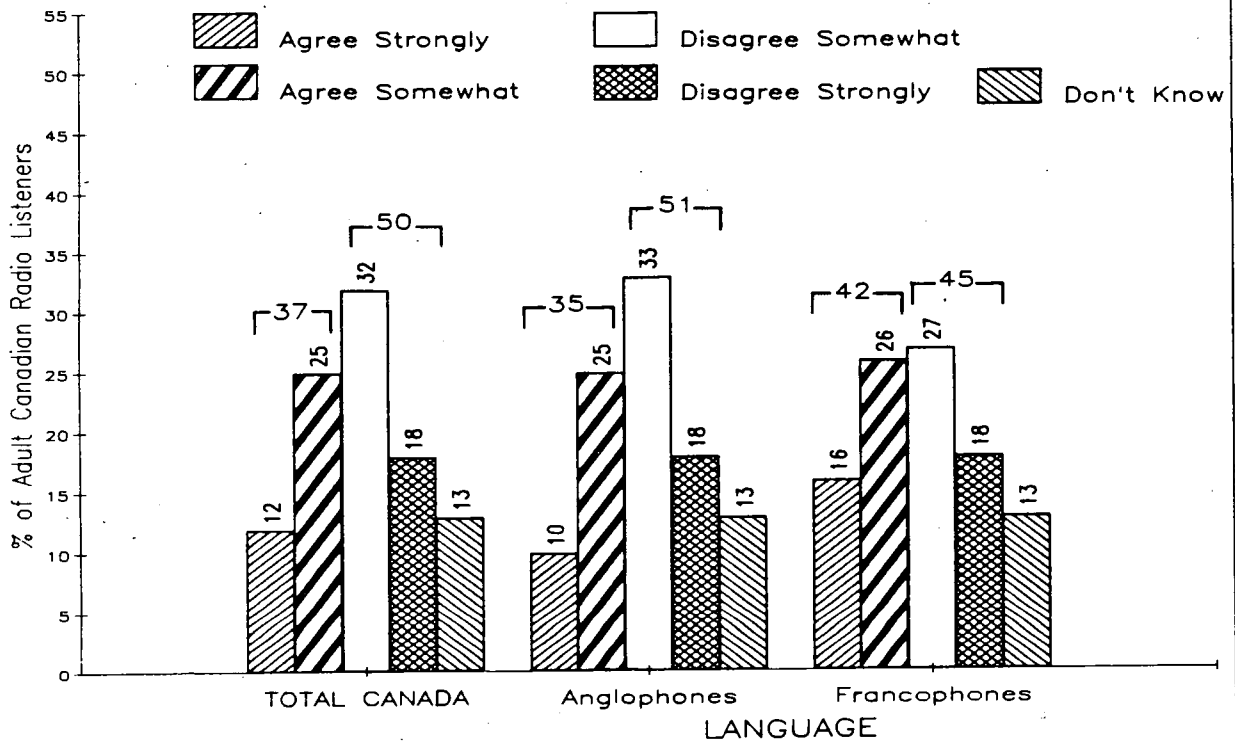
Despite the Canadian origin of most radio broadcasting and the current CRTC ruling on Canadian musical content, over one in three radio listeners - 37 per cent - believe that there should be more radio programs in this country which reflect a Canadian point of view.

This is somewhat higher than the 23 per cent who express an interest in hearing more Canadian performers on radio and may reflect a desire for more of a Canadian focus to the information side of radio as well for the showcasing of more Canadian performers.

By far the larger number - 50 per cent of radio listeners - believe that there are enough radio programs which are "Canadian" in their orientation. Thirteen per cent have no opinion one way or the other.

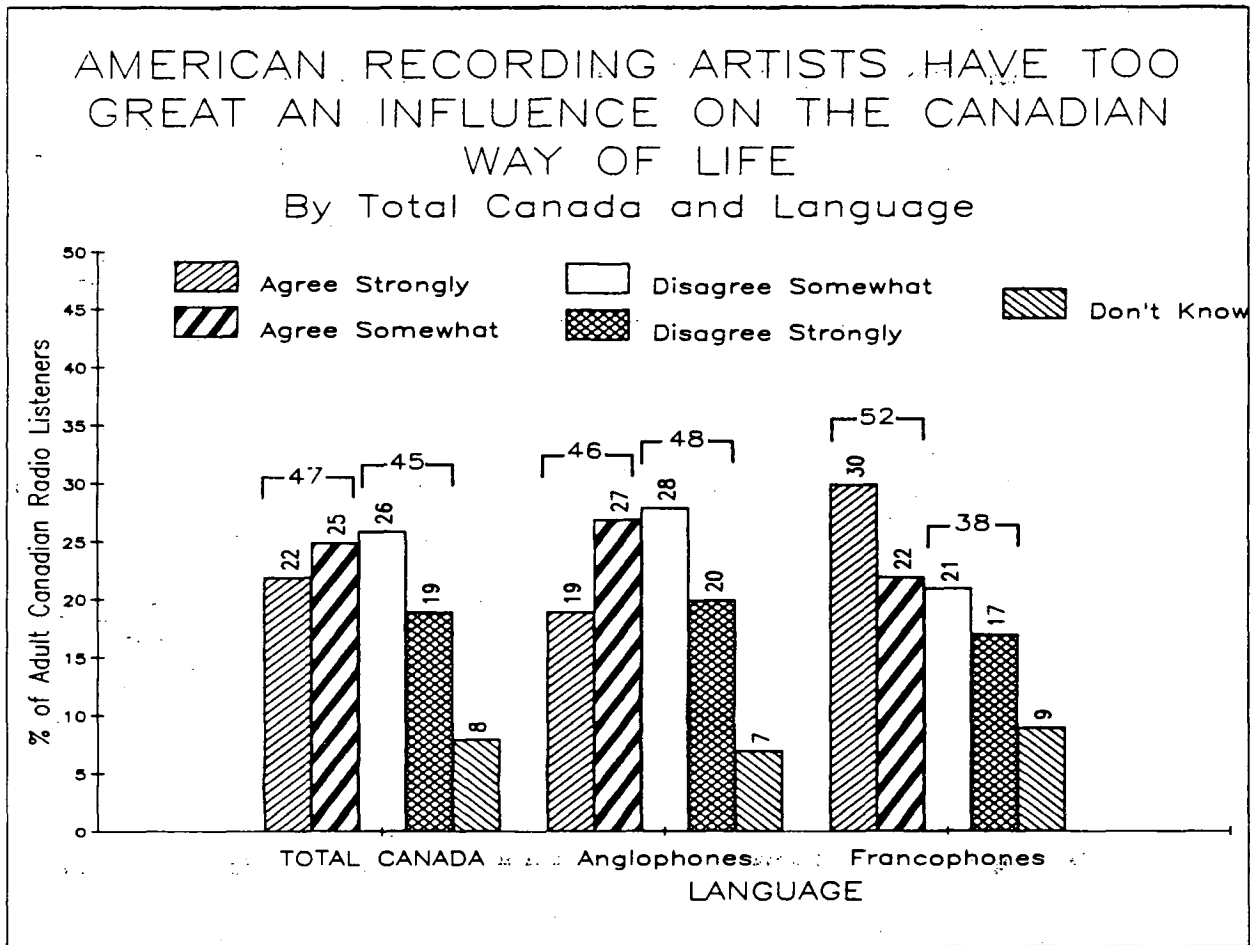
Francophones are more likely than other Canadians to want more Canadian performers on radio and they are also the only radio user group where almost as many say there are not enough radio programs with a Canadian point of view (42%) as those who say there are (45%).

### THERE ARE NOT ENOUGH RADIO PROGRAMS THAT REFLECT A CANADIAN POINT OF VIEW By Total Canada and Language



Canadian radio listeners are divided on whether or not American recording artists have too great an influence on our way of life. Forty-seven per cent agree that they do; 45 per cent disagree.

The threat of American cultural domination is more keenly felt among francophones and in the province of Quebec. In each instance, a majority (52%) agrees that the influence of American recording artists is too great; 30 per cent agree strongly.



### 2.7.3 Censorship

Radio, per se, is not seen as an overly sexual or violent medium but some rock music is offensive and, in the opinion of a majority of radio listeners, should be censored. Those who are most in favour of censorship, however, are also least likely to actually listen to rock music.

### Violence, Sex and Illegal Drugs

Radio has the most upright image of the four media. Few Canadians say that radio places too much emphasis on violence, sex or illegal drugs. The level of criticism was low in the 1969 Senate Commission survey and is even lower today.

#### ATTITUDES TOWARD VIOLENCE, SEX AND ILLEGAL DRUGS ON RADIO

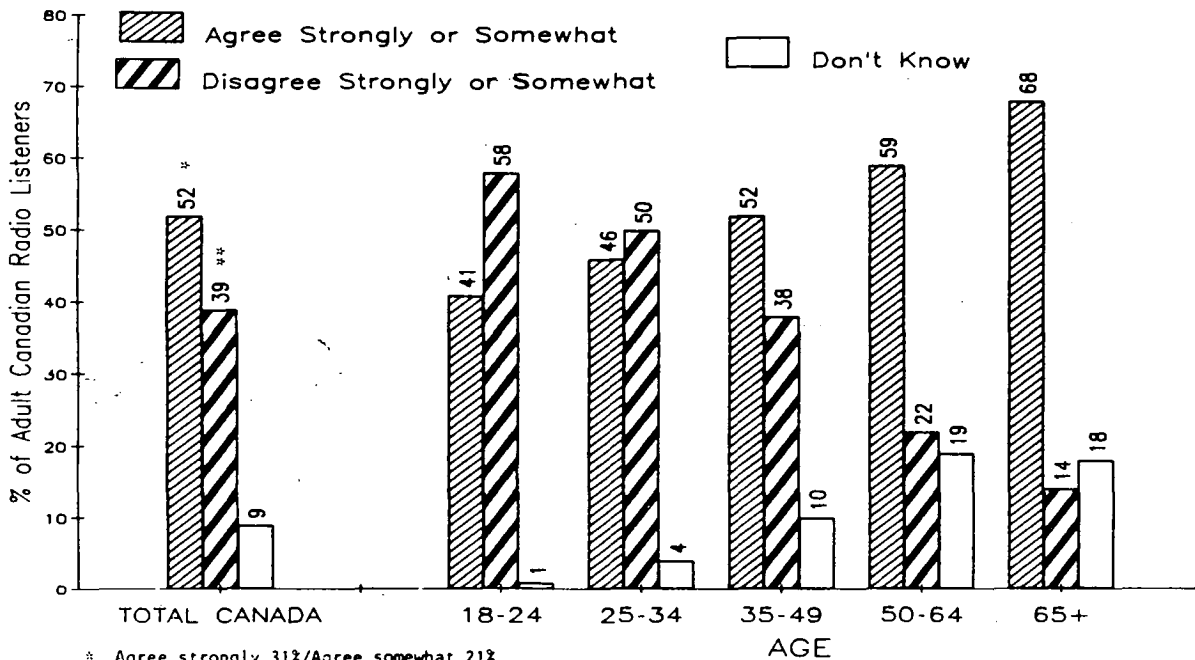
	<u>Enviro-nics' Media Study</u>	<u>1969 Senate Report On Mass Media</u>
% of Canadians who say there is to much _____ on radio		
Violence	16	25
Sex	12	18
Illegal drugs*	13	21

\* In 1969 the question read "too much drug usage."

## Censorship of Rock Music

Attitudes toward censorship and, in particular, the censorship of rock music, are very much tied to age. Young people, who also constitute a major portion of the audience for rock music, are more opposed to censorship (58%) than in favour. Support for censorship of rock music increases directly with age to a point where radio listeners aged 65 and over are in favour by a ratio of almost five to one. The "don't know" factor also increases with age from a low of one per cent among 18 to 24 year olds to a high of 18 per cent among seniors.

### SOME ROCK MUSIC SHOULD BE CENSORED BECAUSE IT CONTAINS TOO MUCH REFERENCE TO SEX OR VIOLENCE By Total Canada and Age



\* Agree strongly 31%/Agree somewhat 21%  
\*\* Disagree strongly 22%/Disagree somewhat 17%

New musical preferences are launched with each generation and, as the section on program opportunities outlines in detail, can differ substantially from one age group to the next. Whether or not the censorship of any musical form is fair and reasonable must be determined within the context of who is doing the listening and who is most critical.

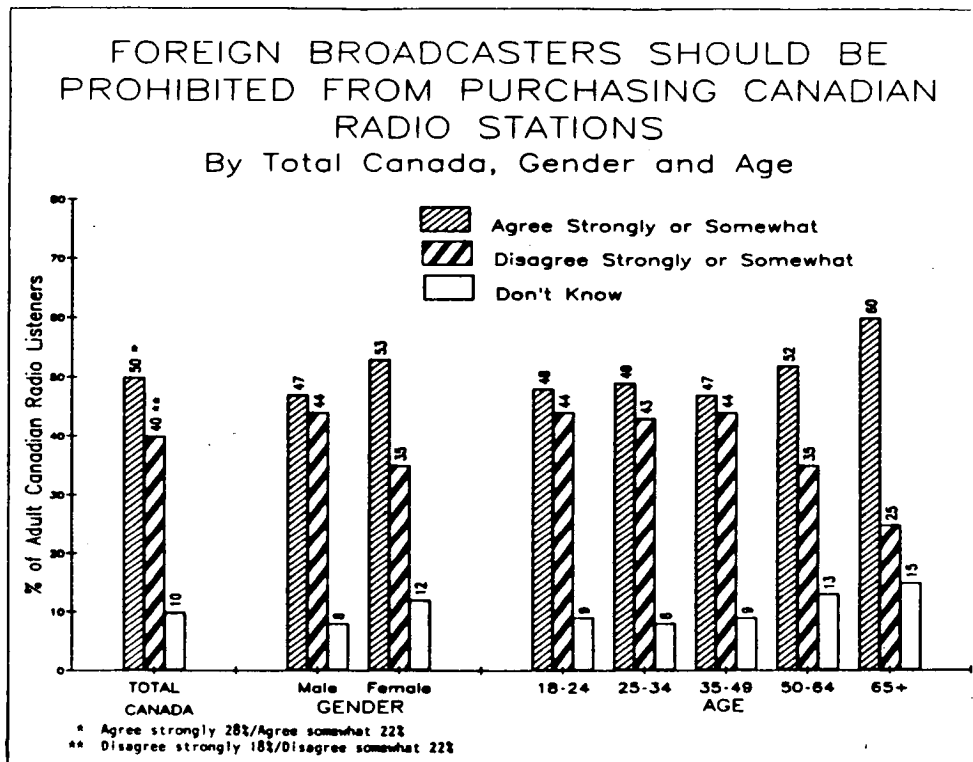
84

## 2.7.4 Foreign Ownership

Attitudes toward the foreign ownership of Canadian radio and television stations are directly parallel.

Fifty per cent of all radio listeners agree that foreign broadcasters should be prohibited from purchasing Canadian radio stations but a substantial minority - 40 per cent - disagree. Ten per cent have no opinion one way or another.

Protection from foreign ownership has been one of the mainstays of government policy toward the media industry in this country since the first Royal Commission on broadcasting submitted its report in 1929. It appears now that a considerable segment of the Canadian radio and television audience is either indifferent or opposed to protection of this nature.



Women are slightly more in favour than men of prohibiting foreign ownership of Canadian radio stations. Radio listeners under the age of 50 tend to be divided in their views while the majority of those aged 50 and over support the prohibition of foreign ownership.

Beyond gender and age, there are no demographic, regional or radio listening characteristics which distinguish those in favour of protection versus those opposed. Attitudes are fairly consistent across all groups.

## 2.7.5 Competition

Thirty-seven per cent of all adult Canadian radio listeners would like to see another local radio station in their community. Support for another local radio outlet is particularly high among young radio listeners (56%) and declines with increasing age to a low of 24 per cent among the elderly.

In terms of socio-economic status, the better educated and more affluent radio listeners are least likely to want more local radio stations (at 28% and 31% respectively) while downscale listeners are most likely to support increased radio choices (41% of those with less than a high school education; 44% of those with household incomes below \$15,000).

Among the separate provincial markets, Maritimers are the most eager for more local radio outlets (54%), followed by Manitoba/ Saskatchewan (43%) and British Columbia (41%).

Quebecers and, in particular, Montrealers, are most strongly opposed to additional radio stations in their community.

Toronto is, in the opinion of many radio experts, the most underserved major radio market in North America. Most Toronto radio listeners, however, tend to be satisfied with the local station options already available to them. A minority - 29 per cent - agrees that there should be another radio station in Toronto, but only 12 per cent feels strongly about this.

### YOU WOULD LIKE TO SEE ANOTHER LOCAL RADIO STATION IN YOUR COMMUNITY

	Agree Strongly	Agree Somewhat	TOTAL AGREE	Disagree Somewhat	Disagree Strongly	TOTAL DISAGREE	DK
Total Canada	18	19	37	24	33	57	6
Regions:							
Atlantic	25	29	54	20	20	40	6
Quebec	18	15	33	19	43	62	4
Montreal	15	13	28	22	47	69	3
Ontario	15	18	33	28	32	60	8
Toronto	12	17	29	27	32	59	13
Man/Sask.	20	23	43	27	22	49	8
Alberta	17	19	36	30	30	60	4
B.C.	23	18	41	20	34	54	6
Vancouver	17	27	44	25	23	48	8

*Handwritten signature or initials*

## 3.0 DAILY NEWSPAPERS

### 3.1 Overview

Canadian daily newspapers have a long and illustrious history and, despite the growing proliferation of media choices, maintain a substantial foothold on Canadians' media habits. Environics' Media Study found that 84 per cent of adult Canadians read or look at a daily newspaper at least one day a week. Over half - 54 per cent - look at a newspaper daily, that is, six or seven days a week.

There is a considerable difference in the readership habits of younger and older Canadians, however. Young adults under the age of 35, especially those in the 18 to 24 age group, are much less likely to have looked at a daily newspaper "yesterday", and when they do read newspapers they are much more likely to read such non-news sections as the comics, want ads or entertainment pages and less likely to read the news or editorial pages than older adults.

#### **% OF ADULT CANADIANS WHO READ OR LOOKED INTO ANY OF YESTERDAY'S DAILY NEWSPAPERS\***

(Source: Environics' Media Study)

Total	63%
By age group:	
18-24	55
25-34	57
35-49	67
50-64	71
65+	66

\* "Yesterday" was taken to mean last Friday if the interview was conducted on a Sunday or Monday.

In the sections of this report on television and radio, it has already been noted that interest in news reports increases with age. As young people mature, they will likely become more news oriented and wish to be more informed about the world around them. Whether or not they will turn to newspapers, however, is another question altogether. At the present time Canadians, both young and old, say that television is the one media source they rely on most often for international and national news (refer to Section 5.3). If daily newspapers are to remain competitive, the "non-news" sections will become increasingly important to attract new, younger, newspaper readers and to keep existing readers.



### 3.2 Heavy, Medium and Light Newspaper Readers

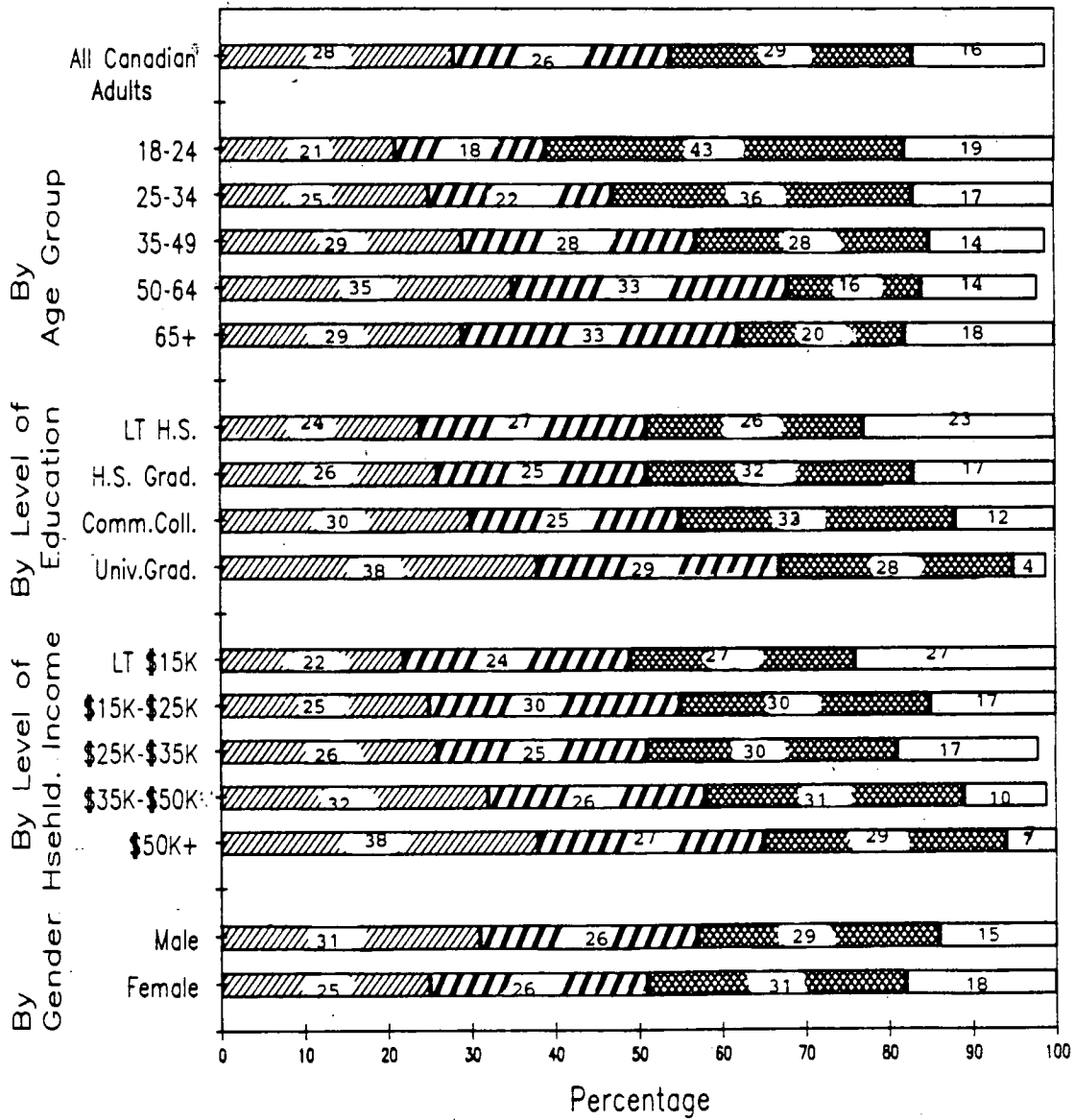
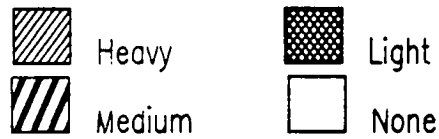
For the purpose of analysis, daily newspaper readers were divided into three roughly equal groups. Throughout the report, heavy, medium and light newspaper readers are defined as:

<u>Reader Type:</u>	<u>Estimated # of Days a Daily Newspaper is Read Per Week</u>	<u>Average # of Days Per Week</u>
Light	1 to 5 days per week	2.7
Medium	6 days per week	6.0
Heavy	7 days per week	7.0

Medium or heavy newspaper users, that is, Canadians who read a daily newspaper six or seven days per week on average, tend to be older, better educated and more affluent. The peak heavy user groups are 50 to 64 year olds, university graduates and people with household incomes above \$50,000.

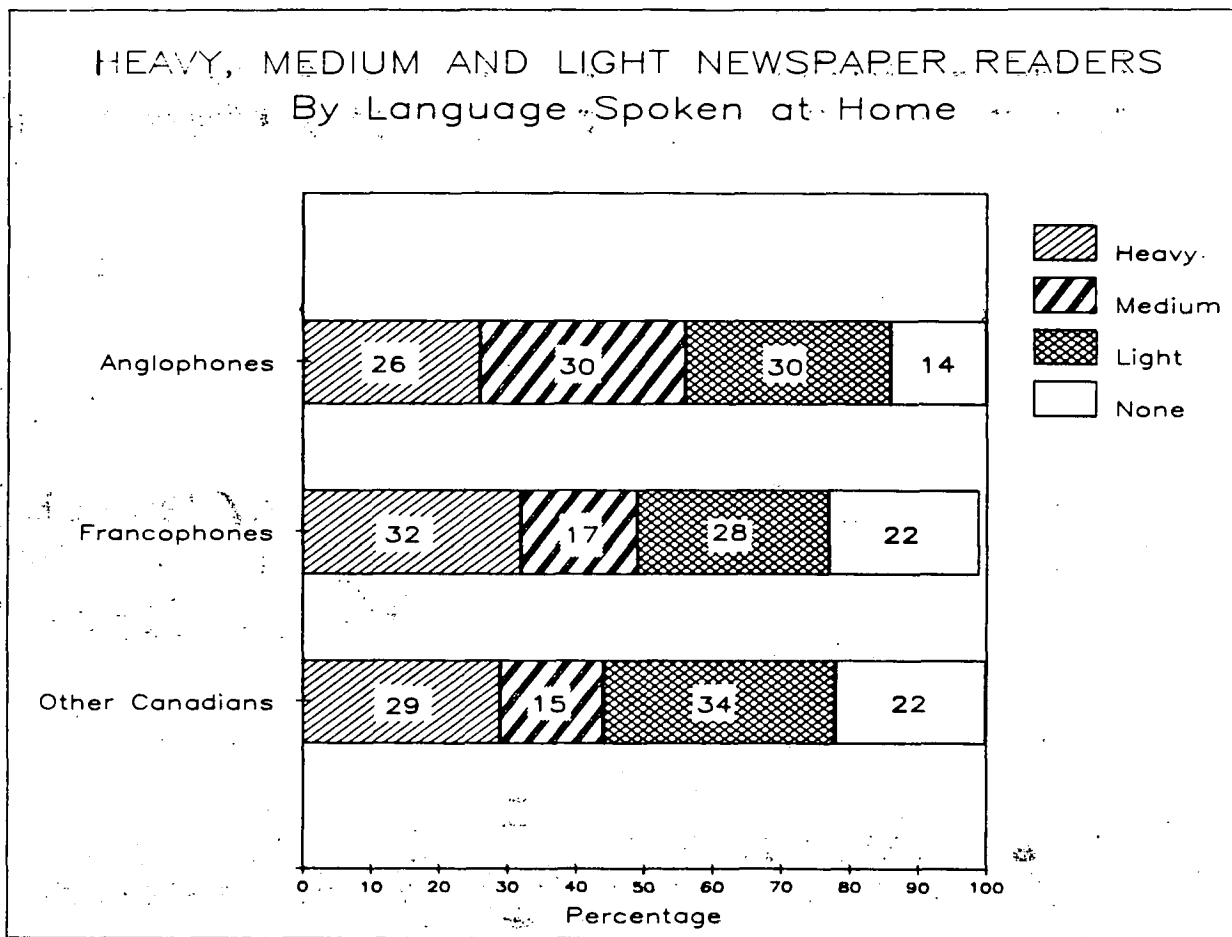
Men are also slightly more inclined to read newspapers than women, including both homemakers and working women.

# HEAVY, MEDIUM AND LIGHT NEWSPAPER READERS By Demographic Characteristics



More anglophones read daily newspapers than francophones (86% versus 78%), but among readers more francophones are heavy users than anglophones (32% versus 26%). This is because of the differences in the Quebec market where Montrealers are skewed toward heavy readership while a substantial number of Quebecers outside Montreal, most of whom are francophones, do not read a daily newspaper even one day a week.

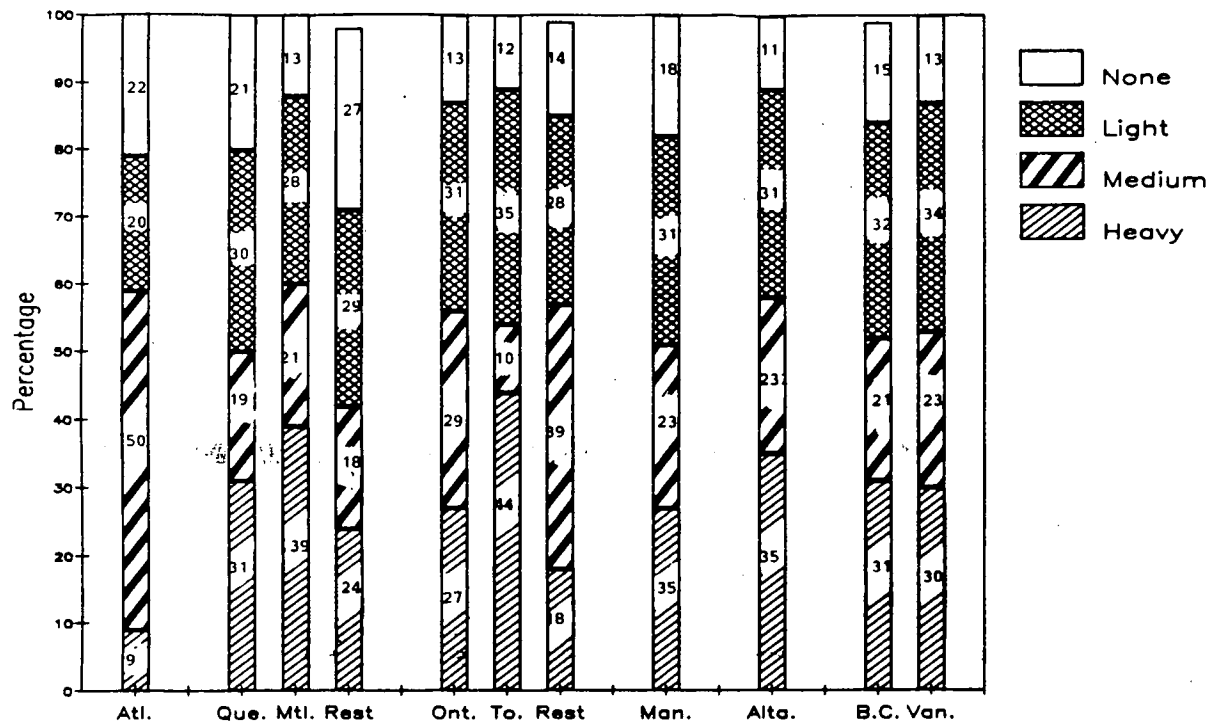
Canadians whose home language is other than English or French are similar to francophones in their level of exposure (78% read daily newspapers) but read fewer issues per week than either English or French speaking Canadians.



Alberta has more adult readers per capita (89%) and more heavy readers (35%) than any other region in Canada. Ontario follows with a particularly high concentration of heavy readers in Toronto (44%).

Montreal, like Toronto, is an especially active newspaper market with few non-readers (13%) and a large number of heavy readers (39%). Outside Montreal, however, over one in four Quebecers (27%) read no daily newspaper at all, the highest level of non-readership in any of the sub-regions measured in this survey.

## HEAVY, MEDIUM AND LIGHT NEWSPAPER READERS By Region and Subregion



### 3.3 English and French Newspapers

Montreal is the only market serviced by indigenous English and French language daily newspapers and, as such, is the only market where readership in both languages is high. The newspaper "read most often" in Montreal tends to be printed in the reader's first language; i.e., French or English. There is less evidence of cross-lingual exposure among newspaper readers than among users of television or radio.

#### LANGUAGE OF DAILY NEWSPAPER READ MOST OFTEN IN MONTREAL VERSUS LANGUAGE MOST OFTEN SPOKEN AT HOME

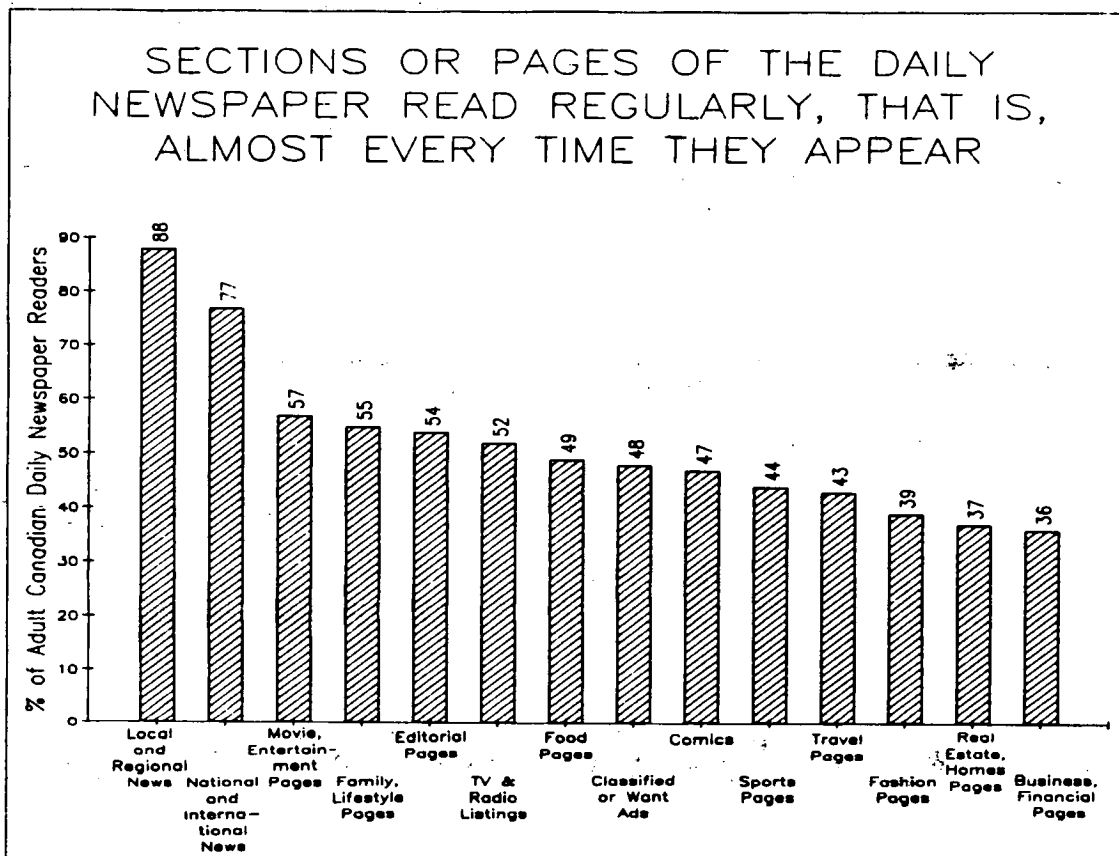
	Daily Newspaper Read Most Often % of Montreal Newspaper Readers	Language Spoken at Home % of all Montrealers
French	59	61
English	40	31
Other	1	8

21

### 3.4 Most Popular Sections of the Newspaper

Daily newspapers are, first and foremost, the source of local and regional news. Almost nine in ten newspaper readers (88%) regularly read the local or regional news pages and, as such, these are the most universally read pages of the newspaper across all demographic groups (including young readers), in all regions of the country and in major urban centres as well as in rural communities.

National and international news is the second most often read "section" of the newspaper (77% of daily newspaper readers read these pages on a regular basis) but here, interest is greater among readers in major urban centres (83%) and declines in less populated areas to a low of 70 per cent in rural communities.



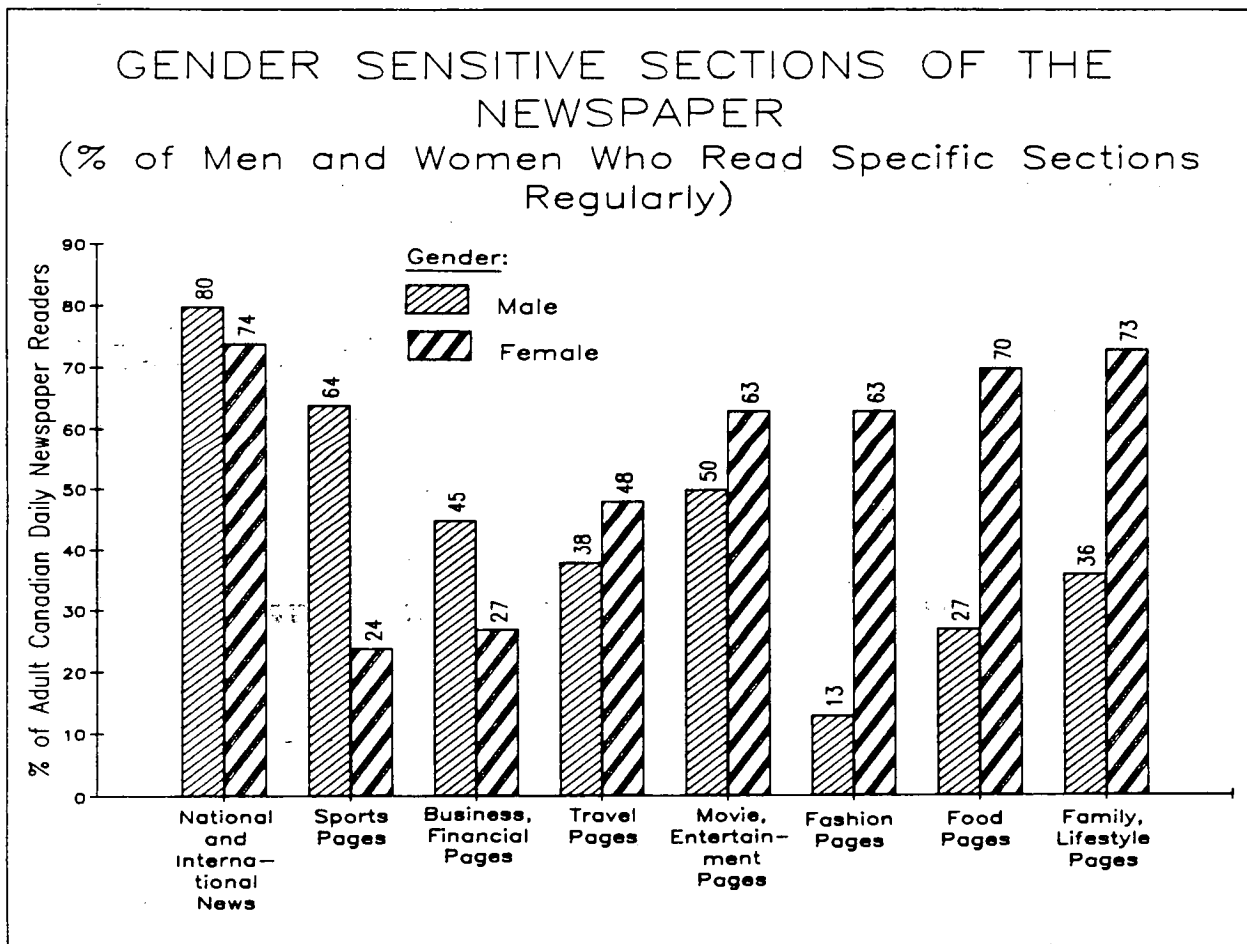
Beyond the news per se, the spectrum of newspaper content attracts the interest of specific target groups both in terms of gender, age and socio-economic status.

Interest in the broader spectrum, ie., national or international news, and business or financial news, increases with level of education and income. The editorial pages are popular regardless of income, but are most read by university graduates.

The traditional readership patterns of men and women still exist. Men are much more likely than women to read the sports pages and the business or financial section of the newspaper. Readership of business news is modestly higher among working women (28%) than among homemakers (23%) but is still far behind the interest level of men overall (45%).

Women, on the other hand, indicate a somewhat higher interest level than men in the travel and movie or entertainment pages, which speaks to their role as the family activity planners. The fashion, food and lifestyle pages also have a larger following among female newspaper readers.

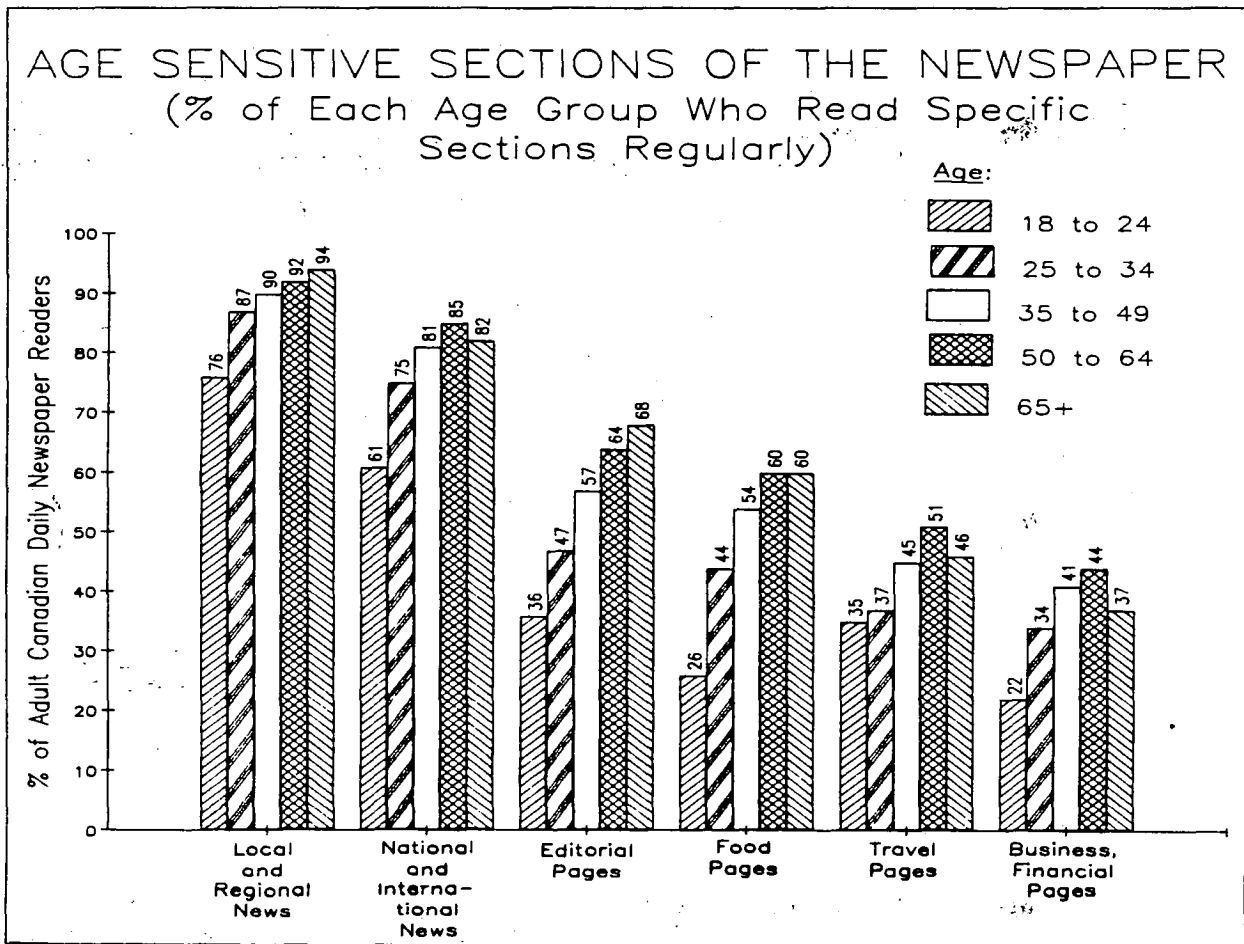
In none of these categories, however, is the readership exclusively male or female. About one in four female readers regularly follow sports and business news; 13 per cent of male readers look into the fashion pages, more than one in four read the food pages and over one-third regularly read the lifestyle section.



23

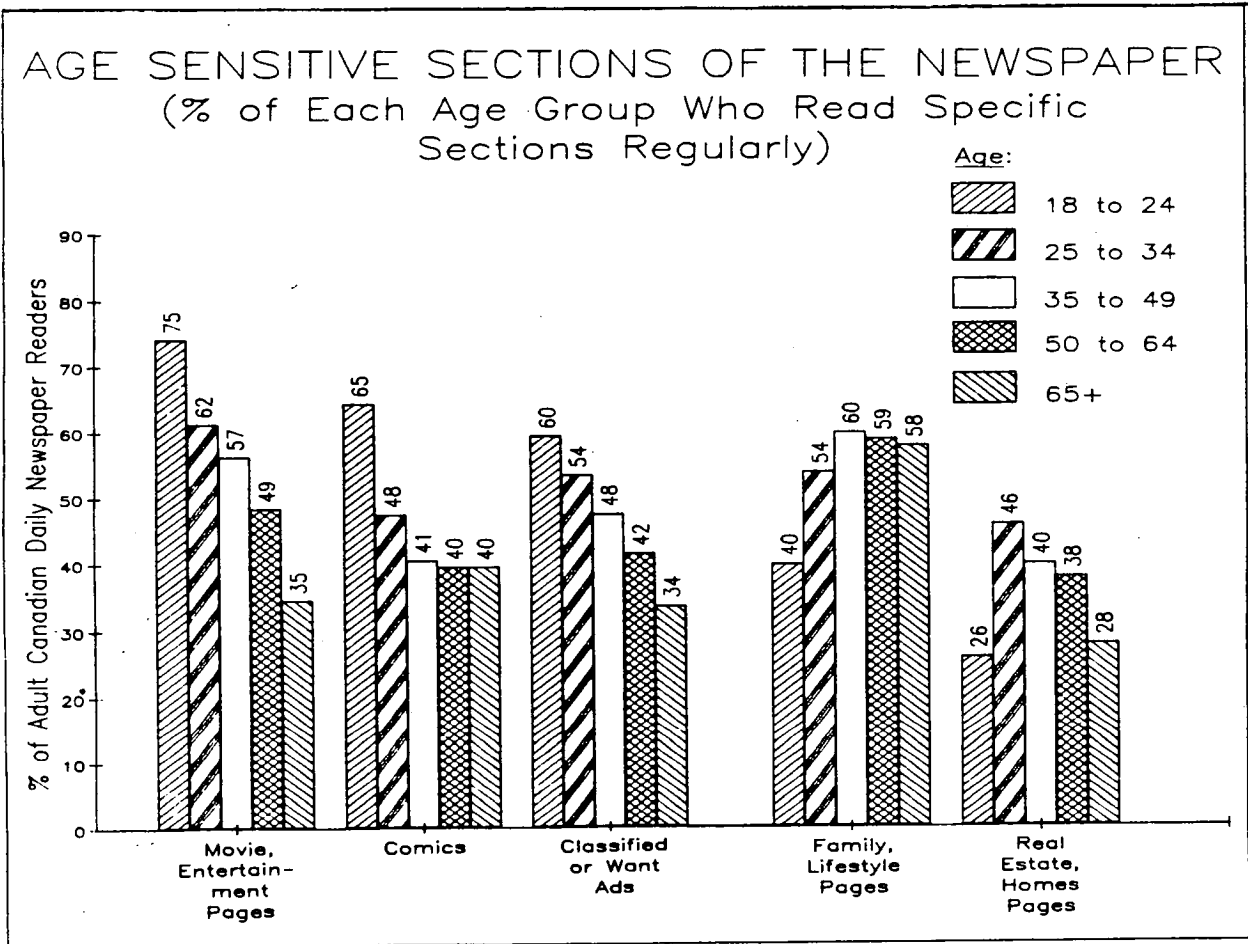
Local, regional, national and international news becomes a top readership priority beyond the age of 25. Interest in editorial comment, however, takes a longer time - or more maturity - to build and only attracts the majority of newspaper readers once they have reached the age of 35.

The heaviest newspaper user group - 50 to 64 year olds - are also the most likely to read the food, travel or business pages on a regular basis.



*a.f.*

After local or regional news, the most popular section of the newspaper among young readers, aged 18 to 24, is the movie or entertainment section followed by the comics and the classified or want ads. The newspaper habit is developed here, with information which is relevant to the entertainment and employment needs of young people. Within a decade, young readers move into the family or lifestyle section and the real estate or homes pages.

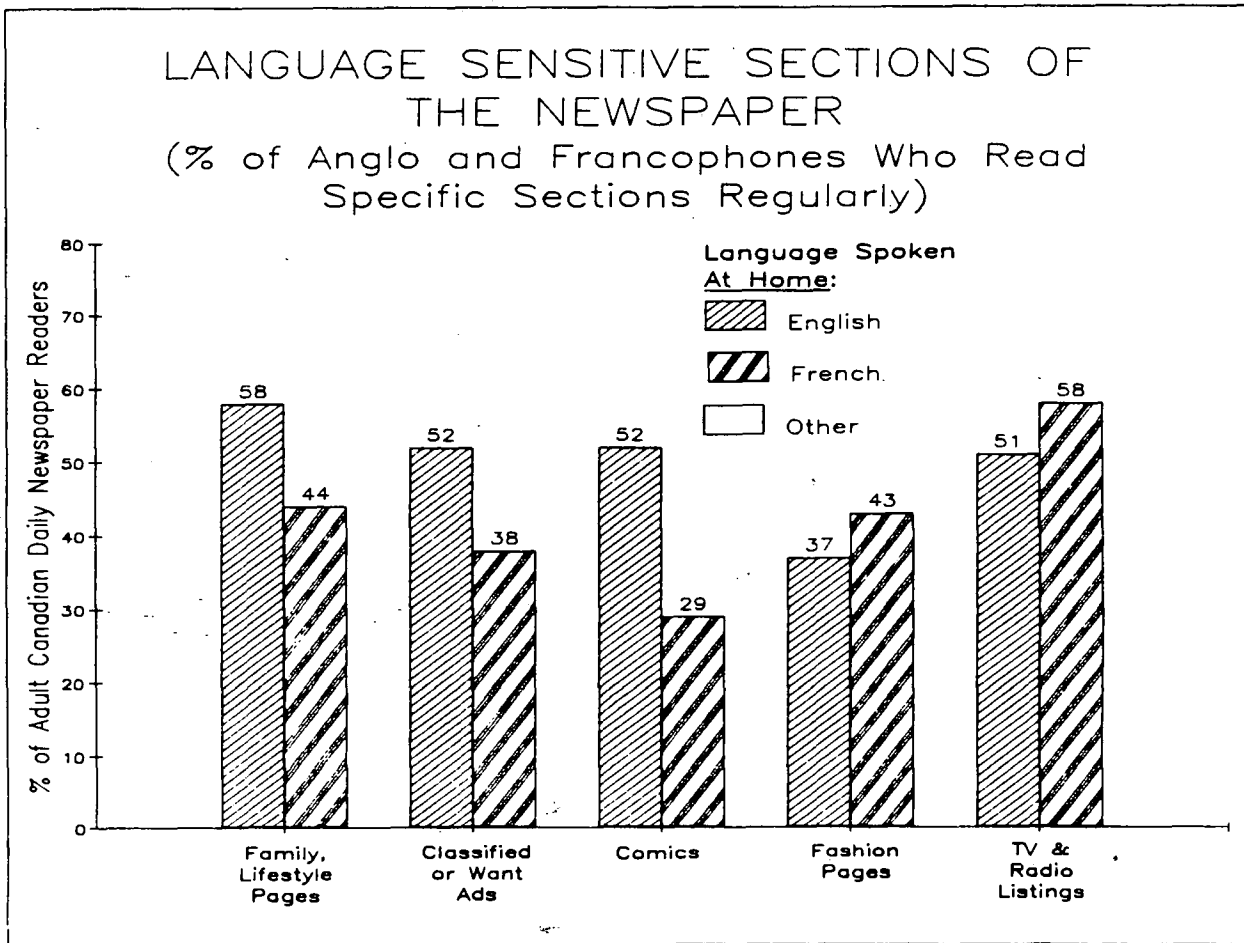


92



Finally, a few other comments should be made about the different content preferences of anglophone and francophone newspaper readers:

- Anglophones are more likely than francophones to read the lifestyle, classified or comic pages.
- Francophones are slightly more oriented than anglophones to the fashion pages and TV/radio listings.



### 3.5 Overall Evaluation of Newspaper Coverage

Newspaper readers were asked: "In general, would you say that the daily newspaper you read most often is doing an excellent, good, fair or poor job of covering the topics in which you are personally interested?"

For most Canadian readers, newspaper coverage is excellent (15%) or good (56%). On a combined basis, this represents 71 per cent who are reasonably satisfied that their daily newspaper is covering the topics which interest them.

Almost three in ten readers say the coverage is only fair (24%) or poor (5%). This is a minority view but is particularly prevalent among readers in Western Canada and Ontarians outside of Toronto.

#### EVALUATION OF DAILY NEWSPAPER READ MOST RE: TOPICS OF PERSONAL INTEREST

- % of Adult Canadian Daily Newspaper Readers -

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Total Canada	15%	56%	24%	5%
By Region:				
Atlantic Provinces	15	64	19	2
Quebec	22	56	18	3
Montreal	25	49	19	6
Rest of Quebec	20	63	17	*
Ontario	13	56	25	5
Toronto	15	61	21	2
Rest of Ontario	13	53	27	7
Manitoba/Saskatchewan	9	57	29	5
Alberta	11	52	29	7
British Columbia	8	55	30	5
Vancouver	9	57	31	4

\* Less than 0.5 per cent.

97

### 3.6 Does Canada Have a National Newspaper?

In 1969, when the Senate Commission Report on Mass Media posed this question to all adult Canadians, 16 per cent said "yes" with anglophones tending to identify Toronto's Globe and Mail and francophones most often mentioning Montreal's La Presse and Le Devoir.

Enviro-nics' Media Study asked newspaper readers if there is such a thing as a national newspaper in Canada and 28 per cent said "yes." Taking into account the more narrowly defined sample base, i.e., newspaper readers instead of all Canadians, awareness has still gone up.

Toronto's Globe and Mail is the only newspaper which positions itself as "Canada's national newspaper" but the belief that Canada has a national newspaper is not confined to Torontonians or to people living in Ontario. Twenty-one per cent of Maritime and Quebec newspaper readers, 30 per cent of Ontarians, 32 per cent of Manitoba/Saskatchewan and British Columbian readers and 36 per cent of Albertans hold this view.

Among those who say that we do have a national newspaper, The Globe and Mail is the "national" newspaper most often identified by anglophones (76%); La Presse (31%) and the Globe and Mail (28%) are the two "national" papers most often mentioned by francophones.

#### WHICH IS CANADA'S NATIONAL NEWSPAPER?

- % of Daily Newspaper Readers  
Who Believe Canada Has a National Newspaper -

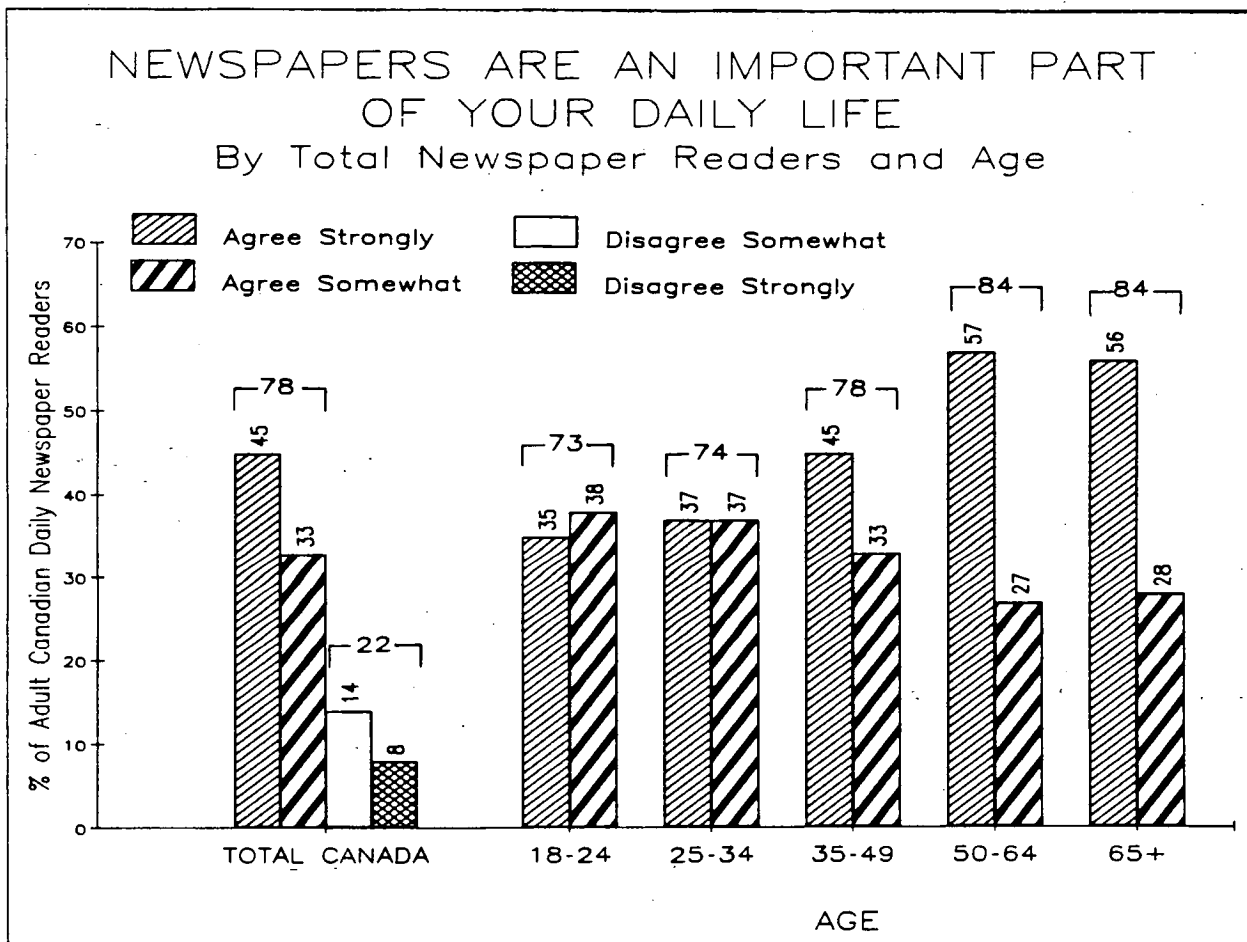
	<u>Total</u>	<u>Anglophones</u>	<u>Francophones</u>
Globe and Mail	68%	76%	28%
La Presse	5	--	31
Le Devoir	1	--	6
Toronto Star	7	8	2
The Sun papers	3	3	2
Other	4	3	6
Don't know	11	8	23

### 3.7 Attitudes Toward Daily Newspapers

#### 3.7.1 Newspapers as a Part of Daily Life

Newspapers, more than any other medium, are considered to be an "important part of daily life" by the users of that medium. Almost eight in ten newspaper readers (78%\*) agree either strongly or somewhat that newspapers are of daily importance to them, compared with 73 per cent of radio listeners and 60 per cent of television viewers who share this view about these other media.

A majority of all adult Canadian newspaper readers regardless of gender, age, language or socio-economic status believe that newspapers are important. The intensity of feeling increases with age, however. Young readers are more likely to "agree somewhat" while older readers tend to "agree strongly."

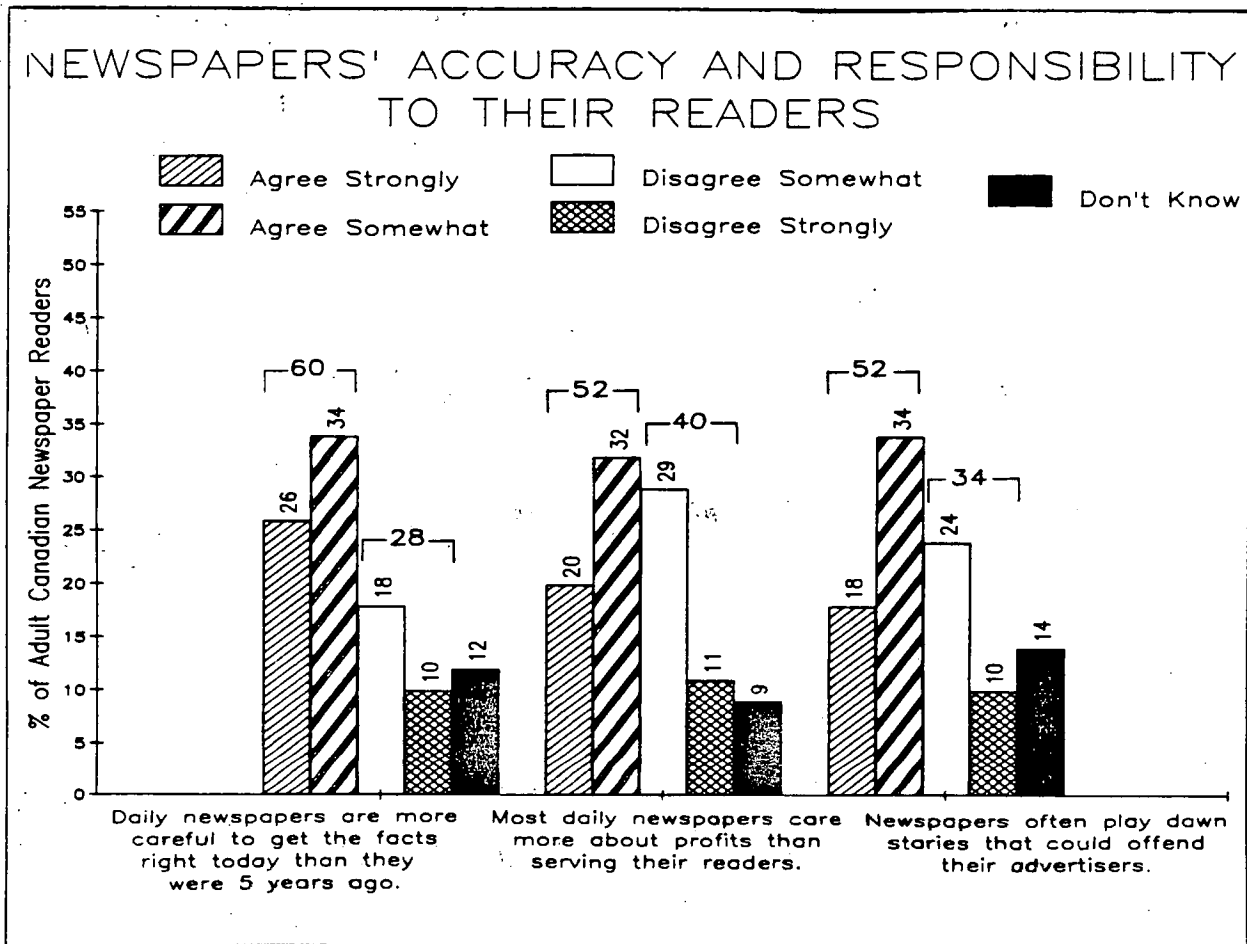


\* Research conducted on behalf of the 1981 Kent Commission on Newspapers found that 77 per cent of all Canadians agreed either strongly or somewhat with the statement that "newspapers are a regular part of your daily life."

99

### 3.7.2 Perceptions of Newspapers' Accuracy and Responsibility to Their Readers

A majority of newspaper readers believe that "daily newspapers are more careful to get the facts right today than they were five years ago", but most also feel that "most daily newspapers care more about profits than serving their readers" and that "newspapers often play down stories that could offend their advertisers." Readers are not firmly rooted in their opinions, however. They are more inclined to agree somewhat than to agree strongly with each of these statements.



100

These three questions were included in the 1981 general public survey for the Kent Commission on Newspapers. In that survey, adult Canadians in general were much more critical of newspapers' pandering to their advertisers than today's newspaper readers. On the other hand, while the majority of adult Canadians in 1981 and the majority of today's newspaper readers both agree that daily newspapers are continuing to improve the accuracy of their news reporting, the percentage agreeing has declined somewhat from 69 to 60 per cent.

Attitudes toward newspapers as a business (ie., concern for profits) versus newspapers as a public service (ie., concern for readers) have not changed much since 1981.

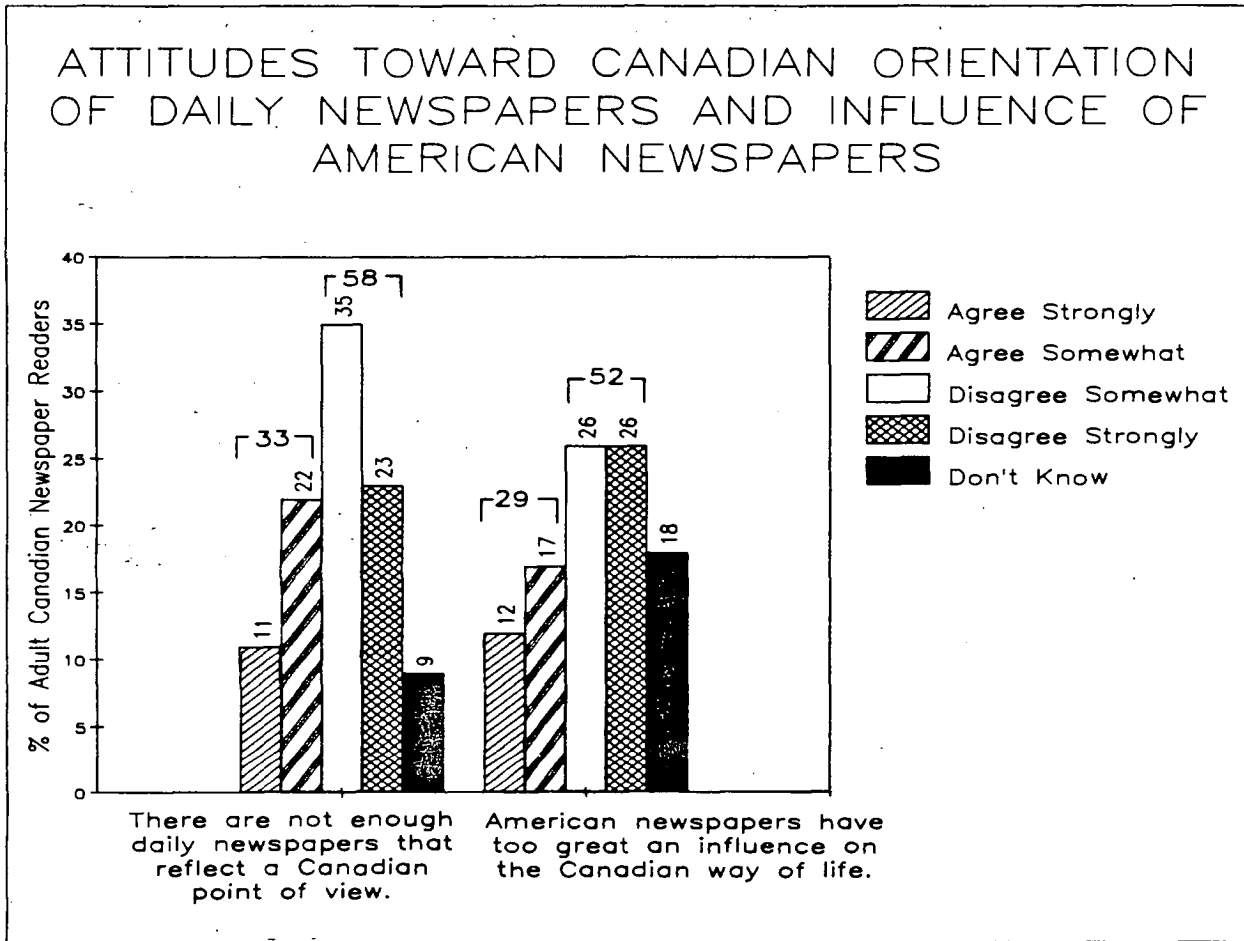
#### NEWSPAPERS ACCURACY AND RESPONSIBILITY TO READERS

	<u>Enviro-nics' Media Study</u>	<u>1981 Kent Commission on Newspapers</u>
	<u>% of Adult Canadian Newspaper Readers Agreeing</u>	<u>% of Adult Canadians Agreeing</u>
Newspapers often play down stories that could offend their advertisers	52	72
Daily newspapers are more careful to get the facts right today than they were five years ago	60	69
Most daily newspapers care more about profits than serving their readers	52	54

### 3.7.3 Canadian Content

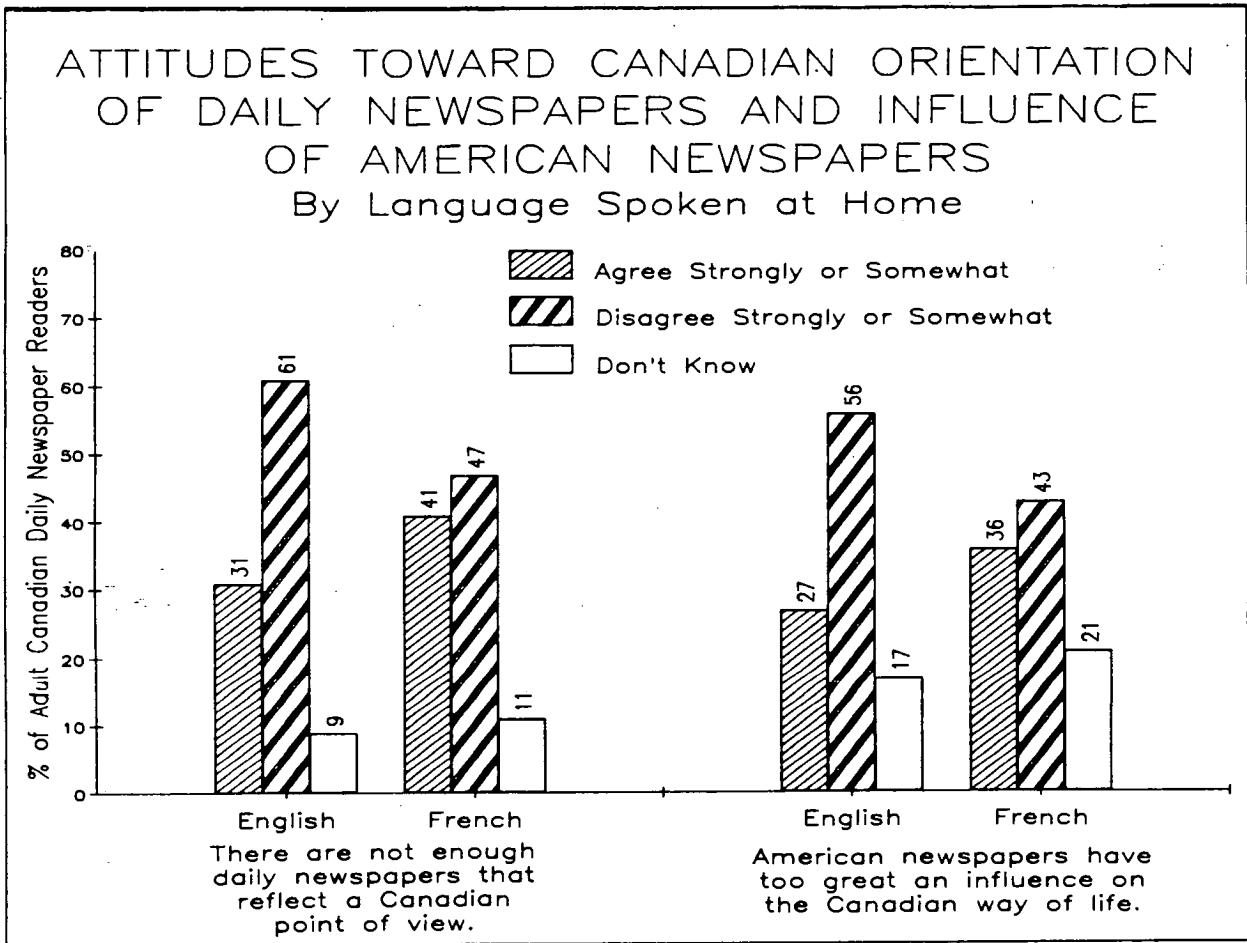
The main raison d'être of Canadian daily newspapers is to serve as a local, community oriented medium. As such, newspapers are less likely than other media to be charged with not providing enough Canadian content. Similarly, American newspapers are considered the least threatening of all American media products on the Canadian way of life.

A majority of newspaper readers believe that there are enough daily newspapers reflecting a Canadian point of view and that American newspapers do not have excessive influence on our national psyche.



102

Francophones are more sensitive to both of these issues, however, and are more concerned than anglophones about the lack of Canadian oriented newspaper content and the influence of American newspapers. The level of concern is above average both among newspaper readers in Montreal and those living in the rest of Quebec. Radio is the only other medium on which francophones and anglophones express such diverging opinions. In both cases, French speaking users of the medium are more likely than English speaking users to be critical of the amount of Canadian content and the negative impact of American content.



Although the desire for more daily newspapers which reflect a Canadian point of view is skewed toward francophones and Quebecers, Maritime newspaper readers are also more likely than other Canadians to want a broader selection of Canadian oriented newspapers (44% versus 33% of Canadian newspaper readers in general).

103



### 3.7.4 Censorship

Canadians are reluctant to advocate increased censorship of any medium, and this is especially true for newspapers. Only two in ten newspaper readers (21%) support stricter censorship of Canadian newspapers in general; three in four (74%) are opposed, with almost half (46%) strongly opposed.

Even among the least permissive media user groups--the elderly and people at the bottom end of the education and income scale--more than twice as many are against increased censorship of Canadian newspapers as are in favour.

### Sex, Violence and Illegal Drugs

In the 1969 Senate Committee Report on Mass Media, over half of all adult Canadians said that there is too much violence in newspapers. Today, only one in three Canadians hold this view. Still, among the triad of violence, sex and illegal drugs, "too much violence" remains the predominant criticism of newspaper reporting. Newspapers are second only to television in being seen to place too much emphasis on violent content.

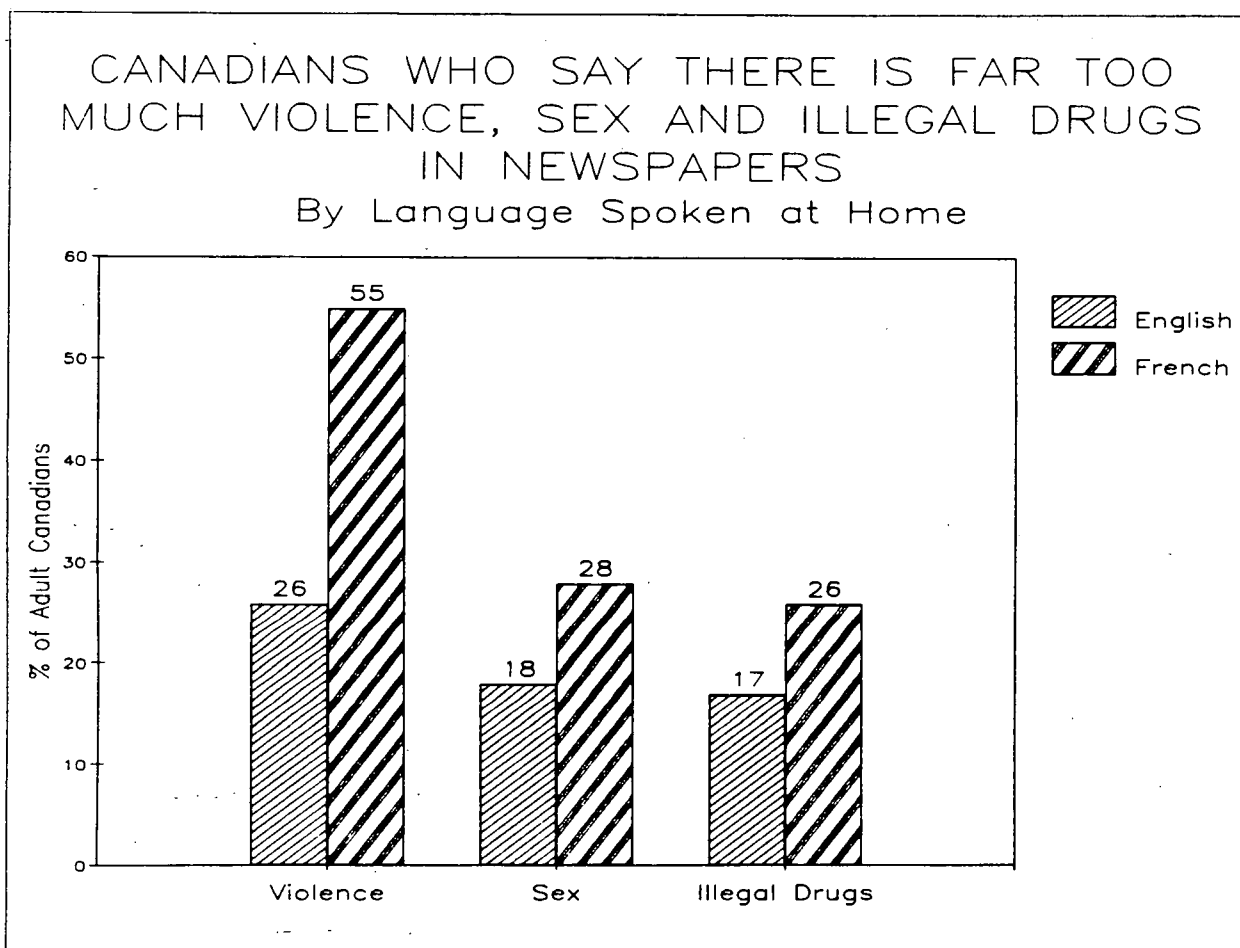
#### ATTITUDES TOWARD VIOLENCE, SEX AND ILLEGAL DRUGS IN NEWSPAPERS

	<u>Environics' Media Study</u>	<u>1969 Senate Report on Mass Media</u>
% of Canadians who say there is too much _____ in newspapers		
Violence	33	56
Sex	20	41
Illegal drugs*	20	45

\* In 1969 the question read "too much drug usage."

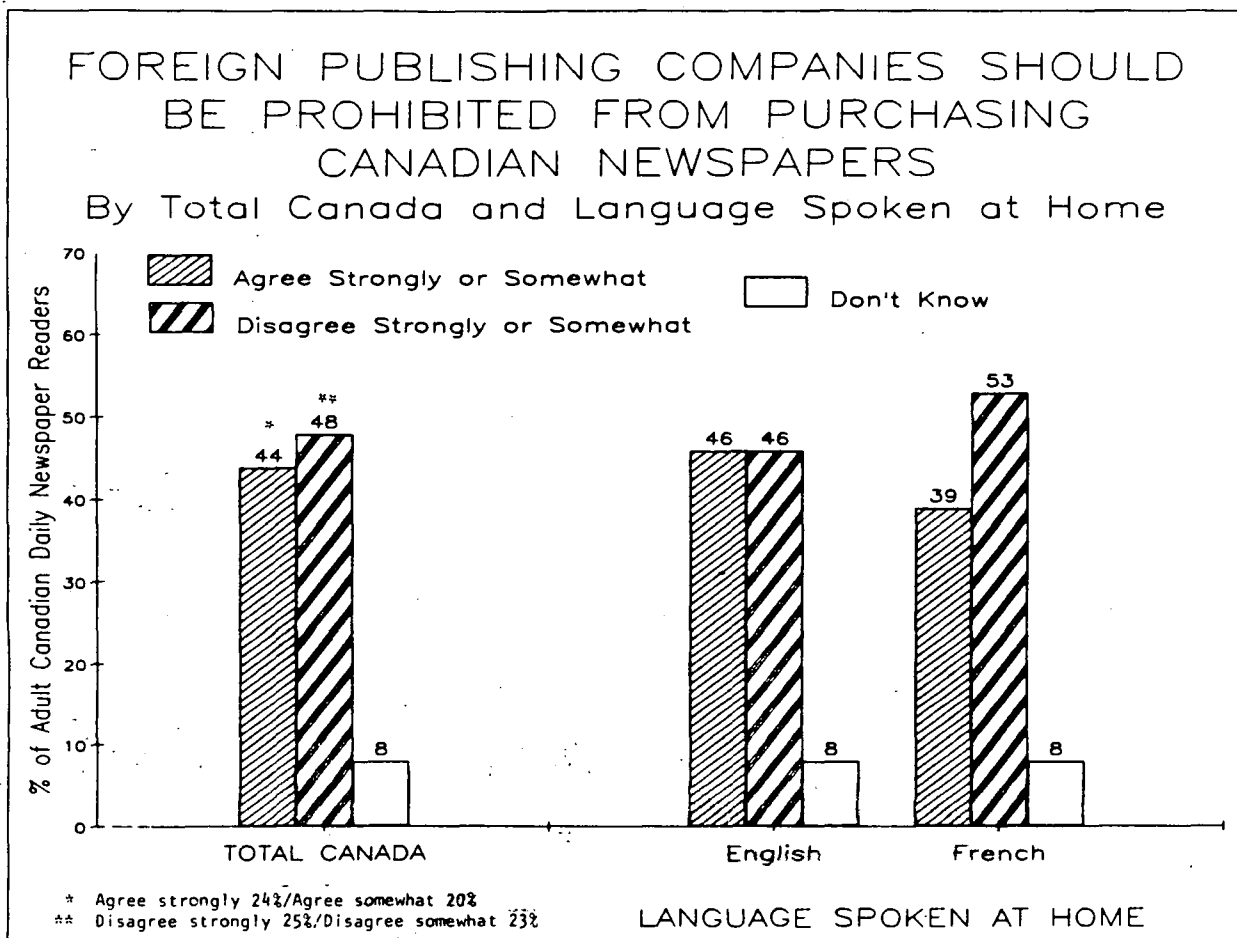
The response of various demographic groups toward violence, sex and illegal drugs in the media has already been thoroughly discussed and is no different for newspapers than for television or radio. Women, the elderly and Canadians at the lower end of the socio-economic scale are most sensitive to perceived media excesses in these areas.

The newspaper industry, however, is the only medium which is more severely judged by francophones than anglophones, particularly for being too violent. Over half of all francophones (55%) say that newspapers are far too violent compared with only 26 percent of anglophones who share this view.



### 3.7.5 Foreign Ownership

Foreign ownership of any Canadian media outlet is not seen as a sufficient threat or benefit to media users to galvanize public opinion one way or the other. Newspaper readers are slightly more in favour of allowing the sale of Canadian newspapers to foreign publishing companies (48%) than opposed (44%) but the margin between the two points of view is narrow. English speaking newspaper readers are equally divided on the issue of foreign ownership while francophones are more clearly on the side of permitting foreign ownership (53%) than preventing it (39%). This finding is consistent for both Montrealers as well as for other Quebec newspaper readers.



Beyond language, there is little difference in the attitudes of newspaper readers on this issue, regardless of gender, age, socio-economic status or degree of newspaper usage.

106

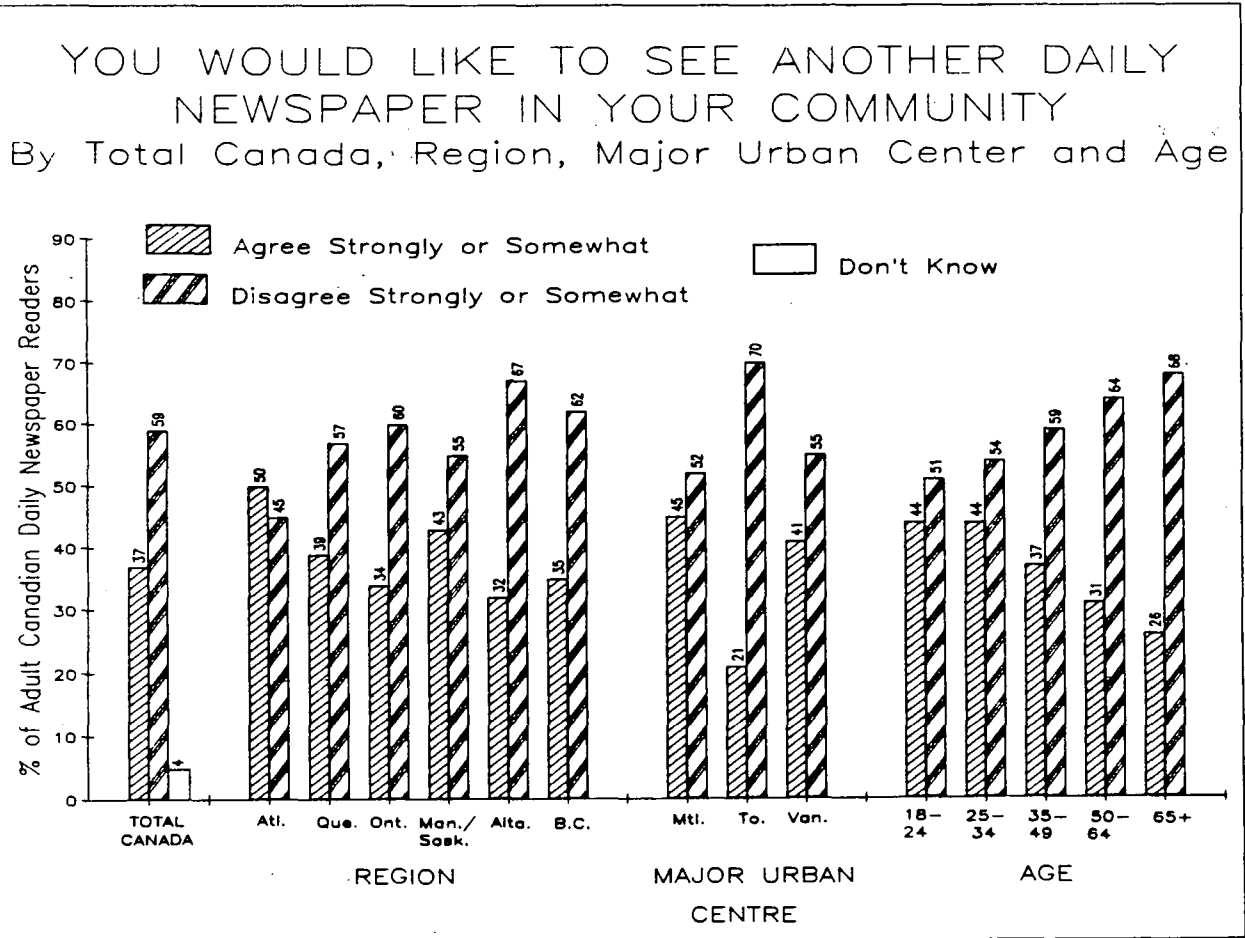
### 3.7.6 Competition

A majority of Canadian newspaper readers (59%) believe that they are well served by existing daily newspapers and that there is no need for another daily newspaper in their community.

This leaves a sizable minority, however, who are dissatisfied with the current options available and support the idea of another local daily newspaper. These people are equally likely to live in major urban centres or rural communities, but regionally they represent a higher proportion of readers in Atlantic Canada followed by Manitoba/Saskatchewan.

Comparing the three major urban markets, Montreal and Vancouver newspaper readers express a fairly high level of interest in another daily paper while Torontonians do not.

Underlying all the regional and market-specific considerations is the finding that the demand for another daily newspaper is highest among young readers and declines with age.



107

## 4.0 MAGAZINES

### 4.1 Overview

Certain magazine titles are published only three or four times a year, while others are issued as often as 52 times a year. But there are no magazines which come out more than once a week. This is an important distinction and should be kept in mind when comparing magazines to the "daily" media: television, radio and newspapers.

Among respondents to Environics' Media Study, 77 per cent of adults read magazines at least occasionally. Sixty-eight per cent say they have read a magazine within the past four weeks, and an additional nine per cent have read magazines but not within the past month. Less than one in four (23%) claim to have had no recent exposure to magazines at all.

**MAGAZINE READERSHIP\***  
(Source: Environics' Media Study)  
**% of Adult Canadians Who Have Read  
or Leafed Through a Magazine or Periodical**

Within the past four weeks	68
Within the past four months but not the past four weeks	9
None within the past four months	23

### 4.2 Heavy, Medium and Light Magazine Readers

Respondents to this study were asked to estimate the number of magazines or periodicals read or glanced through during the previous four weeks. The choices ranged from "none" to "five or more." For the purpose of analysis, respondents have been grouped and defined as follows:

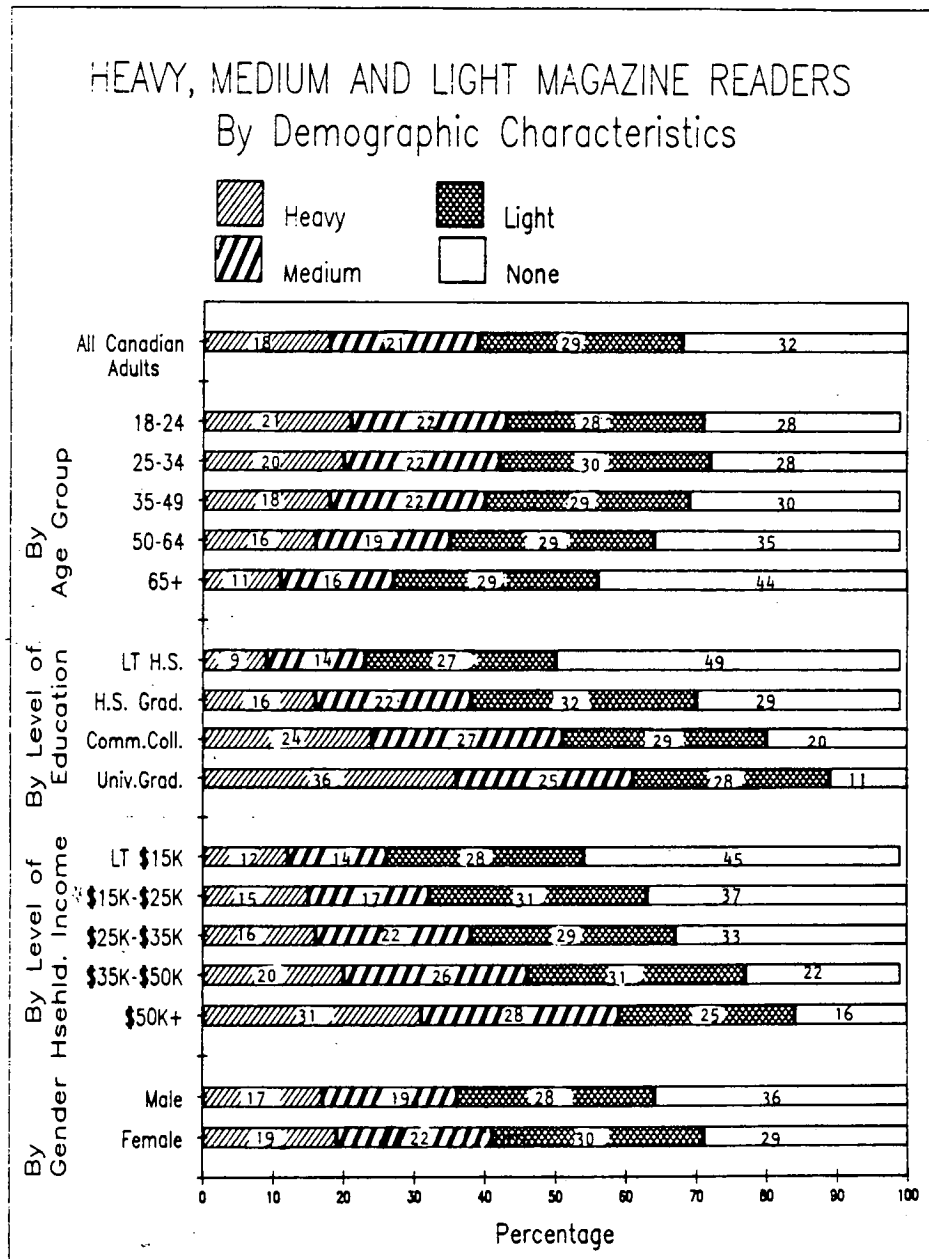
<u>Magazine User Type:</u>	<u>Estimated # of Magazines Read In Past 4 Weeks</u>	<u>% of Total Sample</u>
None	0	32
Light	1 to 2	29
Medium	3 to 4	21
Heavy	5 or more	18

\* Note: This is based on respondent's own estimates and may be understated.

The proportion of heavy, medium, light and non-readers is fairly consistent across all age groups up to age 50, with readership declining modestly only among Canadians aged 50 and older.

The incidence of heavy magazine readership increases substantially with both level of education and household income. Socio-economic status is the main demographic delineator of magazine readers overall.

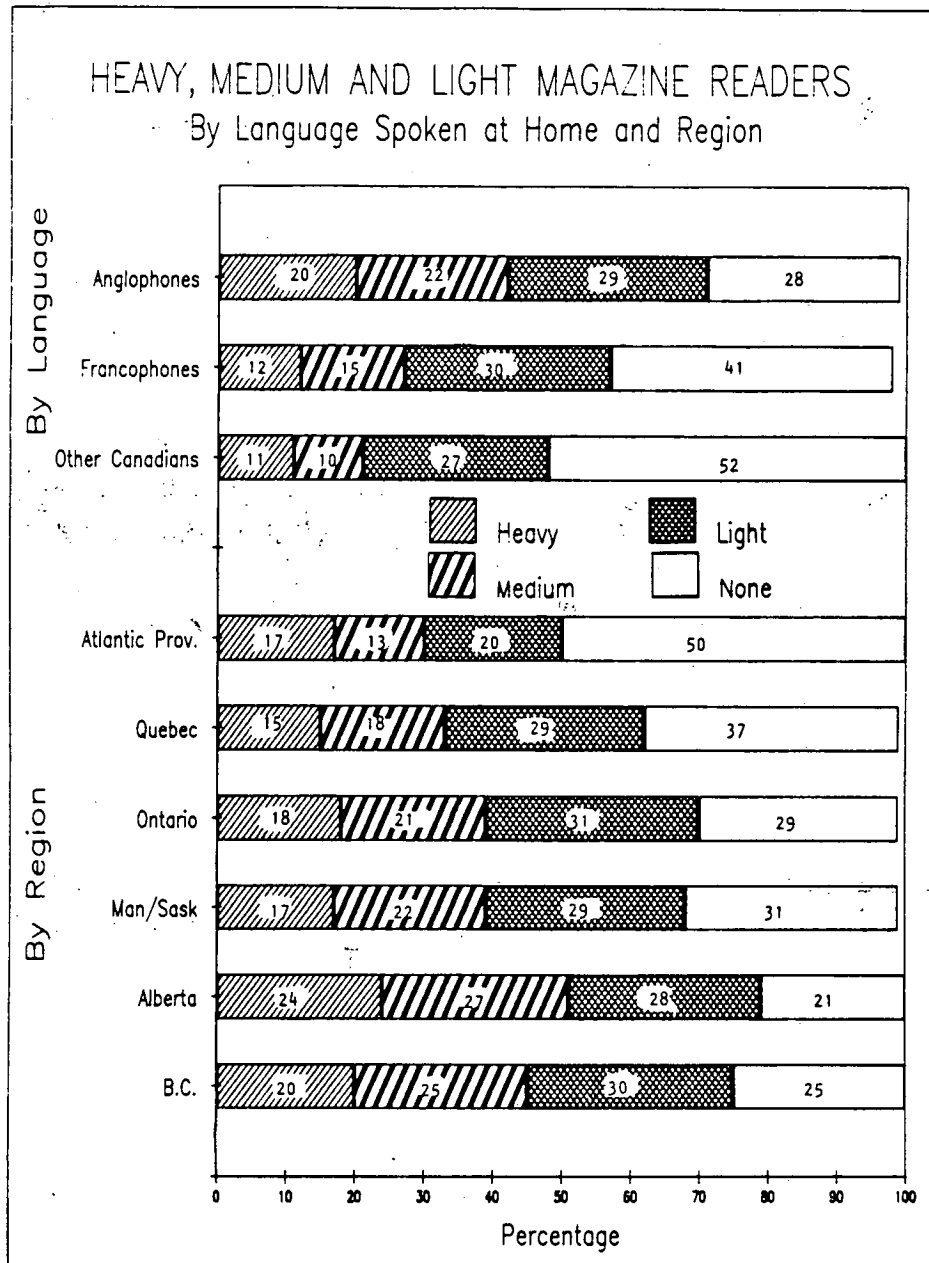
In terms of gender, women are somewhat more likely than men to say they have read a magazine in the past four weeks.



109

Language spoken at home is another important discriminator of magazine readership. Less than one in three anglophones (28%) claim to have read no magazines in the previous month compared with over four in ten francophones (41%) and over half of third language Canadians (52%). Larger numbers of anglophones also fall into the heavy user category than either francophones or "other" Canadians.

Regionally, magazine readership is lowest in the Maritimes and, based on respondent's own estimates, is highest in Alberta.



110

### 4.3 Readership of News, Business and Consumer Magazines

To determine the readership of different types of magazines, English speaking magazine readers were asked to declare their recent exposure to 28 different publications. For Quebecers, this list was expanded to include 14 French language publications for a total of 42 titles.

By category, the publications included in this survey were:

#### News magazines

Macleans  
Newsweek  
Time

And in Quebec:  
L'Actualité  
Le Lundi

#### Business magazines

Canadian Business  
Financial Post  
Moneywise  
Report on Business Magazine  
Your Money  
Financial Times

And in Quebec:  
Commerce  
Finance  
Les Affaires  
Les Affaires Plus

#### Consumer magazines

Canadian Living  
Chatelaine  
City and Country Home  
Destinations  
Empress  
En Route  
Flare  
Good Housekeeping  
Homemakers  
Influence  
National Geographic  
Prime Time  
Reader's Digest  
Recipes Only  
Saturday Night  
Toronto Life  
Toronto Magazine  
TV Guide  
Women's Day

And in Quebec:  
Châtelaine  
Clin d'oeil  
Coupe de Pouce  
Madame au Foyer  
Protect Yourself  
Protégez-vous  
Sélection de Readers Digest  
TV Hedbo

The question asked was whether Canadians read each of these magazines regularly (three or four of the last four issues), occasionally (one or two of the last four issues), less often or not at all.



### Canadian Magazines\*

Almost two-thirds of all adult Canadians have read one or more of the last four issues of a Canadian magazine. When calculated as a proportion of magazine readers, this amounts to a staggering 92 per cent of all readers.

	<u>% of Adult Canadians</u>	<u>% of Adult Canadian Magazine Readers</u>
Regular or occasional readers of Canadian magazines	<u>65</u>	<u>92</u>
Canadian news magazines	32	45
Canadian business magazines	19	26
Canadian consumer magazines	59	84

The Canadian market is extremely fragmented, however. The readership base of any one individual English language Canadian publication is no higher than 25 per cent of the general adult population and is as low as four per cent.

Within Quebec, regular or occasional readership of any one Canadian French language publication ranges from a high of 30 per cent of the general public to a low of seven per cent.

\* Note: American magazine titles are excluded from this analysis.

## Consumer Magazines

Consumer magazines - including Canadian and American, English and French language publications - collectively own the largest share of magazine readership but they also represent the largest number of individual magazine titles. Overall, 67 per cent of Canadian adults have read one or more of the last four issues of a consumer magazine.

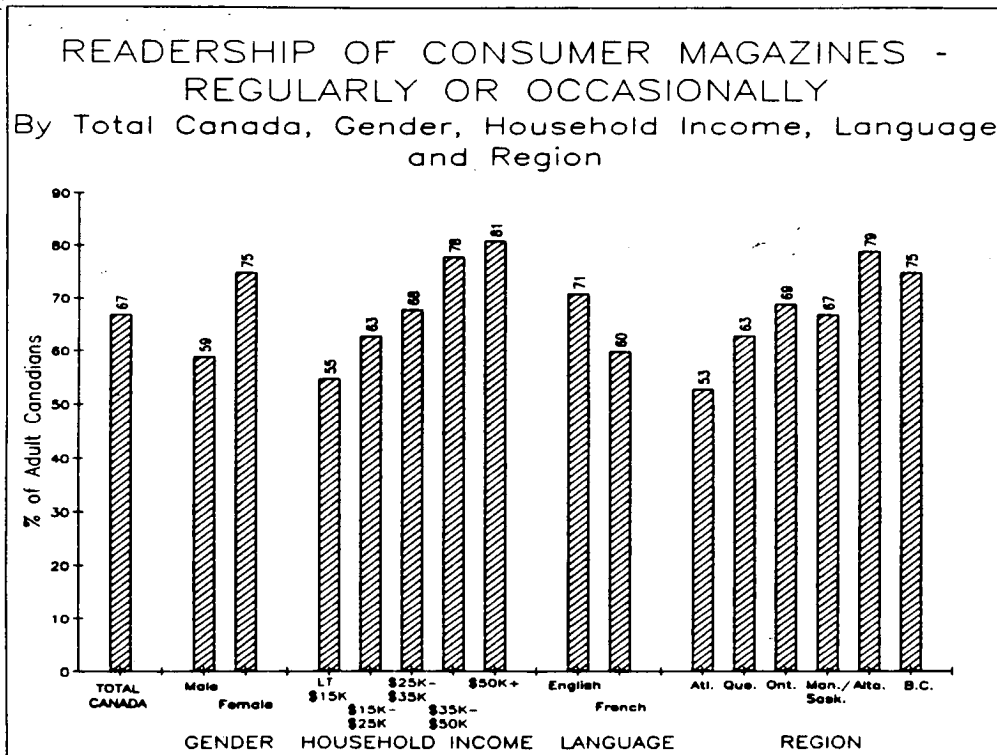
Despite the breadth of subject matter covered and the wide range of consumer magazines available in this country, there are a number of themes running through the data which help to characterize consumer magazine readers in general.

While consumer magazines are the most popular type of magazines among both men and women, more women (75%) than men (59%) read these magazines either regularly or occasionally.

Consumer magazines are equally popular among all age groups up to 50 years of age but their popularity drops off somewhat at that point.

Interest in consumer magazines increases with income and level of education from a low of 53 to 55 per cent at the bottom end of the socio-economic scale to a high of 81 to 83 per cent at the top end.

Anglophones are more likely than francophones (71% versus 60%) to read consumer magazines. Regionally, Alberta has the highest percentage of consumer magazine readers (79%), followed by British Columbia (75%). The Atlantic provinces have the lowest (53%). These figures reflect the variations in the readership of magazines in general.



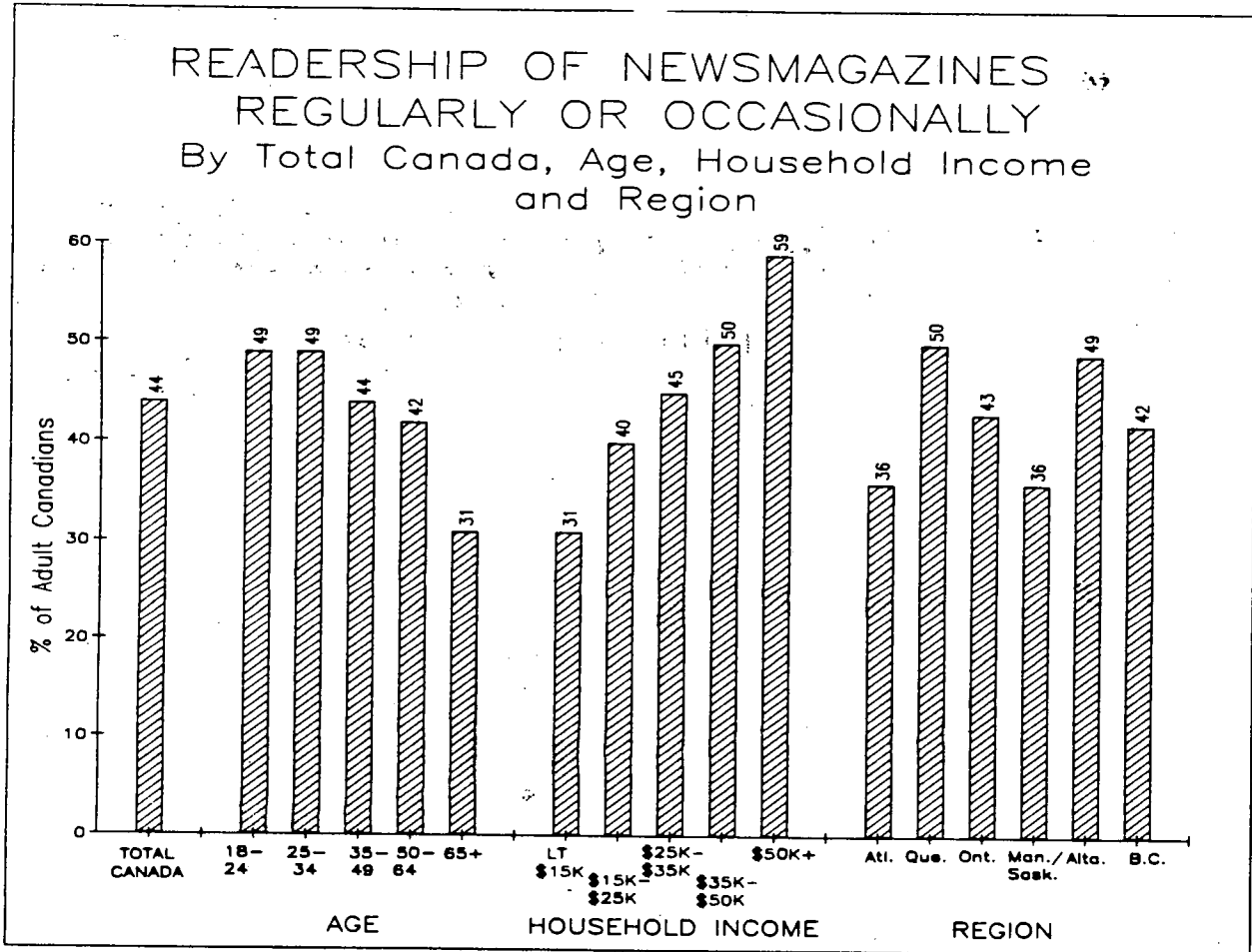
113

## News Magazines

Forty-four per cent of all adult Canadians have recently read a news magazine. There are fewer news than consumer magazines overall - this study included three English and two French language titles. The reader base of individual news magazines tends to be larger, therefore, than for most consumer magazines.

News magazines equally attract men and women; anglophones and francophones. Readership is somewhat skewed toward adults under the age of 35 and like all magazines, toward better educated and more affluent readers.

Regionally, Quebec and Alberta have the highest incidence of news magazine readership (at 50% and 49% respectively); the Atlantic provinces and Manitoba/Saskatchewan have the lowest (at 36% each).



## Business Magazines

This section focuses only on Canadian business magazines since American business magazines were not included in the study.

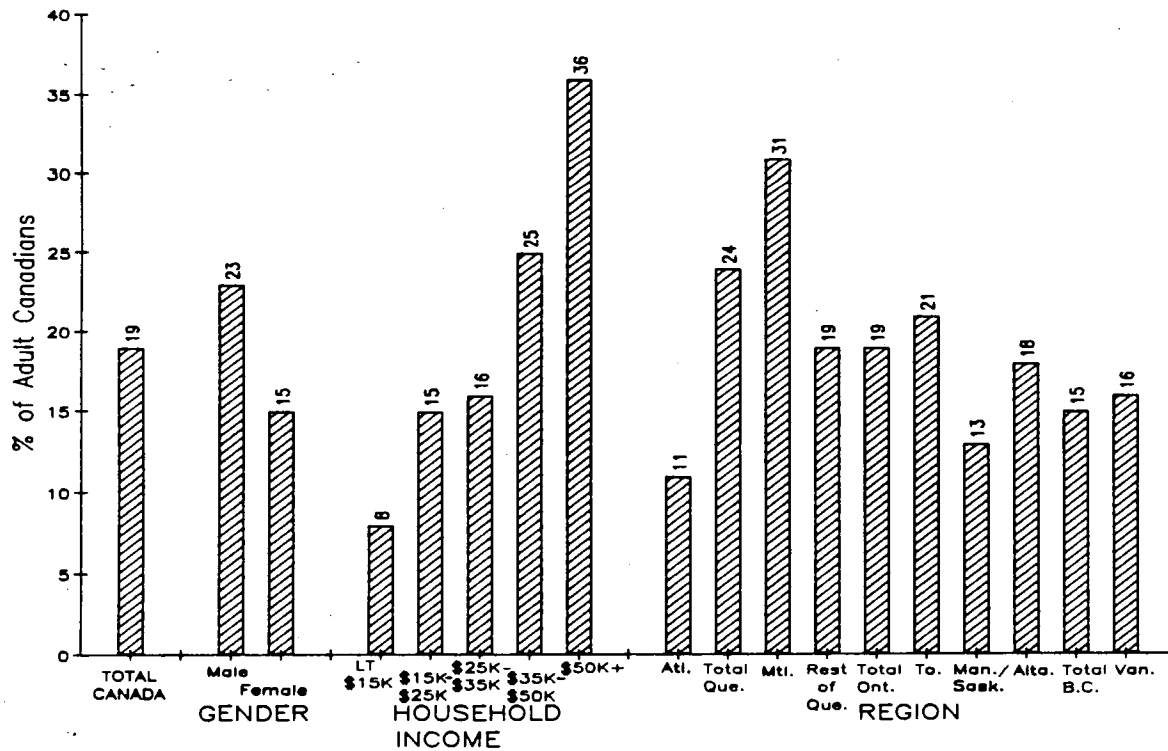
Canadian business magazines draw on a total readership base of almost one in five adult Canadians (19%). This is a net figure and represents the combined readership of six English and four French language magazines.

Readership is higher among men (23%) than women (15%) and is somewhat skewed toward middle aged Canadians (22%) although 16 per cent of young adults also read Canadian business magazines.

While anglophones and francophones are equally oriented toward this type of publication, the hottest market is in Montreal. Here, 31 per cent of all adults have recently read a Canadian business magazine compared with 21 per cent or less of Canadians in other parts of the country including Toronto and Vancouver.

As with other magazines, the incidence of reading business publications increases with education and income.

READERSHIP OF CANADIAN BUSINESS MAGAZINES - REGULARLY OR OCCASIONALLY  
By Total Canada, Gender, Income and Region



115

#### 4.4 Paid Versus Controlled Circulation Magazines

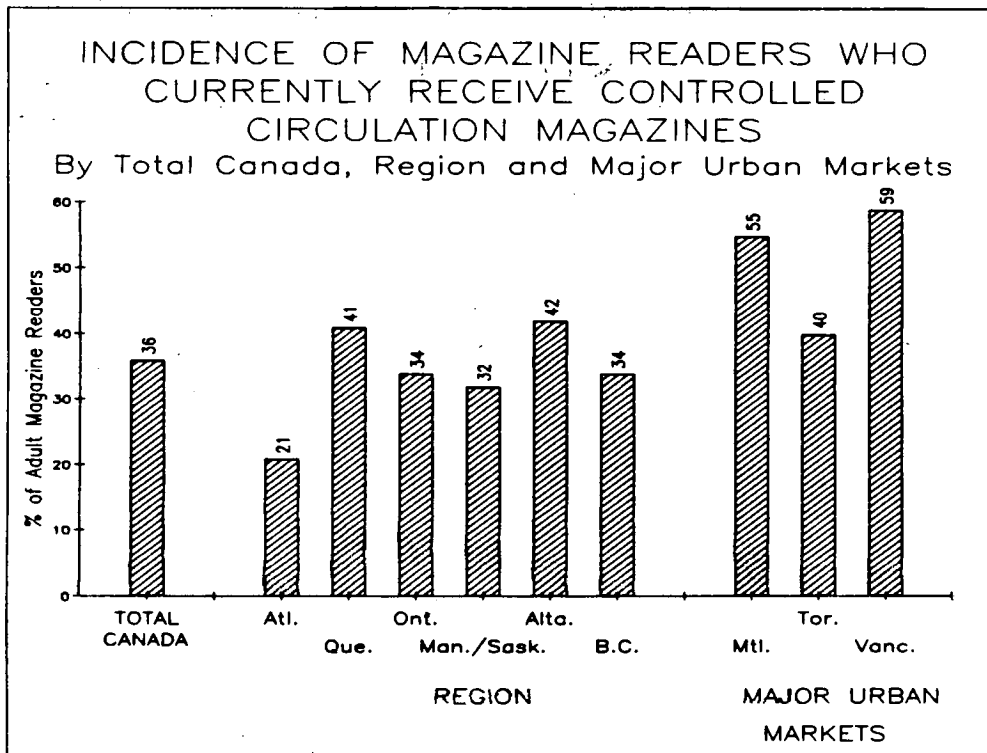
Publishers have long debated the value of magazines which readers do not pay for and in the jargon of the industry, are distributed to selected households "unordered and free of charge."

Some media experts argue that there is a weaker consumer commitment to magazines which are not bought and that the advertising rates for these magazines should be lower to reflect their more casual readership base. Others point to the success of controlled circulation magazines such as Homemakers and Madame du Foyer which have actively engaged a specific segment of the market or the Life magazines (Montreal, Toronto and Vancouver) which built sufficiently large segments of dedicated readers to switch to paid circulation.

At the present time, Canada's controlled circulation magazines include Homemakers/Madame au Foyer, Recipes Only, Influence and regional publications such as Goodlife and Ontario Living which are, for the most part, targeted toward women.

Just over one-third of adult Canadian magazine readers - or 25 per cent of Canadian households overall -- say that they currently receive controlled circulation magazines.

On a regional basis, distribution appears to be somewhat higher in Quebec and Alberta and is highest of all in major urban centres such as Montreal, Vancouver and, to a lesser extent, Toronto.



116

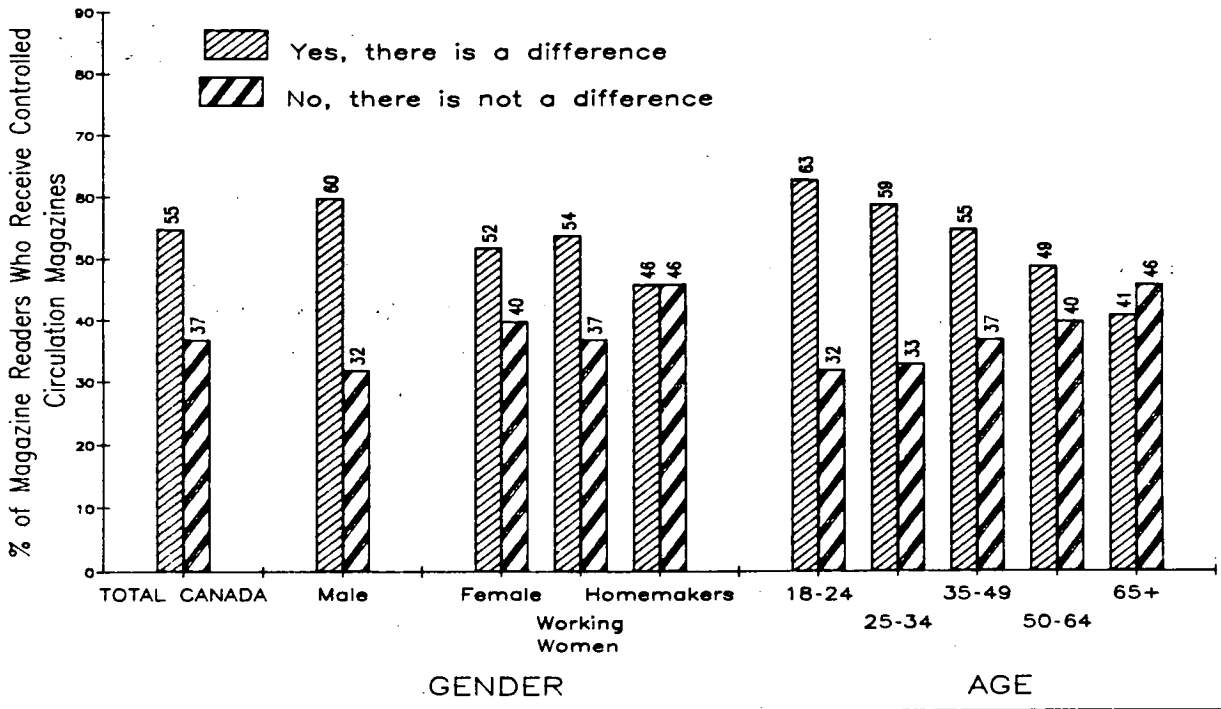
The issue is whether or not the recipients of controlled circulation magazines perceive a difference between "magazines which you subscribe to or buy off the newsstand and the ones that are delivered free of charge to your home?"

Just over half of the magazine readers who receive these magazines say there is a difference, while 37 per cent think there is not much difference. Of the remaining nine per cent, four per cent say that it depends on which magazines are being compared and five per cent do not know.

Men are more likely to perceive a difference than women; and working women more so than women who stay at home. Homemakers are, in fact, evenly divided in their assessment of controlled circulation magazines, with 46 per cent who feel there is a difference and 46 per cent who feel there is not.

In terms of age, young magazine readers are most likely to say that paid and controlled circulation magazines are different (63%) while seniors, aged 65 and over, are least likely (41%). Conversely, elderly magazine readers are most likely to say there is no difference (46%).

### THE LEVEL OF PERCEIVED DIFFERENCE OR SIMILARITY BETWEEN PAID AND CONTROLLED CIRCULATION MAGAZINES By Total Canada, Gender and Age



117

Those who said there is a difference between paid and controlled circulation magazines were asked to describe the differences in their own words.

Essentially, paid magazines are seen as having more readable content while free magazines are seen as vehicles for advertising. Few describe free magazines as junk mail but some people do say that paid magazines are better quality magazines and are more involving because there are more articles of personal interest and the articles are more in-depth and informative.

**PERCEIVED DIFFERENCES BETWEEN PAID  
AND CONTROLLED CIRCULATION MAGAZINES  
% of Magazine Readers Who Perceive That There  
is a Difference Between Paid and Free Magazines**

**Paid**

PAID have more articles of personal interest	20
PAID is thicker, larger in size	9
The articles in PAID are more in-depth, more informative	8
PAID are better quality, more professional format	6
PAID have more content, more articles	3

**Free**

FREE have more ads	25
FREE have fewer ads	5
FREE are more interesting, informative, better quality	3
FREE are junk mail, would not read them	2

One in ten comment on specific content differences and note that free magazines are more oriented toward homemakers, recipes, coupons and family issues while paid magazines tend to focus on news and current events.

Some people also tried to define the content philosophy of paid and free magazines. Paid magazines are described as more national in scope with a more diversified content range while free magazines tend to be more local or community oriented and are more targeted or narrow in their content.

## 4.5 Attitudes Toward Magazines

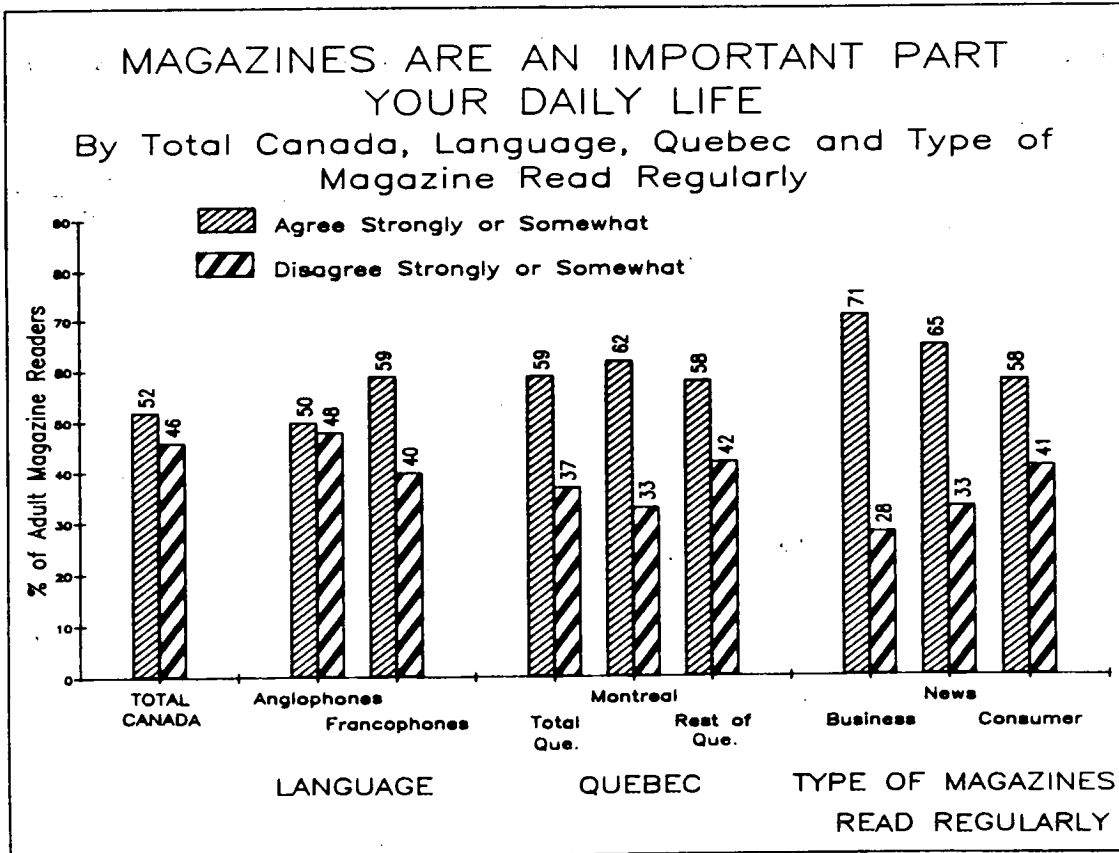
### 4.5.1 Magazines as Part of Daily Life

Even though magazines are not a "daily" medium, the majority of magazine readers agree that magazines are an important part of their daily life (52%).

There is very little difference in the attitudes of men and women or the young and the old toward the importance of magazines. Francophones are somewhat more likely than anglophones to agree strongly that magazines are important. Quebecers and, in particular, Montrealers, also place greater importance on magazines than readers living in other parts of the country.

The perceived importance of magazines increases with income and education. University graduates, more than any other demographic group, are committed to magazines on a daily basis.

Among the various magazine user groups, heavy readers are naturally most reliant on magazines but the percentage of business magazine readers who depend on magazines is also high (71%), followed by news magazine readers (65%) and readers of consumer magazines (58%).



119

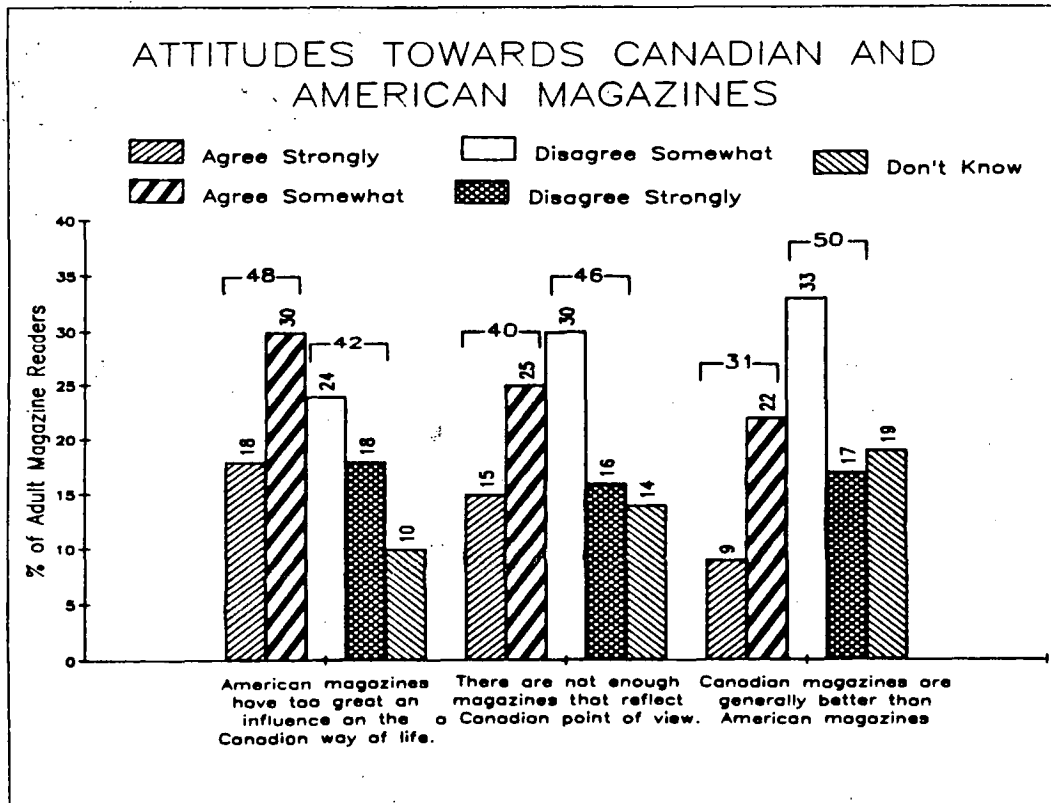


#### 4.5.2 Canadian Versus American Magazines

Canadians are ambivalent in their attitudes toward the influence of American publications in Canada and the need for more Canadian oriented magazines. Just under half of all magazine readers agree that American magazines have too great an influence on the Canadian way of life (48%) but almost as many disagree (42%). A slight plurality of readers say that Canada has enough magazines which reflect our own point of view (46%) but almost as many (40%) believe that there are not enough magazines which focus on Canada.

These diverging opinions tend to run across all demographic groups with no segment leaning significantly more to one point of view than another. This is also true geographically with no one region standing out for its distinctive attitudes. The exception is Toronto. Readers in Toronto are somewhat less threatened than other Canadians by the influence of American magazines and are more likely to say that there are enough Canadian oriented magazines (57%) than not (33%).

Three in ten magazine readers (31%) believe that Canadian magazines are generally better than their American counterparts. This view is widely held across all demographic groups and regions within the country, including Toronto. A larger number - 50 per cent - say that Canadian magazines are not better. A sizable minority - 19 per cent - have no opinion on the comparative value of Canadian versus American magazines one way or the other.



120

### 4.5.3 Censorship

Magazines are perceived as second only to television in having too much sexual content but this is a minority opinion. Overall, most Canadians say that magazines do not place too much emphasis on sex, violence or illegal drugs. Among magazine readers, there is little support for stricter censorship of magazines in general.

#### Violence, Sex and Illegal Drugs

One-third of all Canadians (33%) believe that there is too much sex in magazines. Somewhat fewer Canadians - 24 per cent - say that magazines are too violent and even fewer still - 16 per cent - say they focus too much on illegal drugs.

As with each of the other media, the level of sex and violence in magazines is of greatest concern to women. Concern increases with age but decreases with higher education and income.

The opinions of heavy magazine readers are not much different on the issue of sex, violence and drugs than the attitudes of the public in general.

#### ATTITUDES TOWARD SEX, VIOLENCE AND ILLEGAL DRUGS IN MAGAZINES\*

	<u>All Canadians</u>	<u>Heavy Magazine Readers</u>
% of those who say there is too much _____ in magazines		
Sex	33	36
Violence	24	23
Illegal drugs	16	19

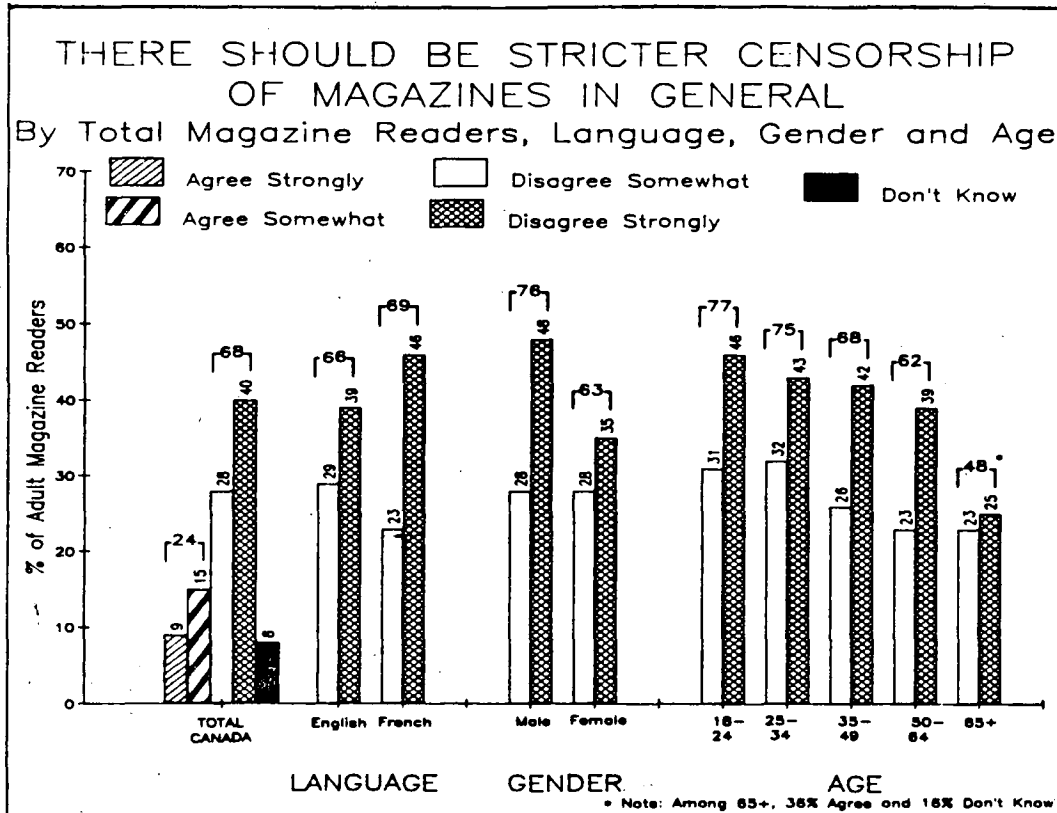
\* Note: There is no comparable 1969 Senate Commission data on sex, violence and drugs in magazines.

There is strong opposition to censorship of the print media overall. Like newspaper readers, most magazine readers (68%) do not support stricter censorship of magazines; more than half of those who are against censorship are strongly opposed (40%).

Only one in four (24%) are in favour of magazine censorship and eight per cent have no opinion one way or the other.

Equal proportions of anglophones and francophones are opposed to the censorship of magazines, but more francophones are strongly opposed.

Once again, gender, age and socio-economic status have a direct bearing on readers' attitudes, but even among women, the elderly and lower status Canadians, the balance of opinion is against stricter magazine censorship.



#### 4.5.4 Government Grants and Subsidies

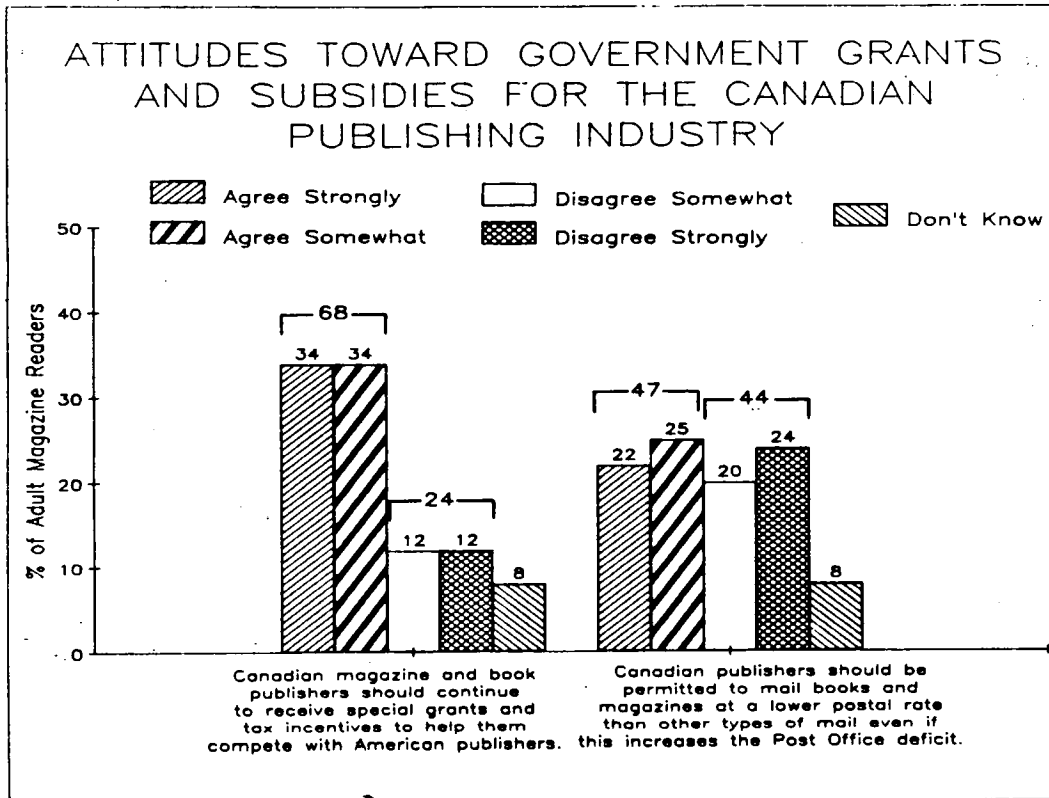
The Canadian market for books and magazines is fragmented in terms of its interests; there are great distances between densely populated markets; the readership base for books and magazines is smaller vis a vis other media and there is intense competition from American book and magazine publishers.

For these and other reasons, the Canadian publishing industry has faced a Catch 22 situation: the need for broad distribution and slick, high quality products to compete with American publications on the one hand; the attendant high cost and the potential for low returns on the other.

The Canadian publishing industry has long argued that it needs some form of government assistance to survive. A majority of Canadian readers supports this view. Almost seven in ten (68%) agree that "Canadian magazine and book publishers should continue to receive special grants and tax incentives to help them compete with American publishers."

Heavy, medium and light magazine readers are equally in favour of special grants and tax incentives for Canadian publishers, as are anglophones and francophones (although more francophones feel strongly about this issue - 45% - than anglophones - 31%).

The majority of magazine readers across all demographic groups support grants and tax incentives but those most in favour include: women (73%) - both working women and homemakers, young people aged 18 to 24 (75%) and upscale Canadians - those with household incomes above \$50,000 or with some post-secondary education (71-73%).



Attitudes toward the subsidization of postal rates are more ambivalent. Almost one-half - 47 per cent - of adult magazine readers agree that "Canadian publishers should be permitted to mail books and magazines at a lower postal rate than other types of mail, even if this increases the Post Office deficit." Nearly as many - 44 per cent - disagree, however, while eight per cent have no opinion.

Other Environics' research shows the Post Office to be one of the most contentious corporations in the country. One suspects - given magazine readers' support for special grants and tax incentives - that opposition to postal subsidies is related more to mounting public ire over increasing postal rates in general and perceived inefficiencies within the postal system itself than to Canadian publishers receiving some kind of assistance with their distribution through the mail.

As with attitudes toward grants and tax incentives, francophones are more strongly in favour of postal subsidies than anglophones. Support is also somewhat higher among women, young people and upscale magazine readers.

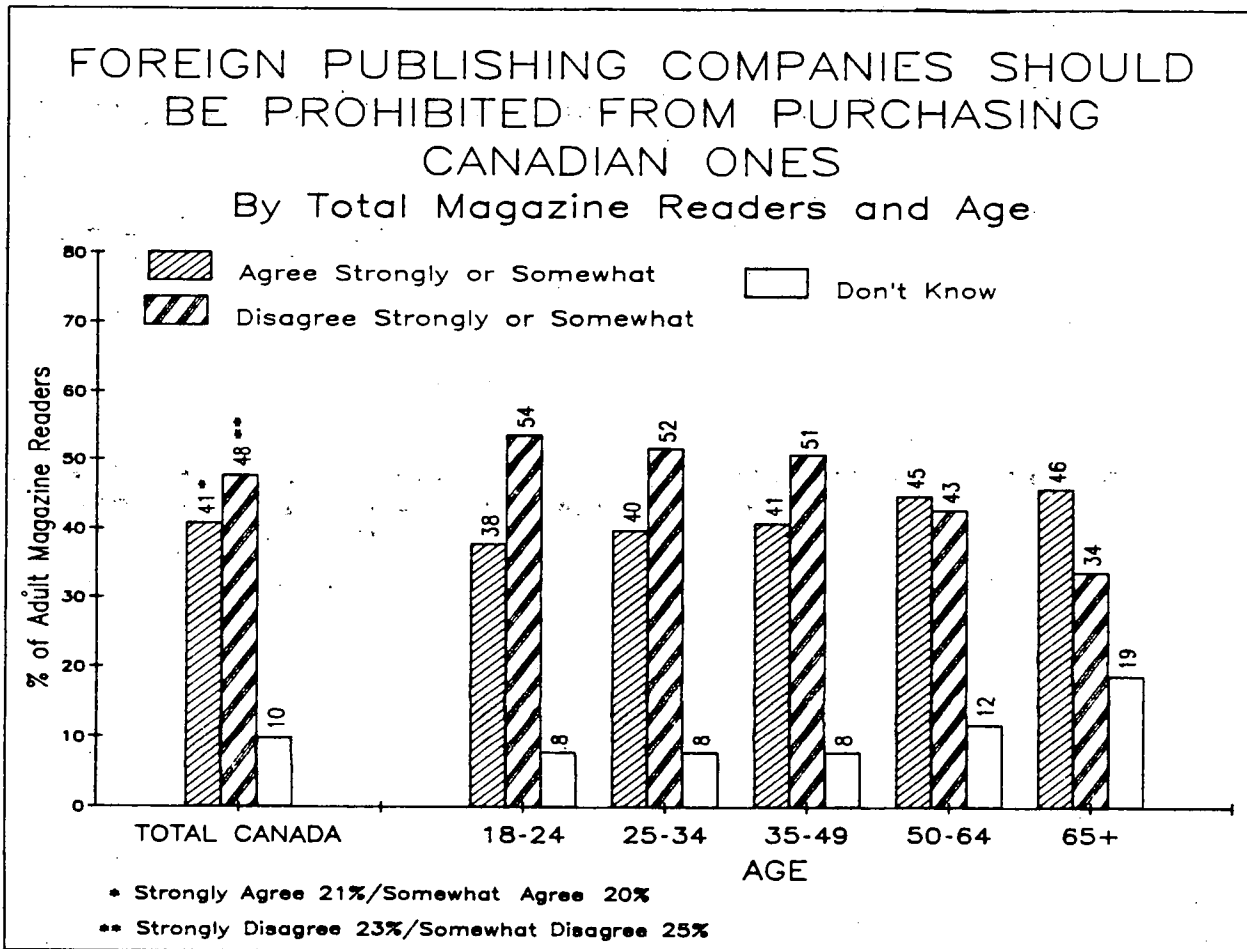
#### 4.5.5 Foreign Ownership

Canadians are more sanguine in their views about foreign ownership of the Canadian print media than they are about ownership of Canadian television and radio stations.

Among magazine readers, a minority - 41 per cent - agrees that "foreign publishing companies should be prohibited from purchasing Canadian ones." A larger number - 48 per cent - disagrees.

This division of opinion is consistent across the board: among men and women; anglophones and francophones; heavy, medium, and light readers; and people living in all parts of the country.

Age is the only discriminator, with people under the age of 50 more opposed to the protection of Canadian publishing companies from foreign ownership and people aged 50 and over more in favour.



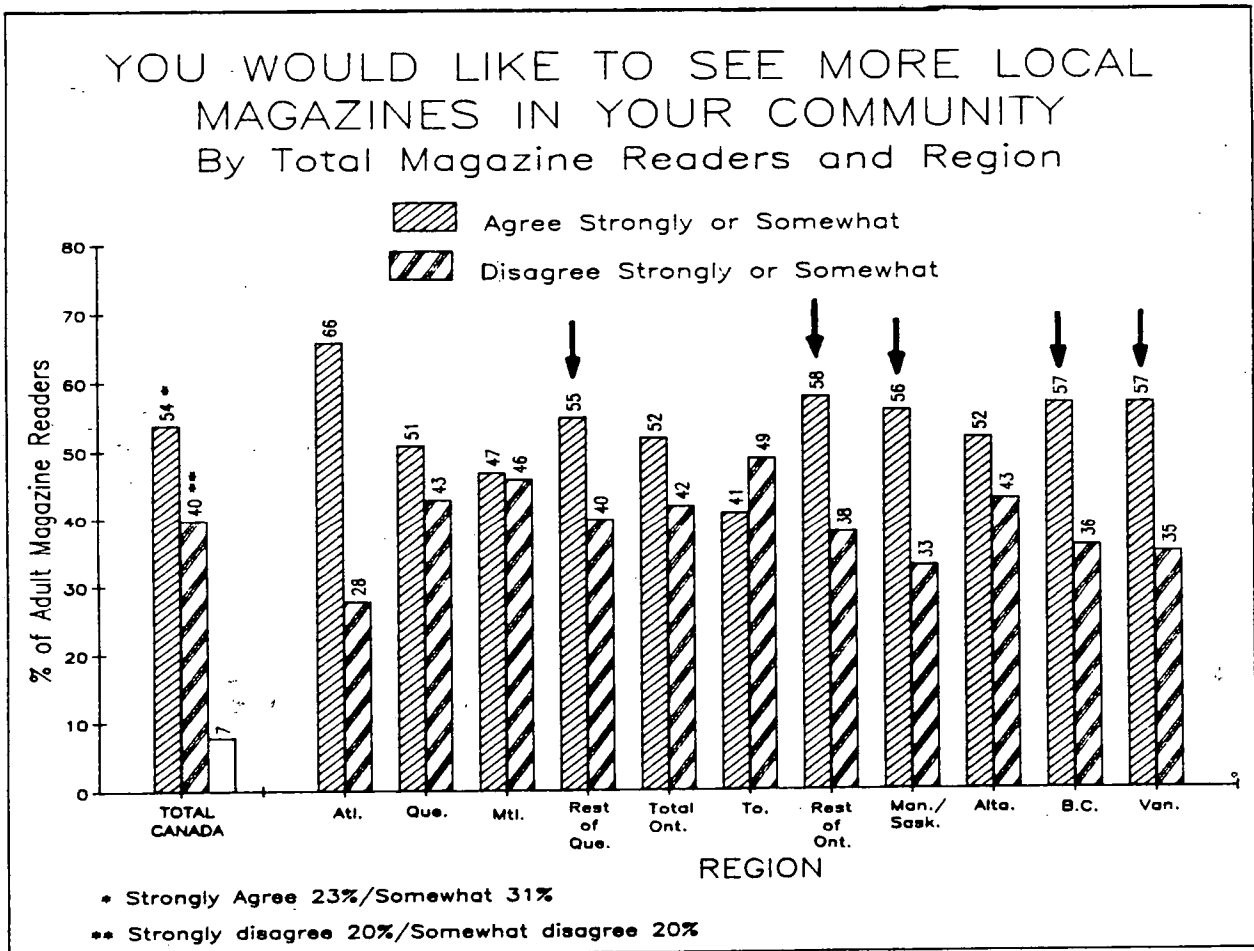
124

#### 4.5.6 Competition

The majority of magazine readers would like to see more local magazines in their community (54%). This is the only medium where users are more in favour than opposed to increased local selection.

Maritime readers are the most eager for more local magazines but this is also the area of Canada where the incidence of non-readership of magazines is the highest.

Aside from Atlantic Canada, the most underrepresented markets for local magazines are: Quebec outside of Montreal (55%); Ontario outside of Toronto (58%), Manitoba/Saskatchewan (56%); and British Columbia, including Vancouver (57%).



125

## 5.0 COMPARATIVE EVALUATION OF ALL FOUR MEDIA

This chapter of the report compares and contrasts the four media. First, we look at 12 personality traits which measure the intellectual and emotional impact of the media. Here we examine how the media affect people. Next, we compare the media as sources for various types of information. We examine which medium is relied upon most for a range of 16 information categories.

### 5.1 Profile of Each Medium

The dominant characteristics that distinguish each of the four media tend to be related to their different formats and the opportunities or limitations attendant upon those formats. Television, for example, is seen as the most entertaining and exciting medium; radio as the most soothing and relaxing; and newspapers as the most serious. In each instance, the allocation of specific "personality traits" appears obvious and is consistent with the nature of the medium and the type of programming or content with which each is most often associated.

In other areas, however, the association is less obvious and, therefore, more telling.

Television is seen as the most provocative medium with a singular ability to upset Canadian viewers.

Television has the edge over newspapers as the most educational, informative, open or frank, honest in reporting news events and the most believable medium, but the perceptual gap between the two is relatively narrow.

Television and newspapers are equally identified as being the most useful or helpful medium.

Radio has a somewhat lower profile than either television or newspapers. Aside from the soothing/relaxing characteristic which radio shares to some extent with television, less than 15 per cent of Canadians most identify radio with any of the listed positive attributes.

Magazines are even more amorphous and less clearly defined than radio. The highest level of advantage for magazines is for "most educational" but with only 15 per cent of Canadians choosing magazines as "most educational", magazines still score well below television (47%) and newspapers (15%) on this characteristic.

## CHARACTERISTICS WHICH DISTINGUISH EACH OF THE FOUR MEDIA

% of Canadians Who Identify  
Each of the Four Media as Most \_\_\_\_\_

	<u>Television</u>	<u>Newspapers</u>	<u>Radio</u>	<u>Magazines</u>	<u>More Than One</u>	<u>None/DK</u>
Entertaining	80	3	9	4	3	1
Exciting	77	6	7	4	2	3
Upsetting	51	19	5	4	4	17
Educational	47	23	5	15	7	3
Informative	44	32	12	5	6	1
Open or frank	40	23	13	10	7	6
Honest in reporting news events	36	24	13	6	11	10
Believable	34	28	12	10	7	9
Useful or helpful	33	32	14	11	7	4
Serious	30	37	10	11	7	6
Soothing and relaxing	30	10	44	10	3	4
Boring	15	20	20	22	4	19

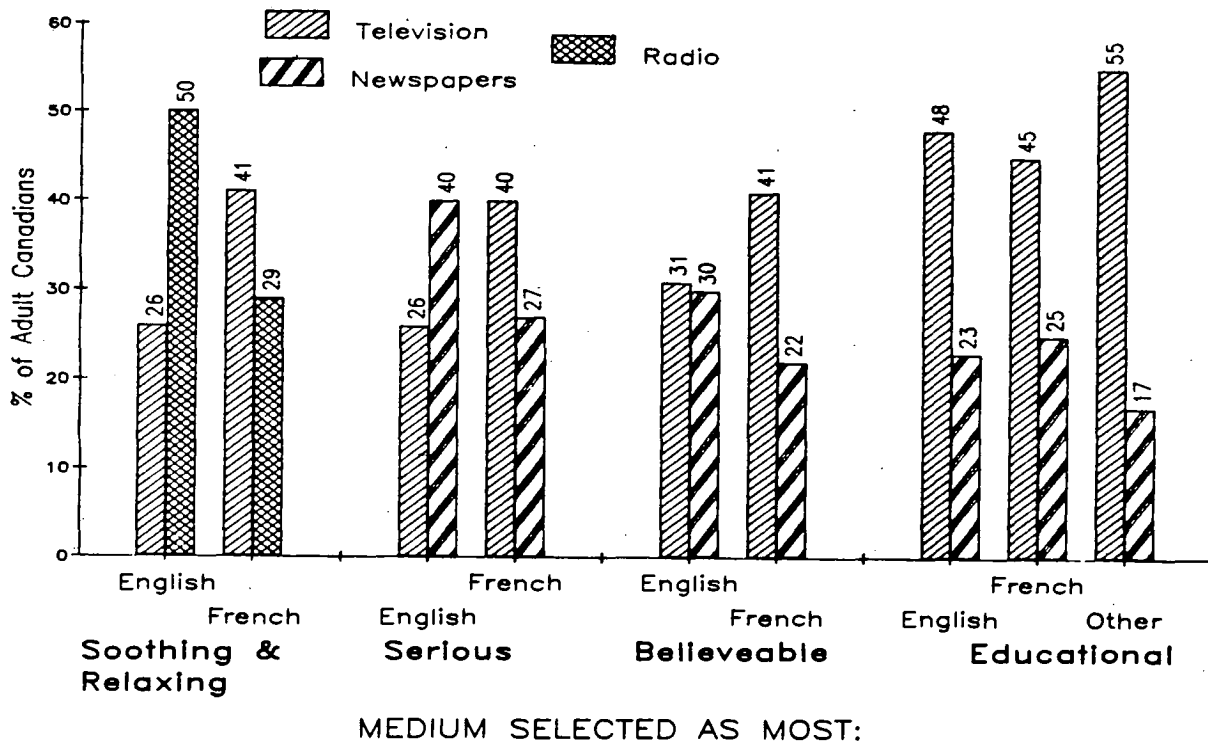
As we have seen in other sections of this report, the attitudes of French-speaking Canadians toward the media are sometimes quite distinct from those of English Canadians.

- Anglophones identify radio as the most soothing and relaxing medium; francophones most often associate this characteristic with television.
- Anglophones are most likely to pick newspapers as the most serious medium and to divide their votes for the most believable medium between newspapers and television. Francophones, on the other hand, tend to say that television is both the most serious and the most believable of the four media.

The role of television as an educator is most important to Canadians whose home language is other than English or French.



## LANGUAGE RELATED DIFFERENCES IN PERCEPTIONS OF "THE" FOUR MEDIA



### 5.2 News and Information Sources

#### News Sources

Since the 1950's, the Roper Organization has been asking Americans which of the four media is their main source of news about what is going on in the world today. Initially, newspapers were the dominant news medium. Each year, television grew increasingly more important as a major news source and by 1963, it surpassed newspapers. In 1984, the last year for which figures are available, 51 per cent of Americans turned to television as their main news source compared with 31 per cent who turned to newspapers, 11 per cent to radio and just three per cent to magazines.

Although comparable yearly data are not available for Canada, the 1969 Senate Commission Report on Mass Media asked Canadians to identify the medium which is most important in providing international, national and local news.

Television, already the dominant source for international and national news in 1969, has grown even more powerful over the past 17 years, at the expense of newspapers and radio.

128

For local news, television came third in 1969, behind newspapers and radio. It has now moved to first position and has increased its share by 16 percentage points.

**MEDIA SOURCE RELIED ON MOST OFTEN FOR  
INTERNATIONAL, NATIONAL AND LOCAL NEWS**

	% of Adult Canadians		
	1986 Environics' Media Study	Environics' Media Study Data Repercentaged to Exclude "More Than One"	1969 Senate Commission Report on Mass Media
<u>International News</u>			
Television	63	65	56
Newspapers	20	21	24
Radio	9	9	12
Magazines	3	3	6
More than one	4	--	--
None/DK	2	2	2
<u>National News</u>			
Television	66	69	48
Newspapers	18	19	29
Radio	9	9	19
Magazines	1	1	2
More than one	4	--	--
None/DK	2	2	2
<u>Local News</u>			
Television	39	41	25
Newspapers	32	34	39
Radio	23	24	33
Magazines	*	*	--
More than one	5	--	--
None/DK	1	1	3

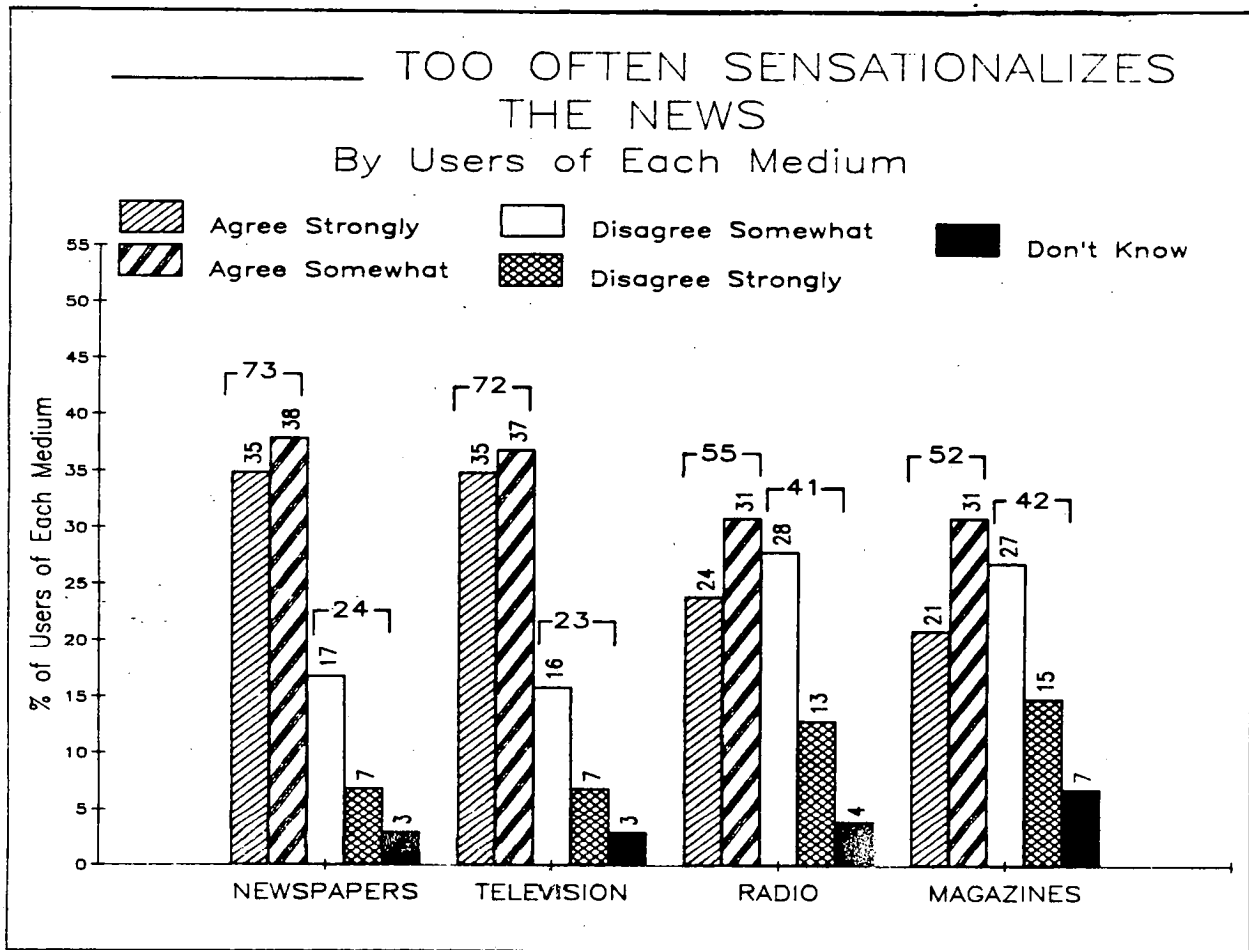
\* Less than 0.5%

129

## Sensationalizing the News

Of the four media, television and newspapers are most often chosen by Canadians as "open and frank," "informative," "believable" and "honest." They are also perceived as the major media which "too often sensationalize the news." As the two main news sources in this country, it is perhaps natural that Canadians would feel more strongly about how the news is disseminated from television and newspapers.

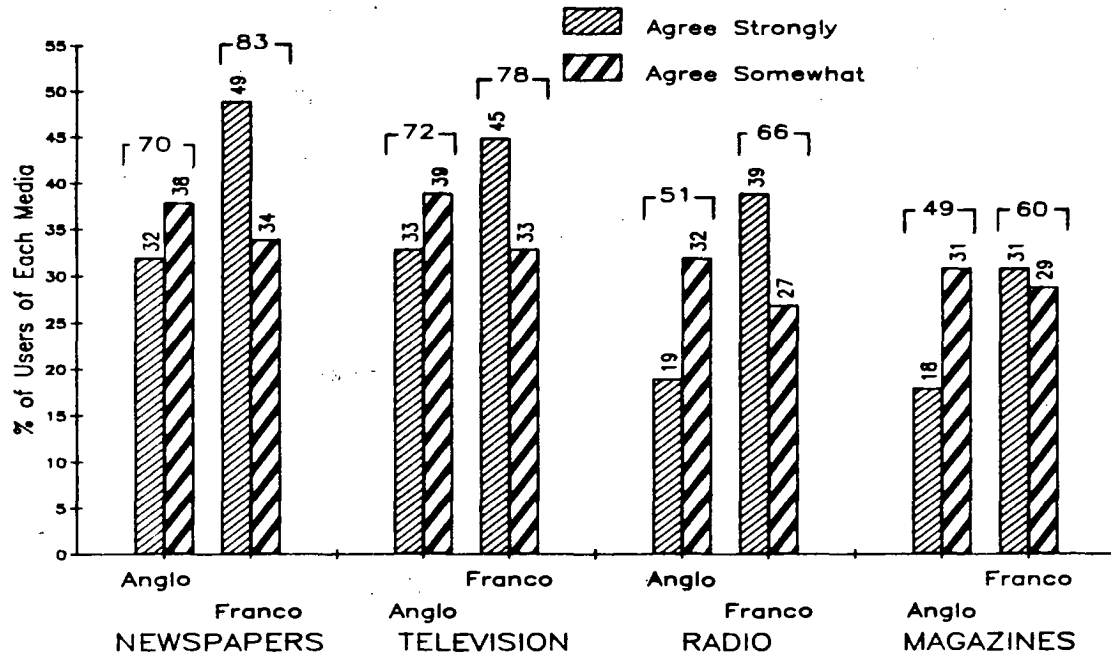
The majority of media users, however, feel that all four media are guilty of sensationalism to some degree.



Francophones are particularly sensitive toward sensational news reporting in all four media. They not only agree more often, but also agree more strongly than anglophones that the news media are overly sensational.

## TOO OFTEN SENSATIONALIZES THE NEWS

By Anglophone and Francophone Users of Each Medium



### Information Sources

#### Television

The informational strengths associated most often with television include news about the federal and provincial governments. More Canadians also turn to television over newspapers when they want a more detailed report and analysis of national or international events in the news. The new dominance of television for in-depth analysis, once the exclusive preserve of the print media, speaks to the success of public affairs programs such as *The Journal*, *W5*, *Le Point*, *The Fifth Estate* and *60 Minutes*.

Television has also made inroads in information areas which were once almost exclusively identified with radio. Today, more Canadians rely on television than radio for information about the weather, and sports scores. They are also more likely to turn to television to find out about an emergency or crisis. In 1969, Canadians said that in an emergency situation, they would turn to radio over television by a ratio of 2 to 1.

131

## **Newspapers**

Of all the media, newspapers play the most pivotal role in keeping people informed about what is going on in their community. It is the medium most relied upon for information about local entertainment, and for a detailed analysis of local or community news. Newspapers are close on the heels of television as the most important source of local news.

Newspapers also hold a substantial edge over other media in terms of consumer information. Canadians are most likely to turn to newspapers to find out about new products or services they might like to buy or try. They also most often turn to newspapers for vacation and travel information.

Finally, newspapers are the main source of economic and business news, followed closely by television.

## **Magazines**

When Canadians want to learn about new things or ideas, they are as likely to turn to magazines as to television. Magazines, along with television, also figure prominently as a source of health and fitness information. In terms of consumer information, newspapers are the most popular source but magazines and television are tied in second spot. Overall, magazines inform about changing lifestyles, introducing Canadians to new trends in thought and in the marketplace.

## **Radio**

People turn less to radio for information than for emotional contact. Most radio users frequently listen to news and weather reports on the radio but they also listen to music. And it is the music which is "soothing and relaxing," not radio's informational content. Perhaps this is why radio is not identified as the number one source for any of the different types of information included in this section.

A considerable number of Canadians rely on radio for weather and sports scores and would turn first to radio to find out about an emergency or crisis. But in each instance, radio is second to television as the primary source of information.

## INFORMATION SOURCES

% of Canadians Who Most Rely on Each  
of the Four Media For \_\_\_\_\_

	<u>Television</u>	<u>Newspapers</u>	<u>Radio</u>	<u>Magazines</u>	<u>More Than One</u>	<u>None/DK</u>
Information about the federal government	52	25	8	2	6	8
Information about the provincial government	47	28	9	1	7	8
A more detailed analysis of national or international news	44	34	8	7	4	3
The weather	49	5	37	*	7	2
Information about an emergency or crisis	41	14	36	1	6	3
Sports scores	35	14	23	*	7	22
Information about local entertainment	16	58	16	2	3	5
A more detailed analysis of local or community events	26	51	16	1	4	3
Vacation or travel information	11	45	5	15	4	19
Economic or business news	30	37	6	6	4	17
Finding out about products or services	21	36	3	19	6	15
Learning about new things and ideas	31	19	4	31	7	8
Health and fitness information	28	17	5	27	4	20

In almost every information category, francophones are more dependent on television than anglophones. In absolute terms, they rely more on television than newspapers for economic and business news; more on television than magazines for health and fitness information.

They are also much less likely than anglophones to turn to radio for the weather, sports scores or information about an emergency or crisis.

## 6.0 ADVERTISING

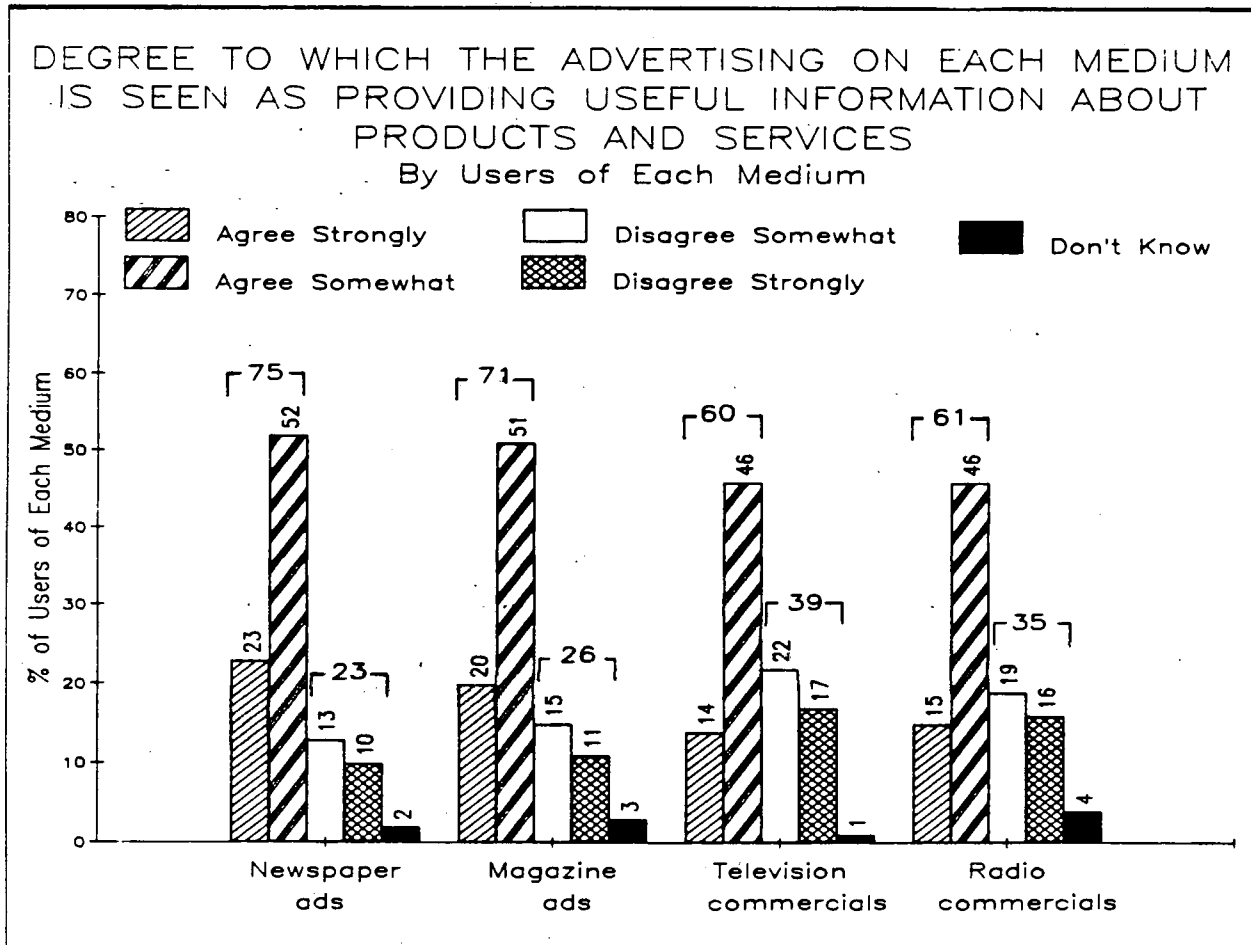
This section focuses on advertising and includes a discussion of how advertising is perceived on each of the four media, the degree of public support for banning specific product and service advertising, Canadians' most memorable advertisements, influence of the consumer media on the purchase of business products or services, and several questions relating exclusively to television commercials such as sex-role stereotyping and representation of visible minority groups.

### 6.1 Perceived Impact of Advertising on Each of the Four Media

#### As a Source of Useful Information

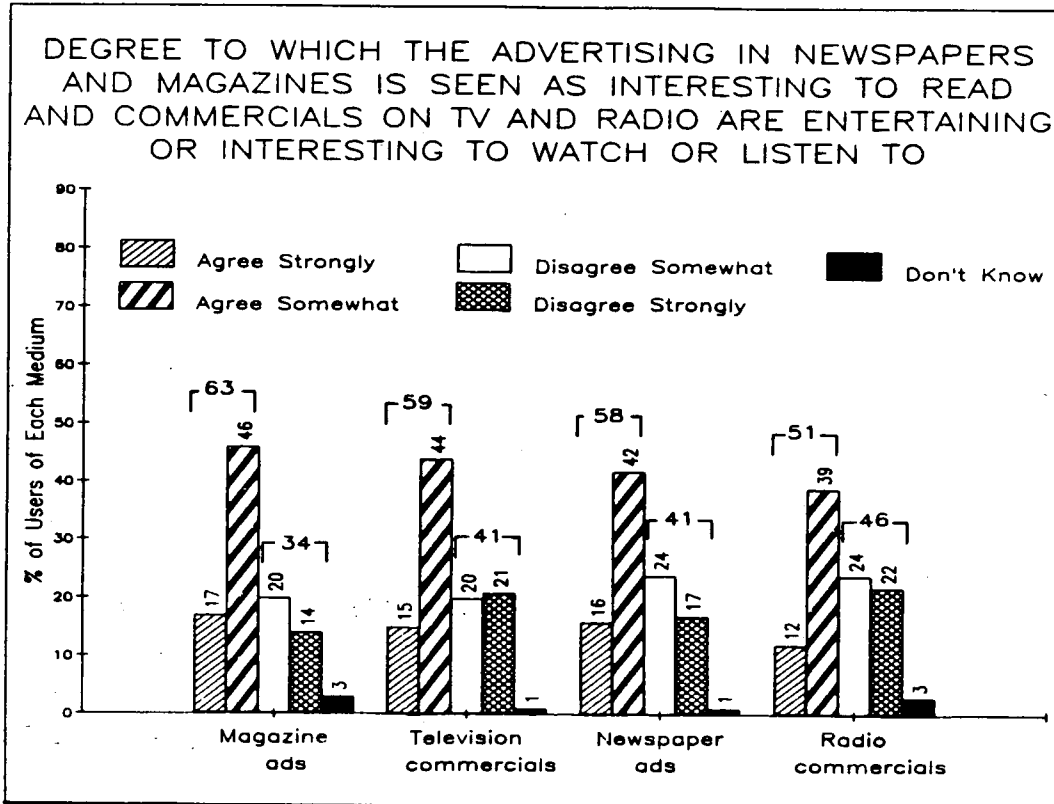
Each of the media is seen as having commercial advertising that provides useful information about products and services. Newspaper and magazine ads are particularly successful in this regard.

There are few differences of opinion between men and women, the young and old, or among anglophones, francophones and third language Canadians toward the informative nature of advertising.



## Interesting or Entertaining

Most media users also say that newspaper and magazine ads are interesting to read and that television and radio commercials are entertaining and interesting to watch or listen to. Magazine advertising has the highest level of positive support on this dimension, followed by television and newspaper advertising and then by radio.



While women are slightly more likely than men to agree that magazine and newspaper advertising is interesting to read and television commercials are entertaining or interesting to watch, the balance of opinion for both men and women is more positive than negative. Aside from these minor gender differences, media users in general share similar views about the level of interest generated by magazine, newspaper and television advertising, regardless of age group or linguistic orientation.

The perception that radio commercials are interesting, however, is skewed toward young people and drops from a high of 60 per cent among radio listeners aged 18 to 24 to a low of 47 per cent among listeners aged 35 and over. Anglophones and third language Canadians tend to be more positive than negative while francophones are slightly more negative than positive. There is little difference, however, in the attitudes of men and women toward this particular aspect of radio commercials.

135

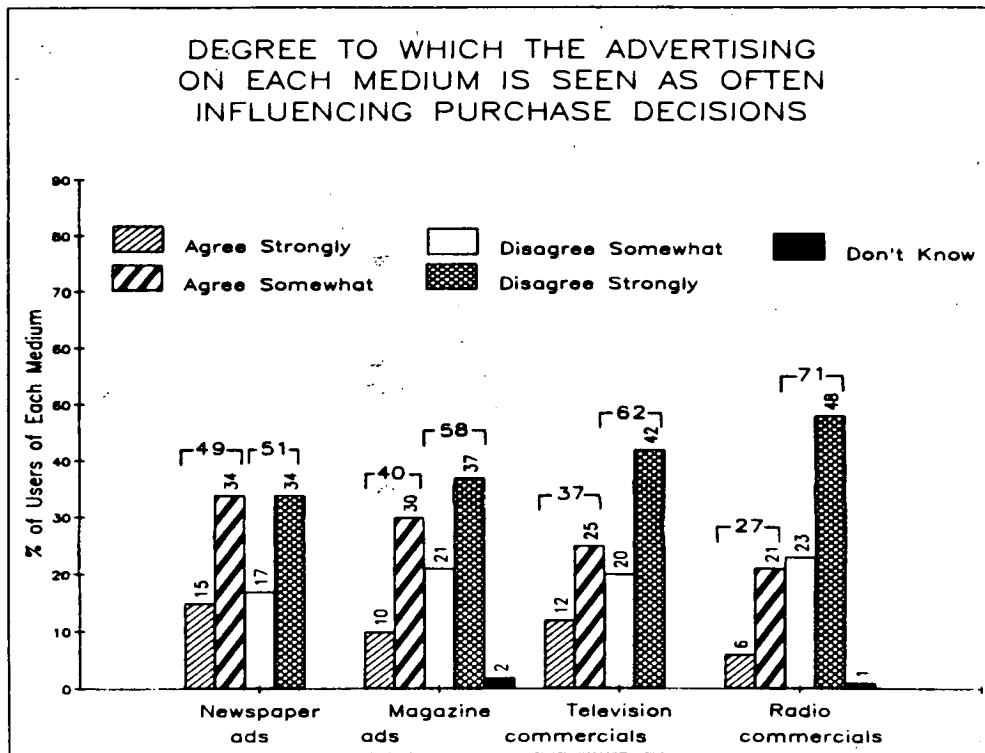


**DEGREE TO WHICH RADIO COMMERCIALS ARE SEEN AS ENTERTAINING OR INTERESTING TO LISTEN TO**

	% of Radio Listeners		
	Agree	Disagree	DK/NA
<b>By age:</b>			
18-24	0	39	1
24-34	53	45	2
35-49	46	50	4
50-64	47	48	4
65+	47	46	7
<b>By language spoken at home:</b>			
English	52	45	3
French	45	50	5
Other	61	36	3
<b>By gender:</b>			
Male	0	47	3
Female	53	44	4

**Persuasive**

Canadians are reticent to admit that they are influenced by advertising. The largest number of media users agree that newspaper ads often influence their decisions to purchase things (49%), followed by magazine (40%), television (37%) and radio advertising (27%).



136

Anglophones and francophones are dramatically different in their open acceptance of advertising as a persuasive medium. A considerable number of anglophones agree that they are often persuaded by advertising, while francophones totally reject this notion. The level of disagreement among francophones ranges from a low of 69 per cent for magazine ads to a high of 86 per cent for radio commercials. And in each instance, the vast majority of francophones disagree strongly.

Third language Canadians are more similar to anglophones than francophones in their views toward the influence of advertising on purchase decisions.

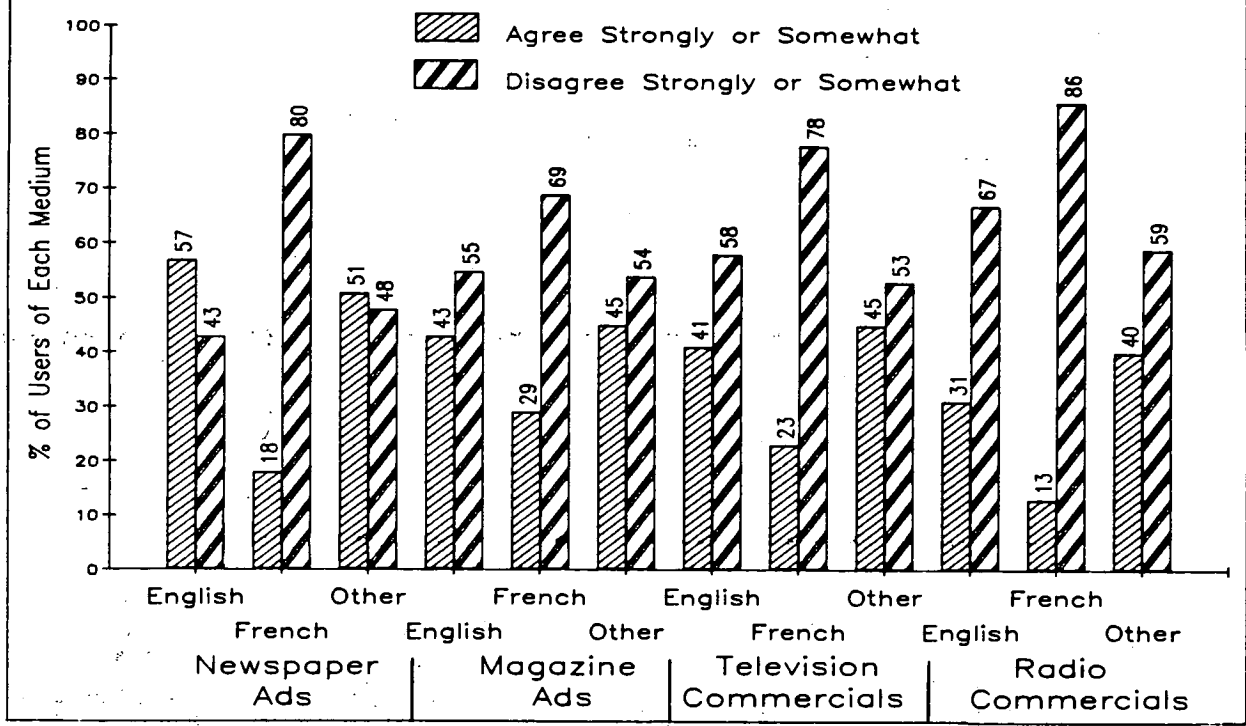
The differences of opinion within English Canada are minor. Several notable exceptions:

- Newspaper readers in Manitoba/Saskatchewan are somewhat less inclined than other English Canadians to agree that newspaper ads affect their purchase decisions (% agreeing: Manitoba/Saskatchewan 51%, total English Canada 57%)
- Television viewers in the Atlantic provinces are more likely than others to acknowledge the persuasive nature of television commercials (% agreeing: Atlantic provinces 52%, total English Canada 41%)
- Radio listeners in the Atlantic provinces and Toronto - but not Ontario as a whole - are more favourable towards radio advertising than others (% agreeing: Atlantic provinces 39%, Toronto 38%, total English Canada 31%)

Age is a less spectacular delineator of people's attitudes toward the influence of advertising than language but there is a consistent theme throughout. A majority of all 18 to 24 year old media users admit that they are persuaded by newspaper, magazine, television and radio advertising to buy things. Beyond age 25, however, the level of agreement drops below 50 per cent.

# DEGREE TO WHICH THE ADVERTISING ON EACH MEDIUM IS SEEN AS OFTEN INFLUENCING PURCHASING DECISIONS

By Language Spoken At Home



## 6.2 Most Memorable Ad

Canadians were asked: "Of all the advertising that you have seen, heard or read in the past month, which ad or commercial sticks in your mind the most?" Since interviewing was conducted last November, the time reference for "most remembered advertising" is the autumn of 1986.

Sixty-four per cent of all adult Canadians were able to recall a memorable ad, commercial or advertiser. Answers were grouped by product category, by brand name and, when there were a sufficient number of responses, by specific ads or advertising campaigns.

Beer advertising is the largest single category of remembered commercials followed by advertising for packaged food, other packaged goods and non-alcoholic beverages. An aggregate total of between seven and eight per cent of Canadians mentioned advertising in each of these product categories.

138

**MOST MEMORABLE AD**  
- By Product Category -

	<u>% of Adult Canadians</u>
None/don't know	36.4%
Alcoholic beverages (beer 7.8%)	8.0
Packaged foods (cereals, cheese, eggs, sliced meats, condiments and spreads, desserts, confectionery, snack foods)	7.6
Other packaged goods (non-food) (detergents, cleaners, paper products, disposable diapers, pet foods, garbage bags, other household products)	7.4
Non-alcoholic beverages (soft drinks, coffee, tea, milk, orange juice, other beverages)	7.3
Stores (drug, grocery, furniture/appliance, department, discount, hardware, home improvement)	5.3
Automotive (cars 3.7%)	4.7
Fast food restaurants	4.1
Personal care products (feminine hygiene 1.4%)	2.7
Home entertainment	2.5
Public service	1.7
Children's toys	1.6
Insulation	1.0
Clothing	0.9
Telecommunications	0.8
Airlines/travel	0.8
Media (ads for radio and television stations, newspapers, movies)	0.7
Small household appliances	0.6
Financial services/products	0.4
Health/fitness/diet centres	0.2
Other	5.0

Coca Cola and Pepsi Cola are in a dead heat as the most often mentioned advertisers. Coca Cola recall tends to be associated with the computer animated Max Headroom character while Pepsi commercials are most identified with personalities such as Tina Turner, Michael J. Fox and Lionel Ritchie.

McDonald's, Molson's and Sony Trinitron are also near the top of the list in terms of the popularity or memorability of their advertising.

The most memorable single ad campaign, however, is the generic "Cheese Please" series of commercials featuring Scott and Joey in English; François and Rémy in French. These ads follow the venerable tradition of using children as product presenters, a technique which still has considerable potency if the children are seen as natural and engaging.

Other outstanding "singles" include Sony Trinitrons' "Stages of Life" commercial, the Fiberglas Pink Insulation "Pool" commercial, Foster's Beer with Paul Hogan, the California Raisin Advisory Board's "Dancing Raisins" commercials and Gainers Meats with Vern and Ernest.

Vern must be one of Canada's busiest commercial characters because in addition to Gainers Meats, Vern is also mentioned in connection with GM/Chevy Olds advertising in Western Canada.

Milk, another generic product, is also high on the list but this represents advertising from more than one source. Recall of favourite milk ads includes the theme line "Give the job to milk" as well as regional campaigns by local dairy associations.

### MOST MEMORABLE AD

- By Brand Name or Reference to a Specific Commercial -

	<u>% of Adult Canadians</u>
Coca Cola	2.1
Pepsi Cola	2.1
"Cheese Please"/Scott and Joey/François and Rémy	1.9
*Milk/dairy association	1.8
McDonalds	1.7
Molson's	1.7
Sony Trinitron/Stages of Life	1.6
Labatt's	1.1
Fiberglas Pink Insulation/Pool/Pink Flamingos	1.0
GM/Chevy/Olds	0.9
Fosters/Paul Hogan	0.9
California Raisins	0.9
Gainers Meats/Vern	0.8
Tide	0.8
Canadian Tire	0.8
Kibbles and Bits Dog Food	0.7
Bell Canada	0.7
Harvey's	0.7
Other (individual products/brand names mentioned by less than 0.7% of respondents)	41.4
None/don't know	36.4

\*Note: Includes both national and regional milk campaigns

Within the beer group, Molson's is the most often mentioned advertiser, followed by Labatt's and then Fosters, a Carling O'Keefe brand. Kokanee and Laurentide are regional brands which stand out in their respective areas of Canada.

140

Setting aside the obvious appeal of children, the main creative themes which characterize Canadians' favourite advertising are humour (ie., Fiberglas and Gainers Meats), special effects (Coke's Max Headroom, Sony Trinitron, California Raisins) and distinctive personalities (Paul Hogan and the still remembered Tina Turner).

### **6.3 Influence of the Consumer Media on the Purchase of Business Products and Services**

This section identifies Canadians who influence the purchase of business products and services and then determines the extent to which they find the consumer media helpful in introducing them to these products or services.

One-third of all full-time workers (32%) and 15 per cent of part-time workers influence company decisions on the purchase of new office equipment, communications systems or business services. This represents 17 per cent of adult Canadians overall.

Demographically, the target group for business product and service advertising is skewed toward 25 to 49 year olds, better educated and more affluent Canadians and those in the professional, managerial or administrative occupational positions. Still, one in five lower level white collar workers and one in four semi-skilled blue collar workers also say that they are in a position to influence their company's purchase decisions.

While there is a difference in the level of influence between men and women per se, there is no difference between working men and working women.

Decision makers are only marginally more prevalent among anglophone than francophone adults (18% versus 16% respectively) but are somewhat less represented among third language Canadians (13%).

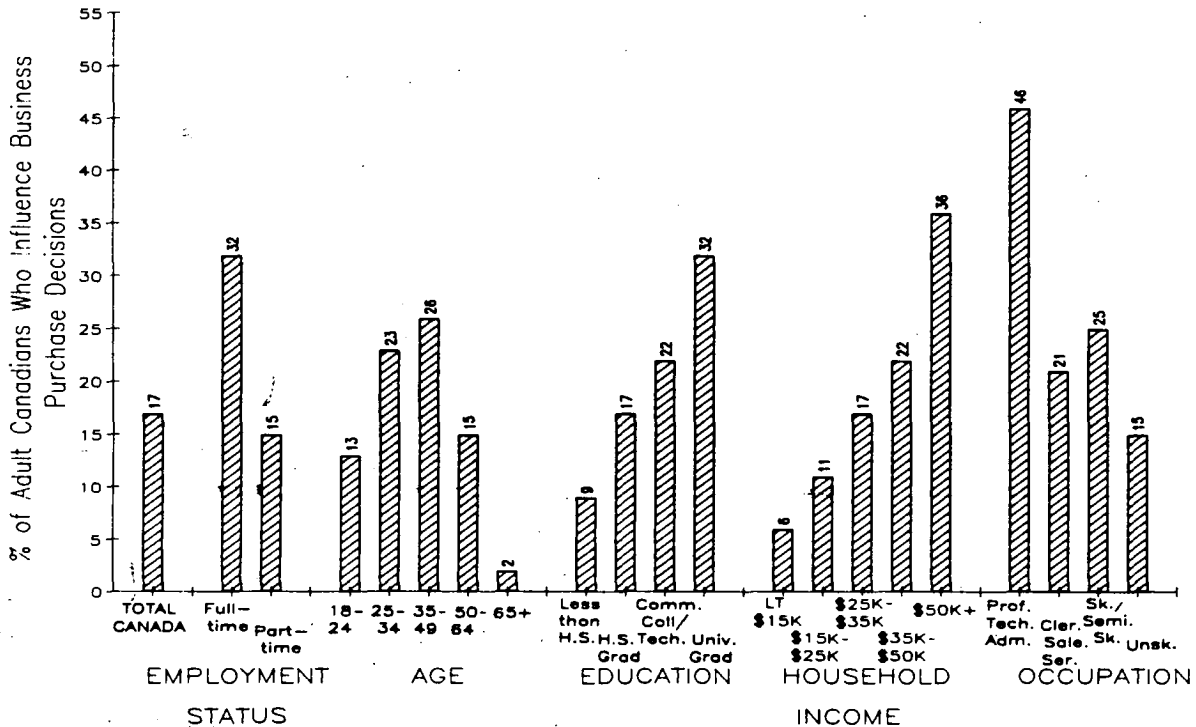
Regionally, the highest per capita concentration of self-declared business decision makers is in Alberta (24%). Otherwise, decision makers as a percentage of regional population, are fairly evenly distributed across Canada and among communities both large and small.

Consumer magazines reach the broadest audience of decision makers and are even slightly ahead of industry or trade magazines in terms of being a helpful source of business product or service information.

Among Canadians who influence company purchase decisions, 62 per cent say that consumer magazines are very or somewhat helpful in introducing them to business products or services. More than 50 per cent also use industry or trade magazines (59%), daily newspapers (56%) and financial magazines or newspapers (53%) for information about business products or services.

**CANADIANS WHO INFLUENCE COMPANY PURCHASE DECISIONS FOR OFFICE EQUIPMENT, COMMUNICATION SYSTEMS OR BUSINESS SERVICES OF ANY KIND**

By Total Canada, Employment Status, Age, Education,



If the print media in all its forms are most helpful, the electronic media - television and radio - are less so. Among decision makers, only 39 per cent identify television and 35 per cent mention radio as useful sources of business related advertising.

Decision makers in major urban markets - particularly in Toronto - are least likely to rely on television or radio for business product or service information. At the same time, they are most likely to use the business press. Dependence on television and radio increases in the less densely populated areas of Canada while reliance on financial magazines and newspapers decreases. Still, in all regions of the country - with the exception of Quebec - the print media are the leading sources of commercial business information.

142

**INFLUENCE OF THE MEDIA ON THE PURCHASE  
BUSINESS PRODUCTS OR SERVICES**

- % of Canadians Involved In Company Purchase Decisions  
Who Say That Each Medium Is Very Helpful, Somewhat Helpful,  
Not Too Helpful or Not Helpful At All In Introducing Them  
To Business Products or Services -

	<u>Very Helpful</u>	<u>Some- what Helpful</u>	<u>TOTAL HELPFUL</u>	<u>Not Too Helpful</u>	<u>Not At All Helpful</u>	<u>TOTAL NOT HELPFUL</u>	<u>DK/NA</u>
Consumer magazines	28	34	62	11	23	34	3
Industry/ trade magazines	36	23	59	12	25	37	4
Daily newspapers	17	39	56	16	26	42	1
Business/ financial magazines or newspapers	22	31	53	12	30	42	4
Television	11	28	39	21	39	60	1
Radio	8	27	35	24	40	64	2

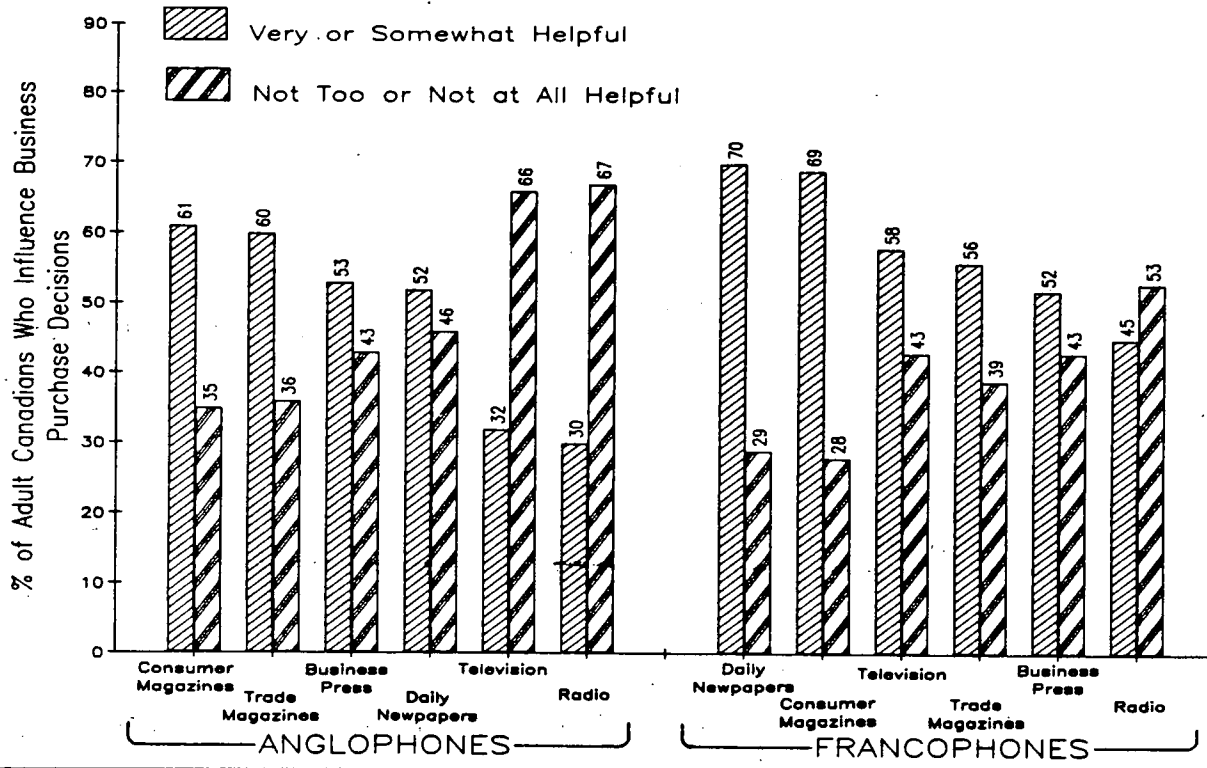
As in many other areas of this study, francophones respond somewhat differently to the media on this issue than anglophones. Daily newspapers and consumer magazines are equally useful sources of business product information among francophone decision makers and are at the top of the list, followed by television and then trade magazines. Anglophones, on the other hand, favour consumer and trade magazines followed by the business press and daily newspapers.

143



# INFLUENCE OF THE MEDIA ON THE PURCHASE OF BUSINESS PRODUCTS OR SERVICES

By Language Spoken at Home



## 6.4 Banning Advertising for Specific Products or Services

Canadians were asked to express their attitudes toward banning advertising for any product or service and then, on an unaided basis, to identify which products or services should be prohibited from advertising on each of the four media outlets.

They were then shown a list of 18 separate product and service categories ranging from cigarettes to lotteries and were asked to respond on an aided basis to the question of prohibiting specific types of advertising on each medium.

Half of all Canadian adults (49%) believe that certain types of products or services should be prevented from advertising on one or more of the four media. Television is the main focus of people's concerns with 44 per cent of Canadians saying that specific products or services should not be shown on television. Only about one in four would ban some advertisers from newspapers (27%), magazines (26%) or radio (23%).

144

The proponents of selected censorship of television advertising are distributed throughout the population but are more likely to be women (51%) than men (36%) and anglophones (48%) than francophones (34%). Fewer young people, aged 18 to 24, think that certain products or services should be prohibited from advertising on television (34%) than Canadians aged 25 or older (between 43 and 49%). Unlike other questions relating to media censorship, however, there is not much difference of opinion among other demographic groups and heavy television viewers are no more nor less supportive of restricting certain types of television advertising than the public in general.

Women are also more inclined than men to ban certain advertising in magazines (30% of women; 24% of men) but the two genders share similar views toward newspaper and radio advertising.

In addition to television advertising, anglophones are also much more concerned than francophones about radio advertising and to a lesser extent, about magazine ads. Anglophone sensitivities may be related to their more open acknowledgement that advertising has an influence on their purchase decisions while francophones tend to reject this notion. It may also speak to a certain prudery in English Canada which is not present in French Canada. This second theory is supported by francophones' level of tolerance for specific kinds of advertising, such as advertising for feminine hygiene products, which anglophones do not share.

**ARE THERE ANY TYPES OF PRODUCTS OR SERVICES WHICH SHOULD BE PROHIBITED FROM ADVERTISING ON EACH OF THE FOUR MEDIA?**

- By Total Canada and Language Spoken at Home -

	<u>All Canadians</u>	<u>Anglophones</u>	<u>Francophones</u>
<b>Television</b>			
Yes	44%	48%	34%
No	51	48	61
DK/NA	5	4	5
<b>Newspapers</b>			
Yes	27	27	27
No	66	67	65
DK/NA	7	6	8
<b>Magazines</b>			
Yes	27	29	21
No	66	65	68
DK/NA	8	6	11
<b>Radio</b>			
Yes	23	26	14
No	70	68	77
DK/NA	7	6	10
<b>NET ALL MEDIA</b>			
Yes	49	51	43
No	51	49	57
DK/NA	--	--	--

142

Although half of Canadians identify specific products or services which should not be advertised, the highest level of unaided response for banning the advertising of any one product category is 21 per cent. This category is feminine hygiene products.

Canadians are most concerned about the advertising of feminine hygiene products on television. Cigarette and tobacco advertising, on the other hand, is associated with all four media as is liquor advertising. Those who oppose beer advertising tend to focus on television.

The cultural gap between English and French speaking Canadians is starkly revealed in their attitudes toward what type of advertising should not be allowed. Feminine hygiene advertising is almost exclusively a problem for English speaking Canadians and, therefore, for the English language media. Advertising aimed at children, on the other hand, is mostly opposed by francophones.

Anglophones are also more likely to mention cigarette and liquor advertising as targets for media censorship while francophones are more concerned about beer advertising.

**TYPES OF PRODUCTS OR SERVICES WHICH SHOULD BE PROHIBITED FROM ADVERTISING**  
(Unaided Responses)  
- % of all Canadians -

	On Television	In Newspapers	In Magazines	On Radio	NET ALL MEDIA		
					Total Canada (4001)	Anglo- phones (2869)	Franco- phones ( 950)
Feminine hygiene products	20%	7%	7%	7%	21%	28%	2%
Cigarettes/tobacco	11	11	12	9	15	16	11
Liquor/alcohol	10	8	9	8	13	14	6
Beer	9	5	5	5	10	9	13
Wine	4	3	3	3	4	5	4
Other health/beauty products	2	2	2	1	3	3	7
Advertising aimed at children	3	1	1	*	3	1	9
Sex (in general)	1	1	1	*	2	1	2
Escort services	*	1	*	*	1	2	1
Sex aids	1	1	1	*	1	1	1
Pornography/nudity	1	1	1	*	1	1	2
Strippers/prostitution	*	1	*	*	1	1	2
Other	7	4	3	2	7	6	10
None/don't know	56	73	73	77	51	49	57

\* Less than 0.5%

146

When Canadians are aided with a list of products and services which might be prohibited from advertising, the number who identify one or more product categories rises to 70 per cent. Opinion is particularly polarized around the advertising of cigarettes or tobacco, feminine hygiene products, liquor, beer and wine.

Feminine hygiene is the only contentious product category for which there is no attitudinal benchmark from the 1969 Senate Report on Mass Media. Despite Canadians' current concerns over cigarette, liquor, beer and wine advertising, over the past 17 years the levels of negative public opinion have dropped significantly. In 1969, a majority of Canadians would ban cigarette and liquor advertising. Today, a majority would not prohibit the advertising of any one product category. This is, no doubt, a reflection of the increasingly restrictive advertising parameters which have already been put in place since 1969.

**TYPES OF PRODUCTS OR SERVICES WHICH SHOULD BE PROHIBITED FROM ADVERTISING:**

**(Aided Responses)**

**- % of all Canadians -**

	<u>On</u>	<u>In</u>	<u>In</u>	<u>On</u>	<u>NET ALL</u>	<u>1969 Senate</u>
	<u>Television</u>	<u>Newspapers</u>	<u>Magazines</u>	<u>Radio</u>	<u>MEDIA</u>	<u>Report on</u>
						<u>Mass Media</u>
Cigarettes/tobacco	41%	34%	35%	35%	44%	60%
Feminine hygiene	37	19	19	24	38	NA
Liquor or spirits	31	24	24	25	33	55
Beer	30	22	22	23	31	39
Wine	20	15	15	16	21	35
Hemorrhoid preparations	13	8	8	9	14	NA
Children's games and toys	12	6	6	7	13	
Undergarments	12	7	7	7	13	
Laxatives	10	5	5	6	11	
Professional services (doctor's, lawyers, etc)	8	5	5	7	9	
Candies/snack foods	7	5	5	5	8	
Lotteries	6	4	4	5	7	
Headache/cold remedies	6	4	4	4	6	
Fast food restaurants	4	2	2	2	5	
Laundry/cleaning	3	2	2	2	4	
Soft drinks	3	2	2	2	4	
Breakfast foods	2	1	1	1	3	
Sporting goods	1	1	1	1	2	
None/don't know	33	49	50	46	55	

NA = Not Asked

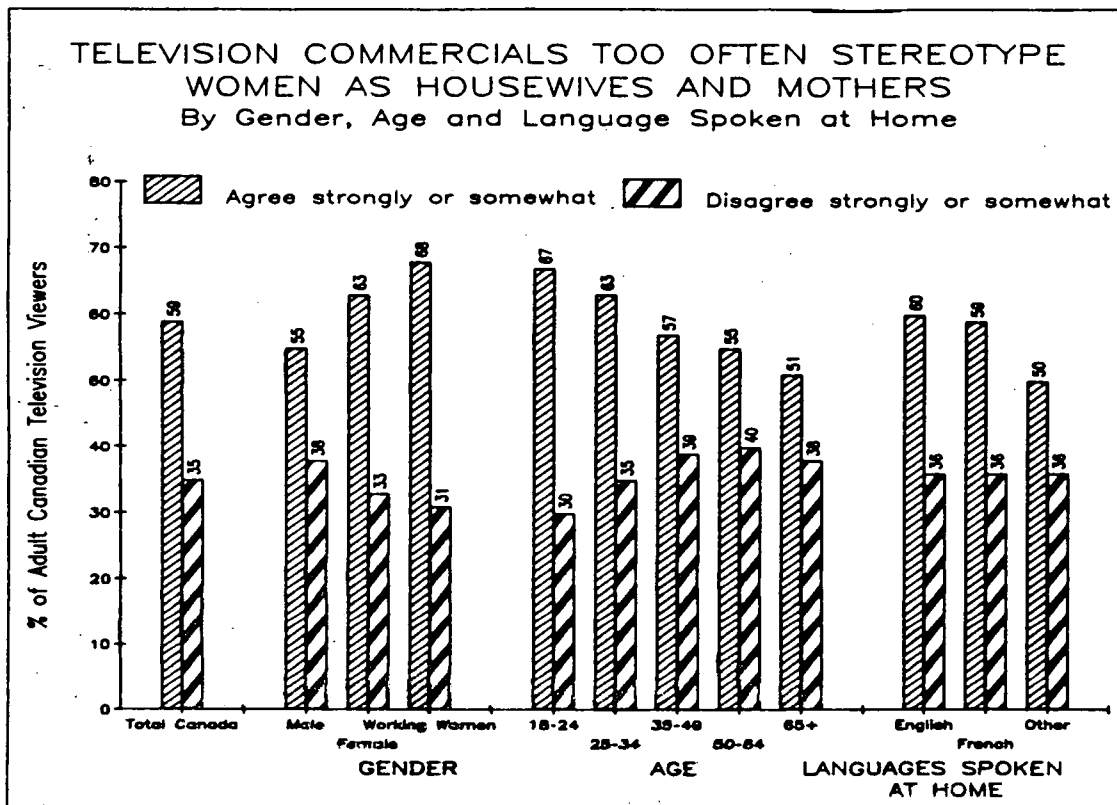
147

## 6.5 - Issues Related to Television Commercials

### Sex Role Stereotyping

Increasing participation of women in the Canadian workforce over the past two decades and related changes in how women are perceived in society have had a direct affect on attitudes toward the portrayal of women in television commercials. Today, almost six in ten adult television viewers (59%) agree strongly (30%) or somewhat (29%) that "television commercials too often stereotype women as housewives and mothers." Only 35 per cent disagree and a very small number (5%) have no opinion one way or the other.

Young people (67%) and working women (68%) are most likely to support the view that television commercials too often stereotype women but the majority of male adults, housewives and television viewers in all age groups also agree.



Attitudes toward the sex role stereotyping of women are widely held, not only among all demographic groups but also among anglophones and francophones (60% and 59% respectively agree) and, to a somewhat less extent, among third language Canadians (50% agree).

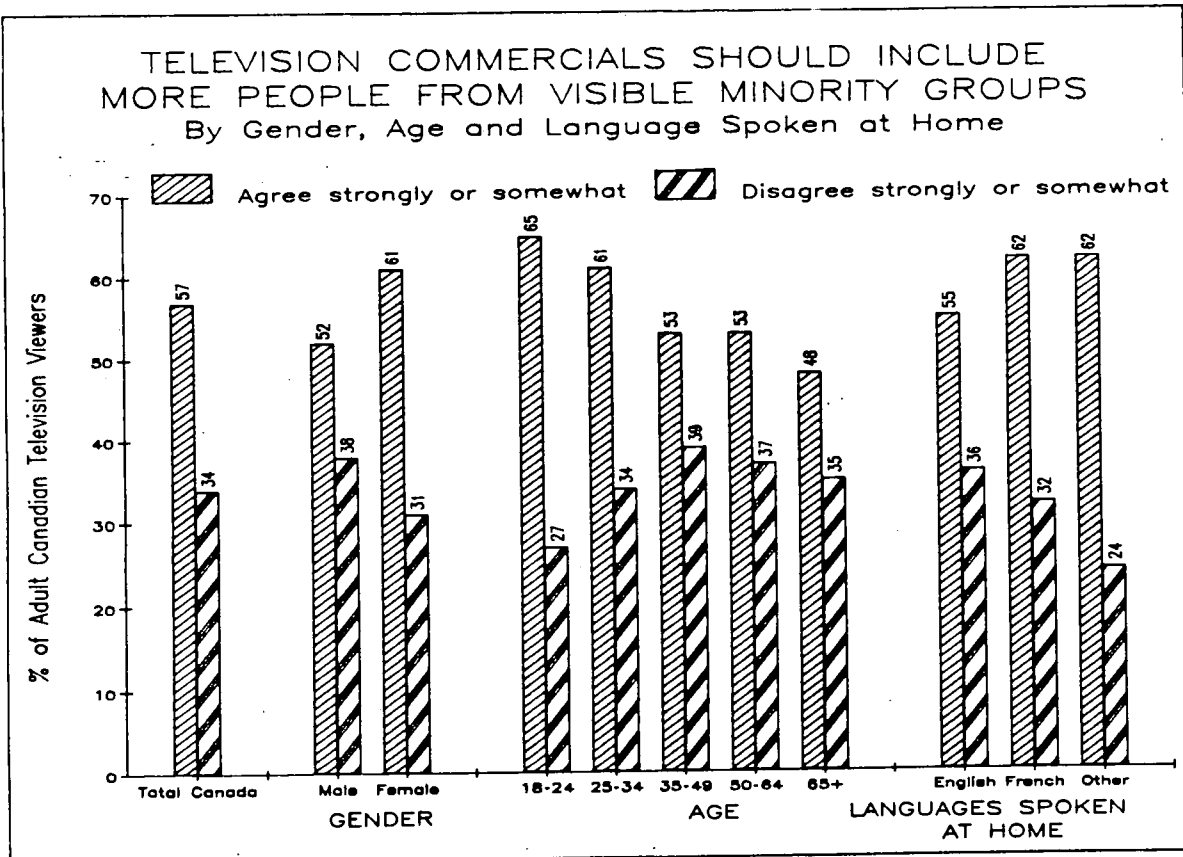
Agreement is equally spread across all regions of the country and among heavy, medium and light television viewers.

## Visible Minority Groups

The majority (57%) of adult television viewers also agrees either strongly (21%) or somewhat (36%) that "television commercials should include more people from visible minority groups." Only one-third (34%) disagree and nine per cent have no opinion.

While a majority or plurality of viewers in each demographic, linguistic or regional subsegment are in favour of increasing the representation of visible minorities in television advertising, the level of support is uneven. Young people and women - both working women and housewives - are more likely to agree than older television viewers or men. Francophones and third language Canadians indicate somewhat higher levels of support (62% agree) than anglophones (55% agree).

Regionally, the level of agreement is highest in the province of Quebec (64%), particularly in Montreal (70%) and is lowest in Alberta (49%). Although Ontario as a whole reflects national opinion, Torontonians are surprisingly reluctant to support increasing the number of visible minority groups shown on television commercials. Almost as many Toronto television viewers disagree (44%) as agree (46%). Since Toronto is the only centre in Canada with a television station dedicated exclusively to multilingual programming, the need for increased representation of visible minority groups may be felt less keenly here than elsewhere.



## Commercial Clutter and Value of Television Advertising

Almost all television viewers agree (89%) that "there are too many commercials on television" but also that "having commercials on TV is a fair price to pay for being able to watch a program" (78%).

Although approximately nine in ten Canadians in all demographic, language and regional subgroups agree that there is too much commercial clutter on television, francophones are more likely to agree strongly (73%) than either anglophones (64%) or third language Canadians (56%). Similarly, television viewers in Quebec and British Columbia are more likely to agree strongly (73% and 74% respectively) than Canadians in other regions of the country.

Torontonians, once again, express a somewhat unique response. While 86 per cent overall agree that there are too many television commercials, only 49 per cent - the lowest percentage in the country - agree strongly.

For some years, the Roper Organization in the United States has been tracking the American public's attitudes toward the value of commercial television. While a substantial majority agree that "having commercials on TV is a fair price to pay for being able to watch a program," support for commercial advertising declined modestly between 1978 and 1980 and has remained at the new, somewhat lower level, throughout the 1980's.

In Canada, Environics' Media Study found that Canadian public opinion on this issue is similar to the 1978 results in the U.S. The Media Study will continue to track Canadians' support for commercial television advertising in the future.

### EVERYTHING CONSIDERED, DO YOU AGREE OR DISAGREE THAT HAVING A COMMERCIAL ON TV IS A FAIR PRICE TO PAY FOR BEING ABLE TO WATCH A PROGRAM?

	Environics' Media Study % of Canadian Television Viewers	U.S. Roper Data			
		'78	'80	'82	'84
Agree	78%	78%	72%	74%	74%
Disagree	14	19	24	21	22
Neither, depends (volunteered)	7	N/A	N/A	N/A	N/A
DK/NA	1	3	4	5	4

Francophones are the only subgroup expressing a lower level of agreement with this question than other Canadians (68% agree; 20% disagree). This results in a somewhat lower level of support in the province of Quebec, particularly among Quebecers who live outside of Montreal (67% agree; 20% disagree).

150

## **7.0 CANADIAN CULTURE AND THE MEDIA**

Several issues pertaining to cultural nationalism are examined in the individual media sections of this report. These include Canadians' attitudes toward the foreign ownership of Canada's media outlets, the influence of American media on our way of life, and the level of Canadian content on television and radio and in daily newspapers and magazines.

Canadians are divided in their opinions toward government protection of the media industry from foreign ownership. They are similarly divided over whether or not there should be fewer restrictions on American or other foreign programming on Canadian television stations. Television is the only medium which the majority of users identify as "too American" in its influence and as having too little content which "reflects a Canadian point of view."

In this section we find that most Canadians believe a separate cultural identity is a worthwhile objective, and that the media are important vehicles for the expression of this identity.

### **7.1 Canada As A Separate Cultural Identity From The United States**

When Canadians are asked whether this country should be doing more, less or about the same as now to develop a separate cultural identity from Americans, the largest number - 50 per cent - say we should be doing more. Only five per cent say we should be doing less and over one-third (37%) would maintain current efforts to distinguish ourselves from Americans. Eight per cent have no opinion one way or the other.

Attitudes toward the development of a separate cultural identity are consistent across all demographic groups and regions of the country including Quebec.

### **7.2 Responsibility Of The Media**

Canadian media, particularly public broadcasting, have always been expected to play a social role in this country, a role which includes building a sense of nationalism by connecting the various disparate regions through a common communications system and preserving or extending Canadian culture at both the national and local levels.

Canadians agree with these objectives. The vast majority say that all media outlets are responsible for building a stronger Canadian identity but also that the onus rests more heavily with some than with others.



Public broadcasters like the CBC bear the greatest responsibility. The CBC and Radio-Canada, as Canada's only publicly-owned national networks, are seen as the vehicles with the reach and mandate to devote funds to programming which defines and reaffirms Canada's cultural identity on a broad scale.

Daily newspapers follow closely behind the CBC. As an important part of Canadians' daily lives and the major source of local community news, newspapers play a leading role in building a stronger Canadian identity at the grass roots level.

Canadians also have high expectations for other media outlets as well. Over 80 per cent say that Canadian book and magazine publishers, private broadcasters like CTV and Canadian radio stations, are also key instruments for reinforcing Canada's cultural identity.

Even though cable companies fall to the bottom of this list - perhaps because the majority of programming people view on cable originates elsewhere - still, over three-quarters of Canadians expect cable companies to shoulder some of the responsibility.

**PERCEIVED LEVEL OF RESPONSIBILITY FOR TAKING A  
LEADING ROLE IN BUILDING A STRONGER CANADIAN IDENTITY**

	VERY RESPONSIBLE			VERY OR SOMEWHAT RESPONSIBLE		
	Total	Anglo- phone	Franco- phone	Total	Anglo- phone	Franco- phone
Public broadcasters like CBC/Radio-Canada	56%	54%	65%	87%	87%	90%
Canadian daily newspaper publishers	50	48	58	84	84	88
Canadian book and magazine publishers	45	43	50	83	83	84
Private broadcasters like CTV	43	40	50	82	81	84
Commercial or private Canadian radio stations	40	37	49	81	80	84
Canadian cable companies	39	37	46	76	75	78

In each and every instance, the intensity of feeling is measurably stronger among francophones than anglophones. More than other Canadians, francophones believe that our communications networks must be used to enhance their self image and reflect the values and cultural expressions of French-Canadian society.

152

## 8.0 TELEVISION - ANCILLARY SERVICES

### 8.1 Overview

This section touches on the penetration and selected usage behaviour of cable television, Pay TV and video cassette recorders (VCR's) based on responses to Environics' Media Study.

The majority of Canadian households (69%) are connected to cable television. This is a substantial increase from the 20 per cent of households which, according to the Senate Committee Report on Mass Media, were hooked up to cable in 1969.

Among cable connected households, 64 per cent are equipped with a cable converter which allows viewers to receive extra channels transmitted by the cable company and to purchase Pay TV should they wish to do so. Cable converter households represent 44 per cent of Canadian households overall.

Twenty-two per cent of households equipped with a cable converter subscribe to Pay Television. Pay TV, therefore, currently reaches at least ten per cent of all Canadian households, a number which has edged up only marginally over the past year.

Over four in ten households (42%) own or hold a long term lease on a video cassette recorder and an additional 21 percent rented a VCR for home use during the past year.

#### PENETRATION OF TELEVISION SETS AND ANCILLARY SERVICES

(Source: Environics' Media Study)

	<u>% of Canadian Households</u>
With one or more working television sets	99%
Connected to a cable television system	69
With either a free standing or built-in cable converter (64% of cable connected households)	44
Subscribe to Pay TV (22% of cable converter households)	10*
Own or lease a VCR	42
Have rented a VCR for home use in past year	21

\*Note: The question on Pay TV was asked only of respondents with cable converters and does not include the small number of households which receive Pay TV without a cable converter.

## 8.2 Cable Television

### 8.2.1 Regional Penetration

The penetration of cable television in Canada has grown on a market by market basis and at the discretion of the CRTC. Premier Cable in British Columbia was Canada's first cable company followed by Roger's and Canadian Cable Systems in Southern Ontario. In 1969, the Senate Committee Study on Mass Media reported that 46 per cent of all television households in British Columbia and 27 per cent of all television households in Ontario were hooked up to cable. Today, British Columbia still leads other parts of Canada with a penetration level of 80 per cent.

Cable television, which in 1969 was almost non-existent in the Maritimes, is now in 46 per cent of all television households. This is still the lowest penetration level in Canada, however.

Vancouver and Toronto are more highly developed cable markets than Montreal where penetration may be constricted by the limited availability of French language cable services. Cable television does reach communities of all sizes, however, and is only underrepresented in rural areas with populations below 5,000.

**PENETRATION OF CABLE TELEVISION**  
- % of all Canadian Households With Television -  
(Source: Environics' Media Study)

	<u>Environics'</u> <u>Media Study</u>	<u>1969 Senate</u> <u>Committee Report</u>
Total Canada	69%	20%
By Region:		
Atlantic Provinces	46	*
Quebec	64	18
Montreal	64	NA
Rest of Quebec	64	NA
Ontario	74	18
Toronto	85	NA
Rest of Ontario	69	NA
Manitoba/Saskatchewan	54	7
Alberta	74	9
British Columbia	80	46
Vancouver	91	NA

**By Community Size:**

1 million +	77	NA
100,000 - 1 million	80	NA
5,000 - 100,000	73	NA
Less than 5,000	41	NA

\* Less than 0.5 per cent

NA Not available

Heavy, medium and light viewers are equally likely to be in cable connected households. This suggests that the penetration of cable television is more a question of geography and access than degree of interest or amount of time spent with television.

### 8.2.2 Use of Non-Licensed Cable Channels

Of the wide array of services available to cable subscribers, three were specifically addressed in this study: local or community public service programs, the parliamentary channel and FM radio programming through cable.

These three services are not universally available in all cable connected jurisdictions but, where provided, must be part of the basic cable service.

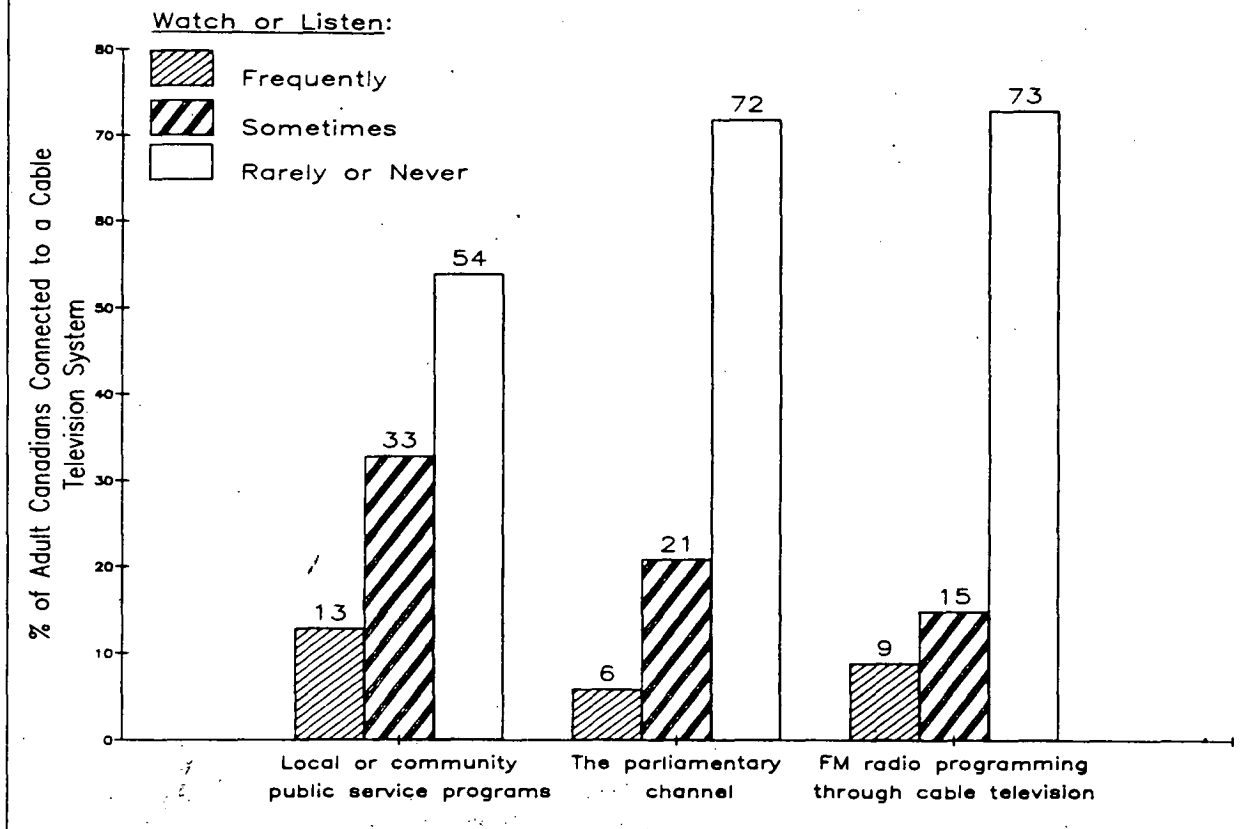
Community service programming is the most broadly accessed of the three specialty cable channels with 46 per cent of all basic cable subscribers saying that they watch these programs frequently or sometimes. This type of programming is most important for viewers in rural communities (55%), particularly in the Atlantic provinces (51%) and Manitoba/Saskatchewan (59%). It is least often watched in major urban centres, particularly Montreal (35%) and Toronto (38%).

Twenty-seven per cent of all cable subscribers watch the Parliamentary channel on a regular or occasional basis. The incidence of viewing is somewhat higher in Toronto (33%) than elsewhere and is lowest in Alberta (15%).

One in four cable subscribers (24%) also listen to FM radio programming through their cable system. Young adults between the ages of 18 and 34 are particularly likely to use the FM radio service on cable, as are Canadians in rural communities (30%) and subscribers living in Western Canada or in Quebec, outside of Montreal (between 30 and 34%).

15

## USE OF SPECIALTY CABLE SERVICES



### 8.3 Cable Converters

In some parts of Canada, extra channels are available through the local cable company. These channels are accessed via a cable converter which may either be a separate unit or built into the television set. At the present time, converters are most prevalent in Ontario, particularly in Toronto. Eighty-three per cent of all cable connected households in Ontario - 90 per cent in Toronto - have cable converters.

The incidence of cable converters is also fairly high in Montreal and Vancouver but at 73 and 74 per cent respectively, both cities still have a way to go to match the Toronto market.

Cable converters are least likely to be present in cable connected households in the Prairies.

As with basic cable, cable converters are equally present in the households of heavy, medium and light television viewers.

156

**PENETRATION OF CABLE CONVERTERS**  
**- % of all Canadian Households With Cable -**  
 (Source: Environics' Media Study)

Households hooked up to cable	100%
<u>Cable Connected Households With Cable Converters</u>	
Total Canada	64%
Atlantic Provinces	51
Quebec	60
Montreal	73
Rest of Quebec	49
Ontario	83
Toronto	90
Rest of Ontario	79
Manitoba/Saskatchewan	22
Alberta	39
British Columbia	60
Vancouver	74

#### 8.4 Pay TV

Most households must have a cable converter to subscribe to - and therefore receive - Pay Television. Pay TV channels bring viewers a range of live sports broadcasts, movies, entertainment specials, rock videos and multi-lingual programming and include the following licensed services in English Canada: The Sports Network (TSN), First Choice/Super Channel, Much Music, Tele Latino, Chinavision, and Super Ecran plus several services from the United States, including the Cable News Network (CNN), the Arts and Entertainment Network, Headline News Network, Financial News Network and the Nashville Network. French Canada has access to the English language services listed as well as to a limited number of French language channels: Super Ecran, Musique Plus and some cable-oriented services such as Télé des Jeunes for Videotron subscribers.

Among households which have cable converters, the penetration of Pay TV is surprisingly consistent across the country and ranges between 20 and 30 per cent. The exception is Montreal where only 12 per cent of cable converter households subscribe to Pay TV.

157

**PENETRATION OF PAY TV**  
 - % of all Households With a Cable Converter -  
 (Source: Environics' Media Study)

Households with cable converters	100%
<u>Cable Converter Households With Pay TV</u>	
Total Canada	22%
Atlantic Provinces	24
Quebec	19
Montreal	12
Rest of Quebec	27
Ontario	22
Toronto	22
Rest of Ontario	23
Manitoba/Saskatchewan	23
Alberta	31
British Columbia	21
Vancouver	19

**8.5 Video Cassette Recorders**

Video cassette recorders are in 42 per cent of all television households. Ownership is skewed toward the Baby Boom generation. Fifty-three per cent of all 25 to 49 year olds own or hold a long term lease on a VCR. Video cassette recorders are most often found in affluent households (66%) but are no more likely to be owned by university graduates than by people with only high school education.

Regionally, Alberta, has the highest penetration level of VCR's (49%) and British Columbia the lowest (32%).

158

**PENETRATION OF VIDEO CASSETTE RECORDERS**  
**- % of Canadian Households With Television -**  
**(Source: Environics' Media Study)**

Total Canada	42%
Atlantic provinces	42
Quebec	43
Montreal	41
Rest of Quebec	45
Ontario	43
Toronto	40
Rest of Ontario	45
Manitoba/Saskatchewan	42
Alberta	49
British Columbia	32
Vancouver	40

Medium television viewers are more likely than heavy viewers to own a VCR (47 versus 38%). This is probably the result of a number of factors: the lower income levels of heavy viewers overall and a desire among less frequent television viewers to maximize their viewing time by pre-recording favourite programs which may then be replayed at a more convenient time.



## **9.0 TELEVISION – NEW PROPOSALS**

The recently published Caplan-Sauvageau Report on Canadian Broadcasting Policy (September, 1986) put forward a number of recommendations which included reaffirming the need for a CBC which is at least partially funded through commercial advertising. The Caplan-Sauvageau Report also outlined proposals for a new, non-commercial national network and an all-news and public affairs channel, both available to cable subscribers as part of their basic cable service.

In this section, we examine Canadians' responses to these and other proposals which would extend the range of services currently offered by Canadian cable companies.

### **9.1 Funding the CBC**

CBC television receives approximately 80 per cent of its revenues from the federal government – and, therefore, from taxpayers – and about 20 per cent from the sale of commercial time on its television networks. CBC radio, on the other hand, is almost exclusively financed through public funds.

Most Canadians support the current system whereby CBC radio and television are financed by Canadian taxpayers and also whereby CBC television may generate additional revenue through commercial advertising.

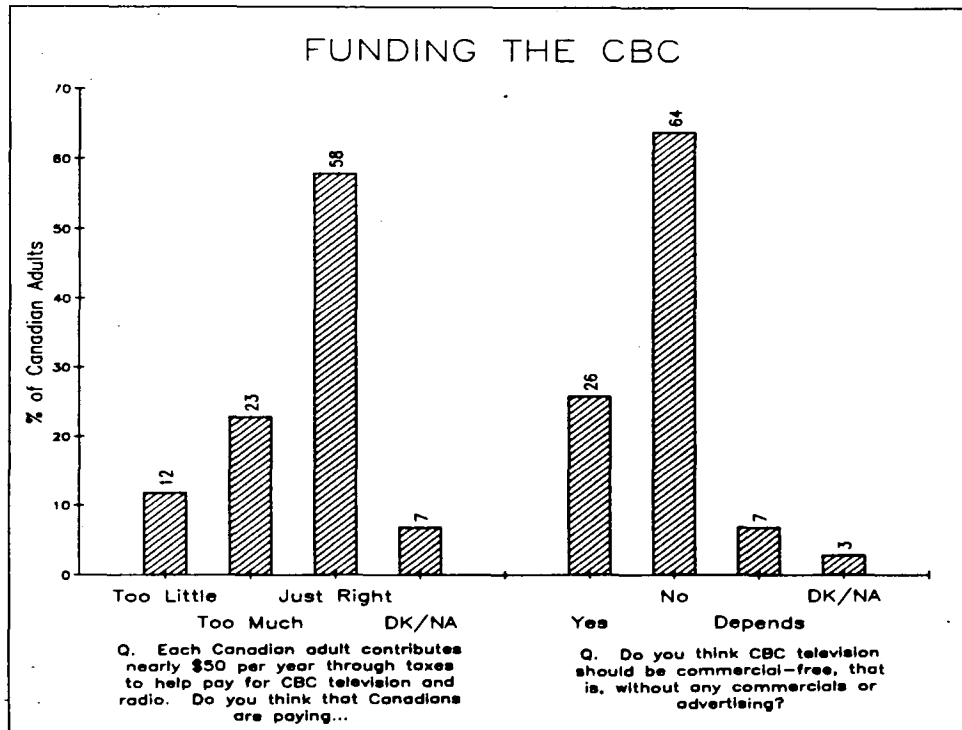
#### **9.1.1 Public Contributions**

When presented with the observation that every Canadian adult contributes nearly \$50 each year to help pay for CBC television and radio, or Radio-Canada, 70 per cent of Canadians respond favourably. Most say that the amount is about right (58%) while a few say that the taxpayer is paying too little (12%). Only one in four (23%) feel that Canadians are paying too much to finance the Corporation.

Support for increasing individual taxpayer's contributions to the CBC/Radio-Canada is highest among more affluent and better educated Canadians as well as among CBC radio listeners. The views of CBC television viewers, on the other hand, are no different from those of the public in general.

Regionally, Ontarians are least likely to say that taxpayers pay too much (17%) while Quebec residents are most likely to feel that the cost is too high (31%).

Although CBC in English and Radio-Canada in French are often working toward many of the same objectives; the cultural environments in English and French Canada, and, therefore, the expectations of the two television audiences are very different. Francophones are more resistant to spending public funds on the CBC than anglophones. Thirty-one per cent of francophones say that \$50 a year is too much to spend on Radio-Canada compared with only 21 per cent of anglophones who feel this way about the CBC. Conversely, 14 per cent of anglophones would spend more compared with only six per cent of francophones.



### 9.1.2 Commercial-Free CBC Television

Only one in four Canadians (26%) say that CBC television should be commercial-free, that is, without any commercials or advertising. Two-thirds (64%) are opposed to this idea. Clearly, most people recognize that CBC television must be in a position to raise revenues exclusive of public funding.

While the majority view in all parts of Canada and among all demographic groups is in support of allowing CBC television to carry commercial messages, francophones are somewhat more in favour of a commercial-free CBC (32%) than anglophones (24%).

### 9.2 Two New Cable Television Channels

TV Canada, a new non-commercial national network primarily devoted to Canadian programming, and a Canadian all-news and public affairs channel were among the recommendations in the Caplan-Sauvageau Report. Both would be accessed through cable television.

161

## 9.2.1 TV Canada

### Program Content

From a list of five options, cable subscribers were asked to select up to three types of programming which they would most like to see on a new commercial-free public channel. The largest number chose National Film Board documentaries (47%) or programs for children and young people (41%), followed by the best of foreign public television (33%), popular Canadian programs from the past (28%) and Canadian cultural programming, such as serious drama, classical music or ballet (24%).

National Film Board documentaries are a popular choice among all Canadians while programs for young people are particularly appealing to parents of pre-schoolers (69%) and parents of children aged 6 to 12 (63%) as well as to the 25 to 34 year old age group (58%) and anglophones (45%).

Francophones, on the other hand, are more interested than others in the best of foreign public television (43%) and also in repeats of popular Canadian programs from the past (33%). Third language Canadians express an above average interest in seeing Canadian cultural programming.

### TV CANADA - PROGRAM PREFERENCES - Up To Three Choices -

	% of Cable Subscribers			
	Total Canada	Anglophones	Francophones	Third Language Canadians
National Film Board documentaries	47%	48%	48%	33%
Programs for children and young people	41	45	33	30
The best of foreign public TV (American, British, French, etc.)	33	29	43	35
Popular Canadian television programs from the past	28	27	33	21
Canadian cultural programming (serious drama, classical music, ballet, opera)	24	24	24	32
None	12	13	11	12
DK/NA	6	7	4	10

### Degree of Interest

Almost seven in ten cable subscribers would be very (28%) or somewhat interested (40%) in receiving the commercial-free TV Canada channel. Interest is highest among the 25 to 34 age group (76%), francophones (74%) and regionally, among Quebecers (74%) and residents of Manitoba/Saskatchewan (75%).

### Subscription Fees

Among cable subscribers who express an interest in receiving the new commercial-free public channel, almost eight in ten (78%) would be willing to pay an extra charge above their current monthly basic cable rate. A somewhat higher proportion of anglophones and third language Canadians are willing to pay extra for this new service (80% and 81% respectively) than francophones (69%).

#### EXTRA AMOUNT WILLING TO PAY ABOVE MONTHLY BASIC CABLE RATE TO RECEIVE TV CANADA

% of cable subscribers who are very or  
somewhat interested in receiving TV Canada

	<u>Total Canada</u>	<u>Anglophones</u>	<u>Francophones</u>	<u>Third Language Canadians</u>
\$0.25	11%	10%	14%	12%
\$1.00	23	23	21	26
\$1.50	6	6	4	9
\$2.00	15	16	13	14
\$2.50	3	3	1	4
\$3.00	11	12	9	9
More than \$3.00	9	10	7	7
None	18	16	28	12
DK/NA	4	4	3	7

### 9.2.2 Canadian All-News and Public Affairs Channel

#### Degree of Interest

The next question in this series was designed to establish cable subscribers' level of interest in a Canadian all-news and public affairs channel. The previous question on price sensitivity toward the TV Canada channel however, with the range of projected additional costs reaching above \$3.00 per month, may have dampened consumers' enthusiasm for the all-news channel. That this indeed was the case is evident by the findings of a separate but parallel Environics' survey, conducted immediately following the Media Study among a representative sample of 2,000 adult Canadians. The methodology employed in both surveys was identical but the Media Study included a price tolerance question while the other survey did not.

With the bias introduced by asking cable subscribers how much they would be willing to pay, only 39 per cent indicate that they would be very or somewhat interested in receiving the all-news channel. Without this bias, 54 per cent of Canadians express an interest in the all-news and public affairs channel.

Although the Caplan-Sauvageau Report suggests that the all-news channel should, at the present time, be launched in English Canada only, it is worth noting that francophones are as interested as anglophones in receiving the new channel.

The level of interest is somewhat higher among men than women and among 25 to 34 year olds.

#### Funding

When interested cable subscribers are asked about funding the all-news network, their preference is for funds to come from advertising revenues with an extra monthly charge of \$0.25 (58%) rather than a higher monthly charge in exchange for no advertising (24%).

Francophones like anglophones, also favour commercial advertising plus a small monthly charge but a considerable number - 25 per cent versus 11 per cent of anglophones - are resistant to both funding options.

#### PREFERRED SOURCE OF FUNDS TO PAY FOR THE CANADIAN ALL-NEWS CHANNEL

% of cable subscribers who are very or somewhat interested in receiving the all-news channel


	<u>Total Canada</u>	<u>Anglophones</u>	<u>Francophones</u>
Commercial advertising plus an extra monthly charge of \$0.25	58%	62%	46%
No advertising but a higher monthly charge	24	24	25
Neither	15	11	25
DK/NA	3	3	4

While there is considerable interest in both new cable services - the commercial-free public network and the all-news and public affairs channel - cable subscribers are wary of substantial increases in their monthly basic cable rate to receive these new services. Those who express the greatest tolerance for increases in cable fees are also those Canadians - more affluent and better educated cable subscribers - who are in the best position to afford them.


### 9.23 Other Proposed Cable Services

It was probably unrealistic to ask cable subscribers in this survey to also respond to the idea of incorporating Pay TV - excluding the movie channel - into the basic cable service and also to determine subscribers' interest in receiving movies on a pay-per-view basis.

The "finding" in this survey that only small numbers of cable subscribers would pay a higher monthly basic cable rate to receive Pay TV and specialty channels, excluding the movie channel; or would be willing to pay between \$3 and \$5 for televised movies on a pay-per-view basis, is less an indication of subscribers' lack of interest than it is a demonstration of what could happen if subscribers are overloaded with too many options - and too much extra expense - at the same time. If cable subscribers were offered Pay TV or pay-per-view movies on an individual basis, and without prior knowledge of the proposed TV Canada and all-news channels, one suspects that interest levels would be higher than the respective 25 per cent and 18 per cent recorded in this survey.

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