
Broadcasting Issues and Canadian Public Opinion

An Ipsos-Reid Survey for The Friends of Canadian Broadcasting

August 2002

Contents and Highlights

The following presents a summary of the key findings from an Ipsos-Reid poll conducted between August 6-11, 2002, among a proportionately representative, random sample of 1,100 adult Canadians. The national results can be considered accurate to within +/-3.0%, 95% of the time. The confidence limits for regional, demographic or other subgroup results vary depending on the number of cases in each subgroup. All tracking data referenced is from previous polls undertaken over the last 10 years (by a different supplier) for the Friends of Canadian Broadcasting.

Some of the key findings presented in this summary include:

Canadian culture and identity (page 3)

- Canadians are very proud of their culture and identity. They overwhelmingly believe that it is something that we should be promoting. They also see a role for government in doing this, especially in the context of maintaining and building our culture and identity distinct from the US.
- Canadians' beliefs that government has an important role to play in maintaining culture and identity appear to be grounded more in pride than in fear. Over 80% believe that Canadians currently have at least a moderate sense of their culture and identity, including four-in-ten who believe that this is strong or very strong.
- However, there is increasing concern about our ability to control our own domestic affairs against pressures from other countries, specifically the United States.

Canadian content (page 5)

- The vast majority of Canadians believe that Canadian content and programming are important overall and in terms of their impact on helping to maintain and build Canadian culture and identity.

CBC and culture/identity (page 6)

- The vast majority of Canadians believe that the CBC is important in helping to maintain and build Canadian culture and identity, and as a symbol of culture and identity.

CBC and its mandate (page 7)

- The CBC receives generally positive reviews from Canadians in meeting its mandate of providing radio and television services incorporating a wide range of programming that informs, enlightens and entertains. This compares favourably with the results from the 1995 survey.

CBC and funding (page 8)

- Canadians are more of a mind to increase the CBC's funding than to reduce it. Four times as many Canadians would advise their MP to vote for an increase rather than decrease in funding for the CBC from current levels. This is a sharp reversal in opinions compared to the 1996 poll when only 20% of Canadians said they would recommend an increase in funding.

CBC and the competition (page 10)

- Compared to other television and radio sources that they use, Canadians ascribe a higher level of personal value to what they watch and listen to on the CBC. However, these value assessments have declined from those reported in the results of a similar 1995 survey.

Media concentration (page 11)

- Canadians are cautiously confident in the performance of the media in presenting news and information that is objective and balanced. While few Canadians believe that this is always the case, a very small proportion believe that the media are never objective and balanced.
- Canadians believe that the federal government should do something about media concentration (only 9% said the government should do nothing). Each of the three options presented for action receive support including asking the CRTC to act, holding a public inquiry and strengthening the CBC to provide a counter-balance.

Canadian Culture and Identity

- Canadians are very proud of their culture and identity. They overwhelmingly believe that it is something we should be promoting. They also see a role for government in doing this, especially in the context of maintaining and building our culture and identity distinct from the US.

Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements...(Rotate)...?	Total agree	Strongly agree	Somewhat agree
	%	%	%
I am proud of Canadian culture and identity	94	70	24
We should be promoting our Canadian culture and identity more; it's something to be proud of	92	74	20
It is important that the Canadian government work to maintain and build a culture and identity distinct from the US	89	66	23

- Further analysis reveals that Canadians from all regions and all political stripes express pride in their culture and identity, believe that we should be promoting it, and see a role for government in this regard.

Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements...(Rotate)...?	I am proud of Canadian culture and identity	We should be promoting our Canadian culture and identity more; it's something to be proud of	It is important that the Canadian government work to maintain and build a culture and identity distinct from the US
	% agree	% agree	% agree
Currently support...			
Liberal	97	98	93
PC	95	93	85
NDP	95	98	94
Alliance	90	89	76
BQ	83	92	91
Would support as 2 nd choice...			
Liberal	97	98	90
PC	93	94	85
NDP	93	95	91
Alliance	96	94	89
BQ	91	96	87

- Interestingly, Canadians' beliefs that government has an important role to play in maintaining culture and identity appear to be grounded more in pride than in fear. Over 80% believe that Canadians currently have at least a moderate sense of their culture and identity, including four-in-ten who believe that this is strong or very strong. This represents an improvement from results in a similar survey conducted in 1993.

Do you think that currently Canadians as a whole have a very strong, strong, moderate, weak or very weak sense of Canadian identity and culture?	'02 %	'93 %
Very strong/strong	39	29
Moderate	43	39
Weak/very weak	16	32
Don't know/no opinion	1	0

- Furthermore, a larger proportion believe that our culture and identity is stronger than weaker vis a vis the US than five years ago, while twice as many Canadians think we will be better off rather than worse off in terms of our culture and identity in five years' time.

As you may know, there has been an ongoing discussion about the impact that the US has on Canada. One area is culture and identity. Overall, compared to 5 years ago would you say that Canadian culture and identity is much stronger, somewhat stronger, about the same, somewhat weaker or much weaker in terms of being distinct from the US?	%
Stronger	43
About the same	30
Weaker	26
Don't know/no opinion	1

- However, the balance shifts to a larger proportion thinking we will be worse off rather than better off in five years time with respect to our ability to control our own domestic affairs against pressures from other countries, specifically the United States. Indeed, this represents an increase in concern in this area from results in the 1996 survey where 28% thought that our ability to control our domestic affairs would be better, 42% the same and 29% worse.

And thinking about the next five years, do you feel that Canada will be much better off, somewhat better off, about the same, somewhat worse off or much worse off in terms of...(Rotate)...?	Better	Same	Worse
	%	%	%
The level of tolerance or acceptance that Canadians show for different types of people	45	40	15
Its economic prospects	42	34	23
Its culture and identity	39	42	18
Our ability to control our own domestic affairs against pressures from other countries, specifically the United States	22	37	39

Canadian Content

- The vast majority of Canadians believe that Canadian content and programming are important overall and in terms of their impact on helping to maintain and build Canadian culture and identity.

On a scale of 1 meaning not at all important to 7 meaning very important, overall how important...(Rotate)...?	% rate high (5-7)
Is it that Canadian radio and television have Canadian content and programming	79
Is Canadian content and programming on television and radio in helping to maintain and build Canadian culture and identity	74

- Consequently, six-in-ten Canadians believe that there should be a required, minimum level of Canadian programming on Canadian television. This is up from 50% who said this in the 1995 survey. Furthermore, almost as many believe that the current regulations requiring one hour of Canadian programming in prime time is too little. This is up from the 1995 survey as well.

There has been some discussion about the amount of Canadian programming on television. Do you personally think that there should be a specified, minimum amount of Canadian programming on television?	'02 %	'95 %
Yes	61	50
No	38	45
Don't know/no opinion	1	5

Currently, the government's television regulations have the effect of ensuring that an average of at least one hour of Canadian programming is available on Canadian television channels in prime time, that is between 7 pm and 11 pm each day. Do you personally think that one hour of Canadian programming in prime time is...?	'02 %	'95 %
Too little	57	47
About right	38	44
Too much	4	5
Don't know/no opinion	1	4

- Canadians perceive news and current affairs shows to provide the highest value as types of Canadian programming, followed by sports and drama series. Reality shows rank far below the other types. Consequently, it is not surprising to find that when asked, 'This fall there will be five Canadian drama series on TV down from 12 that were on TV three years ago... these Canadian drama series have been replaced with other types of Canadian programming, like reality shows...do you think that this is a good thing or a bad thing in terms of the direction of Canadian programming for the future?', almost twice as many Canadians say this is a bad thing (61%) rather than a good thing (34%).

How much value do you think each of the following types of Canadian programming has...Please provide a rating from 1 very low to 7 very high? (Rotate)	% rate high (5-7)
News	93
Current affairs shows like W5, Fifth Estate, Venture, Marketplace	88
Sports	70
Drama series like Da Vinci's Inquest, Due South, Traders, Anne of Green Gables	60
Reality shows like Pop Stars, No Boundaries	27

CBC and Culture/Identity

- The vast majority of Canadians believe that the CBC is important in helping to maintain and build Canadian culture and identity, and as a symbol of culture and identity.

On a scale of 1 meaning not at all important to 7 meaning very important, overall how important do you think the CBC is...(Rotate)...?	% rate important (5-7)
For maintaining and building Canadian identity and culture	81
In terms of being a symbol of Canadian identity and culture	82

- A full 89% also agree (58% strongly, 31% somewhat) that “The CBC is one of the things that helps distinguish Canada from the US.”
- Furthermore, the CBC receives the highest ratings among 13 groups/organizations examined in terms of public confidence/trust to protect Canadian culture and identity on television.

I am going to read to you the names of several groups. Please tell me how much confidence or trust you personally have in each group to protect Canadian culture and identity on television using a scale of 1 meaning very low trust and confidence to 7 meaning very high trust and confidence...(Rotate)...	% rate high (5-7)
CBC	76
The CTV network (English only)	68
TVA (French only)	66
Specialty channels like Much Music, TSN, History Channel	61
TQS (French only)	58
The Global TV Network (English only)	58
The CRTC	51
Consumer Groups	48
The federal government	44
Your provincial government	43
Telephone companies	33
Cable television companies	32
Satellite television companies	30

- While both CBC radio and television are seen as contributing to Canadian identity and culture by a significant number of Canadians, CBC television is the focus for a majority. This shows little change from the results in the 1995 survey.

Between CBC Radio and CBC Television, which one do you think makes the biggest contribution to Canadian identity and culture?	'02 %	'95 %
CBC radio	33	26
CBC television	61	64
Both	4	6
Neither	1	1
Don't know/no opinion	2	3

- Also noteworthy is that the vast majority of Canadians continue to see a need for the CRTC and its activities in Canada today. This shows little change from the results in the 1993 survey.

As you may know, the CRTC is an agency that regulates broadcasting and telephone services on behalf of the Canadian government. On balance do you think that there is a great deal of need, some need, not very much need, or no need at all for the CRTC in Canada today?	'02 %	'93 %
Great deal of need	35	31
Some need	48	48
Not very much/no need at all	16	20
Don't know/no opinion	1	1

CBC and its Mandate

- The CBC receives generally positive reviews from Canadians in meeting its mandate of providing radio and television services incorporating a wide range of programming that informs, enlightens and entertains. This compares favourably with the results from the 1995 survey. However, Canadians give relatively lower performance scores (e.g., excellent/very good) to the CBC in meeting its mandate to reflect Canada and its regions while serving the special needs of those regions.

As you may know, as the national broadcaster the mandate of the CBC is to provide radio and television services incorporating a wide range of programming that informs, enlightens, and entertains. Overall, how would you rate the performance of the CBC in fulfilling this mandate to-date...?	'02 %	'95 %	Another part of CBC's mandate is to reflect Canada and its regions to national and regional audiences, while serving the special needs of those regions. How would you rate the performance of...(Rotate)...in fulfilling this mandate to make programs in and about your part of Canada...?	CBC television	CBC radio
Excellent/very good	40	34		29	30
Good	41	44		41	35
Fair	14	14		22	18
Poor/very poor	5	5		7	6
No opinion	-	3		1	11

- Further questioning reveals that Canadians attribute a high level of importance to the issue of CBC's regional presence and mandate. When asked, '(Another part of CBC's mandate is to reflect Canada and its regions to national and regional audiences, while serving the special needs of those regions)...how important is it that programming made in and about your part of the country be produced...please use a scale from 1 not at all important to 7 very important?', a full eight-in-ten (79%) give a higher importance rating (rate 5-7).
- In addition, a full 88% agree (48% strongly, 40% somewhat) with the statement, 'I would like to see the CBC strengthened in my part/region of the country.' Almost as many (83%) agree (51% strongly, 32% somewhat) that 'We should build a new CBC capable of providing high quality Canadian programming with strong regional content throughout Canada.' Among Liberal voters, support for these statements is 94% and 89% respectively.

- Consequently, Canadians are divided, almost equally between opposing and supporting recent changes by the CBC to move some local and regional programming and operations out of some of the country's regions and centralize them in larger urban centres like Montreal, Toronto and Vancouver. However, further analysis reveals that support for the changes is much higher in the three main urban centres (69%) than in the rest of the country (42%).

As you may know, the CBC has moved some local and regional programming and operations out of some of the country's regions and centralized them in larger urban centres like Montreal, Toronto and Vancouver. Overall, do you strongly support, somewhat support, somewhat oppose or strongly oppose the CBC doing this?	Total%	Toronto, Montreal, Vancouver %	Rest of the country %
Strongly support	12	19	8
Somewhat support	39	50	34
Somewhat oppose	29	20	34
Strongly oppose	17	9	21
Don't know/no opinion	3	2	3

CBC and Funding

- Canadians are more of a mind to increase the CBC's funding than to reduce it. Four times as many Canadians would advise their MP to vote for an increase rather than decrease in funding for the CBC from current levels. This is a sharp reversal in opinions compared to the 1996 survey where only 20% of Canadians said they would recommend an increase in funding.

Assume for a moment that your federal Member of Parliament asked for your advice on an upcoming vote in the House of Commons on what to do about CBC funding. Which of the following three options would you advise him or her to vote for... (Rotate)... decrease funding for the CBC from current levels, maintain funding for the CBC at current levels or increase funding for the CBC from current levels?	'02 %	'99 %	'96 %
Decrease funding for the CBC from current levels	9	8	16
Maintain funding for the CBC at current levels	49	51	61
Increase funding for the CBC from current levels	41	38	20
Don't know/no opinion	1	3	3

- Opinions on CBC funding vary to some extent by current federal vote, second choice federal support, and region. For example, current Liberal and NDP supporters are more likely than average to recommend an increase in the CBC's budget.

Assume for a moment that your federal Member of Parliament asked for your advice on an upcoming vote in the House of Commons on what to do about CBC funding. Which of the following three options would you advise him or her to vote for... (Rotate)... decrease funding for the CBC from current levels, maintain funding for the CBC at current levels or increase funding for the CBC from current levels?	Increase	Maintain	Decrease
	%	%	%
Currently support...			
Liberal	50	47	4
PC	42	47	11
NDP	55	36	8
Alliance	27	47	24
BQ	39	50	10
Would support as 2 nd choice...			
Liberal	48	45	6
PC	36	48	15
NDP	54	41	5
Alliance	45	45	10
BQ	35	39	22
BC	47	42	8
Alberta	30	54	15
Saskatchewan/Manitoba	33	58	9
Toronto (Greater Area)	41	49	9
Ontario	44	49	6
Montreal (Greater Area)	46	45	6
Balance Quebec	33	54	12
Atlantic	51	43	6

- In addition to the importance and performance results presented earlier, these funding results are consistent with other opinions uncovered in the survey. Almost all Canadians (94%) agree (69% strongly, 25% somewhat) with the statement 'I want to see the CBC survive and prosper.' In addition eight-in-ten (81%) agree (27% strongly, 52% somewhat) that 'The CBC provides value for taxpayers' money.'

CBC and the Competition

- Compared to other television and radio sources that they use, Canadians ascribe a higher level of personal value to what they watch and listen to on the CBC. However, these value assessments have declined from those reported in the results of a similar 1995 survey.

	'02 % rate high (5-7)	'95 % rate high (5-7)
Compared to other channels you <u>watch</u> on TV, how would you rate the overall <u>value</u> that you feel you get from what you watch on CBC...please provide a rating from 1 very low personal value to 7 very high personal value? (among watch CBC)	64	71
Compared to other stations you <u>listen</u> to on the radio, how would you rate the overall <u>value</u> that you feel you get from what you listen to on CBC radio...Please provide a rating from 1 very low personal value to 7 very high personal value? (among listen to CBC)	62	75

- Furthermore, among English speaking Canadians, the CBC is chosen by almost twice as many respondents over CTV or Global individually as having the most balanced reporting about Canada's political parties. CTV ranks second and Global third. Among French speaking Canadians, CBC and TVA are named by almost equal numbers.

ENGLISH LANGUAGE ASK; Comparing...(Rotate)... CBC, CTV, and Global... which, if any, has the most balanced reporting of news about Canada's federal political parties? (Rotate) And, who has the second most balanced reporting? FRENCH LANGUAGE ASK; Comparing...(Rotate)...SRC, TVA and TQS...	English interviews		French interviews	
	Most %	Second %	Most %	Second %
CBC	46	25	35	19
CTV	25	39	NA	NA
Global	20	24	NA	NA
TVA	NA	NA	32	37
TQS	NA	NA	18	24
All the same/no difference	3	-	7	-
None	1	-	4	-
Don't know/no opinion	5	-	4	-

- Specific comparisons (English interviews only) between the two private broadcasters reveals that CTV is chosen by close to twice as many Canadians over Global on three attributes – stronger on Canadian programming, spends more on Canadian content, and delivers the more trusted news. Global is chosen by close to twice as many Canadians over CTV on one attribute – stronger on American programming.

[ASKED IN ENGLISH INTERVIEWS ONLY] Comparing only...(Rotate)...CTV and Global... which do you think...(Rotate)...?	CTV	Global	Same	None	No opinion
	%	%	%	%	%
Is stronger when it comes to Canadian programming	63	28	3	1	6
Is stronger when it comes to American programming	28	60	3	1	8
Spends more on Canadian content	61	28	2	1	8
Delivers the more trusted news	59	32	4	1	4

Media Concentration

- Canadians are cautiously confident in the performance of the media in presenting news and information that is objective and balanced. While few Canadians believe that this is always the case, a very small proportion believe that the media are never objective and balanced.

As you know, one of the cornerstones in a democracy like Canada is that people have access to <u>balanced and objective</u> information so that they can participate as citizens. Thinking about the reporting of news and information by the media, overall, do you think that the news and information presented...(Rotate)...is always, sometimes or never balanced and objective?	Always	Some	Never	No opinion
	%	%	%	%
In Canadian newspapers	15	77	6	2
On Canadian TV stations	20	77	3	1
On Canadian radio stations	19	74	3	4

- Moreover, twice as many Canadians believe that the news and information presented on Canadian TV and radio stations is more rather than less objective and balanced compared with five years ago. Assessments of Canadian newspapers are more divided.

And would you say that the news and information presented...(Rotate)...is more, the same, or less balanced and objective now compared to 5 years ago?	More	Same	Less	No opinion
	%	%	%	%
In Canadian newspapers	28	44	25	4
On Canadian TV stations	38	42	18	2
On Canadian radio stations	32	47	15	7

- Questioning on related attitudes toward media concentration shows that over three-quarters of Canadians believe that owners of media outlets have gone too far in trying to inject their own personal politics into what their outlets report, while about two-thirds believe that media concentration undermines Canada's democracy and that there is too much media concentration in Canada today. However, two-thirds also believe that Canadian media need to be concentrated to some extent to be competitive. In addition, 73% of Canadians disagree, including 53% who strongly disagree, that federal politicians should be allowed to accept financial support from companies that own media outlets and are regulated by the federal government.

As you may know there has been some discussion about increased concentration in the media. For example [READ FOR ENGLISH INTERVIEWS -- Bell Canada Enterprises now owns the Globe & Mail and the CTV network, while Canwest Global owns many television stations and newspapers including the National Post] [READ FOR FRENCH INTERVIEWS -- Quebecor now owns TVA, Videotron and several daily newspapers] . Given this, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements...(Rotate)...?	% agree
Owners of Canada's media have gone too far in trying to inject their own personal political opinions into what their media outlets say and what they report	78
Media concentration undermines the health of Canada's democracy	68
Canadian media need to be concentrated to be competitive	64
There is too much media concentration in Canada	62
Federal politicians should be allowed to accept financial support from companies that own media outlets and are regulated by the federal government	26

- Given majority concern about media concentration, the vast majority of Canadians believe that the federal government should do something about media concentration (only 9% said the government should do nothing). Each of the three options presented for action receive support including asking the CRTC to act, holding a public inquiry and strengthening the CBC to provide a counter-balance.

What do you think the federal government should do, if anything, to deal with the issue of media concentration. Should they do...(Rotate)...?	%
Ask the CRTC to review and act on the situation	32
Hold a public inquiry	28
Strengthen the CBC to provide a counter-balance	22
Nothing	9
Something else	5
Don't know/no opinion	5

Political Environment

- The Liberal government enjoys a significant lead over any other party in terms of current decided support.

If a federal election were being held today, which federal party would you vote for or lean towards...(Rotate)...?	%	% decided vote
Liberal	34	43
Alliance	13	16
Progressive-Conservative (PC)	12	15
NDP	11	14
Bloc Quebecois	8	10
Other	1	1
None/undecided/no opinion	21	--

- Further questioning shows that the PCs stand to gain the most if first choice vote preferences break down and people shift to their second choice. Interestingly, while over half of current Alliance supporters say that the PCs are their second choice, current PC supporters split their second choice between the Liberals and the Alliance.

(If named a party would vote/lean towards) Which party would be your <u>second</u> choice if a federal election were being held today...(Rotate)...? (OMIT PARTY NAMED IN 1 st CHOICE?)	Overall	1 st choice Liberal	1 st choice PC	1 st choice NDP	1 st choice Alliance	1 st choice Bloc
	%	%	%	%	%	%
Progressive-Conservative (PC)	30	40	--	16	54	19
Liberal	20	--	34	55	19	34
NDP	19	26	16	--	11	11
Alliance	15	18	36	14	--	0
Bloc Quebecois	3	2	2	5	0	--
No second choice	9	9	7	5	12	10
Other	1	0	1	2	1	0
None/undecided/no opinion	3	2	5	3	2	4

Methodology

Telephone interviews were conducted between August 6-11, 2002, among a proportionately representative, random sample of 1,100 adult Canadians. The national results can be considered accurate to within +/-3.0%, 95% of the time. The confidence limits for regional, demographic or other subgroup results vary depending on the number of cases in each subgroup. Questions about the survey methodology can be directed to Mr. Chris Martyn, Senior Vice-President, or Ms. Jennifer Lang, Senior Research Manager.

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