

# National Broadcasting Policy and Perception Survey

Undertaken for

Friends of Canadian Broadcasting

COMPAS Inc.  
Multi-Audience Research  
Ottawa and Toronto  
March 12, 2001

## Background

Friends of Canadian Broadcasting engaged COMPAS to undertake a national, representative survey among 1000 Canadians.<sup>1</sup> A key survey theme relates to public confidence in the mission of the Canadian Radio-television and Telecommunications Commission. Other themes explored in the survey relate to confidence in the broadcasting system and some cable-related issues currently before the Commission. Findings relating to these other themes can be found in previously released COMPAS/Friends reports. The present document focuses on public perceptions of the CRTC. In some instances, the report contains findings from questions that COMPAS has been tracking on behalf of Friends of Canadian Broadcasting for almost a decade.

Perhaps the most striking general finding is evidence of nationally widespread and intense public enthusiasm for the various elements of the CRTC's mission. Respondents were asked to score the value of the diverse components of the mission ranging from protecting consumers to safeguarding Canadian culture and sustaining diversity of communication in the context of political democracy. The specific questions and evidence of public backing are presented in the body of this report.

## Canadians Embrace Passionately Seven Policy Goals of the CRTC

The current and potential national policy goals of the CRTC resonate strongly with the public. From coast to coast, Canadians embrace each of seven objectives that survey respondents were asked to assess:

- The goal of providing consumers with the most value and best prices
- The goal of ensuring there is enough competition in order to protect freedom of speech and democracy
- The goal of enabling Canadians from different regions and languages to know and understand each other better
- To protect Canadian culture and identity at a time of very strong American and global economic forces

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<sup>1</sup> Surveys of this size are deemed accurate to within 3.5 percentage points 19 times out of 20. Fieldwork was carried out by professional interviewers using Computer-Assisted Telephone Interviewing during the period January 27-February 1, 2001.



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- The goal of encouraging more Canadian content in broadcasting
- The goal of ensuring a diversity of channel owners and a diversity of channel choices, and
- To help create an economic environment in which businesses in the sector are financially viable so that they can serve Canadian viewers.

While Canadians truly embrace each of the above listed goals, to the extent that it is worthwhile to gauge the public’s passion for one goal over another, two goals elicit fractionally more intensity—(a) consumer price protection and (b) “the goal of ensuring there is competition in order to protect freedom of speech and democracy.”

Public enthusiasm for these seven CRTC goals is very strong. In the case of the goal of “providing consumers with the most value and best prices,” two-thirds (66%) rate this as a very important goal while one-quarter (24%) rate it as a somewhat important goal.

While consumer price protection ranks at the top, even the bottom ranked goal elicits virtually as widespread backing. The top-ranked goal of consumer price protection is seen as very or somewhat important by 90% of Canadians. The bottom-ranked goal, protecting the economic viability of broadcasting businesses, is not far behind with 82% of Canadians seeing it as very or somewhat important.

*“As you know, the CRTC is an agency that regulates broadcasting and telephone services on behalf of the Canadian government. The following are some possible goals for the CRTC when it makes its decisions. Please tell me how important is each of these goals. [rotate] First of all, would you say...”*

	Very Important	Some what	Not really	Not at all	No opinion
The goal of providing consumers with the most value and best prices is very important, somewhat, not really, or not at all important	66	24	5	2	2
The goal of ensuring there is enough competition in order to protect freedom of speech and democracy	58	29	6	4	3
The goal of enabling Canadians	52	34	8	4	2



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from different regions and languages to know and understand each other better					
To protect Canadian culture and identity at a time of very strong American and global economic forces	51	30	11	5	4
How about the goal of encouraging more Canadian content in broadcasting	41	38	12	6	3
The goal of ensuring a diversity of channel owners and a diversity of channel choices	40	45	8	3	4
To help create an economic environment in which businesses in the sector are financially viable so that they can serve Canadian viewers	40	42	9	5	5

Canadians perceive the CRTC goals as falling into three distinct categories: *Protecting Canadian Identity*, *Ensuring Competition*, and *Financial Motivations*. The preceding classification emerged from an exploratory factor analysis of respondents' importance ratings.<sup>2</sup> The three factors are:

- *Protecting Canadian Identity*; comprised of “to protect Canadian culture and identity at a time of very strong American and global economic forces” (factor loading of .800), “the goal of encouraging more Canadian content in broadcasting” (.790), and “the goal of enabling Canadians from different regions and languages to know and understand each other better” (.675)
- *Ensuring competition*: comprised of “the goal of ensuring a diversity of channel owners and a diversity of channel choices” (.787) and “the goal of ensuring there is enough competition in order to protect freedom of speech and democracy” (.730).

<sup>2</sup> For ease of interpretability, the latent root criteria was relaxed in order to extract this three factor solution.



- *Financial motivations*: comprised of “the goal of providing consumers with the most value and best prices” (.907) and “to help create an economic environment in which businesses in the sector are financially viable so that they can serve Canadian viewers” (.542).

For the sake of simplicity, a mean score was computed for each factor by taking a mathematical average of respondent scores for all the variables contained within a given factor.<sup>3</sup> Under this procedure, each factor “mean” is on the same 4-point scale (“no opinion” is excluded) as the individual questions. The mean score for each factor is presented below.

*Mean Factor Scores on a 4-Point Scale of “Very Important”, “Somewhat Important”, “Not Really Important”, and “Not At All Important”*

	Mean Score
<i>Financial Motivations factor</i>	3.40
<i>Ensuring Competition factor</i>	3.36
<i>Canadian Identity factor</i>	3.28

The mean scores suggest that Canadians place a rather uniform importance on the different categories of CRTC goals.

## Consensus on CRTC’s Fulfilling a Need

A public sensibility about the continuing need for the CRTC remains stable and unabated. As evidenced in the table below, 81% of Canadians feel that there is a great deal of need or some need for the broadcasting regulatory agency while 13% say that there is no or not much need.

*“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?”*

	1993	1995	2001
No need	7	10	5

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<sup>3</sup> Note, this involves treating ordinal scaled questions as interval data



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Not much	13	10	8
Some	48	46	47
Great deal	31	31	34
Un prompted: No opinion	1	4	6

## CBC, Private Broadcasters, CRTC Lead in Public Trust

The Friends of Canadian Broadcasting and COMPAS have been tracking public trust in various broadcasting actors and protagonists for almost a decade. The CBC continues to lead in public trust while the private broadcasters follow in second place. Meanwhile the specialty channels and the federal government appear to have risen in public confidence.

*“ I am going to read 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. You can do this by giving me a rating on a 7 point scale, where 7 means you have a very high level of trust or confidence and 1, the opposite...[rotate]”—Percent Scoring 5-7*

	1993	1995	2001
The CBC	71	70	70
The CTV Network <sup>4</sup> /TVA in French language interviews	61	56	65
Specialty channels like Much Music/TSN or the History Channel (in French: Musique Plus, RDS, ou le Canal Histoire)	47	45	64
The CRTC	56	48	60
The Global TV Network/TQS in French language interviews	NA	NA	55
The federal government	29	34	47
Consumer groups	51	44	44
Your provincial government	32	31	41
Telephone companies	NA	35	37
Cable television companies	38	29	37

<sup>4</sup> Prior to 2001, a combined CTV/Global question was utilised.



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Satellite television companies	NA	18	31
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**Note:** Items in the preceding table are rank-ordered by top three scores (i.e. 5-7 out of 7).

The following are some patterns that appear to be emerging from the tracking data:

- Consistent confidence in the CBC
- A recent rise in confidence in the specialty channels
- An apparent rebound in confidence in the CRTC
- An apparent rise in confidence in provincial governments and especially the federal government
- Moderate confidence in the telephone companies
- Moderate confidence in the cable companies with an apparent rebound following a low point in 1995, and
- A pattern of emerging moderate confidence in satellite television companies that parallels the recent growth of satellite television services.

## Conclusion

COMPAS' national survey for the Friends of Canadian Broadcasting reports intense, national, public enthusiasm for the various elements of the CRTC's mission. By immense margins, Canadians consider important the diverse components of the mission ranging from protecting consumers to safeguarding Canadian culture and sustaining diversity of communication in the context of political democracy.

