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**Canadian Heritage**

# **Summative Evaluation of the TV5 Program**

**Corporate Review Branch  
Evaluation Services Directorate  
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**Canada** 

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# List of Acronyms

APFTQ	Association des producteurs de films et de télévision du Québec (translation : Quebec Film and Television Producers Association)
CIDA	Canadian International Development Agency
CFB	Communauté française de Belgique (translation: French Community of Belgium)
CIRTEF	International Council of French-Speaking Radio and Television
CRTC	Canadian Radio-television and Telecommunications Commission
CTQC	Quebec-Canada Television Consortium
DFAIT	Foreign Affairs and International Trade Canada
FTE	full-time equivalent
ISBO	Islamic States Broadcasting Organization
MATV	Master antenna television systems
OIF	Organisation internationale de La Francophonie
PCH	Department of Canadian Heritage
RMAF	Results-based Management and Accountability Framework
RTBF	Radio-télévision belge de la communauté française
SRC	Société Radio-Canada (French equivalent of the Canadian Broadcasting Corporation)
TFO	Télévision éducative et culturelle de l’Ontario français (translation : French-language public education network in Ontario)
TSR	Télévision suisse romande
TV5 QC	TV5 Québec Canada
TV5-M	TV5 Monde (also known under the official name TV5 Monde S.A.)

## *Explanation of Key Terms:*

- *TV5 network:* the TV5 television product, including the TV5 Québec Canada and TV5 Monde channels
- *TV5 signal:* the broadcast of the TV5 television product
- *TV5 project:* the international audiovisual partnership behind the creation of TV5 QC and TV5-M
- *TV5 Program:* the grants and contributions program, managed by the Department of Canadian Heritage, which is the subject of this report

The acronym “TV5 QC” refers to the Canadian corporation that broadcasts the TV5 network’s programming exclusively within Canada. The acronym “TV5-M” refers to the French corporation that broadcasts the TV5 network’s programming in other regions of the world.

# Summary

## *Introduction*

This summative evaluation examines the TV5 Program of the Department of Canadian Heritage (PCH). The Program has an overall envelope of \$7.2 million per year for the two operators of TV5: TV5 Monde (TV5-M) and TV5 Québec Canada (TV5 QC). To fund Canada's participation in the TV5 international network, the Program provides a named grant of \$4.2 million to TV5-M and a contribution of \$3.0 million to TV5 QC; this includes \$1 million to cover the costs of purchasing broadcast rights for Canadian programs on TV5-M.

## *Evaluation objectives*

The summative evaluation prepared for PCH is intended to:

- comply with Treasury Board requirements for renewal of funding for the TV5 Program in March 2008; and
- inform the Government of Canada of the relevance, performance and impact of the Program, with the aim of improving how it is managed and making Canadian participation in TV5 cost-effective.

The evaluation is being conducted at the same time as a government-wide evaluation of Canada's participation in the Organisation internationale de la Francophonie (OIF), of which TV5 is one of the main operating agencies. The findings of this parallel evaluation, which is led by the Canadian International Development Agency (CIDA), should be ready by spring 2008. The ultimate objective of the process is to make recommendations to the Government of Canada concerning its overall participation in the Francophonie prior to the 2008 Summit in Québec City.

## *Evaluation issues*

The evaluation covers the following issues:

- In terms of *relevance*, it seeks to determine whether federal participation in TV5 is still relevant in the context of the current French-language audiovisual environment, and whether the TV5 Program is still in line with the priorities of the Government of Canada and the strategic objectives of PCH.
- In terms of *success and impact*, it attempts to determine whether the TV5 Program generates positive outcomes and desired results without adverse effects.
- In terms of *cost-effectiveness/alternatives*, it seeks to determine whether the TV5 Program uses the most appropriate and effective methods and the most financially viable approaches to achieve its objectives, and whether the governance and management structure of the two operators promotes achievement of the objectives of Canada's participation in TV5.

### ***Methodology***

The evaluation is based on a series of investigative approaches that combine qualitative and quantitative data gathering. The evaluation team reviewed documents and relevant literature, performed four case studies, interviewed 34 key stakeholders, met with five audiovisual media experts, analyzed statistics and audience ratings, and organized two surveys of viewers of the channels operated by TV5 QC and TV5-M. The data required for the evaluation was collected and analyzed between September 2006 and January 2007. This report is based on research conducted by Groupe-conseil baastel ltée.

***Evaluation questions, main findings and conclusions***

Evaluation Questions	Findings and Conclusions
<b>Relevance of the TV5 Program</b>	
<p>In its current form, is the TV5 Program still compatible with the government’s priorities and the strategic objectives of PCH?</p>	<ul style="list-style-type: none"> <li>• The TV5 Program supports the Government of Canada’s international policy priorities and PCH’s strategic objectives, which are to bring Canadians together and put them in contact with the rest of the world.</li> </ul>
<p>a) Enhance Canada’s influence in the world</p>	<ul style="list-style-type: none"> <li>• TV5-M undoubtedly contributes to Canada’s objectives for an international presence.</li> <li>• Canada’s participation helps TV5 achieve its objectives, while enhancing the country’s influence in the world.</li> </ul>
<p>b) Enable Canadians to enjoy a variety of cultural experiences and share them with each other and the world</p>	<ul style="list-style-type: none"> <li>• TV5 QC is an excellent medium for familiarizing Canadians with Francophone life internationally and nationally, thereby enabling them to enjoy a variety of cultural experiences and share them with each other and the world.</li> </ul>
<p>Is federal participation in the TV5 network relevant in the current audiovisual context?</p>	<ul style="list-style-type: none"> <li>• In the short term, the changes taking shape in TV5’s environment do not affect its relevance or Canadian participation in the network. It would be important to analyze the changes under way and consider measures for ensuring the network’s relevance and survival.</li> </ul>
<b>Success and impact</b>	
<p>Is the TV5 Program producing positive outcomes and desired results for Canadians? Is it meeting the desired performance objectives without adverse effects?</p>	<ul style="list-style-type: none"> <li>• The TV5 Program is producing tangible results in terms of showcasing Canadian content on TV5-M, contributing to the cultural vigour of the international Francophonie, promoting Canadian audiovisual production, and giving Canadian audiences access to the international and Canadian Francophonie via TV5 QC.</li> </ul>
<p>a) Contribution to Canada’s international presence</p>	<ul style="list-style-type: none"> <li>• Canada has gained a larger share of programming on TV5-M since 2004 and currently holds a seemingly strong position, particularly given the Canadian resources invested (5% of TV5-M funding, with Canadian broadcasts accounting for 8.5% of the programming schedule).</li> <li>• The positioning of Canadian programs should be reviewed, since they are not well known among the TV5-M audience.</li> <li>• Setting targets for the various program objectives would make it easier to measure the achievement of desired results.</li> </ul>
<p>b) Contribution to the presence of the international Francophonie (in Canada and around the world)</p>	<ul style="list-style-type: none"> <li>• The TV5 Program contributes to the presence of the international Francophonie through its television cooperation efforts and Canadian programming content on the TV5 QC and TV5-M channels.</li> </ul>

Evaluation Questions	Findings and Conclusions
c) Contribution to the creation and production of Canadian audiovisual products	<ul style="list-style-type: none"> <li>• The TV5 Program contributes to Canadian audiovisual production, particularly since a number of special TV5 QC productions would not have been possible without the special projects envelope provided to the operator.</li> <li>• Special projects could be selected on the basis of better-defined criteria.</li> </ul>
d) Canadian audiences' access to a window on the cultural diversity of the Francophonie	<ul style="list-style-type: none"> <li>• The TV5 network is successfully holding and even consolidating its niche in a highly competitive market, given its viewers' preferences.</li> <li>• TV5 QC enjoys a strong reputation among a loyal and generally adult audience.</li> <li>• TV5 QC's Canadian programming decisions are complex, since they must take into account viewer preferences, producer needs, and strategic expectations of the channel's administrators and managers.</li> <li>• Reaching new markets in a cost-effective manner would be difficult for TV5 QC in Canada. Most TV5 QC viewers do not regard the channel as particularly suited to young audiences. Statistical trends also show that the channel has difficulty penetrating non-Francophone markets in Canada. Nevertheless, new distribution platforms such as the Internet could reach these audiences, especially young people and learners of French, in conjunction with traditional television broadcasting. The next few years will be crucial for evaluating the effectiveness of these solutions.</li> </ul>
<b>Cost-effectiveness / alternatives</b>	
Is the TV5 Program using the most appropriate, efficient and cost-effective ways of reaching its objectives, or should other models be considered?	<ul style="list-style-type: none"> <li>• Changes in the industry, especially technological changes, are major challenges for which TV5 QC is making proper preparations. In the short term, the channel is not threatened.</li> <li>• The prospects for diversifying funding sources in the short term are limited, whether through new partnerships, advertising or increasing private-sector involvement. However, TV5 QC's and TV5-M's efforts at diversification make sense at a time when the partner governments are under pressure to cut spending.</li> <li>• The partner governments will continue to play a leading role in providing both funding and guidance for the two operators.</li> <li>• Management of the Program appears to be effective given market standards and when compared with similar programs.</li> </ul>
Are the governance and management structures of	<ul style="list-style-type: none"> <li>• The governance structure of both operators is functional and the Government of Canada is adequately represented</li> </ul>

Evaluation Questions	Findings and Conclusions
<p>TV5-M and TV5 QC able to promote achievement of the Government of Canada’s objectives in participating in TV5?</p>	<p>within that structure.</p> <ul style="list-style-type: none"> <li>• The Quebec-Canada partnership is considered highly effective because both parties have similar interests in TV5 and invest their own expertise in its development.</li> <li>• Many stakeholders see a potential conflict of interest within the TV5 QC Board of Directors since the Société Radio-Canada and Télé-Québec “wear two hats” on the Board: representatives of each network are required to take part in decisions that could affect their own organization. This perception may arise from a misinterpretation of the way the Board works. It should nonetheless be addressed.</li> <li>• Addressing cooperation issues between TV5 QC, TV5-M and their partners is essential to increasing TV5’s overall effectiveness. The two operators must avoid working independently since they have very similar interests and objectives and play complementary roles in presenting Francophone culture.</li> </ul>

**Recommendation 1** – *The evaluation has demonstrated the relevance of the federal government’s involvement in TV5 to date. However, given the future technological issues and challenges TV5 is likely to face, the federal government should support TV5 QC and TV5-M in their reflections with the aim of repositioning the channel. The government should also closely monitor changes to the situation of TV5 to ensure that its involvement continues to remain relevant in the future.*

**Management Response:**

In return for an investment (\$7.2 million per year), the TV5 Program yields tangible results. It respects and effectively supports Government of Canada priorities and PCH strategic objectives, particularly with regard to Canada’s international presence and the opportunity to provide Canadians with a cross-section of the international Francophonie.

However, the significant changes taking shape in the Canadian television industry and the resulting major challenges warrant a joint approach by all parties. The Canadian Radio-television and Telecommunications Commission (CRTC), PCH and other stakeholders have already begun to study the future of the broadcasting system in Canada and internationally in light of the technological and commercial issues looming on the horizon. For TV5 QC and TV5-M, the expanding array of distribution platforms and new technologies present both challenges and opportunities. The two operators must certainly focus heavily on positioning themselves effectively vis-à-vis their competitors, while continuing to deliver a high-quality product. The mandatory shift to digital and the high cost of producing high-definition programming must be evaluated with regard to viewers’ expectations. The Program should continue to support the approach taken by TV5 QC and TV5-M, specifically by considering what actions should be taken to address the major issues that will arise in the future, including potential CRTC deregulation



with respect to the *Broadcasting Distribution Regulations*; this could have an impact on channel funding that for the most part (over 60%) currently comes from subscription fees.<sup>1</sup>

*Implementation schedule:* Ongoing with specific projects

**Recommendation 2** – *Encourage the efforts of both operators to diversify their sources of revenue, and particularly to reduce their dependence on government assistance.*

The search for new sources of revenue should, however, take into account the inherent market constraints; these may limit the impact of proposed solutions, particularly the use of broadcast advertising. Diversification options should be considered and weighed in light of a cost-benefit analysis. TV5 QC cannot expect to significantly transform its funding structure in the short or medium term by tapping new revenue sources, whether advertising, subtitling, delivering new products via the Internet or finding new partners. However, a more extensive study of the potential for advertising on TV5 QC should be conducted, considering the impact that advertising may have on the audience. Despite the difficulties associated with diversifying funding sources, the Program should encourage TV5 QC to explore all possible ways of diversifying, provided that the quality of the channel is not compromised. If diversification fails to significantly increase TV5 QC revenues, the Program and the channel's managers could consider the possibility of raising subscription fees in Canada when the network's licence comes up for renewal with the CRTC.

**Management Response:** Accepted, action under way

PCH will ask TV5 QC to prepare a report that analyzes other possible sources of revenue, to estimate the cost of implementation versus the desired financial impact, and to make recommendations on what measures would be required to access these new revenue sources. If some of the measures proposed in the report require amendments to TV5 QC's broadcasting licence, this issue may be reviewed by the Canadian Radio-television and Telecommunications Commission when the licence is up for renewal in August 2009.

Both operators have already taken action following the 2001 evaluation. For example, since 2005, TV5 QC has been broadcasting advertising, while TV5-M has been exploring new markets with a view to expanding its audiences through new distribution channels and services. However, TV5 QC's advertising revenues account for only a small portion of its budget, and it is unlikely that they will increase considerably in the coming years. TV5 QC and TV5-M are therefore continuing to explore all possible opportunities for diversifying their revenues, particularly through the utilization of new technologies and an expanded array of platforms.

*Implementation schedule:* TV5 QC's report is to be submitted to Canadian Heritage in August 2007.

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<sup>1</sup> Deregulation could force TV5 Québec Canada to raise its subscription fees to cover the shortfall, higher production costs and broadcasting rights, with the obvious risk of losing a significant share of its current subscribers. The combined impact of the fall in revenues and loss of market share to other providers and platforms could jeopardize the very existence of TV5.

**Recommendation 3** – *Set specific targets for different program objectives.*

As things now stand, it is difficult to evaluate the Program's performance in terms of quantifiable indicators. The Program needs to review the percentage of airtime devoted to Canadian programming on TV5-M and TV5 QC, the number of Canadian programs, the positioning of these broadcasts in the TV5-M programming schedule, the type and variety of the programs broadcast, the number of special projects to be supported, and the percentage of Canadian participation in the TV5-M and TV5 QC budget. The review will enable the Program to set specific and realistic targets for each objective. The Program should be able to set such targets for the short, medium and long term, taking into account the situation in the audiovisual industry.

**Management Response:** Accepted, action under way

The performance reports of both operators already provide some of this information on a yearly basis (potential reception, ratings, number and percentage of Canadian programs on TV5 QC and TV5-M).

At the same time, in response to the evaluation comments, the Program has developed new performance indicators and fine-tuned others in its *Results-based Management and Accountability Framework (RMAF)* and *Risk-based Audit Framework (RBAF)*, which as been reviewed in Fall/Winter 2007-2008.

*Implementation schedule:* An RMAF/RBAF was finalized in March 2008. Financial data and performance statistics from the operators will be collected regularly, and will be made available to the Program on an annual basis.

**Recommendation 4** – *Promote communication and collaboration between TV5 QC and TV5-M.*

TV5-M is a key player in Canada's strategy of participation in the international Francophonie and its strategy of promoting its own television productions. More sustained collaboration between TV5-M and TV5 QC would make it easier to solve challenges, such as the difficulties involved in producing reports given the operators' differing fiscal years. The two operators have much to gain from working together as efficiently as possible to make TV5 even more efficient. The Program could support joint initiatives between the operators focused on broadcast projects or on content-sharing between the various platforms that will be explored further in the coming years. TV5 QC and TV5-M might be encouraged to share strategic information on their performance objectives, the results achieved by their initiatives and best practices in management, possibly through a joint task force. It might be useful for TV5-M and TV5 QC to harmonize their accounting and have their fiscal years coincided; this would facilitate transactions between the two operators, as well as their administration and performance evaluation.

**Management Response:** Accepted, action under way

The Program encourages both operators, regularly and during senior officials' meetings, to explore partnerships aimed at sharing knowledge and expertise among themselves, and working toward achieving common objectives.

The Program will restate in writing to both operators its desire to see them working together on common issues, including production and distribution. The Program will report on arrangements favouring this approach, potentially including funding of special projects.

*Implementation schedule:* Over the next five years and ongoing, depending on the proposed projects

***Recommendation 5*** – *Review the positioning and the type of Canadian programs in the TV5-M schedule.*

Although the percentage of Canadian programs on TV5-M has risen in recent years, which does not mean that these programs are more popular with viewers. In fact, survey results clearly indicate that TV5-M viewers are not very familiar with Canadian programs. It would be advisable to review the positioning and type of these broadcasts in the schedule in the interest of maximizing their visibility. This would involve strengthening the role of the programs committee (which is responsible for coordinating program acquisitions and clearing rights for TV5-M), enabling it to make choices that meet the interests of Canada, the two networks and their audiences. Canadian programs would then have better chances of receiving advantageous time slots, which would promote the visibility of Canadian content internationally.

**Management Response:** Accepted, action pending

The positioning and type of Canadian programs broadcast by TV5-M are of great importance to the Program. In this context and in response to some of the observations made by the Program and the evaluation, PCH will commission a study to conduct an in-depth analysis of the positioning, percentage and type of Canadian programs in TV5-M's programming schedule for a selected period. This information can be used to determine whether the positioning of Canadian programs broadcast by TV5-M is appropriate for each region covered by the network.

The findings of the study will be used to determine the relevance of tangible recommendations to TV5-M. These issues are just as relevant for the other funding partners. Quebec and Switzerland, in cooperation with all the partner countries of TV5-M, are planning to prepare a discussion paper dealing with the scheduling of all partners' programs on TV5-M.

*Implementation schedule:* The study will start in 2007–08 and will be submitted to PCH during the 2008–09 fiscal year.

***Recommendation 6*** – *Examine the relevance and, if applicable, the feasibility of efforts to interest and attract younger audiences.*

TV5 QC's management hopes to attract more young people with its programming, an approach that was suggested in the 2002 summative evaluation of TV5. This is an option worth exploring since it would help expand the network's audience while helping the Government of Canada achieve its objectives of making the Francophonie more widely known by raising awareness of the international and Canadian Francophonie in this segment of the population. This could perhaps serve to counteract the influence of the U.S. networks. Care must be taken to adopt the right strategy, since current TV5 QC viewers are well-informed but appear to have little interest in programming changes to attract young people. Greater use of the Internet would be a useful

way of attracting this audience since increasing numbers of young people are choosing the Internet over more traditional media, including television programs. Young learners of French especially could benefit from such a platform. TV5 QC, in conjunction with the Program, should consider whether it would be useful and possible to adopt innovative methods to attract a youth audience without alienating its traditional and increasingly loyal viewers.

**Management Response:** Accepted

The Department accepts this recommendation. Although it is more directed at the two operators, it calls for the Program to support them in their reflections and efforts to meet this objective. The decision to develop younger audiences is up to the operators' respective management teams and boards of directors. TV5 QC and TV5-M have already taken measures regarding this recommendation, such as adjusting their programming schedule to attract younger viewers and developing their Internet site to provide more interactive content of interest to a younger audience. Furthermore, TV5 QC would like to create a "mentoring" program to encourage a new generation of young producers from Francophone minority communities. The Department will, as far as possible, support projects that fall under this recommendation.

The Program's objective is to ensure that TV5 QC retains 1.2% of Canadian viewers despite growing competition from other broadcasters. The Program's objective for TV5-M is to retain or increase its audience (171 million or more) and that, on average, 7% of its broadcasts be Canadian programs.

From time to time, the Program will inquire about the success of TV5 QC and TV5-M management efforts to attract younger audiences.

**Recommendation 7** – *Prepare a list of criteria to promote transparency in the selection of special projects to be funded.*

The special projects envelope should be used more judiciously. At present, it is difficult to assess its impact accurately, given the excessive diversity and disparity of projects. There is also little transparency in the project selection rules. In collaboration with the TV5 Program, TV5 QC should prepare a list of selection criteria for special projects to be funded. This would enable producers to plan their initiatives more effectively in accordance with Program expectations, thus making the process more systematic and transparent. Impact assessment would also be easier. Central to the choice of selection criteria for special projects should be support for Francophone producers outside Quebec and compliance with Canadian objectives for participation in the Program.

**Management Response:** Accepted, action pending

PCH, in cooperation with TV5 QC, will develop a list of parameters to guide the selection of special projects to be produced by TV5 QC. This list will reflect the specific objectives of the operator and the broader objectives of the Government of Canada regarding TV5. It will also provide for more transparent selection of projects.

*Implementation schedule:* Fall 2007

# 1. Introduction

## 1.1 Evaluation objectives

This evaluation report deals with TV5, an international general-interest television network that broadcasts French-language programs throughout the world to provide a showcase for the entire international Francophonie.

The Government of Canada seeks to promote Canada's involvement and influence within the international cultural Francophonie. Through the TV5 Program of the Department of Canadian Heritage (PCH), the government provides \$7.2 million per year in funding for the operation of the international TV5 network in Canada and other countries.

This summative evaluation is intended to comply with Treasury Board requirements for renewal of funding for the TV5 Program in March 2008, and to inform the Government of Canada about the Program's relevance, performance and impact, with the aim of improving how it is managed and making Canadian participation in TV5 cost-effective.

This report takes into account the main conclusions and recommendations of the previous summative evaluation of the TV5 Program, published in 2002,<sup>2</sup> as well as the 2002–03 internal audit report,<sup>3</sup> to which it is a follow-up. It also sets new benchmarks for undertaking future evaluations. Finally, it provides input for a broader examination of Canada's participation in the Francophonie, which is currently the subject of a separate evaluation performed under the aegis of the Canadian International Development Agency (CIDA). TV5 is one of the main operating agencies of la Francophonie.

## 1.2 Background

From the outset, it is important to note certain prevailing conditions that could influence TV5 managers in making important strategic decisions. These will be examined in greater depth later in this report:

- **Deregulation.** The trend almost everywhere in the world is toward deregulation of the television sector. In Canada, the Canadian Radio-television and Telecommunications Commission (CRTC) is in the process of redefining the rules governing cable and satellite distributors that broadcast the signals of channels such as TV5. The new standards emerging from deregulation could stimulate the appearance of new channels on the market, as has been happening for several years already.
- **New market trends.** Changes in the supply of television products are helping to change viewer habits and, in turn, demand. For example, the growing number of specialty channels is leading viewers to abandon general-interest channels such as TV5 in favour of channels that offer targeted or locally themed programs closer to their own experience.

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<sup>2</sup> Goss Gilroy Inc., *Evaluation of Federal Participation in TV5*, prepared for PCH, February 20, 2002.

<sup>3</sup> PCH (2003), *Audit of Single Recipient Contribution Programs*, Ottawa: Government of Canada, February 26, 2003.

- ***Liberalization and consolidation.*** The growing number of channels is making competition fiercer, thus intensifying the ongoing pressure on broadcasters' costs and profit margins. Further, the major broadcasting and cable groups are continuing to pursue a strategy of acquiring smaller competitors, thus leading to consolidation of the industry. As a result, independent broadcasters such as TV5 must manoeuvre for position in an environment where they do not always carry much weight.
- ***Technological changes.*** Technical advances are supporting the introduction of new services and distribution methods (the Internet, video on demand, TV on cell phone) that attract a growing share of the audience, especially in certain segments such as youth. In Canada, a very recent CRTC study found that the future environment of the Canadian broadcasting system will not be disrupted in the short term.<sup>4</sup> However, with the transition to high definition television (in the wake of decisions by the large American broadcasters) and the beginning of the shift to digital television, deep structural changes are coming that will require significant investments by Canadian broadcasters.

### 1.3 Evaluation issues and questions

Taking into account the background and prevailing conditions, the evaluation covers a series of questions to be found in the matrix appearing in Appendix C. In brief, they are as follows:

- In terms of *relevance*, the evaluation seeks to determine whether federal participation in TV5 is still relevant in the context of the current audiovisual environment, which is constantly changing, and whether the TV5 Program is still compatible with the priorities of the Government of Canada and the strategic objectives of PCH.
- In terms of *success and impact*, the evaluation attempts to determine whether the TV5 Program generates the expected positive spin-offs and desired results without adverse effects.
- In terms of *cost-effectiveness /alternatives*, the evaluation seeks to determine whether the TV5 Program uses the most appropriate and effective methods and the most financially viable approaches to achieve its objectives, and whether the governance and management structure of the two operators promotes achievement of the objectives of Canada's participation in TV5.

Further, the evaluation is intended to be a tool for assessing follow-up on the 2002 evaluation, which issued recommendations mainly about:

- searching for potential sources of additional funding;
- increasing spin-offs from exported programs for Canadian producers;

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<sup>4</sup> Source: CRTC (2006), *The Future Environment Facing the Canadian Broadcasting System: A report prepared pursuant to section 15 of the Broadcasting Act*, Ottawa: December 14, 2006. This study provides benchmarks on advances in broadcasting technologies, their use by Canadians and their effect on the broadcasting system. The report finds that the appearance of new technologies and the increase in distribution platforms will have marginal adverse economic impacts for the moment. The *Broadcasting Act* remains relevant and current, since the changes do not threaten Canadian content in the short term. In medium and long term, the parties consulted are convinced that new technologies will have an economic impact on broadcasters, but they do not agree on its extent. The CRTC plans to review its radio and television regulatory frameworks in light of the consequences of technological advances, especially the shift to digital TV and high-definition broadcasting.

- making Canadian audiences more aware of the federal government's commitment to TV5;
- ensuring that Canada has strong representation within the TV5 structure (newly reorganized at the time) so that it can protect its position; and
- perhaps adopting an approach to attract and retain an audience of young Canadian viewers, who are often attracted by American productions.

The evaluation made it possible to collect valuable information on the challenges and risks facing TV5 decision-makers and, in turn, the managers of the TV5 Program. Although the evaluation matrix does not expressly address these factors, the evaluation team found it relevant to consider them in this report, given their importance.

## 2. Profile of the TV5 Program

### 2.1 History of TV5

In 1984, the international TV5 network was established as the outcome of a partnership between France, the Communauté française de Belgique (CFB) and Switzerland. Canada and Quebec joined in 1986.<sup>5</sup> TV5 now involves six broadcasting partners: France Télévisions,<sup>6</sup> ARTE France, Radio-télévision belge de la Communauté française (RTBF), Télévision suisse romande (TSR), the Société Radio-Canada (SRC), Télé-Québec and the International Council of French-Speaking Radio and Television (CIRTEF).

TV5 is currently the leading French-language television network in the world and the second-largest global television network, behind MTV and ahead of CNN. Over 171 million homes on five continents can receive TV5 by cable or satellite, 24 hours a day, in over 200 countries and territories; this represents 24.5 million viewers a day (cumulative audience). TV5 is also broadcast in 3 million hotel rooms, and its programs are picked up by nine airlines to reach 7.5 million passengers.

TV5 plays a key role within La Francophonie by being one of its main operating agencies. The network offers a wide variety of programs: news, culture, drama, travel, entertainment, documentaries and special reports, sports, interviews and panel discussions. These provide an excellent showcase for Francophone artists and producers seeking to become known nationally and internationally.

Section 5 of the 2005 TV5 Charter describes TV5's overall public service mission as to:

- serve as a window on the entire Francophone world;
- promote cultural diversity;
- reflect its multilateral character;
- foster program exchanges between Francophone countries and international exports of Francophone programs;
- be a forum for cooperation between partner broadcasters and seek to present their programs; and
- foster creative expression in Francophone audiovisual and film products.<sup>7</sup>

The network is managed by two operators: TV5 Monde (TV5-M) located in Paris, which manages the signals for Europe, Africa, Asia, the United States, Latin America and the Middle East; and Montréal-based TV5 Québec Canada (TV5 QC), which manages the TV5 signal for Canada. In 2001–02, TV5's structure and management were overhauled to make the network more competitive. The Department of Canadian Heritage represents the Government of Canada at

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<sup>5</sup> The operator TV5 QC was created in 1986 to broadcast the TV5 signal in Canada. The channel obtained its operating licence from the CRTC in 1988.

<sup>6</sup> The France Télévisions group is composed of the public channels France 2, France 3, France 4, France 5, Réseau France Outre-Mer and the cable-based France Ô channel.

<sup>7</sup> TV5 [project] (2005), *La Charte TV5*, Brussels, September 19, 2005; Web address: [www.doc.diplomatie.fr/BASIS/pacte/webext/multinde/DDD/20050144.pdf](http://www.doc.diplomatie.fr/BASIS/pacte/webext/multinde/DDD/20050144.pdf) (November 2006).



the Conference of Ministers Responsible for TV5, the body in charge of the network's strategic approaches.

The chart in Appendix A shows TV5's governance structure. TV5-M's Board of Directors is composed of:

- representatives of broadcasters from France, as well as the CEO of TV5-M (six seats);
- a representative of the broadcaster from the Communauté française de Belgique (one seat);
- a representative of the broadcaster from Switzerland (one seat);
- representatives of the public broadcasters from Canada and Quebec (one seat). The SRC and Télé-Québec both sit on TV5-M's board but have only one vote. The SRC and Télé-Québec yearly take turns acting as director or observer.

TV5 QC's Board of Directors is composed of:

- the SRC;
- Télé-Québec;

Télévision éducative et culturelle de l'Ontario français

- (TFO), a specialized subsidiary of TVOntario;
- the Quebec Film and Television Producers Association (APFTQ); and
- the Government of Canada (two appointed members), the Government of Quebec (two appointed members) and the CEO of TV5 QC. The CEO of TV5-M can also attend board meetings as an observer.

## 2.2 TV5's programming

TV5's programming targets an audience in Canada and beyond:

- In Canada, TV5 QC aims to reach the Francophone audience in Quebec and the rest of Canada, but also targets all Canadians.
- Outside Canada, TV5-M's programming primarily targets countries of the Francophonie, and more generally a wider audience in the main regions of the world (the TV5 signal covers all five continents).

TV5's programming is intended to be of general interest and multilateral, including programs from partner broadcasters. The broadcast schedules vary from one region to another. Under its operating licence granted by the CRTC, TV5 QC is committed to devoting at least 15% of its programming to the broadcast of Canadian programs during the day and peak viewing hours (6:00 p.m. to 11:00 p.m.). In fall 2005 for example, TV5 QC obtained a 1.3% market share in Francophone Quebec during prime time. On average, Canadian programs made up 8.5% of TV5-M's programming schedule abroad in 2006.<sup>8</sup>

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<sup>8</sup> Source: TV5 QC.

## 2.3 Canadian funding for TV5

The Government of Canada's funding for TV5 amounts to about \$7.2 million per year, in two envelopes:

- ***Envelope for TV5-M.*** The Government of Canada provides TV5-M with a grant of about \$4.2 million; of this amount, Foreign Affairs and International Trade Canada (DFAIT) contributes \$500,000 for TV5 Africa. The Government of Quebec also participates financially in TV5-M, providing \$2.6 million per year. Together these two contributions make up 5% of the total TV5-M budget, which in 2005 amounted to about 90 million euros, or \$138 million.<sup>9</sup> Of this amount, common costs total about \$61 million, covered two thirds by France and the rest equally by Belgium, Switzerland and Canada/Quebec. The remaining \$77 million, called specific costs, are covered almost entirely by France as well as by subscription and advertising revenues. A partnership agreement provides for Canadian financial responsibilities to be shared between the federal government (60%) and the Government of Quebec (40%).
- ***Envelope for TV5 QC.*** The Government of Canada provides TV5 QC with a contribution of about \$3.0 million: \$1.0 million for operations, \$1.0 million for the costs of clearing broadcast rights to Canadian programs on TV5-M, commonly called “export budget,” and a variable envelope for supporting the production of Canadian programs under “special projects.”<sup>10</sup> TV5 QC's total budget amounted to \$12.3 million in 2005–06. The Government of Quebec also contributes to the operator's budget, providing 40% (\$920,000) in 2005–06 against the federal government's 60%.

Since 2004, TV5 QC has been authorized to display up to 12 minutes of advertising per hour of airtime.<sup>11</sup> However, advertising currently accounts for less than 1% of its revenues, the main sources being subscription fees (71% of revenues), and contributions from the governments of Canada (11%) and Quebec (7%).<sup>12</sup> As for TV5-M, advertising covers about 4% of its budget, versus 4% from subscription fees and 92% from contributions by partner governments (France, 76.7%; the CFB, 4.7%; Switzerland, 4.7%; Canada, 2.8%; and Quebec, 1.9%).<sup>13</sup>

Until 2003, federal government funding for TV5-M was provided through the Quebec-Canada Television Consortium (CTQC), the legal entity that preceded TV5 QC. Since 2004 this funding is given directly through a grant to TV5-M. To date, two grant agreements have been signed between TV5-M and PCH. Nevertheless, since 2005 PCH has been receiving on a more regular basis a statement of the channel's activities, a statement of future prospects and strategic planning, a budget estimate, and a statement of measures the channel plans to take to meet certain challenges. All five funding governments (France, the CFB, Switzerland, Canada, Quebec) participate in funding TV5-M via grants.<sup>14</sup>

<sup>9</sup> Canadian dollars at the exchange rate on February 15, 2007.

<sup>10</sup> The special projects envelope varies from year to year, mainly according to the requests submitted by TV5 QC. The total amount came to around \$600,000 in 2005, versus \$300,000 in 2002 and \$989,000 in 2003, according to data from the TV5 Program.

<sup>11</sup> In reality, however, the actual number of on-air advertising minutes is lower.

<sup>12</sup> According to TV5 QC's income statement for the fiscal year ending August 31, 2006.

<sup>13</sup> According to TV5-M's budget filed for the 2005 fiscal year.

<sup>14</sup> Note that partner governments meet annually to discuss topics such as the budget, and that they are committed, subject to available funds, to requesting approval for it if they think the budget complies with the program's objectives and criteria. During these annual

## **2.4 Objectives of Canada's participation in TV5**

As shown in the logic model in Appendix B, Canada's participation in the TV5 Program includes two main objectives:

- to contribute to Canada's international presence by offering Canadian Francophone artists and producers a prime showcase on the international audiovisual market; and
- to offer Canadians a fresh perspective on the international Francophonie by operating the TV5 signal in Canada, with broadcasts made up largely of European programs unavailable on other Canadian French-language channels (such as TFO or Radio-Canada).

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meetings, TV5-M takes the opportunity to present a report of its activities and state its priorities for the coming year, in accordance with the strategic plan previously approved by the ministers responsible for TV5 from the five partner governments.

## 3. Methodological Framework

### 3.1 Evaluation schedule and strategy

The data required for the evaluation was gathered and analyzed between September 2006 and January 2007. As far as possible, the information gathered from different sources was cross-checked so that findings could be based on a sound triangulation of the data. This report is based on research conducted by Groupe-conseil baastel ltée.

### 3.2 Description of lines of investigation

The evaluation is based on the following seven lines of investigation:

- **Document review.** To broaden its knowledge of the file, the evaluation team examined a wide range of documents, most of which were provided by PCH. In particular, the review made it possible to analyze TV5's governance structure, the role of the various stakeholders and partners, the funding provided by the federal government, the expected impact in the short, medium and long term, and the results obtained according to activity reports and financial documents. For a complete list of documents examined, see Appendix D.
- **Literature review.** The team reviewed international audiovisual partnerships and governance models similar to those of TV5. Five examples were analyzed: EuroNews, TeleSUR, ARTE-TV, France 24 and the Islamic States Broadcasting Organization (ISBO). Based strictly on the examination of public documents obtained via the Internet (see Appendix D), this comparative analysis enabled the team to determine some common features and consider the prospects for transferring best practices in management, organization and programming to TV5.
- **Case studies.** To properly determine the overall impact of the TV5 Program on Canadian audiovisual productions and artists, the team analyzed a sample of four projects partially or entirely funded through the Program's special projects envelope. The projects were chosen in close collaboration with the TV5 Program. Telephone or personal interviews were conducted with producers responsible for the projects and with PCH.
- **Interviews with key stakeholders.** Via personal or telephone interviews, the team consulted 34 key stakeholders chosen with PCH's assistance, to integrate their knowledge of the TV5 channel and thereby enrich the analysis. For a list of people consulted, see Appendix E. The questionnaire used for interviews appears in the technical appendices.
- **Interviews with experts.** To deepen its analysis of the relevance, success, impact and efficiency of TV5's management, the team conducted personal or telephone interviews with five Canadian or foreign experts in audiovisual media identified with PCH's assistance, including three university researchers (see Appendix E). The interviews allowed the team to reflect more deeply on the place and positioning of TV5-M and TV5 QC on the Canadian and international television scene, checks certain research

hypotheses, and obtains the opinion of specialists on the evaluation context and issues. The interview questionnaire is included in the technical appendices.

- ***Analysis of statistics and audience ratings.*** The evaluation team compiled and analyzed records of audience ratings measured in Canada and Quebec, as well as various other relevant statistics provided by TV5 QC. The goal was to measure TV5's audience range and impact in different viewer categories. See Appendix F for a summary of the findings of this line of investigation.
- ***Surveys.*** Finally, to directly gather the opinion of TV5 viewers in Canada and elsewhere, the team conducted two surveys targeting the audience of TV5 QC and that of TV5-M. The objective of these surveys was to measure the satisfaction rate and expectations of TV5's clientele — especially in terms of the channel's impact and success — and to measure the extent of Canada's presence in the Francophonie and the world. Participating in the surveys were 350 respondents in Canada (for TV5 QC) and 103 respondents outside Canada (for TV5-M).

### 3.3 Limits of the methodology

The size of TV5 and the complexity of the issues addressed represented significant challenges for the team throughout the evaluation, the main ones being:

- ***Availability of some information.*** Some documents and information were difficult to obtain, particularly TV5 QC's annual reports, produced only for the last two years. This situation can be explained mainly by the channel's restructuring in 2002. Before 2002, the requirements for regularly submitting reports were much more flexible under the grants system. The introduction of the Results-based Management and Accountability Framework (RMAF) in 2002 led to an adjustment in procedures, with the establishment by the TV5 Program of contribution agreements with TV5 QC. This reform permitted an improvement in data gathering on TV5 QC's performance, thus allowing periodic evaluations of that performance — as confirmed by the 2005 RMAF, which recognizes that with this reform the annual reports comply better with the standards described in the contribution agreements and the RMAF.<sup>15</sup> The evaluation team also relied on TV5 QC's cooperation to access data from other document sources; in the end this helped to offset the gaps resulting from missing official reports for the years before 2005.
- ***Matching of financial data.*** The different fiscal year periods made for complex computation of financial results: the fiscal year runs from April 1 to March 31 in the case of PCH, from September 1 to August 31 in the case of TV5 QC and from January 1 to December 31 in the case of TV5-M. The evaluation team had no choice but to work with the data available for each organization. It would be desirable for the data to be harmonized to facilitate the management of funding from the TV5 Program.
- ***Case studies.*** Case studies also presented a challenge in terms of impact evaluation, owing to the lack of clearly defined parameters for evaluating the overall significance of

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<sup>15</sup> For example, the 2005–06 business plan repeats, for previous years, most of the data required by the 2005 RMAF, providing an overview of the channel's financial information and performance indicators, including market shares (compared with competing channels) as well as the diversification of funding sources.

this component particularly in the medium and long term. The limited sample of productions analyzed, the differences between projects funded and the difficulty in projecting certain results obtained into the future (e.g. the number of jobs created via the special projects envelope, or the economic impact for producers from this envelope) do not allow clear conclusions to be drawn about the significance of this financial envelope.

- **Statistics.** The aggregation of certain statistical data prevented detailed analysis of findings. For example, because of the presentation method of audience ratings measured by the firm of BBM, it was impossible to separate the statistics published for TV5 QC viewers aged 18 to 24 and those aged 55 and over.
- **Surveys.** The use of the Internet to conduct surveys of TV5 QC and TV5-M viewers gave rise to certain technical and administrative difficulties that delayed the availability of results for this line of investigation. The main difficulty was in reaching potential TV5-M viewers.

## 4. Main Findings

### 4.1 Relevance of the TV5 Program

#### 4.1.1 *Relevance of the Program in relation to the Government of Canada's priorities and to PCH's strategic objectives*

The evaluation clearly shows that the TV5 Program is relevant to the Government of Canada's priorities and PCH's strategic objectives.

- ***Government of Canada's priorities.*** Canada's 2005 foreign policy objectives are: first, to promote the country's commercial and economic interests via trade agreements, openness to the world and access to international markets; and second, to encourage a new, more representative multilateralism so that countries with different cultures and capabilities can form mutually beneficial partnerships. Federal participation in TV5 is consistent with these priorities since the TV5 Program helps to promote Canadians' access to a window on the world and to cultural diversity.
  - ▶ The program's relevance is obvious in the context of the Quebec-Canada partnership as described in the funding structure in Section 2.3, which currently is the basis for Canada's participation in TV5. The relevance is equally evident in the context of the overall Canadian participation in the institutional Francophonie at large. The federal government's involvement in La Francophonie is a main feature of Canada's foreign policy, providing an excellent forum for promoting Canadian ideals on governance, cultural diversity, human rights, development, etc. Essentially, the TV5 program is a medium for promoting cultural diversity, the French language and cultural exchanges within the OIF, meeting Canada's foreign policy objectives for the Francophonie.
  - ▶ The evolving nature of the institutional Francophonie in recent years has prompted examination of Canada's role. The examination is giving attention to organizational management within the departments involved in the Francophonie, the structure for coordinating action and the impact of Canada's contribution. An evaluation is now under way regarding Canada's participation in the Francophonie for 2000–05. Along with this larger exercise, the summative evaluation will serve to help the Government of Canada position itself in relation to TV5.
- ***PCH's strategic objectives.*** By participating in TV5, PCH, along with the Government of Canada, endeavours to enable Canadians to communicate with each other and with the world. By fostering Canadians' access to a window on the world and by showcasing Canadian cultural products internationally, the TV5 Program helps meet this priority, which aims for better social cohesion, active participation of Canadians in their country's cultural development and sharing of cultural identities.

#### 4.1.2 *Contribution of the Program to the goal of increasing Canada's influence in the world*

Information gathered in the evaluation shows that Canada's participation in TV5 strengthens the country's influence in the world.

In 2005, the Conference of Ministers Responsible for TV5 adopted the TV5 Charter, which unequivocally reiterates TV5's role by clarifying its overall mission and stating some of its particular missions. The Charter specifies the following:

- As a worldwide network fulfilling a public service mission, TV5 will offer the best possible access to French-language television in the largest number of countries.
- TV5 will work to increase its presence by seeking to reach the largest number of people, to build up their loyalty, to win over new Francophone or non-Francophone audiences, and to promote high-quality broadcasts produced in French worldwide.

Canada's international presence objectives relating to TV5 are to:

- contribute to international efforts to promote cultural diversity, and assert a leadership role within the international Francophonie;
- contribute to disseminating Canadian culture throughout the world;
- offer Canadian producers and artists a showcase for their products abroad;
- give Canadian producers and artists access to a wider, more varied worldwide audience, as well as providing them with an additional source of income via rights paid for the international distribution of their productions; and
- increase the visibility of creators' talents by giving them access to TV5, a vast television network.

These objectives appear to be fully met when placed alongside policy statements of TV5-M, which define the initiative as “the leading global French-language television channel . . . a space for varied expression . . . a general-interest channel presenting a unique vision of the world through news and programming intended to promote and share a diversity of cultures and viewpoints.”<sup>16</sup> Similarly, section 8.1 of the Charter specifies that in its programming the TV5 network must ensure a diversity of geographic origins and forms of audiovisual creativity in French and, when establishing its broadcast schedules, must strive for a balance among programs from areas represented by funding governments.

The TV5 Program has a component that allows for funding of special projects, giving Canadian Francophone producers the opportunity to develop new and original creations that would not always meet the project selection criteria of other channels with programs targeting large audiences (e.g. TQS or LCN channels).<sup>17</sup> TV5 QC broadcasts these creations, some of which are picked up on TV5-M. However, certain programs are also directly produced in collaboration with TV5-M. This is the case, for example, with “24 heures de Vancouver,” a program for discovering Vancouver's modern character and cultural mosaic. Similarly, TV5 QC and TV5-M broadcast many programs produced as part of cultural activities or reminders of significant historic events in the life of Canadian Francophonie or Canada generally.<sup>18</sup> This type of broadcasting, made

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<sup>16</sup> TV5 Monde, *Présentation de TV5 Monde*, <http://www.tv5.org/TV5Site/tv5monde/presentation.php> (page consulted in November 2006).

<sup>17</sup> TV5 QC (2005), Letter and documents from Suzanne Gouin — Special projects: Games of La Francophonie, Cinéma d'ailleurs, assistance fund for Francophone producers outside Quebec; program: “La croisée des chemins”; documentary: “Libération de la Hollande par les soldats canadiens”; program: “Musiques du Monde,” Montréal, February 17, 2005.

<sup>18</sup> Examples are “Les Acadiens de l'Île,” “Chronique d'une renaissance,” “La Fête des Acadiens — 15 août des fous,” the 2005 Fête nationale show in Montréal, or Canada Day.



possible through TV5 QC's export budget, strengthens the relevance of the federal contribution to TV5 and increases Canada's cultural influence in the world via specific productions about the country and its people.

Canadian content and the positioning of Canadian programs are other major indicators for measuring the degree of Canada's influence in the world through its participation in TV5. Canadian content was evaluated as making up about 8.5% of TV5-M's programming schedule in 2006, an increase of 3% since 2004. This data will be analyzed more thoroughly in Section 4.2.

#### ***4.1.3 Contribution of the Program to the objective of enabling Canadians to enjoy a variety of cultural experiences and share them with each other and the world***

The TV5 Program enables Canadians to enjoy diverse cultural experiences and share them with each other and the world. It does this by promoting the ethno-cultural diversity of Canada's Francophone society and making it possible to reach the country's Francophone minority communities.<sup>19</sup>

According to the experts consulted, TV5 QC is a unique cultural vehicle for bringing the international Francophonie to Canada's population because of its ability to broadcast a range of high-quality content from all parts of the Francophone world. It has access to the best content of networks from France, the CFB, Switzerland and some African countries, in addition to benefiting from the excellent quality of special Canadian productions broadcast first on TV5 QC, with very diverse subjects and content.<sup>20</sup> In addition, TV5 QC programming includes productions and films that are often unavailable on other channels. Results of the survey of Canadian viewers confirm this opinion. Some 85% of respondents said they agree with the statement that TV5 QC is a "prime showcase for content that is not available on other channels."

Key stakeholders all have a favourable perception of TV5 QC, agreeing that the channel offers original, high-quality, mainly non-Canadian content that meets viewers' expectations in Canada. TV5 QC offers 85% international content, drawn from TV5-M's stock of programs cleared of rights. As a result, Canadian viewers truly have access to the Francophonie's international culture.

TV5 QC is a general-interest channel, and the stakeholders interviewed stress that it meets the varied needs of an audience interested in culture, news, documentaries and entertainment. The survey shows that, in order of preference, the channel's viewers enjoy news and current events, documentaries, and investigative and special reports. Furthermore:

- 90% of TV5 QC survey respondents plead that TV5 is a channel as essential as Radio-Canada, TVA, Télé-Québec, etc.;
- 64% appreciate the wealth of choice of program types;
- 71% think that TV5 provides them with an opportunity to enjoy a variety of cultural experiences and share them with each other and the world;
- 72% appreciate the program content quality and 82% the language quality on TV5.

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<sup>19</sup> CRTC (2004): TV5 Québec Canada — licence amendment: *Broadcasting Public Notice CRTC 2004-26*, April 23, 2004.

<sup>20</sup> See Section 4.2.3.1, which explores the Program's contribution in detail from a special projects perspective.

TV5 QC is not intended for a large audience, as are Canada's major French-language networks such as Radio-Canada or TVA. Nevertheless, the federal contribution is relevant since TV5 QC's primary goal is to offer international and domestic Francophone content of the highest possible quality, in order to reflect this face of the Canadian and international Francophonie. TV5 QC's market shares are more than respectable (1.2% on average in 2005–06 in Francophone Quebec for the time slot of 6:00 p.m. to 11:00 p.m., Monday to Sunday).<sup>21</sup> By comparison, the ARTV and Historia channels have market shares of 0.6% and 0.7% respectively; while RDI and Télé-Québec — channels with a solid position in the Quebec television scene — have market shares of 1.6% and 3.1% respectively (see Appendix F, Table F-6).

According to the stakeholders and experts consulted, TV5's content must be determined first by programming quality and diversity. Attention to these two factors makes it possible to properly meet the Government of Canada's objectives, as well as the expectations of viewers looking for a new perspective on current affairs, culture and other topics. Generally, stakeholders do not hesitate to describe TV5 QC as an excellent medium for familiarizing Canadians with international as well as national Francophone life. Therefore, TV5 meets three of the objectives underlying Canada's participation in TV5:

- to reach Canada's Francophone communities in and outside Quebec, as well as the rest of the Francophile public;
- to offer Canadians an additional French-language channel presenting a fresh perspective on the various countries of the Francophonie and enabling them to broaden their horizons; and
- to increase the visibility of Canadian creators' talents by giving them access to the vast television network of TV5.

#### ***4.1.4 Relevance of federal participation in TV5 in the current audiovisual context***

Despite the turbulence that is occurring and will continue to occur in the audiovisual sector, Canada's participation in TV5 is relevant and will remain so in the future, since it generates valuable and tangible results.

Most viewers, experts and key stakeholders consulted for the evaluation think that emerging changes in TV5's regulatory, commercial and technical environment affect neither its relevance nor Canada's participation in TV5, at least not in the short term:

- According to the TV5 QC survey findings, the introduction of new technologies does not seem to affect respondents' perception of the relevance of TV5, despite the risks and issues facing the channel. In fact, 40% of respondents find TV5's relevance to be *heightened* by certain phenomena transforming the audiovisual industry (e.g. expansion of signals worldwide or increased access to new television channels); only 18% believe this relevance to be threatened. The analysis of comments accompanying responses to this question shows that respondents do not believe that new channels can match the quality of programs presented on TV5 QC. Although experts foresee an overall decrease in the quality of programming over time, for established channels as well as those now

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<sup>21</sup> Many participants in the evaluation emphasize that market shares are simply an indicator, not a goal.

entering the Canadian market, TV5 QC seems capable of bucking this trend. Its audience is drawn mainly by the channel's programming quality, while more and more channels seek to attract a mass audience with tastes that differ noticeably from those of TV5 QC viewers.

- Regarding the prospects of deregulation in the television sector, experts believe that TV5 will remain totally relevant, since the channel is still a traditional medium in demand from a well-targeted clientele, in accordance with the survey's findings discussed earlier. Today, TV5 QC is the best medium for disseminating international Francophone content in Canada. As for TV5-M, it would continue to be important for disseminating Canadian content internationally, given the current lack of an alternative.
- Stakeholders and experts in the audiovisual sector unanimously agree that television tomorrow will be irrevocably different from what it is like today. Although TV5 QC is seriously exploring the possibility of developing new products on new platforms (e.g. the Internet) to remain competitive and interesting to viewers, the threats looming on the horizon are relatively controlled by the channel's value added. However, the channel's strong position depends on several factors, including future CRTC decisions, which could differ from what experts expect. The next few years will be crucial in this regard. Starting now, the TV5 Program and TV5 QC would benefit from regularly consulting on these issues and considering measures to be taken so that the channel remains relevant and viable in the medium and longer term.

***Highlights***

- The TV5 Program effectively complies with and supports the Government of Canada's international policy priorities, as well as PCH's strategic objectives for bringing Canadians closer to each other and the world.
- There is no doubt about TV5's contribution to Canada's international presence objectives.
- Canada's participation supports TV5 in meeting the channel's objectives, at the same time strengthening Canada's influence within the international Francophonie and the world.
- TV5 QC is an excellent medium for familiarizing Canadians with international as well as national Francophone life, thus enabling them to enjoy diverse cultural experiences and share them with each other and the world.
- In the short term, the changes emerging in TV5's environment should not affect its relevance or Canada's participation in the program.

## 4.2 Success and impact

### 4.2.1 Contribution to Canada's international presence

By participating financially in TV5, the Government of Canada succeeds in promoting Canadian content in the world by supporting the broadcast of Canadian programs on TV5-M.<sup>22</sup> As a result, the TV5 Program contributes to Canada's international presence. The Program yields the desired spin-offs,<sup>23</sup> more specifically as follows:

- ***In the short term***, it expands the audience for programs from countries of the Francophonie and uses TV5-M as an international showcase for Canadian audiovisual products. TV5-M broadcasts French, Canadian, Belgian, Swiss and African programs in over 200 countries throughout the world, attracting a wide audience of Francophones and Francophiles.
- ***In the medium term***, it uses TV5-M as an international showcase for Canadian audiovisual products. Broadcasts of Canadian programs are an excellent showcase for Canadian audiovisual products, benefiting Canadian producers, artists and technicians. This is shown by the popularity of certain programs.
- ***In the long term***, it contributes to Canada's international presence. By attracting an international audience for French-language broadcasts, the Program raises the profile of the international Francophonie.

By very large majorities, 95% of key stakeholders and 90% of experts<sup>24</sup> agree that TV5-M provides Canada with a unique and relatively effective opportunity to raise its profile culturally in the international arena. This finding is confirmed by the following facts on the range and size of TV5-M's audience:

- With its 24.5 million viewers a day and a cumulative audience of over 73 million viewers a week,<sup>25</sup> TV5 is the leading global French-language television network, expanding its range in recent years. The number of homes served has gone from 130 million in 150 countries in 2001<sup>26</sup> to over 171 million in 203 countries and territories today. This demonstrates the expansion of the broadcast signal and consequently the size of the audience.
- This range compares well with that of other international networks analyzed through the literature review:
  - ▶ ARTE-TV, received by over 77 million homes in Europe and Francophone Africa, has 14 million viewers.
  - ▶ EuroNews, received in over 187 million homes in 119 countries, has more than 7 million viewers a week in Europe alone.

<sup>22</sup> The promotion of Canadian content in Canada is not a topic for this subsection, which does not deal with TV5 QC at all.

<sup>23</sup> As defined in the evaluation's Terms of Reference.

<sup>24</sup> Such percentages appearing in this report correspond to the proportion of key stakeholders or experts who stated the opinion mentioned in the text, compared with the number of key stakeholders or experts who agreed to give an opinion on the subject — not compared with the total number of key stakeholders or experts consulted, since they did not all agree to systematically give an opinion on each of the subjects raised by the evaluation team during the interviews.

<sup>25</sup> TV5 Monde (2005), *Plan stratégique TV5 2006-2009 — Projet de plan stratégique TV5 Monde*, August 19, 2005.

<sup>26</sup> Goss Gilroy Inc., op. cit.

- ▶ France 24, launched on December 6, 2006, expects to reach 80 million homes in Europe, the Near and Middle East, Africa, New York and Washington, D.C.
- Subtitling also enables non-Francophone populations to have increased access to TV5-M's programs. TV5-M states that subtitling would increase the audience for certain drama programs by a factor of 4.5.<sup>27</sup> This is therefore a real opportunity to attract more people among TV5-M's 600 million potential viewers, accordingly expanding the showcase for Canadian productions.

The experts view TV5-M's unique place on the international stage as an opportunity that governments should seize because their publicly owned networks' market shares are dwindling with the appearance of new players. For Canada, TV5-M represents an attractive window to be exploited, mainly through the international showcasing of Canadian content from Radio-Canada, Télé-Québec and TV5 QC.

Canadian content in the programming schedule was evaluated at 8.5% for the period from February 1 to November 30, 2006,<sup>28</sup> which is clearly higher than the stated Canadian averages for 2005 (6.2%) and 2004 (5.6%) shown in Table 1. These increases lead to the conclusion that the short-term objective to maintain or increase Canadian programming on TV5-M, as set by the Government of Canada, has initially been reached.

**Table 1 — Canadian Content on TV5-M  
(Percentage of Airtime)**

Year	Non-Francophone Europe	France, Belgium and Switzerland	Africa	Middle East	Asia	Latin America	United States	Average
	Paris	Paris	Dakar	Cairo	Bangkok	Buenos Aires	New York	
2004	5.02	6.10	5.09	6.18	6.21	5.24	5.51	5.62
2005	5.98	6.73	5.93	6.05	6.13	6.17	6.38	6.20

Source: TV5 QC (2005), *Contenu canadien sur TV5 Monde 2005*.

Thus, while contributing scarcely 4.7% of TV5-M's total operating budget,<sup>29</sup> Canada has seen 8.5% of the broadcasting schedule devoted to its programs. Many key stakeholders interviewed (35%) find this situation to be advantageous for Canada. Nevertheless, some would wish that Canada increase its funding for TV5-M to strengthen the Canadian presence on this channel even further. However, it is impossible to state for certain that an increase in Canada's funding to TV5-M would necessarily increase Canadian presence on the channel, since the percentage has increased over a three-year period when Canada's funding did not exceed the threshold of one ninth of TV5-M's common expenses. Other factors are to be considered, such as viewer tastes, the search for a balance between the funding governments' different programs, the needs of the moment for certain types of programs, and certain technical specifics such as the length and format of desired programs.

<sup>27</sup> TV5 Monde (2005), op. cit.

<sup>28</sup> This is an average figure for the seven regional signals managed by TV5-M. Source: TV5 QC.

<sup>29</sup> Combined figure for the contributions of the governments of Canada and Quebec.

The presence of Canadian programs on TV5-M is closely tied to their position in the channel's programming schedule. Most key stakeholders agree that the place given to Canadian programming as a whole left something to be desired. It is somewhat difficult to give a clear picture of the schedules and frequency of Canadian programs on TV5-M:

- The “Grande Ourse” series is broadcast in the middle of the night in several European countries (2:00 a.m.) as well as in France, Belgium and Switzerland (3:00 a.m.).
- The ADISQ gala is also broadcast in the middle of the night (2:20 a.m.) in France, Belgium and Switzerland.
- The “Journal de Radio-Canada” is in a better position, taking up an average of 60 minutes in the slot between 6:00 a.m. and 9:00 a.m. in Europe, Africa and the Middle East, where TV5-M's audience could be larger for language reasons.
- “Catherine” (a series) currently is well positioned in the Middle East, between 6:30 p.m. and 7:30 p.m.

The first two programs would naturally be less known and not very popular because of their poor positioning in the programming schedule, whereas the last two would be more popular since they are positioned more favourably. In addition, the schedule changes every week, making it hard to evaluate expected spin-offs from the positioning of Canadian programs. A more detailed analysis of the programming schedules in different TV5-M time zones would be required to understand the overall positioning of Canadian programs over a year.

Such an analysis would be valuable. However, for the Program to react to the findings, more specific objectives should be established in terms of the desired positioning of Canadian programs. That said, about 30% of key stakeholders (12 of 34)<sup>30</sup> agree that the appointment in September 2005 of a Canadian to the position of assistant director general responsible for programming at TV5-M — a position traditionally held by the French — would foster better visibility of programs from countries other than France. This appointment would be in keeping with the increase in Canadian programming noted earlier. At the very least, it may be thought that having a Canadian in such a strategic position would have a positive impact on Canada's general influence over TV5-M's approaches, if for no other reason than that the person might shed new light on programming issues within the operator. This opinion is widely shared by most key stakeholders, even though the person holding this position will soon reach the end of the two-year term of office.

However, three points in all deserve to be raised, to somewhat qualify the enthusiasm shown by most informants about Canada's international presence via TV5-M:

- The survey of TV5-M viewers shows that, although 63.8% of respondents say they pay attention to program source, 62.5% assert they have little or no knowledge that Canadian programs are broadcast on the channel. Canadian programs seem to arouse only lukewarm interest on the part of international audiences or (as stated before) they are not

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<sup>30</sup> Where all key stakeholders or experts consulted agreed to give an opinion on a subject, the percentage of those giving the opinion mentioned in the text is followed by the actual figure.

given a high profile in the programming schedule, which means that they need to be repositioned.

- News programs represent a significant proportion of Canadian programming on TV5-M. The “Journal de Radio-Canada” alone accounts for about 182 hours a year of the Canadian presence on TV5-M, which can amount to between 390 and 450 hours.<sup>31</sup> If we add broadcasts of programs such as “Le Point” or “5 sur 5,” which are somewhere in between magazine-type and news programs, this category accounts for still more of the programming schedule. Is this really the niche Canada wants to export internationally? For example, during interviews conducted by the evaluation team, seven key stakeholders indicated that the addition of Canadian films to the programming schedule would ensure success in increasing international interest in Canadian programming. This issue must be addressed with the managers of TV5 and representatives of the governments of Quebec and Canada, to decide the relevance of their contribution to Canada’s visibility.
- Finally, France’s lead role in TV5 seems to leave Canada in the shade despite its importance as the second-largest partner in the Organisation Internationale de la Francophonie. In interviews, Swiss and Belgian representatives proved to be less anxious about this point than Canadian stakeholders, whose concerns seem to reflect certain sensitivity about their own cultural distinctiveness.

To analyze these findings, the TV5 program should be able to set targets for achieving its objectives. For example, it would be valuable for the program to determine a satisfactory percentage of airtime for Canadian programming on TV5-M; this would allow the result to be assessed more easily. The same could be done for the positioning of Canadian productions in the programming schedule, as well as the type of programs broadcast on TV5-M (news, entertainment, documentaries, etc.).<sup>32, 33</sup>

In addition, to ensure that Canadian programs are positioned effectively in TV5-M’s programming schedule, it would be valuable to monitor the Programs Committee more closely. TV5-M has a Programs Committee, an operational body enabling the operator to set out its programming needs, fill schedules with programs from broadcasters and exchange any useful information about programs, especially current projects of the partner operators and broadcasters.

Nevertheless, what can be noted is that, overall, TV5-M is an effective window on the world for Canada, at a very low cost by the standards of the television industry. Furthermore, some people find that TV5 is the outcome of a smart strategic investment by Canada and Quebec. As specified, however, adjustments are said to be required.

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<sup>31</sup> Document provided by TV5 QC (2005), *Contenu canadien sur TV5 Monde 2004*.

<sup>32</sup> If needed, the TV5 Program should be able at any time to evaluate the degree to which such targets are achieved at year-end. According to the performance measurement strategy in the 2005 RMAF, PCH is supposed to be able to access such data at no extra charge. It should be noted that the RMAF presents a performance measurement strategy that takes into account certain data that TV5-M is to provide, including TV5’s market shares in France, the CFB and Switzerland, as well as the number of viewers and market shares for three key Canadian programs broadcast in Europe. However, the information required to measure this last indicator is almost unobtainable since TV5-M is unable to survey European homes to learn which are its most popular programs; it can only obtain overall market shares. It would therefore not be appropriate to set targets for this particular indicator.

<sup>33</sup> Targets should be set realistically, especially in line with Canada’s funding for TV5-M, viewer expectations, certain operational constraints (establishing satisfactory broadcast schedules for all funders), etc. Funding governments cannot intervene directly in the management decisions of the network, which remains an autonomous paragonovernmental body. If targets are not met, the Program should consider employing methods that do not violate this autonomy. It would still be desirable to set targets for better evaluating the Program’s future success and impact.

#### 4.2.2 *Contribution to the international Francophonie's presence in Canada and the world*

By supporting a project with the particular mission of serving as a showcase for the entire Francophonie,<sup>34</sup> the TV5 Program helps to raise the profile of the international Francophonie in Canada and the world. It achieves the expected spin-offs,<sup>35</sup> more specifically as follows:

- ***In the long term***, it contributes to the international Francophonie's presence. By attracting an international audience for Francophone broadcasts, the Program helps to raise the profile of the Francophonie internationally.

TV5 helps to raise the profile of the Francophonie primarily through the network's wide range: as stated, it has 73 million viewers a week among a potential audience of 600 million. This makes the network an accessible contact point for the world's various Francophone and Francophile communities.

In the interviews, 80% of experts (4 of 5) and 91% of key stakeholders (31 of 34) emphasized that Canada's contribution to TV5 is fundamental and enriches the international Francophonie, whether via technical cooperation or broadcasting unique audiovisual content for Canadians and others throughout the world. Preliminary findings from the evaluation of Canada's participation in the Francophonie, conducted simultaneously under the aegis of CIDA, confirm this perception, which will probably be validated at the conclusion of that evaluation.

The higher profile of the international Francophonie can take various forms, including the North-South cooperation underscored by the document review. For example, many observers from Francophone African countries, from the OIF and from CIRTEF are regularly invited to attend the Conferences of Ministers Responsible for TV5. In addition, in recent years TV5-M has made special efforts to reach developing countries, particularly by broadcasting the "Journal télévisé africain" or CIRTEF's magazine programs.<sup>36</sup>

Canada participates actively in this sharing of cultural experiences:

- For example, the first broadcasting season of the program "5 sur 5" on TV5-M was very positive, and since 2004 the program has been aired in France and the rest of Europe with TV5-M's direct participation. In addition, several developing countries have become interested in the concept.<sup>37</sup> In fact, the "5 sur 5 Monde" team regularly receives questions from developing countries. A proposal was therefore made to create a partnership with news teams from these countries' public television networks.<sup>38</sup>

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<sup>34</sup> TV5 [project], op. cit.

<sup>35</sup> As defined in the evaluation's Terms of Reference.

<sup>36</sup> TV5-M (2004), *Axes stratégiques 2001-2004 — Bilan et perspectives (février 2004)*, presented at the Conference of Ministers, Québec, February 13, 2004.

<sup>37</sup> TV5-M and SRC (2005), *Diversité culturelle et rayonnement international du savoir-faire canadien dans le cadre de l'émission 5 sur 5*, submission to Canadian Heritage, Montréal, April 2005.

<sup>38</sup> Ibid.



- Canada also contributes to TV5 Africa, through DFAIT since 2005.<sup>39</sup> The goal of Canada's assistance is to facilitate access to the TV5 signal for all African countries and to foster access for African producers, creators and filmmakers to TV5's programming schedule in Africa and throughout the world. Support from the OIF and its member countries for TV5 Africa was introduced in 1992 at Canada's request, as an interim measure until African countries could take over. Nevertheless, it facilitates cultural exchanges between Canada and African countries.

Key stakeholders mention other examples of Canadian achievements that benefit the international Francophonie:

- TV5's Web site was a Canadian initiative. TV5 QC now manages its own site, and since 2003 traffic has grown steadily (increasing by 191% for a total of 163,000 visits in October 2006).
- Canada is also the only country to have contributed to the implementation of TV5's strategic plan for subtitling as well as new measures to increase the network's audience, such as the increased use of innovative distribution platforms. This plan is the cornerstone of the development of TV5, especially TV5-M.

There are other examples of Canada's achievements that support the expression of the Canadian Francophonie's dynamism. Among them: the coverage of major events relating to the Francophonie (Games of La Francophonie, Summits, etc.); the creation of digital content that enriches Francophone Web sites; and partnerships with Quebec's Office de la langue française to facilitate sharing of Quebec's and Canada's language expertise. TV5 QC and its broadcasting partners are central to this effort to contribute to the international Francophonie's development.

These achievements highlight TV5's significance as a focal point for Canada to exert influence. Furthermore, several key stakeholders stress that Canada is the only country presenting news programs from the Americas, giving a value added that complements the contribution of its European partners.

Beyond the achievements, however, TV5's strength seems to lie in its programming diversity involving France, the CFB, Switzerland, Canada, African countries and occasionally other countries of the Francophonie. Concerning TV5-M, almost all key stakeholders assert that the channel would lose much relevance without Canada's participation, even though the country's financial contribution to the total budget is no larger than that of Switzerland or Belgium.

Case studies also help to confirm that the Francophonie truly benefits from Canadian know-how. Canadian productions broadcast on TV5 familiarize Canadians with the international Francophonie and make Canada known abroad. This is substantiated by most experts and key stakeholders, who say that Canadian productions are considered to be of high quality internationally, enriching TV5-M's programming. Furthermore, 43.3% of the respondents in the

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<sup>39</sup> It would be valuable for the TV5 Program, together with DFAIT, to assess whether this funding is managed efficiently, since PCH has expertise in supporting television industries. Furthermore, PCH could consider working with a grant for TV5 Africa, whereas DFAIT is obliged to manage this funding with a contribution, which is procedurally more onerous. It might be worthwhile for PCH to manage all of Canada's funding for TV5. Though this issue is not central to the present evaluation, it would nonetheless permit clarification of PCH's role in the entire Canada-wide effort in connection with the Francophonie, including TV5.

TV5-M viewer survey say they are satisfied with the content quality of Canadian programs, whereas 19.4% say they are dissatisfied and 37.3% have no opinion.<sup>40</sup>

As for TV5 QC, it seems to succeed in offering Canadians a fresh perspective on the Francophonie. With 85% of programs coming from the Francophonie outside Canada, this operator allows viewers to see the world from a much wider angle. In 2005–06, 11.1% of programs shown on TV5 QC came from TV5-M (national or international productions shown first on TV5-M), 8.3% from Switzerland, 3.9% from the CFB, 3.4% from Africa and 58.3% from France. The remaining 15% of programs from Canada focused on making the Canadian Francophonie better known to Canadians themselves. With market shares of 1.2% in Quebec and 0.3% in the rest of Canada,<sup>41</sup> TV5 QC does a respectable job of maintaining its window on the international Francophonie compared with other Canadian and foreign specialty channels, including:

- ARTV, with a market share of 0.6% in Quebec and 0.2% in the rest of Canada;
- Historia, with a market share of 0.7% in Quebec and 0.2% in the rest of Canada; and
- Canal D, with a market share of 2.5% in Quebec and 0.6% in the rest of Canada.<sup>42</sup>

The TV5 QC survey also makes it possible to confirm Canadians' appreciation of the TV5 QC channel as a medium for the international Francophonie. Respondents recognize TV5's contribution in terms of presenting content that is unavailable on other channels, offering information about other countries of the Francophonie, enabling viewers to enjoy diverse cultural experiences, and supporting learning and promotion of the French language (percentage of favourable responses: 85.2%, 84.0%, 71.5% and 67.5% respectively; unfavourable responses mainly below 10%).

These indicators are an indication of the Canadian Francophonie's high profile in Canada and internationally, as well as the international Francophonie's presence throughout the world and in Canada. Canada plays a key role in enriching the international Francophonie, whether by its innovations, its cooperation or (of course) its programming. In exchange for a modest contribution, it achieves its performance objectives within the Francophonie and actively helps to raise the profile of the international Francophonie.

#### ***4.2.3 Contribution to the creation and production of Canadian audiovisual products***

The TV5 Program aims for certain spin-offs in terms of the creation and dissemination of Canadian audiovisual products.<sup>43</sup> More specifically, this means the following:

- ***In the long term, the Program seeks to contribute to the creation and production of Canadian audiovisual products.*** By offering an international showcase for Canadian

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<sup>40</sup> The high proportion of respondents without an opinion essentially reflects TV5-M viewers' habits. In the survey, respondents said they greatly prefer European (especially French) programs to those from Canada or Africa. Also, just 34.5% of respondents are in favour of the idea of showing more Canadian programs on TV5, while 27.6% are against it and 37.9% say they have no preference.

<sup>41</sup> Time slot from Monday to Sunday, 6:00 p.m. to 11:00 p.m.

<sup>42</sup> Statistics for 2005–06, provided by TV5 QC.

<sup>43</sup> As defined in the evaluation's mandate.

audiovisual productions, the Program contributes to the creation and production of Canadian products in this industry.

Support for Canadian audiovisual creation and production is a major objective of the federal contribution to TV5. The 2002 evaluation found little in the way of spin-offs from TV5 for Canadian producers. The following analysis examines this issue by looking at five distinct aspects: funding for special projects, spin-offs for producers, future prospects, opportunities offered by TV5-M via the export budget, and contribution to job creation.

#### *4.2.3.1 Funding for special projects*

Under the licence granted to TV5 QC, the CRTC requires the operator to devote at least 15% of its schedule to Canadian programs and to broadcast at least 104 hours of original Canadian programs. These commitments are clearly being met and even exceeded:

- From 2001 to 2006, the average number of Canadian programming hours on TV5 QC came to 1,118 per year. In 2006, the number was 1,065, representing at least 15% of total programming during prime time.<sup>44</sup>
- In 2005–06, TV5 QC produced 182 hours of Canadian documentaries (one-off programs) and original documentary series. This approach enables the operator to enhance Canada-wide Francophone expertise and to serve as a first window for it.

In addition, the CRTC ruled that each year TV5 QC should invest 40% of its revenues from the previous year in new Canadian programming. To support producers supplying TV5 QC with Canadian content, the operator gives them access to a special projects envelope under the TV5 Program. Table 2 lists projects benefiting from this envelope between 2001 and 2006. It shows that 22 projects by Quebec producers received assistance via the special projects envelope within those years, for a total of \$3,160,178 in funding. Producers outside Quebec received \$373,440 in total funding from the envelope for 14 projects. The envelope is limited and the amounts provided vary substantially from year to year, depending on the number of projects submitted and the budget allowance available.

According to TV5 QC, the special projects envelope serves to encourage Canada's cultural diversity and also to support production outside Quebec. Since 2004, it has particularly focused on funding for producers outside Quebec who submit projects reflecting the Canadian Francophonie's diversity and rich culture, as well as activities related to TV5 QC's marketing and communications. Table 2 shows that the share of the envelope directed to projects from producers outside Quebec increased significantly from 4.7% in 2004 to 33.4% in 2006.

#### *4.2.3.2 Spin-offs for producers*

The case studies show that each production tends to draw its funding from very similar sources:

- TV5 QC plays a key funding role, sometimes covering up to 100% of production costs. The operator directly manages production funds and expectations.

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<sup>44</sup> Source: Data provided by TV5 QC. The average percentage of Canadian programming varies depending on the selected measurement period. With the methods used by TV5 QC, in 2006 it came to 13.33% for a "full day" (6:00 a.m. to 6:00 a.m. the following day), 16.34% for a "CRTC day" (6:00 a.m. to midnight) and 18.86% for "prime time" (6:00 p.m. to midnight).

- The special projects envelope also enables TV5 QC to pre-purchase broadcast licences for a program or series to be presented, often exclusively, on its airwaves.
- Finally, producers generally have access to other federal and provincial funding sources to provide the rest of the funding for their projects.<sup>45</sup>

Producers appreciate the assistance received via the special projects envelope, but many still face a shaky financial situation, especially the minor players.<sup>46</sup> Production costs have greatly increased in recent years, negotiations with broadcasters are general becoming tougher (in the context of consolidation of the audiovisual industry in the hands of a few players), and the updating of infrastructure and equipment to keep up with new technology requires significant investments. Among all key stakeholders consulted by the evaluation team, most who know the situation of producers mentioned the financial difficulties that they regularly face. Nevertheless, three stakeholders emphasize the real impact of the funding provided for special projects on Francophone producers. This impact is also evident in the case studies, which reveal that producers whose licence rights are purchased by TV5 QC benefit from tangible spin-offs, especially if they receive assistance from the special projects envelope. Producers interviewed are unanimous in believing that the government's contribution makes a significant difference to their productions. TV5 QC's special projects envelope and purchasing budget therefore appear to contribute to the creation and production of Canadian audiovisual products, especially for producers outside Quebec.

To increase the benefits of the special projects envelope, it could be valuable to set more specific parameters and criteria for selecting projects. If producers had a better grasp of the evaluation criteria, indications are that more productions would be geared to TV5 QC's needs and expectations for disseminating Francophone Canadian expertise — especially by producers outside Quebec, the envelope's priority targets. This would allow an increase in the results sought by the envelope. The amounts provided from year to year would also be more predictable, especially for independent producers with little or no access to traditional funding sources. As a result, the Government of Canada could more easily evaluate this envelope's spin-offs. Project selection criteria could favour projects truly meeting the Government of Canada's objectives for cultural dissemination of the international and Canadian Francophonie.

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<sup>45</sup> The funds come mostly from: the Société de développement des entreprises culturelles (Quebec); Telefilm Canada; the Canadian Television Fund; tax credits (provincial and federal; federally this program is administered by PCH's Canadian Audio-Visual Certification Office); distribution advances; the National Film Board — Aide au cinéma indépendant — Canada (ACIC); New Brunswick Film; the Bell Fund; the Quebecor Fund; the Rogers Fund; Cogeco; Videotron; Shaw; CIDA (Mass Media Initiative); certain foundations; and sponsorships.

<sup>46</sup> These difficulties were quite clearly highlighted in the 2002 evaluation.

**Table 2 — TV5 QC's Special Projects**

Project	Disbursements in dollars as of August 31 of each year					
	2001	2002	2003	2004	2005	2006
<b>Special projects</b>						
• Games of La Francophonie — opening ceremony	60,000					
• Games of La Francophonie — closing ceremony	119,000					
• À la découverte des uns et des autres	50,000					
• Les jeunes créateurs	140,000					
• Games of La Francophonie — magazine program	120,000					
• Games of La Francophonie — highlights						
• Les arts et les autres	189,468	10,532		15,000		
• Luc Plamondon		35,000				
• Ça me dit 2001 Québec		250,000				
• Super Franco fête			31,500	13,500		
• Le 24 heures à Vancouver			788,017	2,615		
• Un jeu, beaucoup, passionnément			170,173			
• TV5's 15th anniversary gala				100,000		
• Cinéma d'ailleurs				30,152	49,640	
• Chez-nous Chez-vous / Double mixte				61,731		
• Dictée P.G.L. and Webcast of the Colloque Francophonie				33,000		
• Pilot project vignette on literature — minidrama				25,000		
• Les trophées de la langue française					116,000	
• Acadie du nord, Acadie du sud					208,000	
• Nos Canadiens aux Jeux de la Francophonie					89,000	166,000
• Twelve portrait vignettes of Canadian Francophone communities						169,000
• Diversité & Francophonie — une langue aux milles visages — documentary						57,850
<b>Subtotal</b>	<b>738,468</b>	<b>295,532</b>	<b>989,690</b>	<b>280,998</b>	<b>462,640</b>	<b>392,850</b>
<b>Assistance to Francophone producers outside Quebec</b>						
• Lions dans la neige / Amis pour la vie				3,320	5,200	8,280
• La zone des champions				3,500	31,500	
• Moi et les autres				3,000		
• L'ange de Budapest / Wallenberg project				4,000	4,000	24,500
• Vivre en français					16,700	32,300
• Profils					20,000	
• Connors et Blacks Harbour					9,000	14,000
• De virtuel à réel					32,500	
• La croisée des chemins — series I					38,500	60,000
• Une île baroque					5,000	10,000
• Les pêcheurs de l'île Lamèque						6,000
• Gongs et trombones						11,500
• La croisée des chemins — series II						27,640
• Lentement						3,000
<b>Subtotal — producers outside Quebec</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>13,820</b>	<b>162,400</b>	<b>197,220</b>
<b>Total for special projects</b>	<b>738,468</b>	<b>295,532</b>	<b>989,690</b>	<b>294,818</b>	<b>625,040</b>	<b>590,070</b>

Source: Compilation of data provided by TV5 QC.

#### 4.2.3.3 Future prospects

In terms of future economic spin-offs for producers of all origins, the current situation does not allow a clear projection of whether there will be growth, stabilization or a decline. For example, TV5 QC has produced some statistics on its purchases of Canadian programs between 2001–02 and 2005–06 (see Table 3). The consolidated figures vary markedly from year to year, complicating the analysis. It is therefore hard to show a stable trend. However, the figures presented previously in Table 2 indicate a steady increase since 2004 in the number of recipients and the percentage of projects outside Quebec funded and broadcast by TV5 QC.

**Table 3 — Cost of Canadian Programs on TV5 QC, 2002–06**

Item	Cost in dollars as of August 31 of each year					Variation (2002–06)
	2002	2003	2004	2005	2006	
Licences	5,423,464	4,315,540	4,953,816	4,424,411	4,485,760	-17.3%
Subtitling for the hearing-impaired	196,772	218,944	252,331	288,732	297,261	+51.1%
Fees and public performance rights	146,310	177,990	274,667	114,119	151,992	+3.9%
Mechanical reproduction rights	112,629	112,595	133,628	-48,860	35,434	-68.5%
Total	5,879,175	4,825,069	5,614,442	4,778,402	4,970,447	-15.5%

Source: TV5 QC.

One possibility suggested (although without a consensus) was that TV5 QC increase the minimum Canadian presence on its airwaves, for example from 15% to 20% of its programming (in view of the need to make the Canadian Francophonie known to Canadians). In this case, there would most probably be an increase in the budget for purchasing Canadian programs to be broadcast first on TV5 QC.<sup>47</sup> It is too early to come to a conclusion but this would unquestionably have significant and positive consequences for producers, mainly in economic terms. In this regard, two experts emphasize that few Canadian products are found on certain competing specialty channels. TV5 QC makes an effort to show Canadian products but airing of these productions cannot be required if they do not arouse enough interest. According to the two experts, it would be conceivable to maintain the level of Canadian productions for TV5 QC and TV5-M, but difficult to increase it. The Canadian market is after all quite limited, and there may not be interest internationally. Even in Canada, the prospect of increasing the percentage of Canadian programs on TV5 QC arouses little enthusiasm, as shown by the findings of the survey of the channel's viewers. This issue will be examined in detail in Section 4.2.4.3.

#### 4.2.3.4 Opportunities offered by TV5-M via the export budget

TV5-M makes it possible to obtain economic benefits for Canadian producers. TV5 QC's export budget allows rights to be cleared for Canadian productions to be broadcast on TV5-M. The record of this budget for all of Canada since 2001 (see Table 4) shows that it remains a modest budget for the television industry, given that SRC alone has a programming budget of about \$200

<sup>47</sup> According to TV5 QC officials, the Canadian presence on TV5 QC has already far exceeded the 15% threshold. From January 1 to February 23, 2007, it came to an average of 19.39% for "prime time" as understood by the operator (from 6:00 p.m. to midnight). What would be involved here, then, is formalizing the increase and setting the new minimum for Canadian content on TV5 QC at 20%.

million.<sup>48</sup> Nevertheless, the export budget has been growing steadily since 2002, so indications are that producers will continue to benefit increasingly.

**Table 4 — Cost of Clearing Rights to Canadian Programs for Broadcasting on TV5-M, 2002–06**

Year (to December 31)	Export budget in dollars
2002	1,486,988
2003	1,516,868
2004	1,694,449
2005	1,729,388
2006 (estimate)	2,000,000
Variation (2002–06)	+34.5%

Source: TV5 QC.

A breakdown of the 8.5% of Canadian content in TV5-M's programming in 2006 shows that about 1% comes from TV5 QC, which funds original Canadian productions. The rest comes mainly from SRC (about 5%) and its newscasts, plus Télé-Québec and several other Canadian broadcasters.

Does the positioning of Canadian productions in TV5-M's programming schedule provide suitable presentation of Canadian content and a potentially attractive window for prospective purchasers of Canadian programs? The survey of TV5-M viewers suggests that the answer is no.<sup>49</sup> In fact, 62.5% of respondents say they have little or no familiarity with TV5 broadcasts of programs from Canada, compared with 37.5% who say that they are quite or very familiar with such broadcasts. On this topic, six key stakeholders mention the problem of negotiations between TV5 QC and TV5-M with a view to integrating Canadian programs into TV5-M's schedule. That said, the growing Canadian presence on TV5-M in recent years suggests significant increases in the presence of Canadian content internationally. The producers interviewed and 10 key stakeholders believe that TV5 is a good vehicle for exporting Canadian productions: of the four funded productions examined in the case studies, two found a place in TV5-M's programming. However, according to these individuals, expanded Canadian representation would depend on consideration of increased funding for TV5-M.<sup>50</sup> They add that, should an increase in the Canadian presence on TV5-M prove impossible in the short term, the option of paying more for clearing Canadian production rights should be considered.

#### ***4.2.3.5 Contribution to job creation in the television production sector***

The evaluation team questioned the four producers chosen for the case studies about job creation in their industry. Though all asserted that funds from the special projects envelope helped to provide work for their film and production crew, it cannot be concluded that the envelope has created new long-term jobs in the television production sector. A targeted study on the effects

<sup>48</sup> Compared with a programming budget of \$5 million for TV5 QC.

<sup>49</sup> However, the difficulty should be recalled of presenting a clear picture of the schedules and frequency of Canadian programs on TV5-M (as mentioned in Section 4.2.1).

<sup>50</sup> Canadian decision-makers interviewed repeat that Canada faces difficult funding choices at a time when making cutbacks is more fashionable than expanding operations. In such a context, more funding for TV5-M would hardly be conceivable in the short term.

and impacts of the special projects envelope for recipient producers overall would therefore be required to fully assess the impact of the federal contribution to job creation in this sector. Without such a study, it can still be said that TV5 QC contributed to the creation of short-term jobs in television production between 2002 and 2006. While these spin-offs are tangible, at the outset they seem limited.

To the question of whether the Government of Canada's support for TV5 contributes to the creation and production of Canadian audiovisual products, the answer is that it does. However, although producers keenly appreciate the federal government's contribution, especially the special projects envelope, all say that production costs are increasing and production conditions are getting tougher.

At this stage the main point to keep in mind is that TV5 is a good medium for fostering audiovisual production, considering the funding available to purchase broadcasting licences and the place available to present Canadian productions on TV5 QC and TV5-M.

#### ***4.2.4 Contribution to Canadians' access to a window on the Francophonie's cultural diversity***

By helping TV5 QC operate the licence issued by the CRTC under the *Broadcasting Act*<sup>51</sup> for the purposes of broadcasting the TV5 signal throughout Canada, the TV5 Program contributes to giving the Canadian public access to a window on the Francophonie's cultural diversity. The desired spin-offs<sup>52</sup> are as follows:

- ***In the short term***, the Program broadens the audience in Canada for programs from countries of the Francophonie. In Canada, TV5 offers programs from places such as France, the CFB and Switzerland, attracting a broader Canadian audience for French-language programs.
- ***In the medium term***, the Program increases the youth audience and the Francophone audience in Quebec and outside Quebec for TV5 programs from Canada as well as other countries of the Francophonie.
- ***In the long term***, the Program gives the Canadian public access to a window on the Francophonie's cultural diversity. The broadcasting of French-language programs produced by TV5's various partner countries gives Canadians access to the international Francophonie and makes them aware of its cultural diversity.

These findings are supported by analysis of the following indicators: range and audience; medium for discovering the Francophonie; future place of Canadian content on TV5 QC; market development; and visibility of government funding.

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<sup>51</sup> This legislation defines the CRTC's powers regarding operating licences for distributors.

<sup>52</sup> As defined in the evaluation's mandate.



#### 4.2.4.1 Range and audience

Appendix F presents a series of tables (labelled “F”) with details about TV5 QC’s range and audience ratings, as well as its positioning compared with some competing channels. Appendix G contains tables (labelled “G”) conveying the main findings of the evaluation team’s survey of a sample of TV5 QC viewers. Together, these sources provide the information required to draw an accurate picture of the channel’s range and audience in Canada and Quebec.

TV5 QC has significantly increased its range and audience in recent years: as of August 31, 2006, close to 6.5 million Canadian homes subscribed to the channel, an increase of 6.5% from August 31, 2001 (see Table F-1). Throughout the country in 2005–06, the channel had an average of 31,300 viewers a week during prime time,<sup>53</sup> an increase of 59.5% from 2002–03 (see Table F-2). Quebec alone accounts for close to 35% of subscribers but 91.5% of viewers. TV5’s audience is concentrated particularly in the Montréal area, given that the city makes up a significant proportion of Quebec’s population.

An analysis of TV5 QC’s audience profile reveals three main points:

- ***The audience is distinctly older than the average.*** As shown in Table G-27, 76.8% of the survey respondents in 2006 were aged 40 or over, and 35.8% were aged 40 to 54; this compares with Statistics Canada data showing that people aged 40 or over made up 48.1% of the country’s population in that year.<sup>54</sup> Data on audience ratings, available for prime time in Quebec in 2005–06 (see Table F-3) tend to confirm this finding: 68.8% of viewers were aged 18 to 24 or 55 and over,<sup>55</sup> whereas 25% were aged 25 to 54.
- ***The audience has distinctly higher-than-average education.*** As shown in Table G-28, 78.7% of survey respondents in 2006 had university education — 41.5% at the undergraduate level and 37.2% at the postgraduate level. According to Statistics Canada, in 2001 some 15.4% of Canadians had an undergraduate degree and 4.8% a postgraduate degree.<sup>56</sup>
- ***The audience has a higher-than-average income.*** As shown in Table G-26, 79% of survey respondents in 2006 said they had a yearly income of \$30,000 or more (including 43.1% with an income ranging from \$30,000 to \$59,999). According to Statistics Canada, 34.8% of Canadians with an income said they earned \$35,000 or more in 2004.<sup>57</sup> Undoubtedly, TV5 viewers’ incomes are higher partly because of their age and educational level.

The data available for audience ratings in Quebec suggest that the age level of TV5 QC’s viewers (already higher than the average) is continuing to rise. From 2001–02 to 2005–06, the average

<sup>53</sup> Monday to Sunday time slot, 6:00 p.m. to 11:00 p.m.

<sup>54</sup> By contrast, in the survey for the 2002 evaluation, 7.1% of respondents were below age 35, 35.0% were aged 35 to 54, and 57.9% were aged 55 and over. Source: Goss Gilroy Inc., op. cit.

<sup>55</sup> As provided by TV5 QC, the audiometric data gathered by the firm of BBM cannot separate the 18-to-24 age bracket from the 55-and-over age bracket. The evaluation team has asked BBM for specifics about how it determined viewer ratings but the firm has not yet replied. However, it is entirely reasonable to assume that the bulk of the audience is in the 55-and-over age bracket.

<sup>56</sup> In the survey for the 2002 evaluation, 20.2% of respondents had gone to college and 34.5% to university. Source: Goss Gilroy Inc., op. cit.

<sup>57</sup> In the survey for the 2002 evaluation, 35.9% of respondents said they earned less than \$30,000 per year, 30.5% said they earned between \$30,000 and \$49,000, and 33.6% said they earned over \$50,000. Source: Goss Gilroy Inc., op. cit.

number of prime-time viewers aged 18 to 24 or 55 and over climbed from 8,300 to 20,100 a week, an increase of close to 160% (see Table F-3). The result is that this subgroup now represents close to 70% of Quebec viewers for this time slot. At the same time, the number of viewers aged 25 to 54 shrank by 10% from 7,900 to 7,300; this subgroup now represents only 25% of the audience.

As for young people, the audience ratings in Table F-3 show that they are just a peripheral audience for TV5 QC. In 2005–06, the channel attracted an average of only 1,800 Quebec viewers aged 2 to 17 per week during prime time. After a sizable increase from 2001–02 to 2004–05, this number seems to have stabilized or even declined slightly in the last two years. This suggests that TV5 QC is not necessarily a first choice for this market segment, especially young adults.

Market share data tends to confirm the findings discussed here (see Table F-4). It also shows that viewers of TV5 QC are quite loyal to it:

- For all age groups combined, TV5 QC's share of the Quebec Francophone market in prime time went from 0.8% in 2001–02 to 1.2% in 2005–06. The growth is due mainly to an increase in the channel's share of viewers aged 18 to 24 or 55 and over, from 0.8% to 1.9% (more than double).
- TV5 QC's market share of viewers aged 25 to 54 hardly changed, going from 0.8% to 0.7%. The channel's share of viewers aged 2 to 17 dropped from 0.8% to 0.6%.

In terms of competitive positioning, Tables F-5 and F-6 show that, compared with six other French-language specialty channels, TV5 QC ranks in the middle during prime time both in Canada and Quebec. It is behind Télé-Québec, Canal D and RDI, but ahead of ARTV, Historia and TFO.

- In 2005–06, TV5's market shares were 0.3% in Canada and 1.2% in Quebec, compared with 0.8% and 3.1% for Télé-Québec, 0.6% and 2.5% for Canal D, and 0.4% and 1.6% for RDI.<sup>58</sup>
- In both markets, TV5's niche has expanded since 2002–03, while that of its three main competitors either levelled out or diminished.
- Among the channels ranking behind TV5, ARTV achieved some progress, while Historia kept its standing in Canada but lost market share in Quebec.
- As for TFO, its market shares are clearly lower than those of the other channels, mainly because Canada's overwhelmingly Anglophone television audience leaves it with a market share that is close to zero.

All these statistics support the conclusion that TV5 QC is well-positioned in terms of market shares compared with its competitors and that its market is growing, especially in Quebec and particularly Montréal. In all likelihood TV5 QC viewers are more knowledgeable than the

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<sup>58</sup> The strong market shares held by these three competitors are no doubt related to the fact that they have been present in Francophone television for many years.

average because of their age, educational level and income. They are quite loyal to the channel, no doubt because they appreciate its uniqueness, as defined by the content and quality of its programming.

The potential appearance of new channels should contribute to splitting up the market even further, thus limiting TV5's growth prospects. However, if their content is different from that of TV5, these channels should not significantly cut into existing market shares. Nevertheless, TV5 QC may have to fight more fiercely against these newcomers if they target niches that the channel is considering, such as young people's programming, certain types of news programs, etc. The channel's weakness would then be in the number of viewers outside Quebec. Overall, however, TV5 can play a major role in representing Canadian and international Francophone cultural diversity since it has assets (e.g. the quality of its programming) enabling it to defend its market shares in Canada's audiovisual environment.

Here too, the TV5 Program should set targets for each of the performance indicators discussed earlier. TV5 QC's administrators have already begun doing this in their business plans. Consultation between the Program and TV5 QC would be valuable to see whether the channel's objectives could correspond with the Program's, especially in terms of quantifiable data.

#### *4.2.4.2 Medium for discovering the Francophonie*

Over 88% of key stakeholders (30 of 34) recognize the importance of TV5 QC as a window for Canadians on the Francophonie's cultural diversity. These individuals approve of the Government of Canada's support for TV5 QC because, in their opinion, the channel plays an essential role in disseminating international and Canada-wide Francophone culture. The key stakeholders emphasize this role of championing Francophone culture.

The appearance of new American channels<sup>59</sup> has raised the concern of a handful of key stakeholders, who think that Canadian culture is threatened because of its relatively small market, especially the Francophone Canadian market. For these stakeholders, TV5 QC is an effective window for maintaining interest in the Francophonie. In addition, 71% of key stakeholders underscore the uniqueness of TV5 QC's Francophone content. TV5 QC's current international content is not available on other channels in Canada.

Programming quality is also widely recognized by 82% of key stakeholders. The survey of TV5 QC viewers provides highly interesting findings:

- The best-rated aspects of TV5 are language quality and content quality of programming (satisfaction rates of 81.5% and 72.2% respectively), followed by TV5's overall design quality and wealth of choice of program types (66.1% and 64.3%).
- Respondents recognize TV5's role in providing content that is unavailable on other channels, offering information about other countries of the Francophonie, enabling viewers to enjoy diverse cultural experiences, and facilitating learning and promotion of French (percentage of favourable responses: 85.2%, 84.0%, 71.5% and 67.5% respectively; unfavourable responses below 10% in all cases).

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<sup>59</sup> For example, CNBC, Spike TV, TBS, etc.

A study commissioned by TV5 QC in 2003<sup>60</sup> shows that the channel was still “little known” but strongly appreciated. The people surveyed perceived it as a “different” TV channel that “offers a new viewpoint” and “high quality,” “the television of the entire Francophonie” and “our window on the world, on the international scene.” Respondents also emphasized that outside Quebec “TV5 is a key player for transmitting the French language.” As analyzed previously, the present survey results seem to confirm this observation.

Following are some of the comments made by at least three key stakeholders:

- TV5 helps viewers to discover what is happening elsewhere in the world, and then to understand why the Government of Canada must be involved on the international stage.
- TV5 QC offers a vision of the world from a different angle and enriches Canadians’ outlook on what is happening outside Canada.
- TV5 QC is a prime showcase for producers to present their creations, which would not easily find a place on other very specialized channels or channels aimed at mass audiences.
- More generally, TV5 QC’s broadcast licence purchases and the special projects envelope make possible many valuable projects on the Francophonie (see Section 4.2.3).

Four of the five experts fully agree that TV5 QC is a valuable cultural medium for making Canadians aware of the international and Canadian Francophonie. These experts say that in cost-benefit terms, TV5 QC has a clear advantage, with broadcasting rights cleared for 85% of its programming. Via subscription revenues — again, accounting for about 71% of its total budget — the operator is performing well and producing significant spin-offs in the cultural area, especially by exposing Canadians to an international Francophone viewpoint on many subjects and by providing a better understanding of the Canada-wide Francophonie.

These comments are in line with the statistical analysis findings. Market shares are increasing because the channel successfully fulfills its role as a window on the Francophonie’s cultural diversity, which viewers appreciate. The federal contribution to the TV5 Program thus produces tangible results, making long-term expectations about Canadians’ access to a window on the Francophonie’s cultural diversity more realistic.

#### ***4.2.4.3 Future place of Canadian content on TV5 QC***

Despite what has been said, key stakeholders and experts disagree on one significant issue: the future place of Canadian content on TV5 QC.

- Eleven informants clearly indicate that the percentage of TV5 QC’s Canadian content, though of excellent quality, should not increase since the channel’s primary goal is to present international content available only on TV5 QC. This view is reflected in the TV5 QC audience survey, which shows that most respondents would not at all want to see an increase in the number of Canadian programs on TV5 QC (23.1% in favour, 44.8% opposed). These findings can be compared to those of the 2002 evaluation survey.

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<sup>60</sup>Leduc Marketing (2003), *Perception de TV5 : besoins et attentes des téléspectateurs — Étude pan-canadienne*, submitted to TV5 Québec Canada, Montréal, June 17, 2003.

At the time, respondents were less opposed to more Canadian programs (38.4% in favour, 25.1% against).

- Some 29% of key stakeholders show support for an increase in airtime devoted to Canadian productions. Some of them say that TV5 QC's mission is to carry *at least* 15% Canadian content, not a *maximum* of 15%. Most of these stakeholders note that a key role of TV5 QC is to broadcast high-quality Canadian productions, which would have difficulty finding distribution with other broadcasters and which offer an original product, enabling Canadians to get to know each other better and appreciate the value of their country's culture. In their opinion, that is a basic objective for Canada in terms of the Canadian Francophonie.<sup>61</sup>

These findings are to be put in perspective with TV5 QC viewer needs over time. Who will be tomorrow's TV5 QC audience? Experts predict it will be composed of more and more expatriates and immigrants connected to or interested in the Francophonie; the audience will also grow among people of Canadian origin who are aware of the quality of TV5 QC's international and domestic programming. Programming choices must be made that meet the needs of existing viewers but are also in line with TV5 QC's mission of promoting culture. In addition, the choices must also leave open the opportunity of continuing to arouse the curiosity of the Canadian public in general.

The TV5 QC survey provides useful information for determining which programs are most appreciated and which programming approaches would be best for the future:

- In the present programming, news and current events are clearly preferred by respondents, accounting for close to half of all responses gathered. Respondents seem to be as fond of documentaries as of investigative and special reports.
- Regarding future programming, respondents would mainly like to have more films (37.6% make this their first choice).
- Close to 75% of respondents pay attention to the programs' country of origin and chiefly prefer programs from France (a first choice for 56.5% of them). In comparison, Canadian programs attract much less interest and are third in average rankings, behind European countries other than France.

This entire debate raises the issue of balance in TV5 QC's programming, between programs from partner countries and from Canada. Consumer tastes are only one ingredient in the recipe for such a balance. The other essential ingredient is the programming's diversity of sources. In this discussion, the following observations are crucial:

- To a certain extent programming share reflects the contribution of each partner country. In 2005–06, 58.3% of programs were from France, 15% from Canada, 11.1% from TV5-M (productions funded by and for this operator), 8.3% from Switzerland, 3.9% from the CFB and 3.4% from Africa. This breakdown especially reflects the fact that

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<sup>61</sup> It is important to specify here that TV5 QC was previously broadcasting more programs from other Canadian channels, including Radio-Canada and Télé-Québec. In recent years, the channel made a special effort to be a first window for original Canadian content (182 hours in 2005–06). It is therefore possible that this shift, once it is more fully recognized, will cause certain opinions to change, but such a possibility cannot be counted on.

grants from France cover about 84% of TV5-M's budget, with the result that more French programs will be offered to TV5 QC. However, it is interesting to note that in 2004–05, programs from France accounted for 53% of programming, those from the CFB for 8% and those from Switzerland for 10%. Is the rise in the proportion of French programs on TV5 QC simply the result of a particular strategy? Not necessarily, but to maintain a balance in program presentation, special attention must be paid to the place TV5 QC gives to programming not from France.

- It is possible to make a link between viewer preferences and the broadcasting of programs from the different partner countries. For example, programs from France are by far the most popular according to the TV5 QC survey (56.5% of respondents prefer programs from France to those from elsewhere) and they take up the largest share of the channel's programming. However, it is impossible to determine whether viewer preferences dictate the choice of programs or rather whether the availability of programs shapes viewer tastes. Here supply and demand are inextricably linked.
- Finally, the evaluation team notes that TV5 managers give more importance to the quality of the network's content than to government funding issues or preferences expressed by viewers. This approach is in line with section 6 of the TV5 Charter, which says that the network is particularly committed to being a model of technical, professional and artistic quality within the means at its disposal. Therefore, the correlation between the contribution of funds from sponsor countries, audience expectations and the quality of programs, as well as their positioning in the programming schedule, does not need to be perfect in the eyes of TV5 decision-makers.

This analysis shows that news programs are very popular and that viewers would like to see more films on TV5 QC. Also, programs from France and Europe are more valued than those from Canada; of course this can be explained by the fact that Canadian viewers have no other choice than TV5 QC for access to certain programs from the project's European partner channels.<sup>62</sup> This does not augur well for the idea of a possible increase in Canadian programming in TV5 QC's schedule, which would basically focus on one-off documentaries and documentary series, if one were to rely on TV5 QC's trend in choosing programs since 2000–01.<sup>63</sup> However, since documentaries rank second in TV5 QC audience interest, it is conceivable that original Canadian programs of this type could still find a special niche on TV5 QC, thus justifying an increased presence in the programming schedule.

#### **4.2.4.4 Market development**

According to some key stakeholders, subtitling could be used to attract more English-speaking Canadian viewers. TV5 QC's strategy for developing the market outside Quebec was updated in 2005. It mainly calls for:

- a promotional campaign among target audiences and a marketing campaign among broadcasters;

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<sup>62</sup> Even though Canadian productions are unique and specific to the channel.

<sup>63</sup> The magazine programs' share fell sharply to 39.4%. Replacing them were one-off documentaries and documentary series, accounting respectively for 21% and 29% of programs purchased in 2005–06. At the same time, TV5 QC has seemed to be steadily losing interest in supplements and variety shows.

- a pilot project for subtitling prime-time programs in English;
- cooperation with key players to promote TV5 QC's presence and purpose outside Quebec; and
- linking programming strategies with communications and marketing activities that specifically target Francophones and Francophiles.<sup>64</sup>

These are mostly marketing strategies, the results of which can be evaluated in coming years. It would be valuable to measure the potential of subtitling for the English-speaking Canadian market. There could be an educational potential for learners of French, but the programming would have to be adapted and, according to one stakeholder, this is not financially feasible. This question, put forward by PCH, did not receive a unanimous answer from the various sources consulted by the evaluation team:

- Some 35% of key stakeholders think that the education component should not be part of TV5 QC's mandate.
- In contrast, 41% of key stakeholders believe this to be an interesting option, an advantage that TV5 QC could offer to teachers and learners of French. Two experts are of the same opinion.
- The survey shows that while 49.3% of respondents say they are personally satisfied with the current use of TV5 QC as an educational resource, 67.5% agree that the channel plays a useful role for learning and promoting the French language in Canada.

Despite the lack of consensus, and even though the channel is not making significant inroads outside Quebec, it is a major tool for promoting Canadian bilingualism. TV5 QC gives access throughout Canada to high-quality French-language television service, with a fresh perspective on the international and Canadian Francophonie.

Another potential medium for market development concerns young people.<sup>65</sup> The 2002 evaluation identified "some dissatisfaction among young Canadian television viewers of TV5." Because one of TV5's objectives is to develop the widest possible audience, the evaluation recommended that the Government of Canada, as a contributor of funds for the channel, encourage diversification of targeted audiences. The statistical analysis shows that young viewers make up a marginal proportion of TV5 QC's prime-time audience and that their total numbers grew somewhat before stabilizing in the last two years. There has thus been no decisive improvement in the situation since the 2002 evaluation's recommendation.

Concerning the place to be made for young people, it would have been valuable to get their opinion. Unfortunately, just six people aged under 20 responded to the TV5 QC viewer survey, an insufficient sample for analysis purposes. Though the opinion of young people is unknown, it is informative to consider comments of key stakeholders, who are divided on the issue:

- Some 29% of key stakeholders clearly argue for a greater place for young people, whether by adding films to reach them, or music, or even programs for children and teenagers. This would make TV5 QC a channel for the whole family.

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<sup>64</sup> TV5 QC (2005), *Plan d'affaires 2005-2006*, June 2005, p. 35.

<sup>65</sup> As shown, for example, by the popularity of specialty channels such as VRAK TV.

- In contrast, 38% of stakeholders think young people do not represent a significant niche for TV5 QC. In their view, the operator should not be expected to make any special effort to attract this viewer group, especially if doing so might alienate the current audience, which is older and already loyal.

TV5 QC's business plans mention that young adults are in the channel's sights for expanding its market on conventional television as well as the Internet. Using the Internet would allow TV5 QC to try to reach young people and offer them high-quality content meeting their needs, while continuing to provide television programming that satisfies loyal audiences. The Internet could also serve as a tool for learning French; the content would be designed for schools.

This approach, proposed in a new survey dealing with matters such as TV5 QC's educational role, would most probably be better received than the present study's survey findings suggest. Generally speaking, TV5 QC survey respondents are resistant to the idea of TV5 presenting more programs for young people (24.4% in favour, 34.2% opposed). A follow-up of the 2002 evaluation's recommendation could therefore be studied by the federal government and TV5 QC's decision-making bodies. While particular attention may be given to young people in the coming years, it is up to TV5 QC to fine-tune its expansion strategy and determine the place to be made for this viewer group.

#### *4.2.4.5 Visibility of government funding*

The general public is almost unaware of the Government of Canada's contribution to TV5. In this regard, the 2002 evaluation recommended the following: "Since the majority of TV5 viewers are not aware of the federal government's contribution to TV5, the program managers should find a way of conveying this information to Canadians." Following this recommendation, PCH "strengthened the clauses relating to this issue in its contribution agreements."

In the TV5 QC survey conducted for the present evaluation, 44.5% of participants said they believe TV5 receives money from the federal government, 46.3% said they believe the opposite and 9.2% did not know. In the survey conducted for the 2002 evaluation, the corresponding figures were 30%, 37% and 33%. Canadians thus seem to have a clearer view of Canada's participation in TV5, although not necessarily an accurate one. Among the stakeholders interviewed, six of them find that the visibility of the federal contribution remains important, though not a top issue. Nevertheless, the Government of Canada's objective is still to make its participation in TV5 QC known. Despite the improvement noted since 2002, the fact remains that there is still work to be done.



**Highlights**

- The TV5 Program generates tangible results.
- Canada has increased its share of programming on TV5-M since 2004 and now holds what is considered a strong position, especially in relation to its investment. Nevertheless, improvements could be made, especially in the positioning of Canadian programs in TV5-M's programming schedule.
- The TV5 Program should be able to set targets for meeting its objectives, enabling it to analyze TV5-M's results in relation to more specific expectations.
- Given viewers' preferences, TV5 is managing to defend and even strengthen its niche in a highly competitive market.
- The TV5 Program contributes to the international Francophonie's presence through its cooperative television efforts and the content of Canadian programming on TV5 QC and TV5-M.
- TV5 QC enjoys a solid reputation among its loyal viewers, who are generally adults.
- Canadian programming decisions on TV5 QC are complex since they must take into account viewer preferences, producers' needs, and the strategic expectations of the channel's administrators and managers.
- In Canada, it would be hard for TV5 QC to cost-effectively penetrate new markets. Most TV5 QC viewers do not consider the channel to be particularly designed for young audiences. Statistical trends also show that it is hard for the channel to penetrate non-Francophone markets in Canada. While this may be the case, new distribution platforms such as the Internet could reach these audiences, especially young people and learners of French, complementing conventional television broadcasting. The coming years will be crucial for evaluating the effectiveness of these options.
- The TV5 Program contributes to Canadian audiovisual production, especially since many special productions for TV5 QC would not have materialized without the support provided to the operator via the special projects envelope. It would be helpful not only for the federal government but for Canadian producers to have a set of well-defined criteria for choosing projects to be supported via this envelope.

## **4.3 Cost-effectiveness / alternatives**

### **4.3.1 Efficiency of the TV5 Program**

The summative evaluation did not look into the issue of the efficiency of both TV5 operators in the traditional sense of the relationship between work planned and work performed, taking into account the human, material and financial resources invested. Nevertheless, certain indications support the conclusion that the Program seems to be operated efficiently and cost-effectively:

- TV5 QC's income statement for the fiscal year ending August 31, 2006, sets out actual revenues and expenses of \$12.3 million; this amount is about 3% higher than the \$11.9 million in budgeted revenues and expenses. Maintaining this balance shows TV5 QC's ability to run its operations well without significant overspending.

- In terms of TV5 QC's expenditures, program costs account for 40.5% of the actual total, compared with 32.7% for committed costs (staff,<sup>66</sup> operations, rent, maintenance and amortization), 11.7% for production and technology costs, and 10.2% for communications and marketing costs. Given the overall reasonable nature of operating costs as well as the positive ratio between TV5 QC's performance, on the one hand, and the modest nature of the funding provided by the TV5 Program on the other hand, it may be concluded that the Program's investment has been cost-effective.
- Concerning TV5-M, the evaluation studied the projected budget for the 2005 fiscal year.<sup>67</sup> The breakdown of expenditures among the main items was as follows: 46.6% for program costs; 33.1% for technical costs (satellites, production and broadcasting system, etc.); 15.5% for communications, distribution and marketing costs; and 4.9% for committed costs. By comparison, in 2005 the ARTE-TV channel devoted 64.7% of its actual expenditures to program costs, versus 24.7% to staff and operations, 7.7% to broadcasting, 2.4% to communications and 0.6% to multimedia. Although such sketchy information does not support any definitive conclusion, the appropriateness of Canada's financial contribution as compared with its share of TV5-M's programming and the spin-offs resulting from this programming suggests that the TV5 Program's investment has been cost-effective.<sup>68</sup>
- Concerning the TV5 Program itself, the evaluation team made a brief analysis comparing its 2005–06 fiscal year with that of two other initiatives managed by PCH and suggested by the TV5 Program for comparison purposes. First is the Book Publishing Industry Development Program, which supports the Association for the Export of Canadian Books; second is the Commonwealth Games Support Program. Table 5 presents the relevant data. Using the ratio of the division of management costs per envelope as criterion yields a coefficient of 1.5% for the TV5 Program, 1.4% for the Book Publishing Industry Development Program and 8.7% for the Sport Support Program envelope intended for the Commonwealth Games. As for the number of full-time employees required to manage these envelopes, each employee managed the equivalent of \$5.5 million for the TV5 Program, about \$4 million for the Book Publishing Industry Development Program and \$805,000 for the envelope intended to support the Commonwealth Games. Regardless of the degree to which the objectives of these three initiatives were met, the analysis shows that the TV5 Program compares well with the other two in terms of use of resources allocated for management. Particularly noteworthy is the divergence from the Commonwealth Games Support Program, which suggests that the TV5 Program knows how to exploit the economies of scale provided by allocating modest human and financial resources for the management of quite large-scale budgetary envelopes.

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<sup>66</sup> According to data provided by TV5 QC, in 2004–05 the operator's workforce consisted of about 40 full-time equivalents (FTEs), as follows: 27 officers, six translators and three resources allocated to liaison with TV5-M on full-time basis; three officers and six translators on part-time basis.

<sup>67</sup> However, the team was unable to obtain the operator's actual income statement for this period.

<sup>68</sup> Another indication comes from a speech by Clément Duhaime, Administrator of the OIF, delivered in Montréal on October 11, 2006. Mr. Duhaime mentions that TV5's efficiency is fully recognized by the OIF, which considers this channel to be the most successful of the four operating agencies of La Francophonie in terms of management and results achievement.

**Table 5 — Comparison of Three Programs Managed by PCH, 2005–06**

Item	TV5 Program	Book Publishing Industry Development Program	Commonwealth Games Support Program
Envelope	\$7,200,000	\$4,800,000	\$402,500
Workforce	1.3 FTEs	One project officer with sporadic support from a manager and directors	0.5 FTE (two officers each devoting 25% of their time)
Salaries (time devoted to the program)	\$100,000	\$60,000	\$33,383
Travel costs	\$7,500		\$1,500
Other operating costs	\$2,500	\$8,000	
Total management costs	\$110,000	\$68,000	\$34,883

Source: TV5 Program.

One last point to note concerning the TV5 Program's efficiency is its complementarity with the other financial assistance programs offered to producers, especially those making use of the special projects envelope (see Section 4.2.3.2, particularly note 45). Depending on the type of program they create, producers can benefit from more than one source of assistance, including tax credits, the purchase of a broadcasting licence by the broadcaster, and funding from special funds such as the Canadian Television Fund or private-sector funds. According to key stakeholders who were involved in managing the special projects envelope, it should normally allow support for productions that would be ineligible for the other existing assistance funds, or it should allow TV5 QC to clear the licence rights of Canadian productions that are to be premiered on the channel. The special projects envelope aims to be a genuinely complementary tool for creators who may have difficulty accessing different forms of support. Given its mandate and audience, support from the TV5 Program does not duplicate that provided by Radio-Canada or other sources.

#### **4.3.2 Effectiveness of strategies and methods used**

TV5 is attempting to develop new strategies that would enable the channel to remain as competitive, efficient and cost-effective as possible. By supporting these efforts, the Government of Canada contributes to achievement of the desired spin-offs,<sup>69</sup> especially in terms of the following:

- ***In the medium term, diversifying TV5 QC's funding sources in Canada by increasing new revenue sources to preserve TV5 QC's cost-effectiveness without weakening its ability to meet its objectives*** — maintaining the role of both levels of government.

##### **4.3.2.1A constantly changing television environment**

At first glance, an examination of the current technical and regulatory environment in which TV5 QC operates tends to cast doubt on the channel's viability. However, the evaluation team

<sup>69</sup> As defined in the evaluation's Terms of Reference.

does not think that there are grounds for such doubt, at least not in the short term (although there are some specific challenges and risks in this regard, dealt with in detail in Section 6):

- TV5 QC is moving toward the digital television, but its place in the cable operators' basic digital packages is not assured. Distributed via the basic analog and digital service of Class 1 terrestrial broadcasting distribution undertakings, the channel has undertaken to provide a greater portion of its content in digital mode. This is a significant advance at a time when about half of cable television subscribers have already made the transition.<sup>70</sup> However, within the basic digital packages offered by the major distributors, TV5 QC must be careful not to lose the positioning it now enjoys in the case of analog. To do this, it must make major negotiating efforts to maintain an attractive position with distributors. Its main task will be to convince the Francophone and Francophile audience that TV5 is a unique and relevant channel in Canada's new television environment. Support from TV5 QC's traditional audience will be all the more important since the operator could eventually decide to increase subscription fees to generate the revenues required to finance the transition to digital format; this amounts to handing the bill on to subscribers.
- In the case of high definition television, TV5 QC has decided not to act as a leader, though some of its Canadian productions now on the air were filmed in high definition. However, the operator plans to analyze the impact of the transition to this new technology in coming years until 2009. TV5 QC's European partners are somewhat behind in the transition to high definition; since they provide 85% of TV5 QC's content, their delay may slow down the channel's shift to high definition or increase costs for converting their signal.
- Another topical issue is television sector deregulation, which could increase the number of channels offered to Canadians. In its business plan, TV5 QC addresses the fierce competition between broadcasters that could result from deregulation in Canada, but does not specify an approach for countering potential adverse effects of the change. However, the TV5 QC survey findings tend to show that the channel's audience is quite loyal. Despite the inevitable and constant risk of loss of viewers, indications are that the audience will remain loyal regardless of the emergence of competing channels. This will of course depend greatly on the type of content newly made available by channels entering the Canadian market. Nevertheless, according to the experts consulted, it would be surprising in the short term for the CRTC to agree to jeopardize TV5 QC's continued existence by allowing channels providing content to TV5-M and TV5 QC to broadcast their programs directly in Canada — despite the present trend toward liberalization of airwaves (see Section 1.2).

#### *4.3.2.2 Diversification of funding sources*

In addition to the factors described, other challenges confront broadcasters trying to maintain or ensure their cost-effectiveness. The current upheaval thus is putting increased pressure on TV5 QC to guarantee its long-term survival by increasing its self-generated revenue stream.

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<sup>70</sup> Furthermore, the sector is growing rapidly. TV5 QC estimates that by November 2007, 60% of cable television subscribers in Canada will have switched to digital.

Prompting reflection about the relevance of new participation models, the need to find additional financial resources has not escaped the awareness of managers of TV5-M or TV5 QC. This issue was addressed during recent Conferences of Ministers, and funding governments are considering the possibility of diversifying funding or economizing at the structural level.

The first of the two courses suggested, funding diversification, includes several potential options.

- **Use of advertising.** The 2002 evaluation proposed assessing “the cost-effectiveness of participant suggestions regarding potential additional sources of funding, including broadcast advertising.”<sup>71</sup> Efforts have been made in this regard:
  - ▶ As mentioned, TV5 QC obtained a change to its licence conditions from the CRTC, enabling it to broadcast 12 minutes of advertising per hour. In 2006, advertising appeared on its signal. In 2005–06, this source provided less than 1% of revenues, and TV5 QC’s management does not expect it to account for much of the funding structure — maybe 2% or 3% at the most.
  - ▶ TV5-M’s managers are also aware of the necessity to increase advertising resources, which generated 4.2% of revenues in 2004–05. They acknowledge that “in the context of tight public budgets [...] TV5 must explore any avenue.”<sup>72</sup> This commitment to explore is expressed by both TV5-M and TV5 QC.

Concerning diversification of funding sources, 79% of stakeholders consulted propose looking at what advertising could offer. Three or four key stakeholders reinforce their comments, usually noting the constraints related to the use of advertising. Since 85% of TV5 QC programming comes from TV5-M, the channel is very limited in the advertising it can fit into its programming schedule:

- ▶ According to TV5 QC, half of foreign partner channels providing programs via TV5-M forbid the Canadian operator to broadcast advertising during certain programs. Commercials may only be clustered at the end or start of programs, thus limiting advertising time (a few minutes per hour instead of 12, as is the case now) and decreasing the capacity for earning significant advertising revenues.
- ▶ The advertising base is becoming fragmented among the increasingly numerous channels that show commercials in Canada. This could cut revenues for the broadcasting industry. Unless there is at least an equivalent increase in the industry’s total advertising base,<sup>73</sup> the increase in the number of channels threatens to reduce the share that each can hope to win, to the disadvantage of less competitive channels.
- ▶ The type of advertising can also be a barrier. It is not easy for TV5 QC to identify the types of goods or services that could arouse strong interest among its viewers.

All in all, the place of advertising in TV5’s funding strategy seems limited. In TV5 QC’s specific case, the channel must see how the situation develops and how the introduction

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<sup>71</sup> Goss Gilroy Inc., op. cit.

<sup>72</sup> TV5-M (2005), *Plan stratégique...*, op. cit., p. 28.

<sup>73</sup> This prospect does not seem very likely.

of advertising influences viewers' perceptions. It can already be said that most survey respondents are against the idea of TV5 QC's showing more advertising to increase its funding (14.3% in favour, 65.2% against). A more detailed study should be conducted to evaluate the potential of advertising for TV5 QC in view of the constraints discussed here.

- **Increasing subscription revenues.** This is an option for TV5 QC, which already receives a significant share of its funding from this source. The channel's management has strong hopes for this approach, counting particularly on the expansion of satellite services.<sup>74</sup>
  - ▶ Regarding TV5 QC's cable revenues, it is important to specify that they are based on a rate determined by the CRTC, which cable operators charge television customers who have cable installed. In Quebec the rate is \$0.28, while in the rest of Canada it is between \$0.02 and \$0.06.
  - ▶ As mentioned earlier, the issue here is the approaching deregulation of broadcasting. TV5 QC is currently trying to be included under section 9(1)(h) of the *Broadcasting Act*, which allows broadcasters to remain part of the mandatory digital package to be offered by cable operators as of 2010. By keeping this select place while also being distributed digitally, TV5 QC would be sure to continue earning its subscription revenues. Given TV5 QC's specific and unique role, its chances are good of winning a special place in cable operators' digital packages.<sup>75</sup>
- **Contributions from partners.** Another money-making strategy available to operators is finding new partners or increasing the contribution of existing ones. Possible scenarios include the increased involvement of certain Canadian provinces, the search for sponsors or private-sector participation. None of these approaches seems to be viable or resulting in a consensus for the time being.<sup>76</sup>

The second line of thought involves a spending cut. This is a distinct issue in itself. However, the urgent need to search for additional financial resources cannot be divorced from operators' resource needs; hence the interest in considering cutbacks. Such considerations include the following options:

- **Budget rationalization.** TV5 QC has already recovered funds from envelopes devoted to committed costs, program costs, and production and technology costs. It was possible to

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<sup>74</sup> TV5 QC (2005), *Bilan de TV5 Québec Canada*, p. 19.

<sup>75</sup> It should be noted that, with the goal of evaluating the potential risk posed by new technologies to the development of Canadian culture, the CRTC will study the relevance and objectives of the *Broadcasting Act* to see whether certain of its objectives should be given priority over others. Furthermore, the CRTC will examine whether the current asymmetrical regulation between broadcasting services and new services should be changed, or whether the market should be left to find the balance between existing players. The Commission must also ensure that there are sufficient resources to monitor advances in the development, contribution and impact of audiovisual technologies in the Canadian broadcasting system, in addition to seeing whether new funding approaches or other reforms could be considered outside the Act. Finally, the issue of the period for action allowed to decision-makers must be raised. Source: CRTC (2006), *The Future Environment Facing the Canadian Broadcasting System: A report prepared pursuant to section 15 of the Broadcasting Act*, Ottawa, December 14, 2006.

<sup>76</sup> For example, regarding the idea of re-inviting private-sector funders to the TV5 QC table, three experts and 18 key stakeholders respond that TV5 must remain managed solely by government partners, since private- and public-sector players have fundamentally different objectives. Three key stakeholders mention that the financial contribution to TV5 QC from the private sector was always limited in the past because of complications arising in terms of management of the channel. However, six key stakeholders specify that limited partnerships with the private sector would nevertheless be beneficial.

reinvest a sizable portion of these amounts in communications and marketing activities to make the channel better known (an increase from \$537,358 in December 2003 to \$1,255,216 as of August 31, 2006).<sup>77</sup>

- **Service review.** Resource-related concerns are leading certain TV5-M executives to think about the service agreements between TV5-M and TV5 QC, especially for subtitling in Portuguese and Spanish.<sup>78</sup> The operating agreement between TV5 QC and TV5-M<sup>79</sup> specifies the responsibility given to TV5 QC for subtitling. TV5-M purchases subtitling services from TV5 QC, providing the latter with an appreciable income (\$725,401 in 2005–06). Seven key stakeholders support this initiative, emphasizing that subtitling is not used as effectively as possible at TV5 QC.<sup>80</sup>

The preceding analysis underscores the genuine efforts being made by the operators, especially TV5 QC, to explore new options for drawing on additional resources. This allows for an assessment of what has been accomplished since the 2002 evaluation issued its recommendation. It appears that the TV5 Program has acted on this recommendation.

In conclusion, the main revenue streams, at least in the short term, will remain: government funding, especially for TV5-M; subscription revenues, especially for TV5 QC; and, to a lesser extent, advertising for both operators.

It is interesting to note that the possibility of *increasing* government funding is scarcely being considered for the moment:

- Regarding TV5-M, France is currently pressuring the other funding governments, including Canada, to assume part of the specific costs that it traditionally has covered alone.<sup>81</sup> Almost all key stakeholders and experts immediately recognize the need for increasing Canada's funding for TV5-M. However, some find it unlikely that the federal government will increase its contribution in the current budget situation, when the focus is on savings.
- Regarding TV5 QC, the possibility of an increased contribution from the governments seems just as unrealistic. Instead, after *reducing* its contribution to TV5 from \$10.3 million<sup>82</sup> in 2001 to \$7.2 million in 2006, the federal government — itself grappling with growing pressures to rationalize expenditures — has joined other funding governments in encouraging operators, including TV5 QC, to count increasingly on their own resources.

As for spending cuts, it is important to mention a point stressed by 44% of key stakeholders (15 of 34): the quest for cost-effectiveness and budgetary efficiency should never jeopardize

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<sup>77</sup> Source: TV5 QC's income statement for the fiscal year ending August 31, 2006.

<sup>78</sup> TV5 Monde (2005), *XIX Conference of TV5 Ministers — Minutes*, Brussels, September 19, 2005.

<sup>79</sup> TV5 Monde and CTQC (2002), *Convention opérationnelle entre TV5-M et le CTQC*, meeting of TV5's senior officials, Paris, March 25, 2002.

<sup>80</sup> From the data available, no conclusion can be drawn about the profitability of TV5 QC's subtitling operations. The stakeholders cited find that the service would be less expensive if it was moved to another location; this would be a better use of funds for TV5-M. However, the agreements governing the service were ratified by the ministers and would therefore have to be amended by ministerial decision.

<sup>81</sup> TV5 Monde (2005), *XIX Conference*, op. cit., p. 9.

<sup>82</sup> Goss Gilroy Inc., op. cit.

programming quality. TV5 is a network of public partnerships, and quality must always come first in its objectives. Cost-effectiveness and quality are not at all incompatible objectives, but they often conflict when one takes precedence at the expense of the other. An increase in the channel's self-generated revenues is still an achievable objective but, as shown in the TV5 QC survey, viewer loyalty must first be ensured as the channel pursues its strategies.

### **4.3.3 TV5's governance and management structure**

TV5 QC's and TV5-M's current governance and management model (shown in Appendix A) allows for fulfillment of the TV5 Program's objectives and expected results. The desired spin-offs<sup>83</sup> are obtained more specifically as follows:

- ***In the medium term, by maintaining or increasing Canada's influence within TV5's new governance structure.*** Appropriate participation in TV5's decision-making bodies is expected, to ensure that the interests of the Government of Canada and its partners are taken into consideration.

#### **4.3.3.1 Features of the governance structure**

TV5 underwent a series of adjustments that led to the adoption of the TV5 Charter in September 2005.<sup>84</sup> The Charter's first two sections clearly state the main elements of the project's structure:

- A Conference of Ministers is made up of the ministers responsible from the funding governments, that is, the CFB, Canada, France, Quebec and Switzerland. The Conference is assisted in its work by meetings of senior public servants from the funding governments (section 1).
- Two operators, TV5-M S.A. (official name of TV5-M) and TV5 QC, are given responsibility as producers and broadcasters of TV5 signals (Section 2).<sup>85</sup>

Although section 3 of the Charter refers to advisory councils, the Conference of Ministers and both operators form the core of the TV5 organization. The operators differ from each other in three respects:

- ***Degree of autonomy to each other.*** TV5-M S.A. is a French registered corporation, while TV5 QC is a Canadian corporation. "As audiovisual communication companies, [the operators] are legally liable editorially. Accordingly, they have ultimate control over programming, which they define in compliance with the Charter. . . ." (Clause 2.1). In addition, there is an "operating agreement . . . between TV5-M and TV5 QC to clarify all relations between the two operators" (Clause 2.1). Both operators thus enjoy considerable management autonomy in relation to each other, enabling them to make decisions that are fully suited to their own circumstances.
- ***Relationship with the Conference of Ministers.*** Among other responsibilities, the Conference of Ministers defines TV5's overall approach, which both operators must

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<sup>83</sup> As defined in the evaluation's mandate.

<sup>84</sup> PCH (undated), *Overview of the TV5 Program*, Ottawa, Government of Canada.

<sup>85</sup> TV5 [Project], *op. cit.*



follow. However, the Conference endorses the strategic plan and sets the level of budget contributions for TV5-M but not TV5 QC. This particular feature obviously has to do with the source of government funds for the two operators. While the five governments represented on the Conference of Ministers fund TV5-M, only the governments of Canada and Quebec contribute to TV5 QC's budget. This is why its budget is not submitted to the Conference of Ministers.

- **Composition and role of the boards of directors.** “TV5-M’s Board of Directors is composed of partner public broadcasting organizations from TV5-M’s funding governments” (section 2.2) — that is, representatives of the governments serving on the Conference of Ministers. As for TV5 QC’s board, it is composed exclusively of Canadian voting members, including representatives from Radio-Canada, Télé-Québec, TFO, the APFTQ, the Government of Canada and the Government of Quebec (the latter two each having two delegates). However, it should be noted that “a TV5-M representative is invited as an observer” (section 2.3). To properly highlight TV5 QC’s particular position, the same section specifies that “TV5 QC informs senior officials and the Conference of Ministers Responsible for TV5 of its activities.” Note as well that the presence of government members is a feature specific to TV5 QC’s Board of Directors: governments are represented on TV5-M’s board only by public broadcasters,<sup>86</sup> and this is what leads PCH to turn to Canadian public broadcasters when it comes to increasing “exports of Canadian television products.” However, the structural difference between TV5 QC and TV5-M is not in itself a source of conflict. The relationship between TV5 QC and TV5-M is based on collaboration — as reflected in their operating agreement.<sup>87</sup>

#### **4.3.3.2 Quality of the governance structure**

In a field as complex as the audiovisual industry, an organization’s ability to succeed is directly linked to the quality of its management framework. In this industry, where partnerships abound — especially in the case of networks broadcast in several countries — shareholder and decision-making structures assume key importance. The more balanced these structures are, or the more they foster discussion and cooperation among stakeholders, the better are the organization’s chances of succeeding. In this respect, among the cases examined in the literature review, ARTE seems to offer the best example:

- The channel is owned equally by its two French and German partners, each with an equal number of representatives within the General Assembly (supreme decision-making body) and the Stewardship Committee (responsible for day-to-day management).
- The General Assembly gives the channel’s three main partners (Belgium, Poland, Austria) an advisory capacity.
- All decision-makers sitting at the table are senior executives from major organizations in the European audiovisual community, which very likely is evidence of their expertise.

However, ARTE’s management circumstances are quite different from those of TV5. France and Germany have more similar financial capabilities than France and Canada. Nonetheless, the

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<sup>86</sup> In accordance with the TV5 Charter.

<sup>87</sup> TV5-M and CTQC, *op. cit.*

decision-makers around the TV5-M and TV5 QC table are also key senior executives from the public-sector audiovisual community of the partner countries.

The existence of the two current operators of TV5 seems at first to be an anomaly. Formerly quite decentralized, the governance of TV5 significantly changed after the 2000–01 restructuring, which led to the creation of a worldwide network mainly administered by TV5-M. Of all the operators existing at the time, only TV5 QC survived (see below). Complex political reasons explaining this situation go well beyond simple considerations of cost-effectiveness. In theory, the current structure is likely to lead to overlapping, as well as communications and coordination problems between the operators. In practice, however, the parties' efforts and goodwill can reduce and even prevent adverse effects or risks related to maintaining a two-pronged model, in which one party has an infinitely more important place than the other. This imbalance is reduced still more by the fact that each operator has its own board of directors which, as stated, gives it managerial autonomy. In relation to each other, TV5-M and TV5 QC are tied only by obligations in the TV5 Charter, which specifies the approaches and roles of the various decision-making bodies, without imposing overly binding administrative rules.

Among all of the informants consulted for this evaluation, 59% of key stakeholders (20 of 34) find the composition of the boards of directors to be appropriate for both TV5-M and TV5 QC. Four experts also fully agree. In their opinion, it is good that TV5's overall approaches are determined by professionals in the television field because these people are best qualified to ensure the desired success of the project, in line with its mandate and objectives.

The presence of government representatives on TV5 QC's Board of Directors does not bother key stakeholders in the slightest. On the contrary, the presence and involvement of these spokespersons is highly valued. There is excellent cooperation between the governments of Canada and Quebec because their objectives are sufficiently similar to enable them to work together effectively on the TV5 file. Key stakeholders especially recognize the federal government's role in defending the interests of Francophone minorities outside Quebec.

All stakeholders agree that TV5's governance is much simpler today than when private-sector players sat on TV5 QC's Board of Directors. The reduced number of players around the table is widely seen as a notable improvement in the governance system. In addition, TV5 QC's CEO now is appointed by the board rather than the federal and Quebec governments, without political interference. This situation encourages the appointment of individuals having all the qualifications required for the position, especially familiarity with the television field.

However, 26% of key stakeholders (9 of 34) clearly raised the issue of the appearance, and even the existence, of a conflict of interest within TV5 QC's Board of Directors — an issue already raised in the 2002–03 internal audit report.<sup>88</sup>

- Radio-Canada and Télé-Québec alternate in supplying the Chair of the Board. This arrangement is seen as creating a conflict of interest for these networks on issues such as programming and the use of advertising, as well as TV5 QC's mission, especially in connection with decisions about the programming of drama and films. Télé-Québec and Radio-Canada could perceive TV5 QC as a competitor if the operator began to broadcast more of such programs, which are already strongly represented in their own schedules.

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<sup>88</sup> PCH (2003), *op. cit.*, p. 8.

Some stakeholders say that, when certain decisions are made, representatives of the two Canadian public-sector networks could face the dilemma of having to choose between the interests of TV5 and those of the network they represent.

- According to the stakeholders, representatives of the public-sector networks should serve on TV5 QC's Board of Directors as decision-makers for this channel. While doing so, they should completely set aside their role of representing Radio-Canada or Télé-Québec.

This interpretation may come from a misreading of the situation. However, given the number of key stakeholders expressing the opinion, the evaluation team should be on the lookout for solutions that the Board could unanimously accept to dispel the perception. The suggestion most often heard (in seven cases) would involve appointing an audiovisual industry "sage" who would be committed to TV5 QC's success, without the distraction of upholding personal interests. However, the team repeats that most key stakeholders are not at all concerned in practice by the fact that the Board of Directors is chaired by a representative of either Radio-Canada or Télé-Québec because the professionalism of the persons concerned is widely acknowledged by the other board members. Their fears have more to do with issues of ethics or operating procedures. The fact remains that it would be better for this situation to be clarified so that the legitimacy of the board's leadership is not undermined by the perception of an apparent conflict of interest.

#### *4.3.3.3 Canada's representation in the governance structure*

TV5's current structure results from a reorganization decided by the Conference of Ministers in 2000 and made official in the Charter. Among measures then taken, the main one was to transfer from TV5 QC to TV5-M operational responsibility for the signals of TV5 Latin America and Caribbean, and TV5 United States. These structural changes significantly modified TV5 QC's role, a change reflected in part by name changes:

- Before the reorganization a separate organization, the Quebec-Canada Television Consortium (CTQC), managed TV5 QC as well as TV5 United States and TV5 Latin America and Caribbean.
- In TV5, at least in terms of structure, the CTQC appeared to be both stakeholder and partner responsible for managing the signals for the Americas, while TV5-M was responsible for signals for Europe, including France, the CFB and Switzerland, as well as for Africa, Asia, and the Near and Middle East.
- Having relinquished the signals for TV5 United States and TV5 Latin America and Caribbean, TV5 QC is now limited to one territory, the only territory covered by TV5 having an autonomous operator.

It will be recalled that the other territories do not have an autonomous operator and that all functions currently performed by TV5 QC could theoretically be handled by TV5-M.<sup>89</sup> Suggested by certain key stakeholders, the possibility of merging the two operators would at the very least

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<sup>89</sup> In such a scenario, the signal's broadcast would be managed by TV5-M, Canadian programs would be chosen and forwarded to TV5-M jointly by Radio-Canada and Télé-Québec (among others), and assistance for producers would come from the Cultural Industries Development Fund as well as the other sources named in section 4.2.3.2 concerning the federal government's contribution to Canadian audiovisual production .

have the benefit of eliminating some of TV5 QC's operating expenses. However, other informants argue that Canada would lose in the exchange, particularly in view of the following points:

- TV5 QC costs the federal government very little for a totally Canadian channel, with benefits given to Canadian channels broadcasting in Canada.
- TV5 QC is funded mainly by subscription revenues, which would be lost if TV5-M took over responsibility for broadcasting.
- It would be difficult to keep the same programming approach designed specifically for Canada's population — with 15% of airtime reserved for Canadian programs — if TV5-M was the sole decision-maker. This would adversely affect small Francophone producers, especially outside Quebec.
- Canada's participation in TV5 is based on a Quebec-Canada partnership considered to be a model.

In anticipation of the reorganization, the 2002 evaluation recommended, "If decision-making is centralized for TV5, the federal government should make sure that Canada is represented in the new structure in order to protect its interests." PCH replied to this recommendation in its submission to Treasury Board: "Pursuant to the agreement announced on June 22, 2000, on simplifying TV5's management structures, the Government of Canada continues to participate in all of TV5's policy bodies; the SRC serves on TV5-M's Board of Directors, and TV5 QC is now managed exclusively by Canadian interests."<sup>90</sup> This point is confirmed by the document review.

Furthermore, Canada has been given a major, unexpected voice in TV5-M's management since a Canadian was appointed to the position of assistant director general responsible for programming. The appointment helps to ensure that Canada has significant influence on the channel's approach. However, the managers' terms of office extend only for a few years, and this one appointment cannot be expected to ensure for Canada a longer-term place in the internal governance of TV5-M.

In the light of this information from the document review, it can be concluded that Canada is well represented on TV5-M's decision-making bodies, mainly via its board representative, that is, the SRC. As for TV5 QC, the fact that it is Canadian and managed by Canadian interests enables it to offer Canadians a fresh perspective on the international Francophonie, through programming that includes a large share of European programs unavailable on other Canadian French-language channels (such as TFO or Radio-Canada).

#### ***4.3.3.4 Quality of the management model***

Generally speaking, the evaluation team obtained little information on the quality of management of TV5's two operators, especially TV5-M. However, the interviews brought out the following points:

- Many informants (76% of key stakeholders as well as the experts) have confidence in both operators' current management system.

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<sup>90</sup> PCH (2004), *Treasury Board Submission — Creation of a Named Grant for TV5 Monde*, Ottawa: Government of Canada, September 2, 2004.

- Concerning TV5 QC, stakeholders view the channel's management positively. However, they mention challenges that they think deserve special attention in the future. For example, some think that TV5-M's senior management, largely dominated by France, would be inclined to negotiate more bilaterally than multilaterally with the other funding partners (Switzerland, the CFB and Canada), thereby increasing France's decision-making clout in relation to the other funding countries.<sup>91</sup>
- Some 15 key stakeholders emphasize the excellence of TV5 QC's administrative practices, especially since the 2001–02 restructuring. Tending to support this opinion is the fact that the operator succeeded in maintaining its operations despite a significant cut in the federal government's contribution — from \$10.3 million to \$7.2 million between 2001 and 2006 for the entire TV5 project.
- Finally, the issue of collaboration between TV5-M and TV5 QC was raised several times (by eight stakeholders). Communications problems sometimes arise because TV5 QC has no delegated observer on the decision-making bodies of TV5-M, which does have its own observer at TV5 QC's board meetings. The presence of a TV5 QC representative on TV5-M's Board of Directors would improve communications, especially when it comes to discussing TV5-M's approaches. Five stakeholders said that both operators would benefit from deepening their partnership and cooperating more closely with networks that supply them with content (e.g., TF1, F2, TSR, RTBF, SRC, Télé-Québec, etc.) in order to undertake more joint projects or to use the Internet better, for the greater benefit of all partners. Some maintain that easily surmountable technical constraints sometimes lead TV5-M to lack flexibility with regard to the Canadian programming that is suggested to it. Several key stakeholders also mention that closer cooperation would resolve certain problems, such as TV5 QC's use of educational tools already tested on TV5-M. In general, TV5's continued existence would be assured by stronger ties between the operators and closer partnerships aimed at reinforcing the channels' presence in the audiovisual landscape, while also promoting the unique nature of each.

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<sup>91</sup> The evaluation team was unable to find other sources having this perception.

***Highlights***

- Changes in the industry, especially technological changes, pose major challenges for which TV5 QC is making proper preparations. In the short term, the channel is not threatened.
- The prospects for diversifying funding sources in the short term are limited, whether through new partnerships, advertising or increased private-sector involvement. However, TV5 QC's and TV5-M's diversification efforts make sense at a time when the partner governments are under pressure to cut spending. A more in-depth study on diversification of funding for TV5 QC, and especially the potential of advertising, would enable the channel to evaluate the risks and opportunities it faces in its quest for revenues.
- The partner governments will continue to play a leading role in providing both funding and guidance for the two operators.
- Management of the TV5 Program appears to be highly efficient.
- The governance structure of both operators is functional and the Government of Canada is appropriately represented within that structure.
- The Quebec-Canada partnership is considered highly effective because both parties have similar interests in TV5 and invest their own expertise in its development.
- Many stakeholders see a potential conflict of interest within the TV5 QC Board of Directors since the SRC and Télé-Québec representatives "wear two hats" on the board. This perception may arise from a misinterpretation of the way the board works. It should nonetheless be addressed.
- It is essential to address cooperation issues between TV5 QC, TV5-M and their partners to increase TV5's overall effectiveness. The two operators must avoid working independently since they have very similar interests and objectives and play complementary roles in presenting Francophone culture. Exchanging strategic information is central to their cooperation. To facilitate the exchange of financial information and the two operators' administrative management, it would be useful to consider better harmonizing their accounting practices.

## 5. General conclusion

Through a series of complementary lines of investigation, this summative evaluation has made it possible to gather, review and analyze very extensive information on the TV5 Program. Having completed the process, the evaluation team is in a position to present a series of informed observations about the relevance and spin-offs of the Government of Canada's participation in TV5, and about TV5-M's and TV5 QC's models for funding, management and governance. The observations take into account the project's technical, regulatory and commercial environment, currently in a state of upheaval.

### *Relevance*

First of all it can be concluded that the federal contribution to TV5 meets the Government of Canada's objectives for its involvement in the Francophonie, and will continue to meet those objectives in the short term. The TV5 Program's activities are clearly compatible with the Government of Canada's priorities and PCH's strategic objectives. More specifically, the findings of the lines of investigation decisively show that Canada's participation in TV5 strengthens the country's influence in the world because of the Canadian content broadcast on TV5-M. Although this content was limited at first, it has been growing since 2004, and TV5-M's worldwide range supports the conclusion that the channel is an excellent vehicle for the Canadian Francophonie. Likewise, TV5 QC is an effective medium for exposing Canadians to the diverse world of both the international and Canada-wide Francophonie; this makes the channel unique and entirely relevant in the Canadian television environment of today. Canadians can thus enjoy a variety of cultural experiences and share them with each other and the world, via the mirror of TV5. For the moment there is no reason to be concerned about the channel's relevance, despite rapidly emerging changes in the project's technical, regulatory and commercial environment. TV5 QC is very aware of the new context, and recognizes the extent and complexity of the challenges it faces. The operator is already taking measures to continue offering high-quality services, meeting its viewers' needs and the expectations of other stakeholders. TV5-M is adopting a similar strategy and positioning itself to maintain its relevance and simultaneously meet the needs of Francophone populations in developing and developed countries, Francophone expatriates, and learners of French throughout the world.

### *Success and impact*

The main finding to be drawn from Canada's participation in TV5-M is that this is an excellent showcase for broadcasting Canadian content, especially because of a considerable increase in the channel's range. Although no formal target has been set as yet, an increase in the Canadian presence on TV5-M would be desirable. However, Canada already has a strong position: 8.5% of airtime is given to Canadian productions, in return for a financial contribution representing less than 5% of TV5-M's total budget. While it is important to reflect on the place Canada wants to hold on this channel, we can nevertheless state that federal participation in the Program helps to raise the country's international profile.

Canada's contribution to the TV5 Program also has an impact on the international Francophonie's profile. Through its programming, innovations and cooperation with the TV5 network, Canada enriches the international Francophonie via what is seen as one of the most effective operating agencies within the Organisation internationale de la Francophonie. In

exchange for modest funding, Canada is positioning itself alongside France, the CFB and Switzerland in raising the international Francophonie's profile worldwide, while expressing a thoroughly Canadian viewpoint on current events, culture, art and more.

The Government of Canada remains interested in spin-offs for the Canadian television production sector, job creation and the promotion of Canadian content abroad. Evaluation findings confirm that the federal contribution generates tangible spin-offs for producers, whether through the Program's contribution to TV5 QC or the special projects envelope administered by this operator. Producers say that without this assistance, many specific high-quality projects dealing with issues of the Francophonie would not have come into being. Apart from their cultural value, the broadcasting of such productions on TV5 QC generates revenues for producers and leads to positive effects through the consequent increase in visibility. The results achieved may not always be up to producers' expectations. Over the last five years, TV5 QC's total budget was in the range of \$12 to \$15 million, 40% of which was to be invested each year in purchasing original Canadian programs.<sup>92</sup> In addition, some \$1.7 million had to be invested to clear rights for TV5-M. Despite limited resources, significant efforts have been made to stimulate Canadian production. Through its funding for the TV5 Program, Canada unquestionably supports these efforts.

As for TV5 QC, the evaluation highlights the major role played by the channel as a tool for promoting the Francophonie's cultural diversity both in Canada and internationally. The signal it broadcasts achieves satisfactory results in terms of range and market shares, and TV5 QC's Web site is growing in popularity. All these indicators are keeping their position or rising, despite fierce competition in the Canadian television market. In these circumstances, the federal contribution to the TV5 Program fulfills the objective of fostering Canadians' access to a window on the Francophonie's cultural diversity. TV5 QC shows openness and pays very particular attention to viewer needs in building on the most appropriate innovations, as allowed by constraints on the channel — particularly the concern to keep its place in cable operators' basic packages in the digital age, when the industry is moving toward deregulation.

### *Cost-effectiveness / alternatives*

The evaluation shows that, with operations appearing to be efficient at first glance, TV5 QC and TV5-M are actively striving to diversify their revenue streams despite the many constraints hampering their efforts. The examination of best funding models and strategies is well under way; TV5 QC's recent use of advertising is a good example, though so far this measure is not generating significant results. The analysis of options for diversifying funding via different lines of investigation underscores the many barriers presented by the divergent interests confronting each other on certain issues. For example, an increased use of advertising by TV5 QC to provide more self-generated revenues could displease viewers, who like the channel because of its commercial-free content. Funding by new public-sector players — an option suggested by certain stakeholders — could complicate the channel's management and strategic approach. Because of TV5's particular mission and its content type, there is little room for public-private partnerships. In the short term, this issue causes little uncertainty since TV5-M and TV5 QC find themselves at the centre of visibility strategies of their partner governments, from which they receive major support despite a funding decrease for TV5 QC in recent years. However, pressures to rationalize

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<sup>92</sup> As specified in TV5 QC's operating licence issued by the CRTC.



public funding are making themselves felt; this is why it is important for TV5 to pursue its attempts to diversify funding.

Finally, Canada's interests seem to be appropriately represented within the TV5 governance structure, given the country's participation in TV5-M's Board of Directors and its presence in certain key positions. As for TV5 QC, it is directed and managed exclusively by Canadian interests. Consequently, it is reasonable to say that Canada has maintained its influence within the structure since the 2002 summative evaluation. In fact, the increase in Canadian content on TV5-M and TV5 QC's greater involvement through the special projects envelope give the impression that this influence has even grown. Nevertheless, there is still room for certain improvements in management and governance, especially in the area of communications between TV5-M and TV5 QC as well as their partners, and in clarifying relations that support the perception of a conflict of interest between partner decision-makers (see Section 4.3.3.2).

## 6. Challenges and Risks

Five years have passed since the last summative evaluation of Canada's participation in TV5. This period saw the emergence of many new challenges and issues having to do with TV5 activities on the Canadian and international television scene. The following analysis aims to highlight the main challenges facing TV5 and to offer some avenues for thought about its future in an industry now in upheaval — especially the question of spin-offs for the Francophonie, Canadians, the Government of Canada and the Canadian audiovisual industry as a whole.

### *New technologies*

The emergence and spread of new technologies represent challenges for the distribution of TV5 QC and TV5-M, which must adapt to their different markets. In Europe, the development of digital terrestrial television must be taken into account. This new method of broadcasting, in which TV5-M is not involved, could possibly marginalize satellite and cable broadcasting, thus causing losses of viewers and advertising revenues for TV5-M. The situation makes it complicated for TV5 QC and TV5-M to promote their content to commercial distributors, and this is why they need to expand their non-Francophone audience and ensure that it is sufficiently homogeneous. Formerly, keeping or adding the TV5 signal to distribution networks was justified mostly because there was no charge for broadcasting it. Today, “free” is no longer enough; potential viewers must be turned into actual viewers. Henceforth tools such as subtitling are important in the market development strategy.

Other challenges are looming on the horizon for TV5-M and TV5 QC, such as the “triple play revolution” (convergence of television, telephony and high-speed Internet). This poses obstacles for cable networks, and makes access to television channels more difficult and expensive. Furthermore, the emergence of high definition television, especially in the United States, Japan and Canada, will eventually force channels either to make the necessary investments or accept the risk of being marginalized if they do not adopt this standard. These challenges will require TV5-M and TV5 QC to make strategic choices that could prove to be very costly. However, both operators have considerably increased their presence in all digital packages, despite a certain lag in Europe. TV5-M's transition to digital became operational with the satellite redeployment initiated in 2002; this considerably increased the TV5-M signal's broadcast in digital mode, instead of the traditional analog broadcasting. TV5 QC has followed suit in moving to digital. Its activity report for 2004–05 notes efficiency improvements in developing the strategy for implementing this technology. TV5 QC's greatest challenge is to keep its strategic place in the basic package offered by cable and satellite distributors (or direct broadcasting undertakings once this entirely digital sector is deregulated in 2010).

Other new broadcasting and viewing trends in television include video on demand, Webcasting, TV on cell phone, etc. These technologies will not endanger Canadian channels provided they adapt intelligently by making use of the new tools to promote themselves and, if possible, adjust their funding sources to increase self-generated revenues. TV5-M and TV5 QC must secure the rights they hold to broadcast programs, which come largely from partner channels. Both operators have set up Internet sites that now play a major complementary role to television itself, serving as feeds to viewers and as promotional devices.

The TV5 QC survey shows that 78% of respondents do not yet watch television on the Internet. Furthermore, although 43% would perhaps like to receive programs through this medium, 26% would not and 31% are indifferent. In addition, only 9% of respondents would like to receive programs via cellphone. Such data leads to the conclusion that TV5 QC must avoid the pitfall of attempting to position itself everywhere immediately, without knowing its viewers' real needs. However, it should be recalled that these needs can change quickly. The data also confirms the immediate importance to the channel of the rise in new platforms of which it does not yet make much use and which right now would remain underused if they were widely available. Still, TV5 will face the challenge of being able to quickly offer Internet users the opportunity of watching certain programs on the Web, because demand for this type of product is growing. In fact, television viewers increasingly insist on having access to information whenever they choose, without having to wait for their programs to be broadcast on the small screen. The Internet appears to be an answer to this need in the short and medium term, until the video on demand option is explored more seriously.

### ***France 24***

A significant development in the current audiovisual context was the December 6, 2006, launch of France 24, the new French international news channel. Despite France's assurances that France 24 will be a partner, not a competitor, representatives of the other funding governments (the CFB, Switzerland, Canada and Quebec) expressed fears about the impact of this new player on TV5. Although it is too early to reach a verdict on the subject, most of the stakeholders interviewed think there is nothing to fear from France 24 in the short term because this new player complements TV5. A genuine analysis of France 24's impact on TV5's market shares will be required, but cannot be undertaken before a few years have passed. Already, however, it is known that France 24 is above all meant to be French (not international), that it broadcasts in several languages (not only in French) and that its content is mainly news and special reports; this leaves to TV5 the role of a general-interest channel accessible to all audiences. However, it is important to carefully monitor France 24's development, with the aim of making the two channels more complementary and thus preventing an overlap of content. It should be recalled that TV5 already presents many news bulletins in its programming, and that the channel's current audience greatly appreciates this type of program both in Canada and internationally. This could lead to competition with France 24.

### ***Relevance and viability***

Besides the constantly changing technological framework, with which both operators must live, several risks arise from TV5's positioning strategies and its money-making efforts. For example, advertising could play an increasingly major role as a revenue stream, but this possibility must be seen in perspective alongside the risks of losing a segment of viewers who want commercial-free programming ("My oxygen!" says one TV5 QC respondent). These risks are a reminder that in the audiovisual and other sectors, relevance and viability do not necessarily go hand in hand. In this report, the evaluation team has shown that the Government of Canada's contribution to TV5 is relevant since the government's objectives for its participation are being fulfilled. However, this situation applies only to the short term, and current business conditions make any forecasting beyond a few years uncertain: the current television environment is too volatile to support assumptions about the TV5 channel's relevance, spin-offs, available funding sources, and best forms of governance and management in the long term. This observation is based on the fact that

it is impossible to accurately predict what the environment in which TV5 QC must operate will look like in the more distant future. At the very most, the experts venture to predict potential changes within the next five years; beyond that, any projection is described as being risky. For TV5 QC and the TV5 Program, the experts simply advise to remain on the lookout for any new broadcasting or distribution technology, any development on deregulation and any change in viewer needs.

### ***Ongoing search for balance***

Another risk to be considered is the temptation for TV5 to let itself be drawn too close to either of two poles, two approaches shaping its environment: business pragmatism, giving top importance to market shares; and an idealistic way of thinking, giving top importance to concern for quality. For example, TV5 QC's decision-makers must please everyone at the same time: an audience scattered around an immense world where circumstances and needs vary with time zone; industry partners defending their own interests; and funding governments trying to achieve certain results. At the same time the decision-makers must respect TV5's identity as defined in the Charter, as they interpret the mandate entrusted to them, and in accordance with their own convictions about what is fair and appropriate in the circumstances. The force of attraction exerted by each of the two poles generates a whole series of questions:

- To what extent should advertising be used?
- How far can the channel go to attract new viewers?
- Should young people form a new niche for TV5?
- Must certain high-quality programs, referred to as more "serious," be dropped in favour of popular programs to attract more viewers?
- Should the share of Canadian programs be increased in the programming? If so, to what proportion?
- In the programming, how much importance must be given to respecting TV5 QC's mission relating to Francophone minorities outside Quebec or outside Montréal?

For all of these difficult questions and many others, no doubt the best response is to maintain a balance. The balance will always be precarious, and decision-makers must always discuss it openly with all stakeholders. Obligated to guide the destiny of a general-interest channel that cannot free itself of the demands of a specialty channel, they must incessantly devote efforts and resources to the endless but essential search for compromise.

### ***Industry consolidation***

Finally, both operators must keep a close watch on the consolidation taking place in the broadcasting sector. The bigger players will find it easier than smaller ones to negotiate with cable operators. If TV5 QC does not manage to win a place in cable operators' basic digital packages under the regulations resulting from section 9(1) (h) of the *Broadcasting Act*, it will be hard for the channel to negotiate with them in future. In a market that is increasingly

consolidated, particularly vertically, channels operating alone find themselves at a disadvantage. It is thus in the interest of those sharing common features to develop cooperative links with each other, and then with producers and distributors. This will help them withstand the danger of marginalization, which could be fatal to any channel having a small audience but presenting original, specialty content meeting specific needs. In short, TV5 QC and TV5-M should begin exploring joint strategies with a view to positioning themselves well vis-à-vis their competitors.

## 7. Recommendations and Management Responses

**Recommendation 1** — *The evaluation has demonstrated the relevance of the federal government's involvement in TV5 to date. However, given the future technological issues and challenges TV5 is likely to face, the federal government should support TV5 QC and TV5-M in their reflections with the aim of repositioning the TV5 network. The government should also closely monitor changes to the situation of TV5 to ensure that its involvement continues to remain relevant in the future.*

### **Management Response:**

In return for an investment (\$7.2 million per year), the TV5 Program yields tangible results. It respects and effectively supports Government of Canada priorities and PCH strategic objectives, particularly with regard to Canada's international presence and the opportunity to provide Canadians with a fresh perspective on the international Francophonie.

However, the significant changes taking shape in the Canadian television industry and the resulting major challenges warrant a joint approach by all parties. The Canadian Radio-television and Telecommunications Commission, PCH and other stakeholders have already begun to study the future of the broadcasting system in Canada and internationally in light of the technological and commercial issues looming on the horizon. For TV5 QC and TV5-M, the expanding array of distribution platforms and new technologies present both challenges and opportunities. The two operators must certainly focus heavily on positioning themselves effectively vis-à-vis their competitors while continuing to deliver a high-quality product. The inevitable shift to digital and the high cost of producing high-definition programming must be evaluated with regard to viewers' expectations. The Program should continue to support the approach taken by TV5 QC and TV5-M, specifically by considering what actions should be taken to address the major issues to arise in the future, including potential CRTC deregulation with respect to the *Broadcasting Distribution Regulations*; this could have an impact on channel funding that for the most part (over 60%) currently comes from subscription fees.<sup>93</sup>

*Implementation schedule:* Ongoing with specific projects.

**Recommendation 2** — *Encourage the efforts of both entities to diversify their sources of revenue, and particularly to reduce their dependence on government assistance.*

The search for new sources of revenue should, however, take into account the inherent market constraints; these may limit the impact of proposed solutions, particularly the use of broadcast advertising. Diversification options should be considered and weighed in light of a cost-benefit analysis. TV5 QC cannot expect to significantly transform its funding structure in the short or medium term by tapping new sources of revenue, whether advertising, subtitling, delivering new products via the Internet or finding new partners. However, a more extensive study of the potential for advertising on TV5 QC should be conducted, considering the impact that advertising

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<sup>93</sup> Such deregulation could force TV5 Québec Canada to raise its subscription fees to cover the revenue shortfall, higher production costs and broadcasting rights, with the obvious risk of losing a significant share of its current subscribers. The combined impact of the fall in revenues and loss of market share to other providers and platforms could jeopardize the very existence of TV5.

may have on the audience. Despite the difficulties associated with diversifying funding sources, the Program should encourage TV5 QC to explore all possible ways of diversifying, provided that the quality of the channel is not compromised. If diversification fails to significantly increase TV5 QC revenues, the Program and the channel's managers should consider the possibility of raising subscription fees in Canada when the channel's licence comes up for renewal with the CRTC.

**Management Response:** Accepted, action under way.

PCH will ask TV5 QC to prepare a report that analyzes other possible sources of revenue, to estimate the cost of implementation versus the desired financial impact, and to make recommendations on what measures would be required to access these new revenue sources. If some of the measures proposed in the report require amendments to TV5 QC's broadcasting licence, this issue may be reviewed by the Canadian Radio-television and Telecommunications Commission when the licence is up for renewal in August 2009.

Both operators have already taken action following the 2001 evaluation. For example, since 2005, TV5 QC has been broadcasting advertising, while TV5-M has been exploring new markets with a view to expanding its audiences through new distribution channels and services. However, TV5 QC's advertising revenues account for only a small portion of its budget, and they are unlikely to increase considerably in the coming years. TV5 QC and TV5-M are therefore continuing to explore all possible opportunities for diversifying their revenues, particularly through the utilization of new technologies and an expanded array of platforms.

*Implementation schedule:* TV5 QC's report is to be submitted to Canadian Heritage in August 2007.

**Recommendation 3** — *Set specific targets for program objectives.*

As things now stand, it is difficult to evaluate the Program's performance in terms of quantifiable indicators. The Program needs to review the percentage of airtime devoted to Canadian programming on TV5-M and TV5 QC, the number of Canadian programs, the positioning of these broadcasts in the TV5-M programming schedule, the nature and variety of the programs broadcast, the number of special projects to be supported, and the percentage of Canadian participation in the TV5-M and TV5 QC budget. The review will enable the Program to set specific and realistic targets for each objective. The Program should be able to set such targets for the short, medium and long term, taking into account the situation in the audiovisual industry.

**Management Response:** Accepted, action under way.

The performance reports of both operators already provide some of this information on a yearly basis (potential reception, ratings, number and percentage of Canadian programs on TV5 QC and TV5-M).

At the same time, in response to the evaluation comments, the Program has developed new performance indicators and fine-tuned others in its *Results-based Management and Accountability Framework (RMAF)* and *Risk-based Audit Framework (RBAF)*, which as been reviewed in Fall/Winter 2007-2008.

*Implementation schedule:* An RMAF/RBAF was finalized in March 2008. Financial data and performance statistics from the operators will be collected regularly, and will be made available to the Program on an annual basis.

***Recommendation 4 — Promote communication and collaboration between TV5 QC and TV5-M.***

TV5-M is a key player in Canada's strategy of participation in the international Francophonie and its strategy of promoting its own television productions. More sustained collaboration between TV5-M and TV5 QC would make it easier to solve challenges, such as the difficulties involved in producing reports given the operators' differing fiscal years. The two operators have much to gain from working together as efficiently as possible to make TV5 even more efficient. The Program could support joint initiatives between the operators focused on broadcast projects or on content-sharing between the various platforms that will be explored further in the coming years. TV5 QC and TV5-M might be encouraged to share strategic information on their performance objectives, the results achieved by their initiatives and best practices in management, possibly through a joint task force. It might be useful for TV5-M and TV5 QC to harmonize their accounting practices and have their fiscal years align; this would facilitate transactions between the two operators, as well as their administration and the evaluation of their performance.

**Management Response:** Accepted, action under way.

The Program encourages both operators, regularly and during senior officials' meetings, to explore partnerships aimed at sharing knowledge and expertise among themselves, and working toward achieving common objectives.

The Program will restate in writing to both operators its desire to see them working together on common issues, including production and distribution. The Program will report on arrangements favouring this approach, potentially including funding of special projects.

*Implementation schedule:* Over the next five years and ongoing, depending on the proposed projects.

***Recommendation 5 — Review the positioning and the type of Canadian programs in the TV5-M schedule.***

Although the percentage of Canadian programs on TV5-M has risen in recent years, which does not mean that these programs are more popular with viewers. In fact, survey results clearly indicate that TV5-M viewers are not very familiar with Canadian programs. It would be advisable to review the positioning and type of these broadcasts in the schedule in the interest of maximizing their visibility. This would involve strengthening the role of the Programs Committee (which is responsible for coordinating program acquisitions and clearing rights for TV5-M), enabling it to make choices that meet the interests of Canada, the two channels and their audiences. Canadian programs would then have better chances of receiving advantageous time slots, which would promote the visibility of Canadian content internationally.

**Management Response:** Accepted, action pending.



The positioning and type of Canadian programs broadcast by TV5-M are of great importance to the Program. In this context and in response to some of the observations made by the Program and the evaluation, PCH will commission a study to conduct an in-depth analysis of the positioning, percentage and type of Canadian programs in TV5-M's programming schedule for a selected period. This information can be used to determine whether the positioning of Canadian programs broadcast by TV5-M is appropriate for each region covered by the channel.

The findings of the study will be used to determine the relevance of practical recommendations to TV5-M. These issues are just as relevant for the other funding partners. Quebec and Switzerland, in cooperation with all the other partner governments of TV5-M, are planning to prepare a discussion paper dealing with the scheduling of all partners' programs on TV5-M.

*Implementation schedule:* The study will start in 2007–08 and will be submitted to PCH during the 2008–09 fiscal year.

***Recommendation 6*** — *Examine the relevance and feasibility of efforts to interest and attract younger audiences.*

TV5 QC's management hopes to attract more young people with its programming, an approach that was suggested in the 2002 summative evaluation of TV5. This is an option worth exploring, since it would help expand the channel's audience while helping the Government of Canada achieve its objectives of making the Francophonie more widely known by raising awareness of the international and Canadian Francophonie in this segment of the population. This could perhaps serve to counteract the influence of the U.S. networks. Care must be taken to adopt the right strategy, since current TV5 QC viewers are well-informed but appear to have little interest in programming changes to attract young people. Greater use of the Internet would be a useful way of attracting this audience since increasing numbers of young people are choosing the Internet over more traditional media, including viewing television programs. Young learners of French especially could benefit from such a platform. TV5 QC, in conjunction with the Program, should consider whether it would be useful and possible to adopt innovative ways to attract a youth audience without alienating its traditional and increasingly loyal viewers.

**Management Response:** Accepted.

The Department accepts this recommendation. Although it is more directed at the two operators, it calls for the Program to support them in their reflections and efforts to meet this objective. The decision to develop younger audiences is up to the operators' respective management teams and boards of directors. TV5 QC and TV5-M have already taken measures regarding this recommendation, such as adjusting their programming schedule to attract younger viewers and developing their Internet site to provide more interactive content of interest to a younger audience. Furthermore, TV5 QC would like to create a "mentoring" program to encourage a new generation of young producers from Francophone minority communities. The Department will, as far as possible, support projects that fall under this recommendation.

The Program's objective is to ensure that TV5 QC retains 1.2% of Canadian viewers despite growing competition from other broadcasters. The Program's objective for TV5-M is that it retain or increase its audience (171 million or more) and that, on average, 7% of its aired broadcasts be Canadian programs.

From time to time, the Program will inquire about the success of TV5 QC and TV5-M management efforts to attract younger audiences.

***Recommendation 7*** — *Prepare a list of criteria to promote transparency in the selection of special projects to be funded.*

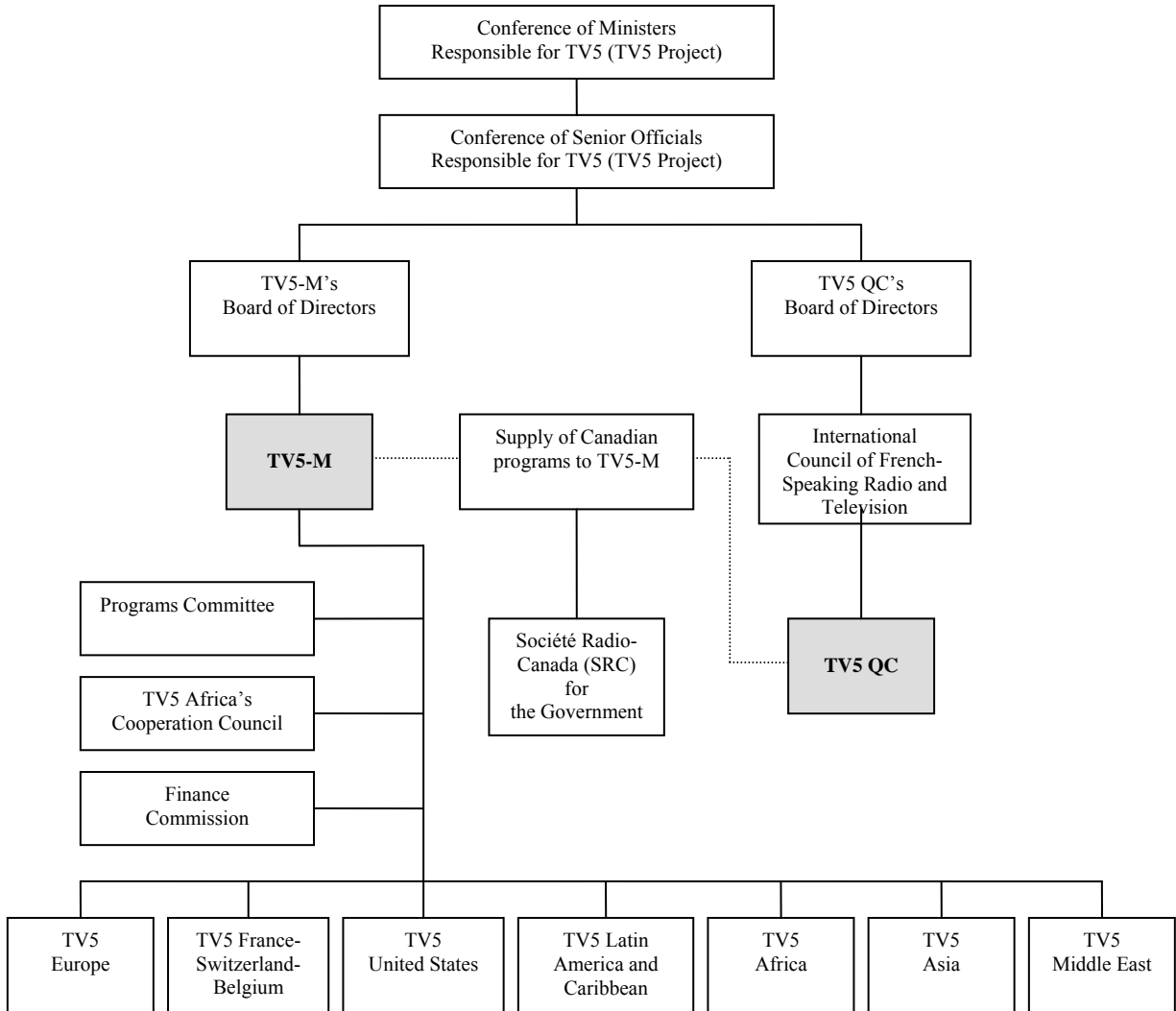
The special projects envelope should be used more judiciously. At present, it is difficult to assess its impact accurately, given the excessive diversity and disparity of projects. There is also little transparency in the project selection rules. In collaboration with the TV5 program, TV5 QC should prepare a list of selection criteria for special projects to be funded. This would enable producers to plan their initiatives more effectively in accordance with Program expectations, thus making the process more systematic and transparent. Impact evaluation would also be easier. Central to the choice of selection criteria for special projects should be support for Francophone producers outside Quebec and compliance with Canadian objectives for participation in the Program.

**Management Response:** Accepted, action pending.

PCH, in cooperation with TV5 QC, will develop a list of parameters to guide the selection of special projects to be produced by TV5 QC. This list will reflect the specific objectives of the operator and the broader objectives of the Government of Canada regarding TV5. It will also provide for more transparent selection of projects.

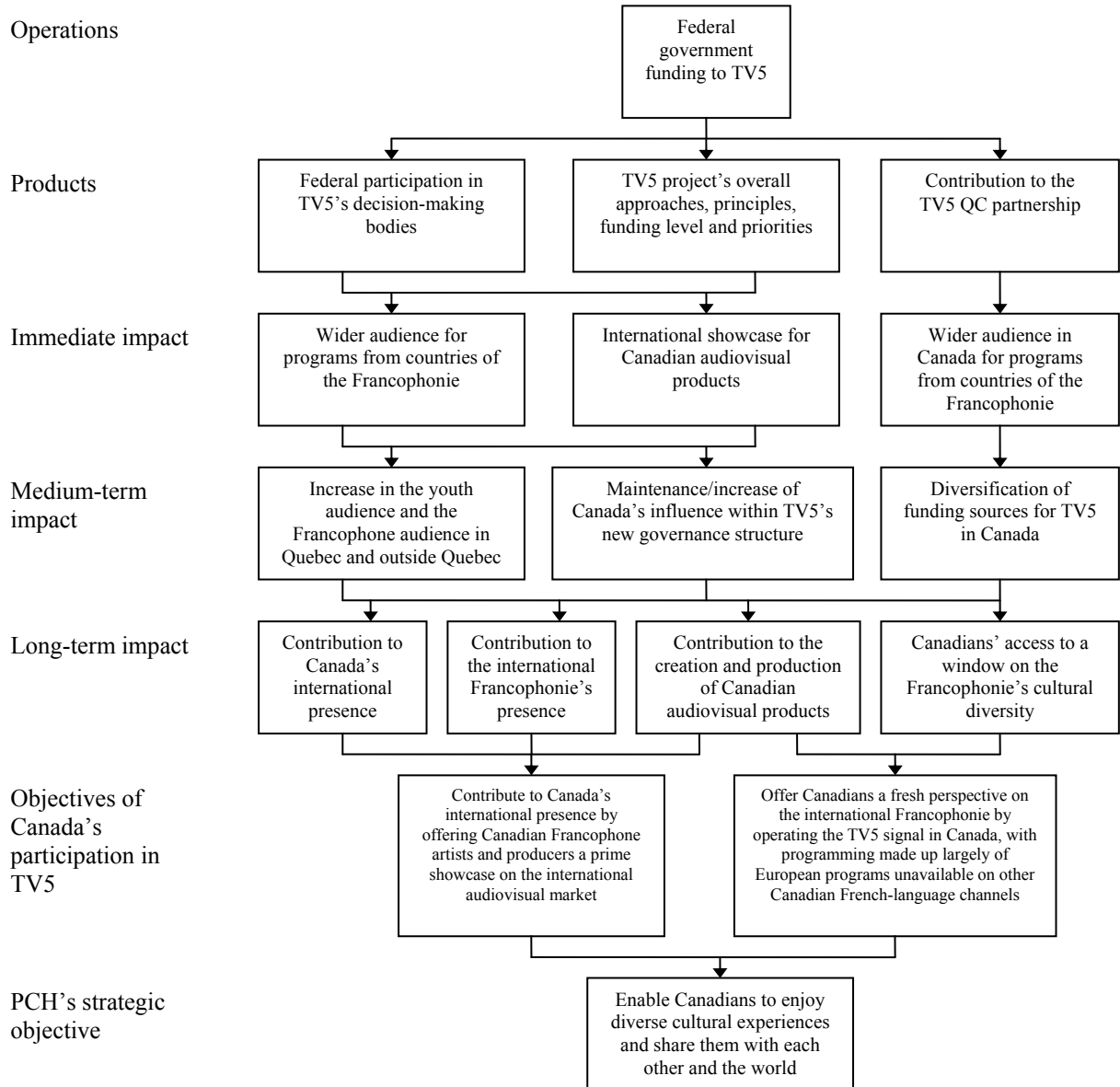
*Implementation schedule:* Fall 2007.

# Appendix A — TV5’s Governance Structure



Source: Adapted from PCH (2006), *Summative Evaluation of TV5 — Framework*, Corporate Review Branch, Evaluation Services, June 2006.

## Appendix B — Program Logic Model



Source: Adapted from PCH (2006), *Summative Evaluation of TV5 — Framework*, Corporate Review Branch, Evaluation Services, June 2006.

## Appendix C — Evaluation Matrix

Questions and sub-questions / objectives	Performance indicators	Data-gathering methods / information sources
<b>Relevance of the TV5 Program</b>		
Is federal participation in TV5 still relevant in the current audiovisual context? In the current model, is the TV5 Program still compatible with the government's priorities and PCH's strategic objectives?		
Increase Canada's influence in the world.	<ul style="list-style-type: none"> <li>• Representation and role of Canadians within TV5-M's management bodies</li> <li>• Percentage and positioning of Canadian programs in TV5-M's programming schedule</li> <li>• Presence and range of Canadian content on TV5-M</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (annual reports, progress reports, meeting minutes)</li> <li>• Literature review</li> <li>• 2005 TV5 Charter</li> <li>• In-depth interviews</li> <li>• Expert opinions</li> </ul>
Enable Canadians to enjoy a variety of cultural experiences and share them with each other and the world.	<ul style="list-style-type: none"> <li>• Percentage and positioning of non-Canadian programs on TV5 QC</li> <li>• Range of TV5 QC's audience in Canada</li> <li>• Satisfaction rate of viewers in Canada</li> <li>• Diversity of program types and their representation rate in TV5-M's programming schedule</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (agreements, decisions, minutes)</li> <li>• TV5 QC's business plans (balance sheet)</li> <li>• TV5 QC's statements / reception reports</li> <li>• TV5 QC's annual reports to the CRTC</li> <li>• TV5's annual reports to the governments</li> <li>• Annual reports submitted by the SRC to PCH regarding the export budget</li> <li>• Audiometric data (BBM)</li> <li>• Survey of viewers (in Canada and abroad)</li> </ul>
<b>Success and impact</b>		
Is the TV5 Program generating positive spin-offs and the desired results for Canadians? Is it meeting the desired performance objectives without producing adverse effects?		
Contribution to Canada's international presence	<ul style="list-style-type: none"> <li>• TV5-M's impact throughout the world</li> <li>• Canadian influence on overall approaches, principles and funding levels</li> <li>• Percentage and positioning of Canadian programs in TV5-M's programming schedule</li> <li>• Satisfaction rate of viewers abroad</li> <li>• Percentage of Canadian content on TV5-M</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (decisions, meeting results, reports, minutes of meeting of the Conference of Ministers Responsible for TV5)</li> <li>• TV5-M's annual reports to the governments</li> <li>• Annual reports submitted by the SRC to PCH regarding the export budget</li> <li>• Foreign audience ratings (when available)</li> <li>• Audiometric data (BBM)</li> <li>• In-depth interviews</li> <li>• Expert opinions</li> <li>• Surveys among viewers abroad</li> </ul>
Contribution to the presence of the international Francophonie (in Canada and around the world)	<ul style="list-style-type: none"> <li>• Range of TV5-M broadcasts</li> <li>• Breakdown of programs by source (partner broadcasters)</li> <li>• Satisfaction rate of Canadian viewers</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (annual reports, financial data, contribution agreements, grant agreements)</li> <li>• TV5-M's and TV5 QC's annual reports to the governments</li> <li>• In-depth interviews</li> <li>• Expert opinions</li> <li>• Survey among viewers in Canada and abroad</li> </ul>
Contribution to the creation and production of Canadian audiovisual products	<ul style="list-style-type: none"> <li>• Percentage and positioning of Canadian programs in TV5's programming schedules</li> <li>• Budget breakdown (special projects)</li> <li>• Spin-offs for Canadian audiovisual products</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (performance reports, annual reports, financial data, contribution agreements, grant agreements)</li> <li>• Case studies (producers, artists, projects)</li> <li>• In-depth interviews (producers)</li> <li>• Expert opinions</li> </ul>
Canadians' access to a window on the cultural diversity of the Francophonie	<ul style="list-style-type: none"> <li>• TV5 QC's broadcasting range</li> <li>• Percentage of programs from TV5's partners broadcast on TV5 QC</li> <li>• Number of viewers and market share compared with the Télé-Québec, TFO, Canal D, ARTV, Historia and RDI channels</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (agreements, annual reports to the CRTC)</li> <li>• Analysis of statements produced by TV5 QC</li> <li>• Statistical data produced by TV5 QC</li> <li>• Audience ratings in Canada</li> <li>• Audiometric data (BBM)</li> </ul>

Summative Evaluation of the TV5 Program

Questions and sub-questions / objectives	Performance indicators	Data-gathering methods / information sources
	<ul style="list-style-type: none"> <li>• Number of viewers and market share compared with previous years</li> </ul>	<ul style="list-style-type: none"> <li>• In-depth interviews</li> <li>• Expert opinions</li> <li>• Analysis of mail from viewers</li> <li>• Survey of viewers</li> </ul>
<b>Cost-effectiveness / alternatives</b>		
<p>Is the TV5 Program using the most appropriate, efficient and cost-effective methods to reach its objectives, or should other models be considered?</p>	<ul style="list-style-type: none"> <li>• TV5-M's and TV5 QC's financial and budgetary data</li> <li>• TV5-M's and TV5 QC's revenue streams (public-sector funding, licence fees, subscriptions, advertising, etc.)</li> <li>• Cost of programs</li> <li>• Operating report on reception and traffic on TV5-M's and TV5 QC's Web sites</li> <li>• Spin-offs for Canadian audiovisual products</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (annual reports, financial data, partnership agreements, annual performance reports, reports to the CRTC)</li> <li>• Literature review</li> <li>• Statistical data produced by TV5-M and TV5 QC</li> <li>• In-depth interviews</li> <li>• Expert opinions</li> </ul>
<p>Do the governance and management structures of TV5-M and TV5 QC help to achieve the Government of Canada's objectives for participating in TV5?</p>	<ul style="list-style-type: none"> <li>• TV5 QC's and TV5-M's programming structure</li> <li>• Structure and breakdown of TV5-M's and TV5 QC's budget and projects</li> <li>• Government of Canada's influence on TV5-M's and TV5 QC's overall approaches, principles and funding levels</li> </ul>	<ul style="list-style-type: none"> <li>• Document review (decisions, meeting results / minutes, internal audit report, 2005 RMAF)</li> <li>• TV5-M's and TV5 QC's annual reports to funding governments</li> <li>• 2005 TV5 Charter</li> <li>• In-depth interviews</li> <li>• Expert opinions</li> </ul>

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## Appendix E — List of Key Informants

Organization	Name	Position	Stakeholder	Expert
<b>Informants from TV5</b>				
TV5-M	François Bonnemain	Chief Executive Officer	X	
	Suzanne Laverdière	Assistant Director General responsible for programming	X	
	Jacques Lagacé	Former representative of Télé-Québec on the Board of Directors	X	
TV5 QC	Suzanne Gouin	Chief Executive Officer	X	
	Claudette Paquin	Representative of TFO on the Board of Directors	X	
	Raymond Poirier	Representative of Canada on the Board of Directors	X	
	Claire Samson	Representative of the APFTQ on the Board of Directors	X	
<b>Stakeholders from the Canadian public sector</b>				
PCH	Jacques Paquette	Assistant Deputy Minister, International and Intergovernmental Affairs and Sport	X	
	René Bouchard	Director General, International Affairs	X	
	Madeleine Duchesne	Manager, International Francophonie	X	
	Annie Laflamme	Outgoing manager, TV5 Program	X	
Government of Canada officials abroad	Ferry de Kerckhove	Director General, International Organizations, DFAIT	X	
	François Filion	Communications Strategist, DFAIT	X	
	Sébastien Carrière	Cultural Advisor, Canadian Embassy in Senegal	X	
	François Laberge	Advisor — Switzerland and Liechtenstein, Canadian Embassy in Switzerland	X	
Government of Quebec officials	Daniel Cloutier	Director, Direction des médias, de l'audiovisuel et du multimédia, Ministère de la Culture et des Communications	X	
	Louise Gingras	Advisor on the TV5 file, Direction des médias, de l'audiovisuel et du multimédia, Ministère de la Culture et des Communications	X	
	Carl Boileau	Advisor on the TV5 file, Ministère des Relations internationales	X	
CRTC	Michel Arpin	Vice-Chairman, Broadcasting	X	
<b>Informants from foreign partner governments</b>				
France	Françoise Petit-Jean	Ministry of Foreign Affairs	X	
	Laurent Allary	Audiovisual Consultant, Embassy of France in Canada	X	

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Organization	Name	Position	Stakeholder	Expert
Belgium	Henry Ingberg	Secretary General, Ministry of the French Community	X	
	Thibault Mulatin	Advisor, Service général de l'audiovisuel et des multimédias, Ministry of the French Community	X	
Switzerland	Philippe Praz	Second Secretary, Embassy of Switzerland in Canada	X	
	Claude Wild	Minister-Counsellor, Embassy of Switzerland in Canada	X	
<b>Informants from the Canadian television industry</b>				
Representatives from different networks	Sylvain Lafrance	Senior Vice-President, French Services, SRC	X	
	Isabel Hardy	Director of International Operations, Institutional Affairs and Strategic Planning, SRC	X	
	Carole Bégin	Télé-Québec	X	
Producers	Jean-Claude de Bellefeuille	Bellefeuille Production	X	
	Mark Chatel	Balestra	X	
	Jean-Yves de Banville	Groupe ECP	X	
	Martin Roussy	Sogestalt Télévision, Équipe Spectra	X	
<b>Other informants</b>				
Canadian academics	François Demers	Université Laval		X
	Daniel Giroux	Centre d'études sur les médias		X
Other Canadian experts or key stakeholders	Jacques Bensimon	Government Film Commissioner and Chair of the National Film Board		X
	André Bureau	President, Astral Media	X	
	Alain Gourd	Président, Alain Gourd Communications Inc.		X
	Pierre Lampron	Vice-President, Quebecor Inc.	X	
Foreign expert	Dominique Wolton	Research Director, Centre national de la recherche scientifique, France		X



## Appendix F — Audience Ratings and Statistics

The following tables show certain data used to analyze audience ratings and statistics for the summative evaluation of the TV5 Program. They describe in particular the number of homes receiving the channel, the number of viewers it attracts as well as their profile, and the channel's ranking compared with its competitors.

### I. Distribution in Quebec and Canada

**Table F-1 — Homes Subscribed, 2001–06**

Distribution method	Number of homes subscribed as of August 31 (thousands)					
	2001	2002	2003	2004	2005	2006
<b>Quebec</b>						
• Cable	1,657.2	1,488.6	1,366.2	1,284.6	1,182.6	1,098.0
• Other digital systems	133.3	170.6	231.3	381.1	500.5	687.2
• Satellite, MATV* and telephony	186.4	264.5	341.6	366.9	450.3	513.0
Subtotal — Quebec	1,976.9	1,923.7	1,939.2	2,032.6	2,133.3	2,298.2
<b>Other provinces</b>						
• Cable	4,115.3	4,007.7	3,988.7	4,087.4	4,108.9	4,149.3
• Other digital systems	0.0	0.5	1.5	1.5	1.5	2.0
• Satellite, MATV* and telephony	8.0	16.3	22.6	58.1	58.1	45.9
Subtotal — other provinces	4,123.2	4,024.5	4,012.8	4,147.1	4,168.5	4,197.2
<b>Canada</b>						
• Cable	5,772.5	5,496.2	5,354.9	5,372.0	5,291.5	5,247.4
• Other digital systems	133.3	171.1	232.8	382.6	501.9	689.1
• Satellite, MATV* and telephony	194.4	280.8	364.2	425.0	508.4	558.8
Total — Canada	6,100.1	5,948.1	5,951.9	6,179.6	6,301.8	6,495.4

\* MATV: Master antenna television.

Source: TV5 QC.

### II. Canadian and Quebec audience

**Table F-2 — Audience by Region, 2002–03 to 2005–06**

Region	Average number of viewers			
	2002–03	2003–04	2004–05	2005–06
<b>24-hour time slot, Monday to Sunday, 2:00 a.m. to 2:00 a.m. the following day</b>				
English Canada	1,000	850	700	1,000
Francophone Quebec	6,400	6,900		
Francophone Montréal			6,300	7,200
Quebec excluding Montréal			3,600	3,600
Total — Canada as a whole	7,400	7,750	10,600	11,800

Region	Average number of viewers			
	2002-03	2003-04	2004-05	2005-06
<b>Monday-to-Sunday time slot, 6:00 p.m. to 11:00 p.m.</b>				
English Canada	1,800	1,600	1,200	2,100
Francophone Quebec	18,000	17,500		
Francophone Montréal			16,900	19,100
Quebec excluding Montréal			10,200	10,100
<b>Total — Canada as a whole</b>	<b>19,800</b>	<b>19,100</b>	<b>28,300</b>	<b>31,300</b>

Source: BBM Infosys, Francophone Quebec.

**III. Demographic profile of the Quebec audience**

**Table F-3 — Audience in Quebec by Age Bracket, 2001-02 to 2005-06**

Age bracket	Average number of viewers				
	2001-02	2002-03	2003-04	2004-05	2005-06
<b>24-hour time slot, Monday to Sunday, 2:00 a.m. to 2:00 a.m. the following day</b>					
2 to 17 years	400	400	400	700	600
18 years and over	5,900	6,000	6,500	9,200	10,200
25 to 54 years	3,000	2,700	2,700	3,000	2,700
18-24 years or 55 and over	2,900	3,300	3,800	6,200	7,500
<b>Total — all age groups</b>	<b>6,300</b>	<b>6,400</b>	<b>6,900</b>	<b>9,900</b>	<b>10,800</b>
<b>Monday-to-Sunday time slot, 6:00 p.m. to 11:00 p.m.</b>					
2 to 17 years	900	1,100	1,200	1,900	1,800
18 years and over	16,200	16,900	16,300	25,200	27,400
25 to 54 years	7,900	6,700	6,600	8,100	7,300
18-24 years or 55 and over	8,300	10,200	9,700	17,100	20,100
<b>Total — all age groups</b>	<b>17,100</b>	<b>18,000</b>	<b>17,500</b>	<b>27,100</b>	<b>29,200</b>

Source: BBM Infosys, Francophone Quebec.

**IV. Market shares in Quebec**

**Table F-4 — Francophone Quebec Market Shares by Age Bracket, 2001-02 to 2005-06**

Age bracket	Percentage of viewers				
	2001-02	2002-03	2003-04	2004-05	2005-06
<b>24-hour time slot, Monday to Sunday, 2:00 a.m. to 2:00 a.m. the following day</b>					
2 to 17 years	0.7	0.7	0.7	0.4	0.4
18 years and over	0.7	0.7	0.7	1.0	1.1
25 to 54 years	0.7	0.6	0.6	0.6	0.6
18-24 years or 55 and over	0.7	0.8	0.8	1.5	1.6
<b>Average — all age groups</b>	<b>0.7</b>	<b>0.7</b>	<b>0.7</b>	<b>0.9</b>	<b>1.0</b>

Age bracket	Percentage of viewers				
	2001-02	2002-03	2003-04	2004-05	2005-06
<b>Monday to Sunday time slot, 6:00 p.m. to 11:00 p.m.</b>					
2 to 17 years	0.8	0.3	0.8	0.5	0.6
18 years and over	0.8	0.9	0.8	1.2	1.3
25 to 54 years	0.8	0.7	0.6	0.7	0.7
18-24 years or 55 and over	0.8	1.1	1.0	1.8	1.9
Average — all age groups	0.8	0.8	0.8	1.1	1.2

Source: BBM Infosys, Francophone Quebec.

## V. Ranking compared with competing channels

**Table F-5 — Range of TV5 and Six Other Channels,  
2002-03 to 2005-06**

Channel	Average number of viewers with access to the signal			
	2002-03	2003-04	2004-05	2005-06
<b>Francophone Quebec, Monday-to-Sunday time slot, 6:00 p.m. to 11:00 p.m.</b>				
TV5	1,185,000	1,156,000	1,524,000	1,520,000
Télé-Québec	2,953,000	3,024,000	3,704,000	3,466,000
ARTV	864,000	1,038,000	1,221,000	1,314,000
Canal D	1,907,000	1,962,000	2,646,000	2,638,000
Historia	772,000	933,000	1,161,000	1,217,000
RDI	1,669,000	1,689,000	2,145,000	2,086,000
TFO*	79,000	75,000	271,000	266,000
Total — 7 channels	9,429,000	9,877,000	12,672,000	12,507,000
<b>Canada, Monday-to-Sunday time slot, 6:00 p.m. to 11:00 p.m.</b>				
TV5	1,684,000	1,589,000	1,974,000	1,977,000
Télé-Québec	3,101,000	3,188,000	3,834,000	3,511,000
ARTV	911,000	1,085,000	1,272,000	1,369,000
Canal D	2,045,000	2,094,000	2,717,000	2,701,000
Historia	801,000	974,000	1,196,000	1,248,000
RDI	2,033,000	2,084,000	2,464,000	2,381,000
TFO*	776,000	779,000	871,000	769,000
Total — 7 channels	11,351,000	11,793,000	14,328,000	13,956,000

\* TFO = Télévision française de l'Ontario.

Source: BBM audiometric service.

**Table F-6 — Market Shares of TV5 and Six Other Channels,  
2002–03 to 2005–06**

Channel	Average market share			
	2002–03	2003–04	2004–05	2005–06
<b>Francophone Quebec, Monday-to-Sunday time slot, 6:00 p.m. to 11:00 p.m.</b>				
TV5	0.8	0.8	1.1	1.2
Télé-Québec	3.1	3.2	3.8	3.1
ARTV	0.5	0.5	0.5	0.6
Canal D	2	2.1	2.5	2.5
Historia	0.8	0.9	0.8	0.7
RDI	1.7	1.5	1.7	1.6
TFO	0	0	0.1	0.1
<b>Canada, Monday-to-Sunday time slot, 6:00 p.m. to 11:00 p.m.</b>				
TV5	0.2	0.2	0.3	0.3
Télé-Québec	0.7	0.7	0.9	0.8
ARTV	0.1	0.1	0.1	0.2
Canal D	0.5	0.5	0.6	0.6
Historia	0.2	0.2	0.2	0.2
RDI	0.4	0.3	0.4	0.4
TFO	0.0	0.0	0.0	0.0

Source: BBM audiometric service.

## Appendix G — Survey Findings

### TV5 QC Survey Questionnaire

A total of 350 questionnaires were completed for the TV5 QC survey. Of these, 35 were rejected, bringing the final sample to 315 respondents. The following tables present only these respondents' quantified responses, which represent the great majority of data gathered.

#### I. TV5 Viewing

**Table G-1 — Television Viewing**

	How many hours a week do you spend watching television? (312 respondents)		Approximately how many hours a week do you spend watching TV5? (286 respondents)	
		%		%
Less than 5 hours	37	11.9	114	39.9
5 to 10 hours	92	29.5	107	37.4
11 to 20 hours	102	32.7	53	18.5
21 to 30 hours	56	17.9	9	3.1
31 hours or more	25	8.0	3	1.0

**Table G-2 — Frequency of TV5 Viewing**

	How frequently do you watch TV5? (305 respondents)	
		%
Every day	167	54.8
A few days a week	90	29.5
A few days a month	32	10.5
A few days a year	16	5.2

**Table G-3 — Time of the Day**

	At what time of the day do you watch TV5? (306 respondents)	
		%
In the daytime	13	4.2
At night (after 6:00 p.m.)	197	64.4
Both	96	31.4

**Table G-4 — Time of the Week**

	When in the week do you watch TV5? (302 respondents)	
		%
From Monday to Friday	67	22.2
On Saturday and/or Sunday	25	8.3
Both	210	69.5

**Table G-5 — Viewing Location**

	Where do you watch TV5? (304 respondents)	
		%
At home	271	89.1
At work	0	0.0
In other public places	1	0.3
In other private facilities	6	2.0
At home and at work	9	3.0
At home and in other public places	3	1.0
At home and in other private facilities	11	3.6
At home and in other public places or private facilities	1	0.3
In other public places or private facilities	1	0.3
In all these locations	1	0.3

**Table G-6 — Distribution Method**

	How do you receive TV5? (303 respondents)	
		%
Regular cable television (analog signal)	167	55.1
Digital cable television	74	24.4
Satellite television (package that includes TV5)	46	15.2
Ordinary cable and digital cable television	6	2.0
Ordinary cable and satellite television	5	1.7
Digital cable and satellite television	2	0.7
All of these distribution methods	3	1.0

**Table G-7 — Frequency of Web Site Visits**

	How often do you visit the TV5 Web site (www.tv5.ca)? (296 respondents)	
		%
Regularly (every week)	85	28.7
Occasionally (a few times a month)	74	25.0
A few times a year	56	18.9
This is my first visit	81	27.4

**II. TV5 Appreciation**

**Table G-8 — Familiarity With Programs**

	How many different TV5 programs are you familiar with? (302 respondents)	
		%
1	9	3.0
2	17	5.6
3	36	11.9
4	39	12.9
5	21	7.0
Over 5	180	59.6

**Table G-9 — Favourite Types of Programs**

Among the following types of programs featured on TV5, please pick your favourite three and rank them in ascending order (from 1 to 3).	First choice (306 respondents)		Among the three first choices (906 responses)	
		%		%
News and current events	145	47.4	227	25.1
Lifestyle	7	2.3	28	3.1
Discovery and adventure	22	7.2	84	9.3
Society and culture	37	12.1	99	10.9
Interviews and panel discussions	13	4.2	74	8.2
Documentaries	20	6.5	110	12.1
Investigative and special reports	23	7.5	115	12.7
Drama	3	1.0	32	3.5
Game shows	17	5.6	70	7.7
Sports	7	2.3	32	3.5
Variety shows	12	3.9	31	3.4
Other	0	0.0	4	0.4

**Table G-10 — Programs in Demand**

Which of the following types of programs would you want to see more often on TV5? (Please rank in ascending order from 1 to 7.)	Respondents	First choice		Average ranking
			%	Scale: 1–7
Animation/cartoons	112	23	20.6	4.25
Sports	124	24	19.4	3.73
Movies	226	85	37.6	2.66
Drama / TV series	162	24	14.8	3.34
Youth programs	112	14	12.5	3.89
Entertainment	197	41	20.8	3.06
Other	99	39	39.4	3.17

**Table G-11 — Awareness of Source of Programs**

Do you pay attention to the source of programs (i.e. the country they come from)? (300 respondents)		
		%
Yes	223	74.3
No	77	25.7

**Table G-12 — Preferences for Source of Programs**

What is your preferred source? (Please rank in ascending order from 1 to 4.)	Respondents	First choice		Average ranking
			%	Scale: 1–4
Africa	191	27	14.1	3.02
Canada	199	43	21.6	2.65
Europe, excluding France	222	23	10.4	2.45
France	230	130	56.5	1.92



**Table G-13 — Appreciation of Aspects of the Channel**

On a scale of 1 to 5 (where 1 means highly unsatisfactory, 3 means neither satisfactory nor unsatisfactory, and 5 means highly satisfactory), please rate the following aspects of TV5.	Respondents	Unsatisfactory		Neither satisfactory nor unsatisfactory		Satisfactory		Average result
			%		%		%	
Wealth of choice in program types (documentaries, culture, sports, variety shows, etc.)	294	43	14.6	62	21.1	189	64.3	Scale: 1–5 3.71
Breakdown of programs based on their source (Africa, Belgium, Canada, France, Switzerland)	282	42	14.9	102	36.2	138	48.9	3.45
Quality of program content	281	38	13.5	40	14.2	203	72.2	3.88
Quality of language used on TV5	287	36	12.5	17	5.9	234	81.5	4.13
Utilization of TV5 as an educational resource	272	39	14.3	99	36.4	134	49.3	3.49
Overall design quality of TV5 (presentation, content, programming)	286	32	11.2	65	22.7	189	66.1	3.80

**Table G-14 — Evaluation of the Channel’s Results**

On a scale of 1 to 5 (where 1 means totally disagree, 3 means neither agree nor disagree, and 5 means totally agree), please react to the following statements.	Respondents	Disagree		Neither agree nor disagree		Agree		Average result
			%		%		%	
Through TV5, Canadians enjoy diverse cultural experiences and share them with each other and the world.	291	24	8.2	59	20.3	208	71.5	Scale: 1–5 4.02
With TV5, one gets to know the other countries in La Francophonie.	281	20	7.1	25	8.9	236	84.0	4.27
TV5 is a prime showcase for content that is not available on other channels.	283	20	7.1	22	7.8	241	85.2	4.34
TV5 plays a useful role in learning and promoting French in Canada.	286	34	11.9	59	20.6	193	67.5	3.92
TV5 should have more Canadian programs.	277	124	44.8	89	32.1	64	23.1	2.66
TV5 should have more programs from countries in La Francophonie other than France.	287	69	24.0	100	34.8	118	41.1	3.23
TV5 should have more programs that target youth.	275	94	34.2	114	41.5	67	24.4	2.80
I find that Canadian programs are conveniently scheduled on TV5.	275	55	20.0	114	41.5	106	38.5	3.28

**Table G-15 — Evaluation of the Channel’s Strategies**

On a scale of 1 to 5 (where 1 means totally disagree, 3 means neither agree nor disagree, and 5 means totally agree), please react to the following statements.	Respondents	Disagree		Neither agree nor disagree		Agree		Average result
			%		%		%	
TV5 is an essential channel, just like Radio-Canada, TVA, Télé-Québec (or TFO if you live in Ontario), CBC, MTV, CNN, etc.	290	20	6.9	11	3.8	259	89.3	Scale: 1–5 4.58
To increase its funding, TV5 should show more commercials.	287	187	65.2	59	20.6	41	14.3	2.07
TV5 should be part of the basic package offered by cable operators and satellite distributors.	287	20	7.0	30	10.5	237	82.6	4.44
TV5 should be broadcast free of charge, just like Radio-Canada, TQS, TFO, etc.	285	25	8.8	25	8.8	235	82.5	4.41

**Table G-16 — Accessibility**

	Is it easy for you to receive TV5 in your region? (296 respondents)	
		%
Yes	244	82.4
No	29	9.8
Don’t know	23	7.8

**Table G-17 — Federal Government Funding**

	Did you know that the Government of Canada provides funding to TV5? (294 respondents)		Should the Government of Canada continue to provide funding to TV5? (291 respondents)	
		%		%
Yes	131	44.6	271	93.1
No	136	46.3	3	1.0
Don't know	27	9.2	17	5.8

**Table G-18 — Spin-offs for Canada**

What do you believe are the greatest benefits of TV5 for Canada? (Please rank the following in ascending order from 1 to 4.)	Respondents	First choice		Average ranking
			%	
Disseminating the international culture of the Francophonie all across Canada	258	99	38.4	Scale: 1–4 2.22
Giving Francophones and Francophiles across Canada access to high-quality programs in French	253	104	41.1	2.16
Using TV5 for educational purposes and to promote French in Canada	250	27	10.8	2.82
Other	59	10	16.9	3.25
Don't know	1	0	0.0	4.00

**Table G-19 — Relevance in the Face of a Changing Industry**

	Is the relevance of TV5 altered by the worldwide expansion of TV signals and greater access to new television channels? (274 respondents)	
		%
Relevance is increased	110	40.1
Relevance is jeopardized	49	17.9
Don't know	115	42.0

**Table G-20 — Audience Expansion Strategies**

	How do you think TV5 could perform better in terms of audience size? (Please check off all relevant boxes.) (607 responses)	
		%
Diversify broadcasting technologies (access via the Internet or cellphone, pay-per-view, etc.)	135	22.2
Make more room for programs from countries other than France	132	21.7
Produce programs that are more geared toward youth	77	12.7
Advertise more to make TV5 better known	178	29.3
Other	55	9.1
Don't know	30	4.9

**Table G-21 — Distinctive Features**

How does TV5 differ from other television channels? (Please rank the following in ascending order from 1 to 5.)	Respondents	First choice		Average ranking
			%	
Quality of information	260	80	30.8	Scale: 1–5 2.80 3.02 2.97 3.10 3.55 1.67
Quality of the French language	257	63	24.5	
Wealth of choice of program types in the programming	259	43	16.6	
Cultural diversity of La Francophonie reflected through the channel	263	56	21.3	
Other	40	13	32.5	
Don't know	12	10	83.3	

**Table G-22 — Television and the Internet**

	Do you watch television programs on the Internet? (296 respondents)	
		%
Yes	63	21.3
No	233	78.7

**Table G-23 — Interest in New Broadcasting Platforms**

	Would you like to receive TV5 programs on the Internet? (291 respondents)		Would you like to receive TV5 programs on your cellphone? (287 respondents)	
		%		%
Yes	124	42.6	21	7.3
No	76	26.1	184	64.1
Don't care	91	31.3	82	28.6

**III. General information**

**Table G-24 — Languages**

	What language(s) do you commonly use? (303 respondents)	
		%
French	132	43.6
English	3	1.0
French and English	126	41.6
French and Spanish	5	1.7
French and Arabic	1	0.3
French and other(s)	2	0.7
French, English and Spanish	17	5.6
French, English and Arabic	4	1.3
French, English and other(s)	6	2.0
French, Arabic and other(s)	1	0.3
French, English, Arabic and other(s)	1	0.3
French, English, Spanish and other(s)	2	0.7
French, English, Spanish and Arabic	2	0.7
French, English, Spanish, Arabic and other(s)	1	0.3

**Table G-25 — Gender**

	What is your gender? (304 respondents)	
		%
Female	142	46.7
Male	162	53.3

**Table G-26 — Yearly Income**

	In what yearly income bracket are you (in Canadian dollars)? (290 respondents)	
		%
Less than \$15,000	23	7.9
\$15,000 to \$29,999	38	13.1
\$30,000 to \$59,999	125	43.1
\$60,000 or over	104	35.9

**Table G-27 — Age**

	In what age bracket are you? (302 respondents)	
		%
Under 20	6	2.0
20 to 39	64	21.2
40 to 54	108	35.8
55 to 64	77	25.5
65 or over	47	15.6

**Table G-28 — Education**

	What is your level of schooling? (301 respondents)	
		%
High school / college studies	59	19.6
Undergraduate studies	125	41.5
Postgraduate studies	112	37.2
None of the above	5	1.7

**Table G-29 — Place of Residence**

	In which Canadian province or territory do you live? (293 respondents)	
		%
Newfoundland and Labrador	3	1.0
Nova Scotia	1	0.3
New Brunswick	8	2.7
Quebec	207	70.6
Ontario	38	13.0
Saskatchewan	1	0.3
Alberta	3	1.0
British Columbia	32	10.9

### TV5-M Survey Questionnaire

A total of 103 questionnaires were completed for the TV5-M survey. The following summary deals only with the respondents' quantified responses, representing the great majority of data gathered.

#### *I. TV5 Viewing*

**Table G-30 — Time of the Week**

	When in the week do you watch TV5? (147 responses)	
		%
Monday to Friday	83	56.5
Saturday and/or Sunday	64	43.5

**Table G-31 — Viewing Location**

	Where do you watch TV5? (Please check off all relevant boxes.) (102 responses)	
		%
At home	95	93.1
At work	2	2.0
In other public places	2	2.0
In other private facilities	3	2.9

**Table G-32 — Distribution Method**

	How do you receive TV5? (Please check off all relevant boxes.) (103 responses)	
		%
Direct reception / basic service (no cable, satellite or Internet)	13	12.6
Regular cable television (analog signal)	49	47.6
Digital cable television	15	14.6
Satellite television (package that includes TV5)	21	20.4
Television via the Internet or WebTV5	5	4.9

**Table G-33 — Frequency of Web Site Visits**

	How often do you visit the TV5 Web site (www.tv5.org)? (93 respondents)	
		%
Every day	7	7.5
Regularly (every week)	12	12.9
Occasionally (a few times a month)	22	23.7
A few times a year	22	23.7
This is my first visit	30	32.3

**II. TV5 Appreciation**

**Table G-34 — Familiarity With Canadian Programs**

	How would you assess your familiarity with TV5's broadcasting of programs from Canada? (96 respondents)	
		%
Very familiar	12	12.5
Quite familiar	24	25.0
Somewhat unfamiliar	37	38.5
Not familiar at all	23	24.0



**Table G-35 — Preferences for Canadian Programs**

What are your favourite Canadian programs? (From the following, choose your favourite three and rank them in ascending order, from 1 to 3.)	First choice (75 respondents)		Among the three first choices (184 responses)	
		%		%
Découverte	17	22.7	32	17.39
Entre nous	0	0.0	5	2.72
Le Journal de Radio-Canada	20	26.7	43	23.37
Le Point	9	12.0	34	18.48
Un gars, une fille	19	25.3	44	23.91
Bonjour madame croque-cerise (youth)	0	0.0	4	2.17
Village en vue	1	1.3	4	2.17
Catherine	6	8.0	9	4.89
L'esprit des lieux	0	0.0	4	2.17
Other	3	4.0	5	2.72

**Table G-36 — Favourite Types of Program**

Among the following types of programs featured on TV5, please pick your favourite three and rank them in ascending order (from 1 to 3).	First choice (92 respondents)		Among the three first choices (273 responses)	
		%		%
News and current events	53	57.61	62	22.71
Lifestyle	2	2.17	14	5.13
Discovery and adventure	8	8.70	21	7.69
Society and culture	6	6.52	27	9.89
Interviews and panel discussions	1	1.09	28	10.26
Documentaries	5	5.43	33	12.09
Investigative and special reports	4	4.35	36	13.19
Drama	4	4.35	16	5.86
Game shows	2	2.17	7	2.56
Sports	5	5.43	13	4.76
Variety shows	1	1.09	13	4.76
Other	1	1.09	3	1.10

**Table G-37 — Awareness of Source of Programs**

Do you pay attention to the source of programs (i.e. the country they come from)? (94 respondents)		
		%
Yes	60	63.8
No	34	36.2

**Table G-38 — Preferences for Source of Programs**

What is your preferred source for programs? (Please rank the answers in ascending order, from 1 to 4.)	Respondents	Average ranking
		Scale: 1–4
Africa	58	3.40
Canada	62	2.56
Europe, excluding France	62	2.27
France	62	1.82

**Table G-39 — Appreciation of Aspects of the Channel**

On a scale of 1 to 5 (where 1 means highly unsatisfactory, 3 means neither satisfactory nor unsatisfactory, and 5 means highly unsatisfactory), please rate the following aspects of TV5.	Respondents		Unsatisfactory		Neither satisfactory nor unsatisfactory		Satisfactory		Average result
				%		%		%	
				%		%		%	Scale: 1–5
<b>For programs from all sources</b>									
Wealth of choice of program types (documentaries, culture, sports, variety shows, etc.)	92	20	21.7		25	27.2	47	51.1	3.45
Breakdown of programs based on their source (Canada, France, Switzerland, Belgium, Africa)	89	21	23.6		41	46.1	27	30.3	3.06
Quality of TV5's overall presentation	90	16	17.8		19	21.1	55	61.1	3.66
Quality of program content	91	22	24.2		18	19.8	51	56.0	3.40
Quality of language on TV5	92	14	15.2		6	6.5	72	78.3	4.00
<b>For Canadian programs</b>									
Content quality of Canadian programs	67	13	19.4		25	37.3	29	43.3	3.33
Relevance of Canadian programs in the programming schedule	65	17	26.2		28	43.1	20	30.8	3.05
Frequency of Canadian programs in the programming schedule	65	22	33.8		27	41.5	16	24.6	2.86
Wealth of choice of Canadian program types (documentaries, culture, variety shows, etc.)	65	17	26.2		28	43.1	20	30.8	3.06
Originality and specifically Canadian character of programs chosen to represent Canada	64	17	26.6		25	39.1	22	34.4	3.13

**Table G-40 — Evaluation of the Channel’s Results**

On a scale of 1 to 5 (where 1 means totally disagree, 3 means neither agree nor disagree, and 5 means totally agree), please react to the following statements.	Respondents	Disagree		Neither agree nor disagree		Agree		Average result
			%		%		%	
With TV5, one gets to know the other countries in La Francophonie.	92	7	7.6	19	20.7	66	71.7	Scale: 1–5 3.95
TV5 is a prime showcase for content that is not available on other channels.	92	14	15.2	15	16.3	63	68.5	3.88
With TV5, one gets to know Canada and its culture via Canadian programming in the TV schedule.	84	19	22.6	33	39.3	32	38.1	3.19
With TV5, one gets to appreciate the Canadian Francophonie, its artists and its audiovisual productions via Canadian programming in the TV5 schedule.	86	28	32.6	35	40.7	23	26.7	2.97
TV5 should have more programs from countries in La Francophonie other than France.	91	21	23.1	20	22.0	50	54.9	3.49
TV5 should have more Canadian programs.	87	24	27.6	33	37.9	30	34.5	3.15
I find that Canadian programs are conveniently scheduled on TV5.	84	31	36.9	37	44.0	16	19.0	2.71
TV5 should have more programs that target youth.	87	35	40.2	30	34.5	22	25.3	2.76

**Table G-41 — Suggestions for Audience Expansion**

If you could make suggestions about how to improve Canada’s participation in TV5, what would they be? (Rank in order of importance according to your preferences, adding your comments if needed.)	Respondents	First choice		Average ranking
			%	
Increase the number of programs from Canada.	57	15	26.3	Scale: 1–4 2.32
Increase the variety of programs from Canada. (Mention some favourite categories.)	56	14	25.0	2.27
Increase the frequency of programs from Canada.	53	14	26.4	2.28
Other	18	7	38.9	2.39

**Table G-42 — Relevance in the Face of a Changing Industry**

	Is TV5's relevance jeopardized by the worldwide expansion of TV signals and improved access to new television channels? (88 respondents)	
		%
Yes	13	14.8
No	50	56.8
Don't know	25	28.4

**Table G-43 — Audience Expansion Strategies**

	How do you think TV5 could perform better in terms of audience size? (Please check off all relevant boxes.) (184 responses)	
		%
Diversify broadcasting technologies (access via the Internet or cellphone, pay-per-view, etc.)	40	21.7
Make more room for programs from countries other than France	40	21.7
Produce programs that are more geared toward youth	26	14.1
Advertise more to make TV5 better known	55	29.9
Other	16	8.7
Don't know	7	3.8

**Table G-44 — Distinctive Features**

How does TV5 differ from other television channels? (Please rank the following in ascending order.)	Respondents	Average ranking
		Scale: 1–5
Quality of information	84	2.63
Quality of the French language	86	3.10
Wealth of choice of program types in the programming	81	2.93
Cultural diversity of La Francophonie reflected through the channel	83	3.12
Other	14	3.71

**Table G-45 — Television and the Internet**

	Do you watch television programs on the Internet? (95 respondents)		Do you download TV5 programs from the Internet? (93 respondents)	
		%		%
Yes	25	26.3	6	6.5
No	70	73.7	83	89.2
Indifferent			4	4.3

**Table G-46 — Interest in New Broadcasting Platforms**

	Would you like to receive TV5 programs via the Internet? (88 respondents)		Would you like to receive TV5 programs via your cellphone? (91 respondents)	
		%		%
Yes	42	47.7	6	6.6
No	26	29.5	72	79.1
Don't care	20	22.7	13	14.3

**III. General information**

**Table G-47 — Languages**

	What language(s) do you commonly use? (Please check off all relevant boxes.) (211 responses)	
		%
French	98	46.4
English	60	28.4
Spanish	20	9.5
Arabic	1	0.5
Other	32	15.2

**Table G-48 — Gender**

	What is your gender? (98 respondents)	
		%
Female	54	55.1
Male	44	44.9

**Table G-49 — Age**

	In what age bracket are you? (98 respondents)	
		%
Under 20	0	0.0
20 to 39	70	71.4
40 to 54	19	19.4
55 to 64	6	6.1
65 or over	3	3.1

**Table G-50 — Education**

	What is your level of schooling? (98 respondents)	
		%
High school / college studies	8	8.2
Undergraduate studies	20	20.4
Postgraduate studies	69	70.4
None of the above	1	1.0