

French-speaking Canadians and  
English-language television

Viewing trends from 1976 to 1981

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FRENCH-SPEAKING CANADIANS AND  
ENGLISH-LANGUAGE TELEVISION:  
VIEWING TRENDS FROM 1976 TO 1981

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Department of Communication Sciences  
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This analytical study was conducted by André H. Caron, Luc Giroux, and Chantal Mayrand of the University of Montreal,\* with the able assistance of researchers Carmen Beorchia, Denis Catafard and Maggy Saragossy, graduate students in the Department of Communication Sciences at the same university. Acknowledgement is due also to Mr. Michel Saint-Denis for his valuable graphic contributions.

Our report is in fact a revised, condensed version of an earlier study submitted to the Département of Communications under the title "L'écoute des stations de télévision anglophone par les Canadiens dont la langue d'usage est le français: Évolution 1976-1981." As the original study was too comprehensive for general consumption, we have redrafted the original content into a format more suitable for wide distribution.

The authors wish to express their gratitude to Madame Josée Bélanger for her speed and efficiency in typing the manuscript, and to Messrs Gérard Malo and Michel Tremblay, from the Bureau of Broadcast Measurement (BBM) and the Department of Communications respectively, for their wholehearted cooperation.

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### SUMMARY

Our research had a dual objective: to assess whether French-speaking Canadians were watching more and more English-language television, and to identify the key variables linked to this viewing pattern.

This is a retrospective study, based on data gathered by BBM (Bureau of Broadcast Measurement) during its 1976, 1978, 1979 and 1981 autumn surveys. For the purposes of our own research, the population segment identified as French-speaking is one in which French is the **language of normal usage**.

We documented a marked increase in the viewing of English-language television of both Canadian and American origin. In Montreal, the proportion of total viewing time devoted to English-language programming rose from 14.2 per cent in 1976 to 20.5 per cent in 1981, about a 1 per cent annual increase. This trend has been somewhat slower-paced across the rest of the province: the proportion grew from 5.7 per cent to 9.1 per cent over the same period. In addition, significant regional fluctuations were noted, particularly outside the province of Quebec.

A number of variables have a direct bearing on English-language television viewing by the French-speaking population. Understandably, French-speaking viewers who describe themselves as bilingual are more inclined to watch English-language programs than are unilingual viewers, and they are doing so at an increasing rate. Also apparent is a close link between cable television subscription and a tendency to tune in to English-language channels, particularly American stations, although there is only a marginal difference between the growth rates for subscribers and non-subscribers. The influence of cablevision on viewing habits is more pronounced among bilingual viewers than among unilingual French-speaking viewers.

Our analysis also considers other variables, all having a bearing of some kind on English-language television viewing; sex, age, number of persons per household, working hours, education, quintile ratings, and program time periods.

For example, there appears to be a direct relationship between age and English-language program consumption; the rate of increase climbs more sharply for younger viewers than for adults.

Our findings suggest a foreseeable erosion of the French-language television audience in favour of English-language viewership, since demographic trends will enlarge those population segments most susceptible to the lures of English-language programming: bilinguals and cable subscribers.





## INTRODUCTION

"Canada has the strongest and most technically advanced cable distribution system in the world. We are now building on this system, and our own satellite technology, to enable the broadcasting system to expand its domestic audience and revenue base, and to guarantee that we have an ongoing vehicle for Canadian programming."<sup>1</sup>

Broadcasting systems have evolved in strikingly various ways depending on their country of origin. In Canada, the government-backed effort to provide programming that reflects the country's social and cultural directions was instrumental in the development of a truly national broadcasting system.

The proximity of the United States and Canada together with their extensive trade relationship, has historically favoured the unrestricted movement of foreign cultural images across our borders. Thus the creation of a national television network in 1952 represented the culmination of an effort to attract an audience that had already been conditioned to American television programming. However, while public television was by definition committed to follow official cultural policy guidelines, the privately-owned networks offered a greater potential for innovation guided by the precepts of free enterprise. Canada thus found itself endowed with a dual production and broadcasting system, striving to strike a balance between the advantages and drawbacks of each system. Moreover, Canada's vast expanse called for the installation of wide-reaching communication facilities. In 1982 the total Canadian population watched more than 560 million hours of television per week.<sup>2</sup> Average weekly viewing time rose from 17.5 hours in 1968<sup>3</sup> to 23.7 hours in 1982<sup>4</sup>, and has remained more or less stable for the past three years. In 1981 cable television was available to 78 per cent of all Canadian households and 58 per cent were subscribers.<sup>5</sup>

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1. Hon. Francis Fox, Minister of Communications, Towards a new national broadcasting policy, Department of Communications, March 1983, Ottawa.
  2. BBM, Television and Radio Data, 1983.
  3. Television Viewing Hours in Canada 1968-1973, CRTC, 1974 (unpublished).
  4. BBM, Television and Radio Data, 1983.
  5. Cable distribution, Statistics Canada, 1981.

More than 75 per cent of all Quebec households had access to cable service in 1981, and 45 per cent had subscribed to it. In the same year the subscription levels in New Brunswick and Ontario were 42 per cent and 64 per cent respectively.<sup>6</sup>

In a special report<sup>7</sup> the CRTC pinpointed the rapid growth in access to American and Canadian English-language stations between 1967 and 1977. In Quebec, for example, the proportion of households with access to at least one American station jumped from 29 per cent in 1967 to 48 per cent in 1977, while in New Brunswick the figures rose from 17 per cent to 57 per cent over the same period. As for Ontario, 74 per cent of households were already offered at least two American stations in 1967, and the proportion climbed to 95 per cent by 1977. Meanwhile, by 1977 Radio-Canada's French television network was reaching 99 per cent of the total population in Quebec, 88 per cent in Ontario and 86 per cent in New Brunswick.

The presence of foreign television programming has periodically aroused the attention of Canadian political figures; in 1970 a special senate committee (the Davey Commission) published its report on the mass media,<sup>8</sup> which specifically examined the extent to which various media affected Canadian economic and social life. The commission detected even then a tendency among Canadians to favour American television programming over the Canadian variety.

This observation found additional support six years later in the findings of the LaMarsh Committee on violence in the media;<sup>9</sup> namely, that Canadians residing outside Quebec showed a decided preference for American television. Conversely, French-speaking Quebec viewers seemed to favour national programming to which they could relate more easily, or at least such appeared to be the case in 1976.

Another CRTC report published in 1977<sup>10</sup> provided further corroboration of this trend, revealing that during prime time (6:00 p.m. to midnight) only 29 per cent of the shows viewed by English-speaking Canadians were Canadian-content programs, while French-speaking viewers watched this type of programming 65 per cent of the time period.

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6. Ibid.

7. Special report on Canadian broadcasting: 1968-1978, CRTC, 1979.

8. Report on the Special Senate Committee on Mass Media, Vols I-III, Queen's Printer for Canada, Ottawa, 1970.

9. Report of the Royal Commission on Violence in the Communication Industry, Vols 1-7, Queen's Printer for Ontario, Toronto, 1976.

10. TV in Canada: What Canadians choose to watch, CRTC, 1977.

But the number of published studies enabling us to pinpoint an evolutionary trend over the years is quite limited. In fact, even the criteria used to define the francophone population are not consistent; in some instances the key consideration is French as the mother tongue, while others adopt the standard of French as the language of normal use. A number of sources deal with the French-speaking population on a nationwide scale, but others focus on the Quebec population only.

By way of illustration, the data base available for tracking viewer preferences in Quebec covers the entire population of the province, French-speaking and English-speaking alike. The data show that ENG\* station viewership grew from 20 per cent in 1976 to 26 per cent in 1981, primarily due to increased consumption of AM programming at the expense of FR channels.

However, these figures fail to distinguish between French-speaking, English-speaking and other ethnic group audiences, nor do they reflect population displacements and fluctuations during the period covered. We are thus given an inaccurate impression of the channel switch-over phenomenon observed among French-speaking viewers.

Another significant point - these ratings overlook the origins of program content; indeed, a substantial portion of AM and other non-Canadian television programming is fed through the FR networks. The Kiefl study<sup>11</sup> shows that 32 per cent of all television programs shown on FR channels are foreign productions.

The abundance of AM content in national network programming, the proliferation of channels through cable distribution, and forthcoming developments in satellite technology are all factors meriting close study before Canada will be able to forecast their impact on its economic and social life.

The issues at stake are even more disturbing for French-speaking Canadians, since they are being subjected to a double-pronged cultural invasion from both English-speaking Canada and the United States. Indeed, some surveys indicate that francophone Canadians, long considered to be sheltered from such onslaught, are proving to be increasingly receptive to ENG television broadcasting on both the Canadian and American networks.

\* NOTE For the sake of brevity, the following abbreviations will be used: ENG (English-language), EC (English-Canadian), AM (American), and FR (French-language).

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11. B. Kiefl, New Developments in Audience Research for Corporate Planning, CBC, Ottawa, 1982.

Key determinants to ENG program viewing appear to include particularly a knowledge of English and cable service availability. It is therefore essential to examine these factors systematically in order to better understand the already-noted viewership shift.

It is for this reason that the Department of Communications has expressed its concern over ENG television viewing by the French-speaking population:

"(...) a number of communication experts concur that these are signs of an underlying trend, as yet barely discernible, whereby a share of television viewing time by the French-speaking audience is gradually being shifted to English-language programming. However, in the absence of historical background data on the distribution of viewing time between the French- and English-language broadcasting stations as concerns the French speaking viewing public, we are unable to check this theory. It is therefore a matter of assembling the necessary data to determine the actual growth rate of this observed phenomenon (...)"<sup>12</sup>

In June 1982 the Department of Communications appointed the writers to conduct a study with the following dual objective:

"The objectives of this study are two-fold; first, to trace the evolution of viewing time distribution between the English-language and French-language television broadcasting stations with regard to their French-speaking viewing public. Secondly, you are to determine and analyze the factors affecting French-speaking viewer behaviour in the various markets designated and report on prevailing trends noted in the course of your research."<sup>13</sup>

In carrying out this assignment our survey concentrates both on measuring the increasing preference for ENG programming over the years and on identifying the key factors contributing to this trend. In so doing we also hope to develop a methodology that may be adopted for use in connection with future follow-up studies.

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12. Évolution de la répartition de l'écoute des francophones entre les stations de télévision de langue française et de langue anglaise.  
Research contract draft, Department of Communications, Ottawa, 1982.

13. Ibid.

## METHOD

Let us briefly review the two objectives established by the Department of Communications: to assess the viewership transfer trend from FR to ENG programming, and to determine the main variables contributing to ENG broadcasting audience ratings.

The department was particularly interested in having the following variables evaluated:

- . Time-related fluctuations (1976-81)
- . Regional differences
- . Types of program content
- . Broadcast origin (Canadian or American)
- . Age groups
- . Viewing time periods

Our first task was therefore to devise a research strategy and develop a compatible cost estimate enabling us to achieve our twin objectives while giving due consideration to these variables.

### 1. DATA SOURCES

As our study would be by definition retrospective, our primary source of data was almost self-evident; it would have to be the Bureau of Broadcast Measurement (BBM), a firm with a long record of authoritative surveys on Canadian television audience viewing habits and their socio-demographic characteristics. BBM's semi-annual surveys have the further advantage of being based on sizeable sampling groups, thereby yielding estimates of sufficient accuracy for our purposes. Accordingly it was to this firm, whose subscribers include the major Canadian television networks, that we turned for our basic data.

The sampling methods used by BBM to produce its published survey reports are summarized in the Appendix.

### 2. GENERAL FRAMEWORK OF ANALYSIS

The data required for our various analyses were not immediately available to us, since the BBM (although its data-gathering procedures are quite thorough) is primarily committed to supplying its subscribers with material of commercial interest; i.e., viewership ratings and target audience shares for a specific group of stations.

BBM survey results thus almost invariably focus on the entire population of a given market area, distinguishing sub-populations only by age group and sex. Since 1981, however, BBM has produced a special report focusing on the distinctive characteristics of the francophone and

anglophone television audiences. This report contains some material of interest to us, but it is done for the Montreal area only. Moreover, BBM ratings are reported on the basis of time periods and programming without regard to the language of broadcast.

There is a vast potential in the data gathered by BBM, which has not been fully exploited: for example, each viewer survey folder contains questions on the language of normal use, bilingualism, cable distribution, occupation, etc. All this data is of vital interest to anyone involved in a thorough study of ENG program viewing by the French-speaking population. Accordingly, we asked BBM to pull several series of statistical profiles, designed to meet the criteria appropriate to our survey.

This concept of a statistical profile warrants explanatory comment, since source data were ordered, delivered and structured on this basis.

## 2.1 Definition of a profile

**A profile is a population segment that forms homogenous entity when considered in the light of one or more variables. These variables, which function as basic criteria for determining the configuration of the profile, are termed restrictive or segmenting variables.**

Let us suppose that we set up a profile based on the following restrictive variables: **year, cable distribution and bilingualism**. One of the profiles thus defined will be the population segment consisting of unilingual non-subscribers for the year 1976. Obviously, our analysis will include not just an examination of viewership contained in a single profile, but a comparison of all the various profiles contained in a given structure. The preceding example would require the following profiles:

Year (1976 - 1978 - 1979 - 1981)	4 levels
x	
Cable TV (subscribers and non-subscribers)	2 levels
x	
Official languages (unilingual and bilingual)	2 levels
x	

To assess the impact of variables for year, cable TV and official language proficiency we would have to order  $4 \times 2 \times 2 = 16$  profiles. The obvious advantage of this cumulative approach is that it enables us to analyze both the effects inherent in each variable and their combined effects (interaction).

All the analyses performed as part of this study were derived from four distinct profile structures. The following sections describe the categories of variables used in our research: selection, restriction, control and viewing habits measurement.

## 2.2 Selection variable

The selection variable is that used at the outset to define the target population under study. In this case, **only those persons surveyed who declared French to be their normal language of use were taken into account.** The target population thus defined will be segmented by restrictive variables for analytical purposes. The choice of normal language of use as a criterion to distinguish francophones from anglophones is somewhat unusual, for Statistics Canada generally uses mother tongue as its standard. However, that agency's primary concern is demographic matters; those interested in cultural phenomena will find that language of normal use is a better yardstick with which to identify a language group. Moreover, since this survey involves audience measurement on the basis of language criteria, we found it more appropriate to assume that those who use French at home make up the target audience of FR channels.

## 2.3 Restrictive variables

As noted above, restrictive variables are used to segment the total population into mutually exclusive sub-populations that can then be subjected to comparative analysis. The selection of restrictive variables is consequently a critical step, since they determine the factors to be matched against audience ratings. A brief description of each of the restrictive variables selected is given below.

### 2.3.1 Official languages (two levels - Profile 1)

This variable determines two sub-populations: francophones and anglophones. Its importance in relation to ENG station viewership is self-evident.

### 2.3.2 Cable distribution (two levels - Profile 1)

Cable TV subscribers are segregated from non-subscribers. Here again the effects are quite obvious, since among other things cable TV service facilitates access to AM television channels.

### 2.3.3 Regions (13 levels: 11 regions and two consolidations - Profile 1)

The phenomenon of ENG program viewing may very well be linked to geographical location: urban or rural, within or outside Quebec, channel capacity, size of surrounding anglophone population, etc. We have selected 11 specific regions plus two regional consolidations for a broader scope of analysis.



Specific regions:

Outside Quebec: Sudbury/Timmins/North Bay, Ottawa, Moncton.

Quebec: Rouyn, Hull, Montreal, Trois-Rivières,  
Chicoutimi/Jonquières, Quebec City,  
Rimouski, Sherbrooke.

Consolidations:

a) **All of Quebec excluding Montreal.** This consolidation will enable us to compare Montreal with the rest of Quebec.

b) **So-called "rural" Quebec.** This geographical entity is obtained by extracting the following urban regions from the province as a whole: Rouyn, Hull, Montreal, Trois-Rivières, Chicoutimi/Jonquières, Quebec City, Rimouski, Sherbrooke.

The term "rural" is to be treated with circumspection, for this consolidation is not a perfect entity. Our definition in fact includes such medium-sized towns as Rivière-du-Loup and St-Hyacinthe. Although we would have preferred to obtain more purely rural survey data, its retrieval would have been too costly.

2.3.4 Years (four levels - Profiles 1 to 3)

Our analysis covers the years 1976, 1978, 1979 and 1981. Here again, budget restrictions forced us to disregard the years 1977 and 1980, but for the purposes of trend linearity verification the presence of median years should suffice.

2.3.5 Quintiles (five levels - Profile 2)

Following each Canada-wide survey, the BBM divides its entire sampling group into five equal percentile distributions called **quintiles**, on the basis of weekly viewing time. The first quintile therefore represents the 20 per cent of Canadians who watch the least television, and the last quintile comprises the 20 per cent who are the most avid viewers. This distribution enables us to compare both light and heavy television viewing habits.

2.3.6 Age (one level - Profile 3)

The analysis of such variables as education and occupation is restricted to adults only; therefore some of our subsequent analyses will focus on interviewees over 18 years of age.

### 2.3.7 Working hours (three levels - Profile 3)

To the same extent that channel capacity affects the supply side of television viewing, viewer working hours have an impact on demand. Persons surveyed were accordingly placed in one of the following three working-hour classifications: unemployed, part-time workers (1-20 hours per week) and full-time workers (including quasi-full employment; i.e., over 20 hours per week). For obvious reasons this variable will apply only in conjunction with the preceding age limitation, so that children and retired persons need not be segregated from the unemployed category.

### 2.3.8 Time periods (five levels - Profile 4)

Quite understandably, television viewing habits have much to do with the way programming is scheduled.

Programs are aired at different times during the day in accordance with the preferences of the audiences available at those times. So, if we are interested in determining the type of ENG programming most likely to attract French-speaking viewership, this variable takes on definite significance.

We conducted a special analysis of francophone audience viewing for the following time periods: morning (6:00 a.m. to noon), afternoon (noon to 4:00 p.m.), late afternoon (4:00 p.m. to 6:00 p.m.), evening (6:00 p.m. to 11:00 p.m.) and late evening (11:00 p.m. to 2:00 a.m.).

It is worth pointing out, however, that this restrictive variable, unlike the preceding ones, covers the entire population without segmenting it into mutually exclusive entities. Only **viewing** itself can be said to be segmented according to various viewing time periods.

## 2.4 Control variables

Segmentation variables are for the most part socio-culturally oriented, but several features of a socio-demographic nature are also recorded at the time of interview; sex, age, education and number of persons per household. The distinction is not a critical one and we have made it more in the interest of consistent methodology than for any other reason. The profile structure is such that a population can be segmented **simultaneously** in accordance with several variables. For example, the use of cable distribution access and official languages as restrictive variables would yield four profiles, enabling us to examine the interactive relationship between those variables: unilingual cable subscribers vs. unilingual non-subscribers, etc. Control variables have

not been used in profile determination, with the result that a given profile will show viewer behaviour patterns for both sexes and all age groups, but never the cross-relationship between the two variables; e.g. males aged 18-24 vs. females of the same age group.

This constraint somewhat hampers detailed analysis, but it will soon become evident that sound methodological and statistical considerations make it impractical to permutate these cross-variables ad infinitum. The control variables used in our survey at one stage or another are the following:

- 2.4.1 Sex:  
Males, females.
- 2.4.2 Age:  
2-11 years, 12-17 years, 18-24 years, 25-34 years,  
35-49 years, 50 and over.
- 2.4.3 Education:  
Secondary level or less, vocational- or college-level  
studies, University level - complete or partial course  
of studies.
- 2.4.4 Number of persons per household  
One, two, three or four, five or more.

## 2.5 Audience measurement

Once the various factors influencing television viewing habits from different sources have been determined, it remains for us to define the measurement standards to be used in audience rating.

### 2.5.1 Time frame

Television viewing time is always shown on a **weekly** basis. Viewing hours run from 6:00 a.m. to 2:00 a.m. from Monday through Sunday; the only exception to this rule is found in our analysis of Profile 4, where viewing time is broken down into five time periods.

### 2.5.2 Broadcast station classifications

Unless otherwise stipulated, television viewing will be reported by station groups coded as follows: French-language stations (**FR viewership**), English-Canadian stations (**EC viewership**), and American stations (**AM viewership**). In those instances where EC and AM viewing are combined, reference will be made to English-language program viewership (**viewership ENG**). It should also be noted that our own data base includes viewing figures for all stations cited by persons interviewed and is not limited to those rated individually in the official reports published by BBM. As a matter of fact, the BBM reports do not list stations with what is considered negligible market penetration.

The following networks were covered in the course of this study:

French networks (FR)

Société Radio-Canada (SRC)  
Société Radio-Québec (SRQ)  
Les Téléviseurs Associés (TVA)  
Télévision française (TVFQ)

Canadian English-Language networks (CA)

Canadian Broadcasting Corporation (CBC)  
Television Network Ltd. (CTV)  
Global Communications Ltd. (Global)  
Ontario Educational Communication Authority (CTVO)

American networks (AM)

National Broadcasting Corporation (NBC)  
Columbia Broadcasting System (CBS)  
American Broadcasting Corporation (ABC)  
Public Broadcasting System (PBS)

2.5.3 Viewing indicators

The following indicators are used consistently throughout this study for each of the above broadcasting station groups:

Percentage of viewing time: Percentage of overall weekly viewing time attributable to a particular station group;

Audience share: Percentage of the population which has tuned into programming of a given station group for at least 15 minutes per week.

Number of hours/population (h/pop): Weekly viewing hours accorded to a given station group as averaged across the total population base (i.e., viewing hours per station divided by the total population figure).

When matched against the percentage of viewing time this measurement might appear somewhat redundant, but viewing time percentage figures alone can be misleading. For example, an observed increase in ENG program viewership could be the result of any one of the following scenarios:

- Increase in FR viewing accompanied by an even greater increase in ENG viewing;
- Drop in FR viewing, no change in ENG ratings;

- Drop in FR viewing, increase in ENG viewing;
- Drop in both FR and ENG viewing, but less ENG decline.

The hours/population measurement gives us a means of shading our interpretation of findings.<sup>1</sup>

### 3. PROFILE STRUCTURES

We have already described the restrictive variables used at various stages of our study, but it should be stressed that a simultaneous analysis of all these variables acting in concert was entirely out of the question. Let us recall that the number of profiles generated by a given structure is the product of all the variable levels contained in that structure. Segmentation according to all applicable variables would therefore give us the following result: official languages (2) X cable distribution levels (2) X regions (13) X years (4) X quintiles (5) X occupation levels (3) = 3,120 profiles!

A comparative analysis of all these profiles would be indeed an unsurmountable task. Statistically speaking, the number of persons per profile or cell would have been much too small, and from the point of view of methodology it becomes practically impossible to interpret the sum total of interactions between the variables, not to mention the further compounding of the problem when control variables enter the picture. Accordingly, we had little choice but to opt for more manageable sub-groupings based on restrictive variables having significant interaction potential. Initially we had devised four such sub-groupings, but subsequently we divided Profile 1 into two sections in the interest of clarity. Listed below are the restrictive variables ultimately selected, together with their applicable control variables, if any:

#### Profile 1A:

Restrictive variables: Official languages, cable distribution and regions (Montreal and the rest of the province) for the years 1976, 1978, 1979 and 1981.

Control variables: Sex, age and number of persons per household.

---

1. In our earlier more comprehensive study, we used a fourth audience measurement yardstick, viewing hours per viewer, which made it possible for us to indulge in even further refinement in evaluating data. These additional shadings were not, however, sufficiently significant to warrant inclusion this presentation.

Profile 1B:

Restrictive variables: Official languages and cable distribution in 1976 and 1981 for 11 specific regions.

Profile 2:

Restrictive variables: Viewership quintiles in Montreal and elsewhere in Quebec for the years 1976 and 1981.

Profile 3:

Restrictive variables: Analysis in terms of working hours for viewers 18 years of age and over in Montreal and elsewhere in Quebec for 1976 and 1981.

Control variables: Sex, age and education.

Profile 4:

Restrictive variables: Analysis in terms of viewing time periods for Montreal in the years 1976 and 1981.

Control variables: Sex and age.

4. SAMPLING GROUP SIZE AND RELIABILITY FACTORS

Although the BBM Canada-wide sampling group is quite large (over 42,000 in 1981), its segmentation through the application of the numerous variables produces sampling groups of considerably more modest proportions. This is particularly true when we come to examine the francophone population outside Quebec. The appendix at the end of this report gives the sampling group sizes in 1976 and 1981, respectively, for each of the regions surveyed.

As is true for any survey based on random sampling, accuracy of estimation increases with the size of the sampling group. The method used to calculate the margin of error varies according to whether we are dealing with percentage shares, such as viewership ratings, or parametric measurements, as is the case for average weekly viewing time.

For percentages, BBM applies a standard statistical formula (see appendix) to determine the level of confidence for sampling groups of various sizes; the same formula can be used on our audience share data.

The reliability factor for weekly viewing time (both population and audience figures) can be calculated using the following formula, which is designed to test a 5 per cent reliability margin of confidence.

Observed viewing hours:

$$1.96 \left( \frac{300}{n} \right) \text{ Actual viewing hours} \quad \text{Observed viewing hours} \quad + \quad 1.96 \left( \frac{300}{n} \right)$$

## RESULTS

### 1. PROFILE 1A: LANGUAGE AND CABLE DISTRIBUTION

We concentrated first on the analysis of regional differences, taking into account simultaneously the two variables most likely to be associated with ENG viewing: namely **official language** (whether the respondent is unilingual or bilingual) and **cable distribution** (whether the respondent is a cable subscriber).

Since the characteristics of a regional sub-population can be fully understood only from a global viewpoint, profile 1A is devoted first to a description of **two major sub-groups - the region of greater Montreal and the whole of Quebec except for Montreal**. Likewise, we thought it advisable to include a description of the population as a whole before our own analysis of language and cable distribution variables. Consequently the analysis goes from the general to the particular, beginning with large groups and working towards a more and more detailed description of the situation.

#### 1.1 General viewing

##### Changes in viewing habits in Montreal

Let us first of all consider general television viewing. In **Montreal, the total amount of television watched decreased from 1976 to 1981, dropping from 24.1 hours/week to 23 hours/week**. This decline in viewing time is the product of a substantial drop in the time spent watching FR stations and a rise in ENG viewing.

As regards to viewing time, the **English stations' share of viewing time rose from 14.2 per cent in 1976 to 20.5 per cent in 1981, a yearly increase of 1 per cent per year (Figure 1)**.

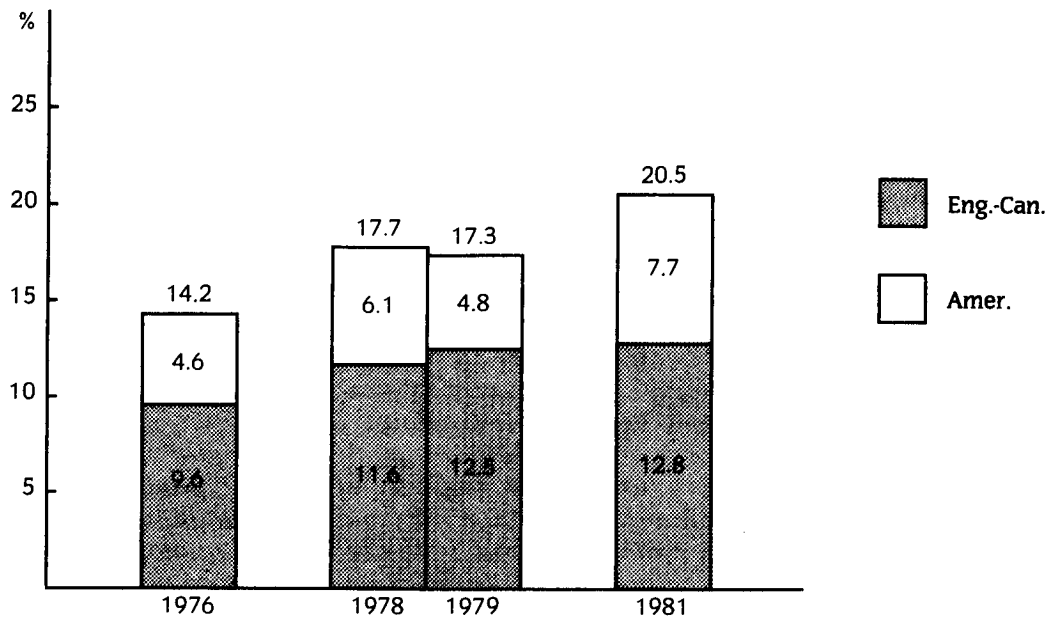
Although EC stations were still watched the most, **AM viewing increased at the same rate as that of EC channels**.

The growing interest in ENG viewing can be attributed to two phenomena. Mainly, **the size of the audience (the number of ENG viewers increased)**. EC viewership rose from 52 per cent to 61 per cent of the population, and the number who watched AM stations burgeoned from 11 per cent to 35 per cent.

Furthermore, **not only did the ENG audience share improve, but also the length of time this audience spent watching ENG television went up slightly**. By 1981, viewers of EC television were watching 30 minutes longer among AM viewers, the increase seems to be slower - 12 minutes from 1976 to 1981.



**FIGURE 1**  
**Montreal: non-segmented population**  
**Changes in percentage of English-language viewing**



### Changes in viewing habits in the rest of Quebec

The television viewing habits of Quebecers in general are quite different from those of Montrealers. **Contrary to what happened in Montreal, total weekly television viewing rose from 24.9 hours in 1976 to 26 hours in 1981**, a three-hour margin over the weekly total of the average Montrealer in 1981.

Outside Montreal, FR viewing remains at a constant level, while EC and AM viewing is increasing at about the same rate. Moreover, ENG viewing has a smaller share of total viewing time than it does in Montreal and is going up more slowly. This share has grown from 5.7 per cent to 9.1 per cent an increase of only 3.4 per cent in six years, as compared with a 6.3 per cent in Montreal (Figure 2).

**As in Montreal, however, the growth in ENG television viewership is a combination of an increase in the number of persons watching EC and AM stations and a rise in the amount of ENG television watched by this audience.** Indeed, the share of the audience that chooses ENG programming went up by 8 per cent, while viewing measured in terms of hours/audience rose by approximately half an hour.

Montreal and the rest of Quebec differ primarily, therefore, in terms of FR viewing which has decreased in Montreal but has remained constant elsewhere in Quebec. Changes in ENG viewing are similar throughout Quebec, although they have occurred more rapidly in Montreal.

### 1.2 Bilingualism and viewing of ENG television

Although a description of the total population provides us with a general outline of viewing trends, we must go beyond this level of analysis. Other variables come into play in determining the amount of ENG television watched by francophones; one of these variables is a viewer's knowledge of English.

#### Montreal

There are distinct differences between the ENG viewing habits of unilingual and bilingual francophones. **In 1981, Montrealers who stated they were unilingual devoted 9.5 per cent of their viewing time to ENG stations, as compared with 31.9 per cent for those who said they were bilingual. Moreover, the gap between unilingual viewers and bilingual viewers continues to widen:** while the former increased their ENG viewing time by less than 3 per cent between 1976 and 1981, the latter watched 8 per cent more ENG television after the same time span. This difference between unilingual and bilingual viewers is mainly due to the evolution of FR viewing (Figure 3).

**FIGURE 2**  
**Rest of Quebec: non-segmented population**  
**Changes in percentage of English-language viewing**

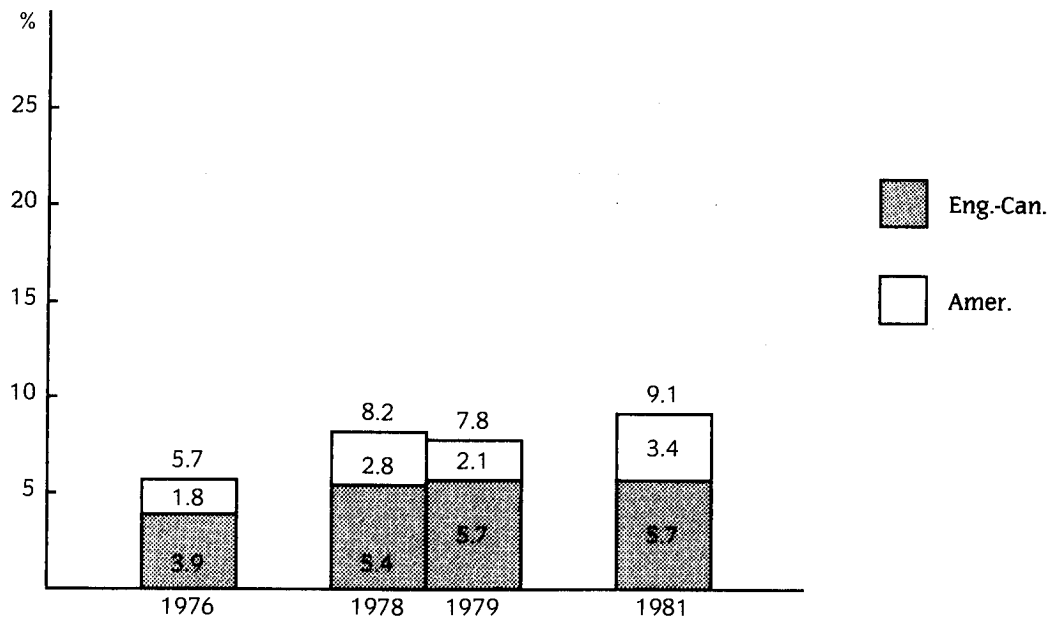


FIGURE 3

Montreal: unilingual and bilingual viewers  
Changes in percentage of English-language viewing

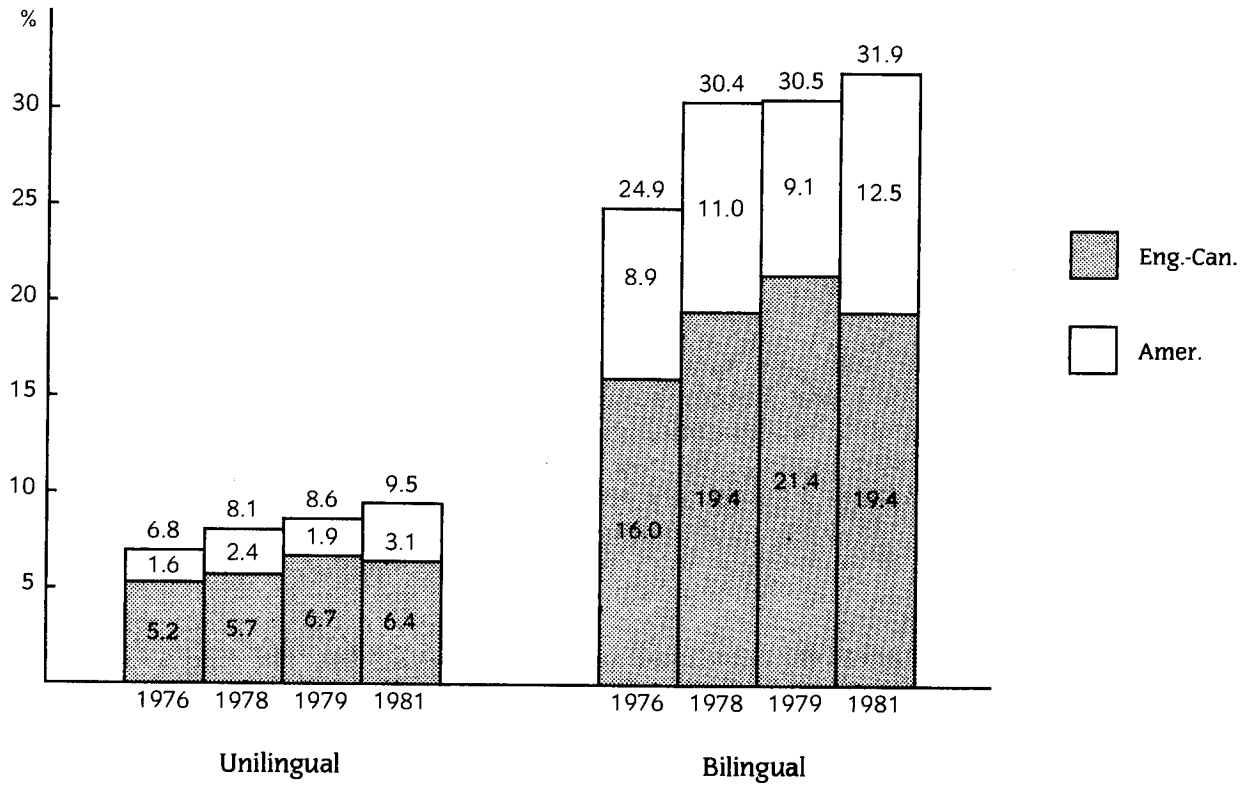
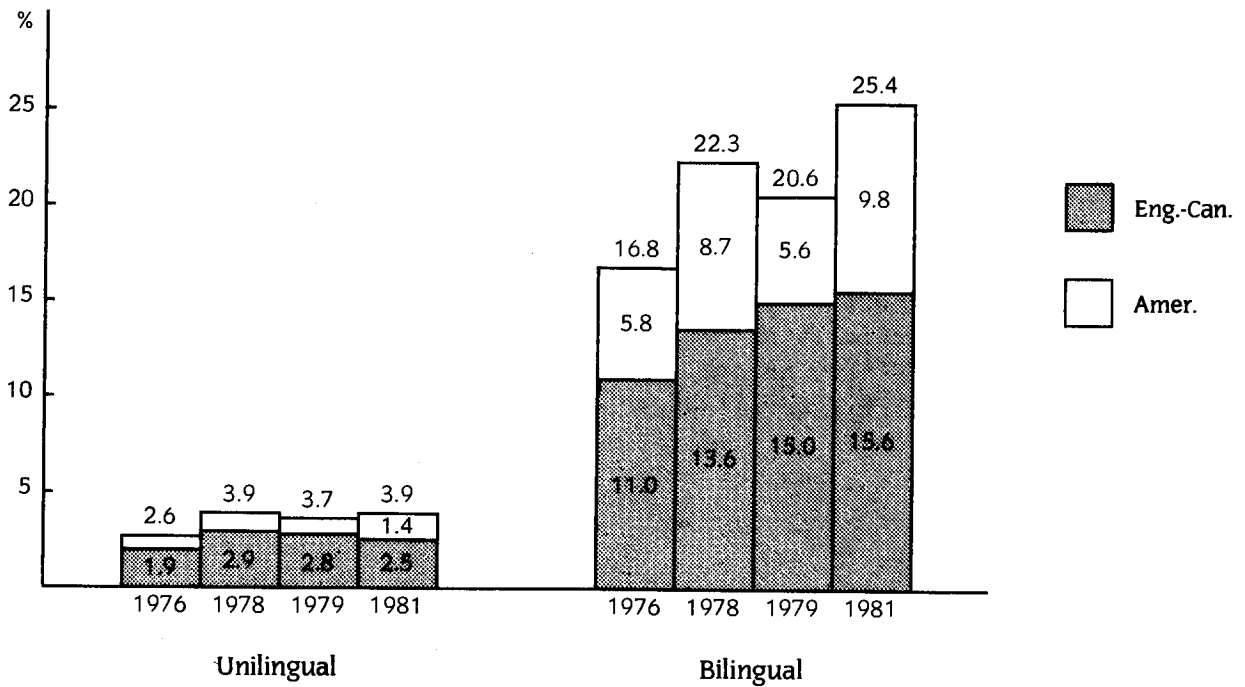


FIGURE 4

Rest of Quebec: unilingual and bilingual viewers  
Changes in percentage of English-language viewing



Although it is on the decline for both groups, **the number of hours per week devoted to watching FR television decreased more significantly among bilingual viewers than among unilingual viewers** (a drop of 2.7 hours per week vs. 1.4 hours per week).

Furthermore, viewership has grown similarly in both groups - a rise of about 5 per cent in the number of people who tune in to EC stations and of about 16 per cent in the number watching AM stations. Both language groups tend to watch more EC than AM television; among bilingual viewers the rate reached 76 per cent.

#### Rest of Quebec

**As in Montreal, the gap between unilingual and bilingual viewers is substantial: in 1981 the latter group spent 25.4 per cent of its viewing time watching ENG television, while the unilingual group spent just 3.9 per cent. Here again, the gap tends to widen over time.** The increase for the unilingual group was only 1.3 per cent, compared with 8.6 per cent for the bilingual audience. Unilingual viewers residing outside the Montreal area seem to have little interest in ENG television (Figure 4).

EC viewing is greater than that of AM stations, but the two are increasing at the same rate, both in percentage of viewing time and in audience share. If total viewing time is considered, it is again clear that the evolution of FR viewing time is what distinguishes the two groups. **Unilingual viewers** are devoting slightly more time to watching FR television, whereas bilingual viewers are watching less.

In the whole of Quebec, then, only unilingual viewers living outside Montreal are watching more FR television; all other groups are watching less.

Yet ENG viewing, whether it be of EC or AM origin, is increasing at the same rate in both regions. This is especially true of the bilingual group, which devotes up to 30 per cent of its viewing time to ENG television.

#### 1.3 Cable distribution and viewing of ENG television

If bilingualism encourages people to watch ENG television stations, cable subscription generally provides the viewer with greater access to such programming, especially AM stations. Studying this latter variable is all the more interesting as cable service is reaching a larger and larger proportion of the population, which we shall see further on.

### Montreal

In 1981, Montrealers with cable subscriptions watched ENG programming 26.1 per cent of the time, whereas the rate for non-subscribers was 15.1 per cent. This difference is attributable almost solely, however, to viewing of AM stations. Indeed, subscribers and non-subscribers in Montreal differ little in the amount of EC television they watch, but subscribers watch far more AM television: 12.6 per cent compared with 2.9 per cent. The same thing applies to audience size. Only 12.7 per cent of non-subscribers tune in to AM stations, although 56.5 per cent watch EC television. In contrast to this, more than 60 per cent of cable subscribers watch both AM and FR stations. With regard to viewing time, subscribers and non-subscribers devote the same number of hours/week to FR stations, but **subscribers watch much more ENG television (6.4 hours vs. 3.2 hours) and especially AM stations (3.1 hours vs. 0.6 hours)** (Figure 5).

Over time, ENG and FR viewing have been growing at the same rate, irrespective of cable subscription. **Cable is thus a factor in ENG viewing, but the gap between cable subscribers and non-subscribers does not seem to be widening with time.**

### Rest of Quebec

As in Montreal, television viewers in the rest of Quebec devote a larger part of their viewing time to ENG stations when they have cable service: 13.3 per cent for subscribers as compared with 6.4 per cent for non-subscribers. However, although the Montreal cable audiences for AM and EC television are almost the same size, elsewhere in the province the EC share of the cable audience is 9 per cent higher than the AM share (Figure 6).

**To summarize, cable service seems to be a greater factor in determining how much EC television Quebecers residing outside Montreal will watch.** No doubt this is because several ENG stations are easy to pick up without cable in the Montreal area, whereas the situation differs across the province.

Furthermore, although FR viewing in Montreal evolved similarly among cable subscribers and non-subscribers, **in the rest of Quebec cable service seems to be linked to less interest in FR programs:** non-subscribers watched FR television for 24.6 hours/week in 1981, subscribers only 22.4 hours.

Over the long term, the viewing preferences of cable subscribers and non-subscribers evolve in approximately the same fashion. FR viewing remains constant, while ENG viewing is on the rise; the rate of increase of AM television viewing is slightly higher for those with cable (42 minutes vs. 12 minutes).

FIGURE 5

Montreal: cable subscribers and non-subscribers  
Changes in percentage of English-language viewing

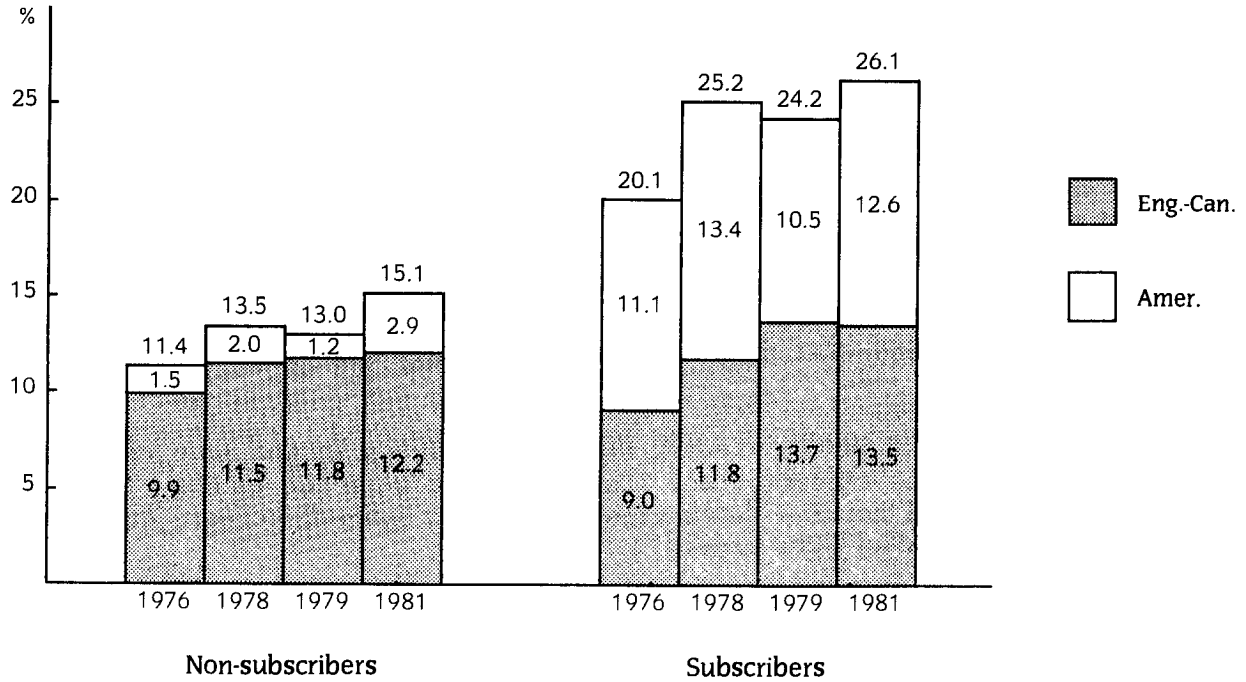
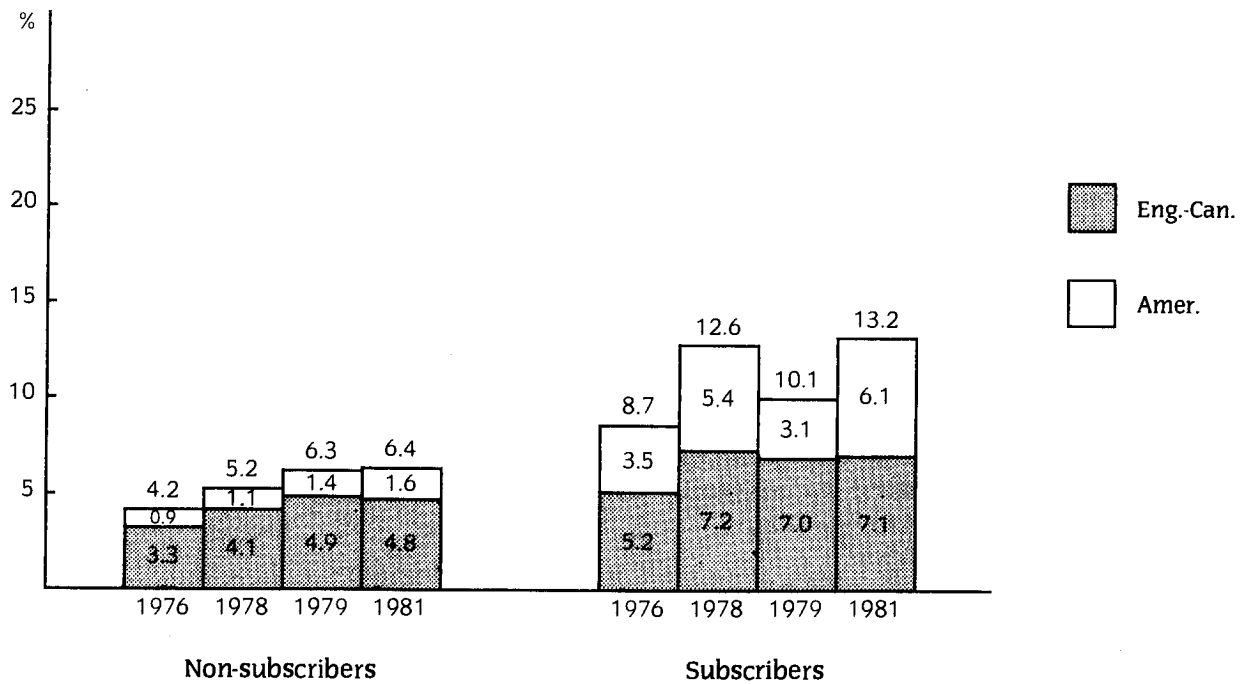


FIGURE 6

Rest of Quebec: cable subscribers and non-subscribers  
Changes in percentage of English-language viewing



All things considered, it seems that **cable subscription** is more closely linked to an increase in ENG viewing (especially AM) than to a decrease in FR viewing, although cable subscribers in the rest of Quebec watch less FR television. In contrast, cable service is associated with few long-term changes in viewing habits. **Bilingualism** is related to other effects: a very sharp decline in FR viewing and a corresponding rise in ENG viewing. The gap between unilingual and bilingual viewers is also widening more and more as time goes by.

#### 1.4 Interaction between language and cable distribution

As shown by the above data, bilingualism and cable subscription are both linked to an increase in ENG television viewing. Taken separately, each of these two variables is very closely related to ENG viewing habits. It is quite possible, however, that cable subscription does not have the same effect on the viewing habits of unilingual persons as it has on those of bilingual viewers. This is why studying the interaction between these two variables should enable us to analyze the results more closely.

Unfortunately, interpreting results becomes more difficult when we increase the number of variables being simultaneously considered. So to clarify matters we have included Figure 7, which illustrates the changes in viewing percentages in Montreal as a function of both cable subscription and language.

##### Montreal

Table 1 shows quite clearly that language and cable service act upon each other. **In 1981, as in 1976, the cable seemed to be a more important factor in determining the viewing habits of bilingual viewers than those of unilingual viewers.** In the unilingual group, the cable has a limited effect on the total amount of ENG viewing. With the bilingual group, in contrast, AM viewing increases markedly with cable subscription, while EC viewing remains just about constant.

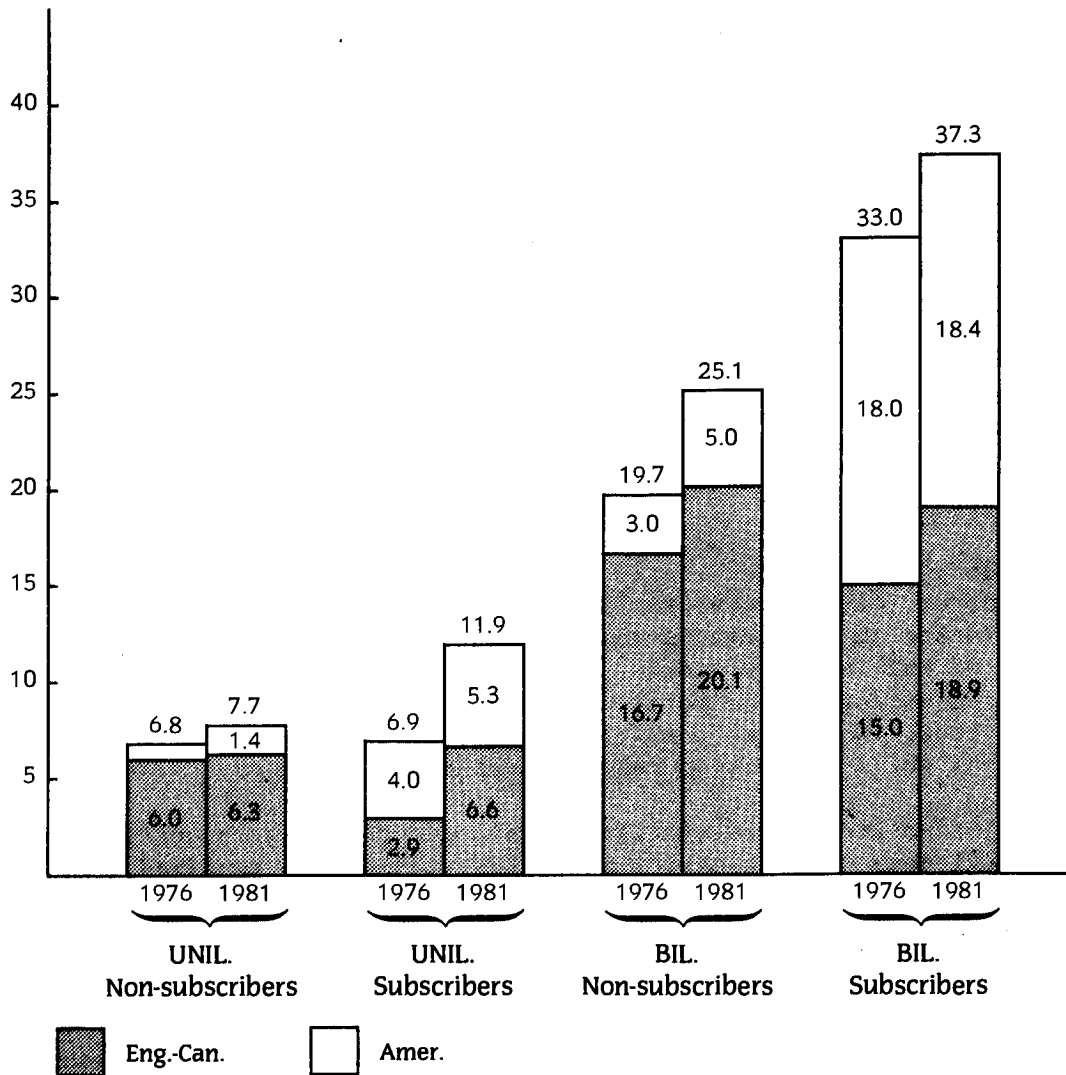
Long-term trends are similar for all groups, with the exception of unilingual viewers without cable, whose ENG viewing has remained constant (Figure 7).

There is no evidence of interaction between language and cable with regard to the audience share held by EC stations: both unilingual and bilingual viewers watch very little more EC programming when they have cable service. In contrast, the size of the AM television viewing audience is very sensitive to the interaction: in 1981, 34 per cent more unilingual subscribers than non-subscribers watched AM channels, and 58 per cent more bilingual subscribers than non-subscribers (74 per cent vs. 16 per cent) tuned into AM stations.



FIGURE 7

Percentage of viewing time devoted to English-Canadian and American stations:  
interaction between language and cable distribution, Montreal, 1976-1981



Cable subscription is also linked to an increase in total viewing time among both unilingual and bilingual television viewers (Table 1). Yet while cable service encourages unilingual viewers to increase their consumption of both FR and ENG programming, bilingual viewers who got cable service only watch more ENG broadcasts.

In terms of evolving trends, it appears that the variables of cable and language are relatively independent. For both unilingual and bilingual viewers, the total time that cable subscribers spend watching television remains almost constant, the increase in ENG viewing in a way offsetting the decrease in FR viewing. With non-subscribers, total viewing time is declining.

Table 1

Viewing time in Montreal: situation in 1981 and change since 1976, by language and cable service

	<u>UNILINGUAL</u>						<u>BILINGUAL</u>					
	Non-subscribers			Subscribers			Non-subscribers			Subscriber		
	Fr.	Eng.	Tot.	Fr.	Eng.	Tot.	Fr.	Eng.	Tot.	Fr.	Eng.	Tot.
1981	20.4	1.7	22.1	22.0	2.9	24.9	15.8	5.2	21.0	15.3	9.1	24.4
Change since 1976	-1.7	-0.7	-1.8	-1.2	+1.2	0.0	-3.2	+0.5	-2.0	-1.5	+0.8	-0.7

Rest of Quebec

In the rest of Quebec, the overall picture is the same as in the Montreal area: for bilingual viewers, cable service is very clearly linked to an increase in the percentage of viewing time devoted to AM stations, and unilingual subscribers become slightly more interested in AM television. As for audience size, with both unilingual and bilingual viewers **cable service is more closely linked to the growth of the AM viewing audience than to the EC audience.** In contrast, the increase in the size of the EC viewing audience remains higher in the rest of Quebec than in Montreal.

Furthermore, the interaction between cable and language does not have the same effect on total viewing time in the rest of Quebec (Table 2). Whereas in Montreal the cable can be linked to an increase in viewing time for both unilingual and bilingual television viewers, this is not the case in the rest of Quebec. In 1981, unilingual viewers with or without cable watched virtually the same amount of television, whereas bilingual viewers with cable watched less television than those viewers without cable.

Table 2

Viewing time in the rest of Quebec: situation in 1981 and change since 1976 by language and cable service

	<u>UNILINGUAL</u>						<u>BILINGUAL</u>					
	Non-subscribers			Subscribers			Non-subscribers			Subscribers		
	Fr.	Eng.	Tot.	Fr.	Eng.	Tot.	Fr.	Eng.	Tot.	Fr.	Eng.	Tot.
1981	25.6	0.6	26.2	24.9	1.6	26.5	20.3	5.7	26.0	17.3	6.9	24.2
Change since 1976	0.8	0.0	0.8	0.5	0.6	1.1	-0.2	2.5	2.3	-0.7	2.3	1.6

This decline in total viewing time is caused by a very substantial drop in FR viewing, together with a rise in ENG viewing. It should be recalled that in Montreal the cable did not have an influence on the amount of FR television watched by bilingual viewers.

Over the long term, the variables of cable and language do not interact: the amount of television watched by bilingual viewers, whether or not they had cable service, increased more significantly between 1976 and 1981 than did the amount watched by unilingual viewers.

#### 1.5 Sex, age and number of persons per household

In this section we shall summarize our analysis of three moderating variables: sex, age, and number of persons per household. As the variables of region, cable distribution, and language were also included in the analysis, we shall for the sake of simplicity describe only the major differences noted for each of the moderating variables.

##### 1.5.1 Sex

###### Montreal

Broadly speaking, women watch more television than men. Between 1976 and 1981, only women with cable increased their total viewing time. Men and women watch quite similar proportions of ENG programming, with the exception, once again, of bilingual women cable subscribers, who spent 7 per cent more of their viewing time watching ENG stations.

The size of the viewing audience for EC television is comparable to that for AM television irrespective of the sex of the viewer, with one exception: AM stations are watched by more unilingual men without cable than by their female counterparts, (19 per cent vs. 5 per cent). As a general trend, ENG viewing seems to be rising slightly faster for men (Table 3).

#### Rest of Quebec

In the rest of Quebec, the situation is very similar to that in Montreal: higher total viewing for women, and higher ENG viewing only for bilingual women who are cable subscribers. Furthermore, changes in viewing habits over time seem in this case to be independent of sex.

What stands out, then, is that in Montreal, as in the rest of Quebec, there is little difference between the ENG viewing habits of men and women. **However, cable subscribing seems to have a stronger effect on the amount of ENG television that women watch, especially bilingual women.**

#### 1.5.2 Age

With regard to the variables of **age** and **number of persons per household**, our analysis dealt with the whole of Quebec, Montreal included.

We found that **the total amount of television watched increases with the age of the viewer.** Analysis of ENG viewing habits reveals that in this case both audience size and total viewing time decline with the age of the viewer. This means that **young people devote a larger part of their viewing time to ENG television and that these stations are watched by a larger proportion of young people.**

In addition, an increase in ENG viewing over time also seems to be related to age. Young people, except unilingual viewers without cable, seem to be changing more rapidly to this type of viewing. This tendency is even more prominent among unilingual viewers as regards the market share of ENG stations. Young unilingual viewers, less sensitive than their elders to the linguistic barrier, are more receptive to ENG viewing (Table 4).

#### 1.5.3 Number of persons per household

Generally speaking, **total viewing time decreases as the number of persons in the home increases.**

Table 3

Changes in viewing time in Montreal between 1976 and 1981,  
by sex, official language, and cable distribution

Group	Sex		FR	EC	AM	Total ENG	Total
Unilingual Non- subscribers	Men	1976	20.6	1.5	0.2	1.7	22.3
		1981	<u>18.0</u>	<u>1.4</u>	<u>0.7</u>	<u>2.1</u>	<u>20.1</u>
			-2.6	-0.1	0.5	0.4	-2.2
	Women	1976	23.1	1.4	0.1	1.5	24.6
		1981	<u>21.7</u>	<u>1.4</u>	<u>0.1</u>	<u>1.5</u>	<u>23.2</u>
			-1.4	0.0	0.0	0.0	-1.4
Unilingual Subscribers	Men	1976	21.5	0.5	1.0	1.5	23.0
		1981	<u>19.3</u>	<u>1.2</u>	<u>1.3</u>	<u>2.5</u>	<u>21.8</u>
			-2.2	0.7	0.3	1.0	-1.2
	Women	1976	24.4	0.9	1.0	1.9	26.3
		1981	<u>23.6</u>	<u>2.0</u>	<u>1.4</u>	<u>3.4</u>	<u>27.0</u>
			-0.8	1.1	0.4	1.5	0.7
Bilingual Non- subscribers	Men	1976	18.1	3.4	0.5	3.9	22.0
		1981	<u>14.9</u>	<u>4.2</u>	<u>1.1</u>	<u>5.3</u>	<u>20.2</u>
			-3.2	0.8	0.6	1.4	-1.8
	Women	1976	20.1	4.7	1.0	5.7	25.8
		1981	<u>16.7</u>	<u>4.3</u>	<u>1.0</u>	<u>5.3</u>	<u>22.0</u>
			-3.4	-0.4	0.0	-0.4	-3.8
Bilingual Subscribers	Men	1976	17.9	3.7	4.2	7.9	25.8
		1981	<u>15.5</u>	<u>4.0</u>	<u>4.1</u>	<u>8.1</u>	<u>23.6</u>
			-2.4	0.3	-0.1	0.2	-2.2
	Women	1976	15.1	3.9	5.1	9.0	24.1
		1981	<u>14.9</u>	<u>5.4</u>	<u>5.0</u>	<u>10.4</u>	<u>25.3</u>
			-0.2	1.5	-0.1	1.4	1.2

Table 4

Changes in percentages of English-language viewing and share in English-language viewing audience according to age, language, and cable distribution, for Quebec as a whole

		<u>UNILINGUAL</u>						<u>BILINGUES</u>					
		Non-subscribers			Subscribers			Non-subscribers			Subscribers		
		76	81		76	81		76	81		76	81	
Viewing % ENG	2-11	6.5	6.8	0.3	7.2	10.3	3.1	*	*	*	*	*	*
	12-17	3.3	4.2	0.9	5.2	10.8	5.6	17.4	27.0	9.6	24.1	35.7	11.6
	18,24	2.0	4.6	2.6	3.1	9.6	6.5	13.9	23.6	9.7	24.6	37.6	13.0
	25-34	2.9	3.4	0.5	4.6	5.5	0.9	15.8	23.7	7.9	30.1	33.2	3.1
	35-49	2.1	2.9	0.8	5.4	7.3	1.9	17.3	24.3	7.0	20.1	37.4	17.3
	50+	3.6	2.6	-1.0	3.4	5.9	2.5	18.4	21.0	2.6	27.8	26.2	-1.6
Audience share EC	2-11	38	34	-4	34	43	9	*	*	*	*	*	*
	12-17	23	29	6	34	47	13	58	72	14	67	75	8
	18-24	19	30	11	24	39	15	54	65	11	54	66	12
	24-34	24	28	4	26	26	6	50	65	15	66	74	8
	35-49	19	18	-1	28	34	6	55	61	6	59	69	10
	50+	20	19	-1	23	35	12	58	57	-1	68	76	8
Audience share AM	2-11	6	12	6	23	37	14	*	*	*	*	*	*
	12-17	4	11	7	23	37	14	22	25	3	52	57	5
	18-24	3	5	2	14	32	18	15	23	8	53	64	11
	25-34	2	6	4	18	27	9	13	20	7	55	71	16
	35-49	3	6	3	18	23	5	13	16	3	46	65	19
	50+	3	3	0	24	24	0	14	16	2	61	62	1

ENG viewing in particular does not seem to be related in any specific way to the number of persons in a household without cable, but it increases with the number of persons in a household with cable service. This phenomenon seems, however, to be limited in scope. Finally, slightly more unilingual viewers are watching some ENG television. On the whole, the number of persons in the home seems to have a decided influence on total viewing time, but little influence on the amount of ENG viewing.

## 2. PROFILE 1B: REGIONS

Our analysis of viewing habits in the two large regions -- the Montreal area and the rest of Quebec -- enabled us to assess the significance of language and cable subscription in determining ENG viewing. We know that levels of both bilingualism and cable distribution vary from one region to the next. Consequently, we can expect to find different viewing patterns and different changes in viewing habits depending on the region being studied.

It is interesting to pick out the overall regional differences (unsegmented population) for the eleven indicated regions and for rural Quebec (all of Quebec except the province's eight urban areas) (see Figure 8).

Nevertheless, in this chapter we shall not undertake a detailed analysis of the regions according to population segments, such as language interaction with cable subscription.

Given that the sample size in some regions, even for an unsegmented population, is not sufficient to guarantee the statistical reliability of our results, we must be very careful when interpreting the data. Analyzing the regions nevertheless enables us to advance certain hypotheses, although research specific to each region would be needed to verify them.

For this reason, we have retained only one measurement (hours/population), which allows us to come up with a rough idea of the viewing changes for each region. With this measurement we can trace increases in both total viewing time and market share. It enables us to discover whether one phenomenon or the other is occurring, but does not specify which one it is. **Thus we are dealing only with a cursory analysis that reveals the presence or absence of a regional phenomenon.**

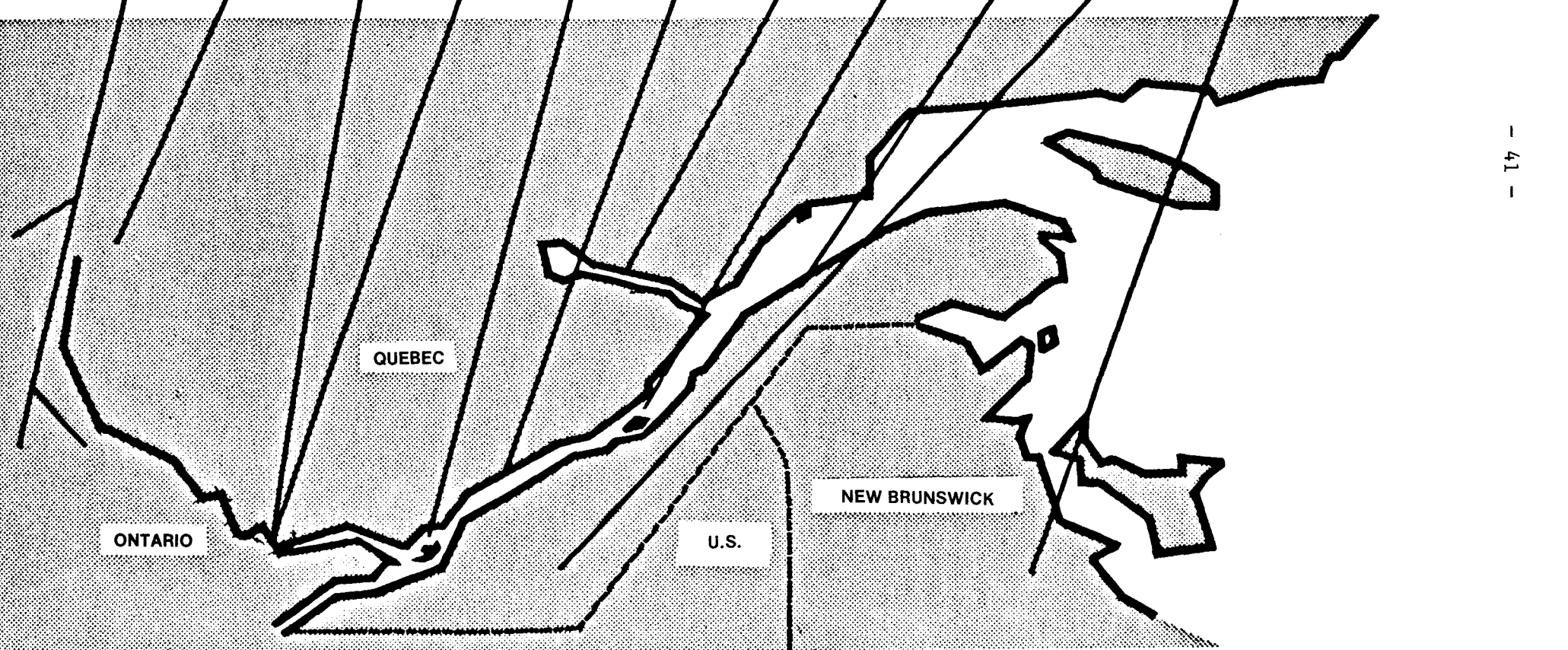
### 2.1 Total viewing

Eight of eleven regions show an increase of at least one hour in total viewing time. In Montreal and in Sudbury/Timmins/North Bay, a drop in viewing time was recorded, while no change was registered in Quebec

FIGURE 8

CHANGES IN WEEKLY VIEWING HABITS FOR FRENCH-SPEAKING VIEWERS AS A WHOLE ACCORDING TO REGION (1976-1981)

	Sudbury Timmins North Bay	Rouyn Noranda	Ottawa	Hull	Montreal	Trois-Rivières	Chicoutimi	Quebec City	Rimouski	Sherbrooke	Moncton	Rural Q.	
<b>1976</b>	FR. 5.8	21.9	4.7	14.6	20.7	23.1	24.8	22.2	23.1	19.7	3.4	24.2	h./week
	E.C. 18.2	2.8	8.7	4.9	2.3	.9	.0	1.2	—	1.1	16.2	0.6	h./week
	AM. .1	...	2.1	.4	1.1	.5	.0	.5	.0	2.4	.4	0.4	h./week
<b>1981</b>	FR. 5.1	24.2	10.3	13.7	18.3	24.2	27.5	21.2	26.9	22.4	3.6	24.6	h./week
	E.C. 12.7	1.4	8.8	6.3	2.9	1.5	.6	1.2	.7	1.2	20.5	1.4	h./week
	AM. 4.9	.2	2.0	2.0	1.8	1.4	.3	1.1	.5	1.9	1.8	0.7	h./week



HOURS / POPULATION



City. As these three regions are the most highly populated areas under study, this decline in viewing may well be a phenomenon that will spread to less urbanized areas as time goes by.

## 2.2 FR and ENG viewing

When total viewing is divided according to what type of stations are watched, it is easier to understand the influence of certain regional factors in determining changes in viewing preferences. We are therefore going to take a quick look at trends in each of the regions, starting with those outside Quebec.

### Sudbury/Timmins/North Bay

In the region of Sudbury/Timmins/North Bay, EC television accounts for the most viewing time, even though this study deals only with people who claim that French is the language they speak most often at home. Nevertheless, EC viewing declined considerably (by 5.5 hours per week) between 1976 and 1981; only AM viewing rose (by 4.8 hours) over the same period. Two factors might, in part at least, explain this phenomenon. The fact that the region is located in a largely English-speaking province favours a high level of ENG viewing. Second, the large increase in the number of cable subscribers (the greatest of all the regions studied<sup>1</sup>) may explain the substantial rise in AM viewing.

### Moncton

As the sample for this region was very limited in 1976, it is difficult to state anything about changes in viewing habits. In any case, EC stations account for the major part of television viewing in the region.

### Ottawa

Although in 1976 Ottawa-area francophones devoted the major part of their viewing time to EC stations, they spent more time in 1981 watching FR television. This switch seems due to the significant rise in FR viewing between 1976 and 1981 -- which can be explained, in part at least, by the fact that a new FR television station began operating in 1978.

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1. Seeing that it is difficult to make the regions served by cable correspond exactly to the BBM survey regions, we shall not give any exact percentage of cable subscription for each of the regions. Our estimates of increases in cable subscription are based on various sources of information, including Nielsen, BBM, and the Matthews reports.

Furthermore, the proximity of Quebec and the unique make-up of the national capital population may explain the high level of FR viewing, as well as the large amount of EC viewing, which accounts for almost 50 per cent of total viewing time.

#### Hull

As in all the regions of Quebec, viewers in Hull watch mostly FR stations. But viewing of ENG stations, especially EC channels is greater in Hull than in all the other Quebec regions that we studied.

Furthermore, whereas French viewing is, if not on the decline, then at least constant, English viewing is on the rise (3 hours more in 1981). The proximity of the English-speaking community may work in favour of this kind of change, especially since the level of cable subscription, which gives greater access to ENG stations, is among the highest in Quebec.

#### Sherbrooke

Analysis according to geographic location allows us to advance an hypothesis concerning a phenomenon specific to Sherbrooke. This is the only region where the amount of time devoted to AM viewing is higher than that given to EC stations. The proximity of the United States probably makes it easier for Sudbury viewers to pick up American stations and this might explain the phenomenon. EC viewing was fairly constant, and even slightly on the decline, from 1976 to 1981; however, as in the majority of Quebec regions, FR viewing is increasing.

#### Rouyn-Noranda

In comparison with the other regions of Quebec, Rouyn-Noranda can be characterized by a 1.4 hour decrease, between 1976 and 1981, in viewing of EC stations. This reduction may be partly due to the arrival of two new FR channels.

However, the increase in FR viewing appears to be comparable to increases in other Quebec regions.

#### Rimouski

**Rimouski proved to have the highest 1976-81 increase in FR viewing of all the Quebec regions studied**, perhaps because a new FR station began broadcasting there in 1977. ENG viewing, which was practically nil in 1976, began to claim a share of the market in 1981. A major expansion of cable distribution may in part explain this change.

### Chicoutimi

The viewing pattern in Chicoutimi is much the same as that in Rimouski, except that the increase in FR viewing was not as pronounced.

### Trois-Rivières

FR viewing also rose here, but is significantly less than in the two regions discussed above. All three regions are similar in terms of their growth in ENG viewing over the 1976-81 period, although Trois-Rivières consistently showed higher viewing levels than the other two areas. The high level of cable penetration in Trois-Rivières since 1976 would constitute a likely explanation for this difference.

### Quebec City

Changes in viewing habits in Quebec City are very similar to those in Montreal, which have already been discussed.

To summarize, a drop in FR viewing is accompanied by a moderately higher interest in ENG programming. It is interesting to note that FR viewing only declines in decreasing order of importance in Montreal, Quebec City and Hull, which are the most urbanized regions studied. With this in mind, the analysis of viewing changes in what we have called rural Quebec (all of Quebec except the eight specific urban areas) may be of particular interest.

### Rural Quebec

**This sector recorded the least change in viewing habits between 1976 and 1981.** FR viewing remained constant, and the increase in ENG viewing is average when compared with all the other regions. The apparent stability of FR viewing may be due to either three consistency in viewing habits or the effect opposing trends in different regions. It is certainly possible that rural regions close to urban centres evolve in a fashion quite different from that of more isolated rural regions. Nevertheless, the possibility that rural viewing habits simply remained stable cannot be discarded without more thorough study.

In carrying out our region-by-region analysis, we discovered four factors that could help explain certain differences among the regions:

- location within or outside Quebec;
- proximity to another culture;
- possibility of tuning in new stations (directly or by cable);
- degree of urbanization of the region.

In the three regions outside Quebec (Sudbury/Timmins/North Bay, Moncton, and Ottawa) Francophones spend most of their viewing time watching ENG television. In Ottawa, however, the proximity of Quebec seems to strongly favour FR viewing, which accounts for almost half of all television watched.

The opposite factor -- the proximity of an English-speaking population -- seems to favour a higher level of ENG viewing; this is especially evident in Hull, but also occurs in Sherbrooke and Rouyn.

An increase in the numbers of cable subscribers between 1976 and 1981 seems to favour AM viewing, especially in regions where there is already a high level of EC viewing (in Sudbury/Timmins/North Bay and in Hull). Following the same principle, the establishment of a new FR station seems to encourage FR viewing, as occurred in Rimouski, Rouyn and particularly Ottawa, where in 1976 the major part of viewing time was not devoted to FR television.

It would be difficult to say that a real shift in viewing took place between 1976 and 1981 in most of the regions, since what actually occurred was a general increase in total viewing time that was divided between FR and ENG stations. However, **three of the most heavily populated regions studied (Montreal, Quebec City and Sudbury/Timmins/North Bay) do indeed show signs of a shift.** Although the trend seems to be less pronounced, Hull too shows a fairly similar pattern. In all cases, the most popular type of viewing is yielding ground to the other two types. In Sudbury/Timmins/North Bay, for instance, EC viewing time is decreasing while AM stations become more popular. In the other regions, FR viewing is falling, to the advantage of ENG viewing. Only in Montreal and Sudbury/Timmins/North Bay is the drop in the main type of viewing appreciably greater than the rise in the two other types, producing in a decline in total viewing time (Figure 9).

It may seem surprising that we have not referred to the level of bilingualism as a factor in explaining regional differences. The lack of precise data on the level of bilingualism of francophones (according to home language) in each region prevented us from analyzing this factor, except for the comparison between the unilingual and bilingual populations in the two large regions of Montreal and the rest of Quebec.

### 3. PROFILE 2: VIEWING OF ENG STATIONS BY QUINTILE OF TELEVISION CONSUMPTION

It would be reasonable to believe that viewers who watch a great deal of television differ from light viewers not only in the amount they watch, but also in how they divide their viewing time among the three viewing categories. We therefore decided to study viewing profiles according to the quintiles defined by the BBM for the Canadian population as a whole. In this chapter, we will examine two regions: the Montreal area and the rest of Quebec.

Figure 9

Changes in number of viewing hours/population  
by region (1976-1981)\*

	FR viewing	ENG viewing	Total viewing
Increase	Rouyn	Moncton	Moncton
	Ottawa	Hull	Ottawa
	Trois-Rivières	Trois-Rivières	Hull
	Chicoutimi	Rimouski	Trois-Rivières
	Rimouski	Montreal	Rouyn
	Sherbrooke	Rural Quebec	Sherbrooke
Decrease	Montreal	Rouyn	Sudbury/ Timmins/ North Bay
	Quebec City		Montreal
Constant	Sudbury/ Timmins/ North Bay	Sudbury/ Timmins/ North Bay	Quebec City
	Moncton	Ottawa	
	Rural Quebec	Sherbrooke	
		Chicoutimi	
		Quebec City	

\* For the purpose of this table, changes of less than an hour have been taken to reflect constant viewing habits.

### 3.1 Comparison of quintiles

It is immediately evident that the distribution of quintiles in the rest of Quebec diverges sharply from that for Montreal and for Canada: there are thus more heavy viewers (quintile 5) and fewer light viewers (quintile 1) in the rest of Quebec than in Montreal. Yet within each quintile the number of weekly viewing hours is virtually the same for both regions. Thus the Montreal area has fewer heavy viewers than the rest of Quebec, but a heavy viewer in Montreal watches just as much television as a heavy viewer in the rest of Quebec.

If the share of ENG viewing is studied according to the different quintiles, a number of interesting trends can be noticed. It can be seen, naturally, that the **percentage of viewing** time devoted to ENG stations is generally higher in Montreal (13 per cent) than in the rest of Quebec (6 per cent). Yet **this percentage of ENG viewing does not vary appreciably (by less than 2 per cent in general) from one quintile to the next in each of the regions.** Heavy and light viewers in a given region watch similar proportions of FR and ENG programming.

It is interesting to note that this comparable spread across all the quintiles results in considerable differences between quintiles in terms of number of hours/population. In Montreal in 1981, for example, the fifth quintile's 20 per cent of ENG viewing represents 9.4 hours of ENG television, in other words more than the total number of hours watched by those in the first quintile.

The size of the viewing audience also adds affects the results. For all regions and all years, the size of the ENG viewing audience rises substantially with the amount of television watched. This means that the viewing base of ENG television grows with the quintiles. In 1981, for instance, the viewing audience among light viewers in Montreal (quintile 1) was 52 per cent, compared with 78 per cent for the heavy viewers of quintile 5.

### 3.2 Comparison of changes in quintiles

Relatively little change occurred between 1976 and 1981 in the percentage of ENG viewing for all quintiles in the rest of Quebec. In Montreal, the increase over time, although greater than that seen in the other regions, is less pronounced in the top two quintiles.

Once again, however, this similarity between the quintiles needs to be qualified. Although the drop in number of hours/population of FR viewing by Montrealers can be noticed in all quintiles, it is more evident among heavy viewers. Quintile 5 also showed the greatest increase in ENG television viewing. In the rest of Quebec, FR viewing is on the rise or is remaining constant in almost all quintiles; once again the greatest increase in both FR and ENG viewing is found in the top quintile.

It should also be pointed out that in this same region the rise in ENG television viewing for each quintile is generally greater than the rise in FR viewing (Table 5).

Also evident is that the long-term change in audience share for the rest of Quebec is more significant in the upper quintiles. The region's light television viewers seem to be increasing their viewing time at a slower pace than are heavy viewers.

Relatively speaking, then, ENG viewing habits do not generally vary according to the amount of television watched. In absolute terms, however, ENG viewing and the shift towards it clearly take on greater proportions with heavy television viewers.

Table 5

Quintiles

Percentage of viewing time and number of viewing hours  
of English-language stations

		Situation in 1981		Increase since 1976	
		Percentage of viewing time	hours/ population	Percentage of viewing time	hours/ population
Montreal	Q1	21.0	1.4	8.5	0.6
	Q2	20.8	2.9	8.1	1.2
	Q3	20.3	4.2	7.5	1.6
	Q4	20.2	5.9	5.4	1.9
	Q5	20.5	9.4	5.7	2.7
Rest of Quebec	Q1	9.5	0.6	3.3	0.3
	Q2	8.5	1.2	2.5	0.4
	Q3	10.0	2.1	3.5	0.8
	Q4	9.7	2.8	4.0	1.5
	Q5	8.4	4.2	3.0	1.7

4. PROFILE 3: VIEWING IN TERMS OF WORKING HOURS

Two factors justify the analysis of viewing profiles as a function of working hours. For one thing, persons who remain in the home tend to devote more time to watching television than do those who work outside the home. As in the case of the quintiles, one wonders how people at home divide up their extra viewing time. Second, people who work outside the home do not have the same choice of programs as those who stay at home. It therefore seemed particularly pertinent to compare the viewing

profile of people without paying jobs with that of full-time workers. We should add that only persons 18 and over were considered in this comparative study, for which we also took sex and level of education into account.

#### 4.1 Comparison according to working hours

In the two regions examined (Montreal and the rest of Quebec), unemployed people watched approximately ten hours more television than did fully employed people. As was the case for the quintiles, **the percentage of ENG viewing is much the same for both employment groups.** It is therefore not surprising that, in number of hours/population, unemployed viewers watch more ENG television than do fully employed viewers. Contrary to the quintiles, however, the viewing audience share of ENG stations appears to be equivalent for the two groups.

The long-term increase in ENG viewing seems to be slightly more pronounced for fully employed people in the rest of Quebec, whether in reference to viewing percentage, audience share, or number of hours/population. In Montreal, only with reference to audience share do fully employed viewers show a more significant change. It would be reasonable to assume that the unemployed viewers are, on the average, more elderly people; this would at least partly explain the smaller change.

#### 4.2 Comparison according to working hours and sex

Crossing the variables **working hours** and **sex** brings out some interesting information. It seems that the factor of working hours takes on more importance for women. Thus, women employed full-time watch more ENG programming than do unemployed viewers.

Even over the long-term, the increase in ENG viewing is still more noticeable among men than women, especially as regards the proportion of fully-employed men in the ENG viewing audience.

#### 4.3 Comparison according to working hours and education

It appears that the higher their level of education, the less people watch television in general, but the more they watch ENG television. This tendency is perhaps due to the level of bilingualism among more educated people.

Furthermore, changes in viewing patterns over time seem to be more pronounced for better educated people. One particularly evident long-term change is a drop in the number of FR viewing hours rather than in a rise in ENG viewing. It seems that more educated viewers are coming to prefer ENG programming over FR broadcasts, whereas for people with less education (secondary school or less), ENG viewing is only a supplement to FR viewing time that is constant or increasing (Table 6).



Table 6

Change in viewing hours/population for French, English-Canadian and American stations, in terms of working hours and level of education

Montreal Region

Education	Unemployed			Fully Employed				
	76	81		76	81			
Secondary or less	FR	29.1	28.3	-0.8	19.3	17.1	-2.2	
	EC	3.3	3.7	0.4	2.2	3.1	0.9	
	AM	1.4	2.4	1.0	1.2	1.6	0.4	
	Total	ENG	4.7	6.1	1.4	3.4	4.7	1.3
	TOTAL		33.8	34.4	0.6	22.7	21.8	-0.9
Technical or junior college	FR	31.6	15.6	-16.0	18.0	13.8	-4.2	
	EC	3.2	4.6	1.4	2.4	2.5	0.1	
	AM	0.9	2.0	1.1	1.2	2.0	0.8	
	Total	ENG	4.1	6.6	2.5	3.6	4.5	0.9
	TOTAL		35.7	22.2	-13.5	21.6	18.3	-3.3
University	FR	17.4	10.8	-6.6	13.9	12.2	-1.7	
	EC	3.6	3.1	-0.5	2.5	2.8	0.3	
	AM	1.4	2.0	0.6	1.1	1.8	0.7	
	Total	ENG	5.0	5.1	0.1	3.6	4.6	1.0
	TOTAL		22.4	15.9	-6.5	17.5	16.8	-0.7

When viewing habits were analyzed according to both education levels and employment status, we found that in Montreal unemployed people with an average or high level of education watch more ENG television, whereas in the rest of Quebec, people with jobs spent more time watching ENG television, whatever their level of education. An explanation for this difference may lie, in part at least, in the probably higher level of bilingualism in these groups.

On the whole, it seems that employment status has little effect on ENG television viewing habits, but does influence television viewing in general. Conversely, level of education can be clearly linked to the amount of ENG television watched.

## 5. PROFILE 4: VIEWING IN TERMS OF DIFFERENT TIME PERIODS

As well as examining the factors that encourage ENG viewing, it is also interesting to see when this viewing is done.

### 5.1 Non-segmented population

Our analysis revealed that the highest percentage of EC viewing occurs between 4 p.m. and 6 p.m. In contrast to this, the percentage of AM viewing is highest during the morning (from 6 a.m. to 12 noon) and at the end of the afternoon. During the mornings, interestingly, the AM viewing percentage is more than double that of EC stations. Generally speaking, ENG television attracts the most viewers (34 per cent) at the end of the afternoon, when game shows are on, and after 11 p.m. (26 per cent), when news programs are on.

### 5.2 Sex

The time of day for viewing ENG stations varies appreciably according to sex. Men prefer to watch ENG broadcasts at the beginning and end of the day. The 4 to 6 p.m. period, when programs such as "The Price is Right" are on, is still the peak viewing time for both sexes. With one exception (12 noon to 4 p.m.), men watch more ENG television than women do all day long. This applies to both AM and EC viewing. In general, men watch AM television mostly in the mornings and in late afternoon, whereas women's AM viewing remains at the same level until early evening.

Whether it be EC or AM programming, men watch more ENG television throughout the morning (6 a.m. to 12 noon).

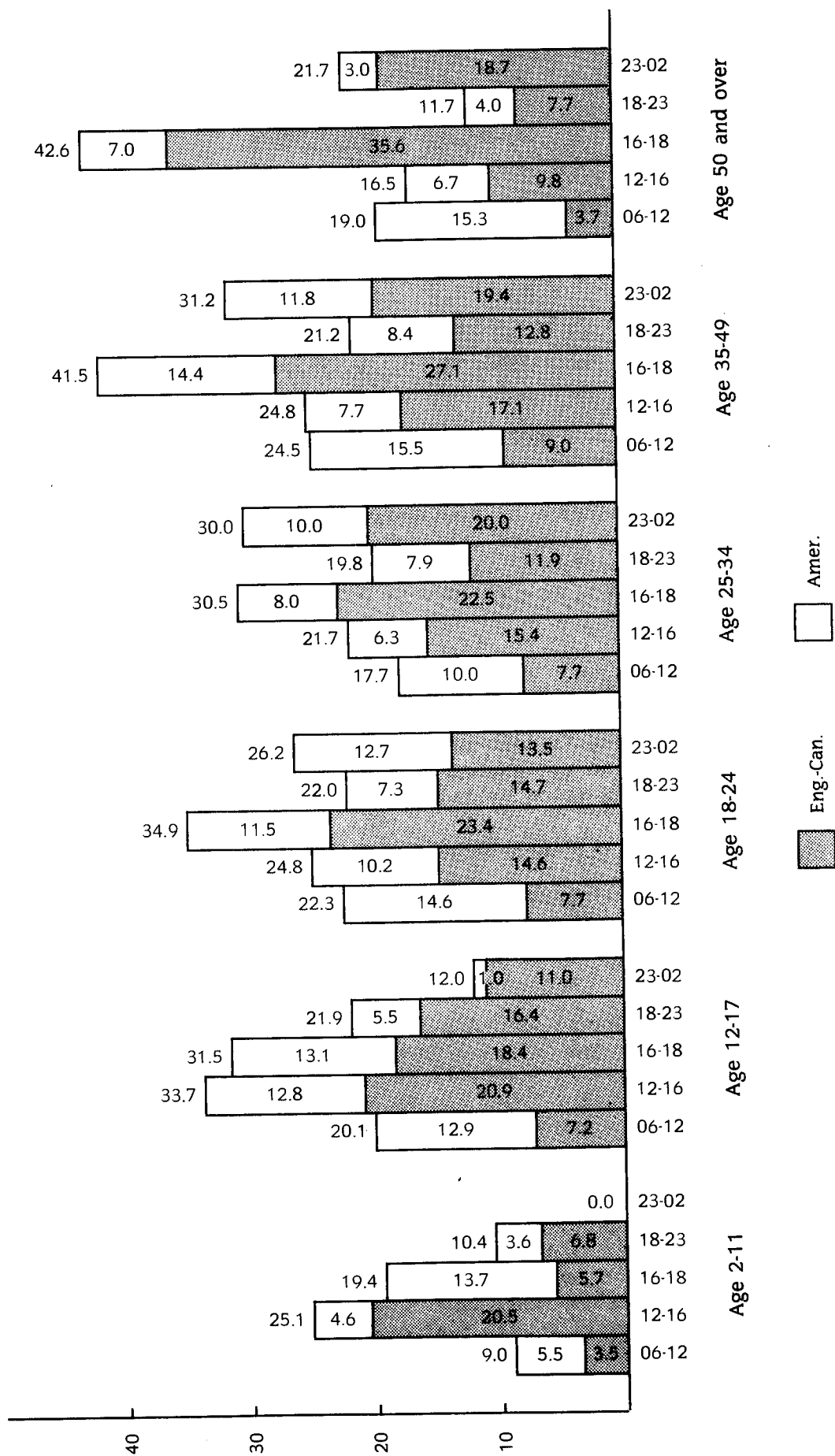
### 5.3 Age

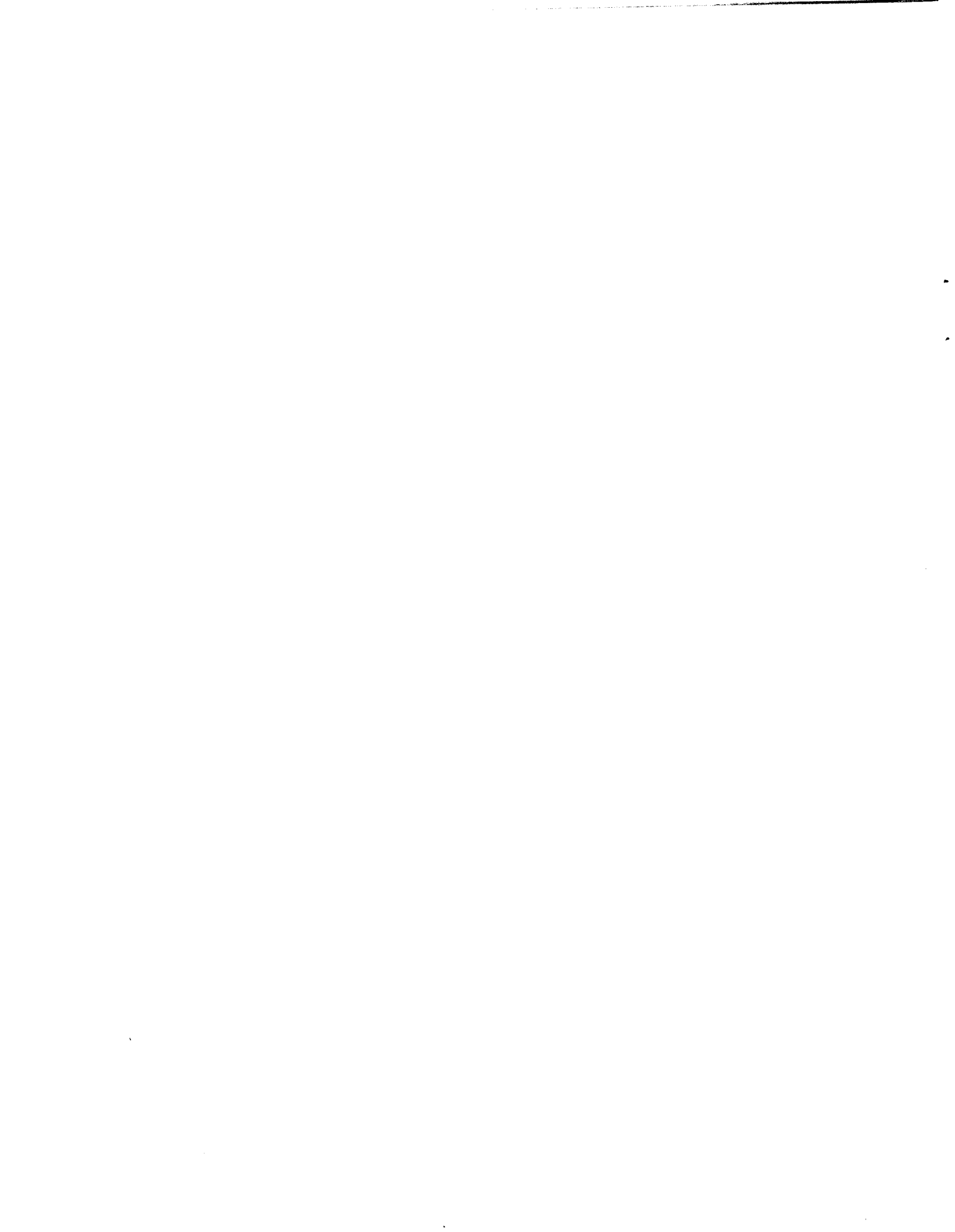
The viewing pattern just described needs to be qualified according to age groups. A clear demarcation can be noticed between the 2-to-17-year-old age group and the 18-and-over age group. Whereas adult's peak

ENG viewing time is in late afternoon, young people's peak time for these stations is at the start of the afternoon (12 noon to 4 p.m.). The scheduling of English-language cartoons at the beginning of this time slot may explain this viewing pattern. Likewise, the time of the day when the 2-to-11-year-old age group spends the least amount of time on this type of viewing is the morning. These tendencies may be determined by the presence or absence of programming aimed at these age groups during the various time periods. Perhaps the FR children's programs shown before noon are more successful in keeping the youngsters interest. This same observation applies equally to the period from 4 to 6 p.m., when the ENG viewing percentage of 2-to-11-year-olds is the lowest of all age groups. It is interesting to note that ENG viewing during "prime time" (6 to 11 p.m.) varies only very slightly in the 12-to-49 age group. In contrast, the 50-and-over age group spends a much smaller proportion of its viewing time watching ENG television during this time period.

In all time periods except the morning, EC television is more popular than the AM channels among all age groups save 2-to-11-year-olds, who prefer the AM programming, namely the "Tom and Jerry" cartoons at the end of the afternoon (Figure 10).

**FIGURE 10**  
**Montreal: Proportion of viewing time devoted to English-Canadian and American stations, by time slot and age group**





## CONCLUSION

At the beginning of this study, we set ourselves the objective of evaluating the importance of a potential viewing shift towards ENG television, while at the same time identifying the main variables linked to the trend.

It has, however, proved difficult to fully delineate the situation, in view of the number of variables that influence the study of such phenomena.

First, by way of a synthesis of our observations, we will briefly evaluate the **size** of ENG viewership in 1981 among the various segments of the population. We will then examine the **change** in this viewership since 1976, to identify the sub-groups in which a **shift in viewing** from FR to ENG stations can be detected. We will conclude with a commentary on the future of FR television. Data concerning Montreal and the rest of Quebec will be presented separately when required by the results.

### 1. SIZE OF THE ENG VIEWERSHIP IN 1981

We will present first the results for the overall population according to the two main variables, language and cable, and then describe the trends revealed by the other variables under consideration.

#### 1.1 Unsegmented population, language and cable distribution

Francophone Montrealers devote quite a large proportion of their viewing time to ENG stations: in 1981, the figure was 20.5 per cent. French-speaking Quebecers who live outside Montreal watch markedly less: in 1981, only 9.1 per cent.

The ability to speak and understand English is clearly decisive: although unilingual viewers in Montreal spend only 9.5 per cent of their viewing time watching ENG television, among bilingual viewers the figure rises to 31.9 per cent, nearly one third of all their viewing time. This variable is equally decisive in the rest of Quebec, where it was found that 3.9 per cent of ENG viewing is by unilingual viewers, and 25.4 per cent by bilingual viewers.

Subscribing to cable is also a factor: Montreal cable subscribers spend 26.1 per cent of their viewing time watching ENG television, as opposed to 15.1 per cent among non-subscribers. Yet the ratio between cable service and ENG viewing varies considerably between unilingual and bilingual subscribers: among unilingual people, the difference in ENG viewing between clients with or without cable service is only 4.2 per cent, whereas among bilingual viewers it is 12.2 per cent.

In the rest of Quebec, cable subscribing continues to be linked to ENG viewing increases; non-subscribers watch 6.4 per cent and subscribers 13.2 per cent. Finally, there is always interaction between language and cable, although it again is less marked than in Montreal. The difference between subscribers and non-subscribers is 3.5 per cent among the unilingual and 6.8 per cent among the bilingual. Whenever homologous groups in Montreal and the rest of Quebec are compared, ENG viewing is always higher in Montreal.

The difference in overall consumption between Montreal and the rest of Quebec is due not only to higher rates of bilingualism or cable subscribing in Montreal, but also to a greater open-mindedness towards ENG stations on the part of all Montrealers.

## 1.2 Other variables

Although, in the short term, variables other than cable and language appear to be less relevant to ENG viewing, these variables are far from being insignificant.

### Sex

We have already mentioned some socio-demographic variables. It was observed that women, who generally watch more television than men, watch approximately the same amount of ENG television as men. It was noted, however, that the cable variable affects women to a greater extent, particularly bilingual women.

### Age

Younger people, although they watch less television, devote more of their viewing time to ENG viewing than older people. Evidently the language barrier is a less restricting factor among younger people.

### Number of persons in the household

Although the number of persons in the household appears to be linked to overall television consumption, it appears to be insignificant with respect to ENG viewing.

### Regions

Several other kinds of variables were also considered in our analyses. Without again detailing our analysis of each region, we will underline certain trends. The size of ENG viewership is obviously greater in the regions outside Quebec. Cultural environment certainly plays a predominant role. In Quebec, the regions with the highest ENG viewing are urbanized sectors or areas geographically near different cultural groups.

### Quintiles

Analysis by quintiles shows that the proportion of ENG viewers is consistent from one quintile to the next. It would therefore appear that ENG programming, both in Montreal and in the rest of Quebec, is as attractive to the light as to the heavy television viewer.

### Hours worked

As a general rule, it was observed that people with full-time jobs spend more time watching ENG stations than those who reported no paid employment. The only exception is among men in Montreal, where employment status showed no effect on viewing habits.

### Education

Whether viewers are employed or not, ENG viewing percentages increase with education. It was observed that jobless respondents who have attended CEGEP or university watch particularly high proportions of ENG television.

### 1.3 Analysis according to time period

Analysis according to this variable allows us to better pinpoint the profile of ENG viewing.

In Montreal, ENG viewership peaks between 4 p.m. and 6 p.m. for both men and women. It is interesting that the 11 p.m. to 2 a.m. time slot,<sup>1</sup> offering a high news content, is the second most popular period, especially for men. Women show instead a definite interest in the afternoon ENG soap operas. Children are very attracted to the cartoons shown at the beginning and end of the afternoon, and also watch the game shows broadcast before supper. The other age groups also show a marked interest in the afternoon game shows.

## 2. THE GROWING TREND TOWARDS ENG PROGRAM PREFERENCE

We have identified certain factors that appear to be linked to ENG viewing. However, a preoccupation with ENG viewing only becomes really significant when its long-term growth is assessed. An essential point is whether the growth in ENG viewing is taking place **at the expense** of FR viewing (shift) or whether total television consumption is simply increasing (supplement). In discussing this growth, we will once again

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1. It should be noted that, after weighting in relation to the number of television viewers, we found that French-speaking viewers are most likely to switch to ENG television during the 6 p.m. to 11 p.m. time period.



first describe the overall results according to the language and cable variables, then cover the other secondary variables.

### 2.1 Non-segmented population: language and cable distribution

The growth of ENG viewing among French-speaking Quebecers is beyond contest: between 1976 and 1981, it rose 6.3 per cent in Montreal and 3.4 per cent in the rest of Quebec. Our next task is to determine the extent to which the variables under study are linked to these changes.

Language, once again, appears to be a particularly important factor, both in Montreal and in the rest of Quebec. In fact, although ENG television is attracting both unilingual and bilingual viewers, the trend is more pronounced among the latter. When the linguistic variable is neutralized, the change in the two large regional groups is only slightly more pronounced in the rest of Quebec than in Montreal.

The preferences of cable subscribers seem to be changing a little faster than those of non-subscribers, but the difference is small in comparison with that created by language. This observation applies to both regional groups.

In studying the combined effects of language and cable on the change in ENG viewing, Montreal must be distinguished from the rest of Quebec. In Montreal, only the viewing habits of unilingual non-cable subscribers differ from those of the other three groups. **It appears that only when the linguistic barrier is combined with limited access to ENG stations does the change become negligible.** Put another way, language appears to be linked to an increase in ENG viewing only among people who do not have cable service.

By comparison, in the rest of Quebec unilingualism appears to affect not only non-cable subscribers, but even to a degree the cable subscribers. In other words, outside Montreal being unilingual seems to be a much greater deterrent to ENG viewing than is a lack of cable service.

What concrete form does the trend towards ENG viewing take? We found that the change is evidenced by two indicators: audience share and number of viewing hours.

With respect to audience share, it appears that all increases in viewing percentages reflect increases in AM or EC audience shares, according to station availability.

With respect to hours, there are two possible scenarios: either ENG viewing is being added to rising FR viewing (supplement), or ENG viewing fills the gap left by falling FR viewing (shift).

In Montreal, signs of shifting are present in all the groups defined by the combination of the language and cable variables. In the rest of Quebec, however, only the bilingual cable subscribers are shifting away from FR viewing; the three other groups remain stable.

## 2.2 Other variables

We decided to assess only the overall trends in viewing shifts in relation to the other segmentating or moderating variables, as was done for the cable and language variables.

### Regions

Although the proportion of ENG viewing is increasing in the majority of regions, few definitive signs of shifting were observed. Only in Montreal were such signs found **for all the populations segmented** by language and cable. In addition, the shift seems to favour AM television over EC television. In Quebec City, the shift towards ENG television is noticeable only among bilingual viewers, and in Hull, among bilingual non-cable subscribers. The shift is, however, large enough to influence the total population data.

Of all the regions studied, Rouyn alone shows a drop in ENG viewing. One possible factor was that between 1976 and 1981, two FR stations were added to those available without the cable. Nevertheless, the number of FR stations has increased in other regions without causing any drop in ENG viewing.

One final point -- a shift of ENG viewing towards AM television has been observed in Sudbury.

### Quintiles

The change appears to be consistent from one quintile to the other, except in the higher quintiles of Montrealers, where it is less rapid. Perhaps in this case viewing has peaked. For all Montreal quintiles, the growth in ENG viewing is taking place at the expense of FR viewing. In the rest of the province, ENG viewing is being added to stable FR viewing in the lower quintiles and is accompanied by an increase of FR viewing among the higher quintiles.

### Sex

The sex of respondents seemed to have little effect on the quantity of their ENG viewing. The same was true for the long-term trends, where supplements or shifts are the same among men and women.

Age

It appears that older people are switching to ENG viewing more slowly than the youngest people. In addition, **the shift phenomenon is present only among the youngest people (under 25), while among older people, ENG viewing was mainly supplementary.**

Numbers of people in the household, hours worked, and education

Changes in ENG viewing percentages do not seem to be noticeably linked to numbers of persons in the household, hours worked, or education. These variables appear to be equally irrelevant to the shift phenomenon.

### THE FUTURE OF FRENCH-LANGUAGE TELEVISION

Throughout this study, we have described the statistical links between the variables examined and the consumption of television of various cultural origins. What conclusions should be drawn about the future of FR television?

Without being overly pessimistic, it must be admitted that, although FR television is managing to hold its own in a number of regions, ENG viewing is advancing everywhere; all the signs are that this trend will continue or even accelerate. In addition, total consumption of television as we know it today seems to have reached its apex. If this is the case, we can assume that, in the long term, growth in ENG viewership will be accompanied by a decrease in FR viewership.

Bilingualism has proved to be the variable most closely linked not only to the viewing of ENG television, but also to its increasing popularity. Bilingual francophones watch more ENG television than unilinguals, and this divergence is increasing.

The effect of cable service is also important, though less marked, and requires more subtlety of interpretation. Cable service alters station accessibility, either by improving reception or enlarging the choice of stations. The repercussions of cable subscription thus depend on the state of the pre-cable market. The advent of cable increases AM viewing in urban areas, where EC stations are already available. In some remote regions the cable also increases EC viewing.

Cable subscription frequently leads to an increase in total viewing rather than a language shift in viewing habits. When a shift takes place, it is always at the expense of the stations with the largest market share -- the cable helps to fragment the market. Yet, consumption of ENG television does not rise more rapidly among cable subscribers than among non-subscribers.

Of the other variables linked to interest in ENG television, age is undoubtedly the most important. The growth of ENG viewing among the young, although still quite weak in absolute terms, may well have significant consequences in the medium and long term.

The tendency of young people to become more and more aware of ENG programming is sure to have a **multiplying** effect over time. ENG viewing is doubtless favoured by bilingualism and cable subscribing, but depends also on individual psychological factors that are set in childhood. Habits acquired in the formative years are likely to influence future attitudes. In this sense, we must examine the increasing exposure of the young to ENG television.

Our study was not specifically concerned with the motives that lead television viewers to choose ENG stations. Such an analysis would require a much broader data base than just the viewing record. The summary analysis of content viewed during the different time periods appears to demonstrate, however, that viewers mainly turn to ENG stations in search of interesting content **when this content is unavailable on FR stations.**

For example, Montreal children turn in large numbers to ENG television at midday, when cartoons are broadcast on ENG stations only. Similarly, "The Price is Right", which is broadcast in the late afternoon without a French-language equivalent, drains more than 30 per cent of the French-speaking viewership of all ages.

Finally, and this is perhaps the most important factor with respect to ENG viewing, **we are witnessing a gradual change in sub-populations:** the proportion of bilingual people and cable subscribers is growing continually.

The importance of this movement cannot be evaluated precisely at this time, but clearly bilingualism among French-speakers is not regressing and the proportion of cable subscribers is increasing continuously. The figures speak for themselves: between 1976 and 1981, ENG viewing in Montreal increased by 6.3 per cent among the French-speaking population as a whole.

The specific increases for each subgroup studied are as follows:

Subgroup	Percentage increase
Unilingual non-cable subscribers	0.5%
Unilingual cable subscribers	5.0%
Bilingual non-cable subscribers	5.4%
Bilingual cable subscribers	5.3%

How can the fact that the overall viewing population is growing more rapidly than each of its parts be explained, other than by a **movement towards the groups that are bilingual or receive the cable?** In our opinion there can be no doubt about the matter. Of course, ENG viewing is not progressing among unilingual non-cable subscribers. But how many French-speakers will still be part of this group ten years from now?

The extension of bilingualism and of cable service obviously cannot be arrested. What possibilities should therefore be explored? Perhaps FR stations could diversify their content offerings during time periods carefully chosen to satisfy needs currently met by ENG programming.

The number of FR stations available in the various regions can also be examined. It might then prove judicious to increase the number of French-Canadian stations available, or to facilitate access to foreign French-language networks.

The study of these questions and of the policies put forward by the federal Department of Communications will therefore be decisive for the viewing profile of French-speaking television viewers in 1990.



APPENDIX





### **BBM'S SAMPLING METHODS**

The data in this report are drawn from individual television viewing records. A daily journal is kept for a week by persons aged 2 years and over, chosen from a representative sample. The following briefly describes BBM's survey method.

#### Sample level 1: the survey

BBM takes bi-level samples. First a sample of homes is selected, and a survey made of all the people who live there. Then a sample group of people is drawn from this survey. The first level of sampling, the survey, is performed in the following way.

Canada (except the Yukon and the Northwest Territories) is divided into approximately 370 separate cells. These cells are generally counties, census divisions, urban areas, or other regions defined by Statistics Canada. A register is established within each region, from telephone books or from post office lists in rural areas. A sampling of households is then systematically taken at random in each of the cells, independently of the other cells.

Under BBM's supervision, specially-trained interviewers telephone the selected households to survey all persons aged 2 years and over who live there. In order to reach the largest possible number of households, up to six telephone calls are made at various times of the week and the day. Households that could not be reached by telephone or rural households without telephone service receive a questionnaire by mail asking for a description of the number, sex and age of the residents. A free gift and a letter explaining the aims of the survey accompany the questionnaire.

#### Sample level 2: selection of the individual

The list of all the individuals in the households surveyed then becomes the basic sample for all the surveys in a year. BBM then follows the following procedure.

Ten groups are isolated within each geographical cell, according to age and sex. The names of the individuals in the groups are distributed geographically, and a systematic sampling is made based on one name chosen at random. The number of persons selected depends on the number of respondents needed for the tabulation, and depends largely on past experience. This method is used for the first survey of the year. Subsequent surveys are conducted in the same way, except that persons already surveyed are progressively eliminated, thus ensuring a different sample for each survey.

### The viewing record

A few days before a survey, the selected people are mailed a letter explaining the aims of the survey: for one week -- Monday to Sunday -- they must record their television viewing in the individual viewing record. BBM survey periods usually stretch over 2 or 3 weeks, but, each respondent keeps a record for just one week and the respondents are distributed proportionally over all the weeks of the survey.

The record itself is a paperback booklet with two pages for each day of the week. The respondent records the call letters of the station watched for each quarter hour of the day between 6 a.m. and 2 a.m. the following night. Personal information about the respondent (sex, age, etc.) is also recorded in a section reserved for this purpose.

When the record is addressed to a child, an adult in the household must complete it in the child's name by marking down only what the child watches. In other words, each booklet must reflect the viewing habits of the particular respondent to whom it is addressed.

A free gift accompanies the viewing record in order to encourage people to participate in the survey. The viewing record is accompanied by a letter explaining the objectives of the survey; in addition, a reminder card is sent during the week of the survey. Approximately 50 per cent of all records mailed return completed to BBM, although the reply rate varies according to the survey and the region.

### Verification and compilation

After manual verification, the information contained in the records is reproduced on recording tape. It is then subjected to a series of long and painstaking verifications. Audience estimates are established for each region of the country. In order to correct for different reply rates in the various demographic subgroups, the data are weighted according to age, sex and bilingual districts and official language. Actual sample sizes for each subgroup appear at the end of this report.

### Sampling errors

The formulae normally used to establish sampling errors are based on premises that do not apply to level 1 household sampling, yet the majority of television viewer and listener survey agencies use this sampling technique. To overcome this failing, BBM made a series of statistical tests, with the help of different samples. These tests permitted us to establish valid sampling errors for the audience estimates published. The sampling errors have been verified in every survey since November 1970. The following table gives the limits of accuracy that can be applied to the audience ratings for all sub-groups in this report.

**SIZE OF SAMPLE**

<u>Montreal</u>	<u>Year</u>	<u>Unilingual</u>	<u>Bilingual</u>
	1976	914	737
	1978	636	632
	1979	527	460
	1981	598	582

<u>Rest of Quebec</u>	<u>Year</u>	<u>Unilingual</u>	<u>Bilingual</u>
	1976	7,360	1,975
	1978	5,456	1,613
	1979	4,201	1,285
	1981	6,013	1,765

<u>Montreal</u>	<u>Year</u>	<u>Non-cable subscribers</u>	<u>Cable subscribers</u>
	1976	1,241	412
	1978	830	438
	1979	608	379
	1981	608	572

<u>Rest of Quebec</u>	<u>Year</u>	<u>Non-cable subscribers</u>	<u>Cable subscribers</u>
	1976	6,343	2,992
	1978	4,322	2,747
	1979	3,352	2,134
	1981	4,598	3,180

Montreal

	Unilingual without cable	Unilingual with cable	Bilingual without cable	Bilingual with cable	Total
1976	736	178	503	234	1,651
1978	447	189	383	249	1,268
1979	345	182	263	197	987
1981	341	257	267	315	1,180

Rest of Quebec

	Unilingual without cable	Unilingual with cable	Bilingual without cable	Bilingual with cable	Total
1976	5,224	2,136	1,119	856	9,335
1978	3,524	1,932	798	815	7,069
1979	2,712	1,489	640	645	5,486
1981	3,759	2,254	836	926	7,778

**SIZE OF SAMPLES STUDIED, BY REGION, 1976-1981**

	1976	1981
	N=	N=
Sudbury/Timmins/North Bay	368	214
Rouyn-Noranda	379	527
Ottawa	62	75
Hull	324	350
Trois-Rivières	297	241
Chicoutimi	309	640
Quebec	719	635
Rimouski	94	534
Sherbrooke	180	709
Moncton	22	126
Montreal	1,651	1,180
Rural Quebec	7,033	4,142
Whole of Quebec (less Montreal)	9,335	7,778

SIZE OF SAMPLE	STANDARD VARIANCES BY VIEWING LEVEL				
	5%	10%	20%	30%	50%
50	3.0	4.0	5.5	6.5	7.0
75	2.5	3.5	4.5	5.5	6.0
100	2.0	3.0	4.0	4.5	5.0
150	2.0	2.5	3.0	4.0	4.0
200	1.5	2.0	3.0	3.5	3.5
300	1.5	2.0	2.5	2.5	3.0
400	1.0	1.5	2.0	2.5	2.5
500	1.0	1.5	2.0	2.0	2.5

Example: For a sample of 400 and a rating of 20 per cent the standard variance is 2 (there are 683 chances out of 1,000 that the rating lies between 18 and 22 per cent). Within 2 standard variances (955 chances out of 1,000) the sampling error is doubled.

Canada