CANADIAN SOVEREIGNTY AND CULTURAL INDUSTRIES

JANUARY 1986

#1514

DECIMA RESEARCH ltd.

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TABLE OF CONTENTS

TABLE OF CONTENTS

ANALYSIS

I. INTRODUCTION

A. Overview of Study

This report for the Department of Communications presents findings from a survey of the Canadian public's awareness of, and attitudes toward, the country's "cultural industries." These "industries" were defined as the companies which produce or distribute films, television, radio, publications, and music products. In addition, this report explores the relationship between Canada's cultural industries and Canadian identity. The second chapter examines public perceptions of these industries in terms of their economic health and importance to the economy. The next chapter explores the issue of foreign involvement in cultural affairs. The fourth and concluding chapter deals with the government's role in the development of cultural industries and examines this issue area in the context of the free trade debate.

This report is largely based on the results of a nation-wide sample of 1,350 respondents, with an oversample of 150 people in Quebec, for a weighted total of 1,200. This oversample was completed to more fully explore any regional differences between predominantly English provinces and Quebec. The field-work for the survey was conducted between December 17-21, 1985. Additional material discussed in this report comes from the December 1985 Decima Quarterly report on Public Affairs Trends.

B. Definition of Culture

Formulating a definition of culture is always problematic, particularly in the Canadian context. There is no universal definition of culture. Some definitions are very broad and comprehensive such as those developed in recent years by UNESCO and the Canadian Conference of the Arts. In its Mexico City declaration on cultural policy in September 1982, UNESCO defined culture as:

> ...the whole complex of distinctive spiritual, material, intellectual, and emotional features that characterize a society of social group. It includes not only the arts and letters but also modes of life, the fundamental rights of the human being, value systems, traditions and beliefs.

An equally comprehensive definition of culture was proposed in 1984 by the Canadian Conference of the Arts: "The way human beings do what they do, as it relates to the whole life of man." Such broad definitions are difficult to operationalize for the purpose of collecting and interpreting cultural statistics.

A more narrow operational definition, presented by the National Advisory Committee on Cultural Statistics in 1984, underlies the Department of Communications' conception of culture as resident in the cultural industries. The committee confines itself to the sectors that normally cover cultural activities in Canada including "the performing arts, visual arts, literature, heritage, libraries, and cultural industries (radio, television, film, video, sound recording and publishing)." In this survey our conception of culture is confided even more precisely to "cultural industries" and the products they produce.

To facilitate more detailed analysis of the findings of this survey and of the differing attitudes of various population subgroups, several various indices have been constructed based on this definition of culture. They consist of various categories of cultural nationalism which we define as Cultural Nationalists (CNs), Non-Nationalists (NNs), and Ambivalent Nationalists (ANs). Indices have also been developed relating to state intervention which we have labelled as Positive State Interventionists (PSIs) and Anti-state Interventionists (ASIs). Analysis utilizing these indices should provide some useful information to assist in issues management and communications strategy development.

Reference is also made in this report to Decima Quarterly Report data which employ another definition of Canada's culture -- what makes Canadians different from Americans? Our purpose in introducing this definition and data is to bring to bear the findings of other research which are relevant to this study in terms of what Canadians believe contributes to their sense of national identity.

C. Indices of Cultural Nationalism and State Intervention

The rationale for constructing the various indices of cultural nationalism and state intervention is to assist the Department of Communications in isolating segments of the population possessing distinctive orientations to some of the policy issues addressed in this survey.

In constructing the indices, our interest is in isolating different attitudes within the population towards the necessity of Canadian ownership in the cultural sector and the appropriate role of the state. The three positions on the cultural nationalism index -- Cultural Nationalists (CNs), Non-Nationalists (NNs) and Ambivalent Nationalists (ANs) -- are constructed by grouping respondents on the basis of their responses to Question 20 and Question 6 on the Interview Schedule. Question 20 probes the extent to which Canadians believe "the strength of our culture depends, in the long run, on ensuring that the cultural industries are owned by Canadians," while Question 6 asks Canadians whether they feel that Canada has a distinct culture. Our CN category includes those individuals who feel that Canada has a distinct culture and who also indicate that the strength of our culture depends a great deal on Canadian ownership of the cultural industries. Non-Nationalists are those who do not feel Canada has a distinct culture and believe that the strength of our culture depends either "not too much" or "not at all" on Canadian ownership of cultural industries. Ambivalent Nationalists believe Canada has a distinct culture, but feel that the strength of our culture depends only somewhat on ensuring that the cultural industries are owned by Canadians.

The two positions on the state intervention index -- Positive State Interventionists (PSIs) and Anti-State Interventionists (ASIs) -- are constructed on the basis of responses to Questions 12 and 23 on the Interview Schedule. Question 12 asks whether or not the government should or should not provide special financial support for the cultural industries. Question 23 asks respondents whether the federal government should oversee the cultural industries to ensure that they operate in a way that helps promote Canadian culture, whether they are Canadian or foreign owned. ASIs are those individuals who believe that the government should not provide special financial support to the cultural industries and should not oversee the cultural industries to ensure that they promote

Canadian culture. PSIs, on the other hand, are in favour of the government playing this supervisory role and are also in favour of the government providing special financial support for them.

Frequency distributions and demographic breakdowns for the different indices are displayed in Table 1 and Table 2. With respect to cultural nationalism, the data in Table 1 show that the majority of Canadians are either CNs (39.9%) or ANs (25.2%), with only 5% of the population classified as NNs.

Almost half (48.4%) of Canadians are classified as Positive State Interventionists (PSIs) and 15% fall into the ASIs category.

Table 1

FREQUENCY DISTRIBUTION OF
CULTURAL NATIONALISM AND INTERVENTION INDICES

CULTURAL NATIONALISM	RESPONDENTS	PERCENT
CNs	472	40
NNs	59	5
ANs	298	25
No opinion	354	30
STATE INTERVENTION		
ASIs	178	15
PSIs	575	48
No opinion	435	37

There is a greater degree of variation in group composition on the basis of demographic characteristics in the state intervention indices than in those dealing with cultural nationalism. As Table 2 indicates, women and francophones are marginally more likely to be Cultural Nationalists, as are those with at least some university education. No significant demographic variations are evident regarding the NNs or ANs populations, although there is a slight tendency of those with elementary or public school education to fall into the AN category.

Table 2

INDICES OF CULTURAL NATIONALISM AND STATE INTERVENTION

CULTURAL NATIONALISM

Key Demographics

Cultural Nationalists (CNs)	Non-Nationalists (NNs)	Ambivalent Nationalists (ANs)
Women		
Francophones		
Income: lower		

STATE INTERVENTION

Positive State Interventionists (PSIs)	Anti-State Interventionists (ASIs)
Women	
Language: -- Francophone	Anglophone
Education: -- lower levels	
Income: -- lower	Higher

The most significant and extensive variations pertain to those Canadians who favour positive state intervention. Francophones (66%) are much more likely than the population as a whole to adopt this view, while women are marginally more likely to be included in this group. Distinctions can also be drawn on the basis of education and income. Individuals with lower levels of education and income are most likely to favour government action in some way. High-income Canadians are more likely to oppose government providing financial assistance or having a regulatory role. Looking at the cultural and intervention indices together, women and Francophones tend to fall into both the Cultural Nationalist and Positive State Interventionalists categories, while high-income earners tend to be excluded from both the CN and PSI categories.

The remarkable finding here is that income and education, which usually reinforce each other, break differently on the basis of orientation toward cultural nationalism and state intervention. Highly educated individuals, for instance, are disproportionately ASI on the intervention scale, yet are more likely to be cultural nationalists. As our analysis below reveals, however, CNs and PSIs frequently display similar perspectives or orientations on various policy questions. The conclusion to be drawn is that, in contrast to what is typically the case, SES cannot be utilized as a consistently good predictor of attitudes on cultural nationalism and related questions. On the other hand, its traditional predictive power is more applicable to the case of Canadians' orientations toward state intervention.

What is notable from both the cultural nationalism and state intervention indices is the sizeable proportion of the population which fall into the "no opinion" category in both cases. In regard to cultural nationalism, 30% of the sample do not fall into any of the three categories of CN, AN or NN. Similarily, with respect to state intervention, 37% of respondents can neither be classified as PSI or ASI. From a political communication perspective, the significance of this is that those Canadians falling into the "no opinion" category are not particularly sensitive to cultural nationalism or state intervention issues. In formulating communication strategy and tactics, the government should concentrate on those segments of the population which are sensitive to these issues and can for this purpose consider the "no opinions" likely to be neutral toward or perhaps immune from such stimuli.

II. CANADIAN CULTURE AND IDENTITY

While Canada's cultural industries are many and varied, a crucial question prior to any examination of these industries is the extent to which Canadians believe that Canada, in fact, has a distinct culture and identity. It is cultural industries, after all, that are, in part, believed to sustain and support a sense of Canadian culture and identity.

When this question was put to respondents, the results indicate a clear perception by almost three-quarters (73%) of the adult population that, despite the pervasive influences from other countries throughout Canadian history, particularly the United States, Britain, and France, a distinct Canadian culture and identity does indeed exist. This sense of identity, as Table 3 indicates, tends to be more strongly stated among residents of the Maritimes and rural communities, and while weaker, is still the majority opinion in British Columbia. It is also apparent that a greater amount of people with higher formal education feel more strongly that Canada has a distinct culture.

Table 3

DOES CANADA HAVE A UNIQUE CULTURE?

	HAS DISTINCT CULTURE %	NO PARTICULAR CULTURE %
Average	73	27
Atlantic Region	81	18
Community Size: Under 10,000/Rural	80	20
University Educated	79	20
British Columbia	64	36

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

In light of this affirmation, the main communication challenge is a regional one. To strengthen the link in British Columbians' perceptions between the cultural industries and a sense of Canadian identity, one approach might be to raise the national profile of prominent British Columbians active in the various cultural industries. Promotional resources could also be directed toward the sponsorship of film and music festivals, awards, and other similar ideas aimed at raising British Columbians' awareness of Canadians in the cultural industries, particularly those from their home province.

A. The Role of Cultural Industries

The four largest cultural industries, television, publishing, music and film are all believed to be making a considerable contribution to the development of Canadian culture and identity, although a clear hierarchy does exist. The television industry, as Table 4 makes clear, is seen by the largest number of people (85%) to be contributing a great deal or somewhat to Canadian cultural identity . This is followed by the publishing industry (79%), music (75%), and film (63%). Logic suggests that levels of consumption of the products of each of these industries have a lot to do with the levels of contribution cited. Table 4 illustrates that the first three industries tend to be close in terms of the responses they generate, but that the Canadian film industry is seen by fewer Canadians to be contributing "a great deal." This likely reflects the more limited exposure Canadians have to Canadian film, as compared with the other three media.

Table 4

CULTURAL INDUSTRIES EFFECT ON CULTURE AND IDENTITY

	A GREAT DEAL %	SOME-WHAT %	NOT TOO MUCH %	NOT AT ALL %
INDUSTRY				
TV	42	43	11	4
Publishing	40	39	14	5
Music	33	42	18	6
Film	19	44	25	11

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

It should be noted that the intensity of the responses to the first three media (more than 33% say "a great deal") is unusually strong for such a measure, providing a further indication that these industries have won significant constituencies.

When demographic variations are considered, it is clear that Francophone respondents are more likely than others to believe that cultural industries do "a great deal" to reinforce and reflect a distinctly Canadian culture and perspective, particularly with respect to publishing (50% Francophone; 40% Anglophone), music (41% Francophone; 33% Anglophone) and television (50% Francophone; 42% Anglophone). Residents of British Columbia are, on the other hand, significantly less likely to acknowledge the cultural benefits of these industries, particularly in the areas of music and publishing as compared with elsewhere in the country.

These two regional differences surface repeatedly throughout the data. The strong support in Quebec on most of the factors relating to cultural industries is in marked contrast to British Columbia, where there is consistently less support than the national average.

There are also some notable variations in this question other than on the basis of region and language. Young people (ages 18-24 years) along with Quebec residents are much more likely to believe that music reinforces a distinctly Canadian culture and perspective, whereas older Canadians are less likely to do so. The significant variation in opinion on the basis of gender concerns book publishing. Women are more likely than the population as a whole to attach a great deal of cultural importance to this sector. Overall, there is no doubt that Canadians as a whole believe that a national identity has emerged and is reinforced by, and reflected in, our cultural products.

There is some variation, however, in the extent to which this view prevails in terms of the population subgroups defined on the basis of their views on cultural nationalism and state intervention. PSIs and CNs are more likely to believe that the domestic film, television, and book publishing industry do a great deal to reinforce and reflect a distinctive Canadian culture and identity. Typically, the views of ANs are not too different from those of the general population, except in terms of the intensity of their views pertaining to television and film, which ANs are more likely to identify as "somewhat" important in reinforcing and reflecting Canadian culture and identity.

While it is apparent that the majority of Canadians believe this country does indeed have a distinct national identity, it is worthwhile examining those who disagree with this idea. It seems probable that this perspective, held by a quarter of the population (27%), may also affect their opinions on various other issues associated with cultural industries and foreign ownership.

In examining all the available data in relation to this issue of the existence of a distinct identity, it becomes clear that the minority, who are less likely to support the idea, are also considerably less likely to believe that:

- Cultural products have an effect on Canadian identity;
- The quality of products is excellent or good;
- Cultural industries are financially strong;
- Cultural industries should get financial support from the government;
- The government should oversee cultural industries to ensure Canadian promotion;
- Canada must own/control cultural industries;
- Cultural industries contribute to the economy; and that
- The CBC plays a vital role in helping Canadians.

While each of these points are discussed more thoroughly within the report, this brief overview reveals an interesting finding. In general, those who do not hold the opinion that Canada has a national identity are more likely to down play the positive effects of the cultural industries or their products and to indirectly favour foreign ownership or control. Clearly, this is powerful evidence of the continuing importance of forging a strong sense of national identity.

B. The Importance of Cultural Industries

Even though the majority of respondents indicate that a unique Canadian culture does exist and that cultural industries are important in reflecting and reinforcing this national identity, the data also reveal that a substantial number of Canadians may not view cultural industries as important to them personally. In other words, cultural industries may be perceived by Canadians as helping other Canadians recognize a national identity, but are not perceived as being personally important. This is demonstrated by the fact that 53% agree that they "don't really get their sense of Canadian identity from books, music, TV and things like that." This view is more likely to be voiced in Alberta and less likely to come from Quebec respondents, who seem to rely more on these products to reinforce their sense of identity. Cultural Nationalists and those who favour positive state intervention are also less likely to hold this view, while ANs and ASIs are more likely to agree with the statement. Thus, regardless of the types or quality of Canadian cultural products, they are not necessarily the originating or propagating source for a sense of personal Canadian identity for a large portion of the population. Furthermore, 48% agree with the statement, "The people who are talking about Canadian culture in the media these days do not seem to be talking about any of the sort of things I'm interested in." Not surprisingly, CNs and PSIs are less likely to agree with this, while ASIs are more likely to agree. While Canadian cultural industries are perceived, in general, as important contributors to the national identity, on a personal level other aspects or contributors to identity may be more important for many Canadians.

This view is also evident in responses to two questions in the Decima Quarterly of December 1985. Fully 73% of Decima Quarterly respondents said Canada is very (30%) or somewhat (43%) different from the United States. In a subsequent question, respondents were asked what the most importance contributor to this perceived difference was. As illustrated in Table 5, there is little consensus regarding the most important contributor. The fact that a variety of sources were named, and that cultural expressions were mentioned infrequently, suggests that there is limited "top of mind" salience for the great majority of the population regarding the perception of the importance of Canada's cultural industries in helping to define Canadian identity.

Table 5

MOST IMPORTANT CONTRIBUTOR TO CANADA'S DIFFERENT CULTURE AND IDENTITY[1]

	PERCENTAGE
A country with two official languages	21
Our approach to relations with other countries	20
Our treatment of the poor, disadvantaged and minorities	16
Our history and geography	17
Our system of government	13
Our art, books, films and other forms of artistic expression	7
Our national symbols, like the flag and national anthem	3

Note: Percentage may not sum to 100% due to rounding and the exclusion of "No Opinion."

In short, Quarterly data could be interpreted as indicating Canadians feel that our culture does not make us especially distinctive but other things do. The distinguishing feature of Canadian identity include Canada's two official languages, our history and geography, system of government, as well as process factors such as our treatment of the poor, disadvantaged and minorities, and our approach to relations with other countries.

Perhaps the main utility of the Quarterly data, in the context of this report, is in highlighting the fact that Canadians do not necessarily think that aspects of their culture, as embodied and reflected in the cultural industries, are what distinguishes the country from the United States. While culture may be resident in the products or activities associated with the cultural industries, it also seems to be perceived to be resident in a myriad of institutions and processes which distinguish Canada from the United States. This is not to say that there is no recognition of the role played by the

[1]See Decima Quarterly Report on Public Affairs Trends, December 1985. Note that the question asks, "Thinking about Canada's culture and identity, how different do you think Canada is from the United States? To which 89% replied "very different, "somewhat different" or "not very different." These respondents were then asked, "Which one of the following things do you think makes the most important contribution to Canada's culture and identity?". A list of eight alternatives was provided.

cultural industries, as Table 5 illustrates. In this respect further responses to a question about the CBC are instructive. In all, 82% of respondents agree with the statement, "I think the CBC plays a vital role in letting Canadians learn about themselves and be proud of themselves." When regional differences in response are considered, the role of the CBC is viewed as more important in the Maritimes, Quebec and rural communities, while less important in British Columbia and Alberta.

Cultural Nationalists and PSIs are even more likely than the population as a whole to hold this view, while ASIs are less likely. The similar attitudes of CNs and PSIs regarding the vital role of the CBC, along with their similar attitudes on several other policy questions, suggests that there is a linkage between a sense of cultural nationalism and attitudes toward the role of the state. Moreover, the particular attitudes of CNs and PSIs concerning the CBC may have some significance for government communications relating to the expected new broadcasting policy. The data suggest potential support among CNs and PSIs (40% and 48% of Canadians respectively) for any government initiative emphasizing enhanced or increased Canadian programming through a revitalized CBC in particular. This reinforces the view developed above that Canadians are selective regarding what they perceive to be factors shaping identity and culture; not surprisingly, those industries that they have the most experience with are seen to be the more important shapers of cultural identity.

C. Canadian Consumption

As noted earlier, television and publications are perceived by the public as having considerable importance in helping to shape Canadian culture and identity. In this section, the role of these factors is explored in some detail through an examination of the extent exposure to Canadian television and publications and the correlates of this exposure.

Overall, exposure to Canadian publications and television, as reported by respondents, is somewhat limited, and this is a finding that has been reported in a number of previous studies. In all, 57% of respondents report that they have a subscription or regularly buy a

Canadian magazine. This figure increases directly with education and income; the well-educated (69%) and high-income earners (74%) are more likely to read Canadian magazines, while downscale respondents are less likely to do so; however, this result must be considered in light of the fact that many Canadians may not buy any magazines.

The small amount of Canadian television programming consumed is perhaps more significant; as Table 6 shows, Canadian programmes comprise less than half of most Canadians' total television viewing.

Table 6

EXTENT OF CANADIAN CONTENT VIEWED ON TELEVISION

AMOUNT OF CANADIAN TELEVISION WATCHED	PERCENTAGE
Less than one-quarter of total viewing	21
One-quarter	28
One-half	27
Three-quarters	15
Everything	7

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

Demographically speaking, Canadian programming viewers tend to more likely be Francophone, rural residents, downscale in terms of total household income, and older than other Canadians. It is difficult to estimate how much of this viewing is based on the unavailability of alternate (American) programming, as in more remote areas, or due to language barriers, as in the case of Francophones, or because of a real preference for Canadian programming, or due to the fact that a significant proportion of programmes on Canadian television originate from outside of Canada.

In further examining the relationship between the consumption of Canadian media and attitudes regarding cultural industries, a pattern clearly emerges.

Table 7

AMOUNT OF CANADIAN CULTURE CONSUMED
AND PERCEPTION OF A DISTINCT CANADIAN CULTURE

	HAS UNIQUE CULTURE %	NO PARTICULAR CULTURE %
AMOUNT OF CANADIAN TV WATCHED		
All	85	15
Three-quarters	78	21
One-half	80	20
One-quarter	68	31
Less than one-quarter	62	37
BUY CANADIAN MAGAZINES		
Yes	77	23
No	67	32

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

As is evident in Table 7, the belief that Canada has a particular culture rises directly with the amount of Canadian television watched. Those who watch only Canadian programming are significantly more likely to believe that Canada has a unique culture than those whose viewing is less Canadian oriented. This pattern is also evident among those who regularly read Canadian magazines, although the results are less dramatic. This indicates a real difference in cultural perception between those who take advantage of Canada's cultural products and those who tend to refer to non-Canadian material for information or enjoyment.

There are two explanations for this relationship; either those who are exposed to Canadian material are made more aware or are convinced of Canada's distinct identity through this exposure, or those who believe in a distinct identity are simply more Canadian oriented and seek out Canadian material. It is quite likely that both these phenomena are working at the same time within different segments of the population.

The differences between those who do and do not consume Canadian media are also evident in other issues involving the cultural industries.

Table 8

CANADIAN TELEVISION CONSUMED
AND PERCEPTIONS OF PRODUCT QUALITY

AMOUNT CANADIAN TV WATCHED	OVERALL QUALITY EXCELLENT/GOOD %
All	80
Three-quarters	77
One-half	73
One-quarter	60
Less than one-quarter	51

Those who watch Canadian TV programming are also more likely to believe that Canadian cultural products are of excellent or good quality (Table 8) and, that these products have a significant effect on reinforcing or reflecting the national identity (Table 9). These data suggest that increases in positive attitudes about cultural products are directly linked to consumption of Canadian TV. Two explanations are again possible. The first hypothesis is that greater exposure to Canadian content leads the way to the perception that the quality of Canadian products is high, and further reinforces the belief that cultural industries have a strong impact on Canadian cultural identity. The alternate explanation for Tables 8 and 9 is that perceptions that Canadian cultural products are of high quality, and that cultural industries have an effect on cultural identity are associated with a form of cultural nationalism which in turn leads to more Canadian content being consumed. As in the case of the links between television consumption and recognition of a unique Canadian culture, both explanations are likely correct to some degree.

Table 9

PERCENT SAYING A PARTICULAR INDUSTRY
HAS A GREAT DEAL OF EFFECT ON
CANADIAN CULTURE AND IDENTITY BY
AMOUNT OF TELEVISION VIEWED

	SAYING A GREAT DEAL			
	TV	Books	Music	Films
	%	%	%	%
AMOUNT CANADIAN TV WATCHED				
All	59	58	43	26
Three-quarters	54	45	37	28
One-half	48	42	36	22
One-quarter	38	34	31	15
Less than one-quarter	30	34	26	13

The implication of the links between media consumption and attitudes is that for many Canadians, things like Canadian content requirements do ultimately influence perceptions of Canadian culture and cultural products. At the same time though, some Canadians take a strong nationalist stand toward culture and it is because of this that they seek out Canadian programming. In both cases a nationalist approach to culture brings about positive results.

D. Quality of Canadian Products

While some cultural industries are perceived to have more of an impact on national identity than others, there is a general belief (66%) that the overall quality of Canadian cultural products is excellent (11%) or good (55%). Women, Francophones, Cultural Nationalists and Canadians who favour government oversight and financial support of the cultural industries are more likely to regard the quality of Canadian products as good or excellent, while NNs and ASIs are more likely to regard the quality of Canadian products as fair or poor. The vast majority of respondents (87%) agree with the statement, "I think the quality of Canadian cultural products such as books, films, radio, television, and music recordings has improved a lot in recent years." This view, while held almost unanimously, is even more likely to come from rural residents and women, CNs, ANs and PSIs, and less likely to be mentioned by Ontario residents outside of Toronto along with NNs and ASIs.

Therefore, even though cultural products are perceived to affect national identity in varying degrees, on the whole, they are viewed as valuable, quality products which have improved over the years. This implies that they are not consumed simply because they are Canadian, but that their Canadian dimension is definitely an attractive feature.

Table 10 examines perceptions of the quality of Canadian products, in relation to the effect cultural industries have on national identity. It is apparent from the data that those saying a particular cultural industry has an impact on sustaining a distinct Canadian culture and identity are much more likely than those perceiving little Canadian cultural distinctiveness to say the quality of Canadian cultural products is excellent or good. This association suggests that pride in the quality of Canadian cultural products is an intrinsic element in developing a perception of a Canadian cultural distinctiveness.

Table 10

CULTURAL INDUSTRIES' EFFECT ON CANADIAN IDENTITY BY PERCEPTIONS OF QUALITY OF CULTURAL PRODUCTS

EFFECT OF CULTURAL INDUSTRIES ON CANADIAN IDENTITY*	QUALITY OF CULTURAL PRODUCTS EXCELLENT/GOOD %
A great deal	78
Somewhat	64
Not too much	56
Not at all	37

* The responses for four cultural industries - TV, film, publishing, and music, have been averaged for an overall cultural industries measure.

The main communications challenge is therefore to work to develop this pride in the quality of Canadian products among those segments of the population which currently do not rate the quality highly. Analysis of the data indicates that the main communications target subgroup in this case is Anglophones, 37% of whom rate the quality of Canadian products as only fair to poor. This is especially significant in the context of trade and promotion issues as discussed in more detail below.

III. FINANCIAL, PROMOTION AND TRADE ISSUES

A. Economic Status

Canada's cultural industries are perceived by the public to be in varying degrees of financial well-being. While the radio industry is reported to be enjoying strong financial health (73%), this is somewhat less the case for the music industry (60%), television (54%), and publishing (54%), and only one-third of the respondents (30%) believe the Canadian film industry is in a strong financial situation. Clearly, a significant minority of Canadians have serious reservations about the financial health of some of our cultural industries.

Table 11

FINANCIAL STRENGTH OF CULTURAL INDUSTRIES

INDUSTRY	VERY STRONG %	STRONG %	WEAK %	VERY WEAK %
Radio	12	61	21	2
Music	13	47	33	3
TV	9	45	39	4
Publishing	5	48	37	3
Film	4	26	59	7

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

Interestingly, the perception of the financial strength of three of the industries (film, publishing and music) are all significantly higher among poorer and less-educated respondents and lower among those with higher levels of education and income. Thus, the fact that only the upscale respondents, for the most part, seem aware of any financial difficulties facing these industries, suggests that perceptions of these industries among lower income and less-educated Canadians appear to be based on less familiarity or knowledge.

From a policy perspective, the relatively large number of respondents who say the publishing and especially the film industry are in financial difficulties suggests that continued funding of these areas will likely be perceived to be justified. The perception of greater weakness in film rather than in publishing (which is, in fact, typically a reversal of the actual situation) indicates that there may need to be a greater communications effort justifying, at least to the general public, expenditures in the publishing field.

At the same time, the fairly widespread perception that the television industry is in some financial difficulty suggests that protests resulting from any further cutbacks on funds to the CBC will likely find a responsive public ear. Certainly, this result combined with the earlier results relating to the CBC suggests that there is a considerable reservoir of public sympathy regarding the CBC.

Another approach to analysing the data pertaining to Canadians' perceptions of the financial health of the cultural industries is to compare these perceptions to information on the actual financial state of the various cultural industries in Canada. Table 12 juxtaposes the public perceptions against information provided to the Department of Communications on the financial health of various cultural industries. Comparing public perceptions to current reality is perhaps an even more significant contrast to draw from a policy and communications strategy development perspective, than ranking sectors in terms of their perceived relative degrees of strength. Looking at the survey data in this way reveals some potential communications challenges.

Table 12

FINANCIAL SITUATION OF CULTURAL INDUSTRIES

INDUSTRY	ACTUAL FINANCIAL RATING[1]	PUBLIC PERCEPTIONS Weak %	Strong %
Private radio	Strong (declining)	23	73
Music recording	Weak	36	60
Private TV	Very Strong	43	54
Book Publishing	Strong (improving)	40	53
Film	Weak	66	30

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

[1]See A Structural Study of the Canadian and Foreign-Owned Sectors of Cultural Industries in Canada by Coopers and Lybrand Consulting Group, presented to the Department of Communications, March 26, 1986.

Table 12 shows that public perceptions are fairly consistent with reality with respect to the perceived degrees of financial strength of the private radio, film making, and book publishing sectors. Public perceptions diverge somewhat from reality with regard to the private television and music industries. The television industry is not perceived as financially strong though, in fact, it is, and the music industry is seen to be much stronger than it really is. Eliminating this divergence between perception and reality presents a communications challenge for the government, particularly with respect to the music industry.

Consider the case of the music industry and the attitudes of younger Canadians (18-24 years old). They feel more strongly than other population subgroups that Canadian music and films (to a lesser degree) reinforce their sense of Canadian cultural identity. At the same time they are more likely to perceive the financial health of the Canadian music industry as strong than do other age groups. Perhaps because of this misconception, younger Canadians also feel less strongly than other groups that attending to the financial health of cultural industries will contribute to a strengthening of Canadian culture. At the same time, support for government financial support for cultural industries is highest among the young and Francophones.

Clearly, the communications challenge facing the government is to correct public misconceptions about the financial strength of the Canadian music industry, especially with respect to young Canadians for whom music is of disproportionate significance to their sense of Canadian culture.

Examining perceptions and reality pertaining to the television industry provides somewhat of a different perspective on any possible government policy initiatives. Table 12 illustrates that the Canadian public underrates the financial strength of the Canadian private sector television industry. While a reservoir of public sympathy may exist regarding the CBC, which may have relevance for government consideration of reductions in expenditures on the CBC, there may also be some potential for public support for policy initiatives directed toward the Canadian private sector television industry. Enlisting the private television sector in Canada in support of federal government broadcast policy initiatives is identified in the recent report of the Task Force on Broadcasting as a critical imperative. Correcting public misconceptions of the degree of financial strength of the private sector side of the Canadian television industry could contribute to the development of a basis for potential support for government initiatives to promote Canadian programming within the private sector, as distinct from the CBC. This implication arising from the survey data should be considered in the context of the federal government's evolving new broadcasting policy and the public communications imperatives related to it.

B. Government Financial Support

Perhaps, in part, because of some fears regarding the financial health of some of Canada's cultural industries, the need for possible government assistance to cultural industries appears supportable. Two-thirds of the respondents (62%) agree that the government should provide special financial support for these industries because they are vital to our sense of culture and identity.

Table 13

SHOULD GOVERNMENT
FINANCIALLY SUPPORT CULTURAL INDUSTRIES?

	PERCENTAGE
Government should support	62
Government should not support	38

This presents an interesting counterpoint to the previous findings in this survey which revealed that the majority of people claim to not receive their sense of identity from cultural industries. In spite of this, it is clear that the public still expects the government to support these industries based on their status as contributing factors to Canada's identity. This desire for support is strongest among Francophones, low-income earners and young people, and weakest among Western residents.

One explanation for this finding is the possibility that although many Canadians claim that cultural industries do not define their own sense of Canadian identity, there remains a sense that these industries have some importance for Canada's cultural identity and should be financially supported. The fact that many Canadians do not ascribe a major identity-defining role to our cultural industries also suggests that support for financial aid to these industries, while it exists, may be limited to support for small amounts of aid being provided. A further explanation for the public's support for financial aid for cultural industries is that 66% of respondents agree with the statement that "cultural industries employ a lot of people and contribute a lot to the economy." This point of view is held most strongly by lower scale respondents and less strongly held by the upper income respondents and residents of British Columbia.

C. Trade and Promotion Issues

A number of responses to questions in the survey have suggested that Canadians are feeling fairly confident, despite some financial concerns, about the abilities of Canadian artists and cultural industries and about the good quality of Canadian products. This is further illustrated by responses to a number of questions relating to trade and promotion issues.

There is strong agreement (76%) with the idea that "if we tried harder to sell our culture outside the country like the Americans do, we would be quite successful." Again, this view is more likely to be held by Francophones, women and downscale respondents, and less likely to be reported by the upscale and residents of British Columbia. Overall, there seems to be a general assumption that Canadian cultural products are marketable abroad, but a greater effort is needed to sell these products.

The variation in opinions among demographic groups on this question is of some significance in terms of communications challenges. Those highly educated, high-income Canadians less likely to agree with the statement are also disproportionately found within the ranks of high-level social activists. Any government initiative designed to promote and support the export of Canadian cultural products would benefit from having this influential segment of the population onside. Cultural Nationalists and PSIs are more likely to hold this view, while NNs, ANs and those who oppose state intervention (ASIs) are less likely to agree.

When asked why we don't sell as many cultural products abroad as other countries, the majority (58%) attribute it not to inferior products, but rather to not spending enough time or money to market products. This is a view shared equally by all social groups, although CNs and PSIs disproportionately hold this view. This again tends to affirm the notion that Canadians are increasingly confident about the quality of this country's cultural products.

Table 14

WHY CULTURAL PRODUCTS ARE NOT SOLD ABROAD

	PERCENTAGE
Don't spend enough time or money to market	58
Quality of our products not high enough	21
People in other countries not that interested	20

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

Further evidence for this perspective comes from responses to a question relating to one specific cultural industry. Fully 64% of the respondents agree with the statement that "Canadian book publishers should try to find and promote the books which will sell best regardless of whether the authors came from Canada or elsewhere." Cultural Nationalists and PSIs are less likely to agree with this statement while ASIs are more likely to agree. Earlier results, as noted, illustrate that Canadian products are perceived to have improved a lot in the past few years, and that the present quality is believed to be very good. A belief in the quality of Canadian books and authors is further demonstrated by this statement on the publishing field. The general perception appears to be that Canadian publishers should not take special measures to concentrate solely on this country's writers, perhaps because they do not require such protection. This suggests that Canadians, in general, do not feel especially threatened by foreign cultural products or publications, and that strong nationalist protectionist agreements are likely to be questioned by the public as unnecessary. The issue of the perception of threats to Canadian culture is explored in more detail in the following section.

IV. FOREIGN INVOLVEMENT IN CULTURE

A. Foreign Ownership: The Threat

The issue of foreign involvement in Canadian culture has received considerable recent attention in the media and among interest groups.

The question raised is an old one: To what degree does foreign involvement threaten Canadian identity and culture? It is this issue which is pursued first, since any understanding of attitudes to foreign activity in Canada must take into account perceptions of threat to Canadian culture and identity. At the present time, half of the population believe American cultural products pose a very serious (14%) or serious (36%) threat to Canadian identity. This suggests that there is certainly no consensus about the current impact of American culture.

Concern, however, does vary across the country, Francophone residents (68%) show a far higher level of concern than Anglophones (44%). Cultural Nationalists and those who favour positive state intervention (PSIs) are somewhat more likely to regard the sale of American cultural products as a serious threat. Ambivalent Nationalists and ASIs are less likely to see this as a serious threat and are more likely to view it as a not too serious threat. Those more likely to see the exposure as a serious threat include 55-64 year olds and individuals with an annual household income of $10,000-$20,000. On the other side, those less likely to perceive a serious threat are 25-34 year olds and those with annual household incomes of $30,000-$40,000. Little variation in response in provinces outside of Quebec is evident. This limited perception of threat does support the view advanced earlier that culture is not necessarily seen as the driving force of identity. Further, it also suggests that many Canadians may feel comfortable enough about their own identities to believe exposure to American culture will not undermine their own sense of Canadian identity.

Given that 73% believe Canadian culture has developed distinctive qualities, notwithstanding potential threats caused by exposure to other cultures, the data suggest that many believe the potential for threat always exists, although the threat is not perceived as strong at present.

Canadians, if they do at some time perceive a threat in this regard, would look to government for action. Furthermore, it is also clear that many people feel that this threat, while not immediate, is not imaginary; it has the potential to become a problem.

Not surprisingly, the perception of threat is associated with nationalist attitudes towards cultural industries. In other words, those who believe the threat is serious are far more likely to support Canadian ownership of all cultural industries and to agree that the government should financially support or oversee those industries. Furthermore, they support the belief that the continued strength of Canada's culture depends on Canadian ownership and believe that a threat to this ownership is a threat to the national identity.

While there is no great consensus as to the seriousness of the problem posed by American culture, neither is there widespread agreement that the level of American influence has increased in the past 10-20 years. A slight majority (56%), however, say it has, while one-third (31%) view it as about the same and 13% believe the American influence has actually decreased. The belief that American influence has increased is greatest among Francophones (62%). Further, this perception is also strongly related to a sense of threat; the greater the perceived threat, the more this threat is perceived to have increased. In summary, a clear pattern emerges which demonstrates that those who perceive the American threat as serious are also more likely to support the existence of Canada's cultural industries and the Canadian ownership of those industries.

B. Quebec's Perception of Threat

The strong conviction of Francophone residents regarding the importance of Canada's cultural industries is a consistent thread throughout the data. On almost every measure, Francophone respondents are significantly more positive on cultural industry issues. Moreover, they are distinctly more likely than Anglophone respondents to say American culture presented a present threat and a growing threat to Canadian identity. To examine this issue further, only the Quebec respondents were asked two questions pertaining specifically to the impact of foreign cultures on Quebec.

When asked specifically about Francophone culture, 67% of Quebec respondents (69% among Francophones) believe it is threatened by the dominance of other cultures, while the remaining 33% describe their culture as strong and vibrant.

Table 15

FRANCOPHONE CULTURE

	PERCENTAGE
Francophone culture is strong and vibrant	33
Francophone culture is threatened by the dominance of other cultures	67
If Response "is threatened": Culture Representing the Biggest Threat to Francophone Culture	
English (Canadian)	14
American	70
Both equally	16

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

As Table 15 illustrates, there is a significant fear of cultural domination among Francophones, and among those expressing this fear American rather than English Canadian influence is perceived as the greatest source of that threat. Those most likely to voice their fear of domination are upscale respondents. The perceptions of the source of the threat varies somewhat by age and education level. Younger and more educated Quebecers are more likely to cite American culture as the source of threat.

Overall, these results indicate that a very substantial number of Francophones are seriously concerned about the domination of Canadian culture, and specifically about Francophone culture, and that this threat is largely seen to emanate from the United States. The important fact here seems to be that English and French Canadians are united in their belief that the potential for domination does exist, although Francophones perceive the threat to be more serious than do Anglophones. At issue then is the preservation of both French and English Canadian culture from threats south of the border, rather than Francophone culture feeling threatened by the rest of Canada.

In general, the perception of any threat from outside cultures among Francophone respondents verifies the trend seen throughout the data that Francophones view a greater benefit than other Canadians from our cultural industries and they also demand they play a greater role. Subsequently, they also perceive a greater threat from a diminuition of government support and a greater need for efforts to restrain the foreign involvement in these industries.

C. The Perceived Extent of Foreign Ownership

In determining overall attitudes toward foreign involvement, it is useful to examine perceptions of the extent of current foreign ownership of cultural industries.

When this issue was put to respondents, as Table 16 indicates, there are clear differences by industry in perceptions of the extent of foreign ownership, although it seems clear that majorities of the population believe that at least half or more of all cultural industries are foreign controlled.

Table 16

PERCENT OF CULTURAL INDUSTRIES FOREIGN CONTROLLED

INDUSTRY	ALMOST ALL %	MORE THAN HALF %	HALF %	LESS THAN HALF %	ALMOST NONE %
Music	13	28	32	18	6
Film	13	25	31	18	10
Publishing	8	21	36	22	9
TV	9	19	30	23	16
Radio	6	14	28	25	23

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

Table 16 demonstrates that the music industry is perceived to be the industry receiving the greatest amount of foreign control, closely followed by the film industry. Canadian radio and TV industries are viewed as receiving the least outside control, with almost one-quarter of the respondents (23%) believing that the former receives almost no foreign control.

While regional and demographic differences in perceptions of the extent of foreign ownership tend to be minimal, there are a few interesting variations. In particular, less educated and lower income Canadians are more likely than the upscale to view radio and TV industries as foreign owned. This difference reflects the greater awareness of those of high SES standing upscale regarding the extent of foreign ownership of these particular media.

As presented above regarding the financial state of the cultural industries, public perceptions of the extent of foreign ownership of these sectors can also be compared to actual data provided by the Department of Communications. In contrast to the situation regarding the financial strength of the industries, Table 17 illustrates that public perceptions of the extent of foreign ownership in various cultural industry sectors are quite consistent with the foreign owned, while DOC data indicates that it is in facto less than 20% foreign owned.

Table 17

FOREIGN OWNERSHIP/CONTROL AND CULTURAL INDUSTRIES

INDUSTRY	ACTUAL % FOREIGN OWNERSHIP[1]	% PERCEIVING INDUSTRIES HALF OR MORE FOREIGN OWNED OR CONTROLLED
Private radio	Less than 20	48
Music recording	89	73
Private TV	Less than 20	58
Book publishing	77 (incl. Cdn. Co. imports)	
	63 (foreign Co. revenues)	65
Film	65-68	69

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

[1] Source: See Statistics Canada, Cultural Statistics Program (1985).

The fact that the rank ordering of foreign ownership roughly corresponds to the reality of foreign ownership may not indicate actual knowledge-based perceptions on the part of the public. Where income and education groups are in agreement regarding the perceived extent of foreign ownership, this suggests a certain amount of randomness. The differences noted above regarding radio and TV indicate that in those areas where knowledge regarding ownership is particularly limited, the downscale are much more likely than the upscale to overstate the extent of foreign control.

D. Threat of Foreign Ownership

As previously noted, the question of threat is an important element in shaping perceptions relating to cultural industries. This is particularly true in examining foreign ownership or control of these industries. Canadians believe that various forms of foreign ownership or control represent a degree of threat to Canada's ability to maintain and strengthen its culture.

Table 18

DEGREE OF THREAT OF FOREIGN INVOLVEMENT

	SERIOUS %	SOME %	NO THREAT %
Foreign ownership of cultural industries	37	47	15
Foreign ownership/control of distribution facilities, such as theatre chains or book stores	33	45	21
Foreign cultural products such as films, television programmes, and books being sold in Canada	20	43	36
Some foreign investment but not in control of cultural industries	13	48	38

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

Table 18 shows that the majority of the respondents view any type of foreign involvement as a threat, in some degree, to Canada's culture; however, majorities do not see these various threats as currently serious. Not surprisingly, more Canadians identify foreign ownership as a threat than the other potential threats identified in Table 18, but even here only 37% say this ownership represents a serious threat to Canada's ability to maintain and strengthen its culture. CNs, not surprisingly, are much more likely (47%) to consider foreign ownership a serious threat. PSIs are somewhat more likely to and ANs, NNs, and ASIs are less likely to see foreign ownership as such a threat. One-third of Canadians say foreign ownership of distribution systems represents a serious threat, although 48% of CNs regard this as a serious threat. Concern is less intense among ANs. Once again, this is not a significant proportion of the population and far from a strong mandate for positive steps to increase Canadian ownership. The most likely to perceive the threat as serious are Francophones and very low-income Canadians.

The other two potential threats cited in Table 18, some foreign investment (but not control) and the sale of foreign cultural products are not generally perceived to be serious threats. A significant proportion of the population, however, do constitute them as contributing some threat, but this suggests that the perception of some threat does not carry with it any belief in the need to either limit foreign investment in our cultural industries nor limit the availability of foreign cultural material. Women, Francophones, and Canadians with low income and education levels are most likely to indicate concern about the existence of some foreign investment but not control of cultural industries, with upscale Canadians least likely to be concerned. Canadians nearing retirement (55-65 years of age) and those with elementary school education are most likely to perceive a threat in the sale of foreign cultural products in Canada, with Anglophones and, once again, upscale Canadians least likely to perceive a threat.

Cultural Nationalists are more likely to regard the sale of foreign cultural products in Canada as a threat and this finding has some significance for government communications in the context of Canada-United States free trade. Access to the American market is the key Canadian objective and the findings of this survey indicate the public believes that some success could be achieved through greater effort devoted to marketing Canadian cultural products for export. With this as an objective of Canada, it is probable that the United States would expect reciprocal privileges in the Canadian market. A potential problem exists here for the Canadian government in terms of a source of opposition to this scenario among Cultural Nationalists. As noted above, CNs support the first step in the unfolding of this scenario (i.e., greater effort toward marketing Canadian cultural products in the United States) but either oppose or perhaps are insufficiently sensitive to the necessary quid pro quo. In light of this, any communications strategy should focus on this apparent trade off and lay out all of the pros and cons. This would not be preaching to the converted, as our data show that CNs perhaps do not sufficiently appreciate an important consequence of aggressive marketing of Canadian cultural products in the United States.

In summary, this data suggest that Canadians presently believe that our culture and identity are not under serious attack from the influence of American culture. From this perspective, it seems that no pro-active approaches are expected by the public, but if significant threats were to emerge, then action must be taken to protect Canadian culture and cultural industries. Canadians expect more of a new reactive mode from government.

Analysis of variations in opinion among demographic groups indicates, however, that some communications initiatives should be taken to allay the fears of some of the segments of the population. This will be particularly significant in the context of removing or at least neutralizing sources of potential public opposition to a Canada-United States free trade agreement.

E. Strengthening Canadian Culture

A further element in assessing Canadians' views related to the importance of ownership and control of Canadian cultural industries is the extent to which various things strengthen Canadian culture in the long run. In order to assess support for ways to strengthen Canadian culture, respondents were asked to rate the effect of three things on strengthening Canadian culture: having financially healthy cultural industries, ensuring that cultural industries are owned by Canadians, and having Canadians making most of the decisions about which cultural products are sold and distributed in Canada.

As Table 19 shows, there is massive agreement that each of these ways would have a great deal or somewhat of an effect on strengthening Canadian culture. In fact, a majority of Canadians say each would have a great deal of effect. Interestingly, somewhat more respondents believe that making decisions about cultural products would have a great deal more influence than owning cultural industries (60% to 53%). Demographic differences in response are minimal, although there is some regional variation, with residents of British Columbia remaining consistent in their lower than average support for any of these approaches. Prairie residents, on the other hand, are consistently above average. Cultural Nationalists are considerably more likely (77% compared to 60% in aggregate sample) to believe that the strength of our culture depends on Canadians making most of the decisions. Ambivalent Nationalists, on the other hand, are much more likely than Canadians as a whole (46% compared to 29% nationally) to say that this has only somewhat of an effect on the strength of Canada's culture in the long run.

Table 19

EFFECT ON CANADIAN CULTURE

	GREAT DEAL %	SOME-WHAT %	NOT TOO MUCH %	NOT AT ALL %
Canadians making most of the decisions about cultural products	60	29	8	3
Ensure cultural industries Canadian owned	53	34	10	3
Financial health regardless of ownership	52	36	9	2

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

Support for the control rather than the ownership option is apparent from responses to a further question, which asked respondents to choose, from among of the three methods discussed, the one which would do the most in the long run to strengthen Canada's culture (Table 20).

Table 20

FACTOR TO BEST MAINTAIN CULTURE

	AGREE %
Ensure Canadians make decisions about what products Canadians want and need	51
Encourage Canadian ownership of cultural industries	34
Ensure financial health of industries whether foreign of Canadian	14

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

Over half the respondents (51%) agree that ensuring that Canadians make decisions about cultural products would be the most effective way to strengthen our culture. This belief is constant throughout the demographic groups, although less likely shared by British Columbia residents. All categories of Cultural Nationalist and Interventionalist also reflect the trend evident in the aggregate data, identifying "ensuring Canadians make decisions about what products Canadians want and need" as doing the most to keep our culture strong in the long run. Of the five categories of nationalism and intervention we have developed, the option of Canadian ownership is most likely to be mentioned by CNs, but even in this group, control over decision-making (50%) is mentioned more frequently than encouraging Canadian ownership (38%). Ambivalent Nationalist and NNs, along with those opposing state intervention (ASIs), are even more likely than average to cite control over decision-making as the most effective contributor to the strength of Canadian culture in the long run (Table 21). Looking just at the "encouraging Canadian ownership of cultural industries" alternative, those respondents citing this as most significant, are, not surprisingly, drawn disproportionately from the ranks of the Cultural Nationalists (45% of CNs, compared to 40% of the aggregate sample).

Table 21

CULTURAL NATIONALISM AND STATE INTERVENTION
AND FACTOR TO BEST MAINTAIN CANADIAN CULTURE

KEY: CN= Cultural Nationalist; AN= Ambivalent Nationalist; NN= Non-Nationalist; PSI = Positive State Interventionist; ASI = Anti-state Interventionist

		AGREE				
	AGGREGATE	CNs %	ANs %	NNs %	PSIs %	ASIs %
Ensure Canadians make decisions about products	51	50	54	55	49	56
Ensure Canadian ownership of cultural industries	34	38	31	19	34	27
Ensure financial health	14	12	15	24	17	16

The implication that control is somewhat more important than ownership is, of course, a two-edged sword. In the first place, allowing foreign ownership of cultural industries would send a message to foreign investors and reinforce the "open for business" concept. At the same time, ensuring that Canadians have a significant say in the running of foreign controlled enterprises is both difficult to ensure and to police. Because the policy is not highly visible, in the sense that it can be seen to be operating, it will be open to accusations from nationalists that Canadians are, in fact, not running their own affairs.

What it emphasizes once again is that people seem a little reluctant, given the degree to which the threat is seen, in real versus potential terms, to move to some type of programme to stimulate Canadian ownership or restrict foreign investment. This is underscored by the fact that even among Cultural Nationalists, encouraging Canadian ownership is identified by only a minority as the initiative which could do the most to keep Canada's culture strong in the long run. Finally, the very limited support for the option of ensuring the financial health of industries, whether foreign or Canadian, as a means of maintaining Canadian culture, indicates that this is not an argument that can be used to justify foreign ownership of Canadian cultural industries.

F. Production and Distribution

While there is a desire for both control and ownership of cultural industries and while Canadians say control is more important than ownership in keeping our culture strong, the issue of the relative importance of controlling and/or owning production and distribution facilities remains to be examined.

In order to explore this issue, respondents were asked to rate the importance for Canadians' to own or control production or distribution functions. Results indicate that the plurality of respondents believe it is very important for Canadians to own or control both facilities (Table 22).

Table 22

IMPORTANCE OF CANADIAN CONTROL

HOW IMPORTANT IS IT FOR CANADIANS TO OWN OR CONTROL:	VERY IMPORTANT %	SOMEWHAT IMPORTANT %	NOT TOO IMPORTANT %	NOT AT ALL IMPORTANT %
Production such as in companies which make films, television or radio programmes, books or music	51	41	7	2
Distribution such as in companies which own movie, theatres, records, book stores	46	42	9	2

Note: Percentages may not sum to 100% due to rounding and the exclusion of "No Opinion."

The perception that it is very important that these two functions are controlled or owned by Canadians is significantly weaker among the upscale respondents, as well as residents of British Columbia and Ontario. Even these demographic groups, however, only shift down a degree in importance, to somewhat important. The perception is also weaker among ANs, NNs and ASIs. Francophones and older respondents, though, are more likely to hold the view that it is still very important for Canadians to control or own both these cultural functions as do CNs (61% production; 55% distribution) and PSIs (60% production; 54% distribution). The vast majority of respondents agree that it is important for Canadians to control the production and distribution facilities for cultural industries.

Furthermore, when asked if it suffices that Canadians have a strong influence over cultural industries and products, but do not actually own or control the telecommunication system which move these products around the country, over three-quarters of the respondents (78%) disagree with such an argument. They believe that we need to own or control these systems in order to maintain and strengthen our culture. This majority view is even more likely to be held by PSIs, CNs and downscale respondents, but less likely by residents of British Columbia, NNs and ASIs. The conclusion is that there is a definite view that it is necessary for Canadians to maintain control or ownership over all phases of the operations of the cultural industries in order to preserve Canada's culture.

G. Promotion of Cultural Industries and the Role of Government

While Canadians earlier appeared to reject the extreme nationalist view that Canadian book publishers should only promote Canadian authors, there is nevertheless some support for the view that Canadian owned companies should do more to promote Canadian products than should foreign owned ones. In all, 51% believe that cultural industries owned or controlled by foreign interests do less to promote Canadian culture than do Canadian-owned companies. Almost one-third (31%) believe they do "as much" and 15% report they do "more" to promote Canadian interests. The fact that close to half the respondents reflect this view suggests that many Canadians remain unconvinced either that Canadian cultural industries are better at promoting Canadian products than foreign-owned ones, or that Canadian industries do much in the way of promotion. It is notable that upscale residents and Prairie residents are more likely to believe foreign-owned cultural industries would do less, while British Columbia residents are slightly more likely to believe they would do "as much" to promote Canadian interests.

The implication of this is, of course, that any policies developed to allow greater ownership or control of Canadian cultural industries will be able to argue to some extent that Canadian culture is best promoted by Canadian-owned or controlled organizations. Although to do so completely convincingly may require evidence that Canadian cultural industries do more to promote Canadian culture than the foreign owned.

Ultimately, the promotion of Canadian culture is seen to be a responsibility of the federal government, although not necessarily exclusively. This is evident from the significant proportion of Canadians (71%) who agree that "the federal government has to oversee and ensure that the cultural industries, whether Canadian or foreign owned, operate in a way that helps promote Canadian culture." The remaining quarter (28%) voice the belief that the government should not try to oversee how these industries operate. The former view is more likely to be held by downscale respondents, as well as Francophones, older people, and women, while residents in British Columbia and the Prairies are more likely to hold the latter belief. It is not unexpected that upscale respondents are less supportive of the option of more governmental involvement, although a clear majority still favour it.

In summary, there is considerable indecision on the part of Canadians as to the seriousness of the foreign involvement today, although there is agreement that the level of threat is on the rise. The Francophone presence which has been evident throughout the data, culminates in the question of cultural domination and reinforces the perception of Quebec residents that Canada's cultural industries must be upheld and protected, as this protection may be the only chance for the survival of the Francophone culture.

Further, while a majority of Canadians believe that 50% or more of Canada's cultural industries are foreign owned, only a minority view the threat of foreign ownership as serious. In fact, another measure of the lack of importance that Canadians attach to the ownership issue is the finding that ensuring Canadian control over decisions about cultural products is the option chosen more often over encouraging Canadian ownership of cultural industry. This, however, may reflect Canadians' pragmatism regarding the ownership issue. In any case, Canadians believe that both production and distribution are equally important aspects to control or own.

Finally, the argument that Canadian companies do more to promote Canadian culture is only partly convincing to respondents, and while this argument can be used, some documentation may help to convince those who are at present unconverted.

V. FREE TRADE AND CULTURAL ISSUES

Although questions relating to free trade and the cultural industries were not asked in this survey, some light on the public's perceptions regarding this issue can be cast by exploring questions asked in December's Decima Quarterly.

When asked specifically about the inclusion of cultural industries in bilateral trade talks with the United States, it appears that Canadians are divided on the issue. Half of the adult population apparently does not feel that including these industries in negotiations would threaten Canadian cultural identity, but an almost equal number voices this belief. Furthermore, 61% of those who oppose including cultural industries in the trade talks would still do so, even if it meant concessions made through excluding these industries resulted in the loss of jobs in other sectors.

While these findings suggest that there is a degree of firm support for excluding cultural industries from the bargaining table, regardless of potential job costs, this only amounts to 30% of the total population.

Consistent with findings reported earlier in this study, British Columbia residents are most likely to favour including cultural industries in Canada-United States trade negotiations. Interestingly, on this issue Quebec residents feel little different from the rest of the country. When the threat of job loss is introduced, Ontario residents are the most likely to continue to oppose including cultural industries in free trade negotiations, while not unexpectedly, British Columbians are the least likely to continue their opposition.

Overall, these results confirm some of the findings discussed in this report: first, there is only a limited perception at this time that Canadian identity and culture is threatened by the United States, and second, Canadians, while agreeing that Canadian cultural industries help define Canadian identity, do not personally relate to Canadian culture as their main source for a feeling of what it means to be Canadian.

Given these two perceptions, it is not surprising that while there is some commitment to keep cultural industries away from the bargaining table, this commitment is undercut to some extent if jobs are threatened, and can only be seen to be firm for about a third of the population.

VI. CONCLUSIONS AND RECOMMENDATIONS

- Most Canadians are convinced that the country has a unique identity, and appear not to feel that it is severely threatened at the present time.

- There is widespread recognition that Canada's cultural industries play an important role in sustaining and extending Canada's cultural identity, but a substantial number do not accord these industries the major role in defining identity. Instead, the cultural industries are one among many factors at work. Cultural Nationalists (CNs) and Positive State Interventionists (PSIs) are more likely to believe that these industries reflect and reinforce and identify a distinctive Canadian culture. They disproportionately support the view that "the CBC plays a vital role in letting Canadians learn about themselves and be proud of themselves."

- Analysis of the survey data reveals a linkage between Canadians' sense of cultural nationalism and their orientation toward the appropriate role of the state. Cultural Nationalists (CNs) and Positive State Interventionists (PSIs) frequently hold similar perspectives on a range of policy questions pertaining to cultural sovereignty. Areas where these similarities are particularly evident include the perceived contribution of the cultural industries to a sense of Canadian culture and identify, a belief in the vital role of the CBC in reinforcing a sense of Canadian culture, a perceived threat associated with either foreign ownership and control in the Canadian cultural sector or the sale of foreign cultural products in Canada. Similar perspectives are also evident in their attitudes toward the quality of Canadian cultural industry products and the potential for their increased export. Crosstabular analysis also reveals that a majority of our sample of Cultural Nationalists (59%) are also included among the Positive State Interventionists.

- Since there is limited support for the view that cultural industries are the major sustainers of Canadian identity, there is limited support for steps to further protect Canadian cultural industries. <u>Decima Quarterly Report</u> data show that half of the population argue that these industries should be included in free trade talks with the United States.

- There is evidence of considerable pride regarding Canadian culture and its value and confidence in Canada's ability to withstand foreign competition. Cultural products are thought to be of good and of improving quality, and Canadians believe that they could be successfully exported if greater effort were devoted to their promotion.

- Further evidence of the lack of concern regarding threats to Canadian cultural identity comes from the fact that majorities of Canadians claim that half or more of various cultural industries are foreign owned and controlled. Public perceptions of the extent of foreign ownership in various cultural industry sectors are quite consistent with reality, with the exception of Canada's private television industry where the level of foreign ownership is perceived to be much higher than it actually is.

- There is recognition that some cultural industries are in poor financial shape, and public perceptions are fairly consistent with reality, except with respect to the private television and music industries. Canada's private television industry is not perceived to be as strong as it in fact is and the music industry is perceived to be much stronger than it really is. Eliminating this divergence between perception and reality presents a communications challenge for the federal government. There is support for government aid in the form of special financial assistance, although this may not mean higher funding levels will be established, but that existing support will be maintained.

- In providing other types of support or protection, Canadians are willing to accept an emphasis on Canadian control of decision-making regarding the production and distribution of cultural products if Canadian ownership cannot be secured. In this context, it would be important to demonstrate that Canadians are in control and make decisions, even if the industry is foreign owned. Attitudes do not vary from the national pattern on the basis of the various indices of cultural nationalism and state intervention.

- Ownership and/or control is equally important for both the production and distribution of cultural products.

- There is, in addition, some support for the marketing of Canadian products abroad. The public is, overall, sufficiently positive about Canadian cultural products to support some fresh marketing efforts. This might be especially effective if linked to the private sector and to products that are successful and could make money abroad. Any success in this area would further reinforce the view that Canadian cultural products are of high quality. A potential communications problem could emerge for the Canadian government in the context of the Canada-United States free trade negotiations and any aggressive effort by Canada to expand the export of cultural products into the United States and in the context of the Americans' likely expectation of reciprocal privileges in Canada. Consideration should, therefore, be given to appropriate communications efforts aimed at addressing this trade off in minister's speeches and other departmental communications with the Cultural Nationalist community in Canada.

- The greater perception of threat on the part of Francophones compared with Anglophones, suggests that greater sensitivity to cultural issues and foreign control must be shown where Quebec interests are directly at risk compared with the rest of the country.

- The free trade negotiations represent a potential problem in terms of the possible emergence of the perception of threat to Canadian cultural identity. If these negotiations might include cultural industries, there is a danger that fears for cultural independence might be aroused. This might occur through renewed media and arts groups' interest devoted to the subject, or if following a trade deal Canadian cultural industries were to be more heavily owned by American interests. It could also emerge in the context mentioned above in conjunction with any Canadian government accelerated cultural products export promotion initiatives, while the Canada-United States free trade negotiations are underway.

- Overall, the Canadian public seem reasonably satisfied with the present situation regarding cultural industries in Canada. In the absence of a strong perception of threat, there is no great level of support to implement any major programmes of change. The optimal response at present seems to be to indicate a willingness to defend Canadian cultural industries if a threat emerges, but to also indicate that there is no major threat at present, as well as to accelerate and intensify efforts to market Canadian cultural products abroad. Canadians feel confident about the quality of the cultural products made in Canada and reasonably confident of their ability to compete internationally. Such efforts should be made, however, on the basis of a recognition of the attendant potential risks entailed relating to the Canada-United States free trade discussions.

TECHNICAL APPENDICES

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APPENDIX

A. SURVEY OVERVIEW

Decima Research is pleased to present to the Federal Department of Communications, the results for a study designed to meet the following objective:

- o To examine Canadians' attitudes towards cultural industries, and their effectiveness at maintaining the national identity.

Senior Research Consultant and principal investigator for this study was Bruce Anderson who was assisted in the various phases of research and analysis by Mary Ellen Bernard.

1. Sample Selection

The population consists of all residents of Canada. Male and female respondents were selected in a different proportion as the general population, on a 50/50 sex quota. A total of 1,350 interviews were completed.

Effective survey research must be based on a sample truly representative of the universe of interest. A multi-stage sampling technique was employed to gather the data for this study. The essential feature of this procedure is that individual respondents are predetermined by the selection procedure itself. That predetermination is made by careful speculation of a series of controlled choices.

The sampling technique produced a systematic random sample with probability of selection proportionate to size at the level. The first step in the sampling procedure was the division into strata or "regions," i.e., (Table A). Table A presents the percentages of the total population and by the proportionate number of cases in each. The third column presents the disproportionate sample actually completed followed by the weights used in each region. The fifth column represents the number of cases in each strata after the weighting was applied.

Table A

SAMPLE STRATA

	PERCENTAGE OF POPULATION %	PPS N	DPS N	WEIGHTS	WEIGHTED N
REGIONS					
British Columbia	11	132	132	1.000	132
Alberta	9	108	108	1.000	108
Saskatchewan	4	48	48	1.000	48
Manitoba	4	48	48	1.000	48
Balance of Ontario	27	324	324	1.000	324
Metro	9	108	108	1.000	108
Quebec	26	312	462	.6753	312
New Brunswick	3	36	36	1.000	36
Nova Scotia	4	48	48	1.000	48
Prince Edward Island	1	12	12	1.000	12
Newfoundland	2	24	24	1.000	24
TOTAL		1200	1350		1200

Within each of these regions, a sampling procedure was employed which is based upon mapping the linkage between the geographic location of individual telephone exchanges and Statistics Canada's fundamental building block for the census -- the enumeration area (EA).

Telephone companies divide their service regions into smaller areas served by a single switching centre. Within each switching centre area, all telephone numbers begin with the same two digits. We refer to these mutually exclusive exchange areas as NNXs (NNX representing the first three digits of a telephone number). Using census data, together with maps showing the geographic boundaries of NNXs, it is possible to determine exact population figures for each NNX and determine the appropriate number of respondents to be surveyed in each NNX.

Primary sampling units (groups of NNXs) and secondary sampling units (individual NNXs) were selected on the basis of probability proportionate to population size. Telephone numbers were then generated using a computerized random number generation program employing random start and fixed interval methods.

2. Field Procedures

The questionnaires were printed, consecutively numbered, and assembled into field packs of three interviews -- two males and one female or two females and one male. This procedure ensured that the 50/50 sex quota would be met by preselecting males and females before the interviewing began.

The interviews took place between December 18 and 20, 1985 and weekday interviewing was conducted between the hours of 5:30 and 10:00 p.m. The questionnaire contained questions and took approximately 17 minutes to complete. Fifteen percent (15%) of all interviews were monitored while in progress for procedure and content from an extension monitor. All interviews were carefully edited as soon as they were completed to ensure that no questions were omitted and that skip-patterns were followed correctly.

Experienced telephone interviewers were used to collect the data. A briefing was held by the Field Supervisor and the Research Analyst was present to answer questions or clarify procedures. The Field Supervisor first read the questionnaire to the interviewers, thereby ensuring that pronunciation would be correct and uniform, and secondly, interviewer-respondent role-playing was used to illustrate skip and rotation patterns. The interviewers then had an opportunity to ask questions.

On the first evening in the field, the Research Analyst listened to the interviewers on an extension monitor. The monitor prevents the interviewer and respondent from knowing they are being listened to. This ensured that the skip and rotation patterns were followed correctly and that there were no questions causing interviewers any particular difficulty. When an error was caught, the interviewer was briefed again and the respondent was called back in order to correct the questionnaire.

All work was edited by the Senior Field Supervisor, checked for completeness, quality, and skip-pattern adherence. Then, 15% of each interviewer's work was verified; that is, respondents were contacted by telephone and were asked to verify that the interview actually took place. Respondents were also asked to answer a few questions from the questionnaire in order to check the accuracy of the data collected.

3. Coding

The questionnaires were coded and the data were entered by experienced Decima personnel. The following standard procedures were followed:

- An initial briefing;
- Supervision of trained staff; and
- Verification of 15% of each coder's work.

Using the first 25% of completed questionnaires in each stratum, codes were constructed for the open-end questions by sorting and writing out the responses into independent categories. The Research Analyst/Assistant checked all categories for completeness and consistency.

4. Data Processing

The entry and processing of the data were carried out on-site using Decima's Digital PDP 11/44 computer. Decima's interactive software system, designed specifically for survey analysis, has a robust data entry facility, which permits cleaning of the data, including out-of-range values and skip-pattern errors, as well as other logic errors. The fully cleaned data were then summarized into aggregate tables. Further analysis of the data included crosstabulation tables, measures of association, regression analysis, and factor analysis.

5. Confidence Limits and Validation

The weighted sample of 1,200 cases produces results which are accurate for the population of as a whole within ±2.9 percentage points 95 out of 100 times.

In order to validate the sample, we compared our data for the age categories of the population figures provided by Statistics Canada. Table B outlines the percentage of respondents in each age category for the sample, and the corresponding population figures. As these figures suggest, the sample drawn for this study reflects the more general characteristics of the adult population.

While the most sophisticated procedures have been used to collect and analyze the information presented herein, it must be remembered that surveys are not predictions. They are designed to measure public opinion within identifiable statistical limits of accuracy at specific points in time. This survey is in no way a prediction of opinion or behaviour at any future point in time.

Table B

SAMPLE VALIDATION

	WGTD SAMPLE (n=1,200) %	POPULATION (N=18,445,000) %
AGE		
18-19 Years	4	4.8
20-24 Years	12	13.0
25-29 Years	14	12.5
30-34 Years	14	11.4
35-39 Years	14	10.3
40-44 Years	10	8.1
45-49 Years	6	6.9
50-54 Years	8	6.8
55-59 Years	4	6.5
60-64 Years	7	6.0
65 Years or Older	8	13.5

Note 1: Source Catalogue 92-210 Post Census Annual Estimates of Population By Marital Status, Age, Sex and Components of Growth For Canada, Provinces and Territories June 1, 1984.

2. Added categories: 65-69, 70-74, 75-79, 80-84, 85-89, 90+

B. INTERVIEW SCHEDULE

A.	Are you 18 years of age or older and a resident of Canada?	YES (CONTINUE)................A NO (ASK TO SPEAK TO ELIGIBLE RESPONDENT, IF STILL "NO," THANK AND TERMINATE)........B	
B.	Have I reached you at your home phone number?	YES (CONTINUE)................A NO (ASK TO SPEAK TO ELIGIBLE RESPONDENT, IF STILL "NO," THANK AND TERMINATE)........B	
C.	Do you, or does anyone in your family or household work in the following kinds of business ...a market research firm, advertising agency, public relations firm, or the news media?	YES (THANK AND TERMINATE -- RECORD INCIDENCE ON CALL RECORD SHEET)...............A NO (CONTINUE).................B	

To start with I'd like you to tell me to what extent you feel such things as Canadian films, television and radio programs, books, and music help reflect or reinforce a sense of distinctly Canadian culture and identity. (ROTATE QUESTIONS 1-4)

1.	How about Canadian films... would you say they help a great deal, somewhat, not too much, or not at all?	A GREAT DEAL..................1	(19%)
		SOMEWHAT......................2	(44%)
		NOT TOO MUCH..................3	(25%)
		NOT AT ALL....................4	(11%)
		NO OPINION (VOLUNTEERED)......5	(1%)
2.	Canadian television programs, including, news, sports and entertainment?	A GREAT DEAL..................1	(42%)
		SOMEWHAT......................2	(43%)
		NOT TOO MUCH..................3	(11%)
		NOT AT ALL....................4	(4%)
		NO OPINION (VOLUNTEERED)......5	(*)

Note 1: Responses may not sum to 100% due to rounding throughout the Technical Appendixes.

2: (*) denotes a percentage value greater than 0 but less than 0.5 throughout the Technical Appendixes.

3. Canadian musicians and their music recordings?

A GREAT DEAL	1	(33%)
SOMEWHAT	2	(42%)
NOT TOO MUCH	3	(18%)
NOT AT ALL	4	(6%)
NO OPINION (VOLUNTEERED)	5	(1%)

4. Canadian authors and their books?

A GREAT DEAL	1	(40%)
SOMEWHAT	2	(39%)
NOT TOO MUCH	3	(14%)
NOT AT ALL	4	(5%)
NO OPINION (VOLUNTEERED)	5	(3%)

END OF ROTATION

5. Thinking of the the overall quality of these Canadian cultural products -- that is such things as books, records, movies, and television shows which are made in Canada -- would you say that they are excellent, good, only fair, or poor?

EXCELLENT	1	(11%)
GOOD	2	(55%)
ONLY FAIR	3	(31%)
POOR	4	(3%)
NO OPINION (VOLUNTEERED)	5	(*)

6. Some people say that because Canada has always been exposed to other cultures, like American, British, and French, we do not really have our own particular culture or identity as Canadians.

Others say that Canada does have its own sense of culture and identity which is quite different from those of other countries.

Thinking about these two points of view which one best reflects your own?

CANADIANS HAVE NO PARTICULAR CULTURE	1	(27%)
CANADIANS HAVE A DISTINCT CULTURE	2	(73%)
NO OPINION (VOLUNTEERED)	3	(1%)

The companies which produce or distribute films, television and radio programming, books and music are sometimes called our "cultural industries." I'm going to read to you a list of these cultural industries, and for each one I'd like you to indicate whether you think their financial situation is very strong, strong, weak or very weak. How about...(ROTATE QUESTIONS 7-11.)

7. The private sector Canadian radio industry.

VERY STRONG	1	(12%)
STRONG	2	(61%)
WEAK	3	(21%)
VERY WEAK	4	(2%)
NO OPINION (VOLUNTEERED)	5	(5%)

8. The Canadian film making industry.

VERY STRONG	1	(4%)
STRONG	2	(26%)
WEAK	3	(59%)
VERY WEAK	4	(7%)
NO OPINION (VOLUNTEERED)	5	(4%)

9. The Canadian book publishing industry.

VERY STRONG	1	(5%)
STRONG	2	(48%)
WEAK	3	(37%)
VERY WEAK	4	(3%)
NO OPINION (VOLUNTEERED)	5	(6%)

10. The private sector Canadian television industry.

VERY STRONG	1	(9%)
STRONG	2	(45%)
WEAK	3	(39%)
VERY WEAK	4	(4%)
NO OPINION (VOLUNTEERED)	5	(6%)

11. The Canadian music recording industry.

VERY STRONG	1	(13%)
STRONG	2	(47%)
WEAK	3	(33%)
VERY WEAK	4	(3%)
NO OPINION (VOLUNTEERED)	5	(4%)

END OF ROTATION

12. Some people say that because these industries are vital to our sense of culture and identity, the government should provide special financial support for them. Other people say that even though these cultural industries are important to the country, the government cannot really afford to provide them with special financial support. Thinking of these two points of view, which one of them best reflects your own?	GOVERNMENT SHOULD SUPPORT.....1	(62%)
	GOVERNMENT SHOULD NOT SUPPORT.....................2	(38%)
	NO OPINION (VOLUNTEERED)......3	(1%)

And to what extent would you say each of these different industries is owned or controlled by interests outside the country? I'm going to read you the list of these cultural industries and for each one please tell me whether you feel there is almost all foreign ownership and control, more than half, about half, less than half, or almost no foreign control...(ROTATE QUESTIONS 13-17.)

13. The private radio industry in Canada	ALMOST ALL....................1	(6%)
	MORE THAN HALF................2	(14%)
	ABOUT HALF....................3	(28%)
	LESS THAN HALF................4	(25%)
	ALMOST NONE...................5	(23%)
	NO OPINION (VOLUNTEERED)......6	(5%)

14. The film making industry in Canada	ALMOST ALL....................1	(13%)
	MORE THAN HALF................2	(25%)
	ABOUT HALF....................3	(31%)
	LESS THAN HALF................4	(18%)
	ALMOST NONE...................5	(10%)
	NO OPINION (VOLUNTEERED)......6	(4%)

15.	The book publishing industry in Canada	ALMOST ALL....................1	(8%)
		MORE THAN HALF................2	(21%)
		ABOUT HALF....................3	(36%)
		LESS THAN HALF................4	(22%)
		ALMOST NONE...................5	(9%)
		NO OPINION (VOLUNTEERED)......6	(6%)
16.	The private television industry in Canada	ALMOST ALL....................1	(9%)
		MORE THAN HALF................2	(19%)
		ABOUT HALF....................3	(30%)
		LESS THAN HALF................4	(23%)
		ALMOST NONE...................5	(16%)
		NO OPINION (VOLUNTEERED)......6	(6%)
17.	The music recording industry in Canada.	ALMOST ALL....................1	(13%)
		MORE THAN HALF................2	(28%)
		ABOUT HALF....................3	(32%)
		LESS THAN HALF................4	(18%)
		ALMOST NONE...................5	(6%)
		NO OPINION (VOLUNTEERED)......6	(3%)

END OF ROTATION

18.	Is it your impression that these type of companies, when they are owned or controlled by interests outside of Canada do more, just as much, or less to promote Canadian culture as Canadian companies do?	MORE..........................1	(15%)
		JUST AS MUCH..................2	(31%)
		LESS..........................3	(53%)
		NO OPINION (VOLUNTEERED)......4	(2%)
19.	There are a number of things which can help strengthen our culture. How much do you feel the strength of our culture depends in the long run on having financially healthy cultural industries, regardless of whether they are owned or controlled by Canadians. Do you think it depends... (READ LIST)	A GREAT DEAL..................1	(52%)
		SOMEWHAT......................2	(36%)
		NOT TOO MUCH..................3	(9%)
		NOT AT ALL....................4	(2%)
		NO OPINION (VOLUNTEERED)......5	(3%)

20.	How much do you think the strength of our culture depends in the long run on ensuring that the cultural industries are owned by Canadians (READ LIST)?	A GREAT DEAL....................1 SOMEWHAT.......................2 NOT TOO MUCH...................3 NOT AT ALL.....................4 NO OPINION (VOLUNTEERED)......5	(53%) (33%) (10%) (3%) (1%)
21.	How much do you think the strength of our culture depends in the long run upon Canadians making most of the decisions about what cultural products such as films, books and recordings are sold and distributed in Canada? Do you think it depends...(READ LIST)	A GREAT DEAL....................1 SOMEWHAT.......................2 NOT TOO MUCH...................3 NOT AT ALL.....................4 NO OPINION (VOLUNTEERED)......5	(60%) (29%) (8%) (3%) (1%)
22.	Of these three things, which one do you think can do the most to keep our culture strong in the long run... (ROTATE ORDER) ensuring the financial health of cultural industries whether they are foreign or Canadian, encouraging Canadian ownership of cultural industries, or ensuring that Canadians make decisions about what products Canadians want and need?	ENSURING THE FINANCIAL HEALTH OF CULTURAL INDUSTRIES WHETHER THEY ARE FOREIGN OR CANADIAN..................1	(14%)
		ENCOURAGING CANADIAN OWNERSHIP OF CULTURAL INDUSTRIES.2	(34%)
		ENSURING THAT CANADIANS MAKE DECISIONS ABOUT WHAT PRODUCTS CANADIANS WANT AND NEED.....................3	(51%)
		NO OPINION (VOLUNTEERED)......4	(1%)

23. Some people say that the federal government has to oversee and ensure that the cultural industries, whether Canadian or foreign owned, operate in a way that helps promote Canadian culture, such as encouraging them to sell a certain amount of Canadian products.

Others say that the government should not try to oversee how these industries operate, and that the companies should not have to offer any Canadian products for sale.

Thinking of these two points of view, which <u>one</u> best reflects your own?

GOVERNMENT SHOULD OVERSEE	1	(71%)
GOVERNMENT SHOULD NOT OVERSEE	2	(28%)
NO OPINION (VOLUNTEERED)	3	(*)

Now, I'm going to read you a list of statements various people have made at one time or another. I'd like you to tell me how you personally feel about each statement by giving me a number between -5 and +5, where -5 means you totally disagree with the statement, and +5 means you totally agree with the statement. Many people's opinions fall somewhere in between these two points depending on how they feel about the statement. The first statement is...(ROTATE STATEMENTS 26 - 32...READ FIRST STATEMENT...REPEAT SCALE INSTRUCTIONS IF REQUESTED) Where would you place yourself on this scale?

TOTALLY DISAGREE					DEPENDS					TOTALLY AGREE
-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5

		MEAN RATING
24.	The people who are talking about Canadian culture in the media these days do not seem to be talking about any of the sorts of things I'm interested in.	0.23
25.	If we tried harder to sell our culture outside the country like the Americans do, we would be quite successful.	2.26
26.	The cultural industries employ a lot of people and contribute a lot to the economy.	1.53
27.	I think the CBC plays a vital role in letting Canadians learn about themselves and be proud of themselves.	2.67
28.	Canadian book publishers should try to find and promote the books which will sell best regardless of whether the authors come from Canada or somewhere else.	1.31
29.	I don't really get my sense of Canadian identity from movies, books, music, television and things like that.	0.42
30.	I think the quality of Canadian cultural products such as books, films, radio, television and music recordings has improved a lot in recent years.	3.03

END OF ROTATION

31. Different people have offered different reasons why we do not sell as many of our cultural products in other countries as we would like to. Which of the following do you think is the most important reason...(READ LIST)?

WE DO NOT SPEND ENOUGH MONEY OR TRY HARD ENOUGH TO MARKET OUR PRODUCTS	1	(58%)
THE QUALITY OF OUR PRODUCTS IS NOT HIGH ENOUGH	2	(21%)
PEOPLE IN OTHER COUNTRIES ARE NOT THAT INTERESTED IN US	3	(20%)
NO OPINION (VOUNTEERED)	4	(1%)

"ASK Q32-33 OF QUEBEC SAMPLE ONLY"

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32. Which of the following best describes your view of the situation facing our Francophone culture ...(ROTATE)

is it a strong, vibrant culture and we don't need to worry about other language cultures dominating it,

OR

it is threatened by the dominance of other cultures?

IT IS A STRONG, VIBRANT CULTURE AND WE DON'T NEED TO WORRY ABOUT OTHER CULTURES DOMINATING IT (SKIP TO Q34)	1*	(33%)
IT IS THREATENED BY THE DOMINANCE OF OTHER CULTURES (GO TO Q33)	2	(67%)
NO OPINION (VOLUNTEERED)	3	(1%)

IF "IT IS THREATENED" TO Q32, ASK;

---

33. Which culture do you think represents the biggest threat to the Francophone culture?

ENGLISH (CANADIAN)	1	(14%)
AMERICAN	2	(70%)
BOTH EQUALLY (VOLUNTEERED)	3	(14%)
OTHER (VOLUNTEERED)	4	(2%)
NO OPINION (VOLUNTEERED)	5	(*)

34. From time-to-time, different people have said that we are so close to the United States and are exposed to so much of their culture in the form of books, movies, television and music recordings that we are in danger of losing our sense of Canadian identity. At the present time would you say this exposure to foreign products is a very serious problem, a serious problem, not too serious a problem, or no problem at all?	VERY SERIOUS..................1 SERIOUS.......................2 NOT TOO SERIOUS...............3 NO PROBLEM AT ALL.............4 NO OPINION (VOLUNTEERED)......5	(14%) (36%) (36%) (14%) (*)
35. Compared to how things were 10 or 20 years ago do you think that the level of American influence has increased, decreased, or is it about the same as it was in the past?	INCREASED.....................1 ABOUT THE SAME................2 DECREASED.....................3 NO OPINION (VOLUNTEERED)......4	(56%) (31%) (13%) (1%)

There are different levels of foreign involvement which can take place in things which affect our culture. I'd like you to tell me for each of the following, whether you think it would pose a serious threat, some threat, or no threat to Canada's ability to maintain and strengthen its culture? (ROTATE QUESTIONS 36-39)

36. Foreign ownership of cultural industries.	SERIOUS THREAT................1 SOME THREAT...................2 NO THREAT.....................3 NO OPINION (VOLUNTEERED)......4	(37%) (47%) (15%) (1%)
37. Some foreign investment but not control of cultural industries.	SERIOUS THREAT................1 SOME THREAT...................2 NO THREAT.....................3 NO OPINION (VOLUNTEERED)......4	(13%) (48%) (38%) (1%)

38.	Foreign cultural products such as films, television programs, and books being sold in Canada.	SERIOUS THREAT................1	(20%)
		SOME THREAT...................2	(43%)
		NO THREAT.....................3	(36%)
		NO OPINION (VOLUNTEERED)......4	(1%)

39.	Foreign ownership or control of the distribution facilities in Canada, such as theatre chains or book stores.	SERIOUS THREAT................1	(33%)
		SOME THREAT...................2	(45%)
		NO THREAT.....................3	(21%)
		NO OPINION (VOLUNTEERED)......4	(1%)

END OF ROTATION

Different companies are involved in different types of work in the cultural industries. For each I'd like you to tell me how important you think it is for Canadians to own or control each of these two main functions?

40.	Production such as in companies which make films, television and radio programs, books or music.	VERY IMPORTANT................1	(51%)
		SOMEWHAT IMPORTANT............2	(41%)
		NOT TOO IMPORTANT.............3	(7%)
		NOT AT ALL IMPORTANT..........4	(2%)
		NO OPINION (VOLUNTEERED)......5	(*)

41.	Distribution such as in companies which own movie theatres, record or book stores.	VERY IMPORTANT................1	(46%)
		SOMEWHAT IMPORTANT............2	(42%)
		NOT TOO IMPORTANT.............3	(9%)
		NOT AT ALL IMPORTANT..........4	(2%)
		NO OPINION (VOLUNTEERED)......5	(*)

42.	Some people say that as long as Canadians have a strong influence over cultural industries and products, it's not that important for us to actually own or control the telecommunications systems such as satellites and telephone lines which are used to move these products around the country. Others say that we need to own or control these telecommunications systems as well, in order to really be able to maintain and strengthen our culture. Thinking of these two points of view, which <u>one</u> best reflects your own?	NO NEED TO CONTROL............1 NEED TO CONTROL...............2 NO OPINION (VOLUNTEERED)......3	(21%) (78%) (1%)
43.	Do you subscribe or buy on a regular basis any Canadian magazines?	YES...........................1 NO............................2 NO OPINION (VOLUNTEERED)......3	(57%) (43%) (0%)
44.	How much of the TV programming that you watch is Canadian ...(READ LIST)?	LESS THAN ONE-QUARTER.........1 ONE-QUARTER...................2 ONE-HALF......................3 THREE-QUARTERS................4 EVERYTHING....................5 DON'T KNOW DIFFERENCE (VOLUNTEERED)...............6 NO OPINION (VOLUNTEERED)......7	(21%) (28%) (27%) (15%) (7%) (2%) (1%)

Now, I have a few final questions for statistical purposes...

45. What is your age, please? (IF RESPONDENT REFUSES, OFFER TO READ CATEGORIES AND HAVE HIM/HER TELL YOU WHICH CATEGORY HE/SHE FALLS INTO)

18-19 YEARS	01	(4%)
20-24 YEARS	02	(12%)
25-29 YEARS	03	(14%)
30-34 YEARS	04	(14%)
35-39 YEARS	05	(14%)
40-44 YEARS	06	(10%)
45-49 YEARS	07	(6%)
50-54 YEARS	08	(8%)
55-59 YEARS	09	(4%)
60-64 YEARS	10	(7%)
65 YEARS OR OLDER	11	(8%)

46. Are you currently attending school, college, or university as a full-time student?

YES	1	(8%)
NO	2	(92%)

47. What is the highest level of schooling that you have completed?

PUBLIC/ELEMENTARY SCHOOL (GRADE 1-8)	1	(8%)
SOME HIGH SCHOOL	2	(22%)
GRADUATED HIGH SCHOOL (GRADE 12 OR 13)	3	(34%)
VOCATIONAL/TECHNICAL/ COLLEGE/CEGEP	4	(14%)
SOME UNIVERSITY	5	(9%)
GRADUATED UNIVERSITY	6	(14%)

48.	Which of the following income groups includes your annual household income? (READ CHOICES)	LESS THAN $ 5,000............01	(3%)
		$ 5,000 - $ 9,999............02	(8%)
		$10,000 - $14,999............03	(11%)
		$15,000 - $19,999............04	(11%)
		$20,000 - $24,999............05	(16%)
		$25,000 - $29,999............06	(12%)
		$30,000 - $34,999............07	(10%)
		$35,000 - $39,999............08	(8%)
		$40,000 - $44,999............09	(5%)
		$45,000 - $49,999............10	(5%)
		$50,000 AND OVER............11	(11%)
49.	Sex. (BY OBSERVATION)	MALE........................1	(50%)
		FEMALE......................2	(50%)
50.	Language of questionnaire	ENGLISH.....................1	(76%)
		FRENCH......................2	(24%)

C. DERIVATION OF NEW VARIABLES

51. PROVINCE

was derived from questionnaire identification numbers. The resulting categories were labelled as follows:

1.	BRITISH COLUMBIA;	(11%)
2.	ALBERTA;	(9%)
3.	SASKATCHEWAN	(4%)
4.	MANITOBA;	(4%)
5.	BALANCE ONTARIO;	(27%)
6.	METRO;	(9%)
7.	QUEBEC;	(26%)
8.	NEW BRUNSWICK	(3%)
9.	NOVA SCOTIA	(4%)
10.	PRINCE EDWARD ISLAND; and	(1%)
11.	NEWFOUNDLAND.	(2%)

52. REGION

was derived from Q51 by collapsing response categories in the following manner:

Q51	Q52	
1	1. BRITISH COLUMBIA;	(11%)
2 - 4	2. PRAIRIES;	(17%)
5,6	3. ONTARIO;	(36%)
7	4. QUEBEC; and	(26%)
8 - 11	5. MARITIMES.	(10%)

53. COMMUNITY SIZE

was derived from questionnaire identification numbers. The resulting categories were labelled as follows:

1.	1,000,000 AND OVER;	(29%)
2.	100,000 - 999,999;	(27%)
3.	10,000 - 99,999; and	(10%)
4.	UNDER 10,000/RURAL.	(35%)

54. QUEBEC VS OTHER

was derived from questionnaire identification numbers. The resulting categories were labelled as follows:

1. QUEBEC; and (26%)
2. OTHER (74%)