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CANADIAN VIEWS AND ATTITUDES

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Prepared by:
Nathalle Chamberland
Strategic Policy Planning
Strategy and Plans Branch
Communications Canada

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INTRODUCTION

The following document is a summary of polling data gathered by DGSP throughout 1992. Published since 1990, this report is aimed at providing information on the views and attitudes of Canadians toward socio-economic issues, as well as issues pertaining to the Department of Communications.

The 1992 edition is divided in four chapters: chapter one focuses on socio-economic issues, and more particularly Canadians' perception of the state of the economy, the government, and social change. Chapter two takes a closer look at technologies and the telecommunications industry. Chapter three focuses on heritage and cultural industries. Chapter four provides information on the role of the media in our society and presents some of the results of the **Reading in Canada 1991** study, which was published by the Department of Communications during the summer of 1992.

The enclosed highlights are a combination of statistical and polling data from the Goldfarb Report 1992 and Environics Focus Canada, substantiated with John Kettle's Futureletter, media coverage, as well as letters written by individuals to the Department of Communications.

The Goldfarb Report is an annual trend data service of a socio-political-economic nature. It identifies, measures and tracks trends or shifts in public attitudes and behaviour over time. The 1992 survey was based on 1,650 interviews conducted throughout Canada in January 1992, with a follow-up survey in August. Some extra questions were submitted by the Department as part of the questionnaire and the results have been published in the Goldfarb Report.

<u>Environics Focus Canada</u> is a survey of public attitudes toward public policy issues, and political, economic and social trends. Environics publishes four times a year and their survey includes a sampling of approximately 2,012 adult Canadians interviewed inhome.

<u>John Kettle's Futureletter</u> is a monthly newsletter reviewing current topics of interest to Canada. It informs readers of various key issues concerning demography, the economy, the labour force, etc., as well as tracking trends over time.

If you have any questions or require further information, please contact Nathalie Chamberland at 990-6820.

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1. THE MOOD OF THE COUNTRY

1.1. Top Ten Issues of Concern to Canadians

Economic-related issues remained, again in 1992, at the top of the list of major issues of concern to Canadian. Goldfarb and Environics' reported a noticeable increase in most issues from 1991 data.

MOST IMPORTANT ISSUES OF CONCERN	INDEX OF CONCERN (Maximum 100)			
	1991	Jan. 1992	Aug. 1992	
Unemployment	78	89	81	
Level/Rate of Government Spending	86	88	81	
Taxation Level	84	88	78	
Extent of National Debt	84	87	78	
The Goods and Services Tax	75	86	69	
Condition of Economy	77	85	75	
Inflation	76	79	63	
Constitutional Debate and National Unity	62/65	69	61	
Free Trade Agreement	67 .	N/A	62 U.S and Mexico	
Foreign Influence on Canada's Culture Through TV/books/music	44	44	N/A	

Source: Goldfarb - The Goldfarb Heport 1992

The recession continues to have a profound effect on Canadians. It is clear throughout the media coverage and the data gathered by Environics and Goldfarb throughout 1992 that Canadians do not believe the recession is over. Even though newspapers across the country reported blooming sales for retailers in the aftermath of the 1992 Holiday season, Environics' December 1992 Focus Canada survey results suggest that the recession is deeply anchored in the consumer's mind. According to Environics, 95% of Canadians still believe the recession is not over.

Economic recovery continues to be sluggish and Canadians are still hesitant to spend money. There have been a number of well-publicized company closures, cutbacks and bankruptcies in the past year that have shaken a lot of people. The mental state in which Canadians find themselves is reflected in their behaviour as citizens; Canadians are still uncertain about the future. The December 1992 Environics Focus Canada study reveals that 68% of Canadians (up 13 points since September) believe the economy is getting weaker. Pessimism about the economy is consistent across the various regions of the country, as 66% interviewed believe the economy of their province was weakening.

Many have stated that this recession is now clearly tougher than the 1981-83 recession, and that was the worst since the depression of the 1930s (John Kettle's Futureletter, September 1992). The Goldfarb report 1992 shows that even though Canadians feel uncertain about the future of the country, their personal economic situation still comes first. Canadians want the government to focus on the economy.

The Environics December 1992 Focus Canada survey also noted an Increase since June 1992 in the proportion of Canadians who name the economy (42%) as the most Important problem facing Canada. Concern over unemployment remains constant at 30% since June. Poor government/leadership stands at 6%, while issues over national unity plunged 11 points since September, now standing at a low 4%. The environment follows at 3%, concern over the deficit (3%), taxes (2%) and social issues (1%).

1.2 Constitutional Overload

Polls Indicate that Canadians have lost patience with the whole issue of the Constitution, particularly in the face of the economic situation. According to Environics, Canadians are ready to put the issue aside and want the government to focus on the economy.

What do we do next?

The December 1992 Focus Canada survey asked Canadians what they thought the government should do next, in the aftermath of non-successful referendum. The results showed that *68% of Interviewed Canadians said there should be no new discussions*. Only 14% of Canadians said that we should try to reach a new agreement.

Reasons For Voting "YES" or "NO"

A study conducted by Environics in December 1992 found that the "YES" and "NO" advertising campaigns had a lesser impact on the population's intention to vote than it was first thought. However, the study provided some interesting insight on the population's motivations to vote "YES" or "NO" during the referendum.

REASONS FOR VOTING "YES"	% OF ADULT CANADIANS
Keep the Country Together	69
Deal is a Good Compromise	55
To End Constitutional Debate	48
Bad Economic Consequences of "NO" Vote	43

Source: Environics Focus Canada, December 1992

Environics found that *the most Important motivation for the population to vote "YES" was their concern for keeping the country together (69%)*, followed by a sense that the deal was a good compromise (55%), and a desire to end the constitutional debate (48%). Concern over the impact of the deal on the economy remained last, with 43%.

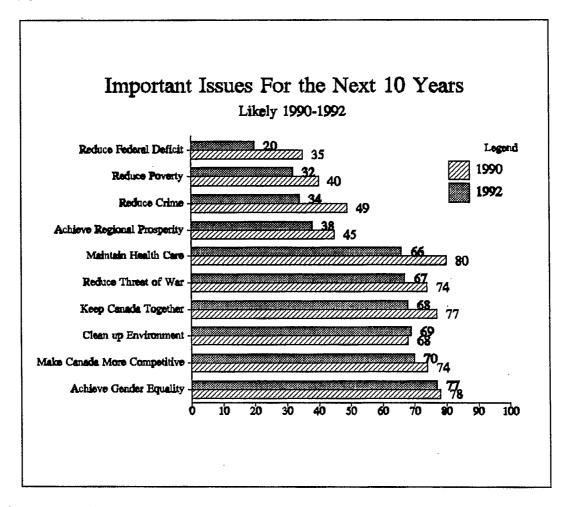
REASONS FOR VOTING "NO"	% OF ADULT CANADIANS
Quebec gets too little	21
Dislike Prime Minister	24
Concern with Aboriginal Proposals	30
Dislike politicians	37
My province gets too little	42
Deal is too complicated	. 47
Would not end debate	50
Quebec gets too much	52
Not a good agreement	73

Source: Environics Focus Canada, December 1992

On the other hand, 73% of Canadians who voted "NO" thought that it was mainly a bad agreement, that Quebec got too much (52%), that the deal would not end the constitutional debate (47%) or that it was too complicated (42%).

The study also revealed that 70% of interviewed Canadians said the "NO" vote made no difference on the state of the economy. According to Environics the "fear factor" did not have the impact on Canadians that many expected. Although the "YES" forces did not succeed in convincing Canadians that a "NO" vote would destroy the country, a substantial minority of the public did believe that such a vote could have a negative impact on the economy. Even in Quebec, it was felt that economic concerns should take priority over political ones.

1.3 Important Issues for the Next 10 Years



Source: Environics Focus Canada - September 1992

According to Environics, the recession, along with Canada's national unity crisis, have cast a cloud over Canadian optimism about the future in many areas of national life. A majority of Canadians are optimistic about Canada's ability to solve six out of ten problems facing the country over the next decade. At least two-thirds of the public believe that Canada will be very or somewhat likely to achieve equality between men and women (77%), make products that are more competitive in world markets (70%), clean up the environment (69%), keep the country united (68%), reduce the threat of world war (67%) and maintain its health care system (66%) over the next decade.

Optimism is low about Canada's ability to bring prosperity to all regions of Canada (38%), reduce crime (34%), reduce poverty (32%) and reduce the federal deficit (20%). The June 1992 Focus Canada survey showed, however, that over eight in ten Canadians believe that many of these goals are very important to pursue over the next decade.

1.4 Public Perception of the Government

Goldfarb reported in August 1992 that Canadians' opinion of the federal government had not changed since last summer, and that it had somewhat softened since January 1992.

% OF ADULT CANADIANS						
KIND OF JOB FEDERAL GOVERNMENT IS DOING	JAN. 1990	AUG. 1990	JAN. 1991	AUG. 1991	JAN. 1992	AUG. 1992
Excellent	3	2	2	-	1	1
Good	14	10	9	7	6	9
Fair	45	36	33	36	32	34
Poor	37	52	55	57	61	56

Source - Goldfarb - The Goldfarb Report Update 1992

However, an Environics Focus Canada study, which was conducted in November-December 1992 showed the situation changed after the referendum, as the popularity of the government took a plunge down to 19%. Only 12% of interviewed Canadians interviewed approve of the Prime Minister's performance.

The rejection of the Charlottetown accord on October 26 has not helped the federal government to improve its image in the eyes of Canadians. For many, the outcome of the Referendum is a reflection of the government's overall performance during its current mandate. In general, polls show that Canadians have lost confidence in their government, which they blame in part for the economic and constitutional mess the country is in. Canadians see the country's economic crisis reflected in their own lives and do not believe the current problems are short-term in nature. Data suggests that people don't like what the government is doing, and they don't believe the government is telling them the truth. There is a broad dissatisfaction with the government across all regions of the country.

Environics suggests that since June 1989, taxation has been the policy area that has attracted the strongest public criticism. Only 13% of Canadians approve of federal economic policies and fully 83% are critical of the government's management of the economy. Trend data suggests that a meaningful increase in approval scores will have to await a significant economic turnaround. With Canadians generally unhappy with most federal government policies, it follows that many also believe the government is not paying sufficient attention to what the public wants (Environics Focus Canada, June 1992).

The government's strategy for fighting inflation, and the tactics used to execute that strategy did not work in the minds of many Canadians. And while Canadians feel strongly against the GST, data indicate that if people knew where the revenue from the GST was going, they would accept the tax more readily. It is however perceived to be a "tax grab" by a government they believe has failed to manage its budget.

1.5 Cut Budget, Not Services

Goldfarb and Environics both suggest that Canadians are prepared to cut spending on anything that does not interfere with their lives directly. *If it meant taxes could be held down, many Canadians would be prepared to limit financial assistance to the arts, recreation/lelsure programs, and tourism development programs.* Some areas where cuts would be welcome include:

- * size of the civil service;
- * spending on bilingualism programs;
- * financial assistance to recreation/leisure programs;
- * financial assistance to the arts/culture:
- * tourism development programs;
- * the frequency of home mail delivery;
- * the extent of construction on new roads:
- * the frequency of garbage collection.

According to the 1992 Goldfarb report, trend data suggest that Canadians are becoming more realistic about the kinds of programs the government can continue to finance, i.e. family allowance, health care, etc.

However, an Environics Focus Canada survey, which took place in November-December 1992, revealed that while Canadians want the government to limit or cut spending, they also want to maintain spending on social services.

The current negative attitude toward government has meant even more Canadians are moving away from the view that the federal government should get directly involved in the free market system. Canadians want to see government back away from direct involvement, and leave the marketplace to business.

1.6 Does Canadian-made Mean Better Quality?

In evaluating the whole issue of Canadian-made versus foreign-made *Canadians do not necessarily believe that Canadian-made means better quality.* They are not convinced that the manufacturing sector in Canada is capable of producing the quality the world wants, at a competitive price. There is a growing sense that Canadians must participate in the global economy if we are to survive. At the same time, Canadians are not convinced the country can effectively compete on the world market. Environics reported in the summer that *there had been a dramatic increase since 1990 in the proportion of Canadians who say making Canadian business more competitive is a very important goal for Canada (81%).*

There have also been *increases in the proportion who believe that the main responsibility for improving Canada's competitiveness lies with governments (35%).* There have been decreases in the proportions who hold employers (19%) or workers (9%) primarily responsible. One-third say the responsibility should be shared (35%).

There is a strong consensus that the need to remain internationally competitive means it will be necessary for Canadians to get job retraining (96%), accept relocation to find employment (73%), keep wage demands down (72%) or accept reductions in government social programs (60%). However, majorities believe it will not be necessary for Canadians to work longer hours (64%) or accept reductions in employee benefits (53%).

Ninety-five percent (95%) of Canadians who took part in the Environics Focus Canada survey between May and June of this year think that the telecommunications industry is important for the Canadian economy in the future.

1.7 Is Free Trade Good for Canadians?

Environics reported in its June 1992 Focus Canada study that there had been slight Increases In the proportions of Canadians who agree there should be free trade between Canada and the U.S. (44%), who favoured the free trade agreement that has been negotiated between Canada and the United States (28%), and who agreed that there should be free trade between Canada, the United States and Mexico (28%).

Canada - United States Free Trade Agreement

Opinion about the free trade agreement was divided from the time the agreement was first presented to the Canadian public in 1987 up until late 1990. Support for the agreement reached one of its lowest points just before the November 1988 Election, when it fell to 31 percent, and its highest point in its "honeymoon peak" of 47 percent in December 1988. However, since early 1991 and the onset of the recession, opposition began increasing steadily until it reached its highest level of 69 percent in March 1992. Support has been increasing since then, but remains low.

Trilateral Free Trade Agreement (NAFTA)

Goldfarb reported in August 1992 that concerns about Canada - United States relations have heightened since the previous summer - perhaps as a result of the trilateral free trade negotiations. The trilateral free trade negotiations between Canada, the United States and Mexico is making Canadians very nervous, as they already perceive themselves as the big losers of the deal. The Canada-US free trade deal has created many bitter disputes between the two countries since its implementation and *Canadians are not convinced that a trilateral deal would strengthen Canada's position in the International market*.

Since June 1991, Canadians have closely followed the evolution of the negotiations between the three countries and have expressed their constant support for Communications Minister Perrin Beatty's efforts to protect Canadian cultural industries.

On August 12, 1992 Canada, the United States and Mexico signed a draft North American Free Trade Agreement (NAFTA). Environics' September 1992 Focus Canada survey results show that 31 percent of Canadians support trilateral free trade, which represents an increase of three points from June and ten from March.

in some product categories, such as computer software and hardware, and books and magazines, Canadians are comfortable that the Canadian product is as good as the foreign competition. In other cultural categories, like TV and movies, the Canadian product is considered to be inferior to the foreign product. This is part of the reason for the lack of enthusiasm for Canadian cultural products; if Canadians do not believe the quality is there, they are not going to accept the cultural product simply on the basis of it being Canadian. According to John Kettle's Futureletter, "In services - public or private - customers get more demanding, not more satisfied, as the quality of the service improves" (May 1992)

1.8 Social Changes

Canadians would welcome certain social changes. Trend data suggests that in some respects, Canadians are expressing a desire for more structure to society, and less freedom for the individual.

	% OF ADULT (CANADIANS
SOCIAL CHANGES YOU WOULD WELCOME	1991	1992
Including the right to privacy in the Canadian Constitution	N/A	68
More emphasis on Canadian cultural products and identity	55	55
Speeding up the rate of technological change	44	51

Source: Goldfarb - Goldfarb Report 1992

According to Environics, trend data suggest that "Today's Canadians are expressing a new kind of social consciousness and a greater sense that the individual can make a difference. But, although Canadians are more committed than ever to creating and maintaining a certain "quality of life", there will not be a return to the idealism of the 1960s. The expression of social consciousness in the 1990s will be primarily local and egocentric, rather than global and altruistic. Canadians seem to feel that the quality of their lives is being threatened. The stresses inherent in living In a rapidly changing society - with a weakened economy and a physical environment that's under siege - are taking their psychological toli. The enthusiasms of the late 1980s are being tempered by a desire to slow things down. Canadians are searching for ways to balance the values of the "me generation". They are looking for greater stability and calm in their lives."

This desire for balance will make the values and symbols of more traditional times seem attractive and comforting. According to Environics, there is no likelihood of a return to the traditional lifestyles of the 1950s. The changes in attitudes and mores initiated during the social revolution of the 1960s have become part of the Canadian social fabric and are here to stay (Environics - Looks in the '90s, Fall 1992).

2. TECHNOLOGY AND TELECOMMUNICATIONS

2.1 The 10 technological tendencies

According to the John Kettle's Futureletter, technology has 10 characteristics or tendencies:

- 1. it reduces work loads
- 2. but it increases skills;
- 3. it decentralizes work
- 4. but it centralizes people;
- 5. it reduces costs
- 6. but it increases value:
- 7. it democratizes institutions
- 8. but it isolates people;
- 9. it expands time
- 10. but it shrinks space.

2.2 Coping with Technological Change

Technology continues to intrigue people, particularly young people, and the data suggest some consumers will be buying in order to stay on the leading edge of technology.

Over the past decade or so, there has been a slow but steady increase in the proportion of consumers who are comfortable with the changing computer technology. As they become more familiar with technology, they are less likely to feel threatened or intimidated by it. Older people, those with less education and those not in the labour force in particular do not seem to be moving forward as fast as the rest of the society. There is clearly a segment which is being left behind as the workplace and the marketplace becomes technologically advanced. Those who do not take or make the opportunities to become even a little familiar with technological advances are going to be left out as technology becomes more deeply entrenched in the home. According to John Kettle's Futureletter, "technology stands for independence, self-sufficiency and choice - the dominant values of the post-industrial culture" (April 1992). In the future, almost no large crowd will exist for more than a few hours. The concert performance, sports event, and festival will be a long time spent together for people who work remotely, individually, temporarily.

Some companies have been making increased use of automation and computerization in the workplace, and Canadians clearly feel it has had a positive impact, particularly for people working in banks, offices, supermarkets and factories. *It is not as clear what the impact has been on people working in the arts.*

According to the 1992 Goldfarb Report, Canadians clearly believe that automation has improved product quality and, to a lesser extent, the quality of the service they receive as consumers. Again, this points to the philosophical acceptance of the benefits of computerization. Despite the fact that Canadians believe computerization has improved productivity and service, there continues to be some concern that automation has also increased price.

As Canadians become more familiar with the different applications of technology they are increasingly impressed with what they see. They view such things as ATMs, computerized cash registers, automatic pumps at the gas station and computerized controls in automobiles as very positive advancements for the consumer.

2.3 Ownership

The incidence of ownership of a personal computer has almost doubled over the past seven years. Moreover, those who own a PC are using it more often, and for longer periods of time than they used to. The home PC is becoming a more basic part of the household than it was a few years ago. Male and female household heads are those family members most likely to be using a PC at home. PCs are being more widely used for word processing, bookkeeping and for doing work at home.

Among Canadians overall, 22% have a personal computer in their home. But...

among people with an income of \$60,000 or more -	48% own a PC
among people with some university education or more -	40% own a PC
among people 35 to 49 years of age -	32% own a PC
among dual income households -	32% own a PC
among couples with children under 17 -	30% own a PC
among males who work -	30% own a PC
among home owners -	26% own a PC

Of those who own a personal computer 82% also own a printer and 28% also own a modem. The increased incidence of modems in particular is going to greatly expand the use to which home computers are put.

	% OF ADULT CANADIANS		
OWNERSHIP (AT HOME) OF	1991	1992	
Personal Computer	20	22	
Modem for the PC	20	28	
Answering machine	30	38	
Facsimile machine	2	2	

Source: Goldfarb - The Goldfarb Report 1992

Personal ownership of a facsimile machine is very low and does not appear to be growing. An in-home fax is not something which very many perceive a need for as yet. Answering machines, on the other hand, have virtually doubled in the last two years. Close to four in ten (38%) now have an answering machine in their home. Those segments most likely to have an answering machine in their home include: those with at least some university education; those with household incomes of \$60,000 or more; females who work; people in the 25-34 age group and those who work full-time.

2.4 <u>Telephone Equipment: Phone Ownership / Rental</u>

The proportion who own one or more phones may have peaked in 1991. For the fourth consecutive year ownership of car phones has not changed. The car phone market is unlikely to grow to any great extent in the next year with 78% of non-owners suggesting that it is not at all likely that they will get a car phone and fewer than last year (6%) saying they are even somewhat likely to get a car phone in the coming year. Close to one in ten (8%) Canadians own a portable cellular phone and one in four Canadians own a cordiess phone.

	% OF ADULT CANADIANS		
PHONE OWNERSHIP	1991	1992	
Number of phones owned No phones owned Own 1 phone Own 2 phones Own 3 or more phones	23 28 27 22	23 28 28 21	
Number of phones rented No phones rented Rent 1 phone Rent 2 phones Rent 3 or more phones	41 41 14 4	41 44 12 3	
Number of car phones None One Two Three or more	93 5 1 -	94 3 1	
Number of portable cellular phones None One Two Three or more	 	91 6 1	
Number of cordless phones owned None One Two Three or more	- - - -	73 24 2 -	

Source: Goldfarb - The Goldfarb Report 1992

2.5 Home Telephone Services

Among telephone owners, call waiting is the most popular service to have on their home telephone, followed by speed call.

WHICH OF THE FOLLOWING SERVICES DO YOU HAVE ON YOU HOME TELEPHONE?	TOTAL CANADA % OF ADULT CANADIANS
Call waiting Speed call Call forwarding Cail display Call return Call screening Call trace	32 26 12 7 5 4 3

Source: Goldfarb - The Goldfarb Report 1992

2.6 Frequency of Telephone Use

In recent years, the number of local personal phone calls Canadians make each day seems to have increased. However, the number of business long distance calls per week seems to have declined.

USE OF THE TELEPHONE	1991	1992
Average Number of Personal Local Calls Per Day	3.6	3.4
Average Number of Personal Long Distance Calls Per Week	0.1	0.1
Average Number of Business Long Distance Calls Per Week	2.7	2.4

Source: Goldfarb - The Goldfarb Report 1992

2.7 Concern About Rates

According to the 1992 Goldfarb Report, the degree of concern over basic service and long distance rates has not changed to any great extent over the years. About one in two Canadians are concerned about rates to some degree, while the remainder are either a little concerned or not concerned at all about rates. If anything, Goldfarb reported a slow decline of Canadians who were concerned with telephone rates before the CRTC rendered its decision on Unitel's application to enter the long distance market on June 12, 1992.

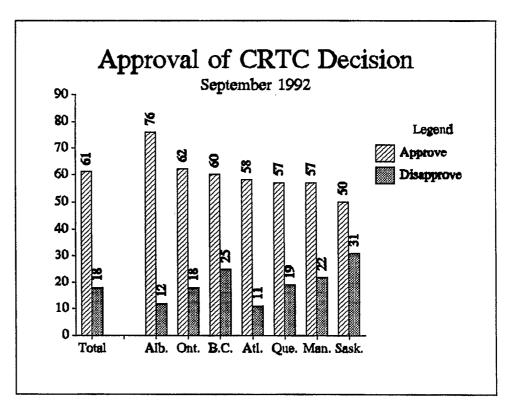
	% OF ADULT	CANADIANS
REACTION TO TELEPHONE RATES	1991	1992
Degree of concern about basic rates for telephone service Concerned Not concerned	80 20	78 22
Degree of concern about long distance rates Concerned Not concerned	82 18	80 20

Source: Goldfarb - The Goldfarb Report 1992

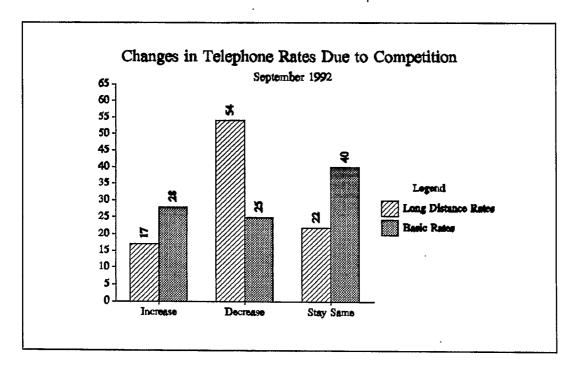
However, the Department of Communications received much correspondence from Individuals In the West of the country, expressing their opposition to the deregulation of the telephone industry. With an impending decision from the CRTC on the application by Unitel/BC LightTel and the tabling of the federal telecommunications in the House of Commons, there was a resurgence of correspondence on this matter in the beginning of December 1991. Residents of British Columbia and Saskatchewan wrote In large numbers to express their concern over the possible increase of local service rates, which were largely discussed by newspapers all across the country. These individuals were concerned that the quality of the telephone service would decrease with a possible deregulation of the telephone industry. The preservation of a universal, affordable and high quality service remained their main concern. DOC received nearly 250 letters on the issue from April 1991 to April 1992.

In the aftermath of the tabling of Bill C-62 in the House of Commons, DOC received a substantial number of cards from individuals protesting Bill C-62. Environics' September 1992 Focus Canada survey results suggest, however, that Canadians in general approve of the CRTC's decision to allow for competition in long distance telephone service. While most Canadians believe long distance rates will decrease as a result of competition, they are divided about the effect of competition on local rates. According to Environics, 58 percent of Canadians were aware of the CRTC ruling as of September, while 39 percent were not aware and three percent were uncertain.

According to Environics Focus Canada, six in ten Canadians (61%) approved of the competition ruling in September, while two in ten (18%) disapproved. Alberta residents strongly approved the ruling.



Source: Environics Focus Canada - September 1992



Source: Environics Focus Canada - September 1992

Canadians are less optimistic about the effect of competition on basic telephone rates. An estimated (40%) believe rates will remain the same. Among those who believe rates will change, virtually equal numbers say that these rates will increase (28%) as say they will decrease (25%). Seven per cent (7%) are uncertain.

3. HERITAGE AND CULTURAL INDUSTRIES

3.1 Preservation of Heritage and Existence of Cultural Facilities/Activities

In every region except Quebec, the preservation of Canadian heritage is considered more important than the preservation of one's own ethnic heritage. That is, the Canadian Identity is important to most people. However, over the past year, a declining proportion in Quebec believes the preservation of the Canadian culture is important, and the preservation of the individual's ethnic culture has taken precedence.

While it is clearly important to Canadians that cultural facilities and activities exist, these things do not seem to be quite as important this year as they have been in the past. This might be due in part to the economy, as people suggest that the arts is one area in which government could cut back spending in order to keep taxes down. It is important to note, however, that 60% of Canadians overall do not believe there are enough Canadian cultural products being made available to Canadians. This suggests that it is not that people don't want cultural products, but rather that they are taking second priority to other economic concerns.

	% OF ADULT CANADIANS		
IMPORTANCE OF GANADIAN CULTURAL PRODUCTS AND FACILITIES	1991	1992	
Importance of having cultural facilities in your community	90	87	
Importance of having access to Canadian cultural products	. 86	86	
Importance of being able to attend Canadian performing arts activities	75	67	
Importance of existence of Canadian performing arts groups	. 77	72	
Importance of having access to/being able to attend visual arts exhibits	N/A	69	

Source: Goldfarb - The Goldfarb Report 1992

3.2 <u>Time Spent with Cultural Activities</u>

Satisfaction with time spent pursuing cultural activities, to a large extent has not changed since tracking began. Canadians do not feel they are spending enough time pursuing their hobbies, reading Canadian books, attending theatres and museums or visiting libraries.

	ABOUT I AMOUNT TIME		NOT EI TIME	NOUGH
ARE YOU CURRENTLY SPENDING THE	% OI	FADULT	CANADI	ANS
AMOUNT OF TIME YOU WANT TO SPEND	1991	1992	1991	1992
Hobbies	35	34	47	45
Reading Canadian Books	29	27	33	33
At theatres	19	17	35	33
At museums	13	12	35	33
At libraries	24	25	32	32
At art galleries	11	10	30	27
At symphonies	10	9	25	24
Working with a personal computer	11	12	22	21
Watching Canadian TV	53	50	20	18
Listening to Canadian radio	57	57	17	16
At dance/ballet recitals Source: Goldfarb - The Goldfarb Report 1992	9	9	19	16

Source: Goldfarb - The Goldfarb Report 1992

Quebeckers, single females, young adults and upscale Canadians are most likely to feel they are not spending the amount of time they would like to seeing the performing arts. Upscale Canadians are most likely to regret the lack of time they currently spend visiting museums and art galleries.

	% OF ADULT CANADIANS				
% WHO SAY THEY ARE NOT SPENDING ENOUGH TIME AT	THEATRE	SYMPHONY	BALLET/ DANCE RECITALS	Museums	ART GALLERIES
Among Canadians overall: BUT	33	24	16	33	27
In Quebec	44	34	20	-	-
Among single females	42	34 37 32	20 26 22	-	-
Among people with incomes over \$60,000	44	32	22	41	36
Among people with university education	46	37	26	44	40
Among people aged under 25	39	32	22	-	-

Source: Goldfarb - The Goldfarb Report 1992

To some extent the economy may be influencing participation in selected activities since the proportion partaking in entertainment activities has been declining for the last few years.

	AVERAGE NUMBER OF TIMES PER YEAR	
EXTENT OF DOING SELECTED ACTIVITIES	1991	1992
Leisure Activities Work at artistic pursuits such as painting, drawing, for fun Play a musical instrument	6 10	5 8
Entertainment Go to the movies	. 7	7
Cultural Pursuits Go to a crafts fair Go to a live play/theatre Visit an art gallery or museum Buy a work of art Go to an arts festival Go to a pop or rock concert Go to a ballet, opera or symphony Go to a dance studio/dancing lessons Go to the library	3 2 2 1 1 1 2 11	3 2 1 1 2 1 2 14

Source: Goldfarb - The Goldfarb Report 1992

3.3 Movies

Canadians viewed slightly more movies in 1992 than they did in 1991, with the average person having attended five movies this year. Comedy remains the genre of choice, followed by drama, adventure and action films.

VIEWING HABITS OF THOSE ATTENDING MOVIES	1991	1992
Frequency of Attending Movie Theatres Several times a week Once a week 2-3 times a month Once a month 2-5 times in six months Once every six months Less often than once in six months Never	- 2 5 7 12 14 29 30	1 3 4 7 9 14 31 31

Source: Goldfarb - The Goldfarb Report 1992

Young adults are the primary movie goers. In an average year, Canadians under 25 attend movie theatres twelve times. This segment is most interested in comedies, action films, dramas, adventure films and spy/thrillers. Family movies are preferred by people aged 35-49, while musicals are preferred by people over age 65.

A minority (10%) of Canadians consciously attends Canadian films. Among those who choose to see Canadians films, the largest proportion see only one or two in a year.

Not only do adults under 25 watch more movies than the rest of the population, they also watch more Canadian films than people in other age categories. *Three In ten Canadians under 25 watched at least one Canadian film In 1992, down from four in ten last year.*

The largest single proportion of Canadians waits to see newly released movies on video-cassette. People under age 25, however, are more inclined to see newly released movies in the theatre - 30% of this segment see new releases at a cinema. People over 50, on the other hand, tend to wait for movies to come on TV before they see them; they do not feel the same urgency to see new releases. Canadians of all ages claim to have seen more movies in the past year on video than in the movie theatre.

3.4 Music

The majority of Canadians perceive the quality of Canadian music to be comparable to that of other countries. Canadians across the country share this common perception, and this has not changed over time.

	% OF ADULT	CANADIANS
ATTITUDES TOWARDS CANADIAN MUSIC	1991	1992
Views on the quality of Canadian music in comparison to foreign artists Canadian music is better quality Canadian music is equal equality Canadian music is worse quality	7 79 14	9 78 11
Do you make a conscious effort to buy music produced by Canadian artists? Yes No	23 76	24 75
Availability of Canadian music to find and purchase Very difficult Somewhat difficult Somewhat easy Very easy	5 27 43 19	4 28 46 19

Source: Goldfarb - The Goldfarb Report 1992

One in four Canadians overall make a conscious effort to buy music by Canadian artists. This proportion is highest in Quebec where 38% try to buy music by Canadian artists. Quebeckers are likely more inclined to purchase Canadian music because of their loyalty to French Canadian artists. Difficulty finding Canadian music may be one reason Canadians are not buying more locally produced music.

The frequency of listening to recorded music did not change in 1992 nor did the frequency with which recorded music is purchased. However, of the types of recorded music purchased, CD's continue to grow in popularity at the expense of LP's in particular and, to a lesser extent, cassette tapes.

Young adults under the age of 25 are the primary purchasers of recorded music. Of this age group, 23% consider themselves to be regular shoppers of recorded music and 32% claim to have purchased more than ten recordings this past year. Of those people who bought recorded music in the past year, most purchased a cassette tape. This proportion is lowest among younger adults who are more inclined than older Canadians to purchase CD's. The largest proportion of LP recordings sold in the last year were sold to Canadians over the age of 65. Even so, only 28% of this age group believe they purchased an LP last year.

About one in two overall make copies of original sound recordings. The frequency of doing so may have increased slightly over the last year. The incidence of copying recorded music tends to be higher among younger adults and particularly so among those under 25.

Most people are likely to record their friends' recordings or their own recordings. People over age 65 are also quite likely to record music playing on the radio or television.

Trend data suggests that few Canadians prefer to listen solely to the radio. Instead, they prefer to listen to a mix of radio and recorded music. The shift away from radio is strongest among young people who seem to be opting to listen to recorded music. It is the population aged 50 and older who most strongly favour listening to a combination of radio and recorded music.

3.5 Books

According to Goldfarb, trend data reveal *little change in the Canadian book Industry*. The proportion purchasing books or visiting book stores has remained virtually the same over the last few years.

	% OF ADULT CANADIANS	
BOOK PURCHASING BEHAVIOUR	1991	1992
Purchase Hardcover Book Never Once or twice a year Three or four times a year Five or six times a year Once a month or more often	47 37 8 5 4	45 37 9 4 3
Purchase a Paperback Book Never Once or twice a year Three or four times a year Five or six times a year Once a month Twice a month Once a week or more often	29 28 15 14 5 4	30 30 14 12 6 4 4

Source: Goldfarb - The Goldfarb Report 1992

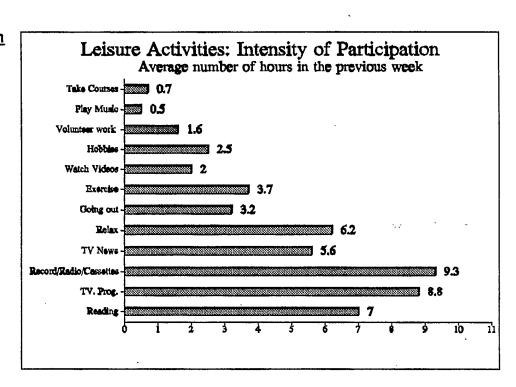
3.6 <u>Libraries</u>

The Goldfarb report 1992 suggests that the use of the library seems to have increased slightly in 1992 with 53% of Canadians having taken a book out of the library in the past year and 7% having used the library once a week or more often. Over time, however, Canadians seem to be generally less interested in reading. According to Goldfarb, the average number of books read has declined since 1984, as has the proportion belonging to a book-of-the-month club.

During the summer of 1992, the Department of Communications released the results of a survey on the reading habits of Canadians. Their sample consisted of nearly 7,000 Canadians aged fourteen and over. Directed by Ekos Research, <u>Reading in Canada 1991</u>

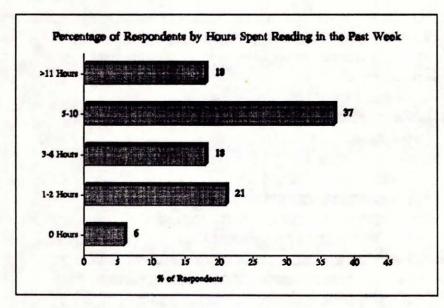
was designed to provide a controlled comparison of the state of reading in Canada in 1991 with a comparable survey conducted by Statistics Canada in 1978. The results showed that the vast majority of Canadians read for pleasure. Moreover, they read quite frequently and devote a very substantial chunk of their discretionary time to reading.

Indeed, Reading in Canada 1991 found that reading occupies a central and impressive place in leisure time use. It is the third most time consuming activity, following television and listening to music. According to **Reading in** Canada 1991, nearly one out of every six hours of discretionary time is devoted to reading.



Source: Reading in Canada 1991

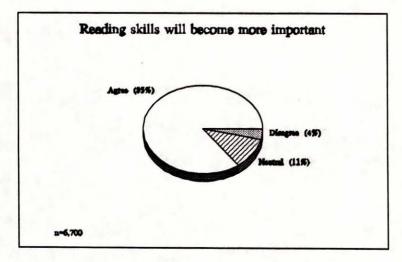
The following figure gives a basic distribution of the sample across various categories of pleasure reading in the past week. The figures are quite remarkable and contrast sharply with the results of the Goldfarb 1992 Survey and the current conventional wisdom that many Canadians are either incapable or uninterested in reading for pleasure.



On average, Canadians claimed to have read (for pleasure) about seven hours in the past week. Only six per cent read nothing in the past week and this figure drops to 1.5 per cent when asked if they read for pleasure in the past year.

Source: Reading in Canada 1991

According to Reading In Canada 1991, the vast majority of Canadians believe that "good reading skills will become more important in the "next decade" (see figure below). The growing strategic importance of reading to Canadians is even more vividly revealed in their views on the importance of transmitting reading skills to the next generation. Only about one per cent of Canadians disagree with the statement that "it is important that a parent read to their young child".



Source: Reading in Canada 1991

3.7 Public Ownership of Cultural Industries

Close to one in two Canadians support the privatization of each of Canada Post, Petro-Canada and Via Rail. *Goldfarb reports an increase over the past four years in the proportion who would support the sale of the CBC to the private sector.* However, DOC has received much correspondence from individuals expressing their opposition to cutbacks in CBC funding over the past two years. For instance, when CBC Chairman Gérard Veilleux announced on December 5, 1990, his plans to restructure the CBC, which involved the closures of several local stations, more than 3,600 Canadians wrote to the Minister to express their discontent with the closures of those stations and the cancellation of some of the programming. DOC has also received more than 9,700 cards and 94 petitions.

There have also been slight fluctuations in terms of the industries in which Canadians would like to see more government ownership. In good times, the issue of Canadian ownership becomes more important; in hard times the issue becomes slightly less important. The current data show a decrease over the past couple of years in the proportion who would like to see greater Canadian ownership of resource industries like oil refining, or oil and natural gas exploration and development, and cultural industries like music recording and book publishing. At this point in time, the industries (those relevant to DOC) in which the largest proportion of Canadians should like to see greater Canadian ownership include:

	% OF ADULT CANADIANS		
SHOULD BE MORE CANADIAN OWNERSHIP IN	1991	1992	
High technology industries	52	48	
Film producing	48	43	
Electronics industry	45	42	
Music recording	43	38	
Book publishing	47	41	
Broadcasting	39	35	
Telephone communications	36	34	
Cable T.V.	37	34	

Source: Goldtarb - The Goldtarb Report 1992

According to Goldfarb, Canadians want the industries producing cultural products to be Canadian owned, but don't think they are. It is at least somewhat important to Canadians that the industries which produce cultural products be owned and controlled by Canadians. However, it is important to note that only 42% overall describe this as 'very important'. This suggests, as other data do, that the issue is not only ownership, but quality of the products which are produced. That is, Canadians do not want Canadian ownership for its own sake. They want Canadian ownership only when they are sure that Canadians are capable of producing a quality product.

4. THE ROLE OF THE MEDIA

4.1 <u>Television</u>

According to the 1992 Goldfarb report, Television continues to stand out as the dominant medium both in terms of the impact that it is perceived to have on society and in terms of its importance to consumers. Television stands out well ahead of the other media sources as the medium which:

- * is the most powerful in influencing people's attitudes or way of life;
- * is the most influential advertising medium;
- * is the most sensational;
- * is the most important to people;
- * is the medium people would be most reluctant to lose for a year, or even a week;
 - * contributes most to the Canadian identity;
 - * produces advertising that people respond to most;
 - * is most important for Canada's writers/performers;
 - * contributes most to Canadian unity;
 - * is most honest in its reporting.

Moreover, trend data indicates that, over the past decade, television has become even more important to people. There has been a significant increase in the proportion of Canadians who identify television as the medium which is most important to them and as the medium they would be most reluctant to lose.

However, there is some indication television might be losing some of its image for being society's conscience.

4.2 Quality of Canadian Programming

Canadians have held consistent impressions of the quality of Canadian programming over time. One in two (53%) perceive American programming to be superior to Canadian programming. Of all types of Canadian programming, the Canadian public perceives news programming to be of the highest quality with 85% of Canadians rating the news to be good or excellent quality. Other categories of Canadian programming are rated fair to good quality. Trend data suggests, however, that Canadian TV news' image might be slipping. At the same time, there is slow growth in the perception that Canadian-produced dramas are good quality.

The proportion of Canadians owning Cable TV has continued to grow since 1981 and does not appear to be losing momentum. However, the proportion with channel converters seems to have peaked two or three years ago.

	% OF ADULT	% OF ADULT CANADIANS		
INCIDENCE OF CABLE TV	1991	1992		
Have Cable TV	75	80		
Have Channel Converter (% of those on cable)	64	61		
Planning to get Cable TV (% of those not on cable)	17	16		

Source: Goldfarb - The Goldfarb Report 1992

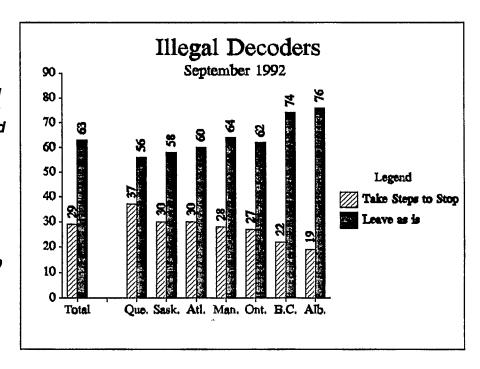
Of those Canadians with Cable TV, the majority do not watch any Pay TV channels. First Choice and Arts & Entertainment seem to be the most popular channels overall.

VCR ownership grew to 78% in 1992, up only slightly from 1991. Indeed, close to one In five (17%) Canadian households own more than one VCR. VCR's are primarily used to play rented movies. On average, VCR owners spend 2.5 hours per week playing back rented movies. They spend slightly less time, on average, per week (2 hours) recording and playing back television recordings.

4.3 <u>Illegal Decoders</u>

According to Environics, it is estimated that the vast majority of Canadians who own satellite dishes are using illegal decoders to receive the full range of television channels. Last June 1991, federal legislation was passed outlawing the manufacture, sale and use of illegal decoders.

When asked if action should be taken against users of illegal decoders, 63% of Canadians Interviewed said they did not think the government should take steps to stop the lilegal use of decoders, but should leave the situation as It is now. 29% would like to see the government take action and 8% have no opinion.



Source: Environics Focus Canada - September 1992

4.4 Newspapers

Newspapers are generally considered to be the second most influential medium next to television. Newspapers place second, behind television, as the medium which:

- * is society's conscience:
- * is most factual:
- * is the one whose advertising you respond to most;
- * is most honest in its reporting;
- * is most important for Canada's writers/performers:
- * contributes most to Canadian unity, and the Canadian identity.

Newspapers are becoming more of society's conscience, at the expense of television. However, newspapers also stand out as the medium which is most critical and negative. Trend data also suggests that people are less likely now than they were a decade ago to be reluctant to give up their newspaper.

Newspaper readership continued its gradual decline in 1992. Two in three Canadians (66%) read a newspaper daily. Of daily readers, four out of five read one newspaper per day and one in five read two or more newspapers per day. During the week, Canadians prefer to read their newspaper either early in the morning or in the evening between 6:00 and 9:00. The proportion reading a morning paper seems to be increasing, while evening reading seems to be declining. On weekends, 9:00 a.m. to noon is the

preferred time to read the newspaper. Readership during this time has been increasing steadily over the past ten years.

4.5 Radio

Radio is considered the third most important and influential medium behind television and newspapers. That is, *radio is selected third behind television and newspapers as the medium which:*

- * is most important;
- * is most honest in its reporting;
- * is one you would be most reluctant to lose for a year, or even a week;
- * contributes most to Canadian unity, and the Canadian identity;

4.6 Magazines

Magazines are considered the least important medium relative to television, radio and newspapers. The areas in which magazines are perceived to be most influential or play their biggest role relative to television, radio and newspapers, are in:

- * being most important for Canada's writers/performers;
- * contributing to the Canadian identity.

In addition, trend data suggests that magazines are perceived as slightly more critical/negative today compared to a decade ago.

The magazine publishing industry experienced a soft year in 1992 with readership down slightly for most publications. French magazines likewise have experienced a difficult year. Readership for most magazines has either remained the same or declined in 1992.

4.7 The Twenty-Something Group Watches Comedies

The 1992 Goldfarb Report offered a special section on the "Twenty-something group" viewing habits. The results of their study revealed that, as a whole, the Twenty-Something age group does not watch any more or less television than anyone else. However, they are more likely to watch late night TV, and in particular watch a lot of sitcoms. They are not likely to watch news or public affairs programs, and not even as likely to watch a lot of the dramas that are on this year. They watch sports programming and game shows with about the same frequency as others.

Like everyone else, the Twenty-Something age group prefers music on the radio. However, they prefer music almost exclusively, as they are less likely to listen for the news or talk shows. Their music preferences tend towards rock and pop, but they also enjoy rock oldies,

rhythm and blues, and hard rock. They are more likely than others to listen to rap and hard rock, but less likely than others to enjoy country music, classical or folk music.

The Twenty-Something group are not as likely as others to read a newspaper, nor do they read it thoroughly when they do pick one up. When they go to a newspaper, it is largely for the classified ads, entertainment and sports. This age group has a tendency to read someone's else's copy, and prefers a morning paper.

	% OF ADULT CANADIANS		
WHICH MEDIUM	1991	1992	
Contributes most to Canada's Identity Television Newspapers Radio Magazine	46 23 14 13	45 26 12 13	
Contributes most to Canadian unity Television Newspapers Radio Magazine	51 23 12 9	46 29 11 9	
Is most powerful In terms of Influencing people's attitudes or way of life Television Newspapers Radio Magazine	85 7 4 1	81 9 4 3	
Had the most influential advertising Television Newspapers Radio Magazines	74 14 3 6	70 16 3 7	
Is the most sensational Television Newspapers Radio Magazines	72 14 4 6	*65 18 5 9	
Is society's conscience Television Newspapers Radio Magazines	46 33 8 8	45 35 7 7	
Is most important to you Television Newspapers Radio Magazines	61 19 17 2	55 23 18 2	

Is most important for Canada's writers/performers Television Newspapers Radio Magazines	48 23 7 19	46 25 5 20
is the one whose advertising you respond to most Television Newspapers Radio Magazines	50 32 7 6	49 32 7 7
Is the one you would be most reluctant to lose for a year Television Newspapers Radio Magazines	53 18 16 9	51 18 16 12
Is most honest in its reporting Television Newspapers Radio Magazines	45 27 16 8	49 24 17 8
Is most factual Television Newspapers Radio Magazines	40 32 13 9	44 31 12 9
Is the one you would be most reluctant to lose for a week Television Newspapers Radio Magazines	50 19 19 7	50 18 19 9
Is most critical/negative Television Newspapers Radio Magazines	28 45 9 12	25 46 11 12

Source: Goldfarb - The Goldfarb Report 1992