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# Evaluation of federal participation in TV5

## *Final Report*

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Department of Canadian Heritage

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## Summary

### Evaluation objectives

The objectives of this evaluation are:

- to provide the federal government with information about the results of its participation in TV5;
- to allow the federal government to use this information to improve program management and cost-effectiveness; and
- to meet central agency requirements for program renewal.

### Methodology

During this evaluation, we reviewed the relevant documentation, conducted in-depth interviews with program managers and key stakeholders, held discussion groups with Canadian TV5 viewers and consulted a media expert. We also analyzed the results of a telephone survey conducted by the Bureau of Broadcasting Measurement (BBM) from a sample of 500 Canadian TV5 viewers.

This study was conducted in early 2001 (January to May) and reflects the situation at that time.

### Evaluation questions and conclusions

Evaluation questions	Conclusions
<b>Relevance</b>	
Is Canada's participation in TV5 still relevant in the context of the Francophone audiovisual space, as it stands and as it is predicted in the short term?	<p>Although TV5 is no longer the only channel broadcasting international programming in French since the advent of new channels such as RDI, TV5 is still relevant in the television market and its future is not threatened in the short or medium term.</p> <p>Broadcasting TV5 in Canada still meets a need. Over 77% of survey respondents indicated that they would be personally affected if this channel ceased to exist.</p>



Evaluation questions	Conclusions
<p>Is Canada's participation in TV5 still an effective means of achieving the desired results?</p>	<p>Canada's participation in TV5 is an effective way for the Government of Canada to actively promote cultural diversity on the international scene, in cooperation with other partners. This participation also addresses the Department of Canadian Heritage's strategic objective of connecting Canadians with the world.</p> <p>Over 87% of survey participants believed that the channel fosters a better understanding of the other countries in the Francophonie and of current international events.</p> <p>The general public is nevertheless not aware of Canadian funding for TV5; only 30% of survey respondents were aware of a link between TV5 and the federal government.</p>
<p><b>Project implementation</b></p>	
<p>What are the advantages and disadvantages, for Canada, of the two-tier management model (Satellimages and the Consortium de télévision Quebec- Canada-CTQC)?</p>	<p>Study participants indicated that the two-tier management structure offers the following benefits for Canada: it creates a certain balance amongst the partners, affords some independence with regard to programming and contributes to the creation of about sixty jobs in Canada. On the other hand, the decision-making structure, which includes several boards (cooperative council, three executive boards for the Americas) and numerous committees is cumbersome and creates tensions among the partners. It does not always foster timely strategic decision-making.</p> <p>As a result, some stakeholders would like the decision-making structure to be more flexible which would, in their view, facilitate management of the channel. If the decision-making process were centralized, the federal government should make sure Canada is represented in the new structure.</p>
<p>What are the advantages and disadvantages, for Canada, of the current distribution of funding among the partners? Does this distribution allow us to maximize our investments? (Are we getting value for our money? Could we do better?)</p>	<p>The study concludes that the current budget formula is advantageous for Canada which, by making a modest investment, is affiliated with one of the three largest channels in the world, broadcast in more than 150 countries.</p> <p>Participants in the study do not regard the funding formula, under which France provides a majority of funding (6/9), as problematic. Moreover, there is no desire at present on the part of the European partners to alter the established budget formula.</p> <p>Some stakeholders were in favour of a greater financial contribution to the CTQC by the federal government in order to expand the channel's activities (such as expansion of Internet activities, development of other funding sources etc.).</p>



Evaluation questions	Conclusions
<p>Are there other sources of funding for this project? Might funding from the Government of Canada eventually be no longer required?</p>	<p>Participants in the study suggested various means to help fund the channel, including:</p> <ul style="list-style-type: none"> <li>• sale of cultural products (books, records etc.) through the Internet site;</li> <li>• broadcast advertising (receiving significant support), as long as it is consistent with the channel's image;</li> <li>• sale of the professional services of the Consortium de télévision Québec-Canada (CTQC) and sharing of its telecommunications channels;</li> <li>• obtaining sponsorships and funding campaigns.</li> </ul> <p>It was agreed however that pursuing these options would require initial investments.</p> <p>On the whole, participants doubted that TV5 could forego public funding without changing its schedule and image.</p>
<b>Impacts and effects</b>	
<p>In what way and to what extent does Canada's participation in TV5 have an impact on:</p> <ul style="list-style-type: none"> <li>• the Canadian French-language audiovisual production industry <ul style="list-style-type: none"> <li>▸ additional sources of income for artists and producers, and increased supply of better-quality French-language Canadian products</li> <li>▸ access for producers and artists to a broader and varied audience throughout the world</li> </ul> </li> </ul>	<p>The annual investment of five million dollars from the Consortium de télévision Québec-Canada for the production and acquisition of Canadian productions is not negligible for Canadian producers. The producers nevertheless do not regard TV5 as a truly effective showcase to stimulate the export of their productions abroad, and as a result, consider the spinoffs to be limited.</p> <p>The majority of study participants believe however that TV5 provides good visibility for Canadian artists abroad, especially for performing artists. They believe that Canadian music videos and variety programs are popular, particularly in Europe.</p>



Evaluation questions	Conclusions
<ul style="list-style-type: none"> <li>▶ job creation</li> </ul>	<p>TV5 contributes to the creation of about sixty jobs in Canada directly within the CTQC.</p>
<p>In what way and to what extent does Canada's participation in TV5 have an impact on:</p> <ul style="list-style-type: none"> <li>• the Canadian clientele, from the following points of view:</li> <li>▶ TV5 audience ratings in Canada (reflect Canadians' interest in this French-language channel with an international flavour)</li> </ul>	<p>The TV5 audience share, 1.5% of Francophone television viewers in Quebec, is comparable to that of other specialized channels such as "Canal D", which has a 1.8% audience share.</p> <p>Given the federal government's investment in the channel (10.3 million dollars in 2001-2002), TV5's ratings are acceptable. By comparison, the CBC enjoys a 23.2% audience share in exchange for a federal contribution in the order of \$750 million.</p>
<ul style="list-style-type: none"> <li>▶ the satisfaction of the Canadian public regarding the programming on TV5</li> </ul>	<p>Nearly 80% of survey participants said they were satisfied with the channel. TV5 provides "added value" to the media in Canada. The channel shows quality French-language programs and broadens viewers' horizons through its international programming. In addition, it helps portray the wealth and vitality of the Francophonie in Canada and around the world.</p> <p>Survey participants under 35 years of age were generally satisfied with the channel, but felt that it would be more appealing with a more varied program schedule. The lack of programming for young people was also cited by several participants in group discussions.</p> <p>Interest in the channel increases with age, ranging from 60.8% for those under 34 years to 81.8% among respondents over 55 years of age.</p>
<ul style="list-style-type: none"> <li>▶ Canada's influence abroad, through Canadian programming and promotion of Canada's cultural diversity</li> </ul>	<p>Study participants agreed almost unanimously that TV5 contributes to showcasing Canada abroad. This channel is an excellent way of presenting the Canadian point of view to the world on major issues. The channel is now seen as a real calling card for Canada. It also allows Canadians living abroad to maintain regular contact with their country.</p> <p>Two thirds of survey respondents believe that TV5 helps Canada assert a leadership role at the heart of the Francophonie.</p>
<p>How successful is the cooperation between Canada and Quebec on this initiative? How could it be improved?</p>	<p>Everyone agreed that dealings between the Quebec and Canadian governments are exemplary in this regard and that cooperation between the two partners is excellent.</p>

Evaluation questions	Conclusions
<b>Alternatives</b>	
<p>Are there any more effective and efficient ways of achieving the objectives?</p> <p>Are there any other models that could be adopted?</p>	<p>The program managers and some key stakeholders consulted during this evaluation are open to the possibility of one-tier management for TV5, as long as Canada participates in this decision-making structure and that government directives are clear.</p> <p>Some key stakeholders suggest that a comprehensive export strategy be developed for Canadian audiovisual products. The expert consulted during this study believes that the cultural gap between Canada and French-speaking Europe accounts for the difficulty of exporting Canadian television products. He does not at this time see how a comprehensive export strategy could offset this difficulty. The consultant who directed the study did not share that opinion however and believes that some well-targeted products could be exported.</p>

### Recommendations

- 1) If decision-making is centralized for TV5, the federal government should make sure that Canada is represented in the new structure in order to protect its interests.
- 2) Evaluate the cost-effectiveness of participant suggestions regarding potential additional sources of funding, including broadcast advertising.
- 3) Since TV5 apparently does not meet the expectations of some stakeholders, especially producers, as regards to the export of audiovisual products, the Department should review this matter and establish an approach that would generate more spin-off benefits for these producers.
- 4) Since the majority of TV5 viewers are not aware of the federal government's contribution to TV5, the program managers should find of way of conveying this information to Canadians. Not only would this ensure greater transparency, it is also in the federal government's interest for Canadians to be aware of the support it provides for the promotion of Canadian values and cultural diversity.
- 5) The study identified some dissatisfaction among young Canadian television viewers of TV5. Since one of TV5's objectives is to develop the largest audience possible, the Government of Canada, as a funding party for the channel, should encourage greater diversity of target audiences.

## 1.0 Introduction

This report presents the results of the evaluation, whose objectives are:

- to provide the federal government with information about the results of its participation in TV5;
- to allow the federal government to use this information to improve program management and cost-effectiveness; and
- to meet central agency requirements for program renewal.

The evaluation also aims to review the relevance of Canada's participation in TV5, and to determine whether there are more cost-effective solutions that might achieve comparable results.

The report is divided into four parts. The first presents the background of the study. In the second part, the research questions and methodology are described. The third part presents the results of the study, and the conclusions and recommendations are given in the last part.

This study was produced in early 2001 (January to May), and reflects the situation as it existed at that time.

### 1.1 Background

The Canadian audiovisual environment has experienced major upheavals in recent years. Technology, markets and the regulatory context, in particular, are changing at a very rapid pace.

- After several years of technological stability, the last few years have seen the emergence of new technologies, including personalized satellite broadcasting and digital technologies applied to the audiovisual field, which offer virtually unlimited broadcasting possibilities. We are moving gradually from traditional single-medium television towards a truly interactive television, integrated to other media sources including the Internet.
- Canadians have been watching less television since 1995, while the Internet assumes a larger and larger place in their lives. In 1999, 42% of households had at least one regular Internet user, compared to 36% in 1998.<sup>1</sup> This advance seems to be made at the expense of television, since in 1999 Canadians watched an average of 21.6 hours of television per week, compared to 22.3 hours in 1998. According to Statistics Canada, there has been a steady decline in television viewing since 1995.

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<sup>1</sup> *Television Viewing*, Statistics Canada, 2001.



- The new technologies have favoured a veritable globalization of markets, which has pushed back audiovisual frontiers and brought on a vigorous international competition, notably from the United States.

Technological, economic and regulatory conditions have had important repercussions on the audiovisual space. Although viewers are generally being offered more and more audiovisual services,<sup>2</sup> a real concentration of ownership is also occurring in the industry, as the following examples demonstrate:

- The emergence of CanWest Global, which owns not only a powerful national network of television stations, but also a daily newspaper in most of its television markets, since acquiring the Hollinger chain of newspapers.
- The acquisition of CTV Inc. by BCE Inc., which controls a number of subsidiaries in the broadcasting field and many telecommunications businesses.
- The acquisition of Vidéotron Ltée and its subsidiary, Groupe TVA Inc., by Québecor (which owns Télévision Quatre-Saisons) and the *Caisse de dépôt*.<sup>3</sup>

At the same time, we have witnessed a consolidation of the independent production sector, where a number of major players have gone public.<sup>4</sup> These changes are so rapid, and so recent, that it is still too early to say what the long-term consequences will be. Many observers believe that the intensification of worldwide competition, especially from the United States, has become a real threat to the French-language audiovisual industry. Others<sup>5</sup> have a different view, and point out that the new digital technologies offer great opportunities and will provide access to a larger number of French-language channels, in particular for Francophones in minority situations in Canada, many of whom can only access a very limited number of French-language channels via cable. Still others see the globalization of markets as an exceptional opportunity for expanding the markets of the French-language cultural industry.

Of course technological change and globalization do not only affect Canada. The internationalization of audiovisual markets presents a real challenge for the Francophone community worldwide.

### Responsibility for TV5

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<sup>2</sup> In this document, the masculine is used indiscriminately, for the sole purpose of readability.

<sup>3</sup> Brief of the CBC in response to a call for comments on the future of the Canadian Television Fund, September 15, 2000.

<sup>4</sup> *Ibid.*

<sup>5</sup> *Ensuring Pride of Place for Canadian Programming* (Response to the Canadian Radio-television and Telecommunications Council concerning Order in Council C.P. 2000-511 and Public Notice CRTC 2000-38), the Canadian Broadcasters Association.



Within the federal government, TV5 is a responsibility of the Department of Canadian Heritage, which handles these matters through the International Affairs Branch, Strategic Policy Division. Five strategic objectives have been adopted to guide the Department's policies and actions. TV5 is part of the vision "Canadians in relation to the world", which seeks to promote the values and interests of Canadians in the world and to offer Canadians access to the best that the world has to offer.

### **Creation of TV5**

TV5 Europe was launched in 1984 by the Europeans with the original aim to broadcast by satellite French-language programming in Europe and the Mediterranean basin. The first partners were two European services, *Radio-Télévision de la Communauté française de la Belgique* (RTBF) and *Télévision Suisse Romande* (TSR). In January 1986, Canada, represented by the *Consortium de télévision Québec-Canada* [Quebec-Canada Television Consortium] (CTQC), became a partner of TV5 Europe, enriching its programming with Canadian French-language programs.

In September 1988, following discussions at the Summit of La Francophonie in Quebec City in 1987, the TV5 Canada-Québec signal was launched in Canada. The channel TVFQ99 thus gave way to TV5 after nine on Quebec cable. On November 30, 1987, the Canadian Radio-television and Telecommunications Council (CRTC) granted CTQC its first operating licence (CRTC Decision 87-895).

Today, six satellites broadcast TV5 internationally. TV5 is present in Asia, the Orient, Europe, Africa and America, including the Caribbean. Its range is considerable, allowing it to reach nearly 130 million households. Using this wide broadcasting capability, TV5 seeks to increase the influence of French-language television and to promote the broadcasting of programs produced in French at the international level. More specifically, TV5's objectives are:

- To develop the broadest possible audience by offering high-quality French-language programs, to win the loyalty of this audience, to conquer new audiences, and to promote the broadcasting of high-quality programs, produced in French, at the international level.
- To reflect Francophone cultural diversity by showcasing the worldwide Francophone community, promoting cultural diversity, fostering exchanges of programs between Francophone countries, as well as, exporting French-language programs internationally.
- To be a place of cooperation between partner channels, establishing ties between the French-language channels, making sure to take on board their programming while fostering the expression of Francophone audiovisual and cinematographic creativity.

### **Structure of TV5**



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At the time this study was done,<sup>6</sup> TV5 was managed by two operators: CTQC in Montreal, responsible for broadcasting signals for TV5 Québec-Canada, TV5 USA and TV5 Amérique latine et Caraïbes (ALCI) signals; and Satellimages in Paris, responsible for broadcasting signals for TV5 Europe, TV5 France-Belgique-Suisse, TV5 Asie, TV5 Afrique and TV5 Orient.

CTQC is a non-profit organization. Its board of directors comprises public and private French-language broadcasters, two representatives of the Government of Canada, two representatives of the Government of Quebec and the chairperson of the board of directors, appointed on the recommendation of the two governments. The member broadcasters of CTQC (Société Radio-Canada/Canadian Broadcasting Corporation (SRC/CBC), TVA, Télévision Quatre-Saisons (TQS), Cogeco, Télé-Québec and TFO) make available, on a voluntary basis, programs for broadcasting across all the territories covered by TV5, that is to say, in more than 150 countries. The board of directors of the *Satellimages-TV5* corporation comprises representatives from the European channels and from some organizations in the French audiovisual community, and one representative from CTQC.

The two operators are legally responsible for editorial content and have the final say over programming. A management contract has been concluded, which includes guidelines delineating the operators' activities and binding them to the funding organizations.

A Cooperation Council oversees the two operators and ensures a consistent global vision for the TV5 signals broadcast. The Council consists of the CEOs of the two operators and representatives of RTBF (Belgium), SSR (Switzerland), France 2, France 3, ARTE-La Cinquième and two partner channels of CTQC, Société Radio-Canada and TéléQuébec. The mission of the Council is:

- To collate the mutual demands and expectations of the partner broadcasters regarding the programming of schedules.
- To be a place for concerted thinking and reflection on the balance among the various objectives of gaining an audience, channel recognition, and helping to export French-language programs.

A Cooperation Council for TV5 Afrique was also set up in 1993 for the services covering Africa.

The Conference of Ministers, of which the Minister of Canadian Heritage is a member, sets the general directions for TV5. The Conference of Ministers also has the following responsibilities: to establish guidelines for the organizations responsible for implementing TV5; to set the level of financial contributions from funder governments; to define priorities for geographic expansion; and to rule on the entry of new governments. Decisions within the Conference are made by consensus. However, France has more weight in the decision-making process because its financial contribution covers two thirds of the costs of TV5.

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<sup>6</sup> Management of TV5 is undergoing a full restructuring, a process that was initiated at the annual conference of ministers responsible for TV5 on October 27, 2000.



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### **Funding of TV5**

While TV5 does have some direct revenues (for example, revenues from cable subscriptions), the international service is essentially funded out of public monies. The overall financial contribution of the five funding governments breaks down as follows: 6/9 France, 1/9 CTQC (60% Canada, 40% Quebec), 1/9 French Community of Belgium and 1/9 Switzerland. This contribution is, however, structured differently according to various criteria, depending on the territory of broadcast. For 2001-2002, the Government of Canada's anticipated financial participation in TV5 is \$10.3 million.

In Canada, CTQC generates subscription revenues. As the conditions of its broadcasting licence from the CRTC require, part of these revenues is directly reinvested in the acquisition and production of Canadian content.

### **Programming**

TV5's programming is intended to be generalist and multilateral, bringing together programs from its partner broadcasters. Schedules vary from one territory to another. TV5's schedule in Canada, for example, is very different from the schedules in the other territories. In each schedule, the share allocated to each partner country is more or less dependent on the size of the country's financial participation in the territory in question. For Canada-Québec, its presence in the schedule is defined as follows:

Figure 1.1

Canadian shares of TV5 funding and programming

Territory	Canada-Québec share of public funding	Share of programming schedule (average)
TV5 Europe	1/9	14%
TV5 Afrique	1/9	13%
TV5 Asie	1/9	12%
TV5 Orient	nil *	12%
TV5 USA	30%	28%
TV5 ALCI	35%	28%
TV5 Québec-Canada	50% of common costs and 50% of structure costs	15%  (CRTC requirement)
Average for Canadian programming:		17%

\* TV5 Orient is funded exclusively by France.

**Objectives of Canadian participation**

The objectives of Canada's participation in TV5 are:

- To contribute to our efforts on the international scene to promote cultural diversity and to assert a leadership role at the heart of the international Francophone community.
- To contribute to the spread of Canada's influence abroad.
- To support the objectives of Canada's foreign policy, and more particularly those associated with the dissemination of culture (which has been adopted as the third pillar of Canada's foreign policy).
- To offer Canadian producers and artists a showcase for their products outside the country.
- To allow Canadian producers and artists to access a broader and more diversified audience throughout the world, and to offer them a source of additional income through the rights that are paid for the international broadcasting of their productions.
- To provide Canadians with an additional French-language channel that offers images of various countries of the worldwide Francophone community, thus enabling them to broaden their horizons.

## 2.0 Methodology

### 2.1 Evaluation questions

The evaluation seeks to answer the following evaluation questions:

#### 1. Relevance

Is Canada's participation in TV5 still relevant in the context of the Francophone audiovisual space, as it stands and as it is predicted in the short term? (New channels, digital technology, etc.).

Is Canada's participation in TV5 still an efficient means of achieving the desired results?

#### 2. Impact and effects

In what way, and to what extent, does Canada's participation in TV5 have an impact on:

- The Canadian French-language audiovisual production industry, from the viewpoints of:
  - ▶ providing an additional source of income for artists and producers;
  - ▶ increasing the supply of better-quality French-language Canadian products;
  - ▶ giving producers and artists access to a broader, varied audience throughout the world (ratings of Canadian programs abroad, changes over the years, etc.);
  - ▶ job creation.
- The Canadian clientele, from the viewpoints of:
  - ▶ ratings of TV5 in Canada (reflecting the interest of Canadians in this French-language channel with an international flavour);
  - ▶ satisfaction of the Canadian public regarding the programming on TV5;
  - ▶ spreading Canada's influence abroad through Canadian programming;
  - ▶ promoting Canadian cultural diversity.

Are there other effects and impacts, whether intentional or not, that result from Canada's participation in TV5?

#### 3. Implementing the project

What are the advantages and disadvantages, for Canada, of the two-tier management model (Satellimages and CTQC)?

What are the advantages and disadvantages, for Canada, of the current distribution of funding among the partners? Does this distribution allow us to maximize our investments? (Are we getting value for our money? Could we do better?)

Are there other sources of funding for this project? Is it possible that the funding provided by the Canadian Government would eventually not be necessary?

To what extent is the Canada-Quebec collaboration in this initiative a success? How could it be reinforced?

#### **4 . Alternatives**

Are CTQC's administration and use of funds to attain TV5's objectives as efficient as they could possibly be? Are there other more effective and efficient ways of achieving these objectives?

Are there other models that could be adopted?

## **2.2 Data gathering methods**

To carry out this evaluation, we used a methodology that relies on several sources of information: administrative documents, TV5 performance measures, interviews with managers and key players, consultations with a media expert, discussions with TV5 viewers, and an analysis of data gathered from a sample of TV5 viewers. The following paragraphs present these information sources and the research methods employed.

### **Review and analysis of departmental documents**

The administrative files and TV5 performance measures were a basic source of information. They allowed GGI to describe TV5 and the federal participation in TV5.

### **Interviews**

In-depth interviews were conducted with the following respondents (the figures in parentheses indicate the number of persons consulted):

- Managers in the International Affairs Branch and in the cultural development division, who are or were responsible for the TV5 initiative at the Department of Canadian Heritage in recent years (n=4).
- A representative of the CRTC (n=1).
- Managers at the Quebec-Canada television consortium (n=2).
- A representative of the French-language television service of Radio-Canada (n=1).

- Representatives of associations of directors and producers (n=3).
- A professional working in the media sector (n=1).
- An observer from outside the country (from the Canadian Embassy in France) (n=1).

The interviews held in the Ottawa-Hull region and the interview with the CTQC representative were conducted directly in person. The other interviews were conducted over the telephone. The interview guide is given in Appendix A.

### **Expert**

Given the nature of the issues and the complexity of the evaluation, a professor at Laval University joined the evaluation team. He gave his opinion on the following:

- The overall approach of the evaluation.
- The guides and research instruments.
- The results of the research.
- The conclusions and recommendations.

### **Focus groups with viewers**

Four meetings were held with viewers, using the focus group method. These meetings, which all lasted two hours, were held in Montreal (two groups), Caraquet (one group) and Toronto (one group). The facilitator's guide is given in Appendix A.

### **Analysis of the data from a survey by the Bureau of Broadcasting Measurement (BBM)**

From March 14 to 20, 2001 the polling firm BBM conducted a telephone survey of 500 Canadian viewers of TV5. To participate in the survey, respondents had to

- be 18 years of age or older, and
- have watched at least one program on TV5 in the last month.

Since the data from this survey was relevant to the TV5 evaluation, it was obtained and analyzed, in order to arrive at certain observations for this evaluation.

The overall response rate to the telephone survey (see Appendix B) was 48.2%. Excluding inadmissible persons, the response rate was 75.8%, which is entirely acceptable for this type of survey.

The questionnaire that was used for this survey is given in Appendix A.





Figure 2.1

## Composition of the sample

	%	n
Sex:		
Male	44	220
Female	56	280
Region:		
Canada outside Quebec	10	50
Quebec	90	450
Origin:		
Canadian	88.6	443
Other	11.4	57
Age :		
less than 35 years	7	35
35-54 years	34.5	172
55 years or older	57.1	285
Education:		
Secondary or less	45.2	224
Community college	20.2	100
University	34.5	171
Income:		
Less than \$30,000	35.9	158
\$30,000 to \$49,000	30.4	134
\$50,000 or more	33.6	148

**Description of the sample**

Figure 2.1 describes the sample obtained in the survey. Given the size of the sample (n=500), the margin of error is 4.5%, 19 times out of 20. According to the results, TV5 viewers include a relatively high proportion of Quebec residents (90%), women (56%) and persons 55 years of age or older(57.1%). The

characteristics of the viewers—age in particular—are, as we will see, reflected in the results of the study. These results are presented in the next section.

Regarding education and income, the results indicate that 45% of respondents had a secondary school diploma or less. One third of respondents had an income of less than \$30,000, a little less than a third had an income between \$30,000 and \$49,000, and the other third had an annual income of \$50,000 or more.

## 3.0 Results

This section describes the detailed results of the evaluation. We will first consider the relevance of the channel and of the federal government's participation in it. Then we will present the results concerning the impact and the implementation of the federal participation. Finally, we will present suggestions and alternatives proposed by the persons who were interviewed in the course of this evaluation.

### 3.1 Relevance of the channel and of federal participation in that channel

The first theme considered in this evaluation was relevance. The evaluation sought to determine to what extent Canada's participation in TV5 is relevant in the context of the Francophone audiovisual space, as it stands now and as it is predicted in the short term, and to what extent Canada's participation in TV5 remains an efficient means of achieving the desired results.

#### 3.1.1 Relevance of TV5

##### *Results of the in-depth interviews*

Most of the people interviewed think that TV5 still occupies a relevant place in the Canadian television space. Some mentioned that TV5 was the second largest French-language channel broadcast at the national level, after Radio-Canada. One of the respondents mentioned that "if bilingualism is a defining factor of the country, TV5 is an essential component." Over the last few years, other channels (e.g., RDI, TVA) have entered the market of Canada-wide French-language channels. In spite of the arrival of new channels, however, most participants in this study believe that TV5 still occupies a relevant place on the television chessboard.

According to the respondents in the federal government, this relevant place is attributable, in particular, to the channel's international content. One of the respondents maintained that TV5 offers an original international perspective, different from that of the large American channels, such as CNN. TV5 presents a French, Canadian, Belgian and Swiss perspective; none of the new channels fulfils TV5's role. Others mentioned that the channel distinguishes itself due to the quality of its programs, particularly its cultural ones. Only an arts channel would be able to compete with TV5 in this market segment.

One of the respondents from CTQC mentioned that although its ratings are low (1.5% of the Francophone Quebec market during prime time), TV5 enjoys a clientele that is stable, and to a certain extent, loyal. TV5 also has an established relationship and a choice place with cable operators, who are happy to offer it to all their subscribers. On the other hand, one of the external stakeholders expressed the view that the channel has become less relevant than it was when created. While TV5 has been an important step, it must now deal with competition from new channels such as RDI—which broadcasts European content—and RFO (St-Pierre and Miquelon, by cable and satellite). Other respondents also said that in the long term, TV5 would be facing other competing channels, in particular through the



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advent of new technological segments, including satellite and digital. People do not think, however, that the future of TV5 is threatened in the short or even medium term.

As for the relevance of TV5 on the international scene, some of the persons interviewed said that TV5 plays a major role. One of the representatives of the federal government pointed out that the French is not very widely spoken around the world, at least in comparison with English, and that we therefore need an international Francophone channel to promote the French language. Another respondent mentioned that TV5 offers the possibility of supplying French-language productions to the rest of the world. However, one person interviewed maintained that while we in Canada take a considerable interest in European programs, there is much less interest in Canadian programs on the other side of the Atlantic.

### ***Results of the survey***

In the telephone survey, we asked respondents whether they agreed with the statement that TV5 is an essential service like Radio-Canada, Télé-Québec (in Quebec) or TFO (in Ontario).



Figure 3.1

Percentage agreeing with the statement “TV5 is an essential service, like Radio-Canada, Télé-Québec and TFO”

	Percentage agreeing
<b>Age</b>	
-34	61.9%
35-54	76.7%
55+	78.4%
<b>Sex</b>	
Male	77.2%
Female	76.4%
<b>Province of residence</b>	
Quebec	76.7%
Rest of Canada	77.5%
<b>Country of origin</b>	
Canada	75.2%
Other	89.1%
<b>Total</b>	<b>76.8%</b>

Source: BBM survey, 2001.

n=500

Figure 3.1 presents the answers to this question. Three quarters of the respondents agree with the statement. That is hardly surprising, given the fact that only TV5 viewers were invited to take part in the survey. However, what is interesting is the distribution among age groups and countries of origin. The results show that more older people (78.4% agree, compared to 61.9% among those under 34) and nationals of foreign countries (89.1% said they agreed with the statement, versus 75.2% among native Canadians<sup>7</sup>) tend to recognize the essential nature of TV5.

<sup>7</sup> The other descriptive variables, namely educational level and income, generally have little influence on the variables we are examining. Consequently, the results according to these variables are not presented for all the results in this part.

### 3.1.2 Relevance of the federal participation in TV5

#### *Results of the in-depth interviews*

As indicated in the following paragraphs, most of the respondents think that the federal participation in TV5 is relevant, given the channel's schedule, its influence and the mandate of the Department of Canadian Heritage, which helps promote the Canadian official languages, identity and culture.

One of the external participants referred to the origins of TV5, which more or less replaced the channel TVFQ, the latter being broadcast only in Quebec and New Brunswick. The federal participation led to a national broadcasting service, which is entirely consistent with the federal government's mission to promote the French language everywhere in the country. As one federal representative noted, TV5 has a mandate to represent all of Canada, not just Quebec.

Other respondents argued that TV5 has the character of a public channel, in other words, that it broadcasts programs with a high cultural content, without any advertising spots. Only government participation can ensure the operation of such a channel. One of the respondents stressed that in a time of concentration of ownership of channels, the federal participation is helping to diversify ownership of the media.

Furthermore, a number of respondents mentioned the relevance of the federal participation given the role of TV5 in broadcasting French-language content throughout the world. According to a federal representative, if the Canadian Government values the international Francophone community and wishes to be associated with it as a serious partner, it must contribute to TV5. Another respondent noted that *La Francophonie* is not homogeneous, and that the federal government must make sure that TV5 reflects the cultural diversity within that international Francophone community. As he put it: "Canadian culture is not like French culture." TV5 must also show the diversity that exists within Canada's own Francophone community.

Again in reference to the international scene, several respondents underlined the importance of broadcasting Canadian points of view on important international issues. It is in the federal's government's interest, in their view, to support an international channel that broadcasts Canadian news programs. On its own, Canada could not afford to fund an international French-language channel over a network serving such a vast area as that of TV5. Moreover, by broadcasting Canadian news outside the country, TV5 offers a source of information that is useful to the diplomatic corps and to other Canadians abroad.

We mentioned to participants the possibility that the federal government's participation in the funding of TV5 might eventually be withdrawn. Most of the respondents questioned on this point did not think that such action could be contemplated, at least in the medium term. Two respondents believe that the channel will never be self-sufficient, at least with its present of programming. In their view, self-

sufficiency means privatization, whether real or virtual, which would lead to a reduction of the channel's geographic reach.

### ***Results of the focus groups: highlights***

The participants in the focus groups were asked about the role of the federal government. The following is a summary of their comments:

- In **Caraquet**, few people were aware of the federal government's participation in TV5. They also said that the federal government must see to it that all regions of Canada's Francophone community are reflected in TV5's programming. For them, the channel is relevant because it has no substitute. It is the only channel that broadcasts European French-language programs.
- In **Toronto**, the majority of participants were unfamiliar with the federal government's precise role. Nonetheless, half of them said that apart from the CRTC, the federal government should not play a direct role in TV5. Most respondents said that they would miss TV5 if it were to disappear.
- Few participants in **Montreal** were aware of a relationship between the federal government and TV5; however, some knew that there was a relationship between TV5 and the Government of Quebec. The majority of respondents agreed nonetheless that the federal government should provide financial support for the channel given the nature of its mission. Most said that they would miss TV5 if it were to disappear since it is unique. It provides news programs and European documentaries that would not otherwise be accessible, and its loss would mean one less French-language channel.

### ***Results of the survey***

- The results of the survey confirm the results of the focus groups on the question of the relationship between the federal government and TV5. Only 30% of respondents thought that there was a relationship between TV5 and the federal government, while 37% thought that there was none. Thirty-three per cent did not know or did not reply.
- As for the federal contributions, 58% of respondents said they agreed with the idea of financial support provided by the federal government.

## **3.2 Implementation**

At the time this evaluation was carried-out, TV5 was characterized by multiple decision-making and advisory bodies. There were two operators (CTQC and Satellimages), two cooperation councils and four boards of directors, not to mention meetings of senior public servants and the annual conference of ministers.

### **Efficiency of the decision-making structure**

#### ***Results of the in-depth interviews***

The points of view on the efficiency of this structure were rather divergent. Five persons noted positive aspects. According to two external respondents, this structure has the advantage of maintaining a certain equilibrium between the partners in Europe and America. In their words, “Each complements the other.” One person mentioned that the idea of setting up CTQC gave Canada a certain control over the channel in North America. Any other structure that reduced the Canadian influence would not be desirable. One of the respondents of CTQC argued that up to this point, the structure has given Canadians some independence in programming. This is not the case in Belgium, for example, where the same programming is presented as in France. This Canadian autonomy has helped create some sixty direct jobs at CTQC. As for the cooperation councils, one of the respondents noted that they maintain ties among partners and should be maintained.

Six respondents expressed some reservations about the existing operational structure. Most of them felt that the dual structure and the different councils represented a considerable load, which it would be best to lighten. The growth in the number of decision-making authorities complicates the decision-making process and gives rise to some confusion in the distribution of responsibilities, in particular between broadcasters and funders. Moreover, according to a federal representative, since there is already some tension between the European and Canadian partners, the multilateral structure impedes strategic decisions. According to this same respondent, the channel’s cumbersome administrative structure prevents it from reacting to technological challenges and competition in a timely manner (to diversify sources of funding, for example).

Finally, one of the respondents stressed that structural problems have made TV5 a permanent concern for the politicians and for the senior management of the two operators. Regarding the efficiency of the structure, one of the respondents pointed out that increasing the number of decision-making units does not foster decision-making on, for example, the issue of exporting Canadian products.

The persons we interviewed offered many suggestions and alternatives to the current structure. These comments are presented in the last section of this part of the study.

### **Budgetary formula**

According to the current TV5 formula, operating budgets include common costs assumed by the five funding governments, in the following proportions: France 6/9, Belgium 1/9, Switzerland 1/9, and Canada/Quebec 1/9 (Canada 60%/Quebec 40%). The two operators of TV5 also collect cable and advertising revenues. Canada’s planned funding of TV5 in 2001-2002 amounts to \$10.3 million.

The CTQC budget includes contributions by the governments of Canada and Quebec (around \$13 million) and from cable revenues. By the terms of the licence it currently holds with the CRTC, CTQC is required to devote part of its budget to the acquisition and production of Canadian content.

According to one respondent from the Consortium, CTQC’s overall budget is insufficient to meet current challenges. If TV5 wishes to extend its activities on the Internet or to develop new sources of





funding, it will have to make investments. The present budgets do not allow for such large-scale initiatives.

Comments on the budget formula were mostly concerned the value of Canada's contribution overall. Three respondents thought that Canada's minority contribution—in comparison with the majority share assumed by France—was normal given the demographic and financial weight of France, which is reflected in the decision-making process and in the sharing of air time. According to one federal representative, this formula facilitates the participation of four Francophone countries. However, in spite of this funding imbalance, we find that Canada has a considerable presence on the air (Canadian programs account for 15% of the CTQC schedule and 14% of the European schedule<sup>8</sup>).

Three other respondents rather thought that a larger Canadian contribution would be desirable. Two representatives of the federal government argued that the federal participation should be increased if the objectives of the channel were deemed to be relevant. One of them added that a greater Canadian financial weight would lead to more air time for Canadian programs. However, one of the respondents stressed that the Europeans have repeatedly expressed their opposition to a rebalancing of contributions.

#### **Efficiency of TV5 in relation to the federal contribution**

While the federal contribution is giving rise to discussions, several people mentioned that TV5's performance is impressive, given the size of the investment made. Three representatives of the federal government mentioned that TV5 gives Canada good visibility—broadcasting in more than 150 countries—in return for an investment which, when all is said and done, is modest. In their words, “For a small sum, Canada becomes a partner of one of the three most highly developed networks on the planet.” One of the respondents emphasized that Canada's investment is very low compared to the contributions of the other countries. For example, Belgium invests a comparable amount without having the same independence in programming.

#### **Federal-provincial collaboration**

The respondents were unanimous in saying that relations between the governments of Canada and of Quebec are excellent in this area. According to a representative of the federal government, the two governments share the same objectives, and are consulting with each other so that they can speak with one voice. The responsible officials exhibit great transparency, and if disagreements sometimes arise, the parties discuss the matter: “In fact, this is a model for federal-provincial collaboration. Everyone puts in their own contribution.”

An external respondent also stressed the excellent collaboration between senior officials in both levels of government. According to another respondent, the collaboration is “exemplary, surprising, given the

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<sup>8</sup> If we exclude TV5 productions from the calculation, CTQC's share falls to 7% of the European schedule.



delicate subject matter.” The same respondent testified that these good relations have been maintained over the last few years, even during periods when Canada-Quebec relations were more tense.

### 3.3 Impacts of the federal participation

As in any government program, it is expected that the federal participation in TV5 will produce some impacts. In the case of TV5, it is expected that the investments will have an economic impact on French-language audiovisual production, a cultural impact on the Canadian clientele and an international impact, encouraging the spread of Canadian influence abroad. The results of the evaluation of these different impacts are presented below.

#### 3.3.1 Economic impacts

Economic impacts include impacts on Canadian producers and impacts on Canadian artists.

##### Impacts on Canadian producers

###### *Results of in-depth interviews*

In general, most participants in in-depth interviews believe that the impact of TV5 on Canadian producers is, in the final analysis, rather limited.

Three respondents, namely a representative of the Consortium, a representative of the federal government and an external respondent, asserted that there is a tangible impact on producers. The first respondent recalled that TV5 buys many programs from Radio-Canada, Télé-Québec and other channels. For some time, TV5 has also been making purchases directly from the producers, sometime alone, sometimes in partnership with another television or radio channel. The representative of the federal government believes that the five million dollars that CTQC annually invests in production or acquisition of French-language Canadian productions have an impact. According to this respondent, “TV5 gives a second life to Canadian productions.” One of the participants pointed out, while TV5 does not support a large number of productions itself, it does often bring a complement to programs that are coproduced with other channels.

Most respondents (seven out of nine) who expressed an opinion on the subject had reservations about the size of the impacts. According to two representatives of the federal government, the impact is marginal and could be increased. The first of these representatives said that five million dollars a year is not much, after all. However, for this respondent there is an indirect effect: the channel is rather like a showcase for products, and we can expect acquisitions by some other route. The problem is that sales of productions are marginal. TV5 is not really efficient as a showcase, at least in Europe where few people watch TV5, and even fewer watch Canadian programs. As the representative put it: “We hoped that TV5 would showcase our producers, so that the markets would get accustomed to our products. But few people watch TV5 in France.” According to the other federal representative, the problem

resides in part on the production side, in that the Canadian industry has difficulty supplying high-quality programs for the international market.

Four respondents also expressed the opinion that TV5 spinoffs for producers are limited. One of the respondents said that the fees charged under the agreement with the Artists' Union are creating a major financial obstacle. Another mentioned that Canadian programming is broadcast outside prime time in Europe. One of the representatives of the Consortium explained that the French authorities argue that TV5's ratings are higher in France because French programs are broadcast. The respondent from the Consortium admitted that Europeans, and French people in particular, have not yet taken an interest in Canadian productions. In some cases, the programs should be subtitled, but two problems then arise. In the first place, the viewers do not like subtitles. Secondly, according to the agreement with the Artists' Union, subtitling cannot be done without the permission of the actors. This renders the process very difficult, and sometimes impossible.

### **Impacts on Canadian artists and other economic impacts**

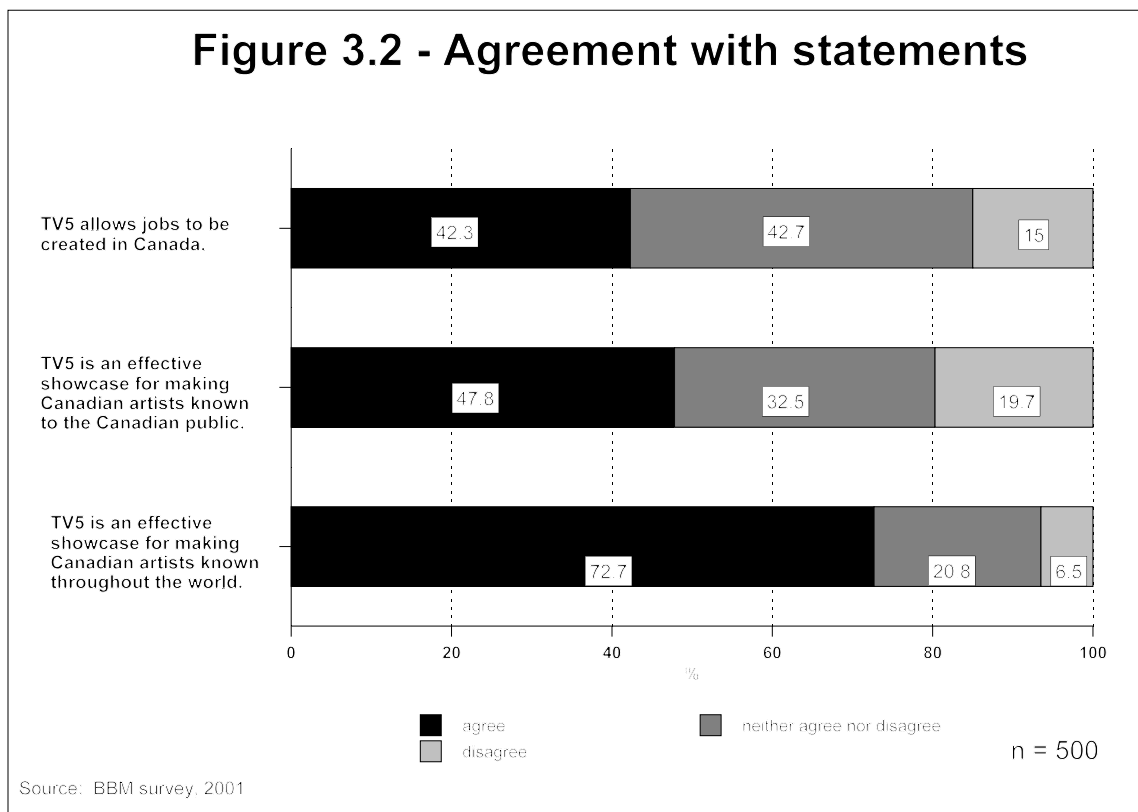
#### ***Results of the in-depth interviews***

At the present time, only 15% of the broadcast schedule in Canada is devoted to Canadian programs. According to the respondents, TV5 is an effective showcase for Canadian artists, in contrast to Canadian producers. Seven respondents spoke about this impact, and were unanimous in saying that the indirect impact was significant.

Three respondents from the federal government maintained that TV5 offers good European visibility to many Canadian performing artists. Musical clips and variety programs help to make people familiar with both established artists and younger ones. One of the respondent also said that TV5 offers visibility to artists in countries where they would not otherwise have any, such as Germany, Asia and Russia. "And it is France that pays most of the costs", he added.

The other participants interviewed for this evaluation spoke along similar lines. One of them said that TV5 is "the third most watched channel in the world, or at least the most accessible." In Africa, for example, there are few channels, so that TV5 has good visibility. Finally, another participant mentioned that TV5 also offers good visibility to Francophone artists within Canada itself, while MusiquePlus, for example, is only broadcast in certain regions. TV5 also offers good visibility to various Canadian festivals, including the Franco-Ontarian Festival and the *Francofolies*.

**Figure 3.2 - Agreement with statements**



***Results of the survey***

The telephone survey sought to determine, in particular, the perception that viewers have of the effects of TV5 on job creation and on Canadian artists. According to the results:

- More than 42% of respondents believe that TV5 creates jobs in Canada. About the same proportion took a neutral position.
- Nearly 73% of respondents also believe that TV5 is an efficient medium for making Canadian artists known abroad. However, less than half (47.8%) think that TV5 is a good showcase to make Canadian artists known here in Canada.

Figure 3.3

**Proportion of respondents who agreed with the impact statements (percentage satisfied<sup>1</sup>)**

	Age			Sex		Total
	-34	35-54	55+	M	F	
TV5 is an effective showcase for making Canadian artists known to the Canadian public.	26.6%	41.1%	54.6%	43.8%	50.9%	47.8%
TV5 is an effective showcase for making Canadian artists known throughout the world.	60.1%	70.8%	76.2%	71.6%	73.6%	72.7%
TV5 allows jobs to be created in Canada.	44.4%	39.1%	44.9%	40.4%	43.8%	42.3%

1. Those who answered 4 or 5 on a scale from 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001.

n=500

Figure 3.3 provides additional details on the above-mentioned economic impacts.

According to the results, older viewers are more likely to think that TV5 is an effective showcase for Canadian artists. Surprisingly, only 26.6% of viewers under 35 years of age think that TV5 is an effective showcase for making Canadian artists known to the Canadian public (compared to an average of 47.8%).

On the other hand, women are more inclined to think that TV5 is an effective showcase for making Canadian artists known to the Canadian public (50.9%, compared to 43.8% of men).

Figure 3.4

**Proportion of respondents who agreed with the impact statements (percentage satisfied<sup>1</sup>)**

	Province		Country of origin		Total
	Quebec	Rest of Canada	Canada	Other	
TV5 is an effective showcase for making Canadian artists known to the Canadian public.	48.4%	42.1%	49.1%	37.7%	47.8%
TV5 is an effective showcase for making Canadian artists known throughout the world.	74.3%	58.6%	73.4%	67.3%	72.7%
TV5 allows jobs to be created in Canada.	42.0%	45.5%	42.9%	37.3%	42.3%

1. Those who answered 4 or 5 on a scale of 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001.

n=500

Figure 3.4 gives an overview of the responses by province of residence and country of origin. As indicated by the figures, residents of Quebec are more likely to think that TV5 is an effective showcase for making Canadian artists known to the Canadian public (48.4% versus 42.1% in the rest of the country). Yet more importantly, many more viewers in Quebec believe that TV5 is an effective showcase for making Canadian artists known throughout the world (74.3% compared to 58.6%).

Regarding the origin of viewers, more viewers of Canadian origin said that TV5 is an effective showcase for making Canadian artists known both in Canada (49.1% compared to 37.7% of residents of non-Canadian origin) and throughout the world (73.4% compared to 67.3%).

On the subject of job creation, native Canadians are slightly more inclined to believe that TV5 allows jobs to be created in Canada (42.9% vs. 37.3% of nationals of foreign countries).

### 3.3.2 Cultural impacts

#### *Results of the in-depth interviews*

The impact on the Canadian clientele, in other words, Canadian television viewers, was also estimated through the respondents to the in-depth interviews. Overall, the great majority agree that TV5 offers Canadians French-language programming that is rich in content, and that the channel has worthwhile added value in the Canadian media space.



Canadian  
Heritage

Patrimoine  
canadien

Canada

According to one of the respondents, Canada has access to all the wealth of European television: “TV5 nourishes us, opens us up to the world.” This richness is appreciated not only by Francophones, but also by Francophiles and by those who are learning the French language.

For one of the participants, TV5 has the right “packaging” to accommodate sharing of programs and reporting with an international dimension. TV5 is a consistent whole, and the public has understood this. Another respondent said that TV5 allows Canadians to see what is going on elsewhere, and another added that TV5 allows a brewing of ideas. There are social debates on the channel. Of course, some programs may seem to be a bit out of context, but they do offer another point of view. Another respondent indicated that there is a real interest in this rather different channel, which was demonstrated when Rogers, the cable operator, tried to change the place of TV5 on the network. That provoked a strong reaction from viewers.

The representatives of the federal government made similar comments. One of the respondents said that the size of TV5's audience is perhaps not comparable to that of the major French-language channels in Canada, but it is entirely respectable in the specialty channels' market. According to another respondent, television viewers have access to high quality language and a good diversity of information and points of view. He also pointed out that TV5 is one of the rare sources of information on Africa and African realities. Yet another respondent mentioned that although it does not have a major influence, TV5 shows that there are other ways to make television. It also makes information available that would never be seen on other channels. In this sense, TV5 can have a considerable impact on certain clienteles. Another federal representative said that TV5 helps to show non-Francophone Canadians the vitality of the international Francophone community: “They need to be shown that there are Romanians and Vietnamese who speak French. They need to be shown that people learn French for other reasons than wanting to please Quebecers.” Finally, as noted above, one of the respondents recalled that TV5 is also a source of information for Canadians abroad, enabling them to follow events that are happening in Canada.

The respondents from the Consortium also testified to this impact on the Canadian population. For one of them, TV5 has an international flavour that broadens the viewers' horizons: “It opens a window onto another television experience.” Viewers also see that they are taking part in something larger than Quebec. In the Francophone areas outside Quebec, there is a need for a channel that is less “local” than the private Quebec channels whose contents have a strong Montreal bias.

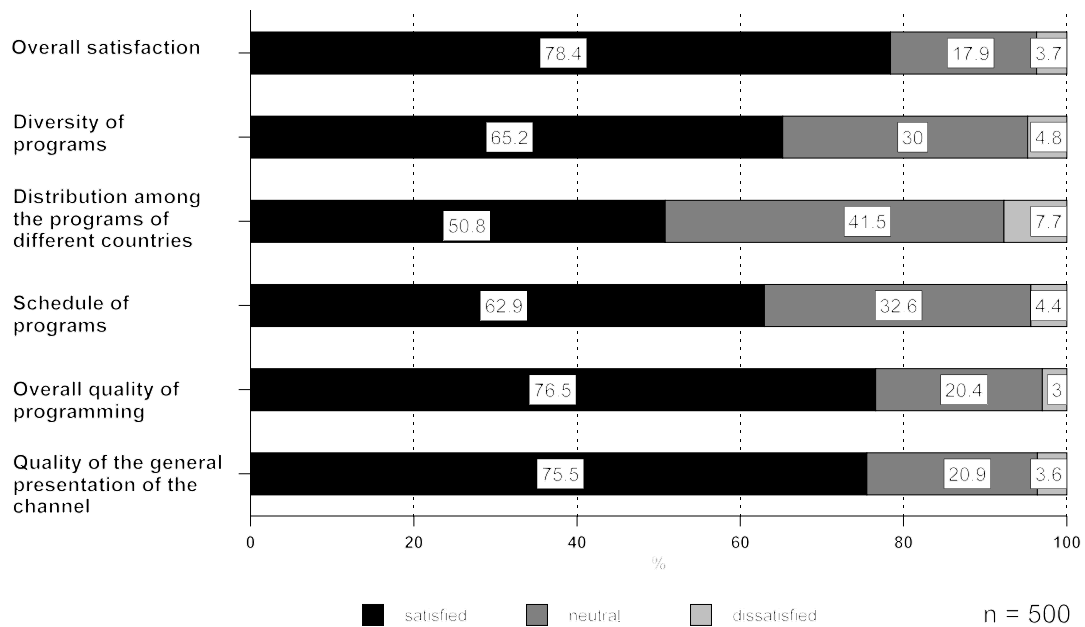
*Results of the survey***Viewer satisfaction indicators**

To measure the extent of the effects of TV5 on the Canadian population, we also examined the satisfaction of viewers. This was measured through the survey conducted by BBM, whose results we analyzed. These results are presented in the following paragraphs (other indicators of the survey will follow).





Figure 3.5 - Satisfaction with TV5



Source: BBM survey, 2001

As regards the channel in general, the results indicated in Figure 3.5 reveal the following facts:

- A very large majority of respondents (78.4%) are satisfied with TV5. Only 3.7% are dissatisfied.
- Among the different aspects of satisfaction towards the channel in general, distribution among the programs of the different Francophone countries (Canada, France, Belgium, Switzerland, Africa) received the lowest satisfaction rate, namely 50.8% of respondents.
- All other aspects of satisfaction (diversity, schedule, overall quality, quality of presentation) received satisfaction rates of over 60%.

**Figure 3.6**  
**Satisfaction with TV5 (percentage satisfied<sup>1</sup>)**

	Age			Sex		Total
	-34	35-54	55+	M	F	
Satisfaction with TV5	81.7%	76.7%	78.8%	78.7%	78.2%	78.4%
Diversity of programs	61.2%	63.4%	66.5%	63.5%	66.6%	65.2%
Distribution among the programs of different countries	23.0%	50.8%	53.6%	51.2%	50.4%	50.8%
Schedule of programs	56.7%	56.2%	67.3%	62.6%	63.2%	62.9%
Overall quality of programming	75.6%	76.1%	76.7%	79.0%	74.6%	76.5%
Quality of the general presentation of the channel	74.2%	72.0%	77.5%	79.2%	72.6%	75.5%

1. Those who answered 4 or 5 on a scale of 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001.

n=500

Figures 3.6 and 3.7 give details on the satisfaction of viewers by age, sex, region and country of origin. The results of Figure 3.6 show that there are considerable variations according to age. Regarding overall satisfaction, only three percentage points separate the youngest from the oldest. On the other hand, older respondents tend to be more satisfied with all the measured aspects, and in particular with the diversity of programming, distribution among programs from different countries, and the schedule of programs. One remarkable fact is that only 23% of young people are satisfied with the distribution of programs from different countries (compared to an overall average of 50.8%). We shall return to this question at the end of this part of the study.

According to the same table, the differences between the sexes are less marked. The only noteworthy difference occurs in the perception of the overall quality of programs and of the general presentation of the channel, with which men are generally more satisfied than women.

**Figure 3.7**

**Satisfaction with TV5 (percentage satisfied<sup>1</sup>)**

	Province		Country of origin		Total
	Quebec	Rest or Canada	Canada	Other	
Satisfaction with TV5	78.9%	74.3%	76.6%	93.0%	78.4%
Diversity of programs	64.6%	70.9%	64.7%	69.8%	65.2%
Distribution among the programs of different countries	49.7%	60.0%	48.8%	65.3%	50.8%
Schedule of programs	63.1%	61.2%	61.9%	70.7%	62.9%
Overall quality of programming	76.3%	79.1%	75.8%	82.0%	76.5%
Quality of the general presentation of the channel	75.7%	73.9%	74.3%	85.1%	75.5%

1. Those who answered 4 or 5 on a scale of 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001.

n=500

Figure 3.7 gives rates of satisfaction by province and country of origin. As indicated, although respondents from Quebec are more satisfied with TV5 in general, viewers in the rest of Canada are more satisfied with the diversity of programs, distribution among the programs of different countries and the overall quality of programming.

We also note differences between viewers of Canadian origin and those from other countries. According to the results, viewers of non-Canadian origins are clearly more satisfied with TV5 (93% compared to 76.6%). This higher satisfaction is, moreover, expressed for all other indicators.

**Figure 3.8 - Agreement with impact statements**

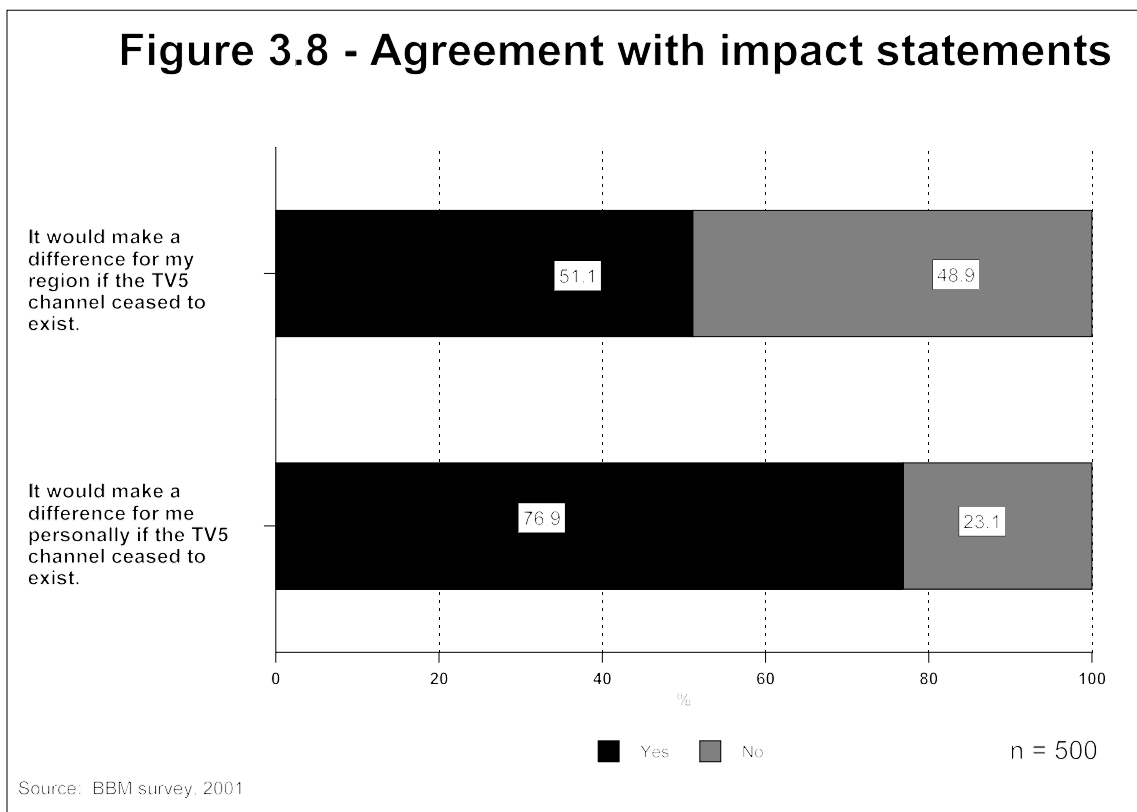


Figure 3.8 of this series gives an indication of TV5's added value for people and their regions.

- To the question “If the TV5 channel ceased to exist, would that make a difference for you personally?”, more than three quarters of the respondents (76.9%) answered in the affirmative.
- To the question “If the TV5 channel ceased to exist, would that make a difference for your region?”, a little over half the respondents (51.1%) answered in the affirmative.

**Figure 3.9**

**Proportion of respondents who agreed with the impact statements(percentage satisfied<sup>1</sup>)**

	Age			Sex		Total
	-34	35-54	55+	M	F	
It would make a difference for my region if the TV5 channel ceased to exist.	27.1%	41.4%	62.5%	47.5%	54.2%	51.1%
It would make a difference for me personally if the TV5 channel ceased to exist.	60.8%	71.5%	81.8%	78.8%	75.8%	76.9%

1. Those who answered 4 or 5 on a scale of 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001

n=500

Figure 3.9 provides additional details on the perceptions of TV5's added value in regional and personal terms. As the table shows, we again have differences between age groups: only 27.1% of young people believe that the absence of TV5 would make a difference in their region, compared to 62.5% of those 55 years of age and older. On a personal level, young people are also less inclined to think that the absence of TV5 would make a difference to them personally (60.8%, compared to 71.5% and 81.8% among those in the 35-54 and over 55 and over age brackets respectively).

The differences are less marked between men and women. Men are, however, less likely to think that the absence of TV5 would make a difference in their region(47.5% compared to 54.2% among women).

**Figure 3.10**

**Proportion of respondents who agreed with the impact statements (percentage satisfied)<sup>1)</sup>**

	Province		Country of origin		Total
	Quebec	Rest of Canada	Canada	Other	
It would make a difference for my region if the TV5 channel ceased to exist.	49.8%	60.3%	48.7%	68.5%	51.1%
It would make a difference for me personally if the TV5 channel ceased to exist.	77.3%	73.2%	74.5%	94.9%	76.9%

1. Those who answered 4 or 5 on a scale of 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001

n=500

Finally, Figure 3.10 gives the distribution of answers by region and by country of origin. According to the results, viewers in Quebec are proportionally much less numerous than viewers in the rest of Canada to think that the disappearance of TV5 would make a difference for their region (49.8%, compared to 60.3%).

Regarding the country of origin of the viewer, we again see significant differences. According to the two measures, viewers of non-Canadian origin are more inclined to recognize the value added of TV5. In this group, 68.5% of viewers said that it would make a difference for their region if the channel ceased to exist, compared to 48.7% of native Canadians.

*Results of focus groups: highlights*

Those who took part in the focus groups provided the following comments:

- In **Caraquet**, the participants clearly associated TV5 with educational television of superior quality. Most participants said they were satisfied with the channel. However, a majority of them deplored the slight amount of information on Acadia and the abundance of European news and information. It was also noted that certain types of programs were lacking, particularly programs for young people.
- In **Toronto**, TV5 was associated with France and Europe. According to the participants, TV5 is a high-quality channel that offers a different perspective on events. The major weaknesses identified primarily concerned the lack of diversity in the programs presented.
- In **Montreal**, TV5 is regarded as a European channel that makes contact with Francophone countries. It is a link for La Francophonie, it “makes you travel”. People are generally satisfied with the channel, which offered unusual programs. The major weaknesses that were mentioned concerned the lack of variety. People have the impression that there are many repetitions.

### 3.3.3 International impact

#### *Results of the in-depth interviews*

One of the objectives of the evaluation is to determine to what extent TV5 has an impact on Canada's influence abroad. On this issue, all respondents except one said that the channel was an effective window for making Canada known throughout the world.

Two representatives of the federal government mentioned that TV5 was an excellent vehicle for showing the rest of the world the Canadian viewpoint on the great questions of the day. For one of the representatives, "There was a gap before TV5." According to another respondent, TV5 broadcasts Canadian news, to which are added French, Swiss and Belgian news. The channel also makes it possible to show other countries what Canada is able to accomplish in the field of television.

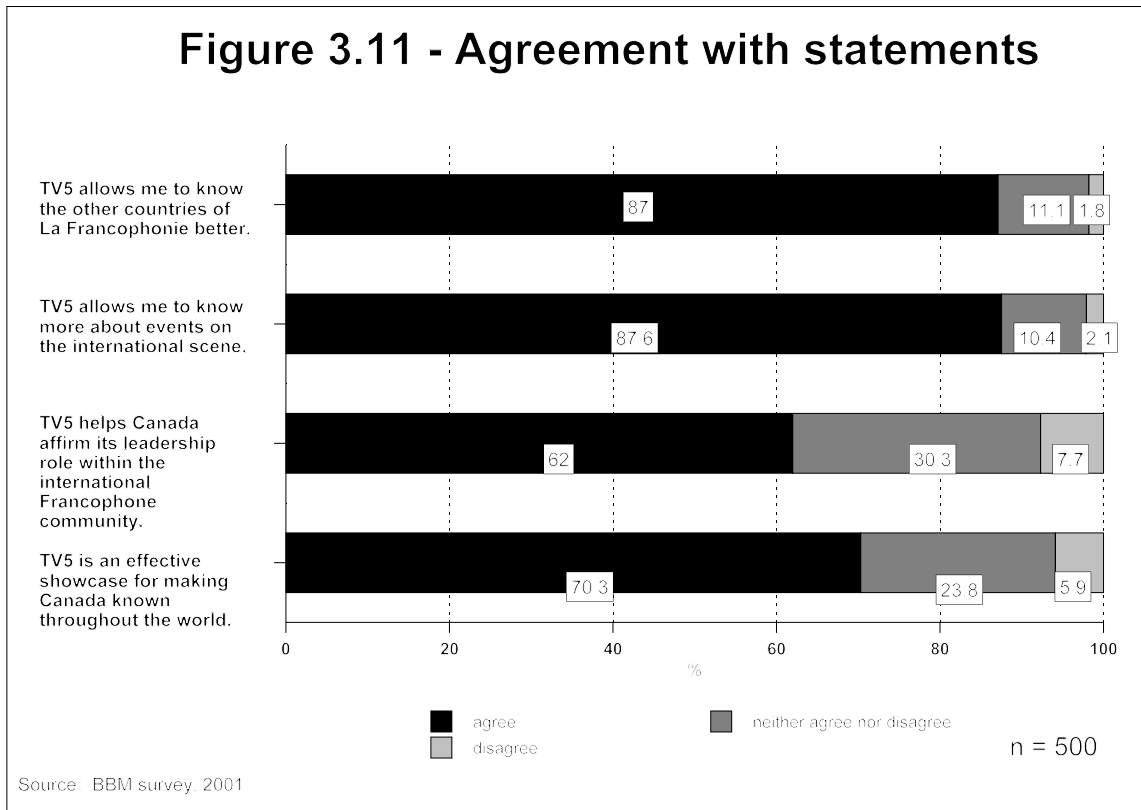
Generally speaking, the participants from the media sector had similar opinions on this question. According to one of the respondents, TV5 "gives another voice, another set than Hollywood's." For him, TV5 has become an instrument for building alliances against the American hegemony. "It's a network whose influence is incredible", according to another respondent, for whom TV5 has an "terrific impact". For him, the channel has become a veritable calling card for Canada. One observer from abroad testified that Canadian news has high visibility in Europe. He explained that in the rest of the worldwide Francophone community, Canada is seen as a counterweight to France. The problem is that in his opinion, TV5 does not show the best Canadian programs.

Only one of the respondents expressed reservations on the subject. According to him, TV5 does not really have an impact on the international level. He thought that the federal government was hoping that the channel would allow an exchange between Canada and the other countries of the Francophone world, by giving Canadians access to programs from other countries, and vice versa. For this respondent, TV5's impact in this respect is rather limited.





Figure 3.11 - Agreement with statements



**Results of the survey**

Figure 3.11 presents the overall results of the survey concerning TV5's impact on Canada's influence abroad. According to the results of the survey:

- A very large majority of respondents agree that the channel makes it possible to become more familiar with the other countries of La Francophonie (87%) and with events on the international scene (87.6%).
- Nearly two thirds of respondents (62%) likewise think that TV5 helps Canada to affirm a leadership role within La Francophonie.
- A majority of viewers (70.3%) think that TV5 is an effective showcase for making Canada known abroad.

Figure 3.12

**Proportion of respondents agreeing with the impact statements (percentage satisfied<sup>1</sup>)**

	Age			Sex		Total
	-34	35-54	55+	M	F	
TV5 allows me to know the other countries of La Francophonie better.	81.8%	86.2%	87.9%	90.9%	84.0%	87.0%
TV5 allows me to become more familiar with events on the international scene.	82.4%	88.4%	87.8%	91.8%	84.3%	87.6%
TV5 helps Canada affirm a leadership role within the international Francophone community.	47.9%	55.8%	67.8%	63.5%	60.8%	62.0%
TV5 is an effective showcase for making Canada known throughout the world.	63.9%	72.0%	70.5%	70.2%	70.4%	70.3%

1. Those who answered 4 or 5 on a scale of 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001.

n=500

Figures 3.12 and 3.13 offer more details on perceived impacts, according to various demographic variables. Separating the responses into three age groups, we see that older people are, as a general rule, more inclined to believe that TV5 helps Canada affirm a leadership role within the international Francophone community. People who are over 35 years of age are also more inclined to believe that the channel is an effective showcase for making Canada known throughout the world.

The analysis by sex shows that men are more likely to think that TV5 allows them to become more familiar with La Francophonie and with events on the international scene (approximately 91% of men compared to 84% of women, in both cases).

**Figure 3.13**
**Proportion of respondents agreeing with the impact statements (percentage satisfied<sup>1</sup>)**

	Province		Country of origin		Total
	Quebec	Rest of Canada	Canada	Other	
TV5 allows me to know the other countries of La Francophonie better.	87.0%	87.1%	87.0%	87.4%	87.0%
TV5 allows me to become more familiar with events on the international scene.	87.1%	91.5%	86.5%	96.4%	87.6%
TV5 helps Canada affirm a leadership role within the international Francophone community.	61.3%	68.8%	61.5%	65.7%	62.0%
TV5 is an effective showcase for making Canada known throughout the world.	71.3%	61.2%	70.6%	68.3%	70.3%

1. Those who answered 4 or 5 on a scale of 1 to 5, from very dissatisfied (1) to very satisfied (5).

Source: BBM survey, 2001.

n=500

Figure 3.13 presents the responses to the same statements, by province and country of origin. Some differences can be observed between the respondents from Canada and those from abroad. Nationals of foreign countries are more likely to believe that TV5 allows them to become more familiar with events on the international scene (96.4%, compared to 86.5% of Canadians).

Moreover, viewers of non-Canadian origin are more inclined to believe that TV5 helps Canada affirm a leadership role within the international Francophone community (65.7% compared to 61.5% for native-born Canadians).

Curiously, more residents of Quebec than of other provinces say that TV5 is an effective showcase for making Canada known in the world (71.3% versus 61.2%), while a proportionally larger number of residents of other provinces than of Quebec think that TV5 helps Canada affirm a leadership role within the international Francophone community (68.8% vs. 61.3%).

*Viewing statistics*

Finally, we can also assess the impact of TV5 by using the channel's audience data.

**Figure 3.14: Daily cumulative audience (1999-2000)**

Country	Audience share	Sources
France	2.8%(1)	Audicâble
Francophone Belgium	17.0%(1)	CIM
French-speaking Switzerland	13.0%(1)	IHA
Francophone Quebec	1.5% (2)	Nielsen

(1) Cumulative audience of persons who have watched TV5 at least once during the reference period (age 15 or older).

(2) Share of weekly market, in hours of prime time viewing (2 years and older, Francophone Quebec).

Figure 3.14 indicates the audience shares in Europe in comparison with TV5's share in Francophone Quebec. According to the data, the audience share of the adult population is low in France (2.8%) and in Francophone Quebec (1.5%), compared to Francophone Belgium (17%) and French-speaking Switzerland (13%).

**Figure 3.15: Daily cumulative audience<sup>1</sup> (Francophone Quebec, 2000)**

Channel	Audience share
TV5	1.5%
SRC/CBC	23.2%
Canal D	1.8%

(1) Share of the weekly market in prime time hours (2 years and older, Francophone Quebec).

Source: Nielsen.

Figure 3.15 compares the ratings of TV5, Société Radio-Canada and Canal D (specialty channel). In comparison with TV5, Société Radio-Canada obtains a rating of 23.2%, while Canal D has 1.8%. Given the investment of the federal government in the TV5 channel (\$10.3 million in 2001-2002), TV5's rating may be deemed acceptable. In comparison, Société Radio-Canada obtains a rating of 23.2% for a federal contribution in the order of \$750 million.

**Figure 3.16: Francophone Belgian audience share  
of a selection of Canadian programs on TV5 (2000)**

<b>Program</b>	<b>Audience share (15 years and over)</b>
Découverte	3.2%
Zone X	2.1%
Branché	2.8%
Claire Lamarche	1.7%
Le Point	1.3%
d.	2.2%
Fictions canadiennes	1.5%

Source: TV5 Europe

Figure 3.16 gives an indication of the range of Canadian programs broadcast on TV5 Europe. It reflects the audience share, in Belgium, of a selection of Canadian programs (the audience shares for France and Switzerland were not available). As shown, the audience share varies between 1.5 and 3.2%, a performance we could qualify as acceptable for a so-called specialty channel.

### **3.4 Suggestions and alternatives**

The persons interviewed in this evaluation were invited to propose or identify suggestions and alternatives to the existing TV5 formula. Sections 3.4.1 and 3.4.2 present some suggestions for improving the channel. The alternatives are presented in Section 3.4.3.

#### **3.4.1 Suggestions for making the channel more efficient**

Many suggestions were made for improving the management of the channel and its performance generally.

##### **Management of TV5**

A number of respondents mentioned the possibility of grouping the two operators together in a single head office in Europe. Most representatives of the federal government were not opposed to this option, provided that certain mechanisms were put in place to protect Canadian interests. Two challenges were mentioned, which would arise if a common head office were established:



- Europeans and Canadians have different measures of performance and methods of management. An effort will have to be made to harmonize them to facilitate the pooling of the work.
- Part of our Canadian culture is to respect minority partners. In France, the majority dominates and decides. We would have to find means to ensure the respect of minority interests.

Finally, one of the respondents argued that the existing Consortium should maintain control over programs broadcast within Canadian territory. Many respondents indeed stressed the importance of preserving Canadian ownership—and a minimum of Canadian content—so as not to lose what has been achieved. Another respondent also defended the Consortium, while suggesting that governments withdraw from management (i.e., boards of directors). Rather, he foresees governments giving a clear mandate to a simple structure, for example by asking Radio-Canada to represent Canada and Télé-Québec to represent Quebec.

#### **Other suggestions**

- The Québec-Canada Television Consortium could work closely with our European partners to carry out marketing operations (market studies, launch of new products, etc.).
- The Canadian embassies could be mobilized to help organize marketing operations outside Canada, in collaboration with European partners.
- The new technologies have led to more and more talk of “bouquet” services. TV5 could be divided into two channels: TV5 News and TV5 Variety. In Europe, technological changes are happening very quickly. TV5 will have to adapt. On the other hand, technologies are developing less rapidly in Africa and in Latin America. Consequently, there should be a differentiated adaptation process for the different zones.
- Digital technology poses new challenges for TV5, which could become a true search engine, an atlas of La Francophonie comprising several services that would be added to the traditional television services.
- The Consortium could partner with local stakeholders to promote local events outside Montreal. Artists could be helped by promoting their tours and selling tickets on line, or indicating where books can be purchased following a relevant program.
- The Consortium could have two structures, one focusing on exports, the other on programming in the country. Exporting requires specialized skills.
- To create jobs, local production would have to be increased. According to one respondent, the best approach would be to do this in partnership with other channels. It is more profitable for artists and producers to broadcast in this fashion, since TV5 is broadcast without rights in other countries.

- According to one of the respondents, TV5 is a conservative channel: “It’s a bit bland (...) It’s reheated TV.” Since there is no advertising, this is not too serious, in his opinion. However, the channel could be more innovative and have a more industrial structure, in other words, be more oriented towards production.
- TV5 could do more to promote tourism and Canadian industry, and to discuss major national issues.
- More use could be made of Anglophone producers, or of producers whose origin is neither Francophone or Anglophone.
- The channel would expand its audience by using subtitles and by showing programs produced in other languages that might interest Francophones (e.g., perceptions of French culture in other countries).
- Europe and Africa should be given a priority to increase Canadian content. According to one of the respondents, France should accept this because in Europe, TV5 only serves up “reheated” fare from TF1, FR2 and FR3. The American and Latin American markets should not be prioritized.

### 3.4.2 Potential sources of funding

#### *Interviews in depth*

Respondents were also asked to identify and discuss other possible sources of funding for the channel.

As mentioned above, some respondents suggested that TV5's Web site be used to sell cultural products (books, records, etc.) used or mentioned in the channel's programs. This service would be useful in regions where those products are not easily accessible. Another respondent from the Consortium mentioned that the CTQC might sell some internal services, such as Spanish, English and Portuguese subtitling. CTQC could contract out these services. The Consortium could also offer telecommunications services. It seems that the TV5 contents travel over fibre optic cable, which is not being used to full capacity.

Of course, most respondents mentioned advertising as a source of funding. At the present time, there are only sponsorships on the North American continent, while there is advertising in Europe. Most respondents were not in principle opposed to the idea of advertising on TV5. Some conditions, however, should apply:

- One of the respondents said that he did not object to the introduction of advertising, provided that the quality of the programs was not touched, that the channel not yield to pressure from advertisers. The advertising formula would have to be compatible with the channel's objectives.
- Another respondent said that a code of ethics would be necessary if it was agreed that there would be advertising on the channel. The existing image of the channel must be preserved.



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- According to a representative of the Consortium, the introduction of advertising would require a marketing organization, which would involve an investment of several million dollars that TV5 does not have. A certain critical mass of advertising would also be necessary to make the whole process profitable.

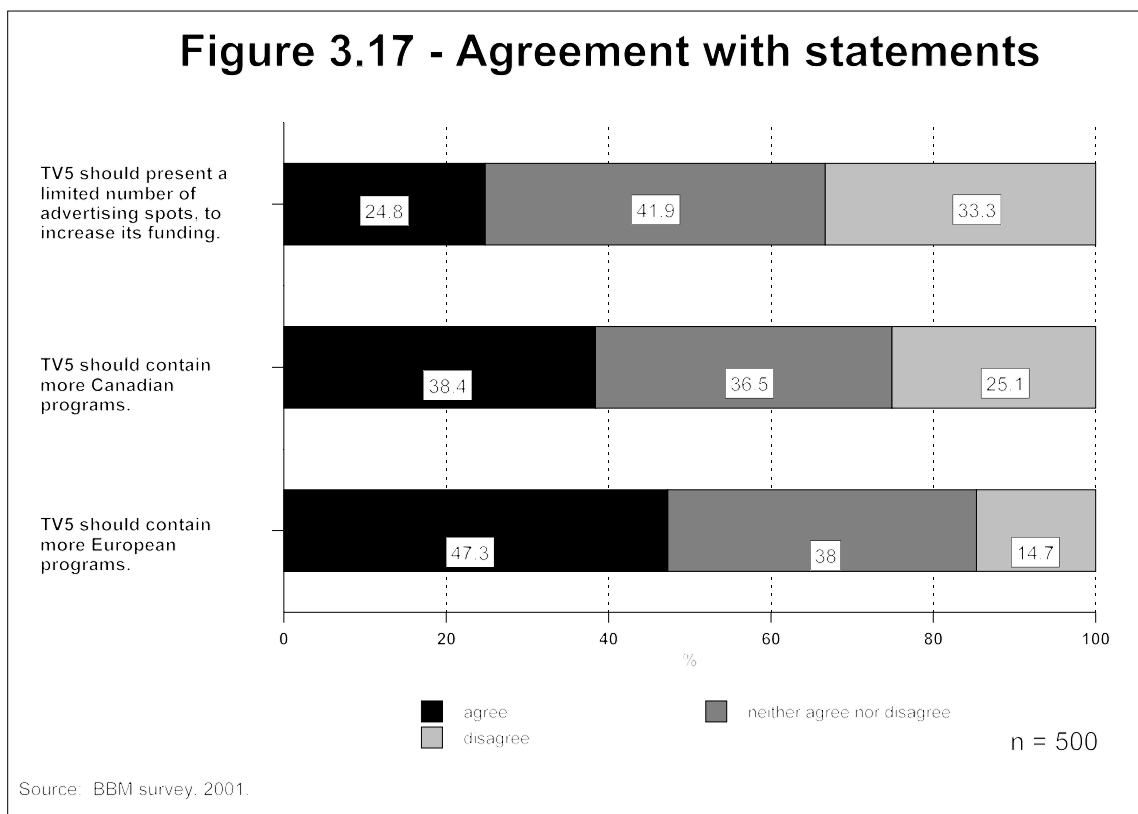
Some respondents argued that this proposal would not be well regarded by the other channels. Apparently, the advertising market is not very large. On the other hands, one of the respondents said that advertising could be envisaged in other territories.

### *Survey results*

Viewers were asked to say to what extent they agreed or disagreed with a certain number of statements and suggestions, including the idea of presenting advertising on TV5. The results are given in Figure 3.17.



Figure 3.17 - Agreement with statements



- As indicated, the opinions of viewers on the subject of advertising on the air are very divided. About a quarter of respondents said they agreed with having a limited number of advertising spots presented on the channel, while more than a third said they disagreed. More than 40% did not take a position either way on this issue. However, the results show that *the majority of viewers would not have any major objections to TV5 putting a limited number of advertisements on the air.*
- Opinions were also divided regarding the proportion of Canadian programs. More than 38% of respondents agreed that TV5 should present more Canadian content, while 25% thought the opposite.
- On the other hand, on the subject of European content, nearly half of the respondents (47.3%) would prefer to see more of it.

Figure 3.18

**Proportion of respondents agreeing with suggestion statements**

	Age			Sex		Total
	-34	35-54	55+	M	F	
TV5 should present a limited number of advertising spots to increase its financing.	21.3%	31.9%	21.0%	26.7%	23.2%	24.8%
TV5 should contain more Canadian programs.	27.4%	39.2%	39.5%	35.9%	40.3%	38.4%
TV5 should contain more European programs.	37.0%	47.7%	48.8%	49.7%	45.4%	47.3%

Source: BBM survey, 2001.

n=500

Figure 3.18 gives some additional indications concerning the persons who responded to the three statements. According to the results:

- Middle-aged adults more readily accept the idea of presenting advertising spots on the TV5 channel. However, those in favour of it are still in the minority (31.9% agree with the idea).
- On the subject of Canadian content, the results indicate that young people (27.4%) and men (35.9%) have the most difficulty accepting the idea of increasing the proportion of Canadian programs on TV5. Oddly enough, young people are also among those least likely to support the idea of increasing European content.

***Results of the focus groups: highlights***

- According to the participants in **Caraquet**, there could be advertising spots on the TV5 channel provided that they were not translated and were presented before or after the programs.
- In **Toronto**, it was thought that the channel could obtain additional revenue through sponsorships or subscription campaigns. Advertising, including advertising on the Web site, is also a potential source of income. However, half the participants were not happy with the idea of having advertising on the channel. It is believed that this would change the image and unique character of the channel.



- In **Montreal**, several participants said they liked TV5 because it carried no advertising. The majority preferred the status quo, although some said that advertising would be acceptable if it resulted in an improvement of the schedule. If necessary, advertising spots could be presented before or after the programs.

### 3.4.3 Alternatives

#### *In-depth interviews*

A certain number of respondents also proposed strategies external to TV5, which could contribute to the objectives of the federal participation.

#### **Export strategy**

A certain number of respondents put forward the idea of a comprehensive export strategy. This strategy might include one or more of the following parameters:

- According to one of the participants, the federal government could invest more directly in content, to make it more exportable either by TV5 or by other sources.
- Product could be offered, at a loss if necessary, to stimulate interest in France and Belgium. According to one of the respondents, better sales could be made once interest was aroused.
- According to one of the respondents, little effort has been made by the government to encourage exports. The government could offer producers some logistical and political support.

#### **Make way for private initiatives**

The traditional alternative to a government program is, of course, to leave responsibility to the private sector. Five respondents raised this possibility, however, they thought that no private initiative could play a role equivalent to that of TV5, either internationally or even nationally. One of the respondents believes that one of the national channels in the country could, in the near future, rebroadcast certain foreign programs, but on a reduced scale. Moreover, it is unlikely that such an initiative would result in an exchange, in other words, that Canadian programs would be broadcast abroad (“there might not be a return ticket”). Nevertheless, the arrival of new foreign specialty channels could be envisaged. According to one participant, the CRTC has received licence applications for five French (foreign) channels.

According to most respondents, private initiatives of this kind could not take the place of TV5, especially in the international sphere. Nationally, they would only enrich the networks. However, their arrival on the scene would undoubtedly have strategic consequences for TV5, which will have to adjust to changes in the audiovisual space.



## 4.0 Conclusions and recommendations

The consultant's conclusions are presented in the form of a summary of strengths and weaknesses of the TV5 channel.

### Strengths

- In the *cultural and political* sphere, TV5's contribution to the Canadian media space is significant. TV5 is opening Canada to the Francophone world by offering high-quality European programs that Canadian channels provide only in small quantities, if at all. TV5 is also showing that La Francophonie is not limited to France and French Canada. The Canadian news broadcast around the world also gives the Canadian point of view on international events, and helps to spread Canada's influence.
- On the *economic* level, the channel offers Canadian performing artists an excellent showcase on the international market. The indirect benefits for these artists would be significant.

### Weaknesses

- In the *cultural* sphere, the TV5 channel has difficulty attracting younger viewers and offering a varied schedule of programs.
- *Economically speaking*, the direct and indirect impact on producers is relatively limited, particularly because air times in Europe are apparently not favourable to Canadians. Although revenues are, when all is said and done, reasonable for producers if the amount of the federal investment is taken into account, it seems that more could be done to export Canadian audiovisual products to Europe.
- Although the dual decision-making structure has proved effective in protecting Canadian interests, the many boards and councils at the channel make the decision-making process cumbersome. Restructuring is inevitable. We expect that the federal government will do everything in its power to maintain the Canadian influence on the overall management of the channel.

These conclusions lead us to propose the following recommendations:

### Funding

- According to a number of respondents, it would be possible to put additional sources of funding in place for the channel. We share their view that these measures must not compromise the image or present contents of the channel. At that level, we need to think about the consequences and implications of all the proposed measures. As for the idea of putting advertising on the air, TV5 should learn some lessons from a similar experiment at Télé-Québec, which has adopted a formula that a number of people are proposing for TV5. To pursue these thoughts in greater depth, we

should study the Télé-Québec case to see what the effects have been on programming, and especially how productive the formula has been financially. We could also inquire into other approaches experimented with by other channels, such as TVOntario.

- In all cases, we need to see whether these measures are worth the investment, at least on the national level. If the impact is limited to the national sphere, such measures are likely to be useless, or at least superfluous, if they do not bring in a substantial amount of revenue. According to most respondents, the federal investment is minimal given the channel's performance. However, if these funding measures proved effective, they could allow the channel to put mechanisms of promotion in place and thereby increase its ratings.

### **Decision-making structure**

- There seems to be every indication that France will increase its influence in the management of TV5, at least outside Canada. Since major changes may be predicted in TV5's decision-making structure, it would no doubt be timely to review the channel's overall strategy, both in Canada and abroad. This strategy will have to consider the place that TV5 will occupy in the other media sectors, in particular the Internet and/or digital technology. TV5 will also have to develop diversified strategies to handle regional markets, where technological gaps seem to be widening rather than narrowing. Finally, TV5's strategy will have to provide for increasing cohabitation with other similar channels, for which TV5 must become a valuable complement, or even a strategic partner.
- Of course, if CTQC is maintained, those who run it will have to update its strategic approach. On the local level, for example, measures will have to be put in place to attract younger clients who, according to recent studies, seem to be more interested in our neighbours to the South than in the French culture to which we are attached. If that is true, the gauntlet has been thrown down for all the Francophone media, including TV5.
- It is clear that TV5 is not meeting expectations in the field of exporting, and it seems highly unlikely that it will be any more effective in this area after the current restructuring is completed. The expert consulted in connection with this study is of the opinion, however, that the cultural gulf between Canada and French-speaking Europe makes the exporting of television productions extremely difficult at the present time. He recalls that large Canadian channels have made attempts along these lines in the past, and that the results were rather disappointing. For that reason, he does not see the need to put special strategies in place to support our exports in this field. However, the consultant does not share this opinion. In light of Canada's recent success in the musical field and the genuine interest that Europeans have in Canada, the consultant rather thinks that it is possible to export certain products, provided that they are clearly targeted and certain obstacles outside Canada are removed. Like a number of participants in this study, the consultant is recommending to the Department that it update an export strategy for Canadian television

productions, through TV5 or other channels with a presence in Europe. This strategy will have to support more productions that are international in character. We will have to reflect very seriously on this concept—if someone has not already done so—to define just what a production with international content is. According to the results of this evaluation, international production would include documentaries, and perhaps some variety programs. In all cases, a marketing study of the matter is required. The Department could then initiate a consultation with producers, Canadian channels, experts in the field and provincial partners, to define the possibilities of federal intervention in this area. This intervention—which could of course be incorporated into an existing initiative or organization—should, in particular, revive Canadian exports in this sector by offering logistical, political and financial support to producers.

### **Visibility of the federal government**

- The results of the survey and of the focus groups indicate that generally speaking, viewers are unaware of the fact that the federal government is an important funder of TV5. As in the case for any government program, it is important that citizens be informed of the government's support of TV5, in particular for reasons of transparency and accountability towards taxpayers. It is also in the federal government's interest to ensure that its participation in the channel is very visible, to demonstrate its support for promoting Canadian values and fostering Francophone cultural diversity. Those in charge of the program will therefore have to find a way to communicate this information to Canadians, in collaboration with the other funding providers.



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## Appendix A: Instruments



## Evaluation of the federal participation in TV5

### Interview Guide:

Representatives of the federal government, of the Canadian Radio-television and Telecommunications Council, of the *Consortium de télévision Québec-Canada* and of *Société Radio-Canada [CBC]*

#### A . Relevance of federal participation

1. In your opinion, what major changes have marked the Canadian audiovisual landscape in recent years, particularly in regard to television?
2. In this context, what should be the role or place of TV5 in the Canadian audiovisual landscape?
3. In your opinion, is the federal participation in TV5 still relevant?
  - What should be the role of the federal government in regard to TV5?

#### B . Implementation of federal participation

4. TV5 is managed by two operators, *Satellimages* and the *Consortium de Télévision Québec-Canada*. In your opinion:
  - What are the advantages and disadvantages of this structure for Canada?
  - Is this structure functional?
  - What should be the responsibilities of each of the operators?
5. According to the present formula of TV5, operating budgets include common costs assumed by the five funding governments, in the following proportions: France 6/9, Belgium 1/9, Switzerland 1/9, and Canada/Quebec 1/9. The two operators of TV5 also collect cable and advertising revenues. Canada's planned funding for TV5 in 2001-2002 is \$10.3 million.
  - What are the advantages and disadvantages, for Canada, of the current distribution of funding among the partners?
  - Is this formula valid?
  - Is Canada's contribution advantageous, given the benefits obtained?
6. In your opinion, can other sources of funding be envisaged for the TV5 channel?
7. Can we foresee a day when federal participation will no longer be necessary for TV5? If we can, what factors would lead to such a situation?





8. In your opinion, to what extent is the Canada-Quebec collaboration for this initiative a success?
- How could this initiative be strengthened?

**C . Effects of federal participation**

9. To what extent does Canada's participation in TV5 have an impact on the Canadian French-language audiovisual production industry, from the following points of view?
- Additional sources of revenue for artists and producers.
  - Increase in the supply of better-quality Canadian French-language products.
  - Access by Canadian artists and producers to a broader, more varied audience throughout the world (ratings of Canadian programs outside Canada, expansion over the years, etc.).
  - Job creation in Canada.
10. To what extent is the federal participation in TV5 beneficial for the Canadian population, from the following points of view?
- Promotion of Canadian cultural diversity outside Canada.
  - Offering a window on the culture of various countries in the worldwide Francophone community (*La Francophonie*).
11. To what extent is federal participation having an impact on the spread of Canada's influence abroad?
- Does the federal participation in TV5 allow Canada to assert a leadership role within the international Francophone community?
12. What are the positive and negative impacts of TV5?
- Are there any unexpected impacts of the federal participation in TV5?
13. Overall, is the federal participation in TV5 meeting the expectations of the federal government?

**D . Possible options**

14. What do you think of the current CTQC management formula?
- Would you have another formula to propose?
15. What do you think of the current management formula of Satellimages?
- Would you have another formula to propose?
16. Can we envisage more efficient ways of using the funds that the federal government devotes to TV5?

17. How could we maximize the impact of TV5 on the following?
- a. Canadian artists and producers.
  - b. The supply and quality of Canadian French-language products?
  - c. Job creation here in Canada.
  - d. The spread of Canada's influence abroad.
  - e. The Canadian population.
18. Have you any other comments that would be useful for this evaluation?

**Thank you for your collaboration!**



## Evaluation of the federal participation in TV5

### Focus groups with viewers

#### Facilitator's Guide

Instructions for the facilitator:

- a. The facilitator introduces himself or herself, and explains the purpose of the study, which is to evaluate the TV5 channel. The study was commissioned by the Department of Canadian Heritage.
  - b. There are no right or wrong answers. Every person will be encouraged to express his or her point of view. The facilitator's role will be to ensure that everyone can express themselves freely.
  - c. Note the presence of the client behind the glass, where applicable.
  - d. The discussion will last about two hours.
  - e. The conversation will be recorded, solely for the purpose of noting down the comments after the session.
1. Perhaps we can start by introducing ourselves. I suggest that we go around the table quickly, so that everyone can state their name and perhaps say what they do for a living.

#### **A . Audiovisual preferences and behaviour**

2. I would like to ask you some questions about the television programs you watch. What kind of programs do you prefer to watch?
3. Do you have any preferred television channels?
  - a. Why do you prefer them to others?
  - b. What is a good television channel for you?
4. How many channels do you watch regularly?
  - a. Do you tend to watch the same television channels all the time?
5. What do you expect from French-language channels like Radio-Canada, TVA, Télé-Québec, TFO?



## B . Perceptions of TV5

6. How would you describe TV5? If I asked you to tell me in one sentence what TV5 does, what would you say?
7. In your opinion, who watches TV5? Why do they watch TV5?
8. What makes TV5 different from the other French-language channels?
  - a. What are the strengths and weakness of TV5 in comparison to other channels?
  - b. Why do you watch TV5?
9. Are you generally satisfied with TV5? In other words, with:
  - a. Its programming? The variety of its programs?
  - b. Its format?
  - c. The schedule of its programs?
10. If you were in charge of programming, what would you change?
11. If the TV5 channel ceased to exist, for whom would that make a difference?
  - a. Would it make a difference for you?

## C . Impacts

12. What is, in your opinion, the mission of TV5?
  - a. What should be the mission of TV5?
13. One mission of TV5 is to make *la francophonie* [the worldwide Francophone community] better known. On the basis of what you know of TV5, do you have the impression that the channel is reaching this objective?
  - a. Are you learning things about France, Belgium, Switzerland, Canada, Quebec and other Francophone countries?
  - b. What would you like to know about those countries?
  - c. Is this mission worthwhile?
  - d. Is TV5 unique in this sense?
14. TV5 programming outside Canada is different from the TV5 programming that is broadcast in Canada and Quebec. What are your comments on this?
15. Do you see any other effects or influences that TV5 might have on the Canadian public?



- a. On the Francophone public abroad?

**D. Role of federal government and funding formula**

16. In your opinion, is there a connection between the federal government and TV5?
  - a. What is this connection?
17. Does the federal government have a role to play in regard to TV5?
  - a. What should that role be?
    1. A financial role?
    2. A role as advisor?
    3. A regulatory role?
    4. A management role?
  - b. Do the governments of other Francophone countries have a role to play in TV5? What should that role be?
18. The federal government funds TV5 in partnership with Quebec and other Francophone governments, including France, Belgium and Switzerland.
  - a. What do you think of that role?
  - b. Is it appropriate? Is it justified?
19. At the present time, the sources of funding for TV5 include funding from governments, cable revenues and rebroadcasting revenues. Do you see any other possible sources of income?
20. At the present time, there is are no advertising spots on TV5. In your opinion, would advertising be a valid source of revenue for TV5?
  - a. Would you object to there being advertising spots?
  - b. Do you have any suggestions or preferences regarding the format, in other words, the most appropriate moments for advertising spots on TV?

**E. Conclusion**

21. In conclusion, I would like you the tell me howTV5 could be improved. Do you have any suggestions?
22. What future do you see for TV5?
  - a. What place will TV5 occupy, given the increasing number of channels?



**Canadian  
Heritage** **Patrimoine  
canadien**

**Canada**

23. Do you have any other comments to make on TV5 and on the discussion that we have had this evening?

**Thank you very much for your participation!**



Canadian  
Heritage

Patrimoine  
canadien

Canada

TV5

## Telephone survey

1. (Do not ask the question) Sex:

Male

Female

DNK

2. I would like to begin by asking you how many **different** programs you are familiar with from TV5?  
Do you know one, two, three or more than three?

1 (Go to Question 6.)

2 (Go to Question 6.)

3 (Go to Question 3)

4 or more (go to Question 2)

DNK/DNA

3. I would now like to know to what extent you are satisfied with the following aspects of the TV5 channel. For each aspect, answer using a scale from 1, very dissatisfied to 5, very satisfied. The mid point, 3, means you are neither satisfied nor dissatisfied. If you do not know, do not hesitate to let me know.

(rotation)

- a. The diversity of programs.
- b. The distribution among Canadian, French, Swiss and Belgian programs.
- c. The schedule of the programs.
- d. The overall quality of the programs on TV5.
- e. The quality of the general presentation of the channel



Canadian  
Heritage

Patrimoine  
canadien

Canada

4. Using a scale from 1, very dissatisfied, to 5, very satisfied—the mid point, 3, being neither satisfied nor dissatisfied—tell me to what extent you are generally satisfied with the TV5 channel.
5. What is your favourite program on TV5? (Interviewer: Please put it in to one of the following categories).

Cultural program (e.g., *Bouillon de culture*, hosted by Bernard Pivot).

Variety program

Information program (news)

Conversation and discussion program (not on cultural topics)

Sports program

Documentary

Fiction and series

Other type

6. Using a scale from 1, very dissatisfied to 5, very satisfied, say to what extent you are satisfied with the following aspects of this program.

(rotation)

- a. The quality of contents of the program.
- b. The quality of the presentation.
- c. The duration of the program.
- d. The time slot that the program occupies in the schedule.
- e. The quality of the language of the program (in general).

7. What is your second most favourite program? (Interviewer: Please put it in one of the following categories:)

Cultural program (Example: *Bouillon de culture*, hosted by Bernard Pivot)





Variety program

Information program (news)

Conversations and discussion program (not on cultural topics)

Sports program

Documentary

Fiction and series

Other type

8. Using a scale from 1, very dissatisfied, to 5, very satisfied, indicate to what extent you are satisfied with the following aspects of this program.

(rotation)

- b. The quality of the content of the program
- c. The quality of the presentation.
- d. The duration of the program.
- e. The time of the program in the schedule.
- f. The quality of the language of the program (in general).

9. How many hours a week do you watch TV5? (If the respondent does not know, ask how many hours in the last two weeks.).

\_\_\_\_\_ hours

DNK/DNA

10. I am now going to read you a certain number of statements. For each statement, I would like you to tell me to what extent you agree or disagree with the statement, using a scale from 1 to 5 where 1 means completely disagree, 5 means completely agree, and the mid point 3 means neither agree nor disagree.

(Rotation)

- a. TV5 allows me to know the other countries of *la francophonie* better.

- b. TV5 allows me to know more about events on the international scene
- c. TV5 is an effective showcase for making Canadian artists known to the Canadian public.
- d. TV5 should present a limited number of advertising spots, to increase its funding.
- e. TV5 is not an essential channel, given the presence of Radio-Canada, Télé-Québec and TFO.
- f. TV5 should contain more Canadian programs.
- g. TV5 should contain more European programs.

11. (Quebec and Ontario only) How do you compare TV5's programming with the programming of Télé-Quebec (Ontario: TFO)? Is the programming more satisfying than, less satisfying than or as satisfying as Télé-Québec (Ontario: TFO)?

less satisfying

as satisfying

more satisfying

DNK/DNA

12. If the TV5 channel ceased to exist, would that make a difference in your region?

Yes

No

DNK/DNA

13. If the TV5 channel ceased to exist, would that make a difference to you?

Yes

No

DNK/DNA

14. In your opinion, is there a connection between the federal government and TV5?

Yes



No

DNK/DNA

15. Should the federal government provide financial assistance to TV5?

Yes

No

DNK/DNA

16. I am now going to read you a certain number of statements. For each statement, I would like you to tell me to what extent you agree or disagree with the statement, using a scale from 1 to 5, where 1 means disagree completely, 5 means agree completely, and the mid-point 3 means neither agree nor disagree.

(Rotation)

- a. TV5 is helping Canada to affirm a leadership role within the international Francophone community.
- b. TV5 is an effective showcase for making Canada and Canadian artists known around the world.
- c. TV5 allows Canadian producers and artists to gain access to a broader audience, and offers that a source of additional income.
- d. TV5 allows jobs to be created in Canada.

In conclusion, I would just like to ask you a few questions, for statistical purposes.

17. What language do you speak at home?

French

English

Spanish

Italian

Other



Canadian  
Heritage

Patrimoine  
canadien

Canada

DNK/DNA

18. On average, how many hours a day do you spend watching television in general?

Hours:

DNK/DNA

19. What is your educational level?

Less than secondary studies (less than the French baccalaureate)

Secondary studies completed

College studies (incomplete)

College or technical school diploma

University studies (incomplete)

University undergraduate degree (Canadian bachelor's degree or French *licence*)

Master's degree or doctorate

DNK/DNA

20. Are you a native-born Canadian?

Yes

No

DNK/DNA

21. (If not) At what age did you arrive in Canada?

DNK/DNA

22. I am going to read you a list of income categories. Please indicate the category that corresponds to your household's income before taxes.



Canadian  
Heritage

Patrimoine  
canadien

Canada

Less than 10000

10000 to 19000

20000 to 29000

30000 to 39000

40000 to 49000

50000 to 59000

60000 to 69000

70000 or more

If not certain:

Is it more or less than 30000?

More than 30000

Less than 30000

If more:

Is it more or less than 50000?

More than 50000

Less than 50000

23. In what year were you born?

19\_ \_

DNK/DNA



## Appendix B: Survey response rate

Total number of calls	1549	
Numbers changed	32	
Fax machines/computers	5	
Language problem (other language)	21	
Non-Francophone	19	
Non-viewer	141	
<b>Total inadmissible</b>	<b>218</b>	<b>17.4%</b>
<b>Total admissible:</b>	<b>538</b>	<b>51.8%</b>
Line busy	4	
No answer	115	
Voice mail	135	
Appointments	73	
Not available	39	
Target reached	64	
Initial refusal	103	
Refusal in the middle of the interview	5	
Total refusals	108	
<b>Interviews completed</b>	<b>500</b>	<b>48.2%</b>
	1038	
Net response rate		75.8%



## **MANAGEMENT'S RESPONSE TO THE EVALUATION REPORT ON THE GOVERNMENT OF CANADA'S PARTICIPATION IN TV5**

### **Introduction**

- The process of evaluating the TV5 Program began in January 2001, at the same time that the five funding governments of the multilateral network (France, Switzerland, the Communauté française de Belgique, Canada and the Government of Quebec) were conducting a significant reform of the administrative structures of the international TV5 network.
- This evaluation confirmed:
  - the advantage and relevance of Canada's participation in TV5 since 1986;
  - the attainment of the two fundamental objectives set by Canada for its participation in TV5: (1) to increase Canada's international presence by providing a special international showcase for Canada's French-speaking artists and producers, and (2) to give Canadians an additional French-language television channel; and
  - the exceptional cost-benefit relationship between the cost of the federal government's participation in TV5 and the exposure given by the network to Canadian programming in over 150 countries.
- At the same time, the evaluation recommended ways to maximize the spin-offs of Canada's participation in TV5 and therefore endorsed the work accomplished by the Department of Canadian Heritage (PCH) in the wake of TV5's significant administrative restructuring.

### **Management's response**

- PCH is satisfied with the results of the evaluation conducted by the firm Goss Gilroy confirming benefits and relevance of Canada's participation in TV5 and the appropriateness of the initiatives already taken by the Department to maximize the benefits and spin-offs of this participation.
- While the evaluation recommends that management of the multilateral network be more flexible, the five funding governments of TV5, including Canada (represented by PCH), have already agreed on an administrative restructuring of the network to enhance its competitiveness:
  - since August 1<sup>st</sup>, 2001, TV5's management has been consolidated under a single operator, TV5 Monde, while the Canadian signal continues to be managed by a Canadian operator in Montreal, the Consortium de télévision Québec Canada; the Société Radio-Canada represents the federal government on TV5 Monde's Board of Directors, which consists exclusively of public broadcasters.

- With respect to the third recommendation, PCH will continue to work with TV5 Monde, the SRC and other partners in order to raise the profile of Canadian French-language productions that are broadcast on TV5 Monde.
- With respect to the fifth recommendation, which suggests the formulation of a strategic approach be updated to attract a younger audience in particular, it must be noted that PCH does not participate in the management of the TV5 network. The federal government's participation in TV5 is governed by (1) a financial contribution agreement and (2) the appointment of members who sit on the various boards of directors (which are the network's senior decision-making structures) and by participating in meetings of senior officials and the Ministerial Conference. Therefore, any recommendation regarding network decisions (for example, the defining of target audiences) should be interpreted with these limits in mind. Any decision regarding network target audiences must be made by the management teams of the CTQC and TV5 Monde, the network's two operators. However, we have noted that one of the priorities of the new CEO of TV5 Monde is to attract and retain a younger audience.
- The table below lists all of the activities/action taken by PCH that directly respond to the five (5) recommendations included in the TV5 evaluation report (page vi):

RECOMMENDATION	ACTIVITY / ACTION UNDERWAY
<p>■ If decision-making is centralized for TV5, the federal government should make sure that Canada is represented in the new structure in order to protect its interests.</p>	<p>In accordance with the agreement announced on June 22<sup>nd</sup> 2001, by the five funding governments on the simplification of TV5 management structures, the Government of Canada will now be represented by the Société Radio-Canada on the TV5 Monde Board of Directors.</p> <p>In addition, TV5's operator in Canada, the Consortium de télévision Québec Canada (CTQC), will now be controlled by exclusively by Canadian interests.</p> <p>The Government of Canada participates in all TV5 policy bodies, including the senior officials' meeting and the Ministerial Conference.</p>
<p>2. Evaluate the cost- effectiveness of participant suggestions regarding potential additional sources of funding, including broadcast advertising.</p>	<p>The discussions currently underway among CTQC funding partners on the reorganization of TV5 broadcasting operations in Montreal, as a result of TV5 administrative restructuring,</p>



	<p>call for the review of new funding sources, including advertising. TV5 Québec Canada's current licence <u>prohibits</u> the use of advertising. This issue could be revisited as part of the licence renewal process, which will take place in August 2002.</p>
<p>3. Since TV5 does not meet the expectations as regards to export of audiovisual products, the Department should review this matter and establish an approach that would generate more spill-over benefits for these producers.</p>	<p>The Government of Canada's objectives for its participation in TV5 are (1) to increase Canada's international presence by providing a special international showcase for Canada's French-speaking artists and producers, and (2) to give Canadians an additional French-language television channel.</p> <p>In the wake of TV5's administrative restructuring, PCH will continue to work with its partners, including the Société Radio-Canada, to increase the international profile of Canadian French-language programming.</p>
<p>4. Given that the majority of TV5 viewers are not aware of the federal government's contribution to TV5, the program managers should find a way of conveying this information to Canadians. Not only would this ensure greater transparency, it is also in the federal government's interest that Canadians to be aware of the support it provides for the promotion of Canadian values and cultural diversity.</p>	<p>The IFD will review the possibility of introducing certain parameters in the next contribution agreement with the CTQC to increase awareness of the federal government's role within TV5.</p> <p>In addition, the IFD, along with the Communications Branch, will review other means to better inform Canadians about the federal government's involvement in TV5.</p>
<p>■ The study identified some dissatisfaction with TV5 among young Canadian television viewers. Since one of TV5's objectives is to develop the largest audience possible, the Government of Canada, as a funding party for the channel, should encourage greater diversity of target audiences. Steps should be taken on the Canadian front to attract and retain a younger audience. According to recent studies, young people are more interested in American culture than their own Francophone culture.</p>	<p>The two operators of TV5, i.e., - the CTQC and TV5 Monde, - manage the international network independently. Therefore, defining the target audiences is the exclusive responsibility of the operator management teams and their respective boards of directors.</p> <p>However, as for attracting and retaining a younger audience, this objective is already listed among the priorities of the new CEO of TV5 Monde for 2002-03, Serge Adda.</p>