



Public Opinion in Kamloops, BC
on Free TV

July 13-15, 2009

Conducted for the
Canadian Media Guild

Summary of the poll findings

An overwhelming majority – 84% – of people in Kamloops say it’s unfair that people in smaller cities won’t be able to watch free over-the-air TV channels while people in major cities will, after broadcasters change to digital signals but only serve major cities.

People with lower household incomes (under \$40,000 annually) are somewhat more likely than high-income people to say that not providing free TV signals in smaller cities is not fair. Lower income TV households in Kamloops are more likely than higher income households to rely exclusively on rabbit ears or antennas for their sets.

(Q5) As you may know, television broadcasters want to provide the new free digital signals only in major cities, such as Vancouver, Toronto, Montréal and Ottawa, not in smaller cities like Kamloops. That means in Kamloops people will lose the option to watch TV for free with rabbit ears or an antenna. Do you think it is fair that people in smaller cities and towns won’t be able to watch free over-the-air TV channels while people in major cities will?

	Total	Satellite users	Women	Men	<\$40,000 h/h income
Yes, fair	8%	11%	6%	11%	6%
No, not fair	84%	78%	86%	80%	87%
Depends	4%	2%	4%	5%	4%
No opinion	4%	8%	3%	4%	3%

Lower income households in Kamloops have two TV sets, on average, while households with annual pre-tax incomes over \$70,000 have around three sets on average, according to the Canadian Media Guild survey conducted July 13-15. Most antenna users have one set.

(Q2) How many working television sets do you have in your household?

Census of TV sets in Kamloops						
	How they watch				Annual h/h income	
	Total	Antenna	Cable	Satellite	<\$40,000	\$70,000+
1	25%	67%	27%	24%	41%	12%
2	38%	28%	36%	45%	33%	36%
3	25%	5%	25%	24%	20%	32%
4	7%	—	8%	5%	4%	13%
5+	5%	—	4%	2%	3%	7%
Average	2.33	1.38	2.31	2.16	1.99	2.71

Cable TV has the biggest share of the TV market in Kamloops – 7 in 10 TV households use cable compared with three in 10 who have satellite service and 6% who use rabbit ears or some form of antenna. Only 3% of Kamloops TV households use antennas or rabbit ears exclusively.

Cable is the service of choice among lower-income households – 76% in the under-\$40,000 group use cable and 18% satellite service. Among higher income households (\$70,000+) 63% use cable and 35% have satellite TV service, according to the Canadian Media Guild survey.

(Q3) For each television set, please tell me if it is connected to cable service, uses satellite service or uses rabbit ears, an outside or rooftop antenna or some other form of antenna.

How about your first, second... television set...

How Kamloops watches TV					
	Annual pre-tax household income				
	Total pop.	Internet TV viewers	<\$40,000	\$40-69,999	\$70,000+
Cable	69%	58%	76%	69%	63%
Satellite	28%	33%	18%	32%	35%
Rabbit ears or antenna	6%	10%	10%	2%	7%
Cable only	63%	44%	68%	64%	56%
Satellite only	23%	31%	12%	27%	28%
Ears or antenna only	3%	8%	6%	1%	3%
Cable, satellite and antenna	10%	16%	11%	6%	13%

While few people in Kamloops watch TV shows on the Internet at home (12%), Internet TV viewers are the most likely to have sets with antennas or rabbit ears and no other TV service.

Internet TV viewers are younger than people who watch conventional TV sets. Some 43% of Internet TV viewers are under 25; 67% are under 35. In antenna households without cable or satellite service, three in 10 people say they watch TV shows on the Internet at home. In homes using only satellite or only cable service, 11% watch TV on the Internet.

(Q14) Do you watch any TV programs on the internet through a home internet connection?

Who watches TV on the Internet in Kamloops			
Total	Men	Women	Antenna-only household
12%	16%	11%	31%

More than three out of four people in Kamloops TV households (76%) have heard little or nothing about the upcoming change in the way TV stations broadcast over the air from analog signals to digital signals.

About a quarter of the people in Kamloops television households (24%) are following the issue closely and say they have read or heard “a lot” about it.

People in households with antennas or rabbit ears (and no cable or satellite service) are the most inclined to say they have heard “a little” while people with cable or satellite are more likely to say they have heard “a lot.” People most likely to know about the change to digital are men, people with more than one TV set at home, people who view TV programs on the Internet and respondents in higher than average income households.

(Q4) Right now people in Kamloops have options for the way they watch television, by paying for cable or satellite or by watching free over-the-air television channels using rabbit ears, an outside or rooftop antenna or some other form of antenna. In two years, television stations in Canada are scheduled to change the way they broadcast over the air from what is called an analog signal to a digital signal. How much, if anything, have you read or heard about this upcoming change?

	Total	Women	Men	Internet TV viewers	\$70,000 h/h income
A lot	24%	20%	31%	35%	33%
A little	50%	49%	52%	41%	46%
Nothing	26%	32%	17%	24%	21%
No opinion	<1%	<1%	<1%	—	<1%

About a third of the television viewers in Kamloops who will lose free over-the-air TV in the switch to digital signals say they will just live without TV signals on their sets that use rabbit ears or some other form of antenna, including 48% of the people whose TV sets receive over-the-air signals exclusively.

Half say they are most likely to use the Internet or subscribe to cable or satellite TV services if their community loses free over-the-air channels.

Lower income people say they are more likely to watch TV programs on the Internet if Kamloops no longer has free over-the-air channels while higher income people (\$40,000+ a year households) are more likely to say they will subscribe to cable or satellite services.

Higher income households, since few have sets using antennas anyway, are the most inclined to think they would live without free over-the-air channels.

(Q6) [Interviewers asked respondents using rabbit ears or an antenna...] When the changeover from analog to digital happens, you will no longer have free over-the-air channels in Kamloops even if you buy a digital converter box for an old TV or buy a new digital TV. You will not be able to watch television shows unless you pay to subscribe to cable or satellite service or watch TV shows on the Internet. Although the change is two years away, without free over-the-air television channels in Kamloops what do you think you are most likely to do about a TV set of yours that uses rabbit ears, an outside or rooftop antenna or some other form of antenna?

Without free channels, what are people likely to do?			
Base: households using rabbit ears or antenna			
	Households using antenna or rabbit ears...		
	Total	...Only	... and cable or satellite
Subscribe to cable	12%	–	28%
Subscribe to satellite	17%	–	39%
Watch TV shows on the Internet	23%	42%	–
Just live without any television	32%	48%	14%
Depends	14%	10%	13%
No opinion	3%	–	6%

Nearly all the people in Kamloops who rely on rabbit ears or other antennas for their TV sets (91%) say they would watch just three free over-the-air channels – not pay for cable or satellite – if the government requires broadcasters to provide Kamloops with three over-the-air TV channels that people could watch using rabbit ears or an outside antenna.

Some 5% of viewers using satellite service only would just watch the free channels and give up satellite. Among cable TV subscribers (who do not use rabbit ears, antennas or have satellite service), 15% would watch only the three free channels in a scenario where the government requires broadcasters in the digital era to provide three free channels in Kamloops that people could watch with an antenna or ears.

- (Q7) Suppose the government requires broadcasters to provide Kamloops with three free over-the-air TV channels that people could watch using rabbit ears, an outside or rooftop antenna or some other form of antenna. If that happened, would you pay to subscribe to cable or satellite TV service, or instead watch just the three free channels?

With 3 [unnamed] free OTA channels, what people in Kamloops are likely to do				
	Type of TV service			
	Total	Cable	Satellite	Antenna only
Pay for cable or satellite	72%	73%	84%	5%
Would watch just 3 free channels	16%	15%	5%	91%
Both (volunteered)	<1%	<1%	–	5%
Depends	9%	9%	7%	–
No opinion	3%	3%	4%	–

What if broadcasters provide six free over-the-air channels in Kamloops instead of just three? Increasing the number of free channels people could watch using rabbit ears or an antenna from three to six increases the share of Kamloops TV viewers who would watch the free channels by 25%, from 16% to 20%.

In lower income households the share who would watch just the free channels increases from 23% to 33% when the number of free channels goes from three to six.

Women are more attracted than men to the prospect of six free channels and are more likely than men to say they would watch just the free channels instead of subscribing to cable or satellite services.

Satellite subscribers are the most loyal to their TV service – 75% say even with six free channels they would continue paying for satellite or cable. Among cable-only households, 61% say they would pay for cable while 19% would defect and watch only the six free channels using rabbit ears or an antenna.

- (Q8) It has been suggested that broadcasters could provide Kamloops with six free over-the-air TV channels that people could watch using rabbit ears, an outside or rooftop antenna or some other form of antenna. If that happened, would you pay to subscribe to cable or satellite TV service, or instead watch just the six free channels?

With 6 [unnamed] free channels, what people in Kamloops are likely to do if they could watch the 6				
	Type of TV service			
	Total	Cable	Satellite	Antenna only
Pay for cable or satellite	63%	61%	75%	–
Would watch 6 free channels	20%	19%	9%	95%
Both (vol.)	1%	–	3%	–
Depends	14%	17%	12%	5%
No opinion	2%	3%	1%	–

Hearing descriptions of programs on the six channels in the Canadian Media Guild poll, however, attracts even more cable viewers to the free channels, but satellite TV subscribers still remain loyal to satellite service. Six free channels and cable apparently are substitutable for a portion of Kamloops TV watchers.

(Q9) Suppose the six free channels were the following:

- Global B.C., which has American dramas such as House and 24, and the B.C. and national news;
- CFJC, which has local news and American drama and reality shows;
- CBC, which has B.C. and national news, professional hockey and soccer, and Canadian dramas such as The Border and Being Erica;
- CTV, which has B.C. and national news, American dramas such as CSI, Canadian dramas such as Flashpoint, the Olympics, Canadian Idol and American Idol;
- The Knowledge Network, B.C.'s educational broadcaster
- Radio-Canada, which has French language programs.

If you could watch these six free over-the-air channels, would you pay for cable or satellite service, or instead watch just these six free channels?

After learning details on 6 free channels, what people are likely to do if they could watch them				
	Current TV service - only...			
	Total	Cable	Satellite	Antenna
Pay for cable or satellite	57%	55%	73%	5%
Would watch 6 free channels	33%	33%	18%	95%
Both (vol.)	1%	1%	2%	–
Depends	6%	8%	6%	–
No opinion	3%	3%	1%	–

People who watch TV a lot – seven hours or more a day during weekdays – are much less interested in the six free channels than viewers who watch less television.

Some 69% of seven-hour-plus viewers would pay for cable or satellite even if they could watch the six channels described in the survey, compared with 47% of viewers who watch three hours a day or less. People 18 to 34 are more inclined to say they would watch the six free channels, compared with people 35 and older. Some 42% of

those under 35 would watch the six free channels compared with 30% among older Kamloops TV viewers. Younger people are the most inclined to watch TV on the Internet. For them online TV is beginning to substitute for antennas, cable and satellite.

Interest in watching 6 free channels via ears or antenna instead of paying for cable or satellite				
	Current TV service - only...			
	Total	Cable	Satellite	Antenna
Before hearing 6 channels described	20%	19%	9%	95%
After hearing 6 channels described	33%	33%	18%	95%

A third of TV viewers using antennas or rabbit ears say they would be willing to pay up to \$80 for a digital converter box for their TV sets allowing them to watch the six over-the-air channels – with an antenna or ears – described by the interviewers.

Overall 21% in Kamloops TV households say they would pay up to \$80 for a converter so they could watch the six free channels. Satellite subscribers and viewers watching programs over the Internet are the least willing to pay \$80 for a converter for their TV sets.

(Q10) Would you personally be willing or not willing to pay up to \$80 for a digital converter box for your TV set that would let you watch these six free over-the-air channels?

Willing to pay up to \$80 for digital converter box to watch 6 free over-the-air channels				
	Annual household income			
	Total	<\$40,000	\$70,000+	Antenna only households
Yes, willing	21%	24%	26%	33%
Depends (vol.)	7%	6%	6%	11%
No, not willing	69%	67%	66%	56%
No opinion	4%	3%	2%	—

Almost no one is willing to buy a \$500 special receiver to see five or six free channels from companies providing satellite TV service in Kamloops.

Among residents who are the most interested in watching the six free channels outlined in the survey, instead of subscribing to cable or satellite, 1% are willing to pay \$500 for a special receiver to watch those five or six channels via satellite.

(Q11) It has also been suggested that companies providing satellite TV service could provide Kamloops with five or six free channels that would require using a special receiver that costs \$500. Would you personally be willing or not willing to pay \$500 for a special receiver that would let you watch five or six TV channels for free via satellite service?

Willing to pay \$500 for a receiver to watch 5 or 6 satellite channels				
	Annual household income			
	Total	<\$40,000	\$70,000+	Antenna only households
Yes, willing	1%	1%	2%	—
Depends (vol.)	2%	3%	3%	6%
No, not willing	96%	96%	95%	94%
No opinion	1%	—	—	—

People don't need more television sets to watch more TV programs. But they like having more channels as their TV watching grows. In Kamloops the more TV you watch the more likely you are to have cable or satellite service.

Residents who watch seven or more hours on a typical weekday have 2.48 sets on average while people watching under three hours a day have 2.30 sets. But eight in 10 people who only use rabbit ears or antennas watch TV less than three hours a day while 52% of people with cable watch three hours a day or more (on TV sets).

Some 25% of viewers who watch under three hours a day have satellite compared with 32% of viewers who watch seven or more hours. Antenna-only viewers make up 5% of those who watch under three hours and just 1% of those who watch seven-plus-hours. Age and TV watching are correlated. Some 63% who are 55 and older watch three or more hours a weekday. Some 59% of those under 35 watch two hours a day or less.

(Q12) About how many hours do you personally spend watching television programs on a TV set on an average weekday, Monday through Friday? Just your best guess will do.

Average weekday hours of TV viewed on TV sets			
	Total	Age 18-34	55+
Less than 1 hour	11%	17%	5%
1 or 2 hours	35%	42%	31%
3 to 4 hours	23%	15%	30%
5 to 6 hours	10%	8%	13%
7 to 8 hours	5%	3%	4%
9 hours or more	14%	14%	16%
Depends	2%	1%	2%

Nearly half the TV viewers in Kamloops say they most often watch American and other foreign programs on television; 26% say they most often watch Canadian programs. Antenna users who have no cable or satellite service are the most interested in Canadian programs (62%).

The audience for Canadian programs is older than average (34% among those 55 and older versus 21% in the 18-34-year-old cohort). Canadian TV watchers have below-average household incomes. People in households with one TV set are more inclined than households that have more sets to say they most often watch Canadian programs.

(Q13) Which of the following programs do you watch most often on television... Canadian programs, American programs or other foreign programs?

Programs TV viewers watch most often				
	Only...			
	Total	Antenna	Cable	Satellite
American programs	43%	16%	43%	43%
Other foreign programs	4%	—	3%	7%
Canadian programs	26%	62%	27%	23%
Canadian & American or all	14%	6%	13%	13%
Depends	10%	10%	12%	8%
No opinion	3%	5%	1%	7%

Watching TV on the Internet is no threat at the moment to conventional TV in Kamloops. In the Canadian Media Guild poll in July just 12% of respondents watch TV programs on the Internet at home. Among people under 35, 32% watch on the Internet.

Internet TV viewers spend much less time watching TV programs on the Internet than people spend watching programs on TV sets. Some 86% of those who view programs on the Internet spend two hours or less on an average weekday viewing programs on the Internet. In contrast, 46% of those who watch conventional TV sets spend less than two hours a day watching TV programs.

The most popular TV programs on the Internet are drama shows (named by 42%) and action or adventure programs (25%). Some 12% said situation comedies are their favourite shows on the Internet. Fewer than 10% named shows in any other categories such as local news, reality shows or talk shows. Respondents could name “the one or two you would miss the most if they weren’t available.”

(Q15) [Interviewers asked respondents who watch TV on the Internet...]
About how many hours do you personally spend watching television programs through the Internet on an average weekday, Monday through Friday?

Average weekday hours of TV viewed on ...		
	Internet	TV sets
Less than 1 hour	63%	11%
1 or 2 hours	24%	35%
3 to 4 hours	5%	23%
5 to 6 hours	–	10%
7 to 8 hours	–	5%
9 hours or more	3%	14%
Depends	5%	2%

Kamloops residents who watch television on the Internet are more likely than viewers who watch on TV sets to say the programs they watch most often on the Internet are American or other foreign shows.

Some 60% who watch TV on the Internet say they most often watch American programs, while 22% say they most often watch Canadian programs. Among people who watch on TV sets, 43% say their most-watched shows are American versus 26% who say Canadian.

(Q16) What are your favourite television shows or programs that you watch on the Internet, the one or two you would miss the most if they weren't available?

Internet TV viewers' favourite shows	
Drama shows	42%
Action, adventure	25%
Situation comedies	12%
Channels, networks	9%
Local news	9%
Reality shows	5%
Talk shows	5%
Other	16%
None/no opinion	16%

(Q17) Which of the following television programs do you watch most often through the Internet...Canadian programs, American programs or other foreign programs?

Programs Internet TV viewers watch most often	
American programs	60%
Other foreign programs	9%
Canadian programs	22%
Canadian & American or all	3%
Depends	3%
No opinion	1%

Method

The findings in this poll are based on 502 telephone interviews conducted between July 13 and 15, 2009, with respondents in Kamloops, B.C., who have a working television set. In the initial sample respondents without a working TV set equal 1% of Kamloops households.

The sample of phone numbers was drawn by recognized probability sampling and by a method that gave all residential telephone numbers in Kamloops, both listed and unlisted, an equal chance of being included in the poll.

Vector Research weighted the data by age, a known characteristic of the Kamloops population.

In sampling theory, in 19 cases out of 20 (or 95% of all samples), the results based on a random sample of 502 will differ by no more than ± 4.4 percent in a population (aged 18 and over) the size of the adult population in Kamloops.

This means you can be 95% certain that the survey results do not vary by more than 4.4 percent in either direction from results that would have been obtained by interviewing all adults in the city of Kamloops.

The maximum margin of sampling error for subgroups such as women or men is larger.

To get error margins for any group in this poll use the calculator at www.surveysystem.com/sscalc.htm.

Samples of any size have some degree of precision. Larger samples are generally more precise but sometimes not. The important rule in sampling is not how many respondents are selected but how they are selected.

One method to guarantee that all members of a population have a known chance of being polled includes dialing randomly generated phone numbers to ensure that people with unlisted numbers are included. Another is to dial the number repeatedly when no one answers to ensure that people often away from home are sampled.

The margin of error refers only to sampling error. Even in true random samples, factors such as the wording of questions can compromise precision. The order in which interviewers ask the questions may lead to different results.

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