Abstract

This study examines the audience performance of CBC Radio. Adopting an innovative statistical method from a 2002 study authored by Robert Picard, this study accounts for competition among radio stations to present a meaningful picture of CBC Radio's performance against expectations. This is done on a province-by-province basis from 1999-2007, the most recent period for which market share data is available through Statistics Canada. The study finds that CBC Radio's performance generally exceeds expectations by a modest margin, though performance is noticeably stronger in British Columbia and weaker in Prince Edward Island.
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Dedication

To my parents,

for everything.
Chapter 1: Introduction

This study examines CBC Radio's audience performance between 1999 and 2007 against its private sector competitors. It compares measured audience market share against expected average market share on a province-by-province basis, replicating a 2002 study authored by Robert Picard that pioneered this method and applied it to various European public service broadcasters (PSBs) (Picard 2002a). Picard found that most European PSBs exceed statistical expectations for their market share, and in most cases led their respective markets (ibid.).

Research suggests that Canadians generally feel that the CBC's use of the hundreds of millions of taxpayer dollars it receives each year is justified (Finn, McFayden and Hoskins 2003, 190). Canadians' feelings in this regard, however, hinge largely on the use they make of the CBC – non-use value accounts for somewhere between 25% and none of their perceived value of the CBC (ibid.). Better understanding the market performance of the CBC (i.e., how much it is used compared to its competitors) further refines our knowledge of how it relates to the audience it serves. Picard's approach makes market share data more meaningful by accounting for the number of competing media outlets in a given market to generate statistical expectations of average outlet performance (Picard 2002a). Applying it to the CBC will further our understanding of how it fares against its competition.

CBC Radio's national audience was roughly 3.8 million people between 2005 and 2007 (CBC Annual Report 2006-2007, 37, CBC Annual Report 2005-2006, 27), representing its largest audience share in eight years (StatsCan, 2008). That share varied from 9% to 12% in the last 10 years of data available from Statistics Canada (ibid.). While these detail the scope of CBC's listenership, they do not communicate anything about how competition affects PSB market share – an important consideration, given the impact of increased competition on the CBC's television operations (Eillis 1991, quoted in Hoskins and
To date, research done on many aspects of the CBC and its audience appears underdeveloped (Eaman 1994, ix).

Ien Ang offers a powerful warning against leaning too heavily on ratings in her book *Desperately Seeking the Audience*. Ratings view the audience from a perspective above or outside it, portraying the audience as an objectified group needing to be shaped, manipulated, or controlled (Ang 1991, 5). They are a way of “making the audience visible in such a way that it helps the institutions to increase their power to get their relationship with the audience under control” (ibid., 7). This applies, she argues, regardless of whether an audience is thought of as a collection of citizens or as a public in need of education, information, entertainment, and possible reform so they may better perform their democratic function (ibid.). Audiences are controllable, external objects (ibid., 5). In practice, according to Ang, any attempts to reform an audience will fail because reform demands an understanding of audiences that goes beyond what ratings can provide (ibid., 103).

The suggestion that ratings are not the only tool required to understand the performance of a PSB has traction, but that is not to say ratings are unnecessary. Ratings, while not the only tool needed to understand a PSB’s performance, can still be meaningful and useful for doing so. Broadcasting aiming to serve the public can only fulfil that goal if the public in question tunes in. Studying ratings is an important component of understanding public service broadcasting.

This is confirmed by their appearance in PSB studies. For example, Lund and Berg's 2009 study uses comparative analysis of television PSB ratings performance in Denmark, Sweden and Norway from 1987 to 2006 to discuss government policy's relationship with market share (Lund and Berg, 2009). Nord and Ibarra's work on the television PSBs of Spain and Sweden between 1995 and 2005 uses market share as a measure of a PSB’s performance.
(Nord and Ibarra 2008, 11). PSBs also use ratings to justify themselves to the publics they serve (e.g., CBC Annual Report 2005-2006).

This study's main research question is, “how does the actual audience performance of the CBC on a province-by-province basis compare with statistical expectations of audience performance between 1999 and 2007?” Answering this question will further our understanding of CBC Radio's performance in relation to private broadcasters – an important consideration to the extent that public service broadcasting aims at different ends than private broadcasting. As will be shown, such a difference exists and PSBs serve an important function in modern democratic life. The CBC is no exception to this. Indeed, as the Committee on Canadian Heritage found in 2008, the CBC is Canada's only national radio broadcaster delivering education, culture and entertainment from coast to coast in both English and French (Committee on Canadian Heritage 2008, quoted on insidethecbc.com 2008). Given CBC Radio's long history and prestigious reputation, it seems likely that any comparison with its private competitors will reflect favourably on the Corporation.

Concern about the continued viability of PSBs in Europe has garnered attention at least since the early 1980s. Garnham, writing in 1983, expressed fear that the BBC was in the process of slowly transforming into a de facto commercial station in the face of competition from the commercially-oriented network Independent Television (ITV) (Garnham 1983, 23). In 1998, Tracey compared preserving PSB into the new millennium to “the preservation of primeval bugs in amber” (Tracey, 1998, 33). Lange argues that corporate convergence and technological innovation could undermine public service broadcasting across Europe (Lange 2006, 1). Picard describes PSBs in Europe as facing increased competition and market upheaval from the early 1980s to 2002 (Picard 2002a, 227). However, research on public service broadcasting in Canada has tended to focus on matters of broadcasting policy (e.g. Raboy 1990). This research will focus on the influence of competition on a PSB in Canada.
In 1972, Canadian broadcasting pioneer Graham Spry gave a speech in Ottawa in which he identified the ultimate aim of broadcasting in Canada as producing a strategy of identity (Spry 1975, 89). Spry advocated a specific remedy to the looming problem of cultural assimilation into the United States: the reformation of the Canadian Broadcasting Corporation (CBC) and the increased circulation of its programs (ibid., 93-94). If control of communication can foster community, the best way for a community to ensure its continuity is to control its communication. This is best done through one of the primary organs of large-scale collective action, government. Therefore, Spry considered government-funded broadcasting as a viable tool for nation-states concerned with their cultural sovereignty (ibid., 93).

Given Spry’s influential role in founding the Canadian Radio League and lobbying the federal government to create a national public broadcaster in the 1930s (Babe 2000, 40-41), his advocacy of CBC reform and promotion might not be surprising. Equating, on some level, the fate of a PSB with that of a democratic nation-state, however, is not a radical idea; scholarly examples are manifold. Ferguson argues that public service broadcasting and nationalist values are deeply entwined in English-speaking Canada (Ferguson 2006, 192). Splichal also contends that the ideal of public-service media sits at the heart of the ideas of publicness and democratic government (Splichal 2006, 17), while Garnham presents public service broadcasting as a necessary alternative to commercial broadcasting which, if unchallenged, will strip a nation-state of its strategic and cultural power (Garnham 1983, 27). Tracey goes so far as to regard the decline of public service broadcasting in Britain as a challenge to “the whole character of our lives, ... principles and values and moral systems” and, indeed, democracy itself (Tracey 1998, xvi). Raboy contends that “the fundamental question of democracy” lies at the heart of all the debates surrounding communication, culture, and public service broadcasting (Raboy 1990, 355). Though none of these thinkers
take a uniformly positive view of PSBs – Garnham, for example, critiques the British Broadcasting Corporation as too eager to serve the state and ruling elites at the expense of the working class (Garnham 1983, 25) – they all agree that PSBs can play a vital role in serving the interests of the citizens of a nation-state and in some fashion contribute to that state's cohesion and continuity.

This study is important because it will measure an under-studied aspect of the performance of a Crown corporation with a unique mandate and an annual budget that approached $2 billion in 2008-2009 (CBC Annual Report 2008-2009, 61). The measurement will be done in a fashion that makes it easier to avoid the common confusion around the importance of market shares and the causes of changes in those shares (Picard 2002a, 228). It also adds to what we know about how well CBC Radio fulfils its unique mandate to cultivate national identity in Canada (Broadcast Act 1991, 3(1)(m)).

Meeting this goal may have been more difficult between 1999 and 2007 (the period examined in this study) than in previous years. As Picard points out in The Economics and Financing of Media Companies, media outlets must compete with other outlets in the same format (intramedia competition) and with outlets of all formats (intermedia competition) (Picard 2002b, 149-150). The Internet may have made each audience member into a potential competitor for the CBC: as Shirky writes in Here Comes Everybody, in the modern world everyone with access to the Internet is a potential media outlet (Shirky 2008, 55). Getting them to pay attention to a single given outlet is therefore more difficult than ever before. Measuring the CBC's effectiveness in recent years is thus a matter of some interest.

This is complicated by the status of multiculturalism in Canada. Modern media and transport technologies increasingly allow immigrants to feel themselves members of what Karim dubs trans-nations; diasporic communities that overlap traditional national borders (Karim, 2006, 272). This tendency can subvert mass communications systems, which
potentially reinforce belief in the political validity of a nation-state (ibid., 269). Canada, with a higher per capita immigration rate than any European nation excepting the Isle of Mann, Luxembourg and San Marino (CIA World Factbook, 2010) may be more susceptible to this phenomenon than European countries. Canada, as a former British colony, also has a long history of immigration. Examining the performance of PSB in Canada over the period of time examined in this study is thus important and interesting.
Chapter 2: Literature Review

My work aims to better understand the condition of public service broadcasting in Canada, and is situated within the scholarly debates about public service broadcasting and competition between media outlets. As such, the literature review will comprise two sections. The first will address the role of public service broadcasting in Canada. The second will review the competitive landscape of radio broadcasters in Canada in the late twentieth and early twenty-first centuries and studies of that landscape.

2.1 Broadcasting and Public Service in Canada

As the original public service broadcaster, the BBC operates under a royal charter which obliges it “to inform, to educate and to entertain; to report the proceedings of Parliament; to provide a political balance” (Crisell 2002, 28). This broadly characterizes the purpose of public service broadcasting since its birth, including in Canada: to inform citizens of the activities of their government, to build social capital in one way or another and to treat the audience as a group of citizens. Kees Brants argues that the ideal PSB makes available what “the public needs in order to participate fully as democratic citizens” in public life (Brants 2003, 8). Though funded by the state (and therefore the public), public service broadcasting is more than just broadcasting funded by the public (Eaman 1992, 59). As Barnett and Docherty write, public service broadcasting is more about commitment to principles than ownership (Barnett and Docherty 1991, 24).

Barnett and Docherty also offer a useful theoretical framework for interpreting public service in broadcasting. Based on a report from the British Broadcasting Unit, they explicate eight criteria that an ideal PSB fulfils. The first is universal access to the broadcast, regardless of location (Barnett and Docherty 1991, 26-27). The second criteria is providing programming that appeals to the media preferences of the entire population (ibid., 27-28). The third criteria is universality of payment – that is, since the entire population can access
the PSB’s materials, the entire population ought to pay for it in some fashion, whether it be through license fee, government subsidy, or some other means (ibid., 29-30). Fourth, argue Barnett and Docherty, the ideal PSB is free from any sort of external interference, be it political or commercial, with its mandate or capacity to fulfil that mandate (ibid., 30-32). The fifth criteria for the ideal PSB is that it recognize its special mandate to provide coverage of national interests, events, and culture and thereby “foster a sense to national identity” (ibid., 32). The sixth criteria requires that a PSB be especially conscious of the interests and preferences of minorities, both ethnic and otherwise (ibid., 33-34). The seventh criteria contends that the ideal PSB must be allowed and encouraged to experiment with programming (ibid., 34-35). Finally, though the ideal PSB will compete with other broadcasters for excellence in programming, it should not, argue Barnett and Docherty, engage in an obsessive contest for the most viewers or listeners (ibid., 35-36).

These criteria provide a lens through which we may examine the work of other scholars studying PSBs. For example, Christopher Hanretty's method of analysing the de facto political independence of PSBs evaluates them on the basis of Barnett and Docherty's fourth criteria (Hanretty 2010). The CBC ranks below the BBC and the Australian Broadcasting Corporation (ABC), but above the PSBs of countries such as New Zealand, Spain, Portugal, France, and South Africa (ibid.). Irene Costera Meijer investigates potential tension between the first (universality of appeal) and seventh (competition for programming quality, not audience numbers) of Barnett and Docherty's criteria (Costera Meijer 2005). She argues that quality and popularity should be weighed equally as goals for PSBs (ibid., 47).

Christian Nissen studies one dimension of the fifth of Barnett and Docherty's criteria; that PSBs should foster a sense of national unity and identity. Using statistical data from the European Audiovisual Observatory, Nissen describes the programming profile of various television PSBs and commercial broadcasters in Europe (Nissen 2006, 78). He concludes that
European PSBs generally air more news and information-oriented programming than their private competitors, and presents this as evidence PSBs attempting to fulfill their broadcasting mandates (ibid., 78-79).

This fifth criteria is perhaps the most important to consider for Raboy, a leading critic of the CBC. Raboy contends in his comprehensive accounting of public service broadcasting in Canada that for most of its life the CBC has fused the ideas of public and state interests (Raboy 1990, 8). These interests, Raboy claims, generally fall into one of three categories: preventing Canada's conquest in whatever form by the United States, suppressing Quebec separatism, and protecting the market to allow commercial interests to flourish (ibid., 336). To achieve this, Raboy argues, the Canadian government routinely places financial and political pressure on the CBC, routes broadcasting through Ottawa and Toronto (ibid., 340), and, through the Canadian Radio-television and Telecommunications Commission (CRTC), resists proposals to set up alternative public broadcasters (ibid., 340). This results in a public service broadcasting system that treats its audience as a mass rather than as a public (ibid.) – that is, as a numerous, spread-out, anonymous collection of individuals with relatively little in common and no ability to organize or act, rather than as an active, organized body of citizens engaged in political discourse (McQuail 2000, 41-42).

Raboy lays out five requirements for improving public service broadcasting in Canada and moving towards treating audiences like publics. They include expanding the levels of government that influence PSBs, defining the question of cultural sovereignty in a broader context, and increasing public participation in public broadcasting (Raboy 1990, 355-356). The public interest, he argues, means allowing the different and conflicting publics that make up Canadian society to coexist equally and peacefully (ibid., 356). Public service broadcasting, by extension, would be broadcasting that furthers this goal, and this is currently repressed in Canada through the primacy of cultural sovereignty in Canadian PSBs (ibid.).
Raboy's critique of the CBC challenges the notion that it functions as a PSB in the true sense, and other scholars have criticized the CBC as an instrument of nationalism (e.g. Filion 1996, Ferguson 2007) or simply accepted that this is so (e.g. O'Neil 2006). While this study analyses the audience performance of the CBC and not the qualities of its programming or policies, it is still based on the assumption that understanding the leading PSB in Canada (i.e., the CBC) is important. It may well be the case that the CBC too often conflates the interests of the federal government with the interests of the public, but it remains the oldest national public broadcaster in Canada (CBC Annual Report 2006-2007, 17). Barring the creation of an entirely new government-funded national broadcaster, which seems unlikely given modern political attitudes toward funding the already-established one (e.g. ibid.), the CBC is the largest PSB in the country. Recent research from Finn, McFayden and Hoskins at the University of Alberta found that Canadians feel the CBC is worth the hundreds of millions of taxpayer dollars it receives each year (Finn, McFayden and Hoskins 2003, 190). Therefore, it remains a unique part of the Canadian media landscape and an important one to study.

Ferguson, surveying print media coverage of the 2005 CBC lockout, sees public service broadcasting in Canada as a stronghold of the democratic ideals of public participation and access (Ferguson 2007, 197). Programming produced and consumed by the public, Ferguson argues, would make public service broadcasting enrich Canadian society and public life, and make Canada more democratic (ibid.). However, she contends that the CBC's behaviour makes it de facto a tool of nationalism, albeit a democratic and representational nationalism (ibid.). Certainly, nationalism is abundant in some of the CBC's defence of itself (e.g., Basen 2003). Ferguson does not define the CBC solely as a means to defend national identity in Canada – rather, she argues that nationalism dominates other conventional PSB values like high journalistic standards and accessibility (ibid.). She ends
her study of the lockout by admonishing the CBC for its state-centric orientation and encouraging it to allow greater public participation in the future (ibid.).

Prang lays out a similar state-centric view of the CBC's function as Raboy. Government support for the creation of a national broadcaster (i.e., the CBC) grew out of concern for broadcasting's potential to blur the boundaries of national identity (Prang 1965, 3). This blurring made real the possibilities of American cultural annexation (ibid.) and Quebecois separatism (ibid., 10). Prang describes the CBC as the national government's answer to Graham Spry's famous statement that “the question is the State of the United States” (Spry, quoted in Prang 1965, 28). If Prang is right and public service broadcasting is first and foremost used by policy makers as a tool of national unity designed to prevent the northward cultural march of the United States, the validity of Raboy's critique seems given.

Eaman, a scholar at the Carleton University School of Journalism and Communication, analyses the CBC from the perspective of audience research. Using archival sources from the CBC's audience research department and interviews with CBC employees, he argues that response to audience preferences, as discerned through audience research, plays a vital role in public service broadcasting (Eaman 1994, ix). According to Eaman, the CBC generally fails to respond to audience preferences and tastes in a meaningful way in both radio and television (ibid., 226). He points out audience ratings in particular as misleading instruments in this regard, as they show simply what is being consumed, not what audience members want to consume or what they think of it; at their worst ratings are used to determine the staying power of content-production formulas in the market (ibid., 144). He proposes a new model of audience research for the CBC to embrace: public participation, wherein the Canadian public is allowed to set basic broadcasting priorities and goals which the CBC then strives to meet (ibid., 224-226).
Eaman holds ratings to be of low equality and moderate meaningfulness (ibid., 162) for PSBs because they don't in-and-of themselves indicate any substantive audience interaction with the programming and they favour heavy users over light users (ibid., 145-146). Accounting for competition's influence on market share makes partial redress of these problems, since it weights ratings against statistical expectations. That 4 in 10 people listen to a given radio station means less than the knowledge that 4 in 10 do so in a market where the average broadcaster is expected to garner 2 in 10. Since ratings compare media outlets of the same format, this can indicate more clearly that people may prefer Outlet A's content over Outlet B's – a meaningful distinction.

Competition between media outlets is different than competition between most other businesses (Picard 2002b, 139). This review now turns to an overview of the scholarly literature on competition between radio outlets in Canada.

2.2 Radio Competition in Canada

Media outlets do not compete with one another in the same way that other business do. As Picard states in The Economics and Financing of Media Companies, compared to beer producers, shoe retailers, detergent manufacturers or farmers, competition among media firms in the same format (e.g., newspapers) is notably lower because of relatively limited choice of outlets (ibid., 139). Substitutability between different formats of media outlets is comparatively limited (e.g., a television station and a radio station substitute less well for each other than a pizza and a hamburger) (ibid., 139-140). This further lessens competition between them (ibid., 139).

However, competition among media firms has increased globally in recent decades, and there is still high competition to hold market leader position (ibid.). Competition between media producers of the same format tends to be highest when the producers target the same
audiences in the same location (ibid., 151). Intramedia competition is generally stronger than intermedia competition (ibid., 150-152). Competition is highest in markets with many firms and low product differentiation and barriers to entry (ibid., 149). Picard argues that the more power a single firm holds in a media market, the worse that market will operate (ibid., 141).

Radio stations are not immune to this, but their competitive relationships can be distorted by government funding (Berry and Waldfogel 1999, 190). For example, Berry and Waldfogel, though regression modelling of market share with various sociological data, found that public funding of jazz and classical music stations in the United States crowded out private stations that would serve the same audiences (ibid., 210). They argue private stations would provision for jazz and classical music audiences in large markets in particular (ibid., 209), though they stop short of suggesting that public funding to stations of this kind in said markets should be reduced (ibid., 210). It is interesting to note that many studies of American radio find a healthy degree of competition between stations (e.g., Greve 1996, Compaine 1985).

This is not the case for Canada, where concerns about media ownership monopolies have persisted since at least 1977 (Beatty, 1977). Beatty, surveying the history of media ownership in Canada, highlighted the tendency of any Canadian media market, including radio markets, to tend towards fewer and fewer competitors over time because of mergers and acquisitions (ibid., 13). Beatty cites a theoretical example put forward by Leibling of a newspaper market with multiple firms (Leibling, quoted in Beatty, 1977, 13.). It is tremendously lucrative, he argues, for any firm that can afford the expenditure to buy out all others (even if this means paying much more than market value for them), since this will allow for monopolistic leverage (ibid.) and exorbitant future profits.

Beatty argues that Canada experiences increased concentration of ownership each successive year, and that this harms Canadian journalism and public life (Beatty 1977, 15).
For him, competition is necessary for the proper functioning of both media markets and Canadian democracy (ibid.). Surveying the Canadian media landscape in 1977, he saw a severe competition deficit (ibid., 20). However, he remains skeptical that unregulated private enterprise will produce the required level of competition, and he cites numerous failed policies attempting to promote competition and divergent media ownership (ibid., 11, 14, 17).

More recent scholarship on telecommunications competition in Canada also describes a competition deficit. Globerman, Janisch and Stanbury, reviewing the decision-making of the CRTC, found that it operated to promote cultural nationalism and diminish protectionist fears of American cultural invasion (Globerman, Janisch and Stanbury 1996, 156-157). They argue that Decision 94-19, which dealt with long-distance telephone service, is representative of the protectionist stance of the CRTC and the influence that established broadcasting interests and cultural nationalists have as a lobby over the CRTC (ibid., 157). They contrast this with the situation in the United States, which is more open to competition (ibid.). The CRTC, they say, rejects basic economic advice for increasing the competition in an industry: “reduce barriers to entry to the greatest extent possible” (ibid.).

According to George, convergence – the merger and acquisition of firms in the telecommunications industry to create fewer and fewer players in a given market – peaked in Canada in the 1990s (George 2010, 556). This happened because the federal government and the CRTC liberalized broadcasting and telecommunications laws to allow for greater concentration of ownership (ibid., 557). This process continues across print, radio and television to this day, he argues (ibid.). George cites the 2007 purchase of the CHUM network (including its 33 radio stations) by CTVglobemedia as a more recent example of this (ibid.). He also argues that conglomerates like Rogers and CTVglobemedia make it increasingly difficult for new telecommunications firms to enter Canadian markets (ibid.,
George contends that the Quebec broadcast media landscape is the least competitive in the country (ibid). This concentration of ownership is potentially troubling, according to George. Concentration of media ownership can inhibit public discourse and media pluralism, partly because information professionals (e.g. journalists) tend to have limited employment choices (ibid.).

Some scholars place the height of convergence at a different time. Winseck argues that concentration of ownership in broadcast media may be more acute now than at any time in the last 15 years (Winseck 2010, 365), while Finn, McFayden and Hoskins hold that it peaked in the 80s (Finn, McFayden and Hoskins 1994). They approach the question of increased competition from a strategic perspective, reasoning that greater competition, which they associate with increased market convergence, demands more market-driven thinking from producers of cultural content (ibid.). Smaller producers, they hold, are at a competitive disadvantage compared to large (typically American) producers (ibid.).

In radio, this effect is known as double jeopardy (Ehrenberg, Goodhart and Barwise 1990). McDowell and Dick define the double jeopardy effect as the tendency of less popular competitors in a market to accrue less customer loyalty per capita, while, conversely, more popular competitors accrue more customer loyalty than average (McDowell and Dick 2005, 272). Through the use of Arbitron quarter-hour listening diaries, they found modest evidence of the double jeopardy effect in the 100 most lucrative radio markets in the United States in 2002, though their analysis ignored non-commercial stations (ibid., 281, 278).

If Winseck is right and convergence of media ownership is greater than ever in Canada (Winseck 2010, 365), new radio stations could suffer more from double jeopardy in Canada. He identifies ten media conglomerates that he argues control the majority of broadcasting and news in Canada: Shaw, Quebecor, Bell, Canwest, Astral Media, Torstar, Rogers, CTVglobemedia, Cogeco and CBC (Winseck 2010, 366).
financial records, he highlights two periods of marked conglomerate growth, the first from 1996-2000 and the second from 2003-2007 (ibid., 377). Winseck also deploys several competition metrics to assess how concentrated ownership of the Canadian media landscape really is for different formats. Competition ratios suggest that radio is less concentrated than newspapers or TV, but that it experienced a marked increase in concentration from the mid-90s to roughly 2002 (ibid., 378). Herfindahl-Hirschman Index (HHI) scores, produced by squaring a firm's market share and then totalling all the squares to make a score between 100 (100 competitors with one percent market share) and 10,000 (one competitor with an absolute monopoly) suggest that radio ownership is slightly concentrated, though less so than television and newspapers (ibid., 379). Ultimately, he argues, this presents concerns for the health of media in Canada and therefore Canadian democracy (ibid., 388).

McDowell and Dick also offer a conventional definition of audience share, which might be thought of as equivalent to market share for a broadcaster: they define audience share as the fraction of audience members tuned in to a given outlet or program divided by the total number of audience members (McDowell and Dick 2005, 272). But unaltered audience share is not as helpful as it could be in this regard, as it does not account for the degree of competition in a market. Addressing this problem with respect to CBC Radio's audience share in a small way is the aim of this research. The methods employed to do so will be discussed in the following section.
Chapter 3: Methodology

3.1 Research Approach

This study is quantitative and examines the audience share of CBC Radio on a province-by-province basis across Canada against statistical expectations of average radio station performance, using a technique pioneered by Robert Picard in 2002. While qualitative methods like content analysis and in-depth interviews are appropriate for many aspects of mass media study, they are less useful for the objective of my research. Contributing towards a more accurate understanding of CBC Radio's market share across Canada demands the macroscopic perspective and precise language that numerical data and quantitative research provides. This study adopts two of the goals of audience research described by McQuail: assessing media performance and fulfilling obligations to serve a given audience (McQuail 2004, 365).

Quantitative methods have a long history in communications research, where they contribute to the eventual formation of theory and causal explanations of the role of media in society (Gunter 2002, 209). Though proposing causal connections is beyond the scope of this study, it will still engage in their foundational enterprise: hypothesis proposal and testing (ibid.). This testing is done through statistical analysis of data acquired Statistics Canada, the Bureau of Broadcast Measurement (BBM), and the Canadian Communications Foundation.

3.2 Research Question

An overview of the scholarly literature studying public-service broadcasting and audience performance has informed the research question this study seeks to answer: How
does CBC Radio's measured audience performance compare with statistical expectations across Canada on a province-by-province basis from 1999-2007?

3.3 Picard's Approach To Audience Performance

This study's methodology is largely based on a technique first published by Robert Picard in 2002. Analyzing the audience performance of a variety of European television PSBs in the year 2000, Picard generated a measurement of a given PSB as follows:

\[ CMS - EAAS = \text{Channel Performance} \]

CMS stands for channel market share and EAAS stands for expected average market share (Picard 2002a, 231). For the purposes of this study, CMS will translate to station market share, or SMS. Based on the number of television channels in a given media market, EAAS represents statistical expectations of market share percentage. Picard calculated each EAAS value by dividing the number of channels in a market into 100 (ibid.). The equation produces a numerical score that represents a station's performance weighted against expectations of an average broadcaster in that station's market called the channel performance, or CP. A positive CP score represents performance above expectations while a negative score represents performance below expectations. Picard's technique is useful because it allows one to make more accurate comparisons of broadcaster performance across time and space, which can change a station's number of competitors and, therefore its EAAS value. For the purposes of this study, CP will be changed to station performance, or SP.

To adapt Picard's method for this study, some tweaks were necessary. First, the available market share data relates to CBC Radio's performance at a provincial level, and multiple CBC stations exist in every province, often in the same market. To compensate, the
EAAS for a station in a given province and year was multiplied by the number of CBC stations in that province and year to produce an EAAS value for every CBC station in the province at the time.

This change assumes a high degree of intra-CBC competition, producing demanding aggregate EAAS values for CBC Radio in each province. In his study, Picard takes a different approach and treats multiple channels operated by a PSB in a given market as one channel for the purposes of assessing PSB performance (Picard 2002, 231). This better reflects the fact that PSBs design different channels or stations in the same market to appeal to different segments of an audience. In the case of CBC Radio, we might think of Radio One and Radio Two, or of Première Chaîne and Espace Musique as examples of this strategy. Clearly, English-language news and general interest programming (i.e., Radio One) and French-language music (i.e., Espace Musique) target different audiences and thus avoid competing with each other to the same extent that two radio stations of very similar type would. Collapsing all of a PSB’s outlets in a given market into one channel better reflects this.

Yet some degree of competition exists between all outlets in a given market. One can, after all, only listen to one radio station at a time. To compensate for this, the data analysis was performed with both the more-competition and less-competition approaches and the results will be presented in tandem. The SP scores for the More Competition Model (MCM) are calculated as follows:

\[
\text{Total CBC Market Share} - (\text{EAAS} \times \text{Number of CBC Stations in Market}) = SP
\]
These scores are premised on expectations of at least average market-share performance from each CBC station in a market – a demanding assumption that produces lower SP scores than the Less Competition Model (LCM). LCM scores are calculated as follows:

\[
Total \text{ CBC Market Share} - \text{EAAS} = SP
\]

This equation treats all CBC Radio stations in a market as one outlet. In other words, average market performance in the LCM (i.e., \(SP = 0\)) represents equivalency between a market’s EAAS value for one station and the combined market share of all CBC stations in that market. LCM scores are higher than MCM scores, and the actual performance of CBC Radio likely lies somewhere in between. Without some measure of competition between CBC Radio stations in a given market, the range of SP scores unfortunately cannot be resolved further. However, the LCM and MCM scores combined still form a useful metric, presenting, respectively, a best- and worst-case scenario for CBC Radio's performance.

### 3.4 Hypothesis

Given government's resistance to establishing non-CBC PSBs in Canada (Raboy 1990, 340) and the hundreds of millions of dollars the CBC receives each year in government funding (Finn, McFayden and Hoskins 2003, 177), I hypothesize that CBC Radio performs above expectations in general, producing a positive SP score in each province and year examined in this study.

### 3.5 Data Collection

The majority of the data in this study comes from a radio listening databank released by Statistics Canada on September 18, 2008 (Statistics Canada 2008). The data set contains
market share information for all CBC stations in all 10 Canadian provinces from 1999-2007. This is the most recent period of data released through Statistics Canada.

The data were collected by BBM in the following fashion: the ten provinces of Canada were divided into 400 non-overlapping cells whose boundaries generally follow borders previously defined by Statistics Canada, such as counties or census agglomerations (ibid.). BBM then generated the sample size for each cell required to return statistically significant data from the survey based on population estimates (ibid.). Each cell's previous response rate to past surveys determined the number of diary packages needed to achieve the required sample size of each cell (ibid.). Using computerized telephone listings and manually chosen telephone directories, BBM then compiled a listings database from which a stratified sample was taken. Then BBM's Enumeration division used computer-assisted telephone interviewing to recruit sampled households to participate in the survey (ibid.). 40.2% of the sampled households agreed to participate.

These households were mailed listening diaries for each household member 12 years of age or older (ibid.). Survey participants used these diaries to document their radio listening habits over a designated survey week in quarter-hour intervals (ibid.). The survey weeks used were always in the fall months (ibid.). Once completed, the diaries were mailed back to BBM, where they were sorted, screened and amalgamated into the results eventually published by StatsCan.

This sample frame excludes some Canadians from the sample population. Excluded groups include residents of the Yukon, Northwest Territories, Nunavut, Indian Reserves, institutions such as prisons and hospitals, households where no member speaks English or French, and individuals without telephone service (ibid.). Since BBM is Canada's only national radio ratings measurement firm, these limitations must be accepted in order to continue the present study.
To determine the number of radio stations in each province for each year, I conducted a comprehensive tally through the Canadian Communication Foundation's directory of station listings. The Foundation, a registered charitable organization established by the Canadian Association of Broadcasters in 1967, maintains an authoritative directory of Canadian radio stations, including CBC stations, from the advent of broadcasting in Canada until the present day. I counted the stations in each province, accounting for closures and openings, for each year from 1999-2007 to generate the EAAS values used in this study. The directory can be viewed through www.broadcasting-history.ca.

The statistical analysis and graphing in this study were done with a combination of OpenOffice and R.
Chapter 4: Findings

4.1 Canada

The utility of Picard's approach to understanding the performance of CBC Radio is illustrated by comparing the following two graphs. Figure 4.1 is a histogram of CBC Radio's national audience share over the time period under study. The graph's mean is 10.78%, with a standard distribution of .97, a minimum of 9%, in 2005, and a maximum of 12%, in 2007.

A graph like this is less meaningful than one that compares actual performance against statistical expectations of performance. Accounting for the number of radio stations in all ten
provinces makes possible the generation of Figure 4.2, which depicts a very different picture of CBC Radio’s national performance.

The MCM scores, represented by the lower line, have a standard deviation of 1.50, a minimum of -1.35 (1999) and a maximum of 3.41 (2007). Overall, CBC Radio goes from performing below statistical expectations in this model to performing above them during the period under examination. However, the progression is not uniform, with the notable exception of a reversal in 2005, when the national SP score drops to -0.86. The SP scores have a mean of 0.61, suggesting that overall CBC Radio performs slightly above statistical expectations during the period being studied.

The LCM scores show similar trends, peaking in 2007 with a score of 12.29 and bottoming out at 8.68 in 2005. The LCM scores have a standard deviation of 1.04 and a mean
of 10.6, suggesting performance above expectations. When looking at the SP scores for the entire country, the LCM is likely more meaningful than the MCM. Radio stations in other provinces do not compete with each other to the same extent as radio stations within the same province, so a model that discounts the effects of competition is likely more accurate than one that incorporates it like the MCM.

There were 75 CBC stations across the provinces in 1999 and 79 in 2007.

### 4.2 Alberta

![CBC Radio Performance in Alberta](image)

As shown in Figure 4.3, CBC Radio's performance in Alberta differs from the national picture in several notable ways.
The MCM SP scores in the figure are all positive except for 2005. The scores also generally decline until 2006, which has the second-highest MCM SP score, 2.08, of any MCM score on the chart. The scores are have lower spread than the national SP scores for CBC Radio, with a standard deviation of 0.88, a minimum of -0.17 (in 2005) and a maximum of 2.39 (in 2007). Though CBC Radio in Alberta produced positive SP scores over a period of negative SP scores for CBC Radio as a whole (1999 and 2000), Alberta's mean MCM SP score of 1.16 suggests that CBC Radio there performs at least slightly above statistical expectations for the period under study.

The LCM scores, with a mean of 6.87 and a standard deviation of 0.65, suggest performance above expectations. They also move differently than the MCM scores, peaking in 2000 at 7.38 and declining slightly from 2006 (7.35) to 2007 (7.07). The minimum score of 5.39 is still earned in 2005, however.

There were 5 CBC Radio stations in Alberta from 1999 until 2001, and 6 thereafter.

4.3 British Columbia

Figure 4.4 shows that the SP scores of CBC Radio in BC are significantly higher than national averages from the period under study.

CBC Radio in BC produces such high MCM SP scores that its smallest score, 5.3 in 2005, is 1.55 times that of the highest of the national average scores, 3.41 in 2007. Figure 4.4 has relatively low spread, with a standard distribution of 1.93 under the MCM and 1.83 under the LCM. The maximum SP score under both models occurs in 2006 (11.04 for the MCM and 16.78 for the LCM). The mean MCM SP score is 8.71; over 14 times that of the equivalent national 0.61. Comparing LCM makes British Columbia's scores look slightly less impressive, though the mean of 14.74 is still higher than the national LCM SP mean of 10.6.
It is interesting to note that, though CBC Radio in BC still maintains comparatively high SP scores of 5.3 (MCM) and 11.34 (LCM) in the year 2005, that particular year still produces the lowest score of any in the present study. Also, unlike the national mean SP scores, which peak in 2007, CBC Radio in BC peaks in 2006 in both LCM and MCM scores. Overall, this approach suggests that CBC Radio in BC exceeds statistical expectations by a considerable margin.

![CBC Radio Performance in British Columbia](image)

**Figure 4.4**

There were 7 CBC Radio stations in BC from 1999 to 2001, and 8 thereafter.

### 4.4 Manitoba

Figure 4.5 demonstrates that CBC Radio in Manitoba may have performed below statistical expectations in the period under study.
Manitoba's MCM SP scores have a minimum of -4.2, for 2005, and a maximum of -0.03, seen in both 2006 and 2007. The scores have a standard distribution of 1.3 and a mean value of -1.70, which is below the national MCM mean of 0.61. It is interesting to note that CBC Radio in Manitoba garnered its lowest MCM SP score in 2005, while most other provinces (as well as the national averages) garner their lowest scores in 1999. Manitoba does match the general trend of strong performance in 2006 and 2007, however, with its highest scores earned in those years.

![CBC Radio Performance in Manitoba](image)

**Figure 4.5**

The LCM SP scores generally follow the same patterns, though of course at higher values. The scores have a mean of 7.93 and a standard deviation of 1.24. The maximum score
of 9.27 occurs in both 2006 and 2007. The lowest value of 5.32 occurs in 2005, and scores generally increase in the period under examination, growing from 7.27 in 1999 to the maximum scores in 2006 and 2007.

There were 4 CBC Radio stations in Manitoba in 1999 and 2000, and 5 from 2001 until 2007.

4.5 New Brunswick

![CBC Radio Performance in New Brunswick](image)

Figure 4.6 shows the SP scores of CBC Radio in New Brunswick from 1999 to 2007. Like the national MCM SP scores, the lowest score in New Brunswick happens in 1999. However, New Brunswick's score of -3.98 in that year is lower than the national score (-
1.35). The following year scores considerably better (though still below expectations) with a score of -1.15. Indeed, yearly MCM SP scores increase until 2002, where they reach 1.75. CBC Radio in New Brunswick generates positive MCM SP scores in 2004, 2006 and 2007, but, like the national scores, a negative score is observed in 2005: -1.84, in this case, again lower than the national score in the same year (-0.86). This changing from positive to negative MCM SP scores is frequent compared with the other provinces and the MCM SP scores of CBC Radio across the whole of Canada. The MCM SP scores have a maximum of 2.07 (2004), a minimum of -3.98 (1999), and a standard deviation of 2.09. Their mean is 0.05.

The LCM SP scores do not show the same growth as the MCM SP scores between 1999 and 2002, but they do generally indicate performance above expectations, with a mean of 11.81. The scores have a minimum of 8.36, earned in 2005 like most minimum SP scores in this study. The maximum value of 13.56 comes in 2000. The LCM SP scores have a standard distribution of 1.62.

Overall, the MCM and LCM SP scores suggest that CBC Radio in New Brunswick performance generally exceeded expectations between 1999 and 2007.

There were six CBC Radio stations in New Brunswick during the period under study.

4.6 Newfoundland and Labrador

Figure 4.7 shows that CBC Radio Newfoundland and Labrador garnered negative MCM SP scores for the whole period examined in the present study. The scores follow the general trend of low values in 1999 and 2005, with scores of -13.24 and -17.83 in those respective years. It is interesting to note that, unlike the national scores, those of CBC Radio in Newfoundland and Labrador show relatively little increase between 1999 and 2007, starting at -13.24 and finishing at -11.73. This represents a change in SP score of 1.51, which
is 31.6 percent of the difference in the national scores of the same period (CBC Radio's national MCM SP score increases by 4.76 between 1999 and 2007). Overall, the scores have a minimum of -17.83 (in 2005), a maximum -10.24 (in 2001), a standard distribution of 2.3. The mean MCM SP score of -12.54 suggests that CBC Radio in Newfoundland and Labrador performs below statistical expectations in the period studied.

The LCM SP scores move in a similar pattern, though at higher values. They have a mean of 7.86, a maximum of 10.45 (2001), a minimum of 2.17 (2005), and a standard distribution of 2.55. This suggests performance above expectations, albeit by a smaller margin than most other provinces.
Since the LCM and MCM scores together describe the possible range of CBC Radio's performance against statistical expectations, the scores in Figure 4.7 present the possibility that CBC Radio is performing above or below expectations in Newfoundland and Labrador. The true performance likely lies somewhere between the two bounds, suggesting performance marginally above or below expectations.

There were seven CBC Radio stations in Newfoundland and Labrador between 1999 and 2007.

4.7 Nova Scotia

As Figure 4.8 shows, CBC Radio in Nova Scotia garnered positive MCM SP scores between 1999 and 2007 with the exception of 2005. The scores have a minimum of -1.61 (in 2005), a maximum of 3.74 (in 2006), and a standard distribution of 1.67. The scores also decrease relatively drastically from 2006 to 2007, going from 3.74 to 1.28 – not much higher than the 1999 SP score of 1.18. This is atypical compared to other MCM SP scores at both the provincial and especially national level, where it grows from 2.24 to 3.41 in the same period. Overall, the mean MCM score of 1.69 suggests that CBC Radio in Nova Scotia performs above expectations for the period examined in the present study. Since this score represents a worst-case scenario, it seems likely that CBC Radio in Nova Scotia performs above expectations on average.

The LCM SP scores, unsurprisingly, follow a similar pattern with higher values. The LCM SP standard distribution is 1.92, while the maximum score of 10.45 occurs in 2001. The minimum LCM SP score of 9.2 occurs in the same year as the minimum MCM score, 2005. The LCM SP mean of 13.26 suggests performance above expectations.

There were five CBC Radio stations in Nova Scotia between 1999 and 2007.
4.8 Ontario

As Figure 4.9 shows, Ontario garnered positive MCM SP scores in every year examined in the present study. The MCM SP scores also generally increase, with the second lowest score of 1.42 occurring in 1999 and the maximum score of 5.22 coming in 2007. This latter score is 3.68 times the size of the former. The minimum score, 0.35, was garnered in 2005. The scores have a standard distribution of 1.39 and a mean of 2.79. These scores suggest that CBC Radio in Ontario performed above statistical expectations between 1999 and 2007.
The LCM SP scores suggest performance above expectations by a greater margin. The maximum score of 10.43 occurs in 2007, the minimum of 6.20 in 2005. The scores have a standard distribution of 1.17 and a mean of 8.85. The positive means of both the LCM and MCM SP scores suggests that CBC Radio in Ontario performed above on average expectations during the period under study.

There were 15 CBC Radio stations in Ontario during the period examined.

4.9 Prince Edward Island

As Figure 4.10 shows, CBC Radio in Prince Edward Island garnered negative MCM SP scores in every year examined in this study. The minimum score is -23.73, coming in
2005, and the maximum is -8.23, garnered in 2006 – interestingly, one year after the minimum score. The SP scores also increase overall by 5.06, from -16.23 in 1999 to -11.17 in 2007. CBC Radio's SP scores in Prince Edward Island have a standard distribution of 4.92, the largest of any of the provinces. The mean MCM SP score of -15.09 is the lowest of any province.

The mean LCM SP score of 1.04 is also the lowest of any province. Prince Edward Island's LCM SP scores also have a comparatively large spread, with a standard distribution of 4.91. The lowest score of -7.07 occurs in 2005, while the maximum score of 8.43 in 2000. Negative scores are earned in 2001, 2005 and 2006.

Since LCM SP scores represent a best-case scenario of performance, these scores suggest that CBC Radio in Prince Edward Island performed below expectations in 2001,
2005 and 2006, and may have performed below expectations in other years as well (e.g., 1999 has an LCM SP score of 0.43).

There were 2 CBC Radio stations in Prince Edward Island between 1999 and 2007.

4.10 Quebec

Figure 4.11 demonstrates that CBC Radio's MCM SP scores in Quebec go from negative to positive the time period studied. The minimum score, -3.19, occurs in 1999, while the maximum score of 4.50 occurs in 2007. With the exception of 2004, when the score remained the same as the previous year at 0.49, MCM SP scores increase every year – even in 2005, when the MC SP score of every other province's CBC Radio stations decreased. The scores have a standard distribution of 2.57.

The LCM SP scores show the now-familiar similar patterns at higher values. The scores have a mean of 9.83, a standard distribution of 2.29, a maximum of 13.88 and a minimum of 6.88. The maximum and minimum scores occur in the same years as the equivalent MCM SP scores, 2007 and 1999, respectively.

As will be discussed later in this study, the SP scores of CBC Radio in Quebec in 2005 is somewhat unusual. The scores of CBC Radio in every other province went down in that year. One explanation that immediately suggests itself is that the higher number of French-language (Radio-Canada) stations in Quebec compared with the rest of Canada might have played a role. It may well be that French-speaking audiences behave differently than English-speaking ones in this context. Future audience research might investigate the possibility. Another explanation is that English-speaking programming changed in some fashion detrimental to maintaining market-share. A carefully-done content analysis could test such a hypothesis. Another possible cause might involve the labour dispute of 2005, which saw most CBC employees outside of Quebec cease work for seven weeks and one day...
(Ferguson 2007, 182). It is beyond the scope of the present study to investigate the resiliency of CBC Radio in Quebec in 2005, but it certainly warrants future research.

It is interesting to note that CBC Radio in Quebec's mean MCM SP score is nonetheless still negative, at -0.26. This suggests that overall, CBC Radio in Quebec may have performed below statistical expectations during some of the years examined by the present study.

There were 15 CBC Radio stations in Quebec in 1999 and 2000, and 16 from 2001 onwards.

![CBC Radio Performance In Quebec](image.jpg)

**Figure 4.11**
4.11 Saskatchewan

Figure 4.12 illustrates that CBC Radio generally garnered positive MCM SP scores between 1999 and 2007. Figure 4.12’s minimum MC SP score and only negative value, -1.00, comes in 2005. The maximum of 2.79 occurs in 2007. Saskatchewan's MCM SP scores have a standard distribution of 1.05, the second smallest standard distribution of any province in this study. The mean MCM SP score of Figure 4.12 is 1.03. The LCM SP scores have a mean of 8.32 and a standard distribution of 1.24. The maximum score of 9.47 comes in 1999, while the minimum of 5.53 comes in 2005.

CBC Radio Performance in Saskatchewan

![CBC Radio Performance in Saskatchewan](image)

Figure 4.12
Overall, this suggests that CBC Radio in Saskatchewan performed above statistical expectations between 1999 and 2007.

There were 4 CBC Radio stations in Saskatchewan between 1999 and 2007.
Chapter 5: Conclusion

The results of this study shed some interesting light on CBC Radio's performance across Canada between 1999 and 2007. The findings suggest that CBC Radio performance against statistical expectations varies significantly between provinces and over time. The national mean MCM SP score of 0.61 suggests that CBC Radio generally performs at least slightly above expectations, while the LCM mean of 10.6 suggests it does so by a significantly wider margin. However, this macroscopic view of MCM scores resolves to a somewhat different outlook when one moves past the national perspective to examine the provinces, as Figure 5.1 illustrates.

![CBC Radio Provincial MCM Scores](image)

Figure 5.1
The two lines along the bottom are Prince Edward Island and Newfoundland, while the line along the top is British Columbia. The seven other provinces cluster in the middle, generally between -5 and 5.

Between the seven middle provinces, the range between the MCM scores is biggest in 2001, at 6.08, and smallest in 2006, at 3.99. Their collective mean increases year-over-year from 1999 to 2007, with the exception of 2005, where it dips from its preceding score of 1.26 to -1.05. Ontario has the highest score in every year except 2002, when Nova Scotia leads with 3.55, and 2005, when Quebec leads with 1.14.
The MCM SP scores, examined in isolation, suggest that CBC Radio in Prince Edward Island and Newfoundland perform markedly worse than in the rest of the country, while its performance in British Columbia exceeds expectations by a considerable margin. The LCM SP scores viewed together produce a different picture, as illustrated by Figure 5.2.

Figure 5.2 has the same legend as Figure 5.1 – Prince Edward Island's scores form the green line along the bottom, while British Columbia's form the orange line along the top. It is interesting to compare the position of Nova Scotia's scores, represented by the navy line, in Figure 5.1 and Figure 5.2. While its MCM SP scores place it with those of most other provinces, its LCM SP scores are the highest in the period studied in 1999 (13.68), 2000 (14.68) and 2002 (15.67). Newfoundland's scores, represented by the yellow line, jump into the middle of the pack. Though Prince Edward Island's scores remain markedly more
negative than the other provinces (excepting 2004, when it peaks at 8.43), the LCM SP scores overall have a smaller spread than MCM SP scores, as indicated by their smaller average range (10.86 to 14.12).

Given the differences between the two sets of scores, it is useful to examine the picture produced by their means. Figure 5.3 does this.

Figure 5.3 presents a more coherent picture of CBC Radio's performance, though a less reliable one. It represents the mean of the MCM and LCM SP scores. British Columbia's scores remain the highest while Prince Edward Island and Newfoundland's scores are still the lowest, but by smaller margins than in the MCM graphs. The combined scores have a mean
of 3.82, a maximum of 13.91 (British Columbia in 2006) and a minimum of -15.4 (Prince Edward Island in 2005).

Figure 5.3 represents the middle ground between the upper and lower bounds on CBC Radio's performance established by the MCM and LCM scores. There is no greater likelihood of the Corporation's actual performance corresponding to these values than to the MCM or LCM scores, or any other value between them. It is important to keep this in mind when looking at the means. They are a useful illustration of CBC Radio's performance, but by no means are they authoritative.

Beyond comparing SP scores across geography, it is interesting to examine the scores on a chronological basis.

5.1 The Influence of 2005

The year 2005 saw a dip in SP scores for CBC Radio in every province across the country, with the exception of Quebec. The national aggregate MCM mean fell 1.88, from 1.02 in 2004 to -0.86 in 2005. The LCM mean dropped 2.29 to 8.68 in 2005 – the only year-over-year decrease between 1999 and 2007 excepting the 0.10 contraction seen between 2003 and 2004. Prince Edward Island suffered by far the biggest decreases. Its MCM SP score fell from -8.23 in 2004 to -1.61 in 2005, while its LCM score dropped from 8.43 to -7.07. British Columbia and Nova Scotia also suffered relatively drastic reductions of 4.59 and 4.43, respectively, in their MCM scores. Nova Scotia, New Brunswick and Newfoundland's LCM scores all dipped by approximately 5. The mean reduction among provinces was 4.13 and 4.42 for MCM and LCM scores, respectively. Only Quebec managed to increase its scores, going from 0.49 to 1.14 in MCM and 10.95 to 11.25 in LCM from 2004 to 2005.

The influence of this unusual year is demonstrated in Figure 5.4 and Figure 5.5.
Ignoring 2005, as Figure 5.5 does, makes CBC Radio's national performance look more linear. It also improves the overall performance of CBC Radio nationally, bumping the MCM SP mean up to 0.79 from 0.61 and the LCM SP mean from 10.60 to 10.84.

The reasons for this decline in 2005 are not immediately apparent. While some 32 new radio stations began broadcasting in 2005, increased competition seems an unlikely explanation, given that new stations opened up throughout the period under examination at an average of 25 per year. 32 is above this average, it is true, but the largest year-on-year increase of 35 occurs from 2006 to 2007, and in that period CBC Radio's national SP scores go up by 1.17 (MCM) and 0.80 (LCM) in that same time. Further, no CBC stations opened or closed in Canada from from 2003 to 2007. Providing causal explanations is beyond the scope
of the present study, but the question of what happened to CBC Radio in 2005 is an
interesting one that warrants further study.

One possible explanation lies in the CBC labour disputes in August of that year. Thousands of CBC employees, including almost the entire production staff of every radio and television program outside of Moncton, New Brunswick and the province of Quebec, went on strike for almost two months (Ferguson 2007, 181-182). The lockout inspired spirited debate about public service broadcasting in Canada (see Ferguson 2007), but the lack of new programming produced by the CBC may have sent its audience elsewhere. That the lockout overlapped with the sampling period used by BBM to collect that data this study makes use of (see section 3.5) may have exacerbated the decline in SP scores.

![National Performance of CBC Radio
2005 Removed](image)

**Figure 5.5**

On the other hand, this study only examines CBC Radio's audience performance, not what it actually broadcasts. Quality of programming presumably carries some weight in
determining a broadcaster's market-share. One might examine CBC Radio's programming to
determine if it changed in some substantive fashion in 2005. Conversely, it may be that
audience tastes and expectations changed in that year and CBC Radio's programming did not.
Future research could investigate these hypotheses to further our understanding the CBC and
media markets more generally.

5.2 The Scores In Context

Since assessing a media outlet's performance using the method developed by Picard
and deployed in this study is a comparatively new way of measuring media function,
comparing the SP scores generated in this study to those of other research papers is difficult.
Still, one of the advantages of Picard's approach is that the scores it generates provide some
insight in and of themselves. SP scores are, to an extent, meaningful on their own.

The MCM and LCM SP scores for CBC Radio between 1999 and 2007 paint a
variable picture of the state of the Corporation's health across Canada during this period.
CBC Radio stations in British Columbia outperform stations elsewhere by a significant
margin. In contrast, the stations in Prince Edward Island perform below those in other
provinces by a substantial margin. As illustrated by Figure 5.2, the stations in the other seven
provinces generate scores much closer together, with a maximum of MCM SP of 5.22
(Ontario in 2007), a minimum of -4.2 (Manitoba in 2005) and a mean of 0.68. The LCM SP
scores peak at 16.78 in British Columbia in 2007 while their minimum comes from Prince
Edward Island in 2005 (-7.07).

MCM SP scores in 2007 generally suggest an upward trend in the more recent years
covered in the present study. Exceptions to this are Saskatchewan and New Brunswick,
where scores decreased, and Manitoba, where the score remained the same as the previous
year. The mean MCM SP score for all 10 provinces certainly suggests an upward trend in the
last three years of the examined period, rising from -0.86 in 2005 to 2.24 in 2006 and 3.41 in 2007 (see Figure 4.1).

The LCM SP scores for the last three years of the study suggest less coherent movement. Prince Edward Island's scores improve, jumping from -7.07 in 2005 to -2.69 in 2006 to 3.11 in 2007. Scores in Quebec, Ontario, New Brunswick and Newfoundland also show consistent growth from 2005 to 2007. Saskatchewan, in contrast, has variable scores, growing from 5.53 in 2005 to 9.17 in 2006, but then shrinking to 7.47 in 2007. Still, average change from 2006 to 2007, is 0.59 – a positive value, possibly indicating future growth. New research done with more recent market share data and radio station counts would be able to speak more to the duration and extent of a potential upward swing in SP scores for CBC Radio.

Further research could also be done to better explain the unusual performance of CBC Radio in Prince Edward Island over the period studied here. As previously noted, CBC Radio there performs notably worse than it does compared to other provinces or to Canada as a whole. Perhaps this is attributable to the relatively small number of total stations in the province – there were six until 2005 when the total changed to seven. The average number of stations per province in a given year for this study is 76.9, and the province with the least stations outside of Prince Edward Island is Newfoundland and Labrador, which had 30 in 2007. Or, alternately, perhaps the population demographics of the Island are different from those of the other provinces in some fashion. It is also possible that CBC Radio might have trouble attracting the same quality of personnel to work for it there. These are tentative hypotheses that could be tested with more research to explain the sub-standard performance of CBC Radio in Prince Edward Island between 1999 and 2007.

The national mean MCM score of 0.61 does suggest that this study's hypothesis that CBC Radio's performance would exceed expectations by a substantial margin is disproved.
MCM scores represent a lower bound of sorts on possible performance; it is entirely possible
that a given station or group of stations performs at their MCM SP scores. Therefore, the
national MCM mean of 0.61 means that this study's hypothesis (that CBC Radio performed
above expectations by a wide margin in every year) is rejected.

One avenue of comparison for this study's results that suggests itself is Picard's
original study. Examining market data from 1999, a time of increasing competition in
broadcasting (Picard 2002a, 227), Picard found European television PSBs produced a wide
value of Channel Performance scores, from the mid-30 scores of Denmark and Germany to
Belgium's -11.4 (ibid., 233). The scores have a mean of 18.45 when certain overlapping
values are removed (e.g. the score for Ireland that ignores the role of PSB from the United
Kingdom) (calculated from ibid.). Picard also provides table of market position, illustrating
that all but two of the PSBs he studies lead their markets (ibid., 234).

The performance of CBC Radio as measured in this study does not quite measure up
with Picard's results. Comparing his scores with the LCM scores generated in this study
makes sense because they are generated with the same calculations. The national mean LCM
score (10.60) is 7.85 points below the mean for European PSBs, though CBC's lowest score
(-7.07, earned by Prince Edward Island in 2005) is 4.33 points higher than the minimum
score in Picard's study (-11.4, earned by Belgian PSBs operating in France) (ibid., 233). This
suggests that CBC Radio is performing at a lower level than European PSBs, and may need
to consider methods of improving its market share. Explaining this difference could be done
by future research. The histories and ages of the two industries may mean that radio is more
mature and competitive, or that radio audiences behave differently than television ones.
There might be a qualitative difference between the content produced by the various
broadcasters in question that could help explain the differences. Or perhaps the broadcast
content is largely similar and the audiences tastes differ. Alternately, the non-PSB stations in
the European markets may be less competitive with PSBs than their radio equivalents are in Canada. More research could further compare the Canadian and European media markets to better describe and understand where they overlap, as well as how and where they differ.

The conclusion that CBC Radio is performing at a lower level than European PSBs rests on the assumption that this study presents an accurate performance of CBC Radio between 1999 and 2007. Future research could focus on establishing this with more rigor and certainty in a number of ways. First, more recent market share and radio station count data could be used to examine the performance of CBC Radio in the years since 2007. Studying past periods would also be useful for providing a sense of context and history for CBC Radio's performance. Both types of research could also be done in a more chronologically detailed way, such as examining performance on a month-by-month basis (though this would require more frequent, and thus more expensive and time-consuming, audience surveys). Second, the geographic parsing of results employed in this study could be further broken down. Examining CBC Radio's performance on a city-by-city basis, or, ideally, a station-by-station basis, would provide further findings of interest and a more nuanced portrait of the Corporation's overall performance.

5.3 Interpreting the Findings

This research sheds some light on CBC Radio's performance in recent years, and attempts to address a small part of a research gap in Canadian communication literature. The theoretical framework outlined earlier in this study helps make further sense of the numbers produced by this study's quantitative analysis. CBC Radio's national MCM SP mean score of 0.61 over the period studied suggests that the radio division of Canada's only national PSB may not be exceeding expected average performance by any great measure.
For CBC Radio, this research presents a challenge. This analysis suggests that its performance across Canada between 1999 and 2007 may have been below expectations in some provinces, particularly Prince Edward Island. The PSB’s performance in 2005, as measured through this analysis, also declines markedly. On the other hand, CBC Radio's continued success in British Columbia could be counted as a cause for celebration. This study suggests that CBC Radio should be actively trying to increase its market share across Canada. However, it does indicate a positive trend in the national mean SP score's last few years; possibly, this trend will continue.

The scholarly implications of this research highlight the differences between public service broadcasting in Canada and Europe. Picard, examining European PSBs, found that most of them (e.g. those in Denmark, Italy, Germany, France, Finland, etc.) exceed performance by a substantial margin (Picard 2002a, 233). The results of this study present a somewhat different picture of the performance of one part of Canada's most prominent PSB. Clearly, broadcasting markets behave differently in Canada and warrant their own study. Comparative research with other media markets could further illustrate the influence of national context on the performance of public service broadcasting.

From a policy standpoint, this study is useful because it weighs the performance of CBC Radio against what can reasonably be expected of it. This helps to identify areas of performance above and below statistical expectations, which in turn could influence policy and research considerations. For example, a future content analysis could compare the practices of CBC Radio in British Columbia and Prince Edward Island to determine if differences in broadcast content contribute to the marked difference in performance. This research could also be paired with funding information to investigate the possibility of a relationship between finance structure and performance against expectations. This study provides a more meaningful measure of CBC Radio's market performance between 1999 and
2007 than traditional market-share measures, and therefore its findings are relevant to any policy that refers to the health of public service broadcasting in Canada in these years.

It is important to be mindful that market share is far from the only measure of a PSB's success – it makes little sense to focus only on market performance while neglecting to consider the actual content being broadcast and how that content is produced. Eaman's critique presents an important limitation to the present study: understanding CBC ratings in a more meaningful fashion does not necessarily lead to a greater understanding of the CBC's influence on Canada, and nor does it directly correlate with the health of public service broadcasting in Canada (Eaman 1994). However, the market share of the CBC is still a necessary-but-not-sufficient condition for the success of public service broadcasting. This study is not a content analysis, but an assessment of the delivery of a public service. Such research is only worthwhile if the service in question is itself important. However, market share is still a metric of some influence, and this study suggests that CBC Radio may fail to measure up to it in some respects. Further research is required ascertain the extent and character of this failure, but this study indicates that between 1999 and 2007, CBC Radio faced significant challenges in some provinces to fulfilling its task of fostering national cohesion and collective identity across Canada.
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