

POR-090-11

Canadian Books, Film, Periodicals and Music Opinion Survey

Executive Summary

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Department Contact: POR-ROP@pch.gc.ca



Canadian
Heritage

Patrimoine
canadien

Ce rapport est aussi disponible en français.

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I hereby certify as Senior Officer of Quorus Consulting Group Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research.

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed:



Rick Nadeau, President
Quorus Consulting Group Inc.

Executive Summary



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Research Objectives and Methodology

The Department of Canadian Heritage (PCH) has commissioned a survey to determine Canadians' attitudes, opinions and values towards Canadian books, films, periodicals and music. The specific objectives were:

- ✓ To assess Canadians' awareness and discovery of, and access to, Canadian cultural products.
- ✓ To understand Canadians' views and opinions about Canadian cultural products.
- ✓ To understand the impact of cultural consumption on Canadians' emotional well-being and sense of belonging.
- ✓ To analyse and understand these dimensions across various demographic considerations, including: age, sex, household (HH) income, educational level, region and ethnic origin, among others.

The survey results provide the Department with up-to-date information that will be used to assess the effectiveness of current policies and programs and to inform future policy decisions.

Important methodological considerations related to this study are as follows:

- ✓ A total of n=2,003 interviews with Canadians 18 years of age or older were completed via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology.
- ✓ Data collection for this study was conducted from June 2nd to June 19th, 2012.
- ✓ The data is weighted to replicate actual population distributions by age and sex within each region according to the most recently available Census data.
- ✓ Given the sampling approach and the sample size, we can confidently establish that the results presented in this report are representative of the adult Canadian population.

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Survey Results – Technology Adoption and Social Media

Nearly all Canadians have access to a computer and nearly all are connected to the Internet at home, work or elsewhere. Portable technologies are becoming increasingly popular with Canadians, as 6 in 10 own a portable digital music player, nearly half own a smartphone and just under one in four own a tablet or an e-reader. For all these technologies, ownership is consistently higher among younger Canadians.

Two thirds (65%) of respondents access a social media network at least once a month with younger respondents (between 18 and 34) more than twice as likely to be “social networkers” compared to those over 55 years old.

Survey Results – Books

Canadians rely on a variety of sources when it comes to discovering new books. Word of mouth and browsing at large chain bookstores are the most popular ways Canadians discover books, followed by bestseller lists, awards and critical acclaim, and the library. Internet-related approaches have yet to supplant more traditional bricks-and-mortar outlets as a way to discover new books – roughly 4 in 10 Canadians use book retailer websites *often* or *sometimes* to discover books compared to 60% for large chain bookstores.

Even though two-thirds of Canadians access social media networks, only 17% use social networking websites to discover new books.

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Survey Results – Books (continued)

Our study suggests that Canadians are reading more books today compared to a year ago. While nearly two thirds (65%) of respondents say their reading of books has stayed about the same compared to 12 months ago, 22% believe they are reading more books while 12% think it has actually decreased.

An important aspect of the book industry over the past 5 years has been the growing popularity of e-books and of the devices that have facilitated the consumption of this book format. This study reveals the following:

- One in five Canadians (21%) indicated they read e-books sometimes or often; this is likely to grow over the next year or so since 23% of respondents predict their e-book reading will increase over the next twelve months, while only 3% say it will decrease.
- From a technology standpoint, 4 in 10 Canadians who read e-books use an e-reader device, about 3 in 10 use a computer, and 28% use a tablet.
- When it comes to obtaining their e-books, 47% of Canadians who read e-books download them for free while 40% obtain them at libraries or by sharing them with friends; less than a third use virtual bookstores like the Amazon website (28%), Kobo (27%) or the Apple iBookstore (25%).

Respondents were asked a series of questions regarding the accessibility and importance of Canadian books and the extent to which the storylines are relevant to Canadian life. Results show that:

- Nearly all agree it is important that Canadians have access to Canadian books (92%).
- In terms of accessibility, 89% believe that it is easy to find books written by non-Canadian authors, a higher proportion compared to those who believe it is easy to find books written by Canadian authors, at 78%.
- Over three-quarters believe that reading Canadian nonfiction books helps them learn about subjects that are relevant to Canadian life (77%), and that reading Canadian fiction books helps them appreciate stories told from a Canadian perspective (77%).

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Survey Results – Feature Film

Technology has also had an impact on how Canadians consume feature film. While traditional distribution platforms such as regular television channels (89%), movie theatres and drive-ins (79%) and purchasing DVDs and Blu-rays (66%) are still popular, more recent formats have established important footholds. For instance, nearly half of all Canadians watch films on Video on Demand (VOD) or Pay-per-View (PPV) services at least a few times a year and one respondent in three downloads or streams films from the Internet at least a few times a year. In fact, 12% of Canadians download or stream films from the Internet at least once per week, putting it ahead of nearly all other platforms in terms of weekly frequency with the only exception being regular television channels.

The study measured the level of awareness Canadians have of a sample of Canadian feature films. Approximately half of all Canadians are aware of the films *Resident Evil: Afterlife* and *Goon*, nearly 2 in 5 have heard of *Starbuck*, and *Barney's Version* and nearly one quarter are aware of *Monsieur Lazhar*, *Incendies*, or *A Dangerous Method*. Despite only being released theatrically in Quebec at the time of the survey, 16% are aware of *Laurence Anyways*.

Respondents were asked a series of questions regarding the accessibility, promotion and importance of Canadian films. Results show the following:

- Nine in ten respondents agree it is important that Canadians have access to Canadian movies (90%) and 77% agree that they are interested in watching Canadian movies.
- In terms of distribution and accessibility, about half of Canadians feel they can easily find and watch Canadian movies, about 73% agree that Canadian broadcasters should show more Canadian movies on television and two thirds agree movie theatres should show more Canadian movies (65%).
- Half agree the stories in Canadian movies relate to them (50%) and 36% believe Canadian movies are well-promoted and advertised.

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Survey Results – Periodicals

Over 7 in 10 respondents (72%) say they read print magazines. Of these respondents, over three-quarters (77%) say they can either *often* or *sometimes* easily tell the difference between a Canadian and a non-Canadian print magazine.

While nearly half of respondents (48%) say that all or mostly all of the print magazines they read are Canadian, 32% of digital magazine readers say all or mostly all of the digital magazines they read are Canadian. Other findings related to print magazines include the following:

- The main reasons to choose a Canadian print magazine over a non-Canadian magazine are that the articles are more relevant to the readers (46%), and that the topics are of interest (32%).
- Nearly 4 in 5 respondents say they can *often* or *sometimes* find a Canadian print magazine on a topic of interest.
- The main two reasons for not reading print magazines at all are: lack of time (24%), and lack of interest in what is offered (21%).

Nearly three quarters of Canadians never read digital magazines, while 14% rarely do so, 9% sometimes, and 5% often. The main reasons for not reading at all or not reading *more* digital magazines are: that respondents prefer the experience of reading a print magazine (24%), they do not have an e-reader or a tablet (13%), or they do not have enough time (10%).

The digital magazine landscape is likely to change over the next year or so – about one in ten non-readers predict they are very or somewhat likely to start reading digital magazines in the next 6 months, while 23% of current digital magazine readers expect to read more electronically over the next 6 months.

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Survey Results – Periodicals (continued)

Approximately 9 in 10 respondents (91%) agree that it is important that Canadians have access to Canadian magazines.

- Over 80% agree that reading Canadian magazines helps them to appreciate Canadian culture and learn more about Canada.
- While 7 in 10 agree that Canadian magazines reflect their experiences and perspectives, less than half (48%) agree that this is the case for non-Canadian magazines.
- Finally, nearly 4 in 5 respondents agree that they depend on their local community newspaper to get news and information about their community.

Survey Results – Music

While Canadians tend to rely on a variety of sources when it comes to discovering new music, radio and word-of-mouth tend to dominate. Web-based sources such as online radio stations, social networks and online music stores have officially entered the mainstream when it comes to unearthing new music, with YouTube leading the virtual pack with 21% of respondents indicating they *often* discover new music this way and another 21% doing so *sometimes*. Unlike books, the web seems to have supplanted retail stores when it comes to discovering new music – only 25% of Canadians discover new music at retail stores either *often* or *sometimes*.

The impact of social networks on how Canadians discover new music was also made evident by the finding that shows 35% of social networkers have recommended music to friends via social media over the past 3 months.

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Survey Results – Music (continued)

The study revealed the following regarding the impact the Internet may have on the distribution of music in Canada over the coming years:

- Nearly 2 in 5 Canadians say they will likely purchase and download music from the Internet within the next 6 months.
- Respondents were asked their likelihood to subscribe to two different online music subscription services within the next 6 months: one for free with advertising between songs, and one without advertising, with unlimited music, for a monthly fee. One third of respondents (33%) say they are *very* or *somewhat* likely to subscribe to the free online music service while less than one fifth (17%) are likely to subscribe to the online unlimited music service for a monthly fee.
- When respondents were asked how they will purchase music in the future given four options, 13% believe they will only be downloading their music and another 29% will download most of their music. Purchasing CDs or records is still a popular option for half of Canadians, among whom 26% believe they will be purchasing most of their music on CDs or records and 25% will only be buying their music this way.

Respondents were asked a series of questions regarding the accessibility and importance of Canadian music. Results show the following:

- Over 9 in 10 respondents (92%) *strongly* or *somewhat* agree it is important that Canadians have access to music by Canadian artists.
- Similarly, 89% of respondents agree that listening to music contributes to their quality of life, while 86% agree it is important to them as Canadians that Canadian artists gain international recognition.
- In terms of accessibility, over 3 in 4 respondents (78%) agree they can easily find music by non-Canadian artists online, while 69% agree they can easily find music by Canadian artists online.

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For more information, please contact Canadian Heritage at por-rop@pch.gc.ca

Appendix A – Questionnaire



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A. Introduction/screener

- A1. Good evening / afternoon, my name is _____ and I am calling from Quorus Consulting on behalf of the Government of Canada. We are conducting a survey on the habits of Canadians regarding movies, music, books and periodicals. The survey takes about 15 to 20 minutes, your participation is voluntary and completely confidential and your answers will remain anonymous. Would you have time to help us out this evening / afternoon?

IF NEEDED: This survey follows the Privacy Act and is registered with the National Survey Registration System.

Yes	1	CONTINUE WITH SURVEY
No – no time now	2	SCHEDULE CALLBACK
No – not interested	3	ATTEMPT CONVERSION, OTHERWISE TERMINATE

- A2. Would you prefer that I continue in English or French?

English	1
French	2

- A3. To ensure a random selection of Canadians I was wondering if I could speak with the **[RANDOMIZE: youngest / second youngest / oldest / second oldest]** adult in your household?

Speaking	1	GO TO MAIN SURVEY
Gets the person	2	REPEAT A1 THEN GO TO MAIN SURVEY
Refusal	3	ATTEMPT CONVERSION, OTHERWISE TERMINATE

B. General Questions on Technology

B1. First, I have some general questions about technology. Do you own, or have access to, any of the following items, either at home, at work or elsewhere?

- a) A computer, whether a desktop or a laptop
- b) A smartphone (**IF NEEDED:** such as a BlackBerry, iPhone, or Android).
- c) A handheld E-book reader (**IF NEEDED:** such as a Sony Reader, a Kindle, or a Kobo, etc.)
- d) An Internet connection
- e) A portable digital music player or portable mp3 player (**IF NEEDED:** such as an iPod)
- f) A gaming console
- g) A tablet, other than an e-book reader (**IF NEEDED:** examples include the Samsung Galaxy, the Playbook and the iPad)

Yes	1
No	2
Don't know/Refuse (DO NOT READ)	9

B2. Do you access a social media network at least once a month? Examples include Facebook, Twitter, Google+ (GOOGLE PLUS) among others.

Yes	1
No	2
Don't know/Refuse (DO NOT READ)	9

PROGRAMMER INSTRUCTIONS FOR SECTION RANDOMIZATION: Randomly present the following blocks of questions to respondents:

- Periodicals block: C1-C13
- Books block: D1-D8
- Music block: E1-E6
- Film and Video block: F1-F4

C. Periodicals

Readership Preferences

- C1. I now have a few questions about the print magazines you read or browse in your **leisure time**, which excludes catalogues and those magazines you read for work or school.

It doesn't matter how you got the magazines, where you read them or whether they were free or paid for. Include magazines even if you just read (RED) a few articles or just flipped through them quickly.

Please remember the following questions focus on the print, or hardcopy versions of magazines.

- C2. Of the print magazines you read (REED) for leisure in a typical month, what is the balance between Canadian and non-Canadian magazines? Would you say they are...**READ LIST**

IF NEEDED: Non-Canadian means originating from countries outside Canada, including the US, Europe, etc.

All Canadian	1
Mostly Canadian	2
About the same Canadian and non-Canadian	3
Mostly non-Canadian	4
All non-Canadian	5
Don't read print magazines	6
Don't know/Refuse (DO NOT READ)	9

- C3. **[ASK IF C2=Don't read print magazines]** What is the main reason why you don't read print magazines? **INTERVIEWER NOTE:** Avoid a general answer such as "I don't read magazines" – probe to understand the specific reason why they don't read magazines. **DO NOT READ LIST – ACCEPT ONE RESPONSE**

Don't like what's offered / There are no magazines I'm interested in	1
Print magazines are too expensive	2
I don't have enough time / Too busy	3
I prefer reading books	4
I prefer to read the digital version of magazines	5
I get my news and information from other sources	6
Magazines are too out of date	7
Other - specify	77
Don't know/Refuse	99

IF C2= "Don't read print magazines", SKIP TO C7

- C4. How often can you easily tell the difference between a Canadian print magazine and a non-Canadian print magazine? Would you say... **READ LIST**

IF NEEDED: Non-Canadian means originating from countries outside Canada, including the US, Europe, etc.

Often	1
Sometimes	2
Rarely	3
Never	4
Don't read print magazines (DO NOT READ)	5
Don't know/Refuse (DO NOT READ)	9

- C5. **[SKIP IF C2= "All non-Canadian"]** Thinking generally, when you read (REED) a Canadian print magazine, why do you choose a Canadian magazine instead of a non-Canadian magazine? **DO NOT READ LIST – ACCEPT ALL THAT APPLY**

Articles are more relevant to me	1
Topic is of interest to me	2
Advertising is more relevant to me	3
Better price	4
Not interested in non-Canadian stories or content	5
I don't consciously choose between Canadian and non-Canadian	6
Other - specify	77
Don't know/Refuse	99

Availability

- C6. How often can you find a Canadian print magazine on the topic you are looking for? Would you say... **READ LIST**

Often	1
Sometimes	2
Rarely	3
Never	4
Don't read print magazines (DO NOT READ)	5
Don't know/Refuse (DO NOT READ)	9

Digital Magazines

C7. Now, a few questions about digital magazines read (RED) using an e-reader, a smartphone, a computer or a tablet, like an iPad. I'm not referring to general content found on magazine websites but rather an electronic version of the same magazine you would find on the newsstand.

C8. How often do you read digital magazines? Would you say... **READ LIST**

Often	1
Sometimes	2
Rarely	3
Never	4
Don't know/Refuse (DO NOT READ)	9

C9. **[ASK IF C8= "Sometimes", "Rarely" or "Never"]** What is the main reason you do not read **[INSERT IF C8= 2 or 3: more]** digital magazines? **INTERVIEWER NOTE:** Avoid a general answer such as "I don't read digital magazines" – probe to understand the specific reason why they don't read magazines. **DO NOT READ LIST – ACCEPT ONE RESPONSE**

I don't read magazines in any format	1
I prefer the experience of reading a print magazine.	2
I cannot find a digital magazine on the topic that I am looking for.	3
I find the print magazine easier to read and browse through.	4
It strains my eyes	5
Digital magazines are expensive	6
I don't have an e-reader or a tablet	7
I don't know how to get them	8
The magazine I read does not have a digital version	9
Other – specify	77
Don't know/Refuse	99

C10. **[ASK IF C8= "Never"]** In the next 6 months how likely are you to start reading digital magazines? Would you say... **READ LIST**

Very likely	1
Somewhat likely	2
Not very likely	3
Not at all likely	4
Don't know/Refuse (DO NOT READ)	9

IF C8= "Never", SKIP TO C13

C11. Over the next 6 months will you be... **READ LIST**

Reading digital magazines much more often than you are today	1
A little more than today	2
A little less	3
Much less, or,	4
About the same as you are today	5
Don't know/Refuse (DO NOT READ)	9

C12. Of the digital magazines you read, what is the balance between Canadian and non-Canadian digital magazines? Is it... **READ LIST**

All Canadian	1
Mostly Canadian	2
About the same Canadian and non-Canadian	3
Mostly non-Canadian	4
All non-Canadian	5
Don't know/Refuse (DO NOT READ)	9

Quality / Emotive response

C13. Please rate your level of agreement with the following statements considering both print and digital magazines – would you say you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree or strongly disagree that...: **RANDOMIZE LIST**

- Reading Canadian magazines helps you appreciate Canadian culture and learn more about Canada.
- Canadian magazines reflect your experiences and perspectives.
- Non-Canadian magazines reflect your experiences and perspectives.
- It is important that Canadians have access to Canadian magazines.
- You depend on your local community newspaper to get news and information about your community.

Would you say you: **REPEAT ONLY AS NEEDED**

Strongly agree	1
Somewhat agree	2
Neither agree or disagree	3
Somewhat disagree	4
Strongly disagree	5
Don't know/Refuse (DO NOT READ)	9

D. Books

- D1. I now have questions about the books you read for leisure or interest, which excludes books you read for work or school. Please include all book formats, including audio books and e-books. As well...
- It doesn't matter how you got the books – whether you bought them, were given them, or whether you borrowed them from the library or from a friend.
 - It doesn't matter in which language they were written, and,
 - It doesn't matter how much or how little you have read.

Discovery

- D2. I will now read a list of the different ways people discover new books – do you **discover new books** often, sometimes, rarely or never... **DO NOT RANDOMIZE LIST**

- a) Through friends and family?
- b) By looking at bestseller lists?
- c) Based on awards or critical acclaim?
- d) At the library?
- e) By browsing at large chain bookstores like Chapters or Renaud-Bray?
- f) By browsing at independent bookstores?
- g) By browsing at general retail stores like Wal-Mart, Costco, etc?
- h) At book fairs and book readings?
- i) By browsing book retailer websites, such as amazon.ca, chapters.ca, etc?
- j) Through social networking websites?

Would you say: **REPEAT ONLY AS NEEDED**

Often	1
Sometimes	2
Rarely	3
Never	4
Don't know/Refuse (DO NOT READ)	9

Consumption

- D3. Has your reading of books for leisure increased, decreased or stayed about the same over the last twelve months?
- | | |
|--|---|
| It has increased | 1 |
| It has stayed about the same | 2 |
| It has decreased | 3 |
| Don't know/Refuse (DO NOT READ) | 9 |

- D4. How often do you read e-books? **(IF NEEDED: e-books are digital versions of books that you can read using a computer, a tablet or an e-reader. This does not include audio books.)** Would you say...**READ LIST**

Often	1
Sometimes	2
Rarely	3
Never	4
Don't know/Refuse (DO NOT READ)	9

- D5. Do you expect that in twelve months from now you will be... **READ LIST – DO NOT SHOW OPTIONS 3 AND 4 IF D4= “Never”**

INTERVIEWER NOTE: If the respondent does not read e-books today and does not intend to within the next 12 months, select option “About the same as you are today”

Reading e-books much more often than you are today	1
A little more than today	2
A little less	3
Much less, or,	4
About the same as you are today	5
Don't know/Refuse (DO NOT READ)	9

IF D4=“Never”, SKIP TO D8

- D6. How often do you obtain your e-books the following ways? Do you often, sometimes, rarely or never ... **DO NOT RANDOMIZE LIST**

- Get them through the Amazon website?
- How about through Kobo?
- How about through the Apple iBookstore?
- How about through libraries?
- How often do you download them for free?
- How often do you get them through sharing with friends?

Would you say: **REPEAT ONLY AS NEEDED**

Often	1
Sometimes	2
Rarely	3
Never	4
Don't know/Refuse (DO NOT READ)	9

D7. How do you typically read your e-books? **DO NOT READ LIST – ACCEPT ALL THAT APPLY**

On an e-reader - a handheld device made primarily for e-book reading, such as a Kobo or Kindle	1
On a smartphone such as an iPhone or Blackberry	2
On a desktop or laptop computer	3
On a tablet computer like an iPad, Samsung Galaxy or Kindle Fire	4
Print them out	5
Other - specify	77
Don't know/Refuse	99

Emotive

D8. Please rate your level of agreement with the following statements considering all book formats – would you say you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree or strongly disagree that...: **DO NOT RANDOMIZE LIST**

- It is important that Canadians have access to Canadian books.
- You can easily find books written by Canadian authors.
- You can easily find books written by non-Canadian authors. **IF NEEDED:** Non-Canadian means originating from countries outside Canada, including the US, Europe, etc.
- Reading Canadian nonfiction books helps you learn about subjects that are relevant to Canadian life.
- Reading Canadian fiction books helps you appreciate stories told from a Canadian perspective.

Would you say you: **REPEAT ONLY AS NEEDED**

Strongly agree	1
Somewhat agree	2
Neither agree or disagree	3
Somewhat disagree	4
Strongly disagree	5
[SHOW FOR b-e] I don't read those kinds of books (DO NOT READ)	6
Don't know/Refuse (DO NOT READ)	9

E. Music

Music Discovery

E1. I now have a few questions about music. Do you **discover new music** often, sometimes, rarely or never ... **DO NOT RANDOMIZE LIST**

- a) Through friends and family?
- b) By listening to radio? (**IF NEEDED:** AM/FM, like the radio in your car)
- c) Through social networks (Facebook, Twitter)?
- d) On YouTube?
- e) Through online music stores like iTunes?
- f) By listening to online radio stations?
- g) At concerts?
- h) At retail stores?
- i) Through awards like the Juno Awards?
- j) Through articles in newspapers and magazines?

Would you say: **REPEAT ONLY AS NEEDED**

Often	1
Sometimes	2
Rarely	3
Never	4
Don't know/Refuse (DO NOT READ)	9

Music Sharing on Social Media

E2. [**ASK IF B2="Yes"**] In the past 3 months, have you used social media such as Facebook or Twitter to recommend music to your friends or Twitter followers?

Yes	1
No	2
Don't know/Refuse (DO NOT READ)	9

New consumption

E3. How likely are you to subscribe to the following types of services within the next 6 months:

- a) A service that allows you to select and listen to music from the Internet for free with advertising between songs? **IF NEEDED:** You can basically listen to as much music as you want from a broad library of musicians for free, all online – you don't actually own the music and you have to listen to advertising.
- b) A service that allows you to select and listen to an unlimited amount of music from the Internet without advertising for a monthly fee? These services typically cost about \$10 per month. **IF**

NEEDED: You can listen to as much music as you want and choose from a broad library of musicians, all online – you don't actually own the music, you can just listen to it.

Would you say... **READ LIST – REPEAT ONLY AS NEEDED**

Very likely	1
Somewhat likely	2
Not very likely	3
Not at all likely	4
Already subscribe (DO NOT READ)	5
Don't know/Refuse (DO NOT READ)	9

- E4. How likely are you to purchase and download music from the Internet within the next 6 months?
Would you say... **READ LIST – REPEAT ONLY AS NEEDED**

Very likely	1
Somewhat likely	2
Not very likely	3
Not at all likely	4
Don't know/Refuse (DO NOT READ)	9

Emotive and Possibilities

- E5. Please rate your level of agreement with the following statements – would you say you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree or strongly disagree that...:
RANDOMIZE STATEMENTS

- a) It is important that Canadians have access to music by Canadian artists.
- b) Listening to music contributes to your quality of life.
- c) It is important to you as a Canadian that Canadian artists gain international recognition.
- d) You can easily find music by Canadian artists online.
- e) You can easily find music by non-Canadian artists online.

Would you say you: **REPEAT ONLY AS NEEDED**

Strongly agree	1
Somewhat agree	2
Neither agree or disagree	3
Somewhat disagree	4
Strongly disagree	5
Don't know/Refuse (DO NOT READ)	9

E6. Which of the following four options best applies to the way you will purchase music in the future:
READ LIST – DO NOT RANDOMIZE STATEMENTS

- | | |
|--|---|
| Option 1: You will only be downloading music | 1 |
| Option 2: You will download most of your music | 2 |
| Option 3: You will purchase most of your music on CD's or records, or, | 3 |
| Option 4: You will only be purchasing CD's or records | 4 |
| Don't know/Refuse (DO NOT READ) | 9 |

F. Film

F1. I now have a few questions about movies. How often do you...

- Watch movies in a theatre or at a drive in?
- Rent movies from a rental store?
- Buy DVD's or Blu-rays?
- Watch movies on video-on-demand (VOD) or pay-per-view services? (**IF NEEDED:** This does not include Netflix)
- Watch movies on regular television channels?
- Download or stream movies from the Internet using a service such as Netflix or iTunes?
- Watch movies on hand-held mobile devices such as an iPod, a cellular phone, or a tablet?
- Watch movies in an airplane using the onboard entertainment system?
- Watch movies through a pay-per-view service at a hotel?

Would you say... **READ LIST - REPEAT ONLY AS NEEDED**

- | | |
|--|---|
| Every day | 1 |
| At least once per week | 2 |
| A few times per month | 3 |
| A few times a year | 4 |
| Never | 5 |
| Don't know/Refuse (DO NOT READ) | 9 |

F2. Have you heard of any of the following movies: **RANDOMIZE LIST**

- Laurence Anyways
- Resident Evil: Afterlife
- Incendies (AIN-SAN-DEE)
- Monsieur Lazhar
- A Dangerous Method
- Goon
- Barney's Version
- Starbuck

Yes	1
No	2

F3. Please rate your level of agreement with the following statements – would you say you strongly agree, somewhat agree, neither agree or disagree, somewhat disagree or strongly disagree that...:

RANDOMIZE STATEMENTS

- a) It is important that Canadians have access to Canadian movies.
- b) You are interested in watching Canadian movies.
- c) The stories in Canadian movies relate to you.
- d) You can easily find and watch Canadian movies.
- e) Canadian movies are well promoted and advertised.
- f) Movie theatres should show more Canadian movies.
- g) Canadian broadcasters should show more Canadian movies on television.

Would you say you: **READ LIST – REPEAT ONLY AS NEEDED**

Strongly agree	1
Somewhat agree	2
Neither agree or disagree	3
Somewhat disagree	4
Strongly disagree	5
Don't know/Refuse (DO NOT READ)	9

F4. **[ASK IF B2="Yes"]** In the past 3 months, have you used social media such as Facebook or Twitter to recommend a movie to your friends or Twitter followers?

Yes	1
No	2
Don't know/Refuse (DO NOT READ)	9

G. General Demographics

I have some final questions that will help us to analyze the results...

G1. Gender **[Do not ask: record based on interviewer observation]**

Male	1
Female	2

G2. In what year were you born?

(Record year - ____)

G3. Which of the following diplomas or degrees have you completed? **READ LIST**

High School diploma or equivalent	1
Registered Apprenticeship or other trades certificate or diploma	2
College, CEGEP or other non-university certificate or diploma	3
University degree, certificate or diploma	4
None	5
Don't know/Refuse (DO NOT READ)	9

G4. What language do you speak most often at home? **READ LIST - ACCEPT UP TO TWO RESPONSES**

English	1
French	2
Other – specify	77
Don't know/Refuse (DO NOT READ)	99

G5. Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes? Is it... **READ LIST**

Under \$20,000	1
\$20,000 to just under \$ 40,000	2
\$40,000 to just under \$ 60,000	3
\$60,000 to just under \$ 80,000	4
\$80,000 to just under \$100,000	5
\$100,000 to just under \$150,000	6
\$150,000 and above	7
Don't know/Refuse (DO NOT READ)	9

G6. Do you consider yourself...**READ LIST - SELECT ALL THAT APPLY**

(**READ IF NECESSARY:** A member of a visible minority in Canada may be defined as someone **[other than an Aboriginal person]** who is non-white in colour/race, regardless of place of birth. For example, Black, Chinese, Filipino, Japanese, Korean, South Asian/East Indian, Southeast Asian, non-white West Asian, North African or Arab, non-white Latin American, person of mixed origin [with one parent in one of the visible minority groups in this list], or other visible minority group.)

A person with a disability	1
A member of a visible minority group	2
An Aboriginal person	3
None of the above	4
Don't know /Refuse (DO NOT READ)	9