

Canadian Books, Film, **Periodicals and Music** Opinion Survey

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 – Questionnaires



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Questionnaires



English
Questionnaire



French
Questionnaire

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