

POR-090-11

# Canadian Books, Film, Periodicals and Music Opinion Survey

FINAL REPORT

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Ce rapport est aussi disponible en français.

# Political Neutrality Certification

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.

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# Executive Summary



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# Executive Summary

## 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 2<sup>nd</sup> to June 19<sup>th</sup>, 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.

# Executive Summary

## 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.

# Executive Summary

## 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%).

# Executive Summary

## 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.



# Executive Summary

## 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.

# Executive Summary

## 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.

# Executive Summary

## 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.

# Executive Summary

**Supplier Name: Quorus Consulting Group Inc.**

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**Contract Award Date: March 30,2012**

**Contract Amount (including HST): \$61,618.90**

**For more information, please contact Canadian Heritage at [por-rop@pch.gc.ca](mailto:por-rop@pch.gc.ca)**

# Research Objectives and Methodology



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# Research Objectives

The Department of Canadian Heritage (PCH) has commissioned a survey to determine Canadians' attitudes, opinions and values towards Canadian books, films, music and periodicals. PCH contracted Quorus Consulting Group Inc. to conduct this survey. The survey's 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.

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.

# Research Methodology

Important methodological considerations related to this study are as follows:

- ✓ Data collection was conducted via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology from dialing facilities in Ottawa.
- ✓ Data collection for this study was conducted from June 2<sup>nd</sup> to June 19<sup>th</sup>, 2012.
- ✓ Random probability sampling was conducted, using the most up-to-date and accurate sample available giving every Canadian household with a valid telephone number an equal chance of being selected for the study. Households that rely exclusively on cellular service and that did not transfer a residential telephone number to their cellular phone would have been excluded from this study. Based on various estimates, this would result in approximately 10% of Canadian households being excluded from this study.
- ✓ All respondents were given the choice of conducting the survey in English or French.
- ✓ A total of n=2,003 respondents 18 years of age or older, completed the survey.
- ✓ Based on the Market Research and Intelligence Association (MRIA) calculation, the response rate for this study was 3.1%.
- ✓ 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.

# Margins of Error

- Because of the random probability sampling procedure used for the survey, and the associated weighting procedures, margins of error have been calculated.
- It is important to note that the margins of error outlined on the following page should be considered the maximum margins associated with affirmative responses of 50%. The margins of error will vary based on a variety of factors from question to question, based on sample size and the actual percent to which the margin of error is being associated.
- It is also important to note, that results associated with population sub-groups may be based on smaller sample sizes and will therefore have a higher margin of error. The smaller the sample size, the larger the margin of error. The sample sizes for each question reported in this document are noted at the bottom of each page.
- The sample sizes shown on the next page for age and language spoken at home do not include respondents who indicated “Don’t know/Refuse”, therefore the sum of the sub-segments may not add up to the full sample size of 2,003.
- The sample sizes indicated on the following page are unweighted numbers.



# Margins of Error (Continued)

Segment	Sample size (n)	Margin of error
<b>Total (Canada)</b>	2,003	+/-2.2%
<b>Provinces / Regions</b>		
Atlantic*	200	+/- 6.9%
Quebec	600	+/-4.0%
Ontario	537	+/-4.2%
Manitoba/Saskatchewan	201	+/-6.9%
Alberta	230	+/-6.5%
British Columbia / Territories**	235	+/-6.4%
Rest of Canada (ROC)***	1,403	+/-2.6%
<b>Age Groups****</b>		
18-34	280	+/-6.2%
35-54	722	+/-5.9%
55+	960	+/-3.2%
<b>Language Spoken at Home****</b>		
English only	1,208	+/-2.8%
French only	431	+/-4.7%
Bilingual (English and French are spoken at home)	164	+/-7.6%
English or French and/or other	193	+/-7.1%

Segment	Sample size (n)	Margin of error
<b>Urban / Rural</b>		
Urban	1,581	+/- 2.5%
Rural	422	+/-4.8%
<b>Gender</b>		
Male	1,000	+/-3.1%
Female	1,003	+/-3.1%
<b>Social Media Networks</b>		
Users	1,151	+/-2.9%
Non-users	842	+/-3.4%
<b>Household (HH) Income</b>		
<\$40K	403	+/-4.9%
\$40K - \$60K	313	+/-5.5%
\$60K - \$80K	281	+/-5.8%
\$80K - \$100K	224	+/-6.5%
\$100K +	445	+/-4.6%

\*Atlantic includes the following provinces: New Brunswick, Prince Edward Island, Nova Scotia, and Newfoundland and Labrador.

\*\*Territories includes Northwest Territories, Nunavut, and Yukon.

\*\*\*Sum of all provinces and territories besides Quebec

\*\*\*\*The sample sizes for age and language spoken at home do not include respondents who indicated "Don't know/Refuse", therefore the sum of the sub-segments may not add up to the full sample size of 2,003.

# Comparative Analysis Considerations

This report includes time-series data for the four cultural industries sourced from public opinion research studies previously conducted by the Department of Canadian Heritage. The reference studies for each theme are the following:

- ✓ **Books:** 2008, with 1,502 Canadian households
- ✓ **Feature Film:** 2005, with 2,002 Canadian households
- ✓ **Periodicals:** 2008, with 1,500 Canadian households
- ✓ **Music:** 2008, with 1,505 Canadian households

Comparisons with previous studies conducted in 2005 and 2008 are in large part possible because the data collection methodology used in those studies has been replicated in 2012. Data collection for all studies was completed via telephone-based systems, with a random, quota-based, sample of Canadian households.

The comparative analysis featured in this report highlights, where applicable, the appropriateness and limitations of the data comparisons being made. Often the limitations of directly comparing results between two studies are related to different question formulations from one study to the other, different response options or scales used, or to the manner in which a question was asked (i.e. open-ended versus closed-ended questions). In cases where the comparison warrants some caution due to methodological differences between the two studies, a note to the reader reminding them of these differences has been included.

The comparative analysis for the feature film data is the only one to involve results dating back to 2005. Given the longer lapse between studies, shifts in technology usage will likely be larger, thereby resulting in potentially larger impacts on feature film consumption.

A summary of the key methodological aspects for each of the four studies is presented in Appendix B.

# Survey Results



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# Technology Adoption and Social Media

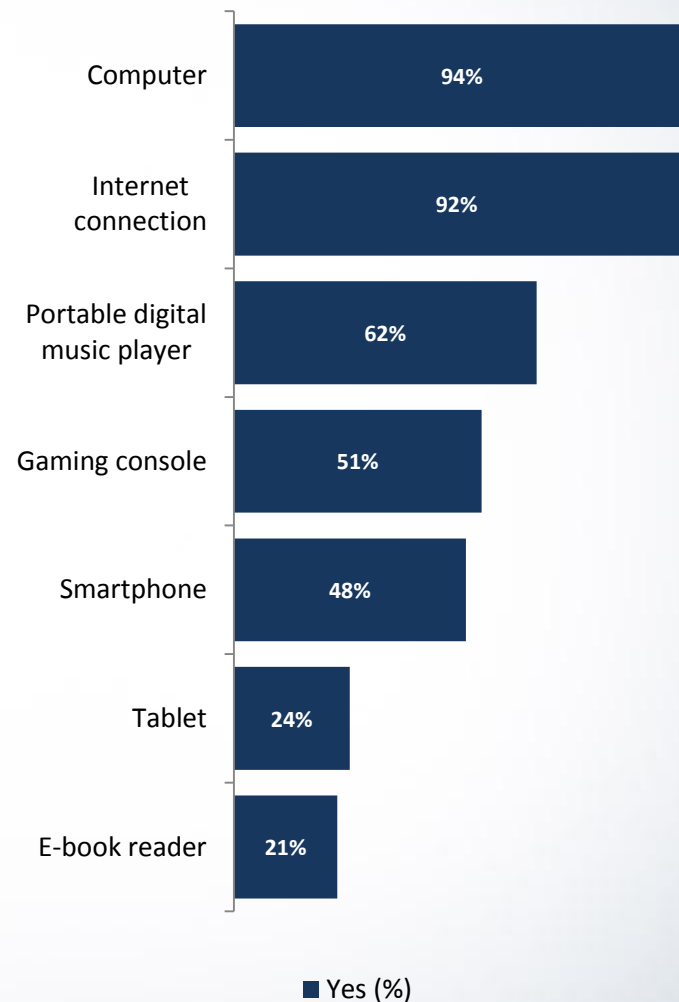


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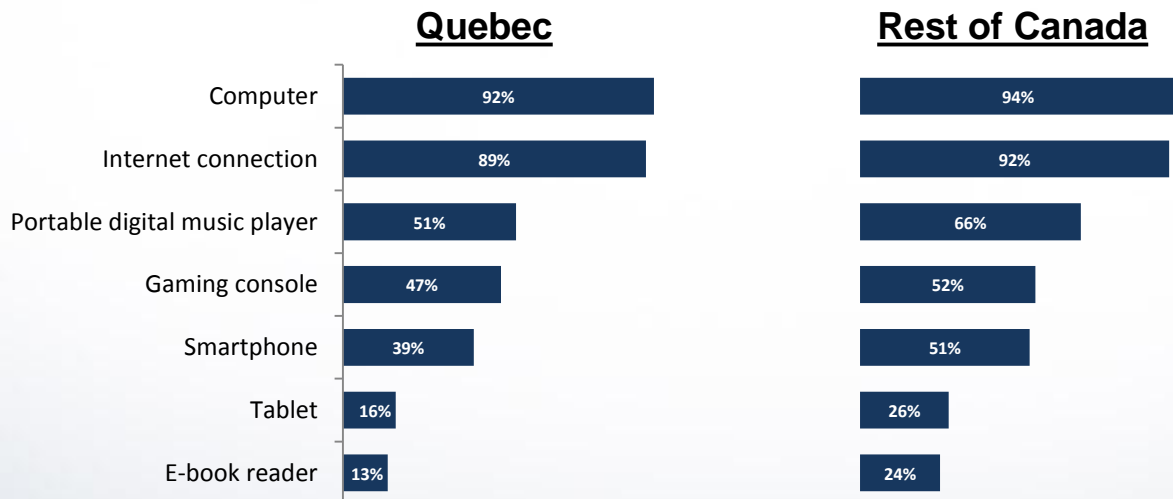
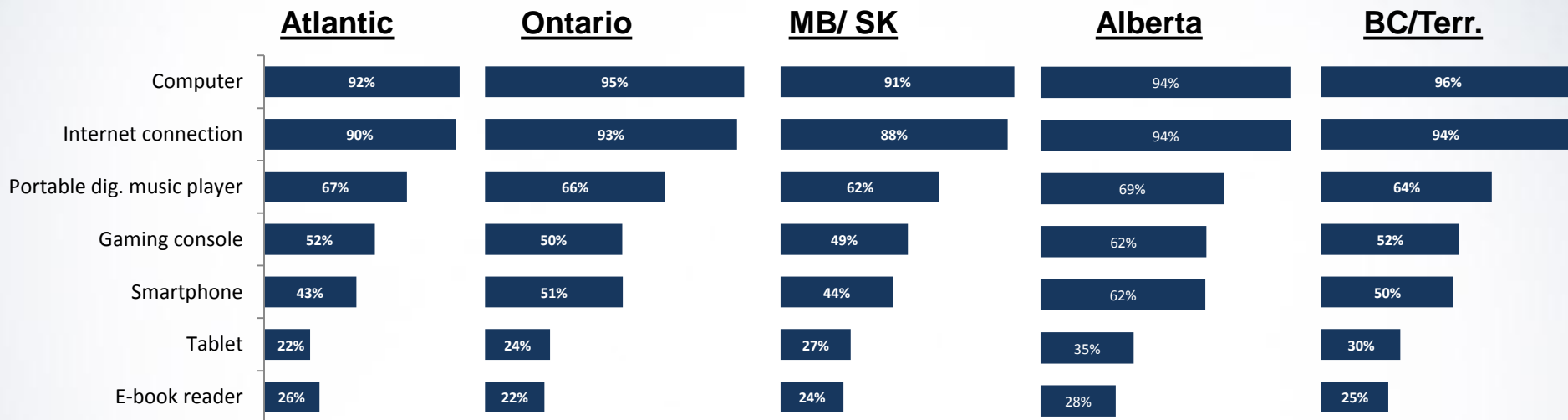
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# Technology Adoption

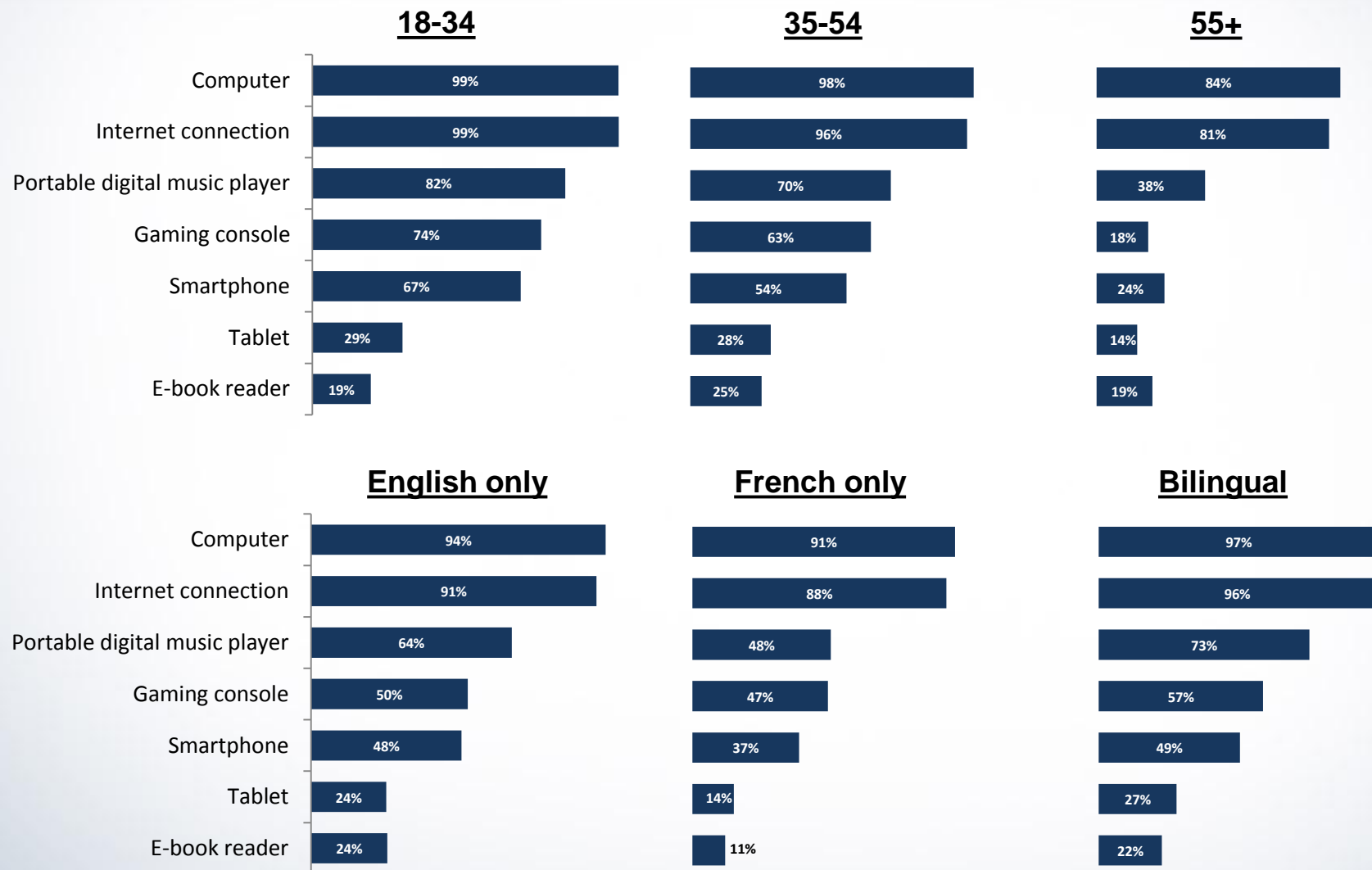
- By and large, the technology equipment to which Canadians have access are a computer and an Internet connection. Over 9 in 10 respondents say they own or have access to a computer or Internet connection whether at home, at work or elsewhere.
- Over 3 in 5 say they have a portable digital music player (PDMP), such as an mp3 player.
- Approximately half of respondents have a gaming console, or a Smartphone, while one quarter or less have a tablet, or an e-book reader.
- Ownership of smartphones tends to be higher among Albertans, those who speak only English at home, men, social media networkers, and those who live in an urban area. The younger respondents are, the more likely they are to have a smartphone.
- Respondents with a gaming console are more likely to be from Alberta and least likely to be from Quebec. They are also more likely to be men and social media networkers. The younger respondents are, the more likely they are to have a gaming console.
- Respondents with access to a tablet are more likely to be from Alberta and least likely to be from Quebec. They are more likely to be under 55 years of age, and social media networkers.
- Those with an e-book reader are least likely to be from Quebec than other parts of Canada. As well, they are more likely to be social media networkers.



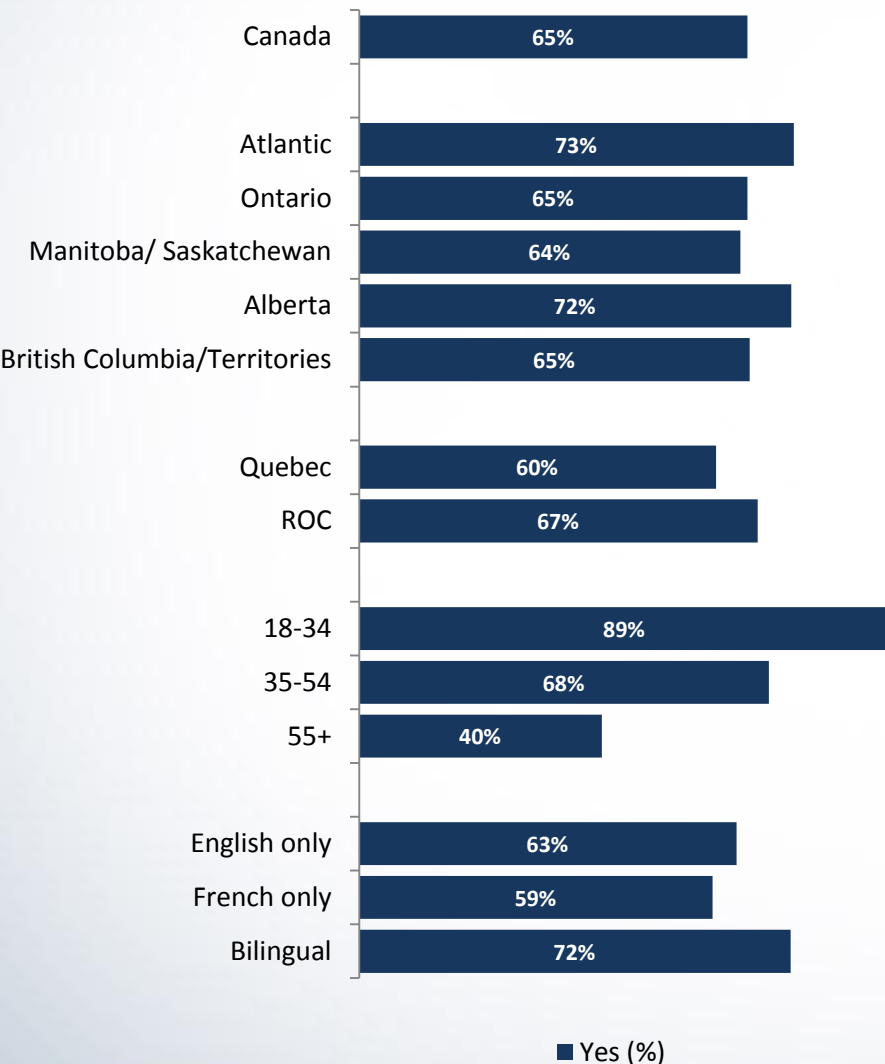
# Technology Adoption – by Region



# Technology Adoption – by Age and Language Spoken at Home



# Social Media Networking



- Two thirds (65%) of respondents access a social media network at least once a month.
- The younger respondents are, the more likely they are to access social media networks – in fact, those between 18 and 34 are more than twice as likely to be users compared to those over 55 years old.
- Respondents in Atlantic provinces and Alberta are more likely than those in Quebec to access social media networks at least once a month.
- Similarly, bilingual respondents are more likely to access social media, than respondents who only speak English, or only speak French at home.



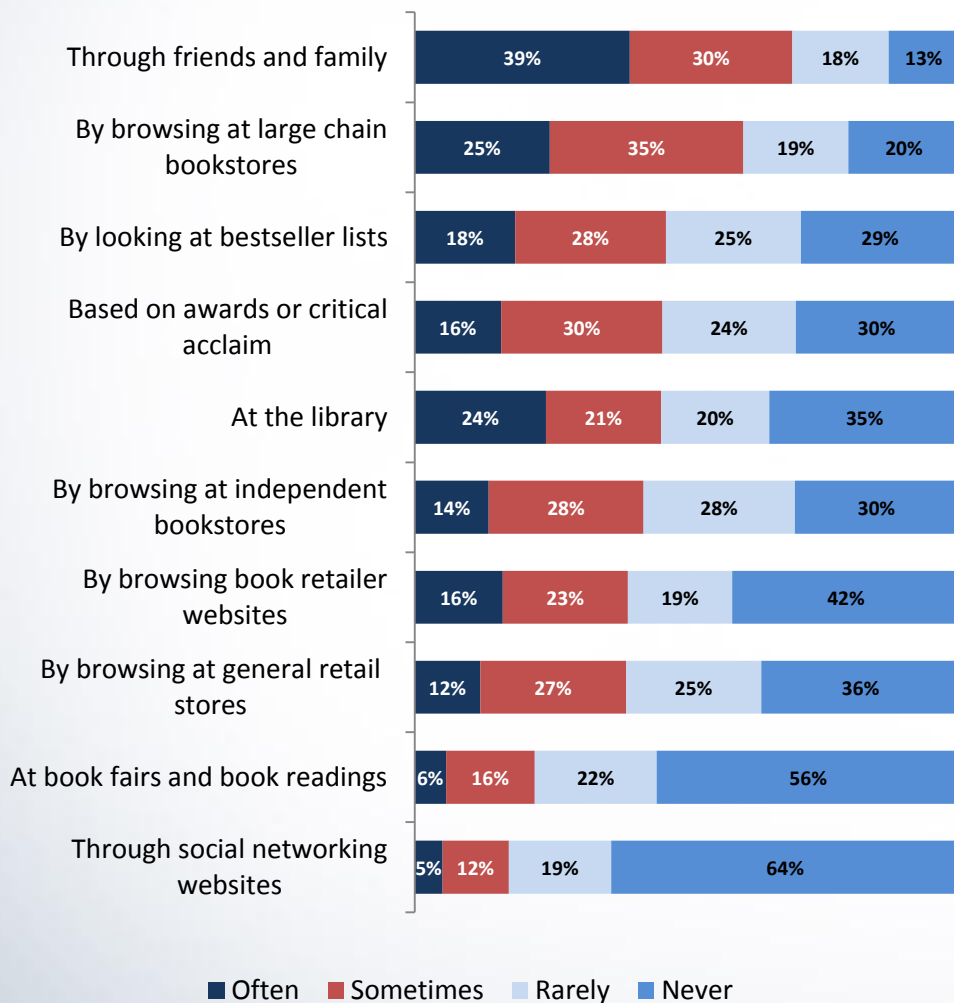
# Books



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# How Canadians Discover New Books



- Word of mouth is the most common way respondents say they come across new books. While 69% *often* or *sometimes* learn about new books this way, 60% do so by browsing at large chain bookstores.
- Other ways of discovering new books that are popular among nearly half of respondents are bestseller lists, awards and critical acclaim, and the library.
- Approximately 2 in 5 respondents say they *often* or *sometimes* discover new books by browsing independent bookstores, book retailer websites or general retail stores.
- The least popular approaches are book fairs and book readings, along with social networking websites.

# How Canadians Discover New Books

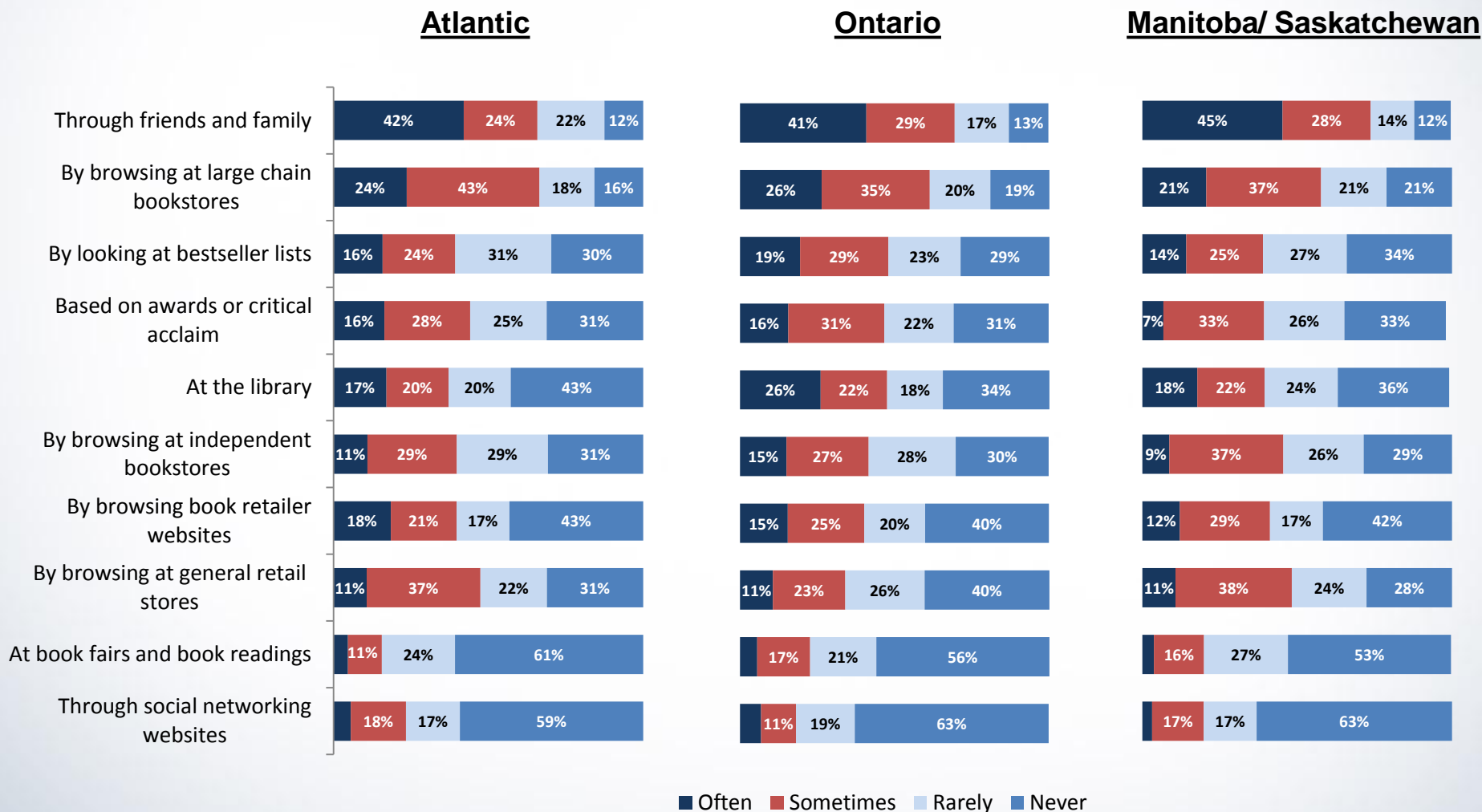


Some of the more noteworthy differences among the various sub-groups include the following:

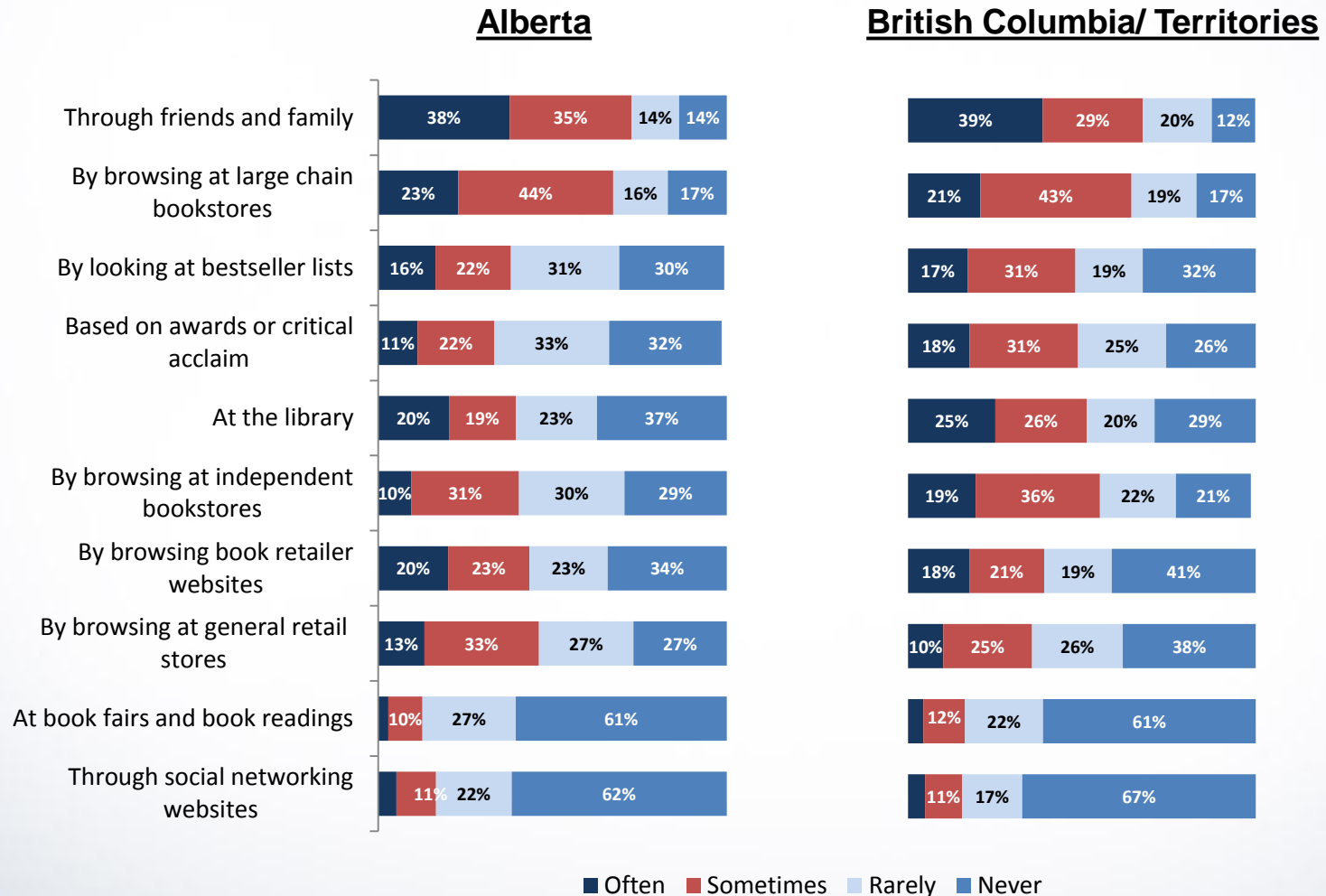
Ways of Discovering New Books	Profile of Canadians Most Likely to Use These Methods
<b>Friends and Family</b>	Women Social media networkers University educated E-book reader owners
<b>Large chain bookstores</b>	British Columbia residents Social media networkers Women University educated E-book reader owners
<b>Library</b>	Speak only French at home Residents of Ontario and Quebec Women University educated E-book reader owners
<b>Best seller lists</b>	Women At least 65 years old Do not speak only French at home Social media networkers Urban residents University educated E-book reader owners
<b>Book retailer websites</b>	Household income of at least \$80K 18 to 54 years old Do not speak only French at home Social media networkers Urban residents University educated E-book reader owners

Ways of Discovering New Books	Profile of Canadians Most Likely to Use These Methods
<b>Awards or critical acclaims</b>	Atlantic, Quebec, Ontario, and British Columbia residents Women Speak only French at home University educated Household income under \$40K E-book reader owners
<b>Independent bookstores</b>	Women Social media networkers E-book reader owners
<b>General retail stores</b>	Household income under \$40K Speak only French at home Quebec residents Social media networkers Women
<b>Book fairs and book readings</b>	Household income under \$40K Speak only French at home Quebec residents E-book reader owners
<b>Social networking websites</b>	Bilingual Smartphone, e-book, and tablet owners Social media networkers Residents of other provinces than Quebec

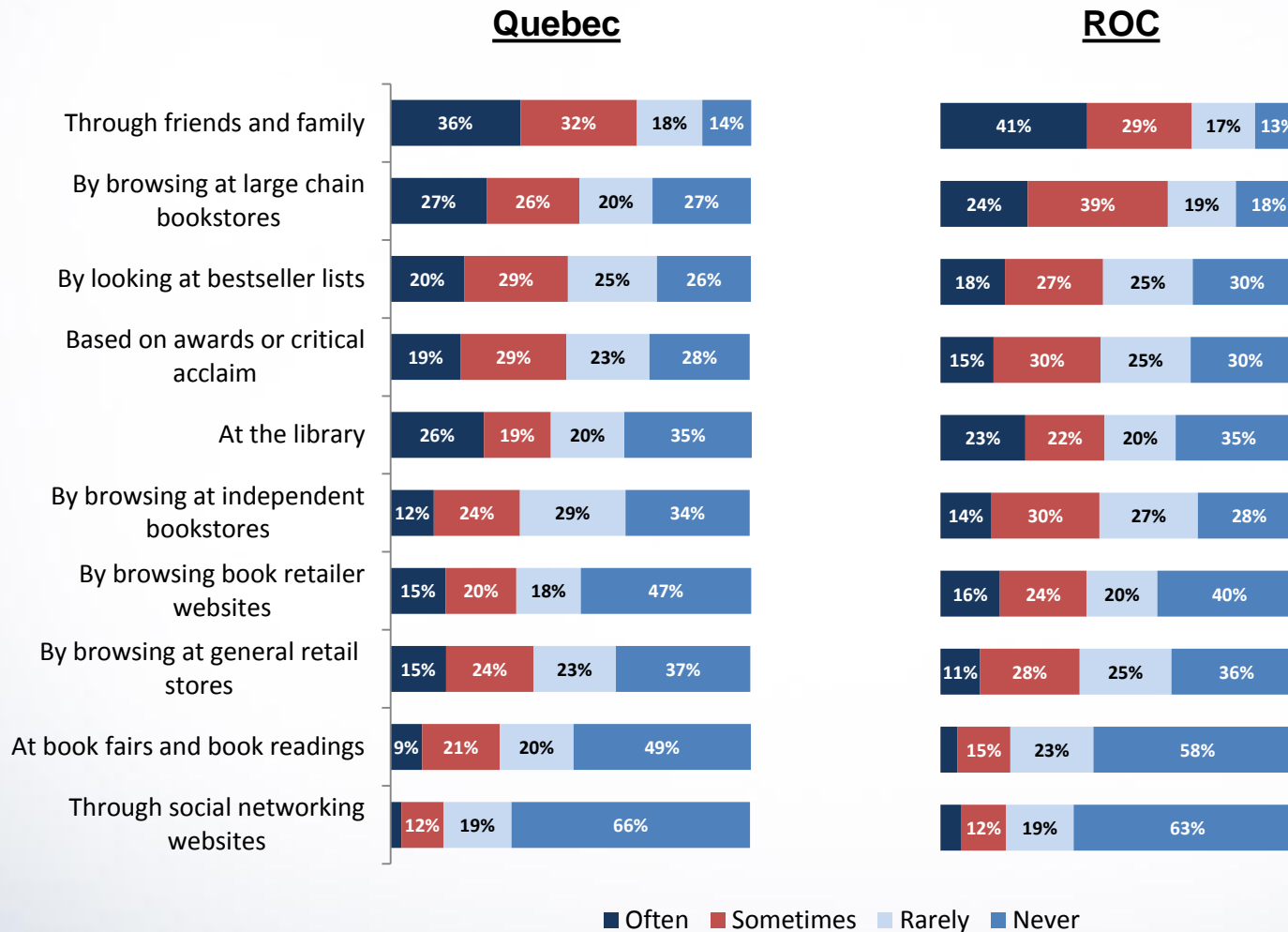
# How Canadians Discover New Books – by Region



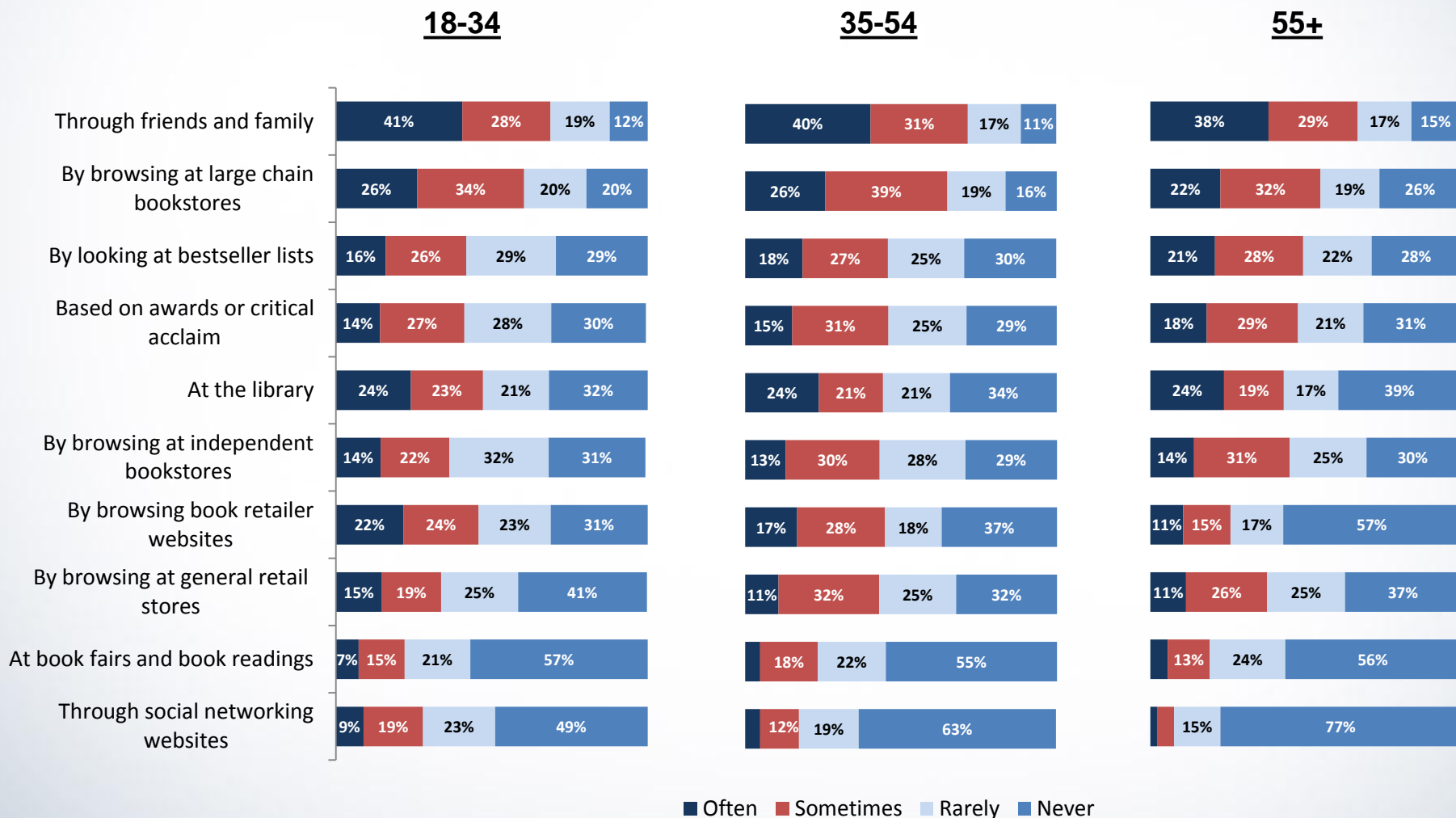
# How Canadians Discover New Books – by Region



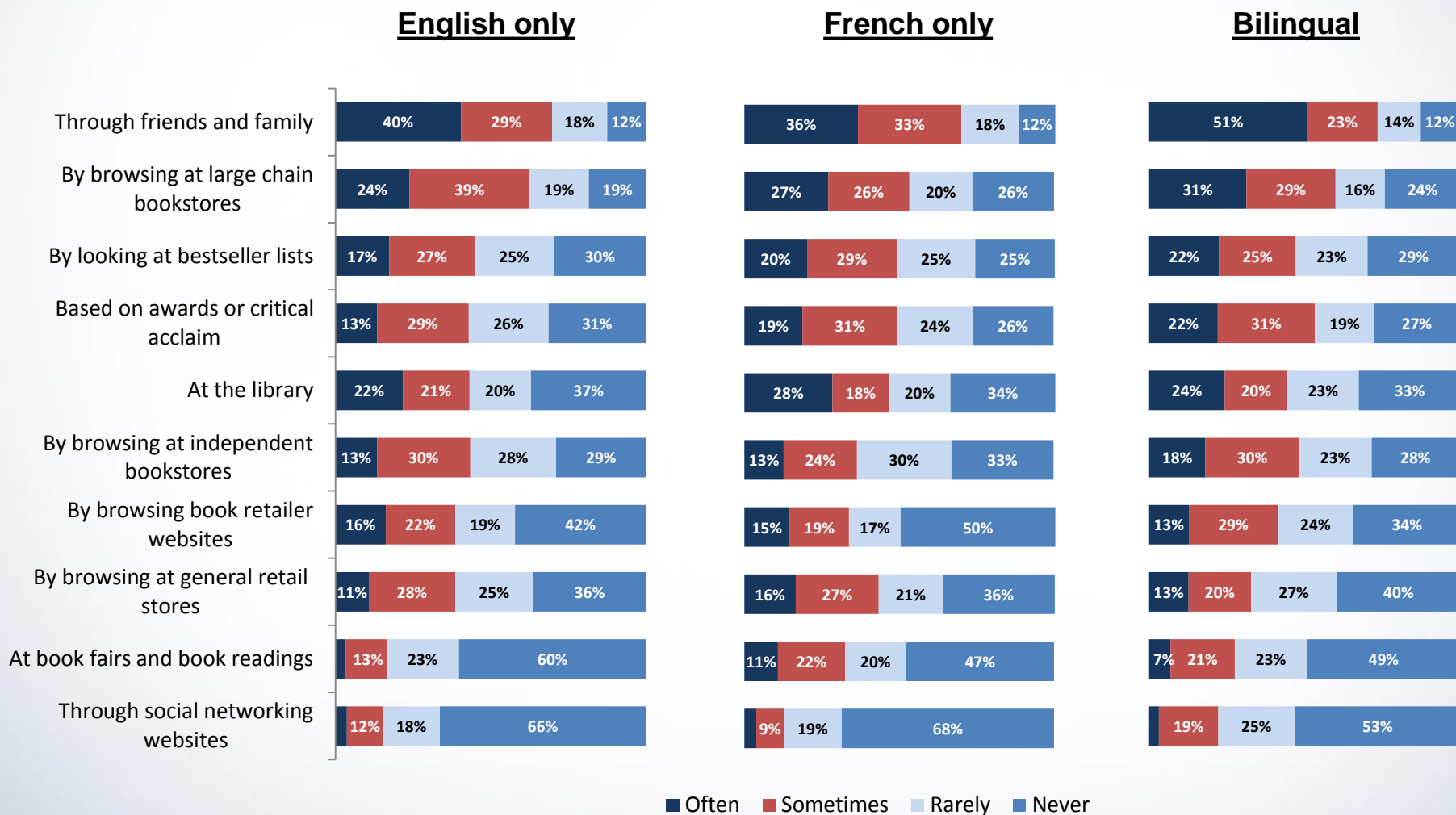
# How Canadians Discover New Books – by Region



# How Canadians Discover New Books – by Age



# How Canadians Discover New Books – by Language Spoken at Home





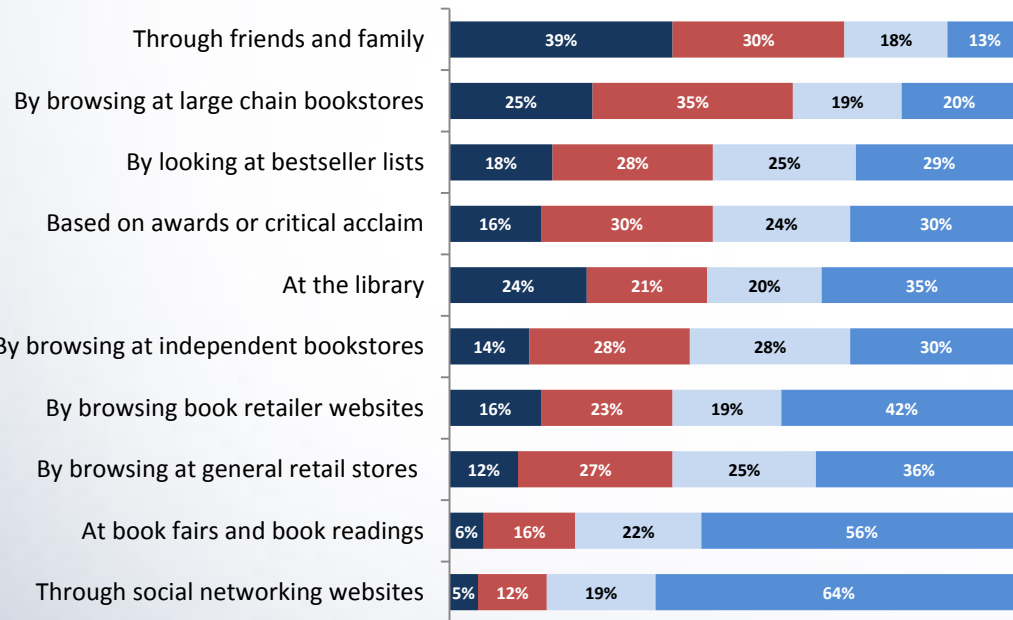
# How Canadians Discover New Books - Comparative Analysis



This comparative analysis involves different methodologies. The 2008 and 2012 data below is intended to illustrate a trend, but cannot be directly compared.

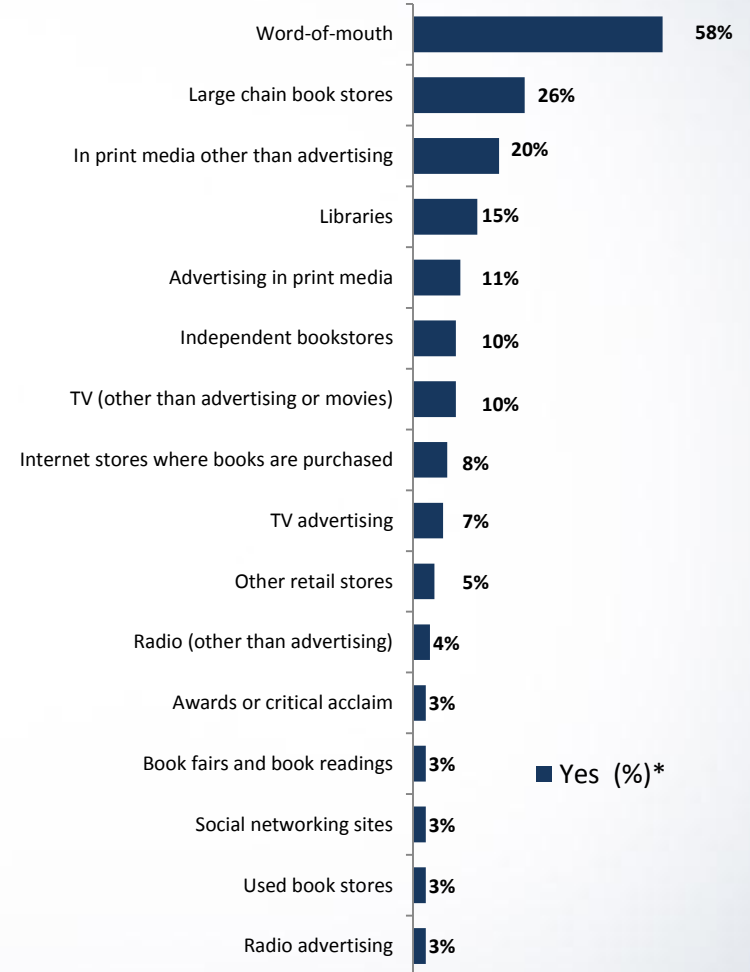
To understand how Canadians discover new books, a prompted, scale-based approach was used in 2012 whereas an unprompted, open-ended approach was used in 2008. While the results cannot be directly compared since prompted questions will almost always elicit higher results than unprompted ones, there are a few trends that can be highlighted. For instance, word-of-mouth and browsing at large chain bookstores remain popular ways Canadians discover new books. It is also fairly safe to conclude that the Internet channels have taken on a greater role, such as book retailer websites and social networking websites.

## 2012



■ Often ■ Sometimes ■ Rarely ■ Never

## 2008



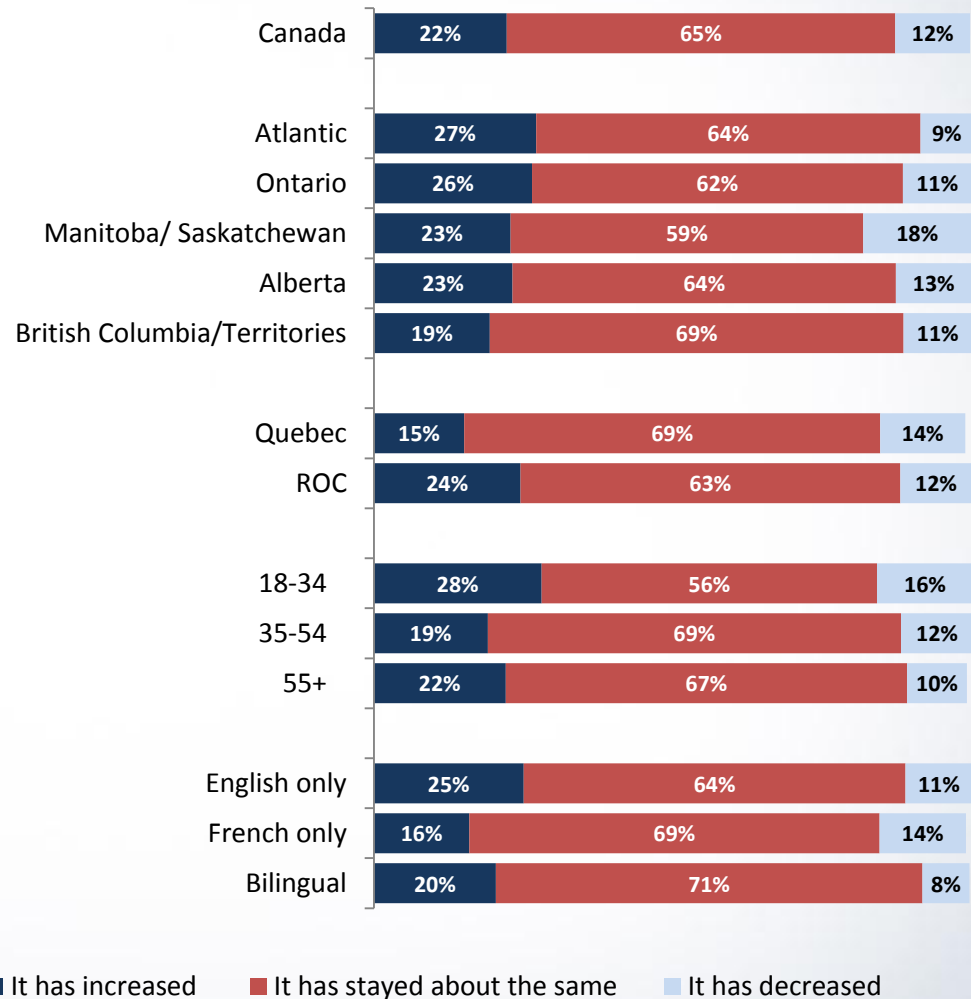
■ Yes (%)\*

\*Results are only shown for responses with values of at least 3%

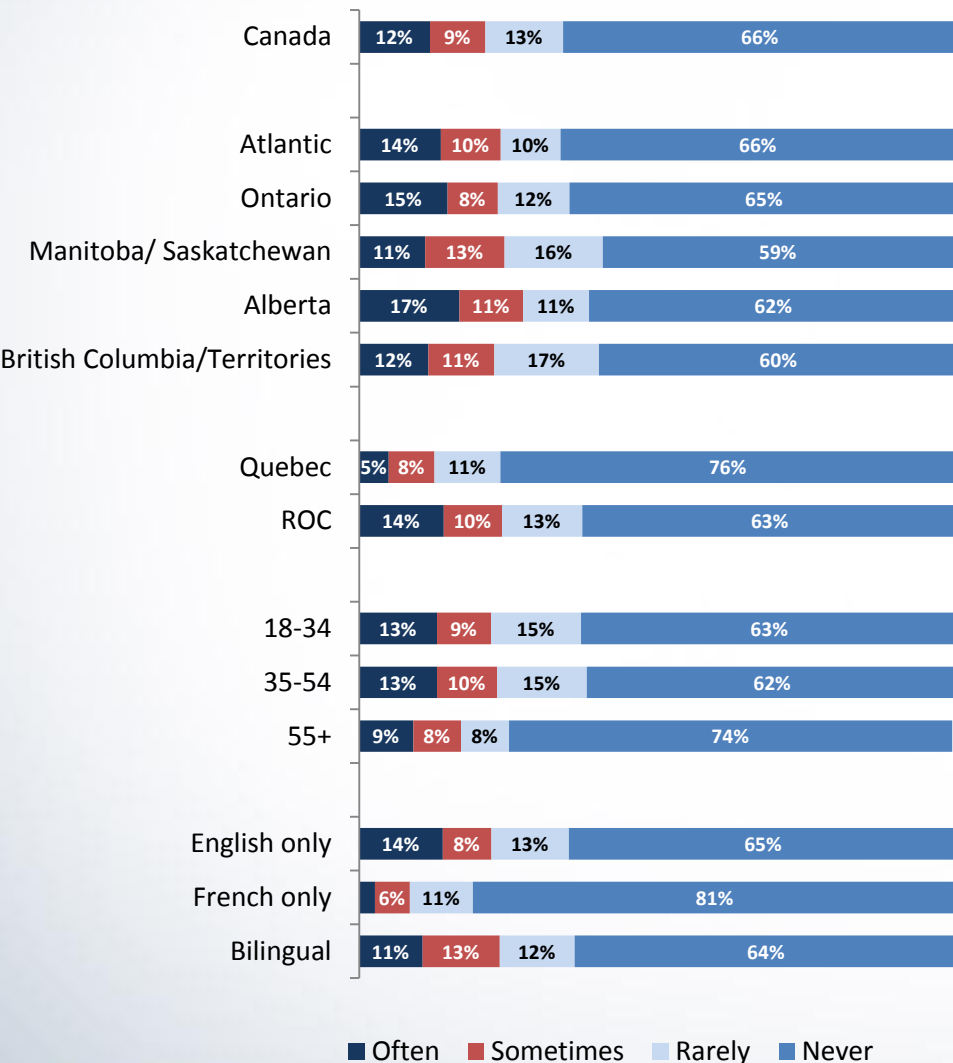
# Perceived Change in Book Readership Over the Past Year



- 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.
- Quebecers do not appear to be following this trend however when compared to residents in the Rest of Canada (ROC). While residents of Quebec are more likely to think their reading has remained the same, those in other provinces are more likely to say their reading has increased.
- Respondents 18 to 34 years old, social media networkers, and women are more likely to say their reading of books has increased over the past year. Their counterparts however, are not necessarily more likely to have reduced their leisure reading, they are just more likely to believe their book reading has remained the same.



# E-books

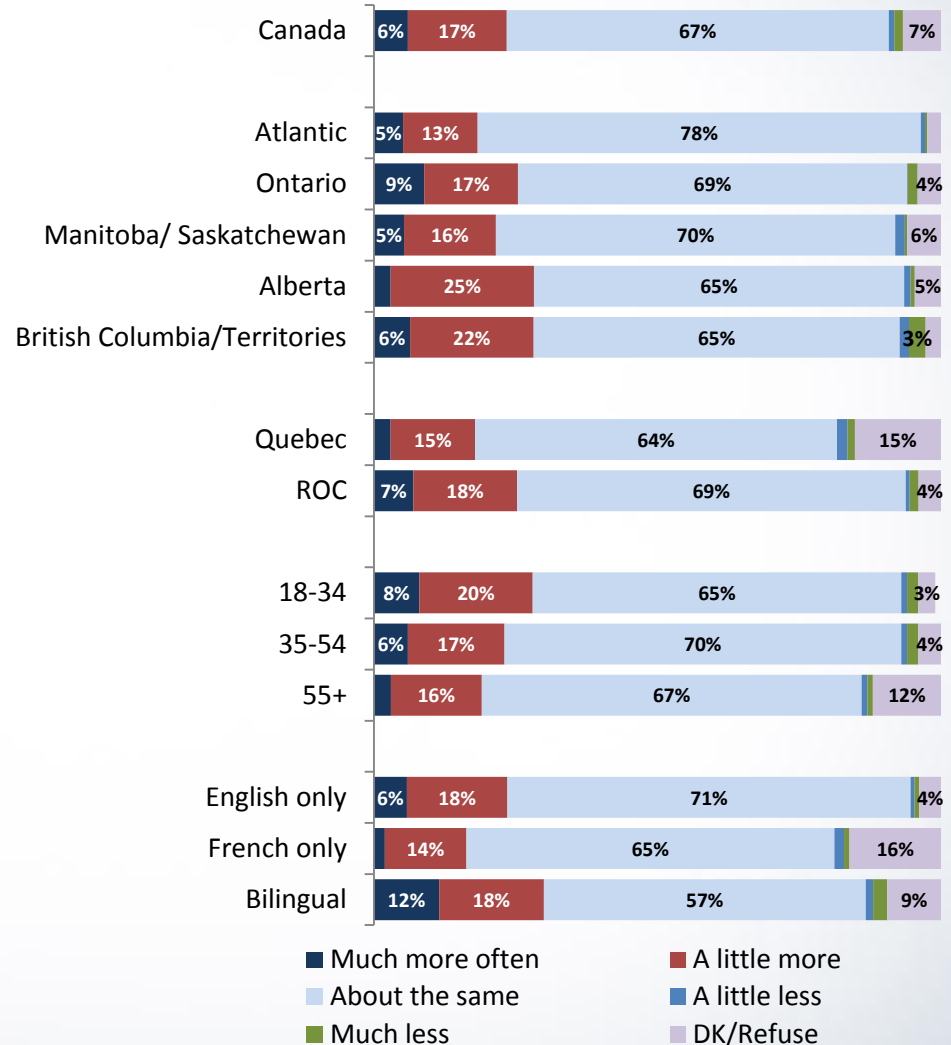


- One in five (21%) Canadians indicated they read e-books *often* or *sometimes*. Respondents in Quebec are the least likely to read e-books *often*, compared to residents of other provinces.
- Respondents with a university degree are more likely to read e-books than those with less education. Frequency of reading e-books also increases with household income.
- In terms of technology ownership, those with a dedicated e-book reader or a tablet are more likely to read e-books than those without these technologies.
- As well, social media networkers are more likely to read e-books compared to Canadians who do not use social networks.
- From a gender perspective, results show that women and men are equally likely to read e-books.

# Expected Shift in e-book Readership Over the Next 12 Months



- Based on this study, e-book reading will see a noticeable increase over the next 12 months. Nearly one fifth of Canadians (23%) believe their e-book reading is expected to increase over the next twelve months, while only 3% say it will decrease.
- Current e-book readers are more likely to say they will read e-books much more often twelve months from now, compared to those who currently do not read e-books (11% vs. 3% respectively).
- The expected increase in e-book readership will be especially high among Canadians under 55 years of age, bilingual respondents, and social media networkers.
- Just as women and men were equally likely to read e-books today, they are also showing very similar intentions when it comes to their expected reading of e-books twelve months from now.



# Devices Used to Read e-books



e-reader 37%



Desktop or laptop 31%



Tablet 28%



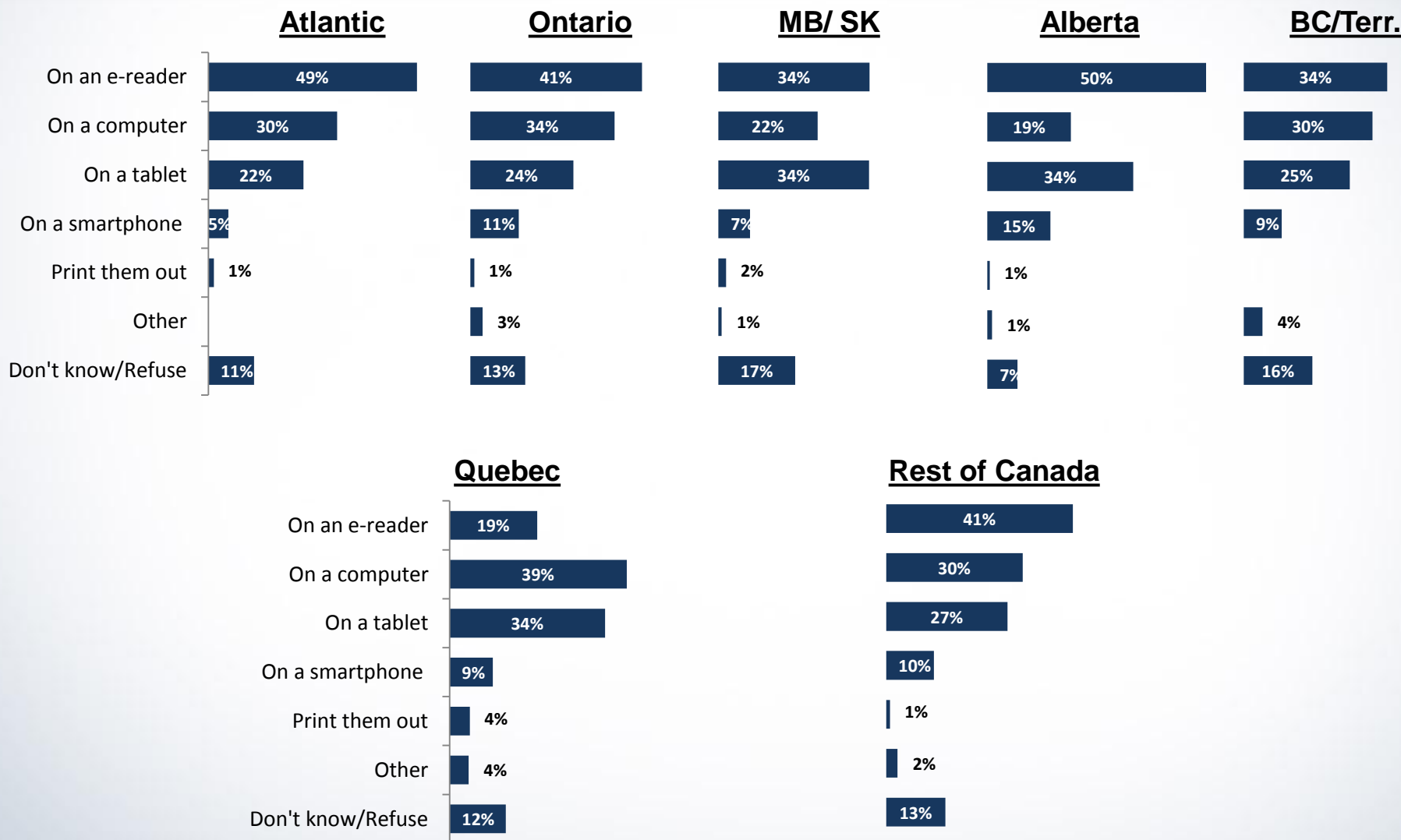
Smartphone 10%



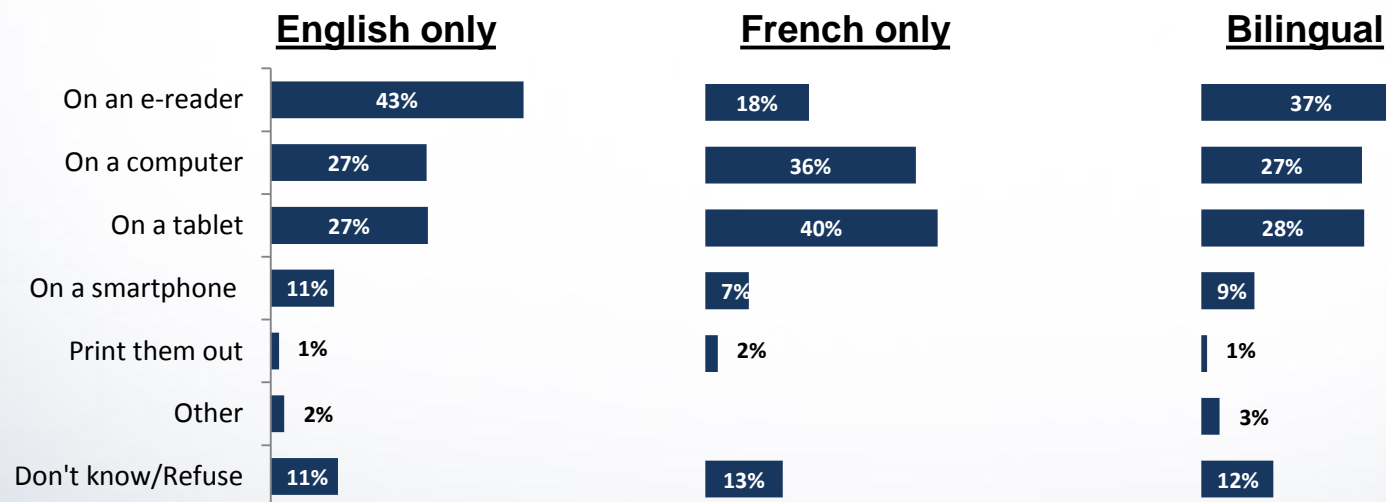
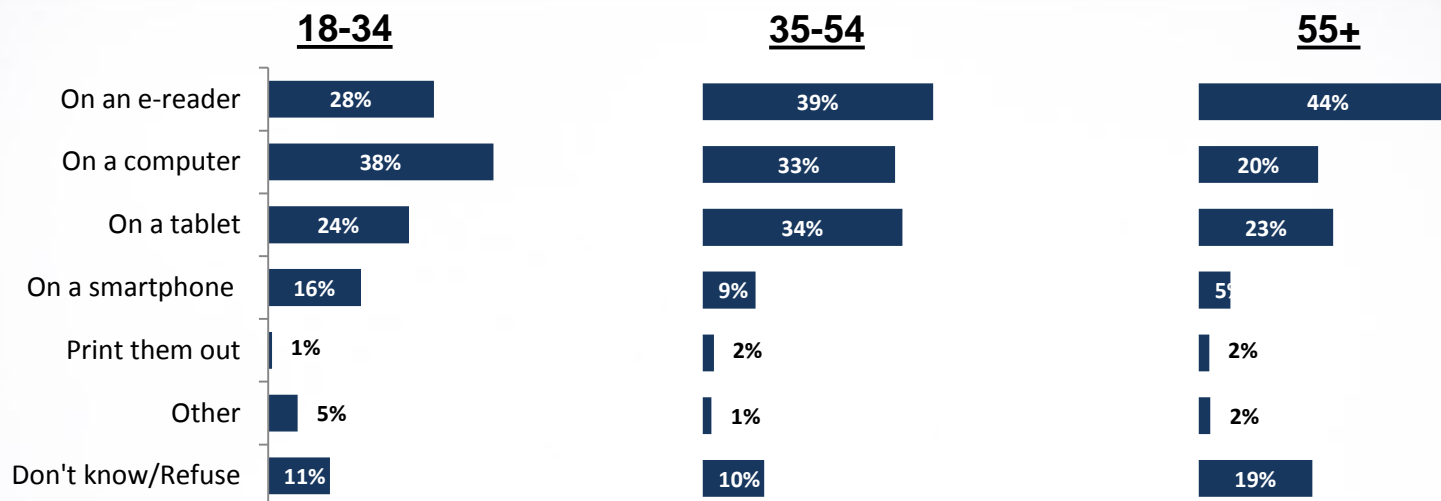
- E-books are read with an e-reader by nearly 4 in 10 e-book readers, while about 3 in 10 use a computer (desktop or laptop), and 28% use a tablet. Approximately 1 in 10 use a Smartphone to read their e-books.
- Less than 5% either print them or use other ways to read them such as an iPod or an iPod Touch.
- Finally, roughly 1 in 10 (13%) were unsure of the technology they typically use to read their e-books.

		
Print them out 1%	Other 3%	Don't know 13%

# Devices Used to Read e-books – By Region



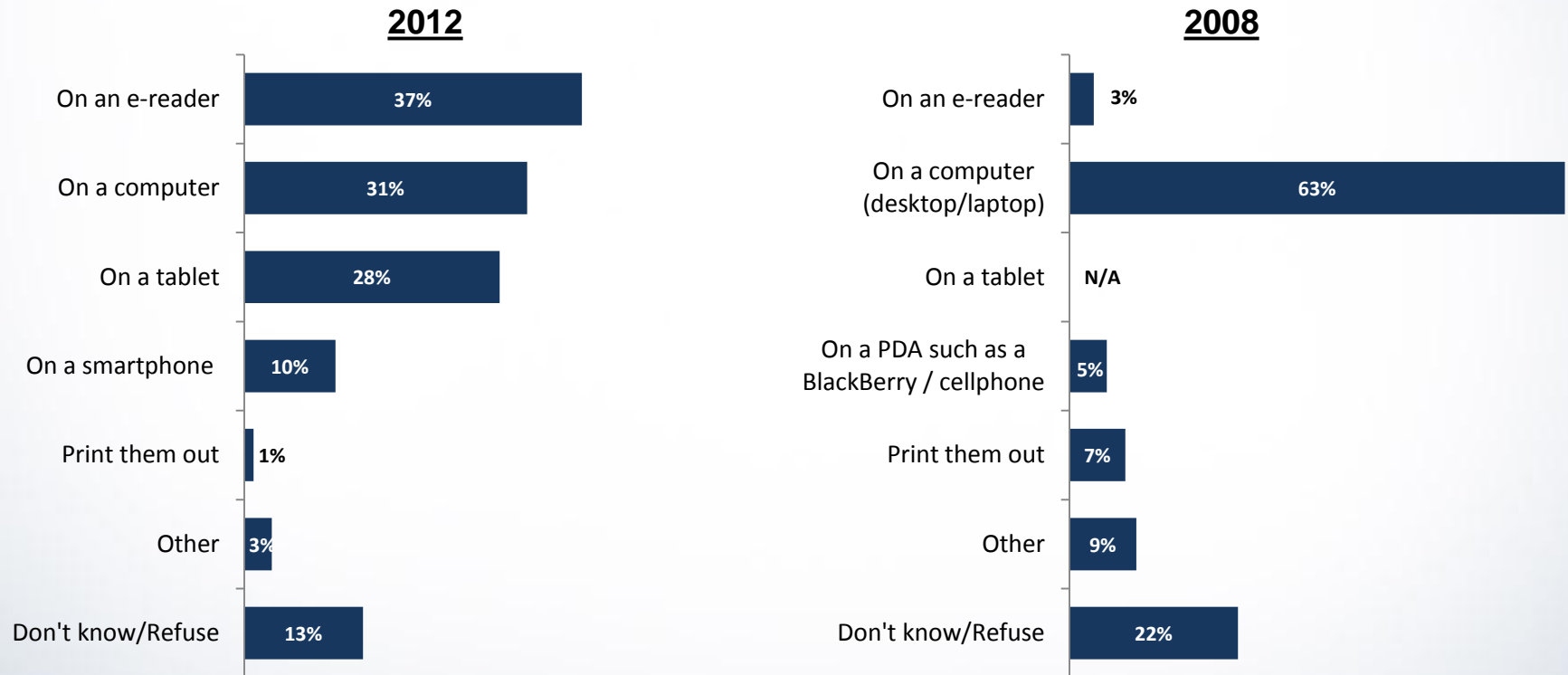
# Devices Used to Read e-books – By Age and Language Spoken at Home



# Devices Used to Read e-books – Comparative Analysis



The emergence of e-book readers and tablets has had an important impact on how e-books are consumed. Whereas Canadians were relying almost exclusively on a computer to read their e-books in 2008, they have now shifted their e-book reading to e-readers (37%) and to tablets (28%) as well as computers (31%). The growing popularity of smartphones and how these phones can be used has also made them another practical platform for reading e-books, as noted by 10% of Canadian e-book readers in 2012.

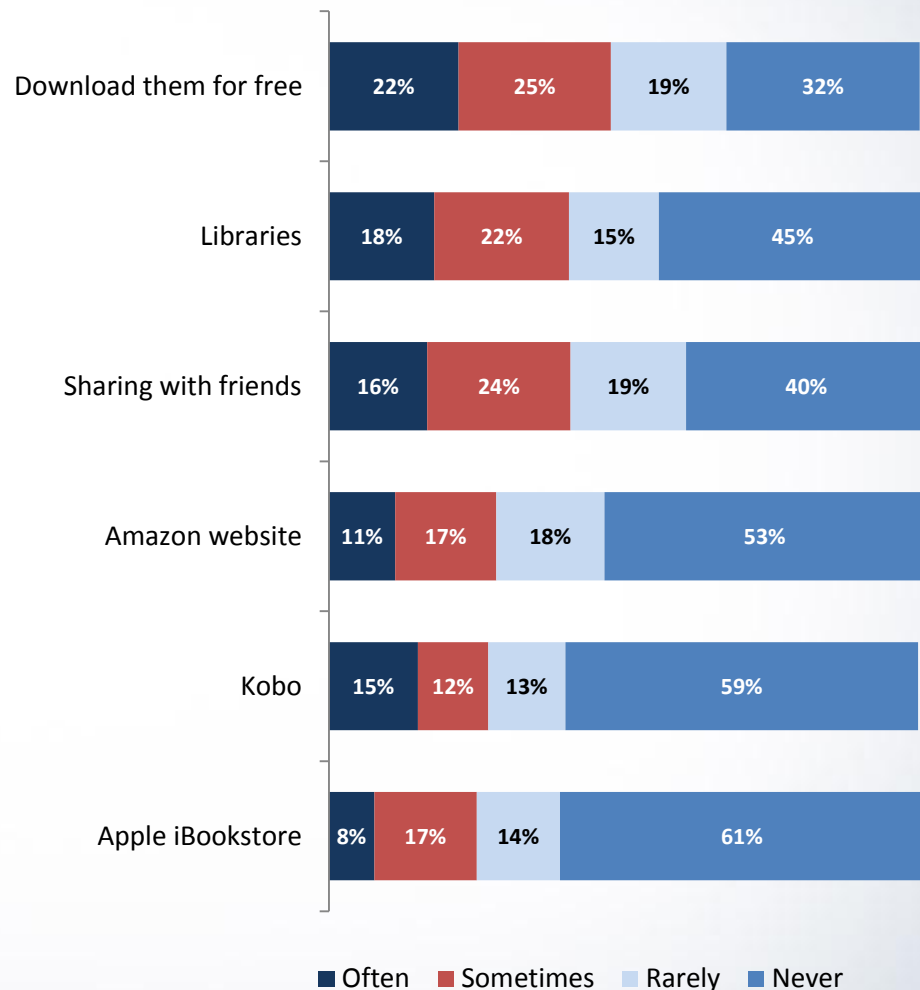




# How Canadians Obtain their e-books



- The most common way to obtain e-books among e-book readers is downloading them for free – 47% do this either *often* or *sometimes*.
- Four in ten respondents say they obtain e-books at libraries (40%) or by sharing with friends (40%).
- Roughly 1 in 4 respondents obtain e-books through the Amazon website (28%), Kobo (27%), or the Apple iBookstore (25%).
- Manitoba and Saskatchewan residents are more likely to say they *often* download e-books for free, while residents of Ontario, Alberta, and British Columbia/Territories are more likely to say they *sometimes* download them for free. Quebec residents are more likely to say they *never* download them for free.
- Respondents 18 to 34 years of age are more likely than those 35 to 54 years of age to say they obtain them *often* through libraries.



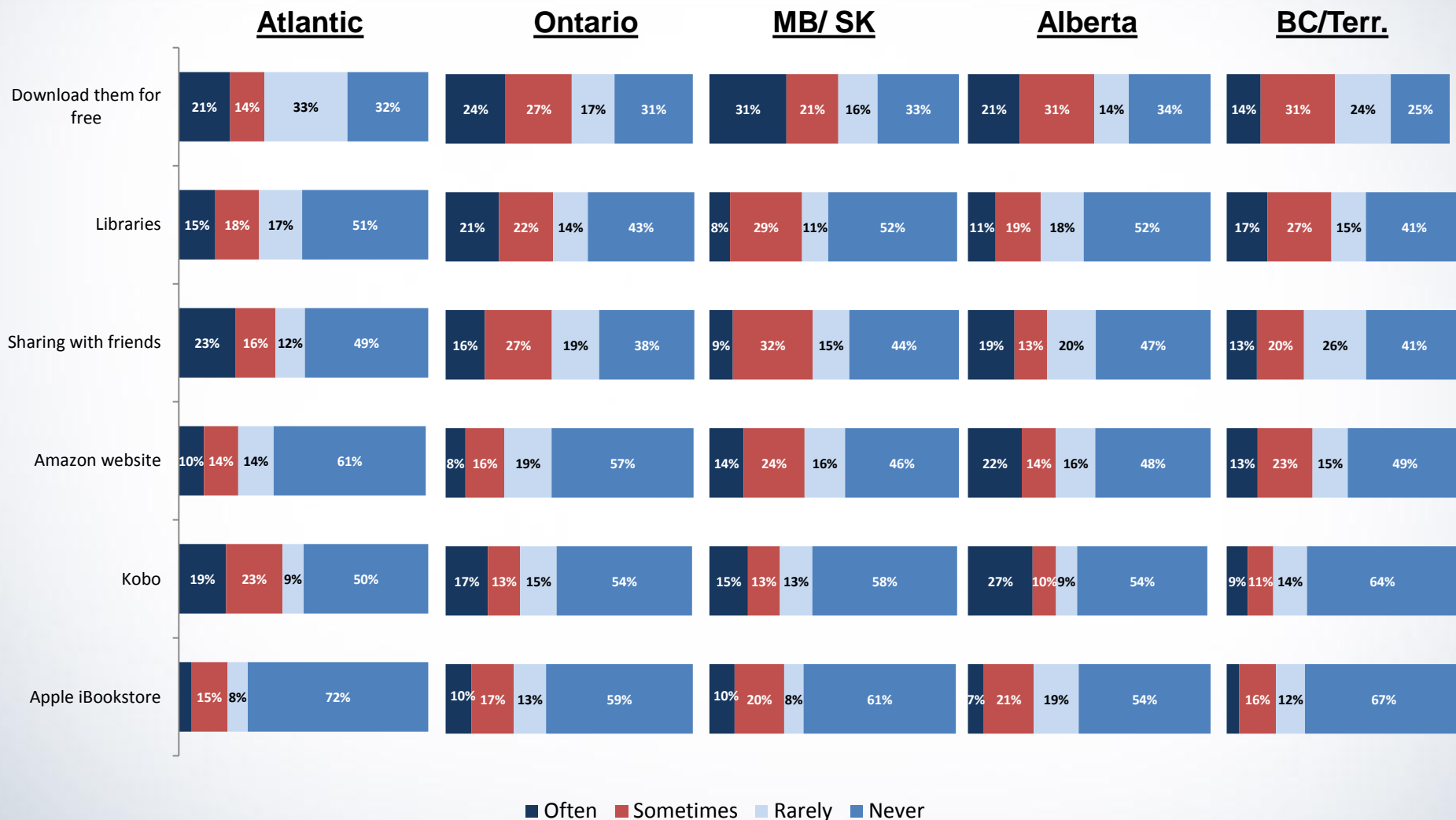
# How Canadians Obtain their e-books



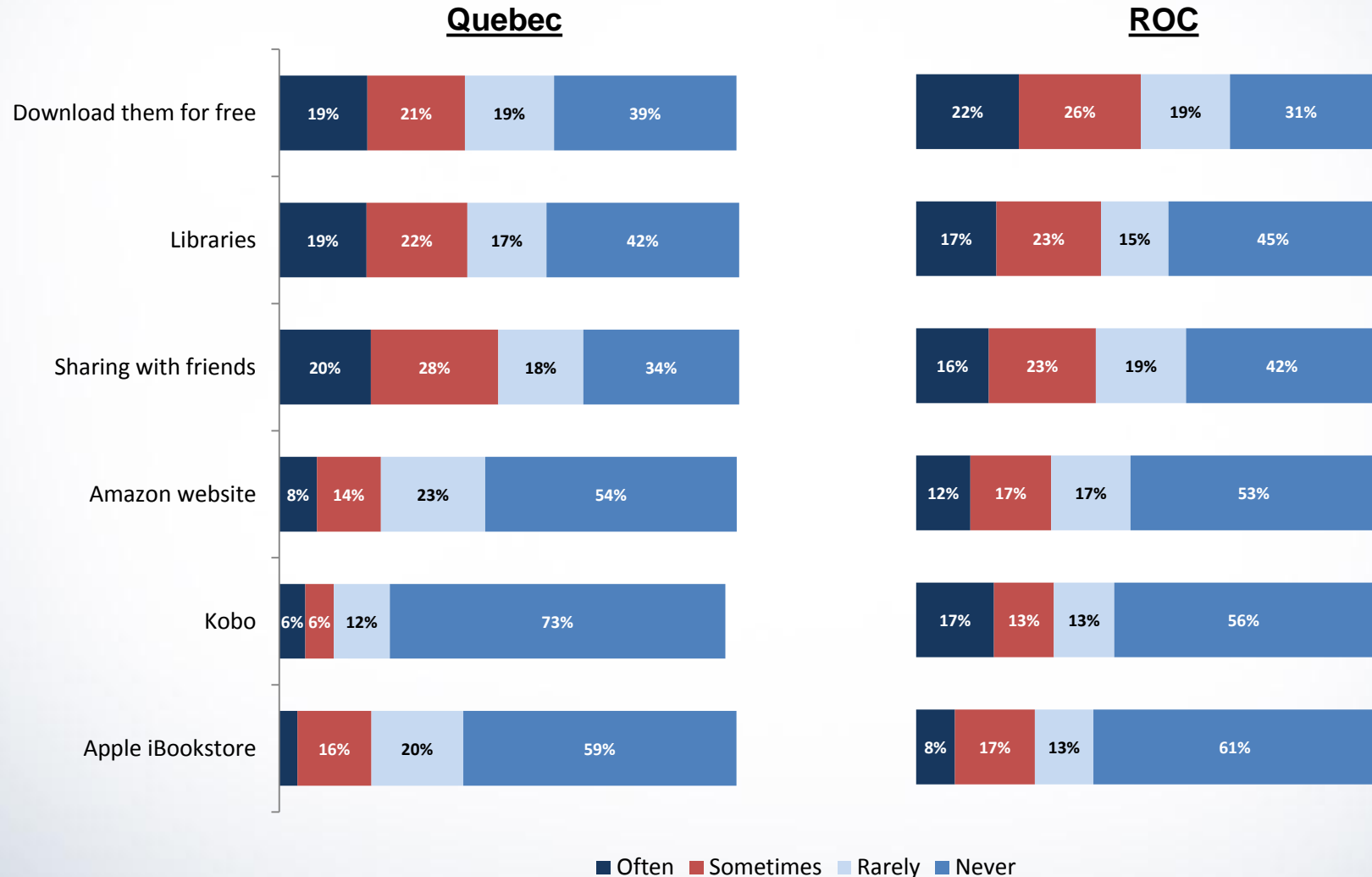
Noteworthy sub-group differences related to online e-book stores include the following:

- Quebec residents are the most likely to say they *never* obtain e-books through Kobo compared to residents from the rest of Canada. Respondents who speak only English at home are more likely than those who speak only French at home or both languages to say they *often* obtain their e-books through Kobo. Similarly, those with an e-book reader are more likely to say they *often* obtain their e-books through Kobo.
- Respondents with a household income of over \$100K are more likely than those with a household income under \$60K to say they *often* obtain their e-books through the Amazon website. Similarly, those with an e-book reader are more likely to say this.
- Residents outside of Quebec are more likely to say they *often* obtain their e-books through the iBookstore, compared to Quebec residents. Similarly, respondents with a smartphone or a tablet are more likely to say they *often* or *sometimes* obtain their e-books through the iBookstore.

# How Canadians Obtain their e-books – by Region



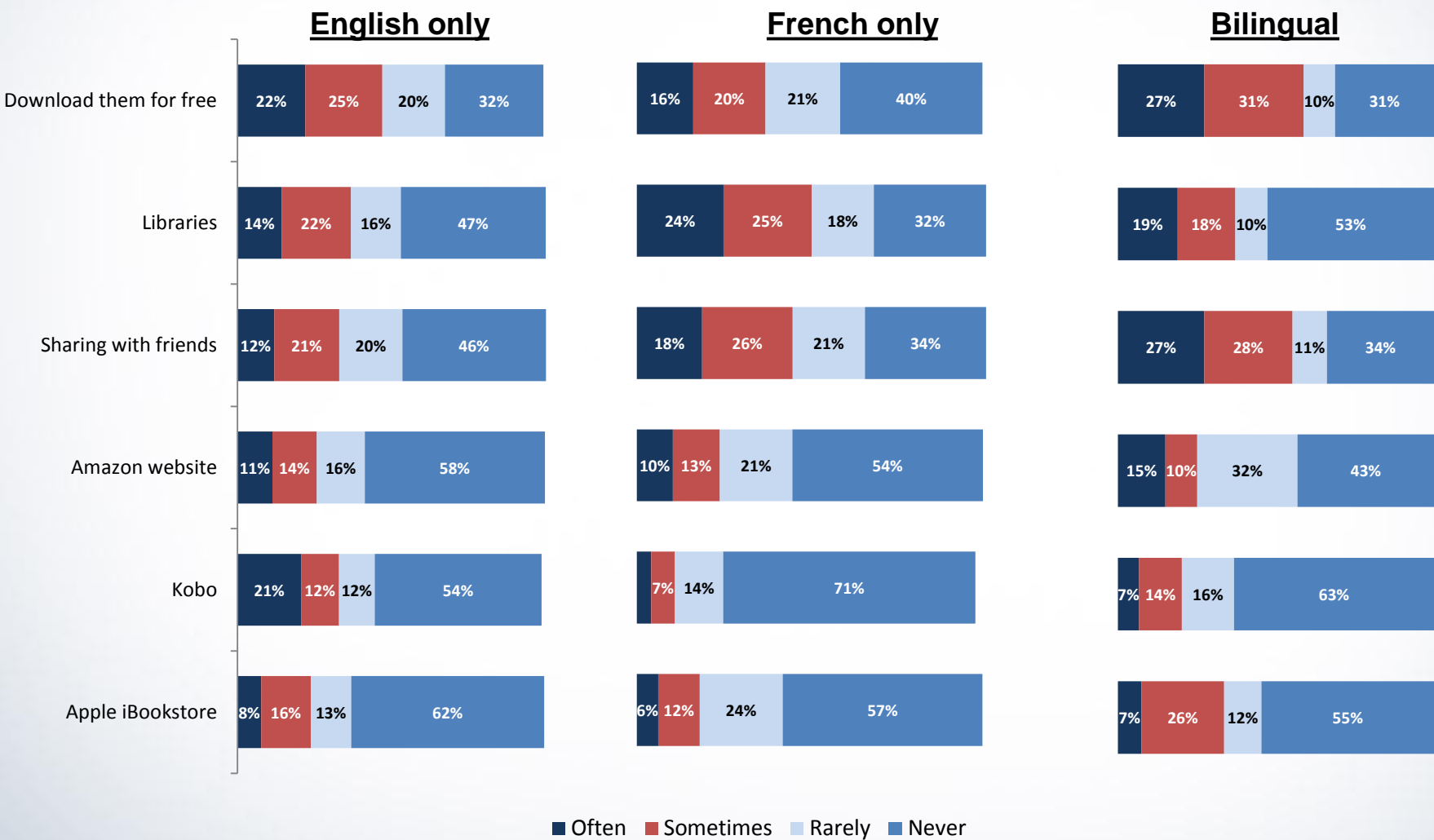
# How Canadians Obtain their e-books – by Region



# How Canadians Obtain their e-books – by Age



# How Canadians Obtain their e-books – by Language Spoken at Home

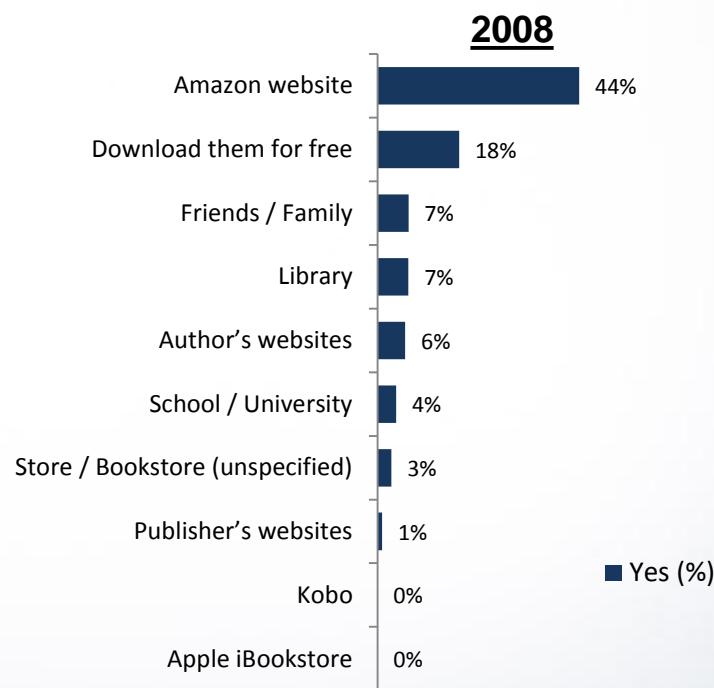
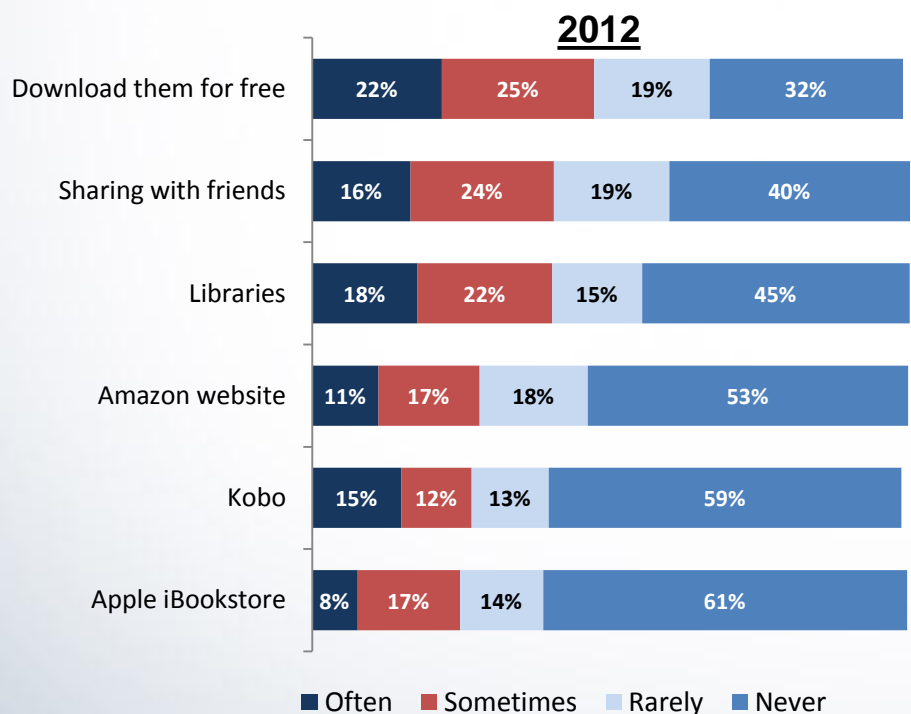


# How Canadians Obtain their e-books – Comparative Analysis

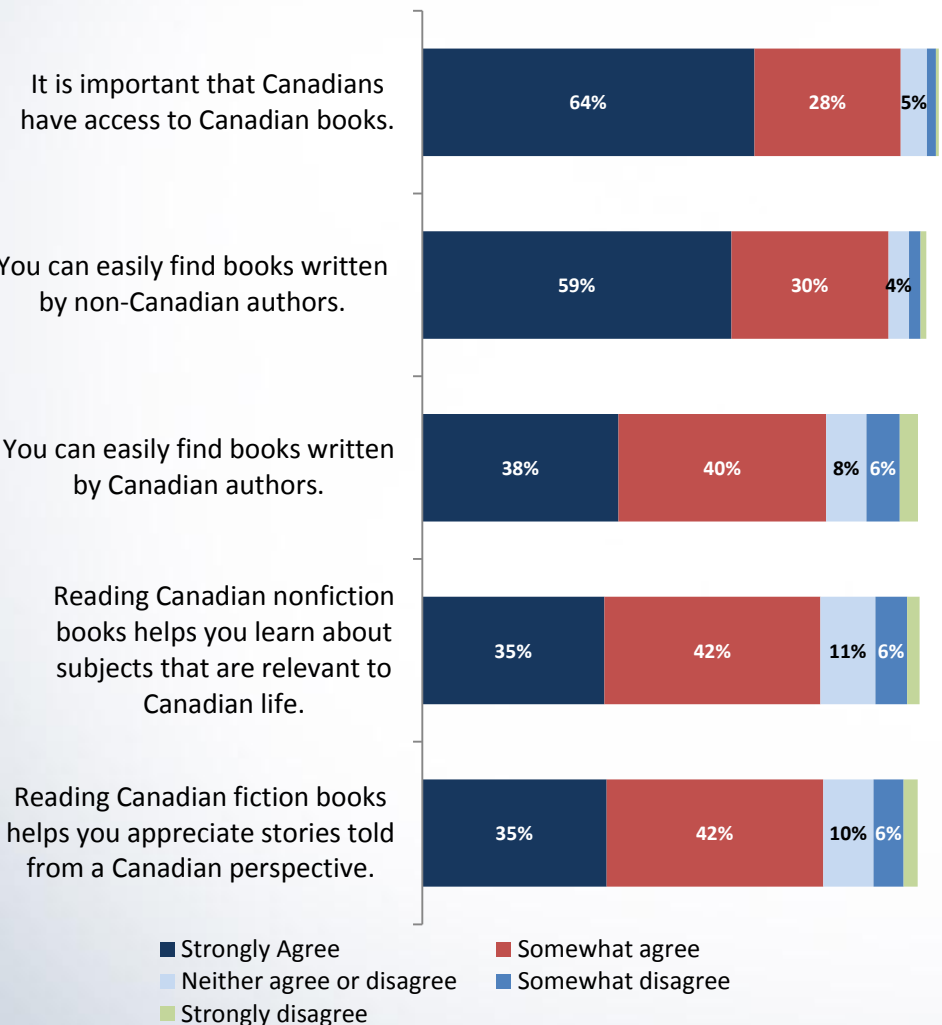


This comparative analysis involves different methodologies. The 2008 and 2012 data below is intended to illustrate a trend, but cannot be directly compared.

To understand how Canadians obtain their e-books, a prompted, scale-based approach was used in 2012 whereas an unprompted, open-ended approach was used in 2008. While the results cannot be directly compared since prompted questions will almost always elicit higher results than unprompted ones, there are a few trends that can be highlighted. First, the emergence of tablets and e-readers since 2008 has had a significant impact on where Canadians obtain their e-books. Downloading them for free has become the most common way Canadians obtain their e-books, followed by sharing them with friends and getting them from libraries. As for Amazon, which was the primary website used in 2008, it is now as popular as other virtual bookstores such as Kobo and the Apple iBookstore.



# Canadian Books and Canadian Culture



- 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.
- Approximately 9 in 10 agree it is important that Canadians have access to Canadian books (92%).
- In terms of accessibility, 78% believe that it is easy to find books written by Canadian authors, while a somewhat higher proportion believe it is easy to find books written by non-Canadian authors, at 89%.
- Over 3 in 4 respondents agree 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%).

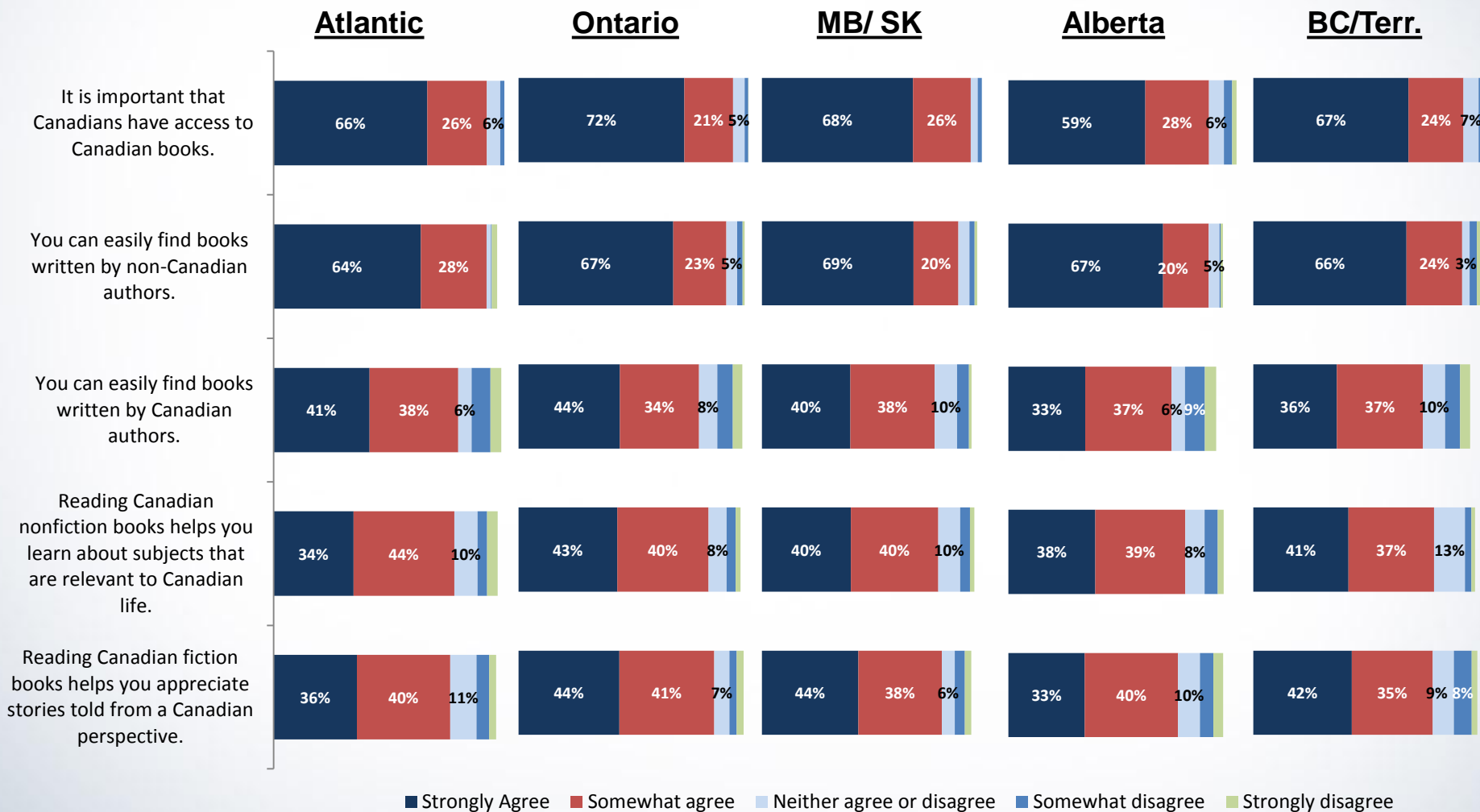




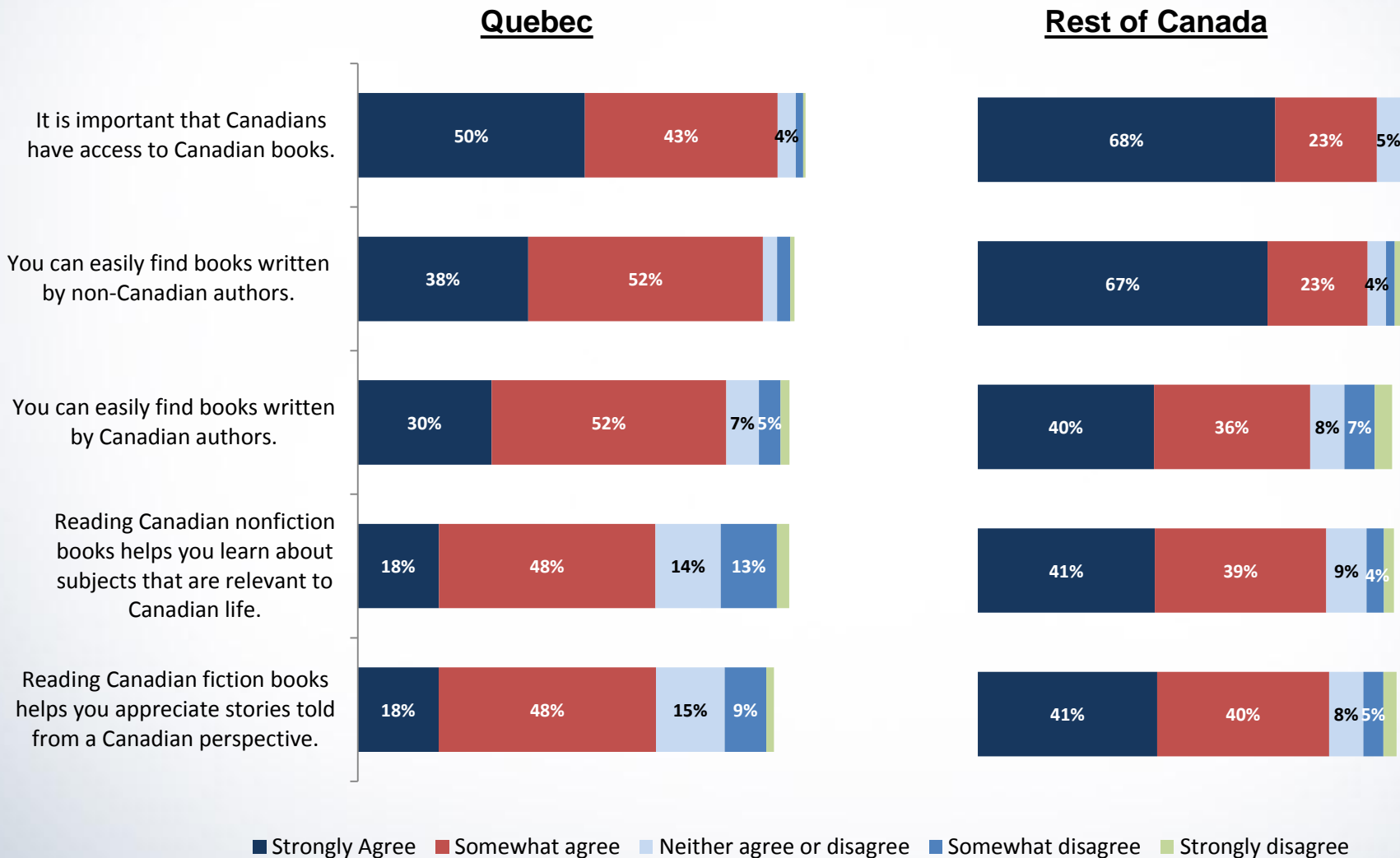
Other sub-group results of interest include the following:

- Residents of Quebec, Ontario, Manitoba and Saskatchewan are most likely to agree it is important that Canadians have access to Canadian books. In addition, women are more likely than men to agree with this statement.
- Those who own an e-book reader, a tablet or who are social media networkers are more likely to agree it is easy to find books written by non-Canadian authors compared to those who do not own these technologies.
- Quebec residents (and those who speak only French at home) are more likely than the rest of Canada (and those who speak only English at home) to agree it is easy to find books written by Canadian authors.
- E-book owners (82%), tablet owners (77%) and social media networkers (78%) are just as likely to agree that it is easy to find books written by Canadian authors as the average Canadian household (78%).
- As well, e-book owners (94%), tablet owners (93%) and social media networkers (91%) are just as likely to agree that it is easy to find books written by non-Canadian authors as the average Canadian household (89%).

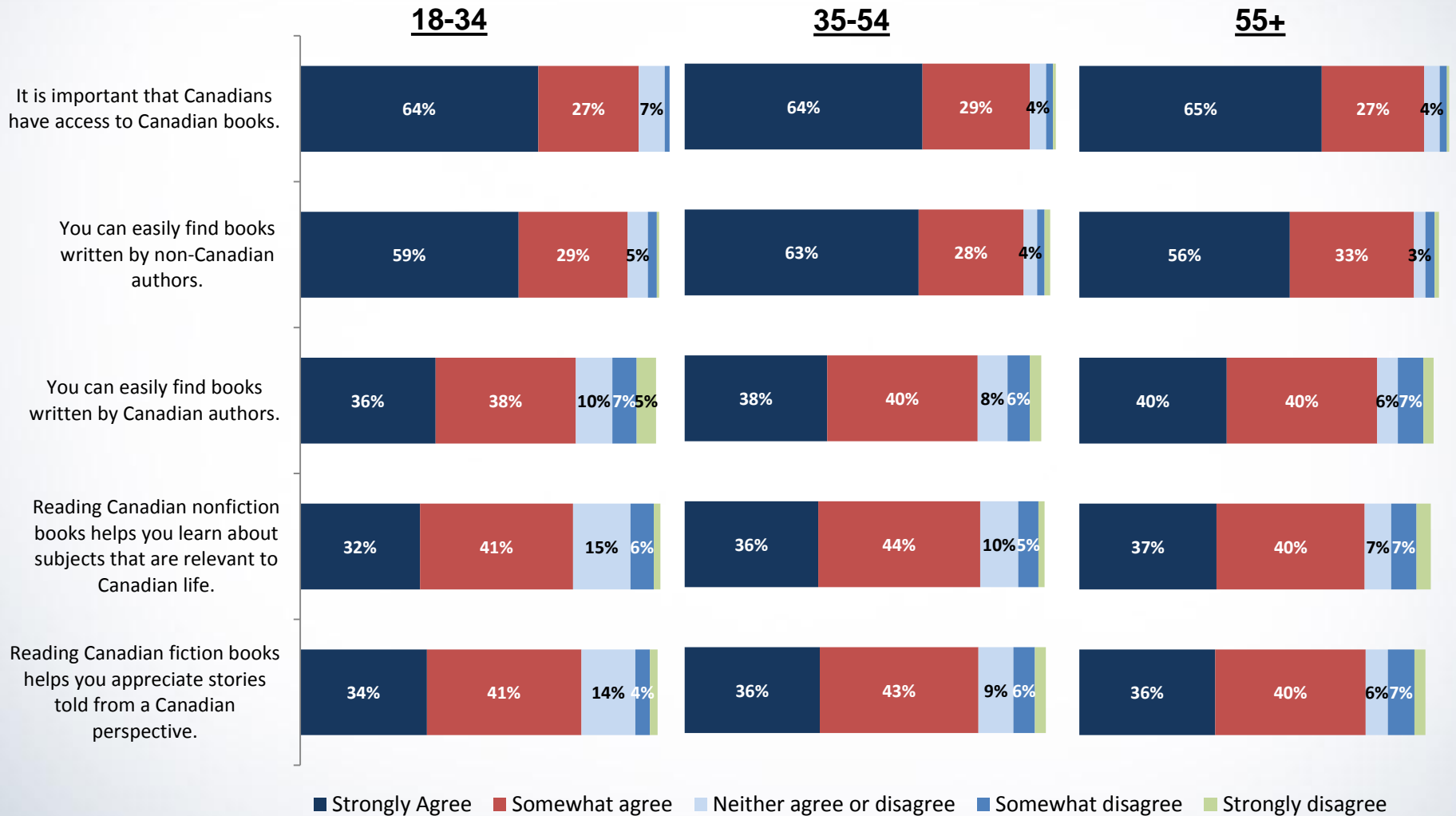
# Canadian Books and Canadian Culture – by Region



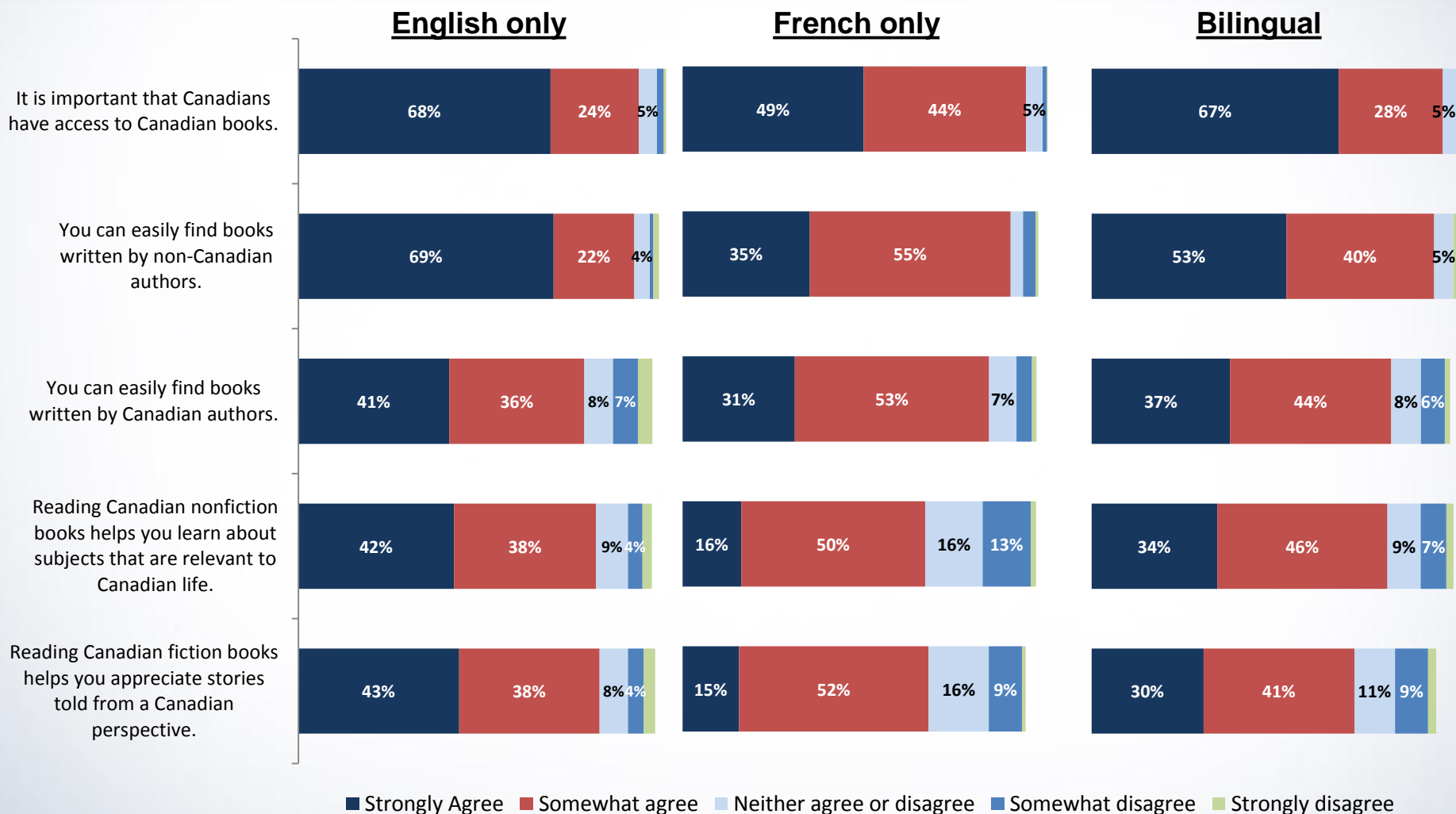
# Canadian Books and Canadian Culture – by Region



# Canadian Books and Canadian Culture – by Age



# Canadian Books and Canadian Culture – by Language Spoken at Home

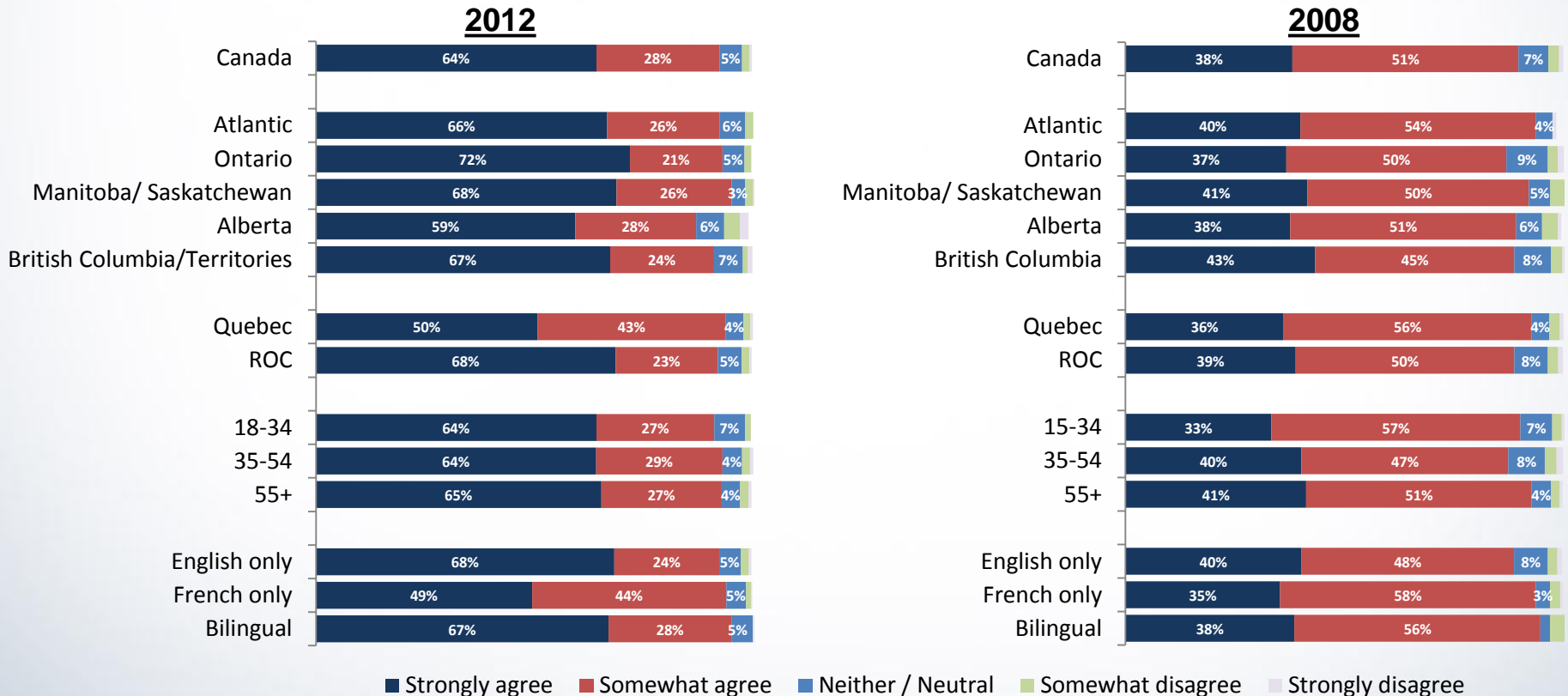


# Canadian Books and Canadian Culture – Comparative Analysis



Canadians continue to believe that it is important that Canadians have access to Canadian books. What is noteworthy about the 2012 findings is that Canadians now feel more strongly about this sentiment than they did in 2008, as seen by the percent who *strongly agree* with the statement. In fact, it is nearly twice as high as in 2008. This increased sense of importance is equally shared across the key regional and demographic segments, and is particularly noteworthy among respondents in the Rest of Canada.

*“It is important that Canadians have access to Canadian books.”*

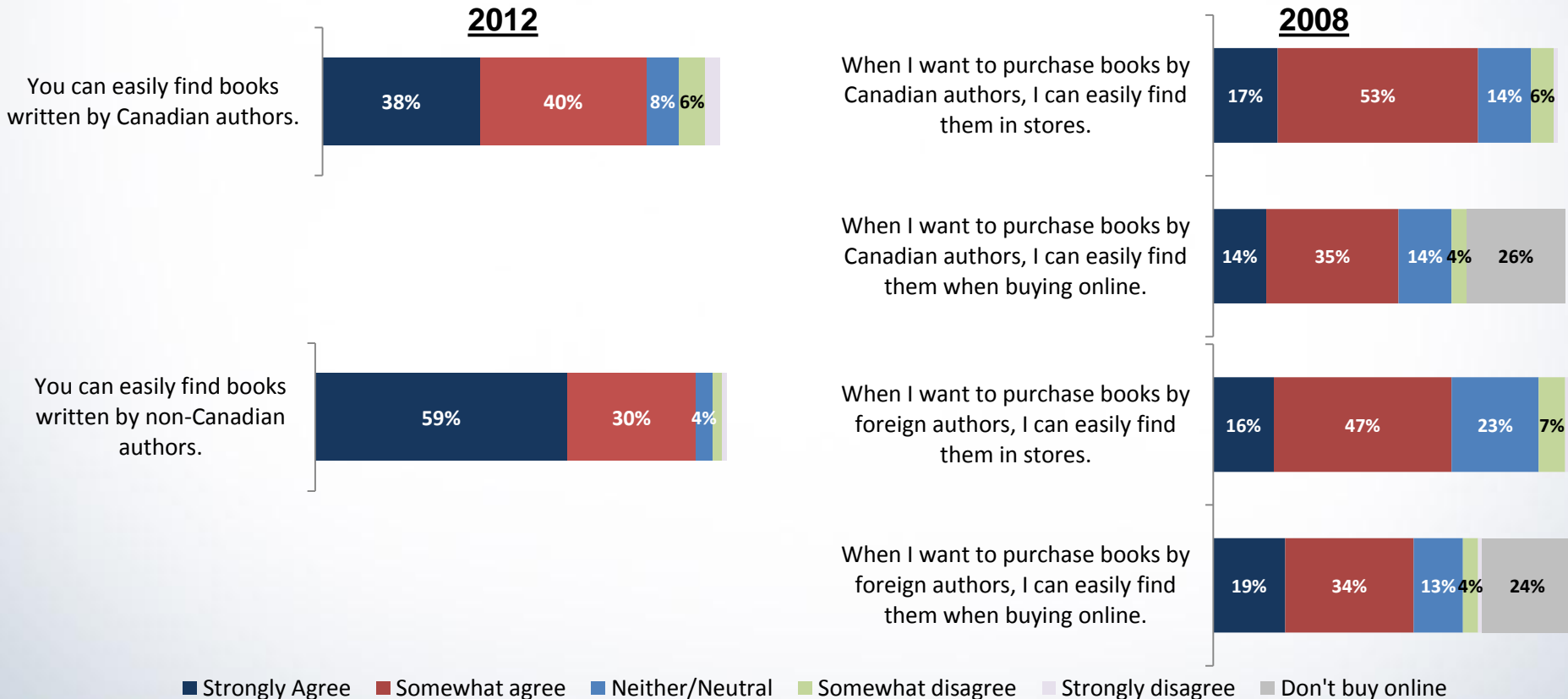


# Canadian Books and Canadian Culture – Comparative Analysis



Canadians were asked a few questions related to accessibility of Canadian and non-Canadian books. The approach used in 2012 was not specific in terms of distribution channel whereas the 2008 questions distinguished between buying in stores and online.

Few in 2008 expressed difficulty in trying to find Canadian books either in stores or online and a similar conclusion can be made in 2012 where over three-quarters (78%) of Canadians agree that they can easily find books written by Canadian authors. What is noteworthy when comparing the two studies is that Canadians in 2012 seem to feel they can more easily find books by non-Canadians than books by Canadians, a distinction that was not evident in 2008.



# Feature Film



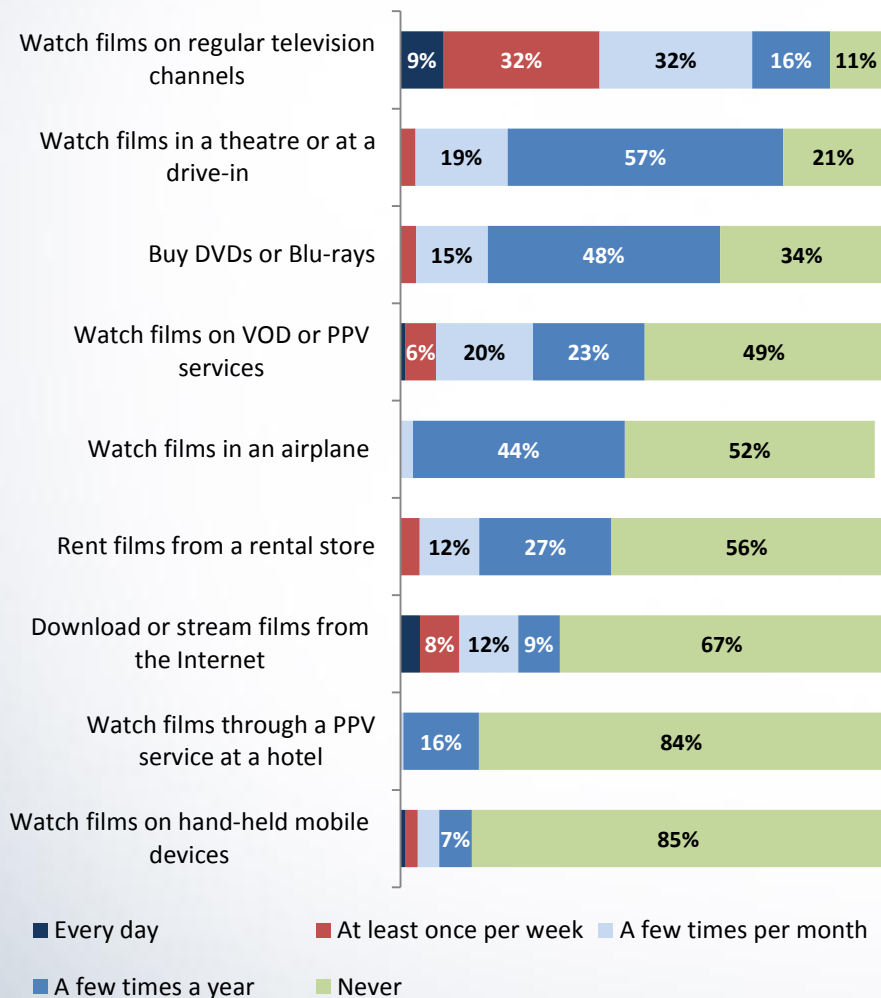
Canadian  
Heritage

Patrimoine  
canadien





# How Canadians Watch Films



- The most common way respondents watch films is on regular television channels (89%).
- Movie theatres and drive-ins are the second most popular way of watching films (79%), although the majority of Canadians only do this a few times a year (57%).
- Two thirds (66%) buy films on DVD or Blu-ray format (again, mostly only a few times a year). 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, in an airplane using the onboard entertainment system, or rent films from a rental store.
- One respondent in three or less say they download or stream films from the internet, watch films through a PPV service at a hotel, or on a hand-held mobile device. It is worth noting however that 12% of Canadians download or stream films from the Internet either every day or at least once per week, making it the second most common platform when considering these two response categories.

# How Canadians Watch Films



Not all Canadians watch films the same way – this research shows that the manner in which films are watched may vary across many viewer characteristics such as their province, age, language, and other demographic variables.

- For instance, compared to other regions, Albertans are relatively more likely to use platforms such as VOD or PPV services, the onboard entertainment systems on airplanes, or a hand-held device. They are also the most likely to download or stream films from the Internet at least once a week. Ontarians and Quebecers on the other hand are more likely than individuals in other regions to use more traditional ways to watch films; for example, Ontarians are more likely to buy DVDs and Blu-rays, while Quebecers are more likely to rent films from a rental store.
- In terms of age, respondents under 55 years of age are more likely than older respondents to buy DVDs and Blu-rays, watch films on VOD or PPV services, on an airplane, or rent films from a rental store. Moreover, the younger they are, the more likely Canadians are to download or stream films.
- Respondents who speak only French at home are more likely to say they *never* download or stream films from the Internet, watch a film using a hand-held device, or on an airplane. On the other hand, they are more likely to say they rent films from rental stores.
- Respondents without a university education, and those with a household income under \$40K are more likely to say they watch films every day on regular television channels.
- Residents of urban areas, with at least college education (or CEGEP in Quebec), earning at least a \$40K household income, social media networkers, bilingual, or younger respondents are more likely to watch films in a theatre or a drive-in.

# How Canadians Watch Films – by Region



## Atlantic

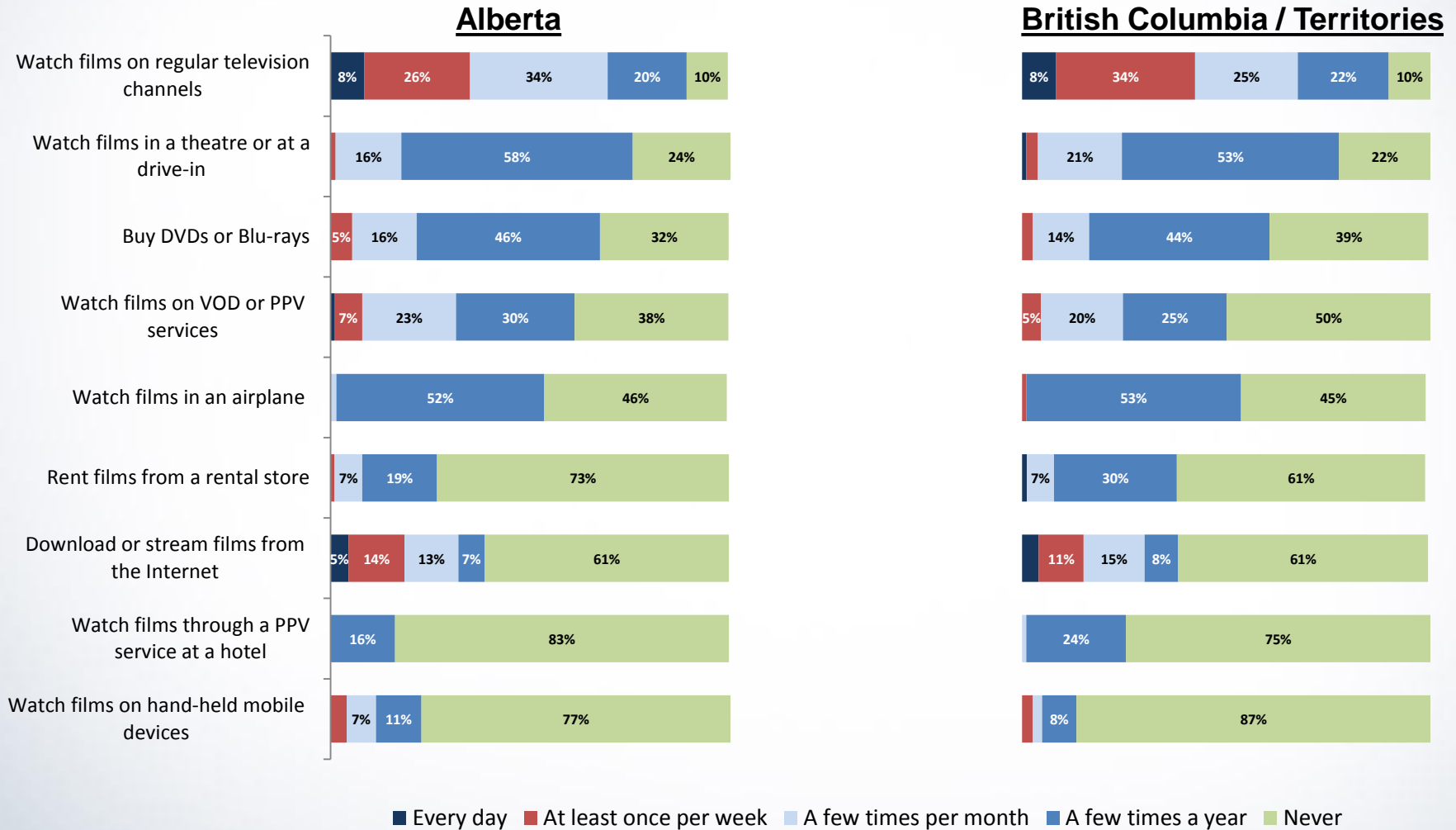
## Ontario

## Manitoba/ Saskatchewan

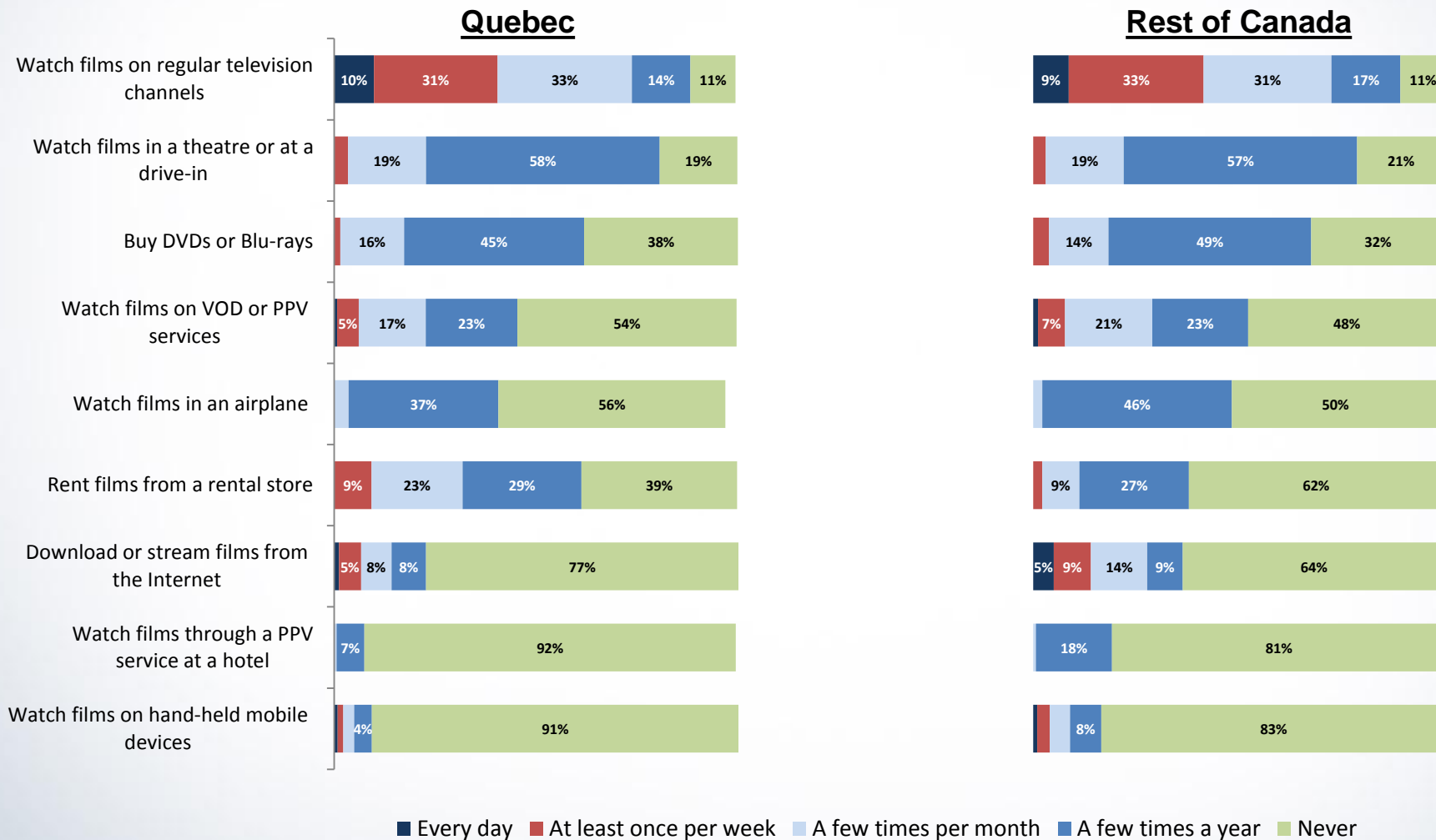


■ Every day 
 ■ At least once per week 
 ■ A few times per month 
 ■ A few times a year 
 ■ Never

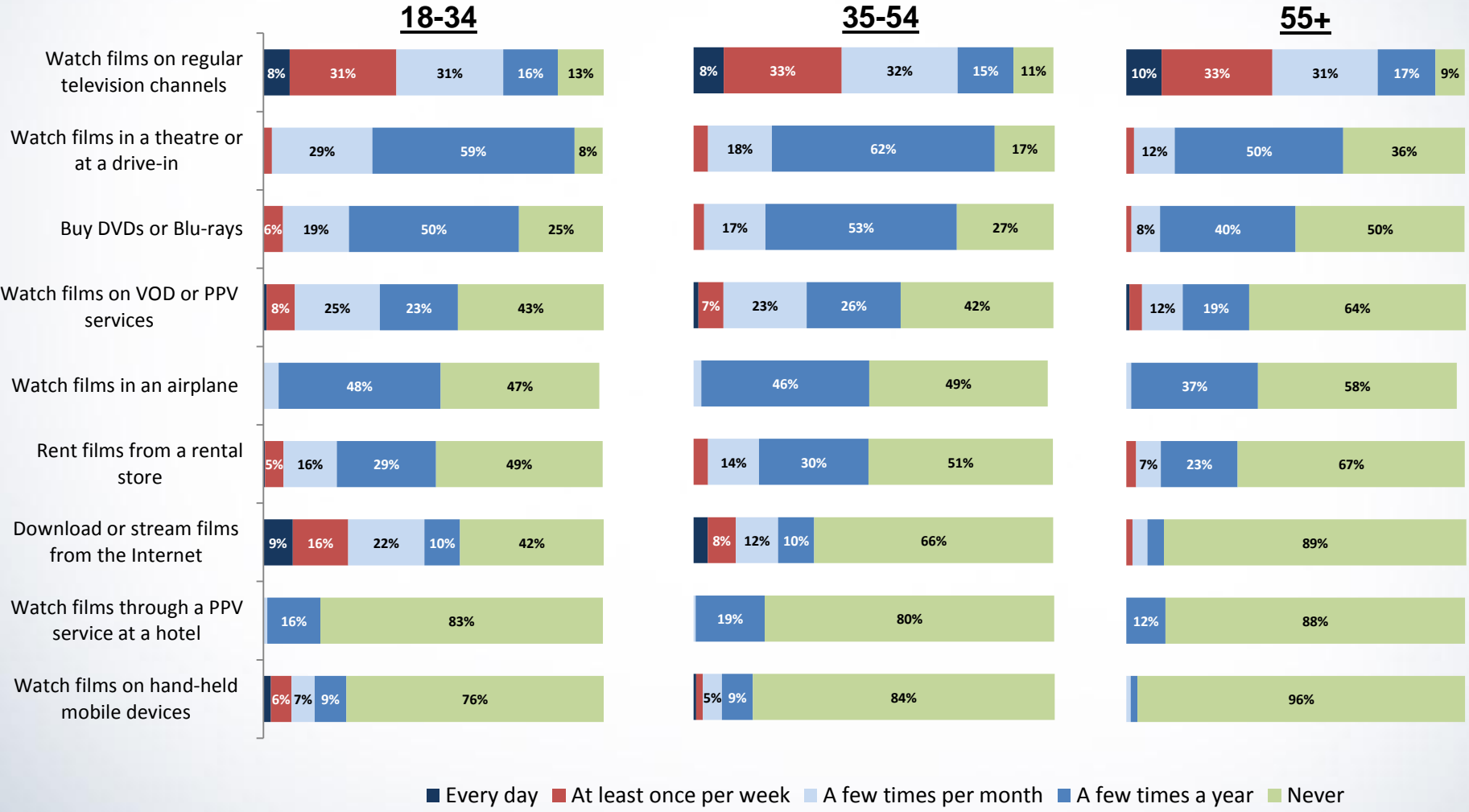
# How Canadians Watch Films – by Region



# How Canadians Watch Films – by Region



# How Canadians Watch Films – by Age



■ Every day 
 ■ At least once per week 
 ■ A few times per month 
 ■ A few times a year 
 ■ Never

# How Canadians Watch Films – by Language Spoken at Home



## English only

## French only

## Bilingual



# How Canadians Watch Films – Comparative Analysis



The comparative analysis for the feature film data is the only one to involve results dating back to 2005. Given the longer lapse between studies, shifts in technology usage will likely be larger, thereby resulting in potentially larger impacts on feature film consumption.

To measure how often Canadians use different platforms or technologies to view films, a simplified scale was used in 2012 compared to the more granular scale used in 2005. Despite the change in scale, trends can be observed over the seven years since the study was last conducted. Some of the more noteworthy trends suggest the following:

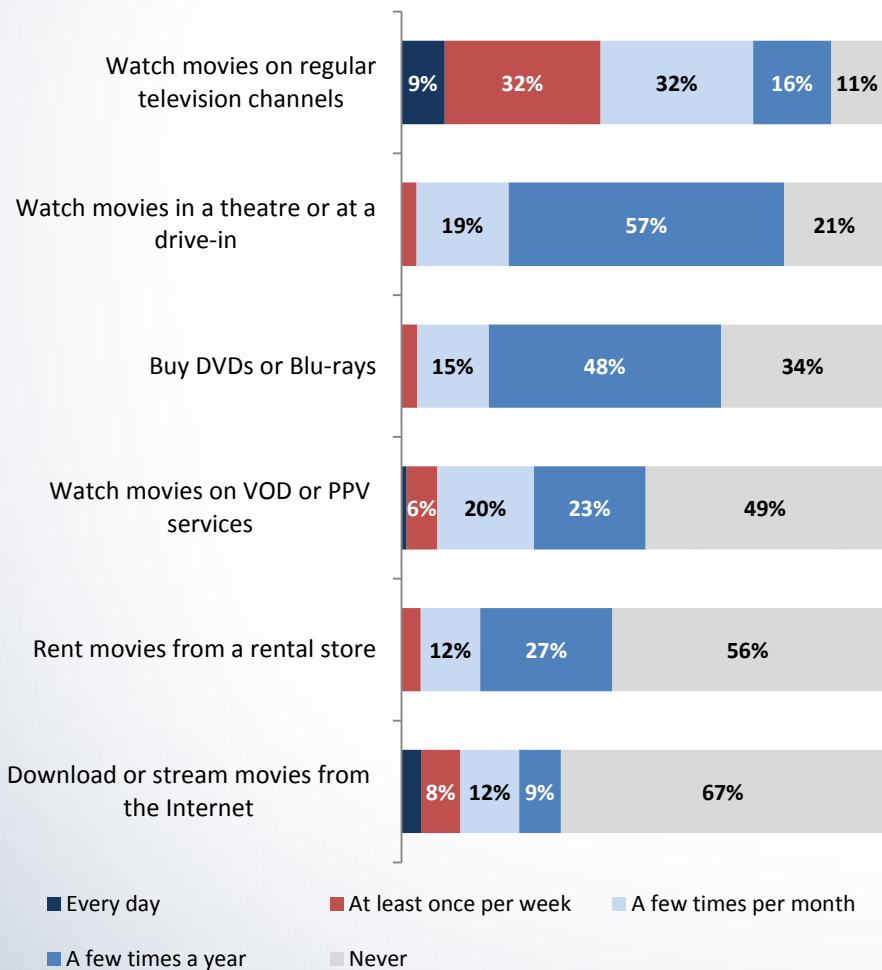
- The frequency at which Canadians go to movie theatres or drive-ins and at which they purchase DVDs and Blu-rays seems to have remained relatively stable.
- The results point to an important drop in the use of video rental stores among Canadians – whereas about 80% of Canadians did this at least once a year in 2005, this is now closer to 44%.
- Watching movies on VOD or PPV has seen a significant increase compared to 2005 – whereas 18% of Canadians did this in 2005, this has increased to 50% in 2012.
- Another activity that has become much more common is downloading or streaming movies from the Internet – an activity that has more than tripled among Canadians – whereas roughly 8% did this in 2005, this has now climbed to 33% in 2012. Not only are more Canadians viewing film this way, they are also doing it much more often than before.



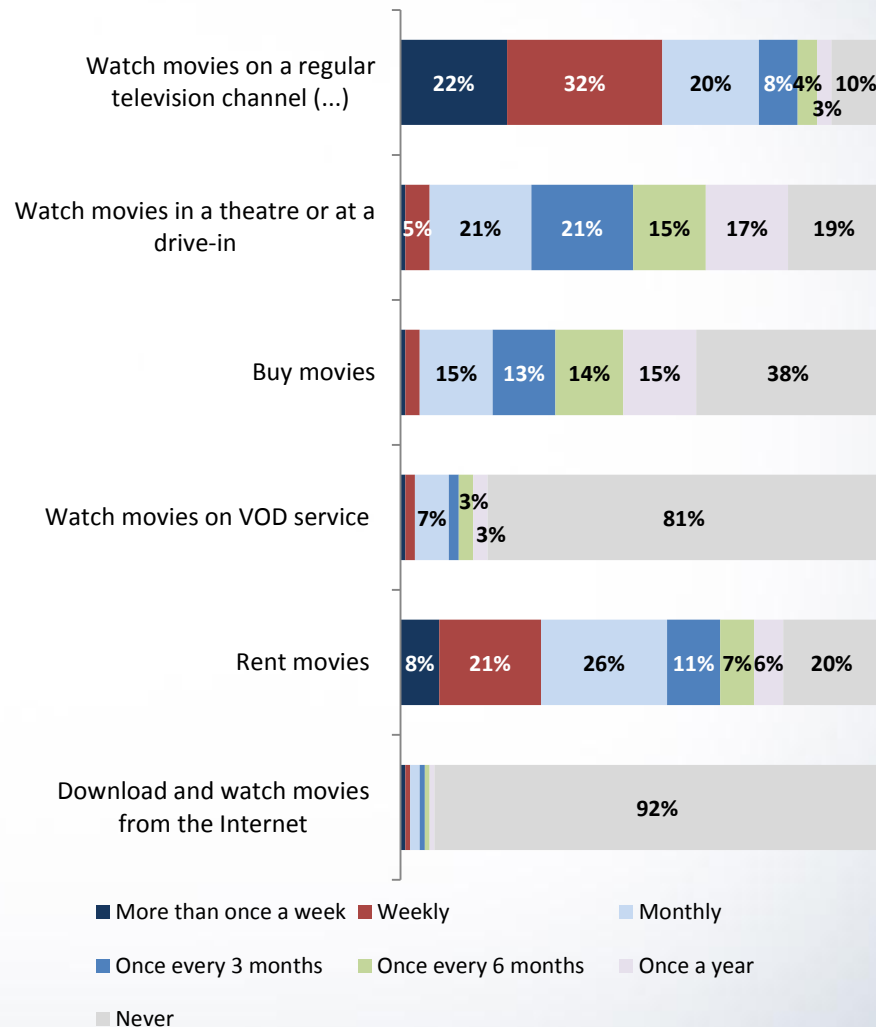
# Comparative Analysis – Feature Film



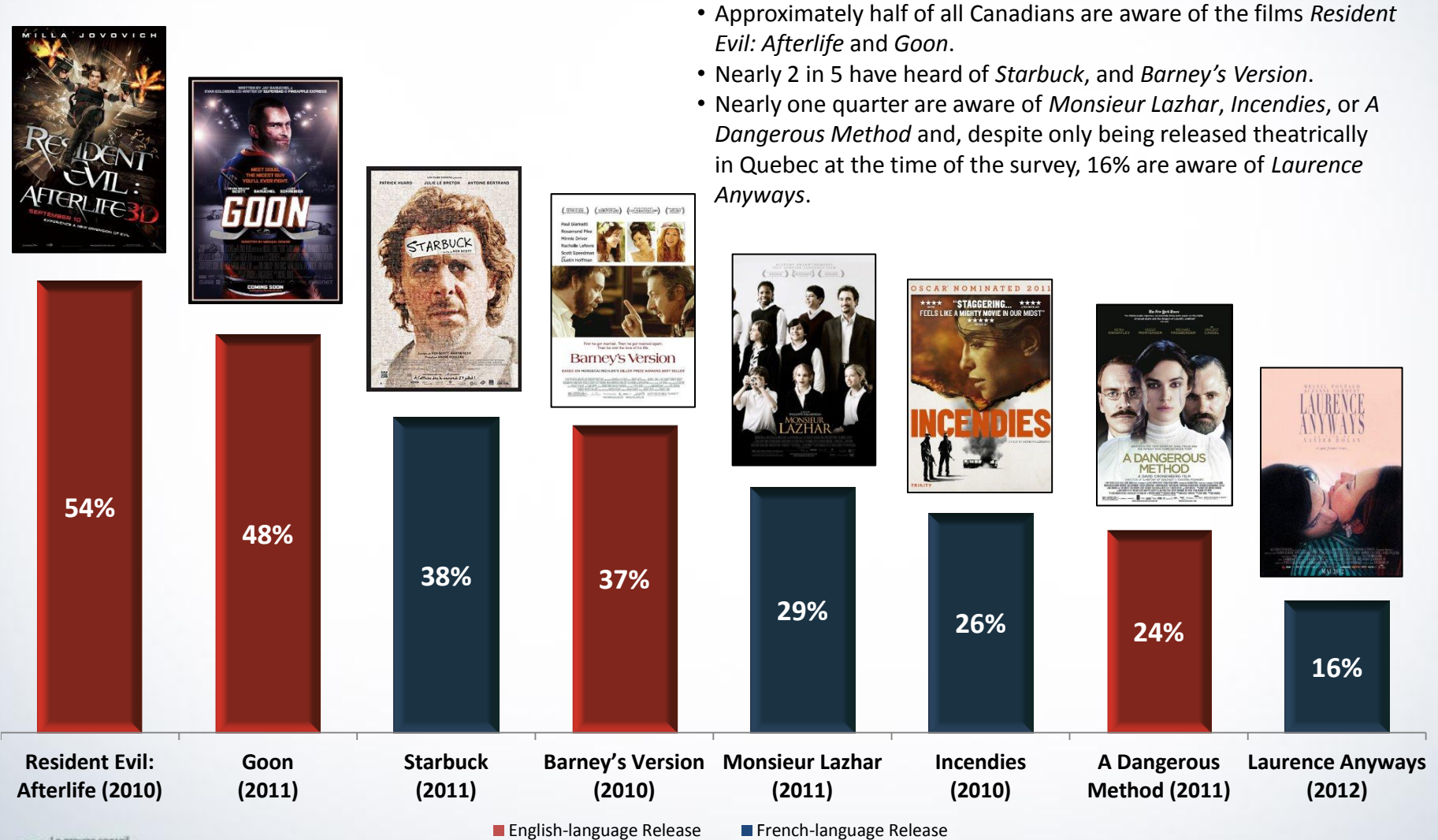
## 2012



## 2005



# Awareness of Canadian 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*.
- Nearly one quarter are aware of *Monsieur Lazhar*, *Incendies*, or *A Dangerous Method* and, despite only being released theatrically in Quebec at the time of the survey, 16% are aware of *Laurence Anyways*.

# Awareness of Canadian Films



- Similar to previous analysis, awareness of the films listed on the previous page is higher among certain Canadians.
- Regional analysis shows that residents of Atlantic provinces, Ontario, Alberta, British Columbia and the Territories, are more aware of *Resident Evil: Afterlife*, particularly compared to Quebecers. The latter are more aware than residents of other parts of Canada of the French-language releases such as *Starbuck*, *Monsieur Lazhar*, *Incendies*, and *Laurence Anyways*. Quebecers are also more aware of *Goon* and *Barney's Version*.
- Not surprisingly, bilingual respondents or who speak only French at home are more aware of French-language films.
- In addition to province and language differences, specific characteristics of those significantly more likely to be aware of the films presented in the survey are summarized in the following table:

Film	Profile of Canadians More Aware of Each Film
<i>Resident Evil: Afterlife</i>	Men Household income >\$80K Social media networkers Under 55 years old
<i>Goon</i>	Men Household income >\$80K Social media networkers Under 55 years old Speak only French at home
<i>Starbuck</i>	At least 55 years old Speak only French at home
<i>Barney's Version</i>	University educated Household income >\$60K
<i>Monsieur Lazhar</i>	Urban residents College (CEGEP in Quebec) educated Speak only French at home
<i>Incendies</i>	Urban residents College (CEGEP) educated Not social media networkers
<i>A Dangerous Method</i>	Under 55 years old Social media networkers Urban residents
<i>Laurence Anyways</i>	Speak only French at home /Bilingual

# Awareness of Canadian Films – by Region



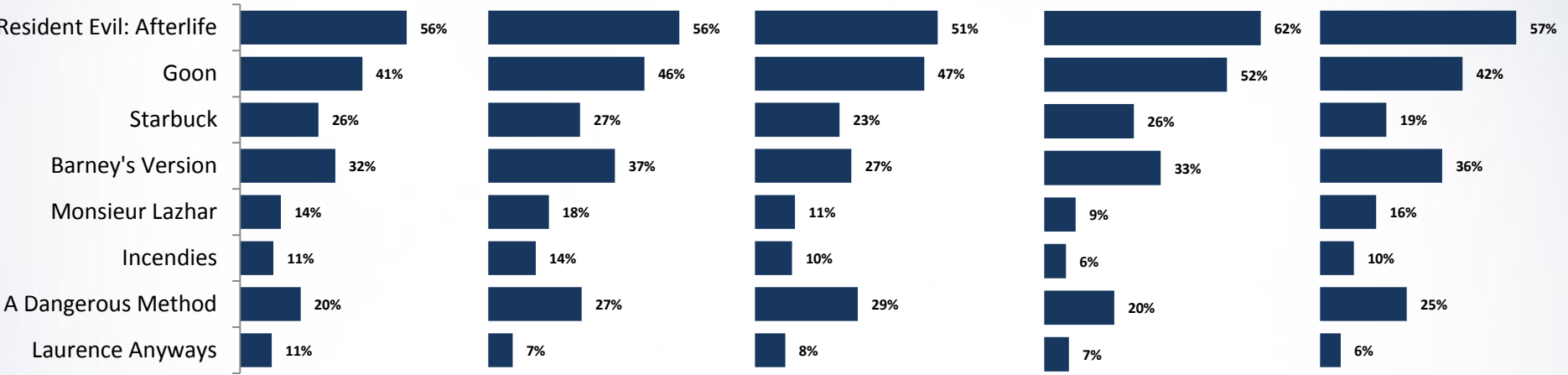
## Atlantic

## Ontario

## MB/ SK

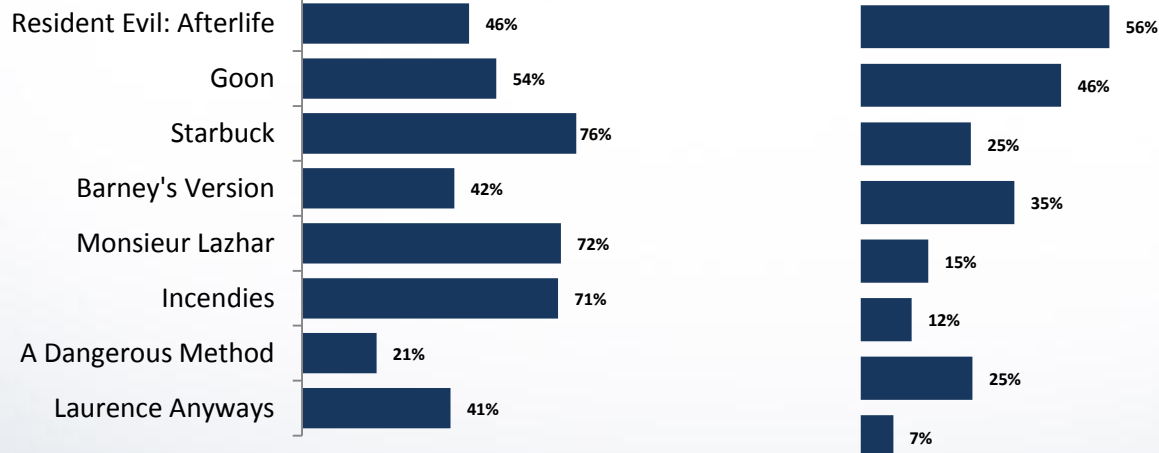
## Alberta

## BC/Terr.

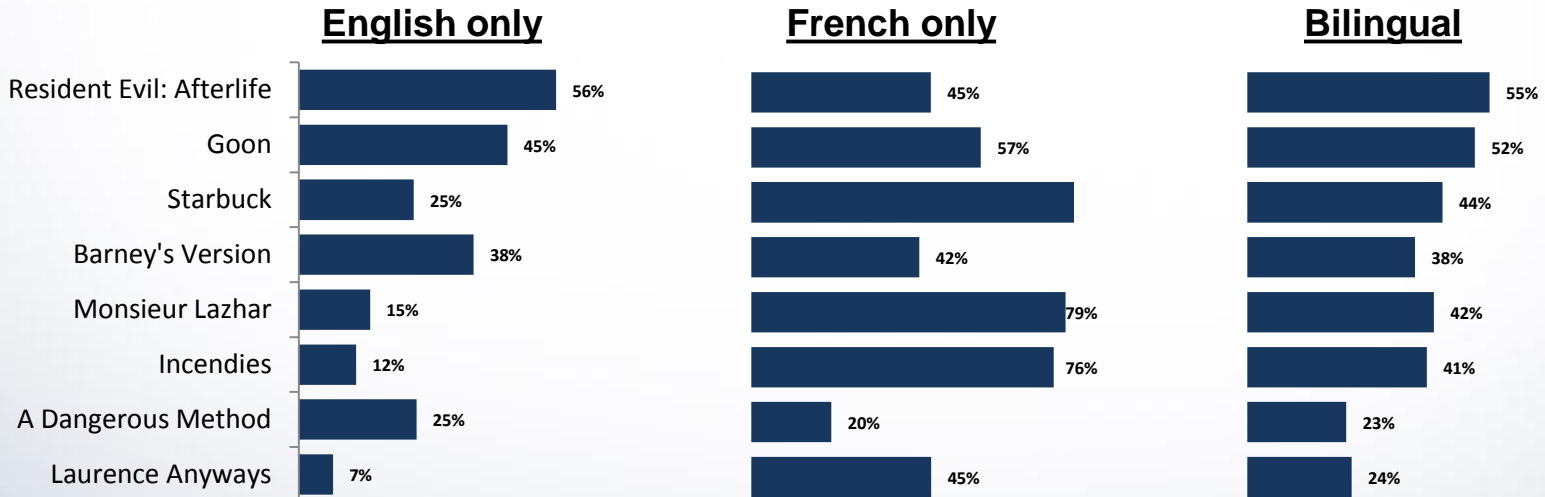
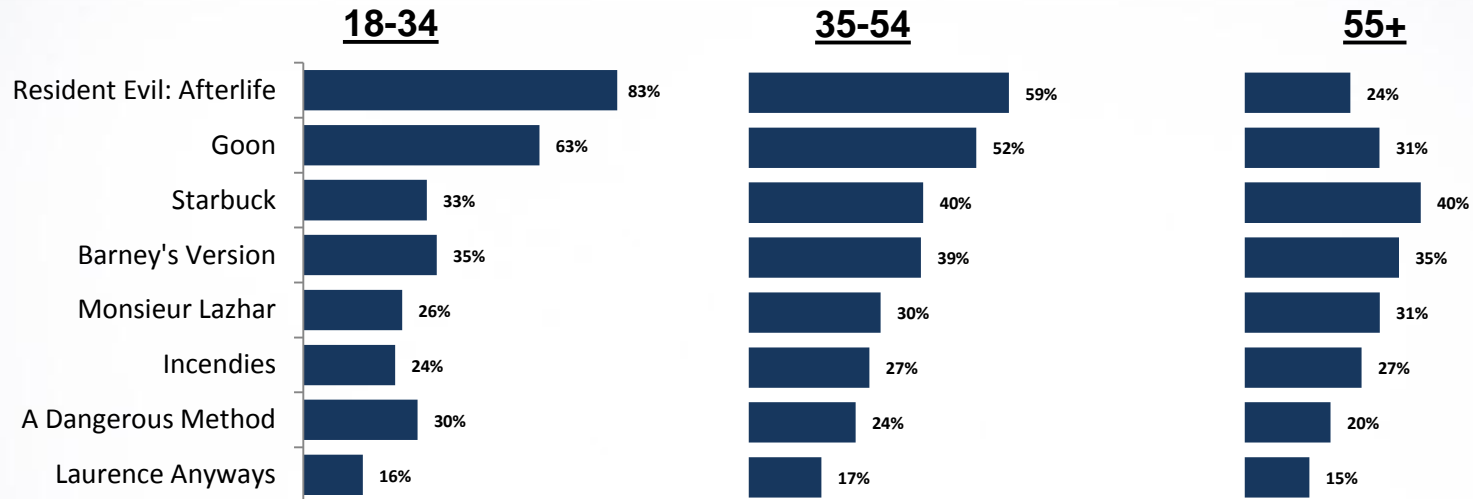


## Quebec

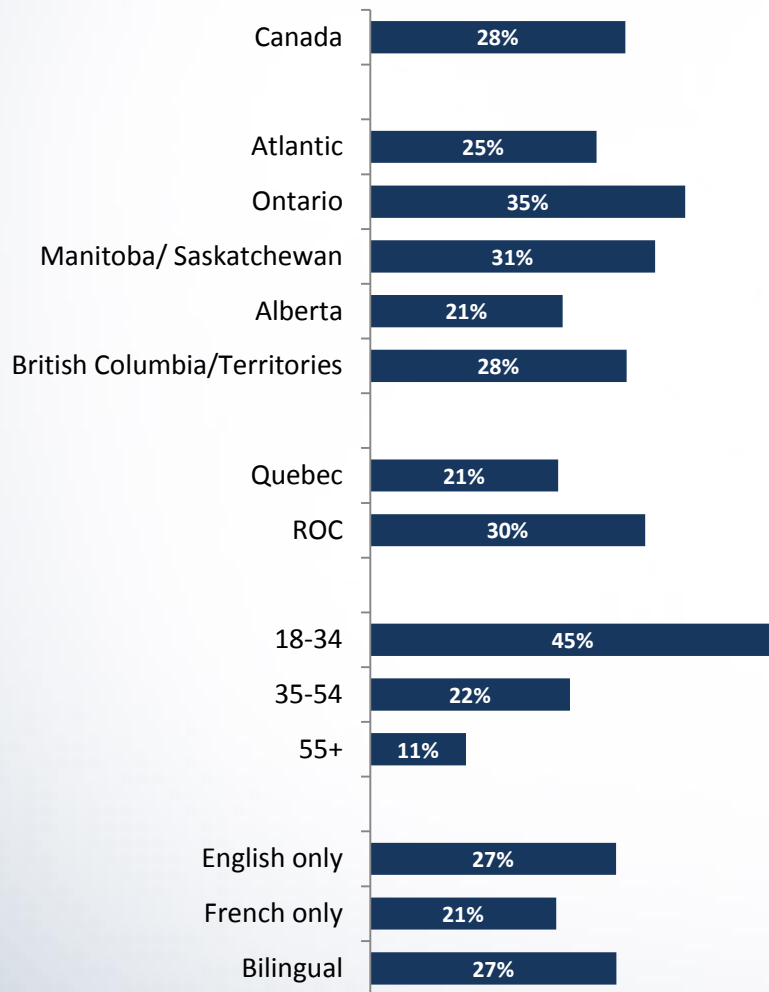
## Rest of Canada



# Awareness of Canadian Films – by Age and Language Spoken at Home

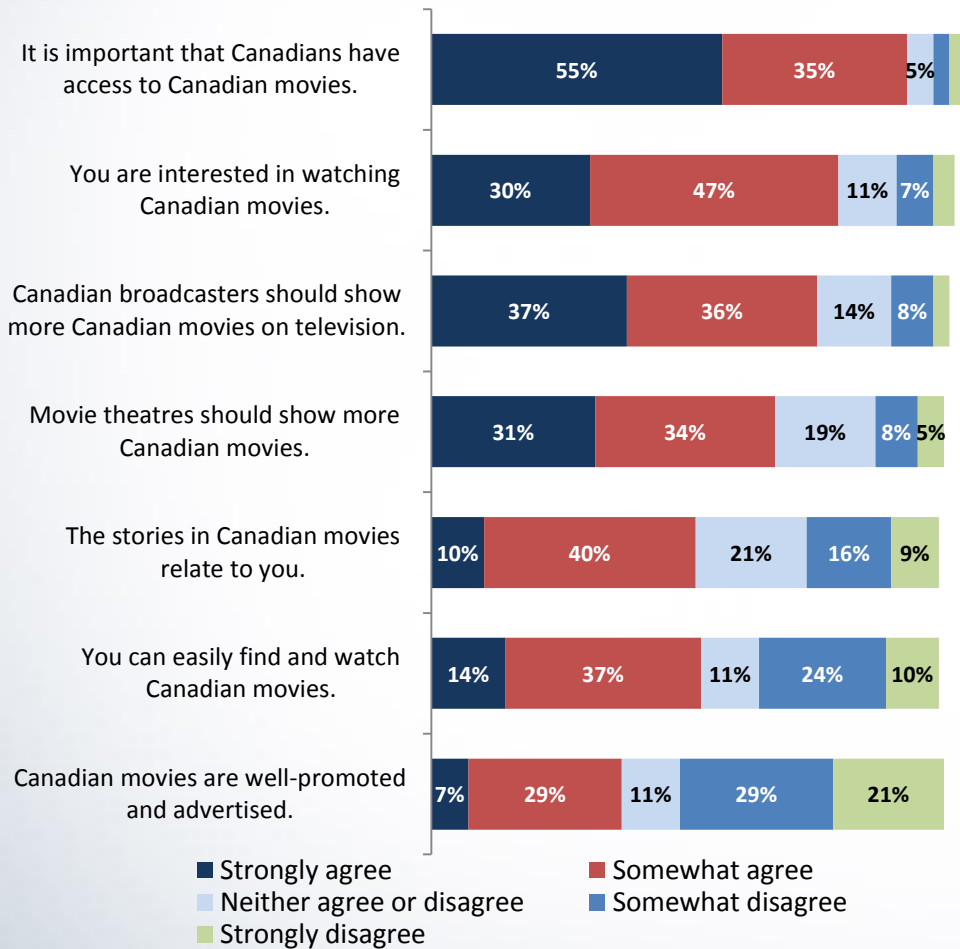


# Recommending a Film via Social Media



- Respondents who access a social media network at least once a month (i.e. social media networkers), were asked whether they had used social media to recommend a film to their friends or Twitter followers over the past 3 months.
  - Over one quarter of respondents (28%) say they have recommended a film to friends via social media in the past three months.
  - Residents of Ontario, and Manitoba and Saskatchewan are more likely to have recommended a film through social media.
  - Respondents 18 to 34 years of age are the most likely to have recommended a film via social media, compared to older respondents.
  - Respondents with a household income under \$60K are also more likely to have recommended a film via social media.

# Canadian Films and Canadian Culture



- Respondents were asked a series of questions regarding the accessibility, promotion and importance of Canadian films.
- Nine in ten respondents agree it is important that Canadians have access to Canadian films (90%).
- Approximately three quarters agree that they are interested in watching Canadian films (77%), or that Canadian broadcasters should show more Canadian films on television (73%).
- Two thirds agree movie theatres should show more Canadian films (65%).
- Half or less agree the stories in Canadian films relate to them (50%), that they can easily find and watch Canadian films (51%), and that Canadian films are well-promoted and advertised (36%).

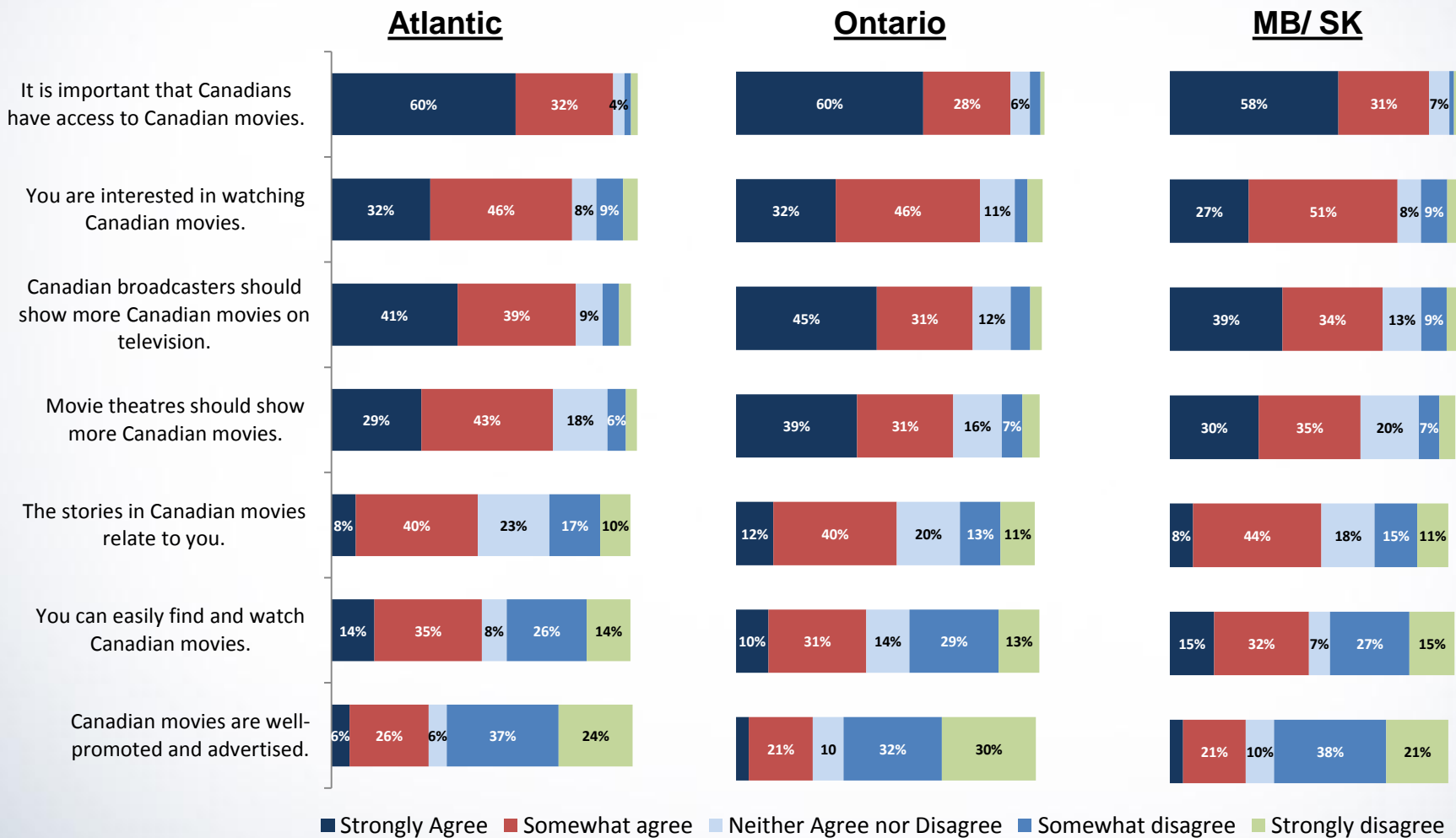
# Canadian Films and Canadian Culture



Statement	Profile of Canadians Most Likely to Agree
<i>It is important that Canadians have access to Canadian movies.</i>	Residents of Quebec HH income under \$80K Speak only French at home / bilingual
<i>You are interested in watching Canadian movies.</i>	Residents of Quebec and Ontario. Speak only French at home / bilingual
<i>Canadian broadcasters should show more Canadian movies on television.</i>	Residents of Atlantic Canada, Quebec, Ontario Women Household income under \$100K Speak only French at home
<i>Movie theatres should show more Canadian movies.</i>	Residents east of Alberta Women Household income under \$100K Speak only French at home / bilingual
<i>The stories in Canadian movies relate to you.</i>	Residents of Quebec, Ontario, MB/SK Under 35 years old Speak only French at home
<i>You can easily find and watch Canadian movies.</i>	Residents of Quebec HH income under \$60K Speak only French at home / bilingual
<i>Canadian movies are well-promoted and advertised.</i>	Residents of Quebec Less than university education HH income of less than \$40K Non-social media networkers At least 55 years old Speak only French at home / bilingual

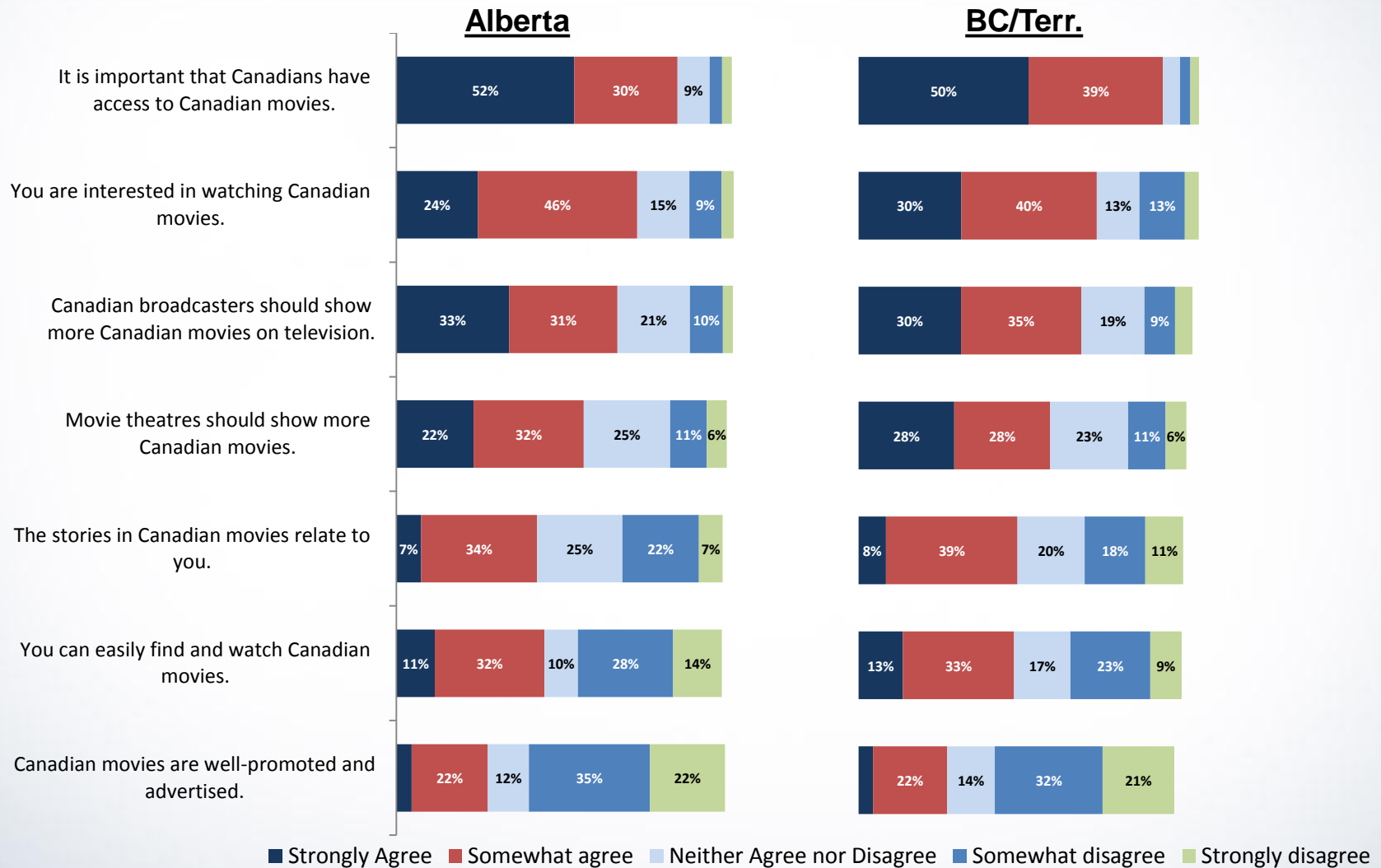


# Canadian Films and Canadian Culture – by Region

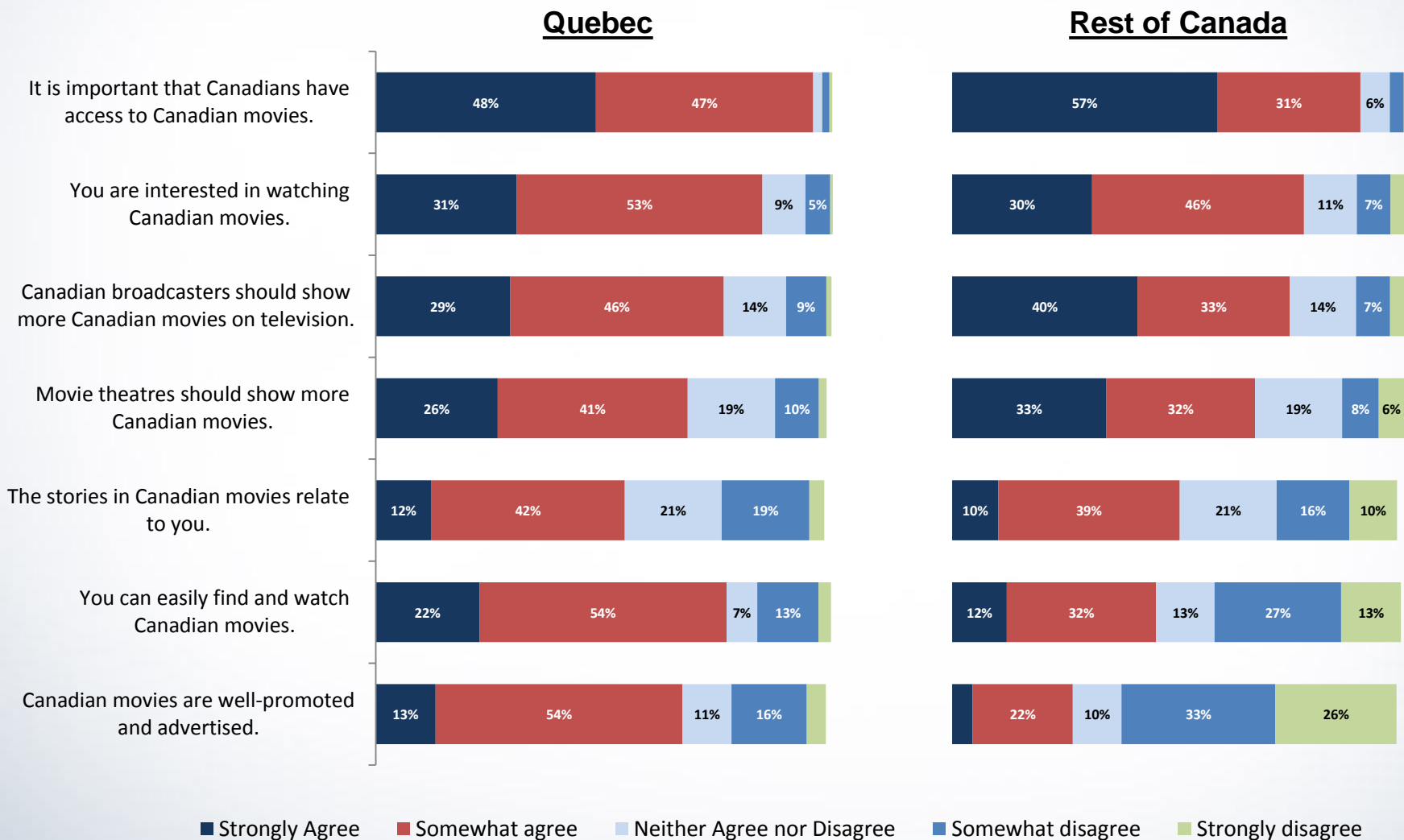


■ Strongly Agree 
 ■ Somewhat agree 
 ■ Neither Agree nor Disagree 
 ■ Somewhat disagree 
 ■ Strongly disagree

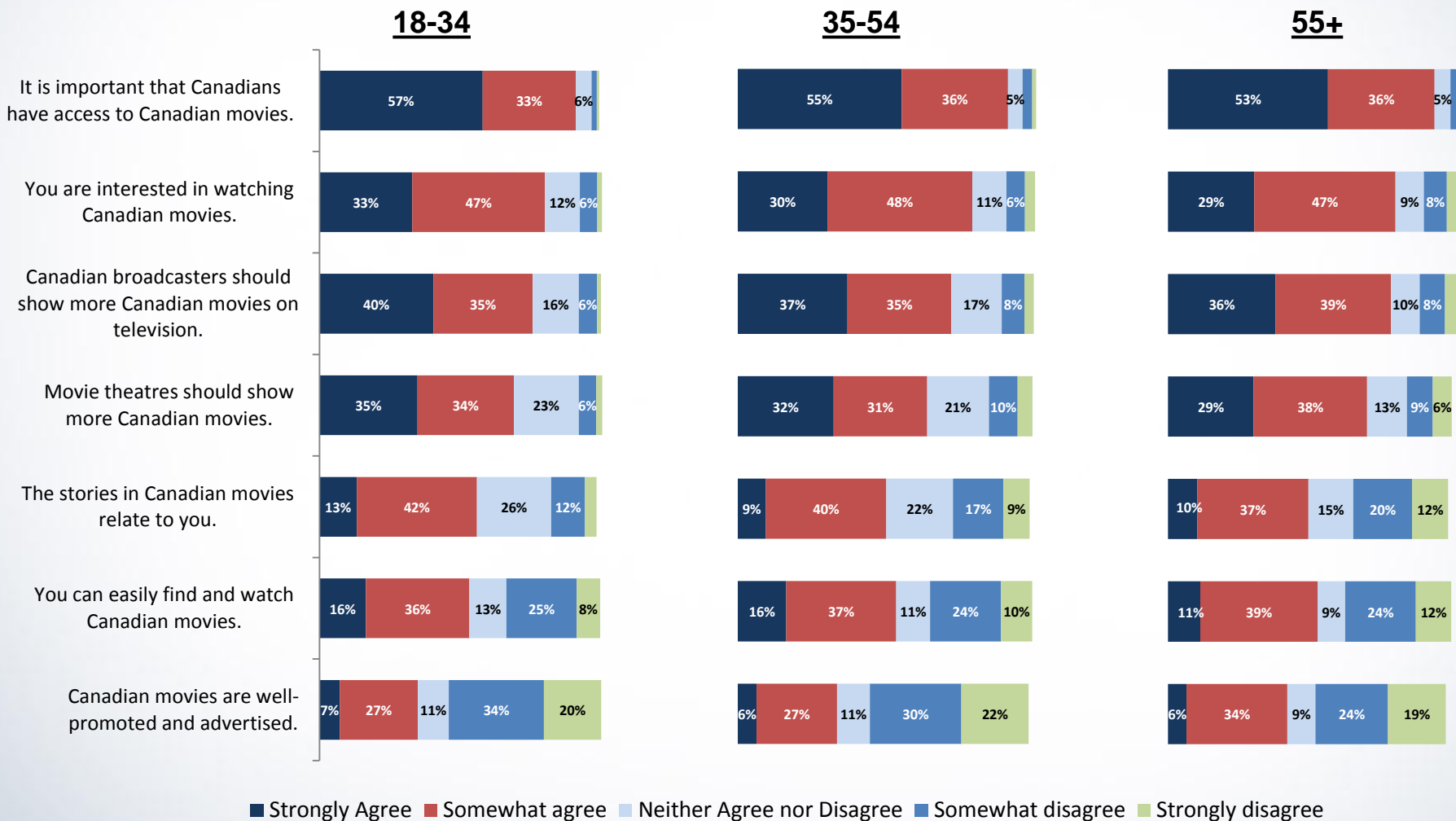
# Canadian Films and Canadian Culture – by Region



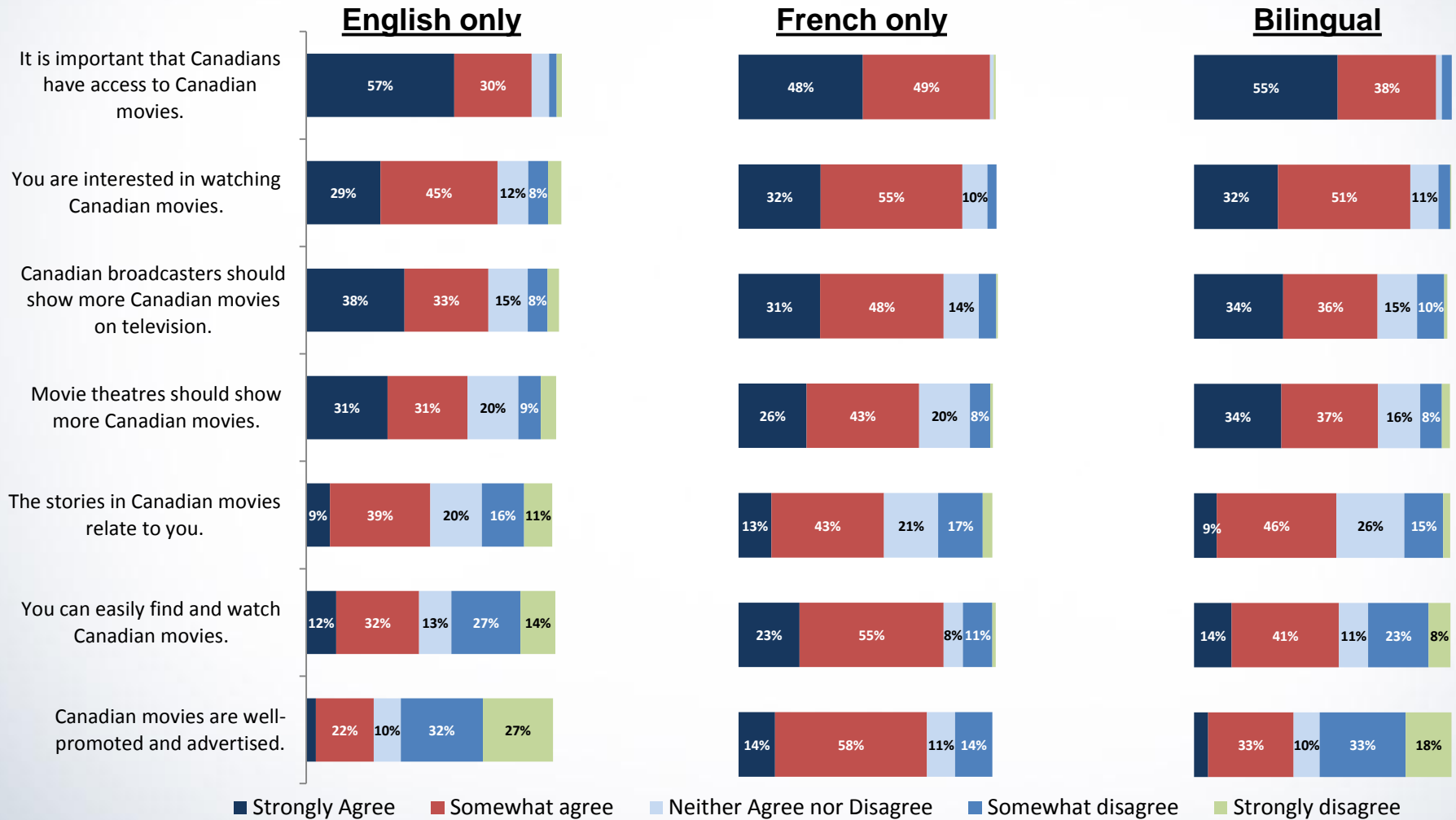
# Canadian Films and Canadian Culture – by Region



# Canadian Films and Canadian Culture – by Age



# Canadian Films and Canadian Culture – by Language Spoken at Home



# Canadian Films and Canadian Culture – Comparative Analysis



This comparative analysis involves different methodologies. The 2005 and 2012 data below is intended to illustrate a trend, but cannot be directly compared.

Regarding attitudes Canadians have towards Canadian film, a range of statements were used in 2012 that varied in language compared to 2005 but still tend to assess key issues related to interest, accessibility, and promotion:

- The one statement that remained consistent with the 2005 study asked whether Canadians agree that they can relate to the stories in Canadian movies – results for 2012 seem to suggest that twice as many Canadians feel they can relate compared to 2005.
- Regarding the presence of Canadian films in movie theatres, nearly two thirds of Canadians in 2012 agree (65%) that movie theatres should show more Canadian movies. This certainly aligns with the strong sentiment expressed in 2005 whereby 83% of Canadians thought it was important that Canadian movies be seen in movie theatres in Canada. This sentiment is consistent with another finding from the 2005 study that showed that most Canadians either did not feel that Canadian films were available in movie theatres (35%) or they simply were not sure (17% did not know and another 25% neither agreed or disagreed). Certainly Canadians felt that movie theatres were an important distribution channel for Canadian movies in 2005 and this sentiment continues to hold true in 2012.
- Canadians also continue to feel strongly about accessing Canadian movies on television via Canadian broadcasters. In 2005, 82% of Canadians agreed that it is important that Canadian movies be seen on Canadian TV and in 2012, 73% agree that Canadian broadcasters should show more Canadian movies on television.

# Canadian Films and Canadian Culture – Comparative Analysis



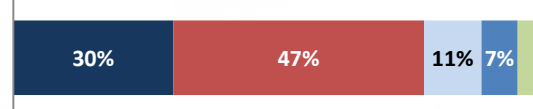
**2012**

**2005**

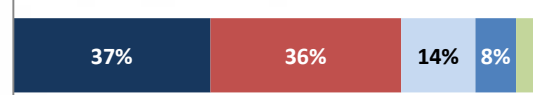
It is important that Canadians have access to Canadian movies.



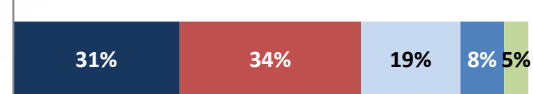
You are interested in watching Canadian movies.



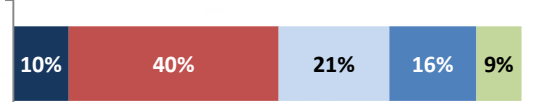
Canadian broadcasters should show more Canadian movies on television.



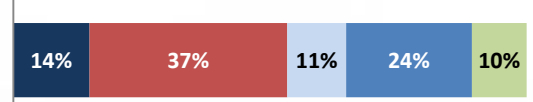
Movie theatres should show more Canadian movies.



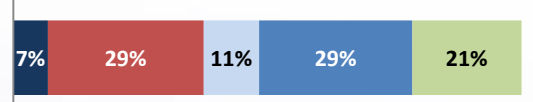
The stories in Canadian movies relate to you.



You can easily find and watch Canadian movies.

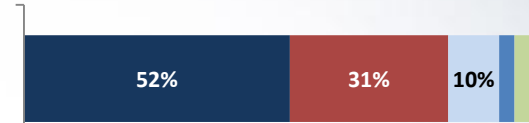


Canadian movies are well-promoted and advertised.



■ Strongly agree  
■ Somewhat agree  
■ Neither agree or disagree  
■ Somewhat disagree  
■ Strongly disagree

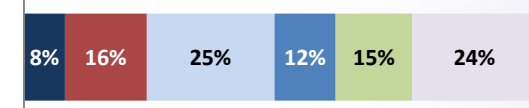
I think it is important that Canadian movies can be seen in movie theatres in Canada



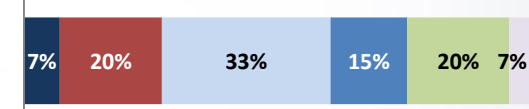
I think it is important that Canadian movies can be seen on Canadian TV



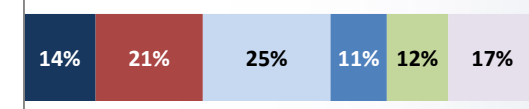
Most Canadian films are not available in video stores



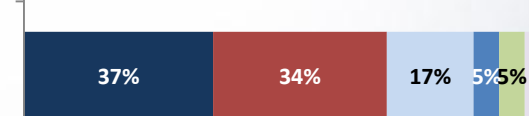
The stories in Canadian movies relate to you.



Most Canadian films are not available in movie theatres



More people would watch Canadian movies if they were promoted and advertised better



■ Strongly Agree (9-10)  
■ Neither Agree nor Disagree (5-6)  
■ Strongly disagree (1-2)  
■ Somewhat agree (7-8)  
■ Somewhat disagree (3-4)  
■ No opinion/Refuse

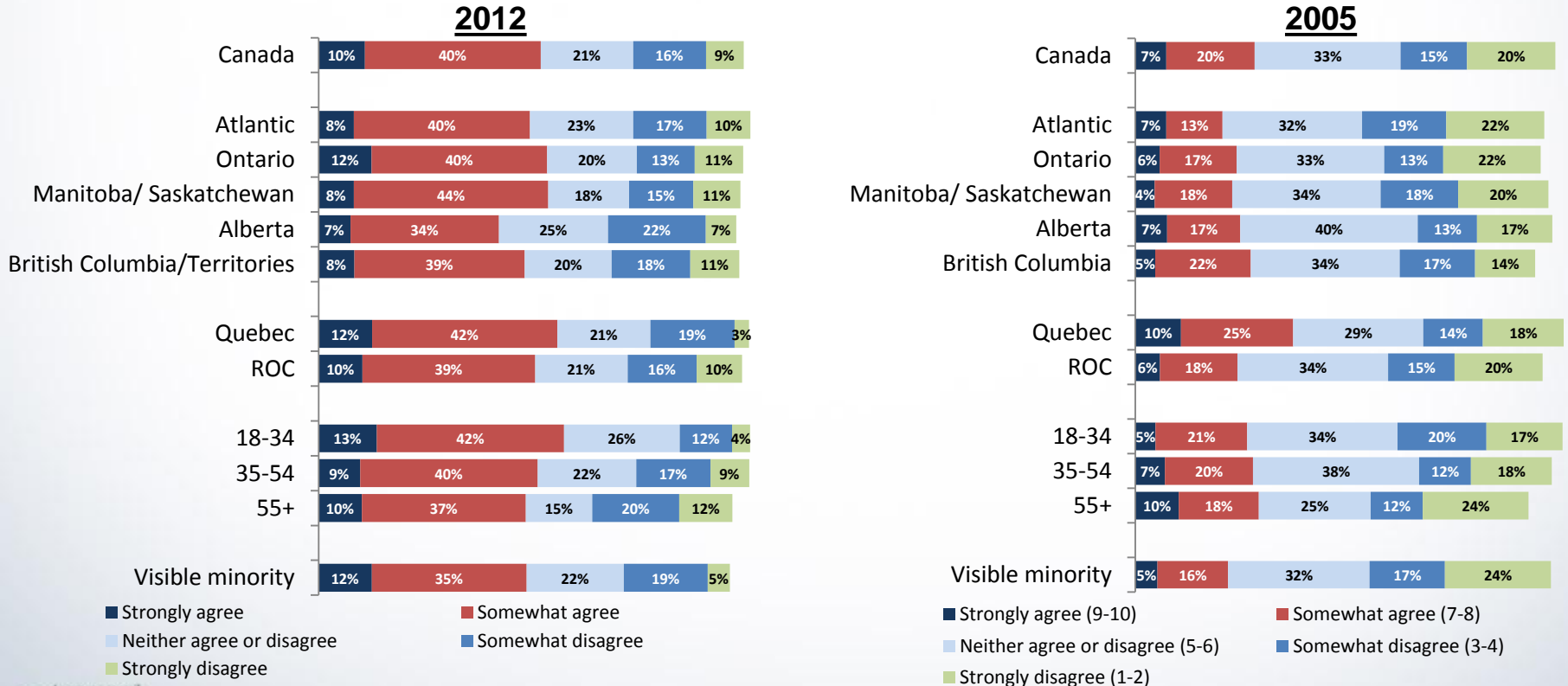
# Canadian Films and Canadian Culture – Comparative Analysis



In terms of whether or not Canadians relate to the stories in Canadian movies, the figures below show that the increase in agreement is more or less cross-cutting. All regions and age groups tend to be in stronger agreement in 2012 compared to 2005.

One trend worth underlining relates to how the results have evolved across the different age groups. In 2005, agreement grew stronger with age – in other words older Canadians were more likely to feel that they could relate to the stories in Canadian movies. In 2012, this trend is somewhat reversed – now the stories in Canadian movies seem to be resonating a bit more with youth between 18 and 34. Another trend is among visible minorities – a much greater percent seem to relate to movies in 2012 compared to 2005, a trend that is consistent with the overall national results.

*“The stories in Canadian movies relate to you.”*





# Periodicals



Canadian  
Heritage

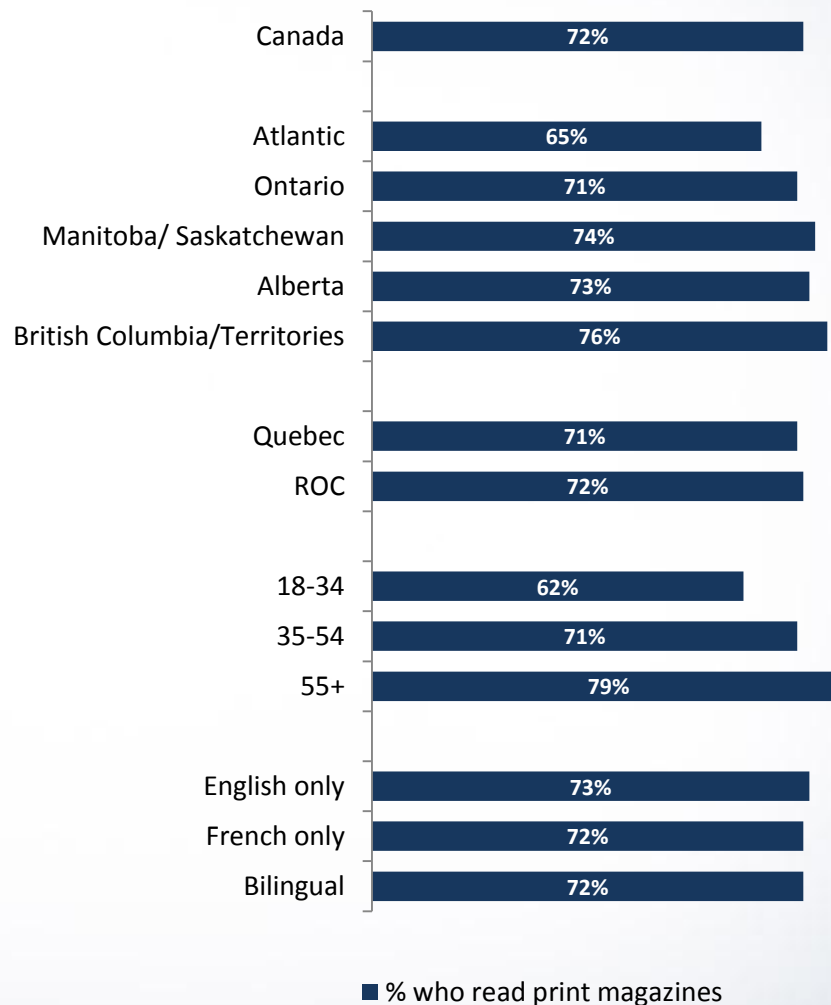
Patrimoine  
canadien

# Reading Print Magazines



- Approximately 7 in 10 respondents (72%) say they read print magazines.
- This finding is very consistent from one region to the next.
- From a demographic perspective, the likelihood of reading print magazines increases with age. As well, women are more likely to read print magazines than men (75% vs. 68%).

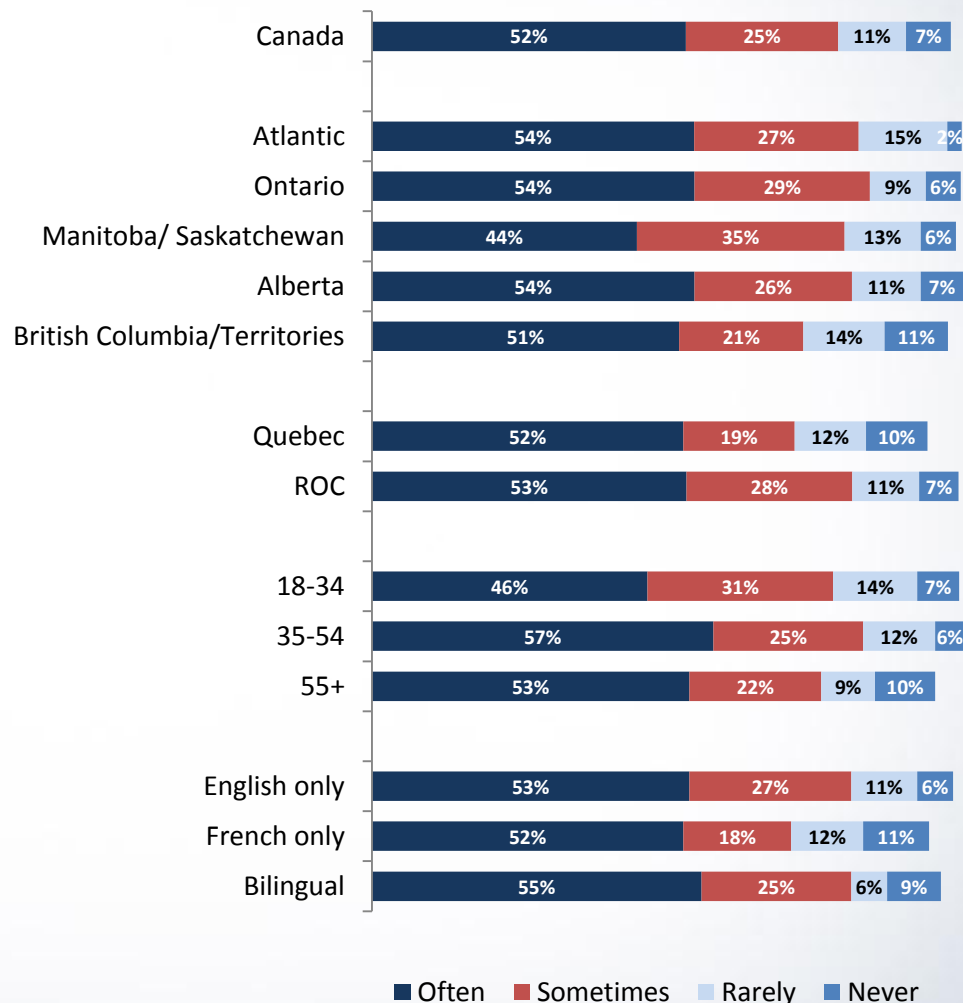
**Note:** These results were derived through question C2 – respondents who do not read print magazines was recorded. Based on these responses, the percent who do read print magazines was estimated.



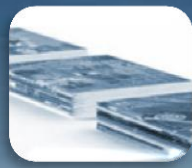
# Recognizing Canadian Magazines



- Among readers of print magazines, nearly 4 in 5 (77%) say they can *often* or *sometimes* easily tell the difference between a Canadian and a non-Canadian print magazine.
- Quebec and British Columbia residents are the least likely to say they can often or sometimes differentiate between these two types of magazines.
- Respondents 35 to 54 years of age are more likely to say they can often distinguish between Canadian and non-Canadian magazines.
- In addition, respondents with at least college/CEGEP education, and those with a household income over \$40K are more likely to say they can make this distinction.

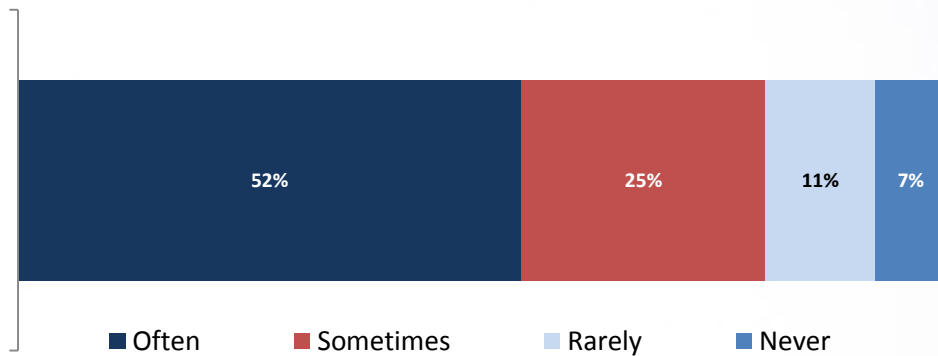


# Recognizing Canadian Magazines - Comparative Analysis

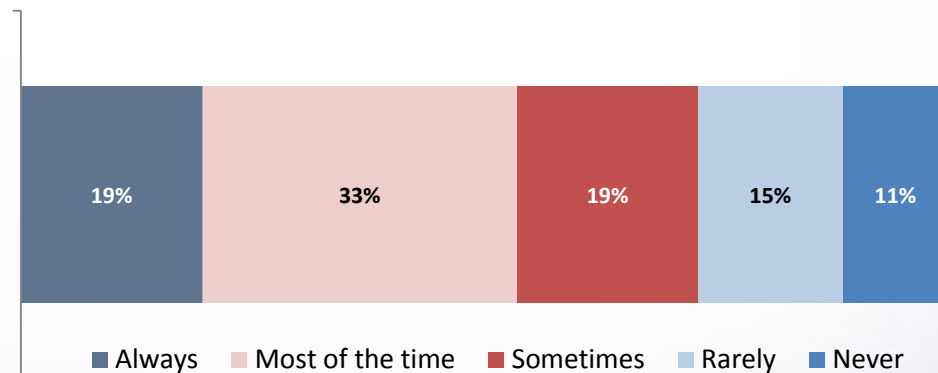


Canadians appear to be growing increasingly confident that they can tell the difference between a Canadian print magazine and a non-Canadian print magazine. The proportion of magazine readers that feel they can *rarely* or *never* tell the difference has dropped from 26% in 2008 to 18% in 2012 while those who can tell the difference *sometimes* has grown from 19% to 25%.

(2012) How often can you easily tell the difference between a Canadian print magazine and a non-Canadian print magazine?  
Would you say...



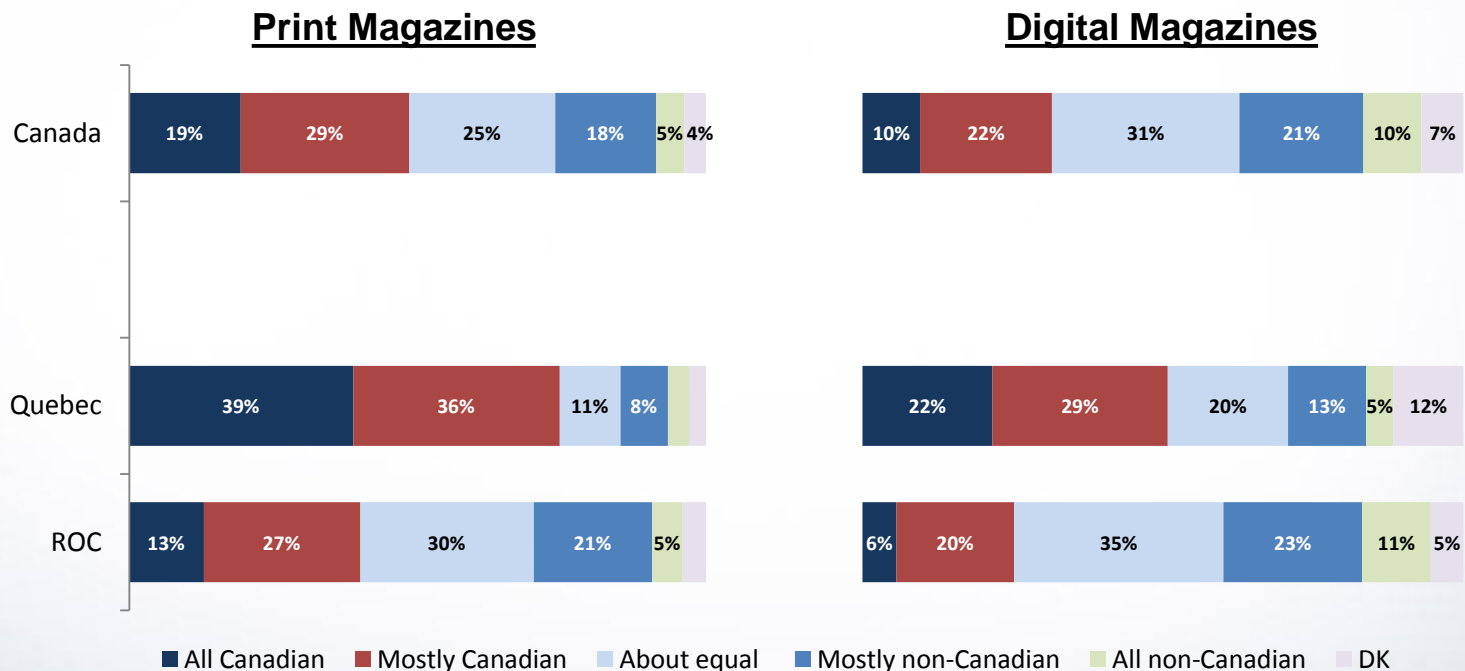
(2008) How often can you easily distinguish between a Canadian print magazine and a foreign print magazine, such as a US or European magazine?



# Reading Canadian vs. Non-Canadian Magazines



- 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.
- Quebecers are by far the most likely to say that all or mostly all of the print or digital magazines they read are Canadian (75% and 51% respectively).
- Older respondents (over the age of 55) are more likely than younger respondents, to say that all or mostly all of the print or digital magazines they read are Canadian.
- Respondents who speak only French at home are more likely to say that all or mostly all of the print or digital magazines they read are Canadian.

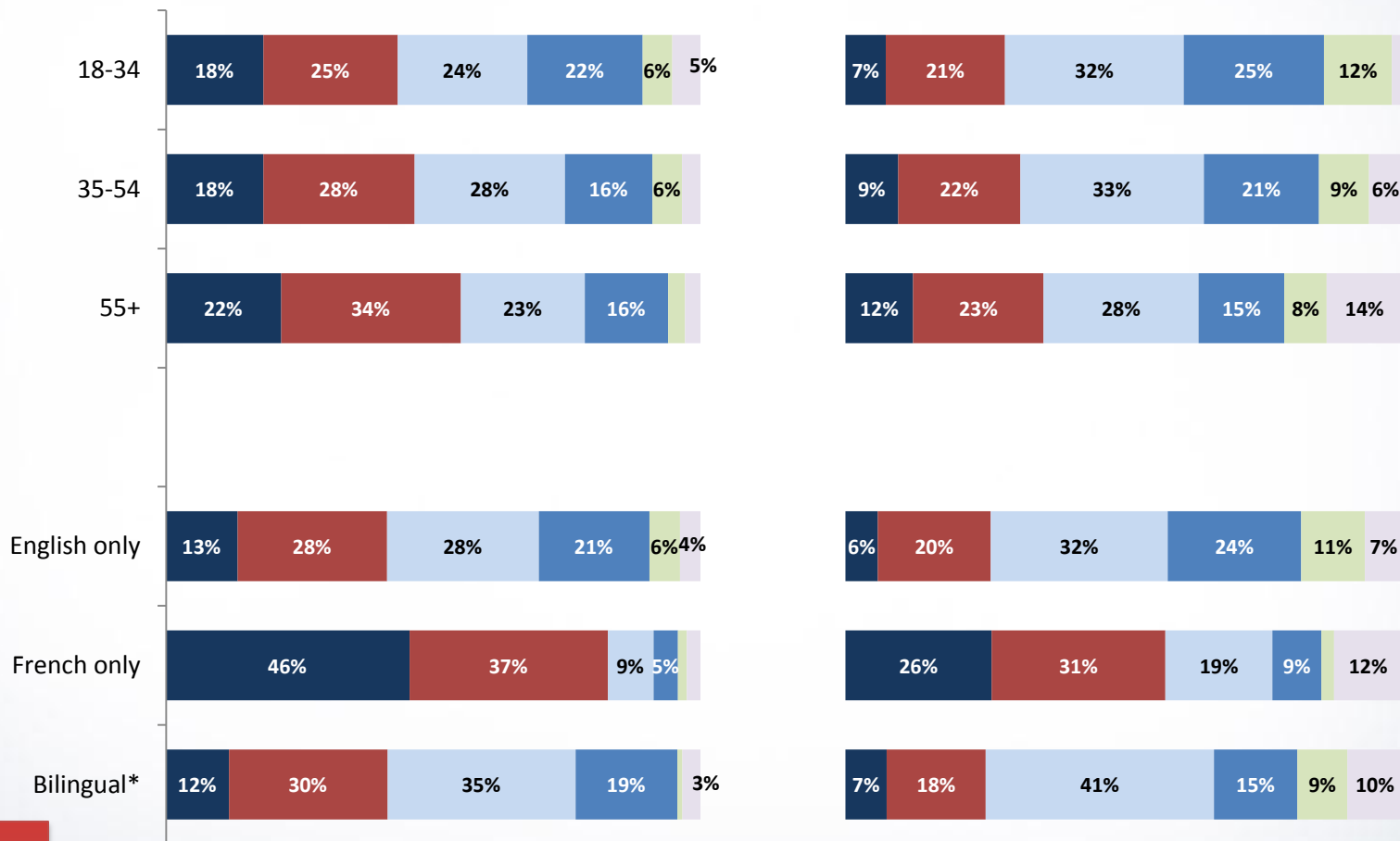


# Reading Canadian vs. Non-Canadian Magazines



## Print Magazines

## Digital Magazines



\*Results are based on small sample sizes. Please exercise caution when drawing conclusions from these results.

■ All Canadian ■ Mostly Canadian ■ About equal ■ Mostly non-Canadian ■ All non-Canadian ■ DK

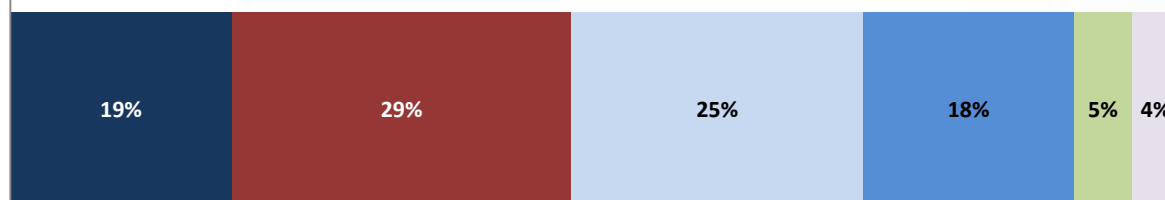
# Reading Canadian vs. Non-Canadian Magazines - Comparative Analysis



This comparative analysis involves different methodologies. The 2008 and 2012 data below is intended to illustrate a trend, but cannot be directly compared.

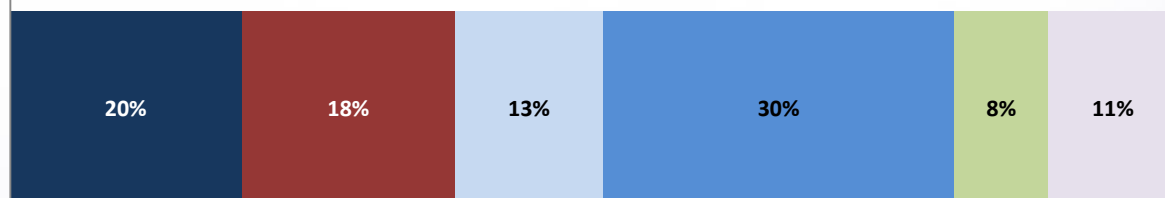
Are Canadians reading more Canadian print magazines compared to 2008? The two studies used different questions to help understand this issue. By grouping the percentages from the 2008 study to more or less reflect the answer codes used in 2012, we can see below that Canadians seem to be reading somewhat more Canadian print magazines. While those reading exclusively Canadian is nearly identical, we see 29% indicating their reading is “mostly Canadian”, compared to 18% in 2008 who believe that between 51% and 99% of their reading or browsing was Canadian. As well, the 2012 study suggests fewer Canadians are predominantly reading non-Canadian magazines.

(2012) Of the print magazines you read for leisure in a typical month, what is the balance between Canadian and non-Canadian magazines? Would you say they are...



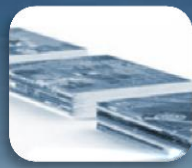
■ All Canadian ■ Mostly Canadian ■ About equal ■ Mostly non-Canadian ■ All non-Canadian ■ DK/Refuse

(2008) What percentage of your total time spent reading or browsing print magazines is spent reading or browsing Canadian print magazines?

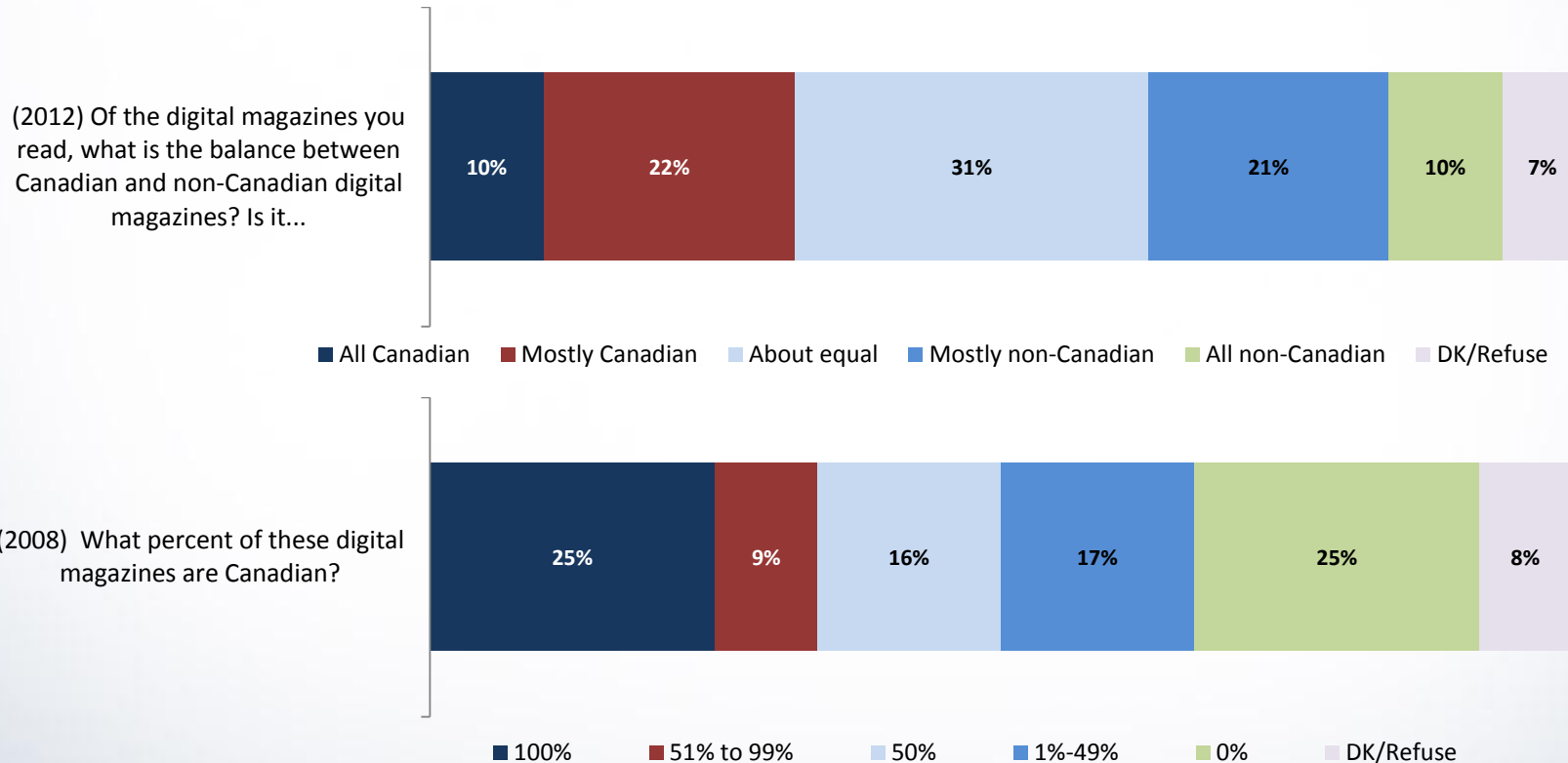


■ 100% ■ 51% to 99% ■ 50% ■ 1%-49% ■ 0% ■ DK/Refuse

# Reading Canadian vs. Non-Canadian Magazines - Comparative Analysis

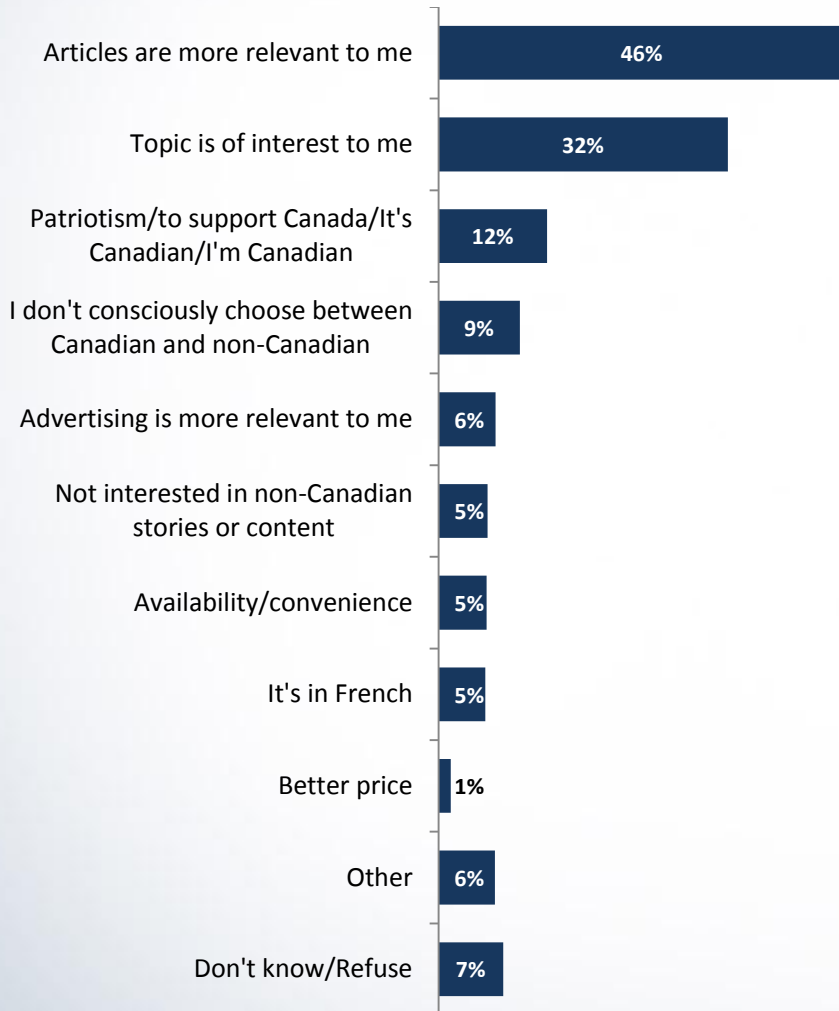


In terms of reading digital magazines, results for 2012 would suggest that Canadians are now reading a greater variety in terms of Canadian and non-Canadian magazines. Whereas readers in 2008 tended to be fairly polarized, reading either entirely Canadian content or entirely non-Canadian content (and only 16% reading each in equal proportions), this is much less the case in 2012. In the most recent study, only 10% say that they are either reading only Canadian or reading only non-Canadian digital magazines, and nearly one-third (31%) believe the distribution is about equal.



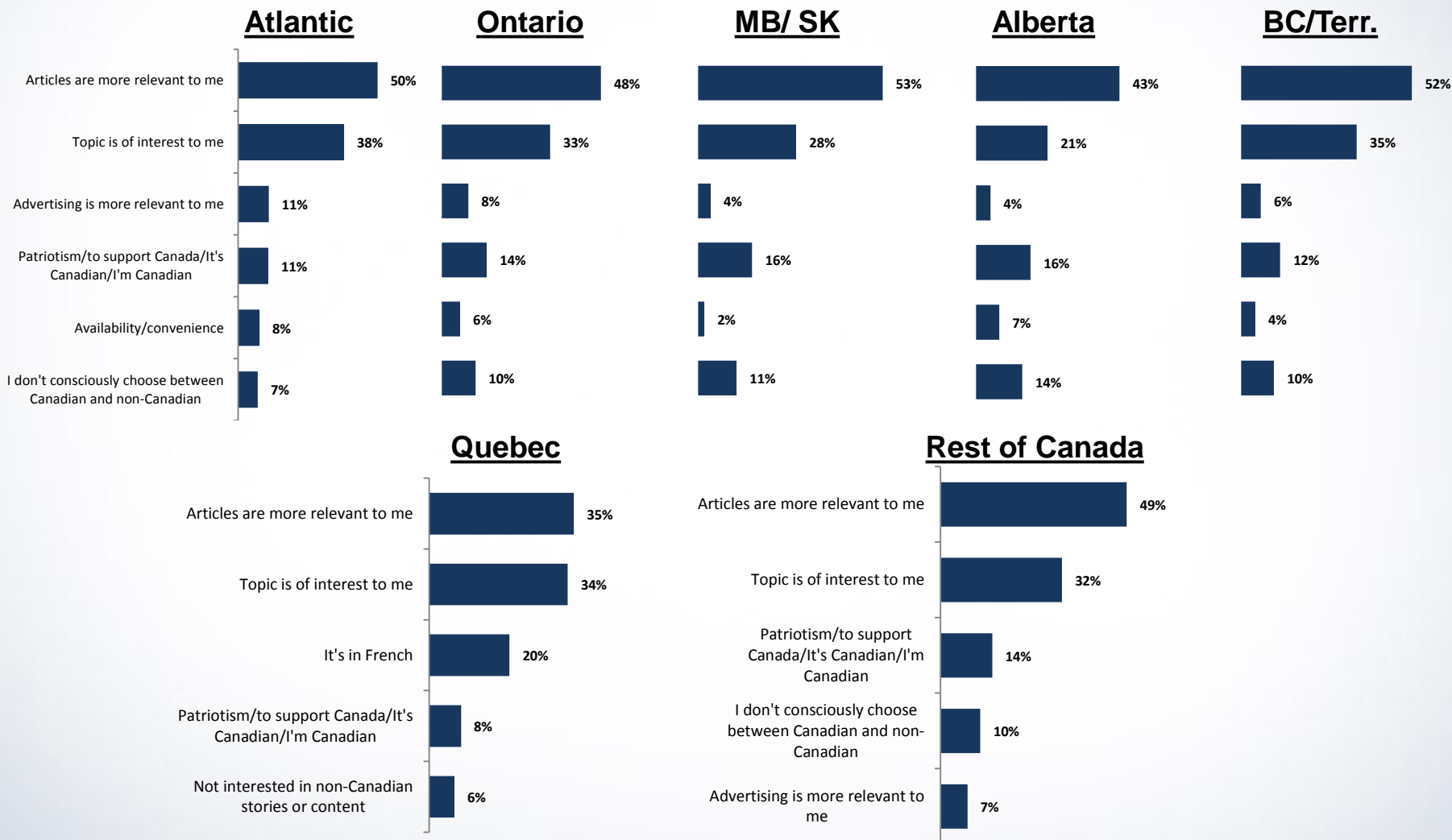


# Reasons for Choosing Canadian Magazines over Foreign

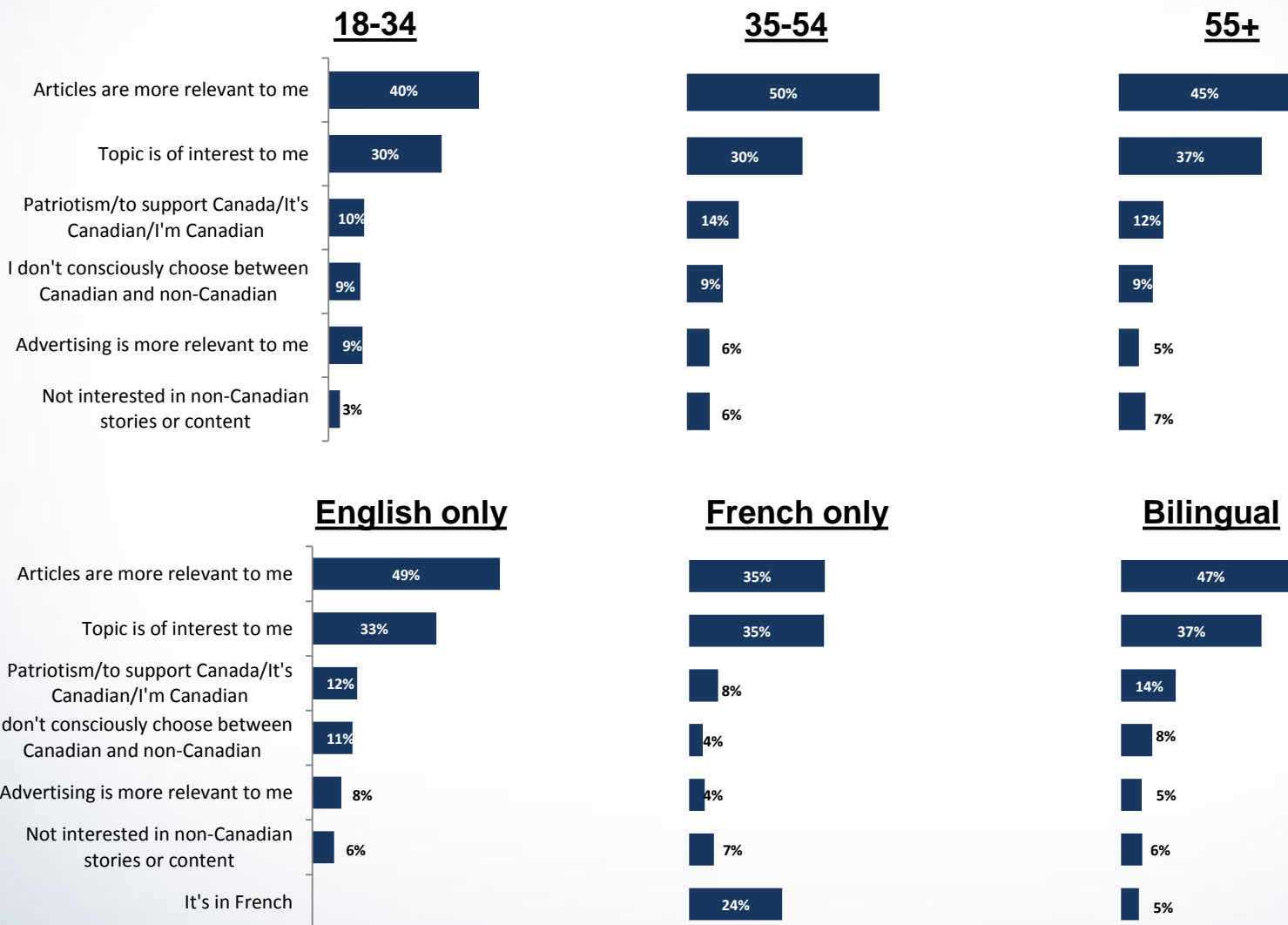


- The main reasons to choose a Canadian print magazine over a non-Canadian magazine are that the articles are more relevant to the readers (46%) and that the topics are of interest (32%).
- Approximately 1 in 10 say that they choose to read Canadian magazines as a sign of patriotism (12%) or that they do not consciously choose between the two types (9%).
- Other minor reasons include: advertising, no interest in non-Canadian content, availability, language, and price.
- Residents outside of Quebec, who speak only English at home or are bilingual, are more likely to feel the articles are more relevant to them.
- “Topic is of interest to me” is least likely to be said by residents of Manitoba/ Saskatchewan, and Alberta, but more likely to be said by those over 54 years of age.
- Quebecers are the least likely to say they choose Canadian magazines because of patriotic reasons.
- Finally, Canadians who speak only English at home, and residents of rural areas are more likely to choose Canadian magazines to be patriotic.

# Top Reasons for Choosing Canadian Magazines over Foreign – by Region



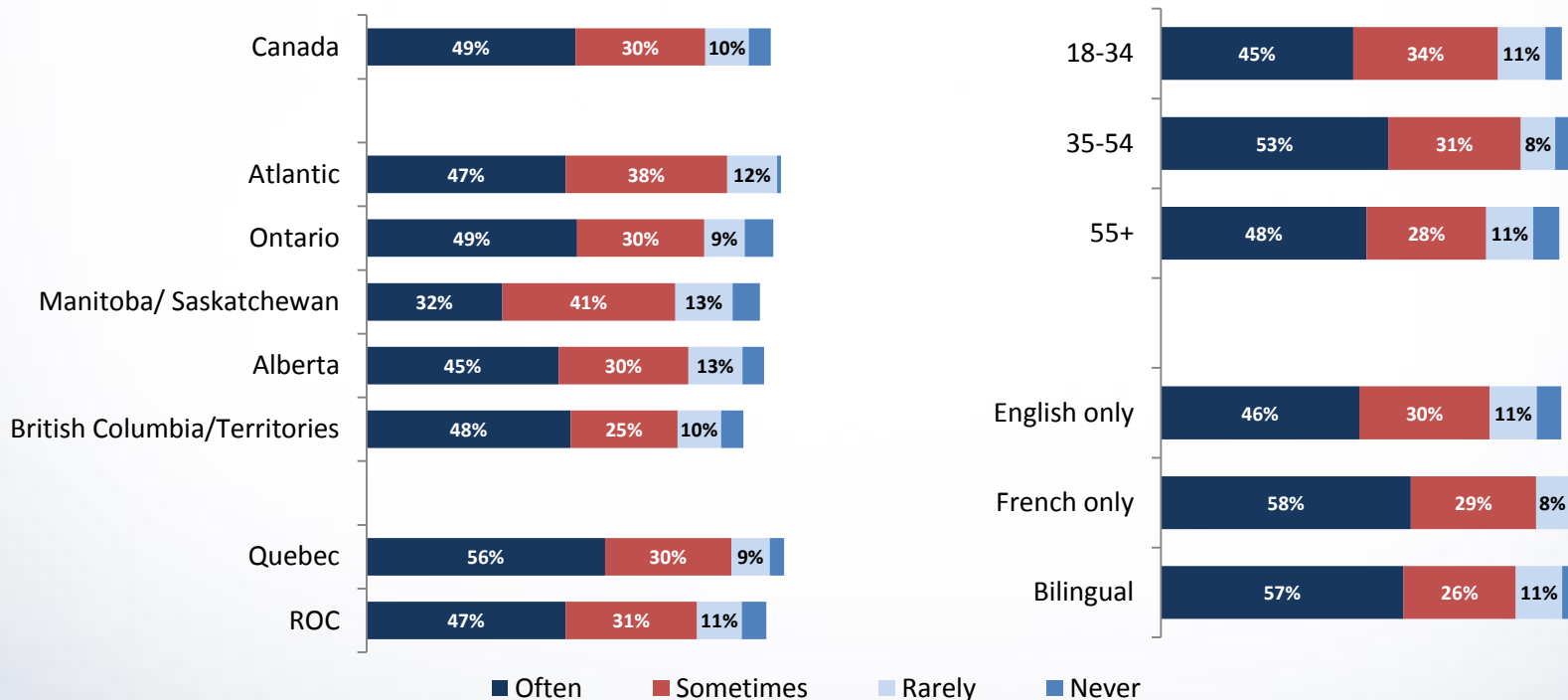
# Top Reasons for Choosing Canadian Magazines over Foreign – by Age and Language Spoken at Home



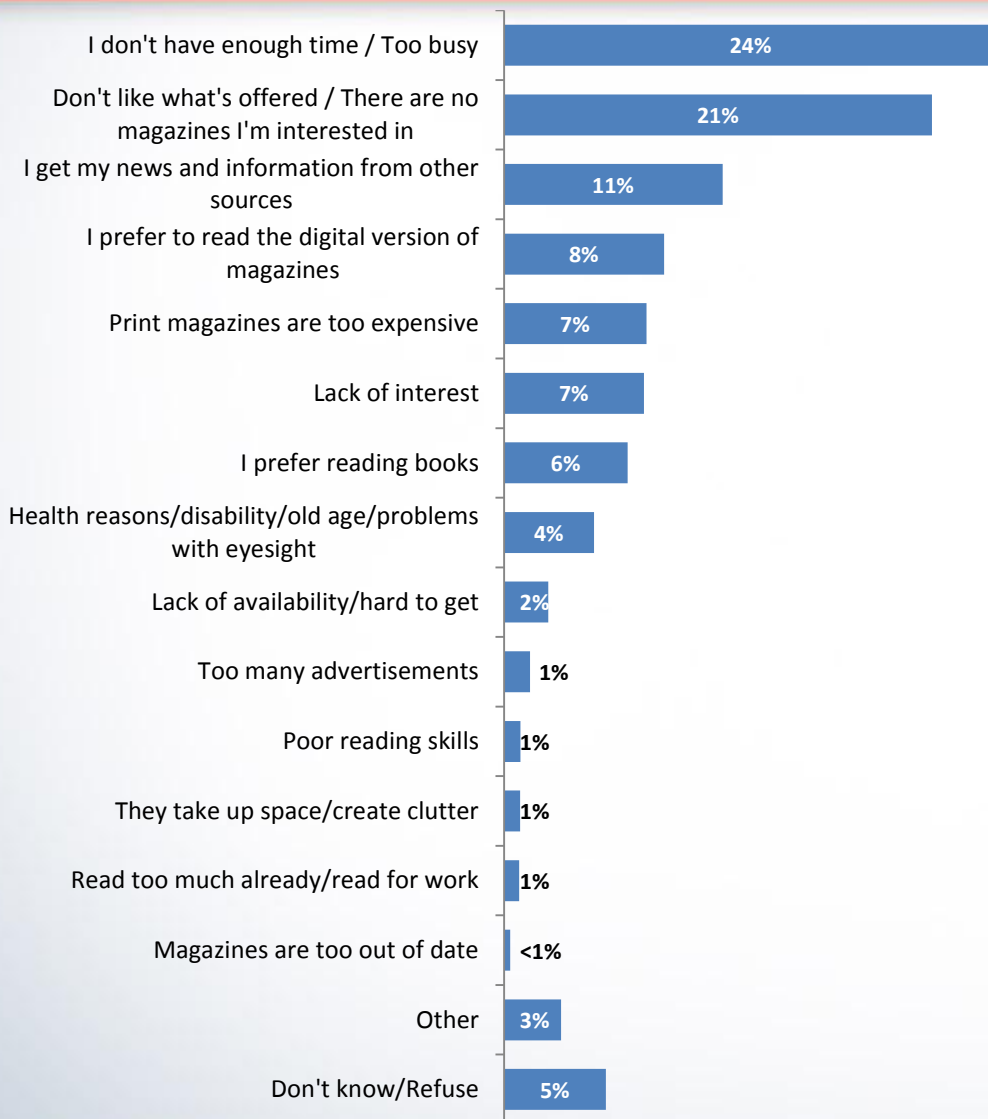
# Finding Canadian Magazines of Interest



- Nearly 4 in 5 respondents say they can *often* or *sometimes* find a Canadian print magazine on a topic of interest.
- Manitoba and Saskatchewan residents are the least likely to say they can *often* or *sometimes* find a Canadian magazine on a topic of interest.
- On the other hand, women, respondents who speak only French at home or are bilingual are more likely to say they often find a Canadian magazine on a topic of interest.

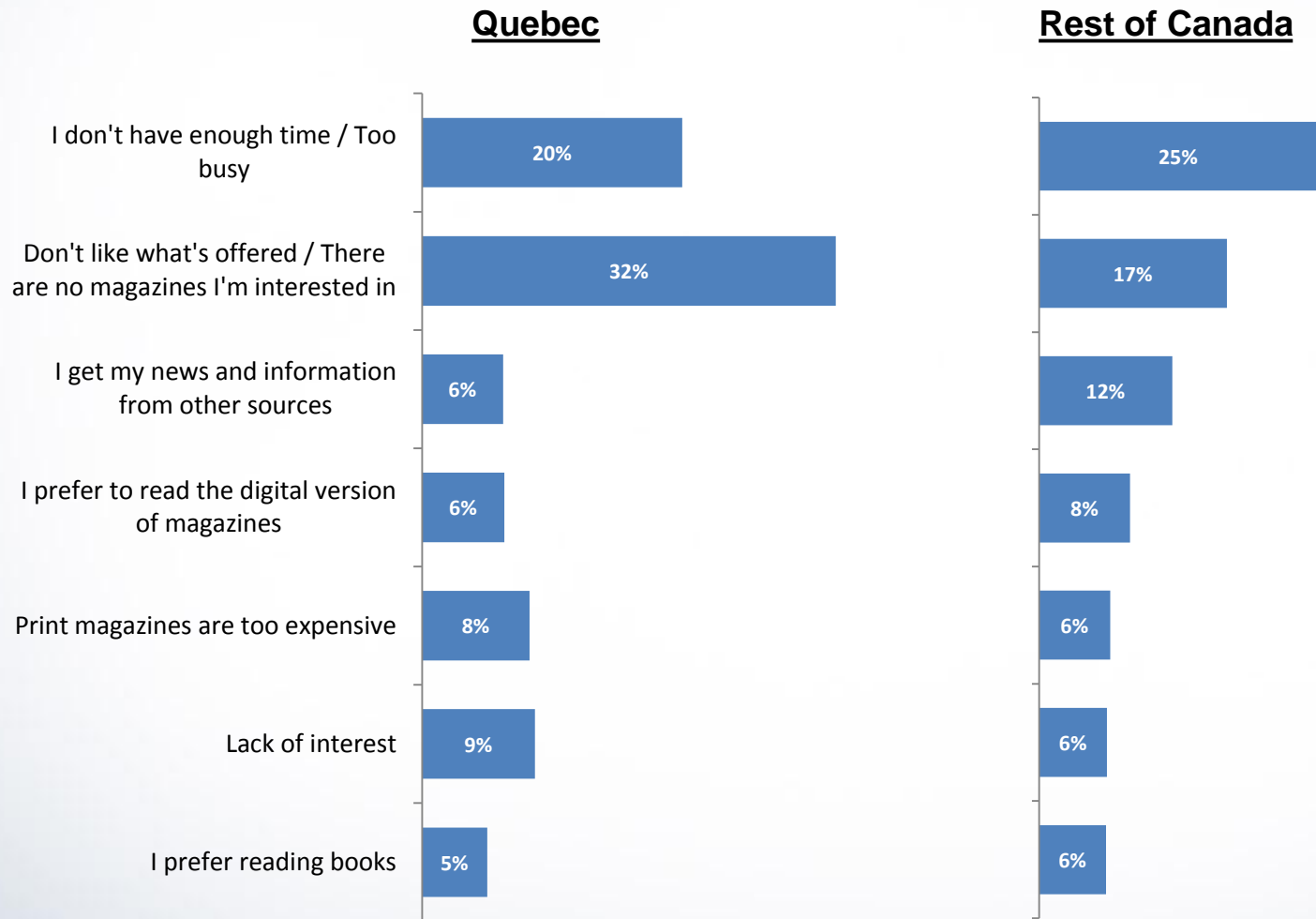
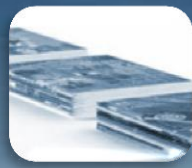


# Reasons for Not Reading Print Magazines

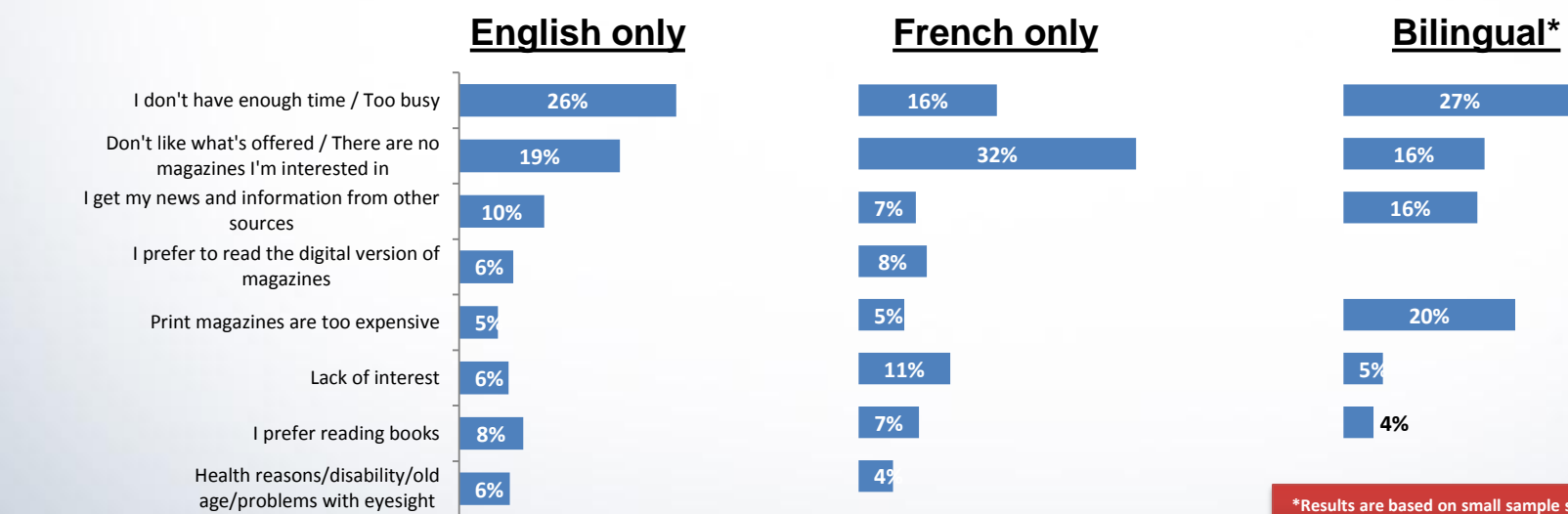
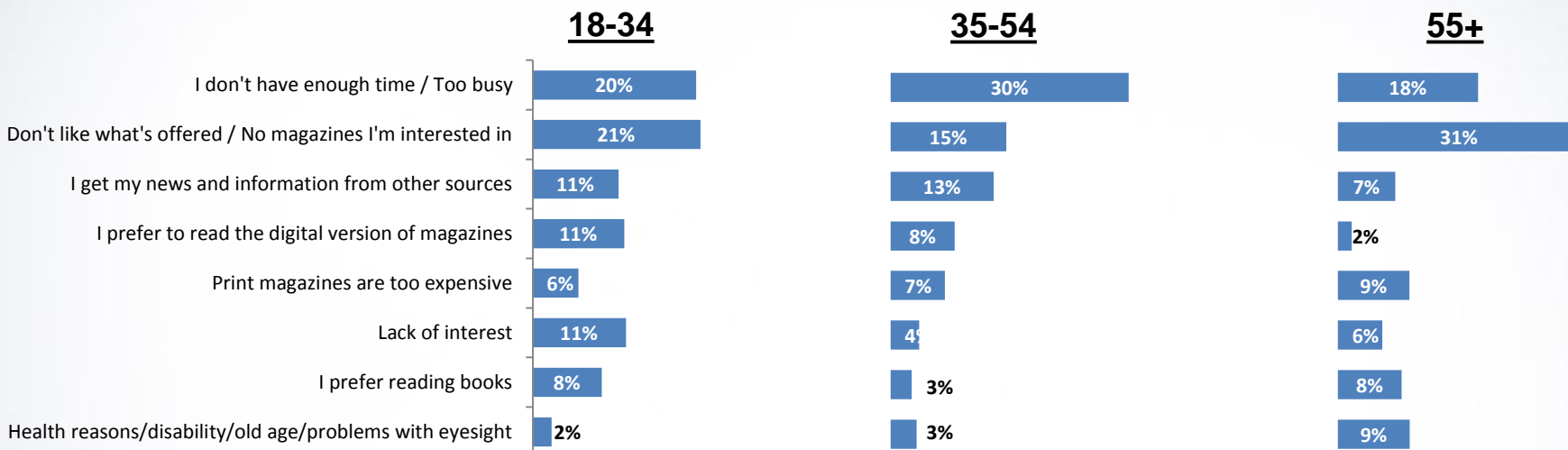


- The main two reasons for not reading print magazines are lack of time (24%) and lack of interest in what is offered (21%).
- Approximately 1 in 10 respondents say they do not read print magazines as they get their news from other sources, prefer to read the digital version, find print magazines expensive, or just have a general lack of interest in them.
- Other reasons include a preference for books over magazines, eyesight problems, a lack of availability of magazines, among others.
- Quebec residents, men, those at least 55 years old, or who speak only French at home, are more likely to say they do not read print magazines because they do not like what is offered.
- Ontario residents are more likely than Quebec residents to say they get their news from other sources, as well as residents in urban areas.
- Social media networkers and those with a household income of at least \$100K are more likely to say they prefer to read the digital version of magazines.

# Reasons for Not Reading Print Magazines – by Region



# Reasons for Not Reading Print Magazines – by Age and Language Spoken at Home



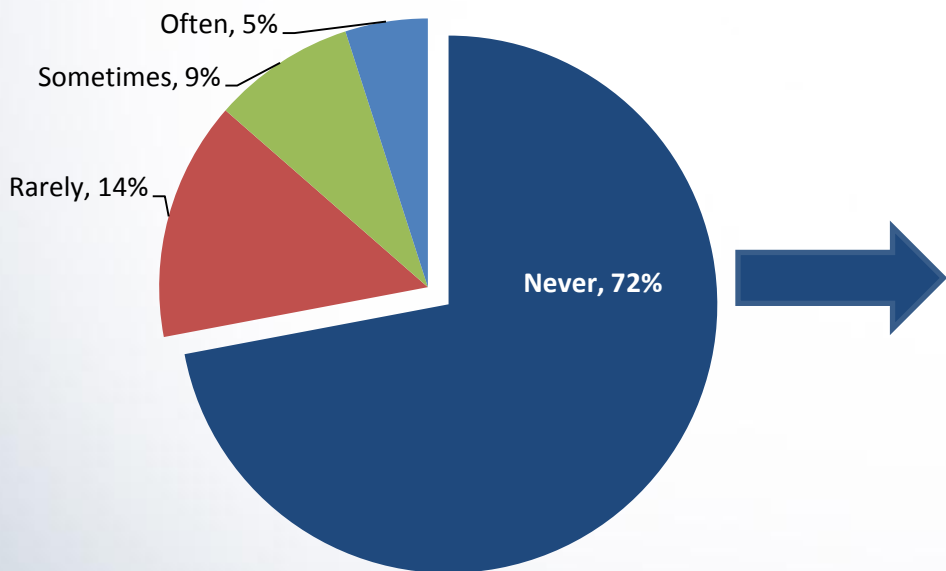
\*Results are based on small sample sizes. Please exercise caution when drawing conclusions from these results.

# Reading Digital Magazines

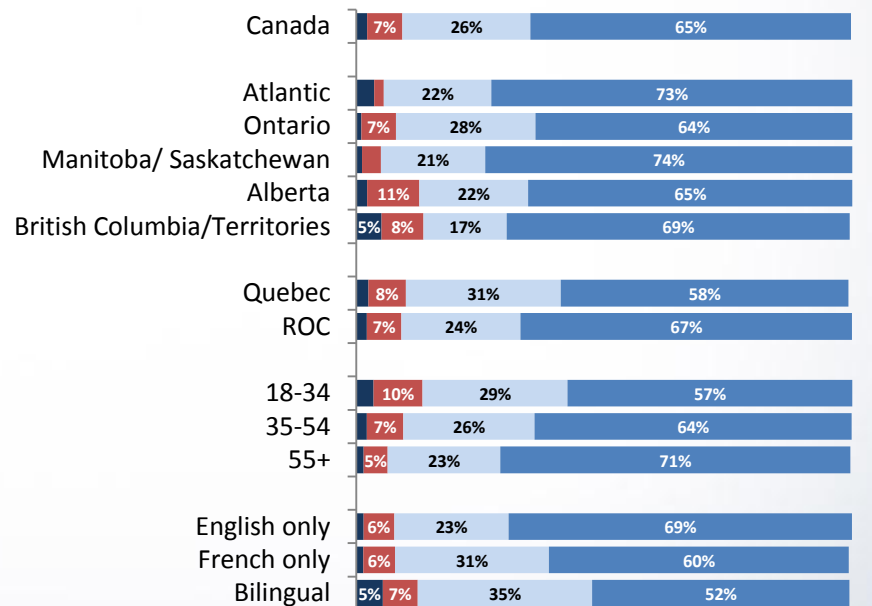


- Nearly three quarters of Canadians never read digital magazines, while 14% rarely do so, 9% sometimes, and 5% often.
- Among those who say that they do not read digital magazines, only 9% say they are very or somewhat likely to start reading digital magazines in the next 6 months. Residents of Quebec, Alberta and British Columbia are more likely to say this. Social media networkers, and respondents under 35 years of age, are also more likely to say they will start reading digital magazines in the near future.

**Reading Digital Magazines**



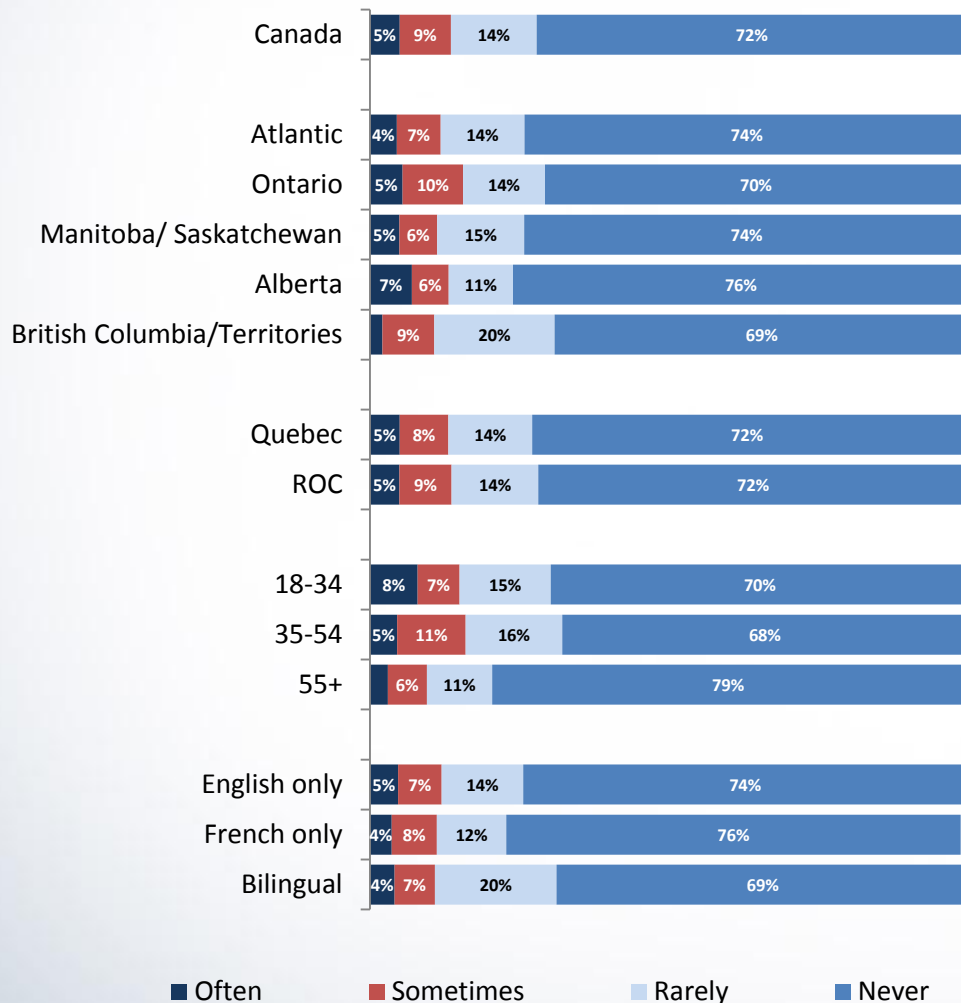
**Likelihood to start reading digital magazines**



■ Very likely 
 ■ Somewhat likely 
 ■ Somewhat unlikely 
 ■ Very unlikely

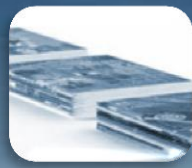


# Reading Digital Magazines



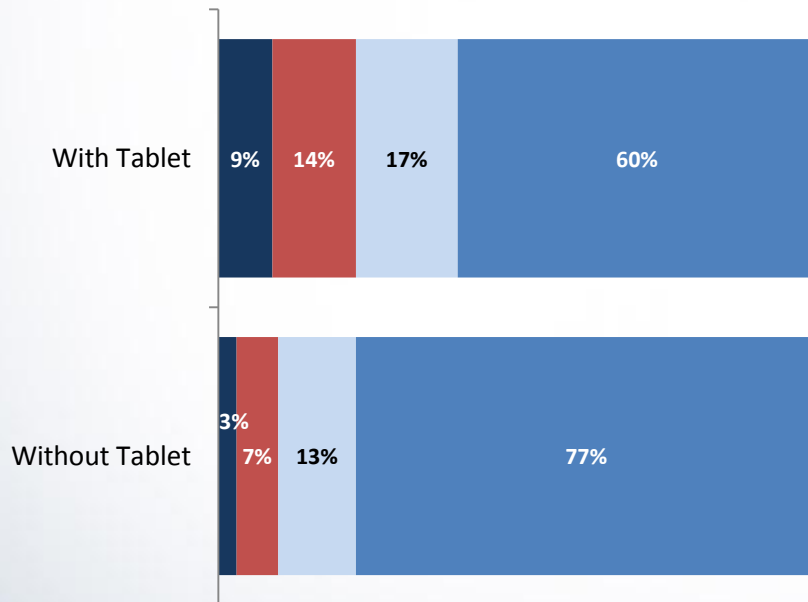
- Overall digital magazine readership is established by grouping respondents who say they read this magazine format either *often*, *sometimes* or *rarely*. Based on this approach, over one quarter of respondents (28%) say they read digital magazines.
- Ontarians are more likely than BC residents to say they *often* read digital magazines.
- Similarly, respondents under 55 years of age and bilingual respondents are more likely to read digital magazines. Those between 18 and 34 years of age are especially likely to say they *often* read digital magazines.
- From a technology and social media perspective, tablet owners and social media networkers are more likely to say they *often* read digital magazines.
- Detailed results for tablet owners are presented on the following page.

# Reading Digital Magazines Among Tablet Owners

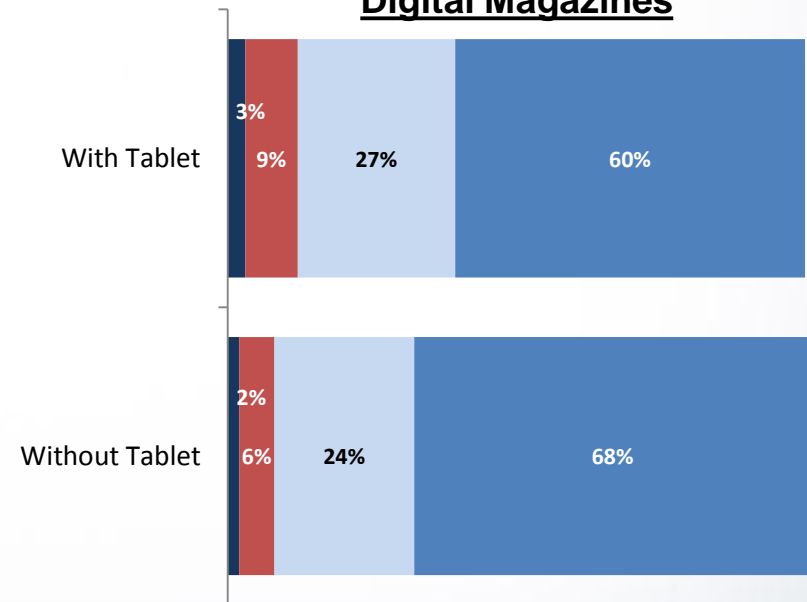


- Two in five tablet owners (40%) read digital magazines, while only 23% of non-owners say they read digital magazines.
- Similarly, among those who said they have never read digital magazines, tablet owners are more likely than non-owners to say they are likely to start reading digital magazines in the next six months (12% vs. 8%).

## Reading Digital Magazines



## Likelihood to Start Reading Digital Magazines



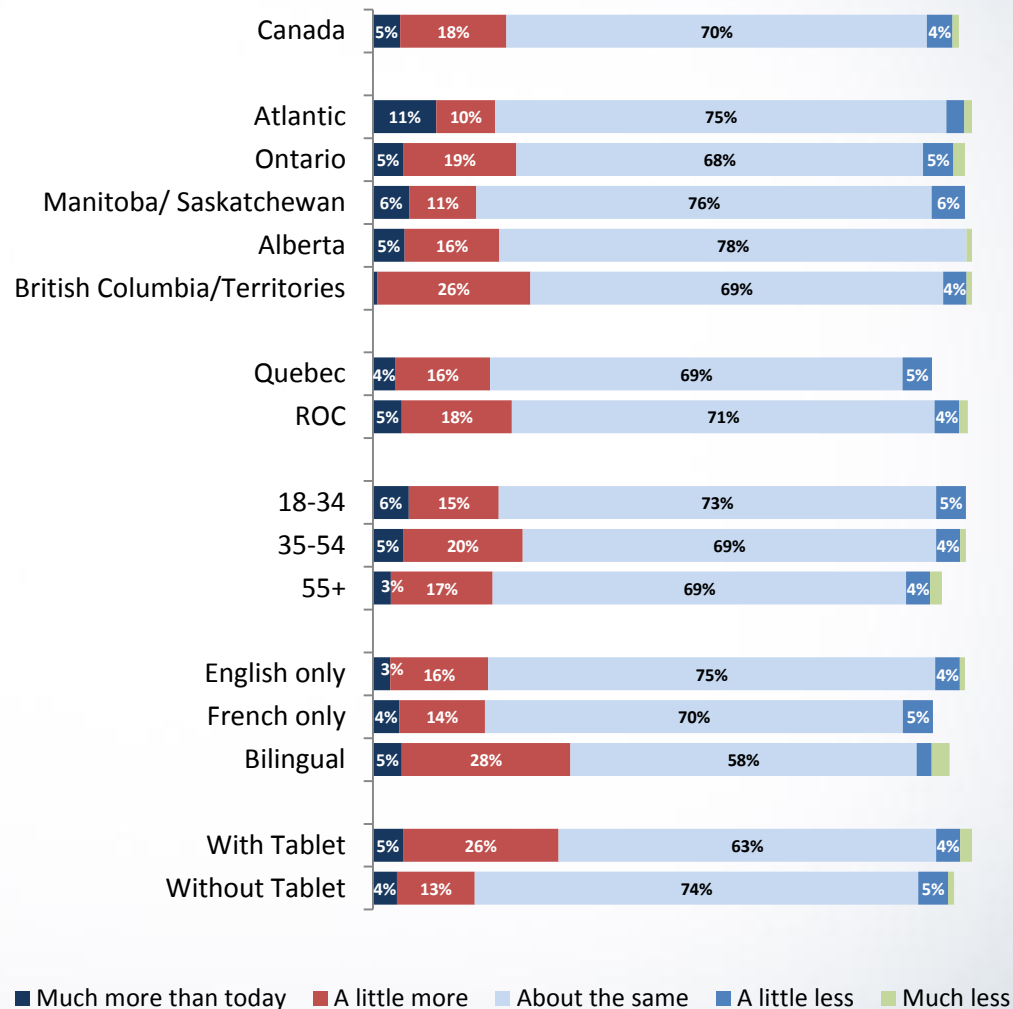
■ Often   
 ■ Sometimes   
 ■ Rarely   
 ■ Never

■ Very likely   
 ■ Somewhat likely   
 ■ Not very likely   
 ■ Not at all likely

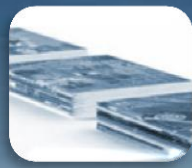
# Expected Reading of Digital Magazines



- Digital magazine readers were asked how much they expected to read electronically over the next 6 months. Close to one quarter (23%) say they will read much more or a little more than today, while 70% say they will read about the same, and 5% say they will read less than today.
- Results are quite even across all demographic segments.
- Tablet owners are nearly twice as likely as non-owners to say that in the next 6 months they will read digital magazines much more or a little more than today (31% vs. 17%).



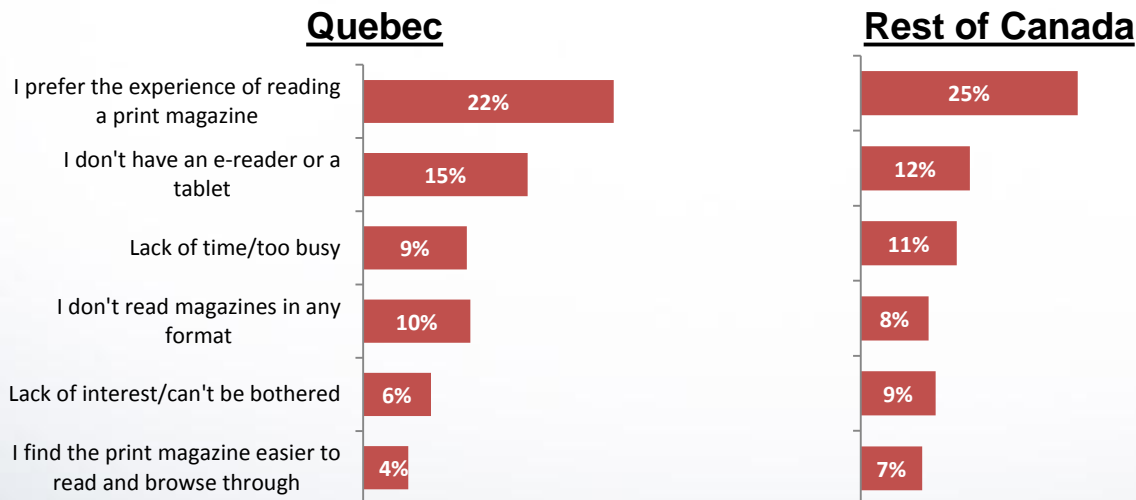
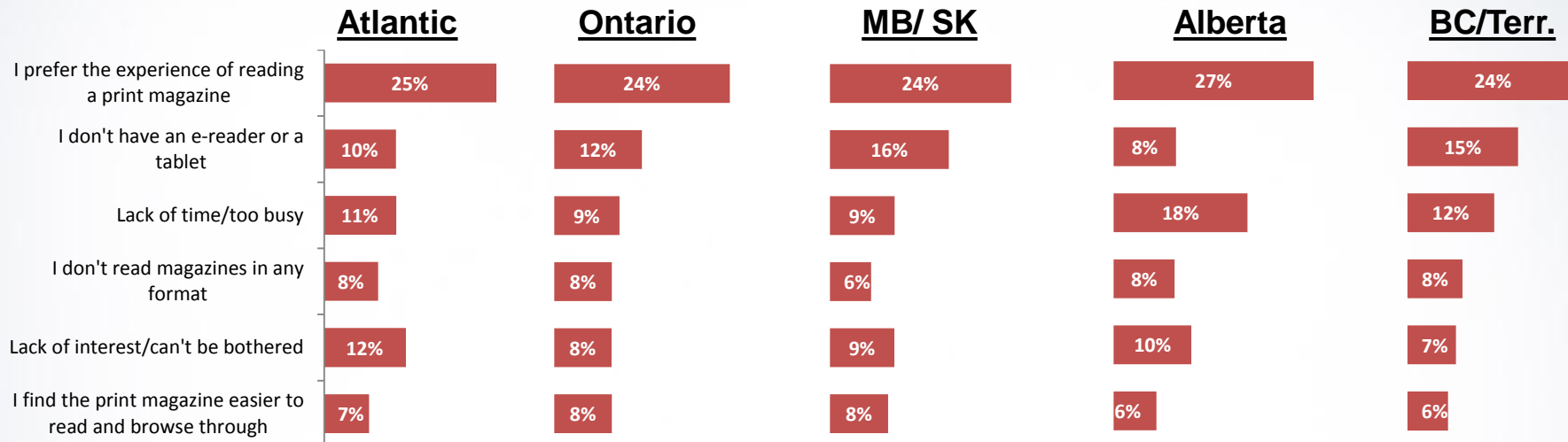
# Reasons for Not Reading Digital Magazines



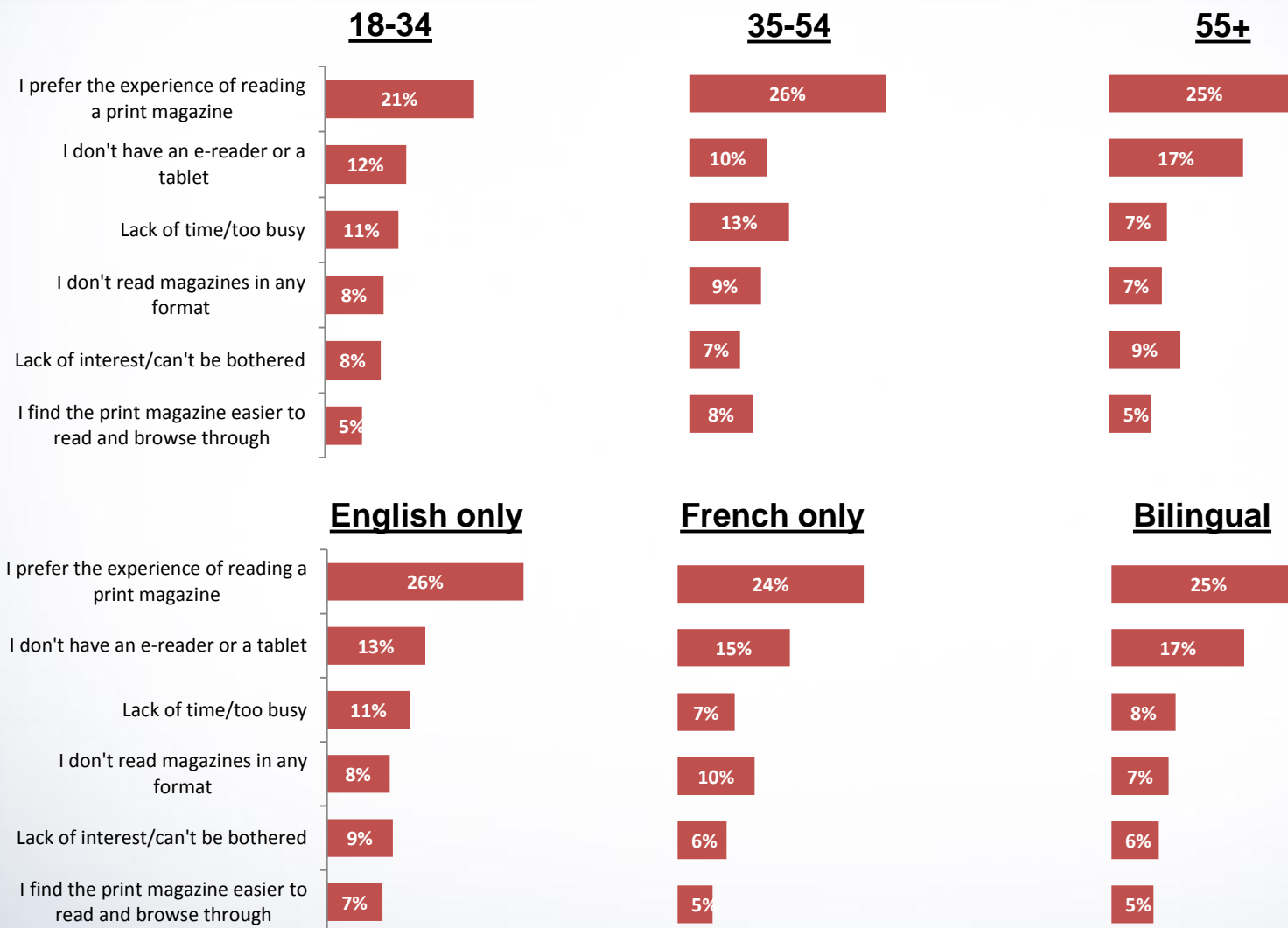
- The main reasons for not reading at all or not reading *more* digital magazines are that respondents prefer the experience of reading a print magazine (24%), they do not have an e-reader or a tablet (13%), or they do not have enough time (10%).
- Women are more likely to say they prefer the experience of reading a print magazine.
- Respondents with a household income under \$80K, who are over 54 years of age, and who are not social media networkers, are more likely to say they don't read digital magazines because they do not have an e-reader or a tablet.
- Albertans, respondents 35 to 54 years old, and social media networkers are more likely to say they don't read digital magazines because they are too busy and do not have time.

Main reasons for not reading digital magazines	%
I prefer the experience of reading a print magazine	24%
I don't have an e-reader or a tablet	13%
Lack of time/too busy	10%
I don't read magazines in any format	8%
Lack of interest/can't be bothered	8%
I find the print magazine easier to read and browse through	6%
I don't know how to get them	4%
It strains my eyes	3%
I cannot find a digital magazine on the topic that I am looking for	3%
Digital magazines are expensive	2%
Lack of awareness/knowledge/did not know about them	2%
The magazine I read does not have a digital version	1%
Lack of computer	1%
Other	9%

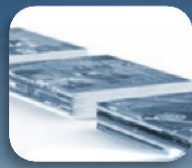
# Reasons for Not Reading Digital Magazines – by Region



# Reasons for Not Reading Digital Magazines – by Age and Language Spoken at Home



# Reasons for Not Reading Digital Magazines - Comparative Analysis



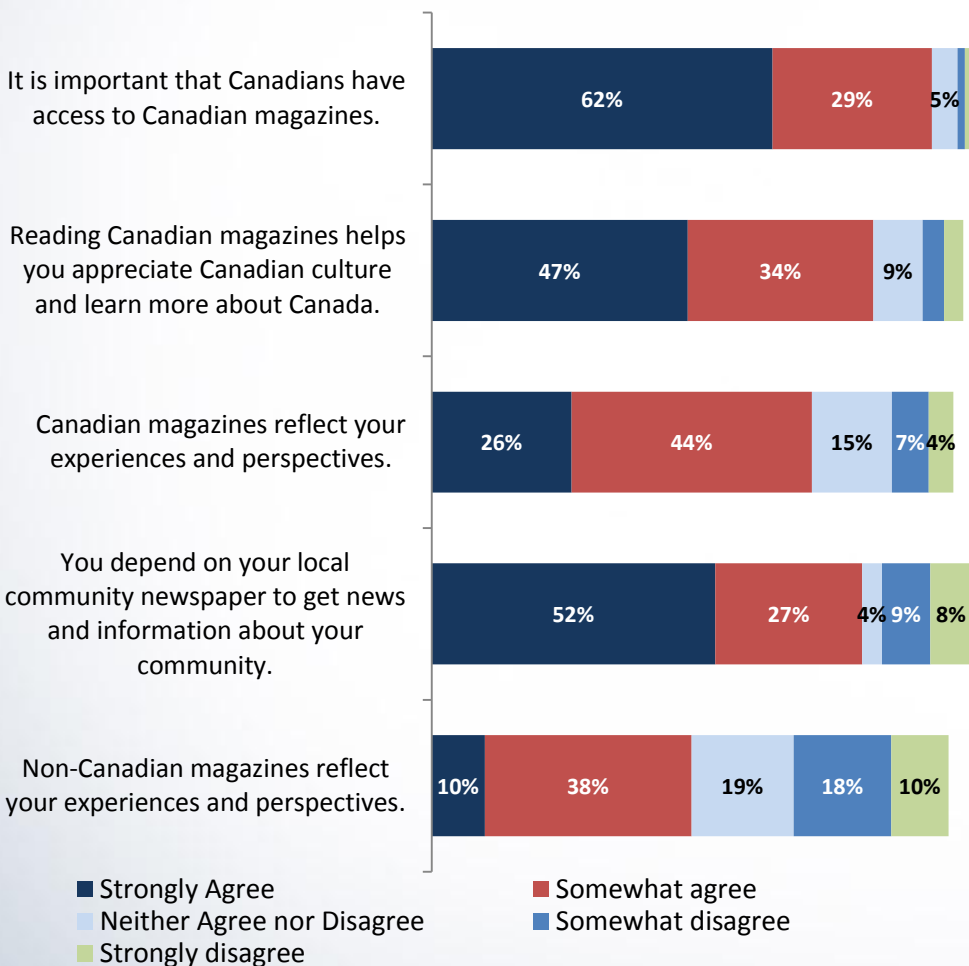
This comparative analysis involves different methodologies. The 2008 and 2012 data below is intended to illustrate a trend, but cannot be directly compared.

The more important barriers to reading digital magazines in 2008 seemed to be related to a lack of content, and the ability to access the magazines that were available at the time. In 2012, with many Canadians having experienced digital magazines, or at least aware of the technology needed to read them, the more important barriers relate to a preference for the print experience, over the digital one, and not having the technology to read electronic formats of magazines. As was the case in 2008, a lack of time was also a barrier in 2012.

Main reasons for not reading digital magazines (2012)	%
I prefer the experience of reading a print magazine	24%
I don't have an e-reader or a tablet	13%
Lack of time/too busy	10%
I don't read magazines in any format	8%
Lack of interest/can't be bothered	8%
I find the print magazine easier to read and browse through	6%
I don't know how to get them	4%
It strains my eyes	3%
I cannot find a digital magazine on the topic that I am looking for	3%
Digital magazines are expensive	2%
Lack of awareness/knowledge/did not know about them	2%
The magazine I read does not have a digital version	1%
Lack of computer	1%
Other	9%

Motivators to read more digital magazines (2008)	%
If the content was free	6%
More time	6%
If more content were available	6%
Not aware of digital magazines/Need to know more about them	4%
Easy access/accessible	3%
Better articles/stories	2%
If contents were searchable (including back issues)	2%
Interesting subjects/content	2%
Having/getting/knowing more about computers	2%
If the content was cheaper than print	2%
If better digital magazine readers were available	2%
If eye strain could be reduced	1%
Like print/paper/dislike reading on computer (general)	1%
Faster/better internet	1%
If hand-held devices were cheaper	1%
More publicity/advertising	1%
If pictures could be better	1%
Good for environment/less paper used	1%
Less publicity/advertising	<1%
Convenience	<1%
Good writers/journalists	<1%
Nothing can make me more interested	33%
Other	10%

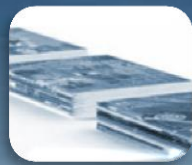
# Canadian Magazines and Canadian Culture



- Approximately 9 in 10 respondents agree that it is important that Canadians have access to Canadian magazines.
- While 4 in 5 respondents (81%) agree that reading Canadian magazines helps them to appreciate Canadian culture and learn more about Canada, 9% are neutral regarding this statement.
- Although seven in ten (70%) respondents strongly or somewhat agree that Canadian magazines reflect their experiences and perspectives, 15% are neutral.
- Just under 4 in 5 respondents agree that they depend on their local community newspaper to get news and information about their community.
- Less than half (48%) agree that non-Canadian magazines reflect their experiences and perspectives.



# Canadian Magazines and Canadian Culture



## Respondents who agree with these statements...

*It is important that Canadians have access to Canadian magazines*

## ...are more likely to be:

Women  
Speak only English at home

*Reading Canadian magazines helps me appreciate Canadian culture and learn more about Canada*

Residents of Ontario, Manitoba/ Saskatchewan, and British Columbia  
Speak only English at home

*Canadian magazines reflect my experiences and perspectives.*

Residents of Atlantic Canada, Ontario, Manitoba/ Saskatchewan, and British Columbia  
Speak only English at home

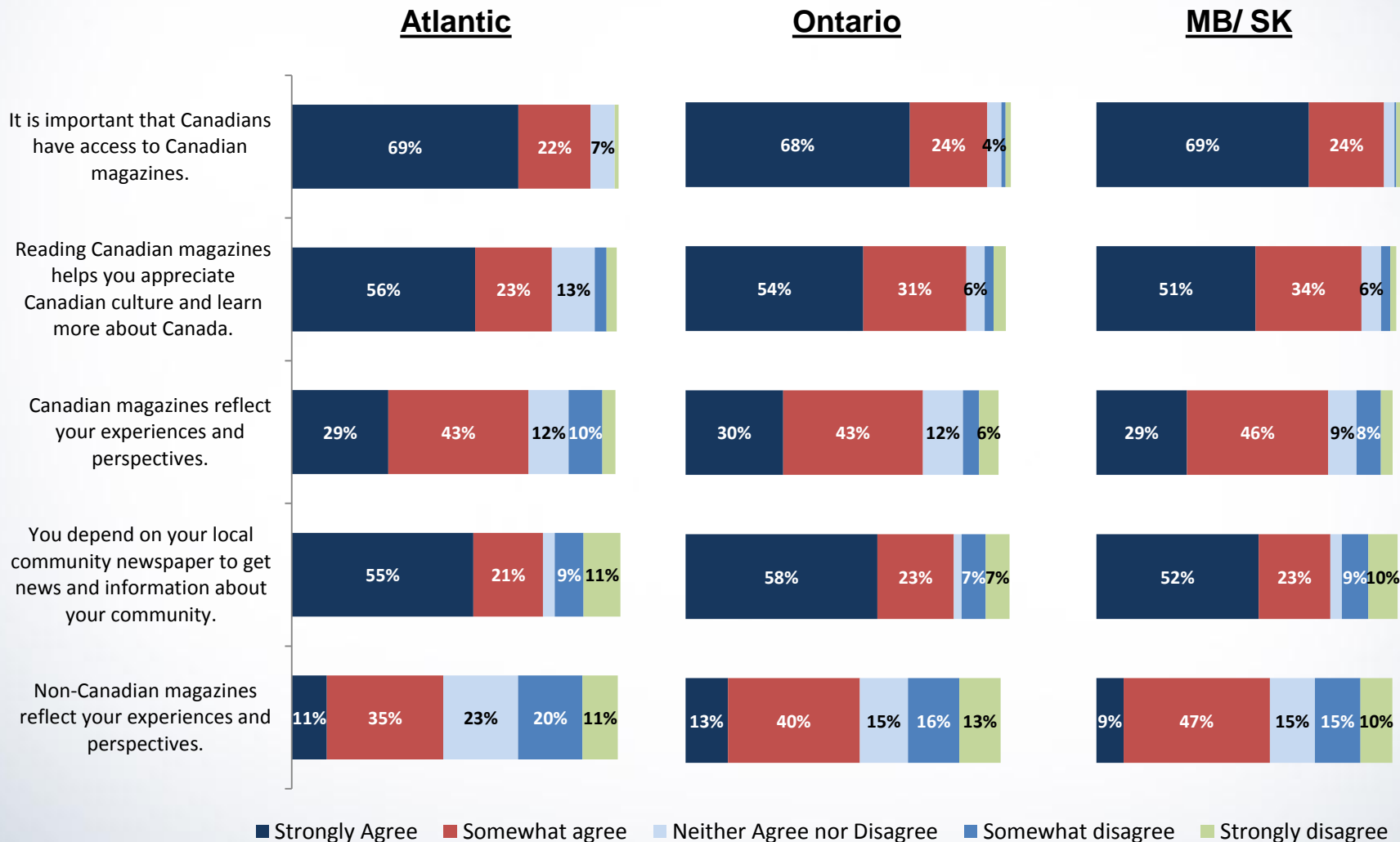
*I depend on my local community newspaper to get news and information about my community.*

Women  
Residents of Ontario (more than Quebec)  
At least 55 years old

*Non-Canadian magazines reflect my experiences and perspectives.*

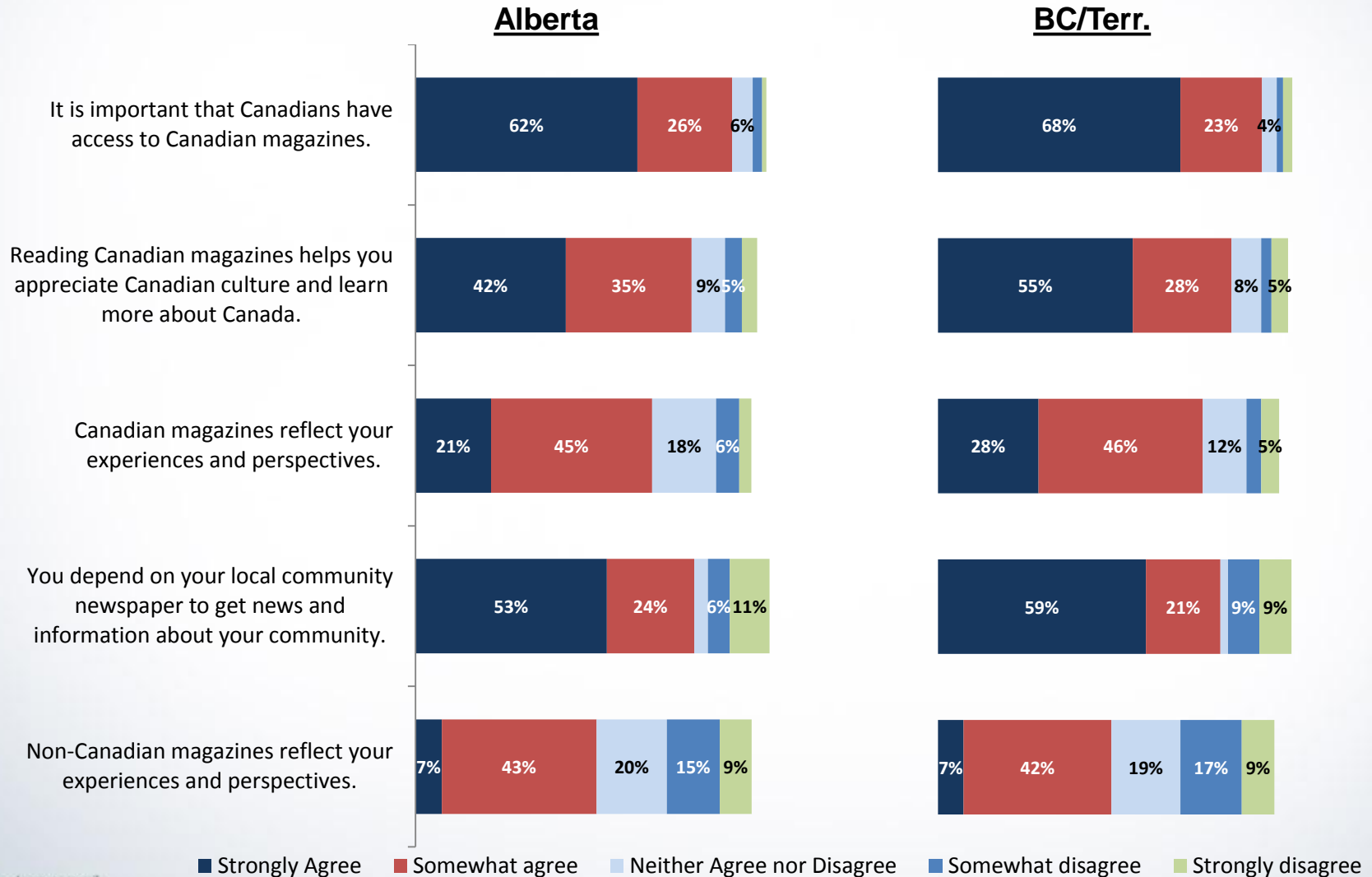
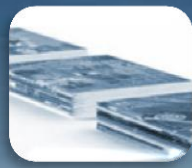
Least likely to be from Quebec  
Social media networkers  
Speak only English at home, or are bilingual

# Canadian Magazines and Canadian Culture – by Region

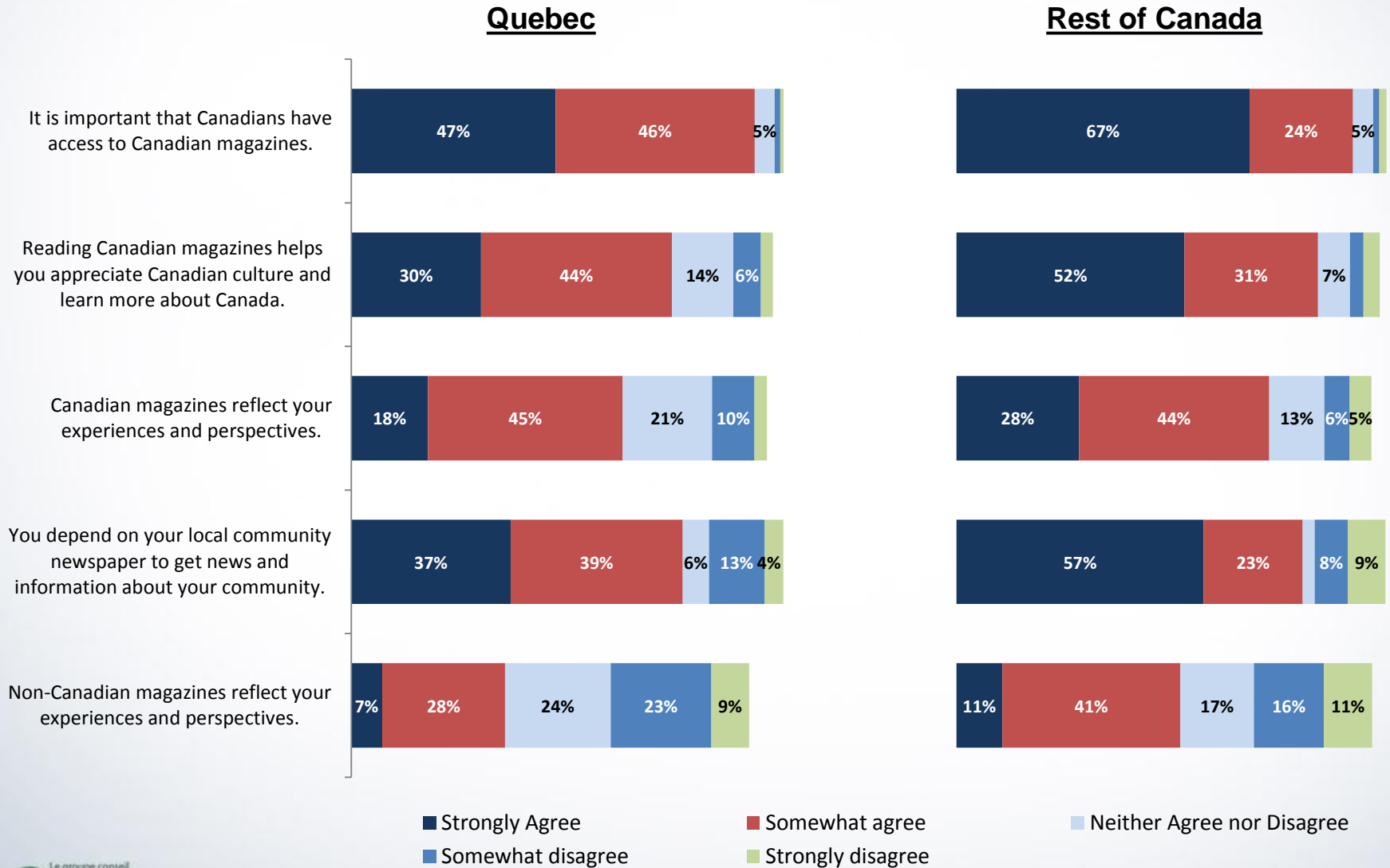
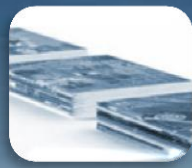


■ Strongly Agree  
 ■ Somewhat agree  
 ■ Neither Agree nor Disagree  
 ■ Somewhat disagree  
 ■ Strongly disagree

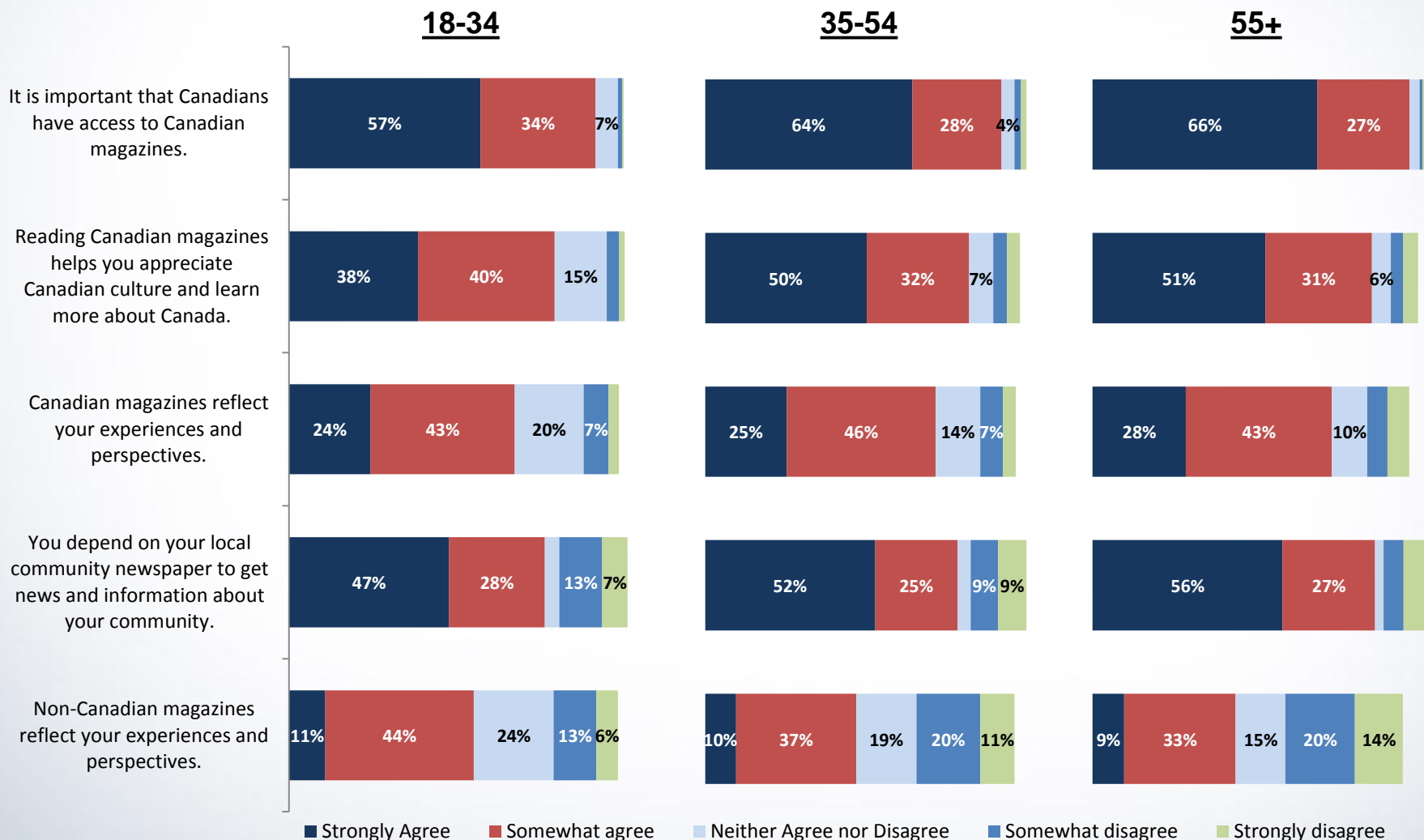
# Canadian Magazines and Canadian Culture – by Region



# Canadian Magazines and Canadian Culture – by Region

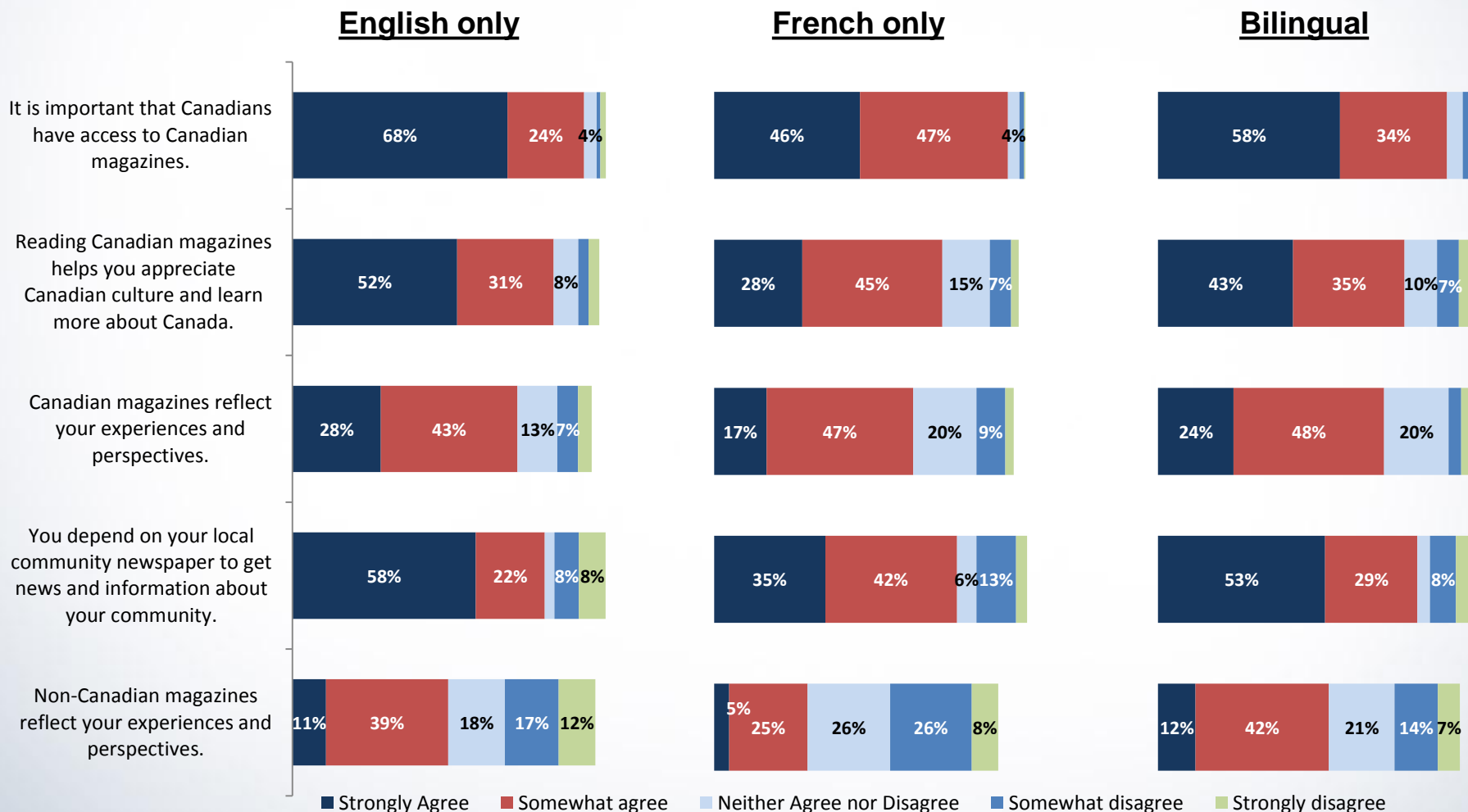


# Canadian Magazines and Canadian Culture – by Age

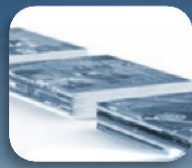


■ Strongly Agree   
 ■ Somewhat agree   
 ■ Neither Agree nor Disagree   
 ■ Somewhat disagree   
 ■ Strongly disagree

# Canadian Magazines and Canadian Culture – by Language Spoken at Home

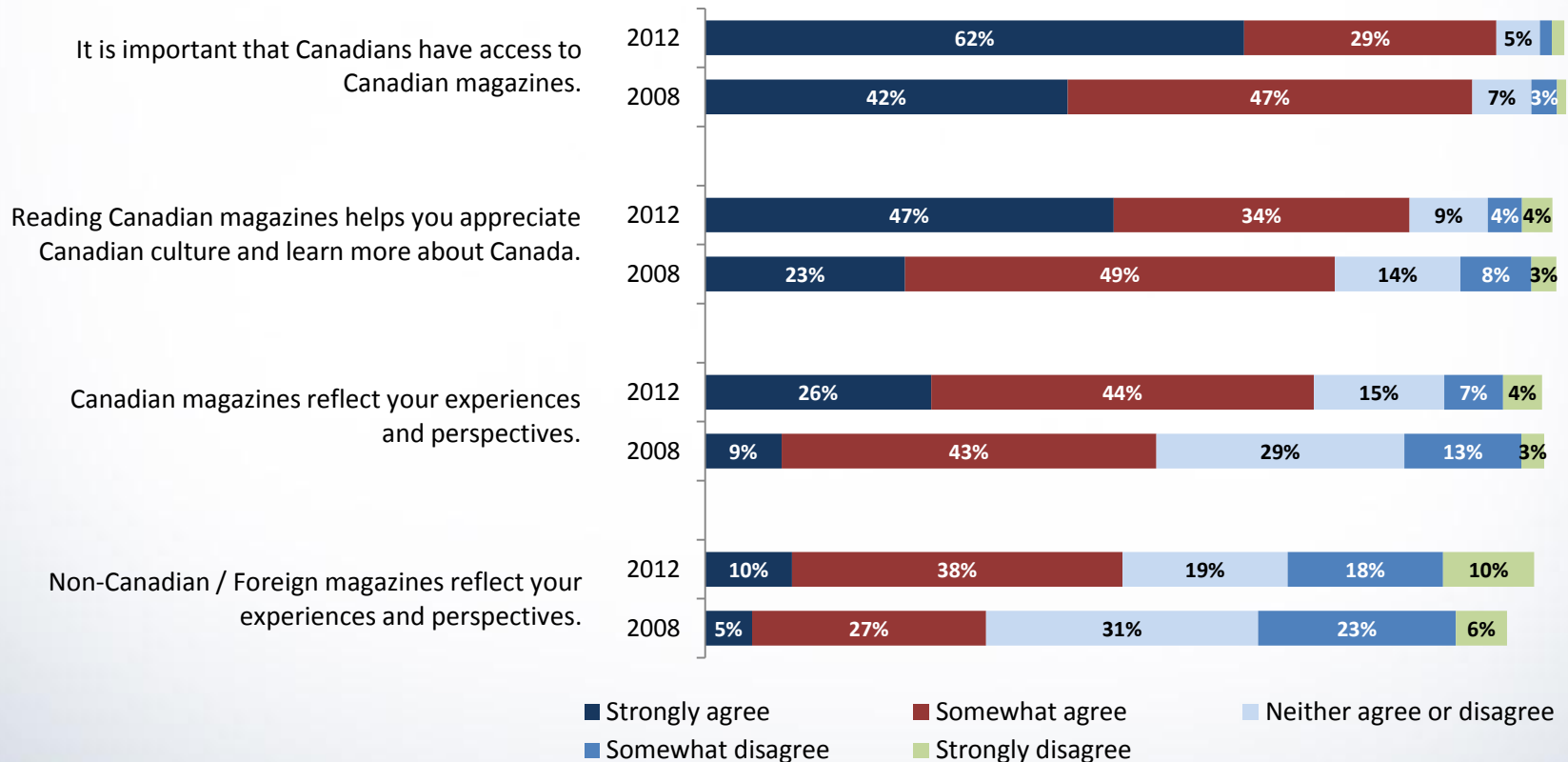


# Canadian Magazines and Canadian Culture - Comparative Analysis

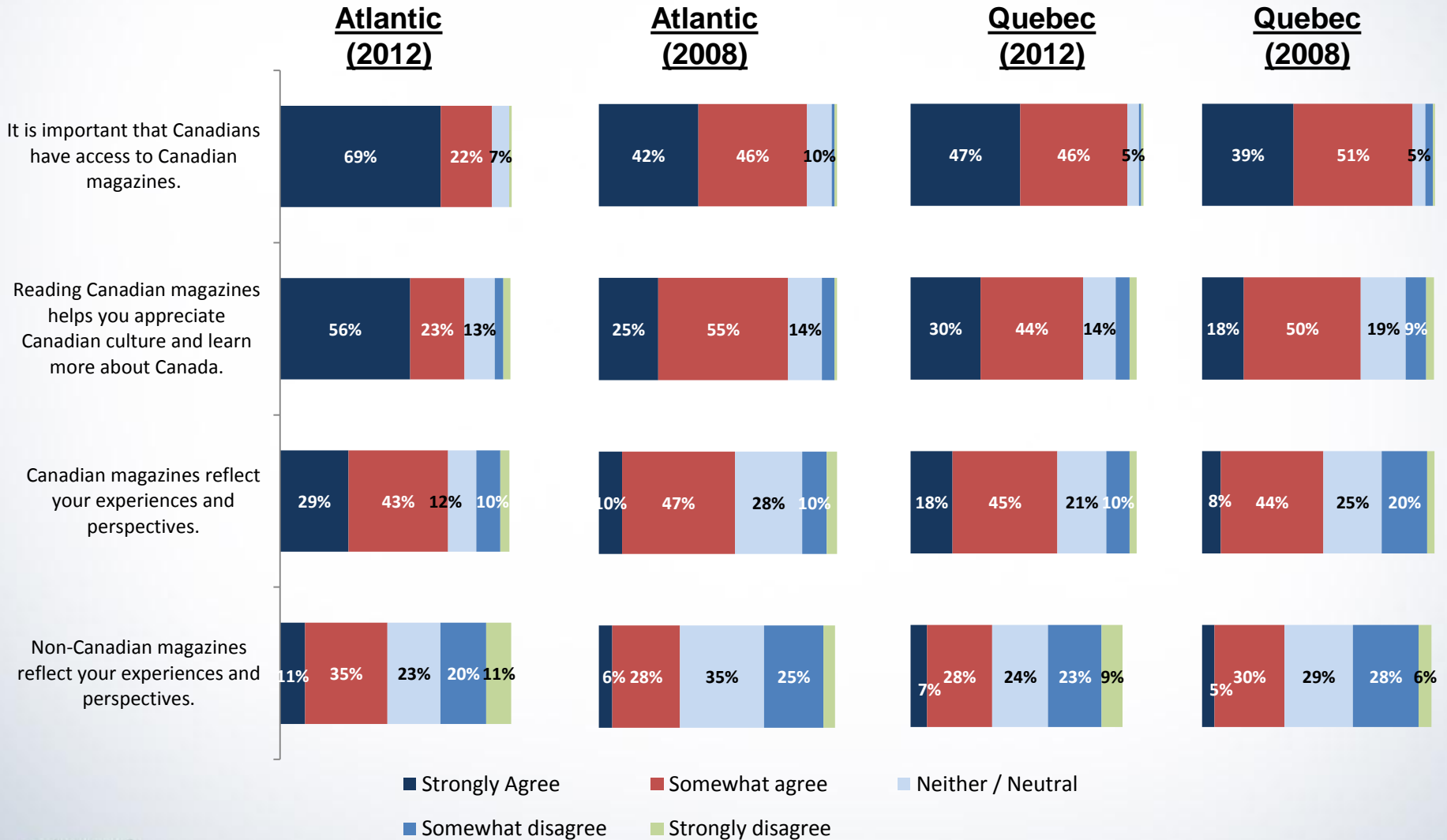
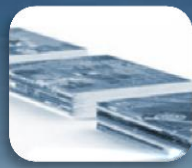


Compared to 2008, results for the 2012 study would suggest that Canadians are assigning a greater level of importance to access to Canadian magazines. They are also significantly more likely to believe Canadian magazines help them appreciate Canadian culture and learn more about Canada, and are much more likely to agree that Canadian magazines reflect their experiences and perspectives.

Results also show an increase in the proportion of Canadians who agree that non-Canadian magazines reflect their experiences and perspectives.

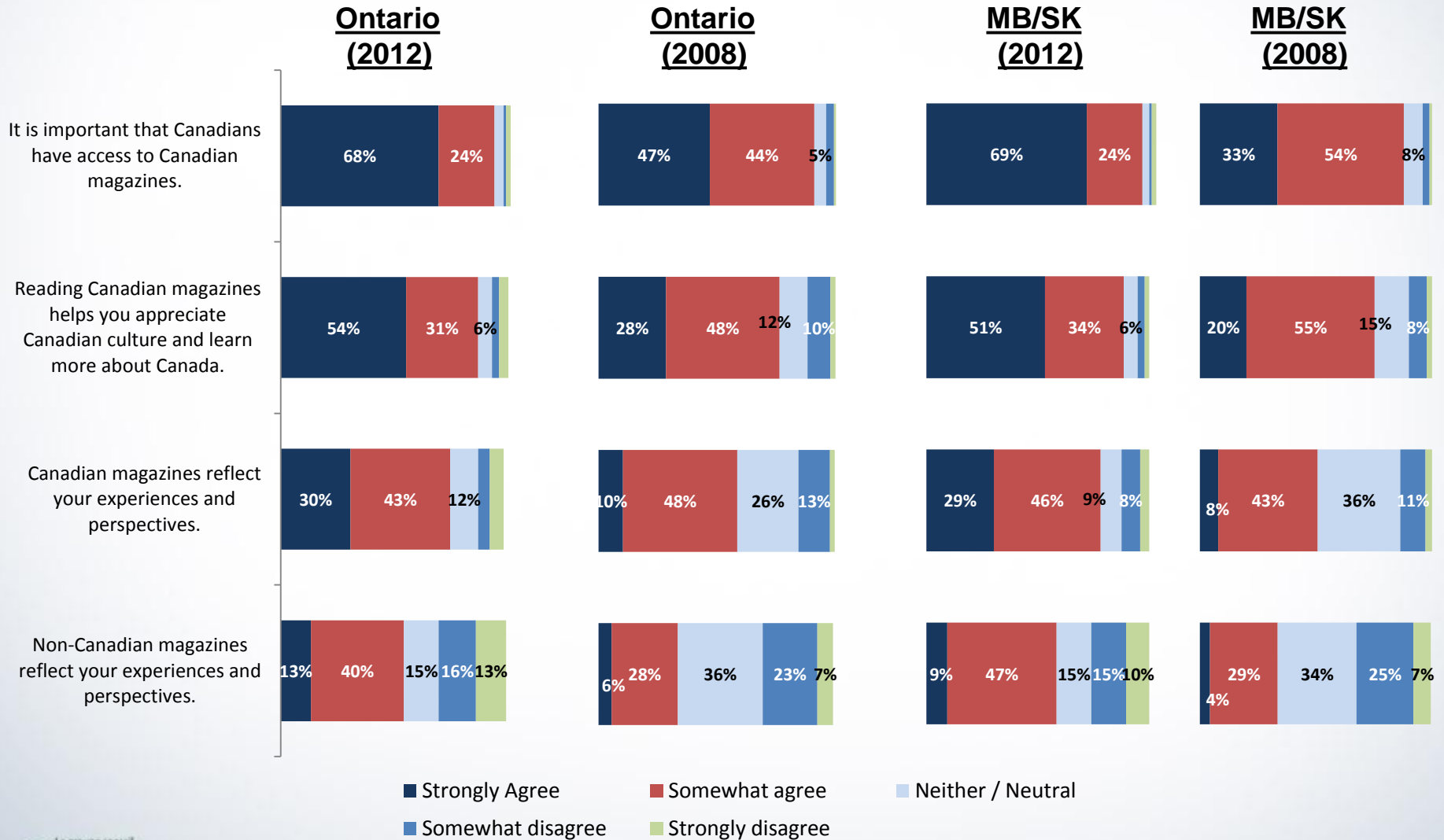


# Canadian Magazines and Canadian Culture - Comparative Analysis

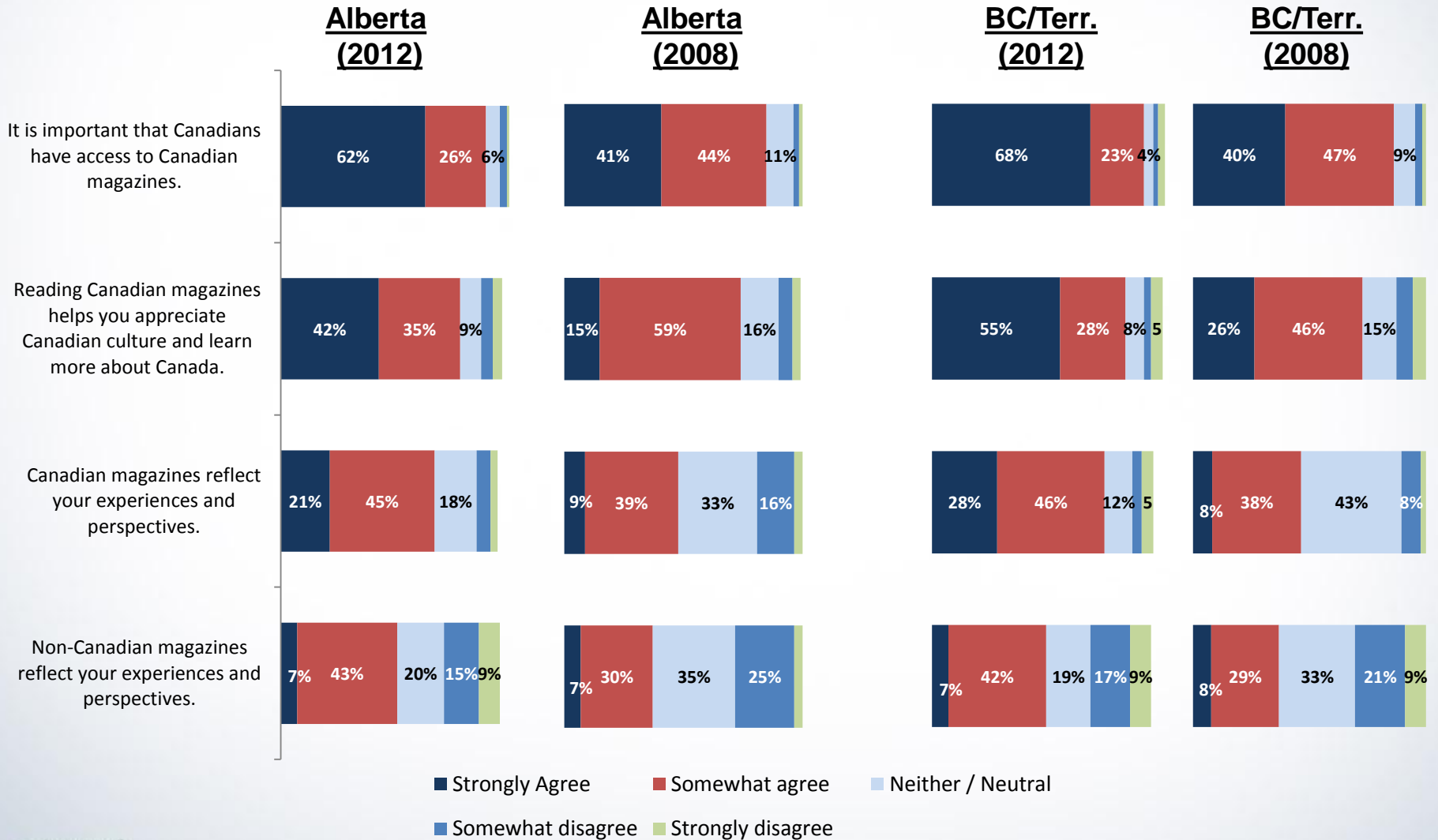
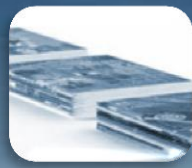




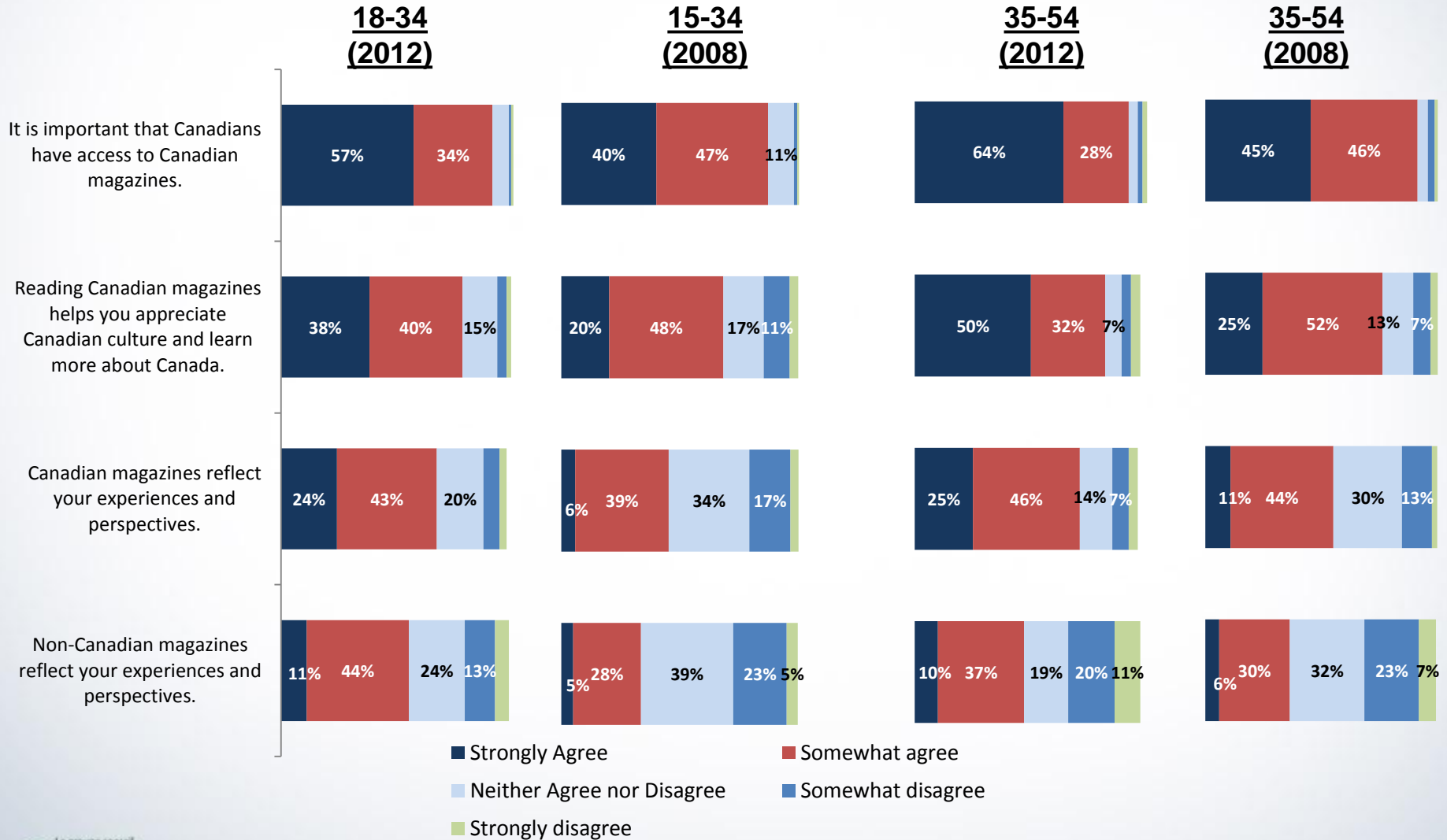
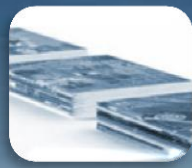
# Canadian Magazines and Canadian Culture - Comparative Analysis



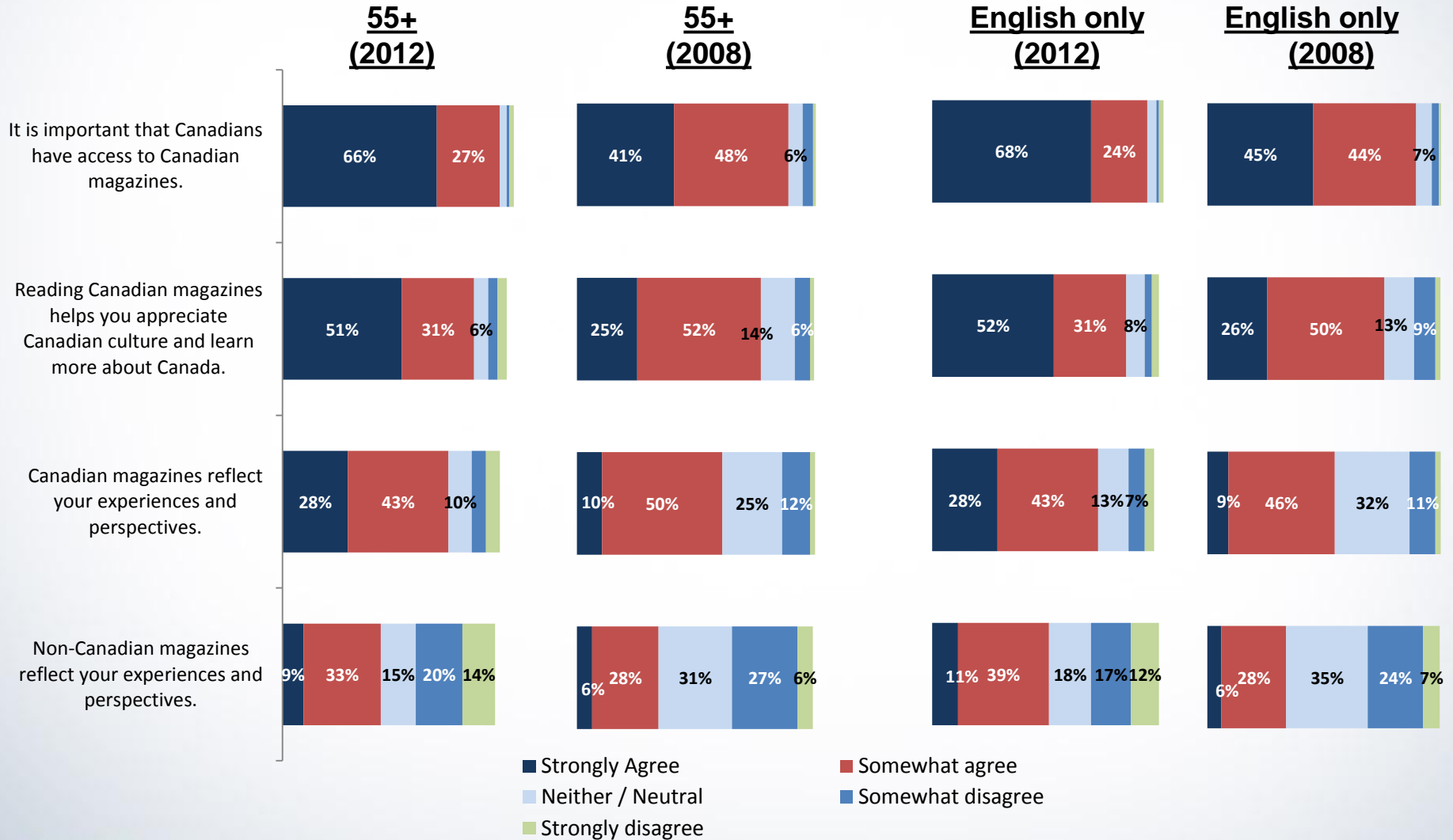
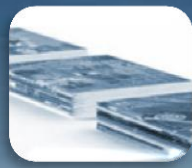
# Canadian Magazines and Canadian Culture - Comparative Analysis



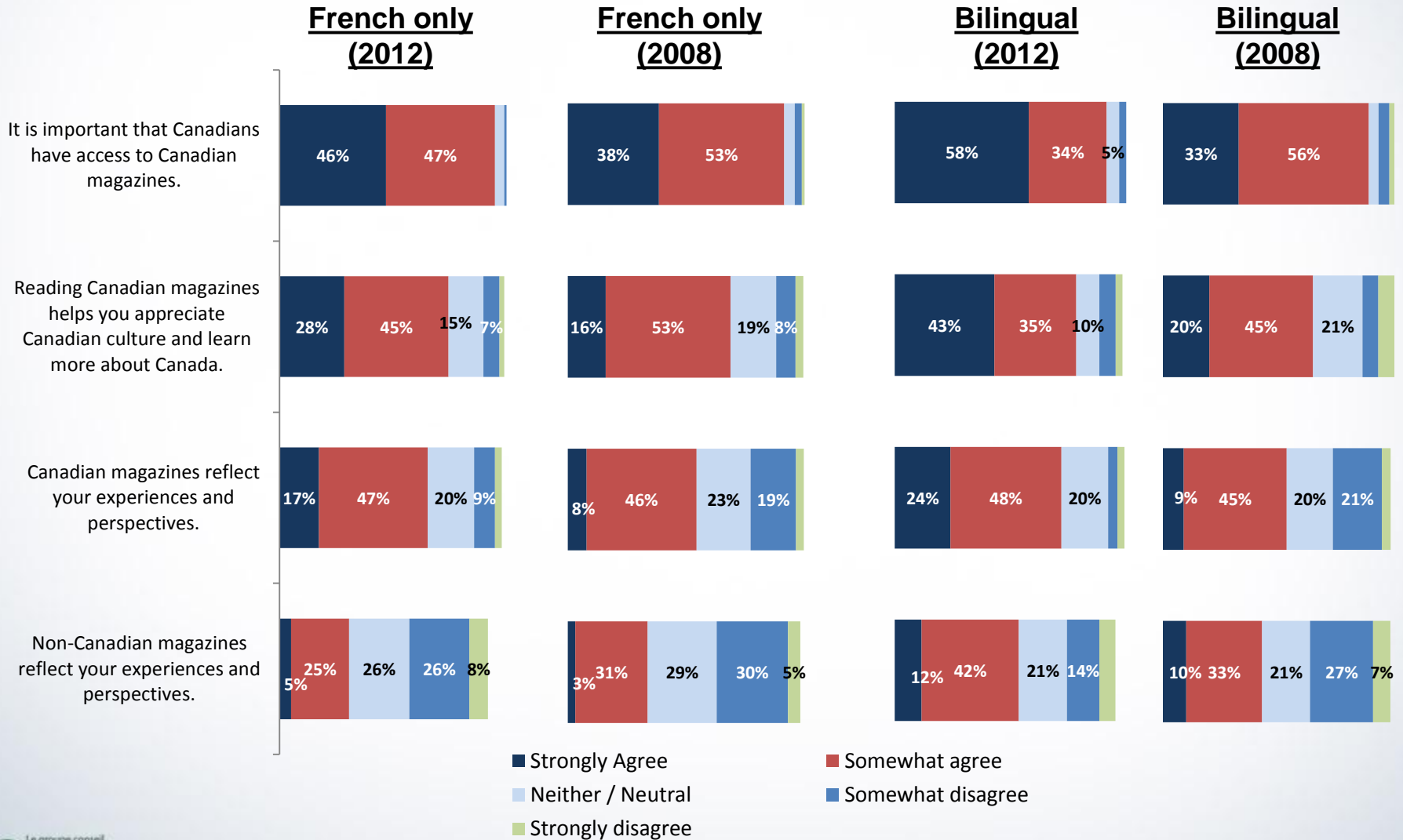
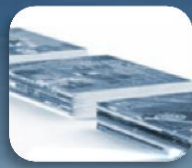
# Canadian Magazines and Canadian Culture - Comparative Analysis



# Canadian Magazines and Canadian Culture - Comparative Analysis



# Canadian Magazines and Canadian Culture - Comparative Analysis



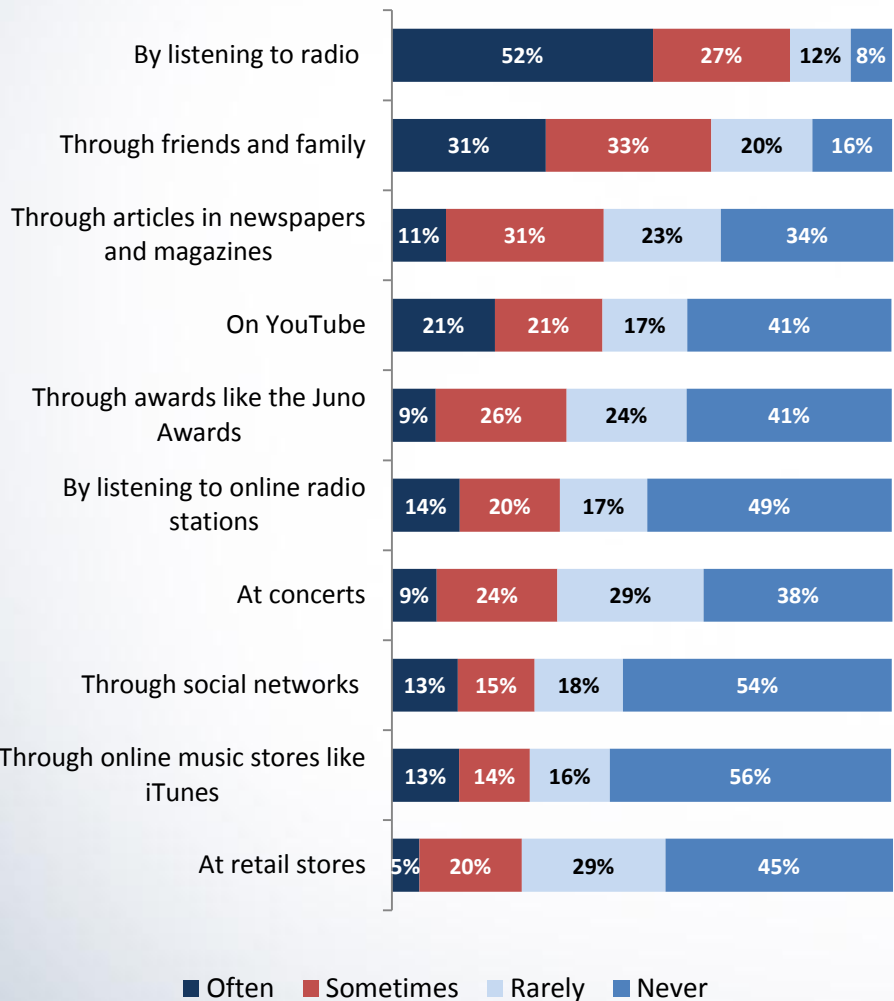
# Music



Canadian  
Heritage

Patrimoine  
canadien

# How Canadians Discover New Music



- The radio is the most popular way of discovering new music for Canadians. Over half (52%) say they *often* discover music this way, while one quarter (27%) say they *sometimes* discover music by listening to radio.
- Nearly two-thirds (64%) say they *often* or *sometimes* discover new music through friends and family, while 42% say they discover new music through articles in newspapers and magazines. A similar proportion discover music on YouTube although it is worth noting that 21% do so *often*.
- Approximately 1 in 3 Canadians discover new music at concerts (33%), by listening to online radio stations (34%), and through awards ceremonies (35%).
- Between 25% and 30% discover new music retail stores (25%), through social networks (28%), and through online music stores like iTunes (27%).
- Atlantic, Ontario and Alberta residents are the most likely to discover new music *often* by listening to radio. Women, social media networkers and those under 55 years old are also more likely to say they *often* discover new music by listening to the radio.

# How Canadians Discover New Music



Respondents more likely to discover music *often* through **friends and family** are:  
Ontarians and Quebecers  
Social media networkers  
Speak only French at home  
Under 54 years of age  
The older respondents are the less frequently they learn about music through friends and family.

**Articles in newspapers and magazines** are more likely to *often* be the music discovery venue for:  
Quebecers  
Respondents who speak only French at home  
Over 55 year olds

Ontarians and British Columbians are most likely to learn about new music by attending **concerts**.

**YouTube** is more likely to be used *often* to discover music by:  
Urban residents  
Men  
HH income under \$80K  
Smartphone, PDMP, and tablet owners  
Social media networkers  
Speak only French at home or are bilingual  
Under 35 years of age

Those more likely to discover new music through **awards** events are:  
Quebec residents  
Speak only French at home,  
Over 55 years old

Smartphone owners are more likely than those without a Smartphone to say they discover music through social networks, YouTube and online music stores. They are also more likely to say they discover music *often* through friends and family or by listening to radio.

**Online music stores** like iTunes are more likely to be used for music discovery by the following groups:  
Albertan residents  
Urban residents  
HH of least \$60K  
Smartphone or tablet owners  
Social media networkers  
Under 35 years of age

Manitoba and Saskatchewan residents are the least likely to say they discover new music through **social networks**.

Social media users, respondents who speak only French at home or are bilingual, are more likely to say they *often* discover new music by listening to **online radio stations**.

Quebec residents, men, and respondents who only speak French at home are more likely to say they discover new music *often* at **retail stores**.





# How Canadians Discover New Music – by Region



## Atlantic

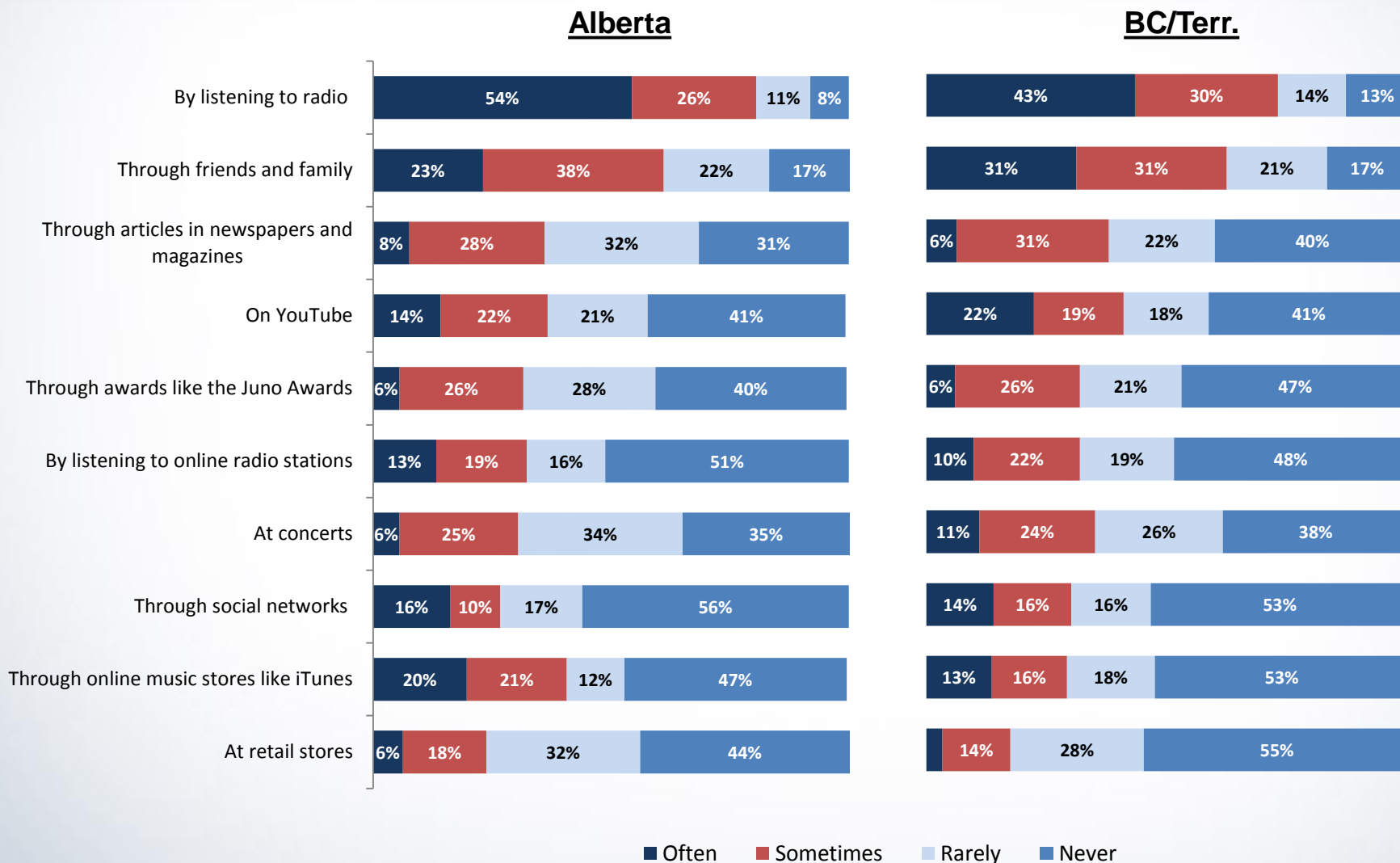
## Ontario

## MB/ SK



■ Often ■ Sometimes ■ Rarely ■ Never

# How Canadians Discover New Music – by Region



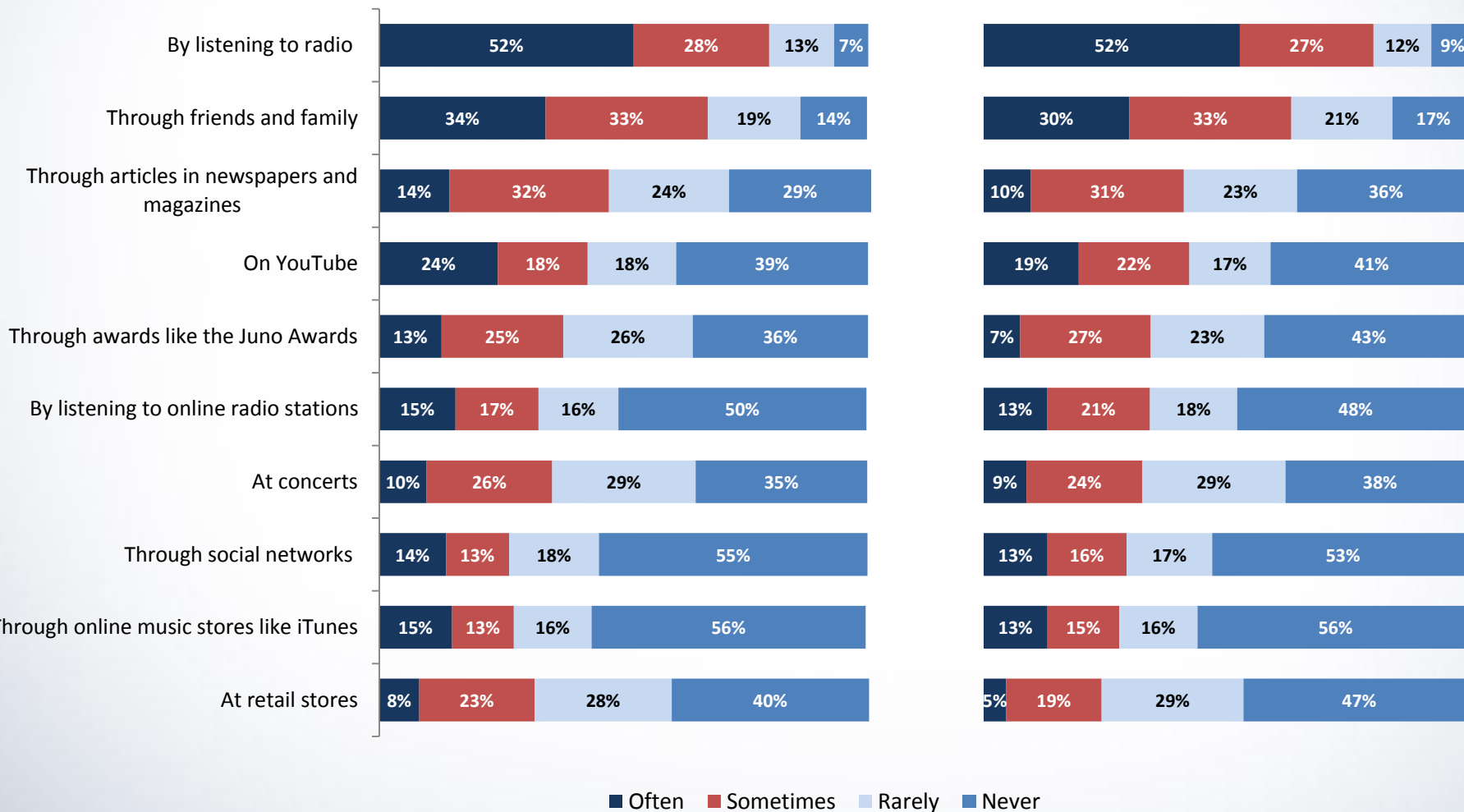
E1. I now have a few questions about music. Do you **discover new music** often, sometimes, rarely or never ...  
 Base: All respondents; n=2,003

# How Canadians Discover New Music – by Region

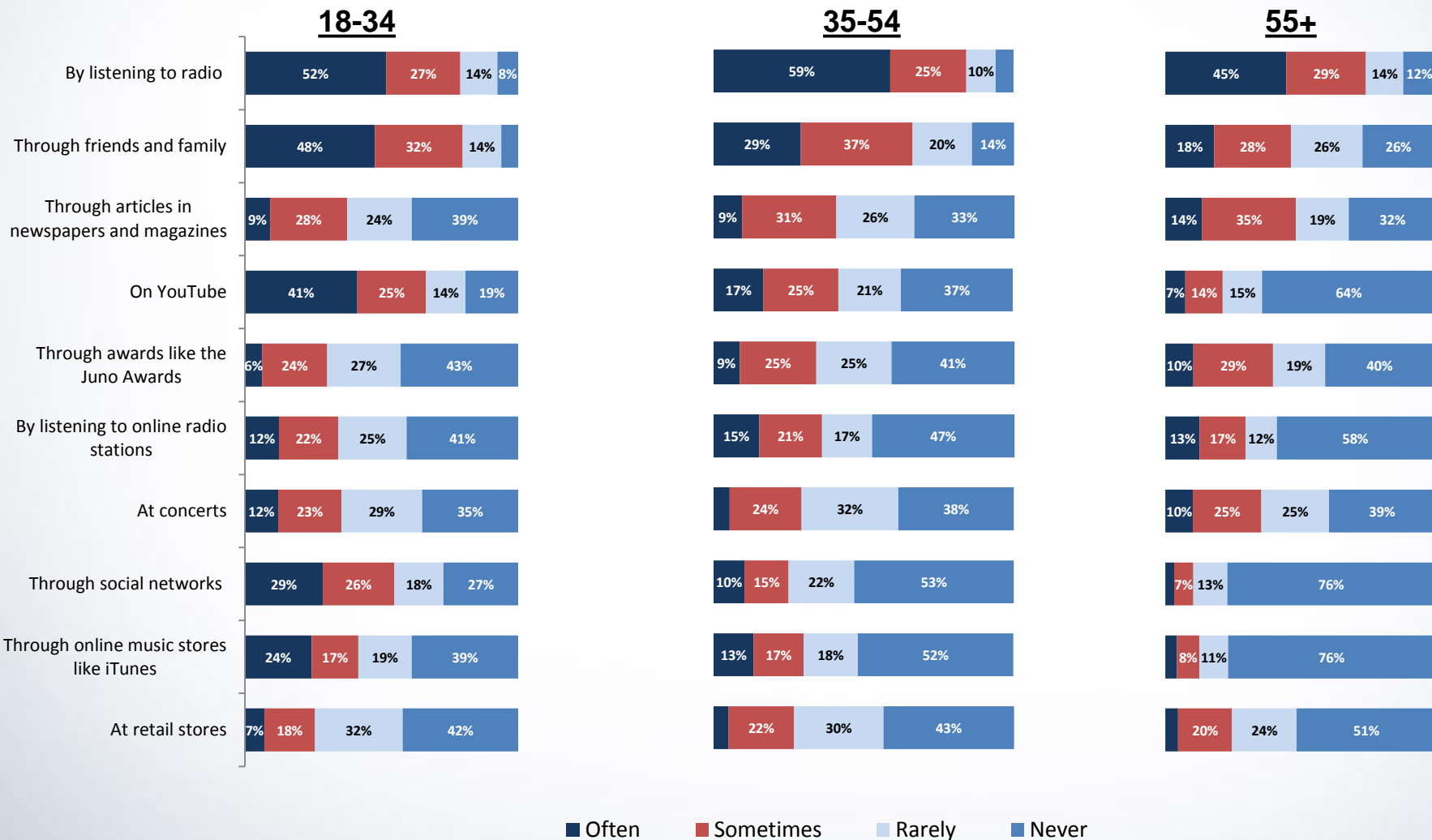


## Quebec

## Rest of Canada

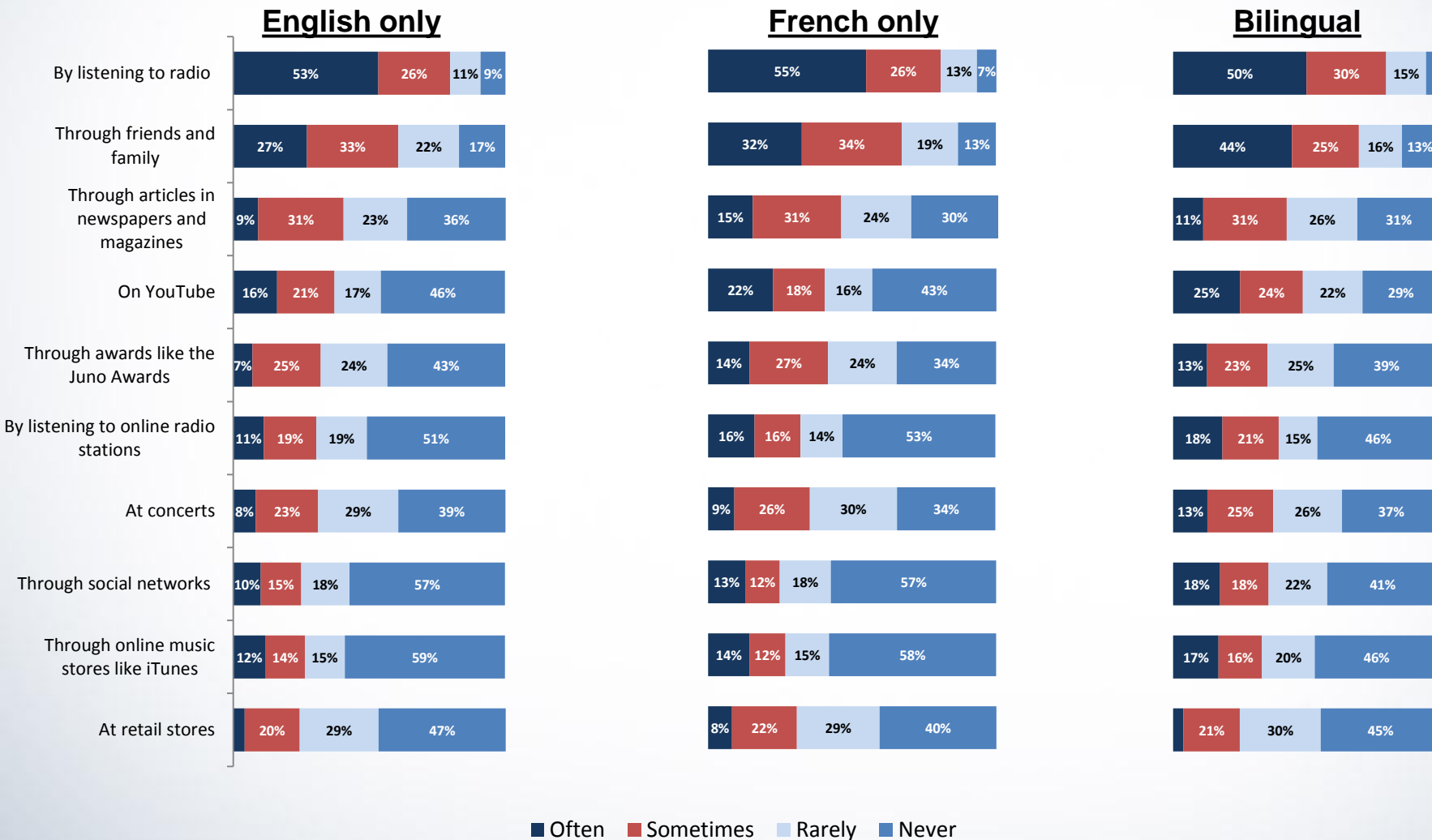


# How Canadians Discover New Music – by Age

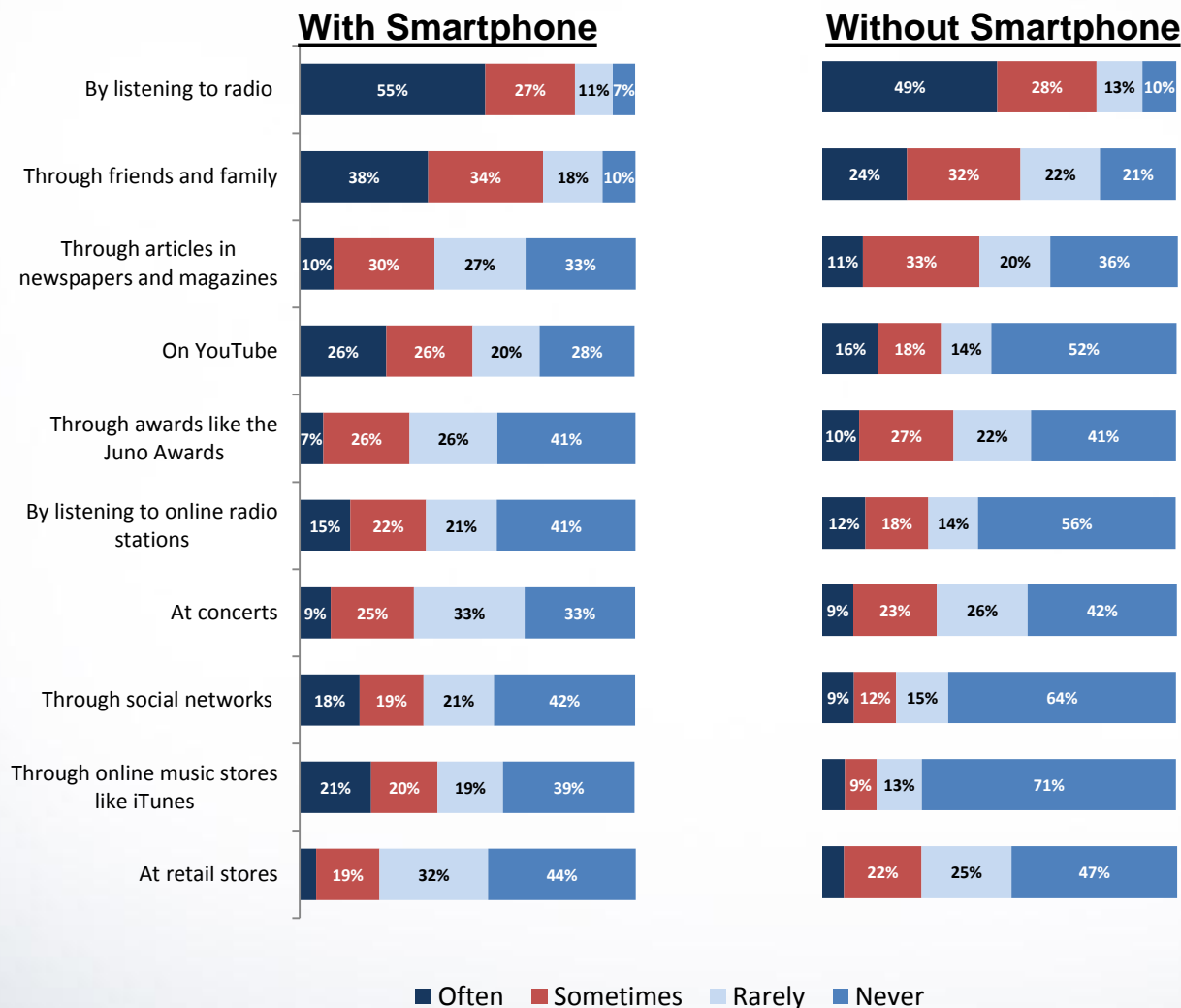


E1. I now have a few questions about music. Do you **discover new music** often, sometimes, rarely or never ...  
 Base: All respondents; n=2,003

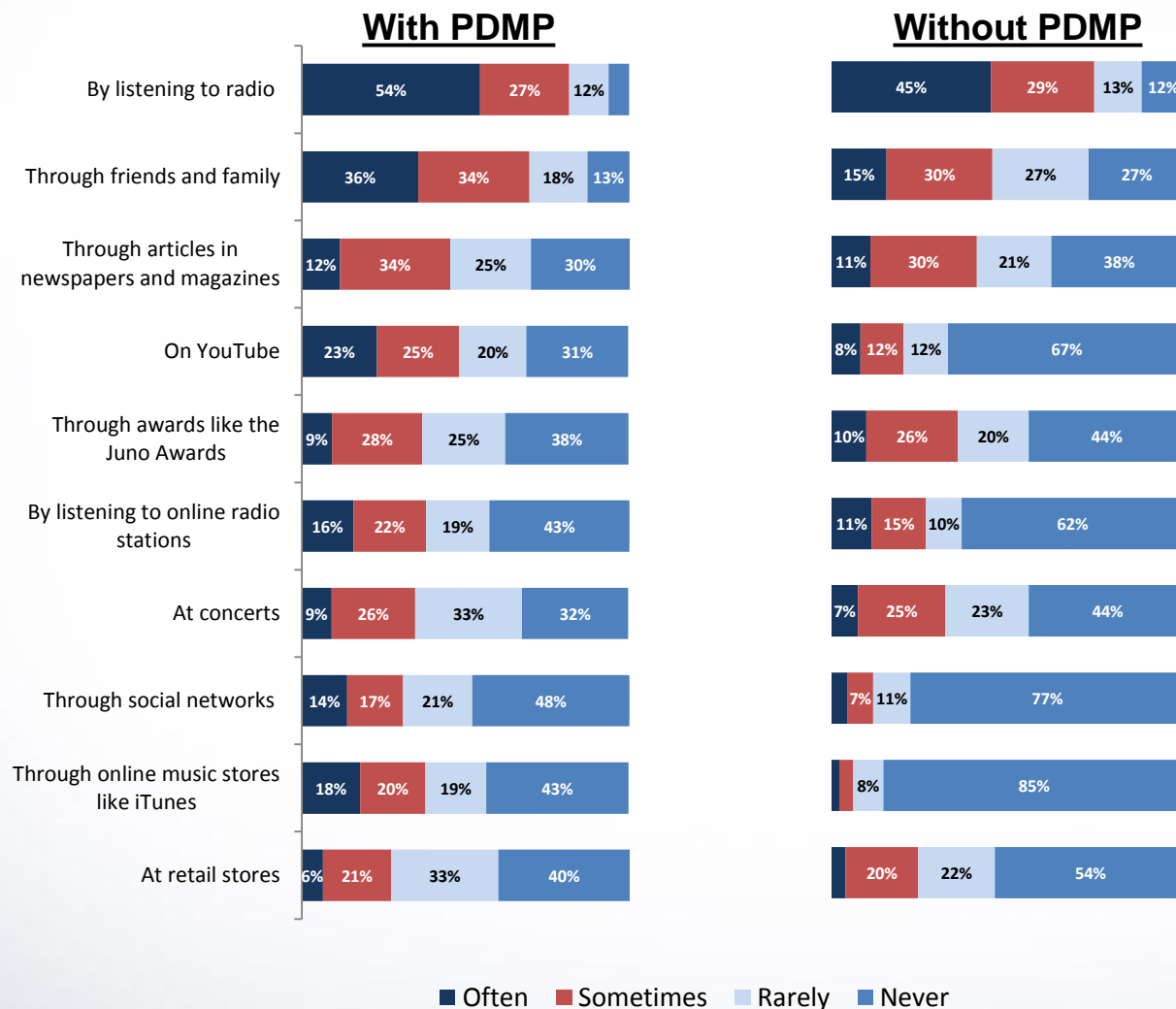
# How Canadians Discover New Music – By Language Spoken at Home



# How Canadians Discover New Music – by Smartphone Ownership



# How Canadians Discover New Music – by Portable Digital Music Player Ownership

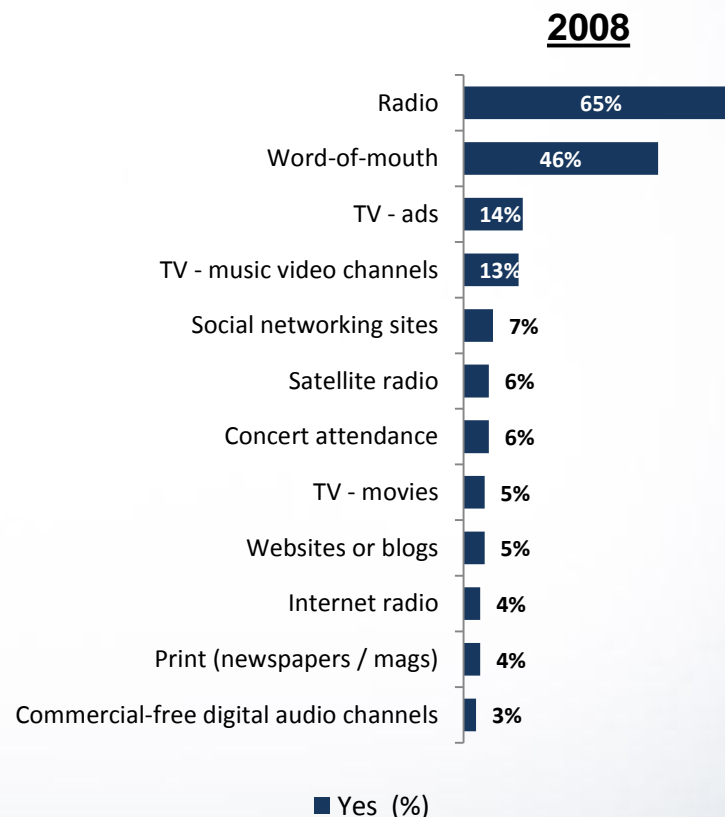
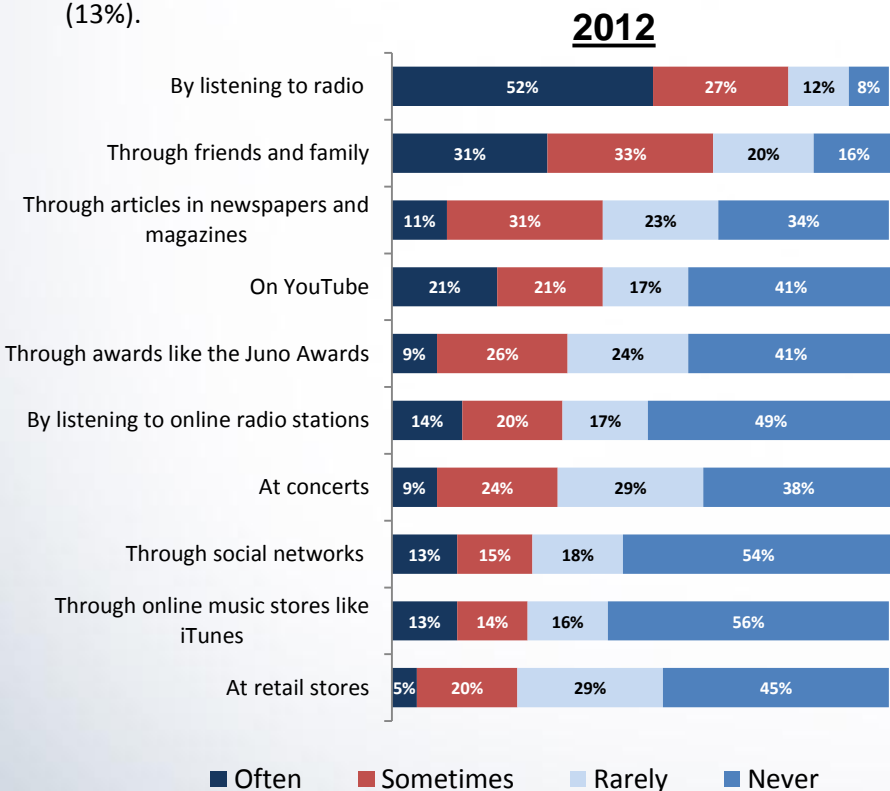


# How Canadians Discover New Music – Comparative Analysis



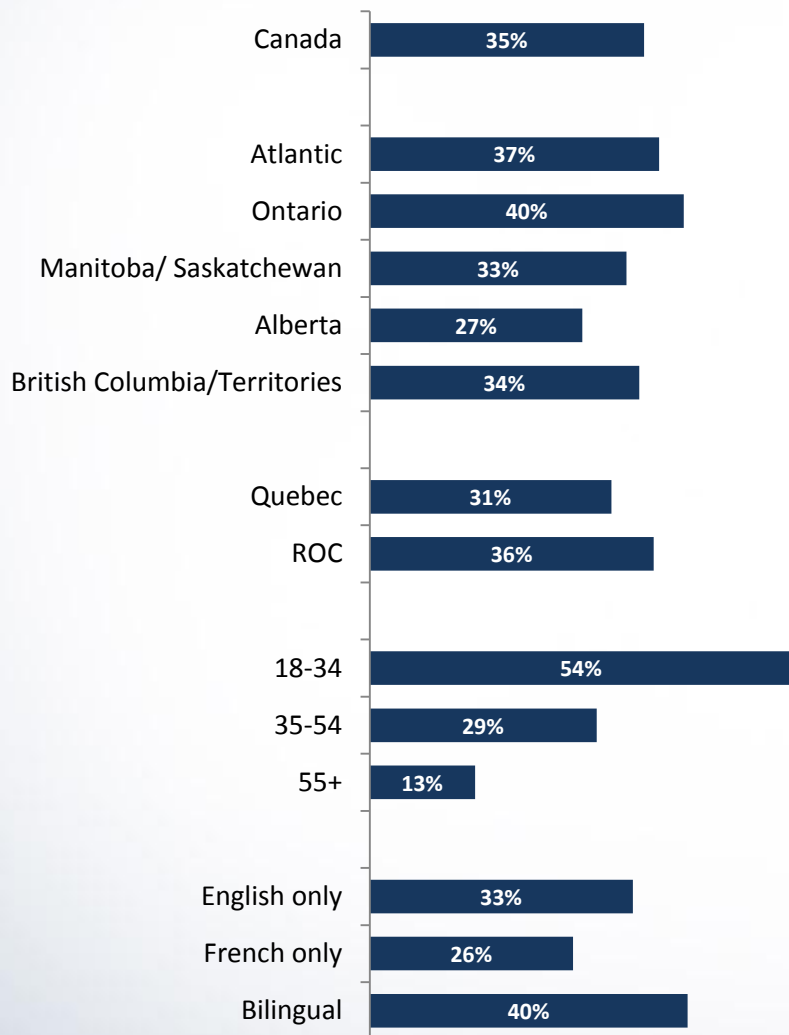
This comparative analysis involves different methodologies. The 2008 and 2012 data below is intended to illustrate a trend, but cannot be directly compared.

To understand how Canadians discover new music, a prompted, scale-based approach was used in 2012 whereas an unprompted, open-ended approach was used in 2005. While the results cannot be directly compared since prompted questions will almost always elicit higher results than unprompted ones, there are a few trends that can be highlighted. By focusing on how Canadians *often* discover music, we see that listening to the radio and word-of-mouth continue to be the two most popular sources. While only 10% mentioned “Internet” in 2008, a variety of web-based sources are used in 2012, including YouTube (21% use this often), online radio stations (14%), online music stores (13%), and social networks (13%).





# Recommending Music Via Social Media



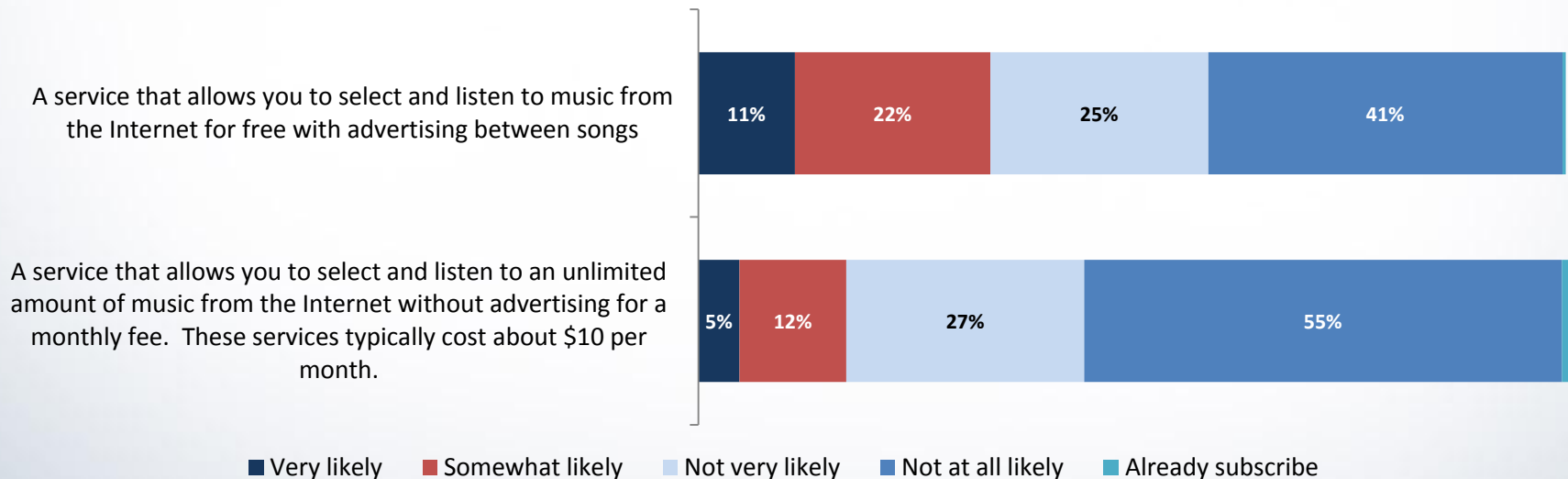
• Respondents who access a social media network at least once a month (i.e social media networkers), were asked whether they had used social media to recommend music to their friends or Twitter followers.

- Over one third of respondents (35%) say they have recommended music to friends via social media in the past three months.
- Residents of Ontario are more likely than those from Quebec or Alberta to have recommended music through social media.
- Respondents 18 to 34 years of age are the most likely to have recommended music via social media, compared to older respondents.
- Bilingual respondents are more likely to have recommended music via social media.
- Men, respondents with a household income under \$40K, and owners of a PDMP or a Smartphone are more likely to say they have recommended music via social media.

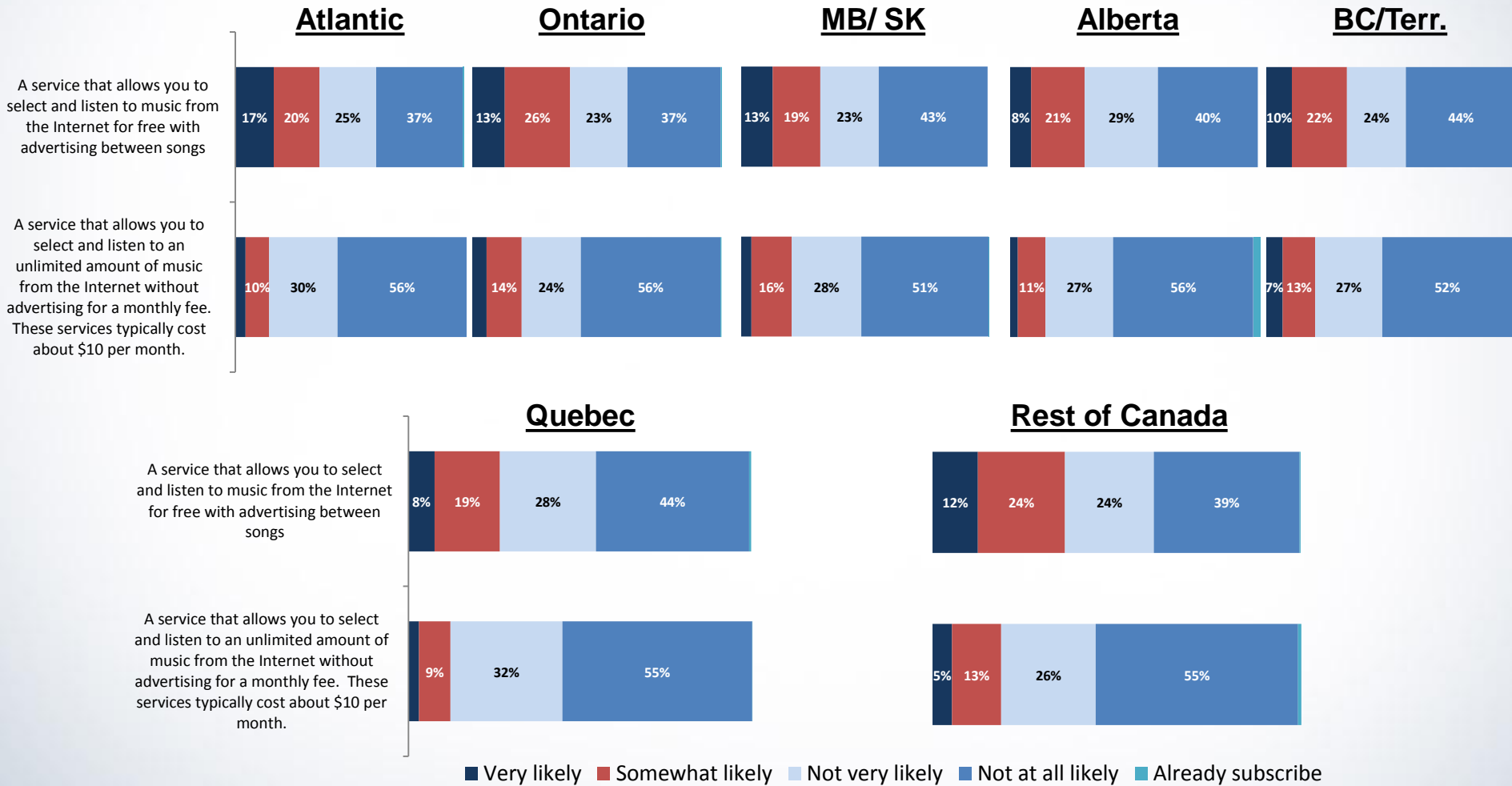
# Interest in Online Music Subscription Services



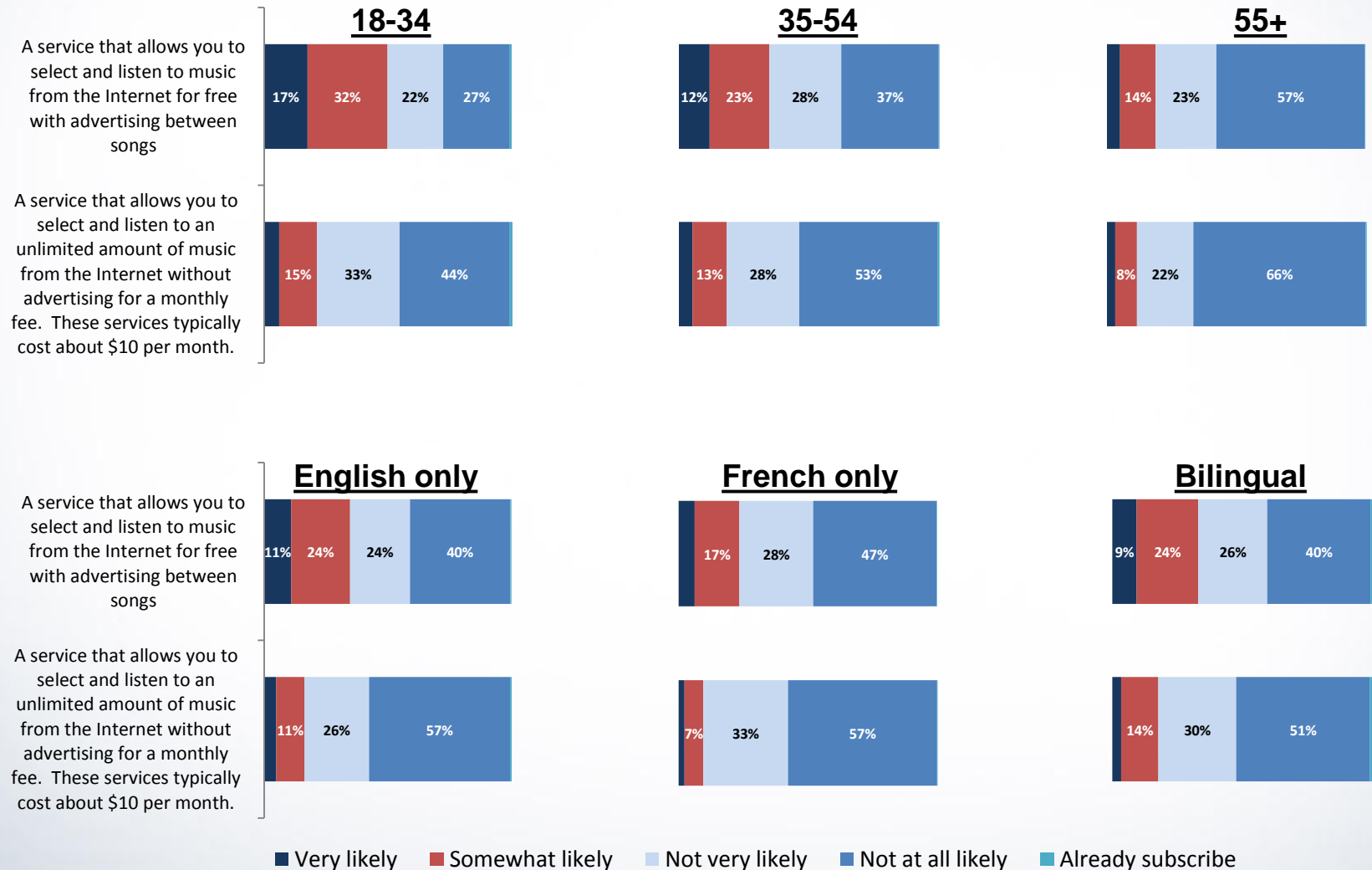
- Respondents were asked their likelihood to subscribe to two different online music services: one for free with advertising between songs, and one without advertising, with unlimited music, for a monthly fee.
- One third of respondents (33%) say they are “very” or “somewhat” likely to subscribe to the free online music service, while less than one fifth (17%) are likely to subscribe to the online unlimited music service for a monthly fee.
- Urban residents, social media networkers, 18 to 34 year olds, and those who speak only English at home, are more likely to subscribe to this service.
- Residents of Ontario, Manitoba/ Saskatchewan, and British Columbia/ Territories are most likely to say they would subscribe to the unlimited music service for a fee. In addition, social media networkers, those under 34 years of age, and respondents who speak only English at home, or are bilingual, are also more likely than their counterparts to subscribe to the unlimited music service for a fee.



# Interest in Online Music Subscription Services – by Region



# Interest in Online Music Subscription Services – by Age and Language Spoken at Home



■ Very likely  
 ■ Somewhat likely  
 ■ Not very likely  
 ■ Not at all likely  
 ■ Already subscribe

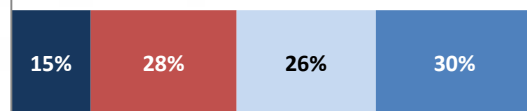
# Interest in Online Music Subscription Services – by Smartphone and PDMP Ownership



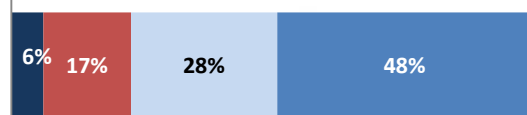
- Smartphone and PDMP owners are more likely than non-owners to say they would subscribe to either one of the online music services. Two fifths of smartphone owners (43%) would likely subscribe to the free online music service compared to only 25% among Canadians who do not own a smartphone. Similarly, 39% of PDMP owners would subscribe to this service, while only 15% of those without a PDMP are likely to subscribe.
- As for the online unlimited music service for a monthly fee, about one in five smartphone and PDMP owners (23% and 21% respectively) would subscribe compared to only 12% and 8% of non-owners.

## With Smartphone

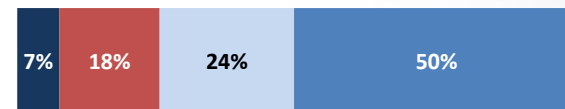
A service that allows you to select and listen to music from the Internet for free with advertising between songs



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.

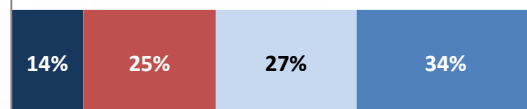


## Without Smartphone

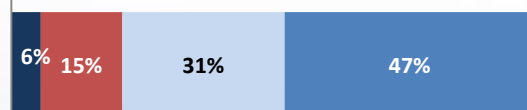


## With PDMP

A service that allows you to select and listen to music from the Internet for free with advertising between songs



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.



## Without PDMP

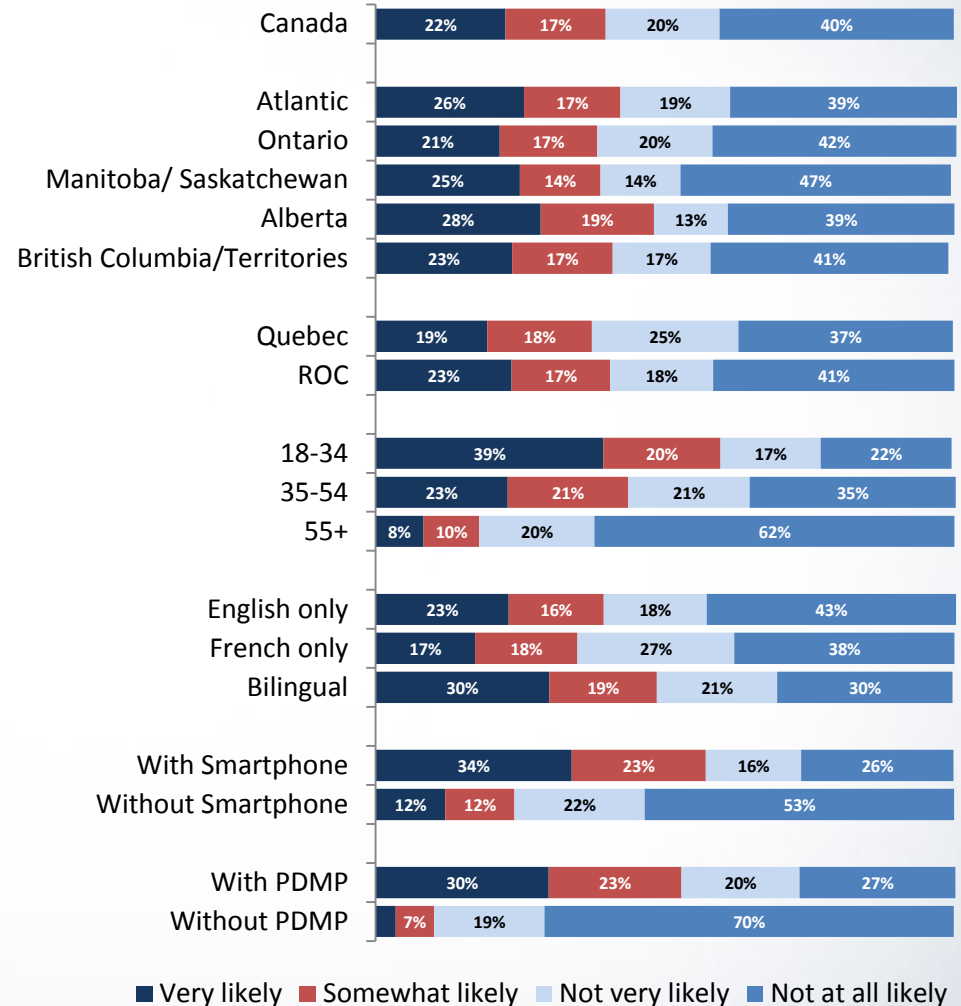


Very likely   Somewhat likely   Not very likely   Not at all likely   Already subscribe

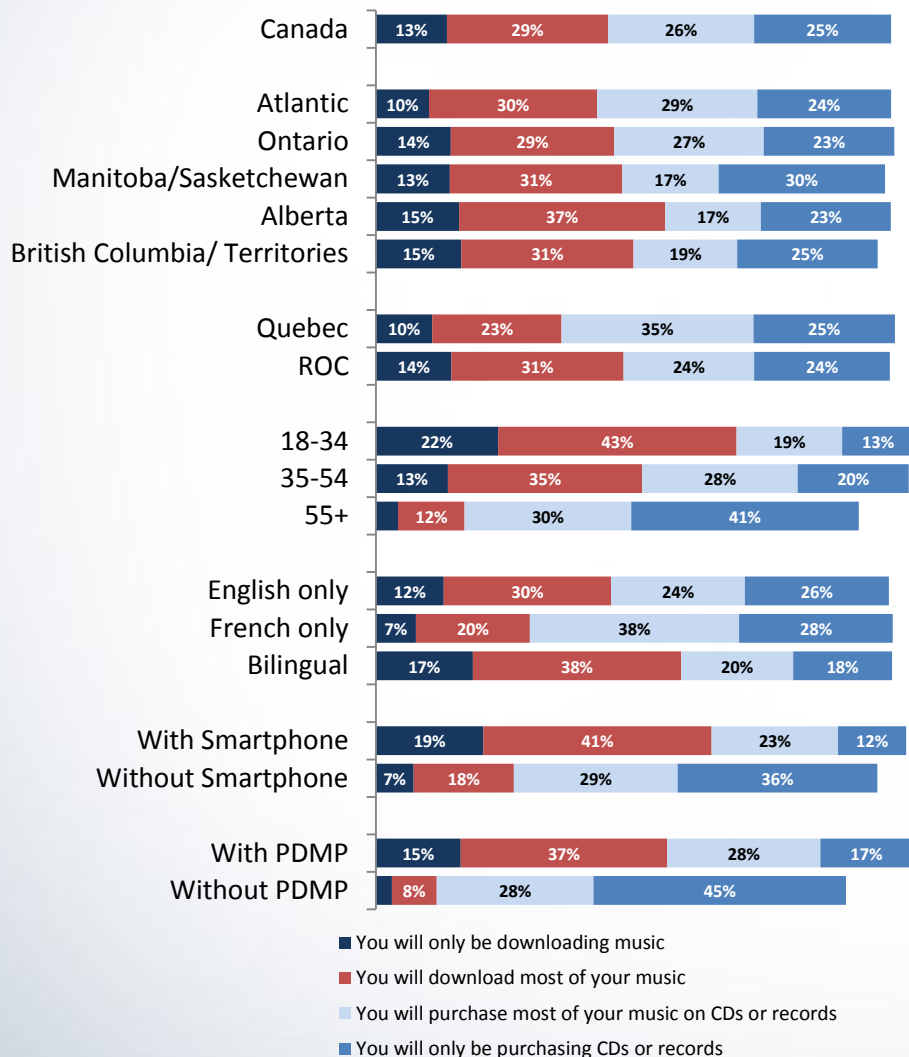
# Likelihood of Online Music Purchases



- Nearly 2 in 5 Canadians say they will likely purchase and download music from the Internet within the next 6 months.
- Albertans are most likely to say they will download music, especially compared to residents of Quebec and Ontario.
- The younger respondents are the more likely they are to say they will download music.
- Respondents with a smartphone are at least twice as likely than those without a smartphone to say they will download music within the next 6 months, and those with a PDMP are five times as likely than respondents without a PDMP to say they will download music within the next 6 months.
- Additionally, urban residents, those with a university education, with a household income over \$40K, social media networkers, and bilingual respondents are also more likely to say they will purchase and download music from the Internet in the near future, compared to their counterparts.



# Future Music Purchasing Behaviour



- 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 saying they will only be downloading music are more likely to have university education, live in an urban area, have a household income of at least \$80K, own technology devices (computer/Internet, Smartphone, e-book reader, PDMP, gaming console, or tablet) be a social media networker, and be bilingual.
- Respondents in provinces from Ontario to British Columbia are more likely than Quebecers to say they will download most of their music. Also urban residents, those with a university education, with a household income of at least \$40K, technology owners (computer/Internet, Smartphone, e-book reader, PDMP, gaming console, or tablet), social media networkers, and respondents who speak only English at home or are bilingual are more likely to say they will download most of their music.
- The younger respondents are, the more likely they are to say they will download most of their music, or they will be only downloading music.

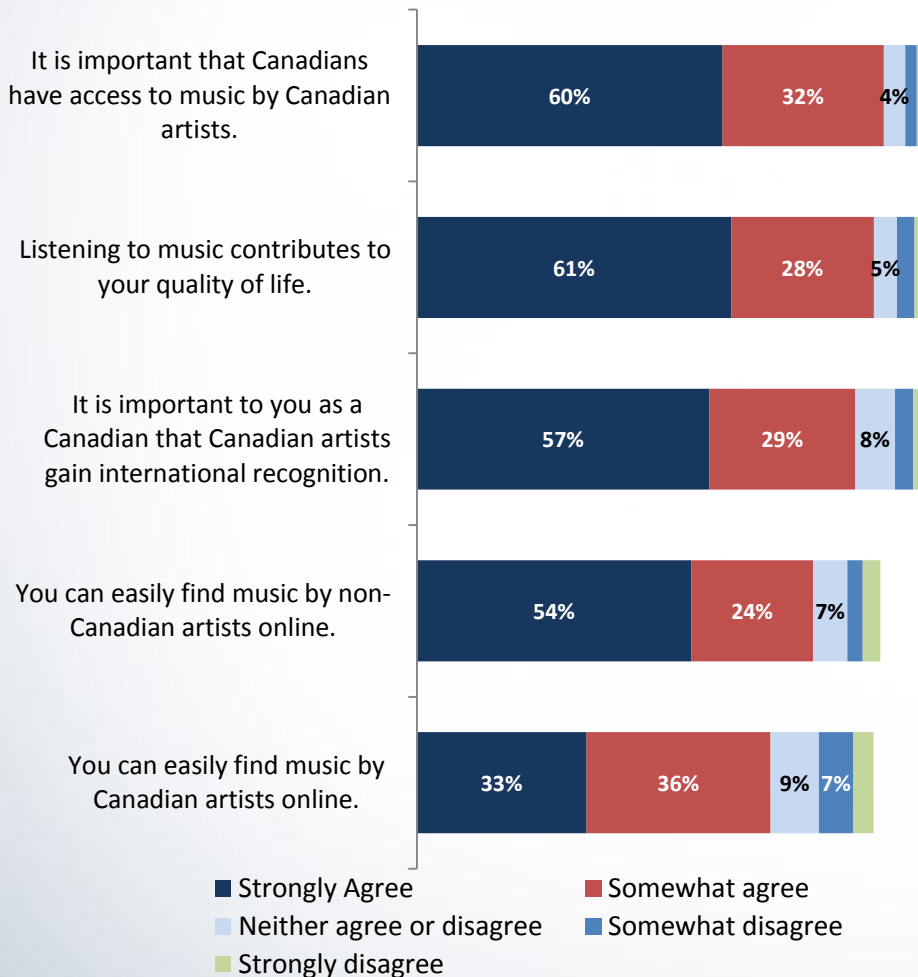
# Future Music Purchasing Behaviour



- Residents of Atlantic provinces, Quebec, and Ontario are more likely to say they will purchase most of their music on CDs or records. Respondents at least 35 years of age, and those who speak only French at home, are more likely to also say they will purchase most of their music on CD's or records.
- Those who will only be purchasing CDs or records are more likely to live in rural areas, have less education, lower household income, and not have technology available (computer, Internet, Smartphone, e-book reader, tablet, PDMP, or gaming console) or be a social media networker. The older respondents are, the more likely they are to select this option.
- Respondents with a Smartphone are more likely than those without a Smartphone to say they will download their music, either entirely or partially (60% vs. 25%). Similarly, respondents with a PDMP are more likely than those without a PDMP, to say they will download their music (52% vs. 11%).



# Canadian Music and Canadian Culture



- 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.
- Over 3 in 4 respondents (78%) agree they can easily find music by non-Canadian artists online, and 69% agree they can easily find music by Canadian artists online.

# Canadian Music and Canadian Culture



## Respondents who agree with these statements...

*It is important that Canadians have access to music by Canadian artists.*

*Listening to music contributes to my quality of life.*

*It is important to me as a Canadian that Canadian artists gain international recognition.*

*I can easily find music by non-Canadian artists online.*

*I can easily find music by Canadian artists online.*

## ...are more likely to be:

HH income under \$60K  
Speak only French at home

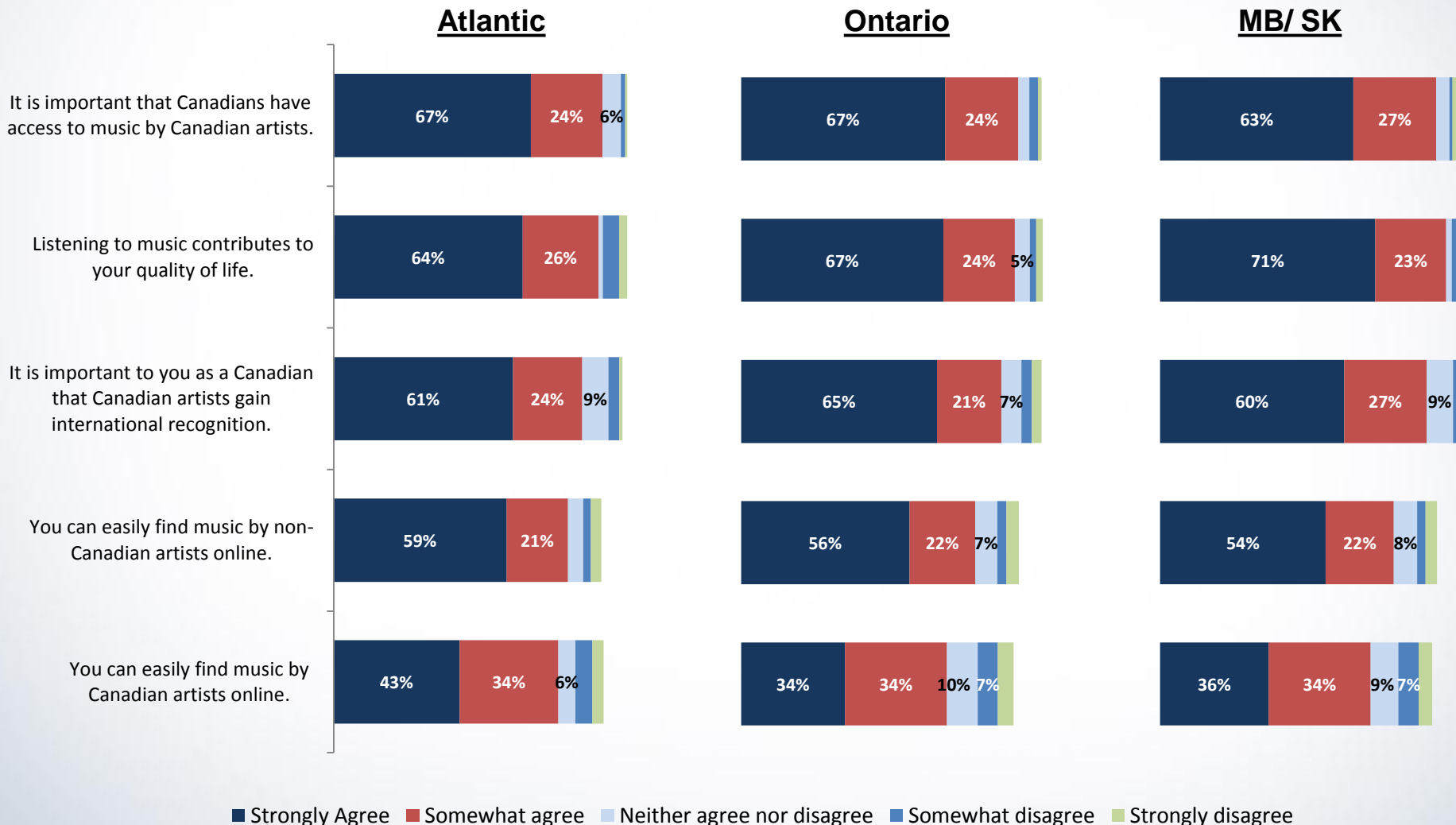
Social media networkers  
Speak only English at home or are bilingual

HH income under \$60K  
At least 55 years old

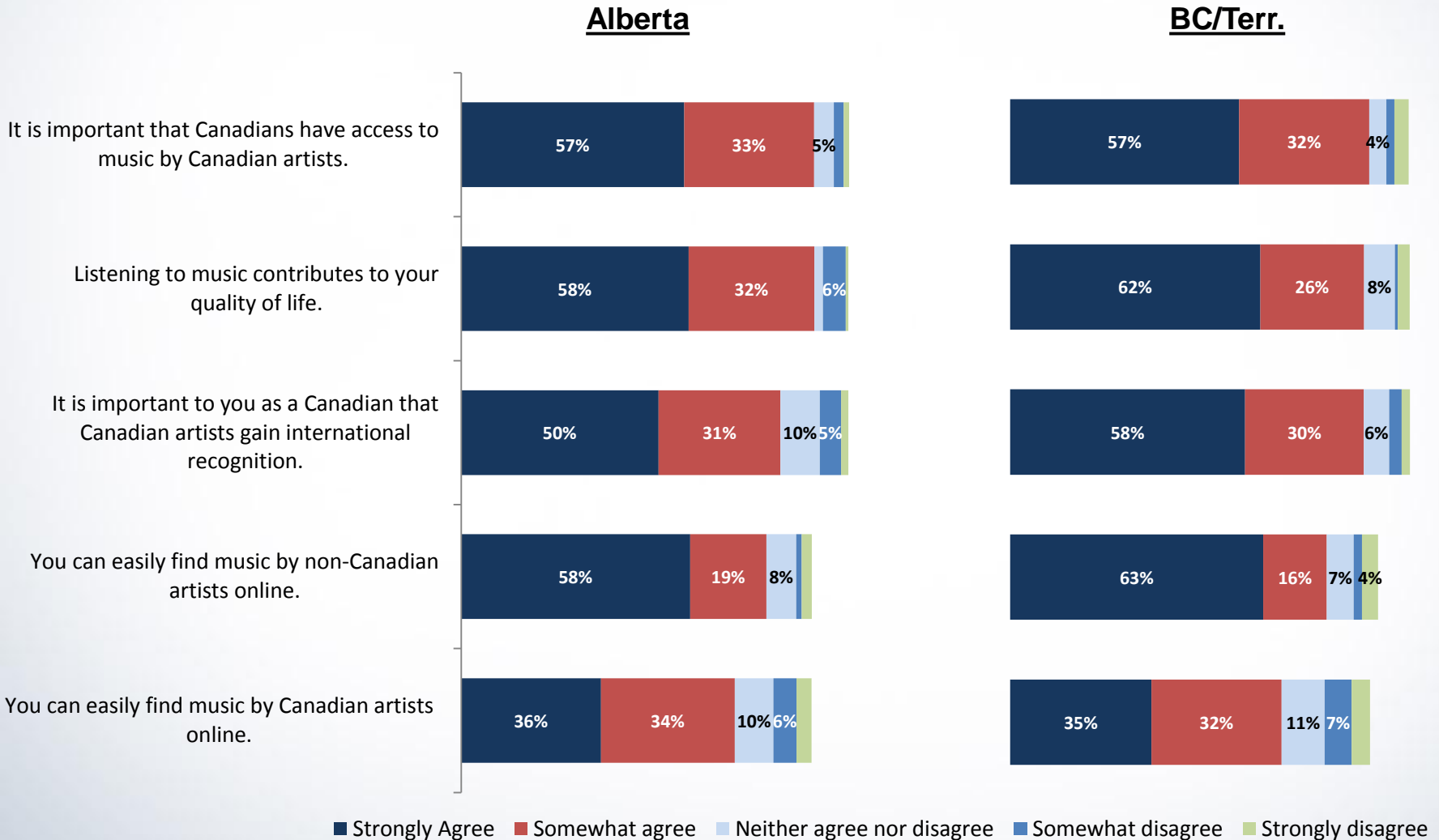
Men  
Urban residents  
At least a college / CEGEP education  
HH income at least \$60K  
Social media networkers  
Owners of tablets, e-readers, computers, are Internet-connected, smartphones and PDMP's

Urban residents  
Younger Canadians  
HH income at least \$60K  
Bilingual  
Social media networkers  
Owners of tablets, e-readers, computers, are Internet-connected, smartphones and PDMP's

# Canadian Music and Canadian Culture – by Region

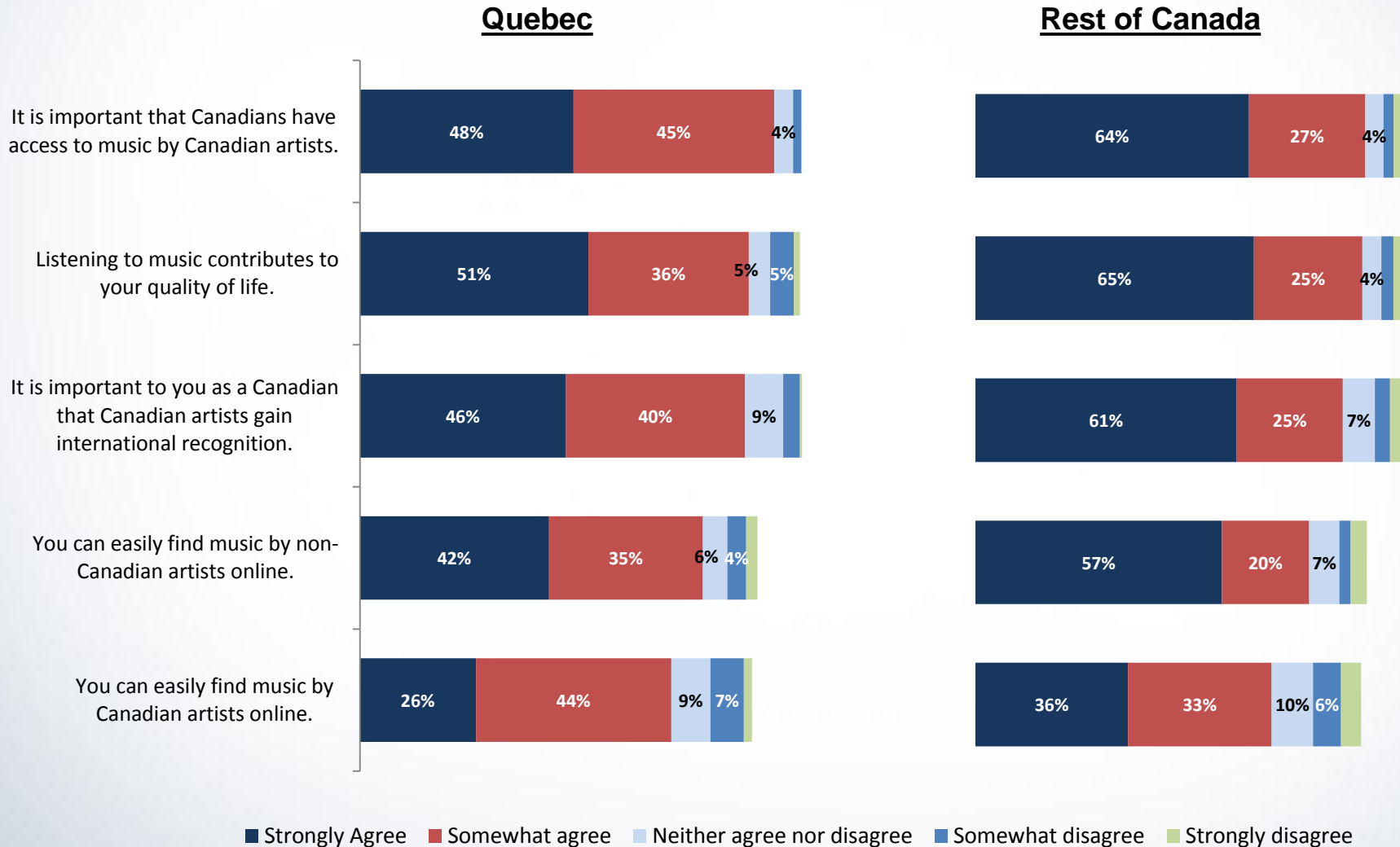


# Canadian Music and Canadian Culture – by Region

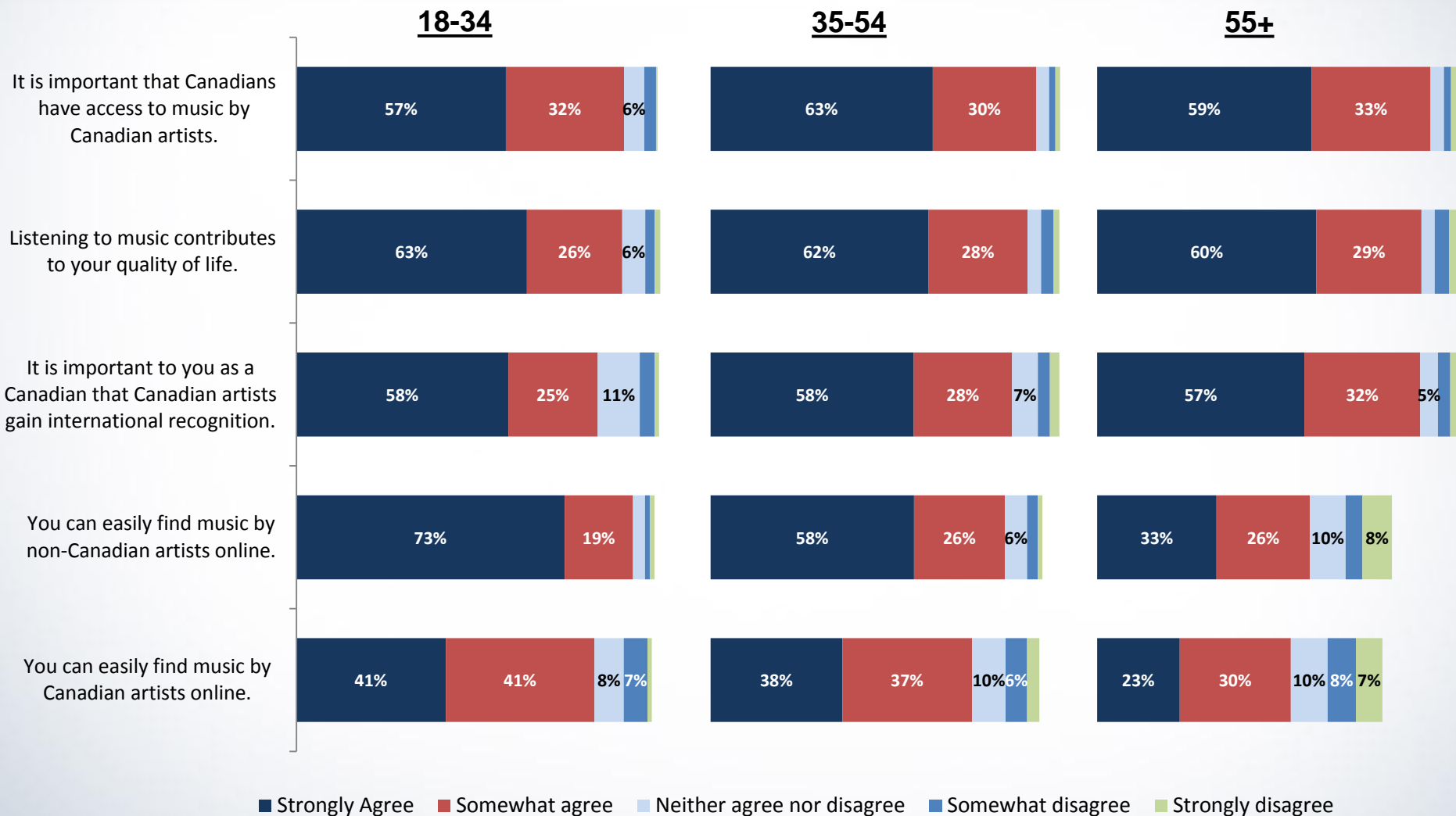


■ Strongly Agree 
 ■ Somewhat agree 
 ■ Neither agree nor disagree 
 ■ Somewhat disagree 
 ■ Strongly disagree

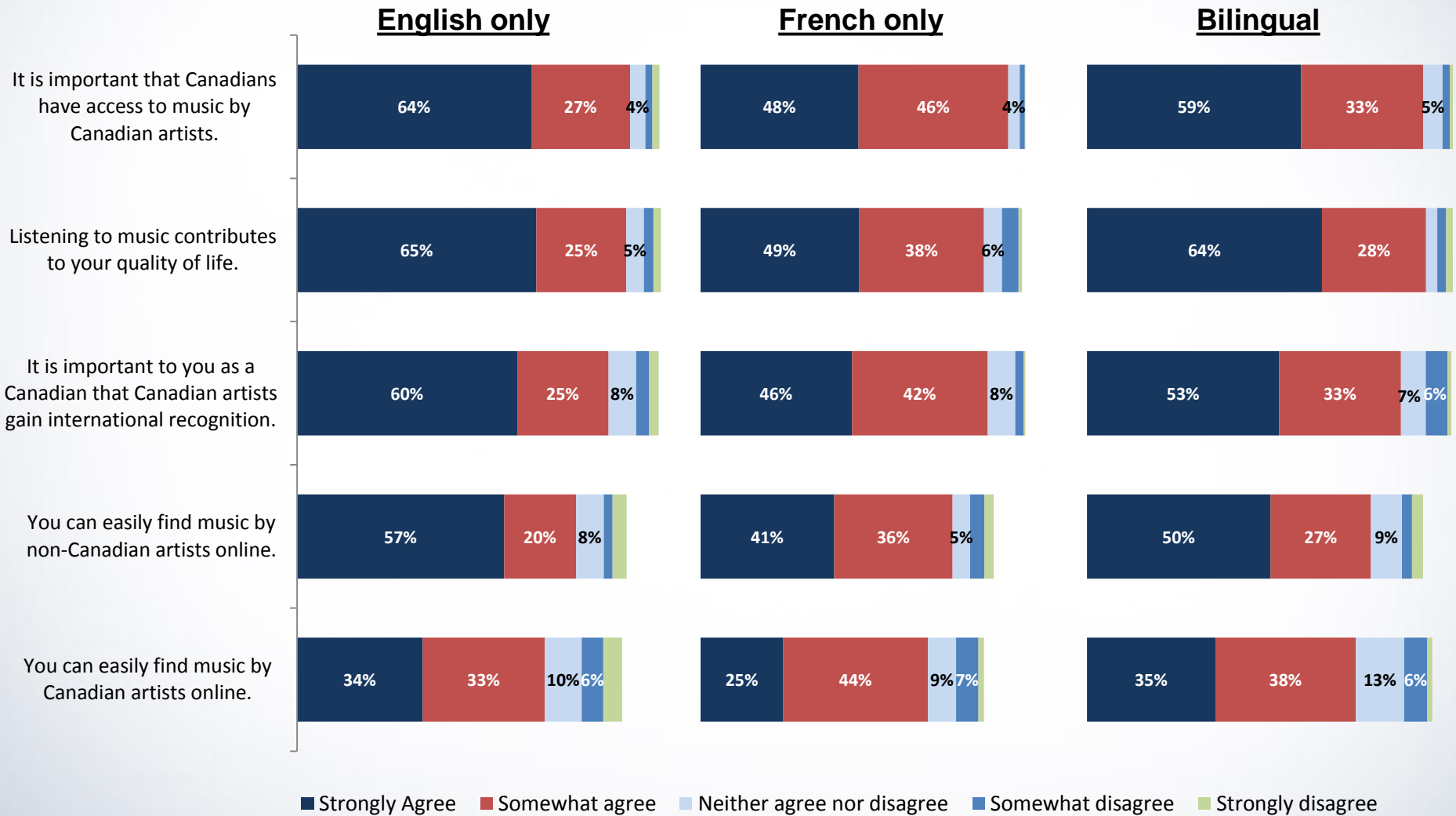
# Canadian Music and Canadian Culture – by Region



# Canadian Music and Canadian Culture – by Age



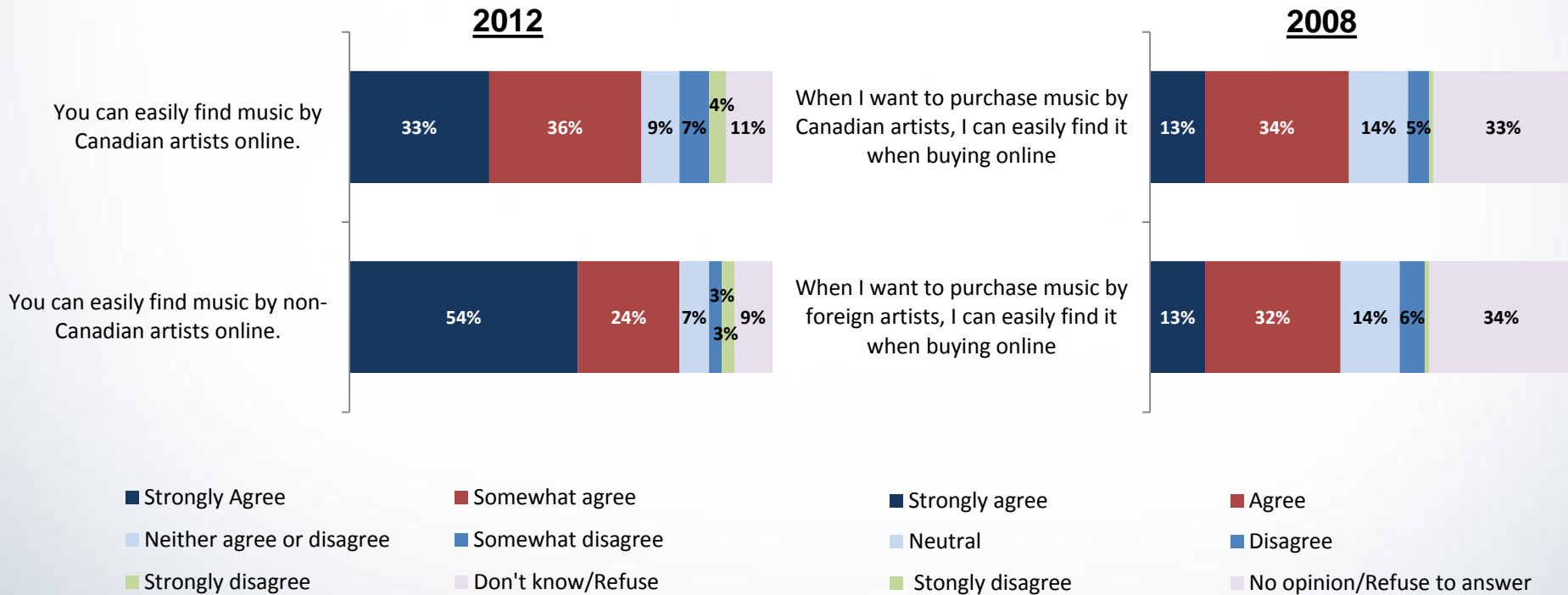
# Canadian Music and Canadian Culture – by Language Spoken at Home



# Canadian Music and Canadian Culture - Comparative Analysis



While Canadians did not seem to feel non-Canadian artists were any harder or easier to find online in 2008 compared to Canadian artists, respondents in 2012 are clearly feeling that non-Canadian artists are in fact easier to find online.



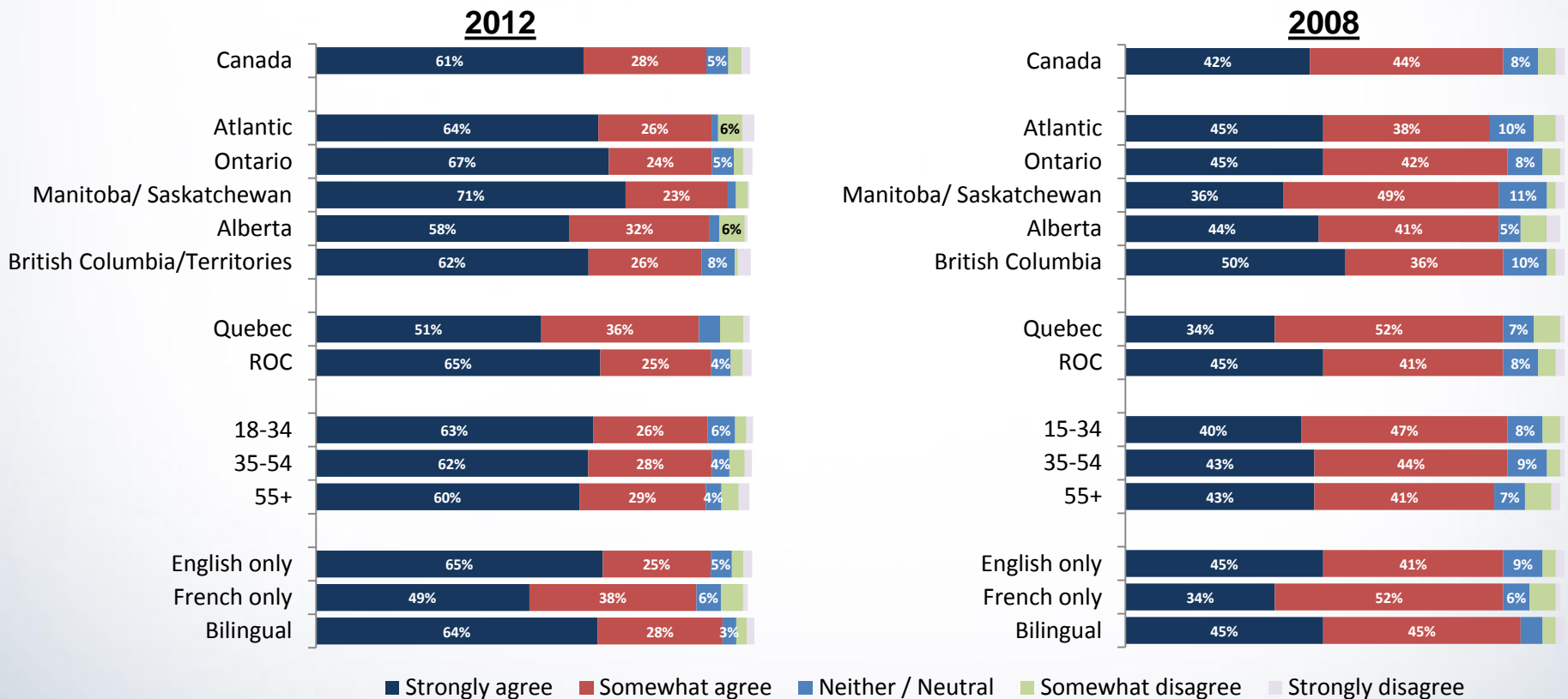


# Canadian Music and Canadian Culture - Comparative Analysis



Canadians continue to believe that listening to music contributes to their quality of life. What is noteworthy about the 2012 findings is that Canadians now feel more strongly about this sentiment than they did in 2008, as seen by the percent who *strongly agree* with the statement. This shift in sentiment is equally seen across the key regional and demographic segments.

*“Listening to music contributes to your quality of life.”*

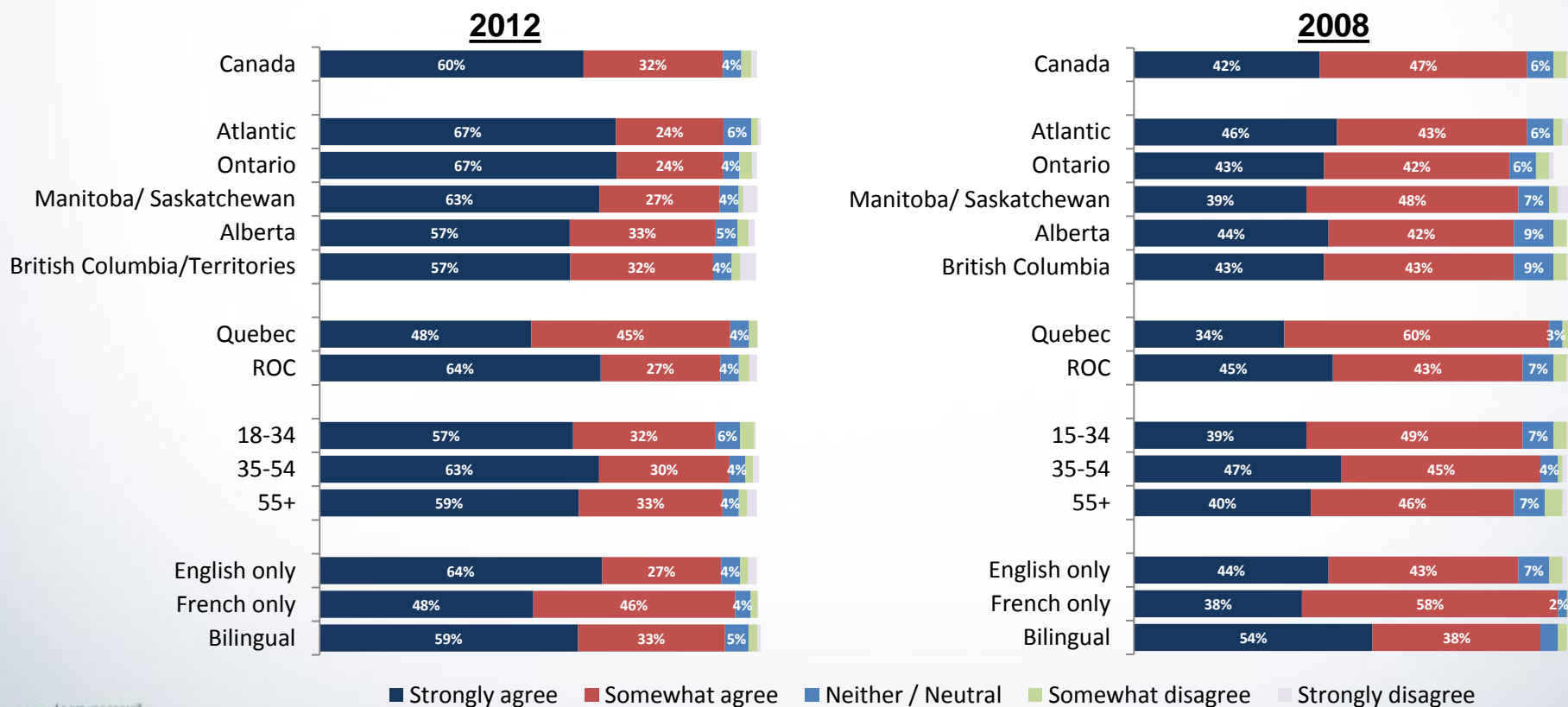


# Canadian Music and Canadian Culture - Comparative Analysis



Canadians also continue to believe that it is important that Canadians have access to music by Canadian artists. What is noteworthy about the 2012 findings is that Canadians now feel more strongly about this sentiment than they did in 2008, as seen by the percent who *strongly agree* with the statement. This increased sense of importance is equally seen across the key regional and demographic segments. One noteworthy difference between 2012 and 2008 is that Alberta and BC/Territory respondents in 2012 are somewhat less passionate about this issue compared to respondents in most other regions, which was not a trend observed in 2008.

*“It is important that Canadians have access to music by Canadian artists.”*



# Conclusions



Canadian  
Heritage

Patrimoine  
canadien

# Conclusions

## **Canadians Believe Access to Canadian Cultural Products is Important**

One of the cross-cutting themes throughout this report is that Canadians feel it is important that they have access to Canadian books, magazines, music and film. Two important trends are worth noting – not only are Canadians seemingly more passionate about this compared to previous waves of research but this passion is equally strong from coast to coast and across genders and generations.

## **Accessibility of Canadian Cultural Products is High, with Some Exceptions**

Another consistent finding throughout this research is that Canadians, by and large, seem to feel they can easily find Canadian cultural products. When 2012 results are compared to previous studies, accessibility to Canadian books and music seems to be on the rise.

However, a few gaps exist. In particular, Canadians do not seem to feel they can find Canadian feature films as easily as they can find other kinds of Canadian cultural products – this might in large part explain why only 36% of Canadians agree that Canadian movies are well promoted and advertised. This sentiment might also explain why approximately two-thirds of Canadians agree that Canadian broadcasters should show more Canadian movies on television and that movie theatres should show more Canadian movies.

Despite high rates of accessibility for Canadian music and books, Canadians report that they can somewhat more readily find content from non-Canadian artists and authors than content from Canadian ones, by a margin of roughly 10 percent, which is not surprising given Canada's open market to foreign products.

# Conclusions

## **Canadian Cultural Products Reflect Canadian Experiences and Perspectives**

The results from this survey also suggest that Canadians would agree that our cultural products in large part reflect our collective experiences and perspectives, as diverse as these may be. More specifically, Canadians agree that Canadian magazines reflect their experiences and perspectives, that Canadian nonfiction books help them learn about subjects that are relevant to Canadian life and that fiction books help them appreciate stories told from a Canadian perspective. As well, more tend to agree than disagree that they can relate to the stories in Canadian films.

## **Discovery is Achieved in a Variety of Ways**

When it comes to discovering new music or new books, Canadians resort to a variety of different sources. Besides word-of-mouth, which is consistently mentioned, a range of print-based, web-based and bricks-and-mortar channels are used, accommodating the various preferences and limitations that Canadians have when they decide to broaden their cultural horizons. When it comes to discovering books specifically, the results show that traditional channels continue to dominate the discovery experience despite the growing popularity of digital platforms.

# Conclusions

## **Technology Has, and Will Continue to Have, an Impact on Cultural Products**

This study is rich in examples of how Canadians use different technologies to seek out, consume and share cultural products. The time series data in this report also demonstrates how quickly the technological landscape can change. Among many examples, the research shows that websites are increasingly used for discovering and buying cultural products. The manner in which Canadians consume feature film has been completely transformed. Social media networks are popular in Canada and they are used by many to recommend films and music. The ongoing evolution and adoption of mobile technologies, such as smartphones, tablets and e-readers, continue to change the way Canadians find and consume cultural products.

## **Adoption of Technologies and Related Behaviours Is Lower in Quebec**

Historically, Quebecers have lagged behind other provinces regarding the adoption of various technologies. While they are now at par regarding overall access to computers and the Internet, there continues to be important gaps in adoption on a number of other technological fronts. Our study reveals that Quebecers are significantly less likely to own gaming consoles, tablets, e-readers and smartphones, which in large part explains why they are also less likely to read e-books, download or stream films, and watch films on handheld devices. This might well be linked to a lower availability of French-language product. They are less engaged in social media than other Canadians, including using that medium to recommend music and film. Their future music purchasing intentions suggests a lower level of interest in online music subscription services and a lower likelihood to purchase music online in general.

# Appendix A – Questionnaires



Canadian  
Heritage

Patrimoine  
canadien



## 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	<b>CONTINUE WITH SURVEY</b>
No – no time now	2	<b>SCHEDULE CALLBACK</b>
No – not interested	3	<b>ATTEMPT CONVERSION, OTHERWISE TERMINATE</b>

- 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	<b>GO TO MAIN SURVEY</b>
Gets the person	2	<b>REPEAT A1 THEN GO TO MAIN SURVEY</b>
Refusal	3	<b>ATTEMPT CONVERSION, OTHERWISE TERMINATE</b>



## 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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	5
Don't know/Refuse ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	5
Don't know/Refuse ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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. **[AKS 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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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**

- a) Reading Canadian magazines helps you appreciate Canadian culture and learn more about Canada.
- b) Canadian magazines reflect your experiences and perspectives.
- c) Non-Canadian magazines reflect your experiences and perspectives.
- d) It is important that Canadians have access to Canadian magazines.
- e) 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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> ) | 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**

- a) Get them through the Amazon website?
- b) How about through Kobo?
- c) How about through the Apple iBookstore?
- d) How about through libraries?
- e) How often do you download them for free?
- f) 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**

- a) It is important that Canadians have access to Canadian books.
- b) You can easily find books written by Canadian authors.
- c) 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.
- d) Reading Canadian nonfiction books helps you learn about subjects that are relevant to Canadian life.
- e) 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
<b>[SHOW FOR b-e] I don't read those kinds of books (DO NOT READ)</b>	6
Don't know/Refuse ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	5
Don’t know/Refuse ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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...

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

- a) Laurence Anyways
- b) Resident Evil: Afterlife
- c) Incendies (AIN-SAN-DEE)
- d) Monsieur Lazhar
- e) A Dangerous Method
- f) Goon
- g) Barney’s Version
- h) 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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	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 ( <b>DO NOT READ</b> )	9

## A. Introduction/sélection préliminaire

- A1. Bonsoir/bonjour. Je m'appelle \_\_\_\_\_ et je téléphone du groupe conseil Quorus au nom du gouvernement du Canada. Nous menons un sondage sur les habitudes des Canadiens en matière de cinéma, de musique, de livres et de périodiques. Le sondage dure entre 15 et 20 minutes, et votre participation est volontaire et anonyme. Toutes vos réponses demeureront confidentielles. Auriez-vous le temps de nous aider ce soir/cet après-midi?

**AU BESOIN :** Le sondage est conforme à la *Loi sur la protection des renseignements personnels* et est inscrit dans le Système national d'enregistrement des sondages.

Oui	1	<b>CONTINUEZ.</b>
Non – pas le temps maintenant	2	<b>PLANIFIEZ UN RAPPEL.</b>
Non – pas intéressé	3	<b>TENTEZ DE CONVAINCRE, AUTREMENT CONCLUEZ.</b>

- A2. Préférez-vous continuer en anglais ou en français?

Anglais	1
Français	2

- A3. Pour assurer la participation aléatoire de tous les Canadiens, puis-je parler à [**ALÉATOIRE : l'adulte le plus jeune / le deuxième adulte le plus jeune / l'adulte le plus âgé / le deuxième adulte le plus âgé**] chez vous?

À l'appareil	1	<b>CONTINUEZ.</b>
On vous transfère	2	<b>RÉPÉTEZ A1, PUIS CONTINUEZ.</b>
Refuse	3	<b>TENTEZ DE CONVAINCRE, AUTREMENT CONCLUEZ.</b>

## B. Questions d'ordre général sur les technologies

B1. Tout d'abord, j'aimerais vous poser quelques questions de nature générale sur les technologies. Possédez-vous ou avez-vous accès aux technologies suivantes, que ce soit à la maison, au travail ou ailleurs?

- a) Un ordinateur, soit un PC ou un ordinateur portable
- b) Un téléphone intelligent (**AU BESOIN** : comme un BlackBerry, un iPhone ou un Android).
- c) Un lecteur portable de livres électroniques (**AU BESOIN** : comme un lecteur Sony Reader, un Kindle, ou un Kobo)
- d) Une connexion Internet
- e) Un lecteur numérique portable ou un lecteur MP3 portable (**AU BESOIN** : comme un iPod)
- f) Une console de jeux
- g) Une tablette, mise à part un lecteur de livres électronique (**AU BESOIN** : comme un Samsung Galaxy, un Playbook ou un iPad)

Oui 1  
Non 2  
Ne sait pas/Refuse de répondre (**NE LISEZ PAS.**) 9

B2. Utilisez-vous un réseau de média social au moins une fois par mois? Il pourrait s'agir de Facebook, Twitter, Google+ (GOOGLE PLUS) ou autre.

Oui 1  
Non 2  
Ne sait pas/Refuse de répondre (**NE LISEZ PAS.**) 9

**INSTRUCTIONS DU PROGRAMMEUR POUR LA RANDOMISATION DE LA SECTION : Présentez les blocs de questions qui suivent de manière aléatoire.**

- Questions sur les périodiques : C1-C13
- Questions sur les livres : D1-D8
- Questions sur la musique : E1-E6
- Questions sur le cinéma et les vidéos : F1-F4

## C. Périodiques

### Préférences

- C1. J'aimerais maintenant discuter des magazines imprimés que vous lisez ou que vous feuillotez **par plaisir**, ce qui exclut les catalogues et les magazines que vous lisez ou que vous feuillotez pour le travail ou l'école.

Peu importe comment vous avez obtenu les magazines, l'endroit où vous les avez lus, que vous les ayez reçus gratuitement ou que vous les ayez achetés. Veuillez inclure tous les magazines, peu importe si vous n'avez lu que quelques articles ou que vous les avez simplement feuilletés rapidement.

Rappelez-vous que pour l'instant nous parlons seulement des magazines imprimés.

- C2. De tous les magazines imprimés que vous lisez par plaisir dans un mois normal, quelle est la proportion de magazines canadiens comparativement aux magazines non canadiens? Diriez-vous qu'ils sont...? **LISEZ LA LISTE.**

**AU BESOIN :** Les magazines non canadiens sont ceux qui proviennent de l'extérieur du Canada, y compris des États-Unis, de l'Europe et ainsi de suite.

tous canadiens	1
en majorité canadiens	2
tant canadiens que non canadiens	3
en majorité non-canadiens	4
tous non canadiens	5
Vous ne lisez pas les magazines imprimés	6
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

- C3. **[DEMANDEZ SI C2= « Ne lit pas les magazines imprimés »]** Quelle est la principale raison pour laquelle vous ne lisez PAS de magazines imprimés? **NOTE À L'INTERVIEWEUR :** Évitez les réponses de nature générale comme « je ne lis pas les magazines ». Sondez pour comprendre les raisons pour lesquelles le répondant ne lit aucun magazine. **NE LISEZ PAS LA LISTE. ACCEPTEZ SEULEMENT UNE RÉPONSE.**

Je n'aime pas ce qui est offert. Aucun magazine ne m'intéresse.	1
Les magazines imprimés sont trop chers.	2
Je manque de temps. Je suis trop occupé.	3
Je préfère les livres.	4
Je préfère les magazines numériques.	5
Je m'informe autrement.	6
Les magazines sont désuets.	7
Autre – veuillez préciser	77
Ne sait pas/Refuse de répondre	99



**SI C2= « Vous ne lisez pas les magazines imprimés », PASSEZ À C7.**

C4. À quelle fréquence arrivez-vous facilement à dire la différence entre un magazine imprimé canadien et un magazine imprimé non canadien? Diriez-vous que vous y arrivez... **LISEZ L'ÉCHELLE.**

**AU BESOIN:** Non canadien signifie de l'extérieur du Canada, comme des États-Unis, de l'Europe et ainsi de suite.

Souvent	1
Quelquefois	2
Rarement	3
Jamais	4
Ne lis pas les magazines imprimés ( <b>NE LISEZ PAS.</b> )	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

C5. **[SAUTEZ SI C2= « tous non canadiens ».]** De façon générale, quand vous lisez un magazine imprimé, pourquoi choisissez-vous un magazine canadien plutôt qu'un magazine non canadien? **NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES PERTINENTES.**

Les articles sont plus pertinents pour moi.	1
Le sujet m'intéresse.	2
La publicité est plus pertinente pour moi.	3
Il est moins cher.	4
Je ne m'intéresse pas au contenu ni aux reportages non canadiens.	5
Je ne choisis pas consciemment entre les magazines canadiens et les magazines non canadiens.	6
Autre – veuillez préciser	77
Ne sait pas/Refuse de répondre	99

### Disponibilité

C6. À quelle fréquence trouvez-vous des magazines canadiens qui abordent des sujets qui vous intéressent? Diriez-vous... **LISEZ LA LISTE.**

Souvent	1
Quelquefois	2
Rarement	3
Jamais	4
Ne lis pas les magazines imprimés ( <b>NE LISEZ PAS.</b> )	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

## Magazines électroniques

C7. J'aimerais maintenant discuter des magazines électroniques que vous pouvez lire avec un lecteur numérique, un téléphone intelligent, un ordinateur ou une tablette comme un iPad. Je ne parle pas du contenu général qu'on retrouve sur les sites web des magazines, mais de la version électronique d'un magazine qu'on retrouve dans les kiosques à journaux.

C8. À quelle fréquence lisez-vous les magazines électroniques? Diriez-vous...? **LISEZ LA LISTE.**

Souvent	1
Quelquefois	2
Rarement	3
Jamais	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

C9. **[DEMANDEZ SI C8= « quelquefois », « rarement » ou « jamais ».]** Quelle est la principale raison pour laquelle vous ne lisez pas **[INSÉREZ SI C8 = 2 ou 3 : plus]** de magazines électroniques? **NOTE À L'INTERVIEWEUR :** Évitez les réponses de nature générale comme « je ne lis pas les magazines ». Sondez pour comprendre les raisons pour lesquelles le répondant ne lit aucun magazine. **NE LISEZ PAS LA LISTE. ACCEPTEZ SEULEMENT UNE RÉPONSE.**

Je ne lis aucun magazine sous quelque forme que ce soit.	1
Je préfère l'expérience que me procure la lecture d'un magazine imprimé.	2
Je n'ai trouvé aucun magazine électronique sur un sujet qui m'intéresse.	3
Pour moi, les magazines imprimés sont plus faciles à lire et à feuilleter.	4
Les magazines électroniques me fatiguent les yeux.	5
Les magazines électroniques sont chers.	6
Je n'ai pas de lecteur numérique ni de tablette.	7
Je ne sais pas comment m'en procurer.	8
Le magazine que je lis n'est pas offert en version électronique.	9
Autre – veuillez préciser	77
Ne sait pas/Refuse de répondre	99

C10. **[DEMANDEZ SI C8 = « jamais ».]** Dans quelle mesure est-ce probable que vous commencerez à lire des magazines électroniques au cours des six prochains mois? Diriez-vous...? **LISEZ LA LISTE.**

Très probable	1
Probable	2
Peu probable	3
Pas du tout probable	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

**SI C8 = « jamais », PASSEZ À C13.**

C11. Dans les six prochains mois, croyez-vous... **LISEZ LA LISTE.**

que vous lirez des magazines électroniques beaucoup plus souvent que vous le faites maintenant	1
un peu plus souvent que maintenant	2
un peu moins souvent que maintenant	3
beaucoup moins souvent que maintenant ou autant que maintenant?	4
	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

C12. De tous les magazines électroniques que vous lisez, quelle est la proportion de magazines canadiens comparativement aux magazines non canadiens? Diriez-vous qu'ils sont...? **LISEZ LA LISTE.**

tous canadiens	1
en majorité canadiens	2
tant canadiens que non canadiens	3
en majorité non canadiens	4
tous non canadiens	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

### Qualité/réaction émotive

C13. Veuillez indiquer dans quelle mesure vous êtes en accord ou non avec chacun des énoncés suivants au sujet des magazines imprimés et des magazines électroniques. Donc êtes-vous fortement en accord, en accord, ni en accord, ni en désaccord, en désaccord ou fortement en désaccord que... : **PRÉSENTEZ LES CHOIX DE FAÇON ALÉATOIRE.**

- Lire des magazines canadiens m'aide à apprécier la culture canadienne et à en apprendre davantage sur le Canada.
- Les magazines canadiens sont le reflet de vos expériences et de vos points de vue.
- Les magazines non canadiens sont le reflet de vos expériences et de vos points de vue.
- Il est important que les Canadiens aient accès à des magazines canadiens.
- Vous comptez sur votre journal communautaire pour vous informer sur votre collectivité.

Diriez-vous que vous êtes...? **RÉPÉTEZ AU BESOIN.**

fortement en accord	1
en accord	2
ni en accord, ni en désaccord	3
en désaccord	4
fortement en désaccord	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

## D. Livres

- D1. J'aimerais maintenant discuter des livres que vous lisez **par plaisir**, ce qui exclut les livres que vous lisez pour le travail ou l'école. Veuillez inclure toutes les sortes de livres, incluant les livres audio et les livres électroniques...
- peu importe comment vous avez obtenu les livres : que vous les ayez achetés, qu'on vous les ait donnés ou que vous les ayez empruntés à la bibliothèque ou à un ami
  - peu importe dans quelle langue ils ont été écrits, et,
  - peu importe que vous les ayez lus au complet ou à peine commencés.

### Découverte

- D2. Je vais vous énumérer plusieurs façons de découvrir de nouveaux livres. Vous arrive-t-il de **découvrir de nouveaux livres** souvent, quelquefois, rarement ou jamais... **NE PAS PRÉSENTER LES CHOIX DE FAÇON ALÉATOIRE.**
- a) en jasant avec vos amis ou des membres de votre famille?
  - b) en consultant les listes de livres à succès?
  - c) en vous basant sur les prix décernés ou les critiques favorables?
  - d) à la bibliothèque?
  - e) en explorant les grandes chaînes de librairies comme Chapters ou Renaud-Bray?
  - f) en explorant les librairies indépendantes?
  - g) en explorant les magasins de détail comme Wal-Mart, Costco, etc?
  - h) dans les salons du livre et les séances de lecture?
  - i) en explorant les sites web de détaillants de livres comme amazon.ca, archambault.ca, etc.?
  - j) sur les sites de réseaux sociaux?

Diriez-vous : **RÉPÉTEZ AU BESOIN.**

Souvent	1
Quelquefois	2
Rarement	3
Jamais	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

### Consommation

- D3. Est-ce que la fréquence à laquelle vous lisez des livres a augmenté, a diminué ou est demeurée la même au cours des douze derniers mois?
- |   |   |
|---|---|
| Elle a augmenté.  | 1 |
| Elle est demeurée la même.                              | 2 |
| Elle a diminué.   | 3 |
| Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> ) | 9 |

- D4. À quelle fréquence lisez-vous des livres électroniques? (**AU BESOIN** : Les livres électroniques sont une version numérique de livres que vous pouvez lire en utilisant un ordinateur, une tablette ou un lecteur électronique. Ils n'incluent pas les livres en format audio.) Diriez-vous... **LISEZ LA LISTE.**

Souvent	1
Quelquefois	2
Rarement	3
Jamais	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

- D5. Croyez-vous que dans douze mois... **LISEZ LA LISTE. NE PRÉSENTEZ PAS LES CHOIX DE RÉPONSES 3 ET 4 SI D4 = « jamais ».**

**NOTE POUR L'INTERVIEWEUR:** Si le répondant ne lit pas de livres électroniques aujourd'hui et n'a pas l'intention de le faire dans douze mois, sélectionnez l'option « autant que maintenant »

vous lirez des livres électroniques beaucoup plus souvent que vous le faites maintenant	1
un peu plus souvent que maintenant	2
un peu moins souvent que maintenant	3
beaucoup moins souvent que maintenant ou autant que maintenant?	4
	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

**SI D4 = « jamais », PASSEZ À D8.**

- D6. À quelle fréquence vous arrive-t-il de vous procurer des livres électroniques de l'une ou l'autre des façons suivantes? Est-ce que vous les procurez souvent, quelquefois, rarement ou jamais... **NE PRÉSENTEZ PAS LES CHOIX DE FAÇON ALÉATOIRE.**

- Sur le site d'Amazon?
- Sur Kobo?
- Sur Apple iBookstore?
- Dans les librairies?
- Vous les téléchargez gratuitement?
- Vous les partagez avec vos amis?

Diriez-vous : **RÉPÉTEZ AU BESOIN.**

Souvent	1
Quelquefois	2
Rarement	3
Jamais	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

D7. Comment lisez-vous normalement vos livres électroniques? **NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES PERTINENTES.**

Sur un lecteur électronique – un appareil portatif conçu principalement pour la lecture de livres électroniques, comme Kobo ou Kindle	1
Sur un téléphone intelligent comme un iPhone ou un Blackberry	2
Sur un ordinateur de bureau ou un portable	3
Sur une tablette comme un iPad, Samsung Galaxy ou Kindle Fire	4
Vous les imprimez.	5
Autre – veuillez préciser	77
Ne sait pas/Refuse de répondre	99

### Facteurs émotifs

D8. Veuillez indiquer dans quelle mesure vous êtes en accord ou non avec chacun des énoncés suivants concernant tous les livres, peu importe le format. Donc êtes-vous fortement en accord, en accord, ni en accord, ni en désaccord, en désaccord ou fortement en désaccord... : **NE PRÉSENTEZ PAS LES CHOIX DE FAÇON ALÉATOIRE.**

- Qu'il est important que les Canadiens aient accès à des livres canadiens.
- Vous pouvez facilement trouver des livres d'auteurs canadiens.
- Vous pouvez facilement trouver des livres d'auteurs non canadiens. **AU BESOIN** : Non-canadiens signifie provenant de l'extérieur du Canada, y compris des États-Unis, de l'Europe, et ainsi de suite.
- En lisant des livres canadiens autres que les ouvrages de fiction, vous vous informez sur des sujets qui touchent la vie des Canadiens.
- En lisant des livres canadiens de fiction, vous appréciez les récits racontés du point de vue canadien.

Diriez-vous que vous êtes : **RÉPÉTEZ AU BESOIN.**

Fortement en accord	1
En accord	2
Ni en accord, ni en désaccord	3
En désaccord	4
Fortement en désaccord	5
<b>[AFFICHEZ POUR b-e] Je ne lis pas ce genre d'ouvrage. (NE LISEZ PAS.)</b>	6
Ne sait pas/Refuse de répondre <b>(NE LISEZ PAS.)</b>	9

## E. Musique

### Découverte

E1. J'aimerais maintenant discuter de musique. Vous arrive-t-il de **découvrir de la nouvelle musique** souvent, quelque fois, rarement ou jamais ... **PRÉSENTEZ LES CHOIX DE FAÇON ALÉATOIRE.**

- a) en jasant avec vos amis ou des membres de votre famille?
- b) en écoutant la radio? (**AU BESOIN** : la radio AM/FM, telle que la radio dans votre voiture)
- c) sur les réseaux sociaux (Facebook, Twitter)?
- d) sur YouTube?
- e) sur des sites de musique en ligne comme iTunes?
- f) en écoutant les stations de radio en ligne?
- g) durant des concerts?
- h) dans les magasins de détail?
- i) lors d'événements de remise de prix comme le Gala de l'ADISQ (LA DISQUE)?
- j) dans les articles de journaux et de magazines?

Diriez-vous : **RÉPÉTEZ AU BESOIN.**

Souvent	1
Quelquefois	2
Rarement	3
Jamais	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

### Partage de musique sur les réseaux sociaux

E2. [**DEMANDEZ SI B2 = « oui »**] Dans les trois derniers mois, avez-vous utilisé les réseaux sociaux comme Facebook ou Twitter pour recommander de la musique à vos amis ou vos abonnés de Twitter?

Oui	1
Non	2
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

### Nouveaux services

E3. Dans quelle mesure est-ce probable que vous vous abonniez aux types de services suivants au cours des six prochains mois?

- a) Un service qui vous permet de choisir et d'écouter de la musique sur Internet, et ce, gratuitement, avec des publicités entre les chansons? **AU BESOIN** : Vous pouvez écouter autant de musique que vous voulez à partir d'un vaste répertoire d'artistes, gratuitement et en ligne. La musique ne vous appartient pas et vous devez écouter de la publicité.
- b) Un service qui vous permet de choisir et d'écouter de la musique de façon illimitée sur Internet sans publicité, moyennant des frais mensuels. Ce type de service coûte environ dix dollars par mois. **AU BESOIN** : Vous pouvez écouter autant de musique que vous voulez à partir d'un vaste répertoire d'artistes, tout cela en ligne. La musique ne vous appartient pas. Vous pouvez seulement l'écouter.

Diriez-vous : **LISEZ LA LISTE. RÉPÉTEZ AU BESOIN.**

Très probable	1
Probable	2
Peu probable	3
Pas du tout probable	4
Je suis déjà abonné à ce genre de service ( <b>NE LISEZ PAS.</b> )	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

E4. Dans quelle mesure est-ce probable que vous achetiez et que vous téléchargez de la musique sur Internet au cours des six prochains mois? Diriez-vous : **LISEZ LA LISTE. RÉPÉTEZ AU BESOIN.**

Très probable	1
Probable	2
Peu probable	3
Pas du tout probable	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

### Aspects émotifs et possibilités

E5. Dans quelle mesure êtes-vous en accord ou en désaccord avec les énoncés suivants? Donc êtes-vous fortement en accord, en accord, ni en accord, ni en désaccord, en désaccord ou fortement en désaccord... : **PRÉSENTEZ LES CHOIX DE FAÇON ALÉATOIRE.**

- a) Qu'il est important que les Canadiens aient accès à de la musique d'artistes canadiens.
- b) Écouter de la musique contribue à ma qualité de vie.
- c) Il est important pour vous en tant que Canadien(ne) que les artistes canadiens soient reconnus à l'échelle internationale.
- d) Vous pouvez facilement trouver de la musique d'artistes canadiens sur Internet.
- e) Vous pouvez facilement trouver de la musique d'artistes non canadiens sur Internet.



Diriez-vous que vous êtes : **RÉPÉTEZ AU BESOIN.**

Fortement en accord	1
En accord	2
Ni en accord, ni en désaccord	3
En désaccord	4
Fortement en désaccord	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

E6. Lequel des quatre énoncés suivants décrit le mieux la façon dont vous achèterez votre musique à l'avenir? **LISEZ LA LISTE. NE PRÉSENTEZ PAS LES CHOIX DE FAÇON ALÉATOIRE.**

Option 1 : Vous ne ferez que télécharger de la musique sur Internet.	1
Option 2 : Vous téléchargerez <b>la majorité</b> de votre musique sur Internet	2
Option 3 : Vous achèterez en majorité <b>des CD ou des disques.</b>	3
Option 4 : Vous ne prévoyez acheter que des CD et des disques à l'avenir.	4
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

## F. Cinéma

F1. J'aimerais maintenant discuter de cinéma. À quelle fréquence...

- allez-vous au cinéma ou au ciné-parc?
- louez-vous des films d'une boutique de location?
- achetez-vous des DVD ou des Blu-rays?
- regardez-vous des films de vidéo-sur-demande (VSD) ou de services à la carte? (**AU BESOIN : Ceci n'inclue pas Netflix**)
- regardez-vous des films présentés sur les chaînes de télévision traditionnelles?
- téléchargez-vous et écoutez-vous des films sur Internet en utilisant un service comme Netflix ou iTunes?
- regardez-vous des films sur des appareils mobiles comme un iPod, un téléphone cellulaire ou une tablette?
- regardez-vous des films en avion sur le système de visionnement à bord de l'appareil?
- regardez-vous des films en utilisant un service à la carte à l'hôtel?

Diriez-vous : **LISEZ LA LISTE. RÉPÉTEZ AU BESOIN.**

À tous les jours	1
Au moins une fois par semaine	2
Quelques fois par mois	3
Quelques fois par année	4
Jamais	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

F2. Avez-vous déjà entendu parler des films suivants : **PRÉSENTEZ LES CHOIX DE FAÇON ALÉATOIRE.**

- a) Laurence Anyways
- b) Resident Evil: l’Au-delà (version française de Resident Evil : Afterlife)
- c) Incendies
- d) Monsieur Lazhar
- e) Une méthode dangereuse (version française de A Dangerous Method)
- f) Goon : Dur à cuire (version française de Goon)
- g) Le monde de Barney (version française de Barney’s Version)
- h) Starbuck

Oui	1
Non	2

F3. Dans quelle mesure êtes-vous en accord ou en désaccord avec les énoncés suivants? Donc êtes-vous fortement en accord, en accord, ni en accord, ni en désaccord, en désaccord ou fortement en désaccord que... : **PRÉSENTEZ LES CHOIX DE FAÇON ALÉATOIRE.**

- a) Il est important que les Canadiens aient accès aux films canadiens.
- b) Vous êtes intéressé par les films canadiens.
- c) Vous vous identifiez aux histoires présentées dans les films canadiens.
- d) Vous pouvez facilement trouver et regarder des films canadiens.
- e) Les films canadiens sont bien annoncés et font l’objet d’une bonne promotion.
- f) Les salles de cinéma devraient présenter plus de films canadiens.
- g) Les diffuseurs canadiens devraient présenter plus de films canadiens à la télévision.

Diriez-vous que vous êtes : **RÉPÉTEZ AU BESOIN.**

Fortement en accord	1
En accord	2
Ni en accord, ni en désaccord	3
En désaccord	4
Fortement en désaccord	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

F4. **[DEMANDEZ SI B2 = « oui ».]** Au cours des trois derniers mois, avez-vous utilisé les médias sociaux comme Facebook ou Twitter pour recommander un film à vos amis ou vos abonnés de Twitter?

Oui	1
Non	2
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

## G. Renseignements démographiques

Il ne me reste plus que quelques questions qui serviront à analyser les résultats.

### G1. ENTREZ LE SEXE DU RÉPONDANT {NE LE DEMANDEZ PAS.}

Homme	1
Femme	2

### G2. Quelle est votre année de naissance?

(Notez l'année : \_\_\_\_)

### G3. Parmi les diplômes suivants, quels sont ceux que vous avez obtenus? **LISEZ LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES PERTINENTES.**

Diplôme d'études secondaires ou l'équivalent	1
Apprentissage enregistré ou diplôme ou certificat d'une école de métiers	2
Diplôme d'études collégiales (p. ex., CEGEP), ou certificat ou diplôme non universitaire	3
Grade, certificat ou diplôme universitaire	4
Aucun	5
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

### G4. Quelle langue parlez-vous le plus souvent à la maison? **LISEZ LA LISTE. ACCEPTEZ DEUX RÉPONSES AU MAXIMUM.**

Anglais	1
Français	2
Autre – veuillez préciser :	77
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	99

### G5. À combien s'élève le revenu total de votre ménage, c'est-à-dire le total des revenus avant impôts de toutes les personnes qui habitent avec vous? Diriez-vous : **LISEZ LA LISTE.**

Moins de 20 000 \$	1
De 20 000 \$ à moins de 40 000 \$	2
De 40 000 \$ à moins de 60 000 \$	3
De 60 000 \$ à moins de 80 000 \$	4
De 80 000 \$ à moins de 100 000 \$	5
De 100 000 \$ à moins de 150 000 \$	6
150 000 \$ et plus	7
Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> )	9

G6. Vous considérez-vous comme... **LISEZ LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES PERTINENTES.**

**(LISEZ AU BESOIN** : Au Canada, un membre d'un groupe minoritaire visible peut être défini comme une personne [**autre qu'un autochtone**] qui n'est pas de couleur/race blanche, et ce peu importe son lieu de naissance. Voici des exemples de groupes minoritaires visibles : les Noirs, les Chinois, les Philippins, les Japonais, les Coréens, les Asiatiques du Sud/Ressortissants des Indes orientales, les Asiatiques du Sud-Est, les habitants non blancs de l'Asie occidentale, les Africains du Nord ou les Arabes, les Latino-américains non blancs, les personnes de plusieurs origines [dont un parent appartient à l'un des groupes minoritaires visibles de la liste], ou d'autres groupes minoritaires visibles.)

- |   |   |
|---|---|
| Une personne ayant un handicap                          | 1 |
| Un membre d'une minorité visible                        | 2 |
| Une personne autochtone                                 | 3 |
| Aucun de ces énoncés                                    | 4 |
| Ne sait pas/Refuse de répondre ( <b>NE LISEZ PAS.</b> ) | 9 |

# Appendix B – Methodologies for Comparative Analysis



Canadian  
Heritage

Patrimoine  
canadien



# Research Methodology – 2008 Books Study

Important methodological considerations related to this study are as follows:

- ✓ Data collection was conducted via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology.
- ✓ Data collection for this study was conducted from June 5<sup>th</sup> to June 22<sup>nd</sup>, 2008.
- ✓ Random probability sampling was conducted, using the most up-to-date and accurate sample available giving every Canadian household with a valid telephone number an equal chance of being selected for the study.
- ✓ All respondents were given the choice of conducting the survey in English or French.
- ✓ A total of n=1,502 respondents 15 years of age or older, completed the survey.
- ✓ Based on the Market Research and Intelligence Association (MRIA) calculation, the response rate for this study was 4.0%.
- ✓ The data is weighted to replicate actual population distributions by age and sex within each region according to 2006 Census data.
- ✓ Given the sampling approach and the sample size, we can confidently establish that the results for this study are representative of the adult Canadian population.

Segment	Sample size (n)	Margin of error
<b>Total (Canada)</b>	1,502	+/-2.5%
<b>Provinces / Regions</b>		
Atlantic*	150	+/- 8.0%
Quebec	451	+/-4.6%
Ontario	400	+/-4.9%
Manitoba/ Saskatchewan	150	+/-8.0%
Alberta	175	+/-7.4%
British Columbia	176	+/-7.4%
<b>Age Groups**</b>		
15-34	378	+/-5.0%
35-54	497	+/-4.4%
55+	590	+/-4.0%

\**Atlantic* includes the following provinces: New Brunswick, Prince Edward Island, Nova Scotia, and Newfoundland and Labrador.

\*\*The sample sizes for age do not include respondents who indicated "Don't know/Refuse", therefore the sum of the sub-segments may not add up to the full sample size.

# Research Methodology – 2005 Film Study

Important methodological considerations related to this study are as follows:

- ✓ Data collection was conducted via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology.
- ✓ Data collection for this study was conducted from May 23<sup>rd</sup> to May 31<sup>st</sup>, 2005.
- ✓ Random probability sampling was conducted, using the most up-to-date and accurate sample available giving every Canadian household with a valid telephone number an equal chance of being selected for the study.
- ✓ All respondents were given the choice of conducting the survey in English or French.
- ✓ A total of n=2,002 respondents 15 years of age or older, completed the survey.
- ✓ The data is weighted to replicate actual population distributions by age and sex within each region according to 2001 Census data.
- ✓ Given the sampling approach and the sample size, we can confidently establish that the results for this study are representative of the adult Canadian population.

Segment	Sample size (n)	Margin of error
<b>Total (Canada)</b>	2,002	+/-2.2%
<b>Provinces / Regions</b>		
Atlantic*	250	+/- 6.2%
Quebec	750	+/-3.6%
Ontario	400	+/-4.9%
Manitoba/ Saskatchewan	202	+/-6.9%
Alberta	200	+/-6.9%
British Columbia	200	+/-6.9%
<b>Age Groups**</b>		
15-34	762	+/-3.6%
35-54	764	+/-3.6%
55+	455	+/-4.6%

\**Atlantic* includes the following provinces: New Brunswick, Prince Edward Island, Nova Scotia, and Newfoundland and Labrador.

\*\*The sample sizes for age do not include respondents who indicated "Don't know/Refuse", therefore the sum of the sub-segments may not add up to the full sample size.

# Research Methodology – 2008 Periodicals Study

Important methodological considerations related to this study are as follows:

- ✓ Data collection was conducted via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology.
- ✓ Data collection for this study was conducted from April 17<sup>th</sup> to May 5<sup>th</sup>, 2008.
- ✓ Random probability sampling was conducted, using the most up-to-date and accurate sample available giving every Canadian household with a valid telephone number an equal chance of being selected for the study.
- ✓ All respondents were given the choice of conducting the survey in English or French.
- ✓ A total of n=1,500 respondents 15 years of age or older, completed the survey.
- ✓ Based on the Market Research and Intelligence Association (MRIA) calculation, the response rate for this study was 2.6%.
- ✓ The data is weighted to replicate actual population distributions by age and sex within each region according to 2006 Census data.
- ✓ Given the sampling approach and the sample size, we can confidently establish that the results for this study are representative of the adult Canadian population.

Segment	Sample size (n)	Margin of error
<b>Total (Canada)</b>	1,500	+/- 2.5%
<b>Provinces / Regions</b>		
Atlantic*	150	+/- 8.0%
Quebec	450	+/- 4.6%
Ontario	400	+/- 4.9%
Manitoba/ Saskatchewan	150	+/- 8.0%
Alberta	175	+/- 7.4%
British Columbia	175	+/- 7.4%
<b>Age Groups**</b>		
15-34	354	+/- 5.2%
35-54	594	+/- 4.0%
55+	525	+/- 4.3%

\**Atlantic* includes the following provinces: New Brunswick, Prince Edward Island, Nova Scotia, and Newfoundland and Labrador.

\*\*The sample sizes for age do not include respondents who indicated "Don't know/Refuse", therefore the sum of the sub-segments may not add up to the full sample size.



# Research Methodology – 2008 Music Study

Important methodological considerations related to this study are as follows:

- ✓ Data collection was conducted via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology.
- ✓ Data collection for this study was conducted from June 24<sup>th</sup> to July 15<sup>th</sup>, 2008.
- ✓ Random probability sampling was conducted, using the most up-to-date and accurate sample available giving every Canadian household with a valid telephone number an equal chance of being selected for the study.
- ✓ All respondents were given the choice of conducting the survey in English or French.
- ✓ A total of n=1,505 respondents 15 years of age or older, completed the survey.
- ✓ Based on the Market Research and Intelligence Association (MRIA) calculation, the response rate for this study was 6.1%.
- ✓ The data is weighted to replicate actual population distributions by age and sex within each region according to 2006 Census data.
- ✓ Given the sampling approach and the sample size, we can confidently establish that the results for this study are representative of the adult Canadian population.

Segment	Sample size (n)	Margin of error
<b>Total (Canada)</b>	1,505	+/-2.5%
<b>Provinces / Regions</b>		
Atlantic*	150	+/- 8.0%
Quebec	450	+/-4.6%
Ontario	400	+/-4.9%
Manitoba/ Saskatchewan	153	+/-8.0%
Alberta	176	+/-7.4%
British Columbia	176	+/-7.4%
<b>Age Groups**</b>		
15-34	435	+/-4.7%
35-54	522	+/-4.3%
55+	503	+/-4.4%

\**Atlantic* includes the following provinces: New Brunswick, Prince Edward Island, Nova Scotia, and Newfoundland and Labrador.

\*\*The sample sizes for age do not include respondents who indicated "Don't know/Refuse", therefore the sum of the sub-segments may not add up to the full sample size.