
Canadian Film and Music Opinion Study

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Research Objectives and Methodology

Research Objectives and Methodology

- The Department of Canadian Heritage Film, Video and Sound Recording Branch (DGFSP) wanted to determine what the attitudes and behaviours of Canadians are toward Canadian film and music. More specifically, they are interested in determining:
 - The awareness of Canadian film and music
 - Levels of satisfaction with Canadian film and music
 - Purchasing behaviours of DVDs and CDs
 - Attendance at movie theatres and live music performances
- Using Decima's CATI (Computer-Assisted Telephone Interviewing) technology, a total of 2,002 interviews were conducted within Canada's general population aged 15 and older.
- Due to the recent success of the feature film industry in the Quebec market, Quebec residents are of particular interest in this study. A decision was made to collect 750 of the 2,002 interviews from Quebec in order to ensure a sufficient sample is obtained for a more detailed analysis of the Quebec market.
- The associated statistical margin of error (at a 95% level of confidence) for each question asked to all respondents is +/- 2.2%. Some results are based on smaller sub-segments of the total survey sample (and have been identified where applicable), and so the margin of error will be greater.
- Results in this report have been provided for the following population subgroups: by region, language in which the survey was completed, age, gender, household income, education level attained, visible minority and/or aboriginal status, and urban versus rural residence.
- Additional analysis was also conducted with respondents that go to a movie theatre at least once a month. As well, respondents were categorized based on how many specific Canadian films they have seen (a detailed description is provided in the footnote on slide 25).

Research Objectives and Methodology

- The regional distribution of the interviews, along with their associated margins of error, are outlined below:

		<u>Error Interval</u>
Atlantic	250 interviews	+/- 6.2 %
Quebec	750 interviews	+/- 3.6 %
Ontario	400 interviews	+/- 4.9 %
Manitoba/Saskatchewan	202 interviews	+/- 6.9 %
Alberta	200 interviews	+/- 6.9 %
<u>British Columbia</u>	<u>200 interviews</u>	<u>+/- 6.9 %</u>
Total Canada	2,002 interviews	+/- 2.2 %

- It is important to note that the margins of error outlined in this section 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. For instance, the margin of error associated with a question where 50% of respondents answered in the affirmative will differ from a question where 15% of respondents answered in the affirmative (assuming the same sample size for both questions.)

Research Objectives and Methodology

- The data is weighted in tabulation to replicate the actual population distribution by gender, age and region according to the 2001 Census data. Percentages are based on total answering respondents. Those who answer “do not know” or “refuse” are not included as part of the total answering population.
- This report features top-4-box scores. A top-4-box score represents the sum of the top four scaled responses in a question. For example, in an agreement question with a ten-point scale (strongly agree as a “10” through to strongly disagree as a “1”), the top-4-box score would represent the results of those that strongly agreed and gave a response of 7, 8, 9 or 10.
- In some cases, the values in the top-4-box score fields in this report may differ slightly from those in the data tables (provided to the client). This slight discrepancy is attributable to rounding.
- Frequencies identified in bolded, underlined, italicized text are values significantly higher than frequencies in another segment of the population.
- For questions where ranges are used as a method to summarize responses (e.g. 1 to 5 hours), a midpoint is used so that it is possible to estimate the average (e.g. the average amount of time spent among respondents).
- Of the 2,002 interviews completed, a total of 693 were completed in French. Residents of Quebec make up 691 of these French respondents, with only 2 interviews completed in French outside of Quebec. The remaining 59 respondents in Quebec conducted their interviews in English.
- When applicable, the current research will compare to one or more of three previous research studies:
 - “Canadians at the Movies: Attitudes and Behaviour Toward Canadian Cinema”, 1998, Angus Reid Group, interviews 1,501 Canadian adults.
 - “The Associated Press/AOL Poll: Movies Study”, 2005, Ipsos-Public Affairs, interviews 1,000 American adults.
 - “Motion picture theatres and drive-ins”, Canada 1998/99 to 2003/04, Statistics Canada

Overview of Results

Overview of Results

The Objectives and the Approach

- The Department of Canadian Heritage Film, Video and Sound Recording Branch (DGFSP) want to determine what the attitudes and behaviours of Canadians are toward Canadian feature film and Canadian music.
- To achieve this, they conducted a survey using CATI (Computer-Assisted Telephone Interviewing) technology. A total of 2,002 telephone interviews were conducted between May 23 and 31, 2005. Surveys were conducted across all Canadian regions, with an oversample of 750 interviews in Quebec.

The Results – Canadian Feature Film Industry

How Often and Where Canadians View Movies

- According to a recent Statistics Canada survey, movie theatre attendance has dropped over 2003-2004, halting an upward trend of more than a decade.
- Results in this report show that half of Canadians go to the movies at least once every three months. However, due to various external factors, such as cost, time and various matters of convenience, Canadians watch more movies at home, on conventional and specialty television or on a movie channel, by renting movies or watching from their own personal movie collection.
- In recent years, two new technologies have emerged as a means by which people can watch movies. These are video-on-demand (VOD), and downloading movies from the Internet. Although a very low proportion of the population watch movies using these new technologies, this is likely to change in the years to come as more television service providers introduce and promote VOD and as higher broadband access becomes more mainstream.
- Younger respondents watch more movies in general. The frequent moviegoers tend to be younger men, living in urban areas, and earning higher annual household incomes.
- The most important influences on movie selection at the theatre are the story, what has been heard through word-of-mouth, and the actors starring in the movie.

Overview of Results

Language Preference

- Four-fifths of the Canadian population generally watch movies in English, while Quebec respondents watch about a quarter of their movies in French. One-third of the respondents from Quebec would prefer to see English movies in the original English version, a large proportion when compared to respondents in the rest of Canada, for whom the vast majority would prefer to see movies produced in French either dubbed or subtitled in English.

Renting and Buying Movies

- Two-thirds of Canadians rent movies at least once every three months, in contrast with how often they buy movies, which averages a few times a year. Younger respondents are more likely to both rent and buy movies when compared to older respondents.
- Similar factors impact movie rental and movie purchase selection. This includes the content of the movie, awareness of the movie (for example, hearing about the movie through word-of-mouth), what is seen by way of advertising, and the actors starring in the movie. Factors that are generally more common when it comes to purchasing movies include a desire to own the movie because it was really well-liked, cost, and an interest in watching the movie multiple times.

Movie Genre Preferences

- Favourites among Canadians when it comes to movie genres are comedies, dramas, spy movies or thrillers, and action films. Comedies, action flicks and horror films are more likely to be favoured by younger Canadians. Quebec residents are more likely to be interested than the rest of Canada in thrillers, art films and foreign films.

Overview of Results

Awareness and Viewership of Canadian Feature Film

- The top three Canadian feature films that Canadians have heard of and have seen are all English movies: Men with Brooms, Mambo Italiano, and Resident Evil: Apocalypse. The top three in terms of both awareness and viewership among Quebec residents are: Les Invasions barbares, Séraphin and La Grande séduction – all French Canadian feature films.
- As well, Quebec residents have both heard of and have seen more of the Canadian feature films listed than those residing in the rest of Canada. More specifically, at least 4 out of 5 Quebec residents have heard of 6 of the 8 French movies listed. In the rest of Canada, about half of the respondents (ranging from 25% to 68%) have heard of the English films listed. Thus French films are quite successful in Quebec, as compared to English films in the rest of Canada.

Attitudes Toward Canadian Feature Film

- The majority of Canadians agree that it is important for Canadian movies to be seen in movie theatres in Canada. Canadians also believe that Canadian movies should be made available to be seen on television.
- About one-quarter of Canadians believe that Canadian movies are not available in movie theatres or video stores.
- The majority of Canadians believe that people would watch more Canadian movies if they were promoted and advertised better.
- Half of Canadians consider the quality of Canadian-made films as good as movies made in other countries, and that over the past couple of years, the Canadian film industry has begun to make better films.

Overview of Results

The Results – Canadian Music Industry

Perceptions of Quality of Canadian Music

- Canadians think that Canadian music can hold its own on the international stage. The vast majority (93%) view it as equal to or better than music made by foreign artists.

Listening Habits of Canadians

- When Canadians listen to music or when they discover new music, most cited the radio as their primary and most frequent source. CDs and mp3s are also a frequent and important way of accessing music. Canadians listen to music for close to 19 hours on average per week.

Music-Related Technologies

- Over 80% of Canadians have access to a computer and to a DVD player, two-thirds have access to a cell phone and over half have access to a CD burner. Emerging technologies include portable digital music players (2 in 5 Canadians) and DVD burners (1 in 3).

Music Preference

- Favourite types of music among Canadians are rock music, current hits or pop, and country music. Residents in the rest of Canada when compared with Quebec residents, are more likely to prefer rock and country music, whereas Quebec residents are more likely to prefer current hits or pop, jazz or blues, and world music.
- Men by far prefer to listen to rock music over any other types of music, whereas women are more eclectic in their tastes and listen to a wider variety of music in general.

Overview of Results

Language Preference

- Canadians listen to three-quarters (74%) of their music in English, and 10% of their music in French.
- Other languages listened to by Canadians include Spanish, Italian, and German music.

Purchasing Behaviour

- Canadians buy, on average, 10 CDs per year, four of which are CDs by Canadian artists. Purchasing trends in terms of quantity are similar across the country; however, Quebec residents have a tendency to purchase more Canadian CDs than residents living in the rest of Canada.
- Traditional retail music stores are the place of choice for most Canadians to purchase their music, followed by big box store formats.
- Almost half of Canadians have purchased at least one music DVD over the past year.
- The vast majority of Canadians have access to the Internet, either at home, at work or elsewhere. While downloading free music from the Internet is prominent, on-line paid services are growing. About one-third of downloaded music, whether purchased or downloaded for free, is Canadian music. Younger Canadians are more likely to use this technology.
- Just over one-tenth of Canadian cell phone users have purchased at least one ringtone for their cell phone in the past year. Again, younger Canadians are the most active consumers of this product.

Overview of Results

Finding Music at Retail Stores Versus On-line

- Canadians generally agree that they can easily find Canadian music in retail stores, and less likely to agree that finding Canadian music on-line is easy. Canadians are just as likely to agree that foreign music is easy to find in stores as they are to agree that the same music is easy to find on-line (about 4 in 10 agree).

Live Music Performances

- Close to half of the Canadian population has attended at least one live music performance within the past year, which includes performances by amateur and professional musicians, singers and bands. A significant proportion of these performances is by Canadian artists, indicative of the many festivals and pub performances that are an important part of our Canadian culture, and a favourite activity among Canadians. Attendees tend to be younger or have a higher annual household income.

Detailed Results

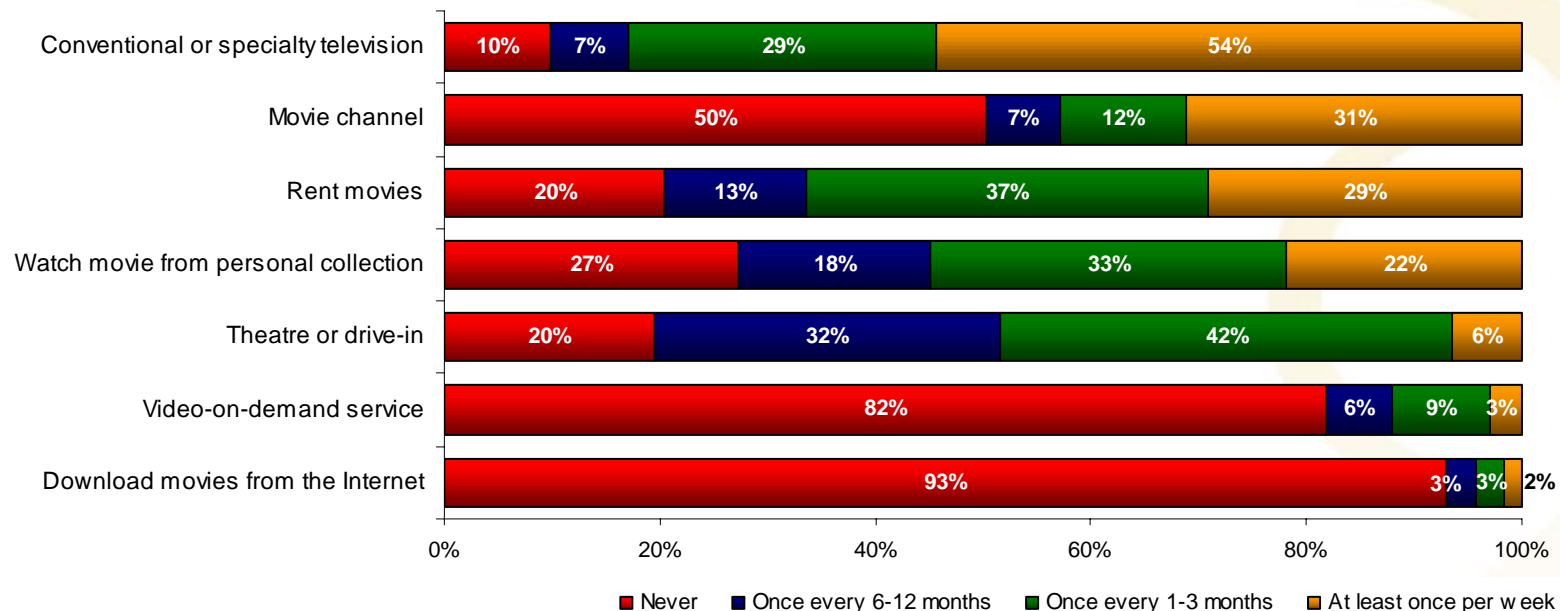
Canadian Film Industry

How Often and Where Canadians View Movies



How Often and Where Canadians View Movies

- Today, Canadians can access movies a variety of ways. This research measures which approaches and technologies are used and how often they are used throughout the course of an average year. Results show that television is the dominant means of watching movies, either via a conventional or specialty television channel (54% do so at least once per week) or a dedicated movie channel (31%). It should be noted that fully 50% of Canadians never watch a dedicated movie channel.
- Twenty-nine percent of Canadians rent movies at least once per week, followed closely by watching movies from personal collections at 22%.
- While 80% “go to the movies” at least once a year, only 6% go at least once per week.
- Downloading movies from the Internet and video-on-demand (VOD) are still relatively new ways to watch movies. A full ninety-three percent of Canadians do not typically download and watch movies from the Internet, and 82% do not typically watch movies using a VOD service.



How Often and Where Canadians View Movies

- Comparisons were made between segments by focusing on those who watch movies via each method at least once every three months (based on A1. How often do you watch movies?)
- Men are more likely than women to do each of the following at least once every three months: rent movies (70% vs. 63%), go to a movie theatre or drive-in (53% vs. 45%), and download and watch movies (6% vs. 3%).
- Younger Canadians, specifically those 15 to 20, watch movies, through all means, more often than older Canadians. Some of the biggest differences are seen with renting movies (88% vs. 34% for 55 and over) and watching movies at a theatre or drive-in (84% vs. 24%).
- Urban residents are more likely than rural residents to do each of the following at least once every three months: rent movies (70% vs. 62%), watch movies from their own collection (56% vs. 50%), watch movies in a theatre or drive-in (54% vs. 42%) and download movies from the Internet (5% vs. 2%). Conversely, rural residents are more likely to watch a dedicated movie channel (53% vs. 41%).
- For more details including differences based on annual household income please refer to the table below. Frequencies identified in bolded, underlined, italicized text are values significantly higher than frequencies in another segment of the population.

Percentage of Respondents Who Do the Following at Least Once Every Three Months*	Overall	Men	Women	15-20	21-34	35-54	55+	Urban	Rural	<\$40K	\$40K-\$60K	\$60K-\$80K	\$80K+
Watch movies on conventional/specialty TV (n=1,657)	83%	82%	84%	<u>89%</u>	82%	85%	80%	83%	86%	79%	<u>85%</u>	<u>87%</u>	83%
Rent movies (n=1,370)	66%	<u>70%</u>	63%	<u>88%</u>	<u>85%</u>	73%	34%	<u>70%</u>	62%	54%	69%	71%	<u>83%</u>
Watch movies from personal collection (n=1,087)	55%	<u>56%</u>	54%	<u>80%</u>	<u>68%</u>	57%	33%	<u>56%</u>	50%	50%	<u>58%</u>	57%	<u>59%</u>
Watch movies in a theatre or drive-in (1,043)	49%	<u>53%</u>	45%	<u>84%</u>	<u>67%</u>	45%	24%	<u>54%</u>	42%	39%	45%	<u>55%</u>	<u>59%</u>
Watch a movie channel (n=855)	43%	42%	43%	<u>57%</u>	<u>48%</u>	41%	35%	41%	<u>53%</u>	42%	42%	44%	43%
Use a video-on-demand service (n=249)	12%	13%	11%	<u>21%</u>	<u>16%</u>	11%	7%	12%	11%	9%	13%	15%	<u>15%</u>
Download/watch movies from the Internet (n=92)	4%	<u>6%</u>	3%	<u>13%</u>	<u>11%</u>	1%	<1%	<u>5%</u>	2%	6%	4%	4%	5%

* Results on this page may differ from those on the previous page and from those in the data tables due to rounding.

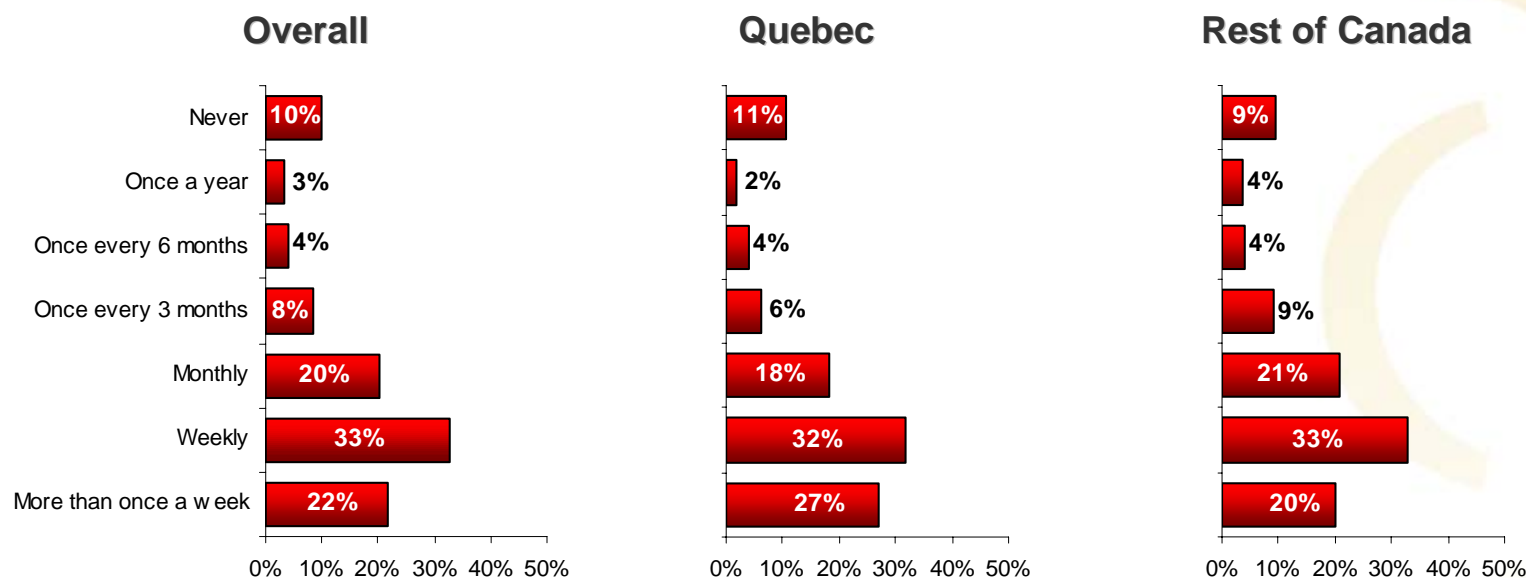
Note: Frequencies identified in underlined, bolded, italicized text are those values significantly higher than those in another segment of the population.

Question: A1. How often do you watch movies ...

Base: Watch movies at least once every three months (n varies with method)

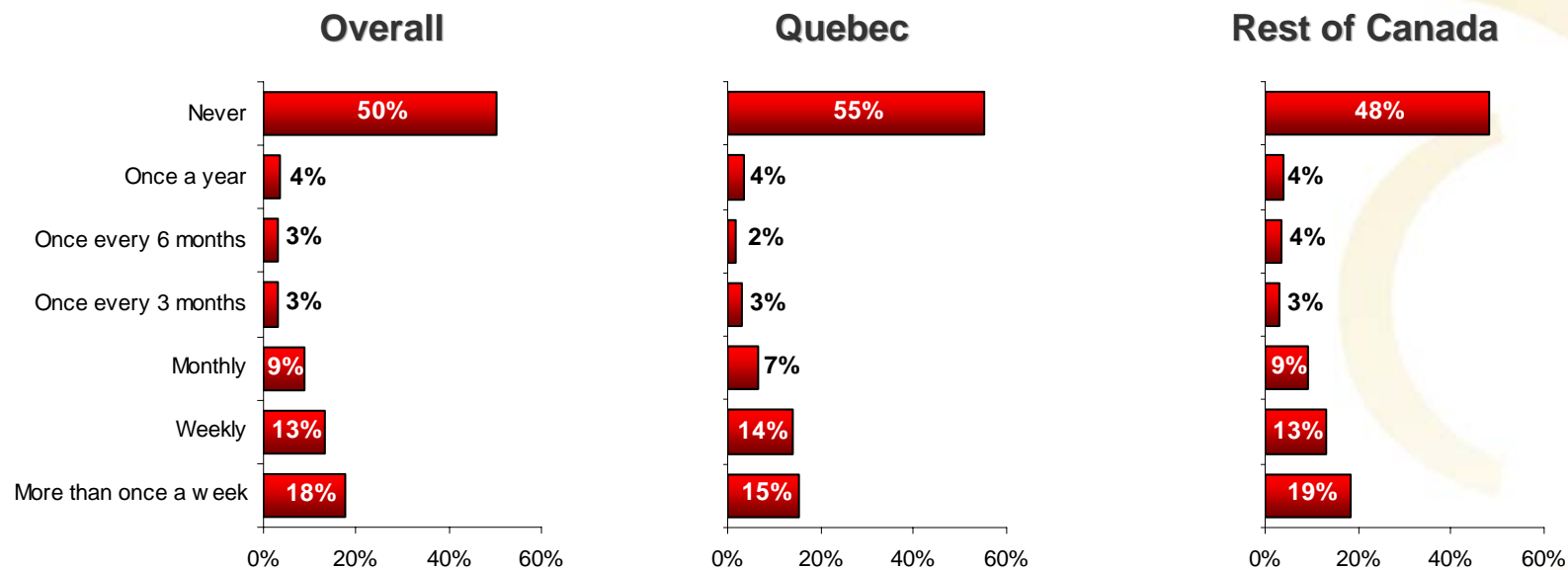
Watching Feature Films on Conventional or Specialty Television

- As the results in the previous summary pages show, Canadians seem to watch most of their feature films through a conventional or specialty television channel, in other words a channel featuring various types of programming that includes feature films. Detailed results show that over three-quarters of respondents watch movies on television at least once a month and that nearly one-quarter of Canadians take in a movie this way more than once a week.
- Residents of Quebec are slightly more likely to watch movies on television, with 59% watching a movie on television at least once a week, compared to 53% among Canadians in other provinces.



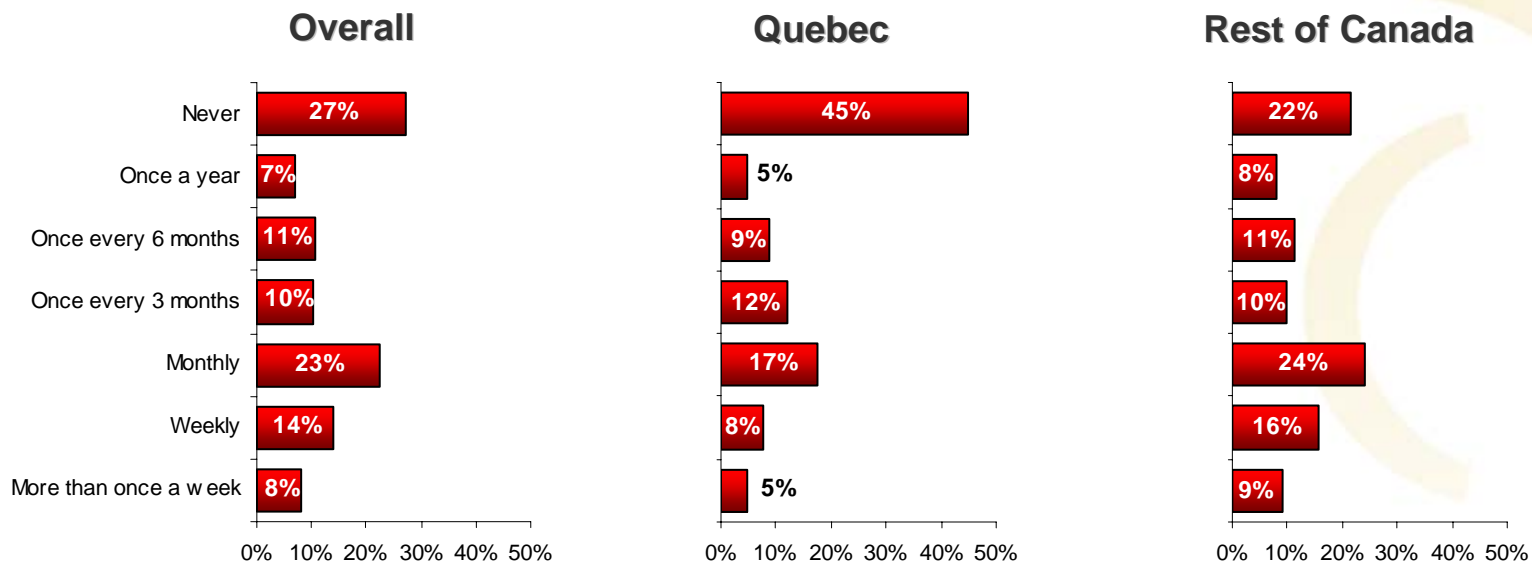
Watching a Dedicated Movie Channel

- In addition to watching movies on a conventional or specialty television channel, Canadians can also access movies through a variety of dedicated movie channels entirely devoted to showing movies. Canadians using this approach to watch movies appear to be a committed and select group within the population – in other words, no more than half of Canadians watch movies this way, and those who do, do so a lot. More specifically, 31% (or three out of every five “users”) watch movies at least once a week.
- Generally, residents of Quebec are less likely than other Canadians to watch movies over a dedicated movie channel (45% vs. 52%). As well, considering all regions, British Columbia residents watch a movie channel the least often, with 62% indicating that they never watch a dedicated movie channel.



Watching Movies from Their Own Collection

- Canadians also seem to enjoy watching movies from their own personal collection. Over half watch their own movies at least once every 3 months while 27% never watch movies from their own collection (which we can only assume includes Canadians who do not own movies).
- We see significant differences between respondents in Quebec and those in the rest of Canada. While almost one-half (45%) of Quebec residents indicate that they never watch movies from their own collection, this compares to 22% among residents in the rest of Canada. In fact, residents of Quebec are the least likely to watch from their collection. They are followed distantly behind respondents in Atlantic Canada where 29% never watch from their own collection. These are notable differences considering equivalent proportions in Alberta and in Manitoba/Saskatchewan are about 16%.

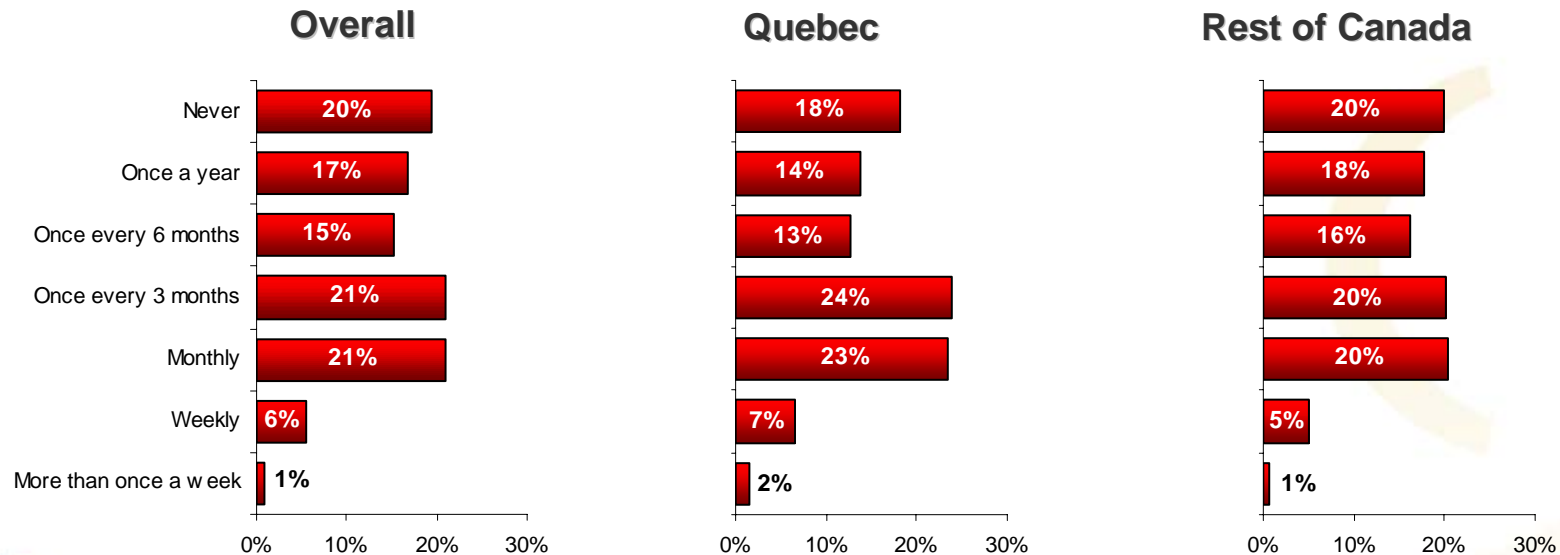


Question: A1g. How often do you watch movies from your own collection?
Base: All respondents (n=2002)

Frequency of Watching Movies at a Theatre or Drive-In

- Almost half (49%) of Canadians watch movies at a theatre or drive-in at least once every three months. Within this group, 1% attend more than once a week, 6% attend weekly, 21% attend monthly and 21% attend once every three months. Less frequent moviegoers may attend once every 6 months (15%) or once a year (17%). Twenty percent of Canadians claim to never “go to the movies.”

According to a 2003/04 Statistics Canada Motion Picture Theatres survey, movie attendance at theatres and drive-ins combined had dropped by 4.6%. This had been in contrast with an upward trend seen for over a decade. It is quite possible that the SARS scare may have contributed to this drop in attendance, particularly in Toronto and Vancouver. Comparing our results in 2005 with the 1998 study conducted by the Angus Reid Group for PCH, movie theatre attendance has slightly increased. Looking at the percent of Canadians who attend a movie theatre at least once every 3 months, attendance has increased from 46% in 1998 to 49% in 2005. This seems to suggest that Canadians have yet to return to the movies in any significant fashion.



Factors Influencing Decisions Not to Attend More Movies at the Movie Theatre

- Respondents were asked to explain why they do not attend more movies at the movie theatre. The claim that **it is expensive** is by far the most dominant reason provided, though it is important to note that respondents referred to price or expensiveness in general. While one can probably safely assume that most respondents are referring to the price of admission, it is possible that some are also referring to the broader cost of going to a movie theatre which may include expenses related to snacks, parking or transit and babysitting. This research did not delve into details surrounding these expenses.
- Secondary reasons given for not attending more movies at the theatre include **a basic lack of interest (29%), a lack of time (25%)** and that it is **inconvenient (21%)**.
- Other reasons influencing attendance include **a preference for watching movies at home (10%), accessibility (4%),** and **a dislike of crowds and noise (5%)**.
- Quebec residents are less likely to consider cost as a barrier than the rest of Canada (29% vs. 45%, respectively). One reason why cost may not be as much of a consideration with Quebec residents as it is with residents in the rest of Canada is because the average ticket price for admission is lower in Quebec. According to Statistics Canada, the national average admission price in 2003/04 is \$7.45, with Quebec averaging at \$6.83, as compared to averages in the rest of Canada as high as \$8.22 in Ontario.
- Other segments more likely to consider cost as a barrier are urban respondents (42% vs. 31% among those in rural areas), and younger Canadians (about 50% among 15 to 54 year olds compared to only 22% among older respondents).
- Interest levels are more likely to be an issue for urban residents (29% vs. 21% among rural residents), and those aged 55 and older (44% vs. 23% among younger respondents).
- A lack of time is a relatively more common reason given in Quebec (34% vs. 22% among respondents from the rest of Canada) and among respondents under 55 years of age (just over one quarter compared to only 13% among respondents over 55 years of age).
- Convenience, or lack thereof, is a more common response among residents in the rest of Canada (22% vs. 16% of Quebec residents) and among rural residents (38% vs. 17% among urban residents).

Factors Influencing Decision Not to Attend More Movies at the Movie Theatre

Factors Influencing Decision Not to Attend Movie Theatre	Overall	Quebec	Rest of Canada	Urban	Rural	15-20	21-34	35-54	55+
Too Expensive	41%	29%	<u>45%</u>	<u>42%</u>	31%	<u>54%</u>	<u>51%</u>	<u>47%</u>	<u>22%</u>
Interest (Net)	29%	28%	30%	<u>29%</u>	21%	23%	22%	24%	<u>44%</u>
Don't like what's playing	21%	15%	<u>24%</u>	<u>20%</u>	13%	20%	18%	18%	<u>29%</u>
Not interested/have other interests	7%	<u>11%</u>	5%	7%	7%	4%	3%	5%	<u>13%</u>
Don't like/go to the movie theatre	2%	2%	2%	<u>2%</u>	<1%	1%	1%	1%	<u>3%</u>
Don't watch (many) movies	1%	<u>1%</u>	<1%	1%	1%	--	--	1%	1%
No time	25%	<u>34%</u>	22%	28%	25%	<u>25%</u>	<u>27%</u>	<u>31%</u>	13%
Convenience (Net)	21%	16%	<u>22%</u>	17%	<u>37%</u>	17%	<u>25%</u>	21%	18%
No theatre in my area	10%	8%	10%	6%	29%	10%	9%	9%	12%
Have children/can't get babysitter	5%	4%	5%	4%	4%	1%	<u>11%</u>	<u>6%</u>	<1%
Convenience/hassle to go	4%	3%	4%	4%	4%	5%	3%	4%	4%
Show times are not convenient	3%	2%	4%	3%	4%	1%	3%	<u>4%</u>	3%
Home Preference (Net)	10%	11%	9%	10%	10%	7%	6%	<u>13%</u>	9%
Prefer to watch movies at home	7%	9%	6%	8%	6%	5%	4%	<u>10%</u>	6%
It will be out on video soon	3%	3%	3%	3%	5%	1%	2%	<u>4%</u>	3%
Accessibility (Net)	4%	5%	4%	3%	2%	1%	1%	1%	<u>11%</u>
Age/too old/health	3%	4%	2%	2%	1%	--	<1%	<1%	<u>8%</u>
Not accessible for the handicapped	1%	1%	1%	1%	1%	1%	<1%	1%	<u>3%</u>
Other Justifications (Net)	11%	9%	11%	10%	9%	10%	9%	10%	14%
Crowds/people/noise	5%	3%	6%	4%	4%	4%	4%	4%	7%
Not comfortable	3%	3%	3%	4%	3%	3%	2%	4%	2%
Quality	2%	2%	2%	2%	2%	2%	2%	2%	2%
Need people to go with	1%	1%	1%	1%	1%	<u>3%</u>	1%	<1%	<u>3%</u>
Other	6%	<u>9%</u>	5%	6%	5%	8%	6%	5%	6%

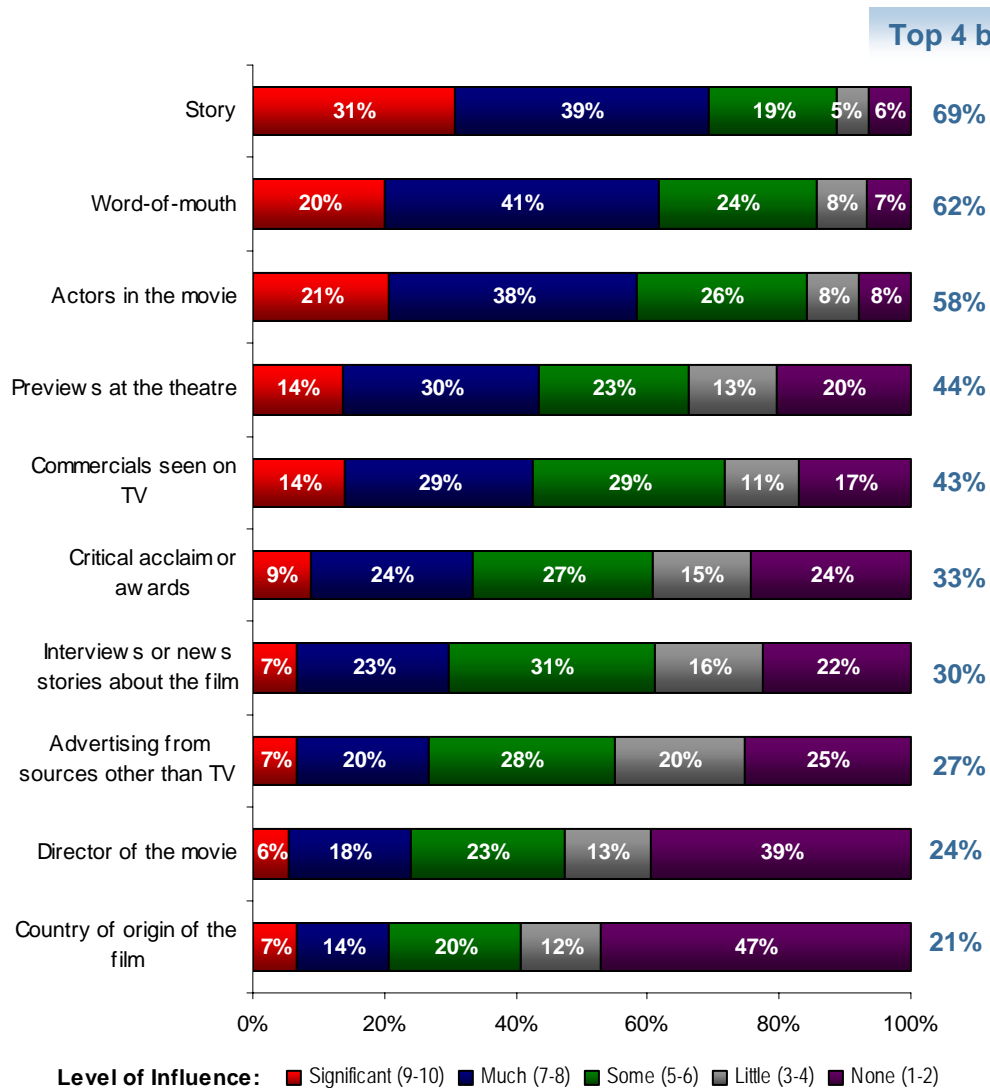
Question: A2. What factors influence your decision NOT to attend more movies at the movie theatre?

Base: Respondents who attend the movie theatre weekly or less frequently (n=1,980)

Note: Frequencies identified in underlined, bolded, italicized text are those values significantly higher than those in another segment of the population.

Respondents give similar reasons influencing their decision not to attend more movies at the theatre in 2005 when compared to 1998 results, although "price" seems to have grown in importance over the years. The top three results in 1998 were: "too expensive" (30%), "no time" (19%), and "don't like what's playing" (17%).

Factors that Influence Movie Selection at the Theatre



Question: A3. Rate the level of influence each of the following have on selecting a movie at the theatre.
 Base: Watch movies at the theatre (n=1,660)

- Respondents were asked to rate the extent to which a series of factors might influence their movie selection at the theatre. To express the level of influence each factor has on movie selection, respondents used a scale of 1 to 10, where a 1 represents “No influence” and a 10 represents “Significant influence”.
- Results suggest that the storyline has the largest influence, with 69% of respondents claiming it has much or significant influence (i.e. a score of at least 7 on a 10-point scale). Secondary factors include word-of-mouth (62%) and the actors starring in the movie (58%). Factors deemed to have the lowest levels of influence include advertising from sources other than television (27%), the director of the movie (24%) and the country of origin of the film (21%).

In the 1998 study conducted for PCH, respondents gave the same top three factors that influence their movie selection at the movie theatre: word-of-mouth (29%), the story (26%), and the starring actors (13%). It is important to note that the question in 1998 was an open-ended question.

Factors that Influence Movie Selection at the Theatre

- Quebec residents who go to the movies are more likely to feel they are influenced than the rest of Canada by the actors in the movie (63% vs. 57% give a rating of at least 7 on a 10-point scale), critical acclaim or awards (42% vs. 30%), interviews or news stories about the film (36% vs. 28%), the director (32% vs. 21%) and the country of origin (29% vs. 18%). Respondents in the rest of Canada tend to more often choose a movie because of the story (73%) when compared to Quebec residents (57%).
- Results also suggest that when compared to men, women who go to the movies are more likely to be influenced by the story, by word-of-mouth, by the starring actors, the previews, commercials, critical acclaim, interviews about the film, and advertising (see table below for details). Men are more likely than women be influenced by the director of the movie (27% vs. 22%).
- Looking at age groups, older respondents who go to the movies are more likely to be influenced by critical acclaim or awards and the country of origin whereas younger Canadians are more likely to be influenced by advertising and previews.

Level of Influence on Movie Selection at a Theatre (Top 4 Box Summary)	Overall	Quebec	Rest of Canada	Men	Women	15-20	21-34	35-54	55+
Story	69%	57%	73%	66%	73%	69%	76%	69%	62%
Word-of-mouth	62%	58%	63%	55%	67%	63%	66%	62%	55%
Actors in the movie	58%	63%	57%	54%	62%	56%	59%	61%	53%
Previews at the theatre	44%	44%	43%	40%	46%	62%	57%	41%	20%
Commercials seen on TV	43%	41%	43%	37%	48%	58%	55%	41%	21%
Critical acclaim or awards	33%	42%	30%	30%	36%	27%	30%	35%	38%
Interviews or news stories about the film	30%	36%	28%	26%	34%	28%	27%	33%	29%
Advertising from sources other than TV	27%	30%	26%	23%	30%	34%	24%	24%	30%
Director of the movie	24%	32%	21%	27%	22%	20%	24%	26%	23%
Country of origin of the film	21%	29%	18%	19%	22%	18%	19%	20%	27%

Question: A3. Rate the level of influence each of the following have on selecting a movie at the theatre.
Base: Watch movies at the theatre (n=1,660)

Factors that Influence Movie Selection at the Theatre

- In order to get a better understanding of the factors that may affect moviegoers, respondents were split into two groups: those who attend the movie theatres and drive-ins less than monthly, and those who attend more frequently. Generally, results are very consistent between these two segments. Results do show however that more frequent moviegoers are more likely to consider previews at the theatre as a significant source of influence.
- Respondents were also grouped as low, medium and high, based on the number of Canadian films featured in the survey that they have seen (2 or less, 3 to 4, and 5 or more, respectively). Respondents with low exposure are more influenced by the storyline (70%, vs. 64% among those with medium exposure). Respondents with high exposure to Canadian film are most influenced by the actors in the movie (69%, vs. 56% among those with lower exposure), interviews or news stories about the film (37%, vs. 29% with lower exposure), the director of the movie (36%, vs. 21% among those with lower exposure), and the country of origin of the film (30%, vs. 18% among those with lower exposure to Canadian film).

Influence on Movie Selection at the Theatre (Top 4 Box Summary)	Theatre Attendance			Exposure to Canadian Film		
	Overall	Less than monthly	Monthly or more	Low (<3)	Medium (3-4)	High (5+)
Story	69%	69%	71%	<u>70%</u>	64%	65%
Word-of-mouth	62%	62%	61%	62%	57%	63%
Actors in the movie	58%	58%	59%	57%	55%	<u>69%</u>
Previews at the theatre	44%	37%	<u>56%</u>	44%	44%	<u>51%</u>
Commercials seen on TV	43%	41%	45%	45%	43%	42%
Critical acclaim or awards	33%	33%	35%	30%	<u>36%</u>	<u>42%</u>
Interviews or news stories about the film	30%	29%	32%	30%	27%	<u>37%</u>
Advertising from sources other than TV	27%	25%	30%	27%	24%	<u>31%</u>
Director of the movie	24%	23%	27%	20%	<u>26%</u>	<u>36%</u>
Country of origin of the film	21%	20%	22%	18%	20%	<u>30%</u>

Question: A3. Rate the level of influence each of the following have on selecting a movie at the theatre.

"Less than monthly attendance" and "Monthly attendance or more" are defined based on response in A1a. How often do you watch movies in a theatre or a drive-in? "Low exposure" to Canadian feature film describes a respondent who has seen 2 or less of the Canadian feature films featured in the survey, "Medium exposure" are those who have seen 3 or 4 of the movies, and "High exposure" are those who have seen 5 or more of the films.

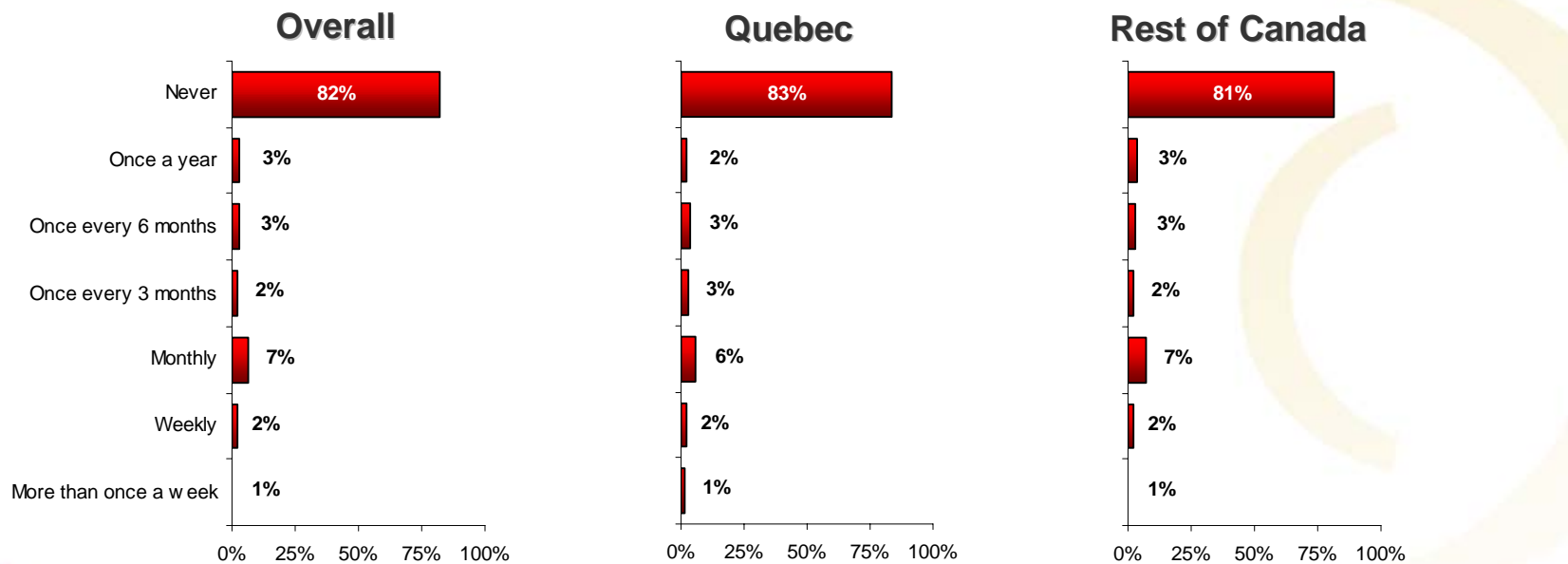
Base: Watch movies at the theatre (n=1,660)

Note: Frequencies identified in underlined, bolded, italicized text are those values significantly higher than those in another segment of the population.

Using a Video-on-Demand Service

- Video-on-demand (VOD) is still a relatively new service in Canada. This explains why still 82% of Canadians have never used a VOD service. Results in Quebec are very similar to those living in the rest of Canada.
- These results are in fact somewhat high for VOD. Other research conducted by Decima would suggest that the use of VOD is closer to 4% to 6% among all Canadian households. We can hypothesize that Canadians may not completely understand VOD specifically and that many may be confusing it with pay-per-view services, and even traditional video rental services. As such, these results should be used with some caution.

Although pay-per-view is not the same as VOD, it is still the movie-ordering concept that most resembles VOD. To give some perspective to the VOD results on this page, we can consider some recent results from an Ipsos survey in the US. Results there show that 37% of Americans claim to have ordered a movie on a pay-per-view station at one point or another.

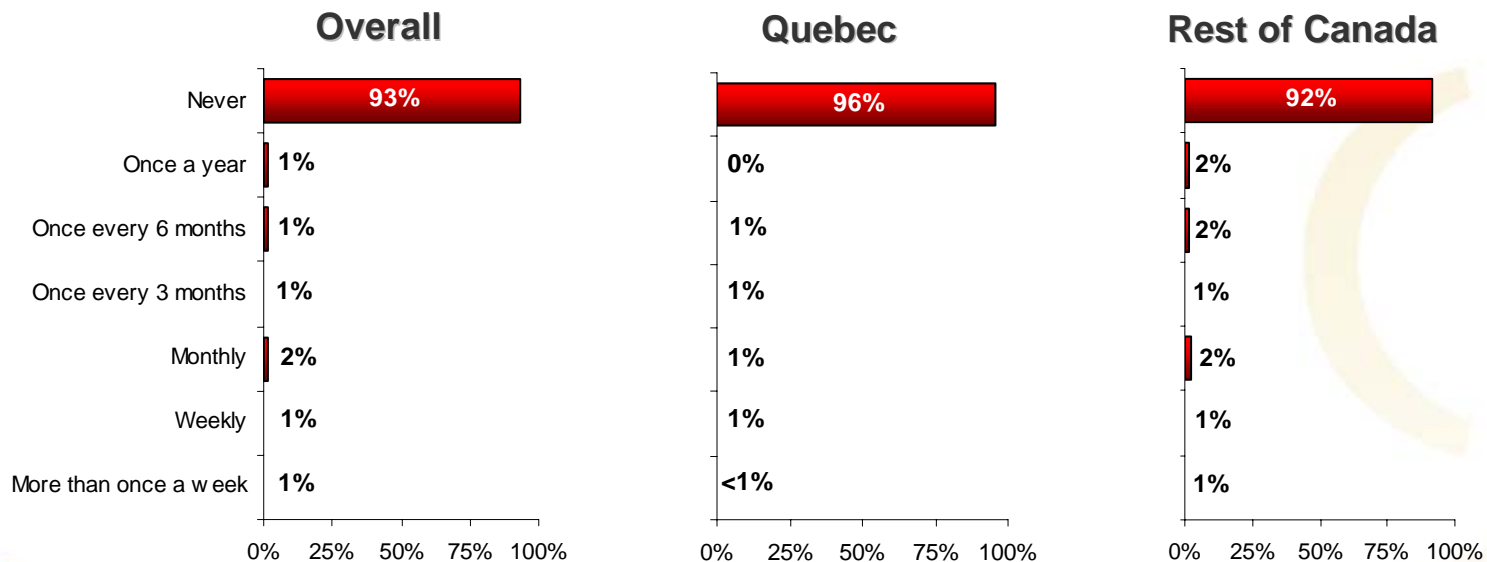


Question: A1f. How often do you use a video-on-demand service?
Base: All respondents (n=2002)

Downloading and Watching Movies from the Internet

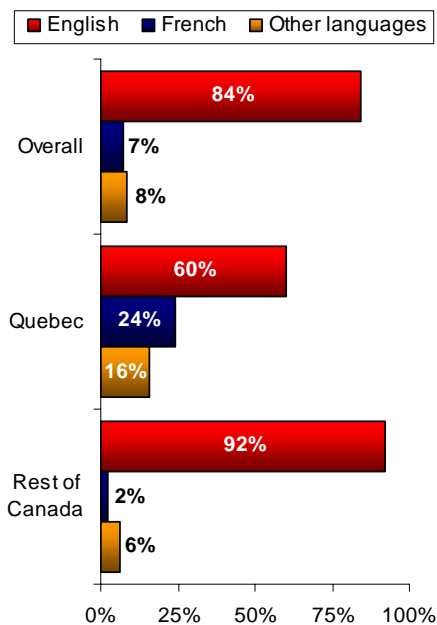
- Another relatively new movie-watching alternative involves downloading the movie from the Internet (which is distinct from video streaming). The vast majority of Canadians (93%) never download movies. Only 5% of Canadians download movies at least once every 3 months. There are no true differences between the provinces.

These results are relatively consistent with those obtained by Ipsos in their recent survey of Americans where 5% of respondents claim to have used the Internet to download a movie onto a computer, at one point or another.

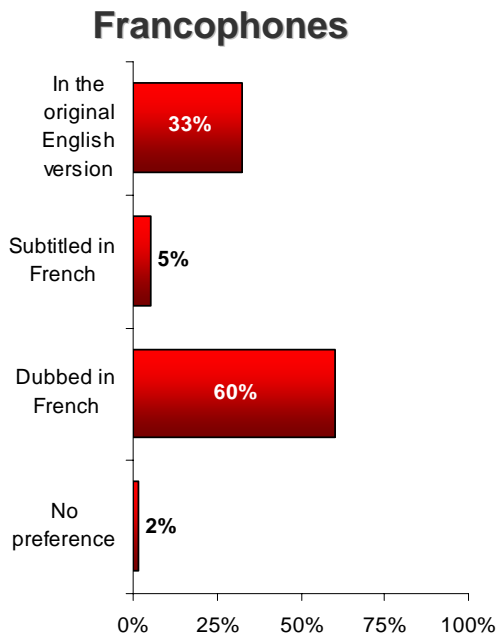


Movie Language Preferences

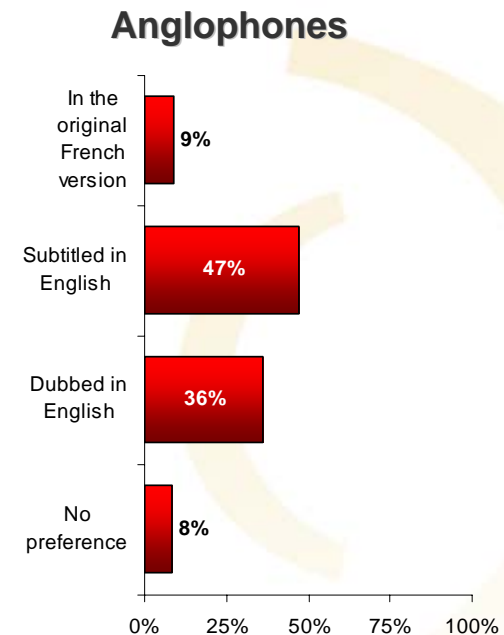
- Respondents were asked to estimate the percentage of movies watched in English, French, or in other languages. Overall, 84% of movies watched are in English, 7% are in French, and 8% are in other languages. Predictably, a greater proportion of movies watched among Quebec residents are in French (24%) compared to the rest of Canada (2%). An important proportion of movies watched in Quebec are also in another language (16%), also significantly higher than the equivalent proportion among respondents from the rest of Canada (6%).
- A plurality of Anglophones would prefer English subtitles (47%) when watching a movie originally produced in French, and 36% would prefer a dubbed version. Only 9% of English respondents state that they would watch a French movie in the original French version. Among Francophones, the majority would prefer a dubbed version (60%) when watching a movie originally produced in English while one-third would prefer to watch the movie in the original English version. Francophones do not enjoy subtitles nearly as much as Anglophones.



Question: A12a. Percentage of movies watched in these languages?
Base: A1a-h. Watches movies at least once per year (n=1934)



Question: A12bi. Prefer to watch English movies...
Base: A1a-h. Watches movies at least once per year AND Francophones (n=689)

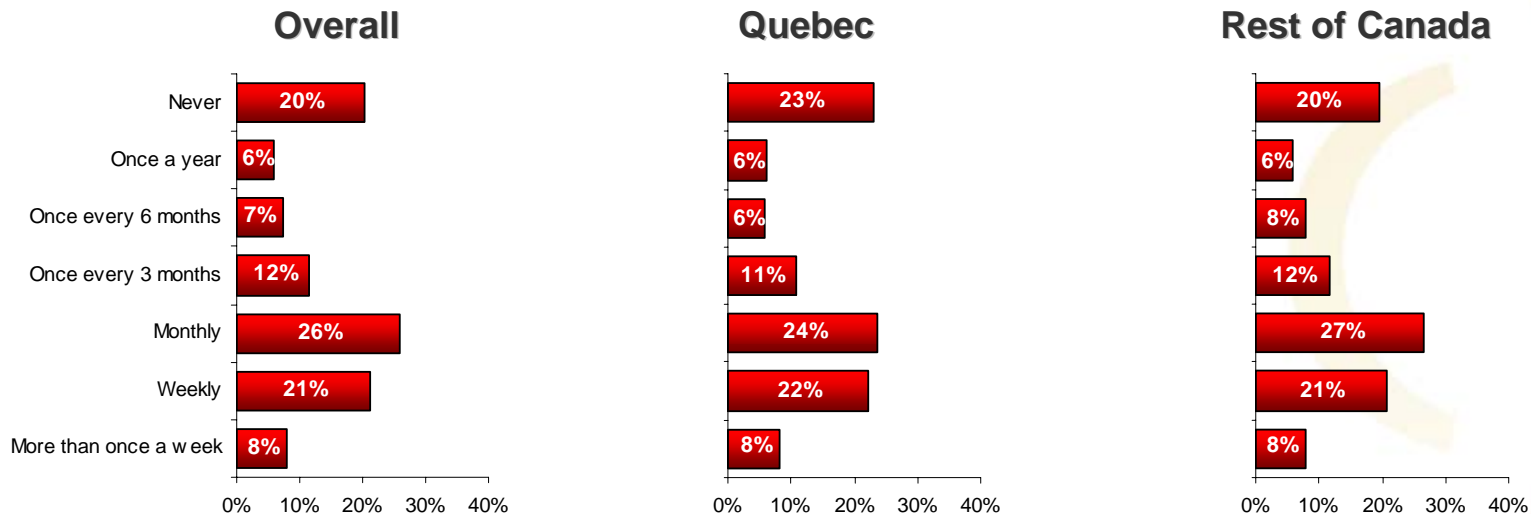


Question: A12bii. Prefer to watch French movies...
Base: A1a-h. Watches movies at least once per year AND Anglophones (n=1,296)

Renting and Buying Movies

Renting Movies

- Two-thirds (67%) of Canadians rent movies at least once every three months. Within this group, 8% rent more than once a week, 21% rent weekly, 26% rent monthly and 12% rent once every three months. Twenty percent of Canadians never rent movies.
- While there are no significant differences between Quebec and the rest of Canada, there are notable differences based on whether or not the respondent lives in an urban region rather than in a rural region. Urban residents are more likely to rent movies at least once a week (30%) as compared to rural residents (22%).
- Results also show that there is a strong relationship between renting movies and age and household income (as previously noted on slide 17):
 - While about half of Canadians between 15 and 34 years old rent movies at least once per week, this drops to 29% among those in the next age bracket (35 to 54) and even lower among those over 55 years old (6%).
 - Households with annual incomes under \$40,000 rarely rent movies, with 39% stating they rent movies once per year or never. This compares to 12% among households earning over \$80,000 annually.



Question: A1b. How often do you rent movies?
 Base: All respondents (n=2002)

Factors Having an Impact on Movie Rental Selection

- Respondents were asked to identify the factors that have an impact on their movie rental selection. Over half of the respondents (51%) indicated that the **content** of the movie was an important factor when selecting movies to rent. This includes the movie story (26%), the overall genre or type of movie (14%), and the picture and description of the movie on the rental box (7%).
- Secondary reasons impacting movie rental selection are **general awareness** of the movie (38%), which includes hearing about the movie through **word-of-mouth** and through various **advertising**. Thirty-three percent of respondents give reasons pertaining to **distinction, which includes the actors starring in the movie** and **critical acclaim or awards for the movie**.
- Other reasons influencing movie rental selection are the **availability of the movies in the store (10%)**, along with **renting movies for family members (4%)**, in particular the children.
- Quebec residents are more likely to consider the content of the movie to be a major factor (56% vs. 49% among the rest of Canada). Younger Canadians (15 to 34) are more likely than older Canadians to consider the information and picture on the rental box an important contributor (about 11% vs. 4% for older respondents).
- Awareness of the movie (including hearing about the movie through word-of-mouth and through advertising) is more likely to have an impact on women (42% vs. 34% for men).

Factors Having an Impact on Movie Rental Selection

Reason to Rent Movie	Overall	Rest of							
		Quebec	Canada	Men	Women	15-20	21-34	35-54	55+
Content (Net)	51%	<u>56%</u>	<u>49%</u>	<u>51%</u>	<u>50%</u>	<u>50%</u>	<u>48%</u>	<u>52%</u>	<u>52%</u>
Story	26%	26%	26%	25%	27%	20%	25%	<u>28%</u>	28%
Genre/type of movie	14%	<u>18%</u>	13%	15%	14%	15%	11%	14%	19%
Picture/blurb on box	7%	<u>12%</u>	5%	6%	8%	<u>13%</u>	<u>9%</u>	5%	3%
Interest me/looks good	5%	4%	6%	<u>7%</u>	4%	4%	6%	5%	6%
Content of the movie	5%	<u>7%</u>	4%	4%	5%	3%	3%	5%	7%
Having seen it before and liked it	2%	1%	2%	<u>3%</u>	1%	1%	2%	1%	3%
Special FX	1%	2%	1%	2%	<1%	--	1%	1%	2%
Awareness (Net)	38%	36%	39%	34%	<u>42%</u>	41%	39%	38%	35%
Word-of-mouth	27%	25%	28%	23%	<u>31%</u>	<u>33%</u>	29%	25%	27%
Advertising	9%	9%	9%	7%	<u>11%</u>	8%	8%	9%	11%
Previews at the theatre	6%	5%	6%	6%	6%	8%	7%	6%	3%
Commercials seen on TV	4%	3%	5%	4%	5%	4%	6%	4%	4%
Interviews or news stories	3%	4%	3%	4%	3%	<1%	2%	5%	<u>3%</u>
Popular	1%	2%	1%	2%	1%	1%	1%	2%	2%
Distinction (Net)	33%	<u>40%</u>	32%	32%	35%	27%	<u>37%</u>	<u>35%</u>	30%
Actors in the movie	23%	27%	22%	22%	25%	21%	26%	24%	21%
Critical acclaim or awards	12%	13%	12%	11%	14%	7%	<u>14%</u>	<u>14%</u>	8%
Director of the movie	6%	9%	6%	<u>8%</u>	5%	2%	<u>6%</u>	<u>8%</u>	<u>7%</u>
Country of origin	3%	4%	3%	3%	2%	<1%	<u>3%</u>	<u>3%</u>	<u>4%</u>
Store availability (Net)	10%	7%	<u>11%</u>	10%	10%	7%	<u>12%</u>	<u>11%</u>	5%
On the 'new release' shelf	5%	5%	5%	5%	5%	3%	<u>7%</u>	<u>6%</u>	2%
Availability/selection	5%	2%	<u>6%</u>	5%	4%	4%	5%	5%	3%
Family (Net)	4%	2%	<u>5%</u>	4%	5%	<1%	1%	<u>8%</u>	4%
The kids wanted the movie	3%	1%	<u>4%</u>	3%	4%	<1%	1%	<u>5%</u>	4%
Family movie	1%	<1%	2%	1%	1%	--	0%	3%	--
Other (Net)	20%	15%	<u>21%</u>	21%	19%	17%	21%	20%	20%
Mood	6%	5%	7%	5%	<u>8%</u>	5%	6%	7%	5%
Didn't see in theatre	3%	2%	<u>4%</u>	3%	3%	3%	5%	2%	3%
Cost	1%	<1%	<u>1%</u>	1%	<1%	2%	1%	<1%	1%
Whether I have seen or not	1%	--	1%	1%	1%	<1%	1%	1%	--
Other	10%	8%	11%	<u>12%</u>	8%	9%	9%	10%	13%

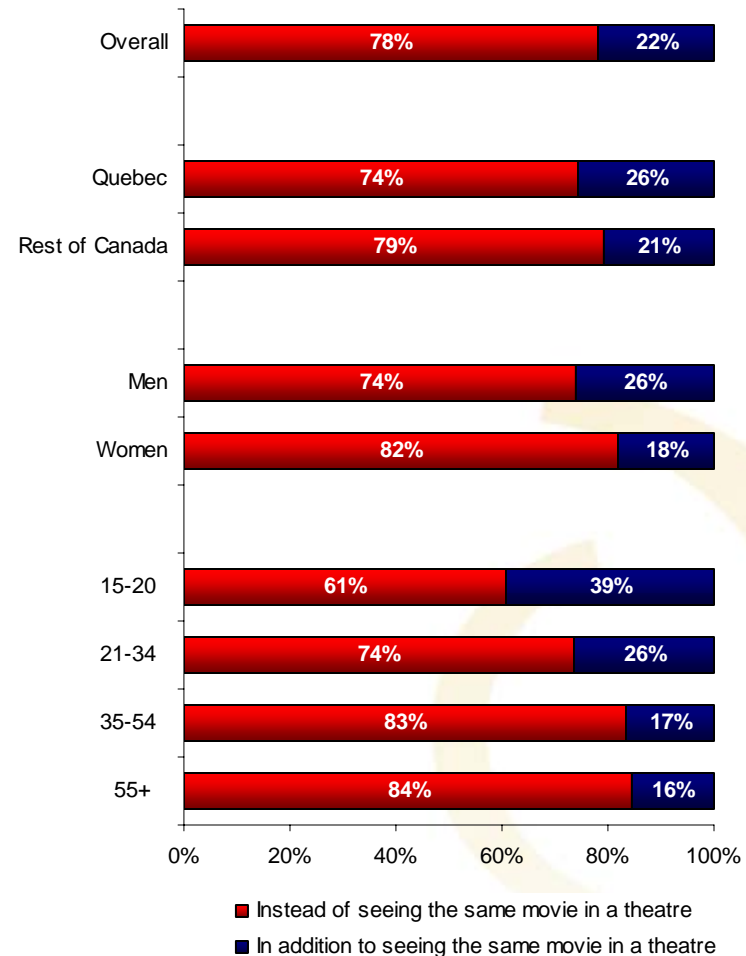
Question: A4. What affects your choice when deciding which movies to rent?

Base: A1b. Rent movies (n=1,628)

Note: Frequencies identified in underlined, bolded, italicized text are those values significantly higher than those in another segment of the population.

Renting Movies Versus Going to a Movie Theatre

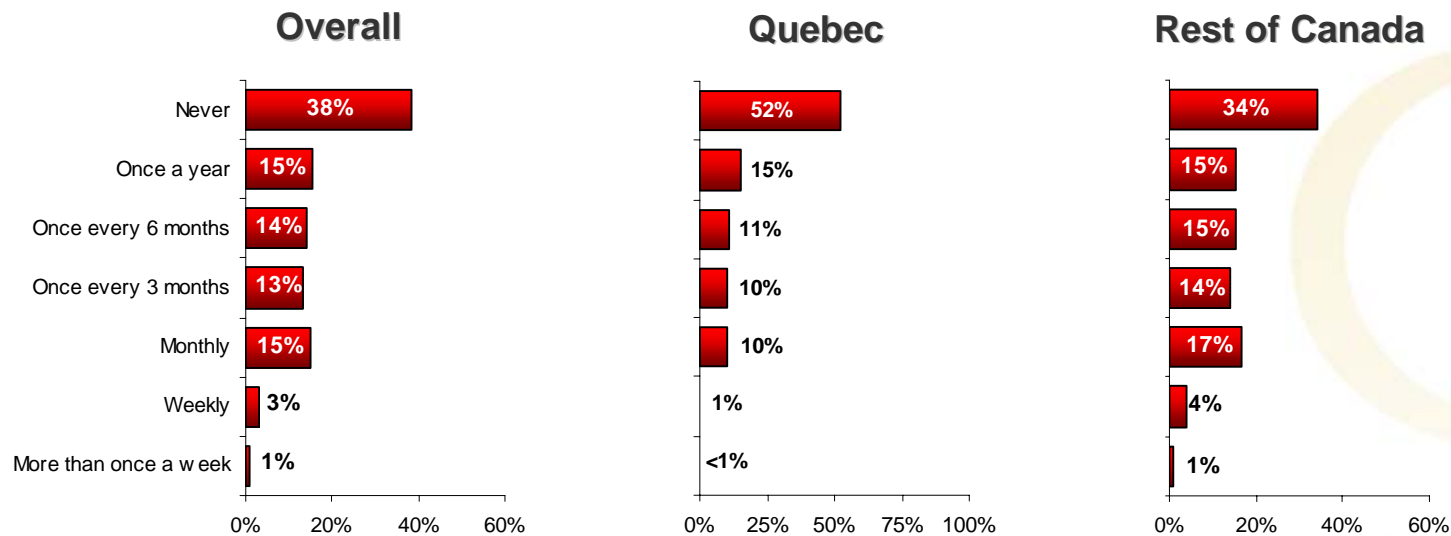
- “Movie renters” were asked if they rented movies instead of seeing the same movies in the theatre or if they rented in addition to seeing the same movies in the theatre. Seventy-eight percent of Canadians rent movies *instead* of seeing them in a theatre. Quebec residents are significantly more likely to rent them in addition to seeing movies in the theatre (26%) compared to residents in the rest of Canada (21%).
- Eighty-two percent of women compared to 74% of men rent movies instead of seeing them in the theatre.
- Younger respondents, in particular those aged 15 to 20, are more likely to rent movies in addition to seeing them in the theatre.



Question: A5. Most often you rent a movie...
Base: A1b. Rent movies (n=1,628)

Buying Movies

- Respondents were asked how often they bought movies. Results show that this is an activity more likely to be undertaken a few times a year. More specifically, only 4% buy movies at least once per week and 15% buy movies monthly. Similar proportions buy movies once every three months, twice a year and once per year. About 2 in 5 Canadians do not purchase movies. It is important to note here that while these results speak to the frequency of purchase, they do not give any insight into volume. In other words, these results show that Canadians do not purchase movies often. However, Canadians could nonetheless purchase any number of movies when they actually do go shopping.
- Results also show that Quebec residents are less likely to buy movies, with 52% indicating that they never buy movies, compared to 34% among residents in the rest of Canada. Among other more specific regions outside Quebec, British Columbia (42%) and Atlantic Canada (41%) also show low levels of movie purchase.
- Younger Canadians seem to buy movies more often when compared to their older counterparts. Almost one-third of 15 to 34 year olds buy movies at least once a month compared to only 6% among respondents over 55 years of age.



Factors Having an Impact on Movie Purchases

- Respondents were asked to identify the factors that have the most impact on their movie purchase decisions. Close to half of the respondents (45%) are self-proclaimed **movie fans**, an intuitive reason impacting movie purchases. This includes **liking the movie so much that they want to own it (44%)**, being a movie collector (2%), and wanting to have the option of watching the movie more than once (2%).
- Secondary reasons impacting movie purchases are **the content of the movie (30%)**, which includes what the story is about and the type of film. Twenty-one percent of respondents consider factors relating to **distinction (21%)**, which includes **the actors starring in the movie (12%)** and **critical acclaim or awards (5%)**.
- Other reasons influencing decisions to purchase movies include **general awareness of the movie (18%)**, **cost (14%)**, and if **family members, usually the kids, want the movie (8%)**.
- Canadians aged 15 to 20 are most likely to purchase a movie based on the fact that they liked the movie so much they wanted to own it, whereas older respondents are more likely to own a movie because of the story or the genre of the movie. Older respondents, especially those between 21 and 54, are also more likely to indicate that the family has a say in the decision to purchase a movie.
- Women and Canadians between 15 and 20 are more likely to indicate that word-of-mouth influences their decision on which movies they purchase.

Factors Having an Impact on Movie Purchases

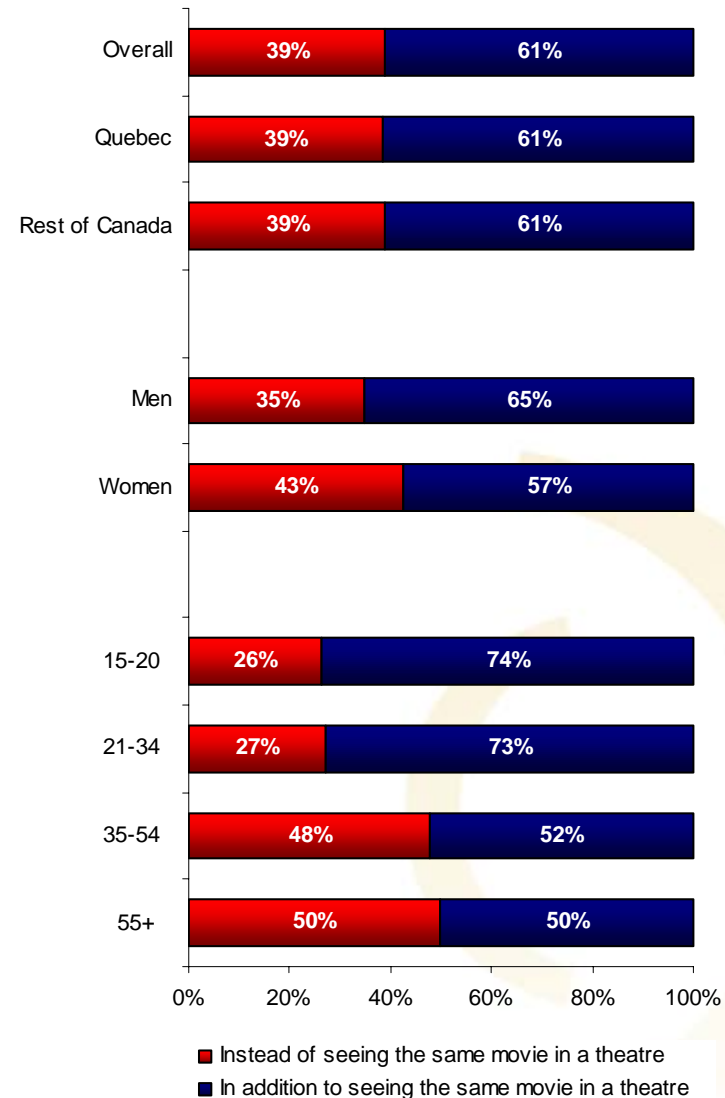
Reason to Buy Movie	Overall	Rest of							
		Quebec	Canada	Men	Women	15-20	21-34	35-54	55+
Movie Enthusiast (Net)	45%	47%	44%	44%	46%	55%	55%	39%	34%
I like the movie so much I want to own it	44%	46%	43%	43%	44%	55%	54%	38%	33%
I am a movie collector	2%	1%	<u>3%</u>	1%	4%	0%	2%	2%	4%
Want to watch it more than once	2%	1%	<u>3%</u>	1%	4%	0%	2%	2%	4%
Content (Net)	30%	27%	31%	33%	28%	21%	27%	32%	38%
Story	14%	13%	14%	15%	13%	7%	<u>16%</u>	13%	<u>20%</u>
Genre/type of movie	8%	6%	9%	9%	7%	6%	5%	9%	12%
Content of the movie	6%	3%	<u>7%</u>	<u>8%</u>	4%	3%	4%	<u>8%</u>	6%
Interest me/looks good	4%	3%	4%	4%	3%	2%	3%	4%	5%
Picture/blurb on box	2%	<u>5%</u>	1%	2%	2%	3%	2%	1%	2%
Special FX	1%	<1%	1%	2%	1%	<1%	1%	2%	--
Distinction (Net)	21%	24%	20%	20%	22%	20%	16%	24%	24%
Actors in the movie	12%	12%	11%	10%	13%	12%	11%	10%	15%
Critical acclaim or awards	5%	5%	6%	5%	6%	8%	4%	6%	6%
Classic/old movie	4%	5%	4%	5%	4%	1%	1%	<u>8%</u>	3%
Director of the movie	2%	2%	2%	3%	1%	<1%	<u>2%</u>	<u>2%</u>	3%
Country of origin	1%	3%	1%	1%	1%	<1%	1%	<u>2%</u>	2%
Awareness (Net)	18%	14%	19%	14%	21%	27%	16%	16%	21%
Word-of-mouth	13%	9%	<u>14%</u>	9%	<u>16%</u>	<u>19%</u>	12%	10%	17%
Advertising	3%	2%	<u>4%</u>	2%	4%	4%	4%	3%	4%
Commercials seen on TV	2%	2%	2%	3%	2%	1%	2%	2%	6%
Previews at the theatre	2%	1%	3%	2%	3%	<u>5%</u>	3%	2%	1%
Popular	1%	2%	1%	1%	1%	1%	1%	1%	1%
Interviews or news stories	1%	1%	1%	1%	1%	1%	--	1%	3%
Cost	14%	9%	15%	15%	13%	14%	16%	16%	6%
Family (Net)	8%	7%	9%	5%	11%	1%	9%	12%	6%
The kids wanted the movie	7%	7%	7%	5%	9%	<1%	7%	10%	6%
Family movie	1%	<1%	2%	1%	<u>2%</u>	<1%	1%	2%	<1%
Other (Net)	9%	9%	9%	9%	9%	6%	7%	9%	16%
Mood	1%	<1%	1%	<u>1%</u>	1%	<1%	1%	2%	1%
Availability/selection	1%	<1%	1%	1%	<1%	--	1%	1%	1%
Didn't get to see in theatre	1%	2%	<1%	1%	1%	<1%	1%	1%	1%
New release/recent movie	<1%	1%	<1%	<1%	<1%	1%	<1%	<1%	1%
Whether I have seen it or not	<1%	--	<1%	<1%	--	--	1%	--	--
Other	6%	6%	6%	6%	6%	4%	4%	5%	<u>12%</u>

Question: A6. What affects your choice when deciding which movies to purchase?
Base: A1c. Buy movies (n=1,227)

Note: Frequencies identified in underlined, bolded, italicized text are those values significantly higher than those in another segment of the population.

Buying Movies Versus Going to a Movie Theatre

- “Movie buyers” were asked if they bought movies instead of or in addition to seeing the same movies in the theatre. Results are significantly different compared to responses provided by “movie renters.” Sixty-one percent of Canadians buy movies in addition to seeing the same movies in the theatre. There are no differences seen between Quebec and the rest of Canada.
- Women (43%) are more likely than men (35%) to buy movies instead of seeing them in the theatre.
- Urban residents (64%) are more likely than rural residents (53%) to buy movies in addition to seeing the same movies in the theatre.
- As was the case with “movie renters,” younger Canadians are more likely to purchase movies they have already seen in a theatre compared to older Canadians.

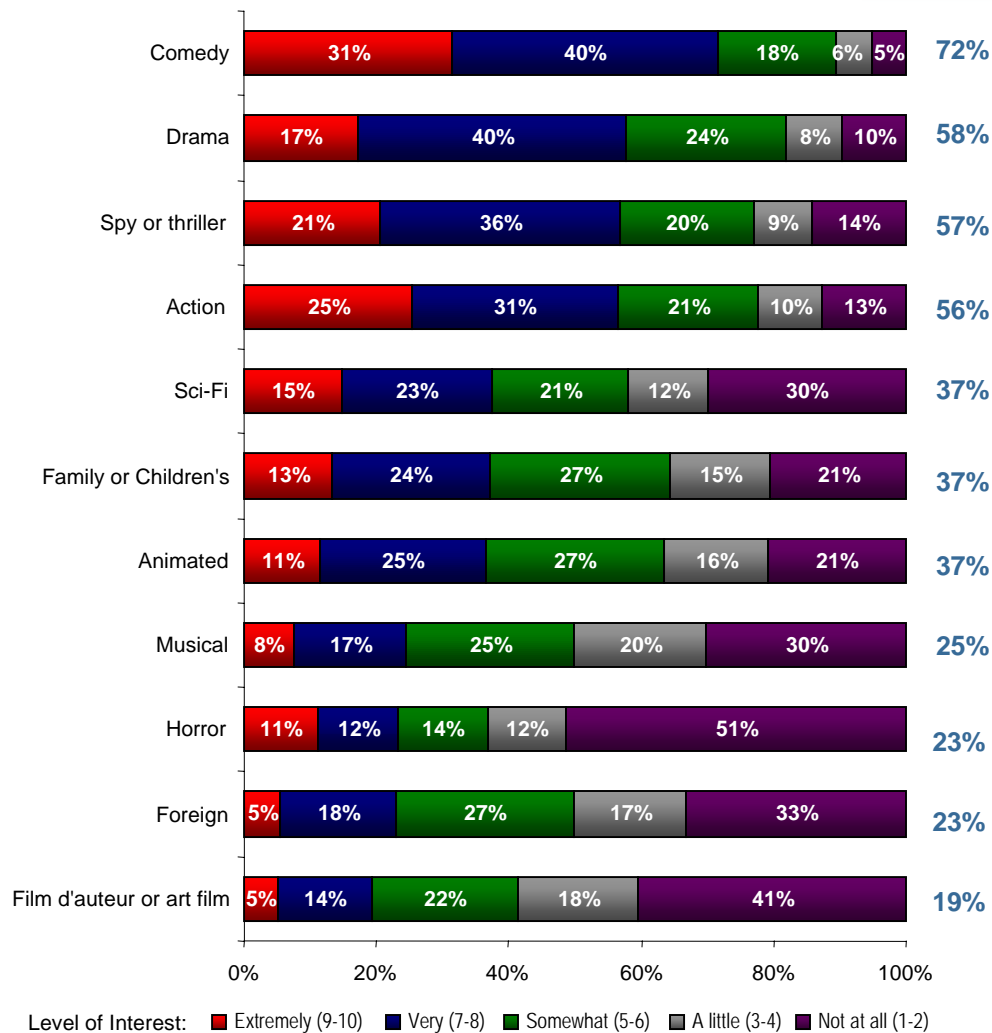


Question: A7. Most often you buy a movie...
Base: A1c. Rent movies (n=1,227)

Movie Genres

Level of Interest in Types of Movies

Top 4 box



These research results might help us to understand why James Bond might be popular in Canada – he stars in spy movies filled with action and peppered with comic relief. These ingredients also represent some of the most popular movie genres among Canadians. Comedies are preferred (72% of respondents stated a high degree of interest, in other words a score of 7 or higher on a 10-point scale), followed by dramas (58%), spy or thrillers (57%) and action films (56%).

- Just over one-third of Canadians show high interest in Sci-Fi movies, family or children's movies and animated movies (all with 37% of respondents with a score of at least 7 on a 10-point scale).
- Least favourite among Canadians are musicals (25%), horrors (23%), foreign films (23%) and art films (19%).

The top three movie genre preferences of the Canadian population have shifted somewhat since 1998. Comedies and dramas remain up top in 2005, and now spy or thriller movies have inched their way forward ahead of action films. A recent 2005 Ipsos study among Americans shows similar results, with the top three genre preferences being comedy, drama, and action/adventure films.

Level of Interest: ■ Extremely (9-10) ■ Very (7-8) ■ Somewhat (5-6) ■ A little (3-4) ■ Not at all (1-2)

Question: A8. Please state your level of interest in the following types of movies.
Base: All respondents (n=2002)

Level of Interest in Types of Movies

- There are several differences in movie genre preferences between residents of Quebec and the rest of Canada. While respondents in the rest of Canada are more likely to be interested in comedies (73% vs. 66% give a rating of at least 7 out of 10) and dramas (59% vs. 54%), Quebec residents are more likely to be interested in Sci-Fi films (43% vs. 36%), foreign films (34% vs. 20%) and in films d'auteur or art films (29% vs. 16%).
- Comparing men and women, men are more likely to be interested in action (64% vs. 49%), spy or thrillers (63% vs. 51%) and Sci-Fi films (48% vs. 27%), whereas women are more likely to prefer dramas (68% vs. 46%), family or children's movies (47% vs. 27%) and musicals (32% vs. 17%).
- Looking at age groups, many differences in interest levels exist. Please refer to the table below for more specific details.

Level of Interest in Movie Genre (Top 4 Box Summary)	Overall	Quebec	Rest of Canada	Men	Women	15-20	21-34	35-54	55+
Comedy	72%	66%	73%	70%	73%	88%	82%	74%	53%
Drama	58%	54%	59%	46%	68%	50%	63%	64%	47%
Spy or thriller	57%	60%	56%	63%	51%	63%	67%	64%	36%
Action	56%	59%	56%	64%	49%	75%	66%	63%	31%
Sci-Fi	37%	43%	36%	48%	27%	43%	47%	44%	17%
Family or Children's	37%	39%	36%	27%	47%	18%	39%	43%	34%
Animated	37%	39%	36%	34%	39%	38%	51%	41%	18%
Musical	25%	27%	24%	17%	32%	17%	15%	21%	40%
Horror	23%	23%	24%	24%	23%	61%	34%	19%	6%
Foreign film	23%	34%	20%	23%	23%	25%	26%	24%	19%
Film d'auteur or art film	19%	29%	16%	18%	20%	18%	19%	19%	20%

Question: A8. Please state your level of interest in the following types of movies.
Base: All respondents (n=2002)

Level of Interest in Types of Movies

- Comparisons made based on frequency of movie theatre attendance shows several differences in movie genre preference. Those attending less often are more likely to prefer family or children’s movies (40%, vs. 30% among more frequent moviegoers), suggesting that the less frequent attendees are those who are likely to be at home with children and may find it more difficult to find time to go to the theatre. Frequent moviegoers are more likely to prefer most of the movie genres, including comedies (81% vs. 68%), spy or thrillers (67% vs. 53%), action films (66% vs. 53%), and horrors (35% vs. 19%).
- A similar trend is seen when comparing those with varying degrees of exposure to Canadian film. Respondents with medium to high exposure are more likely to be interested in spy or thrillers, action films, animated movies, Sci-Fi, horrors, foreign and art films. Please see chart below for more specific details.

Level of Interest in Movie Genre (Top 4 Box Summary)	Theatre Attendance			Exposure to Canadian Film		
	Overall	Less than monthly	Monthly or more	Low (<3)	Medium (3-4)	High (5+)
Comedy	72%	68%	81%	71%	75%	74%
Drama	58%	55%	64%	56%	56%	61%
Spy or thriller	57%	53%	67%	53%	62%	71%
Action	56%	53%	66%	56%	66%	67%
Animated	37%	34%	43%	34%	41%	44%
Family or Children's	37%	40%	30%	37%	33%	39%
Sci-Fi	37%	34%	46%	33%	48%	51%
Musical	25%	25%	24%	23%	22%	26%
Horror	23%	19%	35%	24%	31%	30%
Foreign film	23%	20%	32%	17%	30%	39%
Film d'auteur or art film	19%	17%	25%	13%	27%	34%

Question: A8. Please state your level of interest in the following types of movies.
 Base: All respondents (n=2002)

Awareness and Viewership of Canadian Feature Films

Awareness of Canadian Feature Film

- A list of movies was included in the questionnaire in order to gauge awareness of Canadian films. There is a significant difference between Quebec and the rest of Canada across all movies, which is in large part attributable to the language in which the movie was produced. Generally, Quebec residents are much more aware of French language movies than those residing in the rest of Canada are aware of the English language movies.
- Overall, the movies that garnered the highest levels of awareness are English movies: Men with Brooms, Mambo Italiano and Resident Evil, each with 57% of Canadians aware of these movies.
- The top three movies in Quebec in terms of awareness are: Les Invasions barbares (91%), Séraphin (90%) and La Grande séduction (85%).
- As the table below shows, there are numerous significant differences worth noting between genders and between age groups.

Have you HEARD of the movie... (% "Yes")	Overall	Quebec	Rest of Canada	Men	Women	15-20	21-34	35-54	55+
Men with Brooms (Eng.)	57%	25%	68%	61%	54%	68%	68%	59%	43%
Mambo Italiano (Eng.)	57%	80%	49%	56%	57%	59%	69%	60%	41%
Resident Evil: Apocalypse (Eng.)	57%	50%	59%	62%	52%	85%	81%	59%	23%
Les Invasions barbares (Fr.)	48%	91%	33%	51%	45%	38%	47%	51%	48%
Being Julia (Eng.)	47%	27%	54%	41%	53%	34%	46%	54%	43%
Going the Distance (Eng.)	47%	34%	52%	49%	46%	64%	51%	47%	38%
Bollywood Hollywood (Eng.)	46%	21%	54%	48%	43%	36%	49%	50%	41%
Ginger Snaps (Eng.)	35%	23%	38%	39%	30%	63%	52%	31%	14%
La Grande séduction (Fr.)	33%	85%	16%	35%	31%	32%	35%	35%	29%
Le Papillon bleu (Fr.)	33%	79%	17%	29%	36%	30%	34%	34%	30%
Séraphin : Un homme et son péché (Fr.)	32%	90%	12%	32%	31%	25%	31%	35%	29%
The Corporation (Eng.)	31%	20%	35%	37%	26%	19%	32%	35%	32%
Les Boys III (Fr.)	29%	84%	10%	31%	26%	25%	32%	31%	24%
Elvis Gratton XXX: La Vengeance d'Elvis Wong (Fr.)	27%	82%	9%	28%	26%	28%	29%	25%	26%
Ryan (Eng.) ⁺	26%	32%	25%	24%	29%	12%	21%	27%	35%
Ma vie en cinémascope (Fr.) [*]	20%	67%	5%	20%	20%	17%	21%	23%	18%
20h17 rue Darling (Fr.)	12%	35%	4%	12%	12%	7%	14%	13%	9%

⁺ Ryan is a short film that won an Oscar award in 2005.

^{*} Had not yet been released on DVD.

Question: A9I. Have you heard of the movie...

Base: All respondents (n=2002)

Viewership of Canadian Feature Film

- Respondents were also asked if they had seen the movies. Although viewership of each movie was only asked to those aware of each movie, the results below are provided as a percentage of the entire population. Again, significant differences are seen between Quebec and the rest of Canada across all movies, mostly but not always indicated by the language of the movie. Three English language movies are more likely to have been seen by residents of Quebec: Mambo Italiano (36% vs. 14%), Going the Distance (11% vs. 7%) and Ryan (14% vs. 4%).
- Overall, the most commonly viewed Canadian movies are English movies: Men with Brooms (26%), Mambo Italiano (20%) and Resident Evil (19%).
- The top three Fr movies seen by residents of Quebec are: Séraphin (61%), La Grand séduction (58%) and Les Invasion barbares (55%).
- As was the case with awareness, there exists many significant differences in terms of viewership between genders and between age groups.

Have you SEEN the movie... (% "Yes")	Overall	Quebec	Rest of Canada	Men	Women	15-20	21-34	35-54	55+
Men with Brooms (Eng.)	26%	8%	32%	30%	22%	32%	35%	27%	16%
Mambo Italiano (Eng.)	20%	36%	14%	18%	21%	21%	28%	19%	13%
Resident Evil: Apocalypse (Eng.)	19%	20%	18%	25%	14%	41%	33%	14%	5%
Les Invasions barbares (Fr.)	18%	55%	6%	20%	17%	13%	20%	19%	17%
La Grande séduction (Fr.)	17%	58%	3%	17%	17%	15%	18%	18%	14%
Séraphin : Un homme et son péché (Fr.)	17%	61%	2%	15%	18%	10%	18%	17%	17%
Les Boys III (Fr.)	14%	52%	2%	16%	13%	18%	18%	15%	8%
Ginger Snaps (Eng.)	12%	9%	13%	15%	9%	33%	19%	9%	4%
Le Papillon bleu (Fr.)	11%	34%	4%	11%	11%	10%	9%	13%	10%
Elvis Gratton XXX: La Vengeance d'Elvis Wong (Fr.)	10%	35%	2%	12%	9%	15%	12%	8%	9%
The Corporation (Eng.)	10%	8%	11%	13%	7%	6%	13%	11%	9%
Bollywood Hollywood (Eng.)	8%	5%	9%	9%	8%	6%	12%	9%	6%
Going the Distance (Eng.)	8%	11%	7%	10%	6%	22%	9%	6%	5%
Being Julia (Eng.)	8%	8%	8%	6%	9%	5%	3%	10%	10%
Ryan (Eng.)	6%	14%	4%	7%	6%	2%	3%	6%	10%
Ma vie en cinémascope (Fr.) *	4%	16%	1%	4%	5%	3%	3%	4%	6%
20h17 rue Darling (Fr.)	4%	15%	<1%	4%	4%	4%	5%	4%	3%

+ Ryan is a short film that won an Oscar award in 2005.

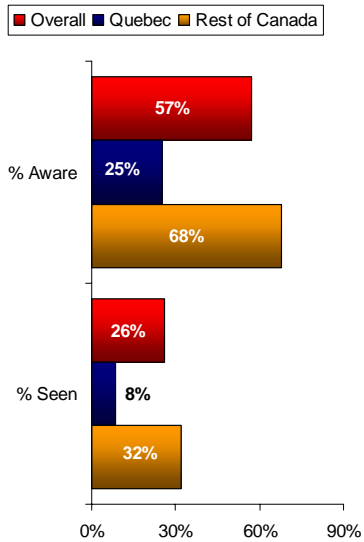
* Had not yet been released on DVD.

Question: A9II. Have you seen the movie...

Base: All respondents (n=2002)

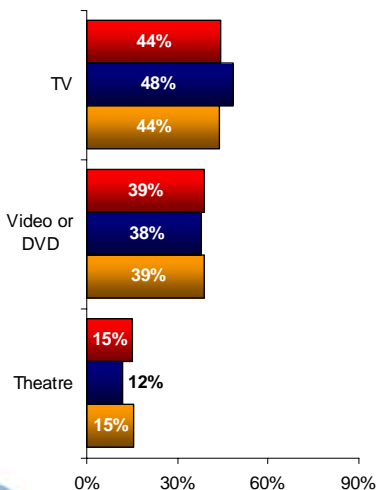
Awareness of and Viewing Canadian Film

Men with Brooms (Quatre gars et un balai)



- A little over half of Canadians are aware of Men with Brooms and 26% claim to have seen it.
- Awareness climbs to 68% and viewership increases to 32% in the rest of Canada compared to 25% and 8% in Quebec.

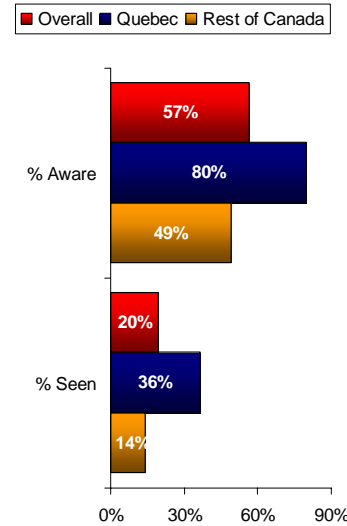
Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)



- Forty-four percent of Canadians first saw it on TV and 39% first saw it on video or DVD. Only 15% claim to have first seen Men with Brooms in the theatre.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among men.

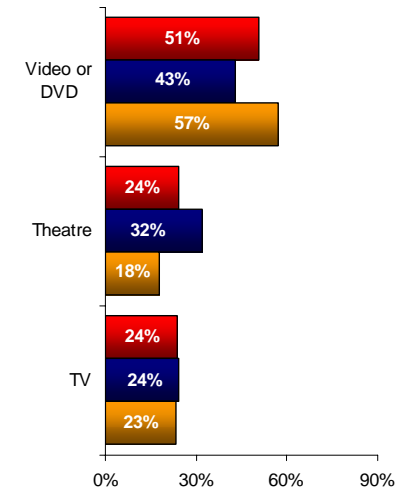
Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=500)

Mambo Italiano



- A little over half of Canadians are aware of Mambo Italiano and 20% claim to have seen it.
- Awareness climbs to 80% and viewership increases to 36% in Quebec compared to 49% and 14% in the rest of Canada.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

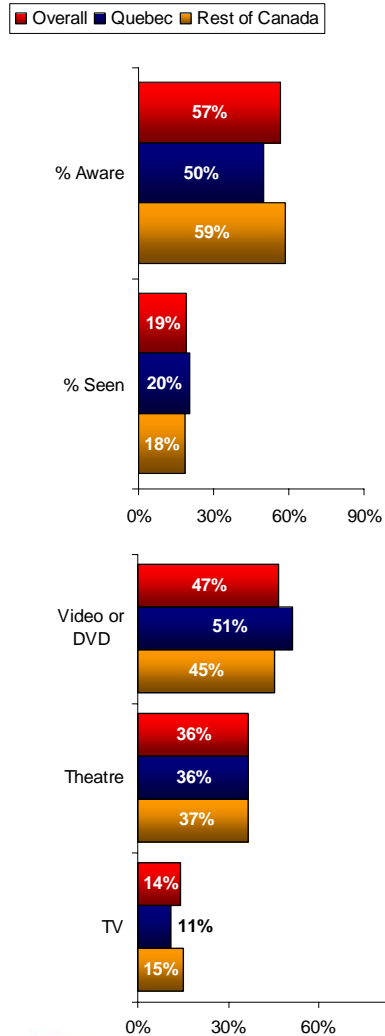


- In terms of where the movie was seen, 24% first saw it on TV and 51% first saw it on video or DVD. About 24% claim to have first seen Mambo Italiano in the theatre.
- Residents of Quebec are more likely to have first seen this movie in the theatre whereas respondents in the rest of Canada are more likely to have first seen it on video or DVD.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=439)

Awareness of and Viewing Canadian Film

Resident Evil: Apocalypse



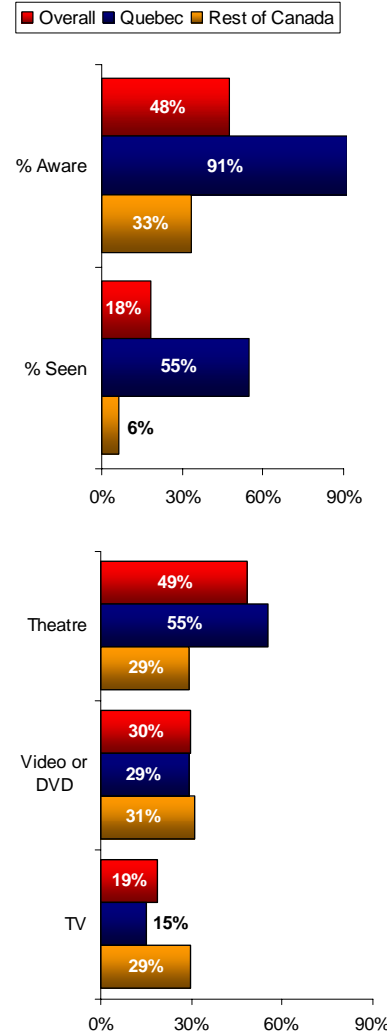
- About 57% of Canadians are aware of Resident Evil: Apocalypse and 19% have seen it.
- Awareness was slightly higher in the rest of Canada compared to Quebec (59% vs. 50%). Viewership is about the same in both regions.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

- In terms of where the movie was seen, 47% first saw it on video or DVD and 36% first saw it in the theatre. Only 14% first saw this movie on TV.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among men and among younger Canadians.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=419)

Les Invasions barbares (The Barbarian Invasions)



- A little under half of Canadians are aware of Les Invasion barbares and 18% claim to have seen it.
- Awareness climbs to 91% and viewership increases to 55% in Quebec compared to 33% and 6% in the rest of Canada.

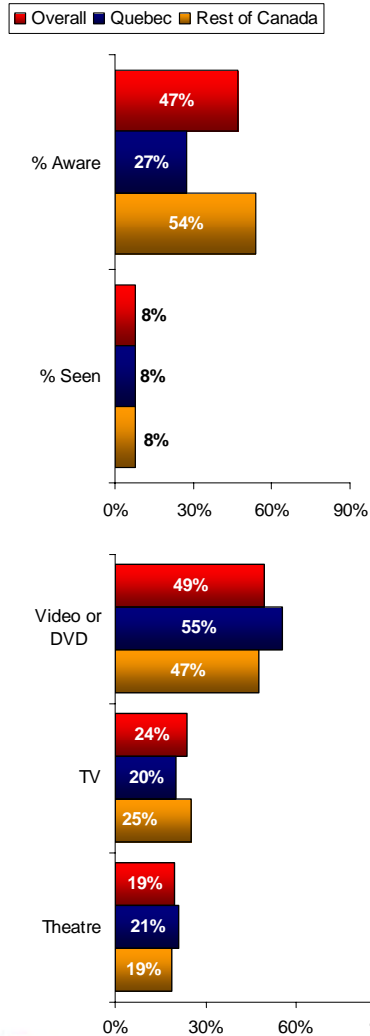
Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

- In terms of where the movie was seen, 49% first saw it in the theatre and 30% first saw it on video or DVD. Only 19% claim to have first seen this movie on TV.
- Quebec residents are much more likely to have first seen this movie in the theatre while those in the rest of Canada are more likely than residents of Quebec to have seen it on TV.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=479)

Awareness of and Viewing Canadian Film

Being Julia



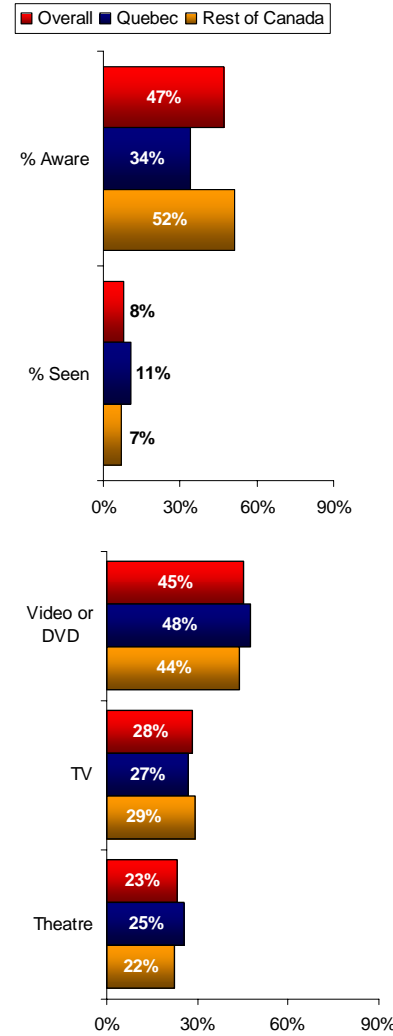
- About 47% of Canadians are aware of Being Julia and 8% claim to have seen it.
- Awareness increases to 54% in the rest of Canada compared to 27% in Quebec. Despite this gap in terms of awareness, viewership is the same.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

- In terms of where the movie was seen, 49% first saw it on video or DVD and 24% first saw it on TV. About 19% claim to have first seen this movie in the theatre.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among women and older respondents.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=146)

Going the Distance



- A little under half of Canadians are aware of Going the Distance and 8% claim to have seen it.
- Awareness increases to 52% in the rest of Canada compared to 34% in Quebec. Viewership statistics are very similar in the two regions for this movie.

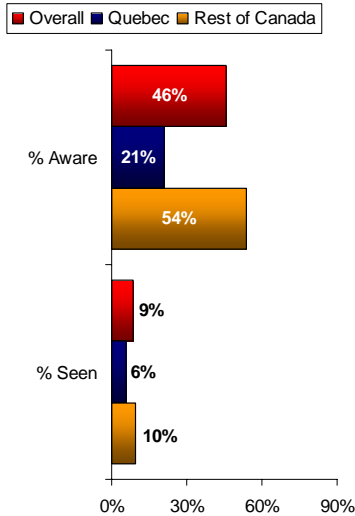
Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

- In terms of where the movie was seen, 45% first saw it on video or DVD and 28% first saw it on TV. About 23% claim to have first seen this movie in the theatre.
- As the results on the summary slides show, this movie seems to have been much more popular among young Canadians.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=189)

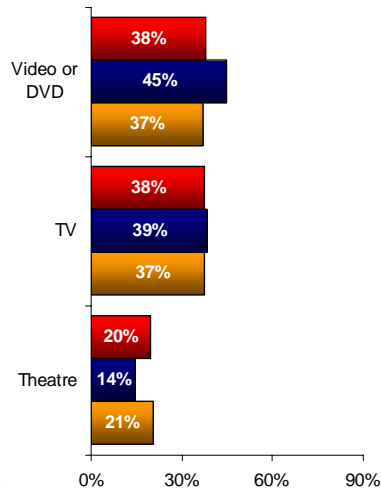
Awareness of and Viewing Canadian Film

Bollywood Hollywood



- About 46% of Canadians are aware of Bollywood Hollywood and 9% claim to have seen it.
- Awareness climbs to 54% in the rest of Canada compared to 21% in Quebec.

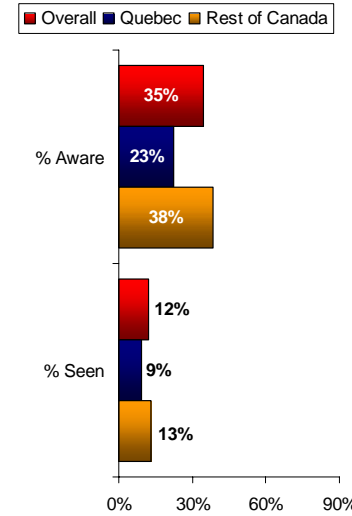
Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)



- In terms of where the movie was seen, 38% first saw it on video/ DVD and 38% first saw it on TV. About 20% claim to have first seen this movie in the theatre.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among respondents in the middle age brackets (21 to 54 years old).

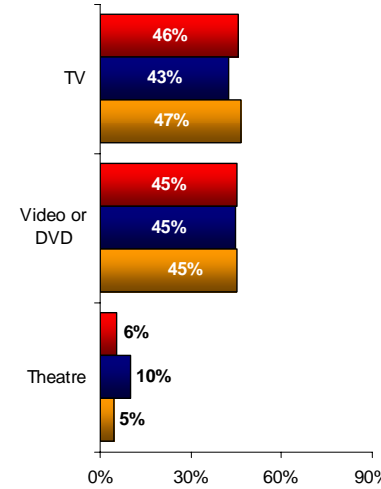
Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=147)

Ginger Snaps



- A little over one-third of Canadians are aware of Ginger Snaps and 12% claim to have seen it.
- Awareness increases to 38% in the rest of Canada compared to 23% in Quebec. Viewership is very similar in both regions.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

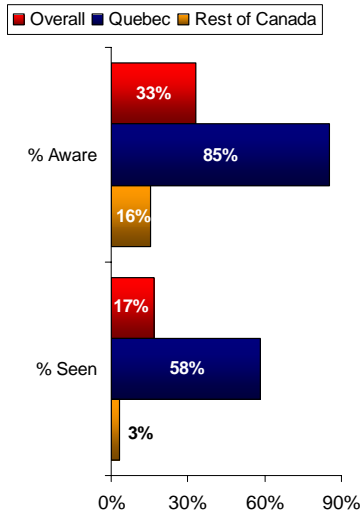


- In terms of where the movie was seen, it appears respondents are just as likely to have first seen this movie on TV as they are to have first seen it on video or DVD. Only 6% claim to have first seen this movie in the theatre.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among men and among young Canadians.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=272)

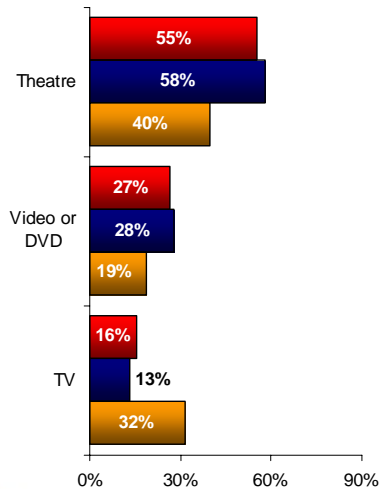
Awareness of and Viewing Canadian Film

La Grande séduction (Seducing Dr. Lewis)



- One-third of Canadians are aware of La Grande séduction and 17% claim to have seen it.
- Awareness climbs to 85% and viewership increases to 58% in Quebec compared to 16% and 3% in the rest of Canada.

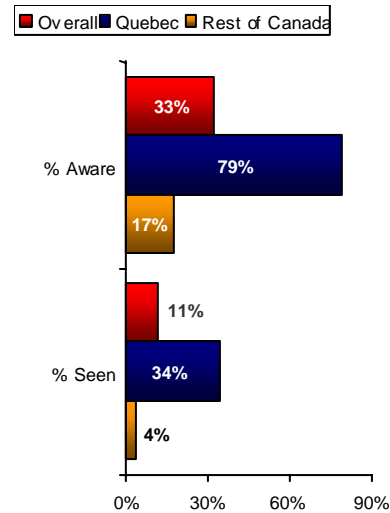
Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)



- In terms of where the movie was seen, 55% first saw it in the theatre and 27% first saw it on video or DVD. Only 16% claim to have first seen this movie on TV.

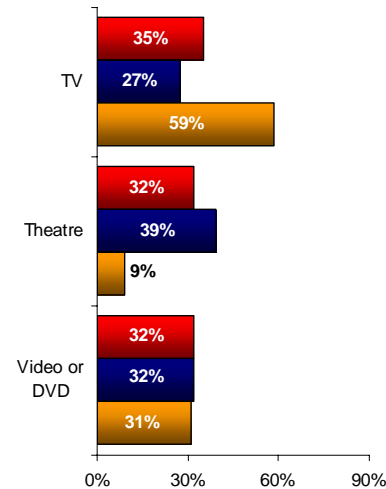
Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=487)

Le Papillon bleu (The Blue Butterfly)



- One-third of Canadians are aware of Le Papillon bleu and 11% claim to have seen it.
- Awareness climbs to 79% and viewership increases to 34% in Quebec compared to 17% and 4% in the rest of Canada.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

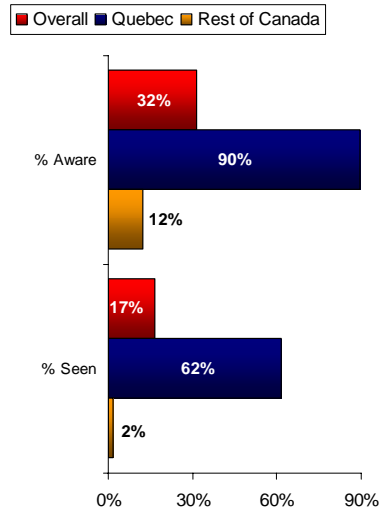


- In terms of where the movie was seen, 35% first saw it on TV and similar proportions (32%) first saw it in the theatre and on video or DVD.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among women.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=305)

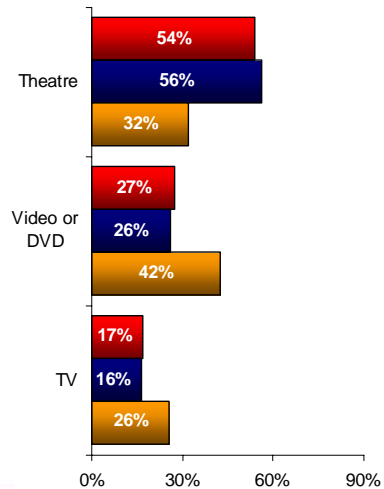
Awareness of and Viewing Canadian Film

S raphin : Un homme et son p ch  (S raphin: Heart of Stone)



- Thirty-two percent of Canadians are aware of S raphin: Un homme et son p ch  and 17% claim to have seen it.
- Awareness climbs to 90% and viewership increases to 62% in Quebec compared to 12% and 2% in the rest of Canada.

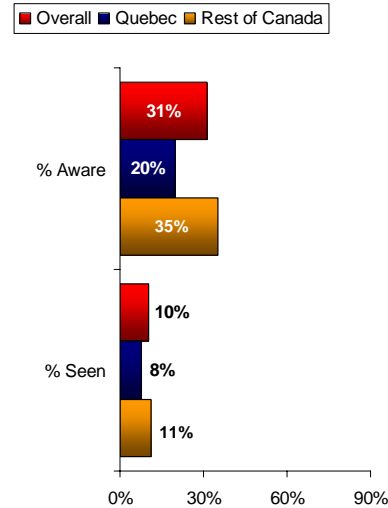
Question: A9I. Have you heard of the movie...
Question: A9II. Have you seen the movie...
Base: All respondents (n=2002)



- In terms of where the movie was seen, 54% first saw it in the theatre and 27% first saw it on video or DVD. Only 17% claim to have first seen this movie on TV.

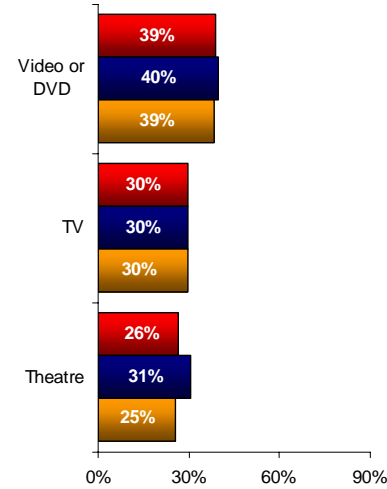
Question: A9III. Where did you see the movie...
Base: Seen the movie (n=479)

The Corporation



- Just under one third of Canadians are aware of The Corporation and 10% claim to have seen it.
- Awareness increases to 35% in the rest of Canada compared to 20% in Quebec. Viewership is very similar in both regions.

Question: A9I. Have you heard of the movie...
Question: A9II. Have you seen the movie...
Base: All respondents (n=2002)

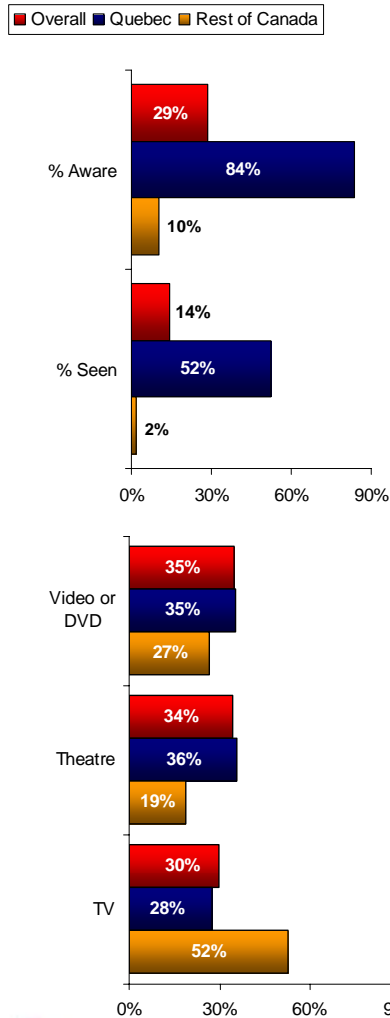


- In terms of where the movie was seen, 39% first saw it on video or DVD and 30% first saw it on TV. About one-quarter claim to have first seen this movie in the theatre.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among men and among respondents over the age of 20.

Question: A9III. Where did you see the movie...
Base: Seen the movie (n=187)

Awareness of and Viewing Canadian Film

Les Boys III



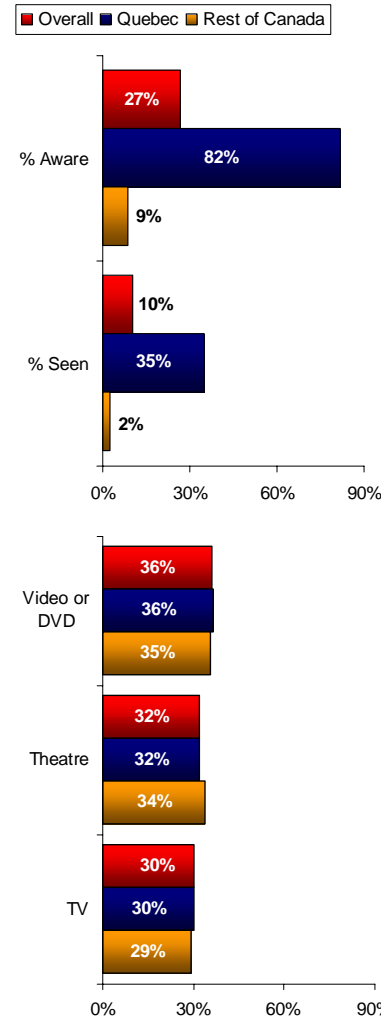
- About 29% of Canadians are aware of Les Boys III and 14% claim to have seen it.
- Awareness climbs to 84% and viewership increases to 52% in Quebec compared to 10% and 2% in the rest of Canada.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

- In terms of where the movie was seen, 35% first saw it on video or DVD and 34% first saw it in the theatre. About 30% claim to have first seen this movie on TV. The theatre and video or DVD are more common in Quebec whereas the TV is more common in the rest of Canada.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=437)

Elvis Gratton XXX : La Vengeance d'Elvis Wong



- A little over one quarter of Canadians are aware of Elvis Gratton XXX and 10% claim to have seen it.
- Awareness climbs to 82% and viewership increases to 35% in Quebec compared to 9% and 2% in the rest of Canada.

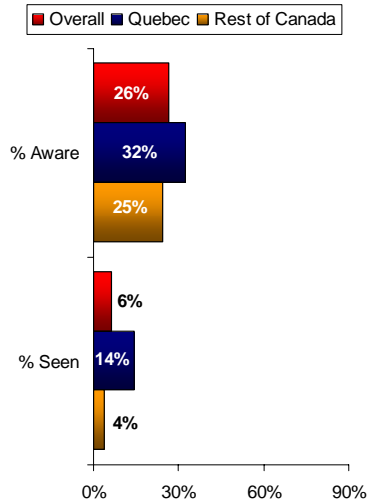
Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

- In terms of where the movie was seen, it would appear that respondents are just as likely to have first seen this movie in any of the top three ways. As well, there are no major differences across regions.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=299)

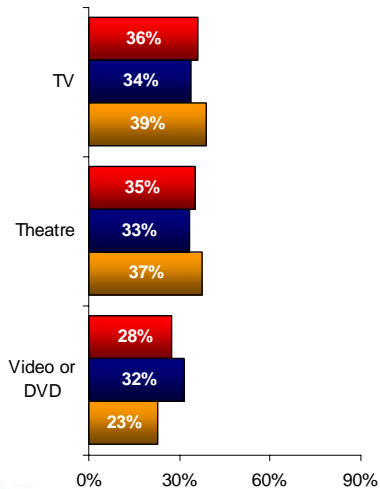
Awareness of and Viewing Canadian Film

Ryan



- About one quarter of Canadians are aware of Ryan and 6% claim to have seen it.
- Awareness and viewership were slightly higher in Quebec at 32% and 14% respectively compared to results among respondents from the rest of Canada (25% and 4%).

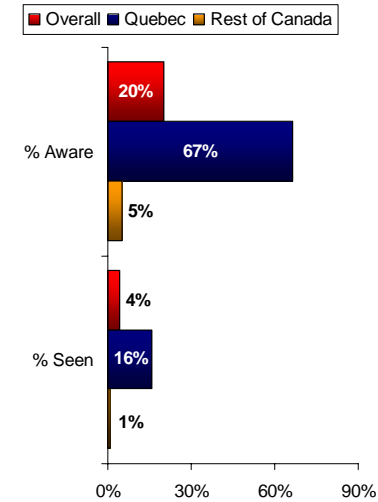
Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)



- In terms of where the movie was seen, 36% first saw it on TV and 35% first saw it in the theatre. About 28% claim to have first seen this movie on video or DVD.
- As the results on the summary slides show, this movie seems to have been somewhat more popular among older Canadians.

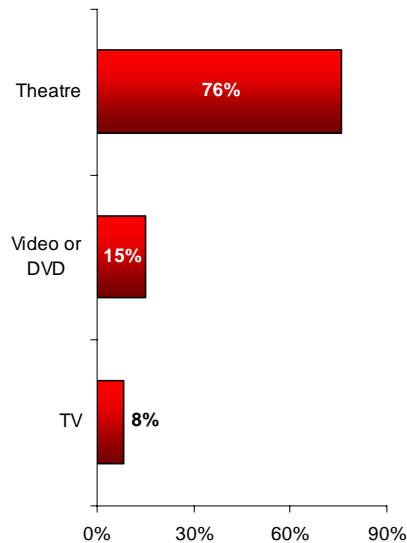
Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=136)

Ma vie en cinémascope



- One in five Canadians are aware of Ma vie en cinémascope and 4% claim to have seen it.
- Awareness climbs to 67% and viewership increases to 16% in Quebec compared to 5% and 1% in the rest of Canada.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)

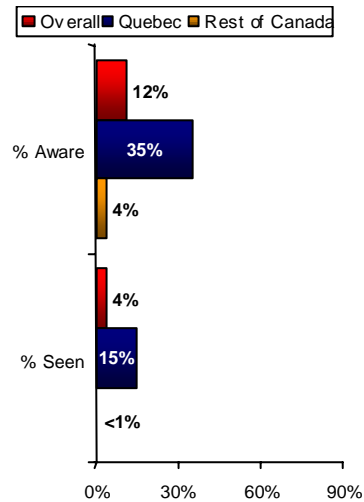


- In terms of where the movie was seen, 76% first saw it in the theatre and 15% first saw it on video or DVD. Only 8% claim to have first seen this movie on TV. The theatre is much more common among Quebec residents although a comparison is difficult since only 7 respondents in the rest of Canada have seen this movie.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=124)

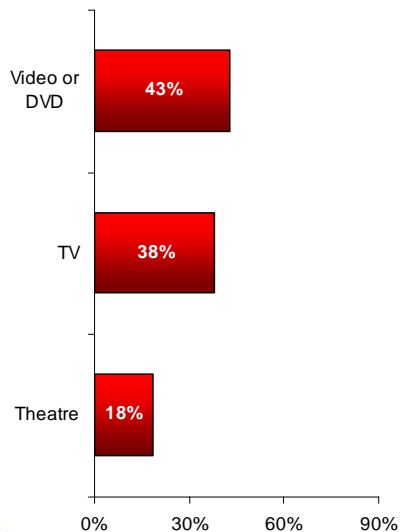
Awareness of and Viewing Canadian Film

20h17 rue Darling (8:17 p.m. Darling Street)



- A little over one in ten Canadians are aware of 20h17 rue Darling and 4% claim to have seen it.
- Awareness climbs to 35% and viewership increases to 15% in Quebec compared to 4% and under 1% in the rest of Canada.

Question: A9I. Have you heard of the movie...
 Question: A9II. Have you seen the movie...
 Base: All respondents (n=2002)



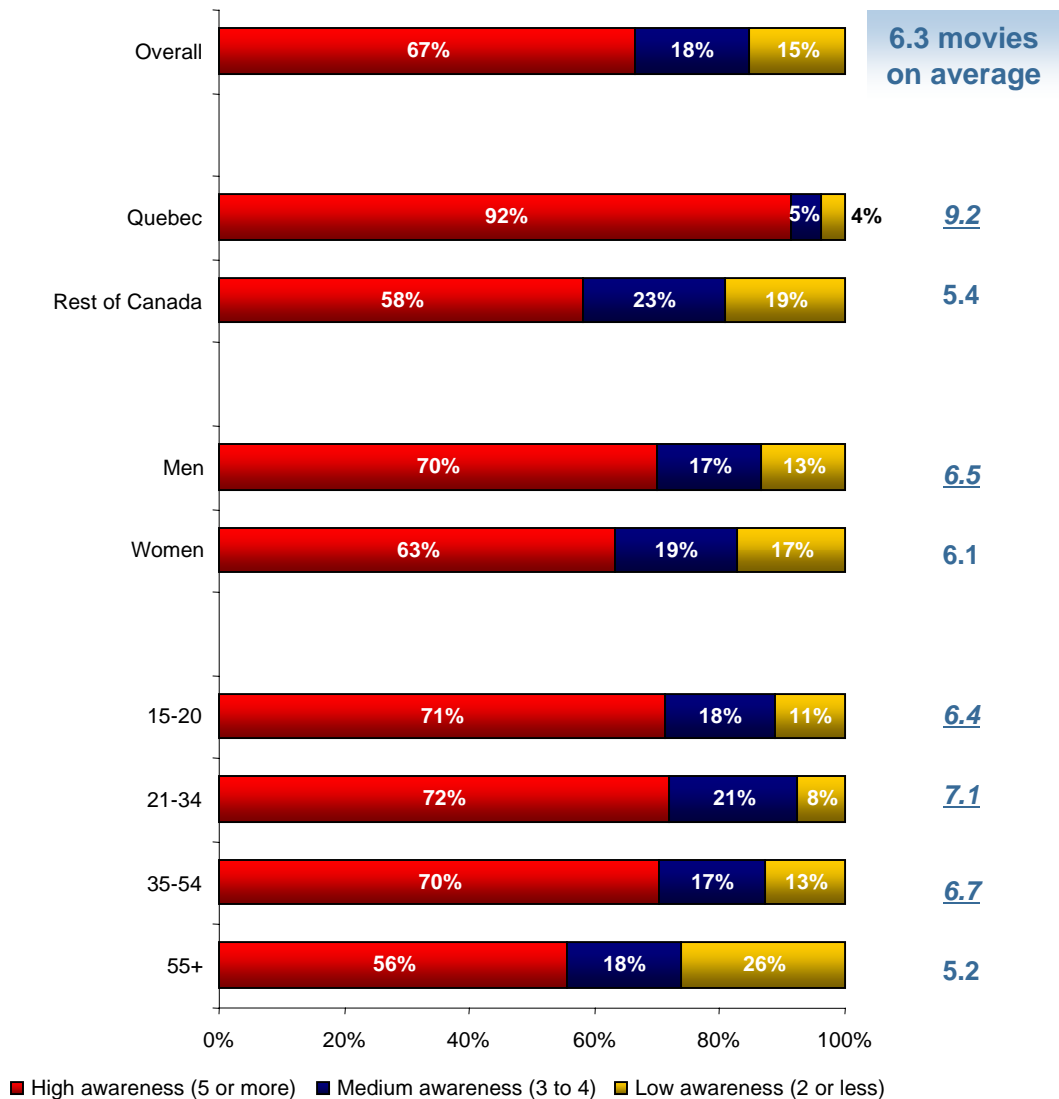
- In terms of where the movie was seen, 43% first saw it on video or DVD and 38% first saw it on TV. About 18% claim to have first seen this movie in the theatre.
- Overall results are shown due to the low sample size in the rest of Canada.

Question: A9III. Where did you see the movie...
 Base: Seen the movie (n=189)

Summary of Awareness and Viewership of Canadian Film

- It appears that by looking at these various Canadian films, the well-recognized French films are more often first seen in theatres, whereas English films are more likely to be first seen through other channels, i.e. on video, DVD or television.
- This data also suggests that in Quebec, and particularly for French Canadian films, audiences are more willing to go and see these well-recognized films in theatres, and therefore paying more than if they had chosen to rent the movies or to watch them on television.
- People are waiting longer to watch the English movies, possibly because awareness of these movies is lower.

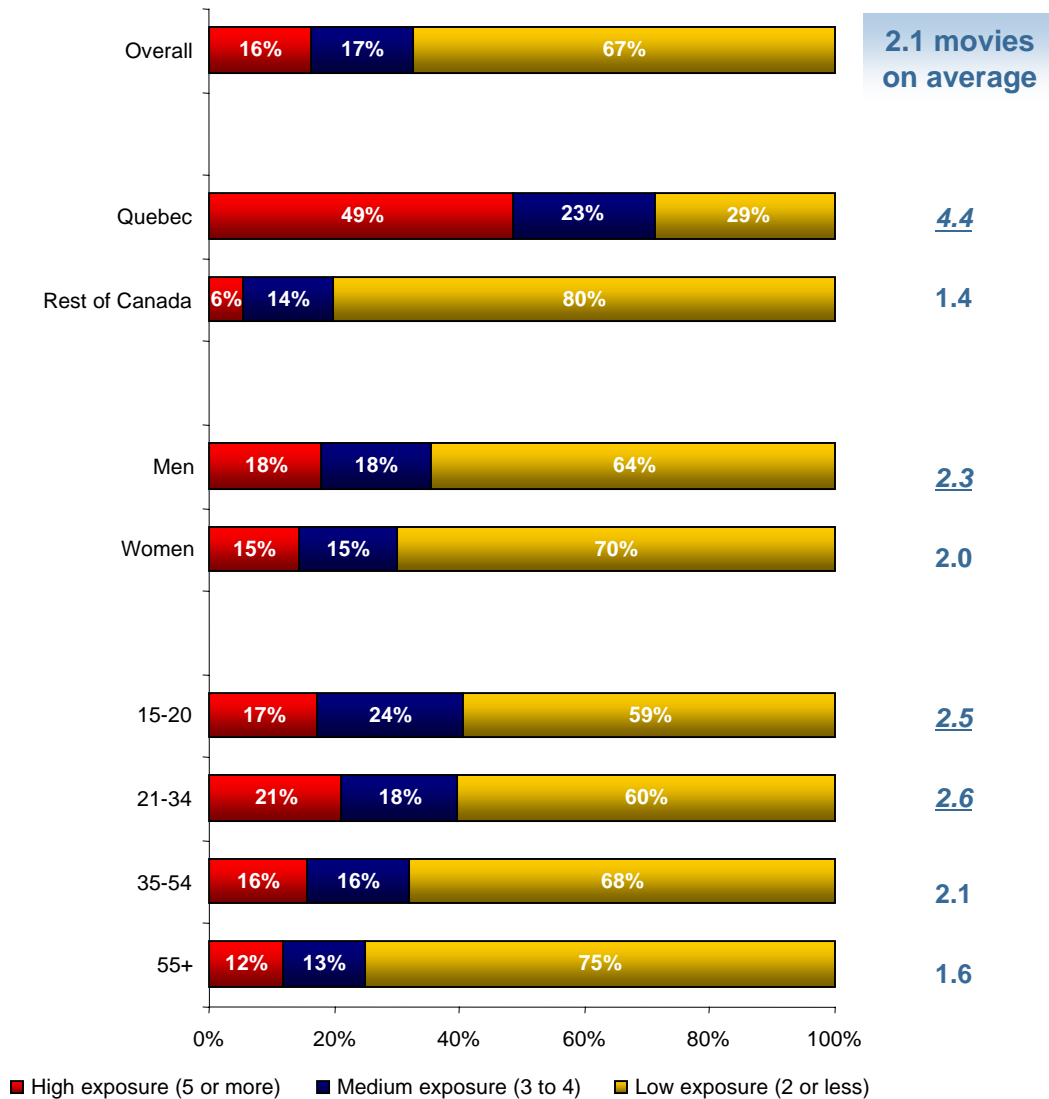
Overall Awareness of Canadian Feature Film



Question: A9I. Have you heard of the movie...
Base: All respondents (n=2002)

- Respondents were categorized based on their level of awareness of Canadian feature films: “High awareness” (aware of 5 or more Canadian feature films), “Medium awareness” (aware of 3 to 4), and “Low awareness” (aware of 2 movies or less), based on the feature films listed in the survey. On average, of the 17 movies listed, Canadians are aware of 6 Canadian films, with 67% indicating a high level of awareness, 18% indicating a medium level of awareness, and 15% indicating a low level of awareness.
- Many significant differences exist across the various demographic variables. A full 92% of Quebec residents show high awareness of Canadian films, with an average of 9 movies, as compared to the rest of Canada where 58% show high awareness (5 movies on average).
- Men are also more aware of Canadian films than women, with 70% highly aware compared to 63%.
- Ages 15 to 54 are, on average, more likely to show high levels of awareness of Canadian films than those 55 and over. Younger Canadians are aware of approximately 7 movies, compared to 5 movies among those 55 and over.

Overall Exposure to Canadian Feature Film



- Similarly to what was done with awareness, Canadians were categorized based on the number of Canadian films they have seen: “High exposure” (has seen 5 or more Canadian feature films), “Medium exposure” (has seen 3 to 4), and “Low exposure” (has seen 2 movies or less), based on the feature films listed in the survey. On average, Canadians have seen 2 of the 17 Canadian films listed in the survey, with 16% showing a high level of exposure, 17% a medium level of exposure, and 67% a low level of exposure.
- Regional differences manifest clearly. Half of Quebec residents (49%) show a high level of exposure to Canadian films with an average of 4 movies seen, as compared to the rest of Canada where 6% show a high level of exposure, and averaging one film.
- Ages 15 to 34 have, on average, seen more Canadian films than those 35 and over. Approximately 19% indicate a high level of exposure to Canadian films, versus 12% among those 35 and over.

Other Canadian Feature Films Viewed

Movie	Quebec
Le Survenant	18%
Elles étaient cinq	11%
Camping sauvage	10%
Le Dernier tunnel	9%
Gaz Bar Blues	6%
Monica la mitraille	5%
Sur le seuil	4%
Nouvelle-France	4%
Crazy	3%
1er Juillet	3%
Québec-Montréal/Montréal-Québec	3%

Question: A10B. What other Canadian movies have you seen?
 Base: A10A "Yes", Quebec respondents (n=281)

Movie	Rest of Canada
Sweet hereafter	4%
Monica la mitraille	3%
Big Fat Greek Wedding	3%
Les Triplettes de Belleville	3%
St-Ralph	3%
Declin de l'empire Americain	2%
Memoire affective	2%
Canadian Bacon	2%
La Legende de l'homme rapide	2%
Quebec-Montreal/Montreal-Quebec	1%
Daniel and the Superdogs	1%
Dawn of the dead	1%

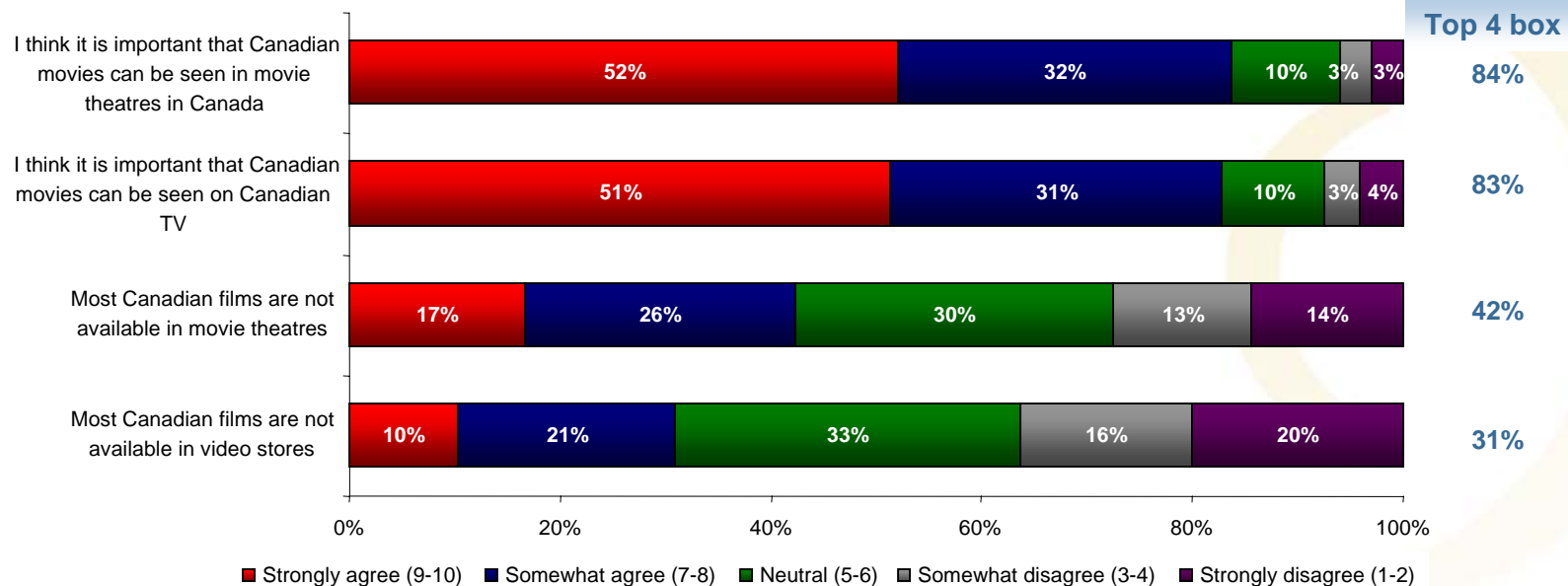
Question: A10B. What other Canadian movies have you seen?
 Base: A10A "Yes", Rest of Canada (n=225)

- Twenty-eight percent of Canadians indicate that they have seen other Canadian movies over the past year. In Quebec, 45% indicate having seen other Canadian films, which is over twice as high as what is observed in the rest of Canada at 22%.
- Quebec residents listed many more films than did residents in the rest of Canada, most of them being French films. The more common films included: Le Survenant, Elles étaient cinq and Camping sauvage.
- Among those from the rest of Canada claiming to have seen a Canadian movie within the past year, no film is mentioned by more than 4% of qualified respondents. The more common movies include: Sweet Hereafter, Monica la mitraille, Big Fat Greek Wedding Les Triplettes de Belleville and St-Ralph.
- It is important to note that for these questions, respondents were free to refer to any movie they perceived as being Canadian movies. Furthermore, they could name a movie irrespective of when it was produced.
- The most common means by which respondents viewed these additional movies are the theatre (49%), on video or DVD (38%) and on television (20%).
- *The full list of movies, where the movie was mentioned by at least 1% of respondents from the Rest of Canada, is provided on this page. Please refer to the Appendix for a detailed list of all other films mentioned by respondents.*

Attitudes Toward Canadian Feature Film

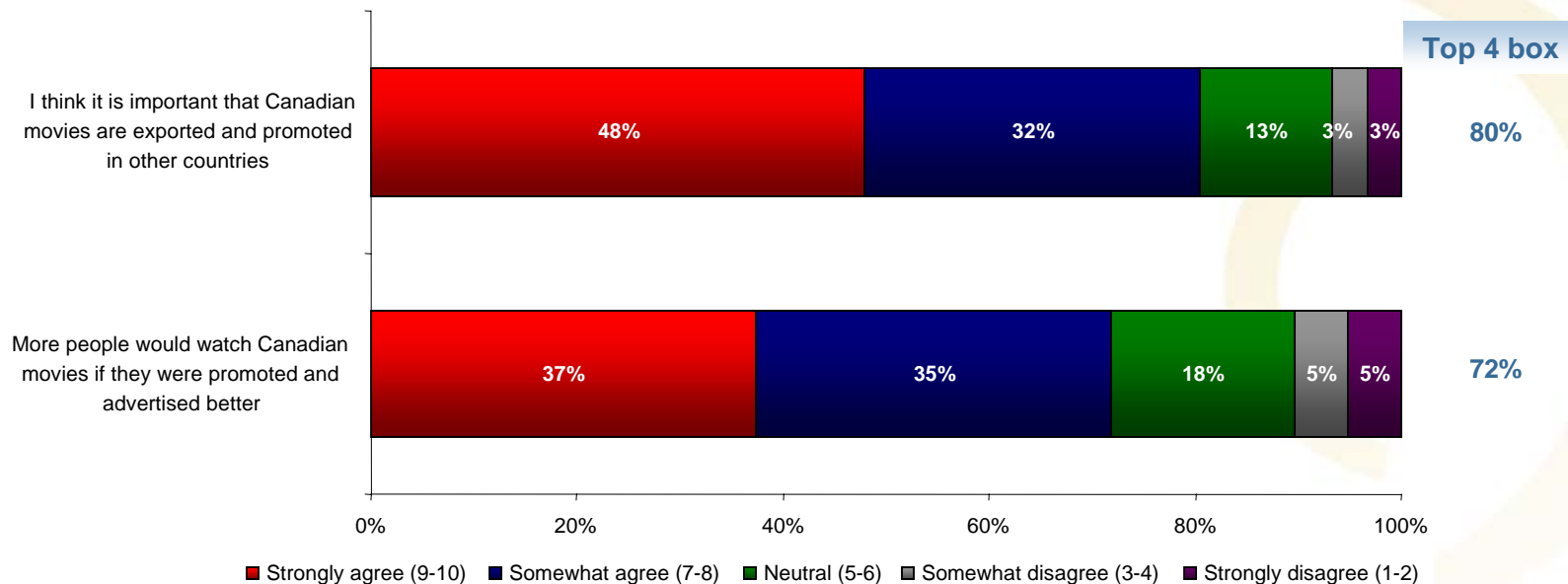
Availability of Canadian Feature Film

- Canadians were asked the extent to which they agree with some statements around the availability of Canadian film. While Canadians appear to firmly believe that Canadian movies should be seen in Canadian movie theatres and on Canadian television, they are less certain as to whether or not Canadian movies are readily available in movie theatres or in video stores.
- More than four-fifths (84%) of Canadians agree that it is important that Canadian movies be seen in movie theatres in Canada. About the same amount agree that it is important that Canadian movies be seen on television (83%). As for actual availability in theatres and video stores, two-fifths (42%) of Canadians believe that most Canadian films are not available in movie theatres and 31% agree that most Canadian films are not available in video stores.
- Quebec residents are more likely than respondents in the rest of Canada to agree that it is important that Canadian movies be seen in movie theatres in Canada (91% vs. 81%) and on Canadian television (86% vs. 82%). Residents in the rest of Canada are more likely to agree with the statements on the lack of availability. Forty-seven percent agree that most Canadian films are not available in movie theatres (versus 30% in Quebec) and 32% agree that most Canadian films are not available in video stores (versus 27% in Quebec).



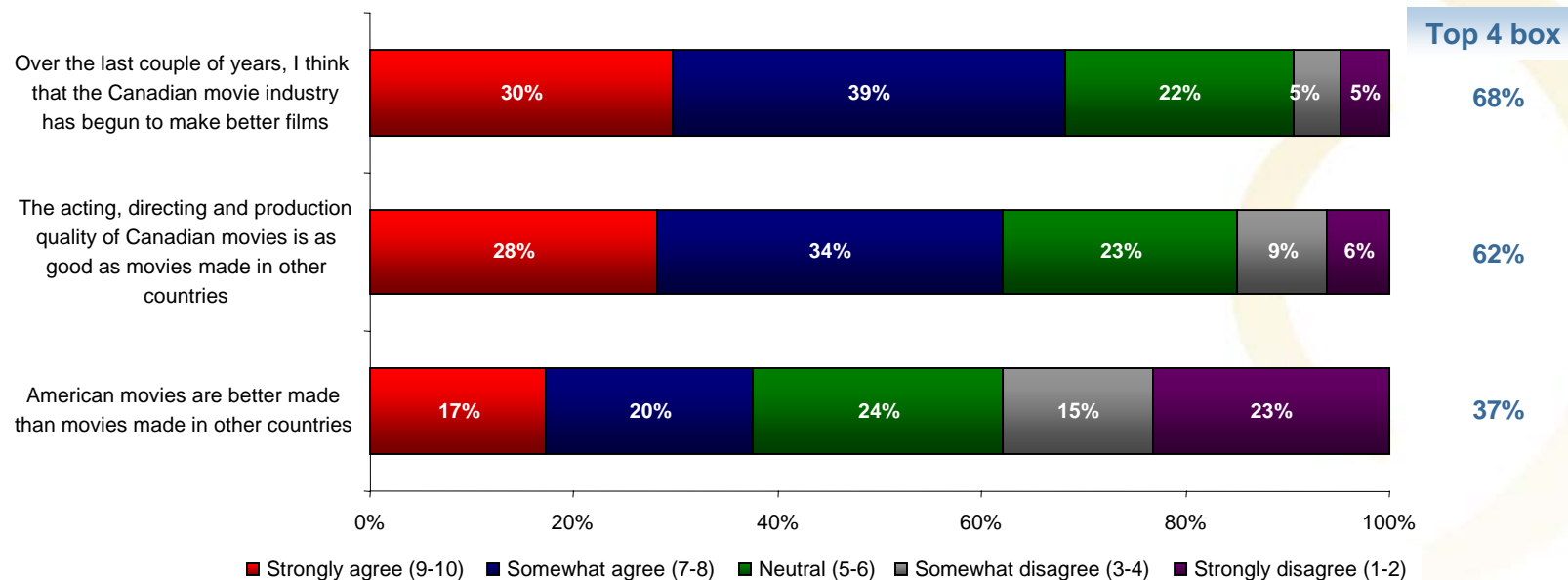
Promotion of Canadian Film

- Canadians also seem to have strong opinions on the promotion of Canadian movies in other countries and on the impact that greater promotion would have on domestic viewership. Four-fifths (80%) of Canadians agree that it is important that Canadian movies are exported and promoted in other countries. Quebec residents are more likely to agree with this statement (85% vs. 79% among respondents in the rest of Canada). Women (83%) are also more likely to agree with this statement compared to men (78%).
- Almost three-quarters of Canadians (72%) believe that more people would watch Canadian movies if they were promoted and advertised better. Although no significant differences exist by region, women are more likely to agree with this statement than men (75% vs. 68%). Fifteen to fifty-four year olds (74%) are also more likely to agree with this position compared to older respondents (64%).



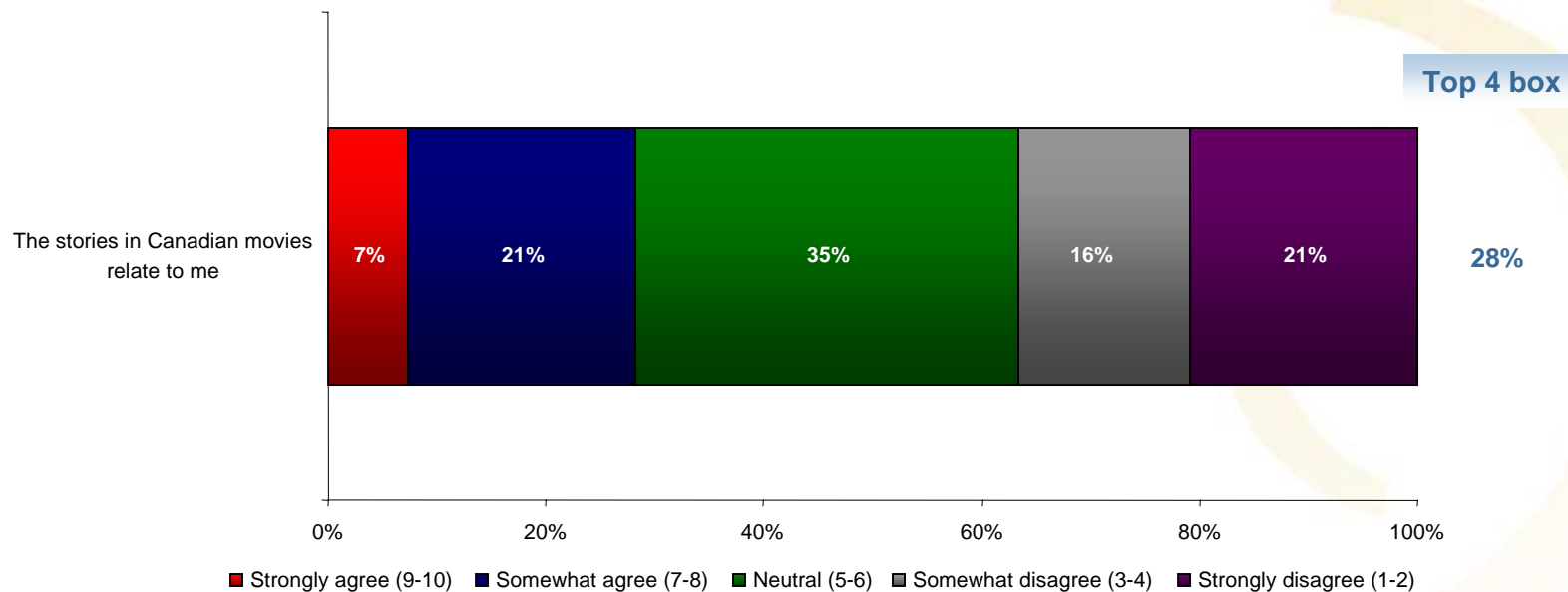
Quality of Canadian Film

- Sixty-eight percent of the Canadian population agree that over the last couple of years, the Canadian movie industry has begun to make better films. Quebec respondents (81%) are more likely to agree with this compared to respondents from the rest of Canada (64%). Women (73%) are also more likely to agree with this compared to men (63%). Also, respondents aged 21 to 54 (71%) are more likely to agree with this position compared to those in the 15 to 20 age bracket (60%).
- Six in ten respondents (62%) believe that the acting, directing and production quality of Canadian movies are as good as movies made in other countries. Seventy-two percent of respondents from Quebec agree, a significantly higher proportion than respondents from the rest of Canada (59%). Respondents between 35 and 54 years of age are also more likely to agree with this statement, compared to younger Canadians.
- There is decidedly less conviction on whether or not American movies are better made than movies made in other countries. Only 37% agree with this stance while 24% assume a more neutral stance and 38% disagree. There are no significant differences across regions, however women (41%) tend to be slightly more likely to agree than men (34%).



Canadian Movies Relating to Canadians

- Canadians do not seem convinced that the stories in Canadian movies relate to them. While only 28% agree that the stories in Canadian movies do relate to them, 37% disagree and 35% assume a more neutral stance. There is once again a regional difference as 37% of Quebec respondents believe that the stories relate to them compared to only 25% in the rest of Canada.
- About 29% percent of respondents aged 21 and older agree that the stories relate to them, as compared to 20% among 15 to 20 year olds. As well, non-visible minorities are more likely to feel movies relate to them compared to visible minorities (31% vs. 22%).



Question: A11. Please rate your level of agreement with the following statements.
Base: All respondents (n=2002)

General Attitudes Toward Canadian Film

- The table below provides a summary of the top four box scores for all questions related to general attitudes toward Canadian film. It outlines significant differences between Quebec and the rest of Canada, between men and women, the differences among age groups, and those between visible minorities and those who are not of a visible minority.
- Overall, Quebec residents feel more strongly than the rest of Canada about the importance of exposure and promotion of Canadian feature films in Canada and in other countries. Quebec residents also feel more strongly about the quality of Canadian film and feel that Canadian film is as good as what is produced in other countries.
- Please refer to the table for more detailed comparisons between key segments of the population.

Attitudes Toward Canadian Film: Population Segment Summary (Top Four Box Scores)	Overall	Quebec	Rest of Canada	Men	Women	15-20	21-34	35-54	55+	Visible Minority	Non-Vis. Minority
I think it is important that Canadian movies can be seen in movie theatres in Canada	84%	<u>91%</u>	81%	80%	<u>87%</u>	82%	<u>86%</u>	<u>85%</u>	79%	81%	<u>86%</u>
I think it is important that Canadian movies can be seen on Canadian TV	83%	<u>86%</u>	82%	79%	<u>87%</u>	80%	<u>87%</u>	<u>85%</u>	77%	81%	85%
I think it is important that Canadian movies are exported and promoted in other countries	80%	<u>85%</u>	79%	78%	<u>83%</u>	74%	<u>83%</u>	<u>84%</u>	76%	79%	83%
More people would watch Canadian movies if they were promoted and advertised better	72%	70%	73%	68%	<u>75%</u>	<u>74%</u>	<u>77%</u>	<u>74%</u>	64%	76%	72%
Over the last couple of years, I think that the Canadian movie industry has begun to make better films	68%	<u>81%</u>	64%	63%	<u>73%</u>	60%	<u>71%</u>	<u>71%</u>	66%	64%	<u>73%</u>
The acting, directing and production quality of Canadian movies is as good as movies made in other countries	62%	<u>72%</u>	59%	63%	61%	57%	58%	<u>66%</u>	61%	61%	64%
Most Canadian films are not available in movie theatres	42%	30%	<u>47%</u>	41%	44%	38%	<u>50%</u>	42%	39%	41%	41%
American movies are better made than movies made in other countries	38%	34%	39%	34%	<u>41%</u>	<u>45%</u>	41%	38%	31%	<u>44%</u>	36%
Most Canadian films are not available in video stores	31%	27%	<u>32%</u>	28%	34%	26%	27%	<u>35%</u>	31%	25%	31%
The stories in Canadian movies relate to me	28%	<u>37%</u>	25%	27%	29%	20%	<u>29%</u>	<u>28%</u>	<u>31%</u>	22%	<u>31%</u>

Question: A11. Please rate your level of agreement with the following statements.

Base: All respondents (n=2002)

Note: Frequencies identified in underlined, bolded, italicized text are those values significantly higher than those in another segment of the population.

Comparing Attitudes in 1998 to 2005

- Attitudes toward the availability of Canadian film have not changed significantly since 1998. Still in 2005, 84% of Canadians believe that it is important for Canadian movies to be seen in movie theatres in Canada. There has been a slight increase, from 80% in 1998* to 83% in 2005, in the number of Canadians who agree that it is important for Canadian movies to be available on television. Also in 1998, 43% agreed that most Canadian films are not available in movie theatres and video stores, versus 42% in 2005 agreeing that Canadian films are not available in theatres, and 31% who agree that Canadian films are not available in video stores.
- Canadians still agree on the importance of promotion of Canadian film, with similar findings in 2005 as in 1998.
- When asked about the quality of Canadian film, there is consistency in the attitudes of Canadians. Canadians still agree that over the past couple of years, the Canadian movie industry has begun to make better films (68% in 2005 vs. 70% in 1998). A similar proportion of Canadians are in agreement that American movies are better made than movies in other countries (38% agreed in 2005 vs. 39% in 1998) and there has been a slight increase in the level of agreement among Canadians that that the acting, directing and production quality of Canadian movies is as good as movies made in other countries (62% in 2005 vs. 58% in 1998).

*Note that the 1998 Angus Reid study values have been adjusted so that percentages do not include the percentage of the population who answered "don't know".

Changes in Attitude Toward Canadian Film: Top 4 Box Summary		
Availability	2005	1998
I think it is important that Canadian movies can be seen in movie theatres in Canada	84%	84%
I think it is important that Canadian movies can be seen on Canadian TV	83%	80%
Most Canadian films are not available in movie theatres	42%	43%
Most Canadian films are not available in video stores	31%	
Promotion	2005	1998
I think it is important that Canadian movies are exported and promoted in other countries	80%	81%
More people would watch Canadian movies if they were promoted and advertised better	72%	72%
Quality	2005	1998
Over the last couple of years, I think that the Canadian movie industry has begun to make better films	68%	70%
The acting, directing and production quality of Canadian movies is as good as movies made in other countries	62%	58%
American movies are better made than movies made in other countries	38%	39%

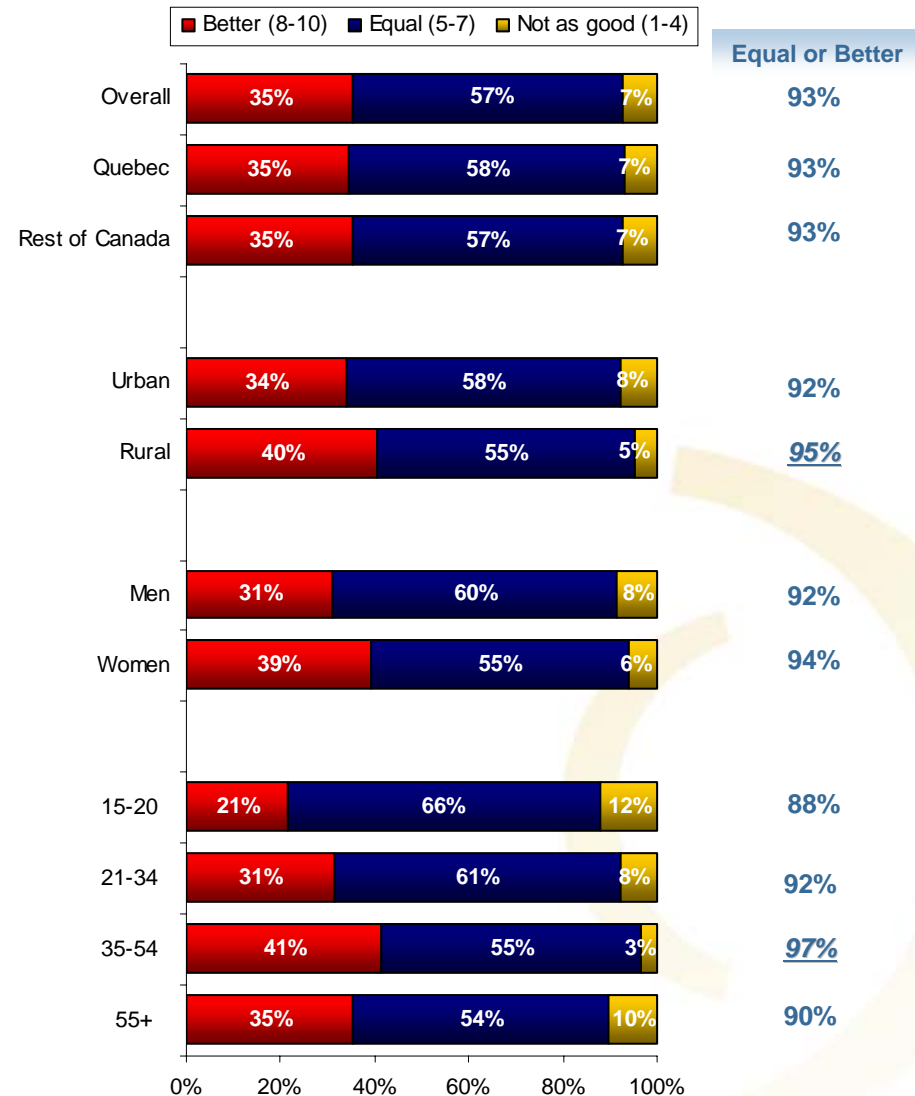
Detailed Results

Canadian Music Industry



Perceptions of Quality of Canadian Music

- Canadians believe that Canadian music can hold its own on the international stage. The quality of music by Canadian artists is seen by 93% of the general population to be either of equal or better quality than music by foreign artists. Only 7% seemed to believe that it is not as good as music by foreign artists.
- This perception is equally as strong in Quebec as it is in the rest of Canada.
- There is a difference in perception between urban and rural respondents. Fully 95% of rural respondents compared to 92% of urban respondents feel that the quality of music by Canadian artists is equal to or better than music by foreign artists.
- Women seem to feel that Canadian music is better than music by foreign artists (39% vs. 31% among men).
- Finally, the perception that the quality of Canadian music is better seems to increase steadily with age, declining again after the age of 55. Forty-one percent of those between 35 and 54 feel Canadian music is better, significantly higher than opinions shared by 31% of those 21 to 34 years old and by 21% of the youngest contingent.

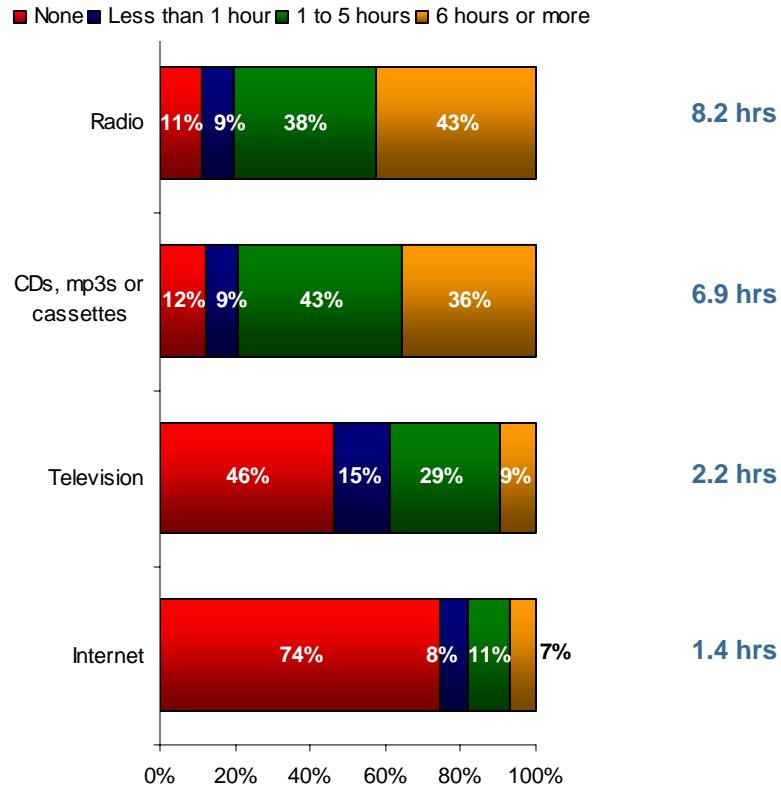


Question: B6. Please rate the quality of music by Canadian artists as compared to foreign artists.
 Base: All respondents (n=2,002)

Listening Habits

Music Listening Habits of Canadians

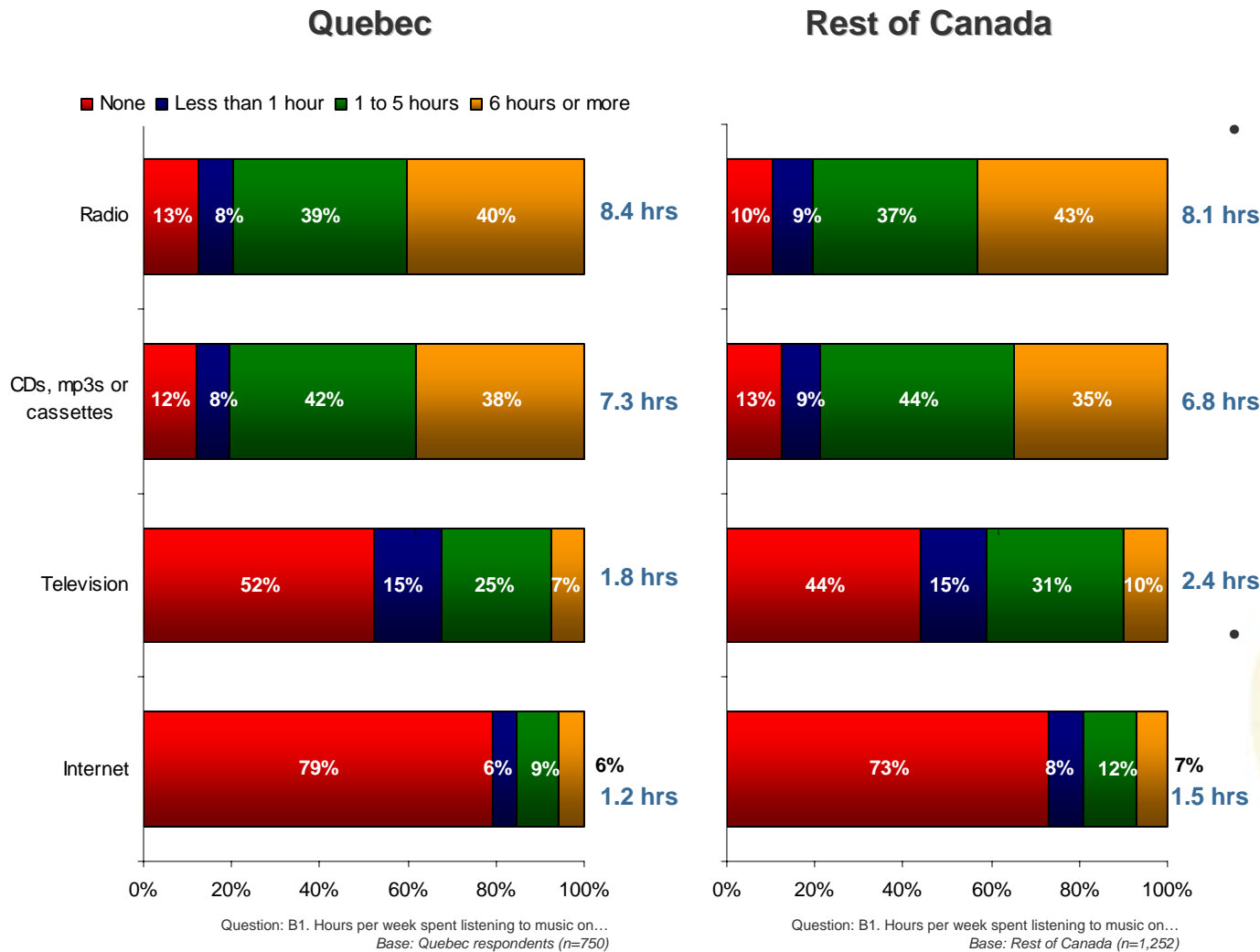
Average Time Per Week



Question: B1. How many hours in an average week do you spend listening to music on...
 Base: All respondents (n=2,002)

- Respondents were asked to estimate the number of hours per week spent listening to music using different technologies. The radio is the most common way that Canadians listen to music on a weekly basis, followed by CDs, mp3s or cassettes. Just over half of the Canadian population listens to music on the television (54%) and about 26% listens to music over the Internet to varying degrees over an average week.
- For this question, and others similar to it in that a range was used as a method to summarize responses (e.g., 1 to 5 hours per week), a midpoint is used so that it is possible to estimate the average (e.g. the average amount of time spent listening to the radio in a given week).
- The average amount of time per week is displayed for each technology next to its frequency distribution.

Music Listening Habits of Canadians



- Comparing Quebec and the rest of Canada, there is no difference in the amount of time spent listening to CDs, mp3s or cassettes. Quebec residents are more likely not to spend any time listening to music on the Internet or on television.
- The average amount of time per week is displayed for each technology next to its frequency distribution.

Music Listening Habits of Canadians

- The table below demonstrates the average amount of time spent listening to music by population segment, for each of the technologies that one may use to listen to music. As earlier described, when a range is used as a method to summarize responses (e.g., 1 to 5 hours per week), a midpoint is used so that it is possible to estimate the average (e.g. the average amount of time spent listening to the radio in a given week).
- Men listen to more music on the Internet than women, and rural residents listen to more music on television than urban residents.
- Across age groups, respondents between the ages 15 and 34 spend more time listening to music on the Internet and on CDs, mp3s and cassettes. Ages 15 to 20 spend the least amount of time listening to the radio, whereas respondents 35 to 54 are the most avid radio listeners (52% listen to over 6 hours of radio per week, an average of about 10 hours). This compares to 31% among the youngest age bracket of 15 to 20 year olds, who listen to the radio an average of 6 hours per week.
- The 15 to 20 year olds are also most likely to listen to music on television, for an average of about 3½ hours per week, more than all older age groups with their combined average of about 2 hours per week.

Average Number of Hours Spent Listening to Music per Week	Overall	Quebec	Rest of Canada	Men	Women	Urban	Rural	15-20	21-34	35-54	55+
On the radio	8.2	8.4	8.1	7.8	8.5	8.1	8.8	5.8	8.3	9.7	6.9
On CDs, mp3s or cassettes	6.9	7.3	6.8	7.3	6.6	7.7	6.7	12.8	8.7	6.7	3.7
On television	2.2	1.8	2.4	2.1	2.3	2.1	2.9	3.5	2.1	1.9	2.3
On the Internet	1.4	1.2	1.5	1.8	1.1	1.6	1.3	4.8	2.5	0.7	0.3
Total:	18.8	18.8	18.8	19.0	18.5	19.5	19.7	26.8	21.5	19.1	13.1

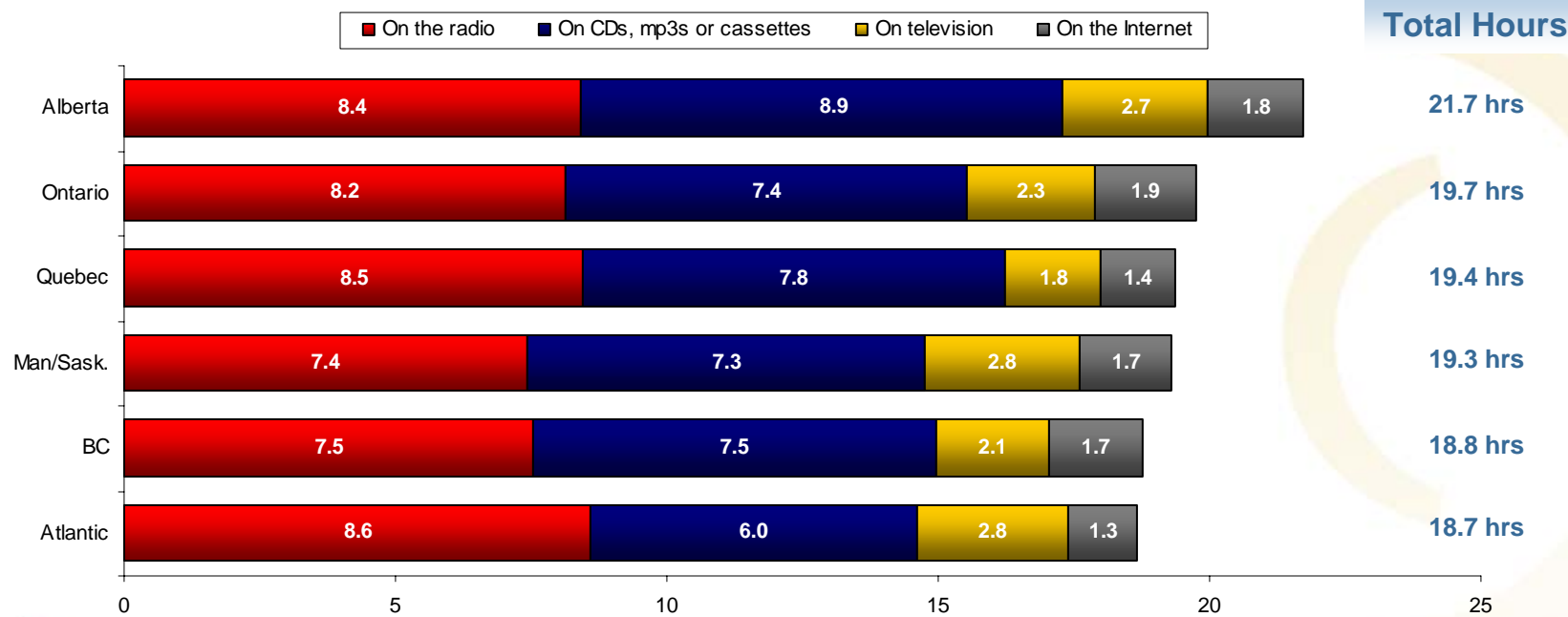
Question: B1. How many hours in an average week do you spend listening to music on...

Base: All respondents (n=2,002)

Note: Frequencies identified in underlined, bolded, italicized text are those values significantly higher than those in another segment of the population.

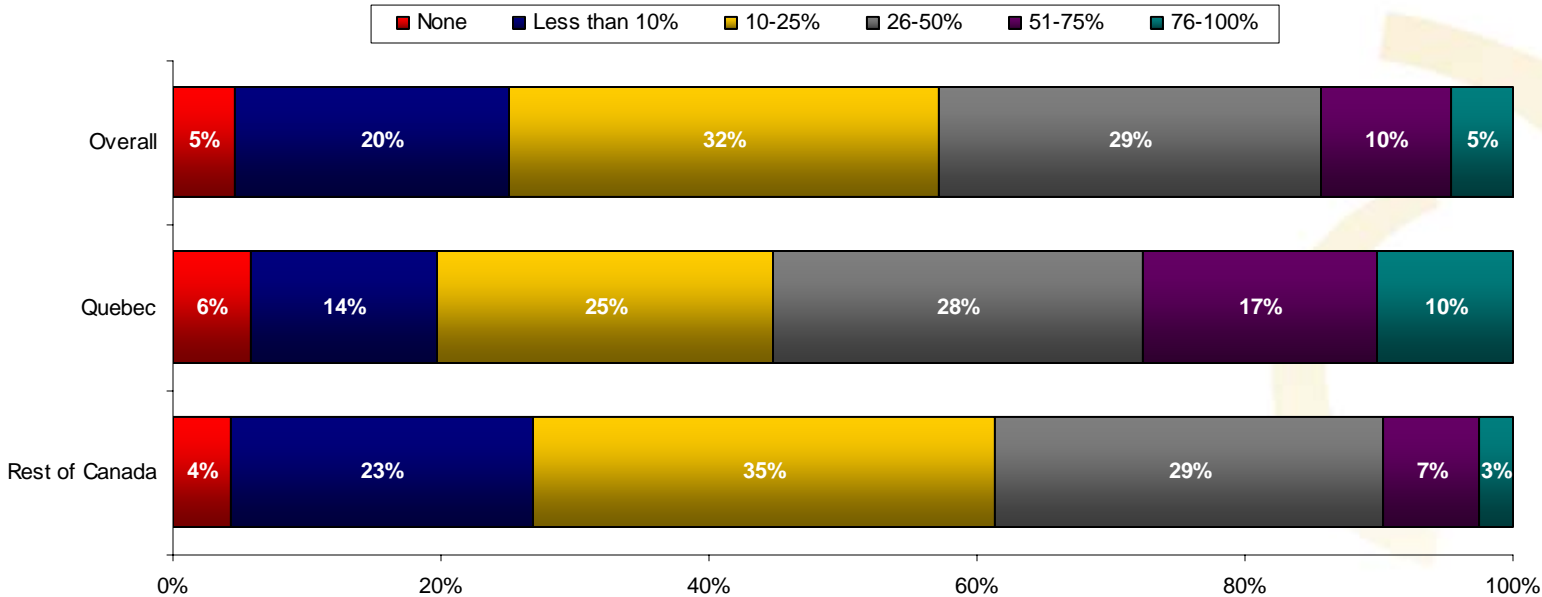
Hours Per Week Spent Listening to Music by Province

- Alberta residents spent the most time of all provinces listening to CDs, mp3s or cassettes, with 14% who claim they listen to more than 25 hours per week. British Columbia residents spend the least amount of time listening to the radio, with 29% listening to none or less than one hour.
- After calculating the average number of hours per week spent listening to music on the various technologies, a comparison is made of the total number of hours per week spent listening to music by province. Alberta pulls out as the province that listens to the most music on average per week, while the rest of Canada listens to about the same total number of hours per week. This works out to a total of about 22 hours per week in Alberta, while the rest of the provinces average about 19 hours per week.



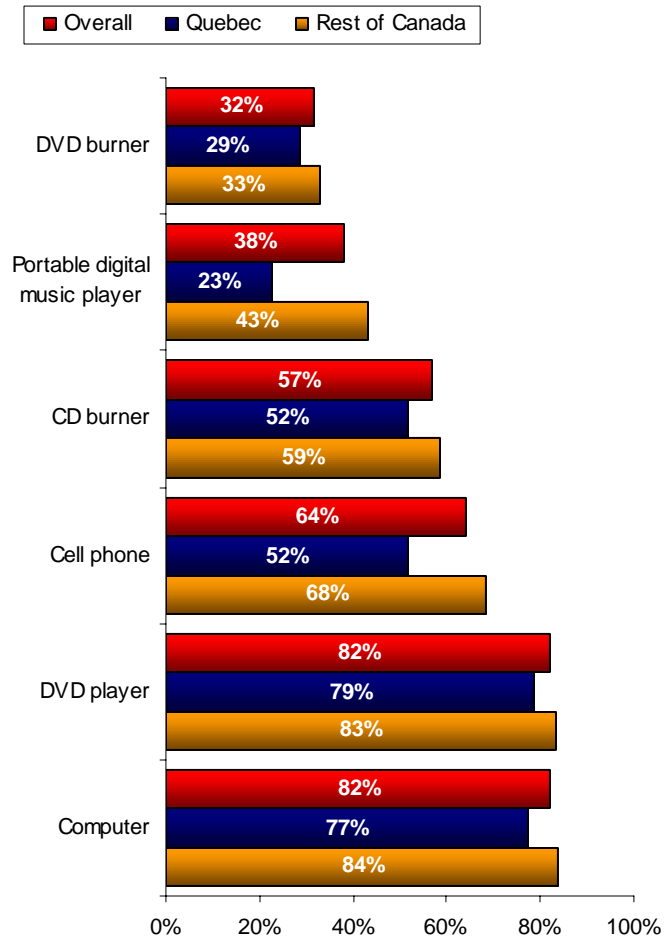
Time Spent Listening to Canadian Music

- Respondents were asked to recall the percentage of their time spent listening to music by Canadian artists. Results show that the vast majority of Canadians listen to Canadian music. In fact, 15% of Canadians spend over half their time (50% or more) listening to Canadian music. This increases to 27% among Quebec residents compared to 10% among respondents from the rest of Canada.
- In terms of differences across age groups, 9% of respondents 55 and older spend no time listening to Canadian music, a result that is significantly higher than all other age brackets.



Question: B2. What percentage of your total music listening is spent listening to music by Canadian artists?
Base: B1 Listens to music (n=1,978)

Access to Technologies



Question: B3. Do you own or have access to any of the following items?
Base: All respondents (n=2,002)

- Respondents were asked to indicate the technologies to which they had access, either at work, at home or elsewhere. Approximately four in five Canadians have access to a DVD player and a computer. Two-thirds have access to a cell phone and a CD burner. Thirty-eight percent have access to a portable digital music player, and 32% have access to a DVD burner.
- When compared to respondents in the rest of Canada, Quebec residents are less likely to have access to most technologies, including a DVD player (79% vs. 83%), a computer (77% vs. 84%), a portable digital music player (23% vs. 43%) and a cell phone (52% vs. 68%).

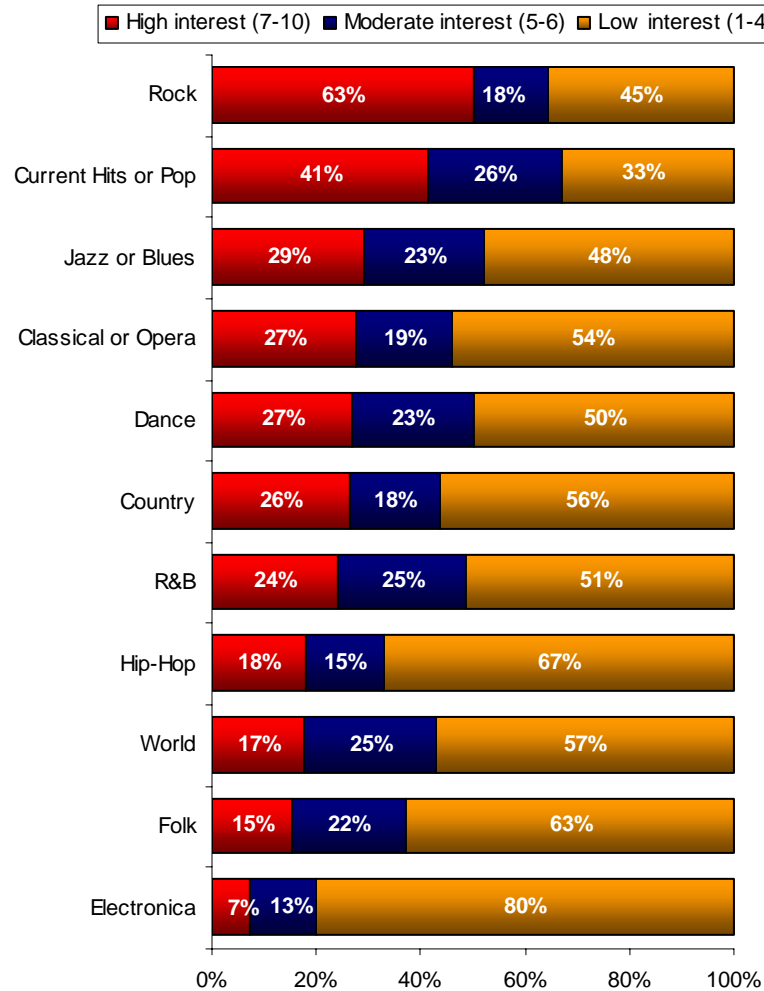
Access to Technologies

- As one would expect, there are a number of significant differences in terms of technology adoption across various key demographic variables.
- Canadians between the ages of 15 and 54 are much more likely to have access to all of the items when compared to those over 55 years of age. Ages 15 to 20 are most likely to own or have access to an mp3 player (69%) compared to 21 to 54 year olds at about 43% and to those 55 and over at 17%. The age bracket most likely to own or have access to a cell phone over all other age groups are those 35 to 54 at 74%, which is significantly higher than 63% among those 15 to 34 years old, and 51% among those 55 and over.
- As well, access to these technologies increases with household income. For instance, among households earning over \$80K, 98% own or have access to a computer, 95% a DVD player, 83% a cell phone, 77% a CD burner and 46% own a DVD burner, all significantly higher than all lower income brackets.
- Men are more likely to own or have access to DVD players, CD burners and DVD burners compared to women. Urban residents are more likely to own or have access to a computer, a DVD player and a CD player compared to rural residents (please see table below for more specific details).

Percentage of Canadians who have Access to Various Technologies (% "Yes")	Men	Women	15-20	21-34	35-54	55+	<\$40K	\$40K-\$60K	\$60K-\$80K	\$80K+	Urban	Rural
Computer	83%	81%	96%	93%	87%	63%	68%	84%	90%	98%	84%	77%
DVD player	85%	80%	95%	94%	87%	63%	67%	88%	86%	95%	84%	79%
Cell phone	63%	65%	59%	66%	74%	51%	50%	61%	75%	83%	62%	63%
CD burner	63%	51%	81%	71%	62%	30%	40%	57%	63%	77%	60%	52%
mp3 player	40%	36%	69%	45%	41%	17%	25%	36%	44%	50%	38%	34%
DVD burner	37%	27%	36%	41%	37%	16%	20%	31%	36%	46%	33%	28%

Question: B3. Do you own or have access to any of the following items?
 Base: All respondents (n=2,002)

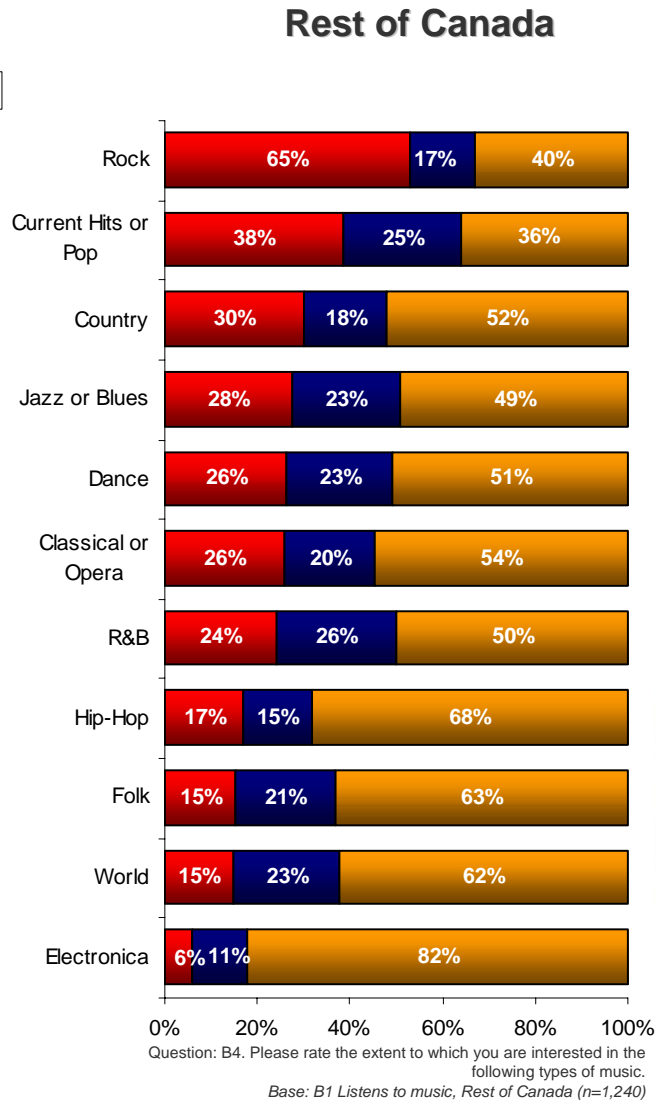
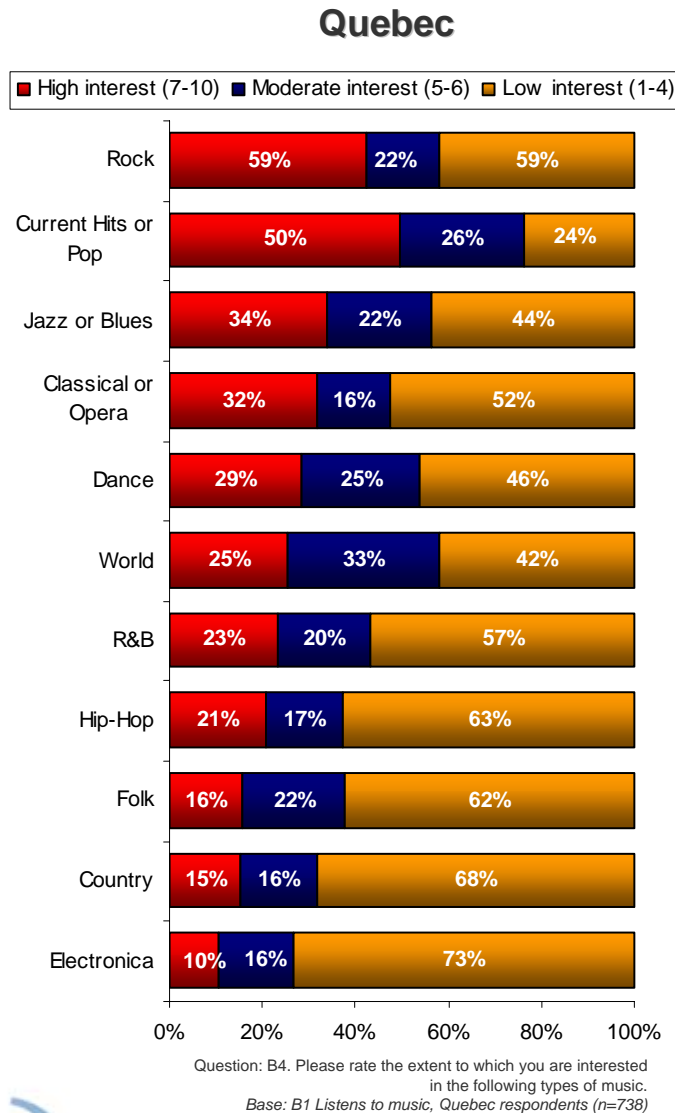
Levels of Interest in Types of Music



Question: B4. Please rate the extent to which you are interested in the following types of music.
 Base: B1 Listens to music (n=1,978)

- Canadians were asked their level of interest in various types of music. A favourite of Canadians is still rock music, being either soft rock, hard rock, or classic rock, with 63% assigning this genre a high level of interest (in other words a score of 7 or higher on a 10-point scale).
- A distant second to rock is current hits and pop music (41% have a high interest). The next tier includes jazz/blues (29%), classical/opera (27%) dance (27%), country (26%) and R&B (24%). Least favourite genres among Canadians are world (17%), folk (15%) and electronica (only 7% have high interest).
- It should be noted though that while 18% have a high interest in hip-hop, an important proportion (67%) also have a low interest. This is in fact the second highest level of “non-interest” across the genres, preceded only by electronica.

Levels of Interest in Types of Music: Quebec and the Rest of Canada



There are a few differences in musical tastes worth mentioning when comparing Quebec residents to the rest of Canada. Notably, respondents outside Quebec are significantly more likely to be highly interested in country (30% vs. 15%) whereas Quebec residents are more likely to be interested in current hits (50% vs. 38%), jazz and blues (34% vs. 28%), world music (25% vs. 15%), classical or opera (32% vs. 26%) and electronica (10% vs. 6%).

Levels of Interest in Types of Music: Gender and Age Differences

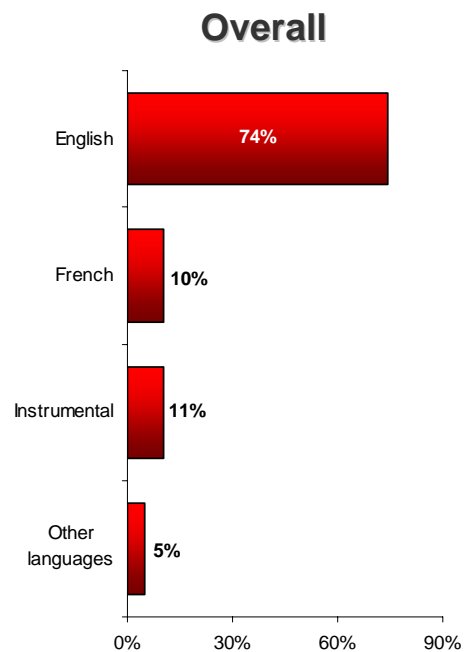
- There are also a number of significant differences in musical preferences across age groups and between genders.
- Men largely prefer rock music, with 64% indicating a high level of interest (a score of at least 7 on a 10-point scale) as compared to 55% for women. Men also more likely to prefer electronica (10% vs. 5% of women), but generally they prefer rock music over any other music, with current hits or pop at a distant second (34%). While women also prefer rock music most of all, they also show more eclectic tastes in music. Women are more likely to prefer current hits or pop (48% vs. 34%), classical or opera (31% vs. 24%), dance (34% vs. 19%), and country (29% vs. 23%).
- Respondents 55 years old and over show the highest level of interest in classical or opera, country and folk music. Younger respondents listen to a greater variety of music, including rock, hip-hop, current hits or pop and R&B. Please refer to the chart below for more details.

Level of Interest in Type of Music (Top Three Box Scores)	Overall	Men	Women	15-20	21-34	35-54	55+
Rock	59%	64%	55%	73%	73%	71%	26%
Current Hits or Pop	41%	34%	48%	47%	55%	46%	21%
Jazz or Blues	29%	30%	28%	22%	22%	38%	25%
Classical or Opera	27%	24%	31%	13%	16%	25%	45%
Dance	27%	19%	34%	30%	30%	24%	26%
Country	26%	23%	29%	14%	22%	27%	34%
R&B	24%	22%	26%	36%	27%	25%	15%
Hip-Hop	18%	17%	19%	43%	33%	12%	4%
World	17%	15%	19%	16%	17%	18%	17%
Folk	15%	14%	17%	8%	12%	16%	21%
Electronica	7%	10%	5%	12%	14%	5%	2%

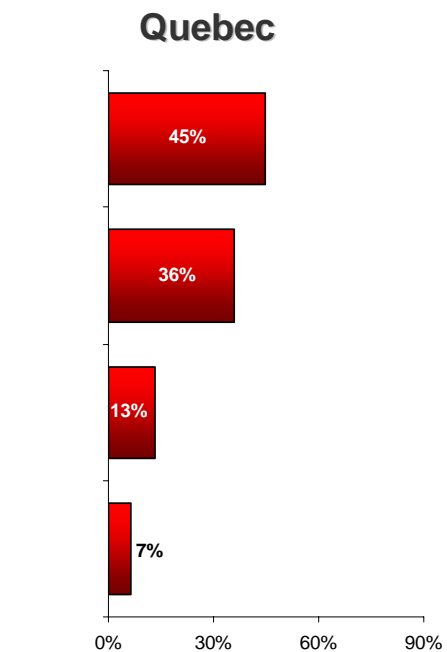
Question: B4. Please rate the extent to which you are interested in the following types of music.
Base: B1 Listens to music (n=1,978)

Percentage of Music Listened to by Language

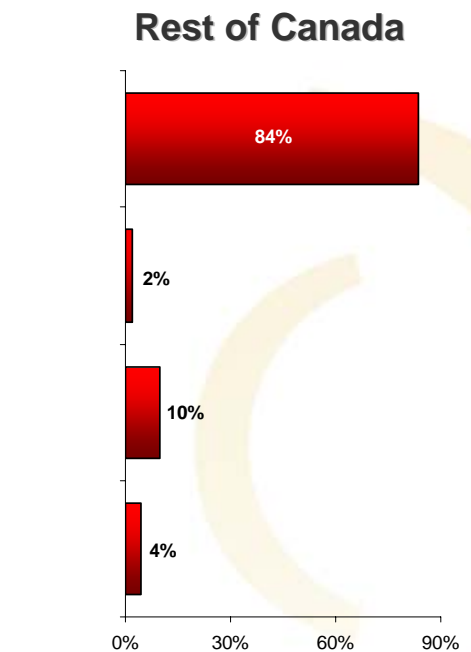
- Respondents were asked to indicate the percentage of music that they listen to that is English, French, instrumental and any other language. Overall, Canadians spend three-quarters of their music-listening time listening to English music, followed by French (10%), instrumental music (11%) and music in other languages (5%).
- Predictably, these averages are different among residents of Quebec, for whom 36% of their music-time is spent listening to French music, which compares to only 2% among respondents in the rest of Canada. Despite the dominance of the French language in Quebec, Quebec residents still spend 45% of their music-time listening to English music.



Question B5. What percent of the music that you listen to is in English, French, instrumental, and in other languages?
Base: B1 Listens to music (n=1,978)



Question B5. What percent of the music that you listen to is in English, French, instrumental, and in other languages?
Base: B1 Listens to music, Quebec respondents (n=738)



Question B5. What percent of the music that you listen to is in English, French, instrumental, and in other languages?
Base: B1 Listens to music, Rest of Canada (n=1,240)

Percentage of Music Listened to by Language

- Segments of the population most likely to listen to instrumental music are respondents over 35 years of age (about 13%, vs. younger respondents at 7%), and those having completed college, university or graduate studies (about 14%, vs. 9% among those with less education). Segments more likely to listen to music in other languages are respondents between 15 and 20 (7%, vs. 4% of respondents 55 and older), and those living in urban areas (5%, vs. 4% in rural areas).
- Although no major differences exist by gender, age differences are apparent. Respondents under 55 listen to more English music (78%, vs. 67% for ages 55 and over). Those over 35 spend more time listening to French and instrumental music than 15 to 20 year olds. Respondents who consider themselves a visible minority are more likely than those who are not of a visible minority to listen to English music (75% vs. 69%) and music in other languages (10% vs. 4%).

Language	Overall	Men	Women	15-20	21-34	35-54	55+	Visible Minority	Non-Vis. Minority	Urban	Rural
English	74%	75%	73%	80%	78%	75%	67%	75%	69%	70%	71%
French	10%	9%	11%	6%	9%	10%	13%	7%	16%	14%	16%
Instrumental	11%	11%	10%	7%	7%	10%	16%	9%	11%	11%	10%
Other languages	5%	5%	5%	7%	5%	5%	4%	10%	4%	5%	4%

Question B5. What percent of the music that you listen to is in English, French, instrumental, and in other languages?

Base: B1. Listens to music (n=1,945)

Note: A complete answer was required; partial responses were not included in this analysis.

Other Types of Music Listened to by Canadians

- The diversity of musical taste is reflective of Canada's diverse multicultural population. Canadians listen to a wide variety of music in a variety of different languages. As earlier results showed, Canadians spend about 5% of their music-time listening to music in languages other than English and French. Among these more diversified listeners, Spanish music is the most commonly stated language (37%), followed by Italian (14%) and German (11%).
- Quebec respondents are more likely than the rest of Canada to be listening to Spanish music (49% vs. 31%), whereas those in the rest of Canada are more likely than residents of Quebec to listen to German, Asian and Indian music.

Language	Overall	Quebec	Rest of Canada
Spanish	37%	49%	31%
Italian	14%	15%	14%
German	11%	6%	13%
Asian	6%	3%	7%
Eastern European/ Russian	5%	3%	6%
Middle Eastern	5%	9%	3%
Indian	4%	1%	5%
African	2%	2%	2%
Native/aboriginal	2%	1%	2%
Scandinavian	1%	<1%	1%
Everything/any	5%	<1%	6%
Other	9%	10%	9%

Base: B5. Listens to "other" languages (n=685)

Purchasing Behaviour

CD Purchases Within the Last Year

- The following tables summarize the number of CDs purchased over the past year. The table on the left summarizes the total number of CDs purchased, and the table on the right summarizes the total number of Canadian CDs purchased. Please note that the base for the total number of Canadian CDs purchased is modified to reflect the total number of respondents who identify themselves as someone who listens to music, as per question B1: “How many hours do you spend listening to music?”
- For this question, where a range was used as a method to summarize responses (e.g. 1 to 5 CDs purchased over the past year), a midpoint is used so that it is possible to estimate the average (e.g. the average number of CDs purchased over the past year). Averages are calculated as an estimate for all Canadians, and for Quebec versus the rest of Canada.
- Eighty-seven percent of music listeners purchased at least one CD over the past year either for themselves or for someone else. About 12% could consider themselves avid CD buyers (over 20 CDs purchased over the past year) and another 18% are regular buyers (i.e. a little over one CD per month is purchased on average). Overall CD purchase trends are very similar in Quebec vs. the rest of Canada, although Quebec CD buyers are more likely to buy Canadian CDs than CD buyers from the rest of Canada (an average of 5 CDs over 4 CDs).

Total CDs Purchased	Overall	Quebec	Rest of Canada
None	13%	12%	14%
1 to 5	32%	30%	32%
6 to 10	25%	28%	24%
11 to 20	18%	16%	18%
21 to 30	6%	7%	6%
More than 30	6%	7%	5%
Average:	9.6	10.1	9.5

B7. How many CDs did you buy in the past year?
Base = B1. Listens to music (n=1,978)

Total Canadian CDs Purchased	Overall	Quebec	Rest of Canada
None	26%	22%	28%
1 to 5	52%	49%	53%
6 to 10	12%	18%	11%
11 to 20	5%	7%	5%
21 to 30	1%	2%	1%
More than 30	1%	1%	1%
Average:	4.0	5.0	3.7

B8. How many of these CDs were by Canadian artists?
Base = B1. Listens to music (n=1,978)

CD Purchases Within the Last Year

- The table below demonstrates the total number of CDs and the total number of Canadian CDs purchased, by key demographic segments, and also identifies differences between Quebec and the rest of Canada.
- Canadians buy about 10 CDs per year on average, 4 of which are CDs by Canadian artists. Quebec residents are more likely than the rest of Canada to be purchasing Canadian music, although there are no major differences in the average number of CDs purchased.
- Younger Canadians buy more CDs than those aged 55 and over (11 vs. 7 total CDs), but there is no difference in the number of Canadian CDs purchased.
- Please refer to the the chart below for more details.

Population Segment	Overall		Quebec		Rest of Canada	
	Total CDs Purchased	Total Canadian CDs Purchased	Total CDs Purchased	Total Canadian CDs Purchased	Total CDs Purchased	Total Canadian CDs Purchased
Men	10	4	11	5	10	4
Women	9	4	10	5	9	4
15-20	11	4	13	5	11	4
21-34	10	4	12	5	10	4
35-54	11	4	10	5	11	4
55+	7	3	8	4	7	3
HS or less	8	3	8	4	8	3
Some Coll/Univ.	10	4	12	5	10	4
Completed Coll/Univ.	10	5	10	6	10	4
Graduate	13	6	14	5	13	5
<\$40K	8	3	8	4	8	3
\$40K-\$60K	9	4	11	6	9	4
\$60K-\$80K	11	4	10	4	12	4
\$80K+	12	5	13	6	12	5
Visible Minority	11	4	11	4	11	4
Non-Visible Minority	10	4	10	5	10	4
Urban	10	5	10	5	10	4
Rural	10	5	11	6	9	4

B7. How many CDs did you buy in the past year?
Base = B1. Listens to music (n=1,978)

B8. How many of these CDs were by Canadian artists?
Base = B1. Listens to music (n=1,978)

Where Canadians Purchase Music CDs

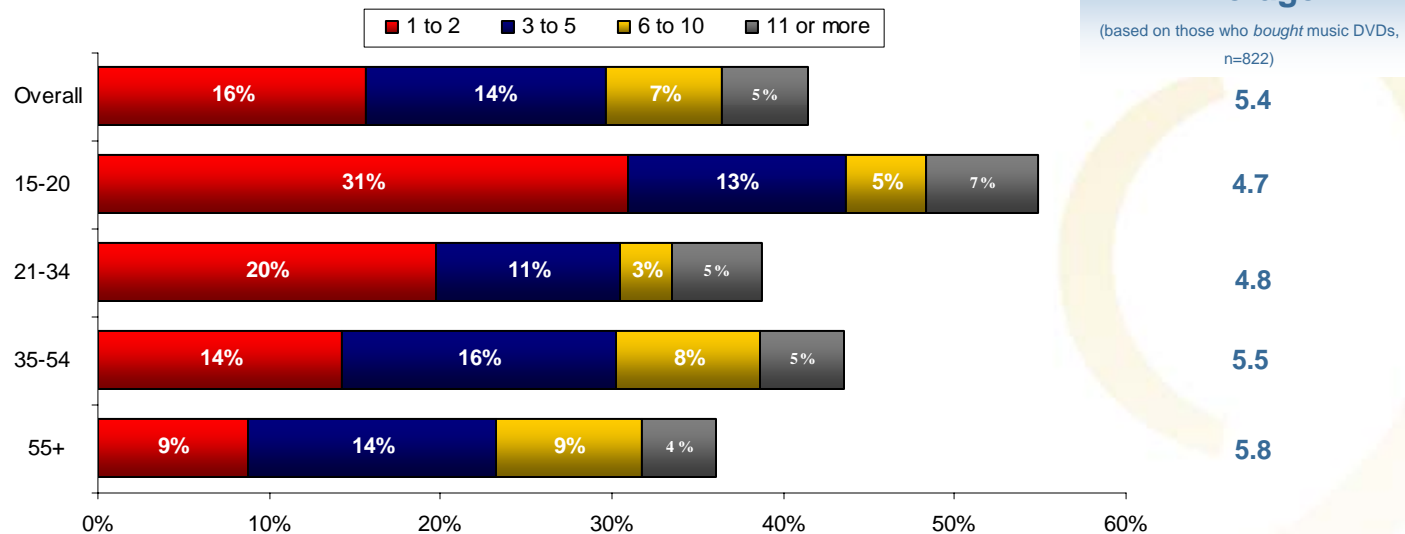
- Traditional “brick and mortar” establishments continue to dominate the CD purchasing market space in Canada. Over half of Canadians (55%) typically buy their CDs in traditional retail music stores and another 25% typically buy from big box stores. About 4% of Canadians *typically* resort to on-line shopping.
- Quebec residents are far more likely than those in the rest of Canada to buy their CDs in traditional retail music stores (72% vs. 50%) whereas those in the rest of Canada are more likely to favour big box stores (28% vs. 15% of Quebec residents) and on-line (4% vs. 2%).
- Younger Canadians tend to gravitate more toward traditional music retail outlets and to the Internet whereas older Canadians seem to prefer big box stores and general merchandise stores.

Location of Purchase	Overall	Rest of Canada					
		Quebec	15-20	21-34	35-54	55+	
Traditional Retail Music Store	55%	72%	50%	76%	61%	51%	47%
Big Box	25%	15%	28%	12%	24%	29%	24%
Online/Order	4%	2%	4%	2%	7%	4%	1%
Stores (General)	3%	1%	4%	3%	1%	4%	5%
Concerts/Clubs	1%	2%	1%	0%	1%	2%	2%
Other	6%	3%	8%	3%	3%	7%	10%
I do not buy music CDs	6%	5%	6%	3%	3%	5%	10%

Question: B9a. Where do you typically buy your music CDs?
 Base: B1. Listens to music (n=1,978)

Number of Music DVDs Purchased in Last Year

- Forty-one percent of Canadians purchased a music DVD over the past year. Within this group, 16% had purchased 1 or 2, 14% purchased 3 to 5 and 7% purchased 6 to 10 music DVDs. A small proportion (5%) could be considered avid music DVD buyers, having purchased 11 or more music DVDs over the past year.
- Although there are generally no significant differences seen between Quebec and the rest of Canada, some more specific differences are seen across provinces. British Columbia residents are most likely than all other provinces to indicate not buying any music DVDs (67%). Respondents in Ontario, Quebec and the Maritimes generally buy more music DVDs compared to respondents in Western provinces.
- For this question, where a range was used as a method to summarize responses (e.g. 1 to 2 music DVDs purchased over the past year), a midpoint is used so that it is possible to estimate the average (e.g. the average number of music DVDs purchased over the past year). Please note that averages are based on those respondents who have bought at least once music DVD over the past year.
- Respondents between 15 and 20 years old are most likely to have bought at least one music DVD (55%) over the past year, although most of these young buyers tended to have only bought one or two DVDs, for an average of 4.7 music DVDs. Older Canadians are more likely to purchase a larger quantity, with an average closer to 6 music DVDs purchased for those over 35 years of age.



Question: B10. How many music DVDs did you buy in the past year?

Base: All respondents (n=2,002)

Note: Respondents who did not buy any music DVDs are not shown in this distribution.

Accessing the Internet

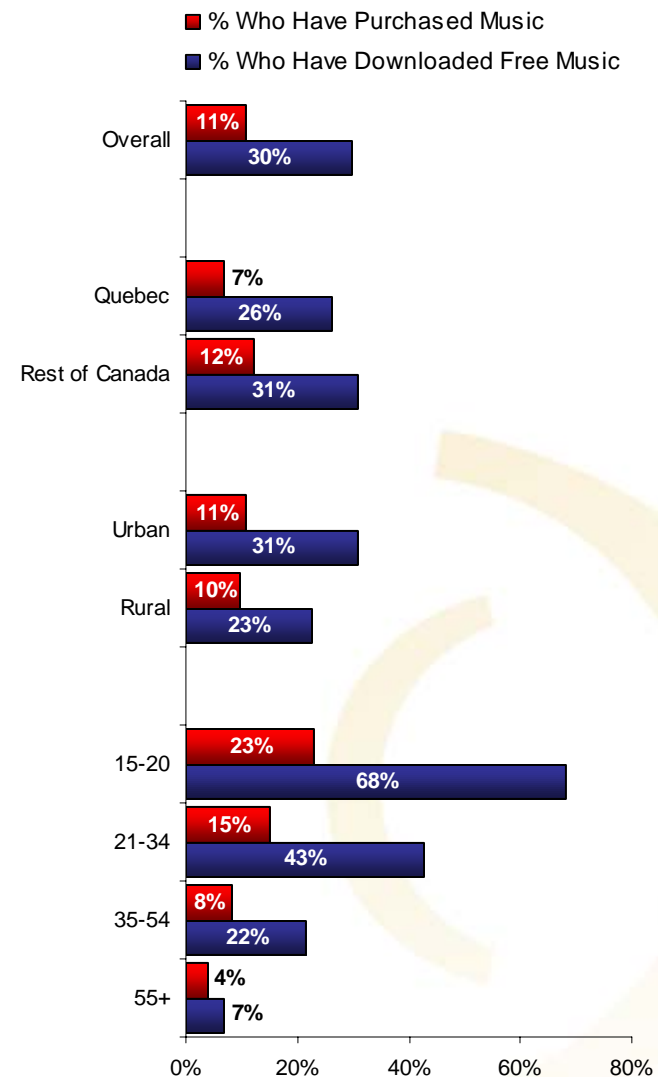
- Overall, 71% of Canadians have access to the Internet from home and 32% can access the Internet from work. Twenty percent indicate that they do not access the Internet at all.
- Overall Internet access is higher among Canadians in the rest of Canada compared to residents of Quebec.
- As well, the likelihood of having access to the Internet decreases with age. While only 2% of Canadians between 15 and 20 indicate they cannot access the Internet, this increases to 14% among those 35 to 54 and spikes to 44% among those over 55 years old.
- Urban residents are more likely than rural residents to have access both at home (74% vs. 64%) and at work (33% vs. 27%), while 26% of rural residents do not have any Internet access (compared to 17% among urban residents).
- Canadians with a higher household income are more likely to have access to the Internet both at home and at work, while those with household incomes under \$40,000 are generally less likely to have access to the Internet.

Access to the Internet	Overall	Quebec	Rest of Canada				15-20	21-34	35-54	55+	Urban	Rural	Household Income			
			Men	Women	<\$40K	\$40K-\$60K							\$60K-\$80K	\$80K+		
Home	71%	65%	73%	74%	69%	91%	80%	76%	50%	74%	64%	53%	69%	81%	92%	
Work	32%	31%	32%	32%	32%	11%	44%	44%	12%	33%	27%	17%	30%	41%	55%	
School	10%	11%	10%	10%	11%	60%	13%	2%	1%	13%	14%	9%	10%	7%	10%	
Friend's house	2%	3%	2%	3%	2%	9%	4%	1%	1%	3%	2%	2%	3%	2%	2%	
Library	4%	3%	4%	3%	4%	7%	4%	3%	2%	4%	3%	5%	2%	3%	2%	
Other	4%	5%	4%	4%	3%	3%	6%	4%	2%	4%	3%	5%	5%	3%	2%	
Don't access the Internet	20%	24%	18%	19%	21%	2%	7%	14%	44%	17%	26%	37%	20%	10%	2%	

Question: B11. From which locations do you access the Internet?
 Base: All respondents (n=2,002)

Purchasing and Downloading Music for Free From the Internet

- Despite the growing popularity of legal services, downloading free music over the Internet is still prevalent, and there is an active cluster of Canadians who download music for free over the Internet. Fully 30% of Canadians with Internet access admitted to downloading music tracks for free last year.
- Still, legal services are growing in Canada and Canadians, especially those who are young and are more comfortable with new technologies, are buying more music over the Internet. Last year, 11% of Canadians purchased songs over the Internet.
- Across all segments, downloading music for free is a more common activity over purchasing music on-line. But despite the differences in magnitude, the trends among the different segments remain similar.
- Residents in the rest of Canada download more music than residents of Quebec, whether it is purchased or downloaded for free.
- Urban and rural residents purchase about the same amount of music; however, urban residents are more active with free downloading of music (31% vs. 23%).
- Looking at age, 15 to 20 year olds are, by far, the most active at downloading music. Predictably, the likelihood of downloading music, either purchased or for free, significantly decreases with age.



Question: B12. How many songs did you *purchase* from the Internet last year?
Question: B14. How many songs did you *download for free* from the Internet last year?
Base: B11. Has access the Internet, (n=1,602)

Average Number of Songs Purchased and Downloaded for Free over the Last Year

- The 11% of Canadians who purchased music on-line bought an average of 33 songs over the last year, with approximately one-third of these being songs by Canadian artists. Canadians downloading music for free double these numbers, downloading on average a total of 61 songs over the past year, 22 of them by Canadian artists.
- The number of songs purchased by residents of Quebec is significantly less than the number purchased by residents living in the rest of Canada (25 vs. 35 songs purchased). Fifteen to thirty-four year olds purchased and downloaded for free more songs than older Canadians.

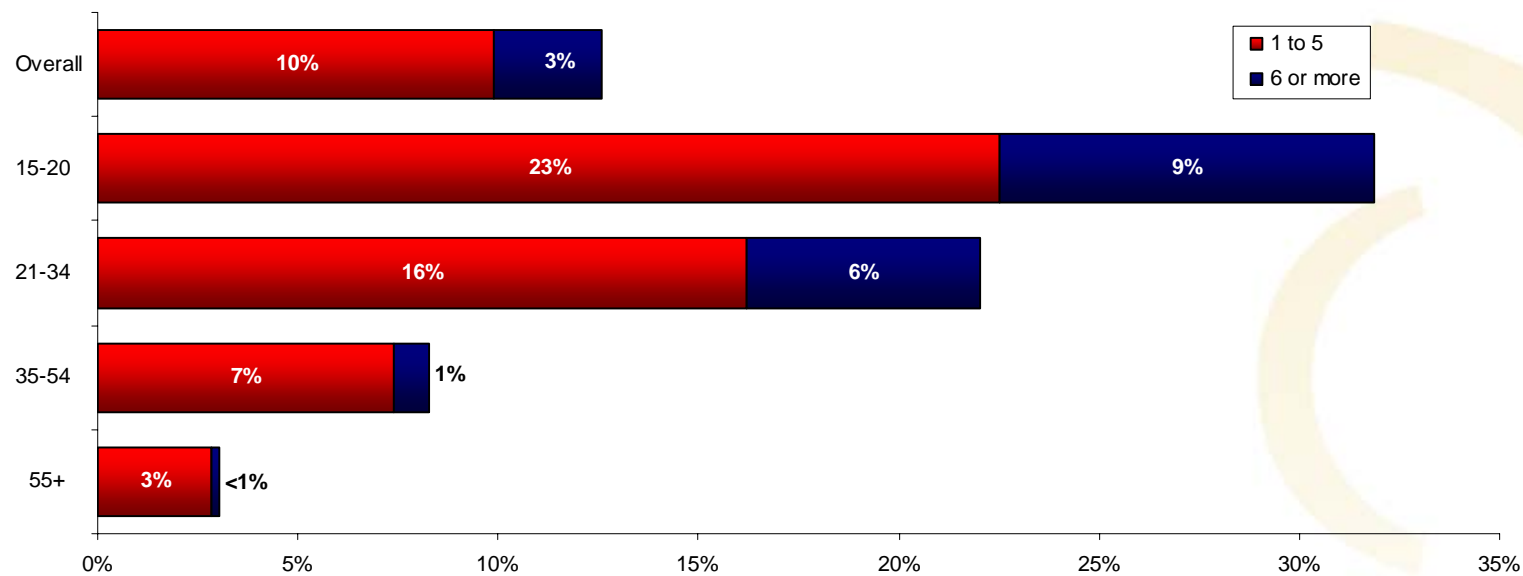
Population Segments	# Songs Purchased	# Canadian Songs Purchased	# Downloaded for Free	# Canadian Downloaded for Free
Overall	33.4	12.0	60.9	22.1
Quebec	24.6	7.9	58.4	17.9
Rest of Canada	34.9	12.7	61.6	23.2
Men	32.8	11.5	57.5	22.9
Women	34.2	12.7	66.0	20.9
15-20	49.2	18.2	72.1	25.1
21-34	38.2	14.3	68.0	25.4
35-54	20.3	5.7	46.4	16.4
55+	9.6	6.5	30.3	11.0
<\$40K	42.7	13.2	68.2	22.0
\$40K-\$60K	33.8	11.3	48.3	18.8
\$60K-\$80K	29.9	10.8	60.2	22.2
\$80K+	33.1	13.4	65.7	28.3
Visible Minority	55.9	19.9	66.8	23.2
Non-Visible Minority	30.4	11.1	60.0	22.6
Urban	32.7	11.9	61.5	23.2
Rural	38.5	12.3	57.3	17.4

Question: B12. How many songs did you purchase from the Internet last year?
 B13. How many of these songs were by Canadian artists?
 Base: Purchased from the Internet (n= 182)

B14. How many songs did you download for free from the Internet last year?
 B15. How many of these songs were by Canadian artists?
 Base: Downloaded free music from the Internet (n= 536)

Ringtone Purchases

- Ringtones are a recent phenomenon among cell phone users, allowing subscribers to customize their wireless experience with their favourite music. Respondents who indicated that they own or have access to a cell phone were asked to state the number of ringtone purchases they had made over the last year. Eighty-seven percent of cell phone users did not purchase any ringtones and among those who did, they tended to purchase between 1 and 5 ringtones.
- Overall, 13% of Canadians who own a cell phone purchased at least one ringtone over the past year.



Question: B16. How many ringtones did you purchase in the past year for your cell phone?
Base: B3f=1, has access to a cell phone, (n=1,250)
Note: Respondents who did not buy any music DVDs are not shown in this distribution.

Music Discovery

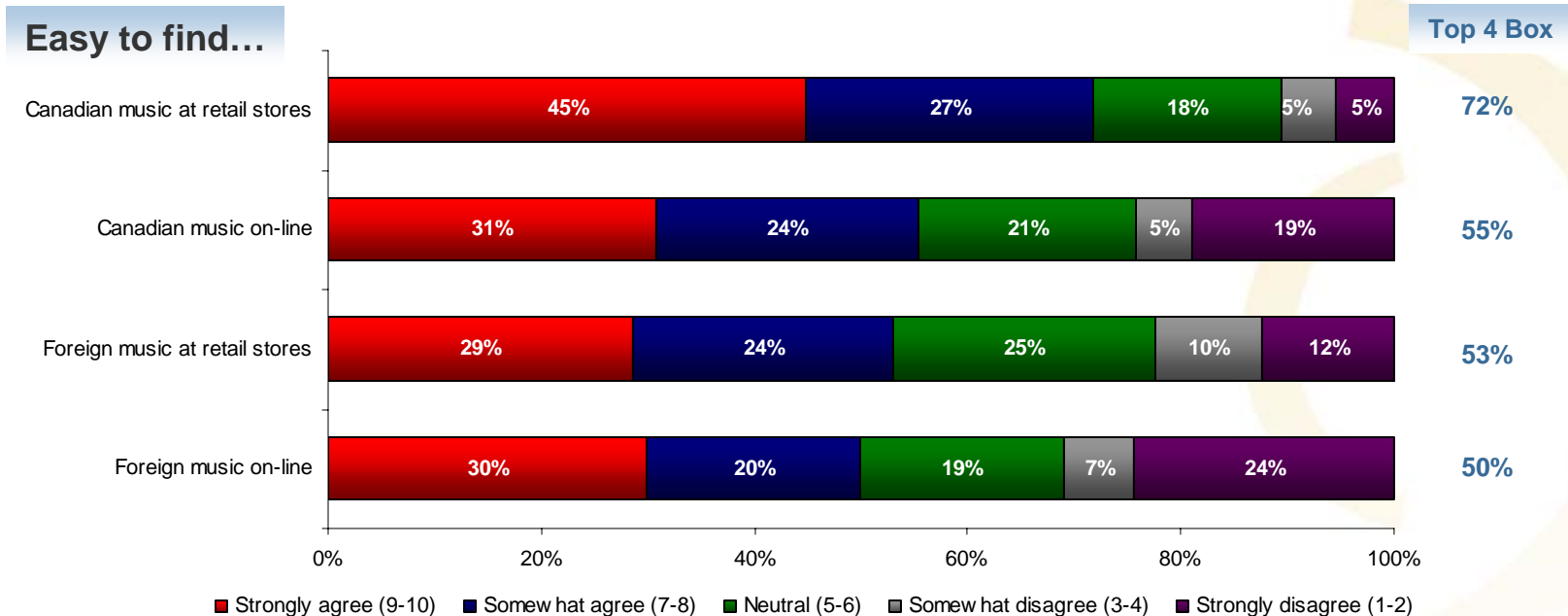
- With the exception of young Canadians, about 75% of respondents discover new music on the radio. Word-of-mouth and the television were also considered important channels through which Canadians discover new music.
- No significant differences exist between Quebec and the rest of Canada.
- Women are more likely than men to discover new music through television (38% vs. 29%), while men are more likely than women to discover new music through the Internet (14% vs. 7%).
- Only half of Canadians between 15 and 20 discover new music over the radio – their primary source seems to be through word-of-mouth. Furthermore, this age group is significantly more likely than all other age groups to discover new music through television and the Internet.

How Canadians Discover New Music	Overall	Quebec	Rest of Canada	Men	Women	15-20	21-34	35-54	55+
Radio	75%	76%	74%	74%	76%	50%	75%	80%	77%
Word-of-mouth	37%	34%	38%	36%	39%	67%	46%	33%	25%
TV	34%	37%	33%	29%	38%	48%	32%	27%	38%
Internet	11%	9%	11%	14%	7%	27%	20%	7%	2%
Print/Advertising	11%	12%	10%	10%	11%	9%	13%	9%	12%
Concerts	4%	4%	4%	3%	4%	6%	2%	4%	5%
In stores	2%	2%	2%	2%	2%	1%	2%	3%	1%
Movies	2%	1%	2%	2%	2%	3%	1%	2%	2%
Other	6%	6%	5%	6%	5%	4%	6%	6%	5%

Question: B17. How do you generally discover new music?
 Base: All respondents (n=2,002)

Access to Music at Retail Stores and On-line

- Seventy-two percent of Canadians agree that they can easily find Canadian music at retail stores (in other words a score of 7 or higher on a 10-point scale). More Canadians agree that they can easily find Canadian music at retail stores than they can on-line, to which a much lower 55% of Canadians agree.
- In terms of finding foreign music, similar proportions of Canadians agree that it is just as easy to find at retail stores (53%) as it is to find on-line (50%). There is a significant difference in terms of those who disagree (in other words, give a score of 4 or less on a 10-point scale), with 22% of Canadians disagreeing that it is easy to find foreign music at retail stores, as compared to 31% who disagree that foreign music is easy to find on-line.
- As seen previously, 83% of Canadians typically buy their music in a store, and only 4% buy their music on-line. In time, as Canadians conduct more on-line shopping which includes purchasing music, the proportion of the population saying that music is easy to find on-line may grow.



Question: B18. Please state your level of agreement with the following statements.
 Base: 18a/18c. Total respondents (n=2,002)
 Base: 18a/18c. Has access to the internet (B11, n=1,615)

Access to Music at Retail Stores and On-line

- Canadians agree that when it comes to purchasing Canadian music, they can easily find it in stores. Quebec residents are more likely to agree with this statement than the rest of Canada (82% vs. 68%). As well, respondents aged 21 through 54 (77%) are more likely to agree, when compared to those aged 15 to 20 (68%) and those aged 55 and over (62%). Also, while 76% of urban residents can easily find Canadian music in stores, this decreases to 68% among those living in rural areas.
- Sixty-three percent of Quebec residents agree that it is easy to find foreign music at retail stores, as compared to 50% among residents in the rest of Canada. This can be tied back to where Canadians are most likely to purchase their music – it was noted that 72% of Quebec residents primarily buying their music in retail stores, as compared to 50% in the rest of Canada.
- When it comes to purchasing music on-line, 55% agree that it is easy to find Canadian music on-line and 50% agree that it is easy to find foreign music on-line. No significant regional or gender differences exist. However, younger Canadians find it much easier to find both Canadian and foreign music on-line than do older Canadians (see table below for details).

Ease of Finding Music in Stores and On-line (Top Four Box Summary)	Overall	Quebec	Rest of Canada	Men	Women	15-20	21-34	35-54	55+	Urban	Rural
Canadian music at retail stores	72%	82%	68%	71%	73%	68%	78%	76%	62%	76%	68%
Canadian music on-line	55%	50%	57%	57%	53%	65%	62%	54%	32%	56%	53%
Foreign music at retail stores	53%	63%	50%	51%	55%	44%	54%	57%	50%	55%	51%
Foreign music on-line	50%	45%	51%	53%	46%	58%	57%	49%	29%	51%	45%

Question: B18. Please state your level of agreement with the following statements..

Base: 18a/18c. Total respondents (n=2,002)

Base: 18a/18c. Has access to the internet (B11, n=1,615)

Live Music Performances



Attendance at Live Music Performances

- Canadians were asked to indicate their live music event attendance over the past year. All respondents were asked for the total number of live music performances they had attended. Only those who indicate that they had attended at least one live music performance were asked to specify the total number of live Canadian music performances. The results relating to performances by Canadian artists have been recalibrated over the base of all respondents to reflect the number of live Canadian music performances attended as a percentage of all Canadians.
- For these questions, where a range is used as a method to summarize responses (e.g. 1 to 5 live music performances attended over the past year), a midpoint is used so that it is possible to estimate the average (e.g. the average number of live music performances attended over the past year).
- Forty-six percent of respondents have been to 1 to 5 performances, and 22% have been to six or more performances. On average, Quebec residents attend fewer live music performances than do residents from the rest of Canada (3.3 vs. 4.2 performances).
- Forty-five percent of Canadians have seen between 1 and 5 live music performances by Canadian artists, and 14% have seen 6 or more, creating an average of 3 live Canadian performances over the past year. This average is lower for Quebec residents, seeing an average of 2.6 live music performances by Canadian artists, as compared to 3.2 attended by the rest of Canada.
- These results also suggest that about three-quarters of performances attended over the past year are performances by Canadian artists (3.1 vs. 4.0 overall).

Total Live Music Performances	Overall	Quebec	Rest of Canada
None	33%	37%	31%
1 to 5	46%	47%	46%
6 to 10	11%	9%	12%
11 to 15	5%	4%	5%
16 or more	6%	4%	6%
Average	4.0	3.3	4.2

Question: B19. How many live music performances did you attend over the past year?
Base: Total respondents (n=2,002)

Total Live Canadian Music Performances	Overall	Quebec	Rest of Canada
None	40%	43%	39%
1 to 5	45%	46%	44%
6 to 10	8%	6%	9%
11 to 15	3%	2%	3%
16 or more	3%	2%	3%
Average	3.1	2.6	3.2

Question: B20. How many of these live performances were by Canadian artists?
Base = Total respondents (n=2,002)

Live Music Performance Attendance: Canadian Artists

- The adjacent table demonstrates the average total number of live performances and, of these, live performances by Canadian artists, broken down by various demographic segments. As stated previously, residents in Quebec are less likely to attend live music performances than are residents from the rest of Canada.
- No significant differences between gender are seen; however, differences among age groups are found, with ages 15 to 34 attending, on average, a total of 5 live performances over the past year, as compared to 3.6 seen by the older respondents.
- Higher education and higher income are also predictors of live music performance attendance.

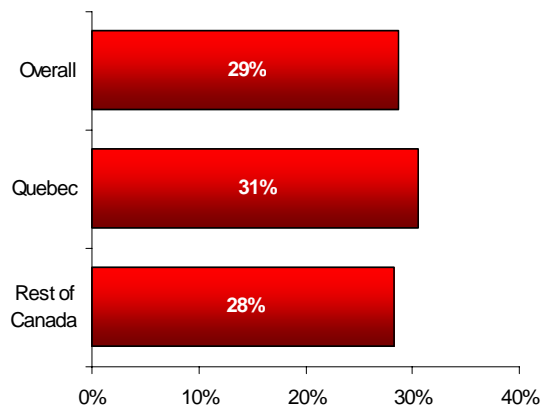
Population Segment	Total # of Live Music Performances Attended	Total # of Live Canadian Music Performances Attended
Overall	4.0	3.1
Quebec	3.3	2.6
Rest of Canada	4.2	3.2
Men	4.1	3.2
Women	3.9	2.9
15-20	5.3	3.7
21-34	4.6	3.4
35-54	3.8	3.1
55+	3.3	2.6
HS or less	3.2	2.5
Some Coll/Univ.	4.6	3.4
Completed Coll/Univ.	4.1	3.1
Graduate	5.4	4.5
<\$40K	3.3	2.6
\$40K-\$60K	3.9	2.9
\$60K-\$80K	4.4	3.6
\$80K+	5.1	3.8
Visible Minority	3.6	2.5
Non-Visible Minority	4.2	3.3
Urban	4.0	3.1
Rural	3.7	2.9

Question: B19. How many live music performances did you attend over the past year?
 Question: B20. How many of these live performances were by Canadian artists?
 Base = Total respondents (n=2,002)

Live Music Performance Attendance: Purchase Summary

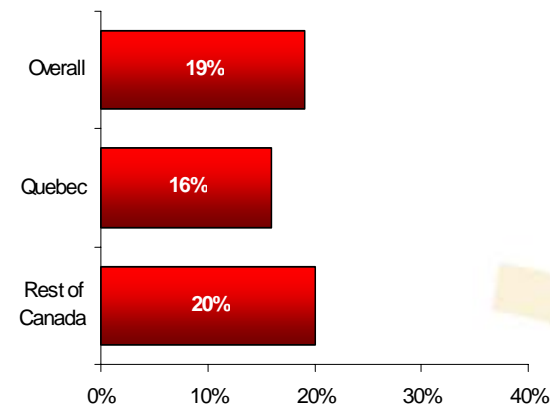
- Respondents were asked about the purchases that they made while attending these live music performances. Twenty-nine percent of those who attended live performances bought CDs or music DVDs and 19% bought other concert related merchandise. No significant differences are seen by region.

Purchased CDs or Music DVDs



Question: B21a. Did you purchase CDs or music DVDs at these shows?
Base: B19. Attended live performance (n=1,359)

Purchased Other Concert Merchandise



Question: B21b. Did you purchase other concert-related merchandise at these shows?
Base: B19. Attended live performance (n=1,359)

- When asked how much was spent on average per show on CDs or music DVDs, the average amount spent was \$25. A somewhat larger amount is spent on other concert-related merchandise, with an overall average of \$29.

Total Spent on CDs or Music DVDs	Overall	Quebec	Rest of Canada
Less than \$20	39%	41%	39%
\$20 to \$40	51%	50%	51%
More than \$40	10%	9%	10%
Average:	\$25	\$25	\$25

Question: B22a. On average, how much did you spend per show on CDs or music DVDs?
Base: B21a Made purchase (n=389)

Total Spent on Other Merchandise	Overall	Quebec	Rest of Canada
Less than \$20	35%	50%	31%
\$20 to \$40	44%	35%	46%
More than \$40	21%	15%	23%
Average:	\$29	\$24	\$30

Question: B22b. How much did you spend on other concert merchandise?
Base: B21b Made purchase (n=270)

Live Performance Attendance: Purchase Summary

- The adjacent table reveals average amounts spent per live music performance attended, including the amount spent on CDs or music DVDs, as well as on other concert-related merchandise. Not many differences exist between groups, with ranges usually spanning only a few dollars.

Demographic	Total Spent on CDs or Music DVDs	Total Spent on Other Merchandise
	Quebec	\$25
Rest of Canada	\$25	\$30
Men	\$24	\$31
Women	\$26	\$28
15-20	\$26	\$25
21-34	\$26	\$32
35-54	\$24	\$31
55+	\$26	\$25
HS or less	\$24	\$28
Some Coll/Univ.	\$27	\$32
Completed Coll/Univ.	\$25	\$29
Graduate	\$25	\$23
<\$40K	\$28	\$27
\$40K-\$60K	\$24	\$28
\$60K-\$80K	\$25	\$34
\$80K+	\$24	\$30
Visible Minority	\$30	\$27
Non-Visible Minority	\$25	\$30
Urban	\$26	\$29
Rural	\$24	\$31

Question: B22. On average, how much did you spend per show?

Base: B21a Music CDs or DVDs (n=389)

Base: B21b Other concert-related merchandise (n=270)

Conclusions

Conclusions

Canadian Film Industry

- The television is a primary means of watching movies for Canadians, whether it is through a conventional or specialty television channel or through a channel dedicated to movies. Renting movies and watching movies from a personal collection are also fairly common activities for over half the population.
- Going to a movie theatre continues to be seen as an expensive way to view movies. In fact, the importance of price as a factor discouraging people from going to the movies more often has increased since 2001. This growing perception may have incited a number of movie theatre operators to decrease admission prices over the past few years. The increase in the importance of cost may also be related to quality considerations. Although this research did not ask Canadians if they feel that movies in general have increased or decreased in quality, Canadians will feel that movies are overpriced if they do not perceive value for their money.
- The top three movie genre preferences of the Canadian population have shifted somewhat since 1998. Comedies, by far the most preferred type of movie, and dramas remain up top in 2005, with spy or thriller movies and action films close behind.
- These preferences help explain awareness and viewership rankings of the Canadian movies featured in this research: two of the top three movies are comedies.
- The observations from the various other Canadian films respondents were asked to list reveals that Canadians are not entirely consistent in their understanding of what is considered a “Canadian film”. Two of the titles they chose were not Canadian, perhaps relating to some confusion regarding whether there was Canadian key creative content was involved, or the movie was shot in Canada.

Conclusions

Canadian Film Industry

- Canadians seem to firmly believe that Canadian movies should be seen in Canadian movie theatres and on Canadian television. They are however less convinced that Canadian movies are readily available in movie theatres or in video stores.
- Canadians also seem to have strong opinions on the promotion of Canadian movies. A strong proportion of Canadians feel that Canadian movies should be exported and promoted in other countries and many believe that more people would watch Canadian movies if they were promoted and advertised better. Clearly, these results align with the public's perception that Canadian movies are not readily available in movie theatres or video stores. Furthermore, the Canadian public may also grasp the notion, if Hollywood can be seen as an example, that the movie industry is strongly rooted in promotion.
- There is also an important consensus around a perceived increase in quality of Canadian productions and that Canadians clearly see their own actors, directors and productions at par with those in other countries. Despite these signs of support for the Canadian industry, there remain 3 in 10 who agree that American movies are better made than movies in other countries.

Conclusions

Canadian Music Industry

- Canadians, by and large, believe that Canadian music can hold its own on the international stage. The quality of music by Canadian artists is seen by 93% of the general population to be either of equal or better quality than music by foreign artists.
- Canadians listen to almost 19 hours of music per week, which translates to just over two and a half hours of music each day, most of which is either on the radio or on CDs, mp3s or cassettes. They estimate that approximately 30% of their music is by Canadian artists and their favourite type of music is undoubtedly rock music (which includes soft, hard and classic rock).
- The diversity of musical taste is reflective of Canada's diverse multicultural population. While most of the music is in English, 10% of the time, Canadians are either listening to French music or instrumental and 5% of the time is spent listening to music in other languages.
- Despite the continuing growth in on-line shopping, Canadians still typically resort to “brick and mortar” outlets when purchasing their CDs. For the time being, the Internet remains a secondary purchasing channel.
- Despite the growing popularity of legal services, downloading music for free over the Internet is still prevalent. Predictably, the likelihood of downloading music, either purchased or free, significantly decreases with age. Not only is free downloading three times more common than purchasing, the actual volume of tracks downloaded for free is much higher on average. It is estimated that about one in three tracks downloaded from the Internet are by Canadian artists.

Conclusions

Canadian Music Industry

- Canadians are much more likely to agree that Canadian music is easily found in stores as compared to on-line. In time, as Canadians conduct more on-line shopping which includes purchasing music, the proportion of the population saying that music is easy to find on-line is likely to grow.
- Many Canadians attend live music performances, of which it is estimated that three-quarters are by Canadian performers. Furthermore, these performances are important outlets for CDs, DVDs and other concert-related merchandise. About three in ten concert-goers buy CDs and music DVDs, spending on average \$25.

Appendix A: English Questionnaire

INTRODUCTION/SCREENER

Int1. Good evening/ afternoon, my name is _____ and I am calling from Decima Research on behalf of the Government of Canada. We are conducting a national survey to obtain Canadians' opinions on movies and music. Your household was randomly selected and all responses will be kept strictly confidential and analyzed in the aggregate. Would you have time to help us out this evening?

READ ONLY IF ASKED FOR LENGTH OF SURVEY: Depending on the answers to your questions, the survey will take between 15 and 20 minutes of your time.

Yes (CONTINUE WITH SURVEY)

No (THANK AND TERMINATE)

Int2. Is there anyone in your household currently between the ages of 15 and 19 inclusive? We are looking to complete surveys with young Canadians to gain their unique insights - would it be possible to complete the survey with this individual?

Nobody of this age	1	CONTINUE WITH ORIGINAL RESPONDENT
Speaking	2	GO TO MAIN SURVEY
Gets the person	3	REPEAT INTRO
Refusal	4	THANK AND TERMINATE

PROGRAMMER NOTE: RANDOMIZE SECTIONS A AND B

SECTION A: CANADIAN FEATURE FILM INDUSTRY

{READ} The following group of questions relate to movies.

A1 How often do you...

{READ LIST OF RESPONSES. REPEAT FOR FIRST TWO QUESTIONS THEN ONLY WHEN ASKED}

- Never 1
- Once a year 2
- Once every 6 months 3
- Once every 3 months 4
- Monthly 5
- Weekly 6
- More than once a week 7
- Don't know/Refuse 9

- a) Watch movies in a theatre or drive-in
- b) Rent movies
- c) Buy movies
- d) Watch a movie channel, in other words, a channel that features ONLY movies
- e) Watch movies on a regular television channel, in other words, a channel that features various types of programming in addition to movies
- f) Use a video-on-demand service (READ IF ASKED: Video-on-demand, or VOD, is a pay-per-view television service in which a viewer can order a program from a menu and have it delivered instantly to the television set, typically with the ability to pause, rewind, etc.)
- g) Watch movies from your own collection
- h) Download and watch movies from the Internet

{SKIP A2 IF A1a = 7}

A2 What factors influence your decision NOT to attend more movies at the movie theatre? Is there anything else?

{DO NOT READ LIST. ACCEPT ALL THAT APPLY}

- Don't like what's playing 1
- Too expensive 2
- No time 3
- Show times are not convenient 4
- No theatre in my area 5
- Not accessible for the handicapped (mobility, sight and hearing impaired) 6
- Run in theatre too short 7
- It will be out on video soon anyway 8
- Other (PLEASE SPECIFY) 77
- Don't know/Refuse 99

{ SKIP A3 IF A1a=1 }

A3 On a scale from 1 to 10, where 1 is “No influence at all” and 10 is “Significant influence”, please rate the level of influence each of the following have on your movie selection decision at the movie theatre:

- No influence at all 1 {REPEAT SCALE AS NEEDED}
- Significant influence..... 10
- Don't know/refuse to answer99 (DO NOT READ)

{RANDOMIZE LIST}

- a) Commercials seen on television
- b) Advertising from sources other than television, for example, newspapers, radio, billboards, and the Internet
- c) Critical acclaim or awards
- d) Word-of-mouth
- e) Previews at the theatre, also known as trailers
- f) Actors in the movie
- g) Story
- h) Country of origin of the film
- i) Director of the movie
- j) Interviews or news stories about the film

{SKIP A4 and A5 IF A1b=1}

A4 What affects your choice when deciding which movies to rent? {PROBE} Is there anything else?

{DO NOT READ LIST. ACCEPT ALL THAT APPLY}

- Advertising 1
- Critical acclaim or awards 2
- Word-of-mouth 3
- Previews at the theatre, also known as trailers.... 4
- Actors in the movie 5
- Story 6
- Special FX 7
- Country of origin of the film 8
- Director of the movie 9
- Commercials seen on television 10
- Interviews or news stories about the film 11
- The picture on the cover and the blurb on the back of the rental box look interesting 12
- The kids wanted the movie..... 13
- It's on the “new release” shelf and is therefore easy to find at the store 14
- Other (please specify) 77
- Don't know/refuse..... 99

A5. Most often do you rent a movie...

{READ LIST}

- Instead of seeing the same movie in a theatre 1
- In addition to seeing the same movie in a theatre 2
- Don't know/refuse..... 9 {DO NOT READ}

{ SKIP A6 AND A7 IF A1c=1}

A6 What affects your choice when deciding which movies to purchase? {PROBE} Is there anything else?
{DO NOT READ LIST. ACCEPT ALL THAT APPLY}

Advertising.....	1
Critical acclaim or awards	2
Word-of-mouth	3
Previews at the theatre (trailers)	4
Actors	5
Story	6
Special FX	7
Country of origin of the film	8
Director	9
Commercials seen on TV	10
Interviews or news stories about the film	11
The picture on the cover and the blurb on the back of the rental box look interesting	12
The kids wanted the movie.....	13
I like the movie so much I want to own it.....	14
I am a movie collector and I love owning movies in general	15
Other (please specify)	77
Don't know/refuse.....	99

A7. Most often do you purchase a movie...

{READ LIST}

Instead of seeing the same movie in a theatre	1
In addition to seeing the same movie in a theatre	2
Don't know/refuse.....	9 {DO NOT READ}

A8 On a scale from 1 to 10, where 1 is "Not at all interested" and 10 is "Extremely interested", please rate your level of interest in the following types of movies:

Not at all interested	1 {REPEAT SCALE AS NEEDED}
Extremely interested.....	10
Not applicable/refuse to answer.....	99

{RANDOMIZE LIST}

- a) Comedy
- b) Drama
- c) Action
- d) Spy or thriller
- e) Animated
- f) Family or Children's
- g) Musical
- h) Sci-Fi
- i) Horror
- j) Film D'auteur or Art film
- k) Foreign film

A9 FOR EACH OF THE FOLLOWING MOVIES ASK:

- I. ALL RESPONDENTS
- II. IF YES TO (I) ; IF NO THEN MOVE TO NEXT MOVIE
- III. IF YES TO (II) ; IF NO THEN MOVE TO NEXT MOVIE

A9I Have you heard of the movie titled:

- Yes 1 (ask II)
- No 2 (move to next movie)

{RANDOMIZE LIST}

- a) Séraphin : Heart of Stone (FRENCH IF NEEDED: Séraphin – un homme et son péché)
- b) Elvis Gratton XXX (FRENCH IF NEEDED: Elvis Gratton XXX: La Vengeance d'Elvis Wong)
- c) Resident Evil: Apocalypse
- d) The Barbarian Invasions (FRENCH IF NEEDED: les Invasion Barbares)
- e) Being Julia
- f) Bollywood Hollywood
- g) Ma vie en cinémascope
- h) Seducing Dr. Lewis (FRENCH IF NEEDED: La Grande Seduction)
- i) Mambo Italiano
- j) Ginger Snaps
- k) The Blue Butterfly (FRENCH IF NEEDED: Le papillon bleu)
- l) Men with Brooms (FRENCH IF NEEDED: Quatre gars et un balai)
- m) The Corporation
- n) Les Boys III
- o) Ryan
- p) 8:17pm Darling Street (FRENCH IF NEEDED: 20h17 rue Darling)
- q) Going the Distance

A9II Have you seen this movie?

- Yes 1 (ask III)
- No 2 (move to next movie)
- Do not recall/refuse 9 (DO NOT READ) (move to next movie)

A9III Where did you first see the movie?

{DO NOT READ LIST}

- Theatre1
- Video or DVD2
- TV3
- Download4
- Airplane5
- Film Festival6
- Other (please specify)77
- Don't know/refuse.....99

{SKIP A10a-c IF A1a = 1}

A10a Have you seen any other Canadian feature films over the past year? IF NEEDED: By Canadian feature film, we mean films that are produced by Canadians, including Quebecois films.

- Yes1 (ASK A10b)
- No2 (MOVE TO A11)
- Do not recall9 (DO NOT READ) (MOVE TO A11)

A10b What movie(s) was it (were they)? (Code 1 – 98)

Response 1: _____

Response 2: _____

Response 3: _____

Don't know/refuse.....99 (SKIP TO A11)

A10c Where did you first see the movie? (Ask for each response in A10b)

{DO NOT READ LIST. ACCEPT ALL THAT APPLY}

Theatre1

Video or DVD2

TV3

Download4

Airplane5

Film Festival6

Other (please specify)77

Don't know/refuse.....99 (DO NOT READ)

A11 On a scale from 1 to 10, where 1 is “Strongly disagree” and 10 is “Strongly agree”, please rate your level of agreement with each of the following statements:

Strongly disagree.....1 {REPEAT SCALE AS NEEDED}

Strongly agree10

No opinion/refuse to answer.....99 (DO NOT READ)

{RANDOMIZE LIST}

- a) More people would watch Canadian movies if they were promoted and advertised better.
- b) The acting, directing and production quality of Canadian movies is as good as movies made in other countries.
- c) I think it is important that Canadian movies can be seen in movie theatres in Canada
- d) I think it is important that Canadian movies can be seen on Canadian TV.
- e) I think it is important that Canadian movies are exported and promoted in other countries.
- f) American movies are better made than movies made in other countries.
- g) Over the last couple of years, I think that the Canadian movie industry has begun to make better films.
- h) Most Canadian films are not available in movie theatres.
- i) Most Canadian films are not available in video stores.
- j) The stories in Canadian movies relate to me.

SKIP A12a AND A12bi OR A12bii IF A1a-h = 1}

A12a What percent of the movies you watch in an average year are in English, what percent are in French and what percent are other types of movies including subtitled, dubbed and foreign language films?

{READ ALL OPTIONS AT ONCE THEN HAVE RESPONDENT ASSIGN % TO EACH SO THAT IT ALL ADDS TO 100%. PROBE FOR APPROXIMATION}

English language..... %

French language %

Other (including subtitled, dubbed and foreign language films – DO NOT SPECIFY) ____%

Don't know/refuse to answer999 {DO NOT READ}

PROGRAMMER NOTE: TOTAL MUST SUM TO 100% UNLESS RESPONSE IS DK/REFUSE

A12bi. [ENGLISH RESPONDENTS] When you are interested in seeing a movie that was originally produced in FRENCH, do you generally prefer to see it...

- | | |
|--------------------------------|-----------------|
| In the original French version | 1 |
| Subtitled in English, or, | 2 |
| Dubbed in English | 3 |
| No preference | 4 {DO NOT READ} |
| Don't know/refuse | 9 {DO NOT READ} |

A12bii. [FRENCH RESPONDENTS] When you are interested in seeing a movie that was originally produced in ENGLISH, do you generally prefer to see it...

- | | |
|---------------------------------|-----------------|
| In the original English version | 1 |
| Subtitled in French, or, | 2 |
| Dubbed in French | 3 |
| No preference | 4 {DO NOT READ} |
| Don't know/refuse | 9 {DO NOT READ} |

SECTION B: MUSIC CONSUMPTION

{READ} The following group of questions relate to music.

LISTENING HABITS

B1 How many hours in an average week do you spend listening to music on (REPEAT THIS INTRO FOR EACH ITEM LISTED):

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

{IF NECESSARY REITERATE: Please remember, this amount of time is spent listening to music only.}

- None1
- Less than 1 hour.....2
- 1 to 5 hours.....3
- 6 to 10 hours.....4
- 11 to 25 hours.....5
- More than 25 hours6
- Don't know/refuse to answer9 {DO NOT READ}

{RANDOMIZE LIST}

- a) CDs, mp3s or cassettes
- b) The radio
- c) The Internet
- d) Television

{IF B1a-d =1, THEN SKIP TO B3}

B2 What percentage of your total music listening is spent listening to music by Canadian artists?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1
- Less than 10%.....2
- 10-25%3
- 26-50%4
- 51-75%5
- 76-100%6
- Don't know/refuse to answer9 {DO NOT READ}

B3 Do you own, or have access to, any of the following items, either at home, at work or elsewhere?

- Yes 1
- No 2
- DK/Refuse 9 {DO NOT READ}

{RANDOMIZE LIST}

- a) Computer
- b) CD burner
- c) Portable digital music player or portable mp3 player
- d) DVD player
- e) DVD burner
- f) Cell phone

{IF B1a-d =1, THEN SKIP TO B6}

B4 On a scale from 1 to 10, where 1 is “Not at all interested” and 10 is “Extremely interested” please indicate the extent to which you are interested in the following types of music:

Not at all interested..... 1 {REPEAT SCALE AS NEEDED}
Extremely interested..... 10
Not applicable/refuse to answer99 {DO NOT READ}

{RANDOMIZE LIST}

- a) Country
- b) Rock, including soft, hard and classic rock
- c) Current Hits or Pop music
- d) Electronica
- e) Classical or Opera
- f) Hip-Hop
- g) R&B
- h) Dance
- i) Jazz or Blues
- j) World
- k) Folk

B5 What percent of the music that you listen to is in English, what percent is in French, what percent is instrumental and what percent is music in other languages?

{READ ALL OPTIONS AT ONCE THEN HAVE RESPONDENT ASSIGN % TO EACH SO THAT IT ALL ADDS TO 100%. PROBE FOR APPROXIMATION.}

English language....._%
French language_%
Instrumental....._%
Other language (specify)....._%
Don't know/refuse to answer999 {DO NOT READ}

PROGRAMMER NOTE: TOTAL MUST SUM TO 100% UNLESS RESPONSE IS DK/REFUSE

B6 On a scale from 1 to 10, where 1 is “not as good”, 5 is “equal” and 10 is “much better”, how would you rate the quality of music by Canadian artists as compared to foreign artists.

Not as good 1
Equal5
Much better10
No opinion/refuse to answer99 (DO NOT READ)

PURCHASING

{IF B1a-d =1, THEN SKIP TO B10}

B7 How many music CDs did you buy in the past year, either for your own use or for someone else?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1 {SKIP TO B9a}
- 1 to 52
- 6 to 10.....3
- 11 to 20.....4
- 21 to 30.....5
- More than 306
- Don't know/refuse to answer.....9 (DO NOT READ) (SKIP TO B9a)

B8 How many of these music CDs were by Canadian artists?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1
- 1 to 52
- 6 to 10.....3
- 11 to 20.....4
- 21 to 30.....5
- More than 306
- Don't know/refuse to answer.....9 (DO NOT READ)

B9a Where do you typically buy your music CDs?

{DO NOT READ LIST. SELECT MOST COMMON LOCATION}

- Traditional Retail Music Store (HMV, Virgin, Archambault, Music World) 1
- Big Box (Wal-Mart, Best Buy, Future Shop, CostCo) 2
- On-line3
- Concerts or live performances4
- I do not buy music CDs5
- Other (please specify)77
- Don't know/refuse to answer99

B9b Where else do you buy your music CDs?

{DO NOT READ LIST. SELECT ALL THAT APPLY}

- Traditional Retail Music Store (HMV, Virgin, Archambault, Music World) 1
- Big Box (Wal-Mart, Best Buy, Future Shop, CostCo) 2
- On-line3
- Concerts or live performances4
- I do not buy music CDs5
- Other (please specify)77
- Don't know/refuse to answer99

B10 How many music DVDs did you buy in the past year, either for yourself or for someone else?

{NOTE TO INTERVIEWERS: MAKE SURE RESPONDENT REFERS TO MUSIC DVDs AND NOT MOVIES, TV SERIES, ETC.}

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1
- 1 to 22
- 3 to 53
- 6 to 10.....4
- 11 to 15.....5
- More than 156
- Don't know/refuse to answer.....9 (DO NOT READ)

B11 From which locations do you access the Internet?

{DO NOT READ LIST. ACCEPT ALL THAT APPLY}

- Home1
- Work2
- School.....3
- Other (Please specify)77
- Don't access the Internet.....98
- Don't know/refuse to answer99

{IF RESPONDENT ANSWERS "DON'T ACCESS THE INTERNET" TO B11 THEN SKIP TO B16}

{IF B1a-d =1, THEN SKIP TO B16}

B12 How many songs did you purchase from the Internet last year?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1 {SKIP TO B14}
- 1 to 92
- 10 to 50.....3
- 51 to 1004
- More than 1005
- Don't know/refuse to answer.....9 {DO NOT READ} {SKIP TO B14}

B13 How many of these songs were by Canadian artists?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1
- 1 to 92
- 10 to 50.....3
- 51 to 1004
- More than 1005
- Don't know/refuse to answer9 {DO NOT READ}

B14 How many songs did you download for free from the Internet last year?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1 {SKIP TO B16}
- 1 to 92
- 10 to 50.....3
- 51 to 1004
- More than 1005
- Don't know/refuse to answer9 {DO NOT READ} {SKIP TO B16}

B15 How many of these songs were by Canadian artists?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1
- 1 to 92
- 10 to 50.....3
- 51 to 1004
- More than 1005
- Don't know/refuse to answer9 {DO NOT READ}

{ASK B16 IF B3f = 1}

B16 How many music ringtones did you purchase in the past year for your cell phone?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1
- 1 to 52
- 6 to 10.....3
- 11 or more4
- Don't know/refuse to answer9 {DO NOT READ}

B17 How do you generally discover new music?

{DO NOT READ LIST. ACCEPT ALL THAT APPLY}

- Radio1
- TV2
- Concert attendance3
- Advertising.....4
- Word-of-mouth5
- Internet6
- Awards or critical acclaim.....7
- Print, such as newspapers or magazines8
- Other (please specify)77
- Don't know/refuse to answer99

B18 On a scale from 1 to 10, where 1 is “Strongly disagree” and 10 is “Strongly agree”, please rate your level of agreement with each of the following statements:

- Strongly disagree.....1 {REPEAT SCALE AS NEEDED}
- Strongly agree10
- No opinion/refuse to answer.....99 {DO NOT READ}

(RANDOMIZE ITEMS IN BLOCKS OF TWO: A & B together, C & D together)

- a) When I want to purchase music by Canadian artists, I can easily find it in stores.
- b) {ASK ONLY TO RESPONDENTS WITH ONLINE ACCESS AS INDICATED IN B11} When I want to purchase music by Canadian artists, I can easily find it when buying online.
- c) When I want to purchase music by foreign artists, I can easily find it in stores.
- d) {ASK ONLY TO RESPONDENTS WITH ONLINE ACCESS AS INDICATED IN B11} When I want to purchase music by foreign artists, I can easily find it when buying online.

LIVE PERFORMANCE

B19 How many live music performances did you attend over the past year? Please include performances by amateur and professional musicians, singers and bands.

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1 {SKIP TO NEXT SECTION}
- 1 to 52
- 6 to 10.....3
- 11 to 15.....4
- 16 or more5
- Don't know/refuse to answer9 {DO NOT READ}

B20 How many of these live performances were by Canadian artists?

{READ LIST IF NECESSARY. PROBE FOR APPROXIMATION}

- None1
- 1 to 52
- 6 to 10.....3
- 11 to 15.....4
- 16 or more5
- Don't know/refuse to answer9 {DO NOT READ}

B21 Did you purchase any of the following merchandise at these shows?

Yes	1
No	2
DK/Refuse	9 {DO NOT READ}

- a) CDs or music DVDs
- b) Other concert-related merchandise

{ASK B21a IF "YES" IN B20a; ASK B21b IF "YES" IN B20b}

B22 On average, how much did you spend per show on...

Less than \$20	1
\$20 to \$40	2
More than \$40	3
DK/Refuse	9 {DO NOT READ}

- a) CDs or music DVDs
- b) Other concert-related merchandise

SECTION C: DEMOGRAPHICS

I have just a few final questions that will help us to analyze the results...

C1 Please stop me at the age category to which you belong: {READ AND PAUSE AFTER EACH}

- 15 to 20.....1
- 21 to 24.....2
- 25 to 34.....3
- 35 to 44.....4
- 45 to 54.....5
- 55 to 646
- Over 64.....7
- REFUSE.....9 {DO NOT READ}

C2 Please stop me at the highest level of schooling you have attained: {READ AND PAUSE AFTER EACH}

- Some high school.....1
- Completed high school.....2
- Some college, technical school (Quebec: CEGEP)3
- Completed college, technical school (Quebec: CEGEP)4
- Some university.....5
- Graduated university6
- Earned a graduate degree (Masters, Ph.D.)7
- REFUSE.....9 {DO NOT READ}

C3 Including yourself, how many people who live in your household are...?
{DO NOT READ LIST}

Response	Zero	1-8	Not certain/refusal
a) 20 years of age or older	0	1-8	99
b) 15 to 19 years	0	1-8	99
c) 12 to 14 years	0	1-8	99
d) 11 years or younger	0	1-8	99

C4. Do you consider yourself a member of a visible minority by virtue of your race or colour?

- Yes 1
- No 2
- Don't know/refuse 9

C5 Are you an Aboriginal person? (An aboriginal person is a North American Indian or a member of a first nation, a Métis or an Inuit. Members of a First Nation include status, treaty, or registered Indians. North American Indians include non-status and non-registered Indians.)

- Yes 1
- No 2
- Don't know/refuse 9

C6 Please stop me at the category that best reflects the total income earned by all those living in your home? Is it... {READ AND PAUSE AFTER EACH}

- Less than \$20,0001
- Between \$20,000 and \$40,0002
- Between \$40,000 and \$60,0003
- Between \$60,000 and \$80,0004
- Between \$80,000 and \$100,0005
- Between \$100,000 and \$120,0006
- \$120,000 and over7
- REFUSE9 {DO NOT READ}

This concludes the interview. Thank you for taking the time to answer my questions.

C7 CODE GENDER OF RESPONDENT {DO NOT ASK}

- MALE 1
- FEMALE 2

Appendix B: French Questionnaire

INTRODUCTION/SÉLECTION

Int1. Bonsoir/Bonjour, je m'appelle _____ et je vous téléphone du Centre de recherche Décima pour le compte du gouvernement du Canada. Nous effectuons un sondage à l'échelle nationale pour connaître l'opinion des Canadiens et des Canadiennes à l'égard du cinéma et de la musique. Votre foyer a été sélectionné au hasard. Toutes vos réponses demeureront strictement confidentielles et seront analysées sous forme regroupée. Auriez-vous le temps de répondre à ce sondage maintenant?

NE LISEZ QUE SI ON VOUS DEMANDE LA DURÉE DU SONDAGE : Selon vos réponses, répondre au sondage prendra entre 15 et 20 minutes.

Oui (**CONTINUEZ LE SONDAGE**)
Non (**REMERCIEZ ET TERMINEZ**)

Int2. Votre foyer compte-il actuellement une personne âgée de 15 à 19 ans inclusivement? Nous aimerions effectuer ce sondage auprès de jeunes Canadiens et Canadiennes pour connaître leur point de vue bien particulier – serait-il possible d'effectuer le sondage auprès de cette personne?

Il n'y a personne de cet âge	1	CONTINUEZ AVEC LE RÉPONDANT ACTUEL
À l'appareil	2	PASSEZ AU SONDAGE PRINCIPAL
Vous met en communication	3	RÉPÉTEZ L'INTRODUCTION
Refus	4	REMERCIEZ ET TERMINEZ

NOTE AU PROGRAMMEUR : ALTERNEZ LES SECTIONS A ET B

SECTION A : L'INDUSTRIE CINÉMATOGRAPHIQUE CANADIENNE

{LISEZ} Les questions suivantes porteront sur le cinéma.

A1 À quelle fréquence...

{LISEZ LA LISTE DE RÉPONSES. RÉPÉTEZ-LA AUX DEUX PREMIÈRES QUESTIONS ET ENSUITE UNIQUEMENT SI ON VOUS LE DEMANDE}

- Jamais 1
- Une fois par année 2
- Une fois aux 6 mois 3
- Une fois aux 3 mois 4
- Tous les mois 5
- Toutes les semaines 6
- Plus d'une fois par semaine 7
- Ne sait pas/Refuse 9

- a) Allez-vous au cinéma ou au ciné-parc
- b) Louez-vous des films
- c) Achetez-vous des films
- d) Écoutez-vous des films à la télévision diffusés par un réseau de films - en d'autres mots, par un réseau qui ne diffuse QUE des films
- e) Écoutez-vous des films à la télévision diffusés par les réseaux réguliers, en d'autres mots, par les réseaux qui diffusent divers types d'émissions en plus des films
- f) Utilisez-vous un service de vidéo-sur-demande (LISEZ AU BESOIN : La vidéo-sur-demande est un service de télévision à la carte qui offre au téléspectateur la possibilité de commander une émission à partir d'un menu et de la regarder sur-le-champ tout en ayant accès aux commandes vidéo : pause, rembobinage, etc.)
- g) Écoutez-vous des films provenant de votre propre collection.
- h) Téléchargez-vous et écoutez-vous des films par le biais d'Internet.

{SAUTEZ A2 SI A1a = 7}

A2 Pour quelles raisons n'allez-vous PAS plus souvent au cinéma? Y a-t-il d'autres raisons?

{NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES APPLICABLES.}

- N'aime pas les films à l'affiche 1
- Trop cher 2
- Pas le temps 3
- L'horaire des films n'est pas pratique 4
- Aucune salle de cinéma dans son quartier 5
- Salles mal adaptées pour personnes ayant un handicap (mobilité réduite, surdit , probl me de vue) 6
- Les films ne sont pas   l'affiche assez longtemps 7
- Sortira sur vid o bient t de toute fa on 8
- Autre (VEUILLEZ PR CISER) 77
- Ne sait pas/Refuse 99

{SAUTEZ A3 SI A1a=1}

A3 Sur une échelle de 1 à 10, où 1 correspond à « Aucune influence » et 10 correspond à « Grande influence », veuillez évaluer l'influence de ces éléments dans votre choix d'un film au cinéma :

Aucune influence 1 {RÉPÉTEZ L'ÉCHELLE AU BESOIN}
Grande influence 10
Ne sait pas/Refuse de répondre.....99 (NE LISEZ PAS)

{ALTERNEZ LA LISTE}

- a) Les publicités à la télévision
- b) Les publicités ailleurs qu'à la télévision, comme par exemple dans les journaux, à la radio, sur Internet ou sur des affiches.
- c) Les critiques élogieuses ou les prix remportés
- d) Le bouche-à-oreille
- e) Les bandes-annonces ou courts extraits au cinéma
- f) Les comédiens qui font partie de la distribution
- g) Le scénario
- h) Le pays d'origine du film
- i) Le réalisateur du film
- j) Les entrevues portant sur le film ou la couverture médiatique

{SAUTEZ A4 et A5 SI A1b=1}

A4 Qu'est-ce qui influence votre choix lorsque vous louez un film? Y a-t-il autre chose?

{NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES APPLICABLES}

La publicité 1
Les critiques élogieuses ou les prix remportés 2
Le bouche-à-oreille 3
Les bandes-annonces ou courts extraits au cinéma 4
Les comédiens qui font partie de la production ... 5
Le scénario 6
Les effets spéciaux 7
Le pays d'origine du film 8
Le réalisateur du film 9
Les publicités à la télévision 10
Les entrevues portant sur le film ou la couverture médiatique 11
La photo sur le dessus et le synopsis à l'endos de la pochette du film semblent intéressants 12
Les enfants veulent voir le film 13
Le film se trouve sur la tablette des nouveautés et est donc facile à trouver en magasin 14
Autre (veuillez préciser) 77
Ne sait pas/Refuse 99

A5. En général, louez-vous un film...

{LISEZ LA LISTE}

Au lieu de voir ce même film au cinéma 1
En plus de voir ce même film au cinéma 2
Ne sait pas/refuse 9 {NE LISEZ PAS}

{SAUTEZ A6 ET A7 SI A1c=1}

A6 Qu'est-ce qui influence votre choix lorsque vous achetez un film? Y a-t-il autre chose?

{NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES APPLICABLES}

La publicité	1
Les critiques élogieuses ou les prix remportés	2
Le bouche-à-oreille.....	3
Les bandes-annonces ou courts extraits au cinéma	4
Les comédiens qui font partie de la distribution ...	5
Le scénario	6
Les effets spéciaux.....	7
Le pays d'origine du film.....	8
Le réalisateur du film	9
Les publicités à la télévision.....	10
Les entrevues portant sur le film ou la couverture médiatique	11
La photo sur le dessus et le synopsis à l'endos de la pochette du film semblent intéressants	12
Les enfants veulent voir le film.....	13
J'aime tellement le film que je veux l'avoir.	14
Je collectionne les films et j'aime en avoir de toutes sortes	15
Autre (veuillez préciser).....	77
Ne sait pas/Refuse	99

A7. En général, achetez-vous un film...

{LISEZ LA LISTE}

Au lieu de voir ce même film au cinéma	1
En plus de voir ce même film au cinéma	2
Ne sait pas/refuse	9 {NE LISEZ PAS}

A8 Sur une échelle de 1 à 10, où 1 correspond à « Pas du tout intéressé(e) » et 10 correspond à « Extrêmement intéressé(e) », veuillez évaluer votre niveau d'intérêt envers les genres de films suivants :

Pas du tout intéressé(e)	1 {RÉPÉTEZ L'ÉCHELLE AU BESOIN}
Extrêmement intéressé(e)	10
Sans objet/Refuse de répondre	99

{ALTERNEZ LA LISTE}

- a) Comédie
- b) Drame
- c) Action
- d) Espionnage ou suspense
- e) Animation
- f) Famille ou enfants
- g) Comédie musicale
- h) Science fiction
- i) Horreur
- j) Film d'auteur ou film d'art
- k) Film étranger

A9 POUR CHACUN DES FILMS SUIVANTS, DEMANDEZ :

- I. TOUS LES RÉPONDANTS
- II. SI OUI À (I) ; SI NON, PASSEZ AU FILM SUIVANT
- III. SI OUI À (II) ; SI NON, PASSEZ AU FILM SUIVANT
- IV.

A9I Avez-vous déjà entendu parler du film suivant?

- | | |
|-----|----------------------------|
| Oui | 1 (posez II) |
| Non | 2 (passez au film suivant) |

{ALTERNEZ LA LISTE}

- a) Séraphin – Un Homme et Son Péché
- b) Elvis Gratton XXX : la Vengeance d'Elvis Wong
- c) Resident Evil: Apocalypse
- d) Les Invasions Barbares
- e) Adorable Julia (AU BESOIN : en anglais Being Julia)
- f) Bollywood Hollywood
- g) Ma vie en cinémascope
- h) La Grande séduction
- i) Mambo Italiano
- j) Entre sœurs (AU BESOIN : en anglais Ginger Snaps)
- k) Le papillon bleu
- l) Quatre hommes et un balai (AU BESOIN : en anglais Men with Brooms)
- m) La Corporation (AU BESOIN : en anglais The Corporation)
- n) Les Boys III
- o) Ryan
- p) 20 h 17 rue Darling
- q) La grande débandade (AU BESOIN : en anglais Going the distance)

A9II L'avez-vous vu?

- | | |
|-----------------------------|---|
| Oui | 1 (posez III) |
| Non | 2 (passez au film suivant) |
| Ne s'en souvient pas/refuse | 9 (NE LISEZ PAS) (passez au film suivant) |

A9III Où l'avez-vous vu la première fois?

{NE LISEZ PAS LA LISTE. ACCEPTEZ QU'UNE SEULE REPONSE }

- | | |
|--------------------------------|-------------------|
| Cinéma | 1 |
| Vidéo ou DVD..... | 2 |
| Télévision | 3 |
| Téléchargement | 4 |
| Avion | 5 |
| Festival de films..... | 6 |
| Autre (veuillez préciser)..... | 77 |
| Ne sait pas/refuse | 99 (NE LISEZ PAS) |

{SAUTEZ A10a-c SI A1a = 1}

A10a Avez-vous vu d'autres longs métrages canadiens au cours de l'année dernière? AU BESOIN : Les longs métrages canadiens sont des films produits par des Canadiens, y compris les films québécois.

- | | |
|---------------------------|---------------------------------|
| Oui | 1 (POSEZ A10b) |
| Non | 2 (PASSEZ À A11) |
| Ne s'en souvient pas..... | 9 (NE LISEZ PAS) (PASSEZ À A11) |

A10b De quel(s) film(s) s'agit-il? (Code 1 – 98)

Réponse 1: _____

Réponse 2: _____

Réponse 3: _____

Ne sait pas/refuse99 (PASSEZ À A11)

A10c Où avez-vous vu ce film la première fois? (Posez pour toutes les réponses à A10b)

{NE LISEZ PAS LA LISTE. ACCEPTEZ QU'UNE SEULE REPONSE}

Cinéma 1

Vidéo ou DVD 2

Télévision 3

Téléchargement 4

Avion 5

Festival de films 6

Autre (veuillez préciser) 77

Ne sait pas/refuse 99 (NE LISEZ PAS)

A11 Sur une échelle de 1 à 10, où 1 correspond à « Fortement en désaccord » et 10 correspond à « Fortement en accord », veuillez dire dans quelle mesure vous êtes en accord ou en désaccord avec chacun des énoncés suivants :

Fortement en désaccord 1 {RÉPÉTEZ L'ÉCHELLE AU BESOIN}

Fortement en accord 10

Sans opinion/refuse de répondre 99 (NE LISEZ PAS)

{ALTERNEZ LA LISTE}

- a) Si les films canadiens bénéficiaient d'une meilleure promotion et d'une meilleure publicité, ils attireraient davantage de gens.
- b) En termes de jeu, de réalisation et de production, les films canadiens sont d'aussi bonne qualité que les films en provenance d'autres pays.
- c) Je pense qu'il est important que les films canadiens soient à l'affiche dans les cinémas au Canada.
- d) Je pense qu'il est important que les films canadiens soient diffusés à la télévision canadienne.
- e) Je pense qu'il est important qu'on exporte et fasse la promotion des films canadiens dans d'autres pays.
- f) Les films américains sont mieux réalisés que ceux d'ailleurs.
- g) Au cours des dernières années, je pense que l'industrie cinématographique canadienne a commencé à produire de meilleurs films.
- h) La plupart des films canadiens ne sont pas à l'affiche dans les cinémas.
- i) La plupart des films canadiens ne sont pas disponibles dans les clubs vidéo.
- j) Je m'identifie aux histoires que racontent les films canadiens.

SAUTEZ A12a ET A12bi OU A12bii si A1a-h = 1}

A12a Au cours d'une année normale, quel pourcentage de films voyez-vous en version française originale, quel pourcentage voyez-vous en version anglaise originale et quel pourcentage voyez-vous autrement, c'est-à-dire en version doublée, avec sous-titrage ou en langue étrangère?

{LISEZ TOUT D'ABORD LES OPTIONS PUIS DEMANDEZ AU RÉPONDANT DE VOUS DONNER UN POURCENTAGE POUR CHACUNE DE FAÇON À CE QUE LE TOTAL SOIT DE 100 %}

Version française originale %
Version anglaise originale %
Autrement (y compris en version doublée, avec sous-titrage ou en langue étrangère – NE PAS PRÉCISER) %
Ne sait pas/refuse de répondre 999 {NE LISEZ PAS}

NOTE AU PROGRAMMEUR : LE TOTAL DOIT ÊTRE DE 100 % À MOINS QUE LE LA RÉPONSE SOIT NE SAIT PAS/REFUSE.

A12bi. [RÉPONDANTS ANGLOPHONES] Lorsque vous voulez voir un film qui a été tourné en FRANÇAIS, préférez-vous généralement le voir...

En version française originale 1
Avec des sous-titres anglais 2
Doublé en anglais 3
Aucune préférence 4 {NE LISEZ PAS}
Ne sait pas/refuse 9 {NE LISEZ PAS}

A12bii. [RÉPONDANTS FRANCOPHONES] Lorsque vous voulez voir un film qui a été tourné en ANGLAIS, préférez-vous généralement le voir...

En version anglaise originale 1
Avec des sous-titres français 2
Doublé en français 3
Aucune préférence 4 {NE LISEZ PAS}
Ne sait pas/refuse 9 {NE LISEZ PAS}

SECTION B : ÉCOUTE MUSICALE

{LISEZ} Les prochaines questions porteront sur la musique.

HABITUDES D'ÉCOUTE

B1 En moyenne, combien d'heures par semaine écoutez-vous de la musique... (RÉPÉTEZ CETTE INTRODUCTION POUR CHACUN DES APPAREILS MENTIONNÉS)

{LISEZ LA LISTE}

Zéro	1
Moins d'une heure	2
De 1 à 5 heures	3
De 6 à 10 heures	4
De 11 à 25 heures	5
Plus de 25 heures.....	6
Ne sait pas/refuse de répondre	9 {NE LISEZ PAS}

{ALTERNEZ LA LISTE}

- a) sur CD (disque compact), MP3 ou cassettes
- b) à la radio
- c) sur Internet
- d) à la télévision

{SI B1a-d =1, PASSEZ À B3}

B2 Quel pourcentage de cette écoute est consacré à la musique d'artistes canadiens?

{LISEZ LA LISTE}

Zéro	1
Moins de 10 %.....	2
De 10 % à 25 %	3
De 26 % à 50 %	4
De 51 % à 75 %	5
De 76 % à 100 %	6
Ne sait pas/refuse de répondre	9 {NE LISEZ PAS}

B3 Possédez-vous ou avez-vous accès aux appareils suivants, que ce soit à la maison, au travail ou ailleurs?

Oui	1
Non	2
NSP/Refuse	9 {NE LISEZ PAS}

- a) Ordinateur
- b) Graveur de CD
- c) Lecteur numérique portable ou MP3 portable
- d) Lecteur DVD
- e) Graveur de DVD
- f) Téléphone cellulaire

{SI B1a-d =1, PASSEZ À B6}

B4 Sur une échelle de 1 à 10, où 1 correspond à « Pas du tout intéressé(e) » et 10 correspond à « Extrêmement intéressé(e) », veuillez évaluer votre niveau d'intérêt envers les genres de musique suivants :

Pas du tout intéressé(e)1 {RÉPÉTEZ L'ÉCHELLE AU BESOIN}
Extrêmement intéressé(e)10
Sans objet/Refuse de répondre99 {NE LISEZ PAS}

{ALTERNEZ LA LISTE}

- a) Le country
- b) Le rock, incluant le rock léger, le rock accentué et le rock classique
- c) Les succès actuels ou la musique populaire
- d) La musique électronique
- e) Le classique ou l'opéra
- f) Le Hip-Hop
- g) Le R&B
- h) La musique de danse
- i) Le jazz ou le blues
- j) La musique du monde
- k) La musique folklorique

B5 Quel pourcentage de la musique que vous écoutez est de la chanson française, quel pourcentage est de la chanson anglaise, quel pourcentage est de la musique instrumentale et quel pourcentage est de la chanson en langue étrangère?

{LISEZ TOUT D'ABORD LES OPTIONS PUIS DEMANDEZ AU RÉPONDANT DE VOUS DONNER UN POURCENTAGE POUR CHACUNE DE FAÇON À CE QUE LE TOTAL SOIT DE 100 %}

Chanson française %
Chanson anglaise %
Musique instrumentale %
Chanson en langue étrangère (précisez) %
Ne sait pas/refuse de répondre999 {NE LISEZ PAS}

B6 Sur une échelle de 1 à 10, où 1 correspond à « pas aussi bonne », 5 correspond à « de même qualité » et 10 correspond à « bien meilleure » comment évalueriez-vous la qualité de la musique produite par les artistes canadiens comparativement à celle produite par des artistes étrangers?

Pas aussi bonne1
De même qualité5
Bien meilleure10
Sans opinion/refuse de répondre99 (NE LISEZ PAS)

ACHAT

{SI B1a-d =1, PASSEZ À B10}

B7 Combien de CD de musique avez-vous achetés au cours de la dernière année, que ce soit pour vous ou pour quelqu'un d'autre?

{LISEZ LA LISTE AU BESOIN, SONDEZ POUR OBTENIR UN CHIFFRE APPROXIMATIF}

- Aucun1 {PASSEZ À B9}
- De 1 à 5.....2
- De 6 à 10.....3
- De 11 à 20.....4
- De 21 à 30.....5
- Plus de 306
- Ne sait pas/refuse de répondre.....9 (NE LISEZ PAS) (PASSEZ À B9)

B8 Combien de ces CD de musique sont d'artistes canadiens?

{LISEZ LA LISTE AU BESOIN, SONDEZ POUR OBTENIR UN CHIFFRE APPROXIMATIF}

- Aucun1
- De 1 à 5.....2
- De 6 à 10.....3
- De 11 à 20.....4
- De 21 à 30.....5
- Plus de 306
- Ne sait pas/refuse de répondre.....9 (NE LISEZ PAS)

B9a Où achetez-vous habituellement vos CD de musique?

{NE LISEZ PAS LA LISTE. SÉLECTIONNEZ L'ENDROIT OÙ IL/ELLE ACHÈTE LE PLUS SOUVENT}

- Magasins de musique (HMV, Virgin, Archambault, Music World) 1
- Grandes surfaces (Wal-Mart, Best Buy, Future Shop, CostCo) 2
- En ligne.....3
- Concerts ou spectacles.....4
- N'achète pas de CD de musique5
- Autre (veuillez préciser).....77
- Ne sait pas/refuse de répondre.....99

B9b À quel autre endroit achetez-vous également des CD de musique? {NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES APPLICABLES}

- Magasins de musique (HMV, Virgin, Archambault, Music World) 1
- Grandes surfaces (Wal-Mart, Best Buy, Future Shop, CostCo) 2
- En ligne.....3
- Concerts ou spectacles.....4
- N'achète pas de CD de musique5
- Autre (veuillez préciser).....77
- Ne sait pas/refuse de répondre.....99

B10 Combien de DVD de musique avez-vous achetés au cours de la dernière année, que ce soit pour vous ou pour quelqu'un d'autre?

{NOTE AUX INTERVIEWEURS : ASSUREZ-VOUS QUE LE RÉPONDANT REpond EN FONCTION DES **DVD DE MUSIQUE** ET **NON** DE FILMS, DE TÉLÉSÉRIES, ETC.}

{LISEZ LA LISTE}

Aucun	1	
De 1 à 2		2
De 3 à 5		3
De 6 à 10	4	
De 11 à 15	5	
Plus de 15	6	
Ne sait pas/refuse de répondre	9	{NE LISEZ PAS}

B11 Où avez-vous accès à Internet?

{NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES APPLICABLES}

Maison	1
Travail	2
École	3
Autre (veuillez préciser)	77
N'a pas accès à Internet	98
Ne sait pas/refuse de répondre	99

{SI LE RÉPONDANT DIT QU'IL N'A PAS ACCÈS À INTERNET À B11, ALORS PASSEZ À B16}

{SI B1a-d =1, PASSEZ À B16}

B12 Combien de chansons avez-vous achetées par Internet au cours de la dernière année?

{LISEZ LA LISTE}

Aucune	1	{PASSEZ À B14}
De 1 à 9	2	
De 10 à 50	3	
De 51 à 100	4	
Plus de 100	5	
Ne sait pas/refuse de répondre	9	{NE LISEZ PAS} {PASSEZ À B14}

B13 Combien de ces chansons provenaient par des artistes canadiens?

{LISEZ LA LISTE}

Aucune	1	
De 1 à 9	2	
De 10 à 50	3	
De 51 à 100	4	
Plus de 100	5	
Ne sait pas/refuse de répondre	9	{NE LISEZ PAS}

B14 Combien de chansons avez-vous téléchargées gratuitement avec Internet au cours de la dernière année?

{LISEZ LA LISTE}

Aucune	1	{PASSEZ À B16}
De 1 à 9.....	2	
De 10 à 50.....	3	
De 51 à 100.....	4	
Plus de 100	5	
Ne sait pas/refuse de répondre.....	9	{NE LISEZ PAS}{PASSEZ À B16}

B15 Combien de ces chansons provenaient par des artistes canadiens?

{LISEZ LA LISTE}

Aucune	1	
De 1 à 9.....	2	
De 10 à 50.....	3	
De 51 à 100.....	4	
Plus de 100	5	
Ne sait pas/refuse de répondre.....	9	{NE LISEZ PAS}

{POSEZ B16 SI B3f = 1}

B16 Au cours de la dernière année, combien de sonneries musicales avez-vous achetées pour votre téléphone cellulaire?

{LISEZ LA LISTE AU BESOIN. SONDEZ POUR OBTENIR UN CHIFFRE APPROXIMATIF}

Aucun	1	
De 1 à 5.....		2
De 6 à 10.....	3	
11 ou plus.....	4	
Ne sait pas/refuse de répondre.....	9	{NE LISEZ PAS}

B17 De quelle manière découvrez-vous habituellement de nouvelles musiques?

{NE LISEZ PAS LA LISTE. ACCEPTEZ TOUTES LES RÉPONSES APPLICABLES.}

Radio	1
Télévision	2
En assistant à des spectacles.....	3
Publicité.....	4
Bouche-à-oreille	5
Internet	6
Prix remportés ou critiques élogieuses	7
Presse écrite, comme des journaux ou des magazines	8
Autre (veuillez préciser).....	77
Ne sait pas/refuse de répondre.....	99

B18 Sur une échelle de 1 à 10, où 1 correspond à « Fortement en désaccord » et 10 correspond à « Fortement en accord », veuillez me dire dans quelle mesure vous êtes en accord ou en désaccord avec chacun des énoncés suivants :

Fortement en désaccord1 {RÉPÉTEZ L'ÉCHELLE AU BESOIN}
Fortement en accord10
Sans opinion/refuse de répondre99 {NE LISEZ PAS}

{ALTERNEZ PAR PAIRES : A et B ensemble ou C et D ensemble}

- a) Lorsque je veux acheter de la musique d'artistes canadiens, je la trouve facilement en magasin.
- b) {POSEZ SEULEMENT AUX RÉPONDANTS QUI ONT DIT AVOIR ACCÈS À INTERNET À B11}
Lorsque je veux acheter de la musique d'artistes canadiens, je peux facilement l'acheter en ligne.
- c) Lorsque je veux acheter de la musique d'artistes étrangers, je la trouve facilement en magasin.
- d) {POSEZ SEULEMENT AUX RÉPONDANTS QUI ONT DIT AVOIR ACCÈS À INTERNET À B11}
Lorsque je veux acheter de la musique d'artistes étrangers, je peux facilement l'acheter en ligne.

SPECTACLES

B19 À combien de spectacles de musique avez-vous assisté au cours de la dernière année? Veuillez inclure les spectacles de musiciens, d'interprètes et de groupes amateurs et professionnels.

{LISEZ LA LISTE}

Aucun1 {PASSEZ À LA SECTION SUIVANTE}
De 1 à 52
De 6 à 103
De 11 à 154
16 ou plus5
Ne sait pas/refuse de répondre9 {NE LISEZ PAS}

B20 Combien de ces spectacles mettaient en vedette des artistes canadiens?

{LISEZ LA LISTE}

Aucun1
De 1 à 52
De 6 à 103
De 11 à 154
16 ou plus5
Ne sait pas/refuse de répondre9 {NE LISEZ PAS}

B21 Avez-vous acheté l'un des articles suivants lors de ces spectacles?

Oui	1
Non	2
NSP/Refuse	9 {NE LISEZ PAS}

- a) CD ou DVD de musique
- b) D'autres produits d'érivés du concert

{POSEZ B21 POUR CHAQUE « OUI » À B20}

B22 En moyenne, combien avez-vous dépensé lors de chaque spectacle pour...

Moins de 20 \$	1
De 20 \$ à 40 \$	2
Plus de 40 \$	3
NSP/Refuse	9 {NE LISEZ PAS}

- a) CD ou DVD de musique
- b) D'autres articles relatifs au concert

SECTION C : QUESTIONS DÉMOGRAPHIQUES

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

C1 Veuillez m'arrêter lorsque je nommerai la catégorie d'âges à laquelle vous appartenez. **{LISEZ ET FAITES UNE PAUSE APRÈS CHAQUE MENTION}**

- De 15 à 20 ans1
- De 21 à 24 ans2
- De 25 à 34 ans3
- De 35 à 44 ans4
- De 45 à 54 ans5
- De 55 à 64 ans6
- Plus de 64 ans.....7
- REFUSE.....9 **{NE LISEZ PAS}**

C2 Veuillez m'arrêter lorsque je nommerai le plus haut niveau de scolarité que vous avez complété. **{LISEZ ET FAITES UNE PAUSE APRÈS CHAQUE MENTION}**

- Études secondaires non terminées1
- Études secondaires terminées2
- Études collégiales, techniques, CÉGEP non terminé(es).....3
- Études collégiales, techniques, CÉGEP terminé(es).....4
- Études universitaires non terminées5
- Études universitaires terminées6
- Diplôme d'études supérieures (Maîtrise, doctorat)7
- REFUSE.....9 **{NE LISEZ PAS}**

C3 En vous incluant, combien de personnes vivant au sein de votre foyer sont âgées de..?

Réponses	Zéro	1-8	Incertain(e)/refuse
a) 20 ans ou plus	0	1-8	99
b) De 15 à 19 ans	0	1-8	99
c) De 12 à 14 ans	0	1-8	99
d) 11 ans ou moins	0	1-8	99

C4. Considérez-vous que vous faites partie d'une minorité visible en raison de votre race ou de la couleur de votre peau?

- Oui 1
- Non 2
- Ne sait pas/refuse 9

C5 Êtes-vous Autochtone? (Un Autochtone est un Amérindien ou un membre d'une Première nation, Inuit ou Métis. Les membres des Premières nations comprennent les Indiens de plein droit, visés par un traité ou inscrits. Les Indiens d'Amérique du Nord comprennent les Indiens non inscrits ou de fait.)

- Oui 1
- Non 2
- Ne sait pas/refuse 9

C6 Veuillez m'arrêter à la catégorie qui représente le mieux le revenu de l'ensemble des membres de votre foyer? Est-ce...{LISEZ ET FAITES UNE PAUSE APRÈS CHAQUE MENTION}

- Moins de 20 000 \$.....1
- Entre 20 000 \$ et 40 000 \$.....2
- Entre 40 000 \$ et 60 000 \$.....3
- Entre 60 000 \$ et 80 000 \$.....4
- Entre 80 000 \$ et 100 000 \$.....5
- Entre 100 000 \$ et 120 000 \$.....6
- 120 000 \$ et plus.....7
- REFUSE.....9 {NE LISEZ PAS}

L'entrevue est maintenant terminée. Je vous remercie d'avoir pris de temps de répondre à mes questions.

C7 ENTREZ LE SEXE DU RÉPONDANT {NE LE DEMANDEZ PAS}

- HOMME 1
- FEMME 2