

**APPENDIX 5B
CONSUMER SURVEY**



The Canadian Movie Channel Consumer Study Results

May 2012

Methodology

- Vision Critical conducted an online survey with a market representative sample of 1,007 English-speaking Canadians recruited from its proprietary panel, Angus Reid Forum.
- The survey was fielded from May 7 to 11, 2012.
- Bruce Anderson designed the study and analyzed results, with support from Vision Critical.
- Readers' note:
 - The survey sample is referred to as “Canadians” throughout this report, although it represents English-speaking Canadians aged 18+ in households with digital TV service.



- Support for Proposed Service

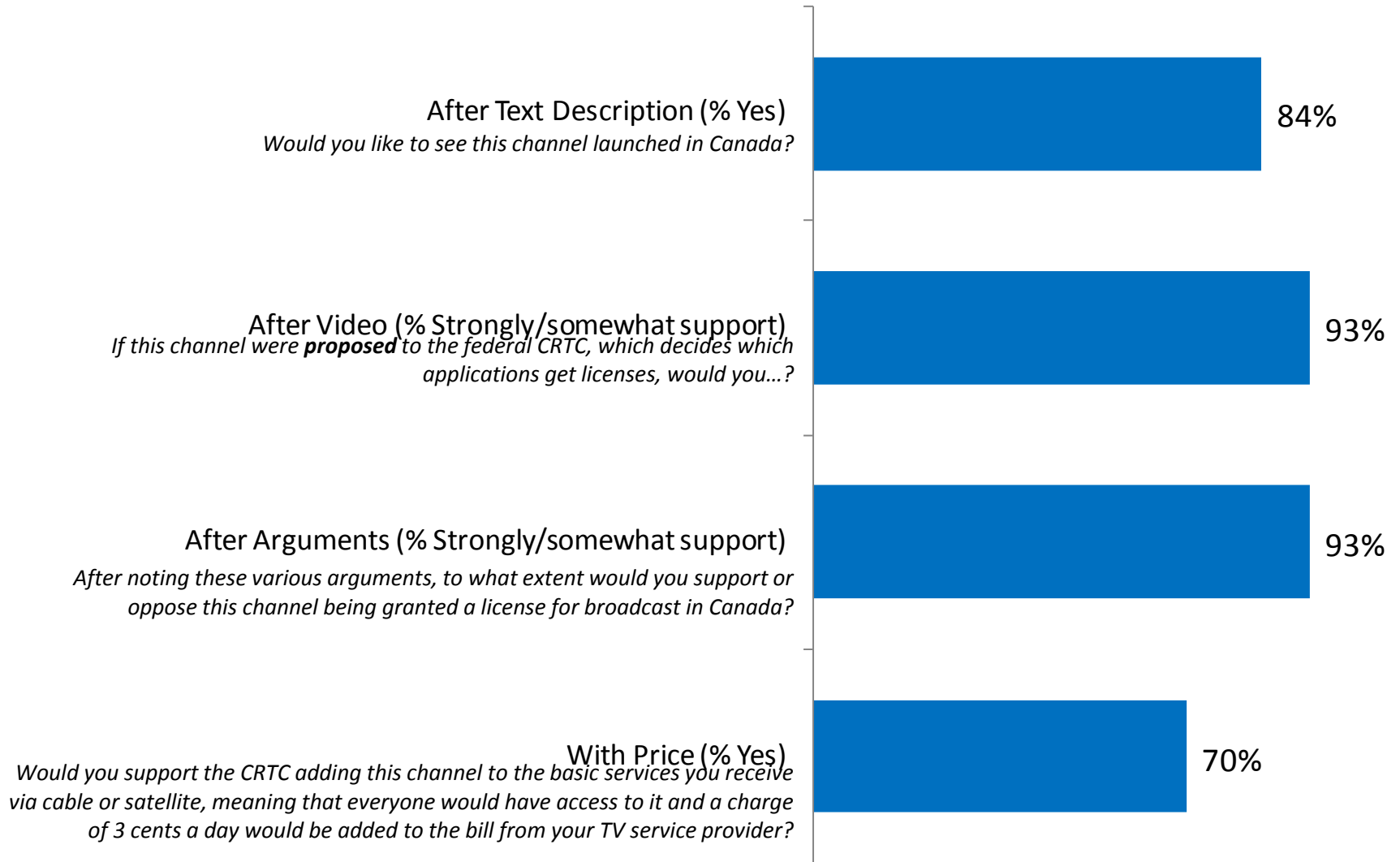
Executive Summary 1 of 2

- Support for The Canadian Movie Channel is broad and deep:
 - Following a text description of the concept, more than 8-in-10 Canadians (83%) say they would like to see the channel launched.
 - After viewing a video reel demonstrating the concept, more than 9-in-10 (93%) supported the licensing of the channel.
 - Support remains high even after cost is introduced—more than two-thirds (70%) support the channel being added to basic service for 3 cents/day.
- Overall support is consistent across a wide range of demographic and other subgroups, including type of TV service:
 - Support at 3 cents a day is slightly higher among Canadians aged 55+
 - However, across all subgroups, a solid majority support the channel, even at a charge of 3 cents a day.

Executive Summary 2 of 2

- Three general themes fuel what are seen as strong arguments in support of The Canadian Movie Channel:
 - Full-length movies without commercial interruption—particularly among avid movie fans
 - The notion that the channel would deliver economic benefits for Canada
 - Opportunities provided for young people in the film industry—a sentiment shared across all age groups.

Support for Proposed Channel



Support for Proposed Channel – Demographics

[After Text Description] *Would you like to see this channel launched in Canada?*

[After Video] *If this channel were proposed to the federal CRTC, which decides which applications get licenses, would you...?*

[After Arguments] *After noting these various arguments, to what extent would you support or oppose this channel being granted a license for broadcast in Canada?*

[With Price] *Would you support the CRTC adding this channel to the basic services you receive via cable or satellite, meaning that everyone would have access to it and a charge of 3 cents a day would be added to the bill from your TV service provider?*

	Total	Gender		Age Group			Household Income		
		Male	Female	18-34	35-54	55+	Less than \$50K	\$50-99K	\$100K+
After Text Description (% Yes)	84%	78%	90%	83%	84%	85%	90%	82%	81%
After Video (% Strongly/somewhat support)	93%	90%	96%	94%	92%	93%	95%	92%	95%
After Arguments (% Strongly/somewhat support)	93%	91%	94%	92%	92%	93%	95%	91%	93%
With Price (% Yes)	70%	68%	72%	68%	67%	75%	78%	70%	69%

Support for Proposed Channel – Media Consumption

[After Text Description] *Would you like to see this channel launched in Canada?*

[After Video] *If this channel were proposed to the federal CRTC, which decides which applications get licenses, would you...?*

[After Arguments] *After noting these various arguments, to what extent would you support or oppose this channel being granted a license for broadcast in Canada?*

[With Price] *Would you support the CRTC adding this channel to the basic services you receive via cable or satellite, meaning that everyone would have access to it and a charge of 3 cents a day would be added to the bill from your TV service provider?*

	Total	TV Service Provider Type			TV Service Monthly Bill				Movie Engagement	
		Cable	Satellite	Other	\$39 or less	\$40-59	\$60-79	\$80+	Avid movie fan	Not an avid movie fan
After Text Description (% Yes)	84%	85%	83%	83%	80%	87%	81%	86%	90%	83%
After Video (% Strongly/somewhat support)	93%	93%	93%	97%	88%	96%	92%	93%	96%	93%
After Arguments (% Strongly/somewhat support)	93%	92%	94%	96%	88%	95%	91%	93%	97%	92%
With Price (% Yes)	70%	69%	71%	73%	65%	70%	71%	71%	70%	70%

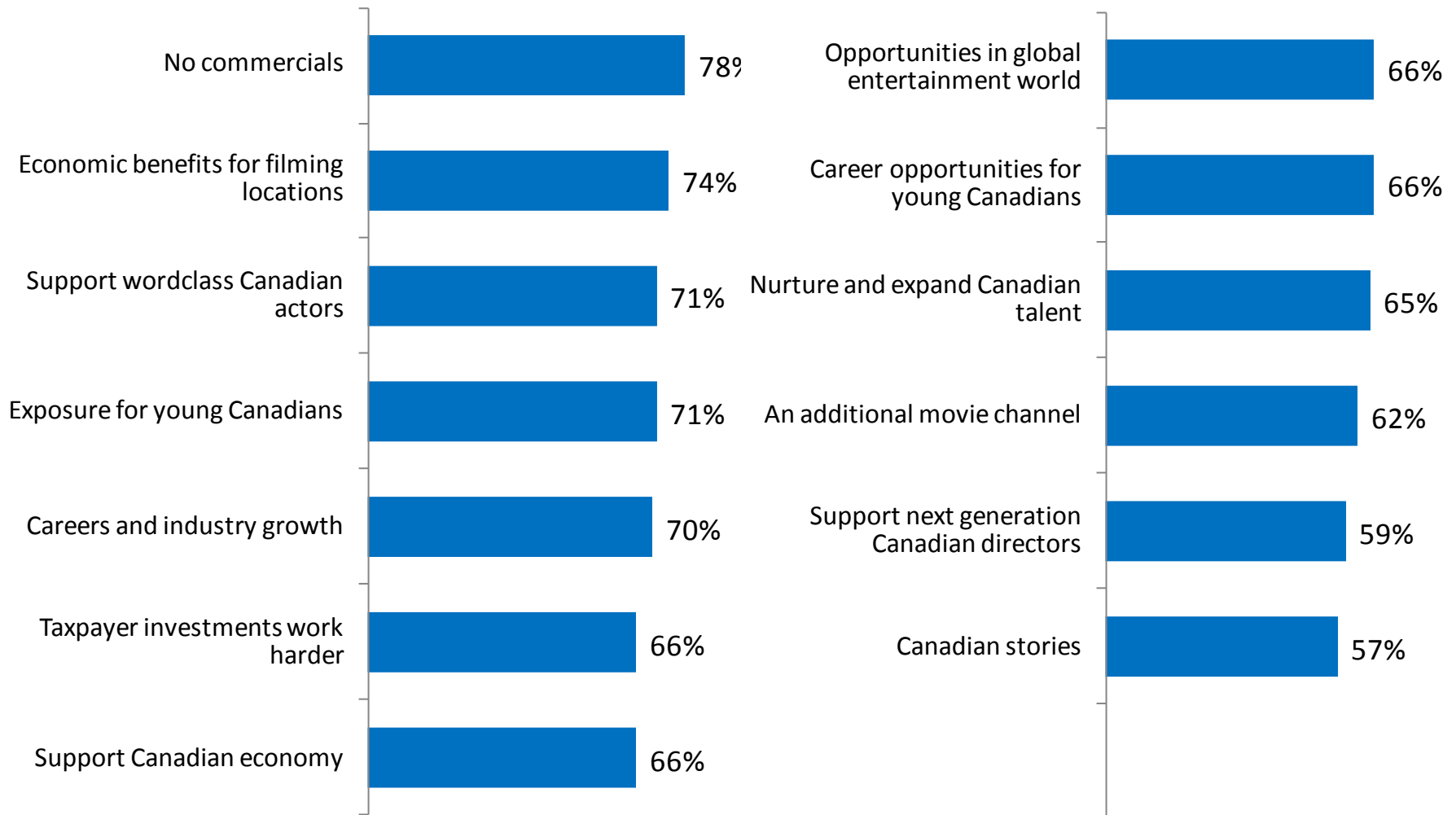
Persuasiveness of Arguments for the Proposed Channel

In thinking about the reasons why someone might support a channel like this, how important are each of these to you personally. Please tell us how persuasive you find each of these arguments.

	Top2Box (% Very Strong Argument + Strong Argument)	Total
No commercials <i>I love the idea of a channel that offers movies without commercial interruptions.</i>		78%
Economic benefits for filming locations <i>When Canadian feature films are made this helps employ lots of talented people and creates economic benefits for the communities where the films are shot.</i>		74%
Support word class Canadian actors <i>Canadian actors can compete with the best anywhere in the world and a channel like this can help more of them succeed.</i>		71%
Exposure for young Canadians <i>Helping young Canadians get their creative projects in front of a larger audience is a great part of this proposal.</i>		71%
Careers and industry growth <i>This channel will mean more Canadians can make careers and strengthen and grow our filmed entertainment industry.</i>		70%
Taxpayer investments work harder <i>Canadians subsidize the production of Canadian feature films with our tax credits but these days they are often not shown to people, so a channel like this would allow our investment as taxpayers to work harder.</i>		66%
Support Canadian economy <i>Organizations like the Toronto International Film Festival are enthusiastic supporters of this channel and believe it will be good for the Canadian economy.</i>		66%
Opportunities in global entertainment world <i>Regardless of whether I or other people might watch this channel, we should get behind it because of the opportunities it means for Canada to compete in the global entertainment market.</i>		66%
Career opportunities for young Canadians <i>Regardless of whether I or other people might watch this channel, we should get behind it because of the opportunities it means for young Canadians to find job and career opportunities.</i>		66%
Nurture and expand Canadian talent <i>The arts and film are important areas of growth in the economy of the world and Canada can't afford to be left behind, we need a channel like this to help nurture and expand our talent.</i>		65%
An additional movie channel <i>I like movies and would be happy to see another channel offering movies I can choose to watch.</i>		62%
Support next generation Canadian directors <i>The proponents of this channel are doing this in part because of their commitment to create a next generation of great Canadian directors.</i>		59%
Canadian stories <i>Canadian stories are interesting to me and so a channel with movies that tell us stories about Canada would be welcome.</i>		57%

Persuasiveness of Arguments for the Proposed Channel

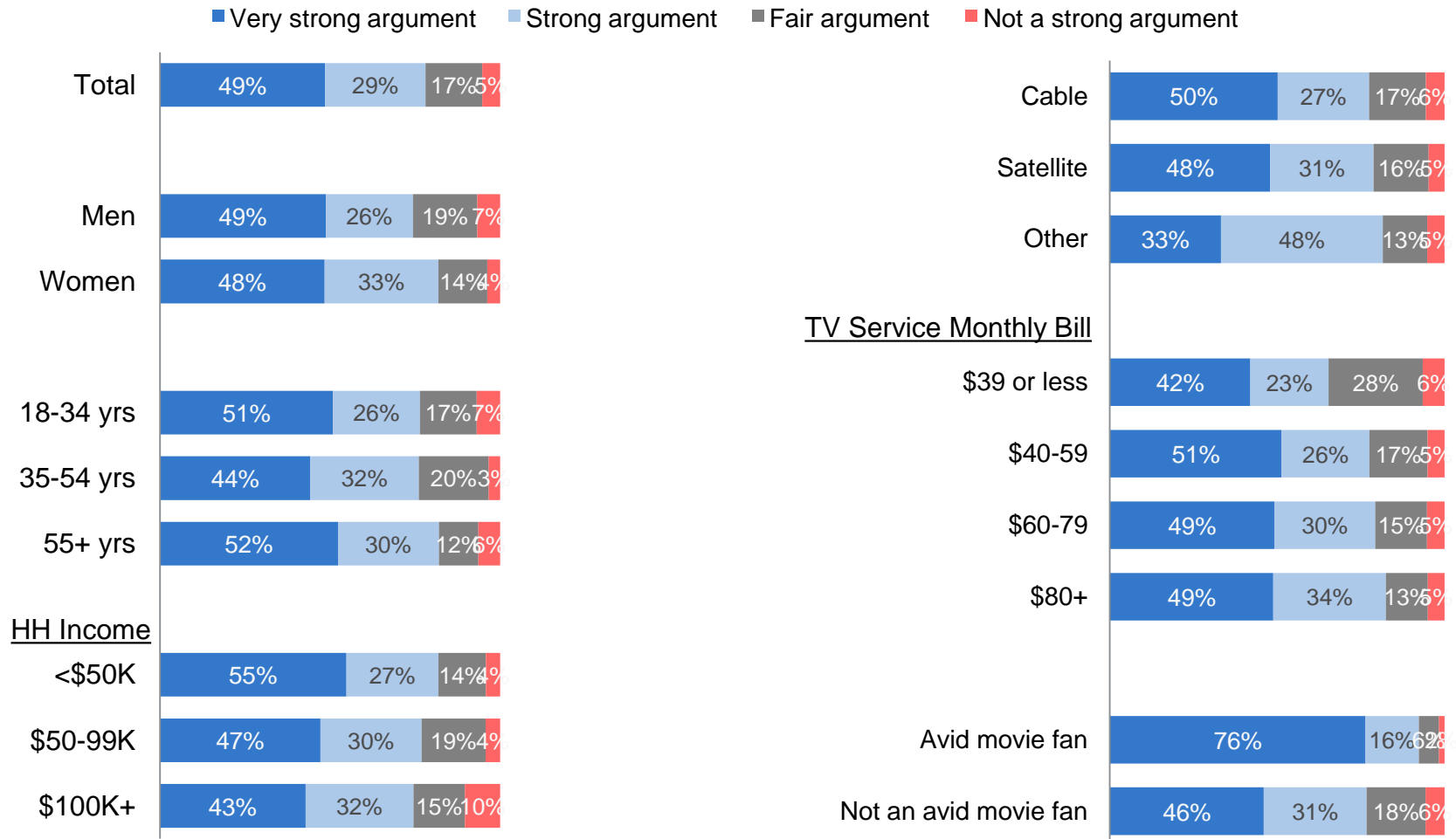
In thinking about the reasons why someone might support a channel like this, how important are each of these to you personally. Please tell us how persuasive you find each of these arguments [Top2box: % Very Strong Argument + Strong Argument]



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

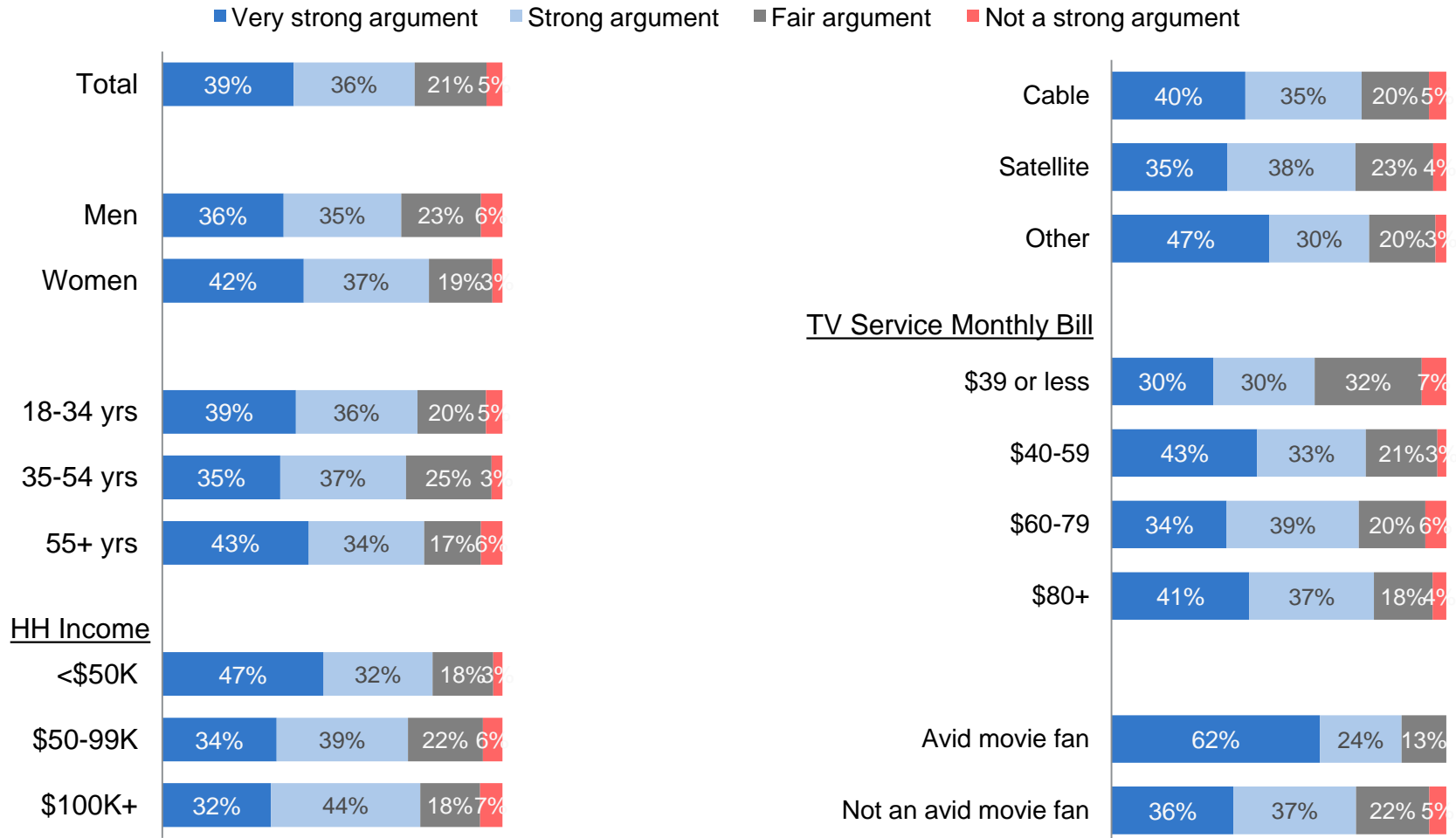
I love the idea of a channel that offers movies without commercial interruptions



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

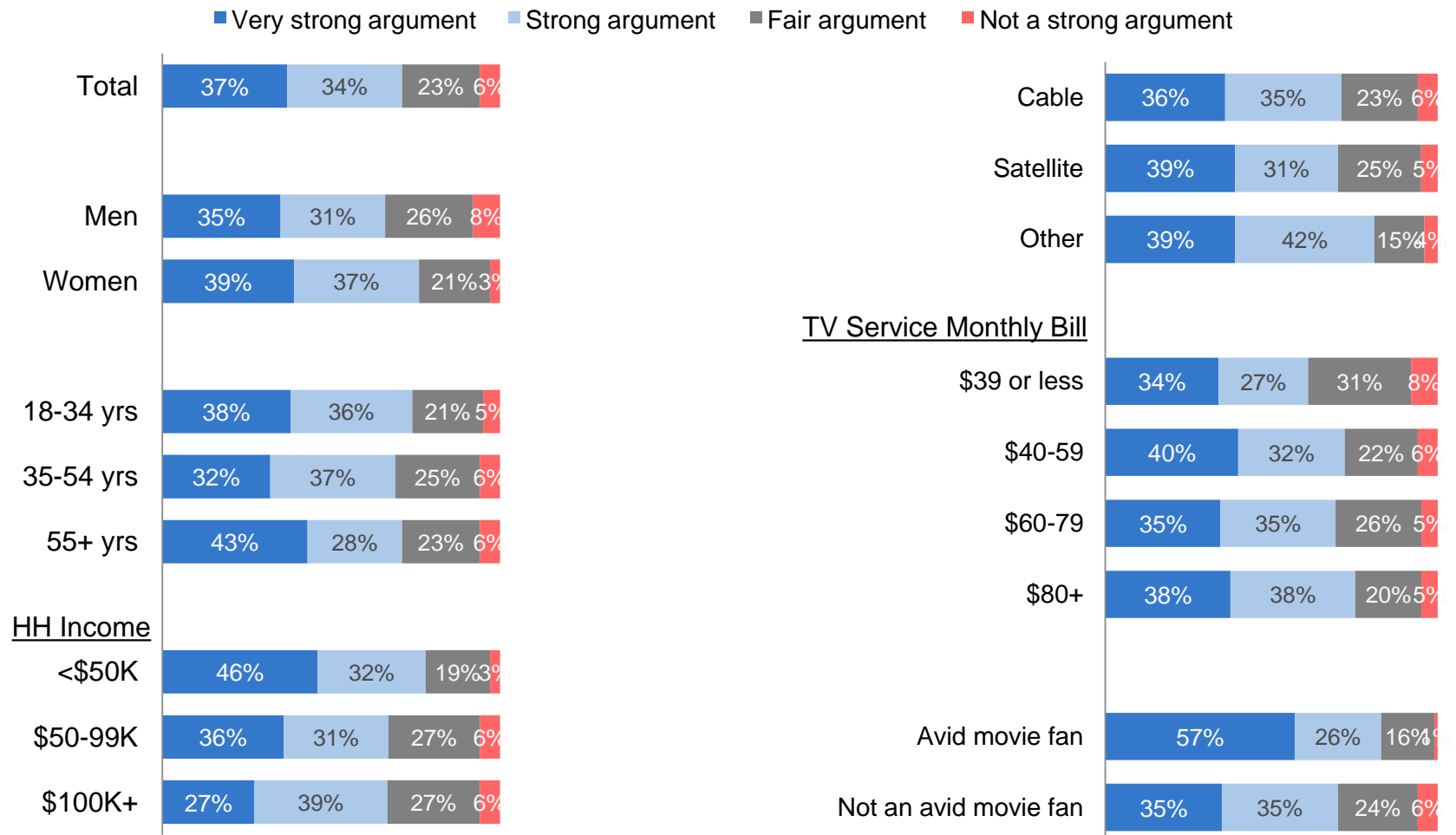
When Canadian feature films are made this helps employ lots of talented people and creates economic benefits for the communities where the films are shot



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

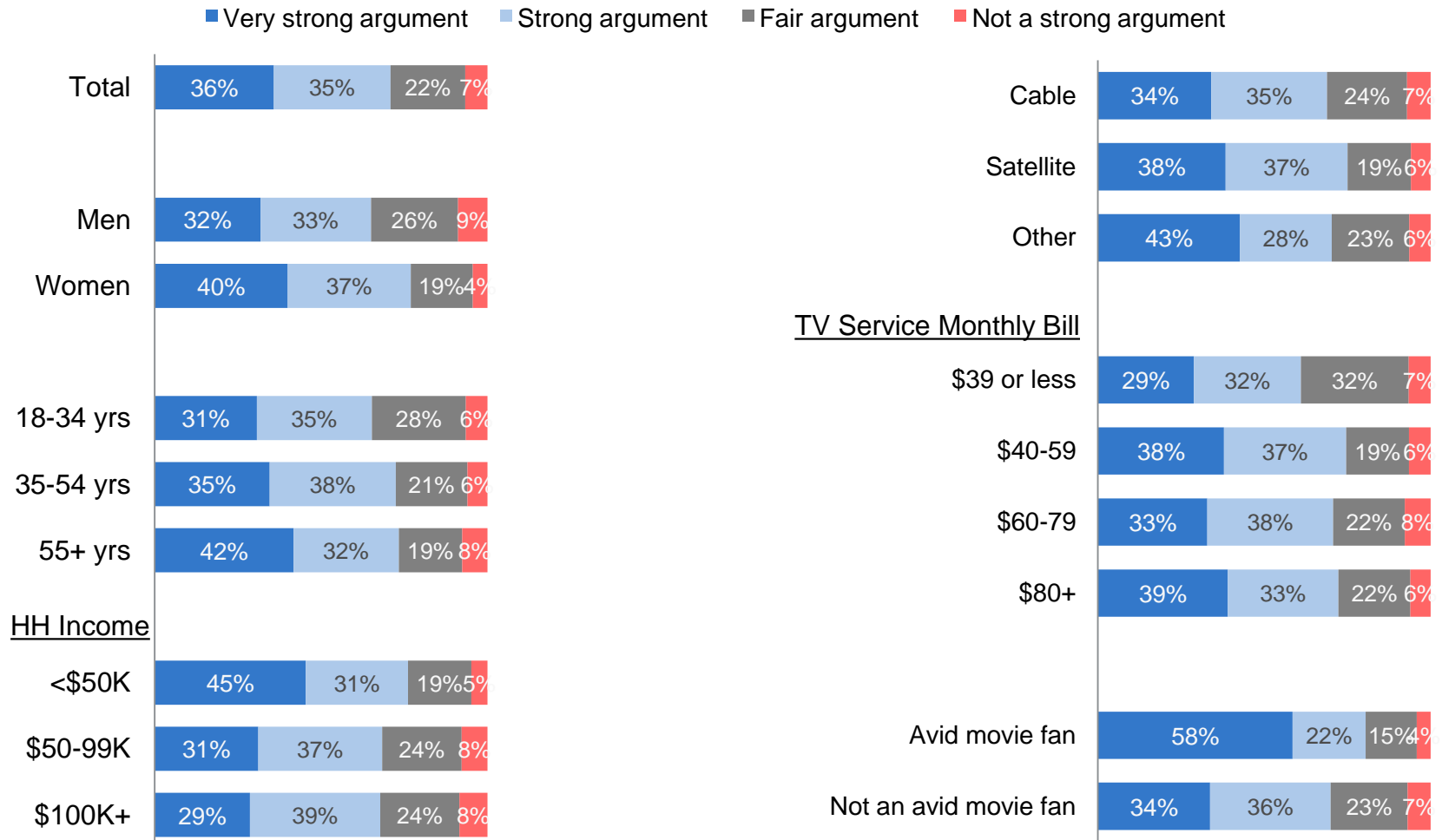
Helping young Canadians get their creative projects in front of a larger audience is a great part of this proposal



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

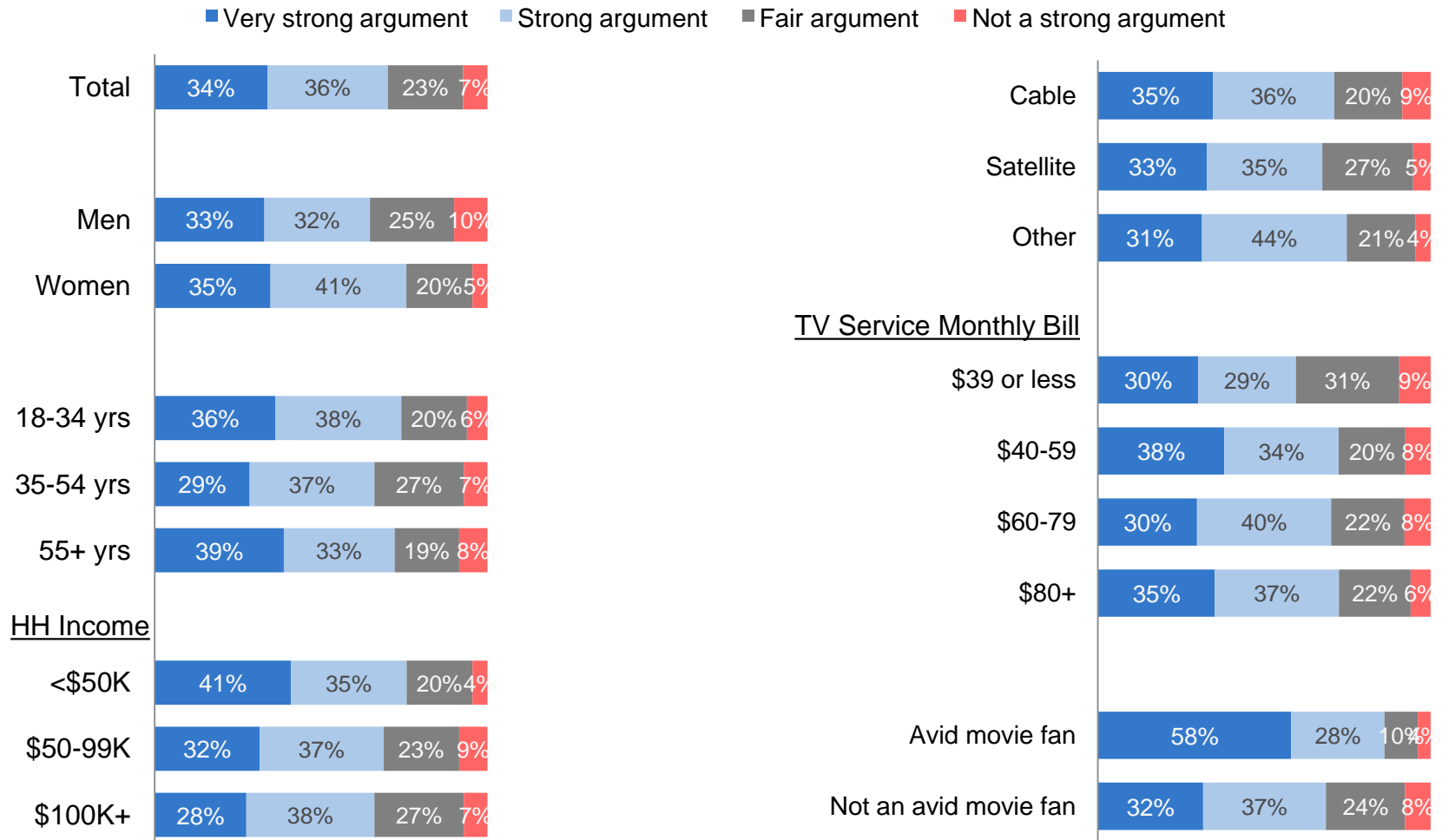
Canadian actors can compete with the best anywhere in the world and a channel like this can help more of them succeed



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

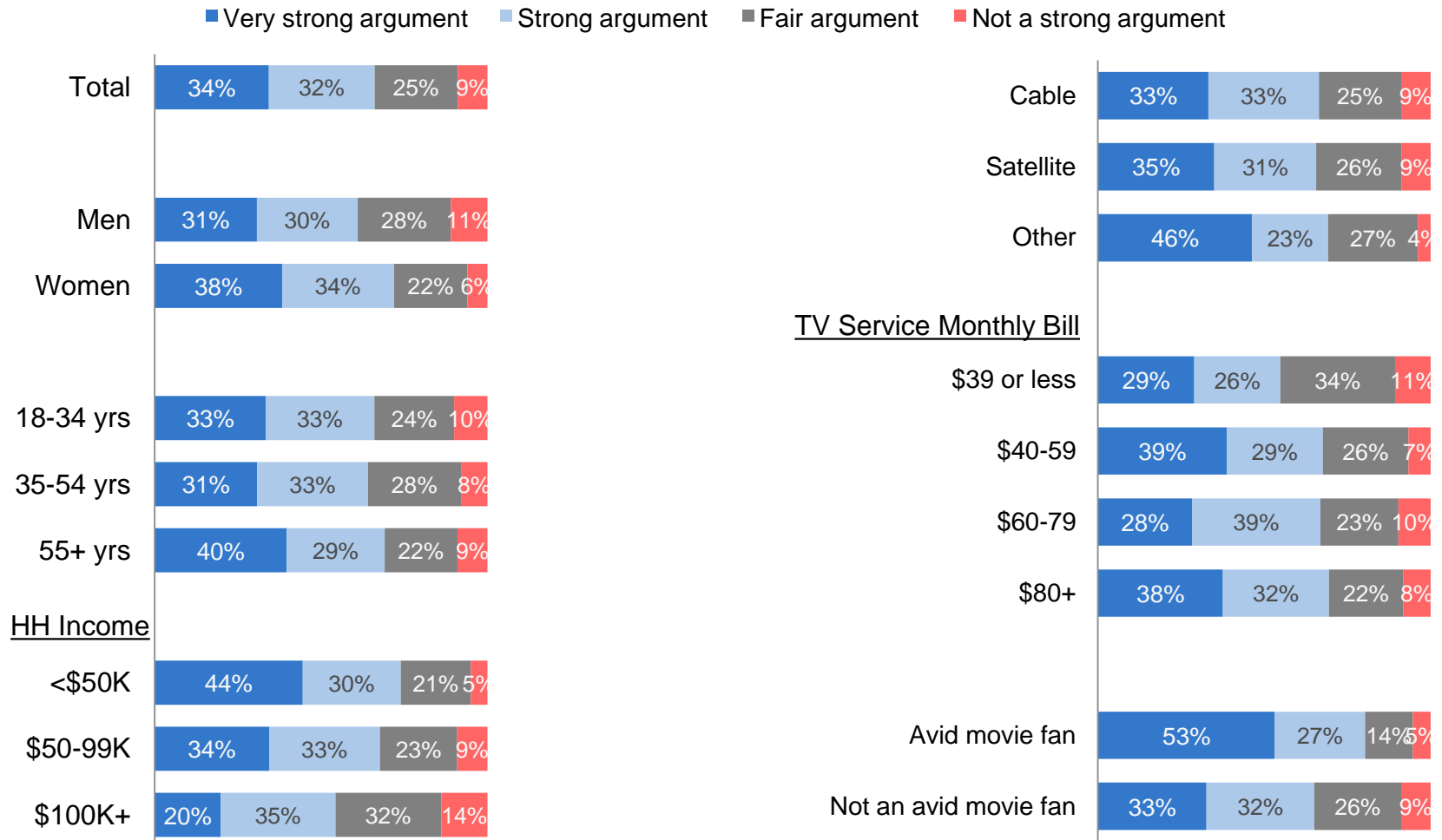
This channel will mean more Canadians can make careers and strengthen and grow our filmed entertainment industry



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

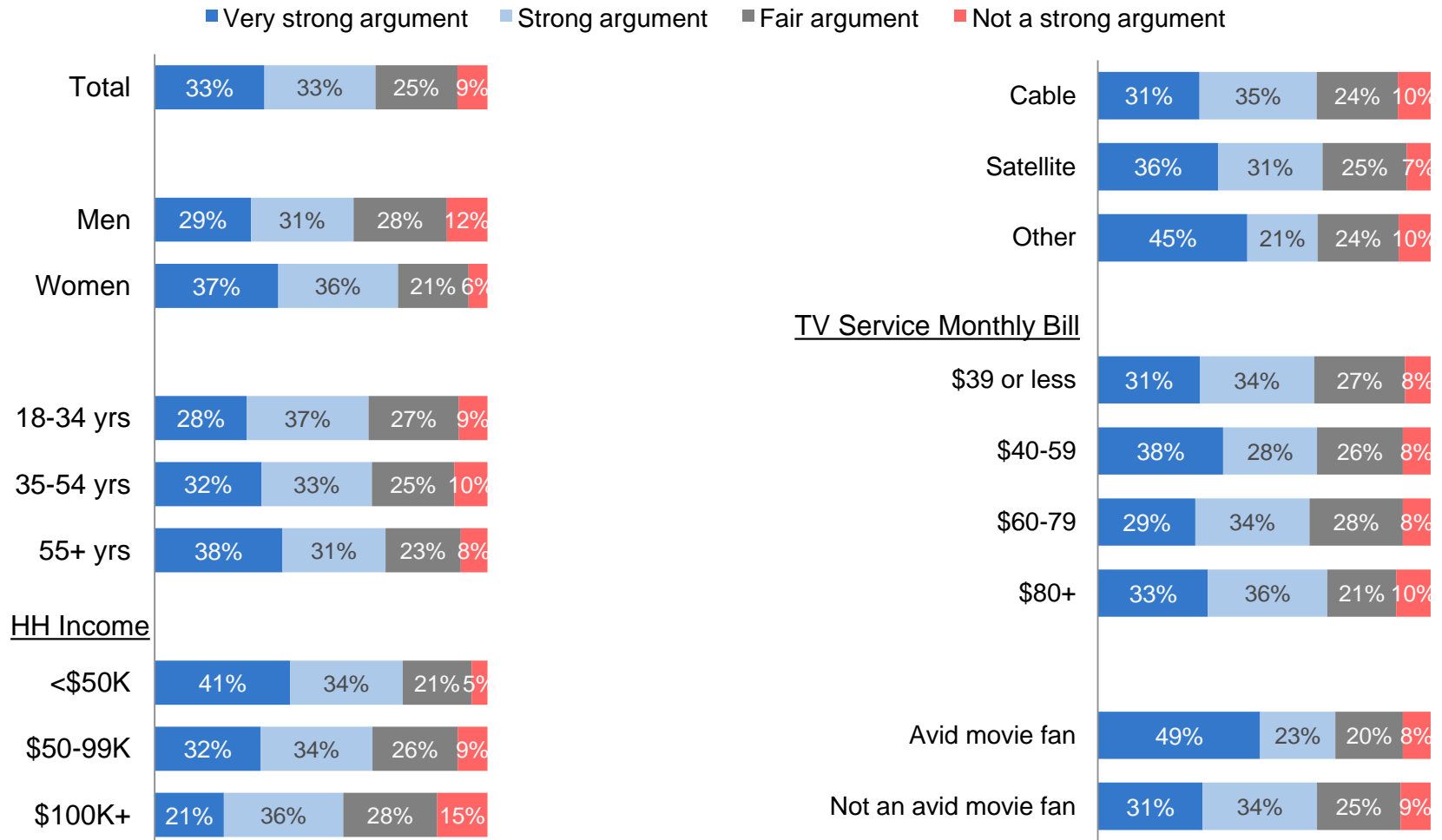
Regardless of whether I or other people might watch this channel, we should get behind it because of the opportunities it means for young Canadians to find job and career opportunities



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

Regardless of whether I or other people might watch this channel, we should get behind it because of the opportunities it means for Canada to compete in the global entertainment market

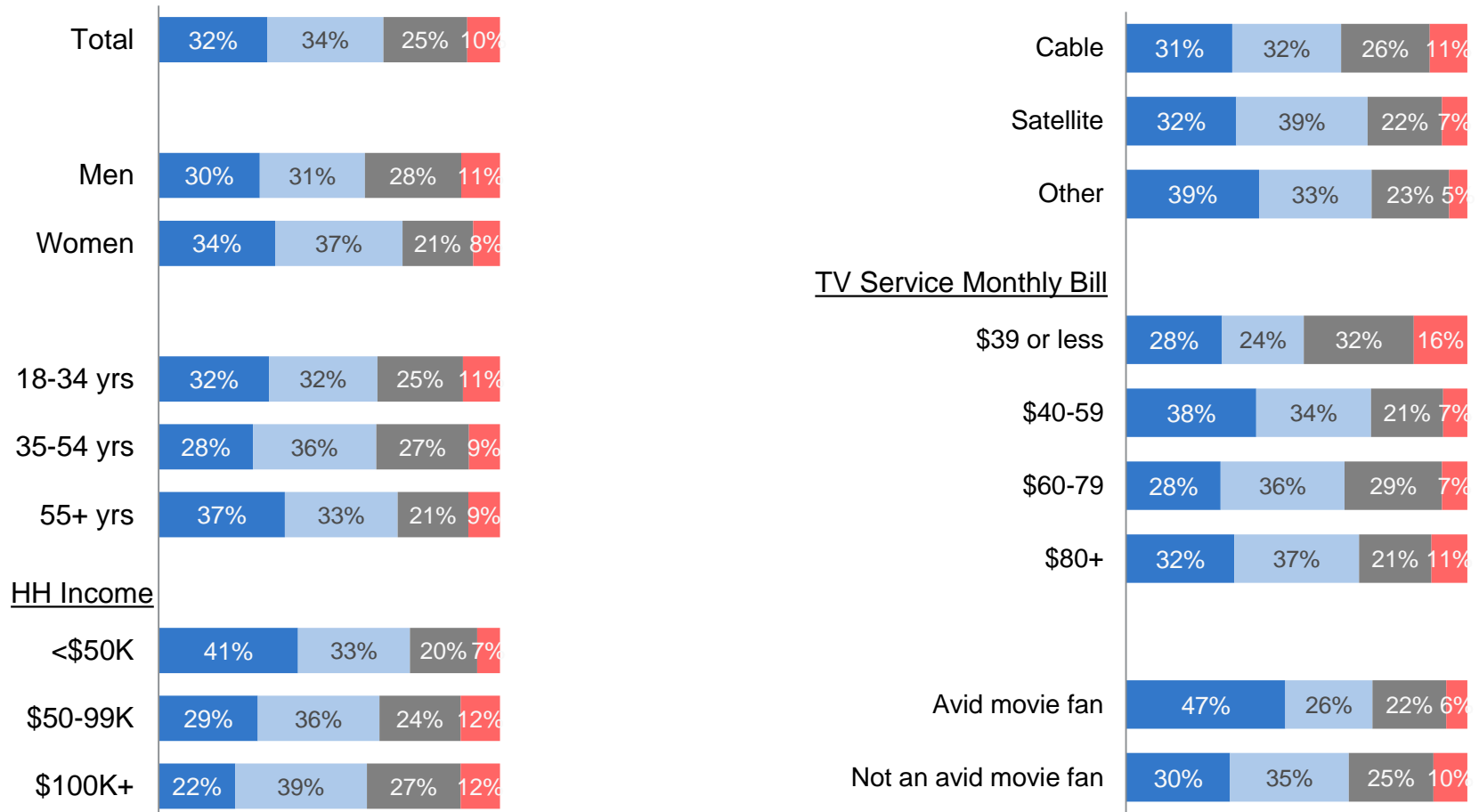


Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

Canadians subsidize the production of Canadian feature films with our tax credits but these days they are often not shown to people, so a channel like this would allow our investment as taxpayers to work harder

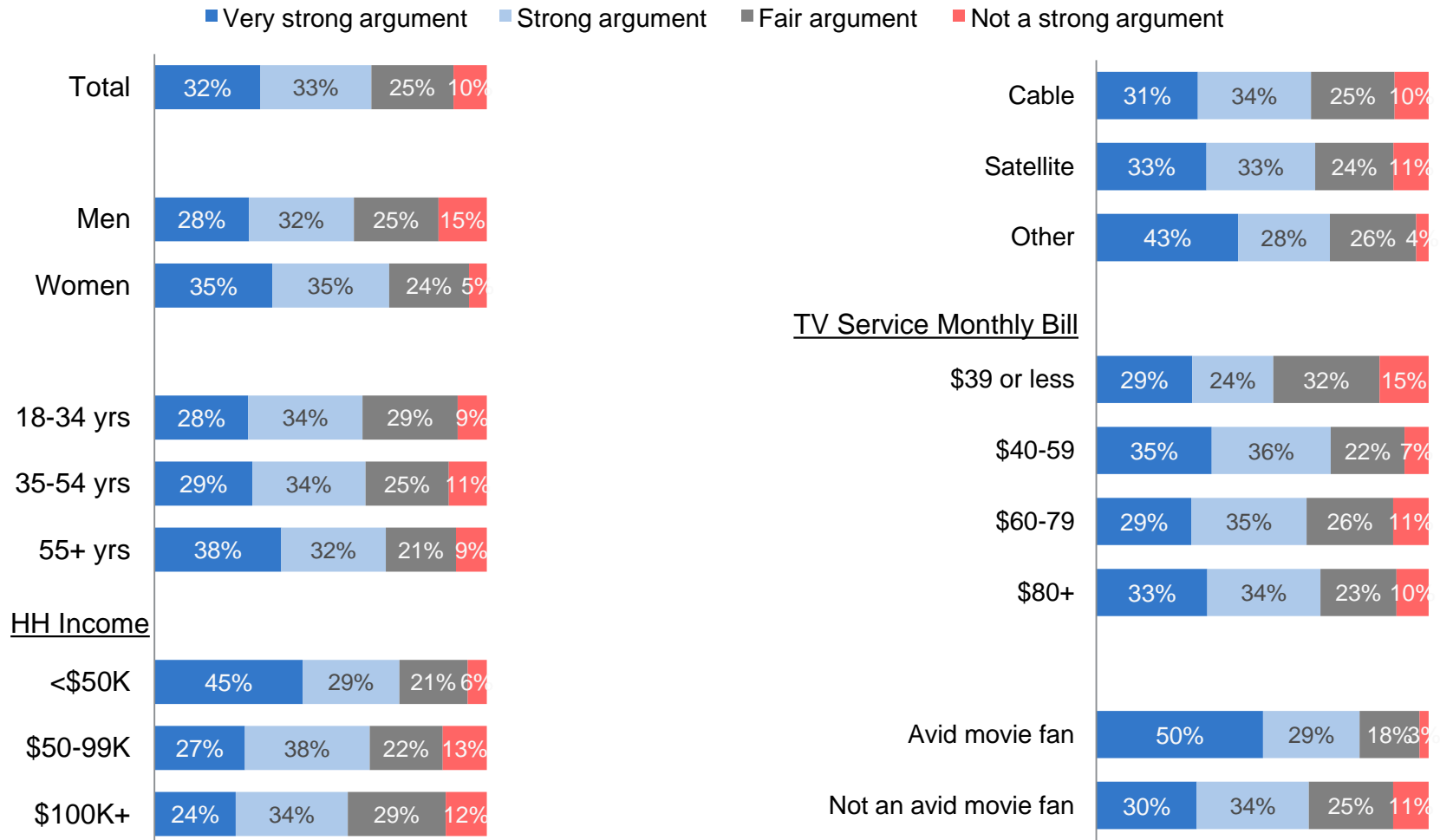
■ Very strong argument ■ Strong argument ■ Fair argument ■ Not a strong argument



Persuasiveness of Arguments in Support of Proposed Channel

Please tell us how persuasive you find each of these arguments:

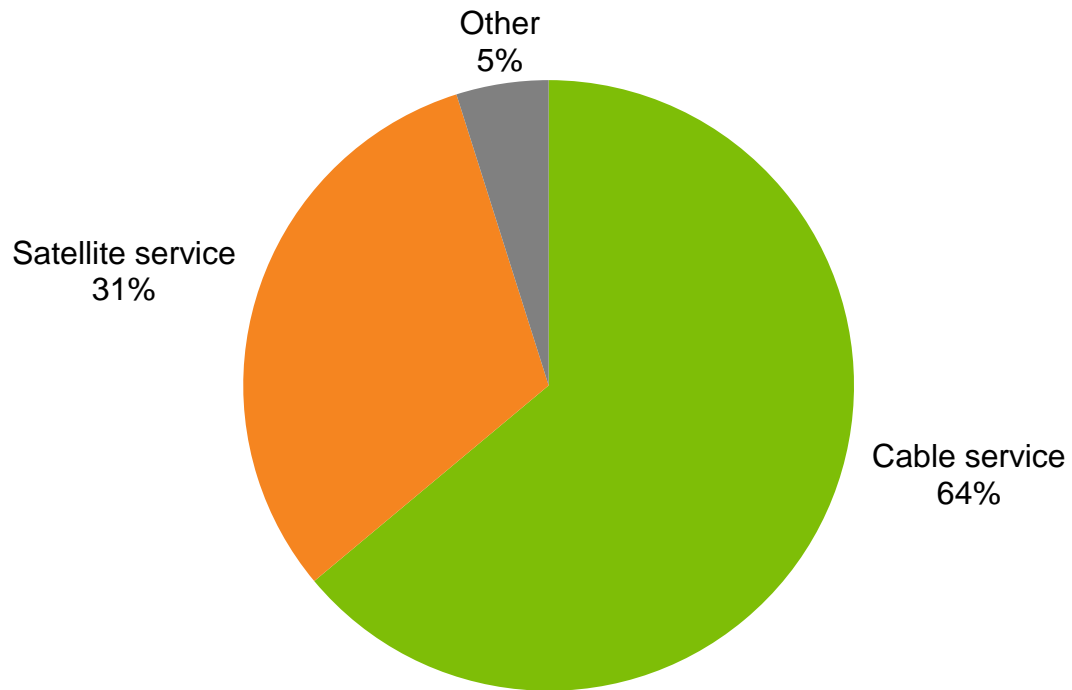
The arts and film are important areas of growth in the economy of the world and Canada can't afford to be left behind, we need a channel like this to help nurture and expand our talent



Appendix

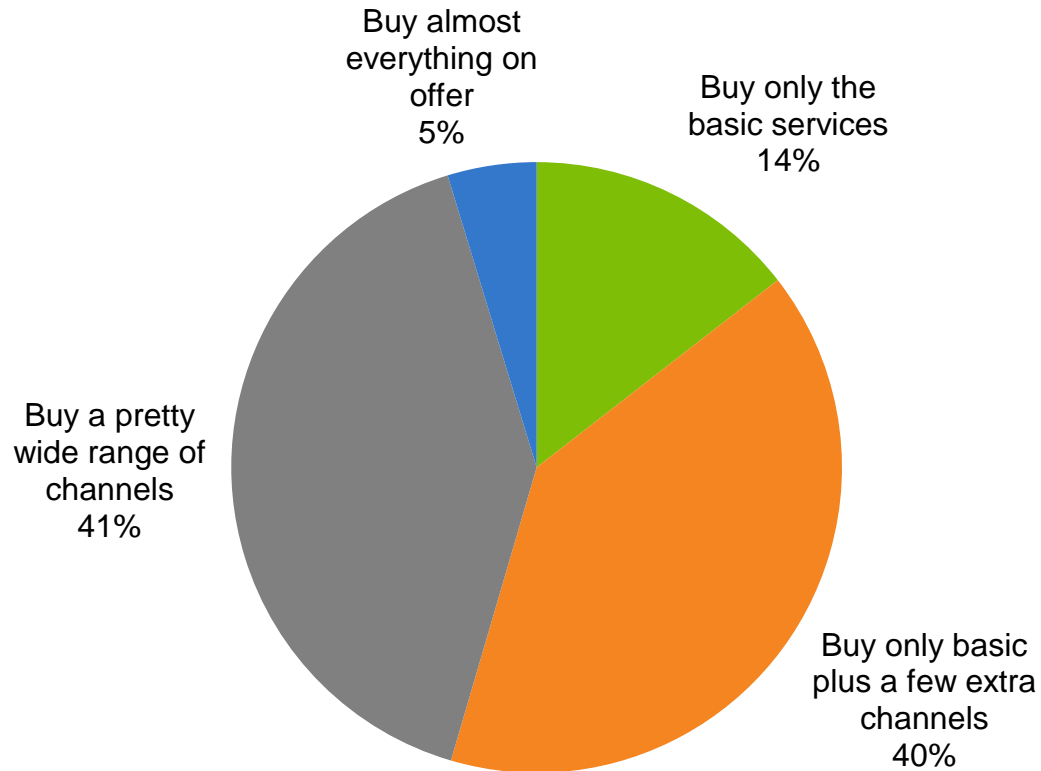
TV Service Provider

Which of these best describes the TV service in your household?



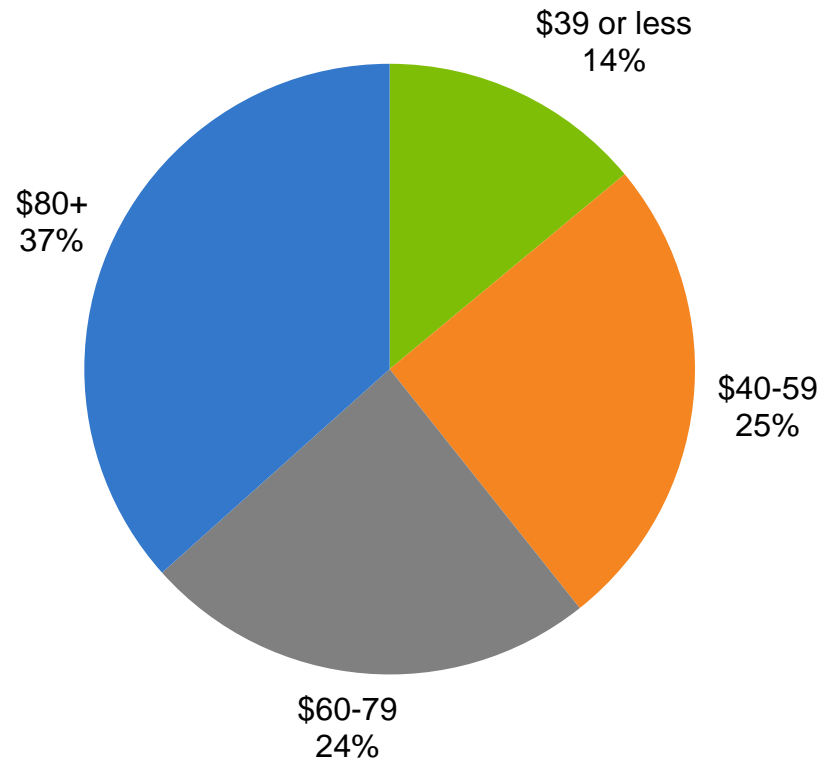
TV Service Package Type

In terms of the TV services you subscribe to at home, which best describes you?



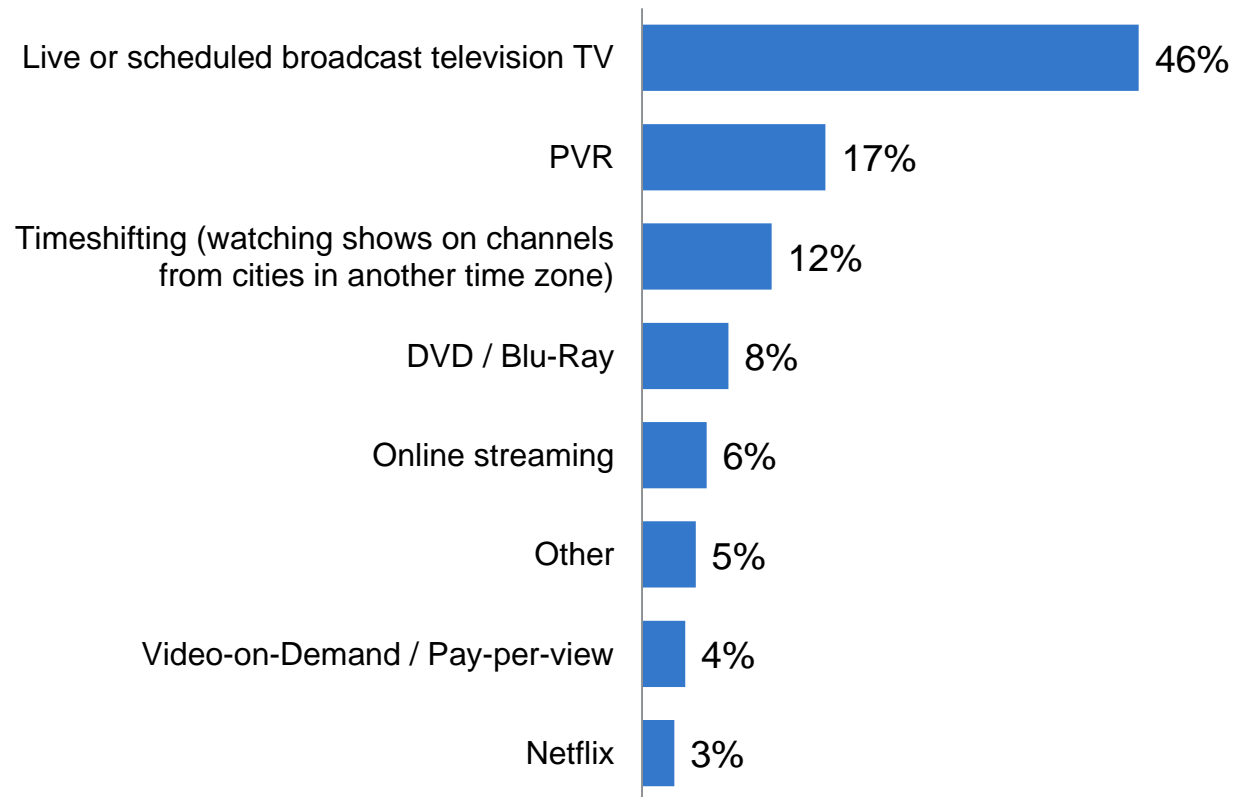
TV Service Monthly Bill

How much do you spend on TV service per month? Is it...



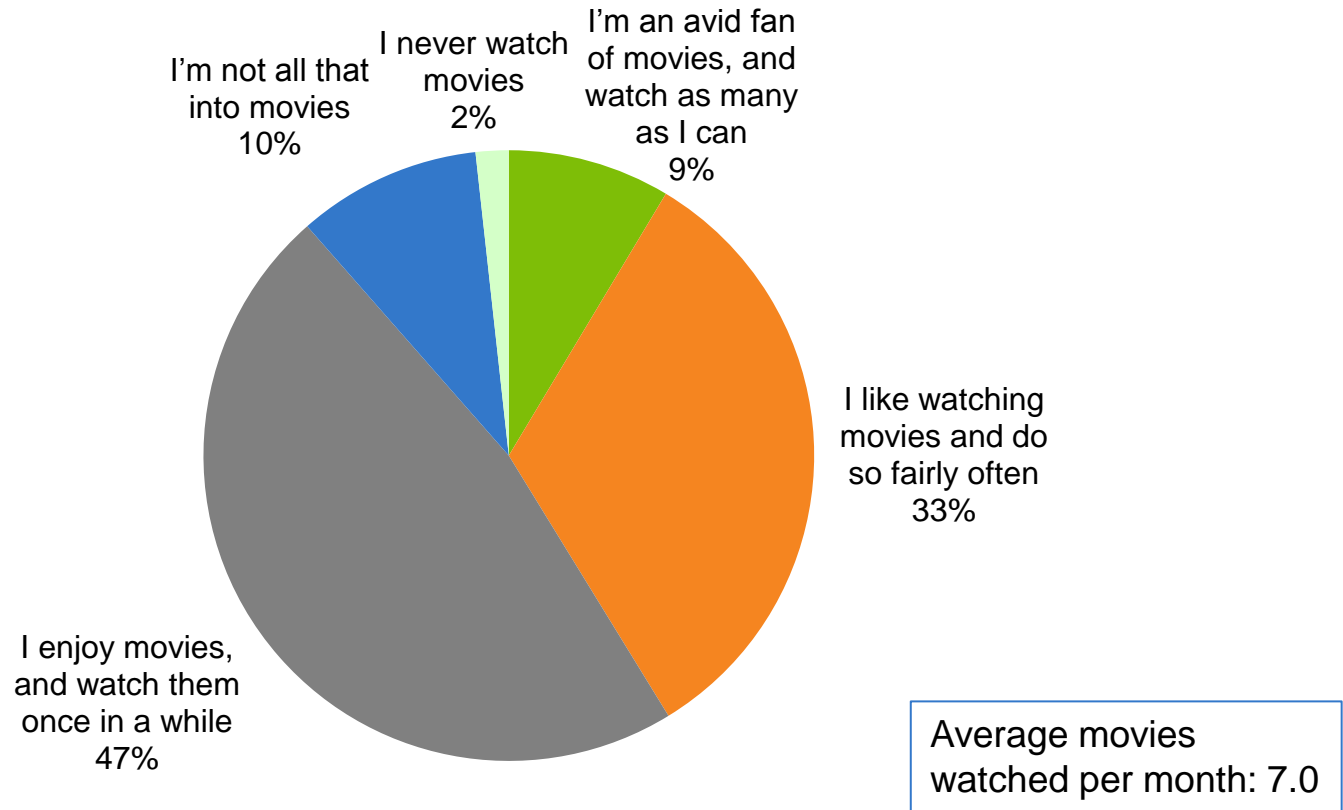
Average % of Monthly TV Viewing by Source

In a typical month, what percentage of your total TV viewing is comprised of the following?



Full Length Movie Viewership

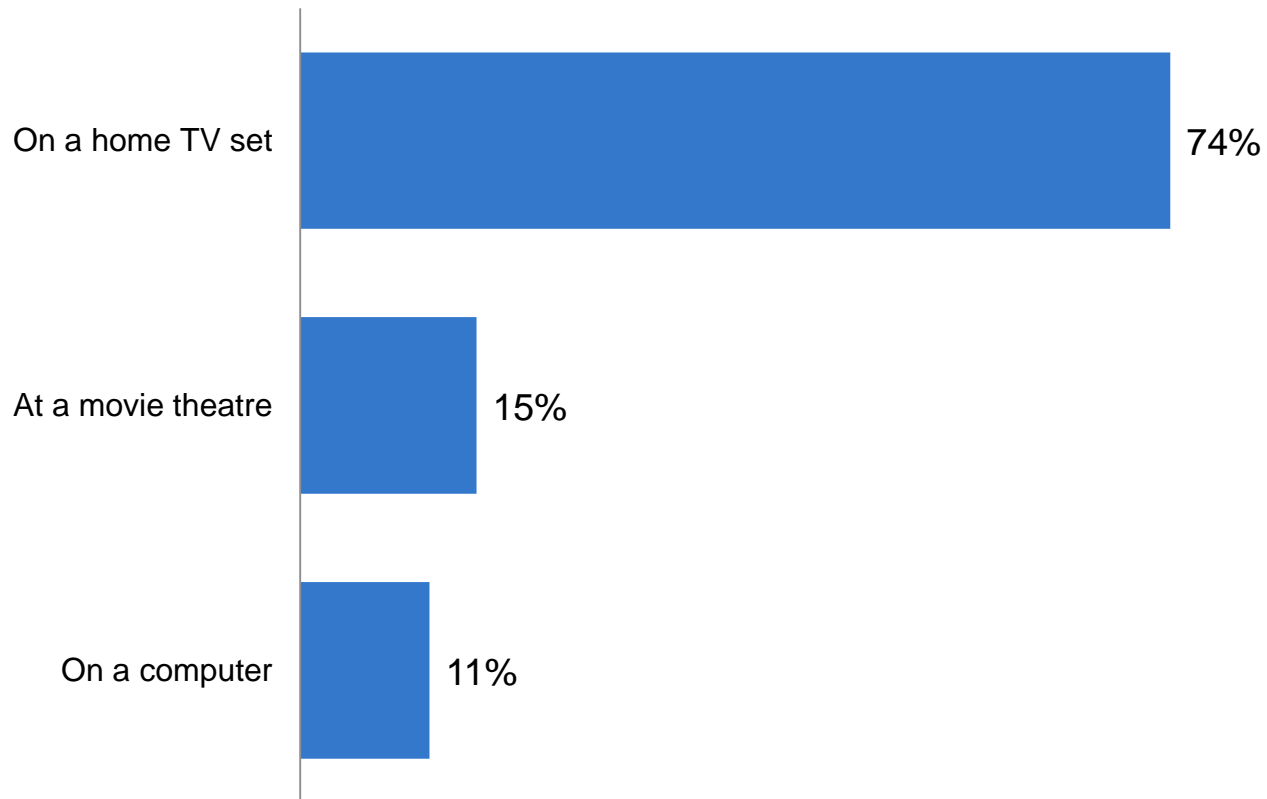
When it comes to full length movies, which best describes you?



In total, how many, if any, movies do you watch in the average month?

Average % of Movie Watching By Screen, Among Movie Watchers

Of all the movies you watch, what percentage would you say you watch in each of the following ways?



Average % of Movie Watching By Source, Among Personal Screen Movie Watchers

Of all the movies you watch on a personal screen (that is, not at a movie theatre), what percentage would you say you watch in each of the following ways?

