

# Appendix 3

## CAB Technology Adoption Analysis

### Broadcasting Public Notice CRTC 2006-72



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Canadian Association of Broadcasters  
L'Association canadienne des radiodiffuseurs

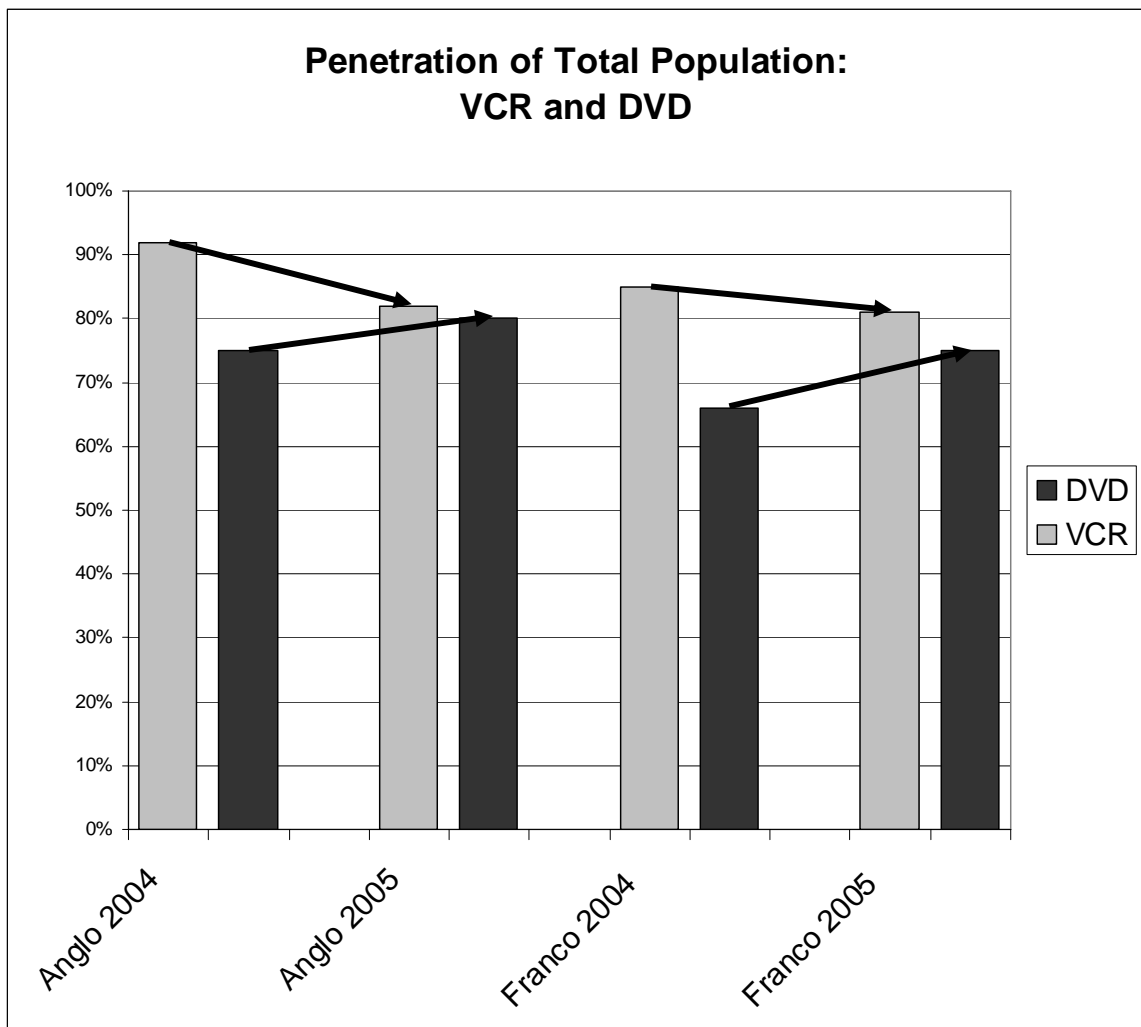
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## Introduction

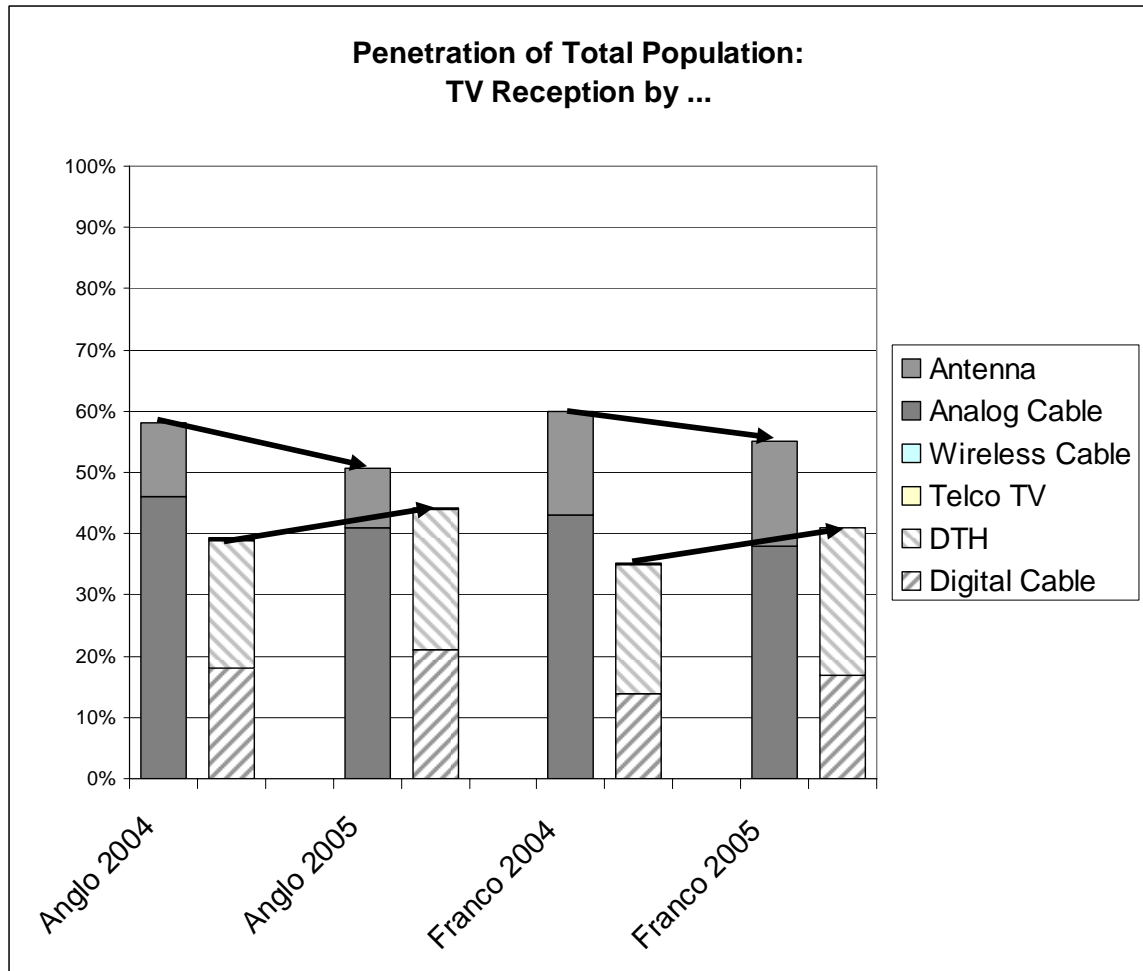
1. This report addresses the adoption of new broadcast-related technologies by Canadian consumers.
2. The analysis contained in this report is based on data provided by CBC/Radio-Canada Research from telephone interviews of 12,000 Canadians (6,000 francophone adults and 6,000 anglophone adults (18+)), an annual data-gathering project known as the Media Technology Monitor. Details concerning the methodology of this project, including a copy of the relevant questions used in the interviews, are included as an attachment to this report..
3. Other Canadian and international examples are drawn largely from information contained in the *CAB Industry Analysis and Monitoring Report* compiled by Armstrong Consulting and other research placed in the public domain.
4. The report is organized into four main sections:
  - i. The current status of the digital transition; i.e. the extent to which anglophone and francophone Canadians are adopting digital technologies to replace analog in their use of video and audio broadcasting content.
  - ii. How Canadian consumers access digital content – what platforms are they favouring as they move into digital?
  - iii. Is there one audience or many, with distinct behaviours? How do adoption and usage patterns vary by region, demographics and income?
  - iv. What main observations can be drawn from this data?

## I - The current status of the digital transition

5. The world of broadcasting has been engaged in the digital transition for a long time. The first digital recording devices were in common use by the early 1980s, and by the 1990s the arrival of digital compression techniques for distribution of signals, and ultimately broadcasting itself, was in full swing.
6. However, when dealing with a consumer market, there is always an extended period of adoption as the new technologies gradually replace or displace the old ones. Full replacement does not always occur – a half-century after the arrival of FM broadcasting in radio, AM is still with us, albeit in a different role, because of unique coverage characteristics that continue to give it value for a part of the audience.
7. So the question is, where is Canada now, in terms of the digital transition?
8. Some technologies show a clear and classic “replacement” scenario. For example, the DVD is a clear replacement for the VCR.



9. From the data, it can be seen that the penetration of VCRs is falling as the population ceases to use them and stops replacing old machines – while the penetration of DVDs, already very high, is still increasing.
10. Can the same be said about the way consumers receive broadcasting services? Is digital replacing analog?



11. Again, a similar trend can be observed, if one looks at the main ways in which people receive TV<sup>1</sup>.
12. The biggest difference that can be noticed from the two charts is that the penetration of the digital technology is much lower in the case of broadcast reception. Though it has been available for roughly the same time frame as DVD, it has not caught the public's attention to the same degree.

<sup>1</sup> Note that neither of these studies is a usage study, but simply a penetration study. Therefore, some VCR owners may not be using them anymore. Equally, some who have digital cable may still be using analog part of the time, and some who have DTH may use an antenna to receive some local analog signals.

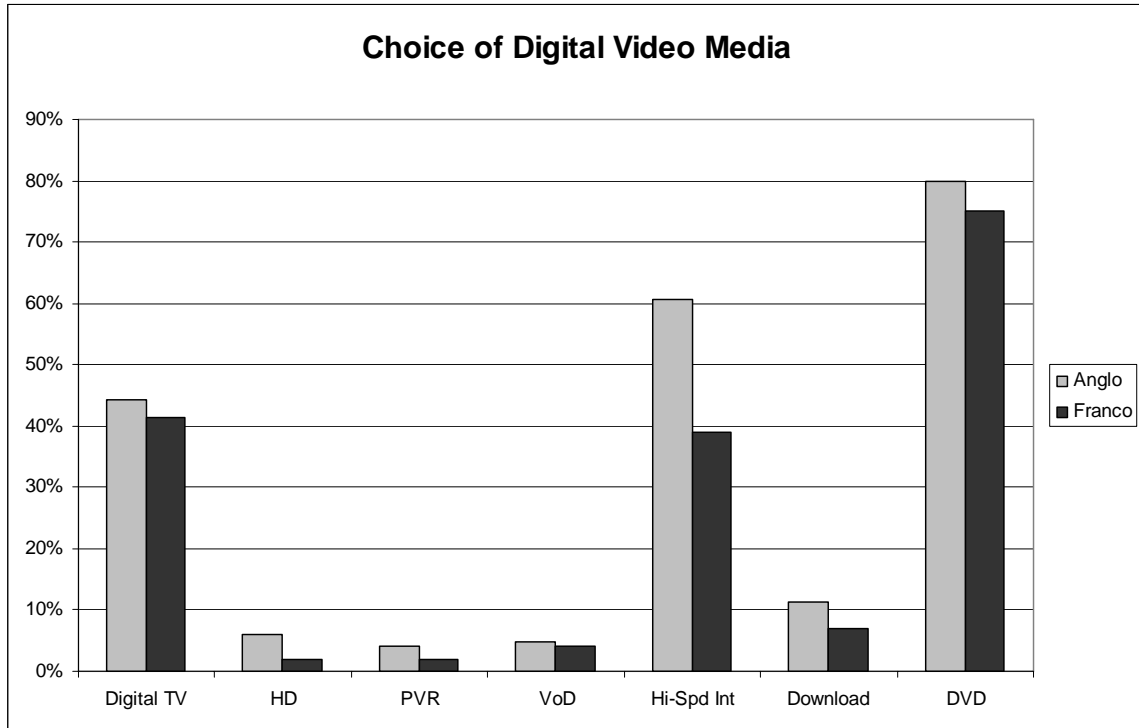
13. In fact, other data suggest that the transition will continue to be slower. When asked about their intentions to “go digital”,
- Only 6% of francophone and 3% of anglophone analog cable subscribers surveyed “will definitely subscribe” to digital cable in the next 12 months.
  - Anglophone and francophone analog cable subscribers who intend to subscribe to digital cable are more likely to be between 35 and 49 years old and earn an annual income of more than \$35,000. Interest among francophone and anglophones in subscribing to digital cable is consistent with the amount of TV they watch.
14. For the remaining users of antennas (10% anglophone, 17% francophone) to move to some form of BDU service may also take some time:
- Only 8% of off-air francophone viewers and 4% of anglophone off-air viewers surveyed “will definitely subscribe” to a cable TV, satellite TV or some other type of TV service in the next 12 months.
  - Off-air francophone viewers who intend to subscribe to a TV service are more likely to be aged 18-34 and are lower income earners \$35,000. There is no relationship to level of TV viewing among francophones who indicated they intend to subscribe to a TV service.
  - Off-air anglophone viewers that intend to subscribe to a TV service are more likely to be aged 18-34, are lower income earners (<\$35,000/year) and are heavy TV viewers.

### **Observations**

15. From this data, one can conclude that the direction of the transition is absolutely clear, but its speed may be slower than is sometimes projected.
16. This can be both a positive and a negative: positive, in the sense that there is still time to adapt to the effects of the digital transition; negative in that the longer it takes, the more costly it may be as parallel analog and digital infrastructures may have to be maintained on several delivery platforms.

## IIa - How consumers access content - video

17. The data provided from the *Media Technology Monitor* permits comparisons of what platforms for the delivery of video media are used by Canadians. The following graph indicates some of these results.



18. Three of these are “platforms” – Digital TV, High-Speed Internet, and DVD – and what the data shows is penetration, i.e. what percentage of Canadians have these technologies in their homes.

19. For the anglophone population, clearly DVD is the most popular, but High-speed Internet has also taken off and has over 60% penetration. Digital TV is still not in the majority compared to analog.

20. The francophone population is similar but slightly lower than the anglophone population with respect to DVD and analog TV, but well behind when it comes to the adoption of fast connections to the Internet.

21. Two of the other bars represent subcategories of digital television: high-definition and the PVR. Only 6% of anglophones and 2% of francophones have the ability to receive digital high-definition signals at this time; and only 4% of Anglophones and 2% of francophones have PVRs. (More have HDTV displays than have the ability to receive HDTV signals.)

22. Finally, we have an interesting comparison in the VOD and Video Download columns. The question asked in these two cases was one of usage, i.e. had the

respondent used video-on-demand in the last month, or had they downloaded a video in the last month.

23. These two activities, while similar, are not identical of course. Not only the platform is different, but the price and even the availability, since only some BDUs offer video-on-demand, and high-speed Internet is not uniformly available. Nonetheless, it is interesting that nearly twice as many Canadians (11% of anglophones and 7% of francophones) had downloaded video on the Internet in the last month than had used video on demand (5% anglophone, 4% francophone) in the same period.
24. To some extent, availability can be factored in: at the time of being surveyed, 28% of francophone digital cable subscribers who had access to VOD had watched a VOD program in the past month – equally, 28% of anglophone digital cable subscribers had watched a VOD program in the past month.
25. Francophone VOD users are more likely to be male, be young adults (18-34), have a college/CEGEP diploma, have a high annual income (\$75,000+), have kids in the home under the age of 18, and are moderate TV viewers (11-21 hrs/wk). Anglophone VOD users are more likely to be male, be less than 50 years old, have a community college diploma, have a high annual income (\$75,000+), have kids in the home under the age of 18, and are moderate TV viewers (10-20 hrs/wk).
26. Three-quarters (76%) of anglophone VOD users use the service at least once a month, 35% watch VOD programs at least once a week and 14% use it several times a week. 83% of francophone VOD users use the service at least once a month, 36% watch VOD programs at least once a week, and 11% use it several times a week.
27. Likewise, 15% of anglophone Internet users said they had downloaded video (includes newscasts, TV programs or movies available over the Internet) in the past month. Anglophone video downloaders tend to be male, younger adults aged 18-34 and are heavy Internet users (10+ hrs/wk). 11% of francophone Internet users indicated that they had downloaded video in the past month. Francophone video downloaders tend to be male, younger adults aged 18-34, lower income earners and are heavy Internet users (10+ hrs/wk).
28. Among anglophone video downloaders, 9% download video daily and 42% download video at least on a weekly basis. Among francophone video downloaders, 11% download video daily and 48% download video at least on a weekly basis.
29. These levels can not simply be projected across the entire population at some future date, however, since some do not use these technologies because they are not available while others have chosen not to avail themselves of the platforms which would permit these activities.

## Future growth

30. Respondents were again asked about their intentions with respect to these technologies:

- HDTV purchase intent:
  - 3% of anglophones and francophones 18+ who do not have an HDTV set indicate an intention to (“definitely will”) buy an HDTV set in the next 12 months.
  - Those most likely to purchase are between 18 and 34 years of age and make more than \$75,000 a year. Anglophones who are moderate (10-20 hrs/wk) and heavy (20+ hrs/wk) TV viewers are also most likely to purchase an HDTV set whereas there is no relationship to TV viewing among francophones. Light, moderate and heavy francophone TV viewers are just as likely to purchase an HDTV set.
- PVR purchase/rental intent:
  - 2% of anglophone and 3% of francophone Digital TV subscribers who do not own a PVR indicate that they definitely will purchase a PVR in the next 12 months
  - Anglophones who intend to purchase or rent a PVR in the next 12 months are more likely to male, between 35 and 49 years of age, have children in the home, and are moderate (10-20 hrs/wk) to heavy (20+ hrs/wk) TV viewers. Francophones who intend to purchase or rent a PVR in the next 12 months are more likely to be white collar workers, and have a high annual income (\$75,000+).

## Other Data Sources

31. Outside Canada, a variety of projections are available:

### 32. HDTV – international

- JupiterResearch firm predicts that HDTV monitors will grow from an installed base of 13 million in 2004 to 74 million by 2010. However, the researchers estimated that less than four million HDTV households were receiving HDTV service at the end of last year, a number predicted to grow to 69 million by 2010.
- According to the State of HDTV Technology 2006, Nielsen Media Research data indicates that 285 million sets are used in the country, of which 109.7 million are US TV HH. Relative to the total 285 million US TV sets inventory, the report indicates that HD set adoption is still at an early stage of market penetration, having only reached 10%.
- Research firm In-Stat says that households with HDTV service are projected to grow from 15 million in mid-2006 to 20.3 million at the end of 2006, world-wide. The report notes that this growth is only occurring in a few countries even though several new countries have introduced HDTV service this year.

- This research also found that as of mid-2006, the U.S. and Japan accounted for 91% of all worldwide HDTV households. Other countries with significant numbers of HDTV households include Canada, Australia, and South Korea. By the end of 2009, In-Stat is projecting that the number of HDTV households will exceed 55 million.
- The report also found that there is still a "disconnect" between HD services and the penetration of HDTV sets. Currently, only one-third of US households with HD-capable TV sets are actually using them to watch HD programming.

### 33. PVR – international

- A study by T-TAM (Total TV Audience Monitor) found that only 6% of PVR owners' total viewing is time shifted and that PVR owners actually watch more television than the average viewer (Sky Retailer, April 27 2006). However, according to a study by Leichtman Research Group, despite rapid increases in the number of PVR households in the US, DVR viewing still accounts for only 4% of television use (CED Magazine, July 28, 2006).
- The Connecticut based technology research firm, JupiterResearch, predicted PVRs will grow from an installed base of seven million households at the end of 2004 to 55 million by 2010 and will be in 47 percent of U.S. households in the next five years. (DTV Forecast, 2005-2010)
- An item in the Calgary Herald notes that PVR equipped viewers watch 90% of their shows live and 82% in prime time. According to CBS research, 66% of viewers who delay a show watch it before the next morning, and 80% within two days. Moreover, PVR viewers record 77% of their shows from the main networks and only 23% from cable, although viewing is otherwise relatively balanced.

### 34. Hi-Speed Internet - international

- In the US, the number of high speed Internet households increased by 33% in 2005, from 37.9 million to 50.2 million (FCC, July 26 2006).
- A comScore study shows that 18% of consumers are now viewing video on line and the amount of time that they spend viewing this content is increasing, from 85 minutes/month in October 2005 to 100 minutes/month in March 2006 (eMarketer, May 26 2006 and Business Week, May 30 2006).
- The study also indicated that user created and social network content (e.g. YouTube and MySpace) are now the two most popular content categories on the Internet.
- YouTube has now surpassed 100 million videos served per day and is the market leader with a 29% share of the online video market. (Reuters, July 17 2006). In addition, MySpace has a huge traffic flow, attracting about 5% of all Internet visits. (Wired, June 28 2006).

## IIB - How Consumers Access Audio Content

35. Because of the newness of platforms like satellite radio, digital radio, broadcasting to mobile etc., this report does not deal comprehensively with the replacement of analog radio by all of its digital alternatives: satellite radio, Internet radio and podcasting, and radio delivered via mobile phone.

36. However, one can note several interesting usage habits of Canadians.

### 37. Downloading music

- When surveyed, about 20% of the adult anglophone population (26% of Internet users) said they had downloaded music in the past month. Anglophone music downloaders tend to be male, young adults aged 18-34, white collar workers and are heavy Internet users (10+ hrs/wk).
- 12% of francophones (18% of Internet users) indicated they had downloaded music in the past month. Francophone music downloaders tend to be male, younger adults aged 18-34, are lower income earners and heavy Internet users (10+ hrs/wk).
- Among anglophone music downloaders, 12% download music daily and 48% download music at least on a weekly basis. Among francophone music downloaders, 12% download music daily and 48% download music at least on a weekly basis.

38. These are quite substantial levels when compared to other digital media activities, and they are supported in general terms by other studies.

- According to CRIA's research, of the 63% of Canadians who have access to a PC, Mac or IBM, over one-third (36%) admit to having downloaded music files to their computer from the Internet. The propensity to download increases as age declines. Similarly, males (40%) are more likely to have downloaded music files than females (32%).
- International:
  - One in four teens have purchased downloadable music in the US.
  - 21% of 18 to 24 year olds and 20% of 25 to 34 year-olds have bought downloadable music online (from *The Infinite Dial: Radio's Digital Platforms*)

### 39. Internet Radio

- International:
  - More than one in five Americans had listened to Internet radio in the past month. The estimated monthly audience for Internet radio is more than 52 million. The research found that the weekly Internet radio audience has increased 50% over the last year. Twelve percent of Americans age 12+ have listened to Internet radio in the past week; a 50% increase over the 2005 estimate of 8%.

- The study found that the weekly Internet radio audience skews male and attracts young adults. 58% of weekly Internet radio listeners are men, 41% of listeners are between the ages of 18 and 34 and are 36% more likely to live in a household with an annual income of \$100,000 or higher when compared to the general U.S. population age 18 and older. (from *The Infinite Dial: Radio's Digital Platforms*)

#### 40. Podcasting

- A Sequentia Communications research report which surveyed 928 people online with 97 per cent of them identifying themselves as Canadian, indicated that most podcast listeners are in the 24-44 age range and that they are almost evenly split between men and women.
- International:
  - According to *The Economics of Podcasting*, a report released by Nielsen Analytics this year:
    - more than 6% of U.S. adults, or about nine million Web users, have downloaded podcasts in the past 30 days. The findings show that a significant percentage (38%), of active podcast downloaders say they are listening to radio less often.
    - Overall, 60 percent of respondents surveyed said they "always" fast forward past commercials in their podcasts. Women were more likely to fast forward than men, with 67 percent saying they "always fast forward."
    - 72 percent of respondents who regularly download podcasts said they download an average of one to three podcasts per week.
  - According to research conducted by Arbitron, Edison Media Research in January/February 2006 entitled *The Infinite Dial: Radio's Digital Platforms*<sup>2</sup> the purpose of which was to determine Americans' use of traditional, online and satellite media:
    - The study also found that 11% of Americans have listened to an audio podcast. When given a detailed description of podcasting, more than 1 in 10 people age 12 and over said they have ever listened to an audio podcast. That translates to approximately 27 million Americans. One out of five Americans who have ever listened to an audio podcast are 12-17 years old and more than half (53%) are under the age of 35.

#### 41. Satellite Radio

- International:
  - 18% of those who do not currently subscribe to satellite radio (XM or Sirius) say they are likely to subscribe in the next 12 months. Only 4% of non-subscribers to satellite radio said they were "very" likely to subscribe in the next 12 months, while 82% said they were "not at all" likely to subscribe to satellite radio in the next 12 months.

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<sup>2</sup> The study was based on 1,925 phone interviews conducted with respondents 12 and older chosen at random from a national sample of Arbitron's Fall 2005 survey diarykeepers.

- The study also found that the satellite radio audience more closely mirrors the age and gender profile of the average American than audiences of other digital forms of radio. 53% of satellite radio subscribers are male, and 18% are age 55 and older. More than one in four (27%) satellite radio subscribers have an annual household income of \$100,000. (from *The Infinite Dial: Radio's Digital Platforms*)
- According to the April 25, 2006 edition of eMarketer magazine, satellite radio subscribers are predicted to reach 35.6 million in the US by 2010.

#### 42. Digital Radio

- Internationally, digital radio is a mixed picture. Most jurisdictions have not had hugely successful rollouts. Technical issues continue in some areas as new platforms like DVB-H are proposed as alternatives to the existing standard DAB and the American-only alternative, HD-Radio. As far as consumers are concerned, the picture is widely varied:
  - In the *The Infinite Dial: Radio's Digital Platforms*, more than one-third of the respondents indicated that they were interested in HD Radio, the American Digital radio system. However, three-quarters of the “digital radio” audience predict they will continue listening the same amount to AM/FM radio.
  - In the UK, sales of digital radios (DAB) passed 1.2 million in 2005. In August, 2006, Dixons, the leading UK e-tailer of consumer electricals, announced it was discontinuing the sale of analogue radios. Digital radios are now outselling analogue radios by 30:1 at [dixons.co.uk](http://dixons.co.uk).<sup>3</sup>

#### 43. Mobile and portable devices – MP3 players

- International
  - The *Future of Portable Entertainment Devices* study, conducted by the Consumer Electronics Association in early April 2006, found roughly one in three online adults (54.1 million) owns a portable digital media device. They are more likely to be male, young, affluent and single.
    - The analysis points to the ease of transferring content, size and weight and the memory capacity of the device as the features most significantly impacting satisfaction of MP3 players.
    - 94% of those surveyed indicated that the most common use for their portable digital media players is to listen to music. More than half (52 percent) of owners say they use their portable digital media device in their vehicle, but the most common usage is in the home (66 percent).
    - 51% of portable digital media device owners have downloaded content from online sources.
    - Market research firm Harris Interactive's [AutoTechcast](#) reported that almost two-thirds (65 percent) of adult automobile owners who also have

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<sup>3</sup> [www.drdb.org](http://www.drdb.org)

iPods or other MP3 players use the device in their vehicles. Overall, about one in ten (12 percent) of all U.S. adult automobile owners also have iPods or MP3 players. Younger drivers, under 45 years of age, are most likely to use the device in their cars.

44. According to research conducted by Arbitron, Edison Media Research in January/February 2006 entitled *The Infinite Dial: Radio's Digital Platforms*<sup>4</sup> the purpose of which was to determine Americans' use of traditional, online and satellite media:
- Approximately 25% of consumers age 12 and over own either an iPod or other brand of portable digital music player. In terms of demographics, roughly half of all teenagers own an iPod or other portable digital music player compared to approximately one-third of adults age 18-34.
  - In fact, according to a 2005 study<sup>5</sup> released by Bridge Ratings that was based on interviews with 2000 people aged 12 to 24 year olds, 85% of the total sample would choose their MP3 player over traditional radio as their preferred option for music.
  - Moreover, when given a choice between listening to music over the Internet or traditional radio stations, 54% prefer the Internet while 30% prefer traditional radio.
  - The study revealed that 50% of the total sample listened to Internet radio, with 35% spending 1 hour a day listening to Internet radio and 22% spending between 1 and 2 hours a day. Conversely, only 2% of the total sample listened to satellite radio (either XM or Sirius). Among those who did listen, 25% spend more than 2 hours a day listening. 2 hours a week.
  - Conversely, only 2% of the total sample listened to satellite radio (either XM or Sirius). Among those who did listen, 25% spend more than 2 hours a day listening.

#### 45. Mobile and portable devices – mobile phones

- According to a 2005 study by TNS, an international market research group, almost one in five (19 percent) of all mobile phone owners worldwide now listen to music on their phones. However, in the U.S., only four percent of cell phone users listened to MP3s or digital music on their cell phone on a regular basis.
- Across the 15 countries covered by the study, 13 percent of all mobile phone users said that they use MP3 or digital music players on their phones daily or weekly.
- The United States ranked last in the study with only 4% reporting regular listening of music via their mobile phone. However, other countries reported high user levels with South Korea polling at 26%, Hong Kong at 23% and the United Kingdom at 19%.

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<sup>4</sup> The study was based on 1,925 phone interviews conducted with respondents 12 and older chosen at random from a national sample of Arbitron's Fall 2005 survey diarykeepers.

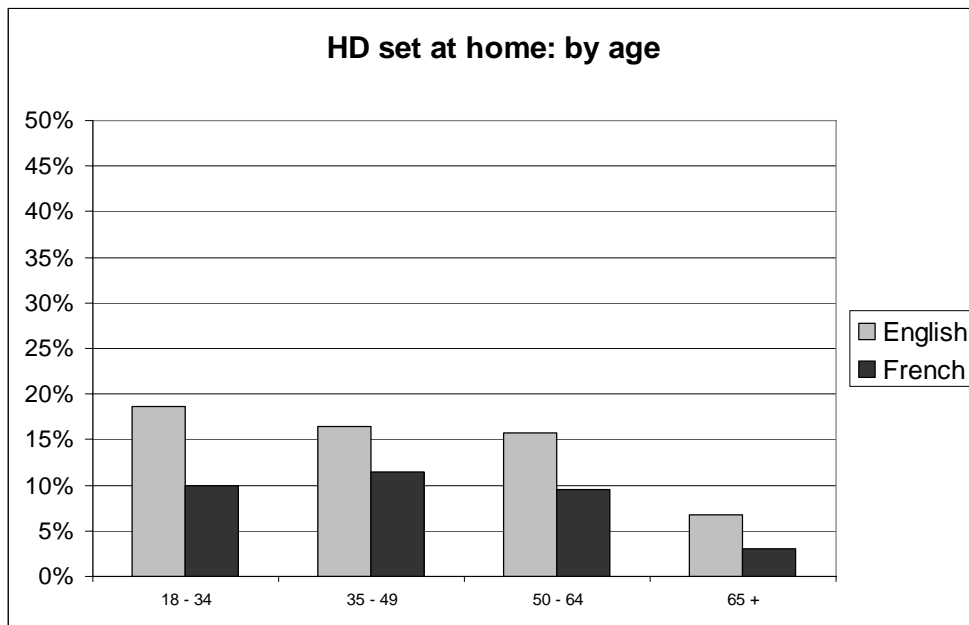
<sup>5</sup> The project was part of a University of Southern California Media Lab analysis entitled *How to Make Music Radio Appealing to the Next Generation*.

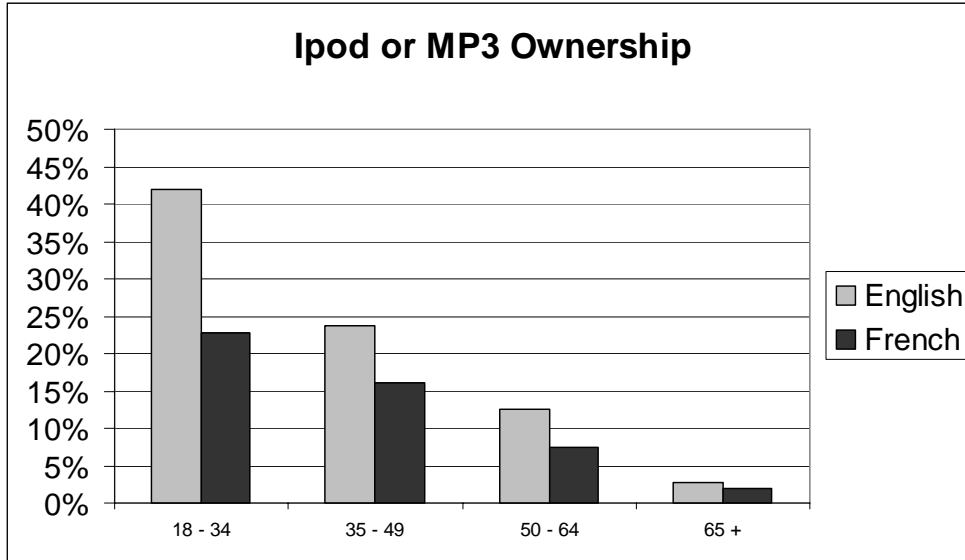
- In fact, more than a third (35 percent) of mobile phone users worldwide chose mobile music as one of the five applications they would like to start using, or use more of in the future.
- Respondents also showed interest in starting to use or use more of the following applications on their mobile phones: camera for photography (34 percent), SMS (28 percent), live radio (25 percent) and video camera (24 percent).

### III – A Variable Population

46. Analysis of the data makes it clear that in Canada, we are not dealing with a single population of media consumers, all of whom behave in roughly the same way. Differences of age, of language, of region, and of habit create separate populations with different behaviour.

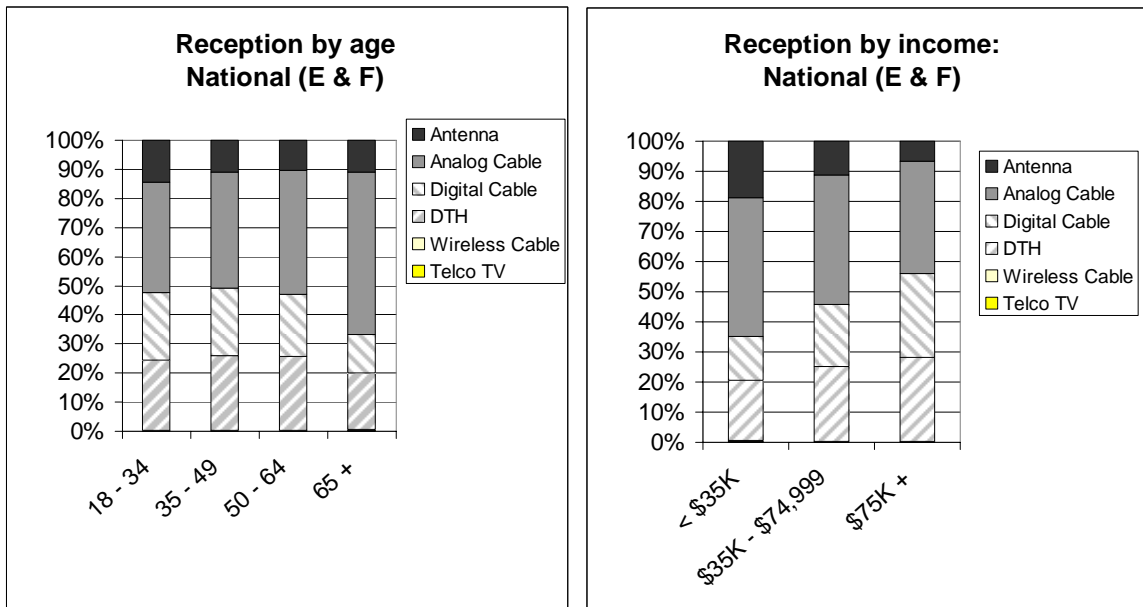
47. Consider these two graphs, for example:





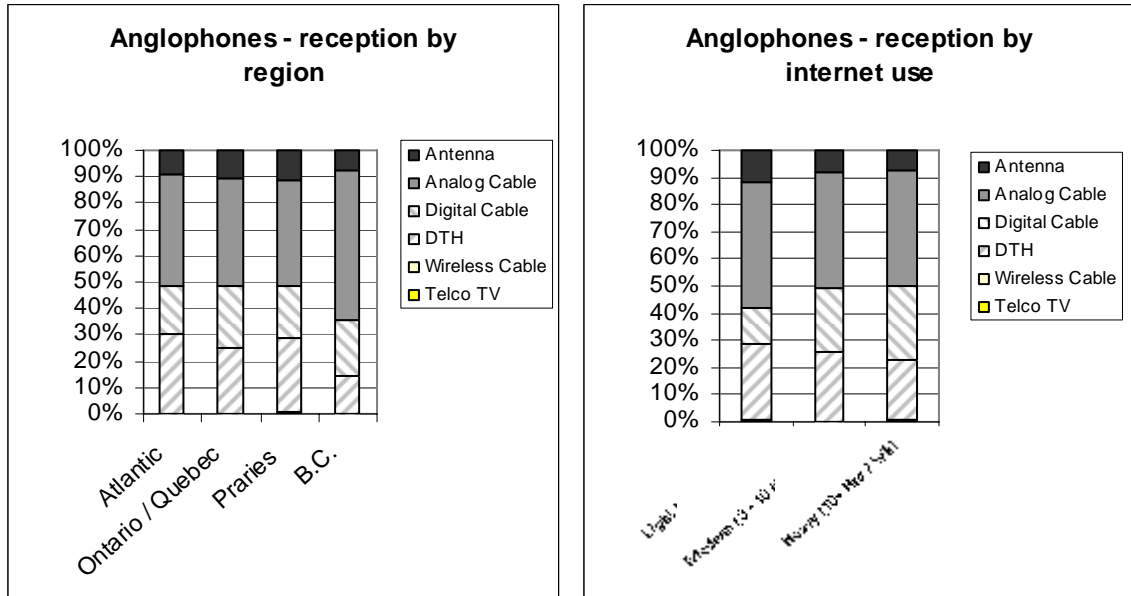
48. Clearly age is a predictor of adoption in both these cases, but with a much greater impact in the case of the small mobile devices than in the larger, home-bound high-definition display.

49. Age is by no means the only predictor, however.



50. Looking at the platform chosen for television reception for example, age is clearly significant in terms of digital choices, but so is income. Moreover, it is not as simple as “the young adopt”. The 18-34 television-using age group has a lower adoption of digital, and a higher use of antennas, than the older groups between 35-64. In part, this may be explained by lower income in that age group – since adoption of digital reception is clearly predicted by income.

51. But it is equally interesting that region is a major predictor, and that anglophone heavy internet users - major adopters of digital technology – are weaker in their adoption of digital television than light and medium Internet Users.



#### IV - Observations

52. There is much to be learned by looking at the population as a whole, and understanding its willingness to substitute one platform for another when it provides similar functionality. Analysis which looks at only one aspect of the population tends to encourage an understanding “in silos”, but Canadians, by their behaviour, reject such definitions.
53. There is more depth to the data available in the *Media Technology Monitor* than has been supplied here, but what has been analyzed shows several trends that deserve our attention, and which should be considered in examining any new policy to approach the broadcasting system.
54. First, the direction toward adoption of digital technology is clear.
55. Second, there are many differences within that direction, which should be understood lest parts of the population be left behind.
56. Third, in some respects the digital transition is less advanced than others. The level of analog and even over-the-air reception, and the speed with which this analog group – still more than half the population – is moving towards digital must be a part of any policy calculation. On the other hand, policy must also adapt for the

willingness of the more advanced media consumers to use “bypass” technologies like Internet video and audio download in place of traditional broadcast media and their digital alternatives.

57. Fourth, this view of the population suggests that many of the more advanced technologies are not so far advanced that it is too late to design measures that will adapt the goals of Canadian cultural policy to these new realities.

## Attachment

### Notes re survey methodology

- The results in the CBC/Radio Canada Media Technology Monitor 2005 are based on recent telephone interviews of a very large sample - 12,000 Canadians in French and English-language markets. The MTM is conducted annually by CBC Research and is used to track the adoption of media technologies and their progression through the adoption cycle.
- For the 2005 MTM, CROP Inc. conducted 6,000 telephone interviews with Francophones residing in Quebec and the francophone regions of Ontario and New Brunswick in the 4<sup>th</sup> quarter of 2005 (Oct. 25 to Dec. 19, 2005). The response rate was 53%.
- Foundation Research Group, Inc. interviewed 6,000 Anglophones residing in all regions of Canada, excluding the North, in the 1<sup>st</sup> quarter of 2006 (Jan. 31 to April 26, 2006). The response rate was 45%.
- Results based on the total sample of 12,000 Canadians are accurate within  $\pm 0.9$  percentage points 19 times out of 20. Results reported separately for Anglophones and Francophones, based on samples of 6,000, are accurate within  $\pm 1.3$  percentage points 19 times out of 20.

**Key Questions:**

**L'Observateur des technologies médias 2005 (OTM)  
Société Radio-Canada / CBC**

**Questions – Marchés francophones**

**VIDÉO****RÉCEPTION DE TÉLÉVISION**

Votre foyer est-il abonné à la télévision par câble, par satellite ou à un autre service de télévision? **SI PLUS D'UN SERVICE DE TÉLÉVISION EST CITÉ, INSCRIVEZ CELUI QUI EST CONSIDÉRÉ COMME LE SERVICE PRINCIPAL.**

1. Télévision par câble
2. Télévision par satellite
3. Service de câble sans fil
4. Télévision par réseau téléphonique (Québec et Ontario. : " Service ExpressVu pour condos ")
5. Possède une antenne (capte les stations de télévision conventionnelle accessibles gratuitement au moyen d'une antenne montée sur le toit, d'oreilles de lapin ou d'une antenne intégrée au téléviseur)
6. Autre (précisez) : \_\_\_\_\_
7. Non (capte les stations de télévision conventionnelle accessibles gratuitement au moyen d'une antenne montée sur le toit, d'oreilles de lapin ou d'une antenne intégrée au téléviseur)
8. Ne possède pas de téléviseur en état de marche
9. NSP/Refus - LISEZ LES DÉFINITIONS DES SERVICES DE TÉLÉVISION PAR CÂBLE, PAR SATELLITE ET HERTZIENNE. (ALT B ou Bouton définition en haut de votre écran)

Pour vous permettre de répondre à la question, je vais vous lire une série de définition...

**DÉFINITION DE LA TÉLÉVISION PAR CÂBLE:**

Pour avoir la télévision par câble, vous ou votre propriétaire payez des frais mensuels d'abonnement à un câblodistributeur comme Vidéotron ou Cogéco qui vous donne accès à des stations de télévision additionnelles.

### DÉFINITION DE LA TÉLÉVISION PAR SATELLITE:

Dans le cas de la télévision par satellite, vous ou votre propriétaire payez des frais mensuels d'abonnement à un fournisseur de service par satellite comme ExpressVu ou StarChoice pour recevoir des chaînes additionnelles. Pour capter la tv par satellite, vous devez avoir une antenne parabolique (soucoupe) à l'extérieur de votre maison et louer ou acheter le récepteur (ou décodeur).

### DÉFINITION DE LA TÉLÉVISION CONVENTIONNELLE/HERTZIENNE (SIGNAUX CAPTÉS AU MOYEN D'UNE ANTENNE):

Pour capter les stations de télévision conventionnelles accessibles gratuitement, il vous suffit d'avoir une antenne sur le toit, ou sur le dessus de votre téléviseur (qu'on appelle couramment des oreilles de lapin) ou bien une antenne intégrée à votre téléviseur, sans payer de frais d'abonnement.

### **CÂBLE CONVENTIONNEL OU CÂBLE NUMÉRIQUE**

Êtes-vous abonné au câble conventionnel ou au câble numérique? AU BESOIN, DITES : Pour pouvoir recevoir le câble numérique, vous devez louer ou acheter un boîtier numérique spécial (ou récepteur vidéo personnel RVP) de votre câblodistributeur. Le câble numérique permet d'avoir une image et un son de meilleure qualité, un plus grand choix de chaînes, des canaux de musique sans interruptions publicitaires et un télé-horaire interactif à l'écran.

1. Câble conventionnel (analogique)
2. Câble numérique
3. NSP/Refus

### **TÉLÉVISION CONVENTIONNELLE/HERTZIENNE – S'abonne à un service de télévision**

Comme vous le savez peut-être, il existe plusieurs types de services de télévision auxquels on peut s'abonner pour avoir accès à un plus grand nombre de chaînes et améliorer la réception des signaux, comme la télévision par câble ou satellite. Quelles sont les probabilités que dans votre foyer on s'abonne à un service de télévision par câble, par satellite ou à un autre type de service de télévision au cours des douze prochains mois? Est-ce...

1. très probable
2. assez probable
3. peu probable
4. OU pas du tout probable
5. Peut-être ou peut-être pas
6. Dépend du prix/service
7. J'ai déjà câble, satellite ou autre type de service de télévision
8. NSP/Refus

### **LA VIDÉO SUR DEMANDE**

Avec votre fournisseur de service vous avez peut-être accès à la vidéo sur demande qui vous permet de commander des films et d'autres genres d'émissions à partir d'un menu affiché à l'écran. Vous pouvez commander des films ou des émissions en tout temps et les regarder aussi souvent que vous le souhaitez à l'intérieur d'une période de 24 heures. Il y a des frais à payer pour chaque film ou émission commandés. Au cours du dernier mois, avez-vous regardé des émissions offertes par le service de vidéo sur demande? **AU BESOIN, DITES :** La vidéo sur demande ressemble beaucoup au service offert par votre magasin de location de vidéos. Vous payez des frais pour chaque film que vous choisissez. Durant l'écoute, vous pouvez interrompre le film et utilisez les commandes de rembobinage et d'avance rapide à volonté. Vous pouvez également regarder le film autant de fois qu'il vous plaira à l'intérieur d'une période de 24 heures. La seule différence, c'est qu'avec le service de vidéo sur demande, vous commandez le film de votre choix à votre câblodistributeur à partir de l'écran du téléviseur.

1. Oui
2. Non
3. Ne connaît pas ce service
4. Ne reçoit pas ce service
5. NSP/Refus

À quelle fréquence regardez-vous habituellement des films ou des émissions offertes par le service de vidéo sur demande? Est-ce...

1. plusieurs fois par semaine
2. au moins une fois par semaine
3. au moins une fois par mois
4. OU BIEN, moins d'une fois par mois
5. NSP/Refus

### **CÂBLE CONVENTIONNEL S'ABONNE AU CÂBLE NUMÉRIQUE**

Plus tôt, vous m'avez dit que vous étiez abonné au câble conventionnel. Vous pourriez recevoir le câble numérique qui permet d'avoir une image et un son de meilleure qualité, et plusieurs nouvelles chaînes spécialisées. Quelles sont les probabilités que dans votre foyer on s'abonne au câble numérique au cours des douze prochains mois? Est-ce... **AU BESOIN, DITES :** Pour pouvoir recevoir le câble numérique, vous devez louer ou acheter un boîtier numérique spécial de votre câblodistributeur.

1. très probable
2. assez probable
3. peu probable
4. OU pas du tout probable
5. Peut-être ou peut-être pas
6. Dépend du prix/service

7. Mon câblodistributeur n'offre pas le câble numérique
8. J'ai déjà un boîtier ou un ENP (récepteur vidéo personnel) fourni par mon câblodistributeur
9. NSP/Refus

### **LA TÉLÉVISION HAUTE DÉFINITION**

Il s'agit d'un nouveau mode de réception des émissions de télévision qui offre des images et un son d'une qualité nettement supérieure à ce que vous obtenez avec la télévision standard et même la télévision numérique. Pour recevoir la télévision Haute Définition ou TVHD, vous devez avant tout acheter un téléviseur Haute Définition. Est-ce que vous possédez déjà, dans votre foyer, un téléviseur Haute Définition?

1. Oui
2. Non
3. NSP/Refus

Avez-vous présentement, dans votre foyer, un terminal HD?

1. Oui
2. Non
3. NSP/Refus

Quelles sont les probabilités pour que dans votre foyer on achète un téléviseur haute définition au cours des douze prochains mois? Diriez-vous...

1. très probable
2. assez probable
3. peu probable
4. OU pas du tout probable?
5. Peut-être ou peut-être pas
6. Dépend du prix/service/programmation
7. NSP/Refus

### **UN MAGNÉTOSCOPE OU UN LECTEUR DVD**

Possédez-vous dans votre foyer un des équipements médias suivants? LIRE NOTE INTERVIEWER : lire la phrase jusqu'au bout...lecteur/graveur de DVD relié à votre téléviseur

1. Un magnétoscope (VCR ou enregistreur de vidéocassettes)
2. Un lecteur de DVD relié à votre téléviseur (disque vidéo)
3. Aucun
4. NSP/Refus

## UN ENREGISTREUR NUMÉRIQUE (ENP)

Il existe un nouveau type d'enregistreur d'émissions de télévision appelé ENP ou RVP que vous pouvez acheter ou louer auprès de votre câblodistributeur. Avec cet appareil vous utilisez une simple télécommande pour: - enregistrer des émissions en pressant simplement sur un bouton-pour sauter des publicités - pour interrompre temporairement une émission que vous regardez et la reprendre là où vous l'avez laissée - et enfin pour stocker sur le disque dur plus de cinquante heures d'émissions sans utiliser de vidéocassettes. AU BESOIN DITES : un ENP est un enregistreur numérique personnel et un RVP est un récepteur vidéo personnel

Votre foyer est-il équipé d'un ENP ou RVP? LIRE AU BESOIN: Avec un ENP ou RVP, il est beaucoup plus facile d'enregistrer des émissions. Il suffit d'appuyer sur un simple bouton de la télécommande. Les émissions enregistrées sont mises en mémoire sur le disque dur de l'ENP ou RVP, ce qui élimine l'utilisation de vidéocassettes et de DVD à graver.

1. Oui
2. Non
3. A un ENP mais n'en a pas acheté ou loué d'un fournisseur de télévision de câble/satellite
4. NSP/Refus

Quelle est la probabilité qu'au cours de la prochaine année, on loue ou on achète dans votre foyer un ENP ou RVP? Diriez-vous que c'est ... LIRE AU BESOIN : Avec un ENP ou RVP, vous pouvez : - enregistrer des émissions en pressant simplement sur un bouton - sauter les publicités - interrompre temporairement l'émission que vous regardez et la reprendre là où vous l'avez laissée - enregistrer sur le disque dur de votre ENP (ou RVP) des émissions sans utiliser de vidéocassettes.

1. très probable
2. assez probable
3. peu probable
4. OU pas du tout probable?
5. Peut-être ou peut-être pas
6. Dépend du prix/service
7. NSP/Refus

**AUDIO****UN LECTEUR MP3**

Possédez-vous un lecteur MP3 de type i-Pod ou autre? LIRE AU BESOIN : Un lecteur MP3 est un appareil portatif qui permet de garder en mémoire et de faire jouer des fichiers audio comme de la musique téléchargée à partir d'Internet ou copiée de vos CD

1. Oui
2. Non
3. NSP/Refus

**INTERNET**

Avez-vous une connexion Internet à la maison?

1. Oui
2. Non
3. NSP/Refus

Est-ce qu'il s'agit d'une connexion haute vitesse ou d'une connexion ordinaire via un modem de base qui utilise la ligne téléphonique? Est-ce... AU BESOIN DITES : un modem à composition automatique fonctionne à une vitesse plus lente (14,4K; 28,8K; 33,3K ou 56,6K par seconde). Une connexion haute vitesse est beaucoup plus rapide et est fournie par une entreprise de câblodistribution ou de téléphone, au moyen d'un modem câble, d'un modem câble sans fil, d'un modem DSL ou d'un service direct d'ordinateur personnel

**N'ACCEPTÉZ QU'UNE SEULE RÉPONSE - SI LE RÉPONDANT A PLUS D'UNE CONNEXION, DEMANDEZ-LUI CELLE QU'IL UTILISE LE PLUS SOUVENT**

1. une connexion Haute Vitesse
2. une connexion ordinaire via un modem de base qui utilise la ligne téléphonique
3. Un autre type de connexion (précisez) : \_\_\_\_\_
4. Ne sait pas s'il s'agit d'une connexion ordinaire ou haute vitesse
5. NSP/Refus

## **HABITUDES D'UTILISATION D'INTERNET**

Nous aimerions maintenant mieux connaître vos habitudes d'utilisation d'Internet. Au cours du dernier mois, avez-vous personnellement effectué chacune des activités suivantes : Télécharger ou sauvegarder sur le disque dur de votre ordinateur de la musique disponible sur Internet ?

1. Oui
2. Non
3. NSP/Refus

À quelle fréquence avez-vous personnellement téléchargé ou sauvegardé sur le disque dur de votre ordinateur de la musique disponible sur Internet. Est-ce...

1. tous les jours ou presque
2. au moins une fois par semaine
3. au moins une fois par mois
4. moins d'une fois par mois
5. OU jamais ?
6. NSP/Refus

Nous aimerions maintenant mieux connaître vos habitudes d'utilisation d'Internet. Au cours du dernier mois, avez-vous personnellement effectué chacune des activités suivantes : Télécharger ou sauvegarder sur le disque dur de votre ordinateur des fichiers vidéo tel que des films, des émissions de télévision ou des bulletins de nouvelles disponibles sur Internet ?

1. Oui
2. Non
3. NSP/Refus

À quelle fréquence avez-vous personnellement téléchargé ou sauvegardé sur le disque dur de votre ordinateur des fichiers vidéo tel que des films, des émissions de télévision ou des bulletins de nouvelles disponibles sur Internet. Est-ce...

1. tous les jours ou presque
2. au moins une fois par semaine
3. au moins une fois par mois
4. moins d'une fois par mois
5. OU jamais ?
6. NSP/Refus

**CBC / Radio-Canada**  
**Media Technology Monitor 2005**  
**Questions – English Markets**

**VIDEO**

**TV RECEPTION METHOD**

Does your household have cable TV, satellite TV or some other type of television service?  
**IF MORE THAN ONE TYPE OF TV SERVICE ASK WHICH ONE THEY CONSIDER TO BE THEIR PRIMARY SERVICE.**

1. Cable TV
2. Satellite Television
3. Wireless Cable
4. Telco TV (television service over the phone line)  
 (ON and QC: “ExpressVu service for condos”)  
 (Manitoba: “MTS TV”)  
 (Saskatchewan: “Max Interactive Services”)  
 (Alberta: “Telus TV”)
5. Have an antenna (receive free TV stations broadcast over-the-air that you receive through a roof-top antenna, rabbit ears or an antenna built into your TV set)
6. Other SPECIFY \_\_\_\_\_
7. No (receive free TV stations broadcast over-the-air that you receive through a roof-top antenna, rabbit ears or an antenna built into your TV set)
8. Do not have a working TV set
9. Don’t know

**IF DON’T KNOW**

I will read you some definitions to help you respond to this question.

**DEFINITION OF CABLE TV:**

If you have Cable Television, you or your landlord pay a monthly subscription fee to a cable company such as Rogers or Shaw to receive additional television stations.

**DEFINITION OF SATELLITE TV:**

With Satellite TV, you or your landlord pay a monthly subscription fee to a satellite television company such as ExpressVu or StarChoice to receive additional channels. In order to receive satellite television, you must have a satellite dish installed outside your home and rent or buy a special set-top receiver.

**DEFINITION OF FREE TV STATIONS RECEIVED VIA AN ANTENNA:**

If you receive free conventional TV stations you must have a roof-top antenna, an antenna that is attached to your TV set which is also know as rabbit ears, or an antenna built into your TV set. You do not pay a monthly subscription fee.

**DIGITAL VS ANALOG CABLE****ASK IF CABLE TV SUBSCRIBER**

And do you have regular cable or digital cable?

[IF NECESSARY READ: In order to receive digital cable, you need to rent or buy a special digital set-top box from your cable company. Digital cable provides improved picture and sound quality, a greater choice of channels, commercial-free music channels, and an interactive onscreen program guide] [NOTE TO INTERVIEWER: IF RESPONDENT INDICATES THAT THEY HAVE A PVR (PERSONAL VIDEO RECORDER) OR DVR (DIGITAL VIDEO RECORDER), CODE AS DIGITAL CABLE]

1. Regular Cable (Analogue Cable)
2. Digital Cable
3. Don't Know/Refused

**OVER-THE-AIR – SUBSCRIBES TO TV SERVICE****ASK OVER-THE-AIR VIEWERS**

As you may know, there are several types of television services to which you can subscribe that will give you access to additional channels and better reception, such as cable and satellite TV. How likely is your household to subscribe to cable TV, satellite TV or some other type of television service in the next 12 months? Would you say you ....

1. Definitely will
2. Probably will
3. Probably will not
4. Definitely will not
5. Might or might not
6. Depends on price/service
7. I already have cable, satellite or some other type of TV service (GO BACK TO AND RE-CODE)
8. Don't know/Refused

## **VIDEO-ON-DEMAND**

### **ASK IF RESPONDENT SUBSCRIBES TO DIGITAL CABLE AND RECEIVES SERVICE FROM ROGERS, SHAW, VIDEOTRON OR COGECO CABLE.**

With your television service you may also have Video-on-Demand or VOD, in which you pay a fee to order movies or other types of programs from a list shown on your TV screen. You can access a Video-on-Demand program at any time and watch it as many times as you want over a 24-hour period. In the past month, have you watched a movie or program offered on VOD?

[IF NECESSARY SAY: "Video-on-Demand is similar to renting a movie at the video store. You pay a fee for each movie. Once you start a VOD movie you can pause, rewind or fast forward it and play it as often as you want over a 24-hour period. The only difference is that with Video on Demand you order the movie right off your TV screen through your cable company."]

1. Yes
2. No
3. Do not know of this service
4. Don't receive this service
5. Don't know / Refused

How frequently do you typically watch a movie or program offered on Video-On-Demand?  
Is it...

1. Several times a week
2. At least once a week
3. At least once a month
4. or, less than once a month
5. Don't Know/Refused

## **ANALOG INTENTION TO SUBSCRIBE TO DIGITAL CABLE**

[ASK ANALOGUE CABLE SUBSCRIBERS]

Earlier you told me that you have regular cable. It may be possible for you to receive digital cable that provides improved picture and sound quality, and many new specialty channels. How likely is your household to subscribe to digital cable in the next 12 months? Would you say you ... [IF NECESSARY READ: In order to receive digital cable you have to rent or buy a special digital set-top box from your cable company]

1. Definitely will
2. Probably will
3. Probably will not
4. Definitely will not

5. Might or might not subscribe
6. Depends on price/service
7. Digital cable not offered by my cable company
8. Already have set-top box or PVR (personal video recorder) from my cable company that allows me to get digital cable– GO BACK AND CODE AS DIGITAL CABLE SUBSCRIBER AND CONSIDER AS SUCH IN FUTURE SKIPS]
9. Don't know

## **HDTV**

Now I'd like to ask you some questions about high-definition television, also known as HDTV.

HDTV is a new way of receiving television programming which provides superior picture and sound quality to what you get from regular or even digital television. Does your household currently have a high-definition television set?

1. Yes
2. No
3. Don't know /Refused

[READ IF HAS HDTV SET AND DIGITAL TV

In order to receive high-definition television programming you must also buy or rent a special 'HD set-top box'. This is not your standard 'digital set-top box that comes with your television service, but rather a special 'HD set-top box' for which you pay a higher fee.

[READ IF HAS HDTV SET AND ANALOGUE CABLE SUBSCRIBER]

In order to receive high-definition television programming you must also buy or rent a special 'HD set-top box'.

Does your household currently have a 'HD set-top box'?

1. Yes
2. No
3. Don't know /Refused

[ASK IF DOES NOT HAVE HDTV SET]

How likely is your household to buy a high-definition television set within the next 12 months? Would you say you... **(Read List)**

1. Definitely will
2. Probably will
3. Probably will not
4. Definitely will not
5. Might or might not
6. Depends on price/service/programming
7. Don't know/ Refused

### **VCR/DVD PLAYER**

Does your household have any of the following media equipment?

- A VCR (videocassette recorder)
- A DVD player connected to your TV set
- None
- Don't know/Refused

### **PVR**

ASK IF DIGITAL CABLE OR SATELLITE

There is a new kind of television recorder called a PVR or Personal Video Recorder that you can buy or rent from your cable company. With a PVR you use a simple remote control – to record TV programs with the push of a single button – to skip over commercials – to pause a program you are watching – and, to store more than 50 hours of recorded programs on a hard drive without using videocassettes.

[IF NECESSARY SAY: A PVR is also known as a DVR or Digital Video Recorder]

Does your household have a PVR or Personal Video Recorder?

[IF NECESSARY SAY: With a PVR it is much easier to record TV programs, you simply push a single button on the remote control. Recorded TV programs are stored on a hard drive right in the PVR unit so you never need to use videocassettes or recordable DVDs]

- Yes
- No
- Have a PVR but did not buy or rent it from a cable/satellite company
- Don't know/Refused

[ASK IF DOES NOT OWN A PVR]

How likely is your household to buy or rent a PVR in the next 12 months... Would you say you.... **(Read List)** [IF NECESSARY SAY: With a PVR you can – easily record TV programs with the push of a single button - skip over commercials - pause or temporarily interrupt a program you are watching and – record programs on a hard drive built into the PVR so you do not need videocassettes].

1. Definitely will
2. Probably will
3. Probably will not
4. Definitely will not
5. Might or might not
6. Depends on price/service
7. Don't know/ Refused

## **AUDIO**

### **MP3 PLAYERS**

Do you personally have a portable MP3 Player such as an i-Pod?

[IF NECESSARY SAY: An MP3 Player is a portable device that stores and plays audio files such as music downloaded off the Internet or music copied from your CDs]

[IF NECESSARY SAY: Types of MP3 Players include i-Pod, Rio, i-River and Creative]

1. Yes
2. No
3. Don't know

## **INTERNET**

Does your household have an Internet connection at home?

1. Yes
2. No
3. Don't Know/Refused

Is this a high speed connection or a dial-up connection which uses a telephone line?

[If NECESSARY SAY: A dial-up connection uses an ordinary telephone line and operates at a slower speed (14.4K; 28.8K; 33.3K or 56.6K per second). A high-speed connection is much faster and is provided by a cable or phone company via a cable modem, a wireless cable modem, a DSL modem or a direct PC service]

ACCEPT ONE RESPONSE – IF THE RESPONDENT HAS MORE THAN ONE TYPE OF CONNECTION, ASK: which one do you use most often?

1. High-speed connection
2. Dial-up connection which uses an ordinary phone line
3. Some other type of connection (specify) \_\_\_\_\_
4. Don't know if high speed or dial up
5. Don't know/Refused

### **ONLINE ACTIVITIES**

[ASK IF ACCESSED INTERNET IN PAST MONTH]

We would like to know more about what you do on the Internet. In the past month, have you personally done any of the following activities?

**IF NECESSARY SAY: It doesn't matter if it's personal or professional use and where you are when you access the Internet.**

- Download music available over the Internet
  - Download video such as a movie, TV program or newscast available over the Internet
1. Yes
  2. No
  3. Don't Know/Refused

And, how frequently do you personally: (INSERT if DOWNLOAD MUSIC/DOWNLOAD VIDEO)? (Is it...?)

1. Every or almost every day
2. At least once a week
3. At least once a month
4. Less than once a month
5. OR never
6. Don't know/Refused