Public Survey Results

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EXECUTIVE SUMMARY

In May 2006, Premier Lorne Calvert appointed Regina Rosemont MLA Joanne Crofford to lead the Music Industry Review (MIR). The purpose of the review was to determine how government could assist the industry in supporting opportunities and nurturing music talent at every level. Phase I of the MIR included a literature review and extensive community consultations with key Saskatchewan musicians, music industry professionals and organizations. In Phase II of the MIR, community consultations continued. As well, two on-line surveys were developed by Saskatchewan Culture, Youth and Recreation (CYR) to collect information from both Saskatchewan residents and Saskatchewan music industry professionals.

This Music Industry Review Public Survey Report was used to provide information to the Legislative Secretary, Joanne Crofford to use in shaping the final MIR recommendations.

The purpose of the public survey was to collect information from Saskatchewan residents regarding the public's level of involvement/engagement in live and recorded music, the benefits and barriers of attending live music performances, information sources they use to find out about new and live music, use of Internet and digital resources, and awareness of Saskatchewan music.

An online questionnaire was developed based on information from the literature review and the consultations in Phase I of the MIR. Two approaches were used to administer this online survey. An email invitation was sent directly to a random sample of Saskatchewan residents. A second approach utilized a link on CYR's website for the public to have access to the survey. Combining both sets of respondents resulted in a total of 1,232 respondents.

The findings highlight the appreciation Saskatchewan residents have for Saskatchewan talent and the impact of the music industry on the Province's economy. There is also evidence that there is a need to support artists in marketing Saskatchewan music.

The top three music genres that respondents listened to were: (1) Rock; (2) Current hits or pop; and (3) Country. Radio (AM/FM) was both the most common method of listening to music and the most frequently used source to find out about new music. Half of the respondents participated in music-related activities in 2006. A large majority of respondents valued the music talent in the province. Also, the majority of respondents agreed or strongly agreed that the music industry is important to the Saskatchewan economy.

Respondents owned an average of 218 pre-recorded music CDs, mini discs, vinyl records, cassettes and/or DVDs. The majority of respondents' inventory consisted of CDs or mini discs. Over half of the respondents converted pre-recorded commercially produced music to digital files. The majority of respondents purchased six or more pre-recorded CDs, Cassettes, Vinyl records or DVDs in 2006. Respondents typically purchased their pre-recorded music at big box stores and traditional music stores.

A large majority of respondents used the Internet for music-related purposes. Over half of the respondents downloaded music in 2006. A large majority of respondents purchased digital music in 2006. Respondents downloaded on average the equivalent of 119 individual songs in 2006. The two most common sources used by respondents to download music were: (1) Digital or online store; and (2) Peer-to-peer file sharing.

A large percentage of respondents attended at least one live music performance (LMP) in 2006. Over ninety percent of the LMPs attended by respondents were in Saskatchewan (68.5% in their local community). The three most frequently cited venues where respondents attended LMPs were: (1) Stadium; (2) Concert hall; and (3) Park or other open-air facility. One third of respondents planned to attend at least one of the four major music events being held in Saskatchewan in 2007.

The results indicate that the majority of respondents valued LMPs and felt that the quality of LMPs in Saskatchewan was excellent. The top three benefits of attending LMPs were: (1) It is fun; (2) It makes me feel good; and (3) Spending time with family and friends. The top three barriers that prevented respondents from attending more LMPs were: (1) Cost of tickets is too high; (2) Family and child care obligations; and (3) Not enough time to attend LMPs.

Almost all of the respondents listened to music by Saskatchewan artists. Of those respondents who purchased pre-recorded music in 2006, the majority purchased music by Saskatchewan artists. Of those who downloaded music in 2006, the majority downloaded music by Saskatchewan artists. A large majority of respondents attended LMPs by Saskatchewan artists (of those who attended a LMP in 2006).

To better understand music purchasing behavior of respondents comparisons were made based on six music consumption groups. These groups were created using responses to three variables: (1) Pre-recorded purchases; (2) Live music performance attendance and (3) Digital music purchases.

The results indicated that the high digital consumption groups were younger, more mobile, more likely to be single, and more likely to have a child living in their household. Moreover, high live music consumption groups tended to be more educated and live in communities over 50,000 people.

Respondents in the high music consumption groups had a significantly larger inventory of pre-recorded music. They were also much more likely to purchase their pre-recorded music at locations other than traditional music or big box stores. Overall, the findings suggest respondents in the high music consumption groups were more likely to participate in music-related activities.

The perception that tickets to LMPs are too expensive was a major barrier that prevented respondents from attending LMPs more often. The comparisons also revealed that live music attendance was directly related to the degree to which respondents' received the benefits they were seeking while attending LMPs. Two key benefits that respondents were seeking were to: (1) Support local artists; and (2) Spend time with people who enjoy the same things I do. This finding demonstrates the importance of live music venues managing their brand identity among their core groups of patrons.

In summary, this report provides information to better understand the needs of Saskatchewan music consumers. In addition to informing the Music Industry Report recommendations, the findings from this study along with the music industry professional survey, will be shared with music industry associations/organizations and other stakeholders to assist them in meeting the needs of Saskatchewan residents. Culture, Youth and Recreation is deeply indebted to the assistance provided by Honourable Joanne Crofford (Legislative Secretary for the Music Industry Review), music industry organizations, and the many Saskatchewan residents who participated in the study.

SECTION 1: INTRODUCTION & BACKGROUND

Music Industry Review

In May 2006, Premier Lorne Calvert appointed Regina Rosemont MLA Joanne Crofford to lead the Music Industry Review (MIR). The purpose of the review was to determine how government could assist the industry in supporting opportunities and nurturing music talent at every level.

Phase I of the MIR included a literature review, preliminary consultations with key Saskatchewan cultural organizations (SaskMusic, SaskCulture, and Saskatchewan Arts Board) and consultations with music industry leaders. Consultations were held with reference groups comprised of Saskatchewan-based music industry leaders, musicians, songwriters, publishers, managers/agents, producers, labels, studios, publicists, venues, broadcasters, median provincial organizations and other stakeholders. A total of 98 representatives participated in 11 small group and individual interviews conducted in four cities in October and November 2006. In January 2007, Ms. Crofford released the Saskatchewan Music Industry Review Interim Report. This report contains short-term recommendations for 2007, and sets forth plans for Phase II of the review. The final recommendations will be released in summer 2007.

In Phase II of the MIR, two on-line surveys were developed by Saskatchewan Culture, Youth and Recreation to collect information from both Saskatchewan residents and Saskatchewan music industry professionals.

This report presents the results of the survey of Saskatchewan residents.

SECTION 2: METHODOLOGY

The purpose of the public survey was to collect information from Saskatchewan residents regarding the public's level of involvement/engagement in live and recorded music, the benefits and barriers of attending live music performances, information sources they use to find out about new and live music, use of Internet and digital resources, and awareness of Saskatchewan music.

An online questionnaire was developed based on information from the literature review and the consultations in Phase I of the MIR. The online version was only available in English. The website did provide individuals with an option to request a mail back paper questionnaire in French. However, no one requested a French Version.

There were two approaches taken to recruit Saskatchewan residents to participate in the online survey: (1) Direct-email invitation; and (2) Website (open/public access). To further recruit respondents and encourage participation in the online survey, all respondents were entered into a draw for two tickets to the Juno Awards in Saskatoon.

A Saskatchewan-based consultant firm, Itracks, was hired to conduct a random digit dial phone campaign to obtain 1,200 names and email addresses from Saskatchewan residents 15 years and older who agreed to participate in the online music survey. Phone calls were made from February 20th to February 26th, 2007. The consultant firm provided a total of 1,074 (89.5%) useable email addresses. The Evaluation Unit in CYR sent these individuals an email invitation with an embedded link to the online survey. Two reminder emails were sent to non-respondents at one week intervals from the initial email invitation. A total of 720 individuals in the direct email invitation sample completed the online questionnaire resulting in a high response rate (66.1%; 720/1074).

The link to the online music survey on CYR's website was open to the public from February 22nd to March 22nd, 2007. A total of 512 individuals completed the online music survey via the link on CYR's website. A review of responses did not find any duplicate or multiple responses.

Combining both sets of respondents resulted in a total of 1,232 individuals that completed the online music survey. On average, the online survey took respondents 12 minutes to complete.

The online survey that was posted on CYR's website was promoted through a variety of mediums. Paid advertisements were placed in campus newspapers (SIAST, University of Saskatchewan and University of Regina), Prairie Dog and Planet S. In addition, the music survey website was also promoted using public service announcements, news releases and interviews with Hon. Joanne Crofford. The large number of respondents and results suggest that efforts to promote the online music survey website were successful.

Respondents were asked to identify all of the sources they used to find out about the online music survey. Over one third of respondents (35.7%) found out about the survey through the Internet.

Table 2.1: Information Sources Used by Website Respondents to Find Out About the Online Music Survey

Information Sources	Percent of Website Respondents
Internet	35.7%
Other Newspaper/Magazine	23.4%
Friends or Family	10.5%
Newsletter/Brochure	9.4%
Music-Related Professional Organization	8.2%
Government Official/Staff	7.6%
Community/Campus Paper	7.6%
Radio	6.6%
Other	4.1%
TV	3.7%

SECTION 3: RESPONDENT DEMOGRAPHICS

Gender

The majority of respondents (66.0%) were female.

Age

The average age of respondents was 38 years (range: 11 to 84 years). The majority of respondents (53.8%) were under 40 years of age.

Diversity

There was a reasonable level of diversity based on respondents self-report on their membership in three equity groups.

- First Nations or Métis: 8.5%
- Racial Background
  - Caucasian: 90.7%
  - Non-Caucasian: 9.3%
- Persons with a Disability: 8.3%

Language

Respondents were asked to indicate the languages that they could speak well enough to conduct a conversation. The majority of respondents (89.3%) were able to conduct a conversation only in English. Ten percent of respondents (10.3%) were fluent in both English and French. Nine percent of respondents (8.6%) spoke a language other than English and French.

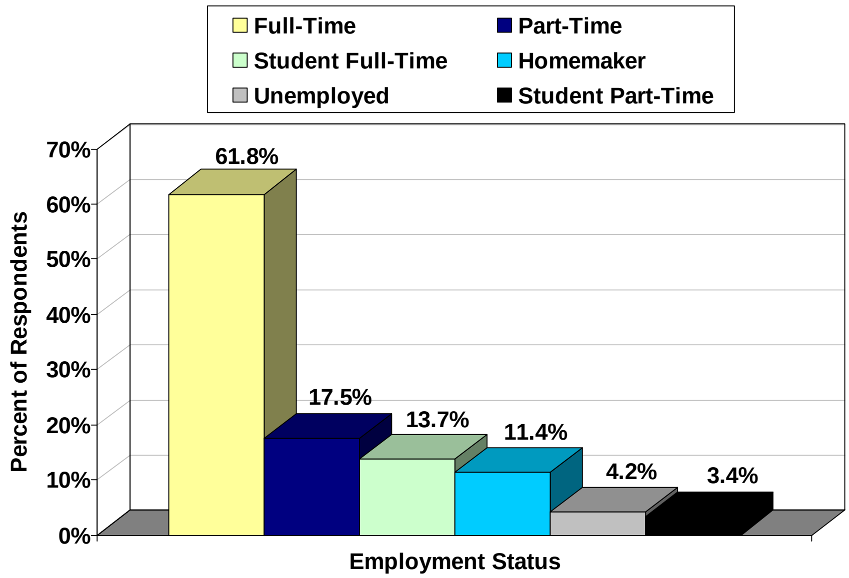
Highest Level of Education

A large majority of respondents (77.1%) had obtained an education beyond the high school level. A third of respondents (32.9%) had obtained university bachelors or graduate degrees.

Employment Status

Respondents were asked to indicate their current employment status. Respondents were allowed to respond to all the categories that applied. The majority of respondents (61.8%) reported that they were employed full-time.

Figure 3.1: Employment Status of Respondents



Marital Status

The majority of respondents (61.2%) were married (51.8%) or living common law (9.4%).

Household Size

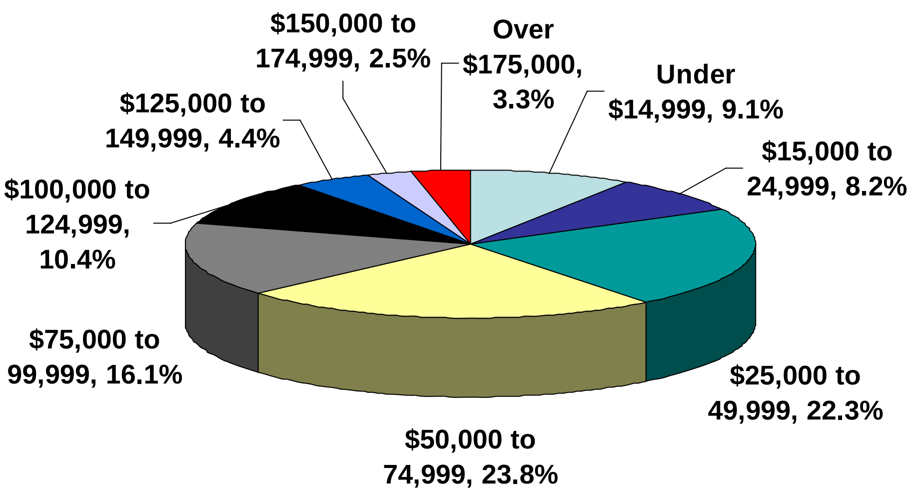
The majority of respondents (54.2%) did not have any children (17 years or younger) living in their household.

The majority of respondents (79.3%) had at least two adults (18 years or better) living in their household.

Household Income

The majority of respondents (60.4%) indicated that their annual household income in 2006 was at least $50,000.

Figure 3.2: Percent of Respondents by Household Income



Community Size

Half of the respondents (50.1%) lived in a community larger than 50,000 people. Twenty-five percent of respondents (25.2%) lived in rural communities of 2,000 people or less.

Place of Birth

The majority of respondents (78.8%) were born in Saskatchewan. Only 3.3% of respondents were born outside of Canada.

Residence Status

Respondents were asked how long they had lived in their current home, community and in Saskatchewan. The results indicate very little mobility or change in residence status among respondents.

- The average (median) length of time respondents lived in:
  - Present home: 6 years (range: 0 to 64 years).
  - Current city or town: 17 years (range: 0 to 68 years).
  - Saskatchewan: 30 years (range: 0 to 84 years).

SECTION 4: MUSIC LISTENING

Music Genres

Respondents were asked to indicate how often they listened to fourteen selected music genres on a seven point scale from never to more than once a day. These responses were divided into two groups, those who listened to each music genre at least once per week and those that listened less often. The three most frequently listened to music genres were: (1) Rock (79.4%); (2) Current hits or pop (73.1%); and (3) Country (48.9%).

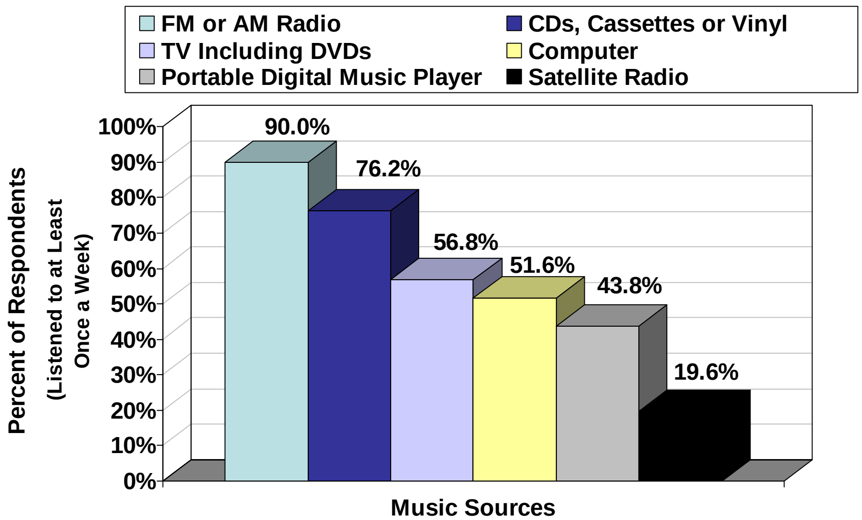
Table 4.1: Music Genres Listen to by Respondents in 2006

Genre	Percent of Respondents (Listened to at Least Once a Week)
Rock	79.4%
Current Hits or Pop	73.1%
Country	48.9%
Alternative	44.3%
R&B	30.7%
Hip-Hop	29.1%
Dance	27.3%
Jazz or Blues	27.0%
Roots, Folk or World	19.7%
Classical or Opera	19.2%
Children’s Music	16.9%
Gospel or Christian	16.1%
Electronica	13.3%
Other	8.9%

Music Source Listened to in Past Year At Least Once a Week

Respondents were asked to indicate how often they listened to six selected music sources on a seven point scale from never to more than once a day. The three most frequently listened to music sources were: (1) Radio (AM/FM) (90.0%); (2) CDs, cassettes or vinyl (76.2%); and (3) TV, including DVDs (56.8%).

Figure 4.1: Music Sources Listened to by Respondents in 2006



Language of Music

Respondents were asked to indicate the languages in which they listened to music. Almost all of the respondents (99.7%) listened to music in English. Twenty-one percent of respondents (21.0%) listened to music in languages other than English.

- English: 99.7%
- Other than English: 21.0%
  - French: 11.6%
  - Other: 11.4%
  - Aboriginal: 3.9%

Music-Related Activities

Respondents were asked how often they participated in eight music-related activities. Overall, 60.4% of respondents participated in at least one of the eight music-related activities in 2006. The three activities with the highest level of participation were: (1) Played a musical instrument (47.9%); (2) Volunteered at a music-related event or with a music-related organization (31.0%); and (3) Performed or assisted in a music production (22.8%).

Table 4.2: Participation in Eight Selected Music-Related Activities in 2006

	Percent of Respondents (At least once)
Play a musical instrument	47.9%
Volunteer at a music-related event or organization	31.0%
Perform or assist in a music production	22.8%
Participate in a music-related review	21.4%
Sing in a choir or singing group	20.6%
Take a music lesson or class	19.7%
Perform or play with a music group or band	18.9%
Participate in any music-related fan clubs	14.7%

Information Sources Used to Find New Music

The three information sources that were most frequently cited by respondents to find out about new music were: (1) Radio (FM/AM/Satellite) (91.7%); (2) Friends or family (86.5%); and (3) TV (82.1%).

Table 4.3: Information Sources Used by Respondents to Find Out About New Music

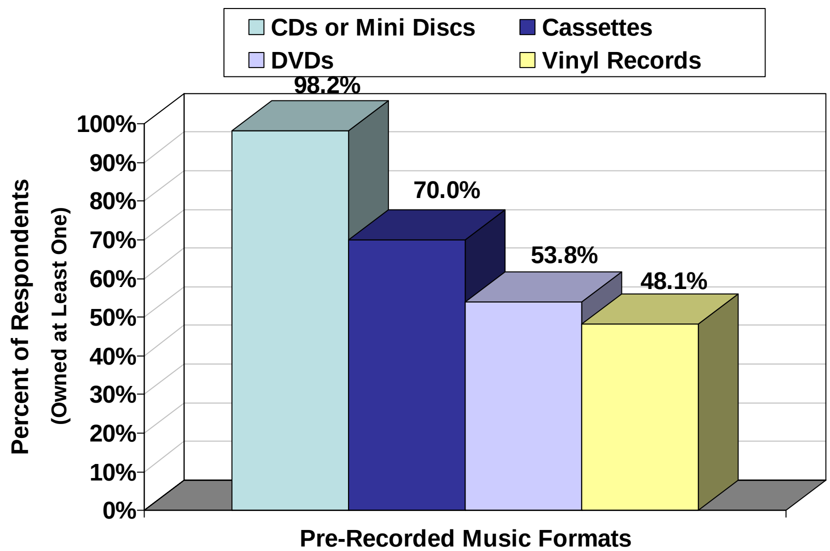
Information Sources	**Percent of Respondents**
Radio (FM/AM/Satellite)	91.7%
Friends or family	86.5%
Television	82.1%
Live music performance or concert	66.2%
Print (newspapers or magazines)	60.2%
Websites or blogs that review music	39.3%
Myspace.com or similar site	21.9%
Music discussion forums	10.8%
Other	4.3%

SECTION 5: PRE-RECORDED MUSIC INVENTORY AND PURCHASE BEHAVIOR

Inventory of Pre-Recorded Music

Almost all of the respondents (98.2%) owned at least one CD or mini disc.

Figure 5.1: Pre-Recorded Music Owned by Respondents



Respondents owned an average of 218 pre-recorded music CDs, mini discs, vinyl records, cassettes and/or DVDs. The majority of the respondents' pre-recorded music inventory consisted of CDs or mini discs.

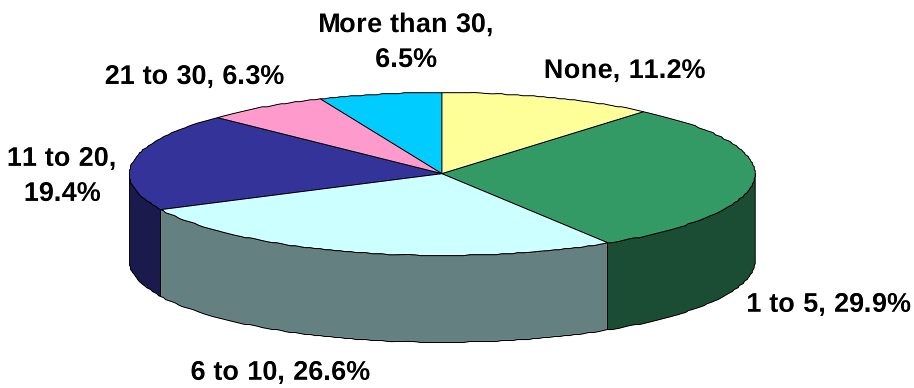
Table 5.1: Amount of Pre-Recorded Music Owned by Respondents

Type of Pre-Recorded Music	Mean	Median	Minimum	Maximum
CDs or mini discs	130.0	100	0	2000
Cassettes	39.2	15	0	1200
Vinyl records	42.7	1	0	1000
DVDs	6.7	1	0	100
Total	217.8	140	0	2200

Purchased Pre-Recorded Music

In 2006, eighty-nine percent of respondents (88.8%) purchased pre-recorded, commercially produced music for themselves or others. The majority of respondents (58.9%) purchased six or more pre-recorded CDs, cassettes, vinyl records, or DVDs in 2006.

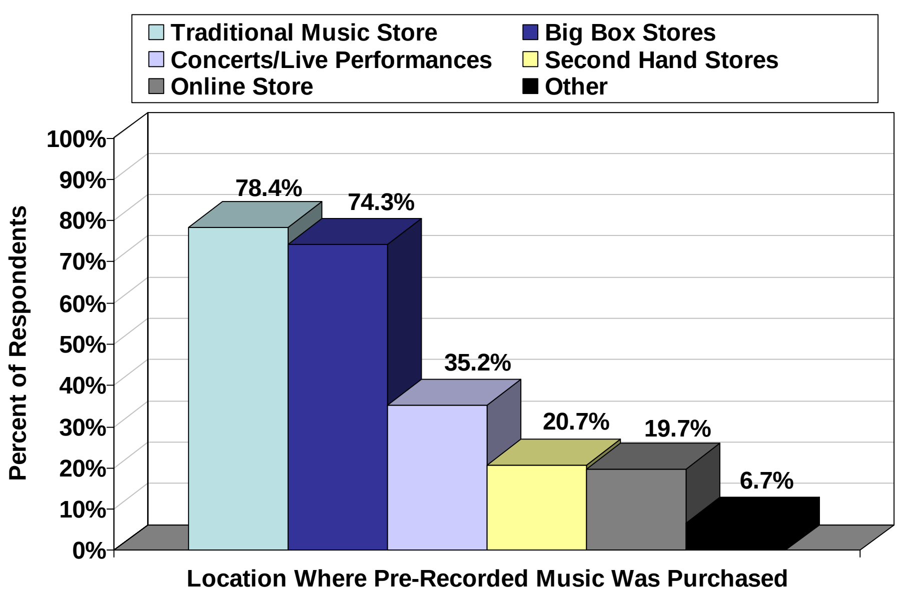
Figure 5.2: Number of Pre-Recorded Music Purchased by Respondents in 2006
(Excluding Digital)



Location Where Pre-Recorded Music was Purchased

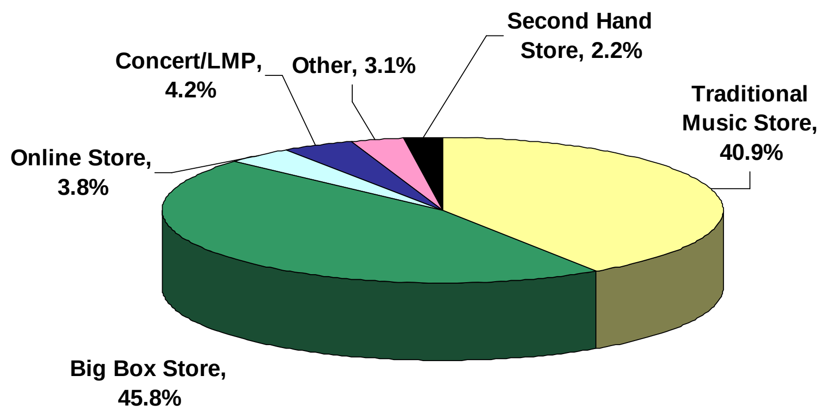
The majority of respondents purchased their pre-recorded commercially produced music at traditional music stores (78.4%) or big box stores (74.3%).

Figure 5.3: Location Where Respondents Purchased Pre-Recorded Music in 2006



Ninety-seven percent of respondents (96.7%) typically purchased pre-recorded commercially produced music at traditional music stores (40.9%) and big box stores (45.8%).

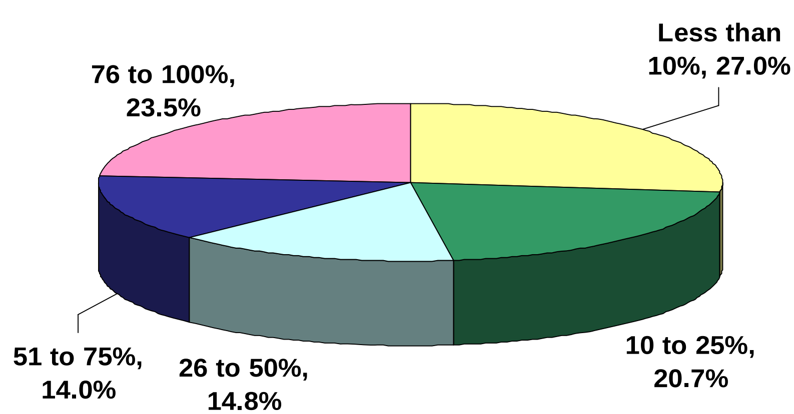
Figure 5.4: Location Where Respondents Typically Purchased Pre-Recorded Music in 2006



Converted Pre-Recorded Music to Digital Files

Over half of respondents (51.9%) had converted pre-recorded commercially produced music that they owned to digital files. Of those that converted any of their pre-recorded music to digital files, thirty-eight percent of respondents (37.5%) converted over 50 percent of their pre-recorded music to digital files.

Figure 5.5: Proportion of Pre-Recorded Music Owned by Respondents that had Been Converted to Digital Files

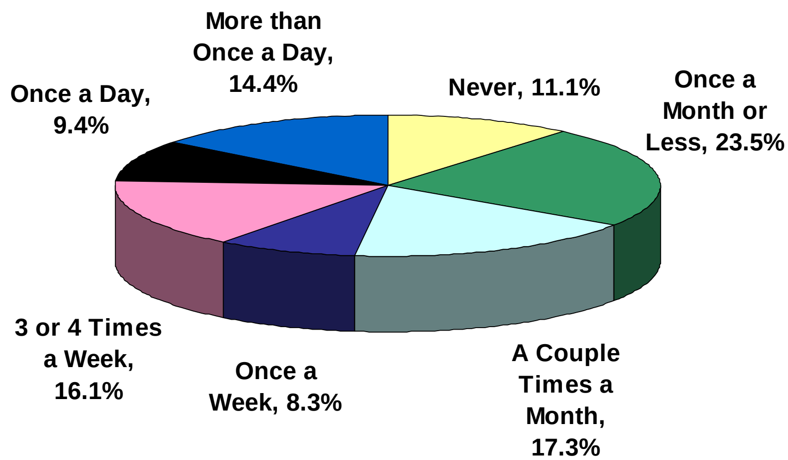


SECTION 6: INTERNET & DIGITAL MUSIC

Use of Internet for Music-Related Purposes

Ninety percent of respondents (89.9%) used the Internet for music-related purposes in 2006. Almost half of respondents (48.2%) used the Internet at least once a week for music-related purposes in 2006.

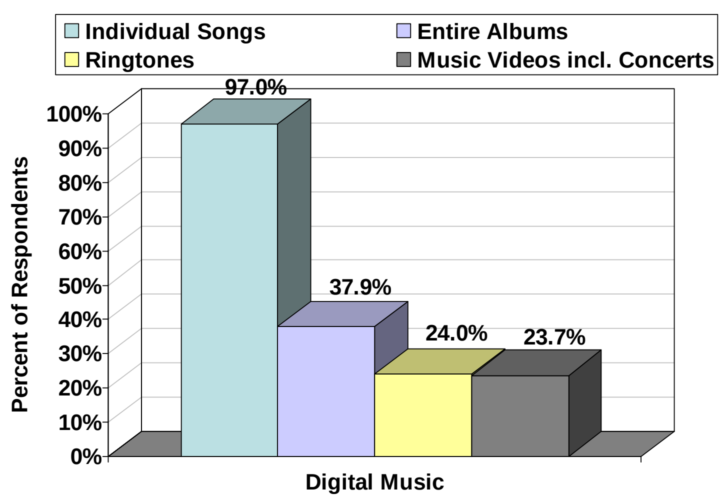
Figure 6.1: Percent of Respondents by Music-Related Internet Usage in 2006



Type of Digital Music Downloaded

The majority of respondents (59.9%) downloaded music in 2006. Of those who downloaded music in 2006, almost all of the respondents (97.0%) downloaded individual songs. A much smaller percentage of respondents downloaded entire albums, ringtones or music videos.

Figure 6.2: Type of Digital Music Downloaded by Respondents in 2006



Amount of Downloaded Music

Respondents who had downloaded digital music were asked to indicate how many downloads they made in 2006. Most of the music downloaded by respondents was in the form of individual songs. Respondents downloaded an average of 89 individual songs. Respondents downloaded an average of three digital albums (an equivalent of 30 additional songs; 10 per album).

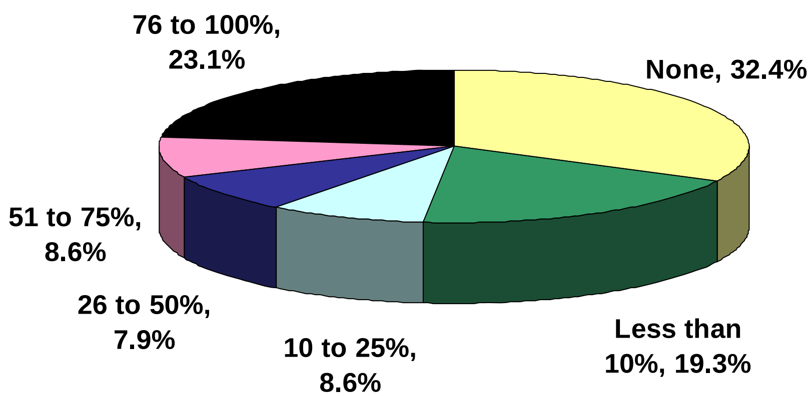
Table 6.1: Amount of Digital Music Downloaded by Respondents in 2006

Digital Music	Mean	Median	Minimum	Maximum
Individual Songs	89.0	10	0	2000
Entire Albums	2.9	0	0	200
Music Videos Including Concerts	2.0	0	0	200
Ringtones	1.5	0	0	100

Amount of Downloaded Music Purchased

The majority of respondents (67.6%) indicated that they purchased at least some of the digital music they downloaded in 2006. However, only twenty-three percent of respondents (23.1%) indicated that they purchased 76 to 100% of the music they downloaded.

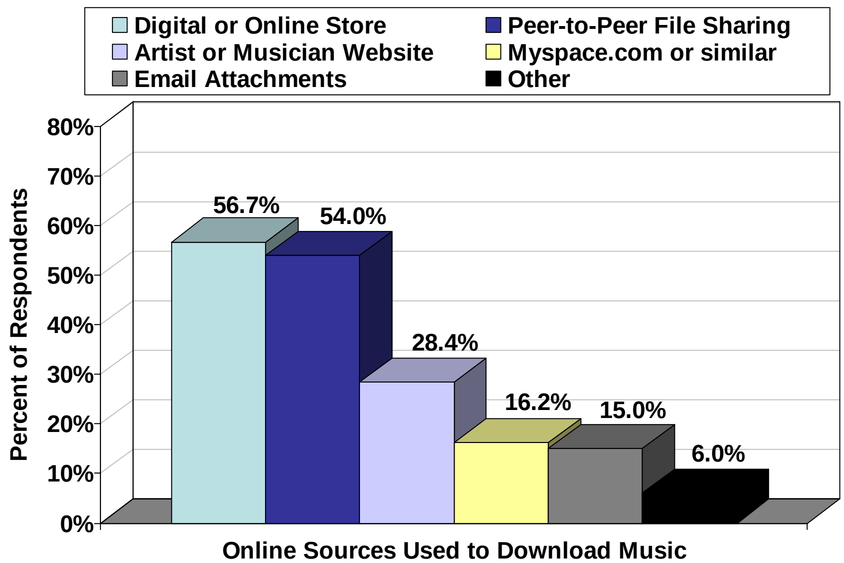
Figure 6.3: Percent of Downloaded Digital Music Purchased by Respondents in 2006



Source Used to Download Digital Music

The three most frequently cited sources for downloading digital music were: (1) Digital or online stores (56.7%); (2) Peer-to-peer file sharing site (54.0%); and (3) Artist or musician website (28.4%).

Figure 6.4: Online Sources Respondents Used to Download Digital Music



Views of Downloading Digital Music

Overall, the results suggest that the majority of respondents respect the need to support artists when downloading music. Also, the results indicate that the majority of respondents (64.4%) would download more music if the price was right.

Table 6.2: Respondents' Views of Downloading Digital Music

	Percent of Respondents
If I download free music files, I would support artists in other ways such as buying a CD or going to a live music performance	89.5%
I would download more music if the price was right	64.4%
I always pay for the music files I download, unless I know it is legal to download them for free	62.6%
I have downloaded a music file from a file-sharing network like Kazaa or Morpheus	45.2%
I have shared music files from my computer with my friends or family	41.5%
I think the high price of commercially produced music justifies downloading free digital music files from the Internet	29.5%

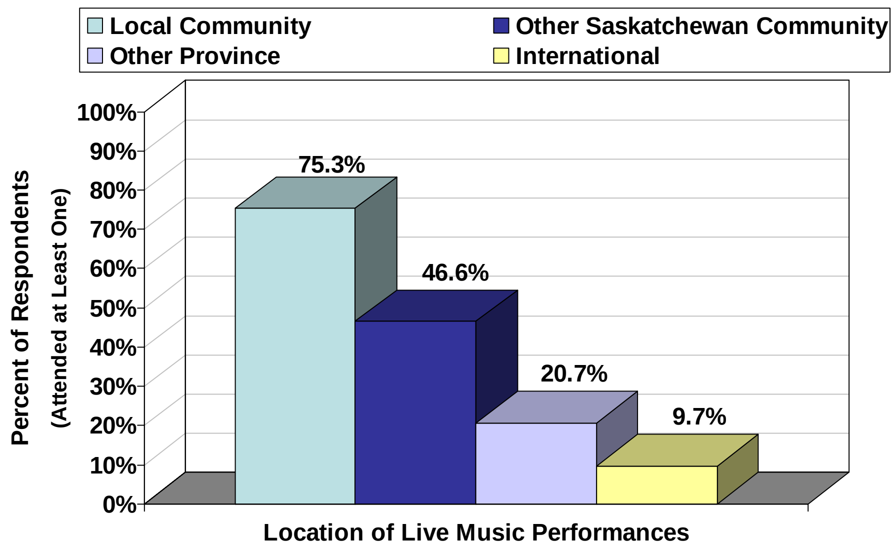
SECTION 7: LIVE MUSIC PERFORMANCES

Live Music Performance Attendance

A large majority of respondents (82.6%) attended at least one live music performance (LMP) in 2006. The remainder of results in this section are based on those respondents who attended at least one LMP in 2006.

Seventy-five percent of respondents (75.3%) attended a live music performance in their local community. Forty-seven percent of respondents (46.6%) attended a live music performance in another Saskatchewan community in 2006.

Figure 7.1: Location of Live Music Performances Attended by Respondents in 2006



Number of Live Music Performances

Overall, respondents attended an average of 11 performances in 2006. Ninety-two percent (92.1%) of the live music performances that respondents attended in 2006 were in Saskatchewan (68.5% in their local community). Respondents attended a live music performance in their local community an average of eight times in 2006.

Table 7.1: Number of Live Music Performances Attended by Respondents in 2006

Live Performances	Mean	Median	Minimum	Maximum
Local Community	7.6	3	0	150
Other Saskatchewan Community	1.9	1	0	40
Other Province or Territory	0.7	0	0	20
International	0.3	0	0	12
Total	10.5	5	0	180

Music Festivals and Special Events

Almost half of the respondents (45.1%) had attended a Music Festival or Powwow in Saskatchewan in the past two years.

Thirty-one percent of respondents (30.7%) planned to attend at least one of the four major music events being held in Saskatchewan in 2007. This result should be interpreted with caution since a pair of Juno tickets was offered as an incentive to participate in this study.

- Juno's: 22.3%
- Canadian Country Music Awards: 9.4%
- Western Canadian Music Awards: 5.4%
- Showcase of Aboriginal Music: 3.2%

Total Amount Spent on Attending Live Music Performances

- Respondents on average (median) spent $250 on live music performances in 2006 (range: $0 to $3000).
- Forty percent of respondents (39.9%) purchased concert-related merchandise (other than CDs, cassettes, vinyl records or DVDs) when they attended a live music performance.
- Respondents also attended on average (median) of one live music performance in 2006 where the tickets cost at least $50, (range: 0 to 40).

Live Music Performance Venues

Respondents were asked to identify, out of a list of 12, which venue types they attended in the past year. The three most frequently cited venues where respondents attended live music performances were: (1) Stadium or arena (60.5%); (2) Concert hall (50.6%); and (3) Park or other open-air facility (45.4%).

Table 7.2: Venues Where Respondents Attended Live Music Performances in 2006

Venue	Percent of Respondents
Stadium or Arena	60.5%
Concert Hall	50.6%
Park/Other Open-Air Facility	45.4%
Night Club	44.2%
Community Hall	41.3%
Restaurant/Pub/Lounge	37.2%
Elementary/High School Facility	26.5%
College/University Facility	25.8%
Coffee House	19.0%
Private Home	15.9%
Museum/Gallery/Library	7.6%
Other	5.5%

Saskatchewan hosted a number of high profile live music events in 2006 that were held in stadiums or arenas. Therefore, comparisons were made based on respondents' live music attendance and expenditures by whether (or not) they attended a performance in a stadium or arena.

The results indicate that respondents who attended a live music performance (LMP) in a stadium or arena had a significantly higher rate of attendance and expenditures than those who did not attend performances at a stadium or arena.

Table 7.3: Live Music Performance Attendance and Expenditures by Stadium or Arena Attendance

	Respondents who Attended a LMP in a Stadium or Arena in 2006	
	Yes	**No**
Number of Live Music Performances attended in 2006 (mean value reported)**…**		
in local community	8.3	7.6
in other communities in Saskatchewan	2.3	1.8
in other provinces/territories	0.9	0.5
outside Canada	0.6	0.3
Total	12.1	10.2
with ticket/admission fees of $50 or more	3.1	1.0
Live Music Performance Expenditures in 2006…		
Amount spent on LMPs	$433	$195

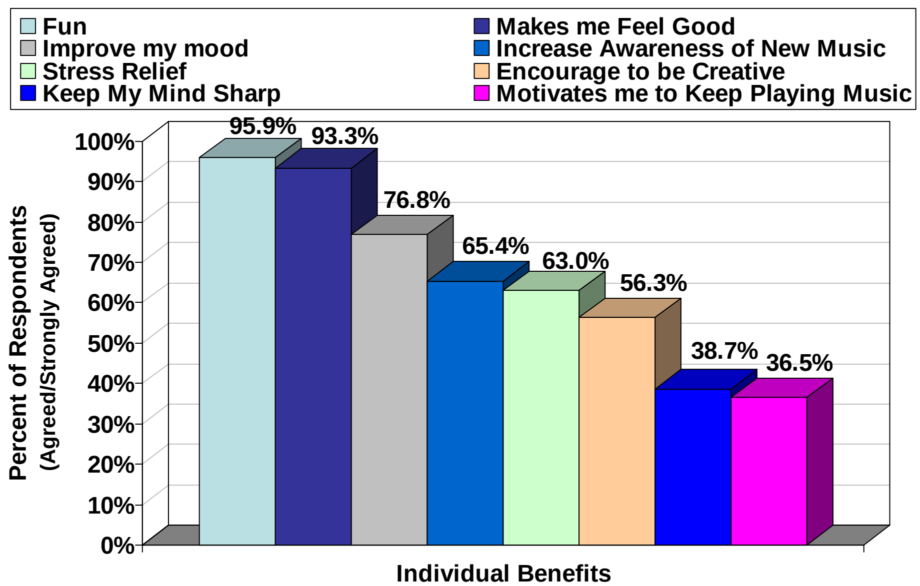
Benefits of Attending Live Music Performances

Respondents were asked to rate 15 benefits of attending a live music performance. These benefits were divided into two types: (1) Individual Benefits (8 items); and (2) Social and Community Benefits (7 items).

Individual Benefits

The three highest rated individual benefits of attending live music performances were: (1) It is fun (95.9%); (2) Makes me feel good (93.3%); and (3) Improves my mood (76.8%).

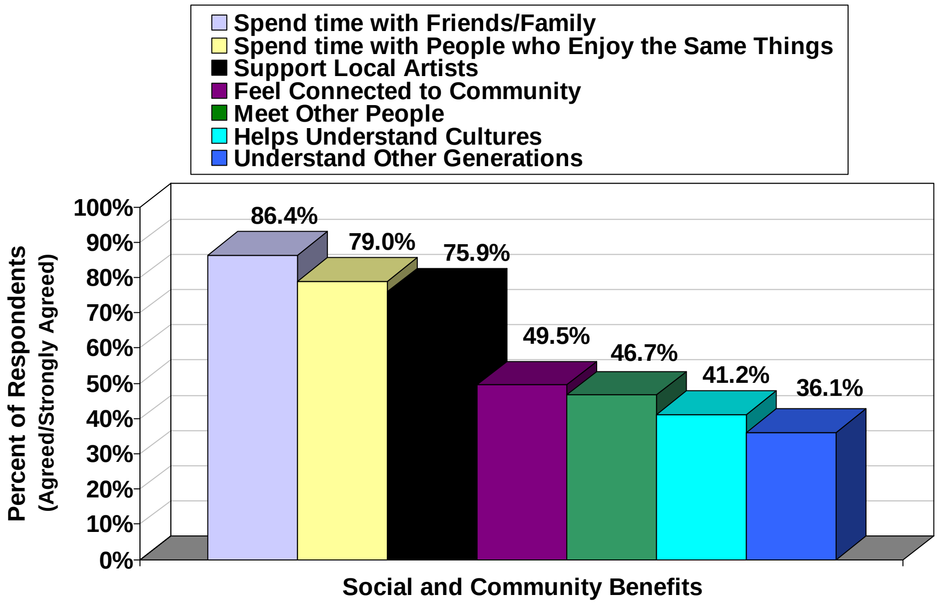
Figure 7.2: Individual Benefits of Attending a Live Music Performance



Social and Community Benefits

Respondents also rated seven social and community benefits of attending live music performances. The three highest rated social and community benefits of attending live music performances were: (1) Spend time with family and friends (86.4%); (2) Spend time with people who enjoy the same things (79.0%); and (3) Support local artists (75.9%).

Figure 7.3: Social and Community Benefits of Attending a Live Music Performance



Barriers to Attending Live Music Performances

Respondents were asked to rate thirteen barriers that might prevent them from attending more live music performances (LMPs). The top three barriers to attending live music performances more often were: (1) Cost of tickets is too expensive (66.1%); (2) My family or child care obligations keep me from attending (27.4%); and (3) I don't have enough time to attend LMPs (26.7%).

Table 7.4: Barriers Preventing Respondents from Attending Live Music Performances More Often

Barriers	Percent of Respondents (Agreed or Strongly Agreed)
The cost of tickets is too expensive	66.1%
My family or child care obligations keep me from attending	27.4%
I don't have enough time to attend LMPs	26.7%
I prefer to spend time in other ways	24.2%
It is difficult to get to or park at LMPs	23.7%
The kind(s) of LMPs I enjoy are not available in my area	23.4%
I do not have anyone to go with	15.2%
It is difficult to find information about LMPs	13.7%
Other Barriers	5.8%
LMPs are in unsafe or unfamiliar locations	4.7%
I have not enjoyed past LMPs	4.3%
I feel uncomfortable or out of place at LMPs	3.1%
LMPs do not appeal to me	2.6%

Information Sources

The three most frequently cited information sources used to find out about live music performances (LMPs) were: (1) Family and friends (93.2%); (2) Radio (FM/AM/Satellite) (90.7%); and (3) Print (newspapers or magazines) (87.7%).

Table 7.5: Information Sources Used by Respondents to Find Out about Live Music Performances

Information Sources	Percent of Respondents (Agreed or Strongly Agreed)
Friends or family	93.2%
Radio (FM/AM/Satellite)	90.7%
Print (newspapers or magazines)	87.7%
Posters or flyers	81.1%
Television	77.8%
Other LMPs or concerts	59.0%
Websites or blogs that review music	26.7%
Professional music industry association	21.8%
Myspace.com or similar site	16.7%
Music discussion forums	8.6%
Other	5.7%

Views of Live Music in Saskatchewan

A large majority of respondents (85.5%) valued live music performances (LMPs). A majority also had a high rating of the quality of LMPs in Saskatchewan. The results also suggest that respondents are having difficulty finding places in their local community that play live music. Finally, the results suggest that respondents have a much stronger preference for live music at nightclubs or lounges than restaurants.

Table 7.6: Views of Live Music in Saskatchewan

	Percent of Respondents (Agreed/Strongly Agreed)
I value live music performances	85.5% (1)
The quality of LMPs in Saskatchewan is excellent	60.5% (2)
There are a lot of opportunities to attend LMPs in Saskatchewan	60.4% (3)
It is easy to find information about LMPs	54.2% (4)
I prefer to go to nightclubs or lounges that have live music	53.1% (5)
I'm able to find places in my community that play live music I enjoy	41.1% (6)
I prefer to go to restaurants that have live music	28.7% (7)

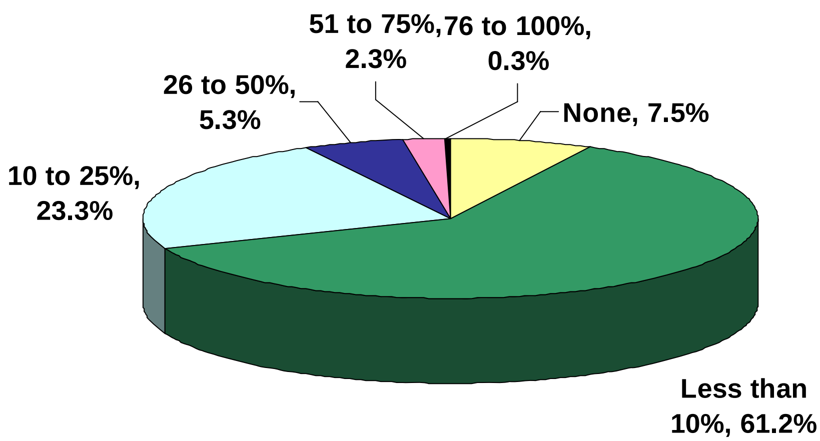
SECTION 8: MUSIC BY SASKATCHEWAN ARTISTS

Overall, the results indicated that more respondents attended live music performances by Saskatchewan artists than purchased pre-recorded and digital music by Saskatchewan artists.

Listened to Music by Saskatchewan Artists

Almost all respondents (92.5%) listened to music by Saskatchewan artists in 2006. However, over sixty percent of respondents (68.7%) listened to 10% or less of music by Saskatchewan artists.

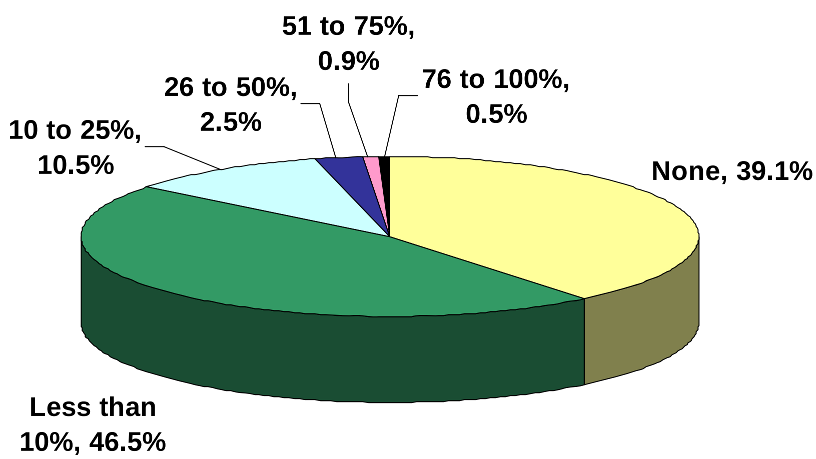
Figure 8.1: Proportion of Music Listened to by Respondents by Saskatchewan Artists



Purchase of Pre-Recorded Music by Saskatchewan Artists

The majority of respondents (60.9%) purchased at least some pre-recorded music by Saskatchewan artists in 2006. However, among these consumers of pre-recorded music by Saskatchewan artists, the majority (85.6%) indicated that less than 10% of the music they purchased in 2006 was by Saskatchewan artists.

Figure 8.2: Proportion of Pre-Recorded Music Purchased by Respondents by Saskatchewan Artists



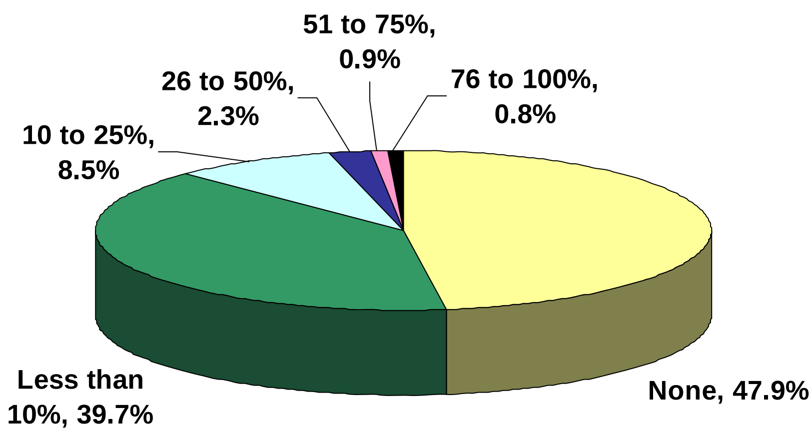
Percent of Music Purchased in Past Year by Saskatchewan Artists

Respondents who purchased at least one type of pre-recorded commercially produced music by Saskatchewan artists were more likely to purchase their music at traditional music stores and live music performances.

Downloaded Digital Music by Saskatchewan Artists

Of those respondents who downloaded music in 2006, 52.1% downloaded digital music by Saskatchewan artists. However, among the respondents who downloaded digital music, the majority (87.6%) indicated that less than 10% of the music they downloaded was by Saskatchewan artists.

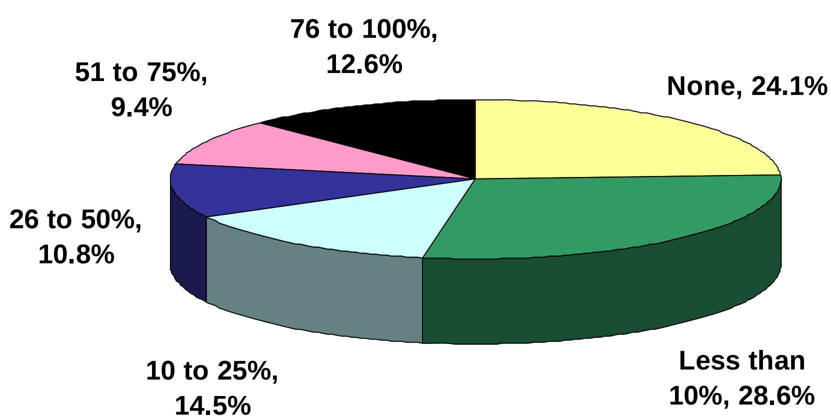
Figure 8.3: Proportion of Digital Music Downloaded by Respondents by Saskatchewan Artists



Live Music Performance Attendance by Saskatchewan Artists

Of those respondents who attended a live music performance (LMP) in 2006, 75.9% indicated that they attended LMPs by Saskatchewan artists.

Figure 8.4: Proportion of Live Music Performances that Respondents Attended by Saskatchewan Artists in 2006



Views of Saskatchewan's Music Industry

The results indicate that respondents valued the music talent in Saskatchewan and the importance of the music industry to Saskatchewan's economy. However, respondents had a lower level of agreement that it is easy to find information about Saskatchewan musicians.

Table 8.1: Respondents' Views of Saskatchewan's Music Industry

	Percent of Respondents **(Agreed/Strongly Agreed)**
I appreciate the music talent in the province	73.9% (1)
The music industry is important to Saskatchewan's economy	70.4% (2)
The quality of music education in Saskatchewan is excellent	36.5% (3)
It is easy to find information about Saskatchewan musicians	29.6% (4)

SECTION 9: COMMUNITY RESOURCES AND SATISFACTION WITH LIFE AND LEISURE

Community Resources

The highest rated of the six community resource items was “there are a lot of parks and open spaces” (80.4%). The lowest rated community resource item was “there are a lot of places in my community that have live music performances” (46.1%).

Table 9.1: Respondents’ Rating of Community Resource Items

In my community, there are a lot of…	Percent of Respondents (Agreed/Strongly Agreed)
Parks and open spaces	80.4% (1)
Sport or recreation opportunities	72.4% (2)
Things to do with my family or friends	64.7% (3)
Clubs or organizations I can join	61.1% (4)
Special events, festivals or cultural activities	61.1% (5)
Places that have live music performances	46.1% (6)

Attachment to Saskatchewan

Overall, a large majority of respondents had a high degree of attachment to Saskatchewan. The highest rated of the four attachment to Saskatchewan items was “I am proud to tell others where I live” (83.6%).

Table 9.2: Respondents’ Rating of Attachment to Saskatchewan Items

	Percent of Respondents (Agreed/Strongly Agreed)
I am proud to tell others where I live	83.6% (1)
I live in Saskatchewan because I want to	80.1% (2)
I think Saskatchewan is an ideal place to live	74.8% (3)
I would not want to move away from Saskatchewan	65.8% (4)

Life Satisfaction

Overall, the majority of respondents had a high rating of their life satisfaction. The highest rated of the life satisfaction items were: (1) I am satisfied with my life (73.7%); and (2) So far I have gotten the important things I want in life (72.5%).

Table 9.3: Respondents' Rating of Life Satisfaction Items

	Percent of Respondents (Agreed/Strongly Agreed)
I am satisfied with my life	73.7% (1)
So far I have gotten the important things I want in life	72.5% (2)
The conditions of my life are excellent	61.4% (3)
In most ways my life is close to ideal	57.6% (4)
If I could live my life over I would change almost nothing	47.2% (5)

Leisure Satisfaction

The results indicate that respondents were marginally satisfied with their leisure. The highest rated of the four leisure satisfaction items was "I do things during my leisure time that are fulfilling" (70.0%). The lowest rated item was "I participate in leisure time activities as often as I would like" (47.5%).

Table 9.4: Respondents' Rating of Leisure Satisfaction Items

	Percent of Respondents (Agreed/Strongly Agreed)
I do things during my leisure time that are fulfilling	70.0% (1)
I am satisfied with the way I spend my leisure time	59.8% (2)
Overall, the way I spend my leisure time is close to my ideal	59.5% (3)
I participate in leisure time activities as often as I would like	47.5% (4)

SECTION 10: COMPARISONS BY CONSUMPTION GROUPS

To better understand music purchasing behavior of respondents six groups were created using responses to three variables.

1) **Purchase of Pre-Recorded Commercially Produced Music**
   Respondents were asked to indicate how many pre-recorded (PR) commercially produced CDs, cassettes, vinyl records, or DVDs they purchased in the past year. Based on responses, two groups were created: a) Low PR (5 or less); and b) High PR (6 or more).
2) **Live Music Performance Attendance**
   Respondents were asked to indicate how many live music performances (LMP) they attended in the past year. Based on responses, two groups were created: a) Low LMP (4 or less); and b) High LMP (5 or more).
3) **Purchase of Digital Music**
   Respondents were asked to indicate how many digital music files they purchased in the past year. Two groups were created based on responses: a) Low Digital (No Digital); and b) High Digital (purchased digital music).

The six music consumption groups were as follows:

1) Low PR, Low LMP, Low Digital (n=249; 20.4%);
2) High PR, Low LMP, Low Digital (n=213; 17.4%);
3) High PR, Low PR, High Digital (n=167; 13.7%);
4) Low PR; High LMP, Low Digital (n=115; 9.4%);
5) High PR, High LMP, Low Digital (n=239; 19.5%); and
6) High PR, High LMP, High Digital (n=240; 19.6%).

Demographics by Consumption Groups

Comparisons were made on the demographics by six consumption groups. The results indicated that the high digital consumption groups were younger, more mobile, more likely to be single, and more likely to have a child living in their household. Moreover, high live music consumption groups tended to be more educated and live in communities over 50,000 people.

Table 10.1: Demographics by Consumption Groups

	Overall	**Low PR Low LMP Low Digital**	**High PR Low LMP Low Digital**	**High PR Low LMP High Digital**	**Low PR High LMP Low Digital**	**High PR High LMP Low Digital**	**High PR High LMP High Digital**
Age (years)	38.6	41.3	41.6	33.3	37.6	42.2	34.1
Level of Education (University Bachelors Degree or Higher)	33.1%	26.5%	26.4%	28.7%	37.7%	42.0%	37.9%
Employed Full-Time	61.4%	61.6%	61.5%	52.4%	54.6%	66.0%	66.0%
Community Size (50,000 or Larger)	51.0%	44.4%	41.0%	47.3%	62.3%	54.0%	60.8%
Years Lived In…							
Present Home	9.3	10.5	10.0	7.2	8.4	11.1	7.6
Present City	18.7	20.7	19.3	16.3	16.4	20.5	17.4
Saskatchewan	31.7	34.4	32.6	27.4	31.1	35.2	27.9
Married or Common Law	61.4%	69.9%	72.0%	53.6%	52.6%	67.1%	47.5%
At least One Child	45.7%	40.6%	49.8%	57.6%	32.7%	39.9%	51.1%

Music Genres Listened to at Least Once per Week by Consumption Groups

Comparisons were made on 14 music genres listened to at least once a week by six consumption groups. There were significant differences on 12 of the 14 music genres by consumption groups.

Overall, the findings suggest respondents in the high music consumption groups were more likely to listen to a wide variety of music genres. Also, respondents in the digital consumption groups were more likely to listen to non-traditional music genres than other consumption groups.

Table 10.2: Music Genres Listened to at Least Once per Week by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Rock	79.3% (1)	69.8% (1)	81.7% (1)	83.8% (1)	78.3% (1)	75.7% (1)	87.9% (1)
Current Hits or Pop	73.0% (2)	69.4% (2)	70.4% (2)	82.6% (2)	77.4% (2)	60.3% (2)	82.9% (2)
Alternative	44.1% (3)	23.7% (3)	30.1% (3)	49.7% (3)	54.8% (3)	46.0% (3)	66.7% (3)
Rhythmn and Blues	30.4% (4)	17.7% (5)	26.3% (4)	34.7% (6)	35.7% (4)	31.8% (5)	40.4% (6)
Hip-Hop	29.0% (5)	17.3% (6)	23.9% (6)	43.7% (4)	28.7% (6)	21.8% (9)	42.5% (4)
Dance	27.2% (6)	19.7% (4)	25.8% (5)	38.3% (5)	24.4% (7)	24.3% (8)	32.9% (7)
Jazz or Blues	27.1% (7)	9.2% (8)	21.1% (8)	15.6% (9)	34.8% (5)	39.8% (4)	42.5% (5)
Roots, Folk or World	19.8% (8)	7.6% (10)	17.4% (9)	10.2% (11)	17.4% (9)	29.7% (6)	32.5% (8)
Classical or Opera	19.1% (9)	8.8% (9)	16.9% (10)	13.2% (10)	20.9% (8)	26.4% (7)	27.9% (9)
Children's Music	16.8% (10)	13.7% (7)	23.0% (7)	21.0% (7)	12.2% (10)	15.1% (10)	15.8% (11)
Electronica	13.2% (11)	5.6% (11)	8.9% (11)	19.8% (8)	8.7% (11)	13.8% (11)	21.7% (10)
Other	8.8% (12)	4.4% (12)	5.6% (12)	9.0% (12)	8.7% (12)	11.3% (12)	13.3% (12)

Music Sources by Consumption Groups

Comparisons were made on six music sources by six consumption groups. There were significant differences on five of the six music sources by consumption groups. The low pre-recorded, live music performance and digital consumption group used all music sources less than the other groups. For the most part, the order remained consistent across consumption groups with the exception of groups that had a high consumption of pre-recorded and digital music. As expected, groups with high level of pre-recorded and digital music consumption were more likely to use a computer or portable digital player compared to the other groups.

Language of Music Listened to by Consumption Groups

Respondents in the high live music consumption groups were more likely to listen to music in languages other than English.

Table 10.3: Music Sources and Language of Music by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Music Sources							
CD, Cassettes, Vinyl	76.0% (1)	56.2% (1)	79.8% (1)	72.5% (1)	71.3%(1)	90.4% (1)	83.8% (1)
TV – Incl. Music DVDs	56.5% (2)	45.8% (2)	60.6% (2)	56.9% (4)	57.4% (2)	53.1% (2)	66.7% (4)
Computer	51.5% (3)	32.1% (3)	42.7% (3)	68.3% (2)	42.6% (3)	45.2% (3)	78.3% (2)
Portable Digital Music Player	43.6% (4)	22.9% (4)	31.9% (4)	62.9% (3)	37.4% (4)	38.1% (4)	70.8% (3)
Satellite Radio	19.6% (5)	14.1% (5)	20.2% (5)	30.5% (5)	9.6% (5)	13.8% (5)	27.9% (5)
Languages Other Than English	21.0%	8.5%	15.5%	20.4%	20.0%	31.0%	29.6%

Participation in Music-Related Activities by Consumption Groups

Comparisons were made on eight music-related activity participation variables (at least once in past year) by six consumption groups. There were significant differences on all eight music-related activity participation variables by consumption groups.

Overall, the findings suggest respondents in the high music consumption groups were more likely to participate in music-related activities. This finding suggests that individuals who are actively engaged in music-related activities should be a major target market for pre-recorded, digital and live music performances.

Table 10.4: Participation in Eight Selected Music-Related Activities by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Play a musical instrument	48.0% (1)	28.9% (1)	40.1% (1)	39.5% (1)	52.2% (1)	59.4% (1)	67.1% (1)
Volunteer at a music-related event or organization	31.3% (2)	15.7% (3)	18.9% (2)	17.4% (4)	45.2% (2)	45.6% (2)	47.1% (2)
Perform or assist in a music production	22.9% (3)	8.0% (5)	8.5% (8)	10.2% (7)	39.1% (3)	35.6% (3)	39.6% (4)
Participate in a music-related review	21.4% (4)	9.2% (4)	13.7% (5)	24.0% (2)	13.9% (8)	23.9% (6)	40.4% (3)
Sing in a choir or singing group	20.5% (5)	16.1% (2)	17.0% (3)	16.2% (5)	22.6% (6)	24.7% (5)	26.3% (7)
Take a music lesson or class	19.8% (6)	6.0% (7)	14.6% (4)	19.8% (3)	23.5% (5)	22.2% (7)	34.6% (5)
Perform or play with a music group or band	19.0% (7)	7.2% (6)	10.9% (7)	9.0% (8)	29.6% (4)	29.7% (4)	29.6% (6)
Participate in any music-related fan clubs	14.7% (8)	4.4% (8)	12.3% (6)	15.0% (6)	14.8% (7)	15.9% (8)	26.3% (8)

Information Sources for New Music by Consumption Groups

Comparisons were made on the information sources in which respondents used to find out about new music by the six consumption groups. There were significant differences in seven of nine information sources by consumption group. The low pre-recorded, live music performance and digital consumption group (LLL) used all music sources less than the other groups. As expected, a greater percentage of respondents who attended live music performances used live music performances to find out about new music. Also, as expected, high digital respondents used three technical sources including: websites, or blogs that review or critique music, myspace.com or similar site and online music discussion forums.

Table 10.5: Information Sources Used to Find Out About New Music by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Friends or family	86.4% (1)	77.1% (2)	86.9% (2)	81.4% (2)	92.2% (1)	90.0% (1)	92.9% (1)
Television	82.1% (2)	83.9% (1)	88.7% (1)	83.2% (1)	74.8% (3)	77.0% (3)	82.1% (3)
Live Music Performances or Concerts	66.2% (3)	47.4% (4)	53.1% (4)	53.3% (4)	77.4% (2)	82.9% (2)	84.6% (2)
Print (newspapers or magazines)	60.3% (4)	51.0% (3)	60.6% (3)	53.9% (3)	60.0% (4)	65.7% (4)	68.8% (4)
Websites or blogs that review or critique music	39.4% (5)	19.7% (5)	36.2% (5)	47.9% (5)	38.3% (5)	39.3% (5)	57.5% (5)
Myspace.com or similar site	21.9% (6)	8.0% (6)	14.6% (6)	27.0% (6)	24.4% (6)	25.5% (6)	34.6% (6)
Music discussion forums	10.8% (7)	4.0% (7)	7.5% (7)	14.4% (7)	7.8% (7)	11.3% (7)	19.2% (7)

Pre-Recorded Music by Consumption Groups

Comparisons were made on the total number of pre-recorded music and number of pre-recorded converted to digital music by six consumption groups. The two highest live music consumption groups had a significantly larger inventory of pre-recorded music. As expected, the high digital consumption groups were much more likely to have converted their pre-recorded music inventory to digital files.

Table 10.6: Pre-Recorded Music by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Total Number of Pre-Recorded Music	217.6	118.9	211.0	166.5	147.4	308.5	305.0
Number of Respondents that Converted Pre-Recorded to Digital	51.9%	31.3%	34.8%	74.2%	44.0%	51.7%	77.2%

Location of Pre-Recorded Music Purchase by Consumption Groups

Respondents that had high live music and high pre-recorded music consumption were more likely to purchase their music at traditional music stores, live music performances/concerts, second-hand stores, and online stores than other consumption groups. Respondents with high pre-recorded music and low live music consumption were more likely to purchase their pre-recorded music at big box stores.

Table 10.7: Location of Pre-Recorded Music Purchase by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Traditional Music Store	78.7% (1)	62.9% (2)	77.9% (1)	73.3% (2)	79.8% (1)	85.8% (1)	87.7% (1)
Big Box Stores	74.2% (2)	77.5% (1)	77.9% (2)	84.7% (1)	67.9% (2)	65.3% (2)	73.1% (2)
Concerts or Live Performances	35.3% (3)	10.1% (3)	21.6% (3)	16.7% (4)	47.6% (3)	56.5% (3)	53.3% (3)
Second Hand Stores	20.8% (4)	10.1% (4)	18.3% (4)	12.0% (5)	14.3% (4)	28.5% (4)	31.7% (5)
Online Store	19.8% (5)	6.2% (5)	16.0% (5)	20.0% (3)	3.6% (5)	23.9% (5)	35.7% (4)

Views of Live Music in Saskatchewan by Consumption Groups

As expected, groups with high live music consumption had a more positive view of live music in Saskatchewan than the other consumption groups. The results also indicate that the low live music consumption groups found it more difficult to find information about live music performances than other consumption groups.

Table 10.8: Views of Live Music in Saskatchewan

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
I value live music performances	85.6% (1)	70.6% (1)	83.0% (1)	78.7% (1)	92.1% (1)	95.8% (1)	95.0% (1)
The quality of live music performances in Saskatchewan is excellent	60.4% (2)	46.2% (3)	59.6% (2)	50.9% (3)	65.5% (3)	68.9% (3)	71.4% (2)
A lot of opportunities to attend live music performances in Saskatchewan	60.3% (3)	51.4% (2)	53.1% (4)	50.3% (4)	67.5% (2)	71.9% (2)	67.9% (3)
Easy to find information about live music performances in Saskatchewan	53.9% (4)	44.5% (4)	54.7(3)	49.7% (5)	57.5% (5)	61.1% (5)	57.1% (5)
I prefer to go to nightclubs or lounges that have live music	53.0% (5)	35.9% (5)	46.2% (5)	54.5% (2)	60.5% (4)	62.3% (4)	63.2% (4)
I prefer to go to restaurants that have live music	28.5% (6)	16.3% (6)	27.4% (6)	28.9% (6)	36.3% (6)	33.6% (6)	32.9% (6)

Benefits of Attending Live Music Performance by Consumption Groups

Overall, the results of these comparisons provide insights that can assist artists and venue operators in increasing the satisfaction of their live music patrons through a better understanding of the benefits patrons are seeking.

Individual Benefits

As expected, the high live music consumption groups rated the individual benefits of attending live music performances higher than the other three consumption groups. The three individual benefits with the greatest differences were: (1) Encourages me to be creative; (2) Increase my awareness of new music; and (3) Motivates me to keep playing music. This supports other results which indicated that individuals who are actively involved in creating or playing music are more likely to be high consumers of live music performances.

Table 10.9: Individual Benefits of Attending Live Music Performances by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Makes me feel good	93.2% (1)	87.0% (1)	92.3% (1)	92.3% (1)	94.8% (1)	96.2% (1)	94.6% (1)
Improve my mood	76.8% (2)	66.2% (2)	74.8% (2)	73.6% (2)	81.1% (2)	80.4% (2)	80.8% (2)
Increase awareness of new music	65.5% (3)	46.5% (4)	58.6% (4)	51.2% (4)	67.3% (4)	78.1% (3)	76.3% (3)
Stress relief	63.0% (4)	51.6% (3)	62.7% (3)	61.2% (3)	66.4% (5)	65.3% (5)	67.9% (4)
Encourages me to be creative	56.3% (5)	38.1% (5)	42.1% (5)	48.8% (5)	68.4% (3)	65.4% (4)	65.7% (5)
Keeps my mind sharp	38.6% (6)	34.2% (6)	30.9% (6)	26.6% (6)	37.8% (7)	47.9% (6)	43.5% (7)
Motivates me to keep playing music	36.5% (7)	24.0% (7)	29.3% (7)	25.8% (7)	38.6% (6)	46.4% (7)	43.8% (6)

Social and Community Benefits

Again, as expected, the high live music consumption groups rated the social and community benefits of attending live music performances higher than the other three consumption groups. The three social and community benefits with the greatest differences were: (1) Support local artists; (2) Help understand other cultures better; and (3) Meet other people. It is worth noting that the benefit of supporting local artists was rated very highly by respondents in the three high live music consumption groups. This suggests that venues that demonstrate their support for local artists will have an advantage over those that do not.

Table 10.10: Social and Community Benefits of Attending Live Music Performances by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Support local artists	75.9% (2)	60.1% (2)	74.3% (2)	55.0% (2)	82.6% (1)	86.6% (1)	84.5% (1)
Feel connected to my community	49.4% (3)	43.8% (3)	38.9% (3)	31.0% (3)	54.4% (4)	63.4% (3)	52.9% (3)
Meet other people	46.6% (4)	32.3% (4)	38.6% (4)	36.7% (4)	54.9% (3)	57.4% (4)	51.5% (4)
Help understand other cultures better	41.0% (5)	29.2% (5)	35.5% (5)	28.9% (5)	38.6% (5)	57.0% (5)	43.5% (5)
Understand other generations	36.1% (6)	26.1% (6)	34.3% (6)	22.2% (6)	36.0% (6)	47.7% (6)	39.2% (6)

Barriers to Attending More Live Music Performances by Consumption Groups

Comparisons were made on barriers to attending more live music performances by six consumption groups. The results suggest that low live music consumption groups are much more likely to perceive the cost of tickets as too expensive, than those in the high consumption groups. This suggests that artists and venues have an opportunity to address this perceived expense by communicating that the majority of live music performances, especially those by local artists, have very reasonable ticket prices.

Table 10.11: Barriers of Attending More Live Music Performances by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Cost of tickets is too expensive	66.1% (1)	75.5% (1)	75.2% (1)	73.6% (1)	72.8% (1)	53.4% (1)	59.9% (1)
Family or child care obligations	27.5% (2)	23.2% (4)	37.0% (2)	30.2% (3)	18.6% (3)	23.3% (2)	31.7% (2)
Prefer to spend leisure time in other ways	24.3% (3)	33.1% (2)	28.8% (3)	34.4% (2)	26.6% (2)	17.3% (4)	16.5% (4)
Kinds of live music performances I enjoy are not available	23.4% (4)	28.4% (3)	28.6% (4)	28.7% (4)	16.1% (4)	19.7% (3)	21.5% (3)
In unsafe or unfamiliar locations	4.8% (5)	5.8% (7)	2.2% (6)	7.8% (5)	6.3% (5)	1.7% (6)	6.3% (5)
Have not enjoyed in the past	4.3% (6)	9.0% (6)	2.9% (5)	3.9% (6)	5.3% (6)	2.1% (5)	3.8% (6)
Do not appeal to me	2.6% (7)	10.3% (5)	0.7% (7)	1.6% (7)	3.5% (7)	0.9% (7)	0.4% (7)

Music by Saskatchewan Artists by Consumption Groups

The results suggest that respondents in the high live music consumption groups were much more likely to purchase pre-recorded music and attend performances by Saskatchewan artists. These results are consistent with the finding that a key benefit of attending live music performances was to support local artists.

Table 10.12: Music by Saskatchewan Artists by Consumption Groups

Music by Saskatchewan Artists	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
Purchased Pre-Recorded Music	60.9%	41.2%	58.9%	43.9%	51.8%	75.2%	75.8%
Downloaded Digital Music	52.2%	36.1%	52.3%	46.0%	54.6%	47.4%	64.2%
Attended Live Music Performances	75.9%	54.2%	62.1%	49.2%	88.5%	91.0%	89.4%

Views of Saskatchewan Music

As expected, high live music consumption groups had a much more positive view of Saskatchewan music than the low consumption groups. The low ratings across all six consumption groups on two items (ease of finding information about SK artists; and quality of music education in SK) suggest areas for improvement that need to be addressed.

Table 10.13: Views of Saskatchewan Music by Consumption Groups

	Overall	Low PR Low LMP Low Digital	High PR Low LMP Low Digital	High PR Low LMP High Digital	Low PR High LMP Low Digital	High PR High LMP Low Digital	High PR High LMP High Digital
I appreciate the music talent in the province	73.8% (1)	64.1% (1)	72.6% (1)	60.2% (1)	75.2% (2)	85.2% (1)	82.1% (1)
The music industry is important to the Saskatchewan economy	70.2% (2)	59.5% (2)	72.2% (2)	56.3% (2)	77.3% (1)	81.9% (2)	74.5% (2)
The quality of music education in Saskatchewan is excellent	36.4% (3)	29.6% (3)	35.2% (3)	31.1% (3)	37.7% (3)	41.3% (3)	42.5% (3)
It is easy to find information about Saskatchewan musicians	29.4% (4)	23.8% (4)	29.6% (4)	22.8% (4)	36.0% (4)	34.0% (4)	32.1% (4)