

**STUDY OF AUDIOVISUAL
CONTENT CONSUMPTION
HABITS AND THE
EXPECTATIONS AND
PERCEPTIONS OF THE
CANADIAN PUBLIC**

TELEFILM PARTNER
C A N A D A OF ►
CHOICE

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CONTEXT AND OBJECTIVES


CONTEXT AND METHODOLOGY

Léger was mandated by Telefilm Canada to conduct a study on the Canadian public's audiovisual content consumption habits. More specifically, this study aims to:

- Understand the consumption habits of Canadians and how to better reach audiences on various screens and platforms;
- Measure the level of audience engagement with Canadian content and identify opportunities to connect with audiences to develop a better knowledge and understanding of Canadians' consumption habits of films and other cultural products;
- To measure Canadians' perceptions and expectations of the film industry and the role of an organization such as Telefilm Canada and its profile.

To meet these objectives, a web-based survey was conducted between October 23 and November 6, 2020 with Canadians aged 18 years and older who could speak either English or French. To ensure a more accurate reading of the population's opinion, a sample of nearly 100 Canadians aged 13 to 17 was also surveyed. A total of 1,875 respondents completed the entire questionnaire.

The final survey data was weighted by gender, age, region, language, presence of children in the household, and education to ensure a representative sample of the Canadian population. For comparison purposes, a probability sample of 1,875 respondents would have a margin of error of +/-2.26 per cent 19 times out of 20.

- Please note that the numbers presented have been rounded. However, the numbers before rounding are used to calculate the sums presented. Therefore, the sums may not correspond to the manual addition of the numbers presented.
- Data in **bold red** characters indicate a significantly **lower** proportion than that of other respondents. Conversely, data in **bold green** characters indicate a significantly **higher** proportion than that of other respondents.
- Results with statistically significant and relevant differences are shown in boxes with this symbol : 

A hand holding a black remote control in the foreground, pointing towards a television screen in the background. The screen displays colorful, abstract, blurred patterns in shades of blue, green, and purple. A semi-transparent grey banner is overlaid across the bottom half of the image, containing the text "OUTLINE OF THE STUDY".

OUTLINE OF THE STUDY

Outline of the study

Content delivery platforms are well adopted by Canadians

Content delivery platforms such as Netflix and Amazon Prime are popular amongst Canadians. Eight out of ten (80%) respondents subscribe to at least one of these platforms.

Canadians consume little Canadian/Québec content, but Quebecers stand out

On average, Canadians watch 18.7 hours of audiovisual content per week. Of this, an average of 4.5 hours is spent watching Canadian/Québec content. Therefore, only a quarter of Canadians' viewing time is devoted to content created here.

Quebecers are among those who watch the most Canadian/Québec audiovisual content with an average of 7.8 hours. This is a trend that can be observed for several other indicators surveyed. Quebecers seem to have a stronger sense of belonging to Canadian/Québec content than respondents from other provinces. The opposite trend is observed among racialized communities, which represent the subgroup of the population that watches the least Canadian/Québec audiovisual content.

The preferred platforms for watching Canadian/Québec content differ

As for the platforms used to watch content, online services such as Netflix are favoured by Canadians. On average, almost 40% of their viewing time is spent on these platforms, followed by linear television with almost 30%. When it comes to Canadian/Québec content, the opposite trend is noticeable. Linear television is the platform most used by Canadians, followed by online services. Moreover, over the last three years, online services have seen the greatest increase in viewing time. Four out of ten Canadians (41%) say their viewing of content on online services has increased, which represents the largest increase among all platforms. The availability of Canadian/Québec content on online services is an important issue that must be considered in order to increase the visibility of this content.

Outline of the study

The story told prevails over all other selection criteria

The three most important selection criteria for Canadians when choosing content are the story being told, the genre and the actors. Recommendations from family and friends follow closely as an important element in Canadians' decision-making process. The criteria that are least important in the decision-making process are the country of origin of the content, the writer of the script and the prizes won.

For Canadian/Québec content specifically, the most important selection criteria are the same, but there is a difference in the least important criteria. These criteria are the prizes won, the recommendations of film critics and the producer or director of the content.

Canadian/Québec content: entertaining, but reaches a smaller audience

The characteristics most associated with Canadian/Québec content are that it is entertaining, presents stories that resonate with Canadians, and features diverse characters. It should be noted that Quebecers are significantly more likely to associate these three positive characteristics with Canadian/Québec content. Although *Entertaining* is the characteristic most associated with Canadian/Québec content, an even greater proportion associate this characteristic with American content. American content and Canadian/Quebec content are similar on several characteristics, but Canadian/Quebec content is perceived to be a more niche content by respondents, as it appears to reach a smaller audience than American content.

When compared to the American and foreign content, Canadian/Quebec content is perceived as reaching a smaller audience than American content, but a larger audience than foreign content. Although Canadian/Quebec content offers content that resembles Canadians, perceptions of boring and out-of-date content are more associated with it than with content from other origins, although these perceptions are weakly shared by all respondents.

Outline of the study

Canadians would like to see more Canadian/Québec content being promoted

Three-quarters of Canadians agree that additional efforts should be made to promote Canadian/Québec content both inside and outside Canada. Similarly, almost seven out of ten Canadians believe that Canadian/Québec content is not sufficiently promoted. This proportion is significantly higher among Quebecers.

A majority (56%) agree that Canadian/Québec content is easy to find. Greater promotion could increase visibility and thus provide easier access to Canadian/Québec content.

Canadians from racialized communities feel less well represented on the screen

One in two Canadians believe that the characters in Canadian/Québec content represents the diversity of the Canadian population and the same proportion say they can identify with the characters in Canadian/Québec content.

Canadians from racialized communities are significantly more likely to think that minority groups should occupy more space on the screen (60% vs. 49%), that they do not feel adequately represented in Canadian/Québec content (45% vs. 34%) and are significantly less likely to think that content is made for people like them (40% vs. 47%).

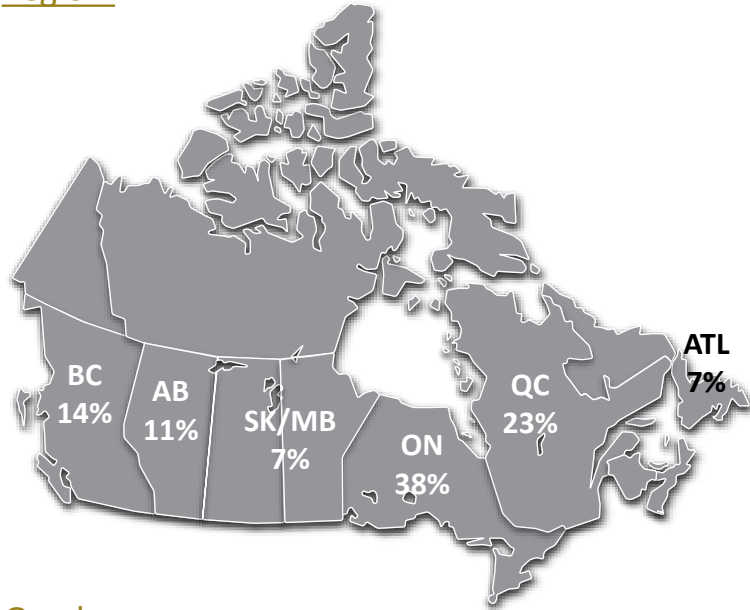
As Telefilm Canada has already begun the path towards better representation of the Canadian population on screens, these results demonstrate the relevance and necessity of such an approach.



RESPONDENT PROFILE

RESPONDENT PROFILE

Region:



Gender:



48%

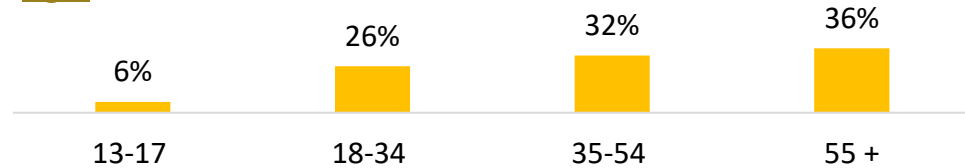


51%

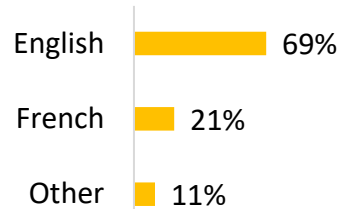


1%

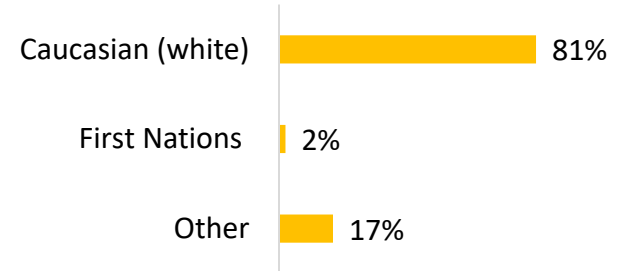
Age:



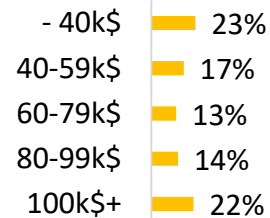
Language:



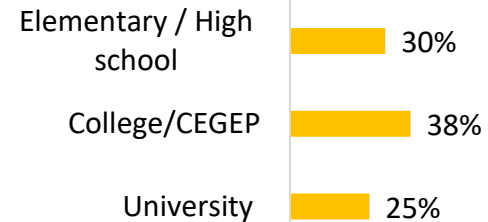
Ethnicity:



Income:



Education:





MEDIA CONSUMPTION AND CONTENT DELIVERY PLATFORMS

MEDIA CONSUMPTION AND CONTENT DELIVERY PLATFORMS

WEEKLY CONTENT CONSUMPTION

The portrait of media consumption is changing rapidly in Canada. Social media now occupies the top position in terms of the media most consulted by Canadians on a weekly basis. More than eight in ten respondents (81%) use social media on a weekly basis; primarily Facebook (63%), YouTube (52%), and Instagram (38%). Television comes in second place (62%); both conventional television (57%) and specialty channels (35%). News is consulted by six out of ten respondents (60%), whether through websites (46%), print newspapers (20%) or mobile applications (19%). Radio is tuned in on a weekly basis by half of the respondents (54%).

SUBSCRIPTION TO CONTENT DELIVERY PLATFORMS (ONLINE AND ON-DEMAND)

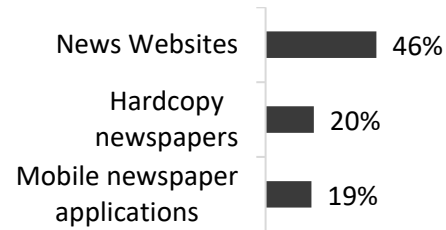
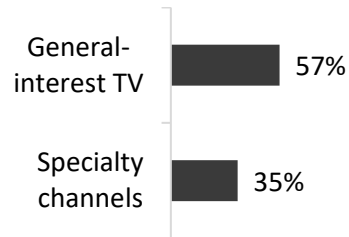
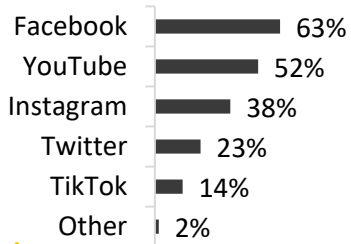
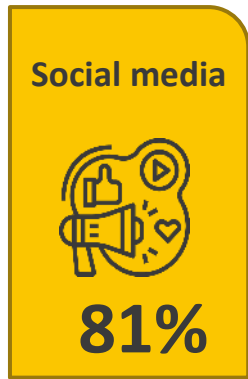
The adoption of content delivery platforms is fairly widespread in Canada. Eight out of ten respondents (80%) have at least one subscription and, on average, subscribe to 2.5 platforms. Netflix is the most popular platform with the largest number of subscribers (65%), followed by Amazon Prime Video (41%), Disney + (21%), Crave (18%) and Apple TV (12%). Less than one in ten Canadians subscribe to platforms such as ICI TOU.TV, Gem, Illico, ICI TOU.TV Extra and Unis TV.

Ontario and Alberta have significantly more subscribers to online or on-demand content delivery platforms. Young people aged 18-34 are the most likely Canadians to subscribe to this type of platform, as are households with an annual income of over \$100K.

MEDIA CONSUMPTION

Do you listen, watch, read or consult the following media regularly

Base: All respondents (n=1,875)

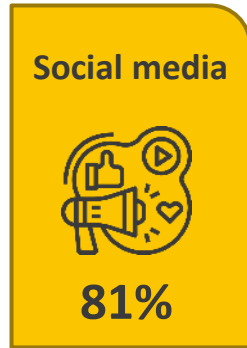


Social media is the most consulted media by all Canadians. This proportion is even higher among the respondents aged 13 to 17 years old (91%) and among the 18-34 year old (94%). Television (85%) and news (71%) are more consumed by respondents aged 55 and older.

MEDIA CONSUMPTION – User profile

Do you listen, watch, read or consult the following media regularly

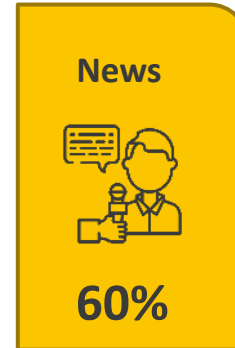
Base: All respondents (n=1,875)



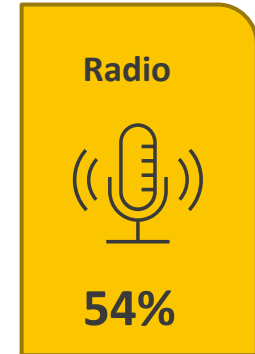
13 -17 years old	91%
18-34 years old	94%
Women	84%



55 years and +	85%
Francophones	72%
Quebecers	70%



55 years and +	71%
Francophones	65%
Quebecers	65%

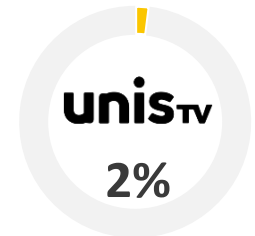
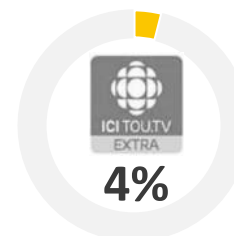
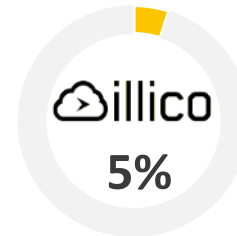
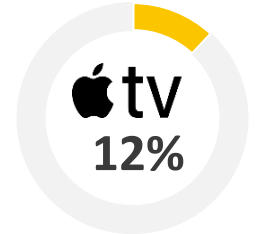
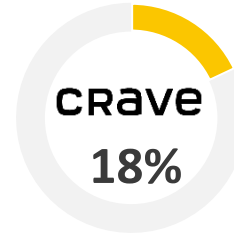
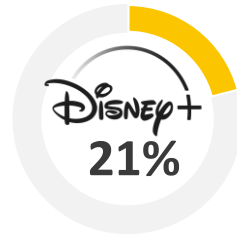
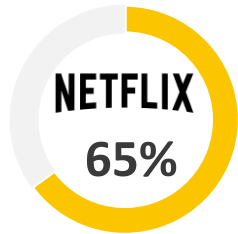


55 years and +	63%
35-54 years old	58%

SUBSCRIPTION TO CONTENT DELIVERY PLATFORMS

Do you subscribe to the following content delivery platforms?

Base: All respondents (n=1,875)



80% of Canadians subscribe to at least one platform. On average, Canadians subscribe to 2.5 platforms.

SUBSCRIPTION TO CONTENT DELIVERY PLATFORMS - *USER PROFILE*

Do you subscribe to the following content delivery platforms?

Base: All respondents (n=1,875)

Who are the Canadians who subscribe to content delivery platforms?



Province	Alberta, Manitoba/Saskatchewan, Ontario
Age	18-34 years old
Language	English
Income	100K +



Respondents between the ages of 18 and 34 are more likely to subscribe to 2 or more delivery platforms, while respondents over the age of 55 are more likely not to subscribe to any content delivery platform. The platforms most popular with Canadians (Netflix, Amazon Prime Video, Disney + and Crave) are significantly less popular in Québec.

SUBSCRIPTION TO CONTENT DELIVERY PLATFORMS - USER PROFILE (Details)

Do you subscribe to the following content delivery platforms?

Base: All respondents

	Total	Province						Age				Language			Income				
		ATL	QC	ON	MB/SK	AB	BC	13-17	18-34	35-54	55+	FR	EN	Other	- 40k\$	40-59k\$	60-79k\$	80-99k\$	100k\$+
<i>% Yes presented</i>	n= 1 875	137	433	712	135	215	243	98	466	632	679	410	1 226	238	371	298	242	270	506
Netflix	65%	67%	57%	66%	74%	72%	65%	85%	86%	66%	46%	58%	69%	57%	55%	63%	68%	72%	77%
Amazon Prime	41%	37%	25%	47%	42%	57%	38%	47%	53%	45%	27%	22%	47%	39%	29%	40%	44%	49%	52%
Disney +	21%	24%	15%	22%	33%	32%	16%	28%	43%	20%	7%	16%	24%	18%	17%	20%	23%	30%	24%
Crave	18%	20%	11%	20%	23%	28%	16%	22%	21%	17%	17%	11%	22%	11%	14%	15%	17%	25%	25%
Apple TV	12%	10%	10%	12%	16%	14%	17%	17%	19%	13%	7%	9%	13%	14%	10%	11%	13%	15%	15%
Tou.tv (Free)	9%	4%	32%	1%	1%	3%	2%	12%	10%	9%	8%	35%	2%	3%	9%	8%	12%	8%	9%
CBC GEM	9%	12%	3%	11%	15%	10%	9%	9%	5%	11%	11%	3%	12%	6%	9%	9%	9%	11%	11%
Club illico	5%	0%	20%	1%	1%	1%	2%	6%	5%	5%	7%	21%	2%	0%	5%	7%	6%	6%	4%
Tou.tv Extra	4%	1%	12%	1%	0%	1%	2%	8%	4%	3%	3%	12%	2%	1%	3%	4%	5%	4%	3%
Unis TV	2%	1%	7%	0%	1%	1%	1%	2%	1%	3%	2%	8%	1%	0%	2%	2%	2%	3%	2%
<i>Average number of subscriptions</i>	2,5	2,4	2,5	2,4	2,6	2,8	2,2	2,9	2,8	2,5	2,1	2,4	2,5	2,2	2,4	2,3	2,5	2,7	2,7

* Only the results for the five platforms most popular with Canadians are presented.

A person is seen from behind, sitting in a dimly lit room and watching a television. The TV screen shows a blurred image of people in bright colors, possibly a sports event. The person's hand is visible, holding a grey remote control with a finger on a button. A semi-transparent grey banner is overlaid across the middle of the image, containing white text.

AVERAGE HOUR OF VIEWING OF AUDIOVISUAL CONTENT

AVERAGE HOUR OF VIEWING OF AUDIOVISUAL CONTENT

HOUR OF WATCHING AUDIOVISUAL CONTENT

Canadians watch an average of 18.7 hours of audiovisual content per week. Of these, 4.5 hours are devoted to Canadian or Québec audiovisual content, representing a quarter of the time spent viewing content (24%).

Only a very small proportion (3%) of respondents say they do not watch audiovisual content in general. This proportion is much higher when considering Canadian or Québec content.

Nearly one-third of respondents (32%) said they never watch Canadian or Québec audiovisual content. Only one respondent in ten (10%) said they consume more than 10 hours of Canadian or Québec audiovisual content per week.

EFFECT OF THE HEALTH CRISIS ON THE CONSUMPTION OF AUDIOVISUAL CONTENT

Almost half of the respondents (49%) say they have watched more audiovisual content since the beginning of the COVID-19 pandemic.

Only a minority (5%) say they are consuming less than before. The impact of the pandemic has had less of an effect on Canadian or Québec content. More than eight out of ten respondents say they watch as much Canadian or Québec audiovisual content as before the pandemic.

Only one in ten (10%) say they are consuming more Canadian or Québec content and about the same number (9%) say they are consuming less than before the pandemic.

EFFECT OF THE HEALTH CRISIS ON THE NUMBER OF HOURS OF WATCHING AUDIOVISUAL CONTENT (CONTINUED)

Respondents who have been watching more audiovisual content since the beginning of the pandemic estimate that they have been watching 11.2 hours more than before, while those who say they have been watching less estimate that they have been watching 4.2 hours less.

On average, this represents an additional 10.2 hours per week of audiovisual viewing among Canadians since the beginning of the pandemic. In terms of Canadian or Québec audiovisual content, some respondents report watching an average of 7.3 hours more content on a weekly basis, while others report watching 4.3 hours less than in the years prior to the pandemic. On average, 4.4 hours more of Canadian or Québec content is watched on a weekly basis than before the pandemic.



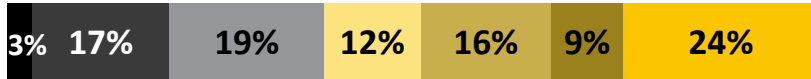
AVERAGE VIEWING HOURS

How many hours per week do you spend watching audiovisual content?

Base: all respondents (n=1,875)



18.7 hours of audiovisual content per week on average.



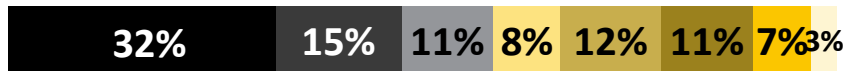
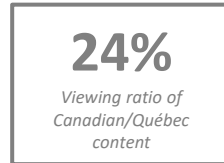
■ None ■ 5h or less ■ 6-10 h ■ 11-15h ■ 16-20h ■ 21-29h ■ 30h and +

How many hours do you spend viewing **CANADIAN/QUÉBEC** audiovisual content?

Base: Respondents who watch at least one hour of content per week (n=1,819)



4.5 hours of Canadian/Québec audiovisual content per week on average.



■ None ■ 1h ■ 2h ■ 3h-4h ■ 5h-6h ■ 7h-10h ■ 11h-20h ■ More than 20h

Only 3% of Canadians do not watch any audiovisual content per week. Among the respondents who consume the most content are Canadians aged 55 and older and Ontario residents, who have averages of 22.3 hours and 20.1 hours per week respectively.

One-third of Canadians who watch at least one hour of audiovisual content per week do not listen to Canadian/Québec content.

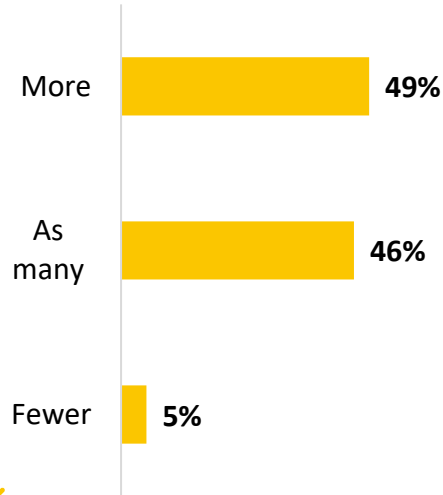
On average, one-quarter (24%) of Canadians' viewing time is devoted to Canadian/Québec content. Among Canadian provinces, Québec has the highest weekly viewing average time of 7.8 hours of content viewing per week. Similarly, there is a significant difference between French-speaking Canadians (8 hours on average) and English-speaking Canadians (3.7 hours on average).

Finally, members of racialized communities are those who watch the least hours of Canadian/Québec content, with an average of 2.8 hours per week.

IMPACT OF THE PANDEMIC ON AVERAGE VIEWING HOURS

Would you say that you spend more, as many, or fewer hours per week watching audiovisual content since the beginning of the pandemic?

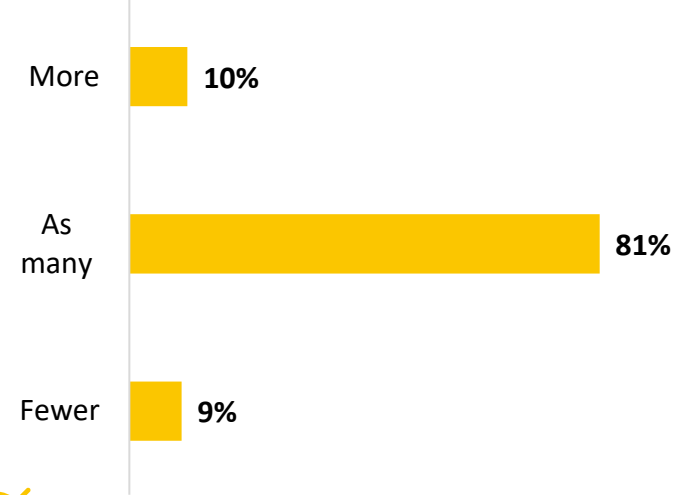
Base: All respondents (n=1,875)



For nearly one in two Canadians, the COVID-19 pandemic has had no impact on their audiovisual content consumption habits. For those who did experience changes, they consumed an average of 11.2 hours more per week. Only a very small proportion said they listened to less content due to the pandemic.

Would you say that you spend more, as many, or fewer hours per week watching **CANADIAN/QUÉBEC** audiovisual content since the beginning of the pandemic?

Base: All respondents (n=1 875)



The pandemic seems to have had less of an impact on the viewing of Canadian/Québec content. More than eight out of ten Canadians (81%) watch the same amount of this type of content. The greatest increase in the amount of time spent listening to Canadian/Québec content is in the province of Québec (16%).

IMPACT OF THE PANDEMIC ON AVERAGE VIEWING HOURS - CONT'D

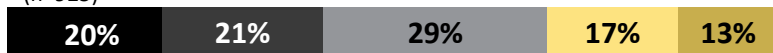
Would you say that you spend more, as many, or fewer hours per week watching audiovisual content since the beginning of the pandemic?

Base: All respondents (n=1,875)

Respondents who watched **more** hours (n=925)



11.2 more hours of watching on average



■ 5h or less ■ 5-6h ■ 7-10h ■ 11-20h ■ More than 20h

Respondents who watched **less** hours (n=94)



4.2 hours less of watching on average



■ 5h or less ■ 5-6h ■ 7-10h ■ 11-20h ■ More than 20h

Average increase of **10.2** hours of watching audiovisual content

Would you say that you spend more, as many, or fewer hours per week watching **CANADIAN/QUÉBEC** audiovisual content since the beginning of the pandemic?

Base: All respondents (n=1 875)

Respondents who watched **more** hours (n=190)



7,3 more hours of watching on average



■ 1h ■ 2h ■ 3h-4h ■ 5h-6h ■ 7h-10h ■ 11h-20h ■ More than 20h

Respondents who watched **less** hours (n=164)



4.3 hours less of watching on average



■ 1h ■ 2h ■ 3h-4h ■ 5h-6h ■ 7h-10h ■ 11h-20h ■ More than 20h

Average increase of **4.4** hours of Canadian/Québec audiovisual content watched.



LANGUAGES AND SCREENS PREFERRED BY CANADIANS

LANGUAGES AND SCREENS PREFERRED BY CANADIANS

PREFERRED SOURCES AND PLATFORMS FOR WATCHING CONTENT

Canadians watch audiovisual content primarily in English (86%) and French (20%). In Québec, the majority of respondents (76%) watch French-language content. This proportion is even higher for Canadian or Québec content (87%). Almost forty percent (39.5%) of Canadians' audiovisual content viewing time is via online platforms (Netflix, Crave, Apple TV, etc.).

Linear television accounts for 28.7% of viewing time followed by digital video recorders with 10.5% of the time. On-demand services (Illico, Bell, Fibe, etc.) account for 7.3% of Canadians' viewing time, while downloads via torrents account for only 4.4% of overall viewing time.

Linear television is preferred for watching Canadian or Québec content. Linear television accounts for 38.9% of viewing time, followed by online services with 27.3% of viewing time. Digital video recorders (14.9%) and on-demand services (10.7%) are used more frequently, proportionally speaking, for watching Canadian or Québec content than for other content.


PREFERRED SCREEN FOR WATCHING CONTENT

Television screens (TV 69%; Smart TV 40%) are preferred by Canadians for watching their audiovisual content. Seven in ten Canadians (70%) say this is their preferred screen, while one third consider it to be their second preferred screen. Respondents over the age of 55 are more likely to prefer television as their preferred screen for watching content.

Mobile screens (smart phones 40%, tablet 33%) are preferred by nearly six in ten respondents (59%). More than one in ten respondents (15%) say that mobile screens are the main way to watch content.

Young Canadians aged 13 to 17 are more likely to favour mobile screens (83%) while Canadians aged 55 and older are less likely to do so (39%). In fact, the older Canadians get, the less likely they are to favour this type of screen. Computers come next as the type of screen used for watching content (laptop 36%, desktop 21%). Younger Canadians are more likely to also favour this type of screen.

Respondents aged 55 and older are more likely to use only one type of screen to view audiovisual content than are younger people. The overwhelming majority of Canadians under the age of 34 use multiple screens to watch their audiovisual content.



LANGUAGES AND SCREENS PREFERRED BY CANADIANS

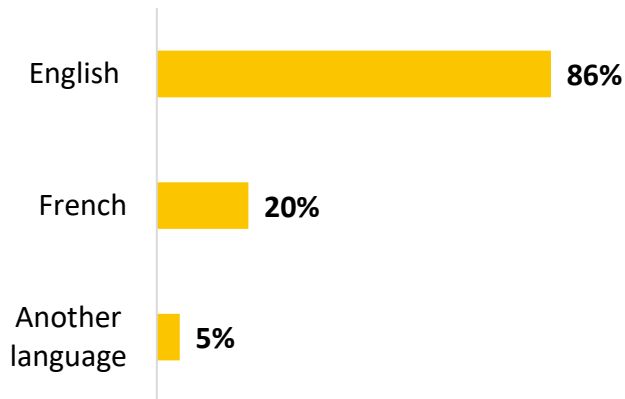
PREFERRED SCREEN FOR WATCHING CANADIAN OR QUÉBEC CONTENT

Canadian or Québec audiovisual content is mainly watched on television (78%). Television (49%) and smart TVs (29%) are the screens preferred by Canadians to watch Canadian or Québec audiovisual content. Other screens are much less used to watch this type of content. Mobile screens and computers are preferred by 10% and 12% of respondents respectively to watch Canadian or Québec content. The observable differences between generations in terms of the types of screens preferred are much less significant for Canadian or Québec content than they are for other types of audiovisual content.

PREFERRED LANGUAGES FOR WATCHING CONTENT

Generally, in which languages do you watch audiovisual content?*

Base: respondents who watch at least one hour of audiovisual content per week (n=1, 819)

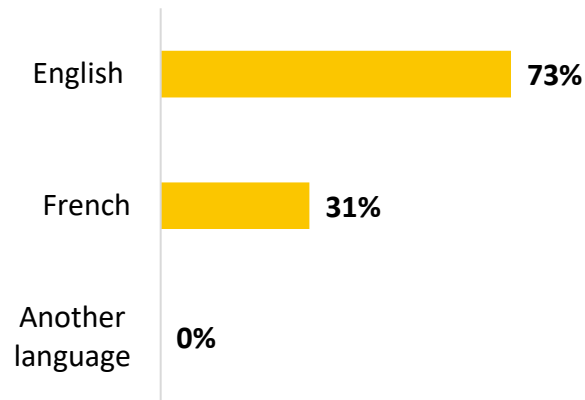


Without surprise, it is in Québec that we consume the most French-language content (76% vs. 20%).

It is noteworthy that among the respondents who listen to English content, we find a higher proportion among members of a racialized community (97%), among youth under 18 years of age (94%) and among respondents aged between 18 and 34 years old (92%).

Generally, in which languages do you watch **CANADIAN/QUÉBEC audiovisual content?***

Base: respondents who watch at least one hour of CANADIAN/QUÉBEC audiovisual content per week (n=1,252)



Nearly nine out of ten Quebecers (87%) listen to their Canadian/Québec content in French.

We note a significantly higher proportion of respondents who prefer English among members of racialized communities (93%).

*Since respondents could give more than one answer, the total may exceed 100%.

BREAK DOWN OF VIEWING TIME PER PLATFORM

Break down your average viewing time (in %) among the different sources or platforms you use.

Base: respondents who watch at least one hour of audiovisual content per week (n=1,819)

39.5%



Online services
(Netflix, Crave, Apple TV+)

28.7%



Linear TV channel

10.5%



Non-linear TV channel
via digital video recorder

7.3%



On-demand service
(Club illico, Bell Fibe TV)

4.4%



Downloading content via
"torrents"

Canadian/Québec Content

38.9%



Linear TV channel

27.3%



Online services
(Netflix, Crave, Apple TV+)

14.9%



Non-linear TV channel
via digital video recorder

10.7%



On-demand service
(Club illico, Bell Fibe TV)

3.1%



Downloading content via
"torrents"

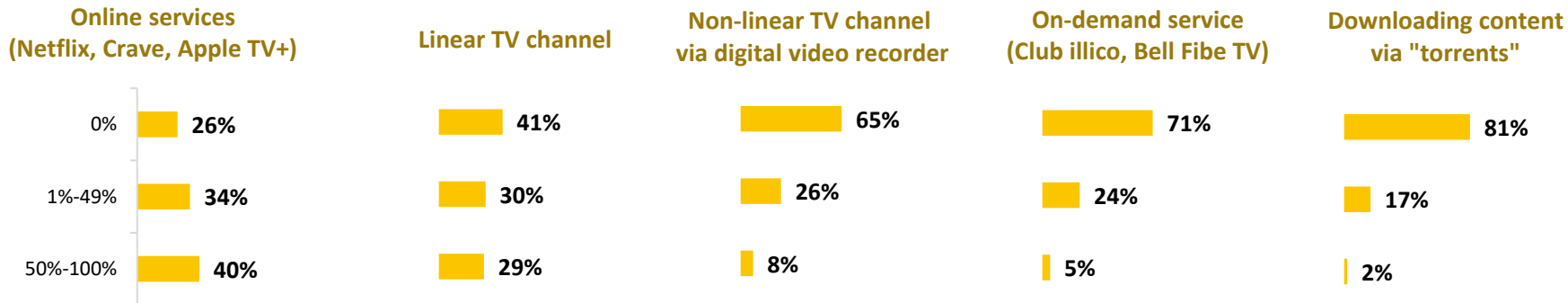


Among all Canadian provinces, online services are least popular in Québec (29.5% vs. 39.5%). Respondents aged 18 to 34 (62%) are the most frequent users of such platforms. In terms of linear TV channel and digital recorder, these platforms are most frequently used by Francophones (19.8%) and Canadians aged 55 and older (13.4%). For Canadian/Québec content specifically, over-the-air television is more often favoured than online services. Canadians aged 55 and older (54.7%) and Francophones (44.2%) spend significantly more time using this platform, while younger Canadians, especially those aged 18-34 (52.5%), use online services such as Netflix even more.

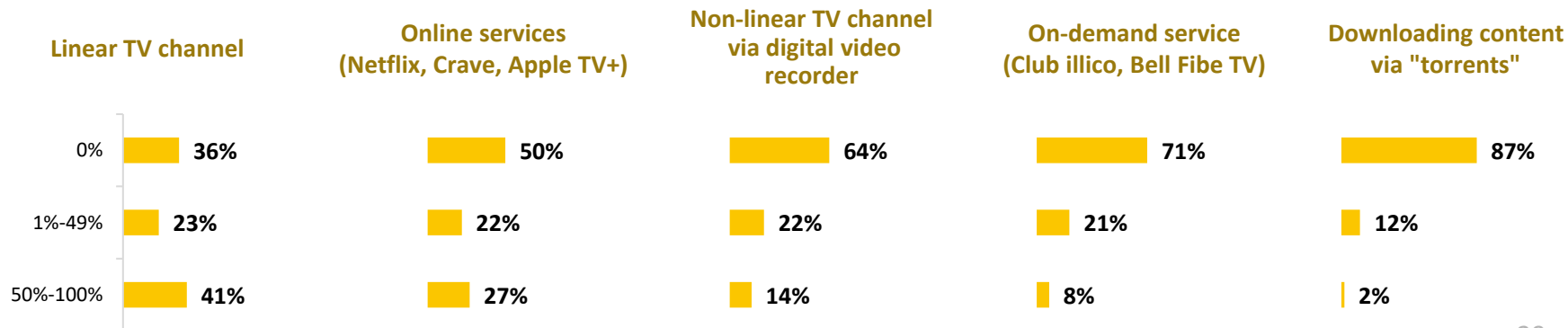
BREAK DOWN OF VIEWING TIME PER PLATFORM - CONT'D

Break down your average viewing time (in %) among the different sources or platforms you use.

Base: respondents who watch at least one hour of audiovisual content per week (n=1,819)



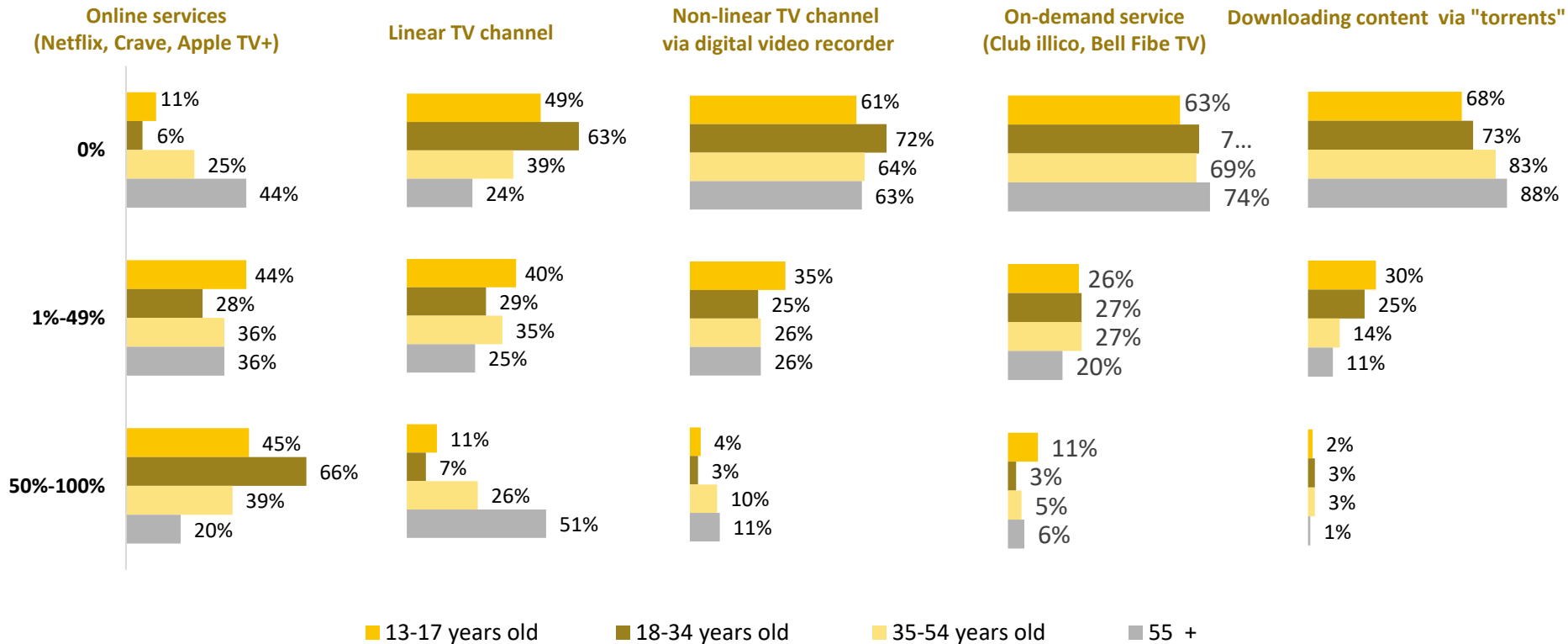
Canadian/Québec Content



BREAK DOWN OF VIEWING TIME PER PLATFORM– BY AGE

Break down your average viewing time (in %) among the different sources or platforms you use.

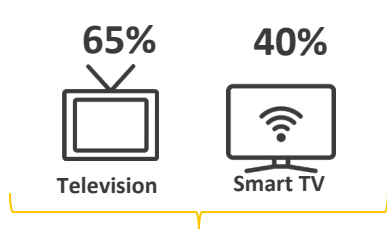
Base: respondents who watch at least one hour of audiovisual content per week (n=1,819)



PREFERRED SCREEN FOR WATCHING CONTENT

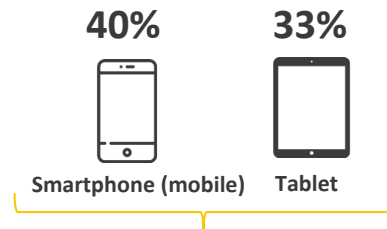
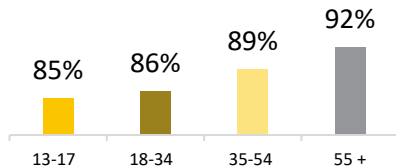
On what type of screen do you watch audiovisual content MOST OFTEN?

Base: respondents who watch at least one hour of audiovisual content per week (n=1,819)



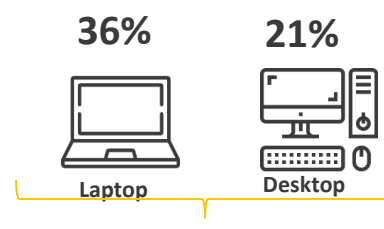
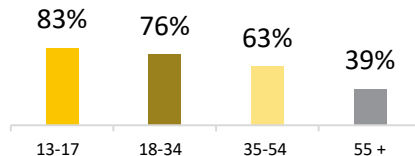
Total television: 89%

- First screen: 70%
- Second screen: 33%



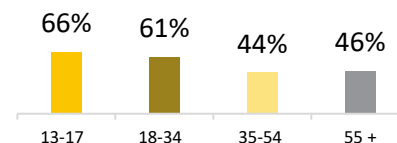
Total Mobile: 59%

- First screen: 15%
- Second screen: 48%



Total computer: 50%

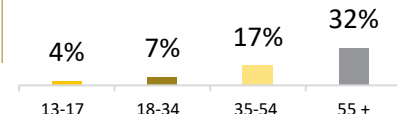
- First screen: 15%
- Second screen: 38%



19%



No other type of screen

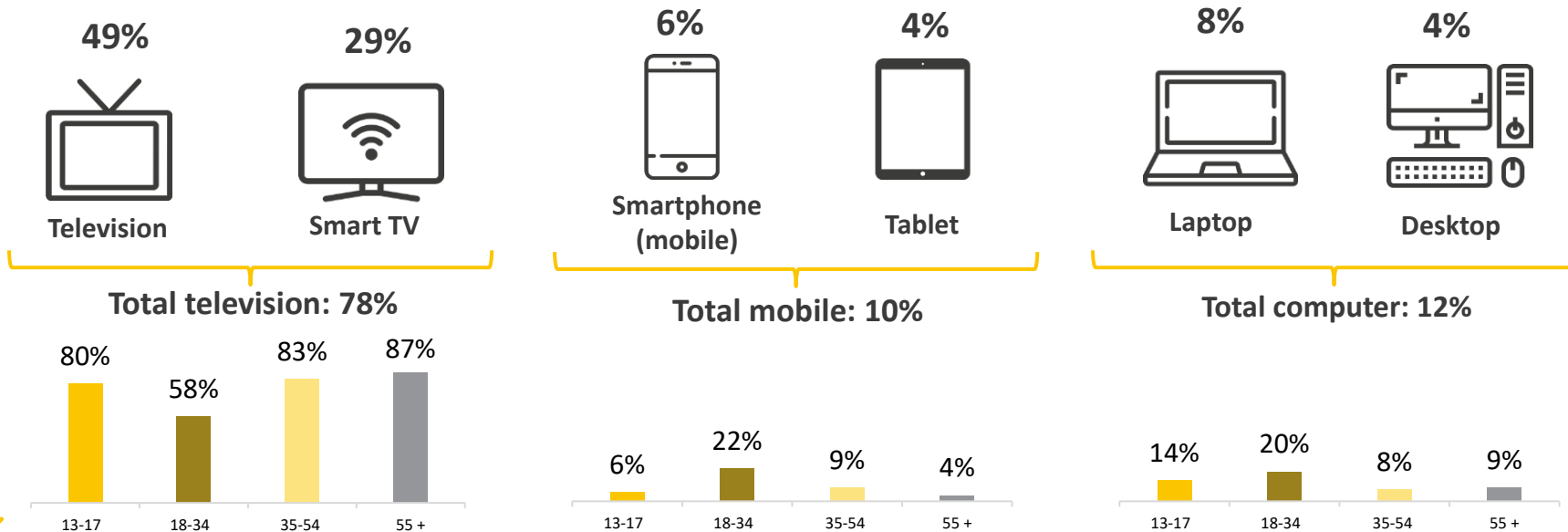


Television continues to be the preferred screen for Canadians to watch audiovisual content, especially among older Canadians. Younger Canadians, on the other hand, prefer mobile devices and computers. One in five Canadians prefer only one type of screen for watching audiovisual content. This trend is more pronounced among those 55 years of age and older.

PREFERRED SCREEN FOR WATCHING CANADIAN/QUÉBEC CONTENT

On what type of screen do you watch CANADIAN/QUÉBEC audiovisual content MOST OFTEN?

Base: respondents who watch at least one hour of CANADIAN/QUÉBEC audiovisual content per week (n=1,252)



Television is also the preferred screen for Canadians to watch Canadian/Québec audiovisual content, in a higher proportion than for other types of content (78%). This screen is particularly popular among the younger age group, while 18 to 34 years old Canadians (22%) are more likely to watch Canadian/Québec content on mobile devices.

A blurred background of a movie theater. The foreground shows the back of a red upholstered seat. In the background, other rows of red seats are visible, and a large, bright screen is illuminated at the front of the theater. The overall atmosphere is dimly lit, typical of a cinema.

FREQUENCY OF WATCHING AUDIOVISUAL CONTENT

FREQUENCY OF WATCHING AUDIOVISUAL CONTENT

TYPE OF CONTENT WATCHED

In terms of watching audiovisual content in general, Canadians often or sometimes watch series (89%), feature films (78%), YouTube videos (61%) and short films (53%). Web series (36%) and series on YouTube (30%) are much less popular. Canadian or Québec content is not as popular, regardless of the type of content watched. However, the same trends as for general content can be observed. Canadian or Québec series (55%), feature films (38%), short films (33%), YouTube videos (32%), web series (21%) and YouTube series (18%) are watched often or sometimes by respondents.

THE NUMBER OF CANADIAN OR QUÉBEC FILMS OR SERIES WATCHED IN THE PAST YEAR

Over the past year, Canadians watched an average of 3.1 series, 2.5 documentaries, 2.4 feature films, 2 short films, 0.8 animation, 0.5 youth films and 0.5 youth series of Canadian or Québec origin. It is series and feature films that attract the most Canadians. Both types of audiovisual content were watched at least once in the past year by more than half of Canadians. More than six in ten respondents (62%) watched at least one series and more than half (52%) watched at least one feature film of Canadian or Québec origin.

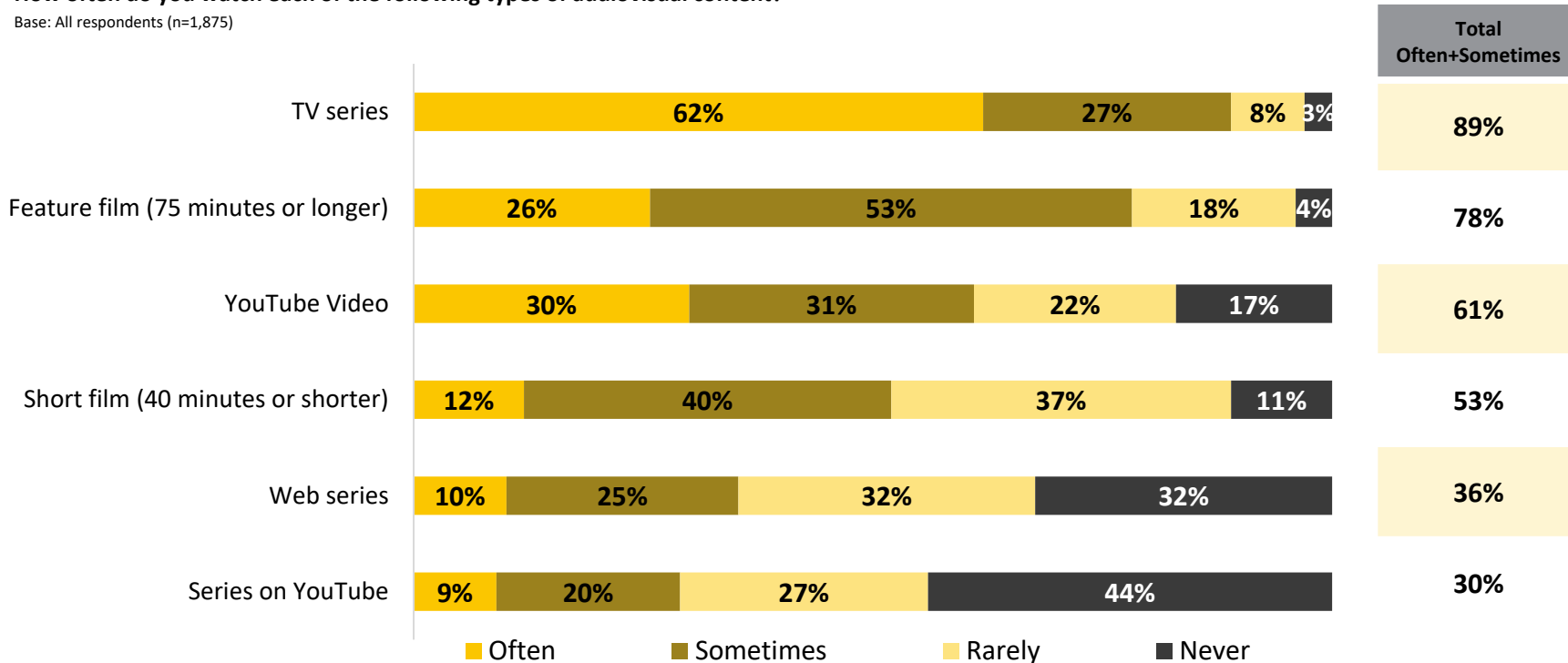
CINEMA ATTENDANCE

Four in ten Canadians (41%) often or sometimes go to movie theatres to watch movies (pre-pandemic). About six in ten Canadians (59%) say they rarely or never go to the movies to watch movies. Younger Canadians are more likely to go to the movies than older Canadians. Canadians aged 13–17-year-olds are most likely to go (60%) followed by 18-34 year olds (52%). Canadians go to theatres less often to watch Canadian or Québec content. Eight in ten Canadians (81%) say they rarely or never go to a movie theatre to watch this type of content. One in five Canadians (19%) do so often or sometimes. Quebecers (28%) and youth aged 18-34 (25%) are more likely than other Canadians to do so.

WATCHING FREQUENCY BY CONTENT TYPE

How often do you watch each of the following types of audiovisual content?

Base: All respondents (n=1,875)

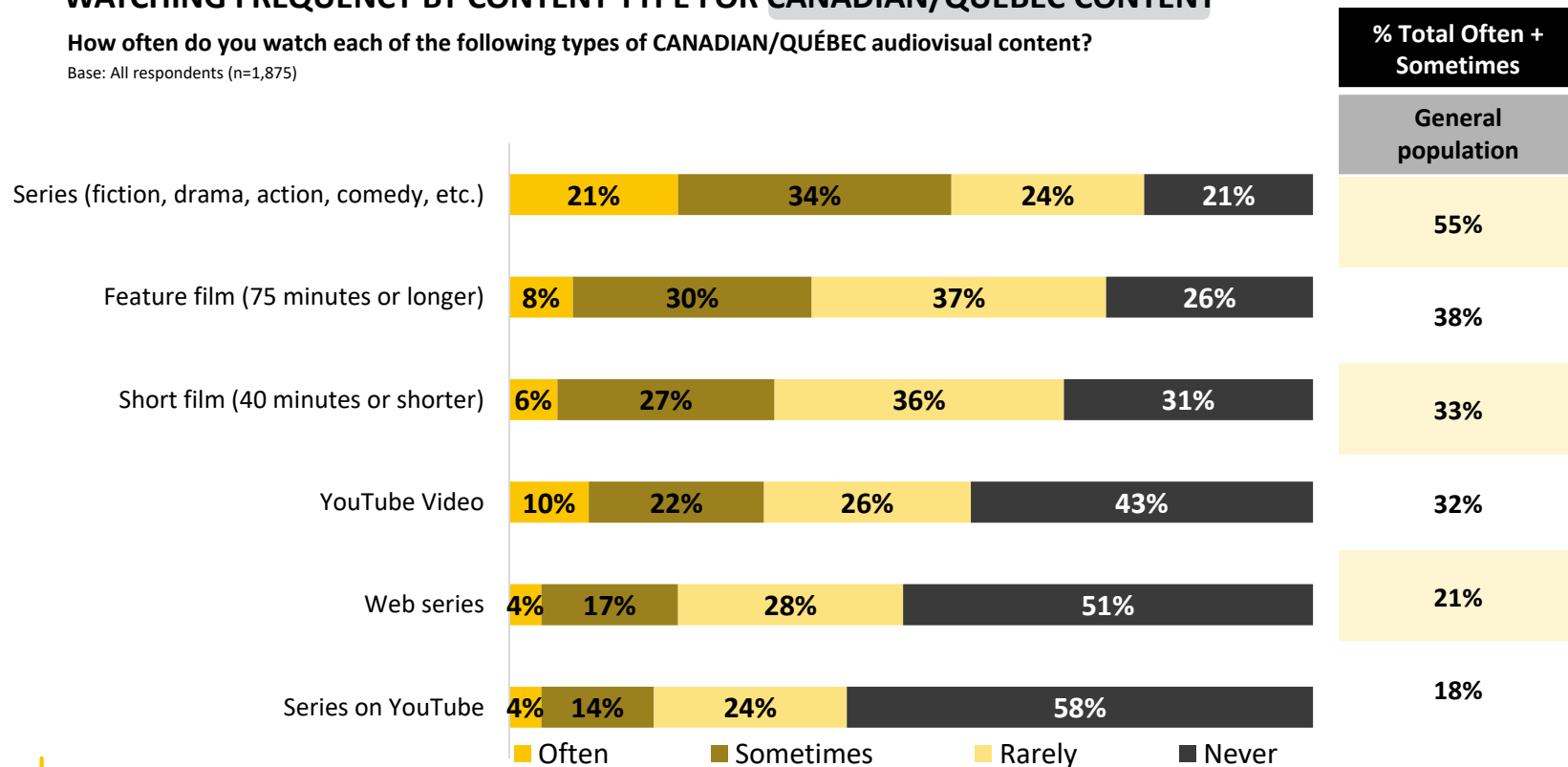


TV series and feature films are the two types of content most frequently listened to by Canadians.

WATCHING FREQUENCY BY CONTENT TYPE FOR CANADIAN/QUÉBEC CONTENT

How often do you watch each of the following types of CANADIAN/QUÉBEC audiovisual content?

Base: All respondents (n=1,875)

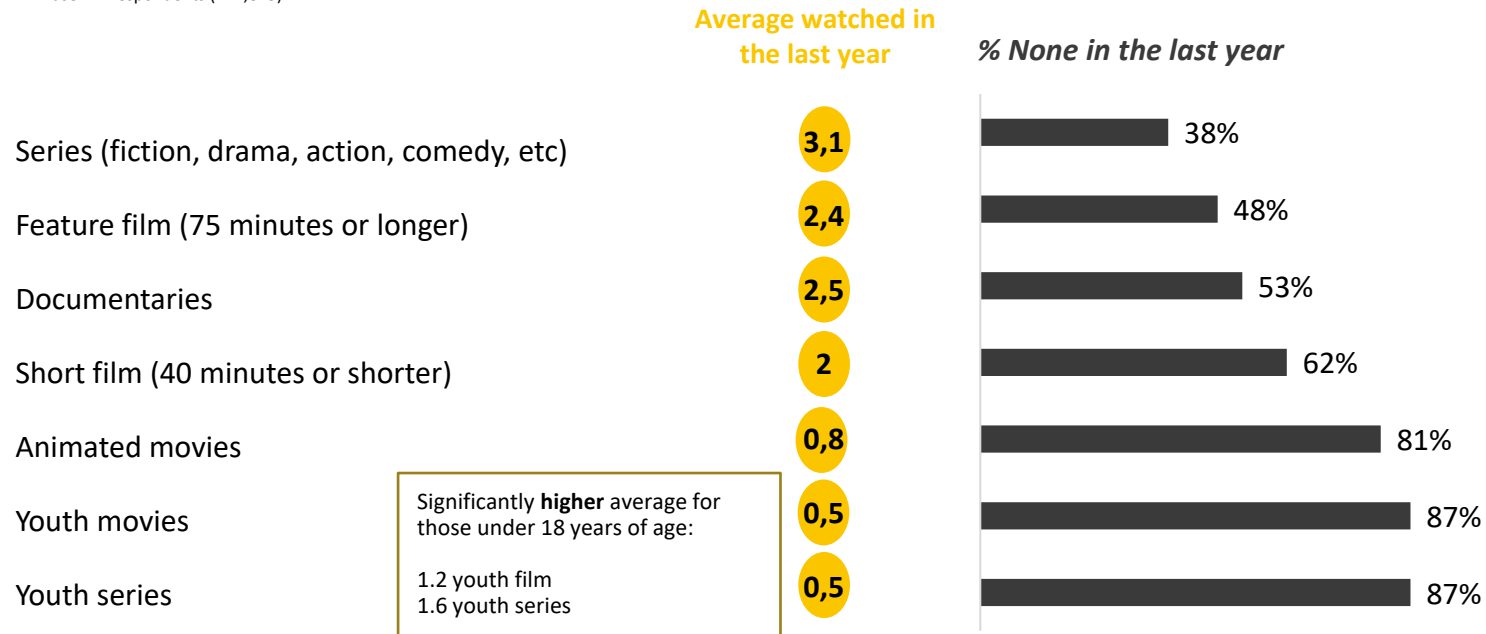


Series are the most frequently watched Canadian/Québec content by Canadians. Unlike audiovisual content in general, Canadian feature films are less frequently viewed by Canadians. For almost all types of content, Canadians who are familiar with Telefilm Canada are significantly more likely to say they watch it often or sometimes. This is particularly the case for series (62%), feature films (43%), short films (40%), and Web series (24%).

NUMBER OF CANADIAN/QUÉBEC FILMS/SERIES WATCHED

APPROXIMATELY how many Canadian/Québec movies and series have you seen in the past year?

Base: All respondents (n=1,875)

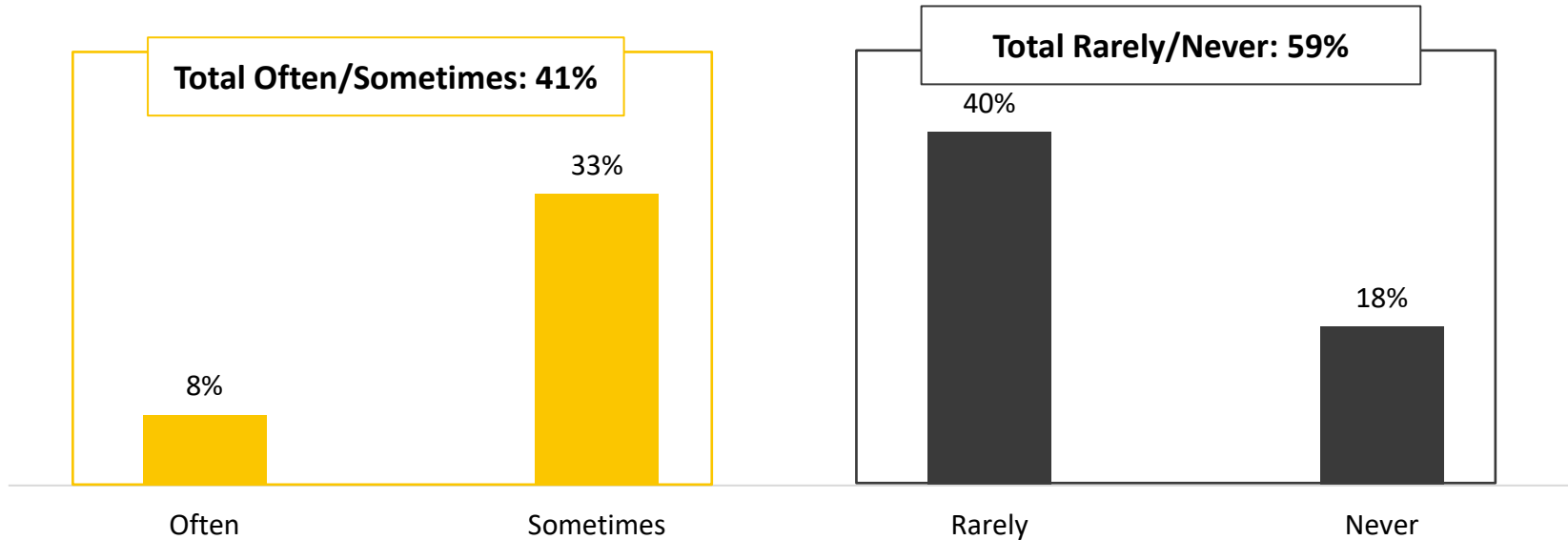


Series are once again the most popular type of content consumed by Canadians, who watch an average of 3.1 series per year. With respect to other types of content, a significant proportion report that they did not listen to any during the year. This proportion is significantly higher among Anglophones. More Anglophones have not listened to any series (43%), feature films (55%), documentaries (56%) and short films (65%).

FREQUENCY OF WATCHING MOVIES AT THE MOVIE THEATER

How often do you go to movie theatres to see a film (please refer to your habits before the COVID-19 crisis)?

Base: All respondents (n=1,875)



Among Canadians who go to the movies often or sometimes, there is a higher proportion of youth under the age of 18 (60%) and Canadians between the ages of 18 and 34 (52%).

FREQUENCY OF WATCHING MOVIES AT THE MOVIE THEATER - *DETAILS*

How often do you go to movie theatres to see a film (please refer to your habits before the COVID-19 crisis)?

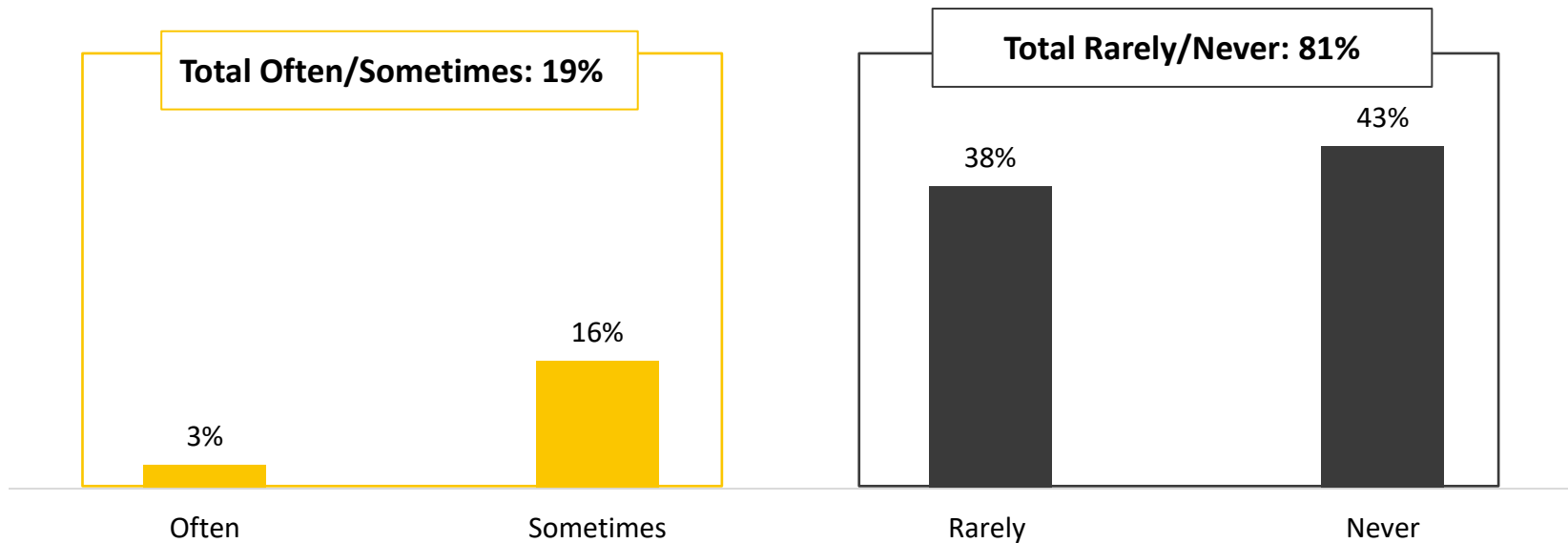
Base: All respondents

	Total	Province						Gender		Age				Language		
		ATL	QC	ON	MB/SK	AB	CB	Male	Female	13-17	18-34	35-54	55+	French	English	Other
	n= 1 875	137	433	712	135	215	243	919	944	98	466	632	679	410	1 226	238
Total Often/Sometimes	41%	31%	35%	46%	41%	40%	43%	43%	39%	60%	52%	40%	31%	37%	42%	47%
Often	8%	6%	7%	7%	9%	7%	16%	10%	6%	13%	12%	7%	5%	7%	8%	11%
Sometimes	33%	25%	28%	39%	33%	34%	28%	33%	33%	48%	40%	33%	25%	29%	34%	36%
Total Rarely/Never	59%	69%	65%	54%	59%	60%	57%	57%	61%	40%	48%	60%	69%	63%	58%	53%
Rarely	40%	45%	41%	38%	41%	44%	42%	39%	42%	35%	39%	41%	42%	42%	40%	41%
Never	18%	23%	24%	16%	17%	16%	15%	18%	19%	5%	9%	19%	27%	22%	18%	12%

FREQUENCY OF WATCHING CANADIAN/QUÉBEC MOVIES AT THE MOVIE THEATER

How often do you go to movie theatres to see a CANADIAN/QUÉBEC film (please refer to your habits before the COVID-19 crisis)?

Base: All respondents (n=1,875)



Only one in five Canadians go to the movies often or sometimes to see Canadian/Québec content. This proportion is higher in the province of Québec (28%), Francophones (28%) and among 18-34-year-olds (25%).

FREQUENCY OF WATCHING CANADIAN/QUÉBEC MOVIES AT THE MOVIE THEATER - DETAILS

How often do you go to movie theatres to see a CANADIAN/QUÉBEC film (please refer to your habits before the COVID-19 crisis)?

Base: All respondents

	Total	Province						Gender		Age				Language		
		ATL	QC	ON	MB/SK	AB	CB	Male	Female	13-17	18-34	35-54	55+	French	English	Other
	n= 1 875	137	433	712	135	215	243	919	944	98	466	632	679	410	1 226	238
Total Often/Sometimes	19%	13%	28%	18%	13%	13%	16%	19%	19%	25%	25%	17%	15%	28%	16%	19%
Often	3%	2%	5%	2%	2%	3%	2%	4%	2%	6%	6%	2%	1%	5%	3%	2%
Sometimes	16%	11%	23%	16%	11%	10%	13%	15%	17%	19%	19%	15%	14%	24%	13%	17%
Total Rarely/Never	81%	87%	72%	82%	87%	87%	84%	81%	81%	75%	75%	83%	85%	72%	84%	81%
Rarely	38%	29%	42%	38%	37%	40%	37%	40%	36%	37%	40%	39%	37%	43%	36%	46%
Never	43%	58%	30%	44%	50%	47%	47%	41%	45%	38%	35%	45%	48%	29%	48%	35%



CRITERIA FOR THE SELECTION OF AUDIOVISUAL CONTENT

CRITERIA FOR THE SELECTION OF AUDIOVISUAL CONTENT

PREFERRED TYPE OF CONTENT

Comedy (25%), drama (19%), action (11%), documentary (11%), suspense (8%) and science fiction (8%) are the most popular audio-visual genres for Canadians.

CRITERIA FOR CHOOSING AUDIOVISUAL CONTENT

When choosing audiovisual content, Canadians will pay particular attention to three elements: the story being told (76%), the genre (65%) and the actors (40%). It is these aspects that will be the most important in the audiovisual choices Canadians make. Recommendations from family and friends (29%) and trailers round out the top 5 most important selection criteria. Screenwriting (32%), awards won at festivals and galas (24%) and promotional campaigns by actors, directors and producers (24%) are the least important elements in Canadians' choices. The elements of importance in the choice of Canadian or Quebec audiovisual content are the same as for general content: storytelling (73%), genre (60%) and actors and actresses (41%) are the three most important criteria.

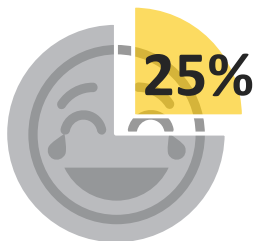
SELECTION CRITERIA FOR CANADIAN AND QUEBEC CONTENT (CONTINUED)

The importance criteria mentioned above are the same criteria that guided the choice of the latest Canadian or Quebec audiovisual content viewed by respondents. These are the criteria that influenced the viewing of series such as: Schitt's Creek, Murdoch Mysteries, La Faille, District 31, Corner Gas, Mon fils and Heartland.

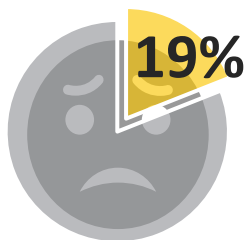
PREFERRED KIND OF CONTENT

What kind of audiovisual content do you prefer to watch?

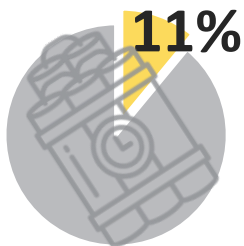
Base: All respondents (n=1,875)



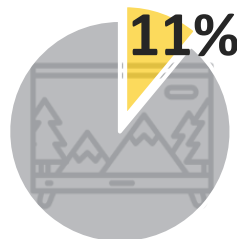
Comedy



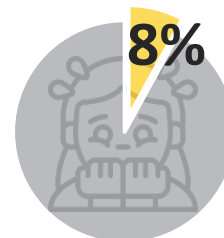
Drama



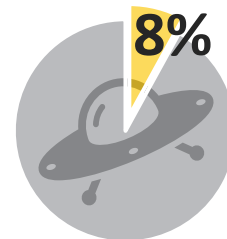
Action



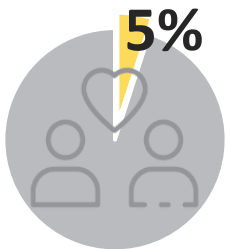
Documentary



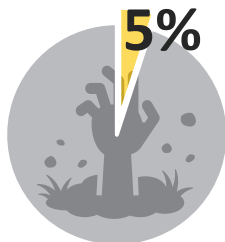
Suspense



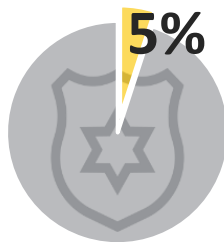
Science fiction



Romantic



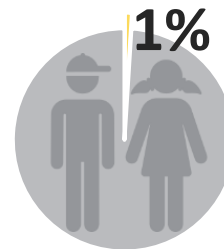
Horror



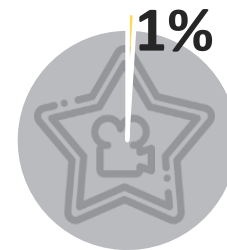
Police drama



Animation



Youth

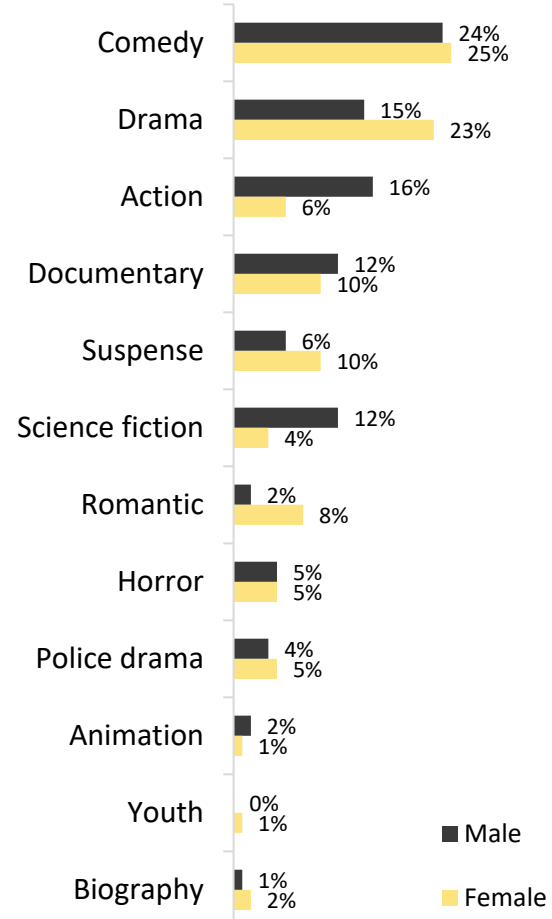
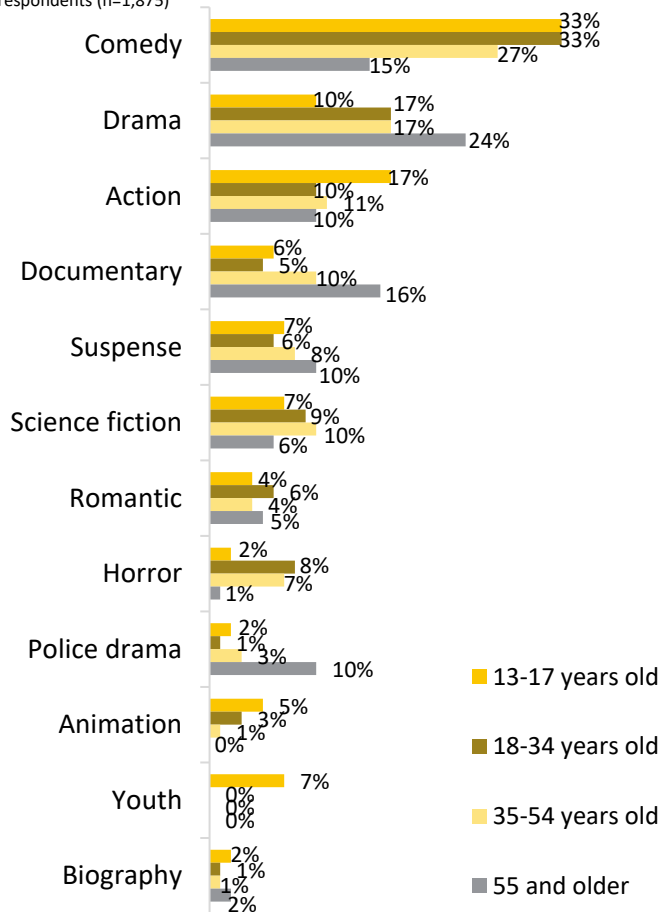


Biography

PREFERRED KIND OF CONTENT– *By age and gender*

What kind of audiovisual content do you prefer to watch?

Base: All respondents (n=1,875)



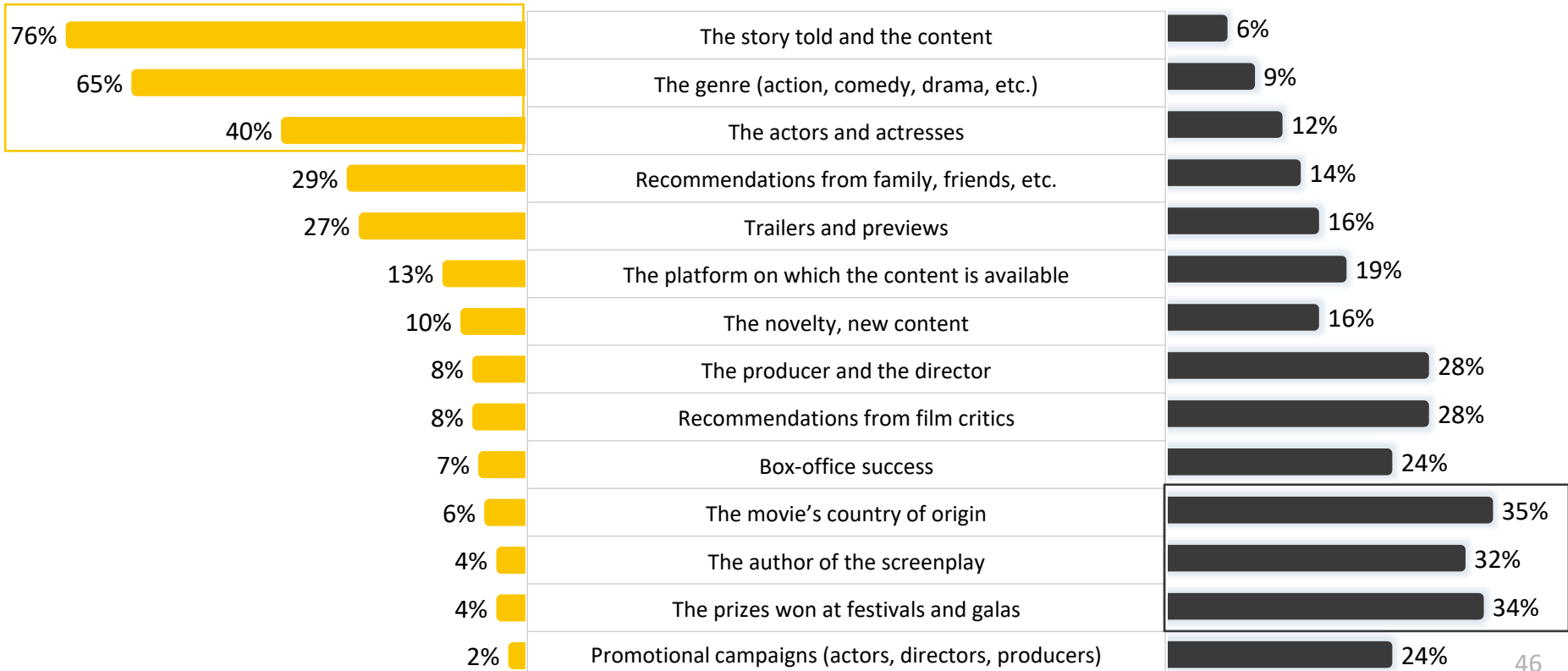
SELECTION CRITERIA FOR CHOICE OF AUDIOVISUAL CONTENT

What are the three most important and three least important criteria for making your choice and convincing you to watch this content?

Base: All respondents (n=1 875)

Most important

Least important

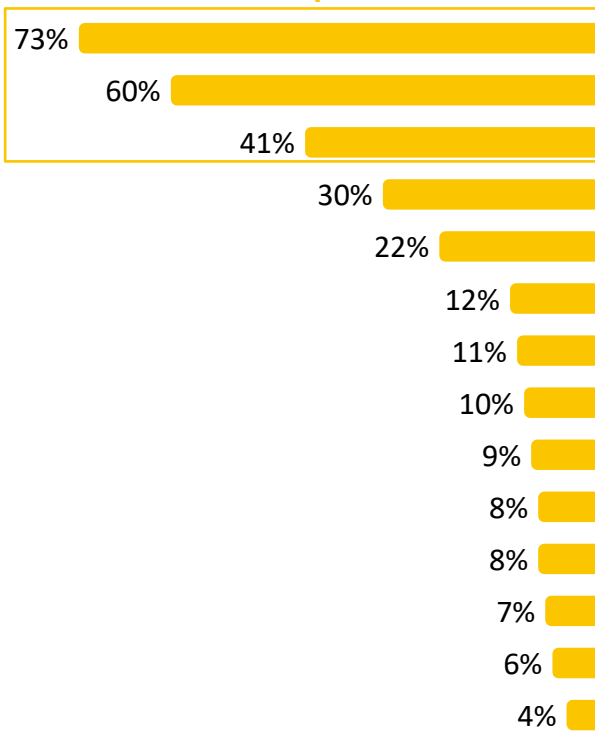


SELECTION CRITERIA FOR CHOICE OF CANADIAN/QUÉBEC AUDIOVISUAL CONTENT

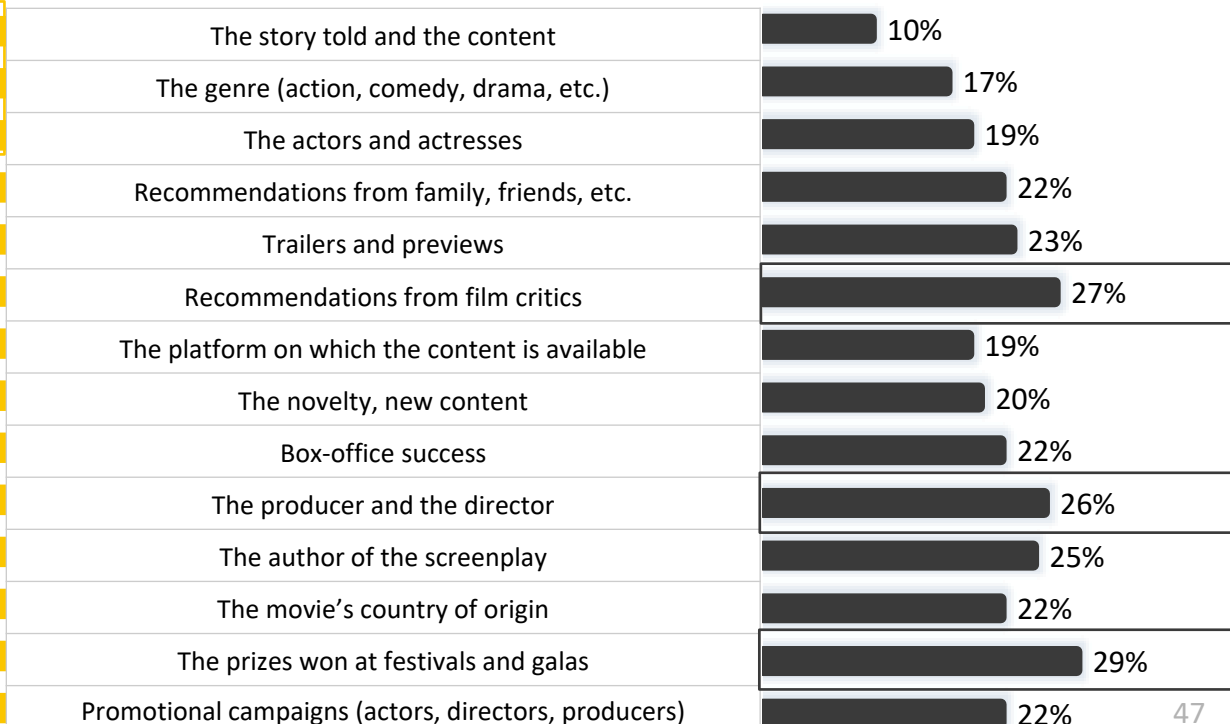
What are the three most important and three least important criteria for making your choice and convincing you to watch this CANADIAN/QUÉBEC content?

Base: All respondents (n=1,875)

Most important



Least important



SELECTION CRITERIA OF THE LAST CANADIAN/QUÉBEC CONTENT WATCHED

Thinking about the latest Canadian audiovisual content you saw, what was the main reason you decided to watch it?*

Base: respondents who have watched at least one Canadian/Québec title (n=1,431)



*Since respondents could give more than one answer, the total may exceed 100%.

A person is seen from behind, sitting in a dimly lit room and watching a television. The TV screen shows a blurred image of a person in a blue and orange uniform, possibly a soccer player. The person's hand is holding a remote control, and they are pointing it towards the TV. A semi-transparent grey banner is overlaid across the middle of the image, containing the text.

PERCEPTION OF CANADIAN/QUÉBEC, AMERICAN AND FOREIGN CONTENT

PERCEPTION OF CANADIAN/QUÉBEC, AMERICAN AND FOREIGN CONTENT

THE PERCEPTION OF CANADIAN, AMERICAN AND FOREIGN AUDIOVISUAL CONTENT

Different perceptions are associated with audiovisual content depending on the country of origin of the production. Audiovisual content is mainly perceived as being entertaining (34%), offering content that resonates with them (23%) and featuring diverse characters (20%). Canadian or Quebec content is less perceived as avant-garde (8%), capable of reaching a vast audience (6%) or connecting with different cultures (10%). American audiovisual content is perceived as entertaining (50%), of high quality (41%) and capable of reaching a vast audience (35%). It is less associated with educational content (9%), content that resembles me (7%) or content that connects with other cultures (10%). Respondents consider that foreign audiovisual content provides a better understanding of the world (30%), connects with other cultures (29%), features diverse characters (22%) and is entertaining (22%).

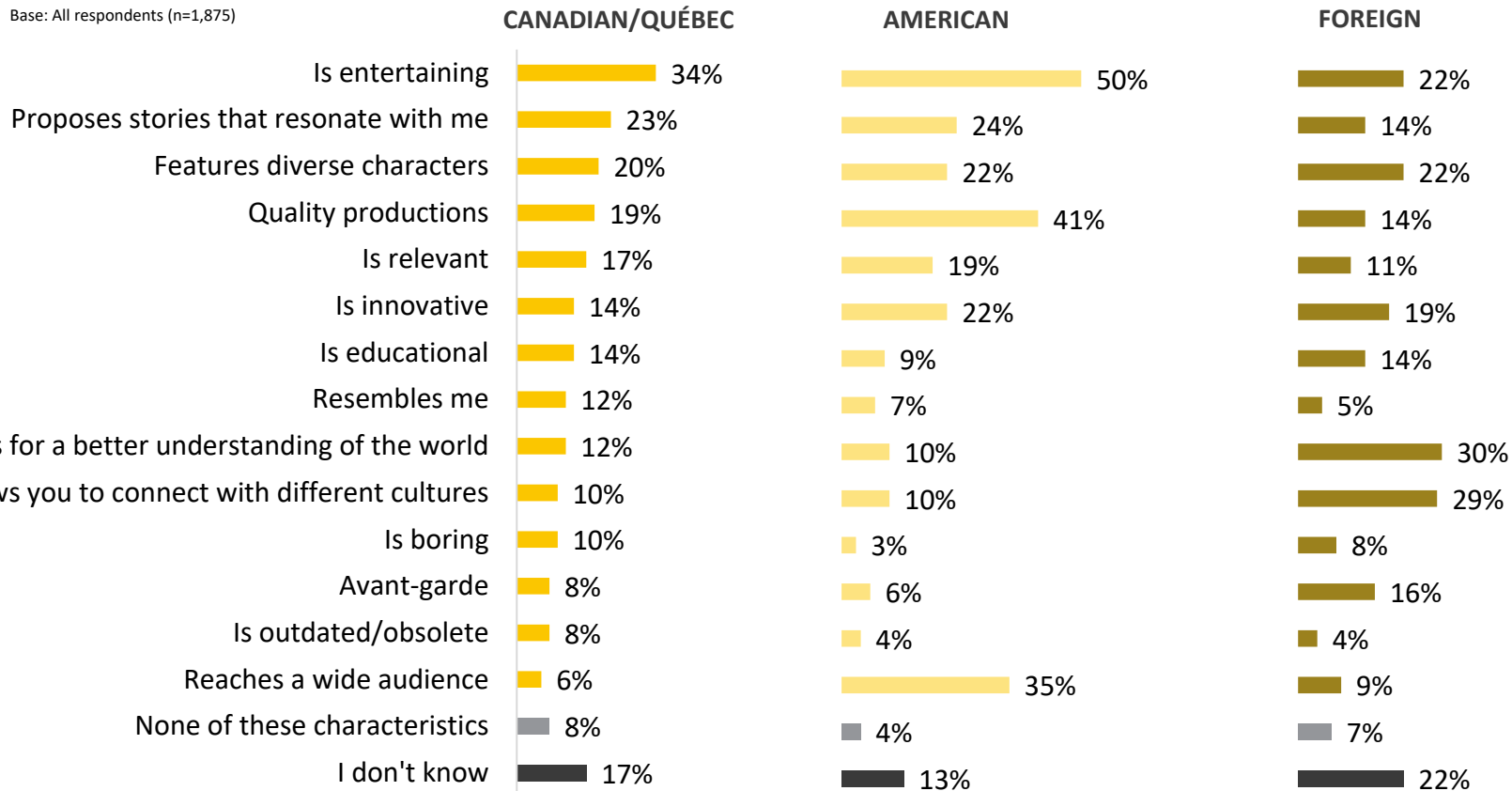
THE PERCEPTUAL UNIVERSE ACCORDING TO THE ORIGIN OF THE CONTENT

Correspondence analysis provides another reading of the perceptual universe of audiovisual content from different origins. The perceptual universe of Canadians is structured along two axes: the reach of the content and its ability to reach a broad audience, and the proximity between the content and the audience (the content looks like me). Canadian content is associated with content that resembles the Canadian audience, but content is also associated with content that is more boring or outdated. U.S. content is associated with quality productions that can reach a wide audience. Finally, foreign content is associated with avant-garde content, which provides an understanding of the world and connects to different cultures.

CHARACTERISTICS ASSOCIATED WITH CONTENT FROM DIFFERENT ORIGINS

Please indicate which characteristics you generally associated with CANADIAN/QUÉBEC, AMERICAN and FOREIGN audiovisual content (other than Canada and the United States).

Base: All respondents (n=1,875)

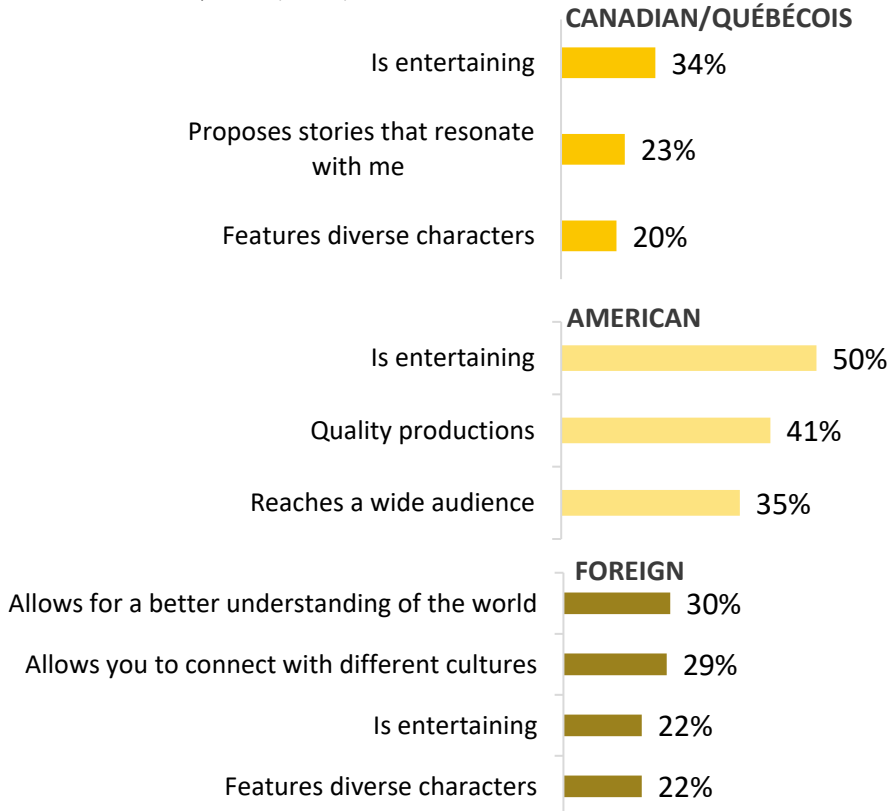


*Since respondents could give more than one answer, the total may exceed 100%.

CHARACTERISTICS ASSOCIATED WITH CONTENT FROM DIFFERENT ORIGINS

Please indicate which characteristics you generally associated with CANADIAN/QUÉBEC, AMERICAN and FOREIGN audiovisual content (other than Canada and the United States).

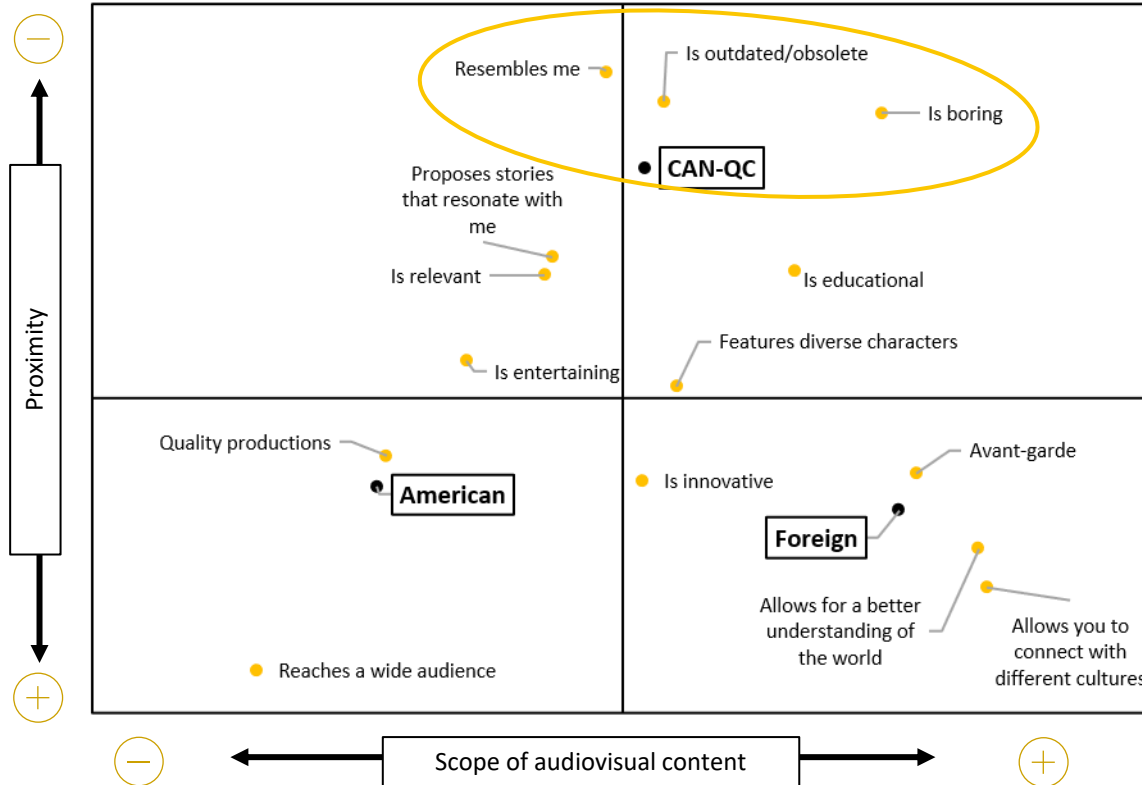
Base: All respondents (n=1,875)



In terms of the top three characteristics most often associated with Canadian/Québec audiovisual content, we note a significantly higher proportion of Quebecers who find the content entertaining (48%), that it proposes stories that resonate with them (45%) and that features diverse characters (26%).

*Since respondents could give more than one answer, the total may exceed 100%.

CANADIANS PERCEPTION OF CONTENT FROM DIFFERENT ORIGINS



Among the general population, Canadian content is perceived to be less far-reaching than other types of content. It is also more associated with outdated content but offers stories that appeal to and resemble the audience.

American content is strongly associated with quality productions and is seen as content that reaches a wide audience.

Foreign content offers a window to the world for Canadians but has the least reach.



LEVELS OF AGREEMENT ON CANADIAN/QUÉBEC CONTENT

LEVELS OF AGREEMENT ON CANADIAN/QUÉBEC CONTENT

FUNDING AND PROMOTION OF CANADIAN/QUÉBEC CONTENT

A majority of Canadians (73%) believe that more should be done to promote Canadian and Quebec audiovisual content in Canada and the same proportion of respondents also believe that more should be done to promote our content abroad. More than two out of three respondents (68%) agree that Canadian and Québec content is not promoted enough. As such, more than half of Canadians (57%) agree that governments should allocate more funding to help promote our content.

ACCESSIBILITY AND EASE OF FINDING CONTENT

Particular attention should be paid to the accessibility of Canadian and Quebec content. More than three in ten Canadians (31%) do not believe it is easy to access Canadian and Quebec content. Nearly four in ten Canadians (37%) do not believe it is easy to find Canadian and Quebec audiovisual content. Canadians who are most likely to have difficulty finding Canadian and Quebec content include residents of Ontario, Alberta and British Columbia, youth aged 18-34, and Canadians from racialized communities.

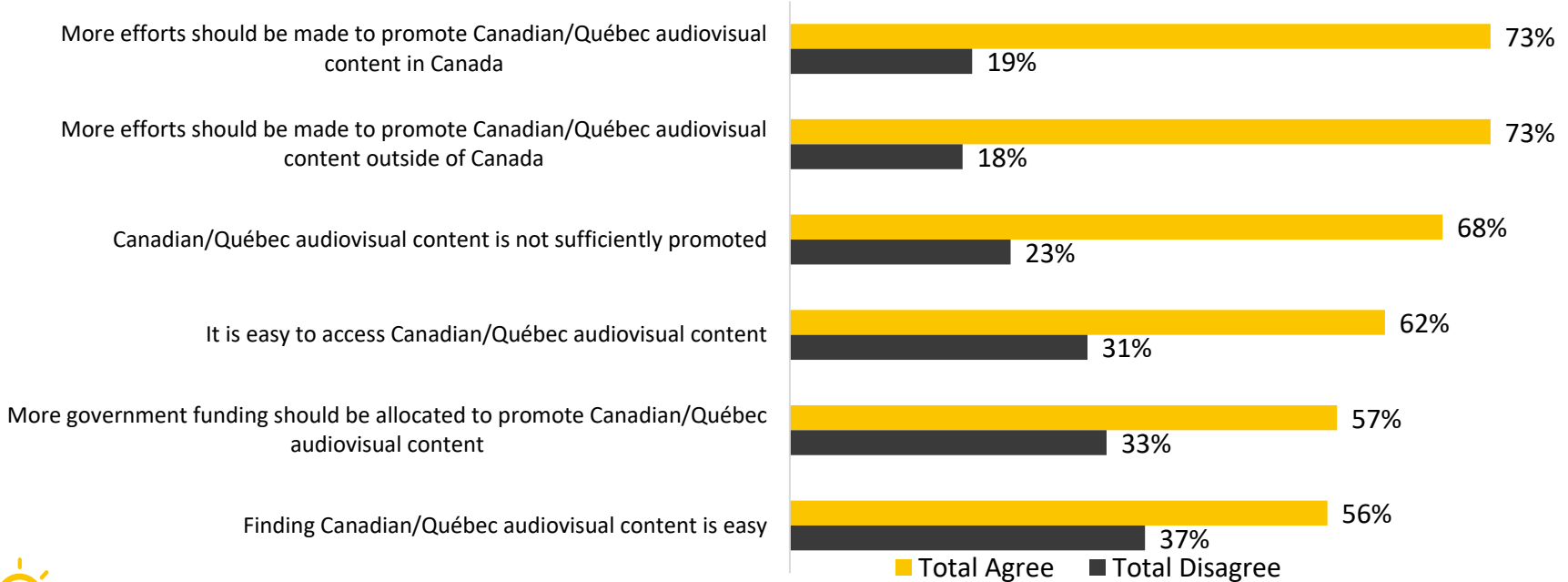
THE REPRESENTATIVENESS OF MINORITY GROUPS

Although many efforts are being made to improve the representativeness of minority groups in Canadian and Quebec audiovisual content, according to respondents from the general population and racialized communities, there is still work that has to be done. Half of Canadians in the general population (49%) believe that minority groups should be given more space in Canadian audiovisual productions. This proportion rises to 60% among members of racialized communities. They are also less likely than people in the general population to believe that Canadian and Québec content are made for people like them (40% vs. 47%). They are more likely to believe that there is not enough diversity in our content (45% vs. 38%). And they are more likely to feel that they are not represented in Canadian content, unlike respondents in the general population (45% vs. 34%).

LEVEL OF AGREEMENT ON THE ACCESSIBILITY OF CANADIAN/QUÉBEC CONTENT

What is your level of agreement or disagreement with the following statements?

Base: All respondents (n=1,875)



Almost three quarters of Canadians agree that there should be more effort to promote Canadian/Québec audiovisual content in Canada and abroad. These proportions are higher among respondents from the province of Québec. In fact, 79% of Quebecers believe that additional efforts should be made to promote content in Canada, 81% outside Canada. In addition, Quebecers are also more likely to think that Canadian/Québec content should receive more government funding (68% vs. 57%).

LEVEL OF AGREEMENT ON THE ACCESSIBILITY OF CANADIAN/QUÉBEC CONTENT - Details

What is your level of agreement or disagreement with the following statements?

Base: All respondents

	Total	Province						Gender		Age				Language		
		ATL	QC	ON	MB/SK	AB	BC	Men	Women	13-17	18-34	35-54	55+	French	English	Other
<i>% Agree presented</i>	n= 1 875	137	433	712	135	215	243	919	944	98	466	632	679	410	1 226	238
More efforts should be made to promote Canadian/Québec audiovisual content in Canada	73%	70%	79%	75%	64%	65%	68%	68%	77%	70%	74%	72%	73%	77%	71%	74%
More efforts should be made to promote Canadian/Québec audiovisual content outside of Canada	73%	72%	81%	74%	67%	64%	66%	69%	76%	74%	75%	71%	73%	80%	70%	78%
Canadian/Québec audiovisual content is not sufficiently promoted	68%	60%	70%	69%	65%	62%	68%	64%	71%	70%	72%	63%	68%	68%	67%	73%
It is easy to access Canadian/Québec audiovisual content	62%	54%	77%	60%	55%	54%	53%	62%	62%	60%	57%	64%	63%	78%	58%	54%
More government funding should be allocated to promote Canadian/Québec audiovisual content	57%	53%	68%	58%	49%	47%	46%	53%	60%	63%	59%	57%	53%	65%	55%	54%
Finding Canadian/Québec audiovisual content is easy	56%	47%	77%	53%	49%	46%	48%	56%	57%	61%	48%	61%	57%	76%	52%	46%

DIFFICULTY FINDING CANADIAN/QUEBEC CONTENT

Finding Canadian/Québec audiovisual content is easy | It is easy to access Canadian/Québec audiovisual content

% Total Disagree significantly higher

Who are the Canadians who find it difficult to find/access content from here?

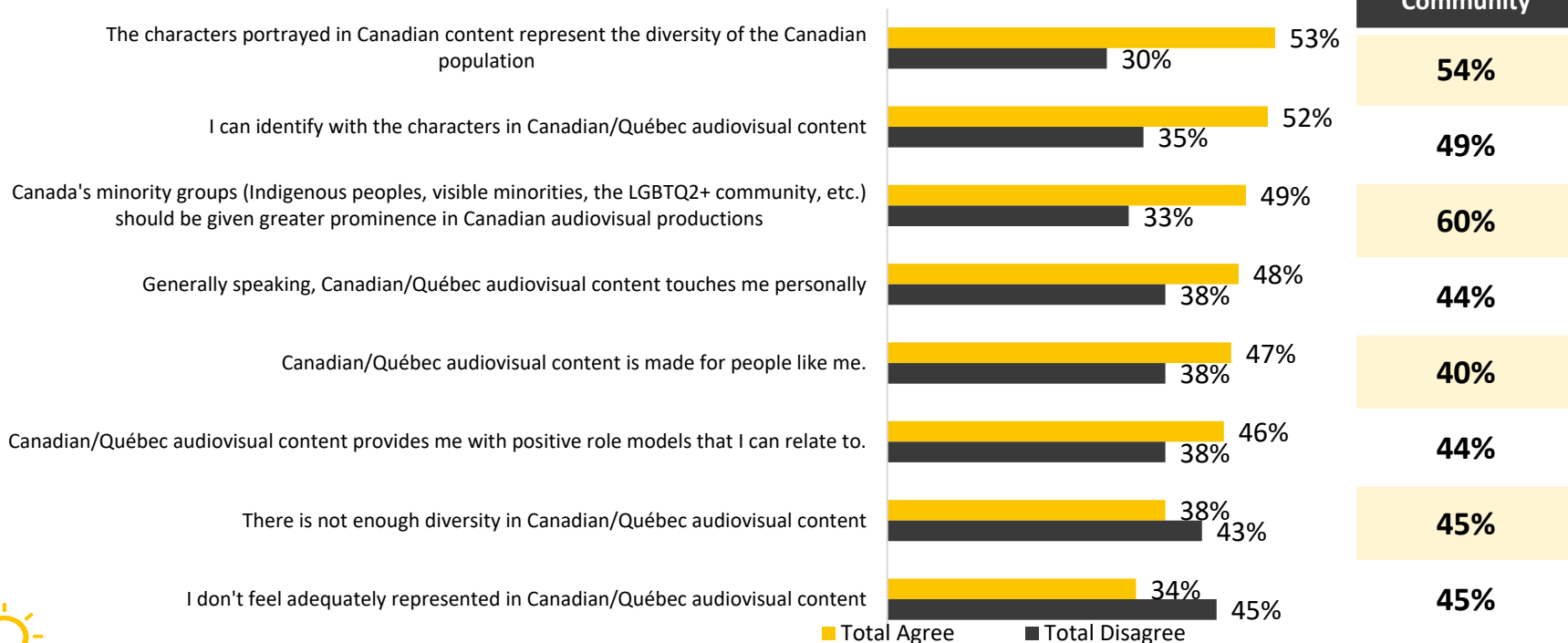


Province	Alberta, British Columbia, Ontario
Age	18-34 years old
Language	English, Other
Ethnic origin	Part of a racialized community

LEVEL OF AGREEMENT ON THE REPRESENTATIVENESS OF CANADIAN/QUÉBEC CONTENT

Please indicate your level of agreement or disagreement with each of the following statements

Base: All respondents (n=1 875)



Canadians from racialized communities are significantly more likely to think that Canada's minority groups should have more prominence in Canadian/Québec content (60%), that there is not enough diversity in Canadian/Québec content (45%) and that they do not feel adequately represented on screen (45%). They are also significantly less likely to find that Canadian/Québec content is made for people like them (40%).

*The complement to 100% corresponds to the mention: Don't know.

LEVEL OF AGREEMENT ON THE REPRESENTATIVENESS OF CANADIAN/QUÉBEC CONTENT - Details

Please indicate your level of agreement or disagreement with each of the following statements

Base: All respondents

	Total	Province						Gender		Age				Language		
		ATL	QC	ON	MB/SK	AB	BC	Men	Women	13-17	18-34	35-54	55+	French	English	Other
<i>% Agree presented</i>	n= 1 875	137	433	712	135	215	243	919	944	98	466	632	679	410	1 226	238
The characters portrayed in Canadian content represent the diversity of the Canadian population	53%	57%	56%	54%	45%	44%	54%	56%	49%	57%	49%	55%	52%	55%	53%	47%
I can identify with the characters in Canadian/Québec audiovisual content	52%	51%	64%	52%	35%	43%	47%	53%	51%	48%	54%	55%	49%	66%	48%	48%
Canada's minority groups (Indigenous peoples, visible minorities, the LGBTQ+ community, etc.) should be given greater prominence in Canadian audiovisual productions	49%	40%	63%	50%	37%	36%	42%	46%	51%	47%	57%	48%	45%	61%	45%	52%
Generally speaking, Canadian/Québec audiovisual content touches me personally	48%	47%	64%	49%	28%	33%	39%	49%	47%	50%	45%	51%	46%	66%	42%	46%
Canadian/Québec audiovisual content is made for people like me.	47%	43%	65%	47%	33%	37%	37%	47%	48%	48%	43%	52%	46%	67%	43%	39%
Canadian/Québec audiovisual content provides me with positive role models that I can relate to.	46%	48%	58%	43%	42%	37%	38%	44%	47%	53%	48%	50%	39%	60%	41%	45%
There is not enough diversity in Canadian/Québec audiovisual content	38%	36%	51%	36%	31%	34%	32%	40%	37%	39%	42%	37%	37%	48%	35%	41%
I don't feel adequately represented in Canadian/Québec audiovisual content	34%	26%	42%	33%	29%	36%	31%	39%	30%	37%	37%	34%	32%	42%	31%	39%

TEAM


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