



# CANADIAN AUDIENCE REPORT

Focus on official language minority  
communities in Canada

November 2018

# RESEARCH FUNDING

Telefilm Canada is a federal cultural agency dedicated to the cultural, commercial and industrial success of Canada's audiovisual industry. On behalf of the Government of Canada, as a Crown corporation, it supports dynamic companies and creative talent, providing financial support to Canadian film projects and promoting Canadian audiovisual success and talent at festivals, markets and events—regionally, nationally and around the world.

In a context of rapidly changing audience behavior, Telefilm began collecting audience data in 2012 to provide market intelligence to industry stakeholders regarding Canadian consumption of media content and to track trends. Since 2016, Telefilm has used the services of Nielsen Media to conduct consumer studies in the Canadian market.

Telefilm has partnered with other funding agencies and research groups to fund and make studies widely available. This study was financed in partnership with the Canada Media Fund (CMF).

For any questions, please contact [SR@telefilm.ca](mailto:SR@telefilm.ca).

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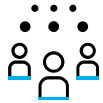
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# METHODOLOGY AND CONTEXT

# OBJECTIVES

The primary objectives of the 2018 iteration of the study are:



To gain an understanding of official language minority communities' consumption of content in Canada. This objective was set in association with the Alliance des producteurs francophones du Canada and the English Language Arts Network of Quebec.

In addition, engagement with Canadian content was examined and opportunities to connect with audiences were identified.

# METHODOLOGY

- Nielsen conducted an online (CAWI) survey among Canadians aged 15 years and over to assess their media consumption habits, behaviour and attitudes.
- The survey was in field between March 30th and April 18th, 2018.
- The survey took an average of 32 minutes to complete.
- A total of n=3,004 Canadians were surveyed as part of this research initiative, with quotas assigned based on age, gender, and region.
- Data presented throughout this report has been weighted by age, gender and region to match the distribution of the demographics in Canada.

Age	Total	Quebec	Rest of Canada
15-34	703	120	583
35-54	1350	281	1,069
55+	951	243	708
<b>Total</b>	<b>3,004</b>	<b>644</b>	<b>2,360</b>

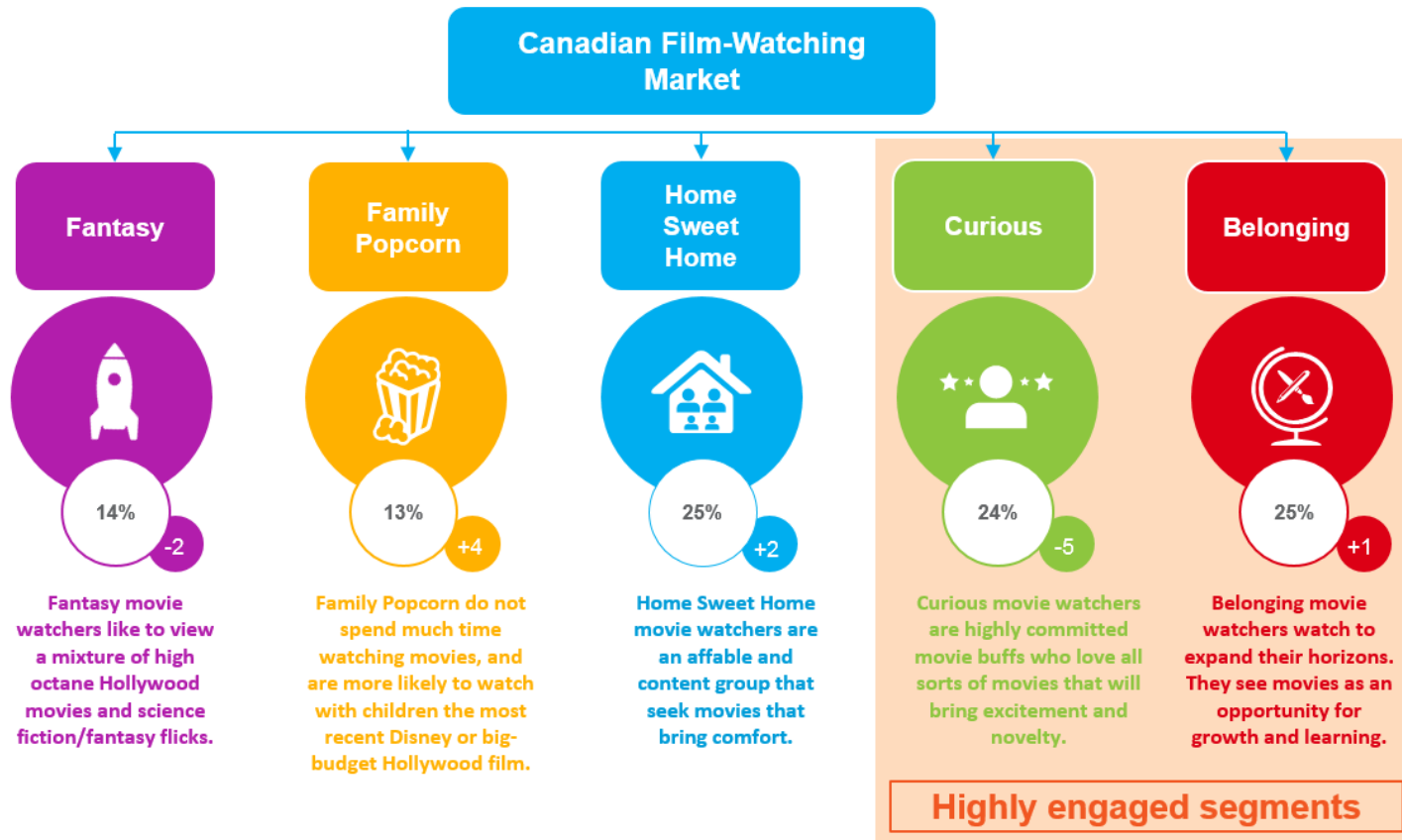
Gender	Total	Quebec	Rest of Canada
Male	1,403	324	1,079
Female	1,601	320	1,281
<b>Total</b>	<b>3,004</b>	<b>644</b>	<b>2,360</b>

Language	Total	Quebec	Rest of Canada
English	1,950	110	1,840
French	553	455	98
Other	501	79	422
<b>Total</b>	<b>3,004</b>	<b>644</b>	<b>2,360</b>

Region	Total
BC	399
Alberta	300
Manitoba/ Sask.	300
Ontario	1,068
Quebec	644
Atlantic	293
<b>Total</b>	<b>3,004</b>

# HIGHLY ENGAGED SEGMENTS

As identified in the 2016 iteration of the Canadian Audience study, the Canadian market was divided into 5 film watching segments.



# HIGHLY ENGAGED SEGMENTS

## PRIMARY TARGETS TO PROMOTE CANADIAN CONTENT

As identified in the 2016 iteration of the Canadian Audience study, the Canadian market was divided into 5 film watching segments. The below segments are the highly engaged segments:

### Curious

24%

- They are **heavy** movie viewers.
- They have eclectic tastes.
- They watch movies to **grow, learn, escape** and have **fun**.
- They enjoy and support Canadian movies.
- They believe it is important to promote Canadian movies.
- They seek **novelty** and expect more **diversity** from movies.

### Belonging

25%

- They are **medium** movie viewers.
- Their taste is more driven by variety and quality than genre.
- They watch movies for **identity and cultural reasons** and to **grow**.
- They are open and sensitive to Canadian movies – and particularly from Quebec-, but are more passive (won't actively seek them).
- They are driven by **quality, diversity, cultural affinity**.

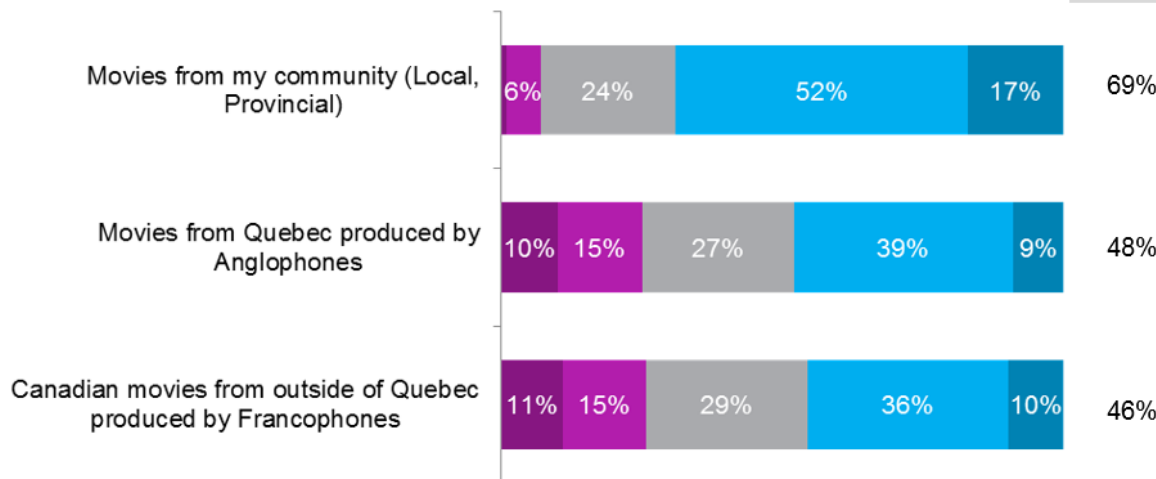


# KEY FINDINGS

# INTEREST IN DIFFERENT TYPES OF CANADIAN MOVIES

Residents of Quebec and Franco-Canadians are more likely to be interested in Quebec movies produced by Anglophones and movies from outside Quebec produced by francophones

■ 1 - Not at all interested    ■ 2 - Not very interested    ■ 3 - Neither  
 ■ 4 - Somewhat interested    ■ 5 - Very interested



2018 Interested (4,5) n=1,601	English		French	
	Rest of Canada Interested (4,5) n=999	Quebec Interested (4,5) n=60	Rest of Canada Interested (4,5) n=56	Quebec Interested (4,5) n=243
	A	B	C	D
	67%	70%	72%	72%
	41%	73% AD	68% A	56% A
	35%	56% A	68% A	75% AB

ABCD significantly higher than other subgroups

DS2A. How interested are you in the following types of Canadian movies?  
 Base: Interested In Canadian Movies and also movie viewers (2018 n=1,601)

# CONSUMERS INTERESTED IN PRODUCTIONS MADE BY MEMBERS OF OFFICIAL LANGUAGE MINORITY COMMUNITIES SHARE SIMILARITIES

The following subgroups are significantly more likely to be **interested (4,5) in movies from their community**  
**69%**

- Females
- Have children under 18 in the household
- Can name a Canadian movie
- Have watched a Canadian movie in the past 12 months
- Attend Canadian, US or international film festivals
- Those in Curious segment\*

The following subgroups are significantly more likely to be **interested (4,5) in movies from Quebec produced by Anglos**  
**48%**

- **Residents of Quebec (61%)**
- University or post-graduate education
- **Can name a Canadian movie**
- **Have watched a Canadian movie in the past 12 months**
- **Attend Canadian, US or international film festivals**
- **Aware of Telefilm**
- **Those in Belonging or Curious segment\***

The following subgroups are significantly more likely to be **interested (4,5) in Canadian movies from outside of Quebec produced by Francos**  
**46%**

- **Residents of Quebec (71%)**
- Heavy or medium movie watchers
- **Can name a Canadian movie**
- **Have watched a Canadian movie in the past 12 months**
- **Attend Canadian, US or international film festivals**
- **Aware of Telefilm**
- **Those in Belonging or Curious segment\***

\*See appendix for segment definitions

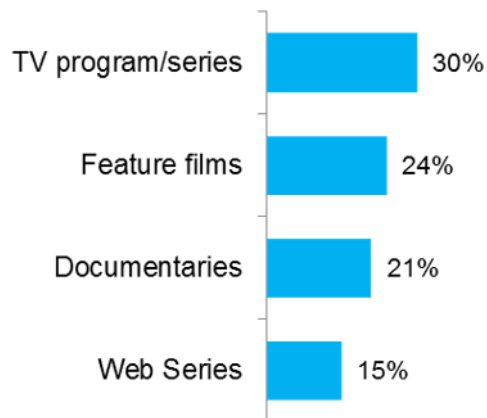
DS2A. How interested are you in the following types of Canadian movies?

Base: Interested In Canadian Movies and also movie viewers (2018 n=1,601)

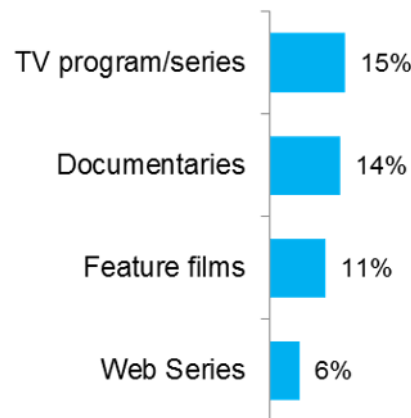
# AWARENESS OF PRODUCTIONS MADE BY MEMBERS OF OFFICIAL LANGUAGE MINORITY COMMUNITIES IN CANADA

Quebec residents are more likely to be aware of English productions from Quebec than rest of Canada is likely to be aware of French productions produced outside of Quebec

**Awareness of English-language productions made in Quebec**  
(Among Quebec Respondents)



**Awareness of French-language productions made outside of Quebec**  
(Among Respondents Outside of Quebec)



CC8A. Are you aware of the following different kinds of productions made in Quebec by English language producers?

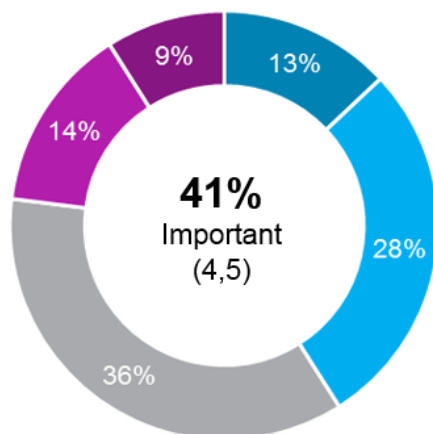
Base: All Quebec respondents (2018 n=644)

CC8B. Are you aware of the following different kinds of productions made in Canada outside of Quebec by French language producers?

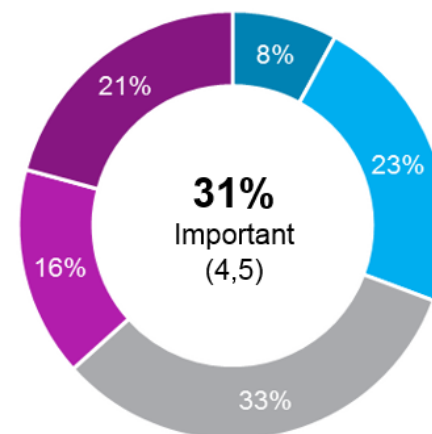
Base: Respondents outside Quebec, (2018 n=2,360)

# IMPORTANCE OF SEEING PRODUCTIONS MADE BY MEMBERS OF OFFICIAL LANGUAGE MINORITY COMMUNITIES

**Importance of seeing productions made about Quebec's English speaking community**  
(Among Quebec Respondents)



**Importance of seeing productions made about French speaking community outside Quebec**  
(Among Respondents Outside of Quebec)



■ (5) Very important   ■ (4) Somewhat important   ■ (3) Neither   ■ (2) Not very important   ■ (1) Not at all important

CC9A. How important do you think it is for you to see productions (feature films/ documentaries/ television programs/series etc.) that share stories about Quebec's English speaking community?

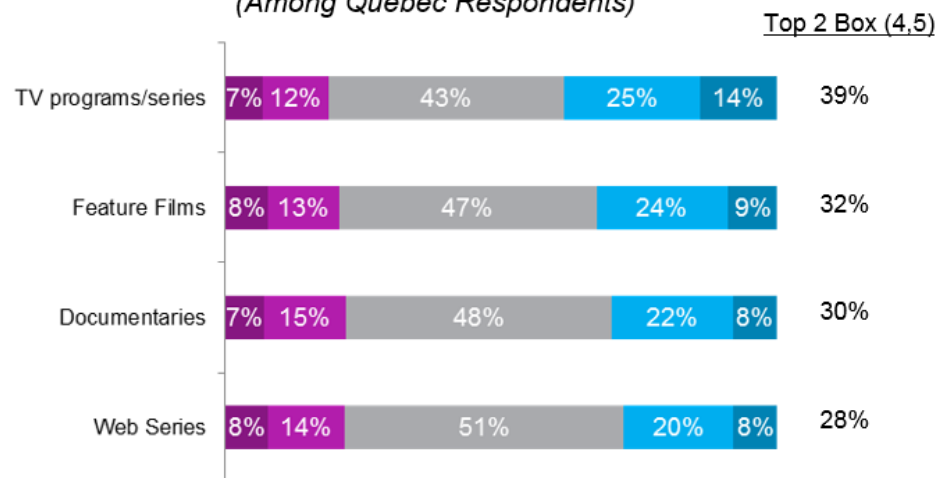
Base: All Quebec respondents, (2018 n=644)

CC9B. How important do you think it is for you to see productions (feature films/ documentaries/ television programs/series etc.) that share stories about French speaking community outside Quebec?

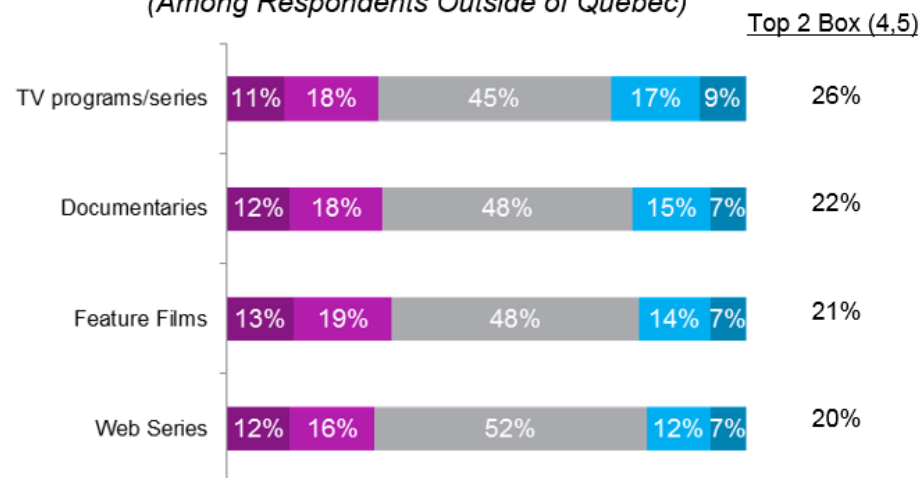
Base: Respondents outside Quebec, (2018 n=2,360)

# ACCESSIBILITY OF PRODUCTIONS MADE BY MEMBERS OF OFFICIAL LANGUAGE MINORITY COMMUNITIES

**Ease of availability of Quebec-based English language productions**  
(Among Quebec Respondents)



**Ease of availability of French language productions made outside Quebec**  
(Among Respondents Outside of Quebec)



■ Very difficult to find (1) ■ Somewhat difficult to find (2) ■ Neither (3) ■ Somewhat easily available (4) ■ Very easily available (5)

CC10A. How easily available are Quebec based English-language productions in your community?

Base: All Quebec respondents, (2018 n=644)

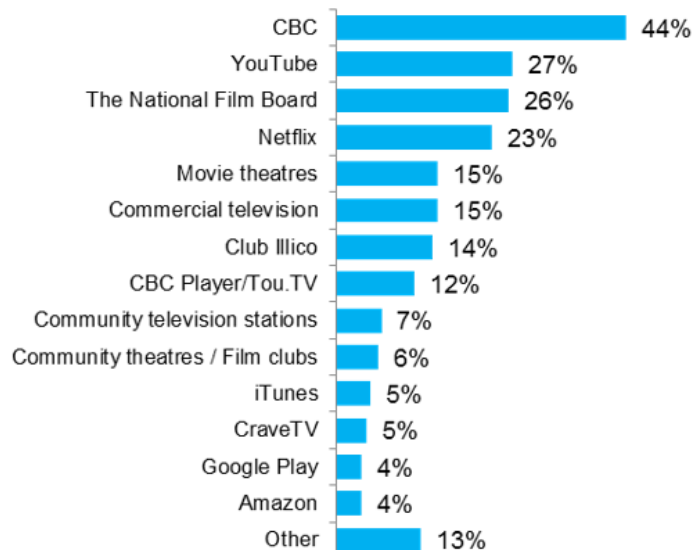
CC10B. How easily available are French-language productions based outside of Quebec in your community?

Base: Respondents outside Quebec, (2018 n=2,360)

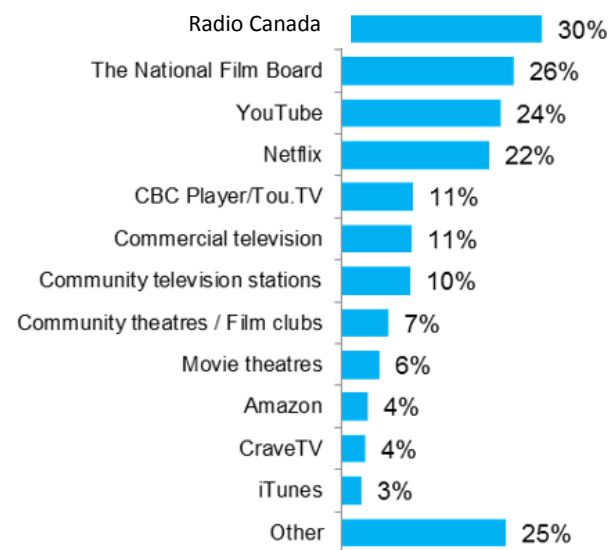
# CBC / RADIO CANADA IS THE MOST COMMONLY USED TO WATCH CONTENT MADE BY MEMBERS OF OFFICIAL LANGUAGE MINORITY COMMUNITIES

Sources used to watch respective contents

**Sources used to watch English-language productions made in Quebec**  
(Among Quebec Respondents)



**Sources used to watch French-language productions made outside of Quebec**  
(Among Respondents Outside of Quebec)



CC11A. What are the best sources to watch English-language productions made in Quebec?

Base: All Quebec respondents, (2018 n=644)

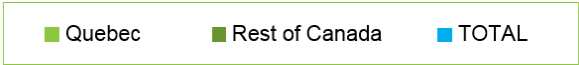
CC11B. What are the best sources to watch French-language productions made outside of Quebec?

Base: Respondents outside Quebec, (2018 n=2,360)

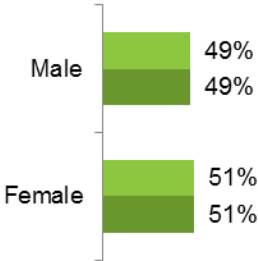
# APPENDIX



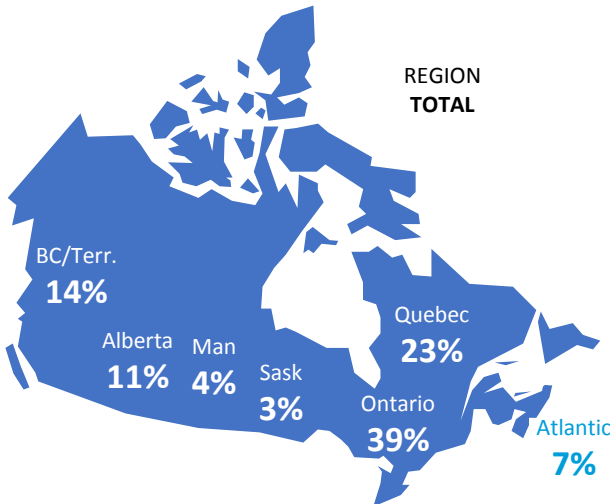
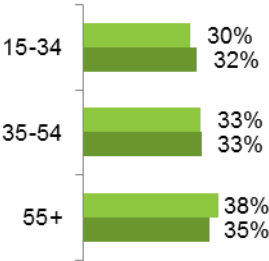
# DEMOGRAPHICS



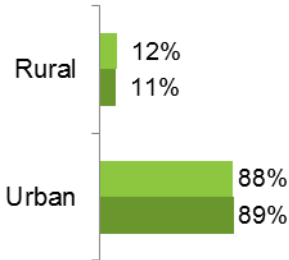
GENDER



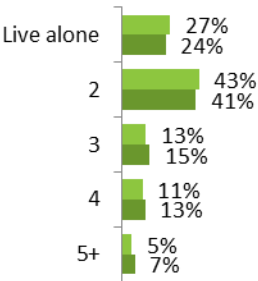
AGE GROUPS



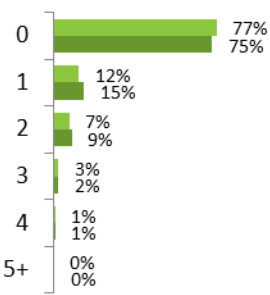
REGION



HOUSEHOLD



HOUSEHOLD (UNDER 18)

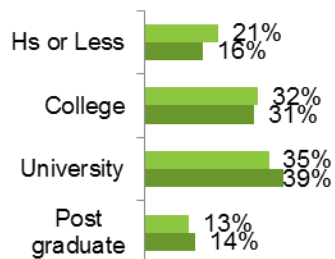


Base: All Quebec respondents, n=644  
Base: All respondents outside of Quebec, n=2,360

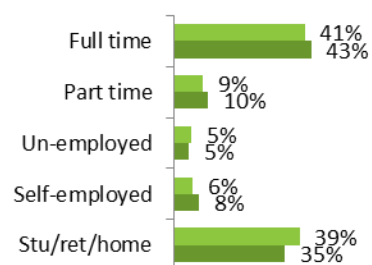
# DEMOGRAPHICS

■ Quebec ■ Rest of Canada

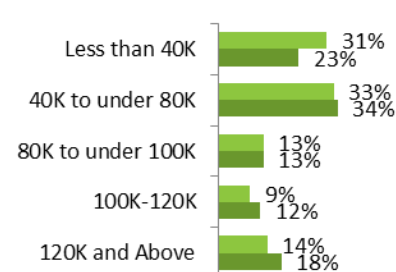
## EDUCATION



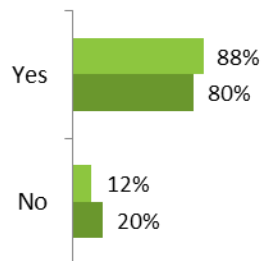
## EMPLOYMENT



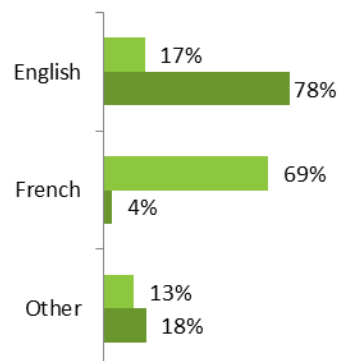
## INCOME



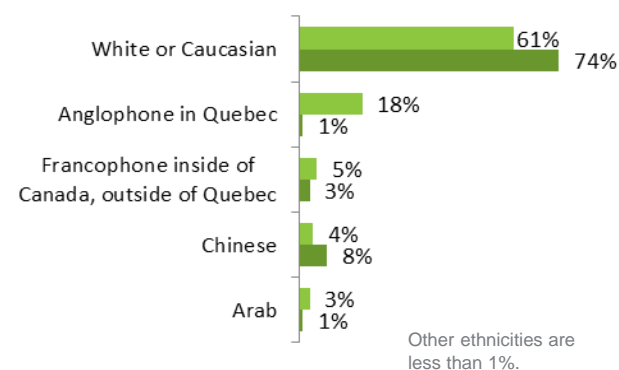
## BORN IN CANADA



## MOTHER TONGUE



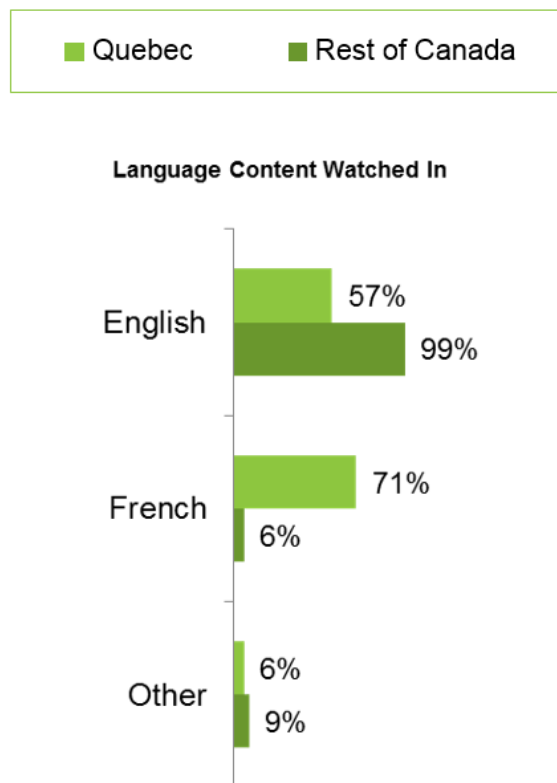
## ETHNICITY



Base: All Quebec respondents, n=644  
Base: All respondents outside of Quebec, n=2,360

# LANGUAGES CONTENT WAS WATCHED IN

Percentage of respondents who watch content by language and region

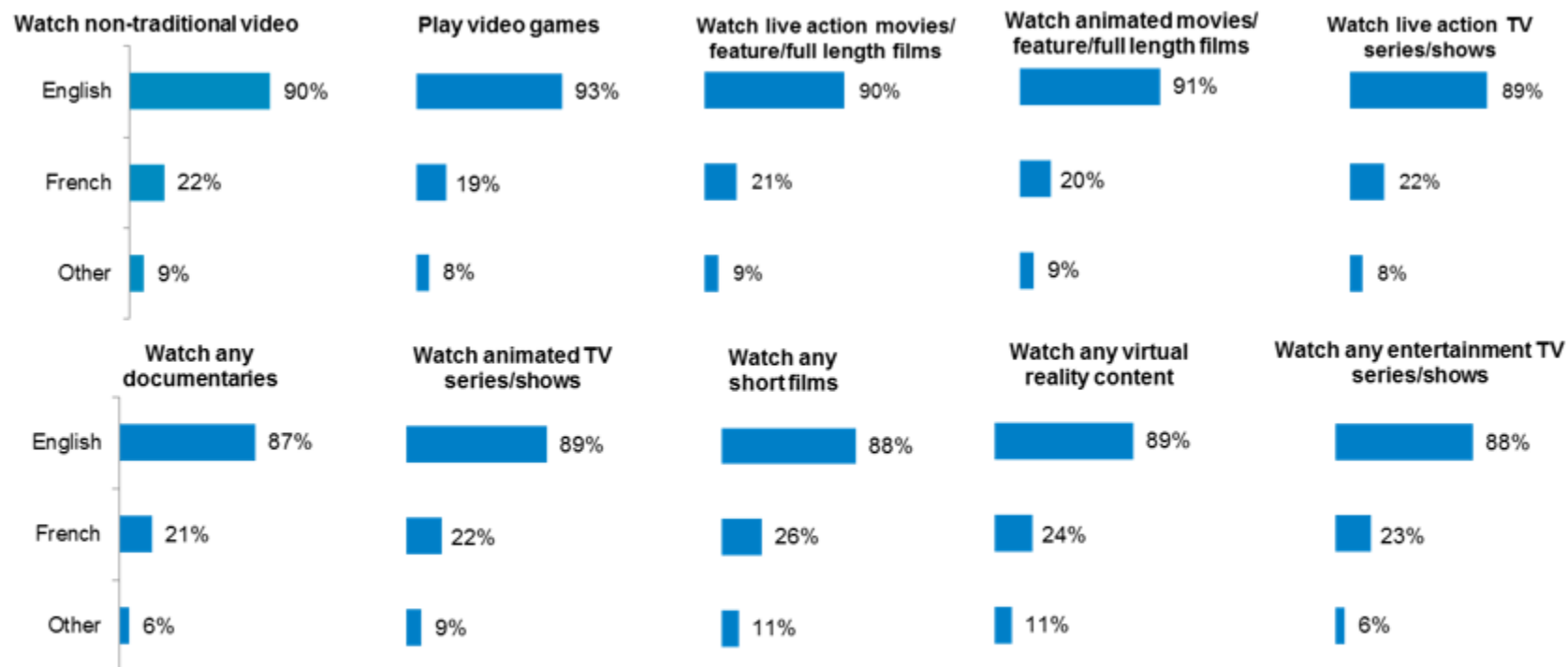


Base: All Quebec respondents, n=644

Base: All respondents outside of Quebec, n=2,360

# CONTENT VIEWERSHIP BY LANGUAGE

Percentage of respondents that watch various content by language



QVH6A. Thinking about the past 12 months, in which languages have you watched any types of content (movies, TV series, documentaries, short films, non-traditional videos, etc.)? If more than one language was spoken, please select the primary language.  
Base: Those who have watched content in the past 12 months, n= the base varies

**TELEFILM**  
C A N A D A