



CANADIAN AUDIENCE REPORT

Full report



November 2017

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INTRODUCTION

INTRODUCTION

Telefilm Canada is a federal Crown agency dedicated to the cultural, commercial, and industrial success of Canada's audiovisual industry.

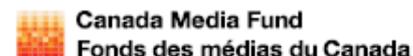
Through funding and promotion programs, as well as initiatives that increase the discoverability and export of Canadian content, Telefilm supports dynamic companies and creative talent at home and around the world.

As part of its thought leadership mandate, Telefilm began providing market intelligence to industry stakeholders regarding Canadian consumption of media content in 2012. Since 2016, Nielsen Media has been retained to conduct these studies of behalf of Telefilm.

Telefilm collaborates with private and public partners to help finance research and to make these studies widely available. This study was financed in partnership with the Canada Media Fund (CMF).

For any questions, please contact SR@telefilm.ca.

Produced with the assistance of:



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Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Telefilm Canada, nor the CMF. The funders are in no way bound by the recommendations contained in this document.

RESEARCH OBJECTIVES

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The primary objectives of the 2017 iteration of the study are:

- to provide an overview of film and television consumption habits on a variety of screens and media
- to identify any emerging content trends

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

OVERALL KEY FINDINGS

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Pride and interest in Canadian culture is strong among Canadians:

- Canadians are proud when Canadian talent & content is celebrated internationally
- The majority of Canadians think promoting Canadian content is important
- 78% of respondents agree it is important that the government support the creation of distinctively Canadian productions

Wide reaching platforms have the most impact on Canadians for content viewing and as sources of information:

- Netflix and YouTube are the top online viewing platforms
- Web searches are the most important source of information
- National and international award shows resonate with audiences, while familiarity with national and international film festivals is limited

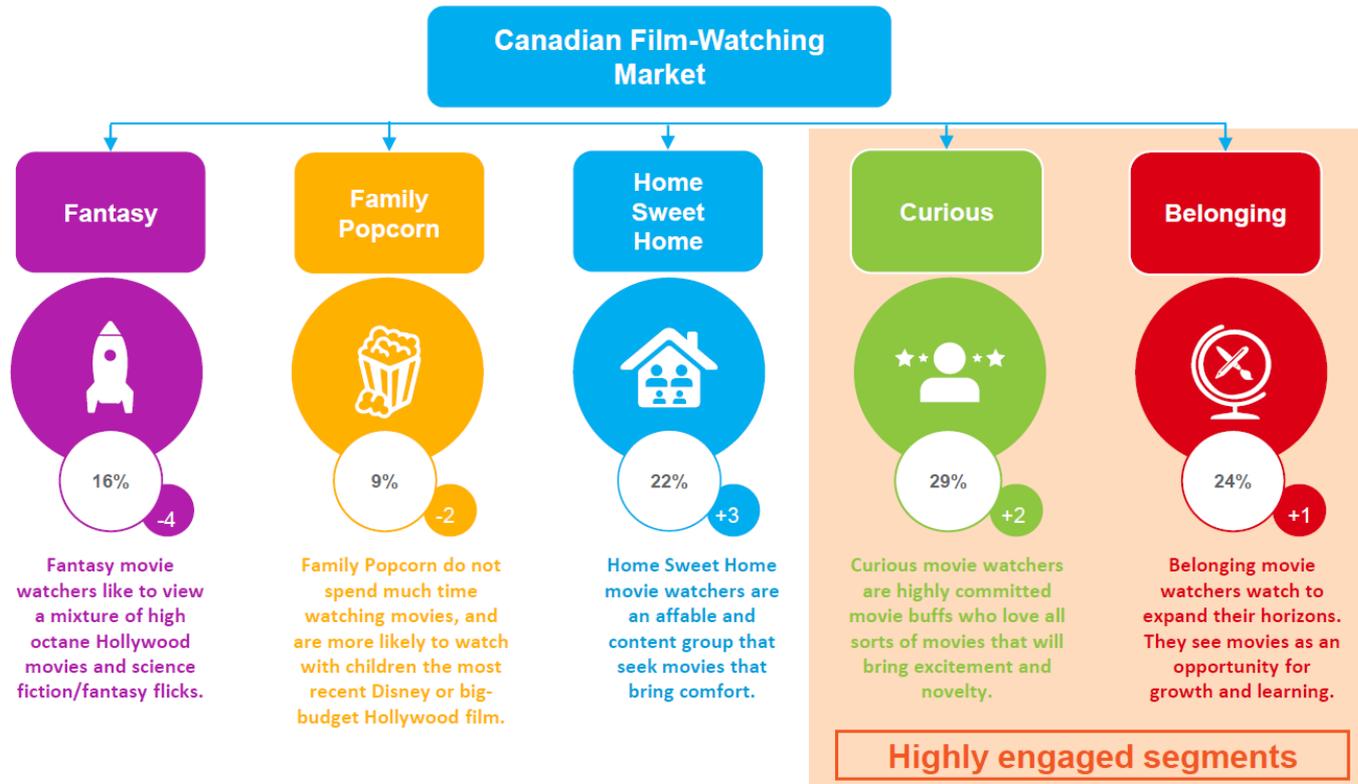
Content viewing is up across films, television and documentaries

- The two market segments that show the most interest in Canadian content, and the most potential for the industry, *The Curious* and *The Belonging*, grew year-over-year

EXECUTIVE SUMMARY

AUDIENCE SEGMENTS IN THE CANADIAN MARKET

Five film watching segments were identified in the 2016 iteration of the study



HIGHLY ENGAGED SEGMENTS ARE GROWING

The two market segments that show the most interest in Canadian content, and the most potential for the industry, grew year-over-year

Curious

29%

- 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

24%

- 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**.

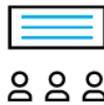
ENGAGEMENT TOWARDS CANADIAN FILMS ON THE RISE

53% of Canadians **watched** a
Canadian movie in the past year

+5 pts VERSUS 2016

65% Interested in Canadian
movies

+4 pts VERSUS 2016



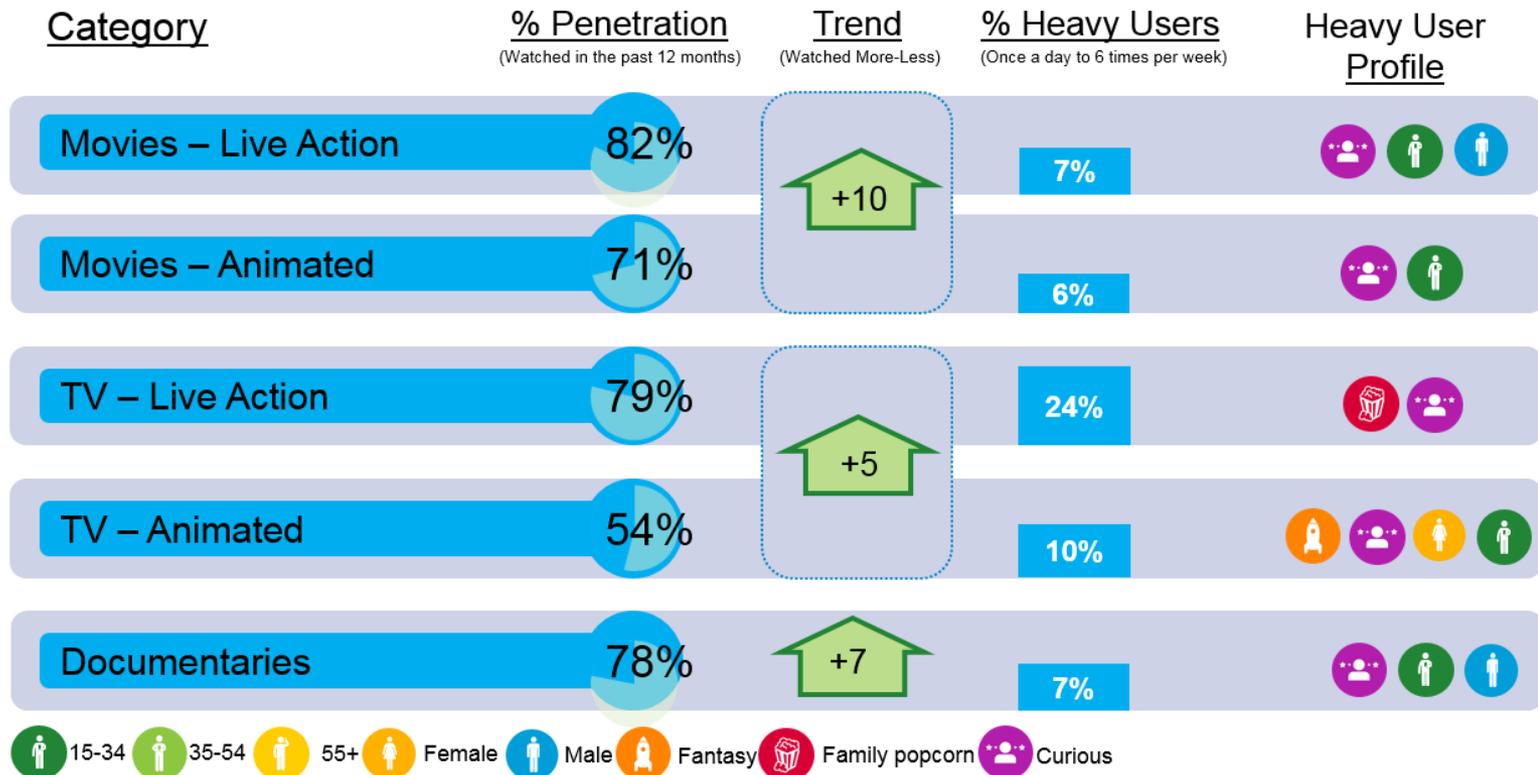
54% of Canadians **can name** a
Canadian movie

+4 pts VERSUS 2016

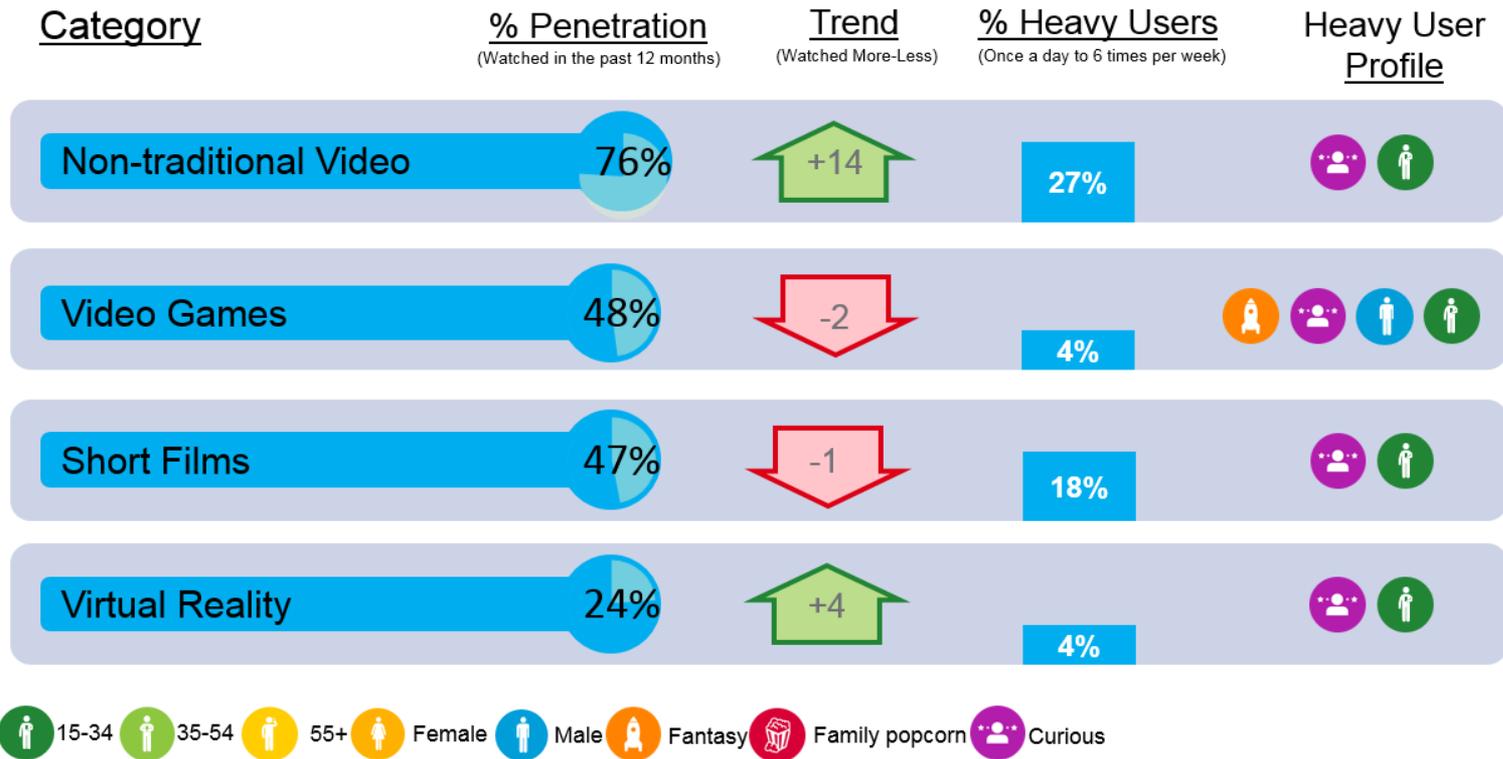
78% of Canadians **agree** that Telefilm
plays an **important role**

+4 pts VERSUS 2016

VIEWING AND CONSUMPTION SCORECARD

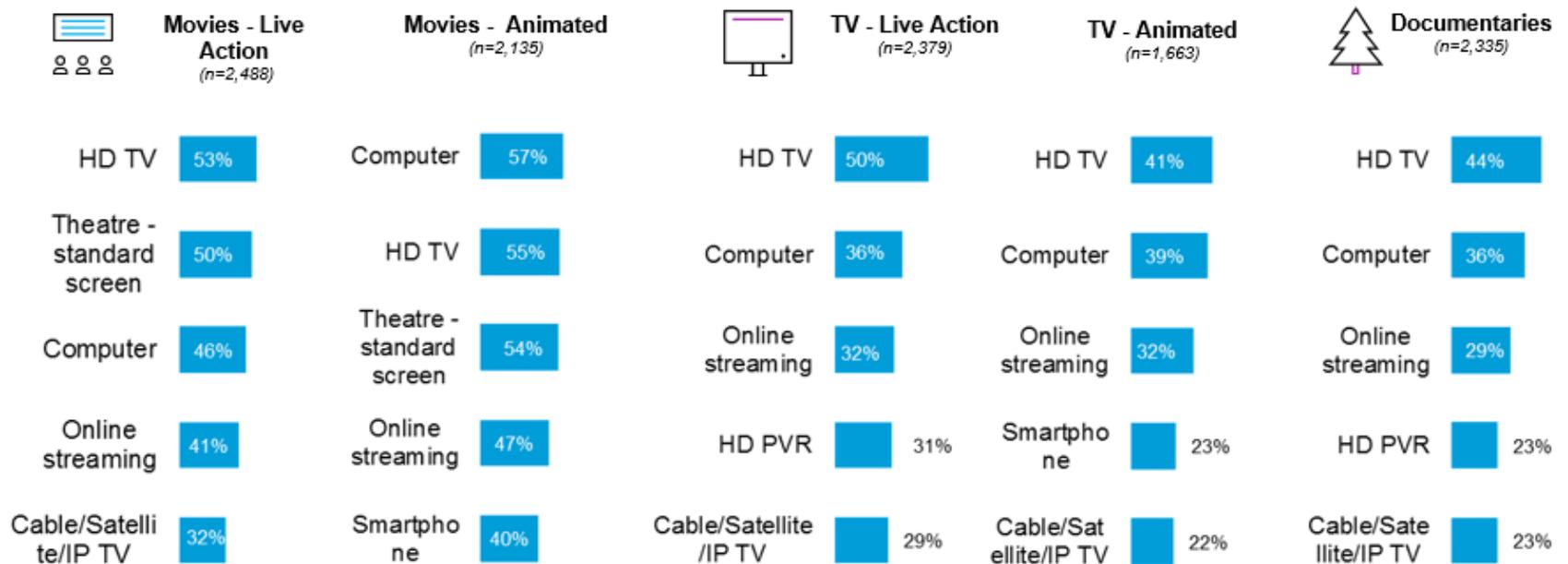


VIEWING AND CONSUMPTION SCORECARD



HD TV AND COMPUTER ARE DOMINANT SCREENS

Top five platforms in which content was watched

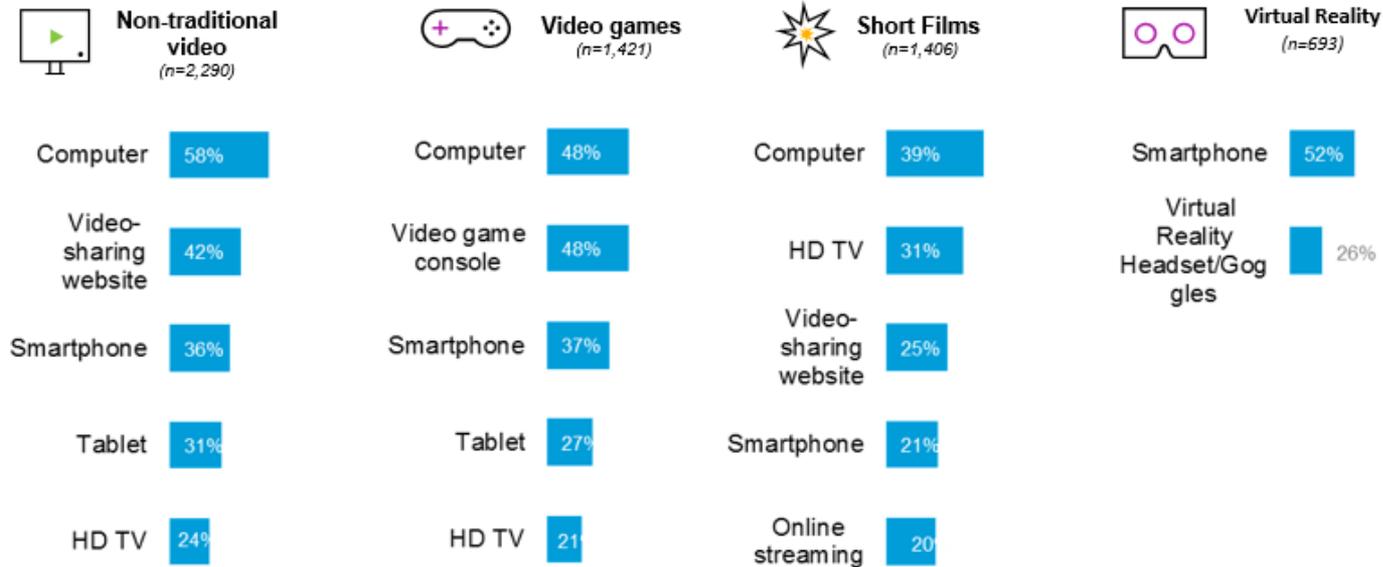


QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?

Base: Those who have watched content in the past 12 months, n=Base varies

COMPUTER DOMINATES LOWER INCIDENCE VIEWING

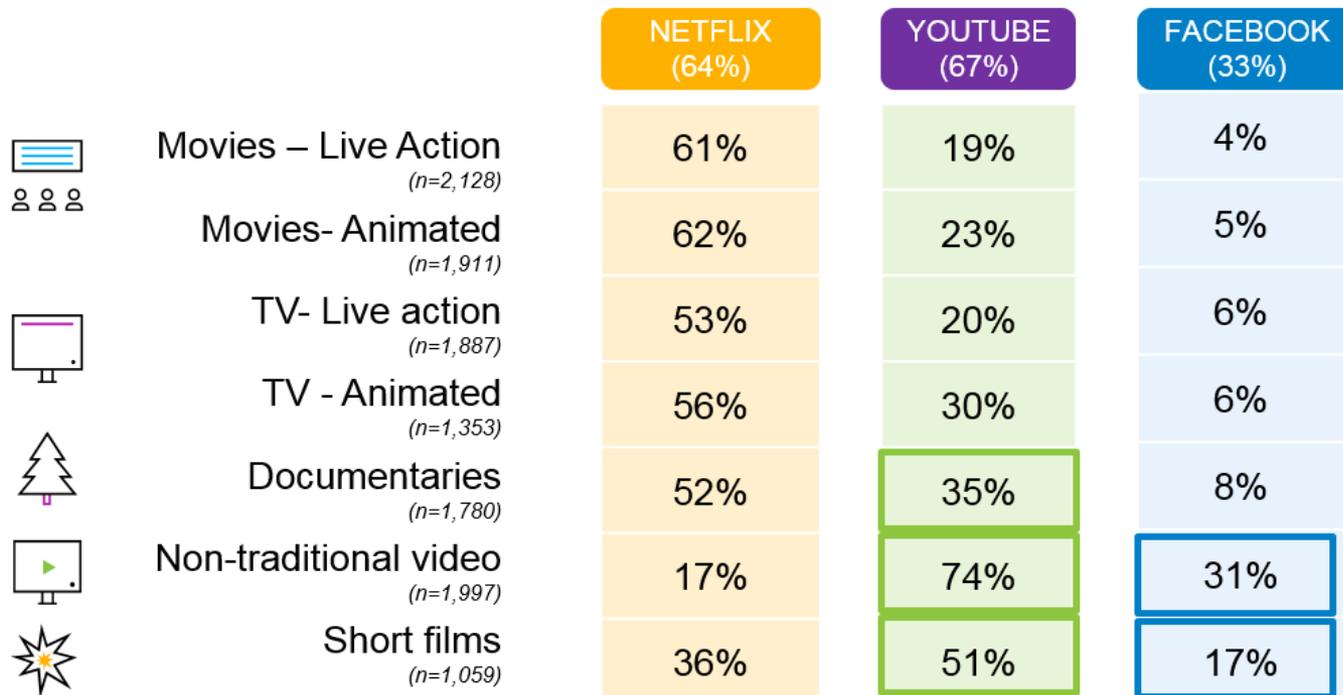
Top five platforms in which content was watched



QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?

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NETFLIX TOPS ONLINE PLATFORMS FOR MOVIE VIEWING



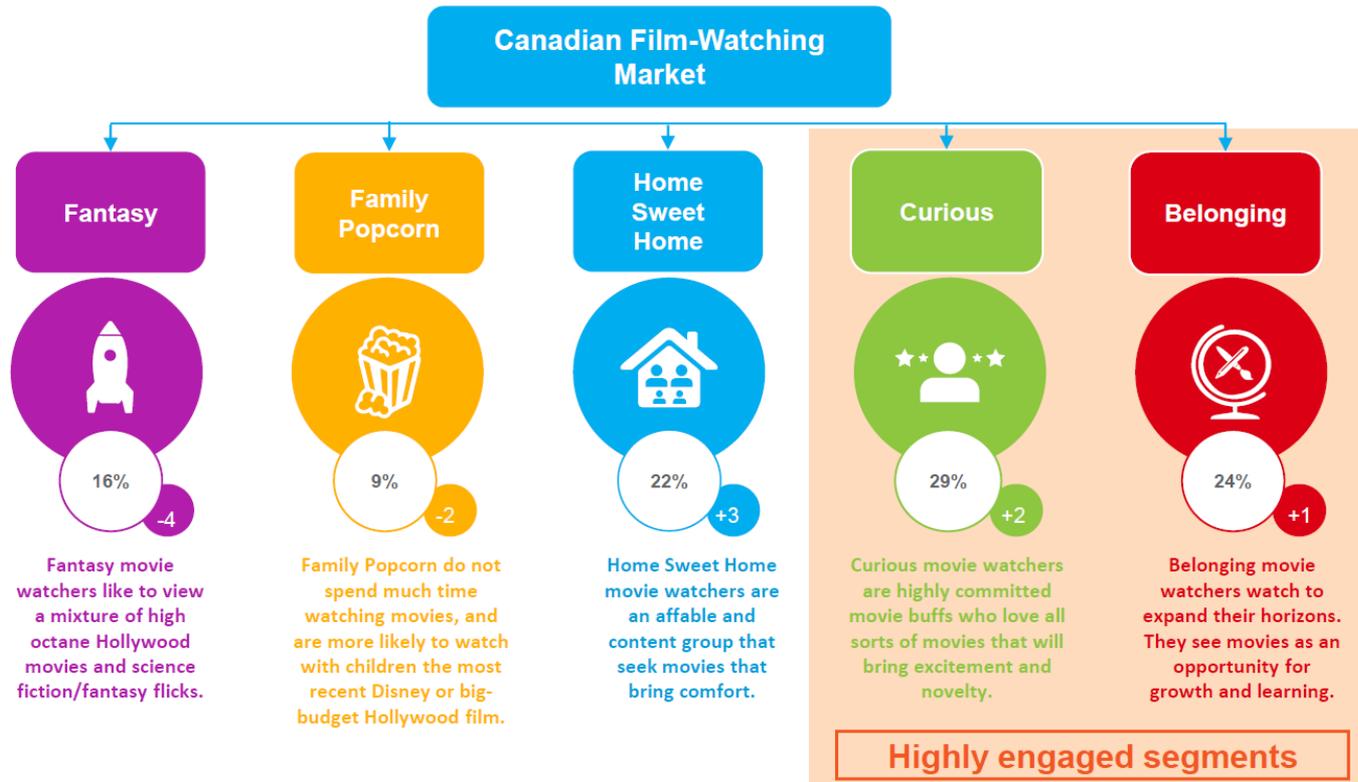
QVH5. Which of the following online platforms have you used to...?

Base: Those who have watched content on online streaming or rental platforms; n=Base varies

KEY FINDINGS: VIEWING HABITS

AUDIENCE SEGMENTS IN THE CANADIAN MARKET

Five film watching segments were identified in the 2016 iteration of the study



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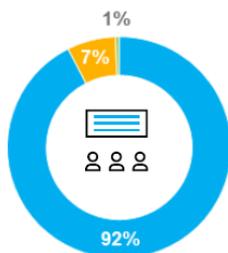
Belonging

24%

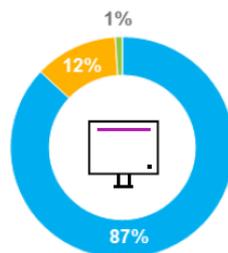
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- They are driven by **quality, diversity, cultural affinity**.

90% OF RESPONDENTS CONSUMED MOVIES OR TV SERIES

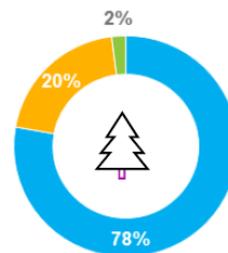
Audiovisual media consumption in past 12 months



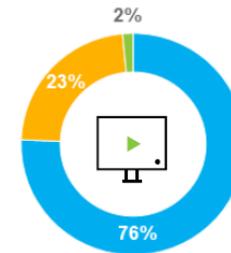
Movies (Net)



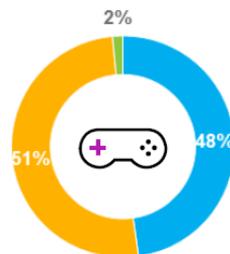
TV Series/Shows (Net)



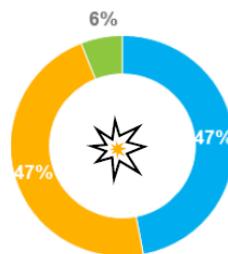
Documentaries ↑



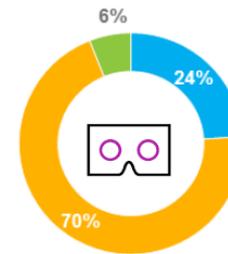
Non-traditional video



Video Games



Short Films



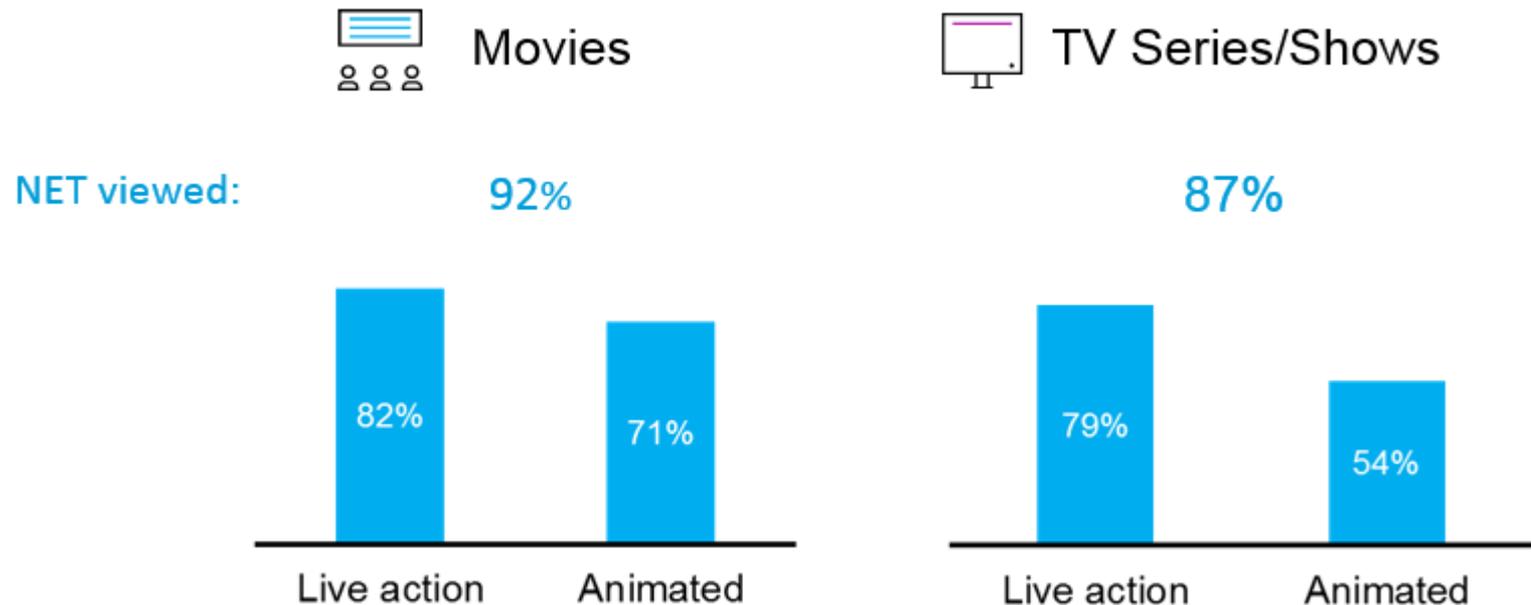
Virtual Reality

■ Yes
■ No
■ Don't know
↑ Evolution VS 2016

QVH1. Thinking about the past 12 months, which of the following have you done?
 Base: All respondents, n=3009

LIVE ACTION MOVIE AND TV CONTENT MOST LIKELY TO BE VIEWED

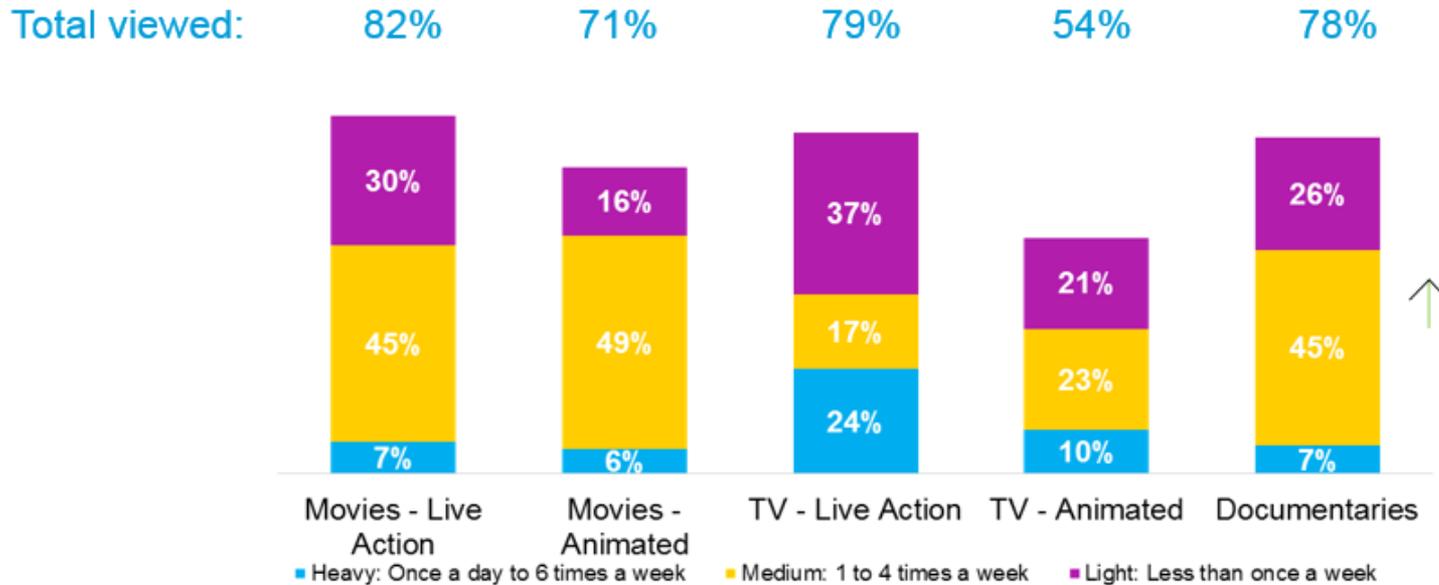
Movie and TV category consumption in past 12 months



QVH1. Thinking about the past 12 months, which of the following have you done?
Base: All respondents, n=3009

LIVE ACTION TV MOST LIKELY TO SEE HEAVY VIEWING

Frequency of viewing in past 12 months as a proportion of overall respondents

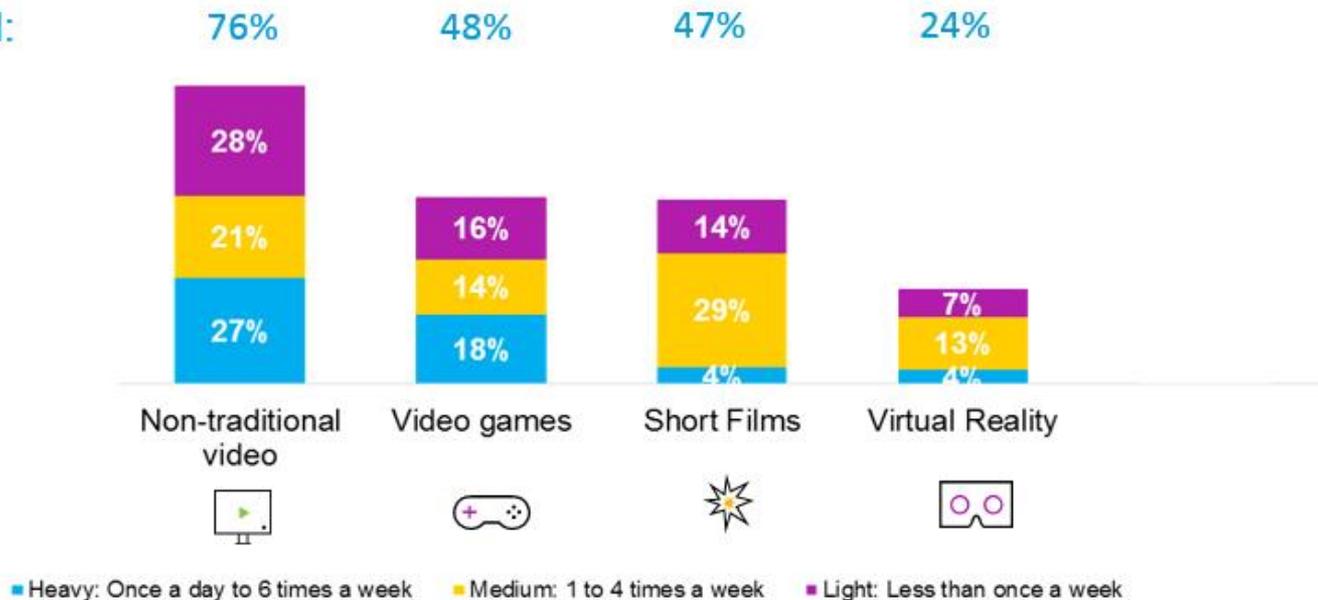


QVH2. On average, how often would you say you do the following?
Base: All respondents, n=3009

NON-TRADITIONAL VIDEOS SEE HEAVY VIEWING

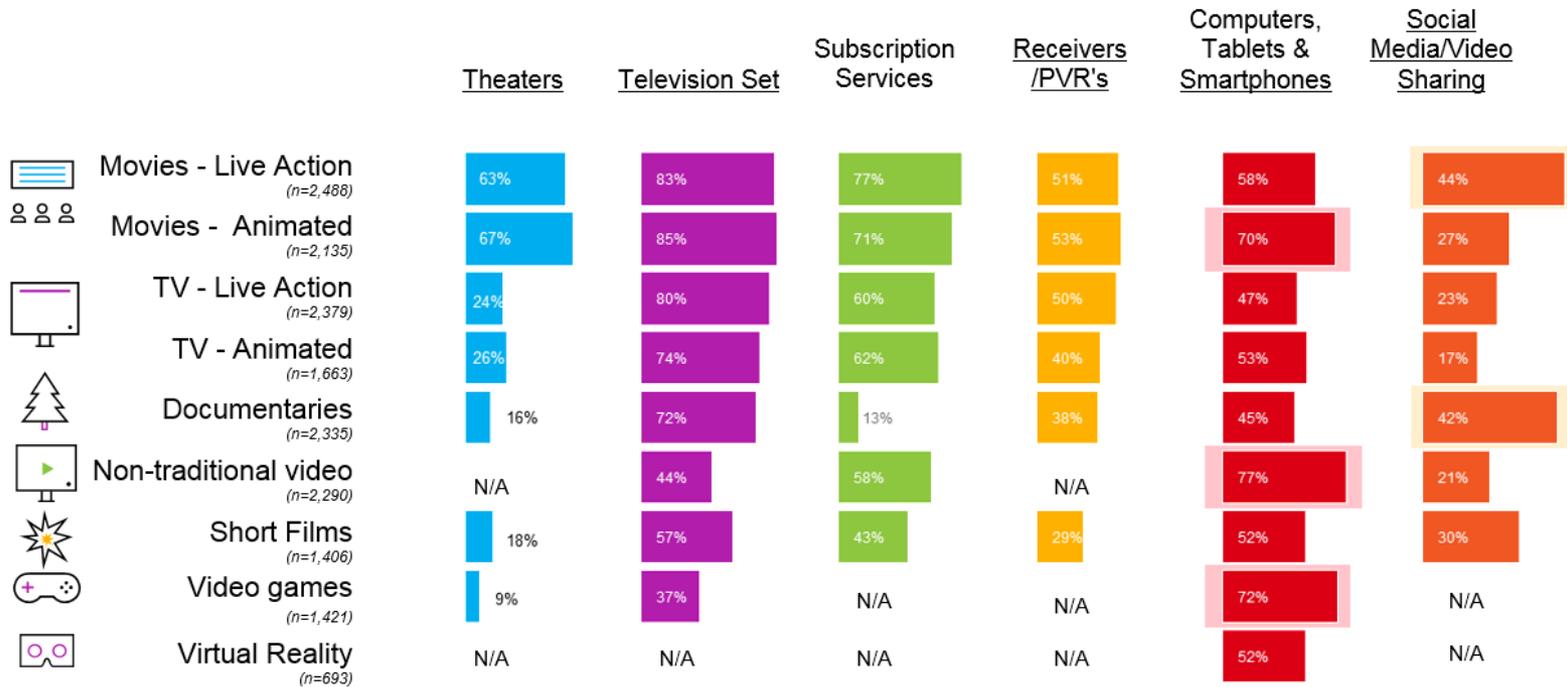
Frequency of viewing in past 12 months as a proportion of overall respondents

Total viewed:



QVH2. On average, how often would you say you do the following?
Base: All respondents, n=3009

PLATFORM USED PER CONTENT

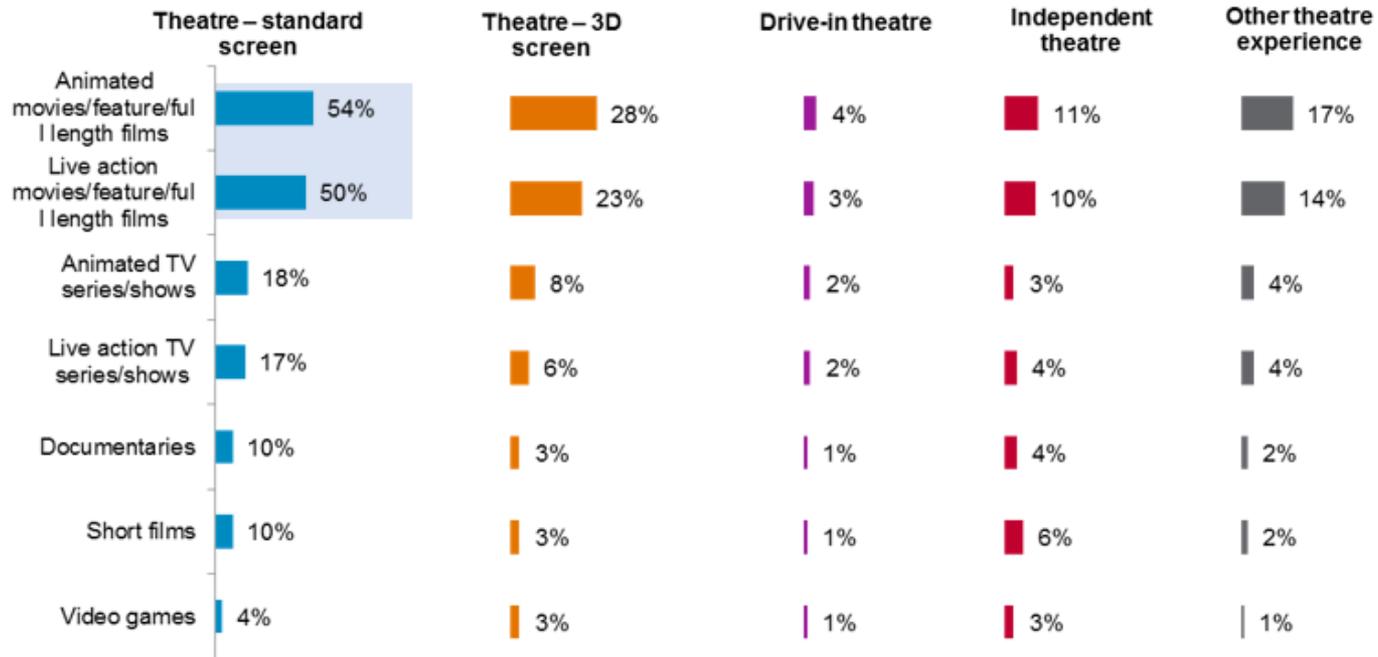


A variety of content is viewed on multiple platforms:

- Computers, tablets and smartphones are most commonly used to watch animated movies, non-traditional videos and video games
- Social media and video sharing are most commonly used for live action movies and documentaries

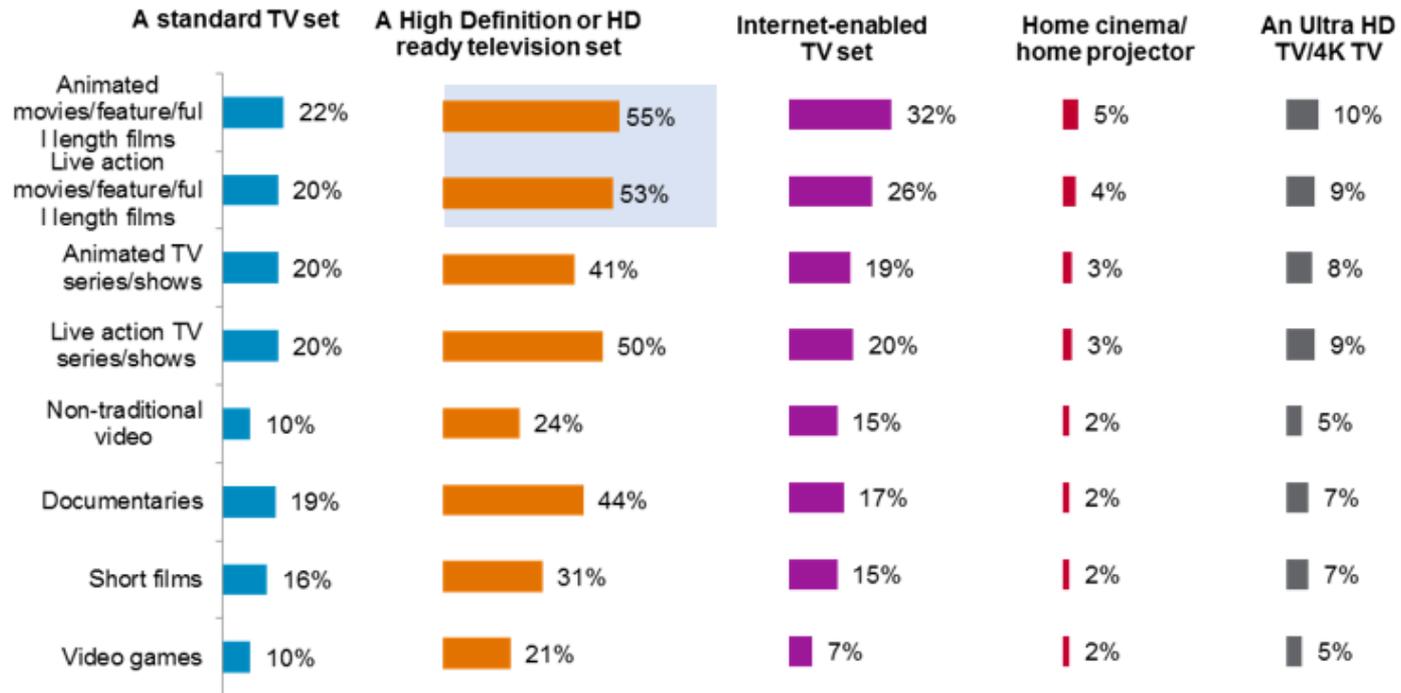
QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?
 Base: Those who have watched content in the past 12 months, n=Base varies

MORE THAN HALF OF CANADIANS WATCHED MOVIES AT THE CINEMA



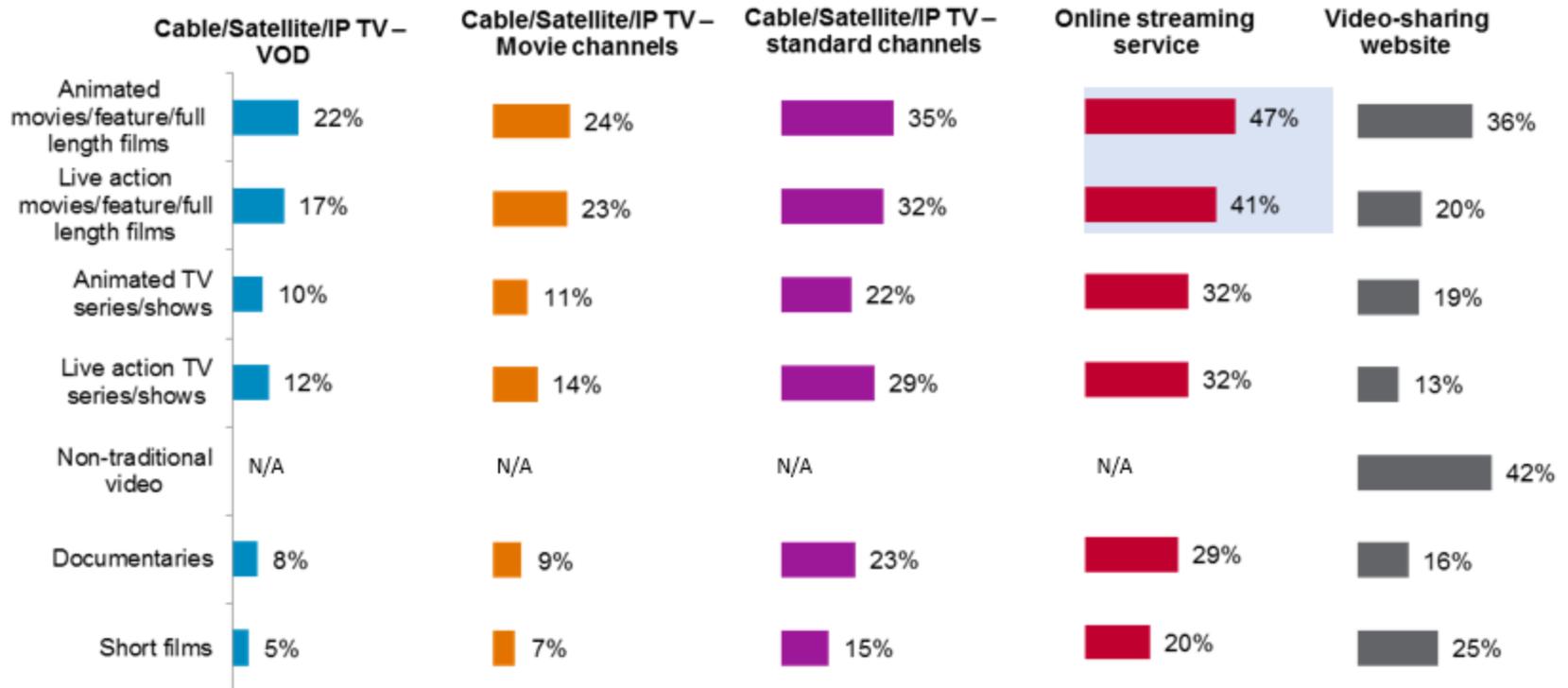
QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?
 Base: Those who have watched content in the past 12 months, n=Base varies

ON TELEVISION, MOVIES ARE MOST COMMONLY WATCHED IN HD



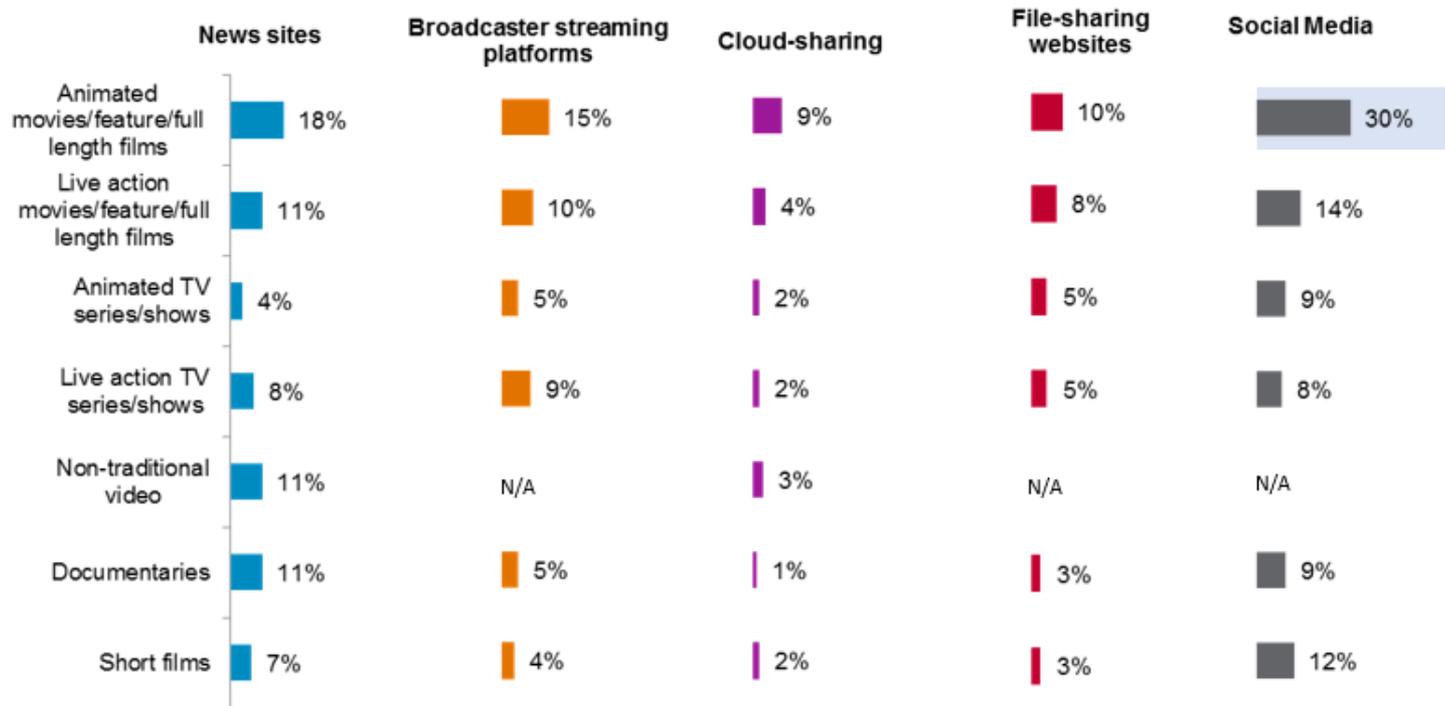
QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?
 Base: Those who have watched content in the past 12 months, n=Base varies

ONLINE STREAMING SERVICES ARE FAVOURED FOR FILM VIEWING



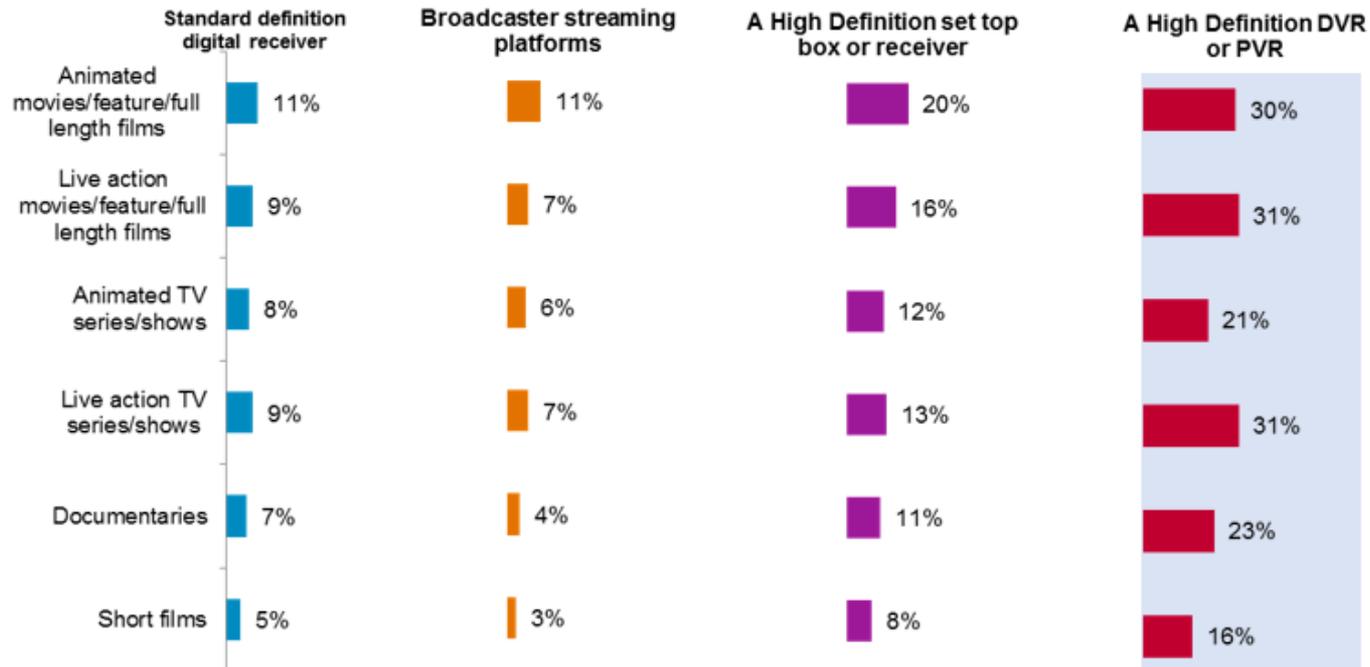
QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?
 Base: Those who have watched content in the past 12 months, n=Base varies

SOCIAL MEDIA COMMONLY USED FOR WATCHING ANIMATED MOVIES



QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?
 Base: Those who have watched content in the past 12 months, n=Base varies

HD DVR/PVR IS USED TO VIEW ALL TYPES OF CONTENT

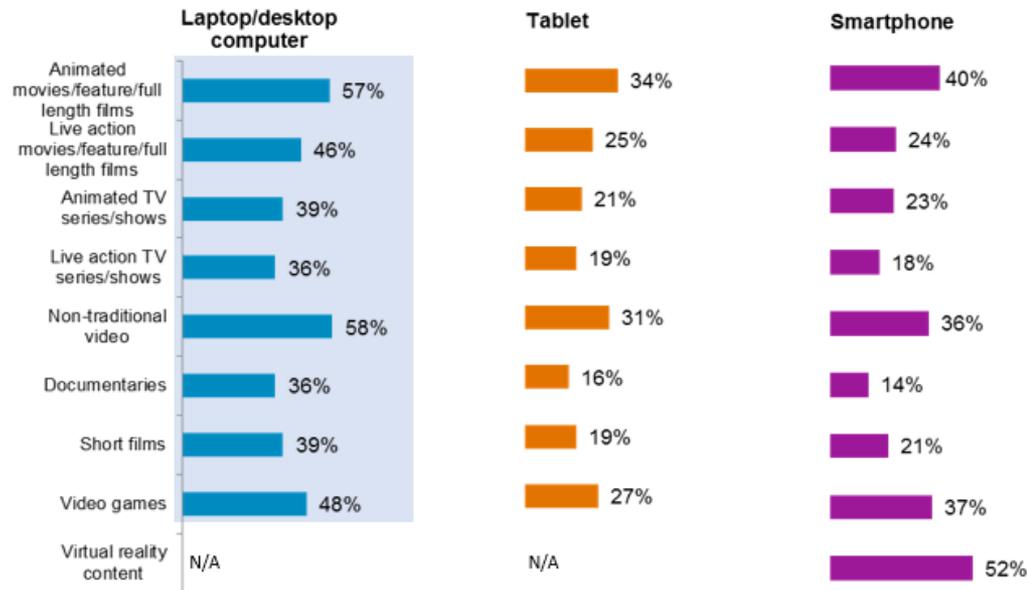


QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?

Base: Those who have watched content in the past 12 months, n=Base varies

COMPUTERS ARE USED TO VIEW ALL TYPES OF CONTENT

Platforms used to watch content - computers, tablets & smartphones

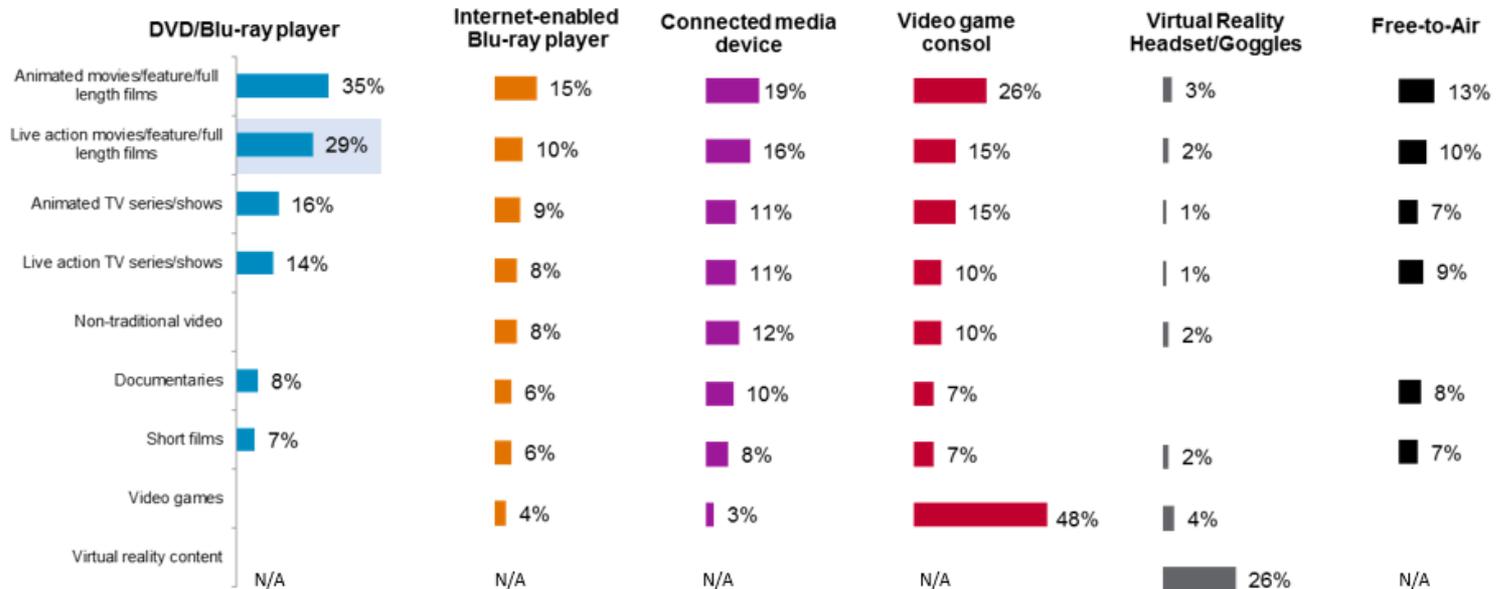


QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?

Base: Those who have watched content in the past 12 months, n=Base varies

NEARLY 1/3 CANADIANS WATCH LIVE ACTION FILMS ON DVD/BLU-RAY

Platforms used to watch content - other devices



QVH4. Thinking about the past 12 months, which of the following platforms have you used to watch the following?

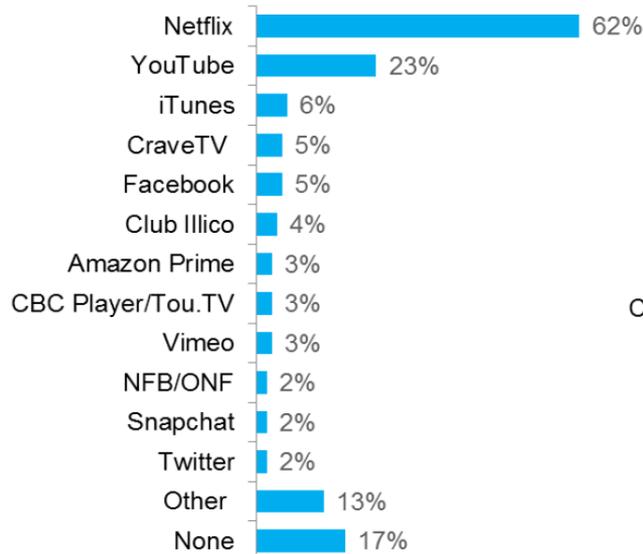
Base: Those who have watched content in the past 12 months, n=Base varies

NETFLIX AND YOUTUBE TOP ONLINE VIEWING PLATFORMS

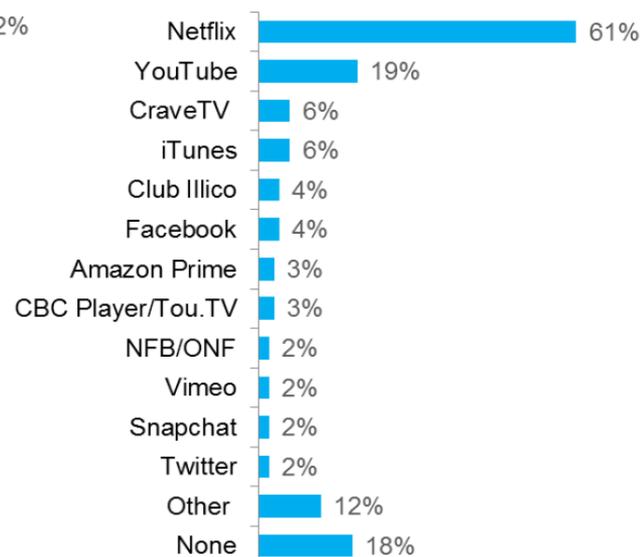
Platforms used to watch films



Platforms used to watch animated movies/feature/full length films



Platforms used to watch live action movies/feature/full length films

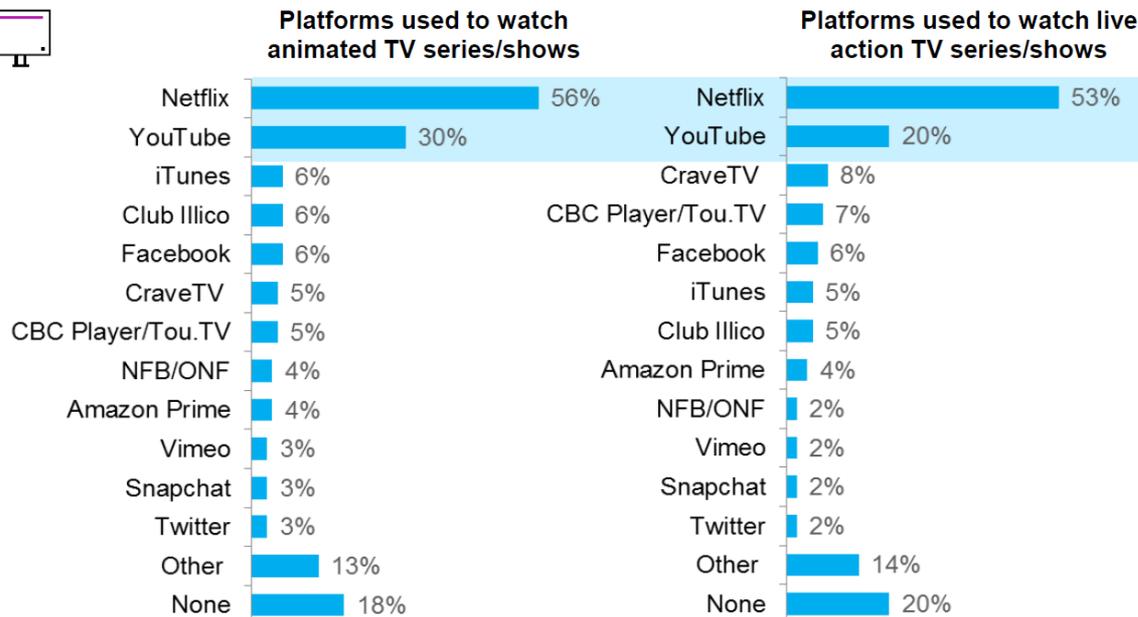


QVH5. Which of the following online platforms have you used to...?

Base: Those who have watched content on online streaming or rental platforms , (animated movies, n=1911; live action movies, n=2128)

NETFLIX AND YOUTUBE TOP ONLINE VIEWING PLATFORMS

Platforms used to watch TV series/shows



QVH5. Which of the following online platforms have you used to...?

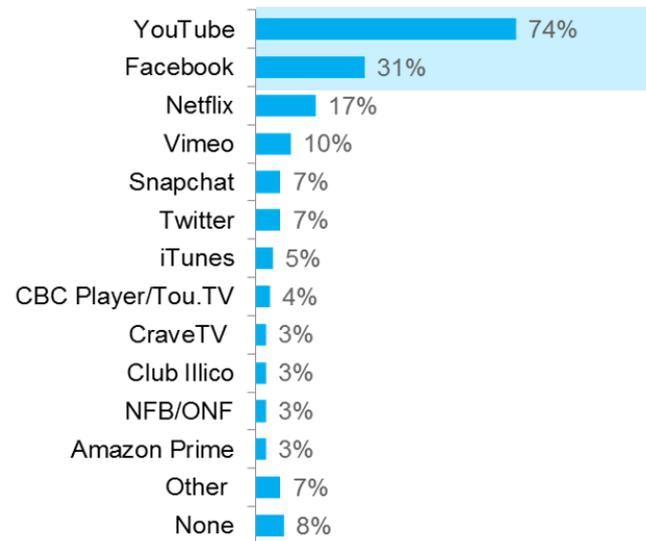
Base: Those who have watched content on online streaming or rental platforms , (Animated tv series, n=1353; Live action TV series, n=1887)

NETFLIX AND YOUTUBE TOP ONLINE VIEWING PLATFORMS

Platforms used to watch non-traditional videos



Platforms used to watch non-traditional video



QVH5. Which of the following online platforms have you used to...?

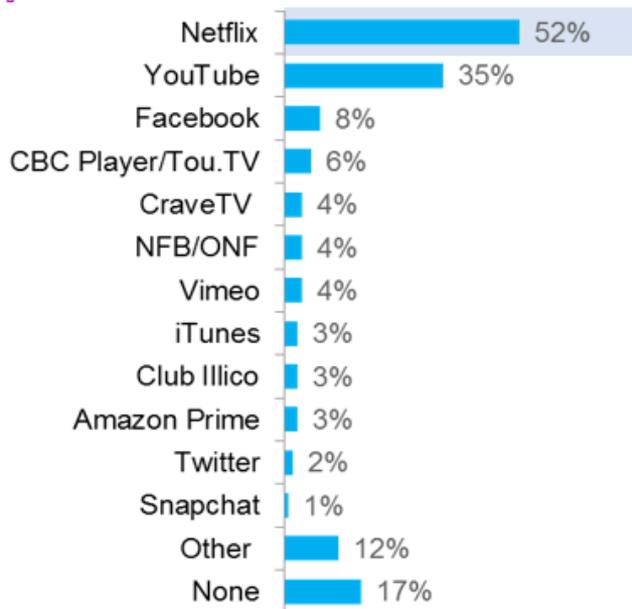
Base: Those who have watched content on online streaming or rental platforms , non-traditional video n=1997

NETFLIX AND YOUTUBE TOP ONLINE VIEWING PLATFORMS

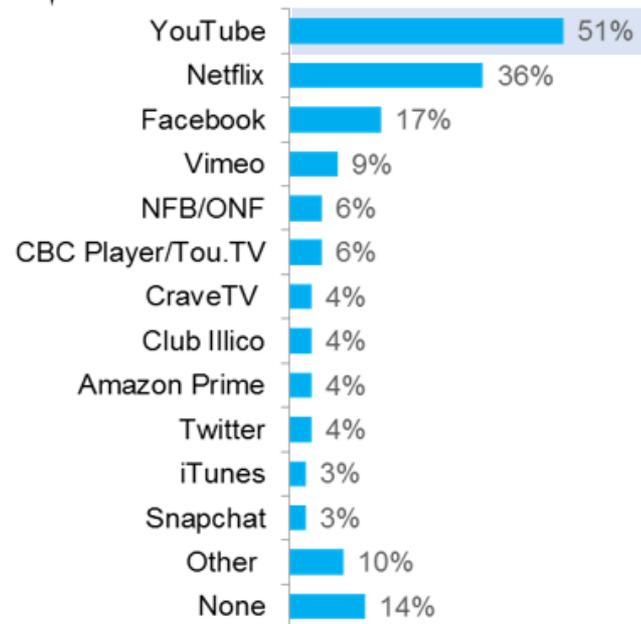
Platforms used to watch documentaries and short films



Platforms used to watch any documentaries



Platforms used to watch any short films

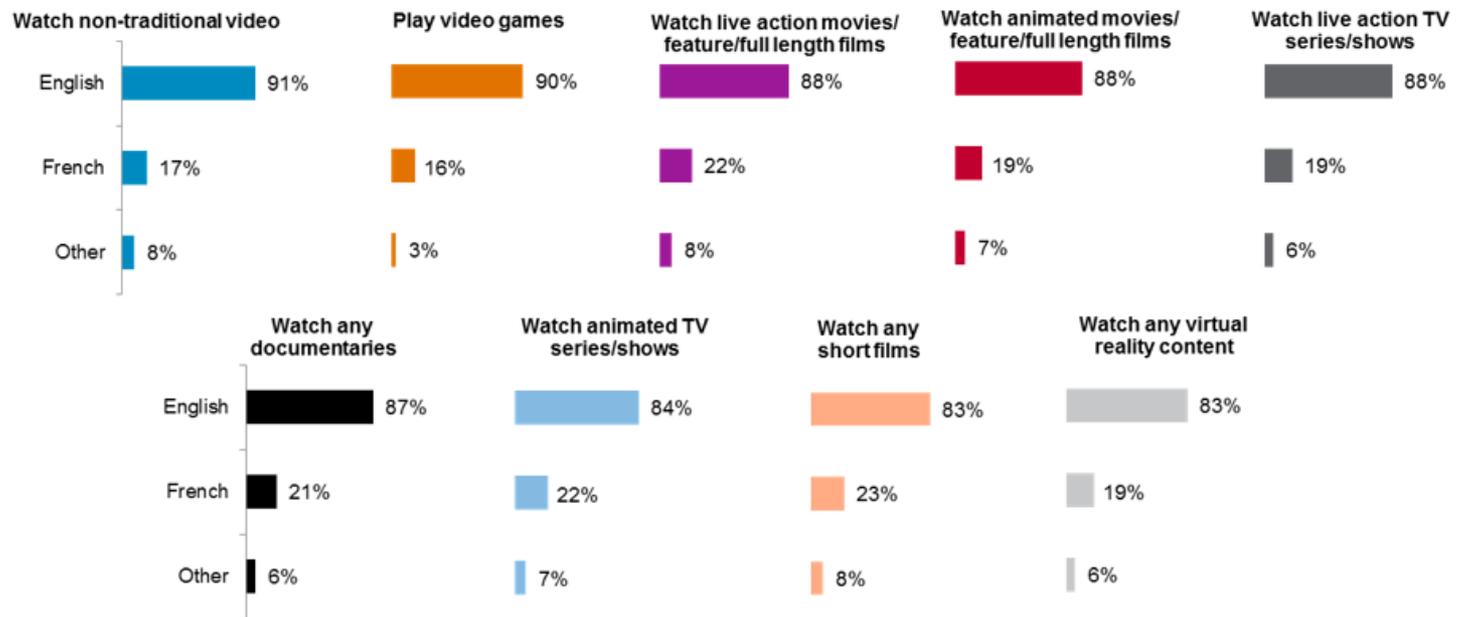


QVH5. Which of the following online platforms have you used to...?

Base: Those who have watched content on online streaming or rental platforms ; documentaries n=1780 short films - n=1059

LANGUAGES CONTENT IS VIEWED IN

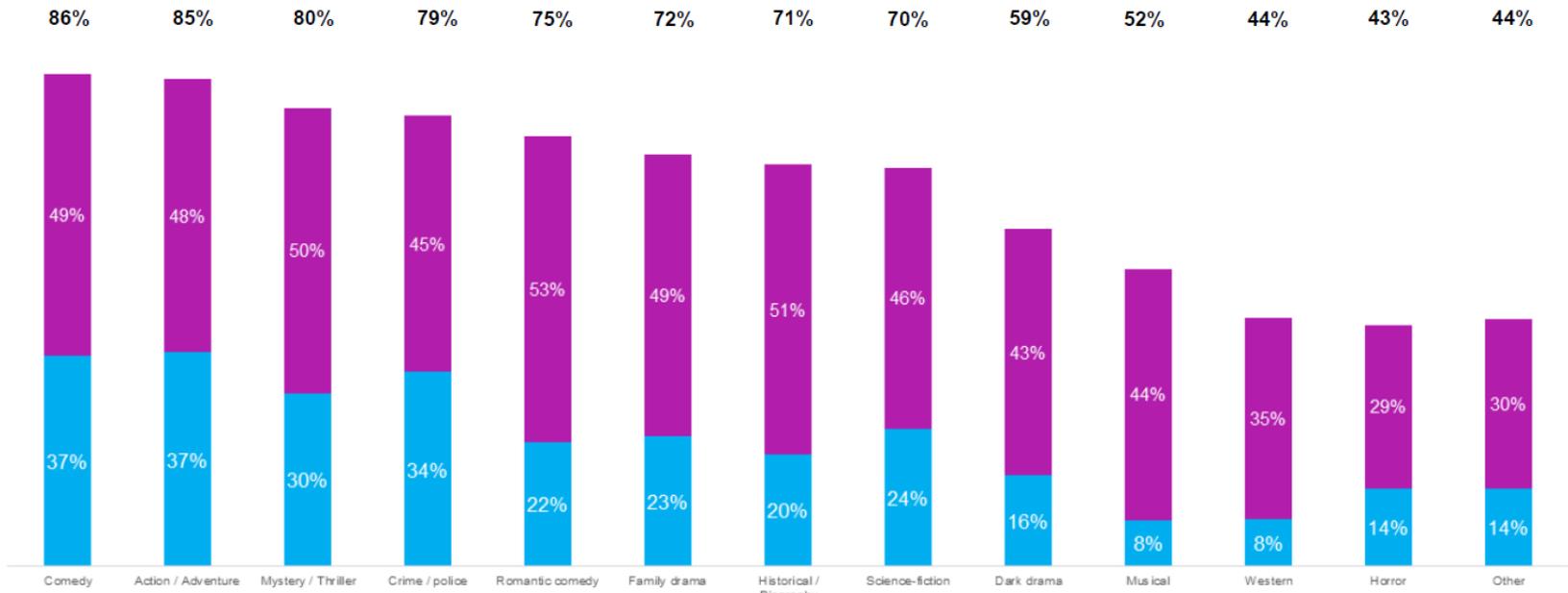
Largely reflective of the Canadian population



QVH6A. Thinking about the past 12 months, in which languages have you watched the following types of content?
 Base: Those who have watched content in the past 12 months, n=Base varies

GENRES PREFERENCES

Genre of movies watched in past 12 months



QVH7. Thinking about the past 12 months, how often would you say you watch the following genre of movies?
 Base: All respondents, n=3009

- Occasionally (1-2 a month or less)
- Regularly (3-4 times a month or more)

WEB SEARCHES - MOST IMPORTANT SOURCE OF INFORMATION

Sources of information used for content

	 Movies - Live Action (n=2,379)	 Movies - Animated (n=1,663)	 TV - Live Action (n=2,379)	 TV - Animated (n=1,663)	 Documentaries (n=2,335)
Web search (Google, Bing, etc.)	44%	43%	38%	37%	36%
YouTube	24%	26%	20%	27%	25%
Recommendations*	29%	24%	25%	20%	20%
Trailers/previews	34%	30%	20%	17%	14%
TV Commercial	21%	17%	20%	15%	12%
User-generated rating websites	23%	22%	14%	15%	10%
Facebook	10%	14%	11%	11%	11%
Emails (Netflix, cinemas, etc.)	14%	14%	12%	12%	10%
Professional reviews	18%	12%	9%	7%	10%

- More than one-quarter of Canadians who have watched animated movies and TV shows in the past 12 months are using YouTube to search for information.
- When looking for information regarding live action movies, besides web searches, many Canadians are using recommendations from family, friends and colleagues, as well as relying on trailers and previews.

QVH8. Thinking about the past 12 months, where did you search for information about the following?

Base: Those who have watched content in the past 12 months, n=Base varies

Responses with <10% not shown

*Recommendations from family/friends/colleagues

WEB SEARCHES - MOST IMPORTANT SOURCE OF INFORMATION

Sources of information used for content

	 Non-traditional video <i>(n=2,290)</i>	 Video games <i>(n=1,421)</i>	 Short Films <i>(n=1,406)</i>	 Virtual Reality <i>(n=693)</i>
Web search (Google, Bing, etc.)	36%	36%	32%	28%
YouTube	43%	23%	29%	25%
Recommendations*	19%	17%	17%	13%
Trailers/previews	12%	11%	13%	10%
Facebook	19%	16%	14%	14%

- When looking for information regarding non-traditional videos and short films many Canadians are likely to use Youtube.
- Facebook, although utilized by less than 1-in-5 Canadians, is most likely used to look for information on non-traditional videos.

QVH8. Thinking about the past 12 months, where did you search for information about the following?

Base: Those who have watched content in the past 12 months, n=Base varies

Responses with <10% not shown

*Recommendations from family/friends/colleagues

KEY FINDINGS: ENGAGEMENT TOWARDS CANADIAN CONTENT

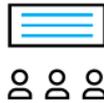
ENGAGEMENT TOWARDS CANADIAN FILMS ON THE RISE

53% of Canadians **watched** a
Canadian movie in the past year

+5 pts *VERSUS 2016*

65% Interested in Canadian
movies

+4 pts *VERSUS 2016*



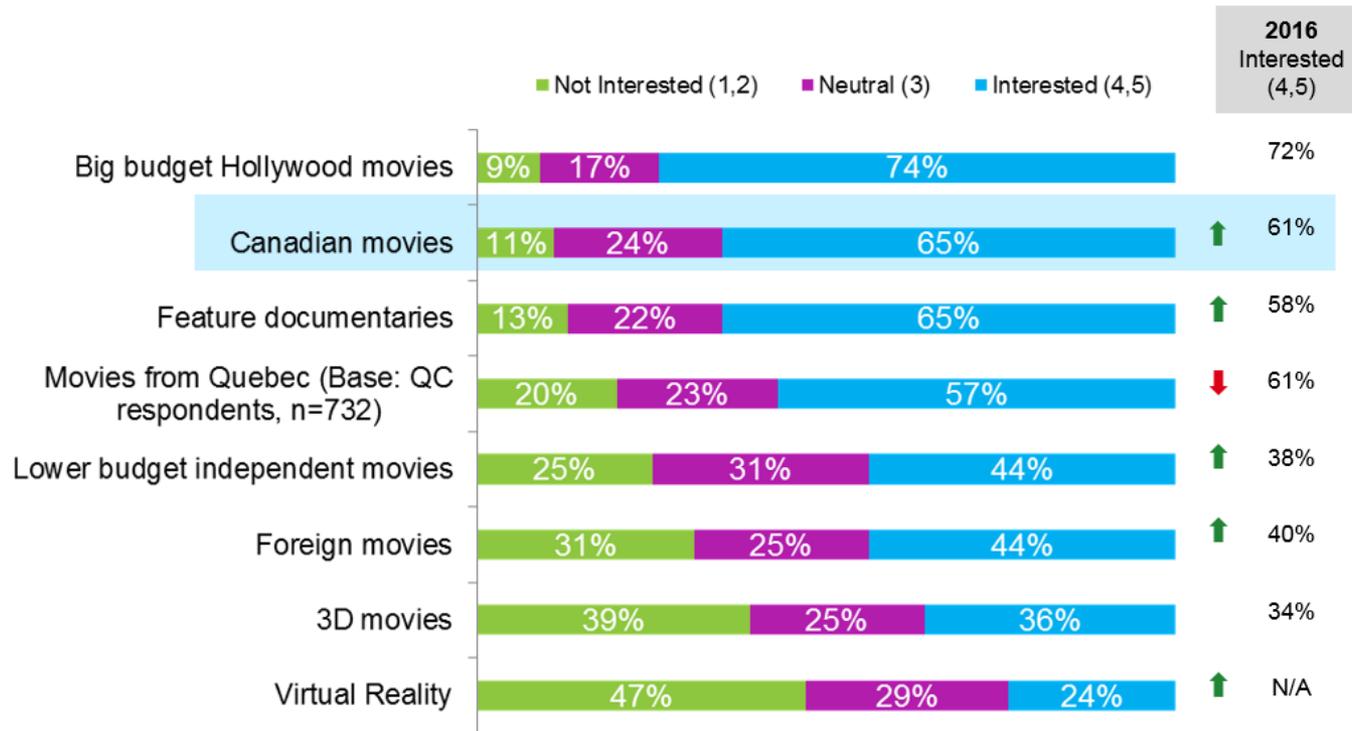
54% of Canadians **can name** a
Canadian movie

+4 pts *VERSUS 2016*

78% of Canadians **agree** that Telefilm
plays an **important role**

+4 pts *VERSUS 2016*

INTEREST IN CANADIAN MOVIES IS UP SIGNIFICANTLY



QDS2. How interested are you in the following types of movies?
Base: All Respondents, n=3009

↑ ↓ Agreement with statements is up/down significantly from 2016

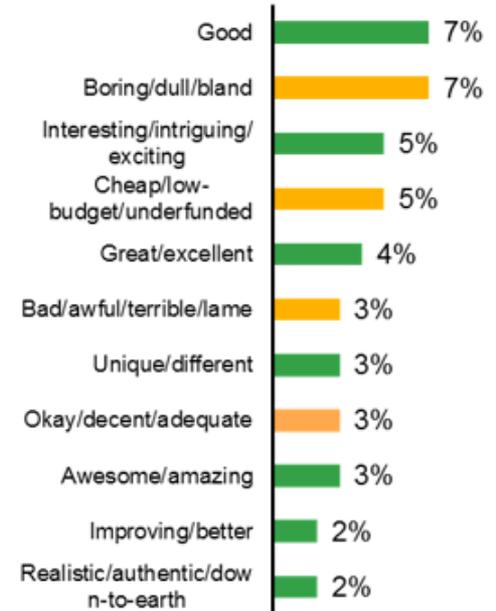
CANADIAN MOVIES LIKELY TO BRING TO MIND POSITIVE SENTIMENTS



+19 pts

NET POSITIVE

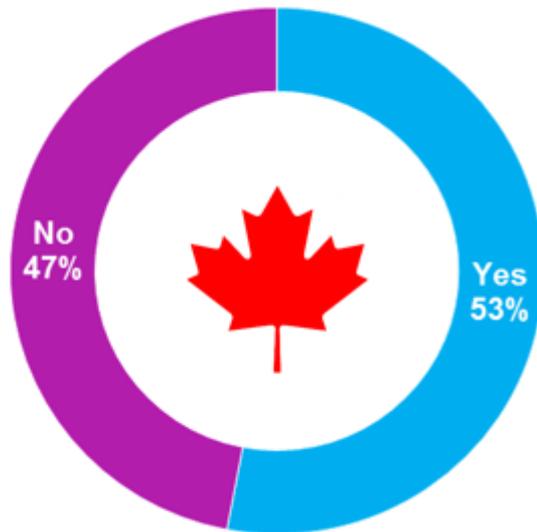
[= % Positive – % Negative mentions]



*Responses <2% not shown

QCC1. Thinking about Canadian movies, how would you describe them in one word?
Base: All Respondents, n=3009

CANADIANS WHO HAVE WATCHED A CANADIAN MOVIE UP IN 2017



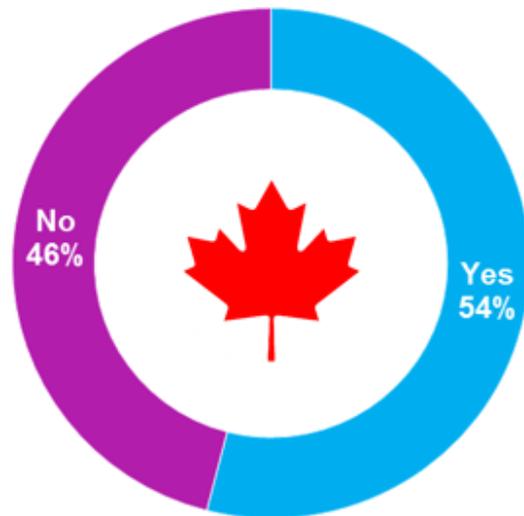
+5 pts

Vs 2016

QCC3. Have you watched a Canadian movie in the past year?
Base: All Respondents, n=3009

CANADIAN MOVIE RECOGNITION ON THE RISE IN 2017

Whether or not respondents can name a Canadian movie



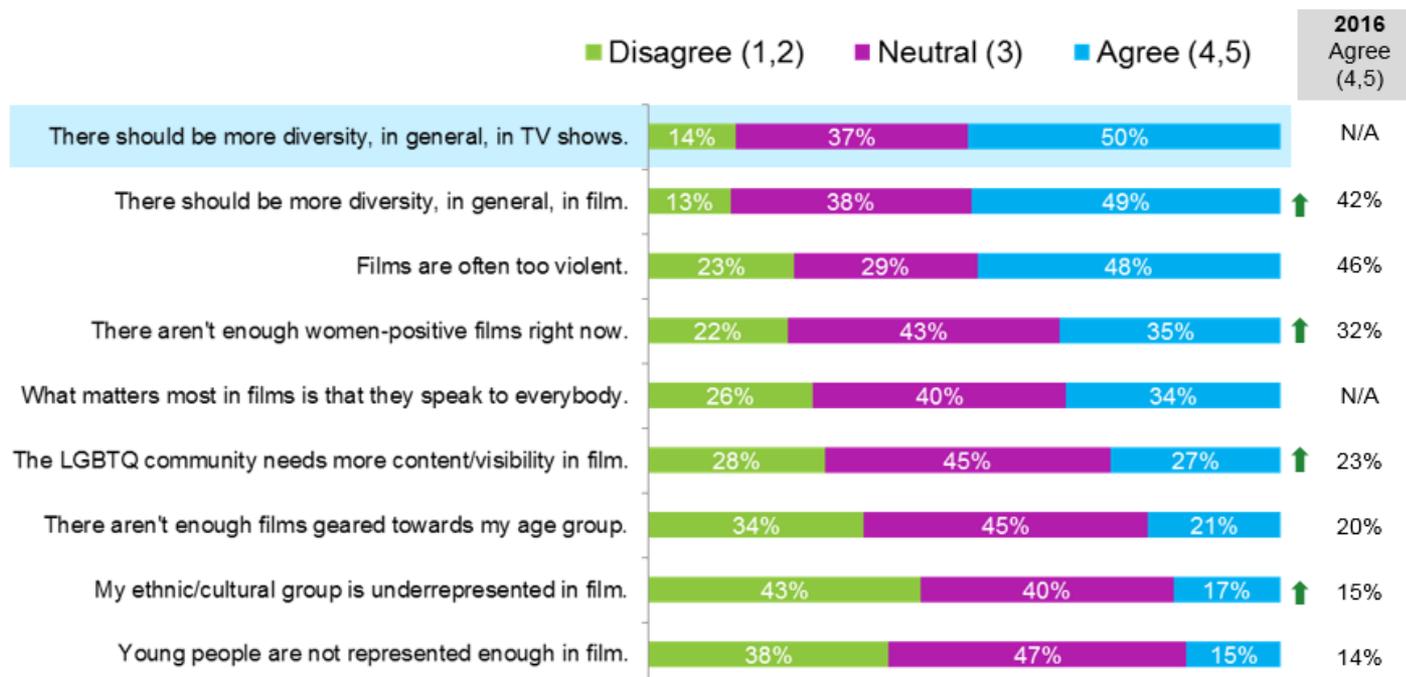
+4 pts

Vs 2016

QCC2. Can you name a Canadian movie?
Base: All Respondents, n=3009

DIVERSITY IN CONTENT

Roughly half of Canadians agree there should be more diversity in film and TV

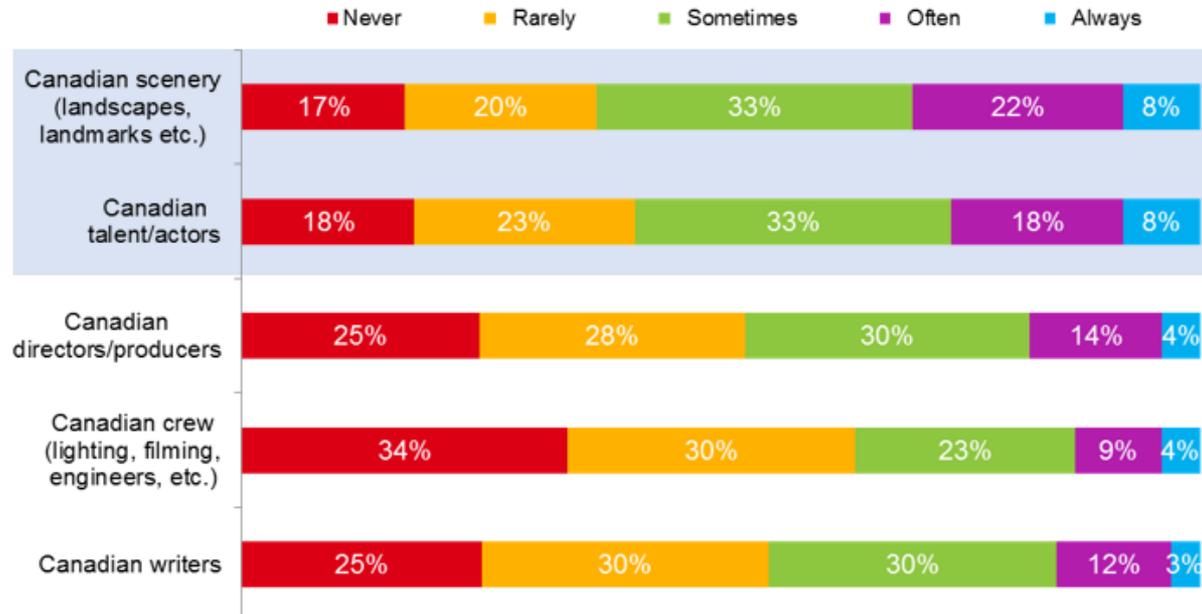


QDS1. Thinking about films and TV shows in general, please select to what extent you agree or disagree with the following statements
 Base: All Respondents, n=3009

↑ Agreement with statements is up significantly from 2016

ELEMENTS SOUGHT OUT IN CANADIAN MOVIES

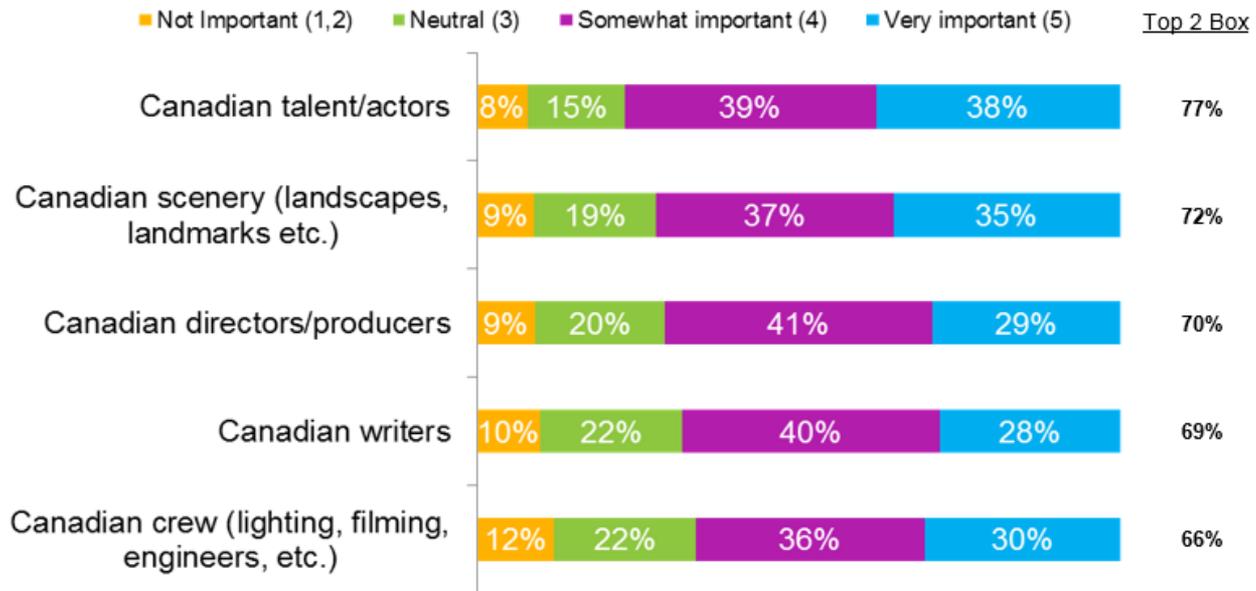
Frequency of seeking out Canadian elements when looking for a movie to watch



QCC5. When you are looking for a movie to watch, how often do you seek out the following Canadian elements?
Base: All Respondents, n=3009

CANADIAN MOVIE ELEMENTS

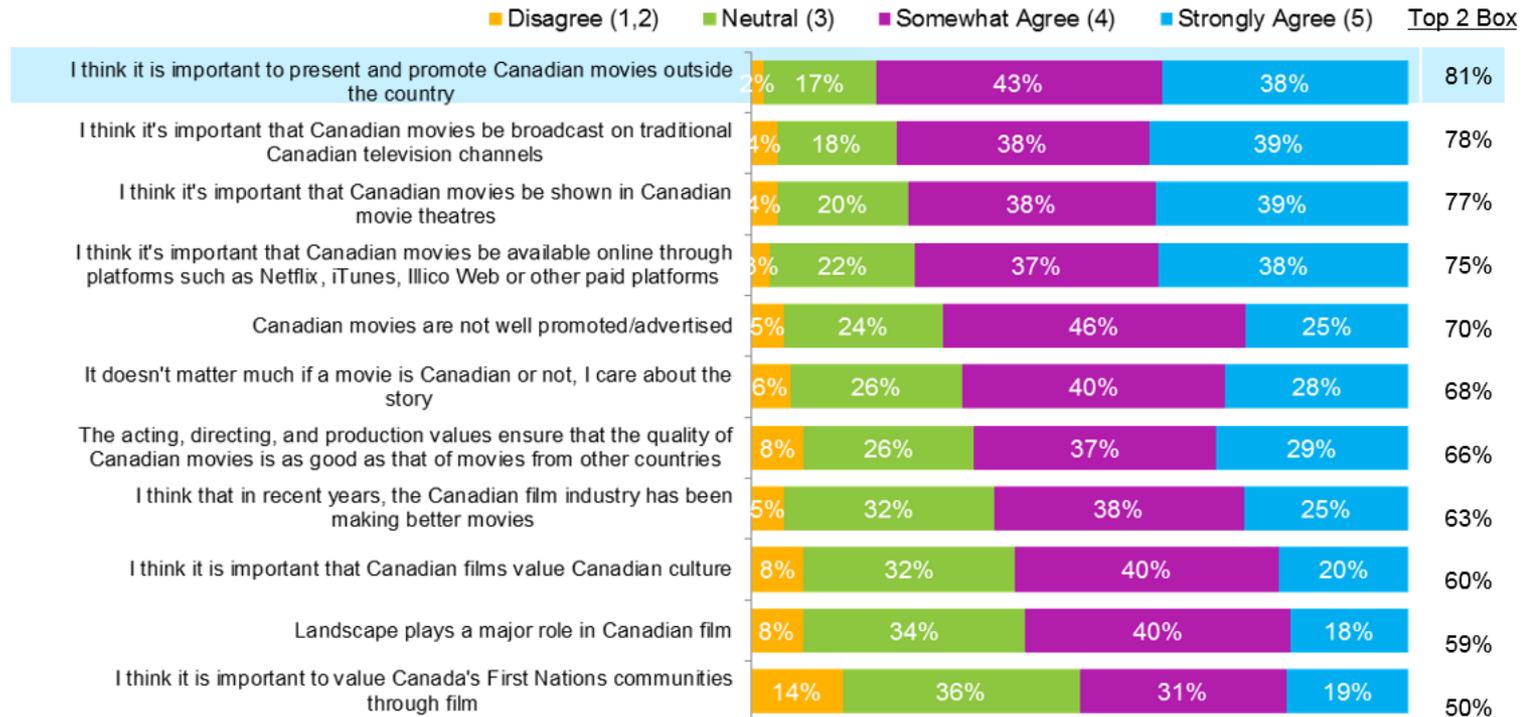
Over two-thirds of Canadians find all of the listed Canadian elements to be important



QCC6. How important do you think it is that a Canadian movie contain the following Canadian elements?
 Base: All Respondents, n=3009

IT IS MOST IMPORTANT TO PROMOTE CANADIAN FILMS INTERNATIONALLY

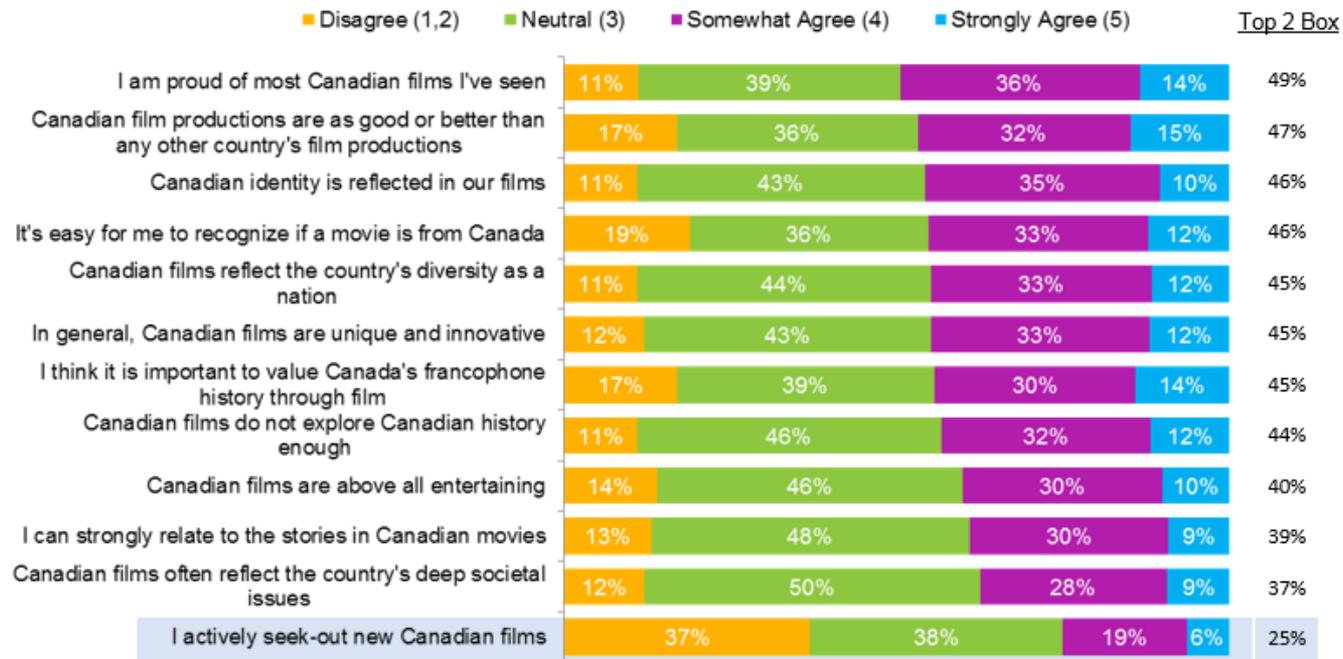
Canadians' agreement with statements about Canadian movies



QCC7. Thinking about Canadian films specifically, please select to what extent you agree or disagree with the following statements.
Base: All Respondents, n=3009

25% OF CANADIANS AGREE THEY ACTIVELY SEEK-OUT CANADIAN FILMS

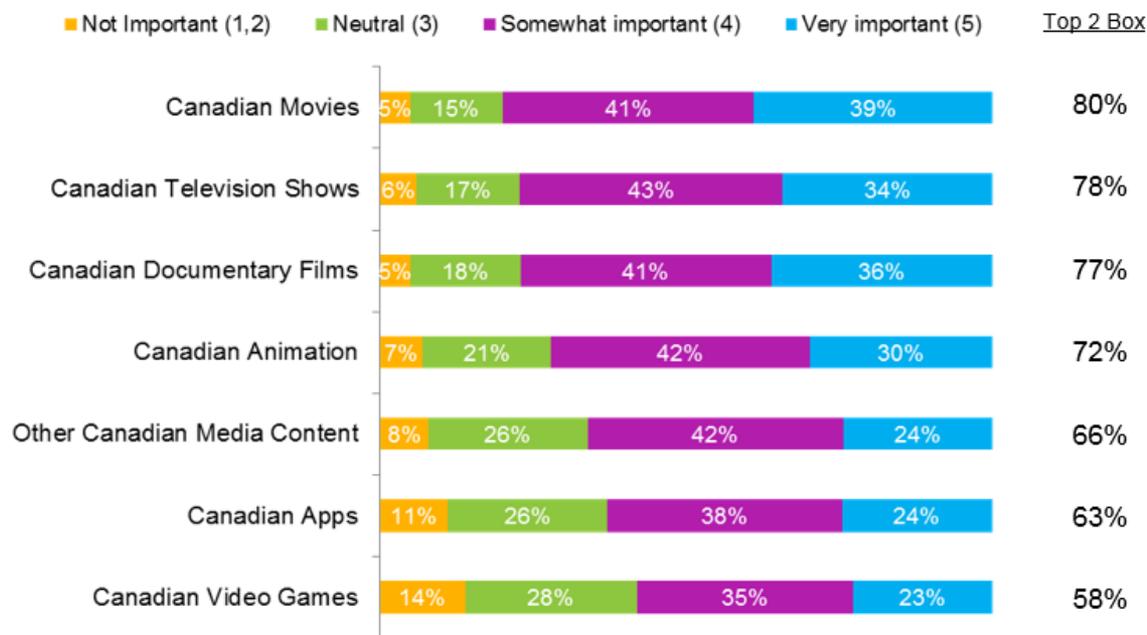
Agreement with statements about Canadian movies



QCC7. Thinking about Canadian films specifically, please select to what extent you agree or disagree with the following statements.
Base: All Respondents, n=3009

PROMOTING CANADIAN CONTENT

The majority of Canadians think promoting Canadian content is important

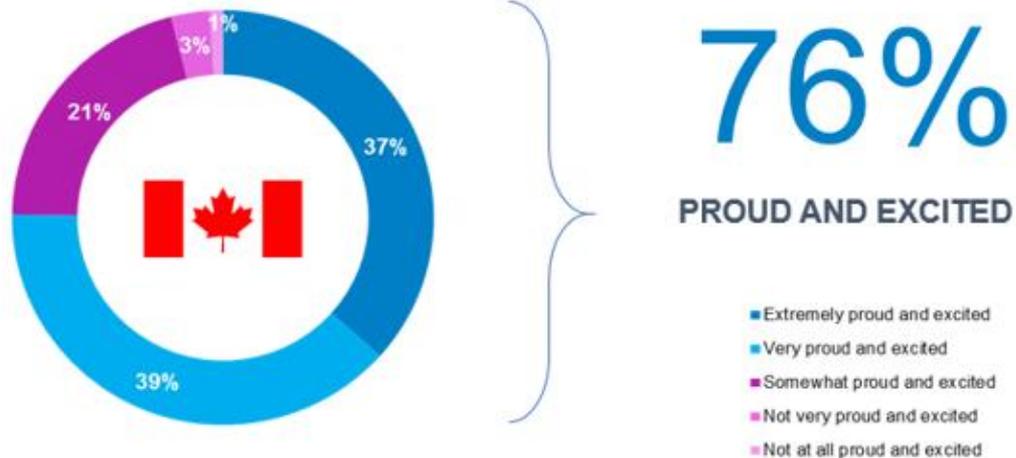


QTF7. In your opinion, how important is to promote each of the following as being made and/or produced in Canada?
Base: All Respondents, n=3009

KEY FINDINGS: CANADIAN PRIDE

CANADIAN PRIDE

Canadians are proud when Canadian talent & content is celebrated internationally



QCP2. How proud and excited are you when Canadian talent is celebrated internationally?
Base: All respondents, n=3009

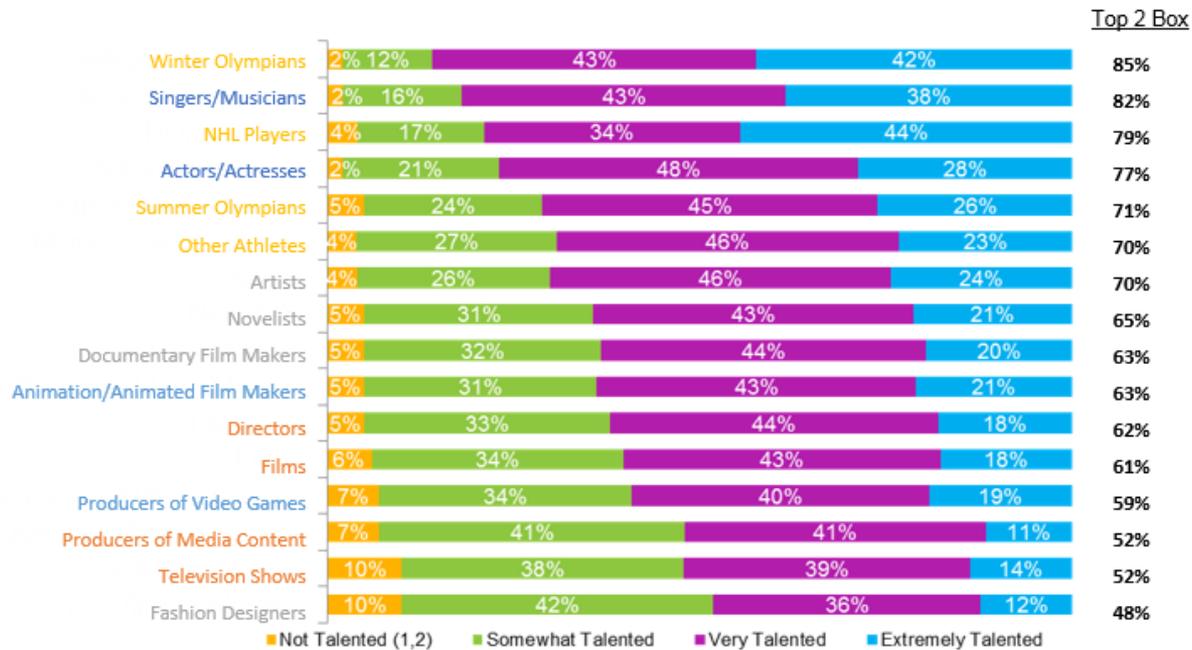
CANADIAN TALENT

Canadian talent and content is viewed in five distinct categories



KEY FILM TALENT IS SEEN TO BE AMONG THE MOST TALENTED

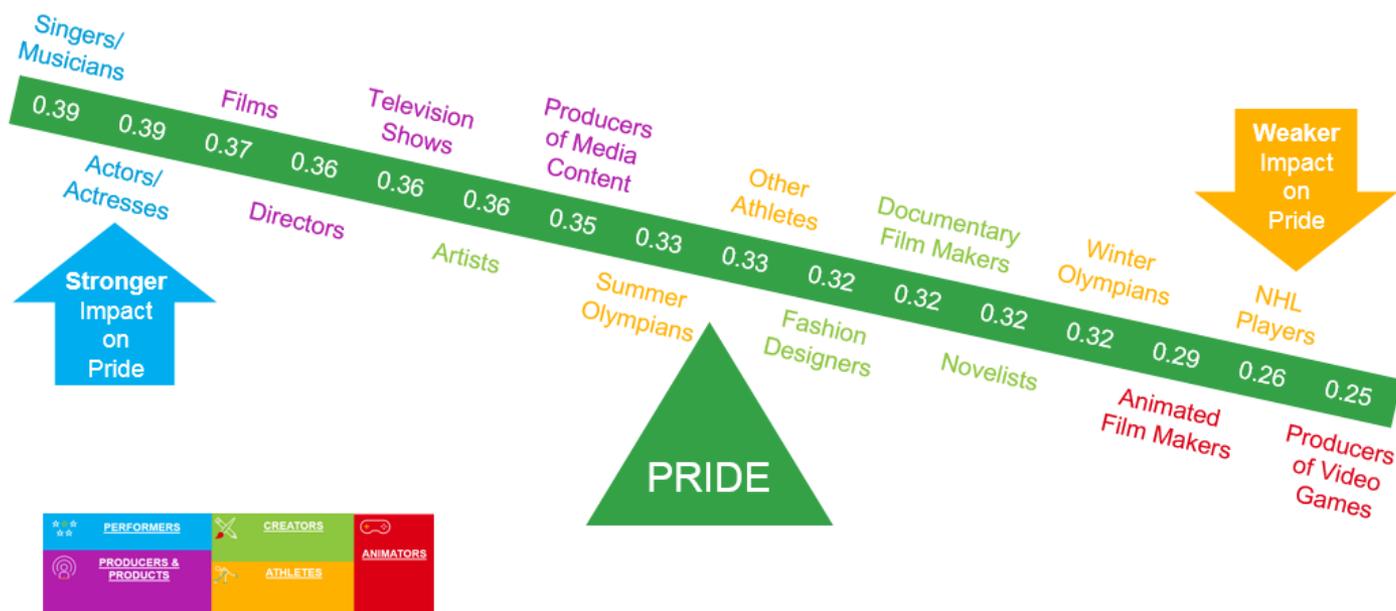
Level of talent possessed by Canadian talent and content



QCP1. In general how would you rate the level of talent possessed by each of the following Canadian talent or produced content?
 Base: All respondents, n=3009

DRIVERS OF PRIDE

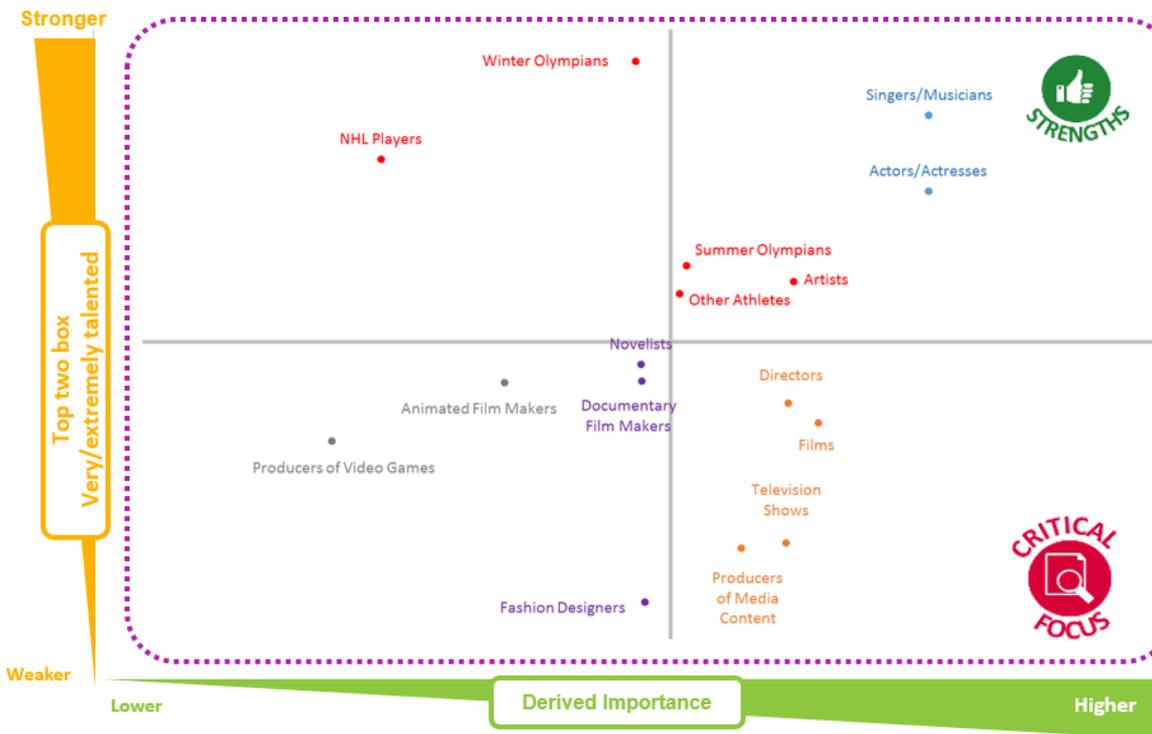
Key film talent considered among the most talented and top drivers of pride



Note: Values within the scale represent their correlation scores when measures for talent rated are compared to pride. Values higher on the scale indicate a stronger impact on pride.

PROMOTING PRODUCERS AND PRODUCTS INTERNATIONALLY

Opportunity: direct focus towards promoting producers and products internationally



STRENGTHS

Categories that Canadians agree are talented, and drive Pride among Canadians.

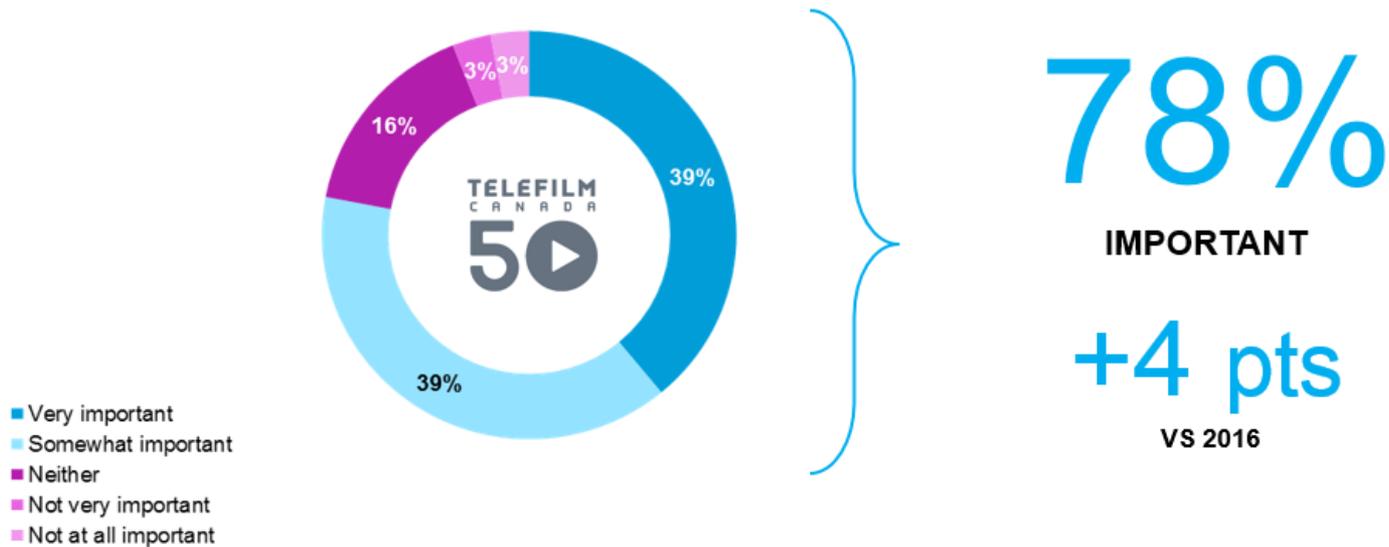
CRITICAL FOCUS

Categories that Canadians agree are less talented, but still drive Pride among Canadians.

*Categories that fall under strengths and critical focus are both key drivers in Canadians' pride for Canadian talent

THE ROLE OF TELEFILM CANADA

The percentage of Canadians who agree that Telefilm Canada plays an important role is up four points versus 2016

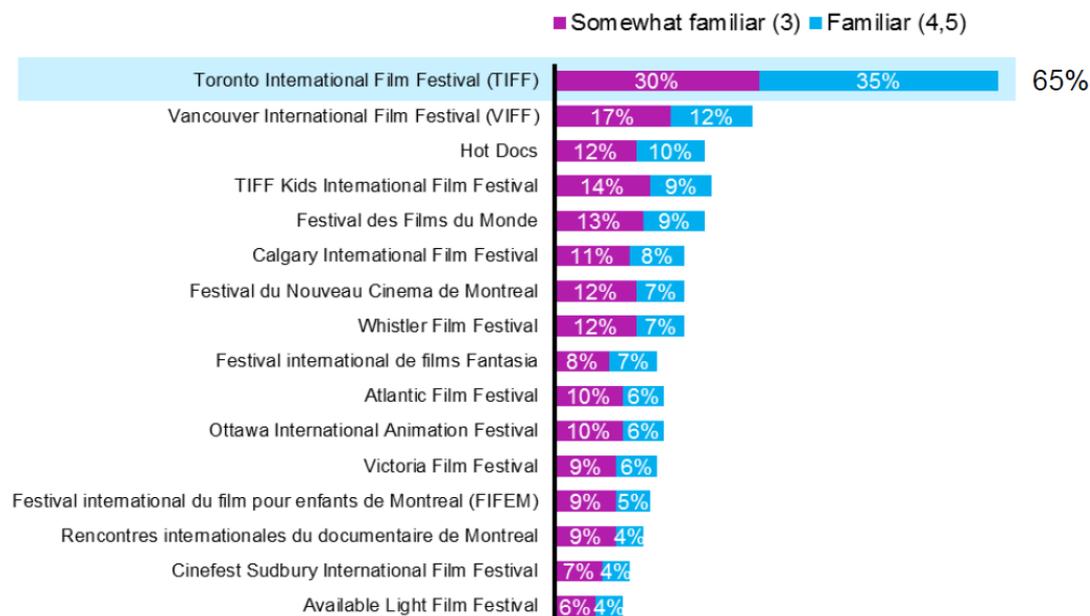


QTF2. Telefilm provides financial support for the private sector to create distinctively Canadian productions that appeal to domestic and international audiences. In your opinion, how important is this role?
Base: All Respondents, n=3009

KEY FINDINGS: FILM FESTIVALS AND AWARDS

CANADIAN FILM FESTIVALS

Familiarity with Canadian film festivals

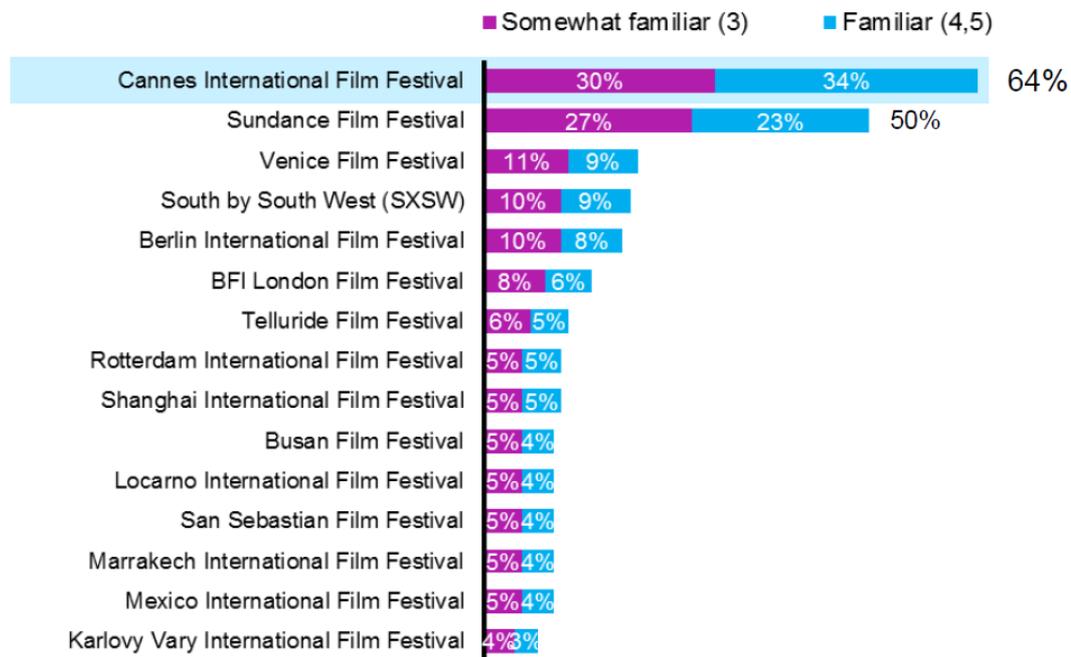


QFA2. How familiar are you with each of the following Canadian film festivals?

Base: All Respondents, n=3009

INTERNATIONAL FILM FESTIVALS

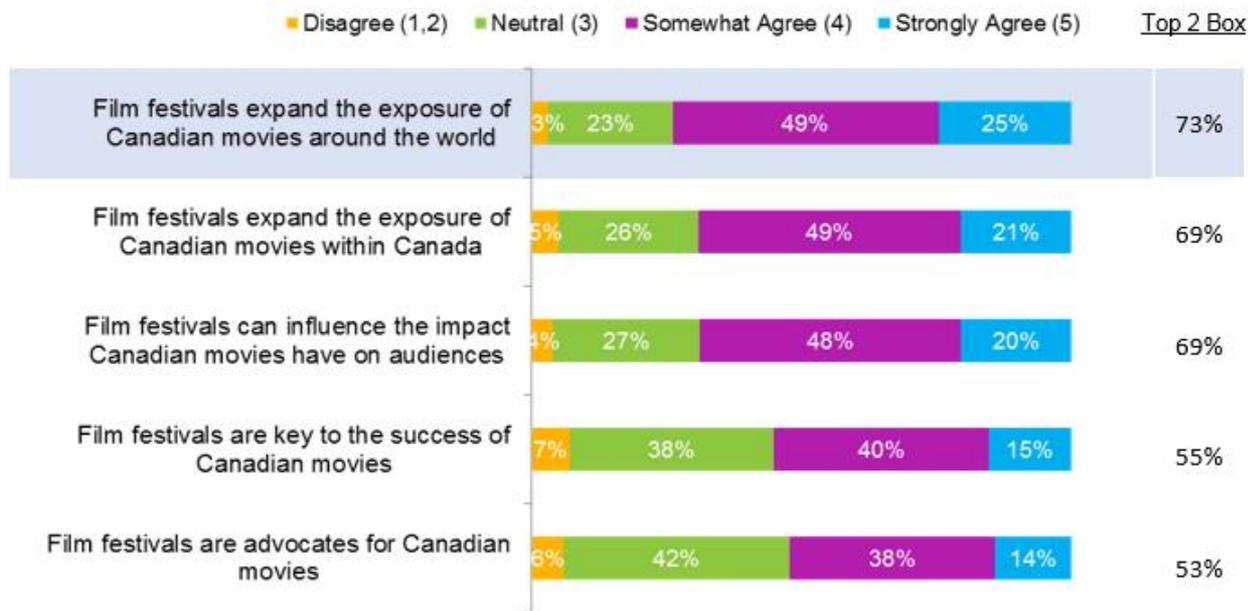
Familiarity with international film festivals



QFA3. How familiar are you with each of the following international film festivals?
 Base: All Respondents, n=3009

FILM FESTIVALS AND EXPOSURE

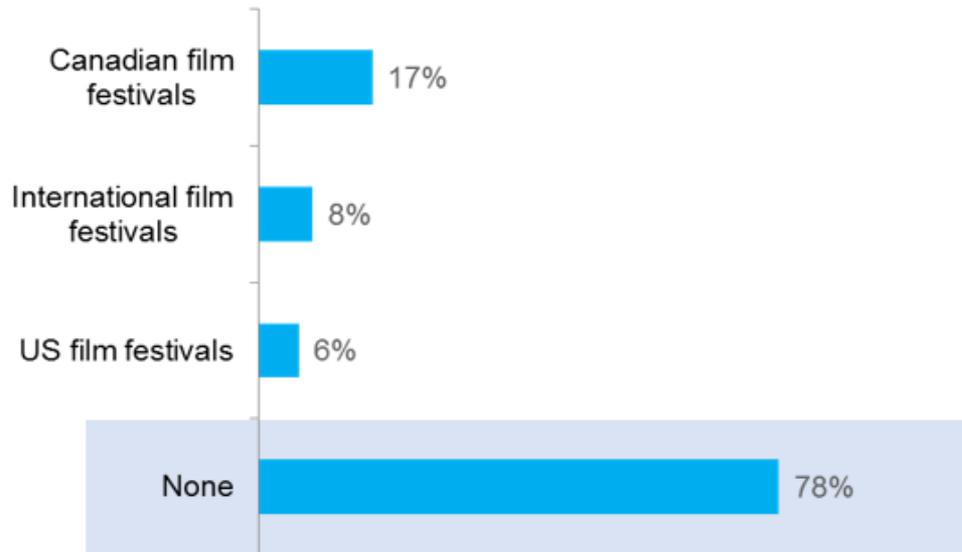
Almost ¾ of Canadians agree film festivals expand exposure



QFA4. To what extent do you agree with the following statements with respect to film festivals?
Base: All Respondents, n=3009

FILM FESTIVALS AND CANADIANS

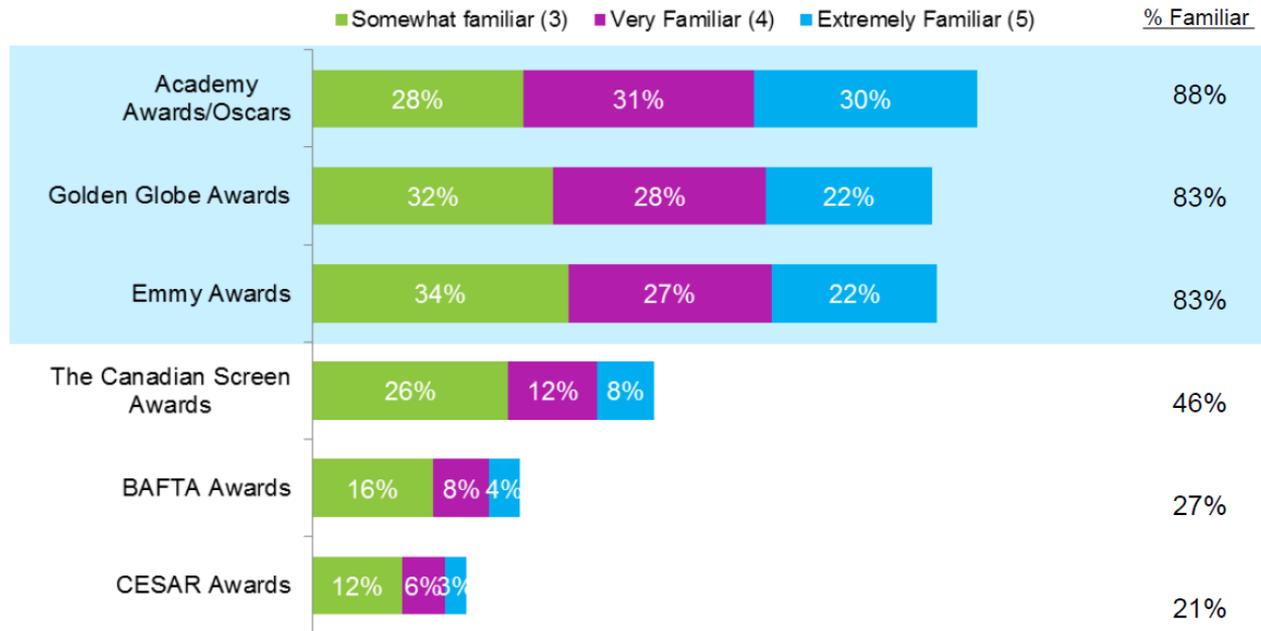
Almost 8-in-10 Canadians do not follow or attend any film festivals



QFA4A. Do you personally follow or attend any film festivals in the following categories?
Base: All Respondents, n=3009

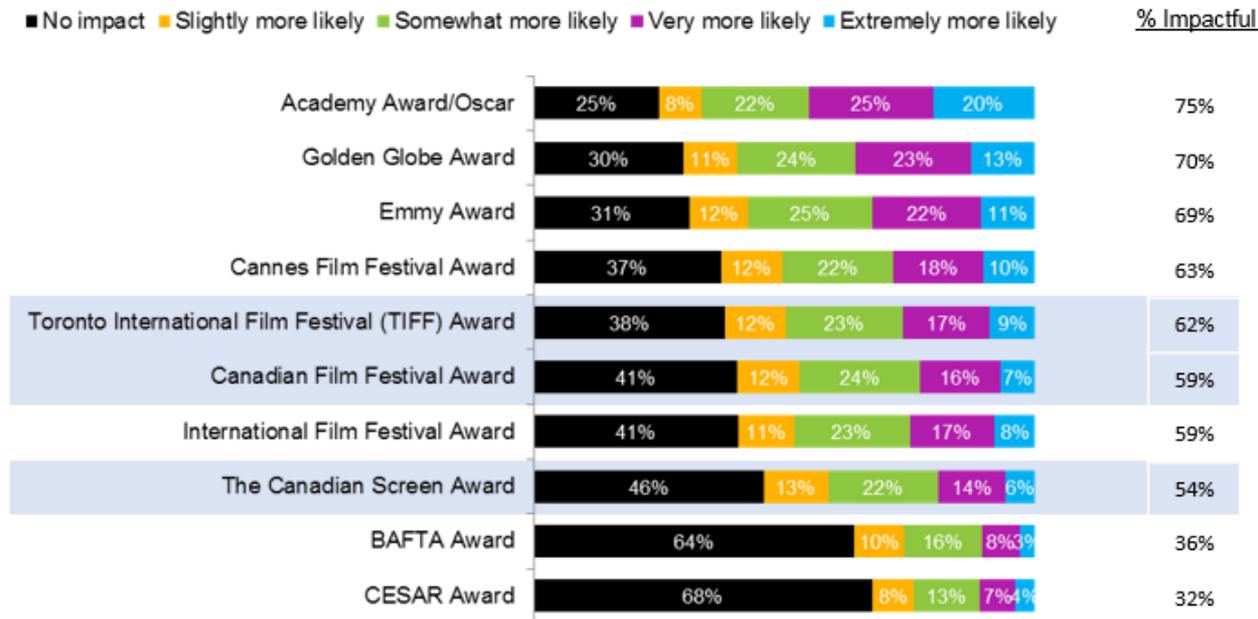
AWARD SHOWS

Familiarity with national and international award shows



QFA6. How familiar are you with each of the following movie and/or television awards shows and contests?
 Base: All Respondents, n=3009

AWARDS IMPACT ON LIKELIHOOD TO WATCH CONTENT



QFA7. What impact does winning the following awards or festivals have on your likelihood to watch a movie and/or television show?
Base: All Respondents, n=3009

RESEARCH INFORMATION

METHODOLOGY

Nielsen conducted an online survey among Canadians aged 15 years and over to assess their media consumption habits, behaviour and attitudes.

The survey was in field between May 2 and May 18, 2017.

The survey took an average of 24 minutes to complete.

A total of 3,009 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.

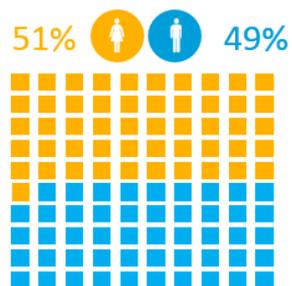
Age Quotas	Quotas	Completes
15-34	900	851
35-54	1,200	1,223
55+	900	935
Total Completes	n=3,000	n=3,009

Gender Quotas	Quotas	Completes
Male	1,500	1,503
Female	1,500	1,506
Total Completes	n=3,000	n=3,009

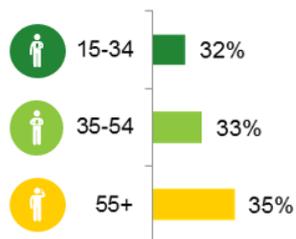
Regional Quotas	Quotas	Completes
BC	375	372
Alberta	300	310
Manitoba/ Sask.	300	264
Ontario	975	1,019
Quebec	750	732
Atlantic	300	312
Total	n=3,000	n=3,009

DEMOGRAPHICS

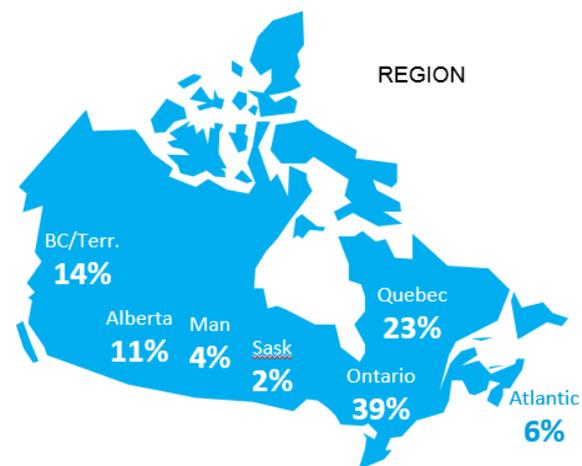
GENDER



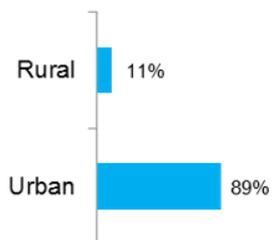
AGE GROUPS



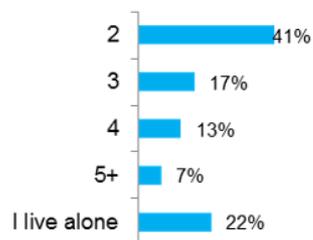
REGION



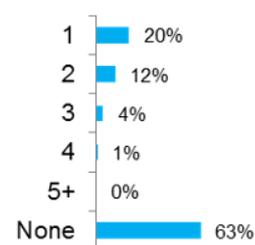
REGION



HOUSEHOLD



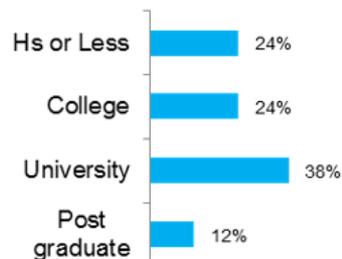
HOUSEHOLD (UNDER 18)



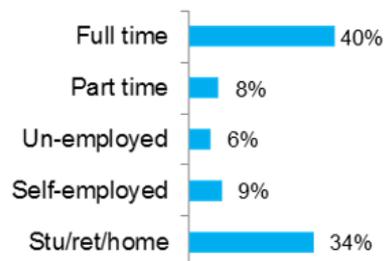
Base: All Respondents, n=3009

DEMOGRAPHICS

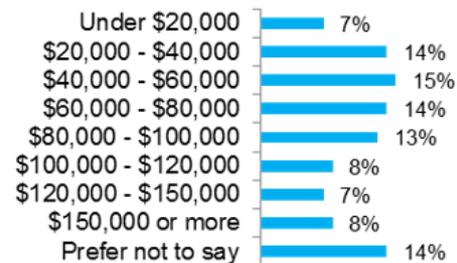
EDUCATION



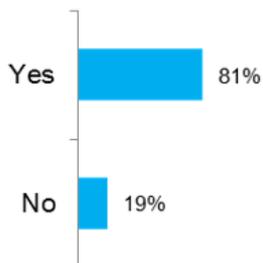
EMPLOYMENT



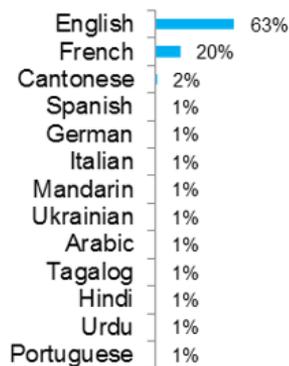
INCOME



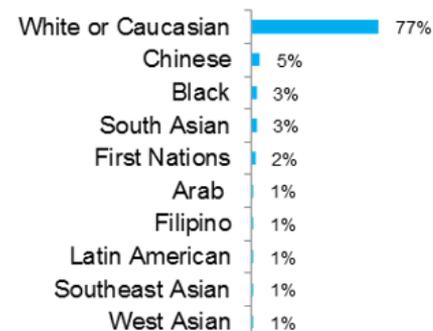
BORN IN CANADA



MOTHER TONGUE



ETHNICITY



Base: All Respondents, n=3009

TELEFILM 50
C A N A D A 