

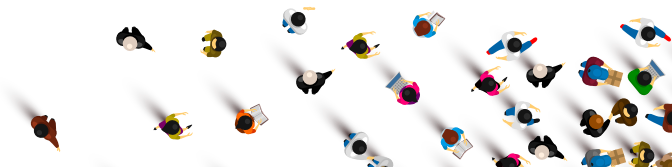
# How Canadians see contributions to Canada in the film and TV sector

- Nation wide survey for Motion Picture Association - Canada
- August 2023, Sample, 3000 adults in Canada, online
- Prepared by: Bruce Anderson and Alex Kohut
- Field work by Abacus Data



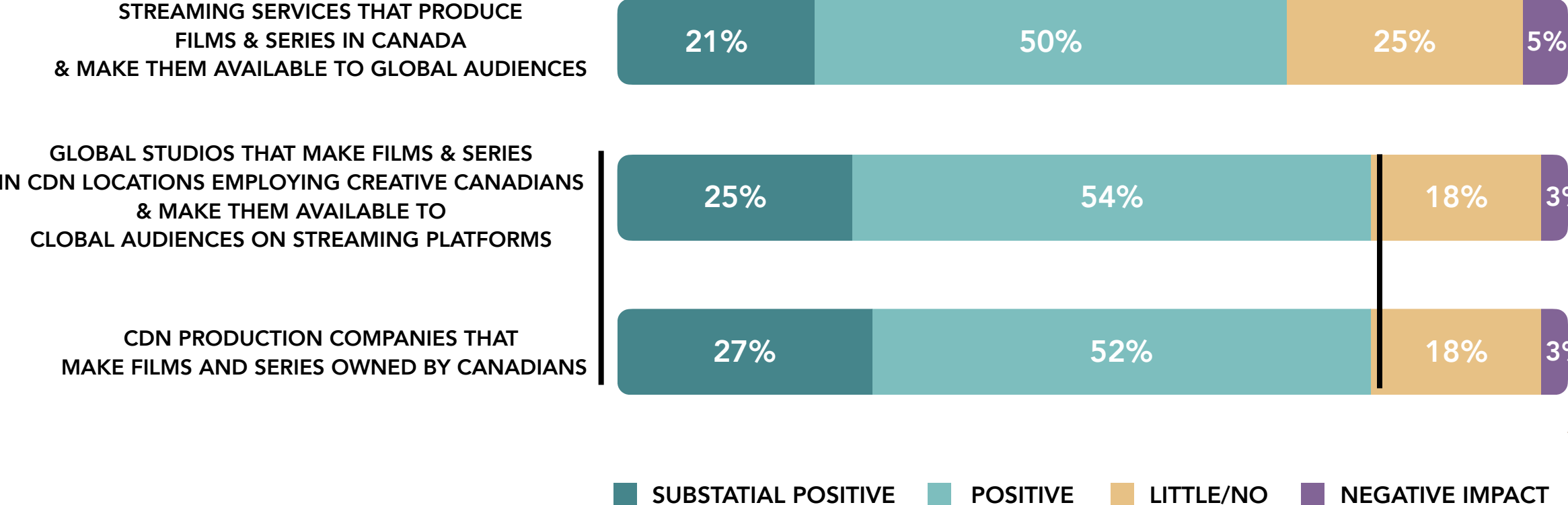
# Key Findings

- Canadians value the contributions of global studio and streaming companies that make films and series in Canada, using Canadian creative talent, and sharing that content with the world on streaming services.
- Most Canadians do not place a higher value on productions owned by Canadian companies. They appreciate both: global studio and streaming productions made in Canada and Canadian owned films and series.



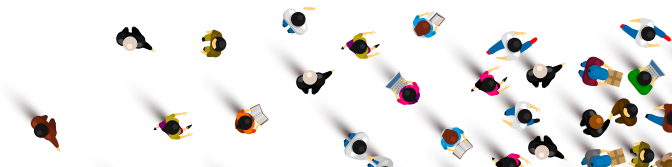
# Is this type of film and TV work a contribution to Canada?

DO YOU BELIEVE THESE MAKE A POSITIVE CONTRIBUTION TO CANADA?



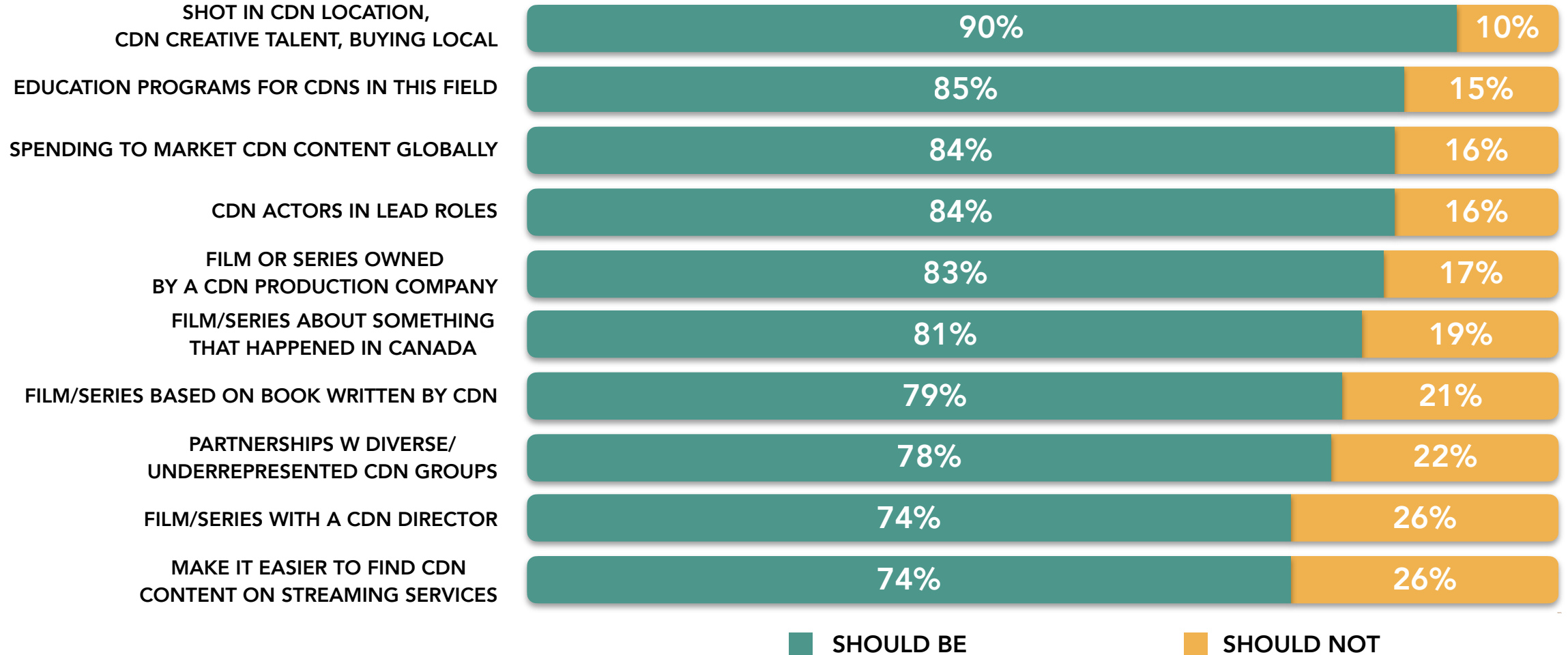
# Key Findings

- Canadians see many different contributions that these companies could make which would be valuable for the country and our creative workers. Among the top ranked ideas were shooting in Canada, employing Canadians, buying local, as well as spending to market internationally, education programs for Canadians who want to be in the field.
- The lowest valued item on the list was “making it easier to find Canadian content on streaming services”.
- Canadian ownership of a film or series was in the middle of a pack and equivalent to other ways to contribute.



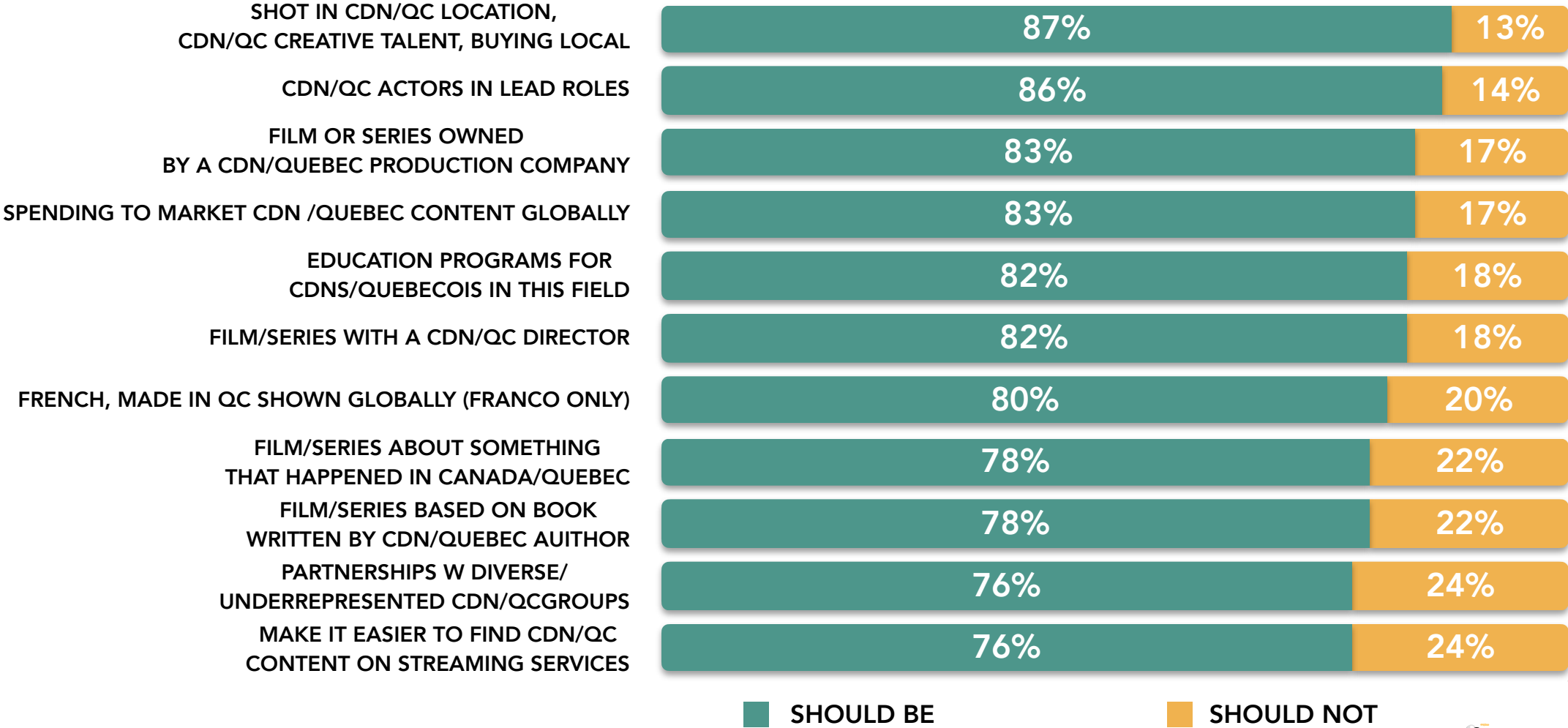
# If streaming companies are allowed to make choices about their contribution to Canada's goals, should these be considered valuable?

IF STREAMING COMPANIES ARE ALLOWED TO MAKE CHOICES ABOUT HOW BEST TO SUPPORT CANADA'S GOALS IN FILM AND TV SHOULD THESE BE CONSIDERED VALUABLE OR NOT



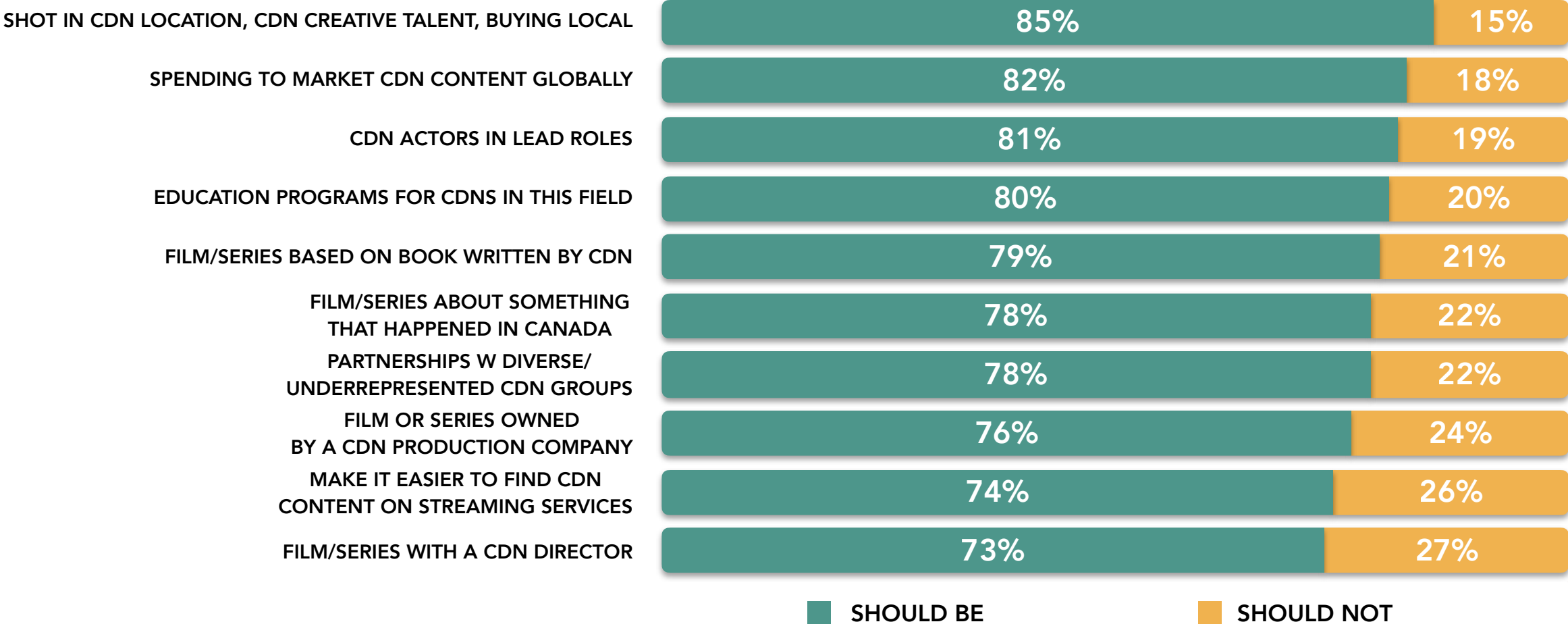
# If streaming companies are allowed to make choices about their contribution to Canada's goals, should these be considered valuable? Francophones only

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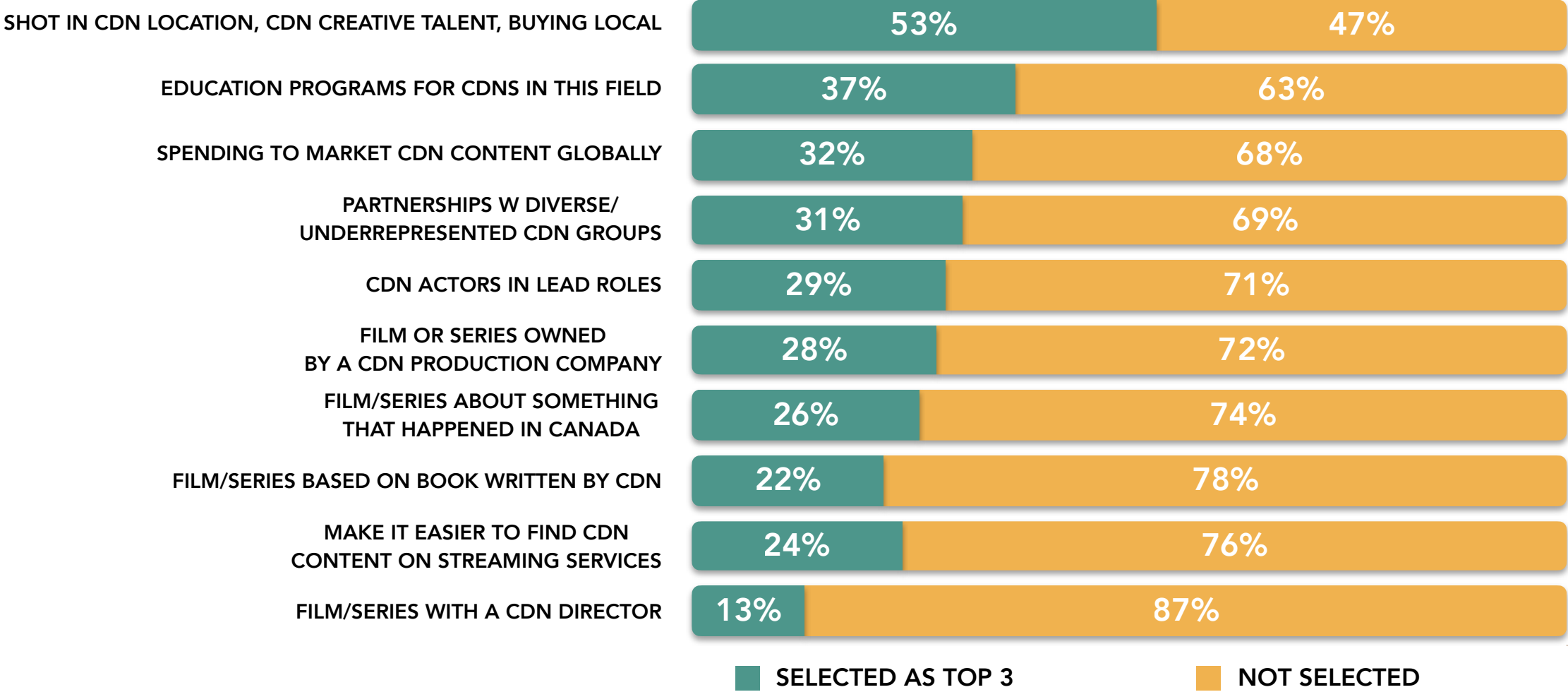
# If streaming companies are allowed to make choices about their contribution to Canada's goals, should these be considered valuable? Under 30 only

IF STREAMING COMPANIES ARE ALLOWED TO MAKE CHOICES ABOUT HOW BEST TO SUPPORT CANADA'S GOALS IN FILM AND TV SHOULD THESE BE CONSIDERED VALUABLE OR NOT



# Which are the three most valuable ways these companies can contribute?

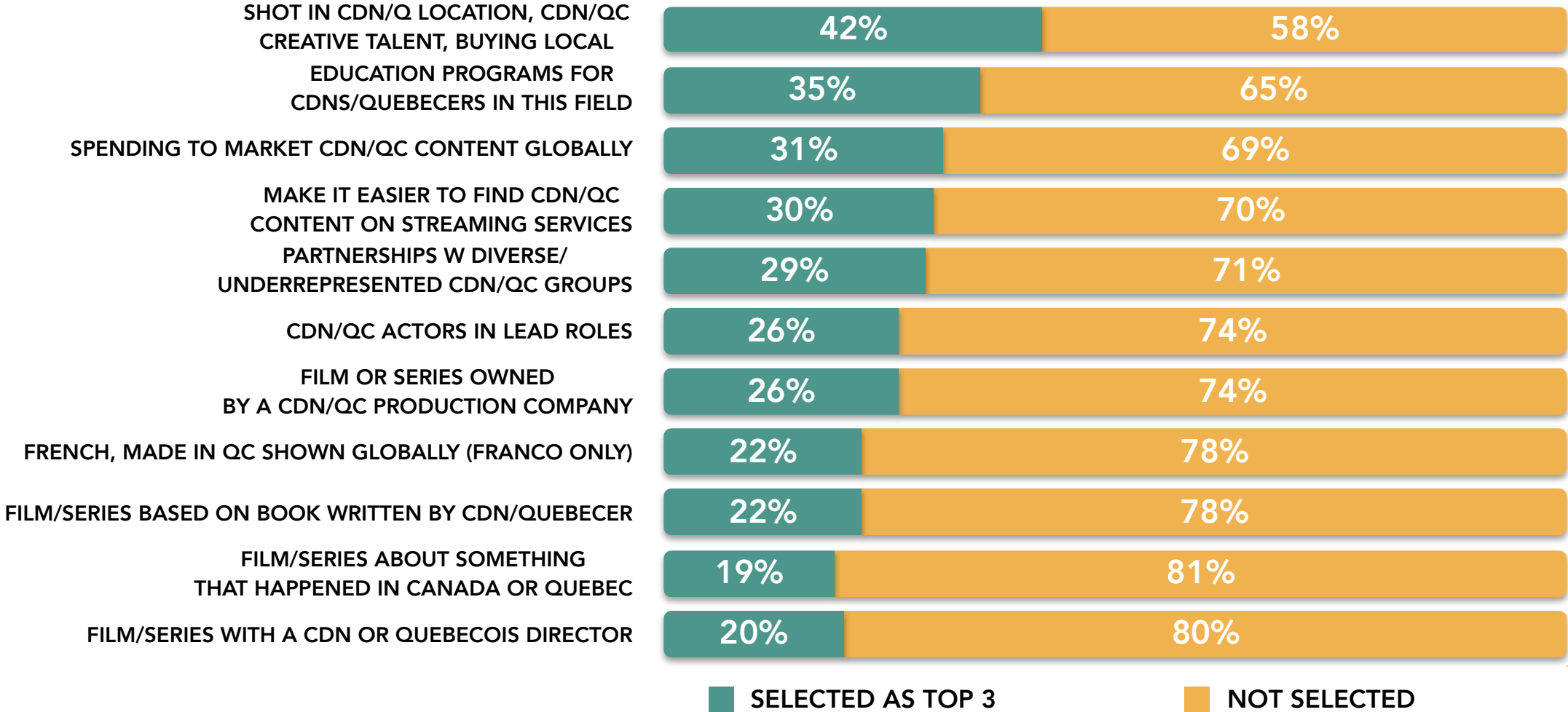
WHICH THREE DO YOU THINK ARE THE MOST VALUABLE WAYS THESE COMPANIES CAN CONTRIBUTE TO CANADA?





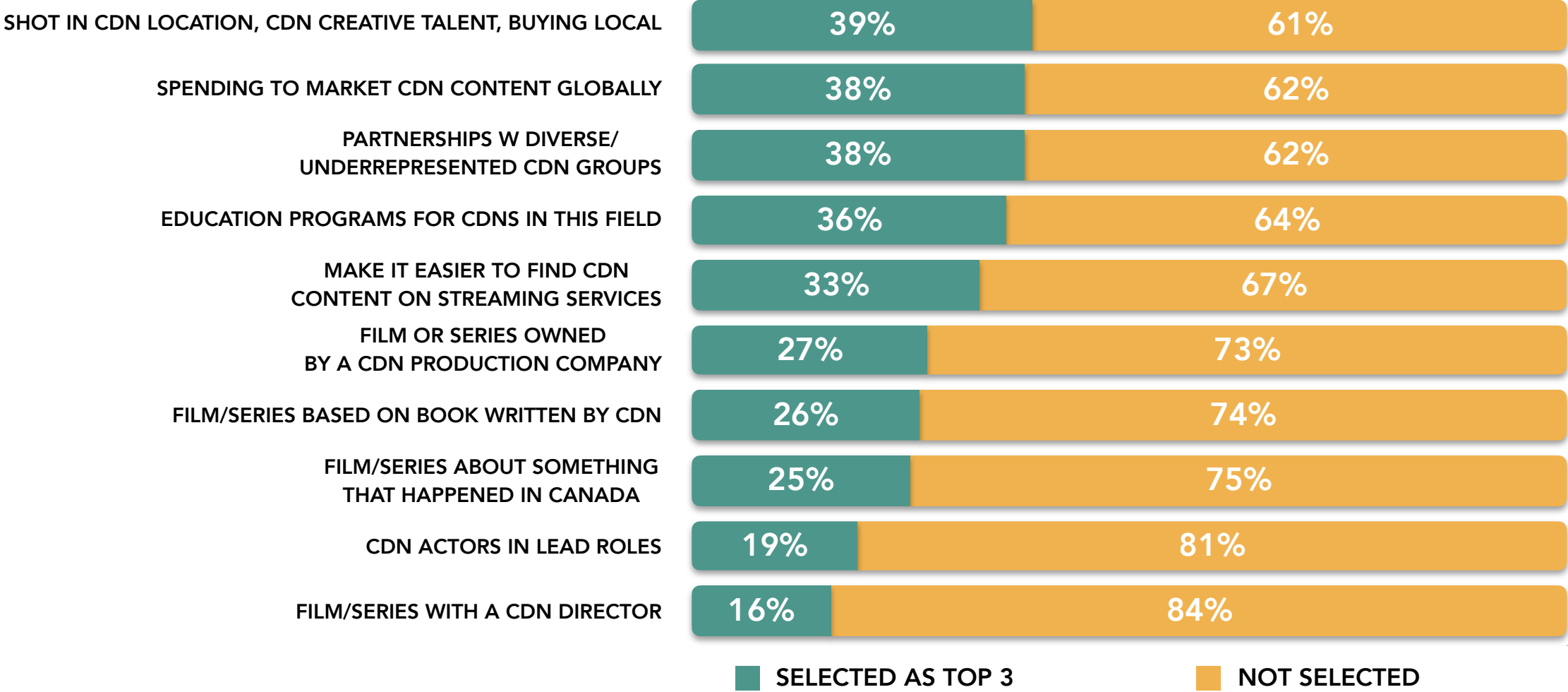
# Which are the three most valuable ways these companies can contribute? Francophone respondents only

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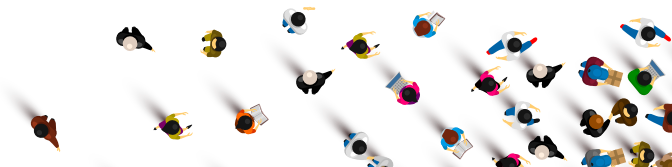
# Which are the three most valuable ways these companies can contribute? Under 30 respondents only

WHICH THREE DO YOU THINK ARE THE MOST VALUABLE WAYS THESE COMPANIES CAN CONTRIBUTE TO CANADA?



# Key Findings

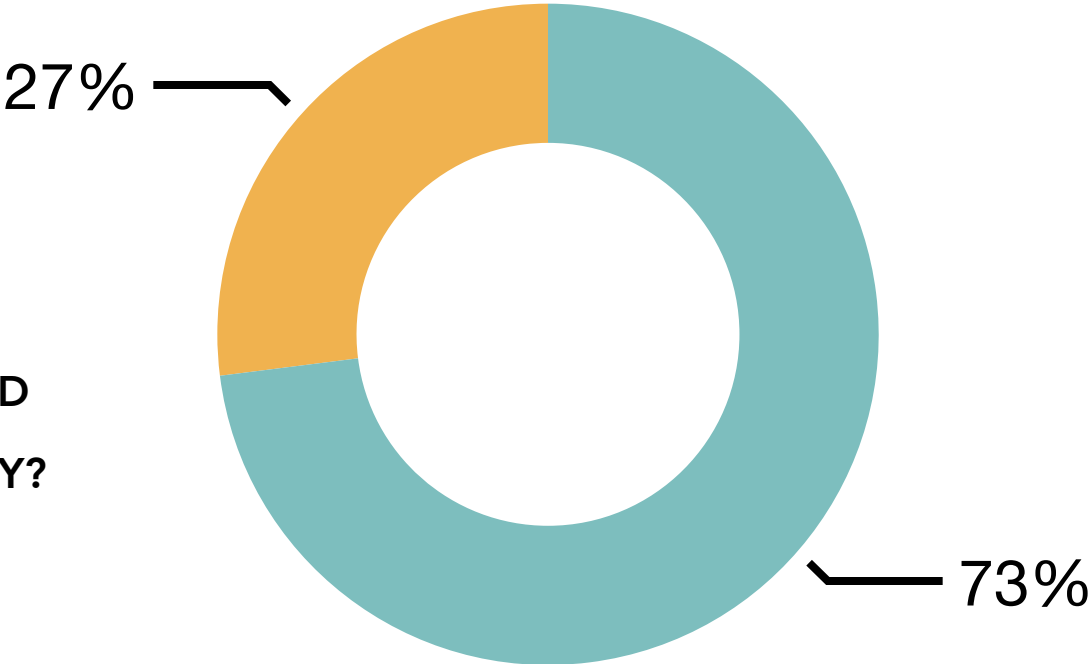
- By a roughly 3:1 ratio, Canadians think the priority for public policy should be more films/series shot in Canada, using Canadian talent, and exposed to global audiences, rather than more films and series owned by Canadian production companies.
- By a 3:1 margin, people reject the idea that to be valuable to Canada a film or series must be owned by a domestic production company. That view is the majority across all ages, from 65% among those 18-29 to 88% among those 60 or older. This is the view of 69% of Quebec francophones.



# Should Canadian ownership be the top policy priority?

- MORE FILMS/SERIES FEATURING CDN LOCATIONS/STORIES/TALENT SHOWN GLOBALLY
- MORE FILMS/SERIES OWNED BY CDN PRODUCTION COMPANIES

IF IT WERE UP TO YOU TO SET PUBLIC POLICY FOR THE FILM AND TV SECTOR IN CANADA WHICH WOULD BE YOUR HIGHER PRIORITY?



# Can a project be valuable to Canada, without Canadian ownership?

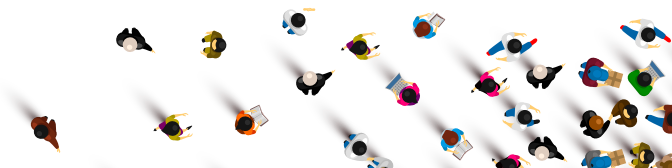
- TO BE VALUABLE TO CANADA'S GOALS, A FILM/SHOW MUST BE OWNED BY CANADIAN COMPANY
- FILMS/SHOWS BASED ON CDN STORIES/BOOKS, SHOT IN CANADA, WITH LOCAL WORKERS ALSO SHOULD BE CONSIDERED VALUABLE TO CANADA

WHICH IS CLOSER TO YOUR VIEW ?



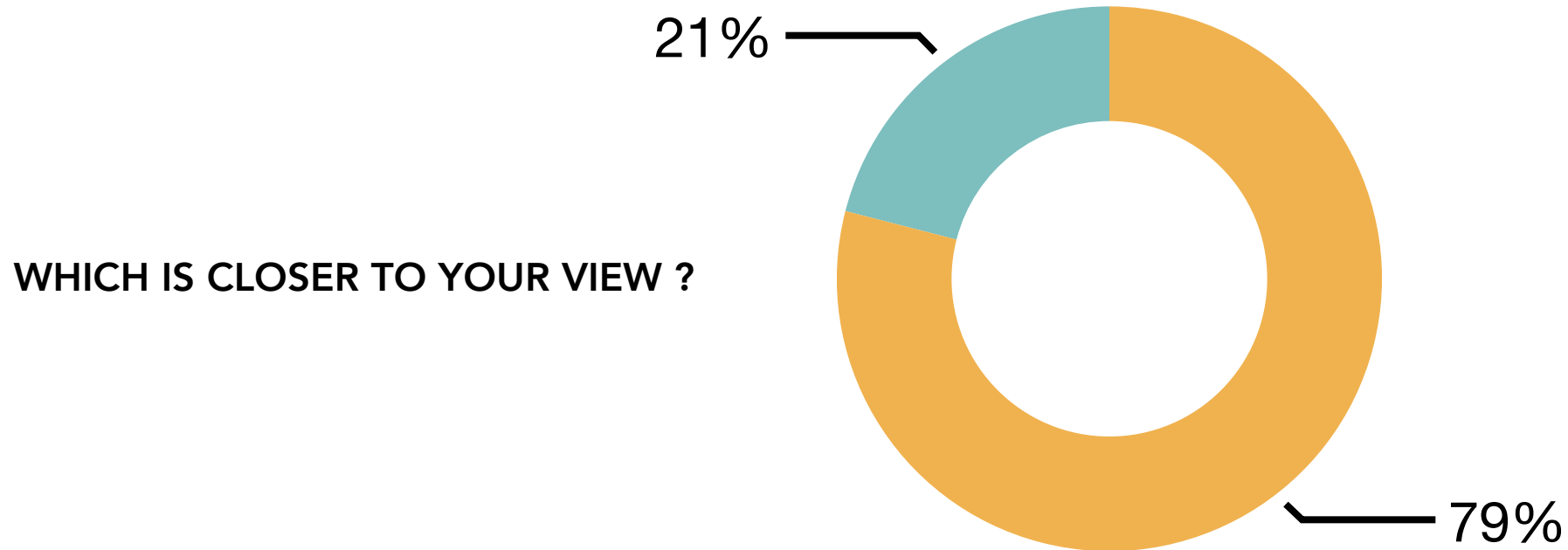
# Finding

- Most people believe the best way to help Canada's creative workers is to have streaming companies contribute is to use their own expertise to develop projects with Canadian talent and market them globally rather than have them contribute to a federally mandated fund that chooses where the funds should go.
- Most people think streaming companies do more to promote content from around the world, rather than crowding out International content with US content. This is the majority view across party lines, generations, and linguistic groups.
- People prefer that federal regulations be flexible to ensure that smaller niche services can thrive and make a unique contribution that is sensible given their size, business model



# Is it better for streaming companies to use their expertise to choose the ways they help contribute or pay into a fund that makes those decisions?

- USE THEIR EXPERTISE TO DEVELOP PROJECTS WITH CREATIVE CDN TALENT AND MARKET THESE GLOBALLY
- PAY INTO A FUND MANDATED BY FED GOV'T AND LET THE FUND MANAGERS CHOOSE HOW TO SPEND



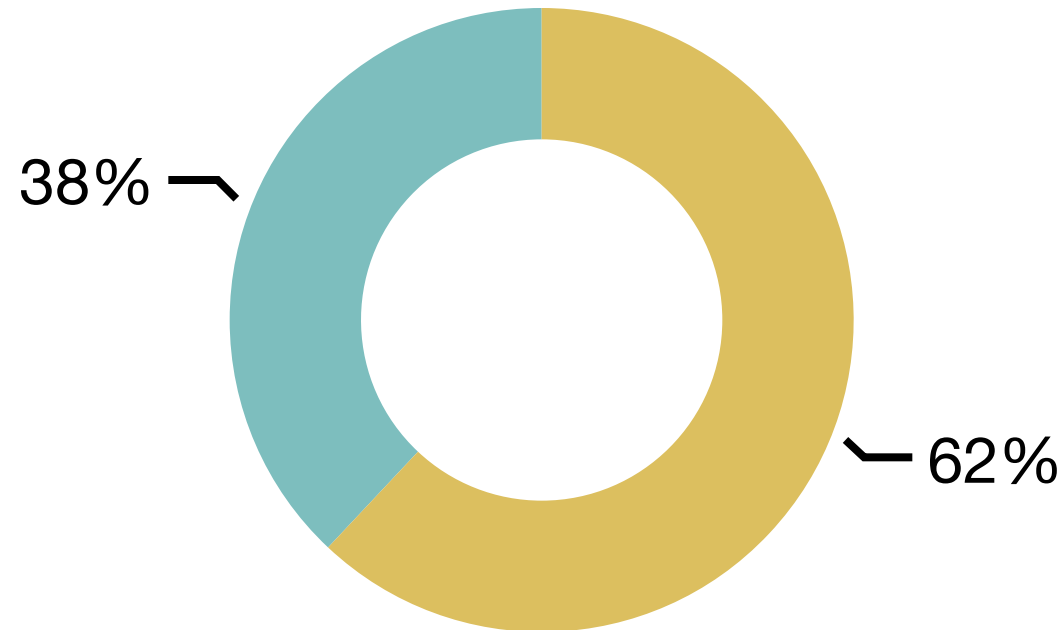
# Do streaming companies expose people to international content or crowd out international content with American films and series?

STREAMING SERVICES EXPOSE PEOPLE TO CONTENT FROM

● AROUND THE WORLD, INCLUDING CANADA, GIVING CREATORS MORE OPPORTUNITY

● PROMOTE SO MUCH AMERICAN CONTENT IT CROWDS OUT CONTENT FROM ELSEWHERE, MAKING IT HARDER FOR CREATORS FROM OTHER PLACES

WHICH IS CLOSER TO YOUR VIEW ?

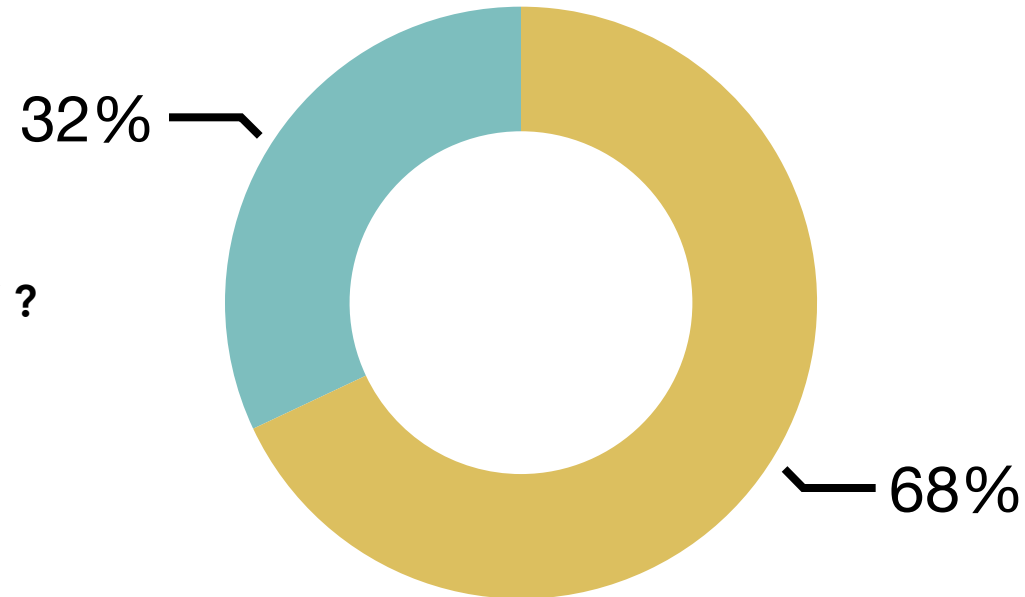




# Should federal policy in this area be flexible for smaller, niche streamers?

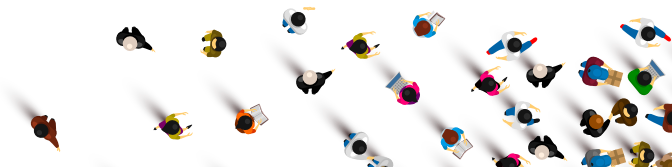
- SHOULD BE FLEXIBLE SO CANADIANS CAN HAVE ACCESS TO SMALLER NICHE STREAMING SERVICES, EG THIRD LANGUAGES, REALITY, ANIME, BRITISH TV
- NOT IMPORTANT IN MY VIEW

WHICH IS CLOSER TO YOUR VIEW ?



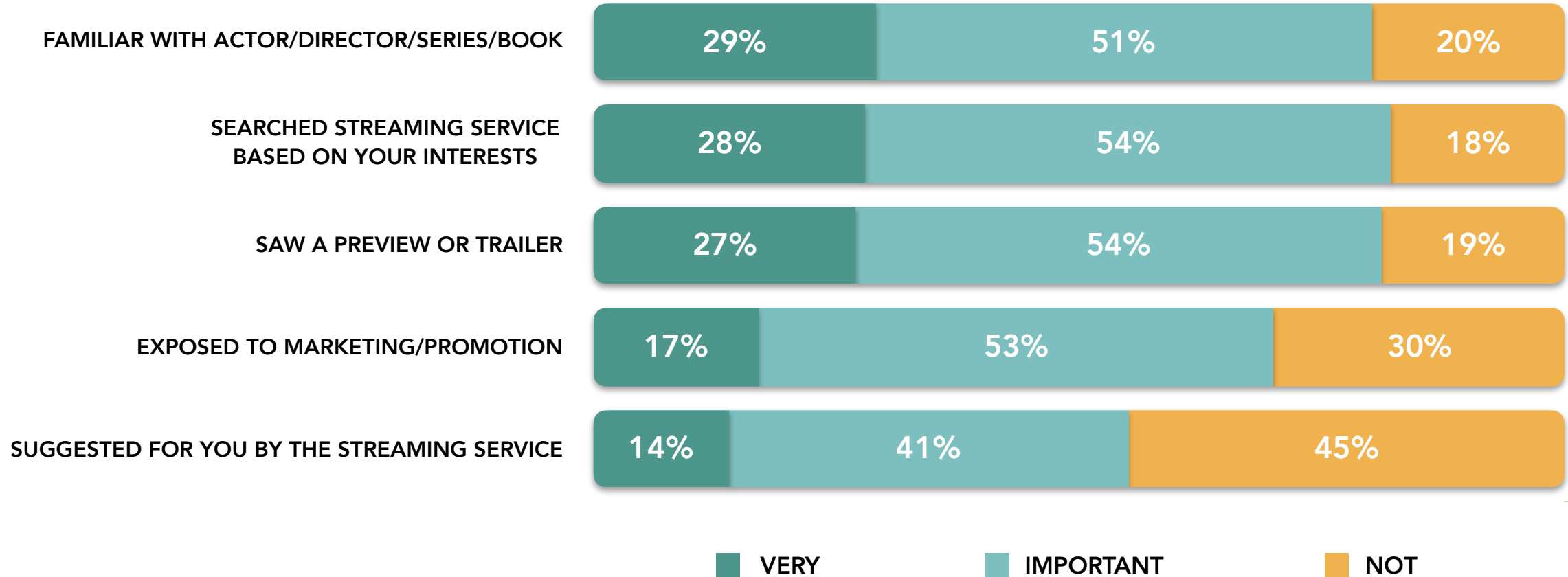
# Key Findings

- There are a number of ways that people find content they want to watch on streaming services. Familiarity with an actor, director, series, or book, and search functions are the most common methods of discovery. Exposure to marketing, previews, trailers also matter a lot. Streaming service suggestions are the least important of the methods tested.
- Use of streaming services is now almost as extensive as use of broadcast TV services, and is more common among those under 30.
- Exposure to international (non-US) content is more common on streaming services than on broadcast services, especially among those under 30



# How do you choose what to watch on a streaming service?

WHEN YOU PICK A FILM OR SERIES TO WATCH ON A STREAMING SERVICE HOW IMPORTANT ARE EACH OF THE FOLLOWING IN YOUR DECISION?

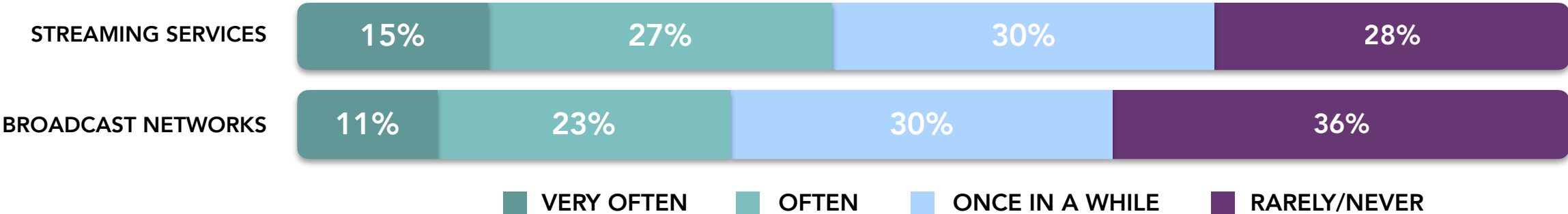


# Use of streaming services and exposure to international content

HOW OFTEN DO YOU WATCH STREAMING SERVICES/ TV NETWORKS OFF AIR OR VIA SATELLITE OR CABLE?



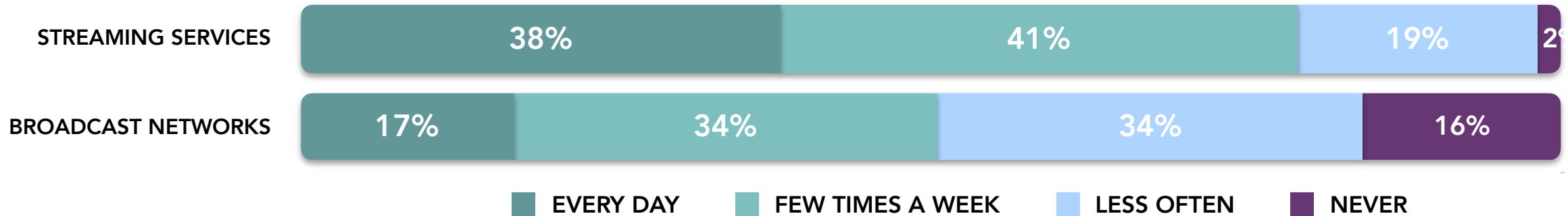
WHEN YOU WATCH STREAMING SERVICES/ TV NETWORKS HOW OFTEN DO YOU WATCH CONTENT FROM ANOTHER COUNTRY OTHER THAN THE US?



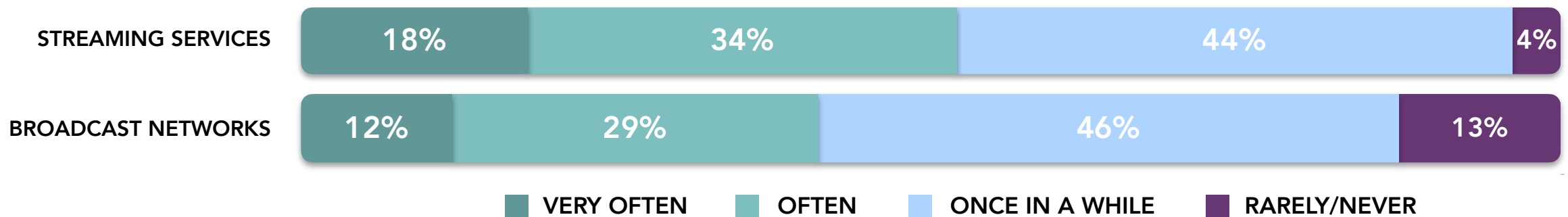
# Use of streaming services and exposure to international content

## Under 30 respondents only

HOW OFTEN DO YOU WATCH STREAMING SERVICES/ TV NETWORKS OFF AIR OR VIA SATELLITE OR CABLE?



WHEN YOU WATCH STREAMING SERVICES/ TV NETWORKS HOW OFTEN DO YOU WATCH CONTENT FROM ANOTHER COUNTRY OTHER THAN THE US?



# Conclusions

- Canadians see lots of value in the ways in which global studios and streaming services contribute to Canada. Canadian ownership of a film or series is not seen as a more important benefit for Canada than other contributions.
- People like the idea of allowing global studios/streamers be able to choose the ways in which they can make the most effective contribution, drawing on their expertise and harnessing their business models. They believe this is the best way to deliver opportunity to Canadian creative workers.
- The results describe a preference for policy flexibility rather than too much government prescription, likely because people see a lot of dynamic change within the content and platform marketplace.
- People want to see benefits for Canadians, but their priority is less about content ownership than it is about jobs and spin offs and global exposure of Canadian content.

