



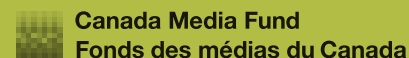
LEARNING FROM DOCUMENTARY AUDIENCES: A Market Research Study

September 2014

Researched and written by
Maria De Rosa
and Marilyn Burgess



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Executive Summary

1. Goals of the Study

As the Internet becomes a credible source for viewers in deciding which films to watch,¹ there is a need to better understand the viewing habits of Canadians with respect to documentaries. Within this context, Communications MDR on behalf of Hot Docs Canadian International Documentary Festival (Hot Docs) conducted audience research on the viewing habits of documentary audiences. For the purposes of this study, "documentary" refers to many types of documentaries—including documentary feature-length movies, short-film documentaries and documentaries on TV.

The overall goals of this research were: 1) to conduct a market scan of the current documentary offerings to audiences in Canada; 2) to discover the transactional habits of documentary audiences and; 3) to identify where, when, why and how documentary audiences are viewing and sharing documentary information and content.

2. Approach and Methodology

The study used the following methodologies: 1) a literature review to better understand the availability of documentaries; 2) primary audience research in the form of a national online survey in English and in French aimed at Canadian documentary audiences; and 3) focus groups sessions in English and in French with documentary enthusiasts in five locations in Canada.

A national survey of Canadian documentary audiences was conducted to gather statistical information that would help to better understand this audience and identify potential market opportunities within it.

Efforts were made to ensure the greatest participation of documentary audiences across the country. The survey was promoted widely through various social media channels and through the following outreach partners: Atlantic Film Festival, Belleville Downtown DocFest, Calgary International Film Festival, Global Visions Film Festival, Hot Docs, National Film Board of Canada, National Screen Institute, Rencontres internationales du documentaire de Montréal and Vancouver International Film Festival.

Over 50,000 surveys were sent out and the survey was active between April and June 2014. Respondents were invited to respond to the survey on an opt-in basis and recruitment surpassed the original objective of 3,000 responses, achieving a total of 3,271 responses and yielding a high level of reliability.² While the number of respondents to the survey was satisfactory, a number of limitations apply, as discussed below under Limitations. Based on the results of the survey, the consultants applied segmentation techniques to develop distinct audience profiles.

The consultants conducted focus groups in Montreal, Toronto, Vancouver, Winnipeg and Halifax with the aim of supplementing the findings of the online survey with the personal experiences and perspectives of documentary enthusiasts. A "snowball sample" of volunteers was recruited using a variety of promotional tools including outreach by Hot Docs' festival partners, other cultural and local organizations, word of mouth and social media channels.³

In total, 50 people participated, both women and men, drawn from a variety of walks of life and representing a range of age groups. (See Annex 2 for a Profile of Survey Respondents.)

1 For a recent discussion of this, see *Study on the Movie-Watching Habits of Canadians*, Telefilm Canada, April, 2013.

2 In populations of 20,000 or more, a sample of 3,000 with a response distribution of 50% has a margin of error of 2.2% or less, 99% of the time.

3 The snowball technique refers to the use of personal networks and acquaintances to recruit others to form a study sample.

2.1 Limitations

This study was limited to an examination of documentary audiences who opted to participate in the national online survey and focus groups. While the number of respondents to the survey was satisfactory, a number of limitations apply.

Regional interpretations of the results of the online survey are limited by the uneven regional distribution of responses, which was concentrated in two provinces, Ontario and British Columbia. Only two per cent of respondents had a rural postal code. Caution was similarly used with respect to language, as only six per cent of responses were French language.

A greater proportion of women (71 per cent) responded to the survey than did men. Similarly, 64 per cent of focus group participants were women. Further research is needed on the overall composition of the documentary audiences to understand the greater representation of women in the survey sample.

Overall, based on the samples obtained for the national online survey and the focus groups, this report avoids drawing conclusions on the basis of region, gender or language. While the focus groups were regionally based, any regional analyses that might be afforded through the focus groups have been approached with caution, given the absence of statistical regional data.

The high level of interest in theatrical viewing by participants in this study is to be expected in light of the fact that the survey and focus groups had high representation from the audiences of participating festivals. These results may not be representative of documentary audiences at large.

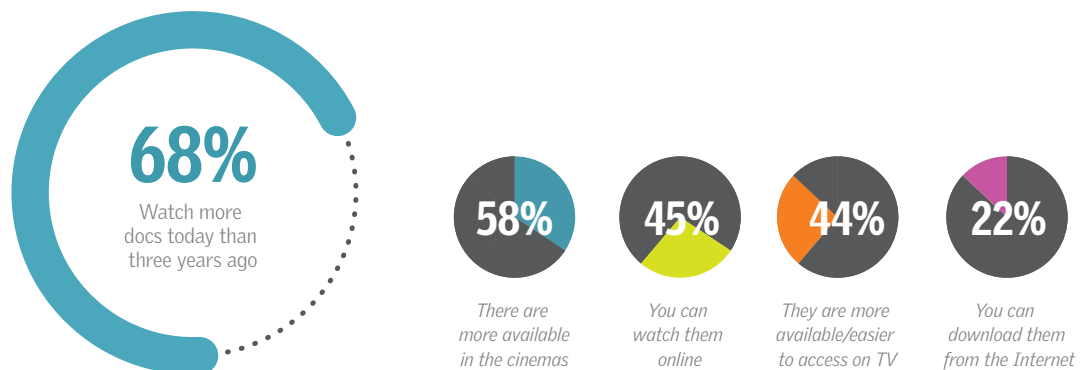
The aim of the focus groups was to obtain qualitative information from documentary enthusiasts, and as such no effort was made to align the composition of the focus groups to the market segments identified through the national online survey.

3. Key Findings

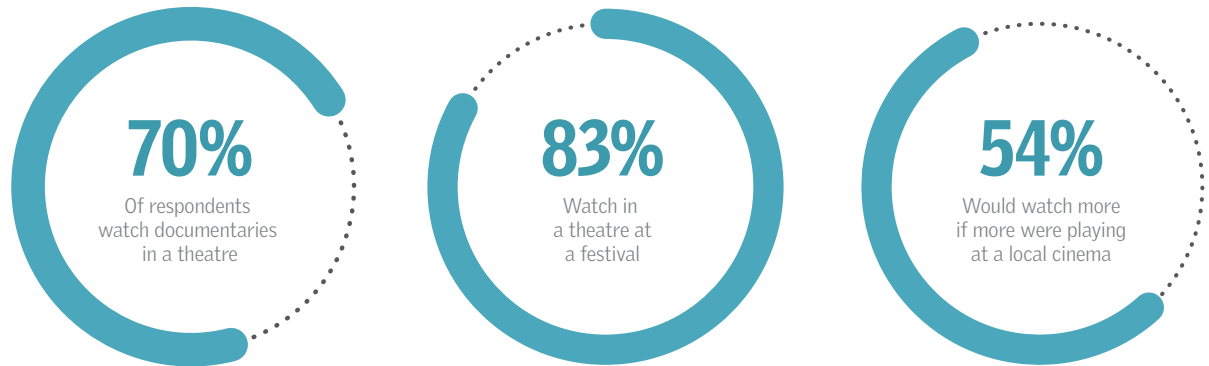
1. Documentary Viewing is Popular on All Platforms

Documentary audiences surveyed for this report watch documentaries at home on television, on DVD or Blu-Ray, streamed or downloaded from the Internet, and at a movie theatre or film festival. The majority of viewers watch for the most part at least two or more documentaries each month, on all platforms. Overall, participants in this study say they are watching more documentaries today than they were three years ago.

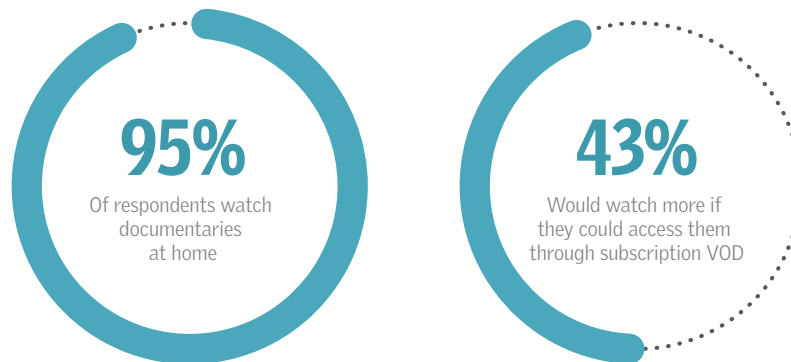
REASONS FOR WATCHING MORE DOCUMENTARIES THAN THREE YEARS AGO



While at-home viewing is almost universal amongst those surveyed, the theatrical experience is also important to this audience, with the great majority watching documentaries at the cinema, and particularly during film festivals.



At home, documentary audiences surveyed for this study are viewing on all platforms, with a preference for cable or satellite services on the one hand, and "over-the-top" (OTT) subscription video-on-demand (SVOD) platforms on the other.⁴ In that regard, Netflix is as important a source for documentaries as traditional cable or satellite service television, even surpassing these in importance with younger audiences.⁵



⁴ Subscription video-on-demand (SVOD) is defined as any package of programs offered for a specific price and period of time. Requesting and delivering content is the same as with standard VOD. OTT refers to services falling outside the regulated Canadian broadcasting system.

⁵ *Communications Monitoring Report*, CRTC, September 2013, page 81.

2. Participants Are Socially Engaged and Keenly Interested in Viewing Documentaries on All Platforms

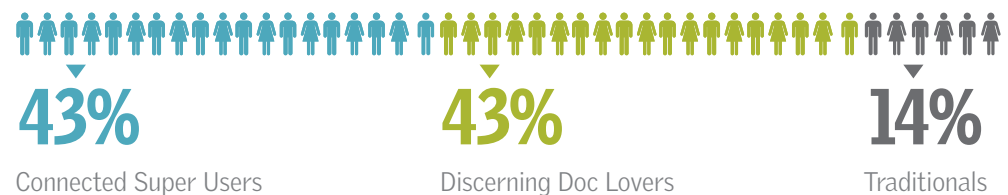
Participants in this study are socially engaged and documentaries in all formats are valued sources for in-depth information. Highly educated, they seek out documentaries for the opportunities for lifelong learning that they afford. Audiences are also watching documentaries to be entertained. Most surveyed would watch more documentaries if more were available at a local theatre, through their subscription video-on-demand (SVOD) service or on conventional TV.

Focus groups conducted for this study support the finding that there is a strong desire and interest to have more access to documentaries. Participants were passionate about the impact of documentaries on their lives as tools of information, for entertainment and for learning. Furthermore, participants are seeking different screen experiences depending on the format of the documentary and the social aspect and discussion afforded by documentaries.

3. Three Market Segments Identified: Connected Super Users, Discerning Documentary Lovers and Traditionals

This study identified three documentary audience segments presenting different market opportunities: Connected Super Users, Discerning Documentary (Doc) Lovers and Traditionals. The Connected Super Users and Discerning Doc Lovers provide the greatest opportunities for increased engagement and audience development online.

THREE MARKET SEGMENTS IDENTIFIED AMONGST SURVEY RESPONDENTS



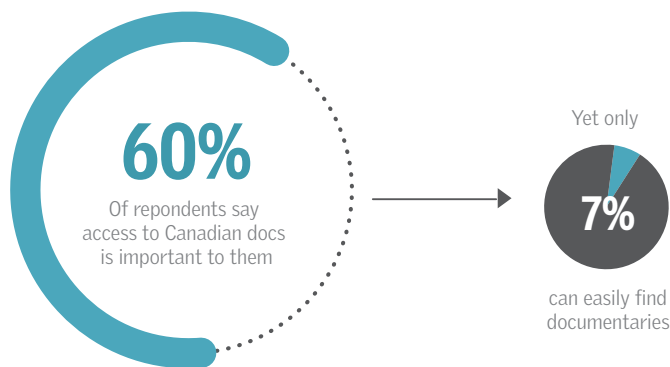
Younger, tech-savvy "super users" consume the most documentaries and consume the most online. Representing 43 per cent of those surveyed, and with the highest proportion of men, this group is the most interested in point-of-view (POV) documentaries and in seeking out documentaries online. They tend to be more connected through services such as Netflix and iTunes. They are also more likely to watch documentaries on paid portals such as Vimeo On Demand.

The second group, Discerning Documentary Lovers, tend to be slightly older, leaning towards middle age, with children at home. Also representing 43 per cent of those surveyed, they love documentaries and are discerning in their tastes, preferring to seek out titles they have heard of rather than browsing. They would be more likely to watch more documentaries online if they could find the documentaries they have identified as interesting to them.

The Traditionals, which represent 14 per cent of those surveyed, tend to be older still with more of retirement age. These viewers say they do not watch documentaries over the Internet. At home, they tend to be casual TV viewers who discover documentaries by browsing. They are more likely to be interested in more opportunities to watch documentaries on TV and in theatres, and to rely on film and TV listings to discover new documentaries. This group is also more likely to be interested in the social aspects of documentary viewing at the cinema.

4. Greater Tools Are Needed for Discovery and Promotion

This study finds that if more tools for discovery and promotion were available, respondents to this study would increase their viewing of documentaries. Social media presents an opportunity for greater discoverability particularly with younger documentary audiences. A majority of those surveyed are interested in accessing more Canadian documentaries.

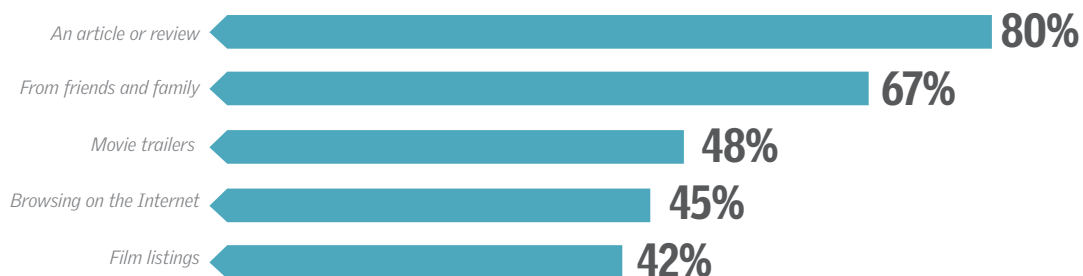


The decision to watch a documentary is influenced by trusted sources. Participants in this study discover documentaries via articles and reviews (in any media, including online, radio, in a newspaper or magazine or on television), friends and family and to a lesser degree social media. Focus group research reveals the important role played by print, television and social media in the discovery habits of participants. In addition to online, TV and film listings are also important to participants in guiding viewing decisions. The study also finds that social media is an important vehicle for sharing documentaries, and is even being used by those who don't watch documentaries online: however, it is not as important for discovering documentaries.

Not surprisingly, the study finds that younger audiences are more adept at using social media and the Internet to find documentaries of interest. This is consistent with national trends that show that online video viewing is highest amongst audiences under the age of 35.⁶ Some are following trusted sources on Twitter, consulting podcasts from iTunes and consulting their preferred curated portals to find documentaries. In addition, some are blogging about their discoveries.

For some, viewing the trailer is important, while for others, the recommendation of a trusted source is enough to decide to watch a documentary.

HOW VIEWERS DISCOVER DOCS



⁶ Canada, *Digital Future in Focus 2014*, ComScore, 2014, as cited by Anshul Srivastava, "Canadians Are Spending More Time Online Watching Videos: Online Ad-Spending on Videos Set to Grow to \$360.5 Million by 2016 [Study]," in *www.dazinfo.com*, January 20, 2014.

5. Greater Access to Content Online

In deciding to watch documentaries, participants in this study are looking for curated choices, convenient access and interesting cinematic and social experiences. Preferences for access by platform depend on the various experiences being contemplated by viewers and they are open to all of them.

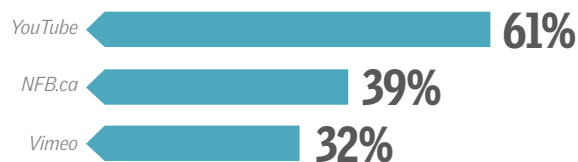
While nationally Canadians are said to be watching more web-based video, including live and on-demand TV,⁷ the documentary audiences surveyed for this report are viewing documentaries over the Internet primarily to access documentaries that cannot be seen any other way. A significant proportion of documentary audiences would pay for the convenience afforded by online viewing to watch when and where they choose. A sizeable minority of viewers is watching documentaries through iTunes.

Focus group research reveals that participants are willing to pay to have convenient access to documentaries in cinemas, at home through subscription VOD services offering a good selection of documentaries, and through pay-per-view services.

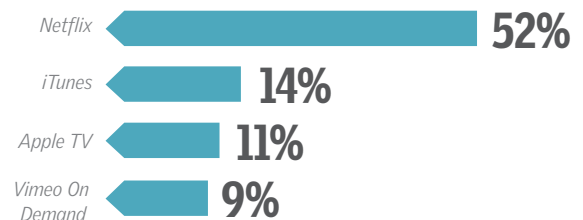
The monthly subscription fee of a Netflix-type service would be of interest as a payment model for respondents as would transactional services (for example, pay-per-view or iTunes) in which viewers are charged for the purchase of one program only. Specific price points mentioned by focus group participants were the \$5 per download charged by iTunes with respect to single viewings to the \$7.99 monthly fee (in some markets) charged by Netflix with respect to SVOD services.



MOST POPULAR FREE ONLINE PLATFORMS



MOST POPULAR PAID ONLINE PLATFORMS



7 IBID.

INTRODUCTION

1. Preamble

As the Internet becomes a credible source for viewers in deciding which films to watch,⁸ there is a need to better understand the viewing habits of Canadians with respect to documentaries. Within this context, Hot Docs Canadian International Documentary Festival (Hot Docs) commissioned Communications MDR to conduct audience research on the viewing habits of documentary audiences. For the purposes of this study, “documentary” refers to many types of documentaries—including documentary feature-length movies, short-film documentaries and documentaries on TV.

The overall goals of this research were: 1) to conduct a market scan of the current documentary offerings to audiences in Canada; 2) to discover the transactional habits of documentary audiences; and 3) to identify where, when, why and how documentary audiences are viewing and sharing documentary information and content.

2. Approach and Methodology

The study used the following methodologies: 1) a literature review to better understand the availability of documentaries; 2) primary audience research in the form of a national online survey in English and in French aimed at Canadian documentary audiences; and 3) focus groups sessions in English and in French with documentary enthusiasts in five locations in Canada.

2.1 National Online Survey

A national survey of Canadian documentary audiences was conducted to gather statistical information that would help to better understand this audience and identify potential market opportunities within it.

Administered online, the survey questionnaire was designed to capture where respondents are watching documentaries, their preferences in terms of where they would like to watch them, how they find the documentaries they are watching, the factors influencing their decision to watch them, their transactional habits and preferences, and the different ways that they share their experience and awareness of documentaries with others.

Efforts were made to ensure the greatest participation of documentary audiences across the country. The survey was promoted widely through various social media channels and through the following outreach partners: Atlantic Film Festival, Belleville Downtown DocFest, Calgary International Film Festival, Global Visions Film Festival, Hot Docs, National Film Board of Canada, National Screen Institute, Rencontres internationales du documentaire de Montréal and Vancouver International Film Festival.

Over 50,000 respondents were invited to respond to the survey on an opt-in basis and recruitment surpassed the original objective of 3,000 responses, achieving a total of 3,271 responses and yielding a high level of reliability.⁹ While the number of respondents to the survey was satisfactory, a number of limitations apply, as discussed below in Point 2.3. Based on the results of the survey, the consultants applied segmentation techniques to develop distinct audience profiles.

⁸ For a recent discussion of this, see *Study on the Movie-Watching Habits of Canadians*, Telefilm Canada, April 2013.

⁹ In populations of 20,000 or more, a sample of 3,000 with a response distribution of 50% has a margin of error of 2.2% or less, 99% of the time.

2.2 Focus Groups

The consultants conducted focus groups in Montreal, Toronto, Vancouver, Winnipeg and Halifax with the aim of supplementing the findings of the online survey with the personal experiences and perspectives of documentary enthusiasts.

A range of facilitation techniques were used aimed at encouraging engaged discussion and participation to explore the personal views of participants and elicit meaningful insights into their attitudes, behaviours and motivations with respect to watching documentaries.

A "snowball sample" of volunteers was recruited using a variety of promotional tools, including outreach by Hot Docs' outreach partners, other cultural and local organizations, word of mouth and social media channels.

In total, 50 people, 32 women and 18 men, participated, drawn from a variety of walks of life and representing a range of age groups. Among the participants were managers, students, writers, technologists, lawyers, government workers, educators, fine and graphic artists, journalists, researchers, hotel industry professionals, financial analysts and planners, volunteers and retirees. Seventeen participants were between the ages of 18 and 34, 18 were between the ages of 35 and 54, and 13 were between 55 and 69 years old. Two participants were 70 years or older. Thirteen people participated in the focus group sessions in Vancouver and Toronto, respectively, while sessions in Montreal, Halifax and Winnipeg had eight participants each.

2.3 Limitations of the Study

This study was limited to an examination of documentary audiences who opted to participate in the national online survey and focus groups.

Regional interpretations of the results of the online survey are limited by the uneven regional distribution of responses, which was concentrated in a number of provinces, notably Ontario and British Columbia. Only two per cent of respondents had a rural postal code. Caution was similarly used with respect to language, as only six per cent of responses were French language.

A greater proportion of women (71 per cent) responded to the survey than did men. Similarly, 64 per cent of focus group participants were women. Further research is needed on the overall composition of the documentary audiences to understand the greater representation of women in the survey sample.

Overall, based on the samples obtained for the national online survey and the focus groups, this report avoids drawing conclusions on the basis of region, gender or language. While the focus groups were regionally based, any regional analyses that might be afforded through the focus groups have been approached with caution given the absence of statistical regional data.

The high level of interest in theatrical viewing by participants in this study is to be expected in light of the fact that the survey and focus groups had high representation from the audiences of participating festivals. These results may not be representative of documentary audiences at large.

The aim of the focus groups was to obtain qualitative information from documentary enthusiasts, and, as such, no effort was made to align the composition of the focus groups to the market segments identified through the national online survey. That said, the distribution of survey respondents and focus group participants was similar according to age and gender.

3. Structure of This Report

This report is divided into four sections:

- Section A presents the key trends in the viewership of documentaries by participants in a national online survey;
- Section B provides profiles of the documentary audiences surveyed for this study based on market segmentation analysis;
- Section C describes the qualitative insights of participants in focus groups on the factors that influence their decisions to watch documentaries, their transactional habits and preferences; and
- Section D provides concluding summary observations.

A. KEY TRENDS IN THE VIEWERSHIP OF DOCUMENTARIES

1. Preamble

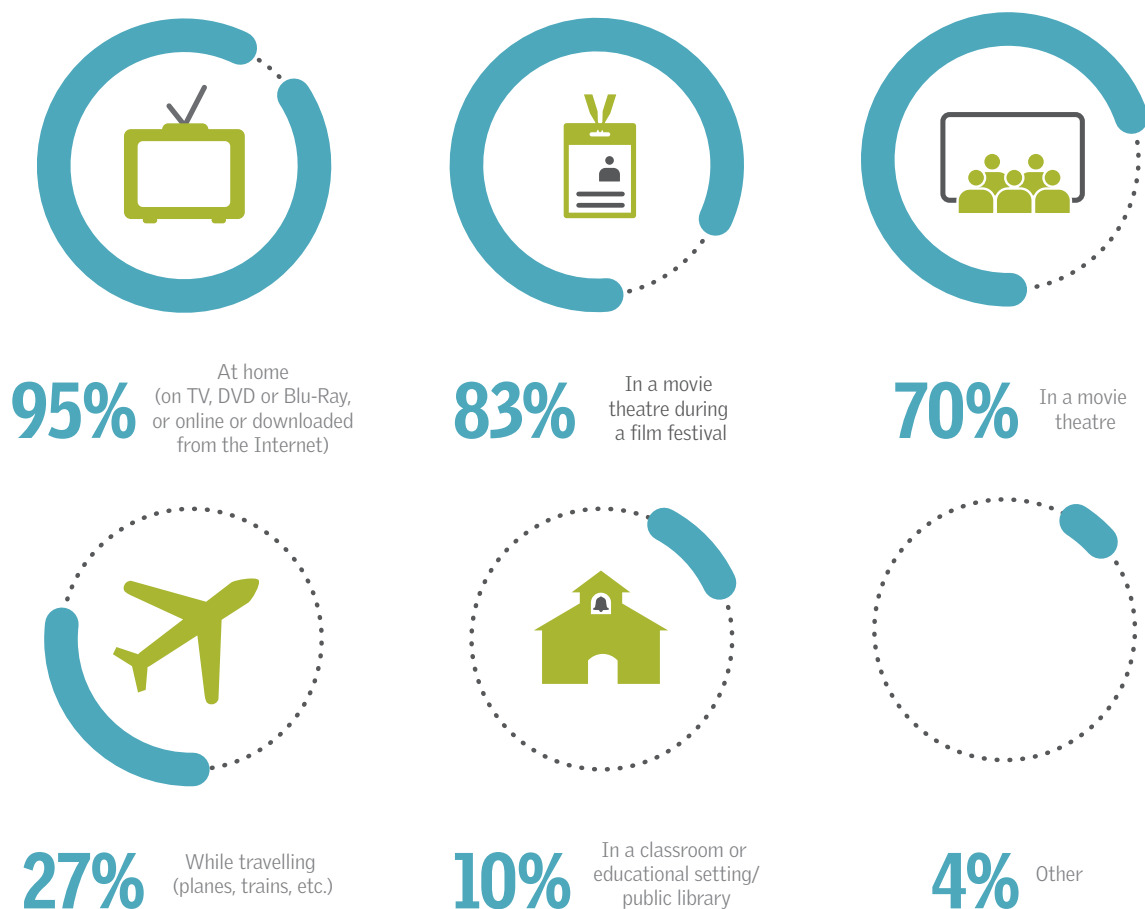
This section provides an overview of the key trends in the viewership of documentaries, drawing from the results of a national online survey of documentary audiences.

2. Key Trends

2. 1. Documentary Viewing Is Taking Place on All Platforms

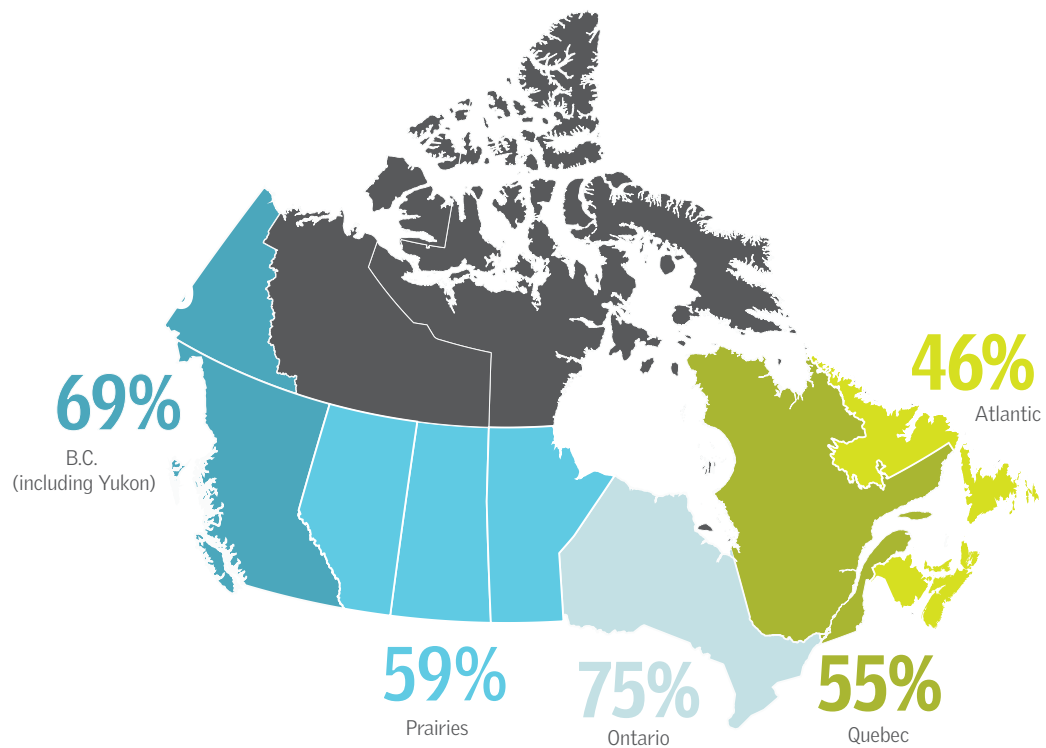
When asked where they watch documentaries, 95 per cent of survey respondents said they watch documentaries at home on the following platforms: television, DVD or Blu-Ray, and streamed or downloaded from the Internet. Eighty-three per cent of respondents watch documentaries in movie theatres during a film festival.

FIGURE 1: WHERE RESPONDENTS SAY THEY ARE WATCHING DOCUMENTARIES



As a percentage of respondents by region, the majority of documentary audiences who said they had watched a documentary in a cinema were in Ontario, followed by British Columbia. In general, about half or more of audiences surveyed said they watch documentaries in a cinema. The lowest number of theatrical viewers as a proportion of all regional respondents was in Atlantic Canada, where 46 per cent of regional respondents said they watch documentaries in a cinema.

FIGURE 2: VIEWING DOCUMENTARIES IN CINEMAS, BY REGION



2.2 Documentary Viewing Increases With Age

Sixty-two per cent of all respondents said they watch documentaries at least twice per month. A higher proportion of older viewers watch documentaries at least twice per month.

2.3 Audiences who Watch Documentaries Also Participate in Other Cultural Events

Over 83 per cent of respondents who said they watch documentaries at least twice per month also attended a live performing arts event, as compared to only 62 per cent of those who said they rarely watch documentaries (once per year). Similarly, over 89 per cent of respondents who said they watch at least twice per month also indicated they visited an art gallery or museum in the past year, as compared to 65 per cent of those who said they rarely watch docs (once per year).

Frequent documentary viewers are also greater consumers of digital publications. Sixty-four per cent of respondents who indicated they watch documentaries at least twice per month also said they read a book or magazine online or on a tablet, as compared to only 35 per cent of those who said they rarely watch documentaries (once per year).

2.4 All Documentary Formats Are Popular With Viewers

Almost all respondents said they watch feature-length documentary films. Sixty per cent of respondents also watch short-form documentaries. Eighteen-to-34 year olds tend to watch more feature documentaries, while respondents aged 35 and older tend to watch more television documentaries (Figure 4).

FIGURE 3: VIEWING OF DOCUMENTARY FORMATS

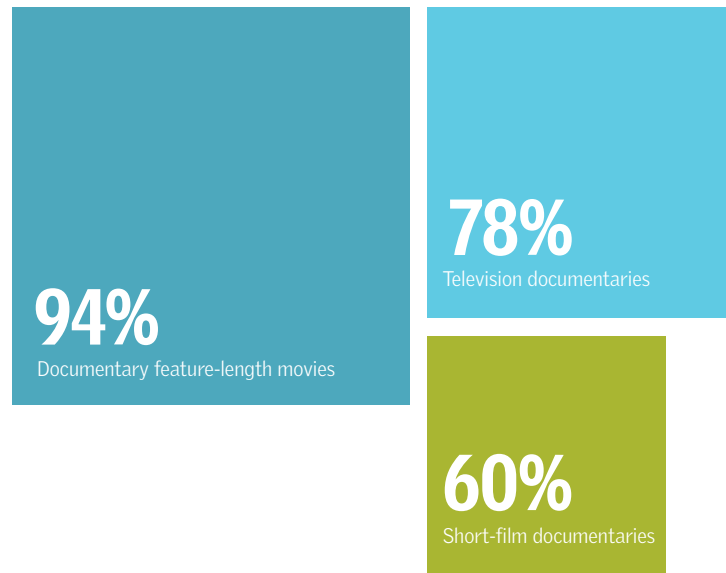
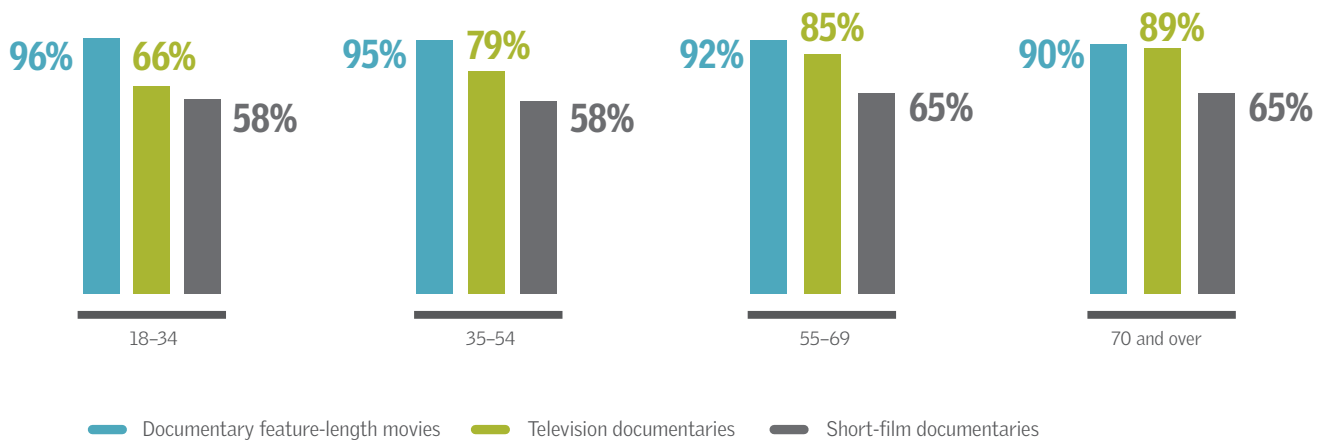


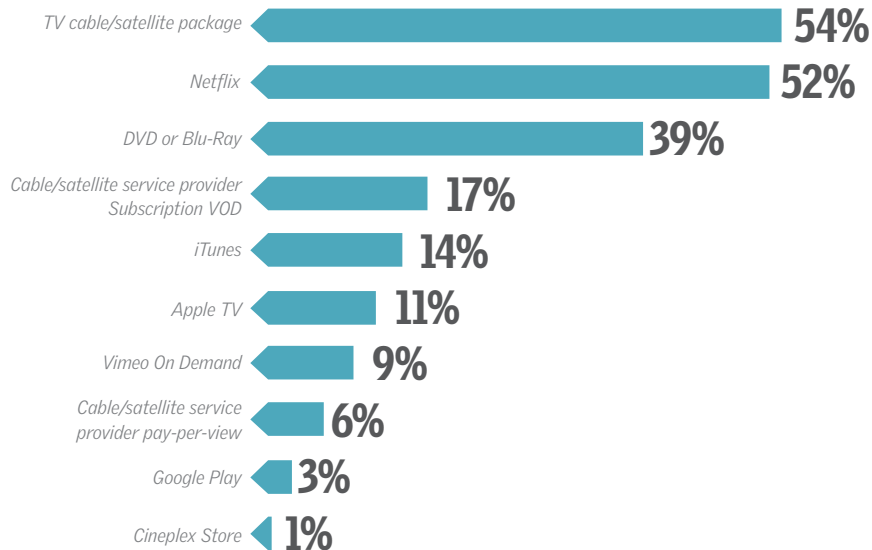
FIGURE 4: VIEWING OF FORMATS, BY AGE GROUP



2.5. Subscription Cable/Satellite Services and Netflix Lead Viewing at Home

Respondents primarily watch documentaries through subscription-based services. Subscriptions for cable or satellite and Netflix are the most popular ways that audiences are watching documentaries, followed by the purchase or rental of DVD or Blu-Ray discs.¹⁰

FIGURE 5: POPULARITY OF AT-HOME VIEWING PLATFORMS



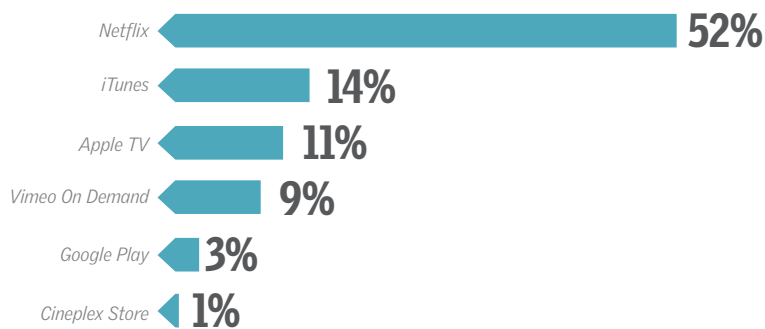
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Cable and satellite service providers offer both subscription video-on-demand (VOD) and pay-per-view (PPV) access to documentaries. VOD is defined as a service from which the viewer can select programs to view at the time of their own choosing rather than having to watch at a specific broadcast time. A subscription video-on-demand service is defined as any package of programs offered for a specific price and period of time, and typically involves a monthly fee for unlimited access to programs. By contrast, pay-per-view (PPV) provides access to a cable or satellite service provider's scheduled telecast on a pay-per-view basis. The subscriber selects a program from the station's schedule and is charged for the purchase of that program only.

2.6. Netflix Is Preferred Paid Online Platform, Followed by iTunes and Vimeo On Demand

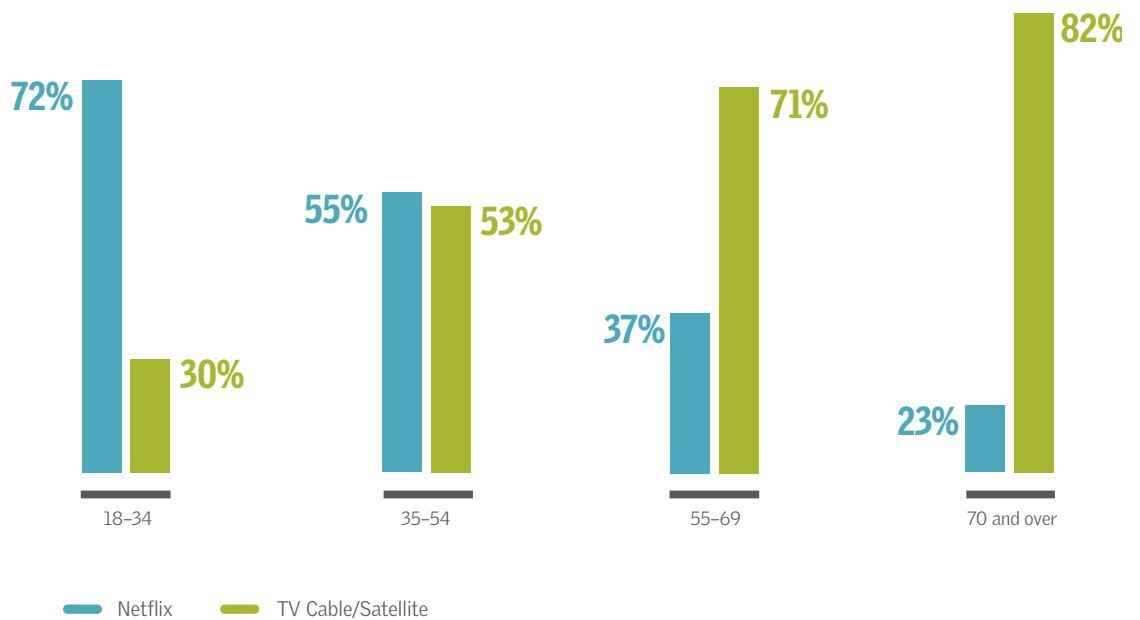
Documentary audiences surveyed are paying to watch documentaries through a variety of platforms online, led by Netflix, which 52 per cent of respondents say they pay to watch. Fourteen per cent of respondents are viewing documentaries through iTunes. Nine per cent of audiences pay to watch on Vimeo On Demand and three per cent through Google Play.

FIGURE 6: PAID VIEWING OF DOCUMENTARIES THROUGH ONLINE PLATFORMS



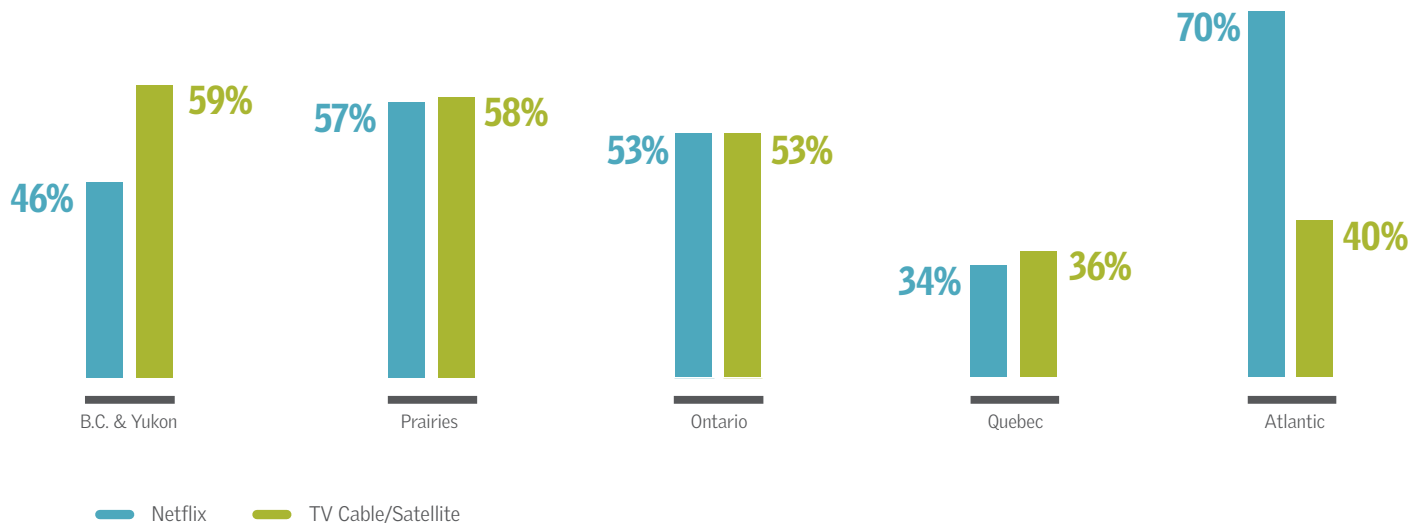
The willingness to pay for access to documentaries online through Netflix increases with younger audiences (see Figure 7). As can be seen in the figure below, Netflix viewers tend to be younger, while viewers using cable and satellite services tend to be older.

FIGURE 7: POPULARITY OF NETFLIX AND CABLE/SATELLITE TV FOR WATCHING DOCUMENTARIES, BY AGE



The market penetration of the paid online platform Netflix varies across the country. As can be seen in Figure 8, Atlantic respondents report using Netflix more often than their TV cable or satellite service provider to access documentaries. The reverse is true in British Columbia, where 46 per cent of B.C.-based respondents said they use Netflix and 59 per cent said they use their TV cable or satellite service provider to view documentaries.¹¹

FIGURE 8: POPULARITY OF NETFLIX AND TV CABLE/SATELLITE SERVICES FOR DOCUMENTARY VIEWING, BY REGION

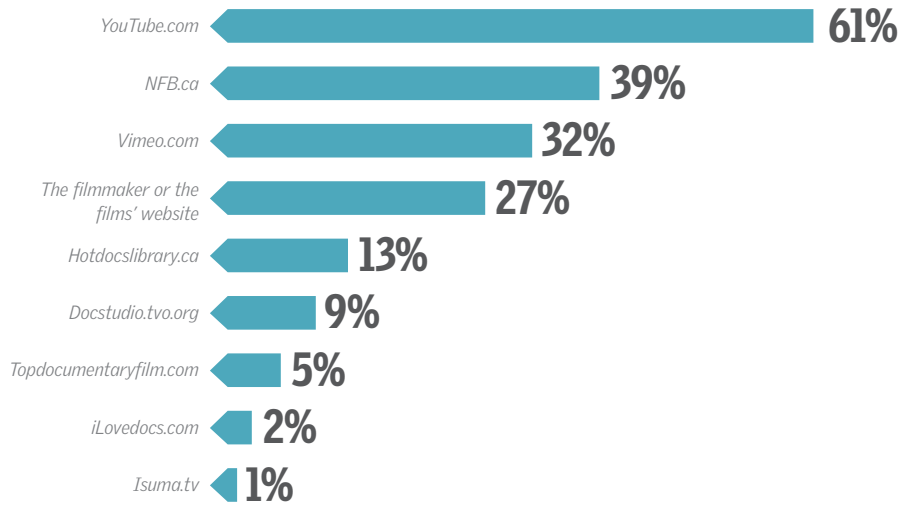


2.7 YouTube and NFB.ca Are Popular Online Portals for Free Viewing of Documentaries

YouTube is a popular online destination for watching documentaries (61 per cent of those surveyed), followed by NFB.ca (39 per cent) and Vimeo.com (32 per cent). These sites provide free access. Twenty-seven per cent of respondents also say they visit a film's or filmmaker's website to view documentaries online. A small number of respondents are accessing documentaries via Documentaryheaven.com or Filmsforaction.org (less than one per cent for each service).

¹¹ This analysis should be used with caution. Percentages given are based on percentages of the total number of regional respondents.

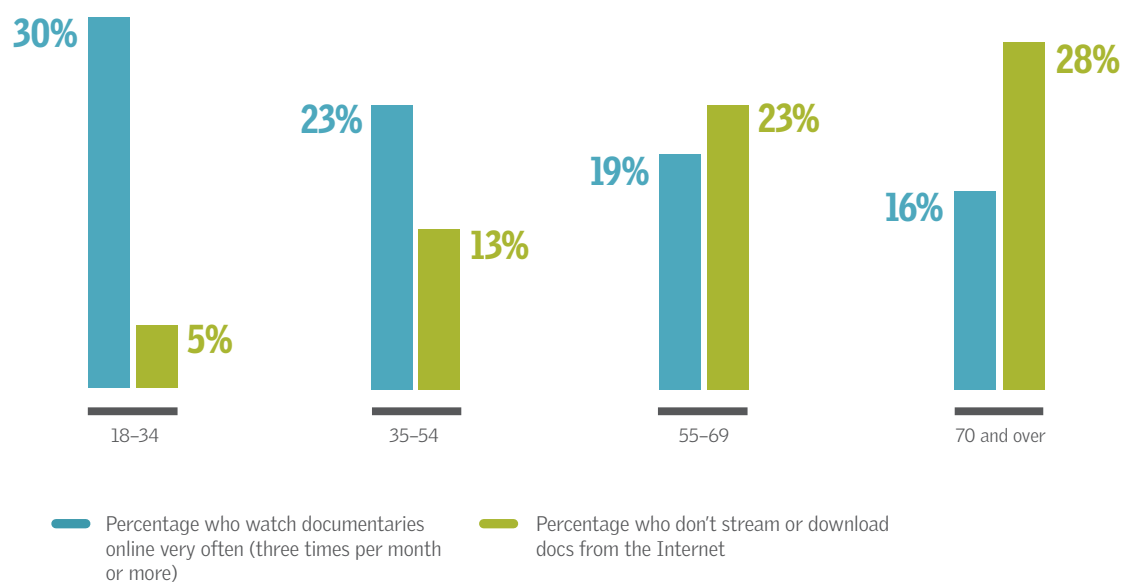
FIGURE 9: MOST POPULAR ONLINE DOCUMENTARY PORTALS



2.8 Overall, Online Documentary Viewers Tend to Be Younger

Overall, younger viewers view documentaries streamed or downloaded from the Internet more frequently than older audiences.

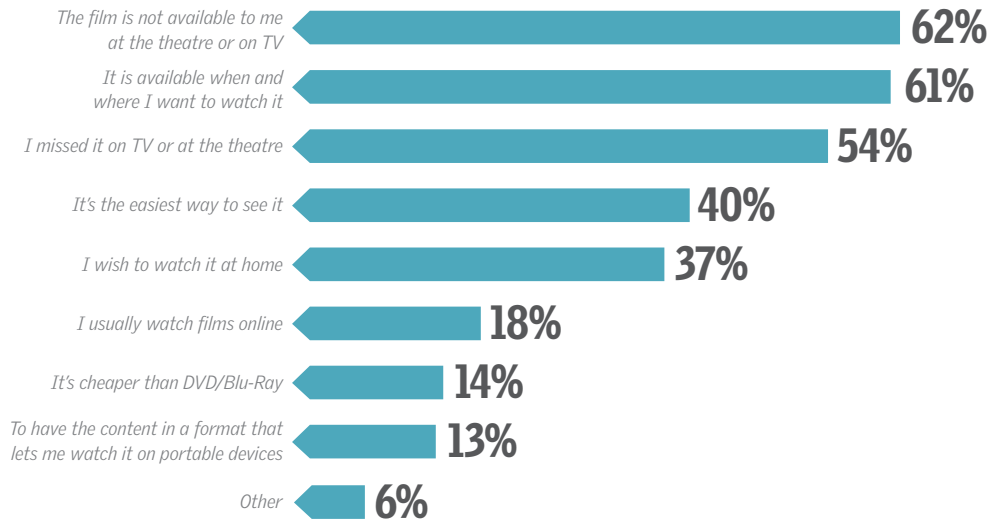
FIGURE 10: ONLINE VIEWING OF DOCUMENTARIES, BY AGE



2.9 Access and Convenience Are Main Reasons for Online Viewing

When asked the reasons for watching documentaries online, 62 per cent of respondents said that the film is not available to them in the theatre or on television, and 61 per cent said that the documentary is available when and where they want to watch it.

FIGURE 11: REASONS FOR WATCHING A DOCUMENTARY ONLINE



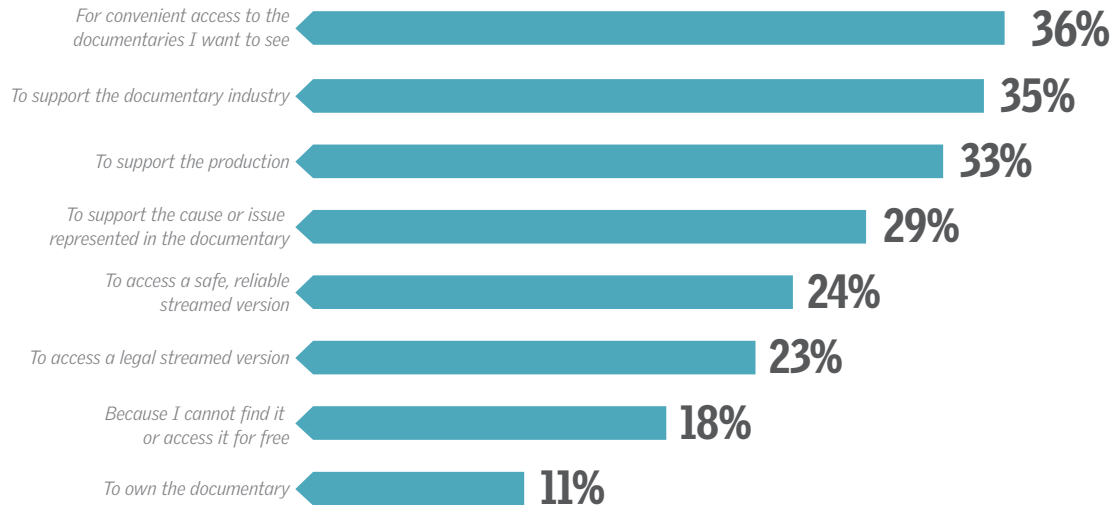
When asked to select amongst a range of reasons for watching documentaries online for free, 51 per cent of respondents said that some documentaries are not available any other way but online.

FIGURE 12: REASONS FOR WATCHING DOCUMENTARIES FOR FREE ONLINE RATHER THAN PAYING



Convenient access and a willingness to support the documentary industry are the most common reasons selected for why respondents pay to watch a documentary streamed or downloaded from the Internet. Twenty-three per cent of respondents pay because it is important to them to access a legal streamed version of a documentary.

FIGURE 13: REASONS FOR PAYING TO WATCH DOCUMENTARIES ONLINE



2.10 Social Issues, Arts and Culture Are Primary Areas of Interest as Are POV Docs

Documentary audiences are interested in a wide range of topics. Documentaries that feature social issues are most popular, followed by arts and culture. Twenty-nine per cent of viewers said they would pay to watch a documentary online to support the cause or issue featured in the documentary.

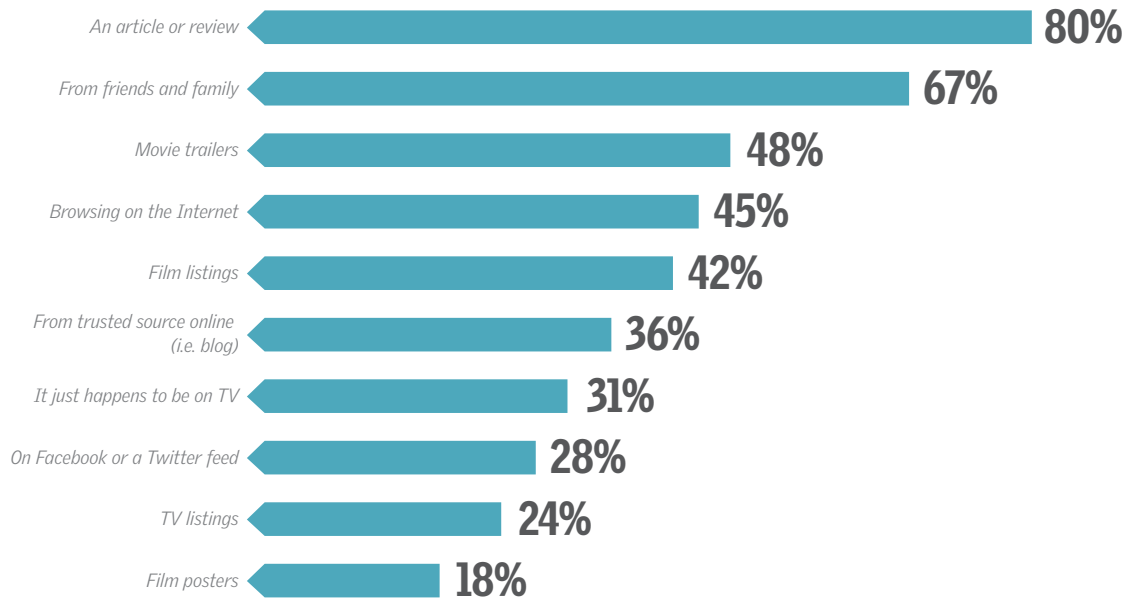
Point of view documentaries (POV), also called auteur documentaries, are being watched by 70 per cent of documentary audiences overall.

Few differentiators were found amongst respondents with respect to their preferred documentary subjects.

2.11 Articles, Reviews and Word of Mouth Are Most Important for Discovering New Documentaries

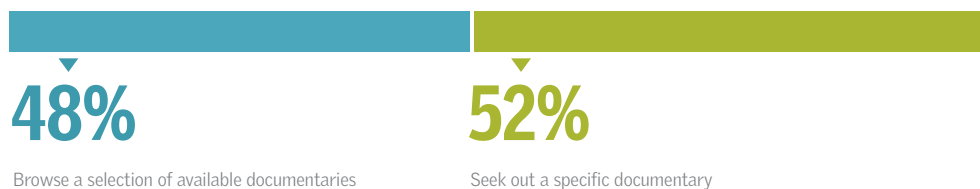
The great majority of respondents (80 per cent) learn about documentaries from an article or review, which can be online, on the radio, in a newspaper or magazine, or on television. Two-thirds discover documentaries through word of mouth, while just under half identified movie trailers—at the cinema, on television or online—as a means of finding out about documentaries. Forty-five per cent of respondents discover documentaries while browsing on the Internet. Just under one-third of respondents discover documentaries through social media, on Facebook or through a Twitter feed. A small number (less than two per cent) mentioned film festivals and film festival catalogues as sources of information on documentaries that help them to discover documentaries they want to watch.

FIGURE 14: HOW VIEWERS DISCOVER DOCUMENTARIES



Outside of theatrical viewing, when viewing on television, on DVD or Blu-Ray disc, or streamed or downloaded from the Internet, audiences are almost as likely to browse available selections as they are to seek a specific title they have heard about.

FIGURE 15: SEEKING VERSUS BROWSING FOR DOCUMENTARIES WHEN VIEWING AT HOME

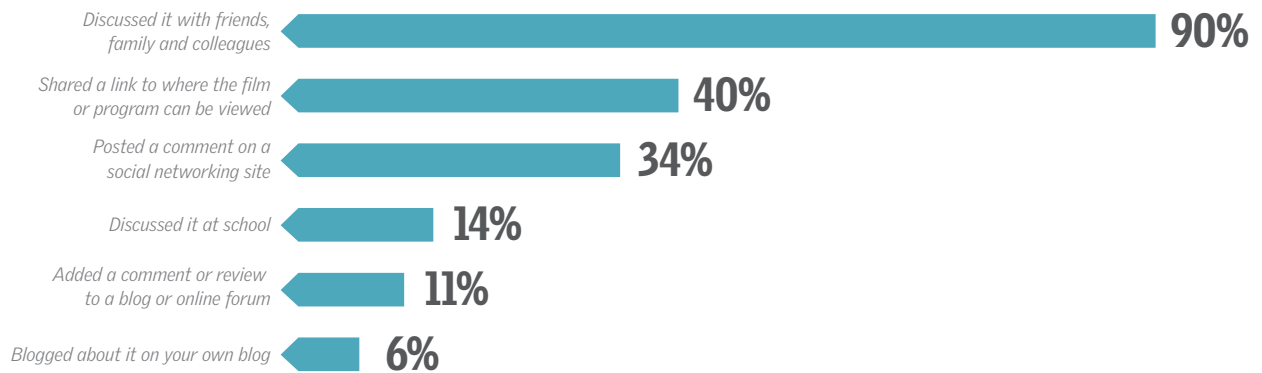


2.12 Documentary Audiences Share Their Viewing Experiences

The vast majority of respondents (90 per cent) said they have shared their documentary viewing experiences by discussing them with friends, family and colleagues. Indeed, 98 per cent of viewers said that documentaries make them want to talk about the issues portrayed with their friends and family.

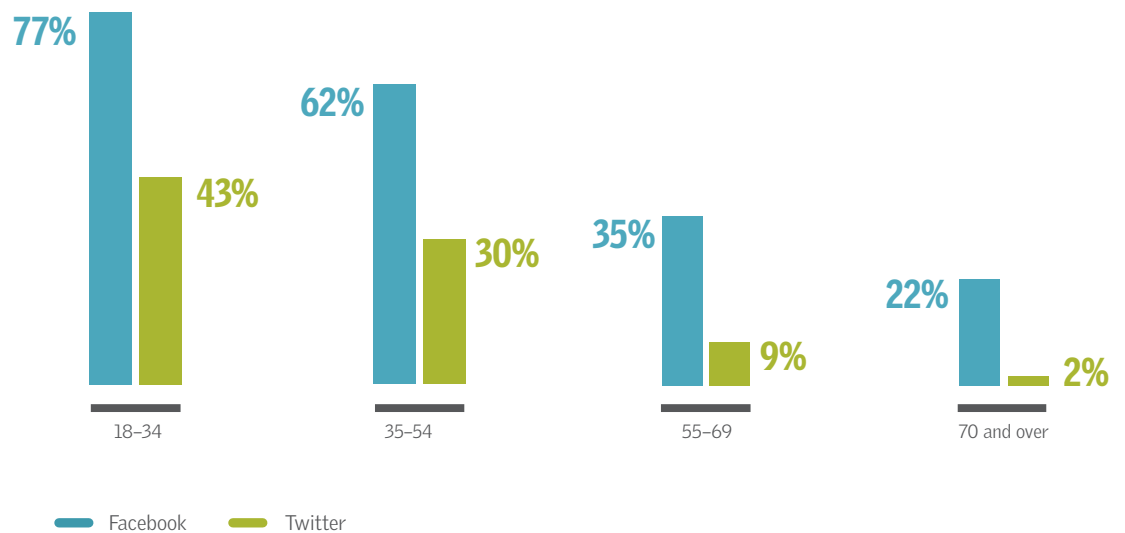
Over two-thirds of respondents have gone online to learn more about a documentary that they have watched. Forty per cent of viewers share links to the film online, and one-third (34 per cent) have shared through social media.

FIGURE 16: HOW RESPONDENTS SAY THEY SHARE THEIR DOCUMENTARY VIEWING EXPERIENCES



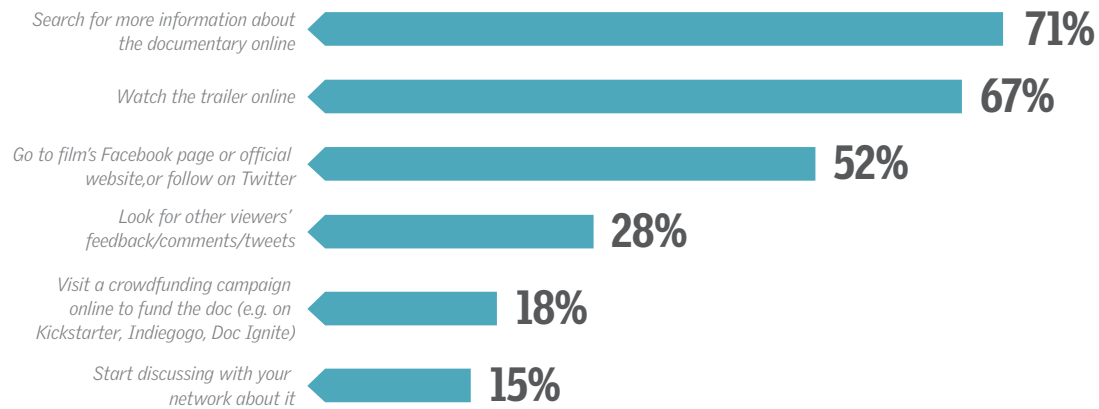
Younger respondents were more likely to share their documentary viewing experiences through social media. Seventy-seven per cent of respondents aged under 35 said they have posted or liked information about a documentary on Facebook, and 43 per cent did so on Twitter.

FIGURE 17: SHARING DOCUMENTARIES THROUGH FACEBOOK AND TWITTER, BY AGE



After seeing friends on Facebook "like" the page of a documentary, or post something about it on Twitter, 71 per cent of respondents said they search online for more information about the documentary. Sixty-seven per cent said they watch the film's trailer. Fifty-two per cent said they visit the film's Facebook page or follow it on Twitter. Fifty-two per cent said they visit the film's Facebook page or follow it on Twitter. Fifty-two per cent said they visit the film's Facebook page or follow it on Twitter.

FIGURE 18: HOW VIEWERS ENGAGE WITH DOCUMENTARIES THEY LEARN ABOUT THROUGH SOCIAL MEDIA

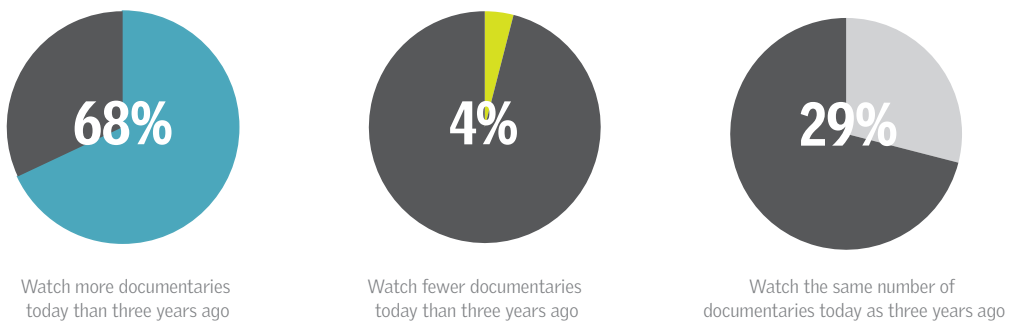


Younger respondents are more likely to be engaging online. For example, 79 per cent of 18-34 year olds said they watched a trailer online, as compared to 51 per cent of 55-69 year olds and 38 per cent of those 70 and older.

2.13 Documentary Viewing Has Increased in the Past Three Years

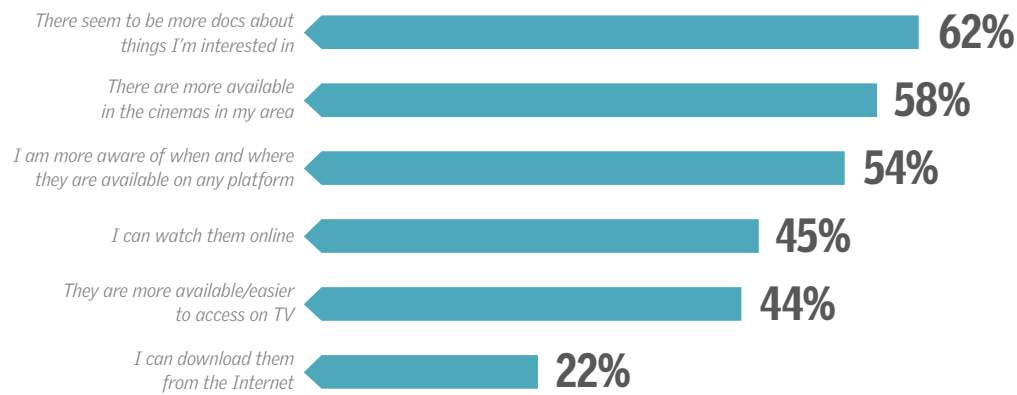
As compared to three years ago, the majority of respondents (68 per cent) say they watch more documentaries today.

FIGURE 19: LEVEL OF DOCUMENTARY VIEWING TODAY AS COMPARED TO THREE YEARS AGO



When asked the reasons for viewing more documentaries, 62 per cent of these respondents agreed that they find that there are more documentaries available about things they are interested in. The figure below shows this and other reasons that audiences who view more documentaries today gave as the reasons for doing so.

FIGURE 20: REASONS FOR HIGHER LEVELS OF VIEWING



There is great appetite for documentaries amongst viewers surveyed. Fifty-six per cent of respondents said they would watch more documentaries if they had more information on documentaries they might be interested in.

FIGURE 21: REASONS THAT DRIVE GREATER VIEWERSHIP OF DOCUMENTARIES



Respondents also said they would watch more documentaries if there was increased availability. Fifty-four per cent of those surveyed are interested in increased availability at the theatre, while 43 per cent would watch more if they were available through their subscription VOD service.

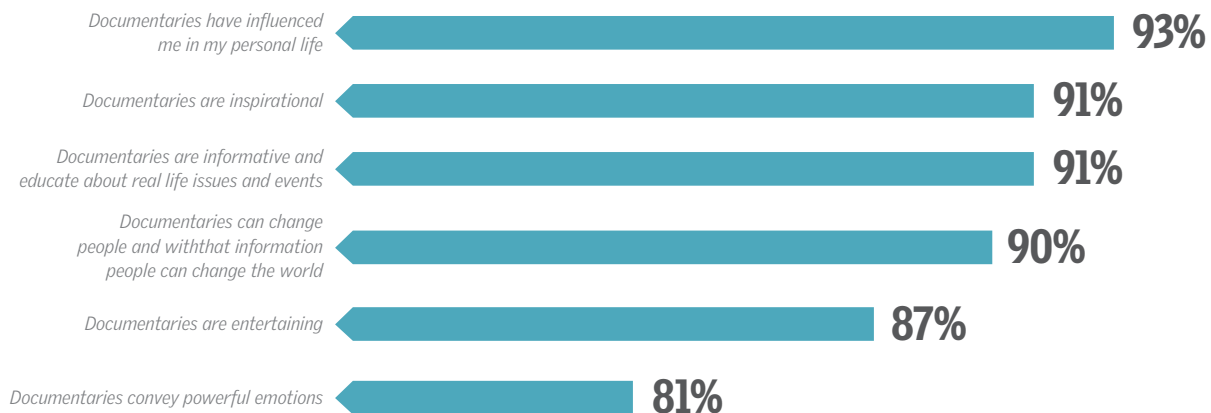
FIGURE 22: PERCENTAGE OF AUDIENCES WHO WOULD WATCH MORE DOCUMENTARIES IF MORE WERE AVAILABLE, BY PLATFORM



2.14 Participants in the Survey Strongly Agree on the Beneficial Impacts of Documentaries

When asked about the impact of documentaries, respondents overall agree and strongly agree with a range of benefits, from exerting influence over their personal lives, educating and informing them, and as catalysts for change in the world at large. Respondents also agree that documentaries are entertaining and convey powerful emotions.

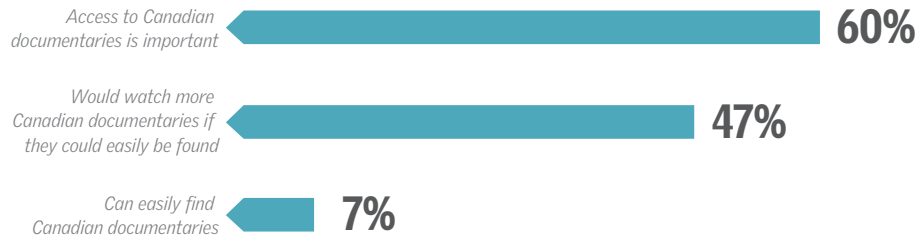
FIGURE 23: PERCENTAGE OF RESPONDENTS WHO STRONGLY AGREE AND AGREE WITH THE PERCEIVED IMPACTS OF DOCUMENTARIES



2.15 Access to Canadian Documentaries Is Important Though Few Can Easily Find Them

While 60 per cent of respondents say access to Canadian documentaries is important, only seven per cent say they can easily find them. Forty-seven per cent say they would watch Canadian documentaries if they were available to them.

FIGURE 24: ATTITUDES TOWARD CANADIAN DOCUMENTARIES



B. UNDERSTANDING DOCUMENTARY AUDIENCES: MARKET SEGMENTS, PREFERENCES AND ATTITUDES

1. Preamble

This section profiles three documentary audience segments identified through our analysis of the results of the national online survey.

The audience segments were derived from a statistical analysis of the responses received to the online survey. By querying the data we were able to identify a number of differentiating factors that allowed us to group the responses into three distinct segments.

2. Three Market Segments: Connected Super Users, Discerning Documentary Lovers and Traditionals

Overall, documentary audiences surveyed for this report are enthusiastic consumers of documentaries on all platforms and in all formats. They are socially engaged and socially interested, considering documentaries to be an important source of information and resource for lifelong learning. Audiences for documentaries surveyed for this report participate in all forms of culture, from reading books, magazines and online publications to visiting museums and galleries and attending live performing arts. Nearly two-thirds consume culture via digital technologies, including tablets, computers and game consoles.

There is untapped demand amongst audiences surveyed for greater access to documentaries on all platforms. There is interest in greater availability of documentaries in cinemas and through subscription VOD services. Viewers are also interested in knowing more about where to find documentaries that they want to watch online.

Our analysis has identified three different audience segments from amongst survey respondents: the younger, more tech-savvy Connected Super Users; the slightly older, middle-aged, busy but engaged Discerning Documentary (Doc) Lovers; and the older, more relaxed, Traditionals. These are described in the pages that follow.

Overview: Connected Super Users (43 per cent)

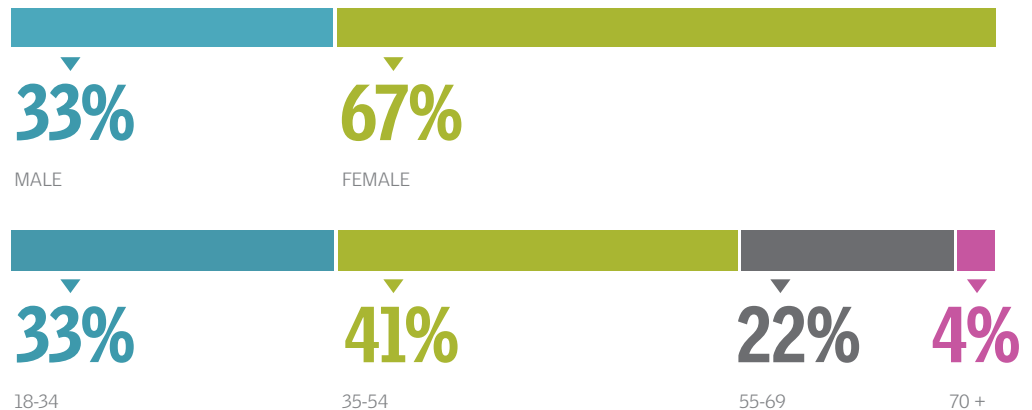
Who They Are

Connected Super Users are the youngest cohort of documentary audiences, with the largest contingent of under-35 year olds.

Representing 43 per cent of those surveyed, this group is the most wired of the audience segments. Its members are the greatest consumers of documentaries and of docs online. They are also most likely to read books or magazines online or on a tablet, and to play videogames. Seventy-seven per cent use social media.

Eighty per cent have a university degree. Fifty-three per cent of member of this group have total household incomes of less than \$75,000 per year. One-third are men, proportionally higher than the number of men who answered the survey. This group has the highest proportion of families with young children.

DEMOGRAPHIC PROFILE



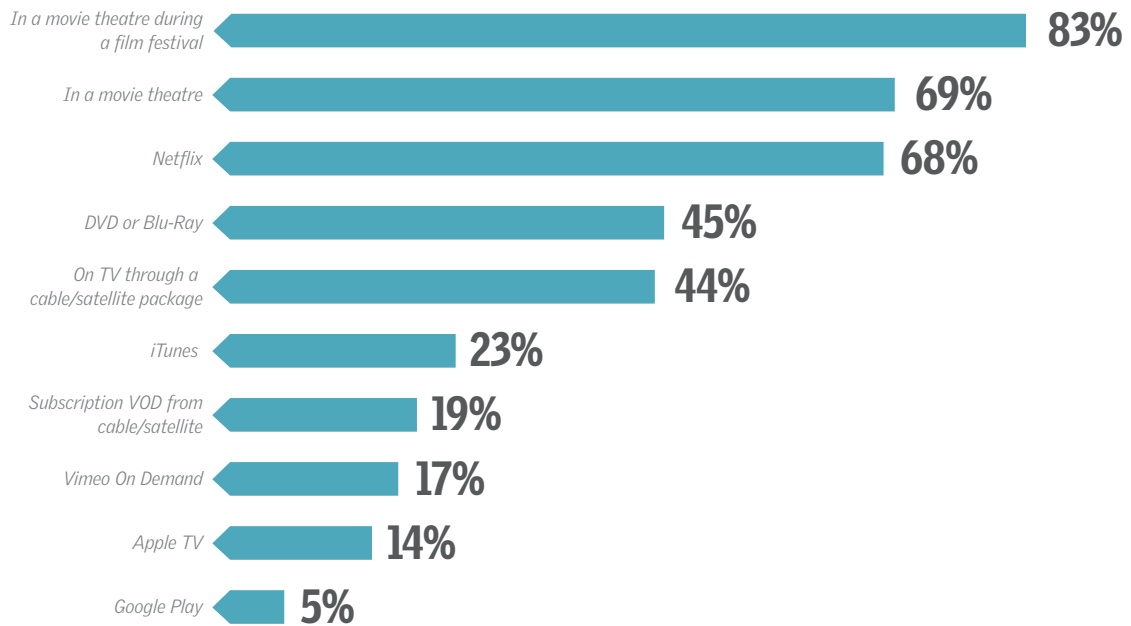
How They Watch

Ninety-seven per cent of this group are watching documentaries at least twice per month, and over half of these watch at least three times per month.

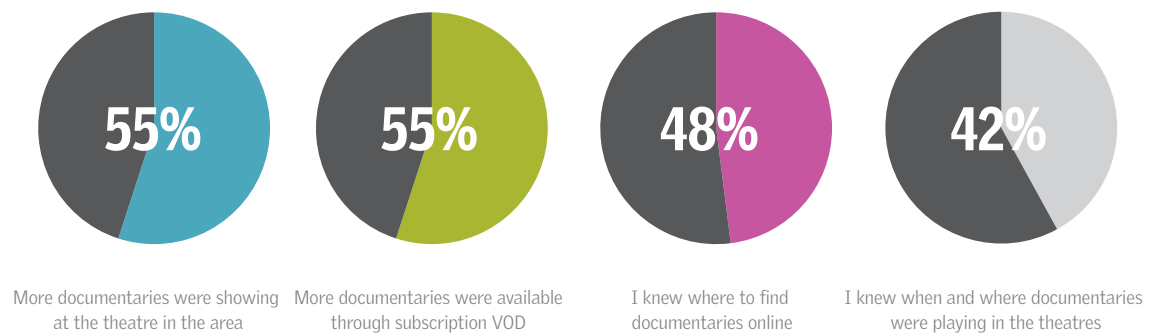
They are more likely to watch POV docs, short docs and feature-length documentaries. They like to watch docs at the theatre and are avid festival goers. They are also more likely to watch docs while travelling or in a classroom.

At the same time, Connected Super Users are big at home viewers. Almost everyone (99 per cent) in this group is watching docs at home, whether on TV, disc or online. They are the greatest adopters of Netflix (68 per cent) and of online pay per stream or download services: 23 per cent watch on iTunes, 17 per cent Vimeo On Demand, 14 per cent Apple TV and five per cent Google Play.

WHERE THEY WATCH



WOULD WATCH MORE DOCS IF...



Why They Watch Where They Do

This group is more likely to give as the primary reason for viewing docs online that it is for the convenience of watching when and where they want.

Similarly, the reason most likely for watching more docs today than three years ago is because they can watch them online. They tend to know where to find the docs online that they want to view. They tend to view for free primarily because many documentaries are available for free online, and some are not available any other way.

These viewers are also likely to pay to view online primarily for convenient access when and where they want to watch.

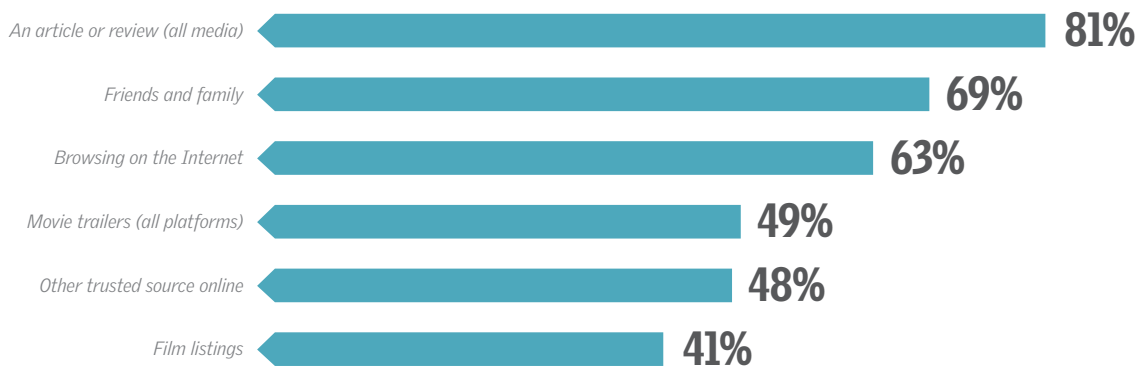
Connected Super Users would be likely to watch more documentaries if more were playing in local cinemas. They are also like to wish for greater access through their subscription VOD service, which is primarily Netflix.

How They Discover and Share

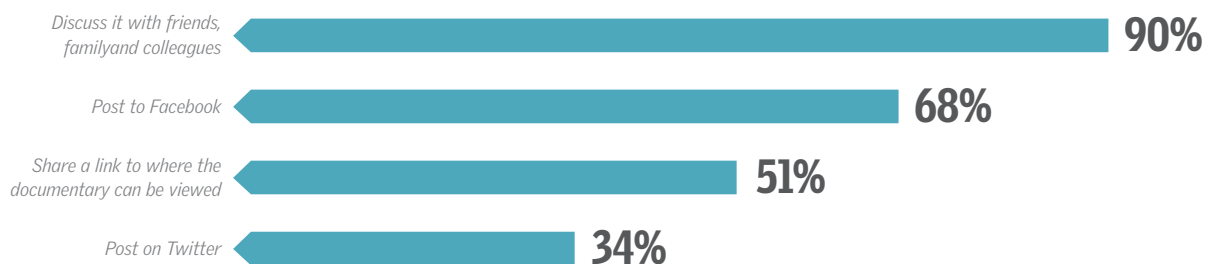
Connected Super Users tend to be highly social, sharing docs through word of mouth and on social media. As a younger group overall, they are more likely to share on social media than other audience segments, and to follow the links to a documentary that others share with them.

After articles or reviews and friends and family, browsing on the Internet is an important way that this group discovers documentaries.

HOW THEY DISCOVER



HOW THEY SHARE



Overview: Discerning Doc Lovers (43 per cent)

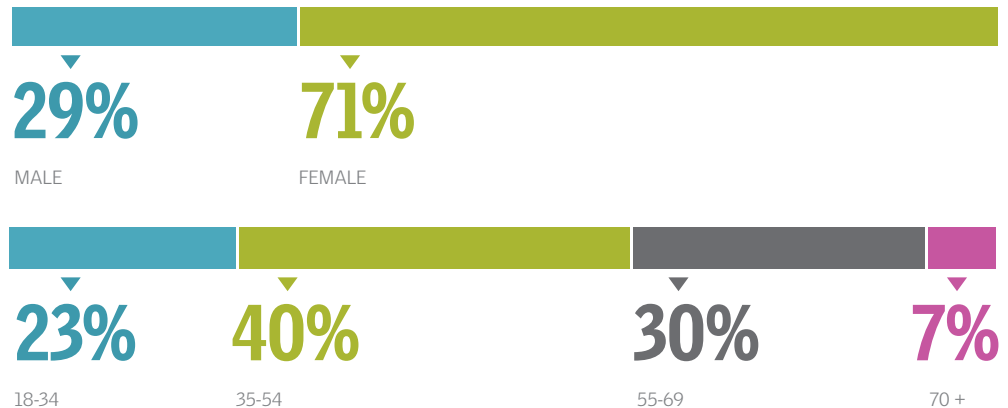
Who They Are

Discerning Doc Lovers reflect the middle bracket of age cohorts, with 40 per cent of members of this group aged 35 to 54 years old. Eighty-three per cent of Discerning Doc Lovers have a university degree, half of them graduate degrees. Twenty-nine per cent are men, the same proportion that responded to the survey.

Discerning Doc Lovers represent 43 per cent of those surveyed. They tend to consume a lot of documentaries, primarily at the theatre and on TV. They sometimes watch documentaries online, though not more than a few times per year.

Their median household income is \$75,000 per year. This group has the highest proportion of families with older children.

DEMOGRAPHIC PROFILE



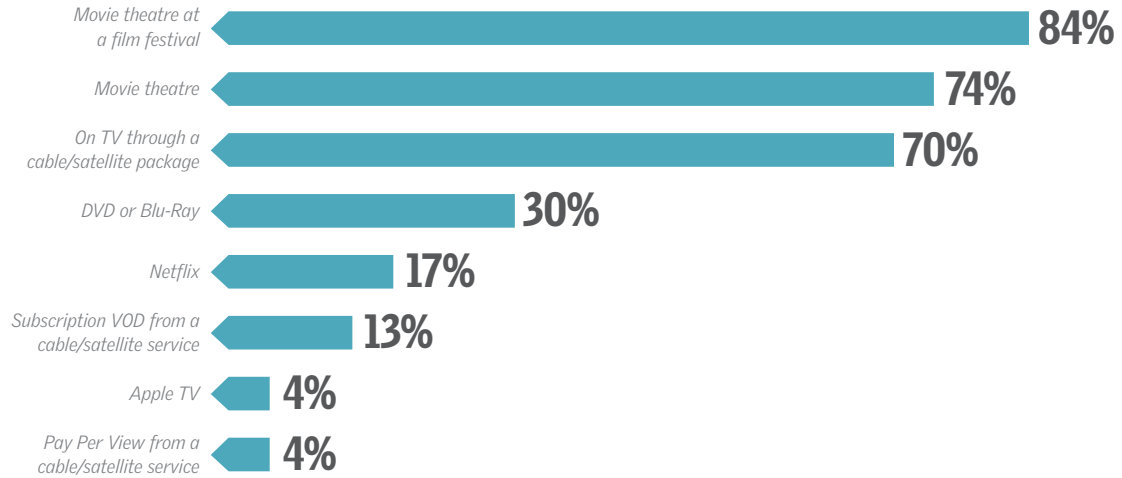
How They Watch

The majority (62 per cent) of Discerning Doc Lovers watch documentaries at least twice per month. They tend to like the same kinds of docs as the Connected Super Users, but watch fewer short documentaries.

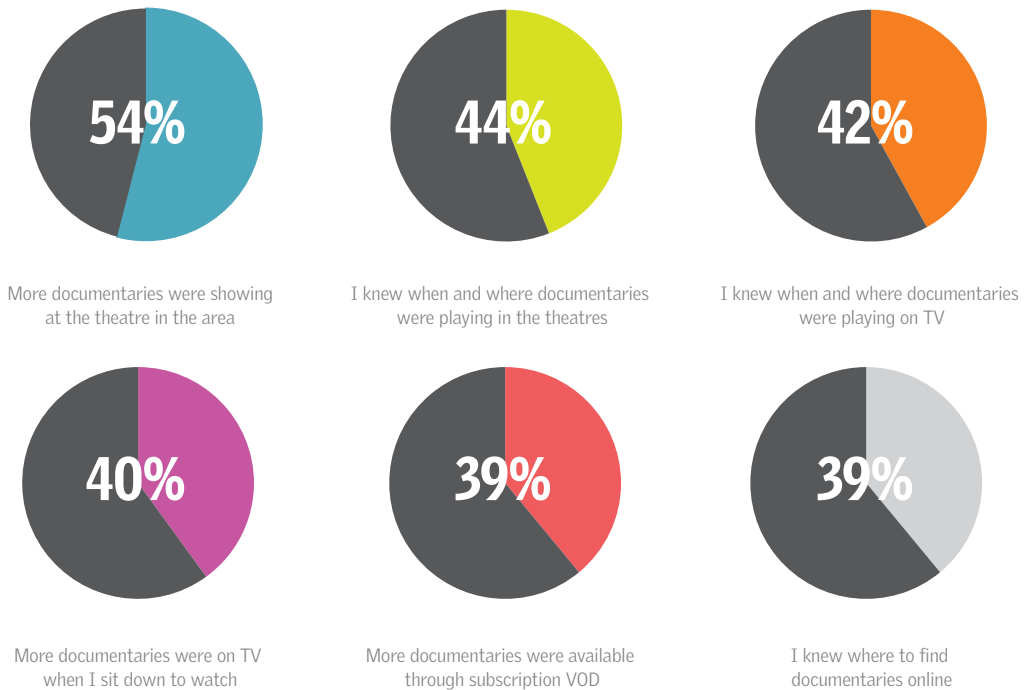
They tend to be avid festival goers and like to watch docs at the theatre. They would watch more documentaries if more were playing in local cinemas. Ninety-four per cent are watching docs at home, primarily through their TV cable or satellite service provider. About half subscribe to Netflix while a significant minority access docs through Apple TV and iTunes.

This group is interested in greater access to documentaries through their subscription VOD service. They would likely watch more documentaries if more were playing in local cinemas.

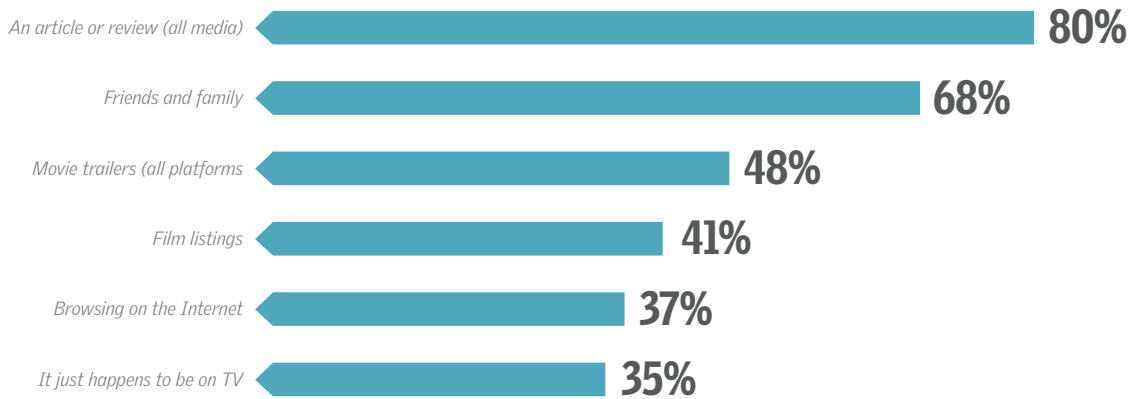
WHERE THEY WATCH



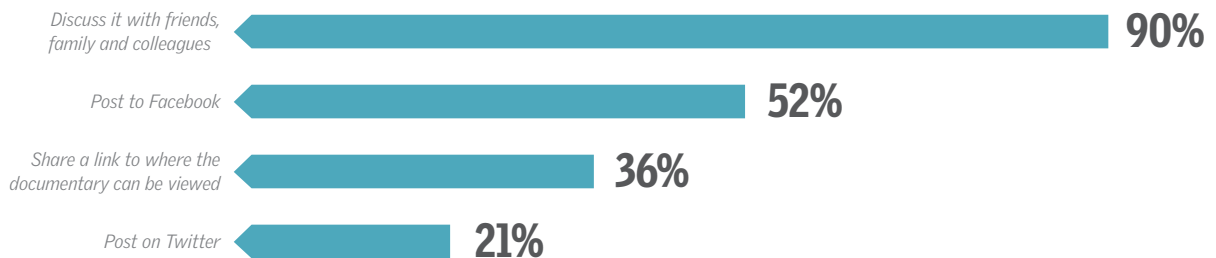
WOULD WATCH MORE DOCS IF...



HOW THEY DISCOVER



HOW THEY SHARE



Why They Watch Where They Do

Discerning Doc Lovers are watching more documentaries today than three years ago and are likely to give as the reason because there seem to be more that they are interested in and more are playing in local cinemas.

They are likely to give as their primary reason for viewing documentaries online that it is to access films or programs that are not available at the cinema or on television. They tend to appreciate the convenience of being able to watch when and where they want and are willing to pay to stream or download online for convenient access.

How They Discover and Share

This group would likely watch more docs if they had more information on those that could be of interest to them.

When watching online they tend to be seekers rather than browsers. They tend to know which films they want to see, but don't always know where to find them. They would watch more docs online if they knew where to find them.

Film listings are another important source of discovery for these doc lovers.

While over a third don't use any social media, for others, Facebook and Twitter are means of sharing on docs.

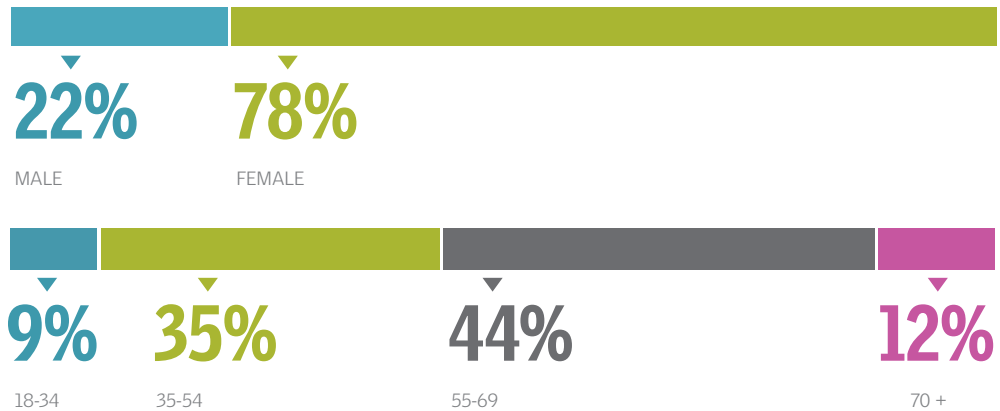
Overview: Traditionals (14 per cent)

Who They Are

Traditionals, representing 14 per cent of those surveyed, are the oldest of the three segments, with 44 per cent of viewers aged 55 to 69 and 12 per cent aged 70 and over. Traditionals consume a lot of documentaries, but they never watch documentaries online, over the Internet.

They are more likely to prefer to go to the movies and to watch documentaries on TV. This group has the smallest proportion of people consuming culture on digital platforms. They tend to like to read print media and only 39 per cent use social media. Men make up 22 per cent of this group. This group has the largest proportion of people living alone (39 per cent). Their median household income is \$75,000 and 78 per cent have a university education.

DEMOGRAPHIC PROFILE



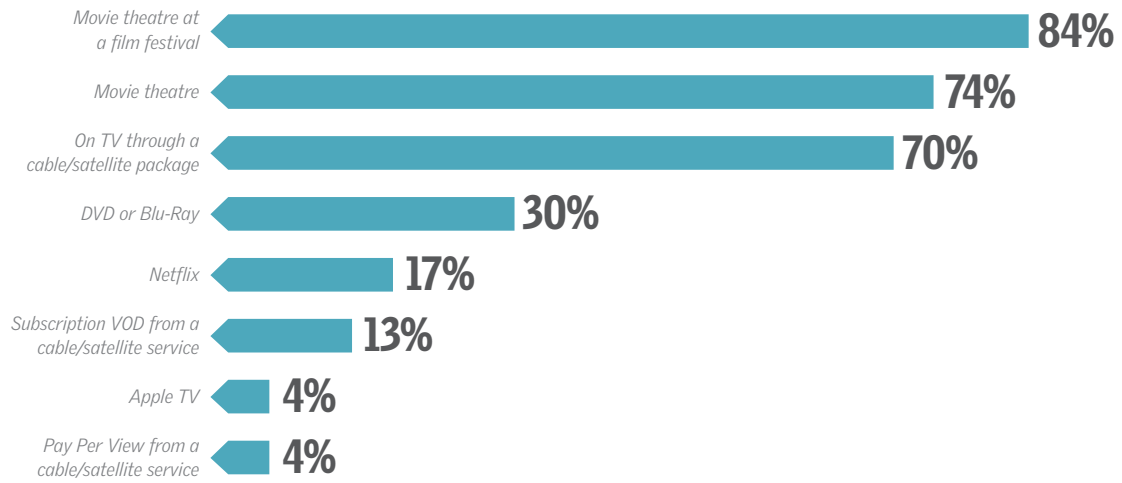
How They Watch

Traditionals tend to consume a lot of documentaries, with 64 per cent of viewers watching docs at least twice per month.

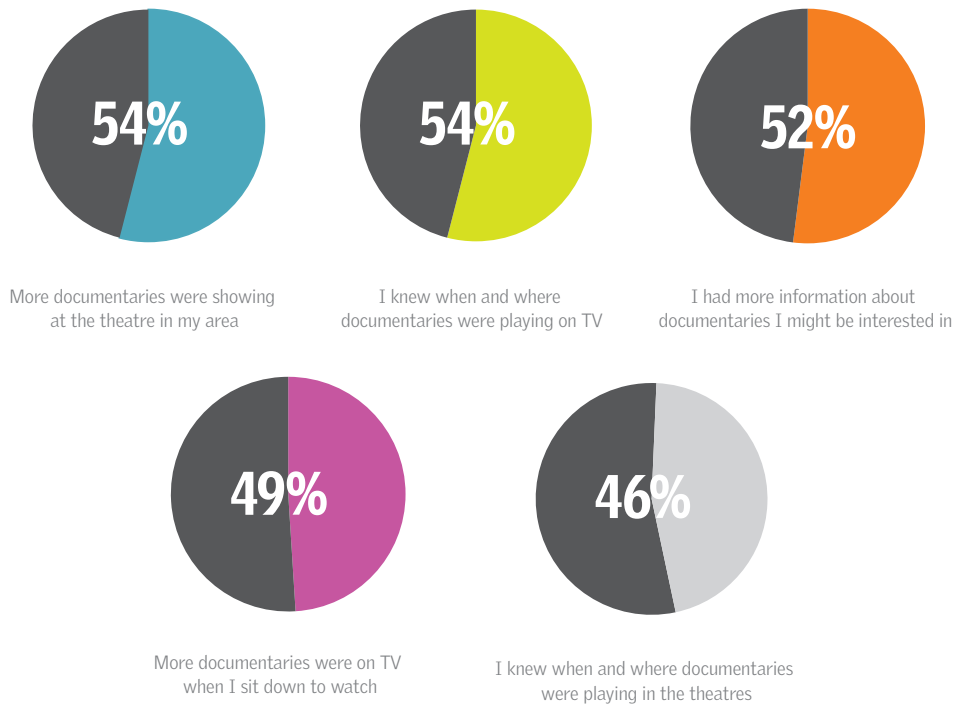
Likely to be avid festival goers, they tend to like to watch docs at the cinema and at home, watching primarily feature-length and TV documentaries.

Eighty-six per cent of this group watch docs at home, primarily through their TV cable subscription service. Few are using "over the top" subscription VOD services such as Netflix (17 per cent), and Apple TV (four per cent).

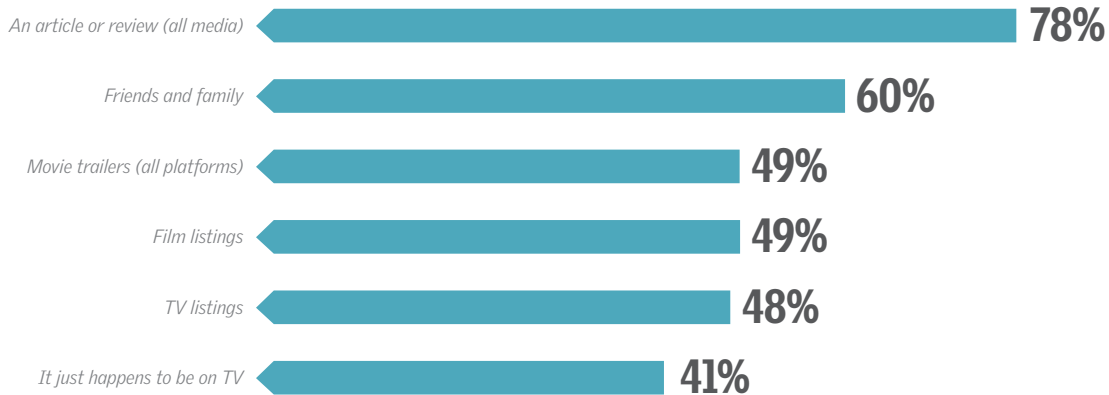
WHERE THEY WATCH



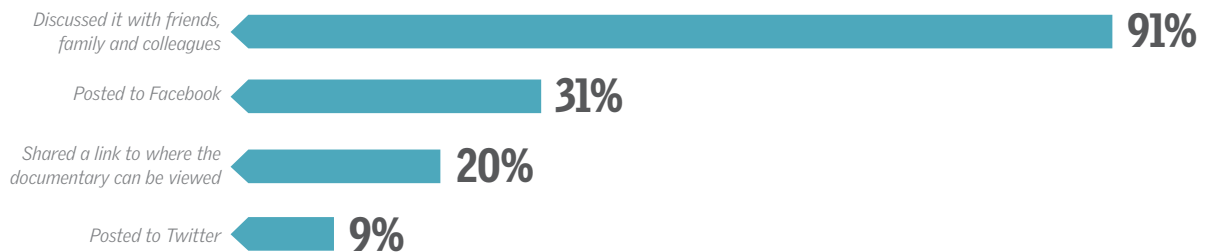
WOULD WATCH MORE DOCS IF...



HOW THEY DISCOVER



HOW THEY SHARE



Why They Watch Where They Do

Theatrical viewing is important to Traditionalists. They watch more docs now than three years ago, and are likely to give their primary reason as because more are available in cinemas. They are interested in the social aspect of theatrical viewing and are likely to say they would watch more docs if more were playing in cinemas.

A key reason for watching on TV is that docs happen to be playing when they sit down to watch. They would likely watch more if they had more info on when and where they are playing on TV.

How They Discover and Share

Few Traditionalists engage in online sharing or discovery. They tend to prefer to seek out traditional sources of information to discover documentaries, including articles and reviews, friends and family, film and TV listings, as well as casual viewing on TV.

Traditionalists are more likely to visit the official website of a film and to go online to learn more about the topic after seeing the film. They are less likely to share their experience on a social media network.

C. QUALITATIVE INSIGHTS ON THE FACTORS THAT INFLUENCE PARTICIPANTS' DECISIONS TO ACCESS AND PAY FOR DOCUMENTARIES

1. Preamble

The goal of the focus groups was to gather qualitative information from documentary enthusiasts in order to gain a deeper understanding of attitudes towards and factors influencing viewers' decisions to watch documentaries, including the transactional habits and preferences of documentary audiences.

This qualitative research component was participatory and based on a number of innovative game-based techniques that were used to probe deeper into the themes emerging from the groups. For example, by taking turns to "remember themselves in the future," participants offered insights into the impact that documentaries have had in their lives and what they value about them, as discussed in Section 2, below.

The mapping exercise "start your day," in which participants mapped out a typical day's viewing facilitated discussion of viewing habits and preferences, provided insight into the types of discovery and viewing experiences being sought by participants. As described in Section 3, recommendations from trusted sources and trailers drive awareness and the decision to watch. Participants expressed a preference for watching on the big screen, particularly in a shared experience. They also appreciate curated selections in cinemathèques and festivals and convenient access to documentaries in theatres through convenient scheduling choices or through on-demand viewing on television and online platforms.

These findings with respect to impact, discovery and viewing preferences provide valuable insight to support the marketing and sale of documentary viewing experiences. They can and should be used in conjunction with findings on what motivates the decision by documentary audiences to pay to view documentaries. For example, as suggestions emerged for improving their access to documentaries, participants were invited to "design the product box," identifying important features that would drive their transactional choices.

As discussed in Section 4, participants identified a preference for the Netflix subscription model, which provides unlimited viewing access to a selection of films for a moderate monthly fee. The Netflix model extends to participants' appreciation for the service's searchable catalogue and the way it pushes new viewing suggestions based on subscribers' viewing activity.

Some participants expressed a willingness to pay on a per view basis for convenient access to documentaries they otherwise cannot see. Participants often expressed frustration at not being able to see documentaries they had taken an interest in and having convenient and timely access was found to be an important factor in their decision to pay to watch a documentary on a transactional basis.

The audience segments were derived from a statistical analysis of the responses received to the online survey. By querying the data we were able to identify a number of differentiating factors that allowed us to group the responses into three distinct segments.

2. Audiences Place a High Value on Their Documentary Viewing Experiences

As revealed through the focus groups, documentaries are viewed as having a unique role in terms of their impact on the participants and the value that they assign to them.

Participants in the focus groups described documentaries as moving and inspiring them, exciting their emotions and intellect and influencing their lives. Many focus group respondents referenced films that opened their eyes to issues, lives, people and places. They described the ways in which documentaries helped them understand issues, history, their identity, relationships and society in general.

Participants believe that all kinds of documentaries in terms of subject matter and format have value for them. On the whole, participants said they watch documentaries because they encourage critical thinking, are an important source of valued information and support learning and are valued for their capacity to entertain.

One of the many rewards perceived with documentary viewing is critical engagement with ideas and issues, sometimes with life-long effects.

- *"The memorable ones are the ones that make you think rather than make you learn."*
- *"Documentaries plant seeds."*
- *"Documentaries make me think about my own life."*
- *"Documentaries are so powerful. They have a real visceral effect on me. They go inside of me and live inside of me and for that period of time I want to shake the world up, shake everybody I talk to and say, 'This is really important.'"*

Participants value Canadian perspectives and are interested in documentaries as an important source of in-depth information and analysis.

- *"I love documentaries because they provide depth."*
- *"Documentaries inform more than if I just read about something."*
- *"Documentaries are like long-form journalism that you don't get to see anywhere else."*
- *"Documentaries inform public discussion."*
- *"There are things that need a Canadian perspective to be understood in this country."*

Participants seek learning experiences and enjoy the discovery process afforded by documentary viewing. Younger and older audiences alike appreciate opportunities to learn about the wider world.

- *"Documentaries have an impact on my life. Watching them opens my mind to how the world is, the different cultures. It gives me the desire to travel. I can't really go all over the world, but I can learn about many cultures."*
- *"I discovered documentaries when I was young when I found one on war crimes.... I wanted to know more."*
- *"I love going to watch documentaries about things that I know nothing about."*
- *"I love... being able to expand my horizons."*

Participants are watching documentaries to be entertained, identifying with the characters portrayed and experiencing satisfying emotional connections.

- *"Documentaries make you discover the story and events as the subjects are living them. This is powerful."*
- *"Documentaries create emotional connections."*
- *"If we're taking the time to watch something, we want to be entertained."*

3. Factors That Influence Decisions to Watch Documentaries

3.1 Recommendations From Trusted Sources Drive Awareness and Decisions

Focus group participants discover and share documentaries in many different ways, via word of mouth or by posting a review online, or tweeting or sharing with friends, colleagues and family. Many are both sharing and discovering documentaries through social media. Recommendations from friends and family, as well as reviews in print media or via social media networks, have a high value for participants in learning about and determining which documentaries to watch.

- *"My friends will post a documentary or they'll talk about an issue and I'll google what the issue is and then I'll find a documentary on YouTube or I'll find it on a website."*
- *"A lot of my decisions are made based on word of mouth at the office, from friends and other acquaintances, or groups. One of my problems is that Twitter has too much advertising."*
- *"Social media is number one for me to discover documentaries. Either on the Facebook pages of festivals, or filmmakers that I like, or even production companies or through word of mouth, friends or reviews."*
- *"I am on Facebook, I read reviews and I find references so I would like more like this."*
- *"I send trailers. I use social media like LiveLeak. Or on Facebook."*
- *"I sent a lot of emails about how much I liked a documentary but I'm not on social media."*
- *"I'll write a long-form review on a website to support it. Championing via social media, Twitter, etc."*

On the whole, participants seek out others to help them filter the overwhelming amount of information available through multiple platforms to decide which documentaries to watch. Sources trusted to filter information include friends and family, bloggers and reviewers, and festival catalogues.

- *"There is so much information. If someone I trust recommends it, then I will go see it."*
- *"I tweet actively. I rely on that. When I get a chance to sit down and actually scour my Twitter feed, I follow journalists, writers and film lovers. I also use Facebook, Instagram and others."*
- *"I go to film festivals. I look on social media for doc programmers. I also rely on friends and Netflix."*
- *"I'm of that generation that grew up in a one-channel universe in a small town.... I find CBC, both radio and TV, is a great source for information about documentaries."*

3.2 Audiences Seek Out Reviews From Trusted Sources

Focus group participants place a high value on trusted reviewers to determine which documentaries to watch, and in particular for paid viewing in theatres and at festivals. Audiences retain favourably reviewed titles that are of interest to them to view later, when the opportunity arises.

- *"I read reviews in the newspaper. I go to the Internet archive. I go to LiveLeak, YouTube."*
- *"I use iTunes podcasts. A lot of my recommendations are through film podcasts."*
- *"I like to read the reviews. I have access to the New Yorker. I read the Herald reviews. I like the Herald. But I'm also into word of mouth. I don't do social media. That's for my kids."*
- *"I visit sites and critics that I trust, like on Rotten Tomatoes, Roger Ebert. Those are great places to find out about films. But I go to sites for specific long-form reviews."*
- *"A good source would be review aggregates like Metacritic or Rotten Tomatoes. I'll look at the professional critics who have reviewed it, and I'll recognize that name, and I'll read it."*
- *"I read reviews, critics. All you need is YouTube and there's Netflix. But I don't want to waste hours so I like to read about what's on Netflix and sift through that beforehand. I find an opinion I trust as a source for suggestions."*
- *"I keep a movie list on my phone—things I hear about, things I want to watch."*

3.3 Trailers Are Important to Discovering and Transacting Documentaries

Trailers are important to focus group participants in terms of discovering documentaries and play a determining part in their decision to watch documentaries. Some participants expressed a desire to be marketed to with trailers.

- *"What gets my interest are trailers. If iTunes [had more trailers], I'd be more interested."*
- *"I would like to see more advertising and trailers online like on YouTube."*
- *We are bombarded on social media and so it does not get my attention. I need to see a trailer."*
- *"I'm connected to so many different groups and people who are interested in documentaries on Facebook and Twitter. I might discover a trailer for a new film or a short explanatory video."*

3.4 The Big Screen Experience Is Important

Participants in the focus groups are attracted to the experience of theatrical viewing, which factors into their decision to watch documentaries at the theatre. The "big screen" or "cinematic" experience was noted by focus group participants as important to fully appreciating certain documentaries that were created for the big screen. For many participants, the big screen experience is aesthetic.

- *"I've always preferred watching on the big screen. I'll go to the Cinematheque or the repertory theatre. I will always favour that."*
- *"I don't like small screens. For movies, and full features as well, I want a giant, full-screen experience."*
- *"I watch documentaries online but if I had my preference it would be to watch them on the big screen."*
- *"I like to see them on the big screen. I don't watch a lot of TV. I go to festivals."*

Social contact and sharing is a valued part of the experience of watching documentaries in theatres and at festivals, which drives many decisions to watch films at the theatre. Participants are interested in sharing their views on the documentary, in meeting with filmmakers and in socializing with others.

- *"I go to the film festival because I love film. I'm inspired by the filmmakers. Standing in line, people start talking and sharing. It's part of the experience."*
- *"Definitely the big screen... because you're part of the experience of a lot of people viewing it. There's the interaction afterwards. There's the sharing... talking about it."*
- *"I prefer to see documentaries in the theatre. I think it's a powerful way to get the message [of a film] out there for social justice documentaries."*
- *"There are maisons de la culture... and they have evenings where there is a projection and then afterwards there is a discussion. Going to see a documentary, it's not about the popcorn. You need to talk about it afterwards. It's the discussion that's interesting."*
- *"Documentaries bring people together.... People need to connect."*
- *"Ten per cent of documentaries I watch are on Netflix, but mostly I go to the theatre."*

3.5 Audiences Seek Curated Selections and Ease of Use on All Platforms

Focus group participants said they place a high value on curated selections, and look to trusted sources to filter the documentaries they are interested in and where to find them on all platforms.

In today's world, where many lead busy lives with limited free time, participants are looking for convenience when deciding to attend a theatrical screening. Flexible scheduling that affords a number of opportunities to view films drives decisions to view films theatrically.

Many focus group participants said they appreciate the convenience of curated series being offered by organizations such as the Bloor Hot Docs Cinema, local cinémathèques, the maisons de la culture (in Quebec) or through special screening series such as Doc Soup. Some consider that there is too much information to navigate in order to be able to access documentaries and are comfortable with subscription-based services such as Netflix, or their cable or satellite service provider. Some appreciate being pushed suggestions based on their viewing activity.

- *"In the perfect world, there would be one website that contains a list of every single documentary that's ever been made, and a synopsis, and where you can go watch it, instead of getting multiple newsletters from multiple places. I don't have time to go do the research. Just surprise me."*
- *"I want one source, rather than having to constantly filter things. If Hot Docs had a broad calendar, that would help. They are my one-stop source."*
- *"As a teacher, I spent countless hours on Pinterest getting things for the classroom, but I find it very difficult to find something that's appropriate to use. I have started to use NFB to search. But if I could type in the age group, and have them send me something, that would make it easier."*
- *"We all want our information instantaneous. Netflix gives that."*
- *"I don't spend a lot of time on the Internet, so a lot of my viewing habits come through TV.... I also do DVR, CBC Doc Zone and Netflix."*
- *"Every week if I had a documentary or two I could go see, and I had some options, I would prefer that. It's easier to schedule around something like that."*
- *"I really like Doc Soup... the frequency of one per month so I can plan well ahead."*
- *"I rely on Doc Soup—I have no time for Twitter or other social media after work."*
- *"For Facebook and YouTube, they have advertising and trailers. If I am watching a particular channel, they will advertise other videos from that channel. I would like it more if they showed me more from all over."*
- *"Once you have made choices, Netflix also suggests further choices on similar topics."*

4. Transactional Preferences of Documentary Audiences and Willingness to Pay

4.1 Audiences Will Pay for Convenience and Access to Titles They Otherwise Cannot Watch, at Modest Price Points

The focus groups revealed some appetite for transactional purchases, primarily at modest price points.

Documentary enthusiasts appear willing to pay to stream or download a documentary from the Internet on a transactional basis (such as the iTunes model) if it means they can watch a documentary that is otherwise not available to them. Participants expressed frustration that they did not always have access to documentaries in which they were interested at the time the documentaries were being promoted. Some participants said they would be willing to pay for access in a timely fashion.

Participants are currently accessing documentaries online on a transactional basis on iTunes, Vimeo On Demand and, to a lesser extent, Google Play and Cineplex Store. Some participants noted that they would pay to view documentaries on a pay-per-view basis if more were offered.

Participants expressed interest in accessing documentaries at home via a subscription-based VOD service. They said they liked the flat-fee structure and current rates of "over-the-top" (unregulated) subscription services and are willing to pay for a reasonably-priced service. Netflix was cited most often as a model that they appreciate. Participants would like to see better documentary selections on SVOD services.

- *"I prefer to pay a subscription for documentaries to access them online like Hulu."*
- *"I would like to have something Netflix-style but Canadian."*
- *"I wish there was a way to access the top-20 award winners after the [Hot Docs] Festival. Maybe build up the library every year. I would happily pay for a package or bundle like Netflix."*
- *"Netflix is reasonable—\$7.99 a month."*
- *"Cable TV is expensive."*
- *"If I am paying a flat fee, I would expect unlimited access."*
- *"I would want lots of choice so I don't run out in a month."*
- *"If there was something I really wanted to see but I missed it in the theatre or it never came to the theatre, I would pay to see it, but I don't know where to go to find docs outside of Netflix."*
- *"If pay-per-view offered more documentaries, I would pay for them."*
- *"If Shaw offered pay-per-view, I would pay."*
- *"It should be \$5 per movie, like on iTunes."*
- *"Documentaries take on seasonality for me. By the time it's released, it often goes by the wayside. Wish I could bookmark it. If I don't have time, I wish I could get it. The window is small."*

4.2 Participants Use Online Portals for Free and Casual Viewing and to Access Documentaries They Cannot See Any Other Way

Viewing through online documentary portals is popular primarily because online platforms provide easy access often for free, which lends itself to casual viewing. Viewers also watch online to access documentaries they cannot see any other way.

- *"When I am on an information binge, I go and search via topic on YouTube, Reddit.com/r/documentaries and Documentary Heaven."*
- *"Vimeo is a free, basic service. Good quality. I don't even have an account. I just go on the website and see what's recommended. I check TVO and Top Doc listings as well."*
- *"YouTube is the main place. I can see a thousand documentaries."*
- *"I watch them often while I'm making art at the same time."*
- *"Recently I downloaded the thing to make it like I'm from the United States because I wanted to watch a film but it wasn't available in Canada."*

5. Summary

Focus group participants for documentaries value their viewing experiences as critically engaging, informative and entertaining. Their decisions to watch documentaries are driven by trusted sources that they use to discover documentaries, including friends and family, social media and trusted critics. For some, viewing the trailer is important prior to deciding to watch the film, while for others, the recommendation of a trusted source is enough.

In deciding to watch documentaries, focus group participants are looking for curated choices, convenient access and big screen cinematic and social experiences at the theatre.

Online documentary portals are being used primarily for free and casual viewing.

Focus group participants are willing to pay to have convenient access to documentaries in cinemas, at home through subscription VOD services offering a good selection of documentaries, and through transactional services (for example, pay-per-view or iTunes), particularly for documentaries that are otherwise difficult to access. The monthly subscription fee of a Netflix-type service would be of interest, as would be pay-per-view services in which audiences are charged for the purchase of one program only.

D. CONCLUDING OBSERVATIONS

This section provides concluding observations for the benefit of the documentary industry in Canada aimed at supporting increased discoverability and access to documentaries by Canadians.

1. Unmet Demand for Documentaries on All Platforms

Our study finds that amongst the documentary audiences surveyed for this report, there is untapped demand to watch more documentaries.

Overall, the participants in this study are enthusiastically interested in gaining access to documentaries whether on television, online or in a movie theatre. Documentaries are a valued art form and a much loved source of information, entertainment and enlightenment.

2. Insights Into the Documentary Audience: Three Market Segments

This study provides insights into understanding the motivations, preferences and interests of the documentary audience for the benefit of all those involved in the value chain of the film and television industry.

The three audience segments profiled in this study are defined as Connected Super Users, Discerning Documentary Lovers and the Traditionals.

The Connected Super Users tend to be young, tech-savvy and consume the most documentaries online. They are the audience most likely to be marketed to online and would consume documentaries being made available on paid platforms, including Netflix, iTunes and Vimeo On Demand.

Discerning Documentary Lovers tend to seek out titles they have heard of. Tending to be slightly older than the Connecteds, and more likely to have families, their biggest challenge is time and knowing where to find the documentaries they are interested in, particularly online. Well-promoted documentaries that are available through paid platforms are more likely to reach this audience segment. They are willing to pay for convenient access, but need help discovering where films are available online.

The Traditionals make up the oldest audience segment with more retirement-age viewers. Theatrical screenings that afford opportunities to share experiences with others are more likely to appeal to this segment.

3. Convenience and Timely Access for Online Viewing of Documentaries

For the documentary audiences surveyed in this study, convenience and timely access would increase their online viewing of documentaries.

A significant proportion of documentary audiences surveyed for this study (36 per cent) are paying to watch online for the convenience of watching on-demand. In addition, focus group research indicates that enthusiasts are willing to pay to stream or download a documentary from the Internet (such as the iTunes model) to access documentaries that are otherwise not available to them.

There is no doubt that for distributors, the potential exists to increase sales of online viewing that respond to consumer demands for convenience and timely access.

While there is some appetite for transactional purchases, it is primarily at the modest price points typically offered on online viewing platforms.

The paid online platforms most often cited by documentary audiences are Netflix, iTunes and Vimeo on Demand. Half of those surveyed are watching documentaries on Netflix. The popularity of the service increases with younger audiences.

4. More Documentaries on SVOD and Transactional Platforms Online

There is unmet demand from the participants in this study for more documentaries through SVOD services.

Respondents to the national online survey and focus groups participants are interested in viewing documentaries on paid subscription VOD services and express the desire to have more documentaries on these services. They like the ease and cost of Netflix and are willing to pay for the convenience of SVOD services that provide them with more choices. A majority are interested in watching Canadian documentaries but cannot find them with any ease, suggesting an opportunity for providers to supply more Canadian documentaries and to market them as Canadian.

5. Tools for Discoverability

By many accounts, creating a promotional buzz around a documentary remains the most effective means of driving viewership.

Participants in this study make extensive use of trusted sources to discover the documentaries that they see. This extends to trusted reviewers in traditional media and online, as well as to trusted social media influencers, bloggers and other fans they connect with online. They value the recommendations made by reviewers, their friends and family, and trusted social media sources to help determine which documentaries they want to watch. For some, viewing the trailer is important, while for others, the recommendation of a trusted source is enough to decide to watch a documentary.

Reviews in a variety of media, from online to radio to television, combined with readily available trailers can lead to increased viewership, particularly where marketing campaigns are shared through social media. Participants in this study search out favourable reviews from multiple sources and continue to rely on these to drive their transactional viewing decisions. Print, radio and television movie reviewers, and trusted brands such as Roger Ebert, iTunes and Rotten Tomatoes, continue to be reference points for audiences interested in discovering new documentaries.

Participants in the focus groups are interested in greater marketing and would welcome more information on titles of interest to them. They appreciate suggestions from trusted sources such as Netflix, iTunes and YouTube.

In addition, ensuring that a film has a strong Facebook and Twitter presence is important, particularly to facilitate sharing on the film.

6. Summary

The findings of this study provide evidence of the important value attached to the documentary genre as well as the opportunities to expand the offer of this type of programming via traditional means and on digital platforms. Perhaps more than any other genre of programming, documentary's ability to "illuminate a person, an event or an issue in powerful ways" provides immense opportunities to reach, connect and engage with new audiences.¹² It's clear that the challenge of today's crowded and cluttered media communications environment call for targeted marketing and discovery tools to make it possible to find and navigate the content Canadians want. The findings of this study are very much in line with this reality.

From a distribution perspective, the new environment also calls for release strategies that can make documentaries available to audiences in a timely manner, on multiple platforms and that offer promotional tools. Alternately, ensuring a wide release through online platforms and supporting discoverability with tools for online sharing and aggressive online marketing may reach new audiences. Finally, theatrical viewing of documentaries is important and consideration should be given to creating opportunities for bringing people together to engage with and share their thoughts on their viewing experiences.

12 Steve Ujlaki, "Why Documentaries Matter," September 15, 2010.

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ANNEX 1: PROFILE OF RESPONDENTS TO NATIONAL SURVEY

National On-Line Survey

A profile of survey respondents shows that respondents were primarily female (71 per cent) and anglophone (94 per cent). The majority of responses were collected from Ontario (59 per cent) and British Columbia (24 per cent), followed by Alberta (eight per cent) and Quebec (five per cent). Respondents between the ages of 35 and 54 make up the largest proportion of respondents, with 18-24 year olds representing 26 per cent of respondents overall. Seventy-eight per cent of respondents have a university education.

Proportion of Survey Respondents by Age

18-34	26%
35-54	39%
55-69	28%
70 and over	7%

Proportion of Survey Respondents by Level of Education

High school	3%
College	13%
Vocational/trade/technical training	5%
Undergraduate studies at university	40%
Graduate studies at university	38%

Proportion of Survey Respondents by Gender

Female	71%
Male	29%

Proportion of Survey Respondents by Primary Language

Anglophone	94%
Francophone	6%

Proportion of Survey Respondents by Province or Territory

	Survey Respondents	Total Canadian Population
QUEBEC	5.4%	23.2%
NEW BRUNSWICK	0.1%	2.2%
BRITISH COLUMBIA	24.1%	13.0%
NEWFOUNDLAND AND LABRADOR	0.1%	1.5%
NOVA SCOTIA	2.8%	2.7%
PRINCE EDWARD ISLAND	0.1%	0.4%
ONTARIO	58.6%	38.5%
MANITOBA	0.6%	3.6%
SASKATCHEWAN	0.3%	3.2%
ALBERTA	7.5%	11.5%
YUKON	0.1%	0.1%
NORTHWEST TERRITORIES	0.0%	0.1%
NUNAVUT	0.0%	0.1%

ANNEX 2: MARKET AVAILABILITY OF DOCUMENTARIES

1. Documentaries Are Available to Canadians on a Variety of Platforms

a) Documentaries on Television

Documentaries are available to Canadians on television with 90 per cent of all English-language documentaries and 88.7 per cent of all French-language documentaries produced in Canada destined for television.¹³

Canadians were spending 22.5 hours a week on average watching long-form documentaries on Canadian conventional stations (public and private) and Canadian discretionary services (specialty and pay, excluding PPV and VOD services) in 2011-2012.¹⁴ Examples of specialty channels that feature documentaries include Biography, Documentary Channel, Historia, History, Canal Savoie (French language), Planete (French language) Animal Planet, Discovery, National Geographic and Canal D (French language). Canada's national public broadcaster CBC and Radio Canada, and the educational provincial public broadcasters, Knowledge Network, TVO, TFO (French language) and Téléquébec also feature documentaries.

On average, Canadian documentaries are viewed on English-language specialty channels more than nine hours per week, and more than four hours per week on French-language channels, as compared to fewer than two hours viewed on conventional broadcast stations.¹⁵

By way of example, the following is a non-exhaustive list of Canadian broadcast channels that feature documentaries:

Category A (conventional) broadcast channels featuring documentaries include (but are not limited to):

- Biography
- Documentary Channel
- Historia
- History
- Knowledge Network
- TVO
- Canal Savoie (French language)
- Planete (French language)
- TFO (French language)

Category B (Pay and Specialty) Broadcast channels featuring documentaries include (but are not limited to):

- Animal Planet
- Discovery
- National Geographic
- Super Channel
- TMN
- Movie Central
- Canal D (French language)

13 *Profile 2013: Economic Report on the Screen-based Media Production Industry in Canada*, Canadian Media Producers Association, February 2014, page 43.

14 *Communications Monitoring Report*, CRTC, September 2013, page 81

15 IBID.

b) Theatrical and Festivals

Canadians can access documentaries at theatres (including repertory theatres and cinémathèques). In 2012-2013, only two per cent of all the documentaries produced were feature-length documentary films.¹⁶ However, when available, Canadian feature documentaries succeed in attracting modest audiences, with documentaries attracting several hundred thousand moviegoers.¹⁷

Canadians can also access documentaries at documentary film festivals. Hot Docs is North America's largest documentary festival, and welcomed 192,000 viewers to its 2014 edition.¹⁸ A recent study commissioned by Hot Docs shows that audiences for the festival are very diverse: of all ages and income brackets.¹⁹ For its part, the RIDM festival in Montreal increased its audience by 64 per cent in 2013, to over 63,500.²⁰ Documentary film festivals exist in other cities as well, such as Global Visions in Edmonton and the Belleville Downtown DocFest.

c) Digital Distribution Platforms

A growing array of digital platforms is available over the Internet or through broadcasting distribution undertakings (BDUs), on which Canadians are choosing to watch documentaries.

Numerous online documentary portals also offer opportunities to view documentaries on demand. Docstudio.tv.org, Hotdocslibrary.ca, Isuma.tv and NFB.ca are some examples of Canadian documentary platforms that provide curated selections of Canadian documentaries. Isuma.tv is an interesting example of a platform that allows other curators and producers to manage their own content channels, much like YouTube.

The NFB online screening room, NFB.ca, provides free streaming access to over 2,000 NFB productions, with the possibility to purchase downloads and DVD orders. In addition to general audiences, the site provides access to educators.²¹

A number of international portals also provide access to documentaries. Some sites merely aggregate the collections of other sites to which they point, such as Docoholic.com, which is a curated site of YouTube docs. Some, such as Topdocumentaryfilms.com, provide free access and a store where films may be purchased. Sites such as Documentaryaddict.com are supported by advertising and feature social media functionality. Other portals include Documentaryheaven.com, Documentarystream.com, Documentartytube.com, Documentarywire.com, Docuwat.ch, Filmforaction.org, iLovedocs.com and Nytimes.com/video/op-docs.

Canadian broadcasters use different channels to distribute documentaries digitally: subscription online video-on-demand services, online video portals and mobile applications. Despite the absence of Canadian content regulations for online video portals, the majority of documentary content on these video portals is from Canada because broadcasters acquire the streaming rights when they commission programs from documentary producers.

Documentary filmmakers seeking to connect with their audiences have access to an increasing number of online distribution channels, from broadcaster-controlled channels to transactional sites such as YouTube Movies, Vimeo On Demand, Doc Alliance and Syndicado, as well as ad-supported streaming sites, for example, SnagFilms. The recent proliferation of these VOD portals are in addition to more established platforms such as iTunes, Netflix, Hulu, the Sundance Channel and free sites such as NFB.ca. (It is estimated that ten per cent of Netflix' documentary catalogue is composed of Canadian documentaries.)²²

16 *Profile 2013*, Op. Cit., page 43.

17 *Getting Real: An Economic Profile of the Canadian Documentary Production Industry, Volume 5*, Documentary Organization of Canada, June 2013, page 103.

18 "Hot Docs 2014 Festival Sees Audiences of 192,000," Hot Docs website, May 2014, <http://www.hotdocs.ca>.

19 *Economic Impact Assessment Study of Activities Associated with Hot Docs 2013*, Hot Docs, July 2013, pages 16-17.

20 Press release, "Année record pour les RIDM L'affluence du festival dépasse les 63 500 visiteurs!," RIDM website, December 2013, <http://www.ridm.qc.ca>.

21 Intervention, Documentary Organization of Canada, Broadcasting Notice of Consultation CRTC 2014-190, June 27, 2014, page 12.

22 *IBID*.

As the dominant service for digital downloads and rentals in Canada, the performance of documentaries on iTunes provides a good indication of how they perform in that part of the market. Despite a tiny library on iTunes, Canadian feature-length and television documentary series are purchased frequently. Over half of the feature-film documentary catalogue appears in the top-200 rankings each week, and there is almost always one Canadian documentary series in the top-200 television series rankings.²³

Trends show that audiences are expanding their use of digital devices (i.e., portable computers, smart phones, tablet devices) to find, access and enjoy audio-visual productions available over the Internet. Mobile devices (tablets and phones) and computers currently account for 18 per cent and 15 per cent, respectively, of the viewing screens used by Canadian movie viewers, and this phenomenon is expected to increase over time.²⁴ Similarly, the use of cell phones and tablet devices for watching television programming is increasing, with penetrations rates for cell phones recently reported as 12 per cent, and 13 per cent for tablets.²⁵ A number of documentary apps for mobile devices are currently available to Canadian documentary audiences, including the NFB mobile app for viewing NFB films, World Documentary app, Documentary app and Watchdocumentary app (for Android). The NFB also produces a number of interactive content apps each year.

Online documentary platforms include:

- Cinemapolitica.org (Canada)
- Docstudio.tv.org (Canada)
- Hotdocslibrary.ca (Canada)
- Isuma.tv (Canada)
- Nfb.ca (Canada)
- Docoholic.com
- Documentaryaddict.com
- Documentaryheaven.com
- Documentarystream.com
- Documentartytube.com
- Documentarywire.com
- Docuwat.ch
- Filmforaction.org
- iLovedocs.com
- Topdocumentaryfilms.com
- Nytimes.com/video/op-docs

Mobile documentary applications include:

- NFB app
- World Documentary app
- Documentary app
- Watchdocumentary app (for android)
- Fandor
- Tubi
- Documentary Film

23 "Digital Distribution Report: The Performance of Documentaries on Digital Services in Canada," Documentary Organization of Canada, 2014, page 43.

24 *Study on the Movie-Watching Habits of Canadians* Op. Cit., page 6.

25 *Media Technology Monitor*, Spring 2014.

d) Documentaries in Community-Based Screenings

Canadians can access documentaries in their communities. The NFB plays a particularly important role in this market with NFB productions and content widely accessible, promoted and distributed to Canadian and international educational markets (teachers, schools, school boards, colleges, universities and ministries of education), as well as institutional markets (public libraries, social and health services, community and cultural associations and businesses).²⁶ A total of 12.6-million views were generated in 2012–2013 through the NFB's various education channels (DVD sales to schools, teacher workshops, education online subscriptions). Over 48,000 pedagogical materials were downloaded.²⁷ CAMPUS, the NFB's online streaming service for schools, had 4,160 registered online users and 6,849 customers in 2012–2013. Over 2.7-million Canadian K–12 students have access to this resource in their classrooms.²⁸

In addition to these markets, Canadians can access documentaries via film circuits. Founded in 1989, Film Circuit is TIFF's successful film outreach program, bringing the best of Canadian and international films to over 180 groups in over 160 communities across the country through an alternate model of grassroots distribution, marketing and exhibition.²⁹ Documentary filmmakers also work with grassroots organizations who share an interest in the social causes featured in their films. Grassroots organizations provide excellent opportunities to test-screen films, while their networks provide promotion and distribution opportunities for social cause documentaries.³⁰

26 NFB, Performance Report 2012-2013, page 34.

27 IBID.

28 NFB, Performance Report 2012-2013, page 39.

29 Toronto International Film Festival website, www.tiff.net.

30 See for example, Ezra Winton, *The Spaces Between: Grassroots Documentary Distribution and Exhibition as Counterpublics*, MA Thesis in the Department of Communication Studies, Concordia University, August 2007.