hotdocs

OUTSPOKEN.OUTSTANDING.

2018 DOCUMENTARY AUDIENCE RESEARCH

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Any opinions, findings, conclusions, or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Creates, Telefilm Canada, the National Film Board of Canada, the Government of Ontario, or the Government of Canada. The Governments of Ontario and Canada and their agencies are in no way bound by the recommendations contained in this document.

Hot Docs also thanks the following outreach partners for their assistance with the promotion of the national online survey: ArtsLink NB, Atlantic International Film Festival, Available Light Film Festival, Belleville Downtown DocFest, BC Alliance for Arts + Culture, Calgary International Film Festival, Creative BC, DOXA Documentary Film Festival, The Harvard Seal Documentary Film Club, imagineNATIVE Film Festival, Inside Out, Knowledge Network, Lunenburg Doc Fest, National Film Board of Canada, National Screen Institute, NorthwestFest, Nunavut Film Development Corporation, Reel Asian International Film Festival, Rencontres internationales du documentaire de Montréal, TVO, Vancouver International Film Festival, and Yorkton Film Festival.

Table of Contents

Introduction

PREAMBLE

Filmmakers make documentaries for audiences, plain and simple, but in such a rapidly changing marketplace, discovering and buying documentaries for audiences is not so plain *or* simple. In 2014, Hot Docs launched *Learning from Documentary Audiences: A Market Research Study* (referred to throughout this study as DAR 2014), which surveyed viewing habits across Canada, drawing from thousands of completed questionnaires and a five-city focus group tour. We wanted to understand the people who were in the market for documentaries, to get to the bottom of how they discovered, shared, rented, purchased, and ultimately watched documentaries. In other words, how had the audience's habits adjusted to market, industry, and cultural changes?

Via the 2014 study (available at https://www.hotdocs.ca/i/learning-from-documentary-audiences), Hot Docs discovered some illuminating insights from documentary audiences, who provided data-based evidence for many of our intuitive beliefs. We now had data to back up what we'd been positing. Documentary audiences, for example, were willing to pay for documentaries, if they could only find them. Contrary to broadcasters' views of the marketplace, audiences put value and worth in documentaries. Discovering docs was still a challenge for audiences and they relied on film reviews and word of mouth to show them the way, but it was clear that they were *eager* to watch documentaries. The only thing really holding them back was a difficulty in finding and accessing documentaries in the first place.

For filmmakers, the research affirmed the importance of marketing their films to audiences. It provided empirical proof of what we, as filmmakers and festival organizers, already knew: (a) audiences were hungry for *more* docs, and (b) they gave value and worth to documentaries, which should help encourage those who are funding them to work a little harder and invest even more.

In response, Hot Docs designed Doc Ignite, a workshop series focusing on documentary marketing and audience engagement. We created tools that would help filmmakers work with publicists, distributors and agents to help promote their films across exhibition platforms. Additionally, we presented strategies to support integrated distribution for successful film releases. Hot Docs held these workshops across Canada and around the world, educating filmmakers and offering hands-on practical tools to improve exhibition and exploitation of their work, directed by the audience research.

What came next?

Four years later, we found ourselves in a changing marketplace and digital landscape. We observed Netflix as an industry and culturally dominant force, scooping up films for large figures out of major festivals. Meanwhile, docs had become (even) cooler. The doc film industry had experienced a series of theatrical documentary blockbuster hits, and grew exponentially.[1]

Coupled with these commercial booms was a deepening movement to use documentaries to foster social impact. This movement aimed to mobilize audiences through non-fiction storytelling. Training, engagement, and funding opportunities for impact documentaries drove audience engagement campaigns that propelled the popularity of documentaries even more.[2]

We were curious to see how our audiences had adjusted to market, industry, and cultural changes. We wanted to know what changed in their relationship to documentaries. The result? This very report: *Hot Docs Documentary Audience Research 2018*. This latest piece of research necessarily builds on the prior research, but also adds a few new points of inquiry. This new document continues the story of documentary viewing in Canada and provides more insight into our understanding of the Canadian audience.

GOALS OF THE STUDY

This research, conducted by Leger on behalf of Hot Docs Canadian International Documentary Festival (Hot Docs), aimed to (a) understand the current viewing habits of the documentary audience in Canada, and (b) show how they have evolved from the last survey (i.e. DAR 2014).

METHOD

An online survey of 3,607 Canadians who watch documentaries was completed between June 12 and July 30, 2018. The survey was collected in both English and French. A portion of the sample was collected via an open link disseminated by Hot Docs (n=3,106), while another portion was collected using Leger's online panel (n=501). The margin of error for a study of this size is +/-1.6%, 19 times out of 20.

Where applicable, this year's data has been compared to Hot Docs' 2014 study, entitled *Learning from Documentary Audiences: A Market Research Study,* referred to in this study as DAR 2014. In that study, 3,271 Canadians were surveyed online between April and June of 2014, and the reported margin of error was +/-2.2%.

▲ Indicates a significant increase from 2014.

▼ Indicates a significant decrease from 2014.

APPROACH

To allow for the greatest participation, the survey was promoted through social media and through the following outreach partners: ArtsLink NB, Atlantic International Film Festival, Available Light Film Festival, Belleville Downtown DocFest, BC Alliance for Arts + Culture, Calgary International Film Festival, Creative BC, DOXA Documentary Film Festival, The Harvard Seal Documentary Film Club, imagineNATIVE Film Festival, Inside Out, Knowledge Network, Lunenburg Doc Fest, National Film Board of Canada, National Screen Institute, NorthwestFest, Nunavut Film Development Corporation, Reel Asian International Film Festival, Rencontres internationales du documentaire de Montréal, TVO, Vancouver International Film Festival, and Yorkton Film Festival.

LIMITATIONS

With the intention of reaching audiences who were already watching documentaries, this study was mainly limited to documentary audiences recruited via email or through the social media channels of Hot Docs (or one of its affiliate partners who agreed to participate in the online survey). For this reason, regional data is skewed towards the communities in which Hot Docs and/or its partner organizations are based, and may not represent the full scope of documentary viewiership across the country.

This year, a larger percentage of rural and Quebec respondents was realized, but the numbers are still low relative to national averages (i.e. only 4% identifying as rural, and 6% from Quebec), so any regional differences still need to be interpreted with caution.

As well, some of the affiliate partners enlisted to help broadcast the survey access link were not related to documentary film festivals. This may have an effect on the results this year. As an example, this year's results show a decrease in viewers who attend a film festival. This result could be due to having more respondents *outside* of the festival community (but who are still documentary viewers) being invited to complete the survey. Likewise, we show fewer viewers attending films in theatres than in 2014, despite the Hot Docs Ted Rogers Cinema reporting strong increases in viewership. This change, then, is likely due to the survey having more respondents from outside of Toronto this year.

As a result, a direct comparison of the 2014 and 2018 demographic profiles (as it relates to the documentary viewer) is not possible due to the expansion of the survey base. That being said, several trends still persist in that women, urban dwellers, Ontario residents, higher-income, and higher-education individuals still define the respondent sample.

Finally, the survey asked people questions pertaining to the "past three years." (For example, "Compared to three years ago, do you watch more documentaries?") This style of question was meant to be consistent with the 2014 wording of the questions, where questions also addressed the "past three years." These questions were therefore <u>not</u> meant to fill the four-year gap between the two surveys and measure change specific to that time period.

STRUCTURE OF THE REPORT

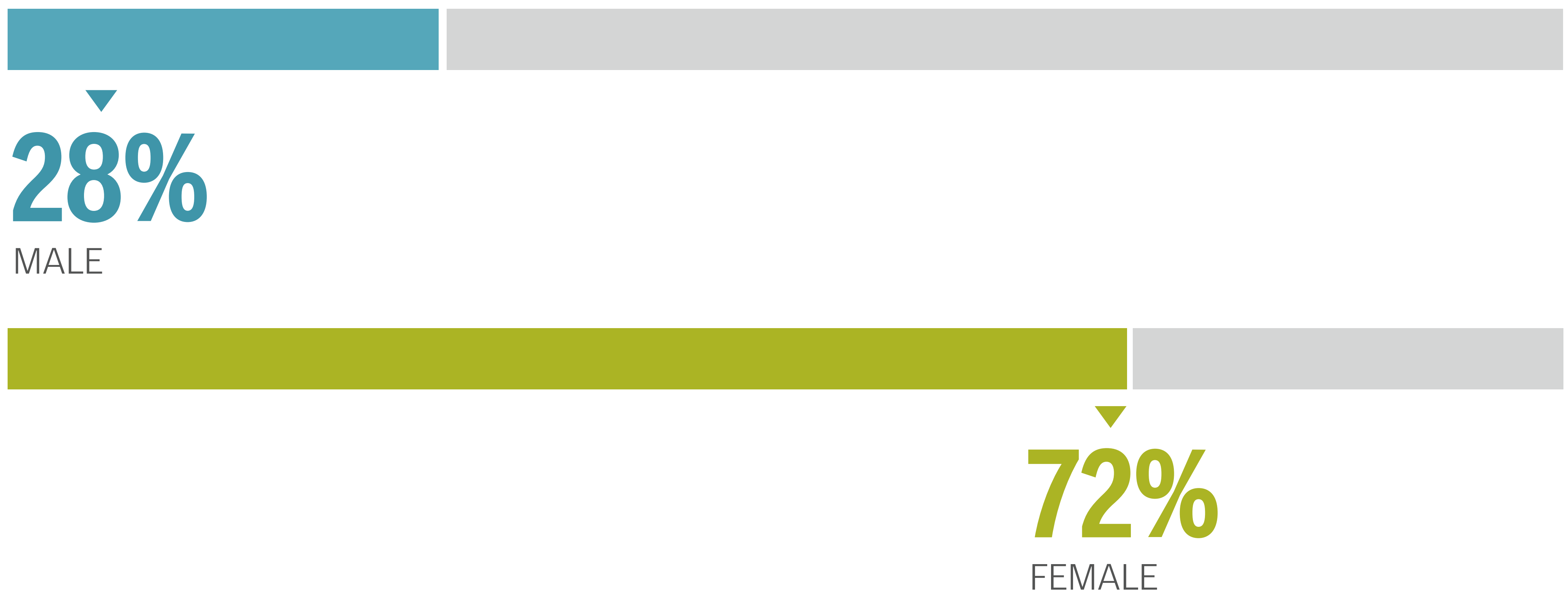
The main body of this report is divided into four sections:

1. *Viewership*, which describes who is viewing, what they are viewing, and how often. It also includes an analysis of platforms and devices used to view documentaries.
2. *Discovering Documentaries*, which discusses how viewers access and learn about new documentaries.
3. *Paying for Documentaries*, which presents when and how much viewers will pay for content.
4. *Social Media*, which describes how viewers use social media and interact with others when it comes to documentary viewing.

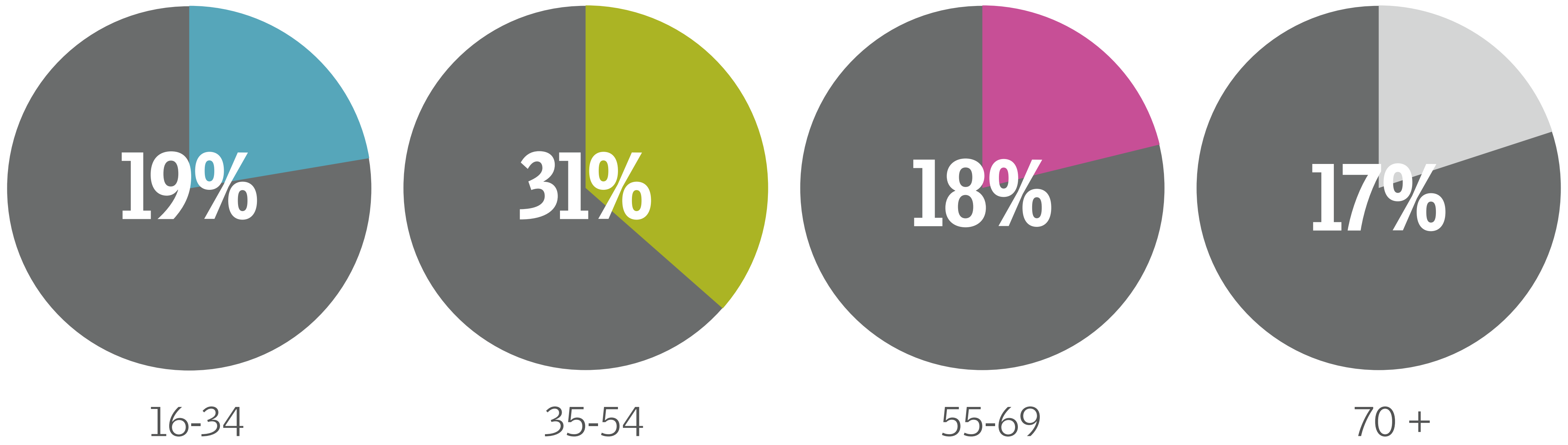
Respondent Profile

Please take note that **far more people who identified as women answered the survey than people who identified as men**. Also, the vast majority of respondents hail from Ontario and live in an urban area. (Similarly, in 2014, respondents were concentrated in two provinces: Ontario and B.C., and only 2% had a rural postal code.)

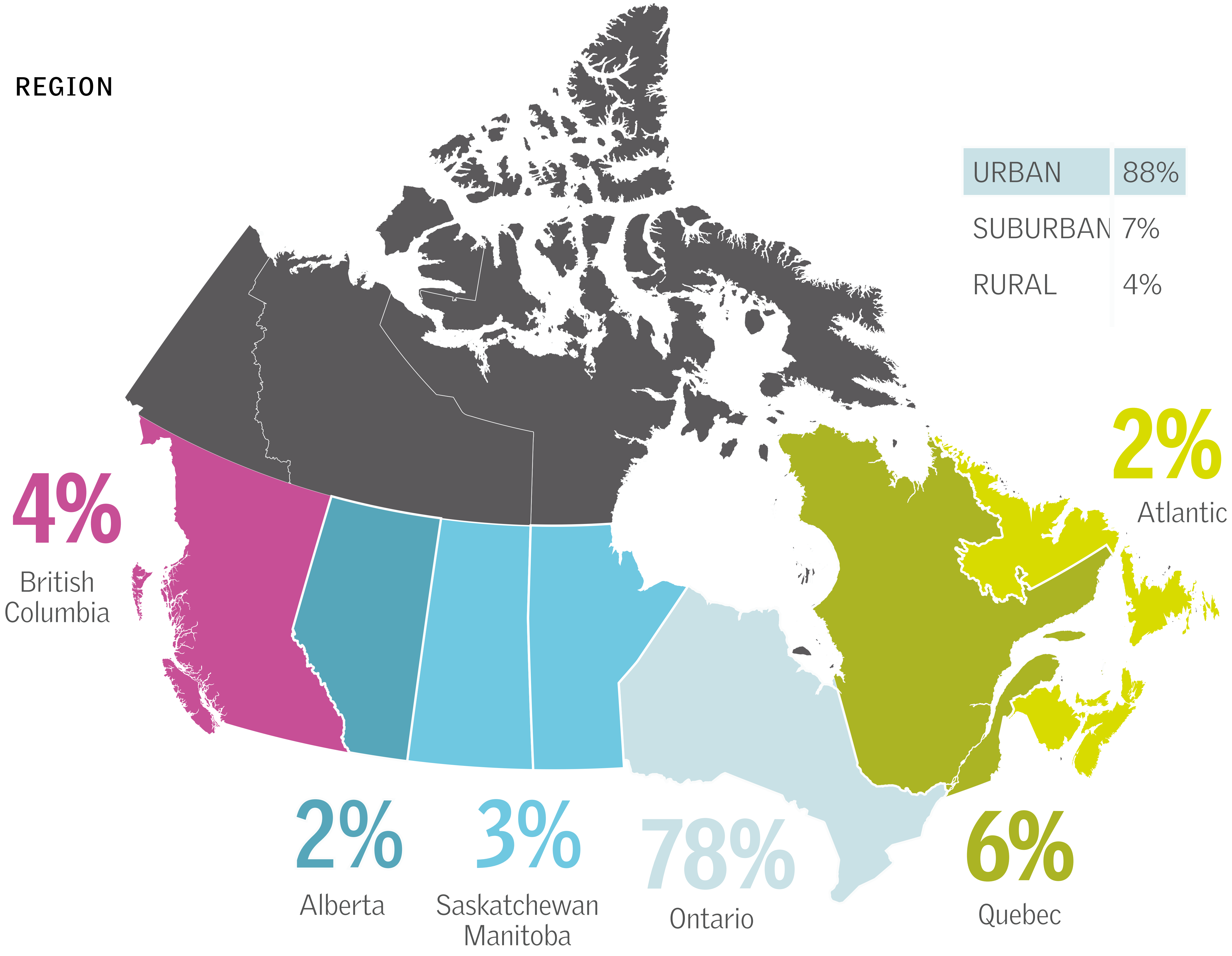
GENDER



AGE



REGION



URBAN	88%
SUBURBAN	7%
RURAL	4%

Most respondents are highly educated individuals and report an above average household income relative to the average Canadian household.

Base: Documentary watchers (n=3586).

HOUSEHOLD INCOME

- 12% <$40K
- 21% $40K–<$75K
- 14% $75K–<$100K
- 28% $100K+
- 25% REFUSAL

HAVE CHILDREN LIVING AT HOME

- 17% YES
- 83% NO

EDUCATION

- 76% UNIVERSITY
- 18% SOME COLLEGE/COLLEGE
- 6% HIGH SCHOOL OR LESS

Base: Documentary watchers (n=3586).

IDENTIFY AS A MEMBER OF AN ETHNO-CULTURAL CULTURAL COMMUNITY

19%	YES	
	Jewish	*4%*
	Chinese	*2%*
	Asian/South Asian	*2%*
	White/Anglo-Saxon	*1%*
	Canadian	*1%*
	Black/African American	*1%*
	Latin	*1%*
	Indigenous	*1%*
65%	NO	
17%	NO ANSWER	

LANGUAGE SPOKEN AT HOME

93%	ENGLISH	
6%	OTHER	
	French	*1%*
	Spanish	*1%*
	Cantonese	*1%*
	Other	*2%*
1%	NO ANSWER	

Key Findings

1. VIEWERSHIP

Documentary viewership remains strong. Interestingly, the way viewers are consuming the content is changing. Movie theatres and film festivals, for example, are losing ground to the myriad ways one can easily – and relatively cheaply – stream an ever-growing amount of documentary content from the comfort of one's home.

- Seventy-two percent of doc audiences watch documentaries at least twice a month, while the remainder does so less often (i.e. a few times a year or less frequently).
- Fifty-five percent are watching *more* documentaries than three years ago. Not only are there more documentaries out there that interest them, say respondents, they also perceive there to be simply more documentaries on offer. (This is one of the key items that viewers asked for in 2014.)
- If (a) more information existed about documentaries that might interest them, if (b) they could easily find specific documentaries when they wanted to watch them, and if (c) more documentaries were available (not only at their local theatres, but also when they sit down to watch television), respondents say they would watch even *more* documentaries.
- Along with this increase in desire for documentary content, the research found that many respondents also need a better way to learn about, and keep track of, exactly *which* documentaries are playing, and *where* (be it on TV or in theatres).
- Viewings are largely taking place at home (94%) and/or at the movie theatre (79%).
- Television via cable/satellite packages are still popular, and rank as one of the most common devices used to watch a documentary (along with a desktop or laptop computer). In terms of platforms used, though, Netflix, at 72%, tops the list of sources (when not at the cinema), followed by YouTube (54%), and then cable or satellite packages (37%). (The percentage watching documentaries on Netflix increased a great deal from 51% in 2014.)
- The use of a movie theatre as a source of documentary content is no longer as significant as it once was. Other ways to watch documentary content that are simply easier – and cheaper – are growing in prominence.

2. DISCOVERING DOCUMENTARIES

It's easier to find documentary content than it was just a few years ago. Yes, it likely has something to do with the fact that the profile and marketing of documentary films has increased, but it's also likely because the content is easier to access via streaming services such as Netflix and cable and/or satellite TV packages. Interestingly, a documentary's presence on Netflix carries the same weight as word of mouth and theatre websites/listings, when respondents are deciding what documentary to watch. Above all, though, audiences watch documentaries online or download them from the Internet because the content is immediately available exactly when and where they want to watch it. Instant availability trumps factors like cost and portability.

- Compared to three years ago, respondents are finding more documentaries than they used to. This is likely related to the increased perception, profile, and marketing of documentary films in the last few years. (Fifty-six percent of the respondents surveyed certainly think so.)
- There are many ways to find out about documentaries, say respondents, but the key influences are articles and/or reviews (be they online, in print, on the radio, or on TV) and recommendations from family and friends. Movie trailers rank third, but it doesn't mean they aren't important: 76% indicate they're an important tool in deciding what film
to watch, and they continue to be ranked as one of the top five influencers in the decision-making process. Overall, it can be inferred that some combination of all of these factors help audiences decide which docs to watch.
- When they sit down to watch a documentary, 54% simply browse what's available and make a decision based on what's most interesting to them, while 46% already have something in mind.
- As for Canadian documentaries? Discoverability is still an issue. While the vast majority agrees it's important that Canadians have access to Canadian documentaries and are hopeful that they'll be able to access more of them in the future, less than half (47%) can easily find a Canadian documentary to watch. The good news is, progress is already being made on this front: about half (49%) believe it has become easier to find Canadian documentaries, compared to just three years ago. In addition, more respondents than ever believe they can easily find and watch Canadian documentaries (10% vs. 7% four years ago).

3. PAYING FOR DOCUMENTARIES

In the past year, 87% have paid for documentary content in one or more of the following ways: by purchasing a theatre or festival ticket, an online subscription service (like Netflix), via their cable or satellite package, and/or by purchasing or renting a documentary. But given what's available online, and for free, will they continue to do so?

- While 87% have paid for documentary content, 13% have not.
- Just over half (55%) pay for documentaries they watch online while nearly as many (45%) do not. Among those who do, payment is usually made for one of three reasons: (1) as a show of support, (2) for the convenience of having instant access, and/or (3) for access to a safe, reliable, and legal streamed version of the documentary in question.
- Sixty-eight percent watch or download documentaries online for free, while 32% do not. The reason? The simple fact that such documentaries exist – sometimes exclusively – in this format, say respondents, so why not take advantage of it?
- Audiences value documentaries with a dollar amount significant and competitive to other content in the marketplace. Rentals, online subscriptions, and on-demand viewing all fall below the $11 mark, but there is a greater willingness to pay more to own a documentary than to simply rent or view it.

4. SOCIAL MEDIA

Facebook ranks as a viable promotional and discussion vehicle for documentaries – especially with the younger crowd since DAR 2014.

- Fifty-three percent of Facebook users have posted, liked, or shared information about a documentary.
- After seeing friends sharing a newly released documentary on Facebook or Twitter, seven-in-ten Facebook and Twitter users will (a) search for more information about the documentary online, (b) watch the trailer online, and (c) make plans to watch the documentary.
- This increase in involvement after reading a tweet or a Facebook post has also seen substantial changes since the 2014 research. After seeing friends sharing a newly released documentary on their Facebook or Twitter accounts, respondents are now more likely to search for more information about a documentary online, watch a trailer online, look for other reviews/feedback/comments/tweets, and/or start a discussion with their network.
- Ninety-three percent have discussed a documentary they've watched in some capacity, with 81% having discussed it with friends, family, and/or colleagues, and 62% saying they've searched online to learn more about the topic.

Viewership Frequency

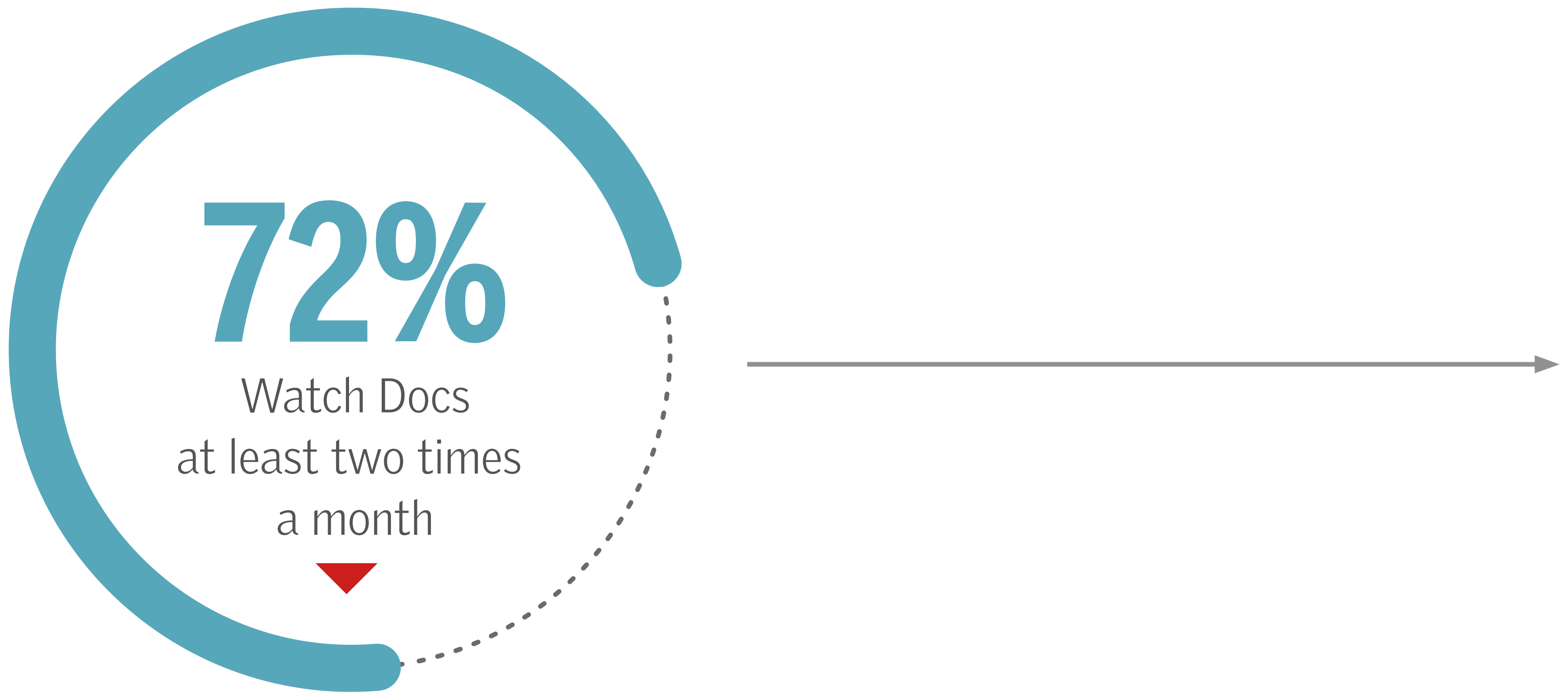
72% watch documentaries at least twice a month, be it in a theatre, on television, online, or on a DVD or Blu-Ray disc. Those 55+ (relative to Millennials), and Ontarians (relative to those in the West and in Quebec) are more likely to be in this segment. **Notably, 35% of all respondents watch over three docs a month, while 37% do so twice per month**. The remainder partakes less often.

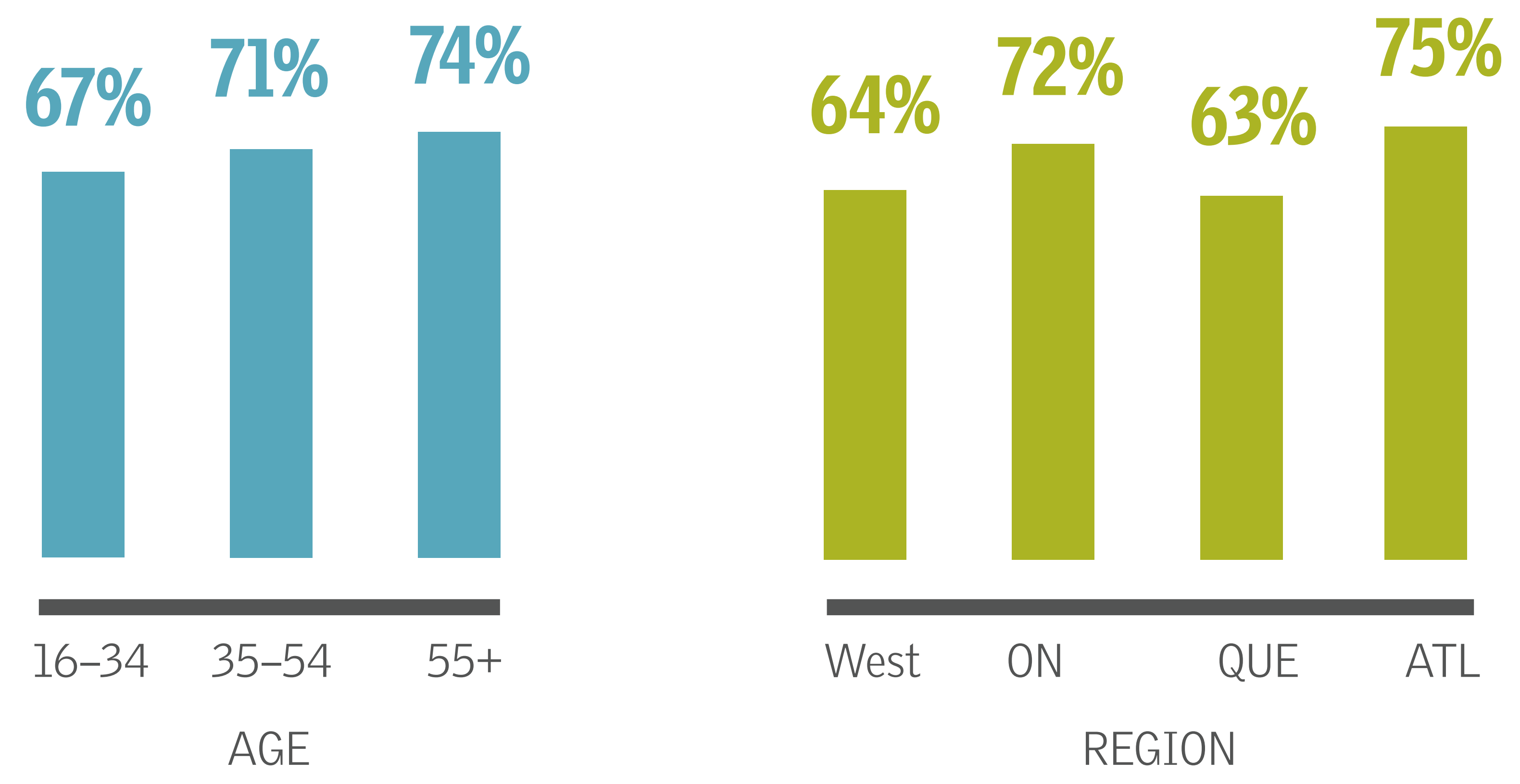
Relative to DAR 2014, frequent viewing (i.e. twice per month or more) has decreased nominally (72% in 2018 vs. 76% in 2014).

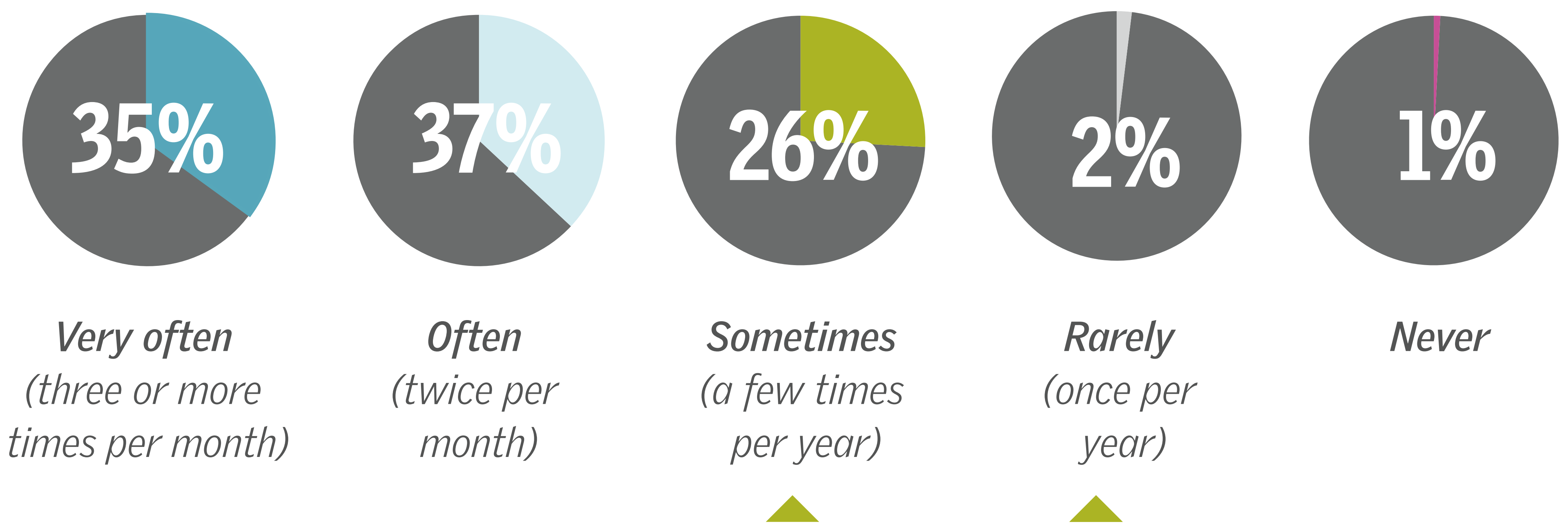
Higher-educated respondents (college degree or higher), as well as those living alone, are more likely to be watching documentaries at least twice a month.

Q1. VIEWING FREQUENCY

(All respondents: n=3607)





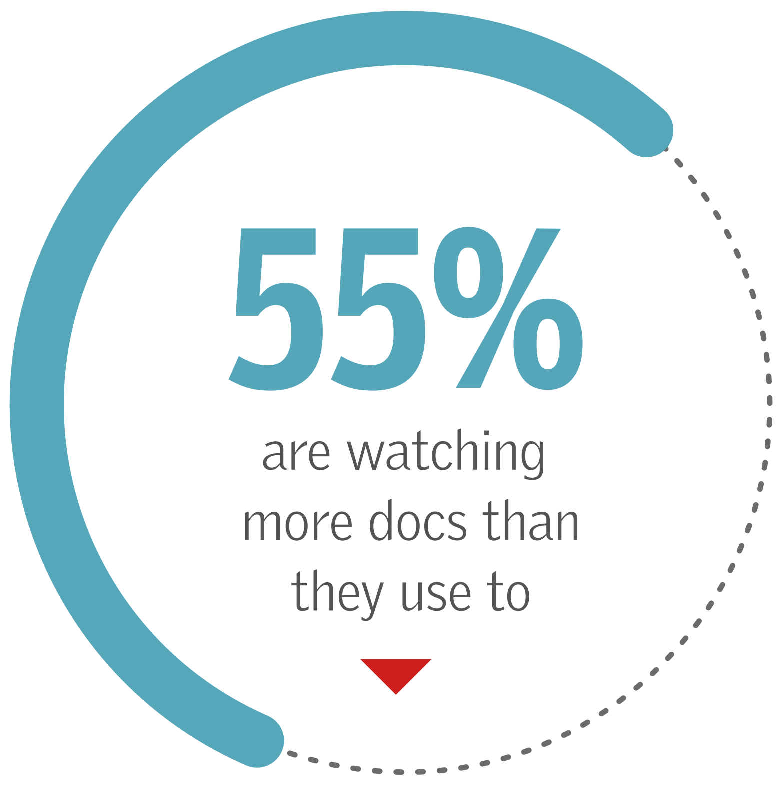


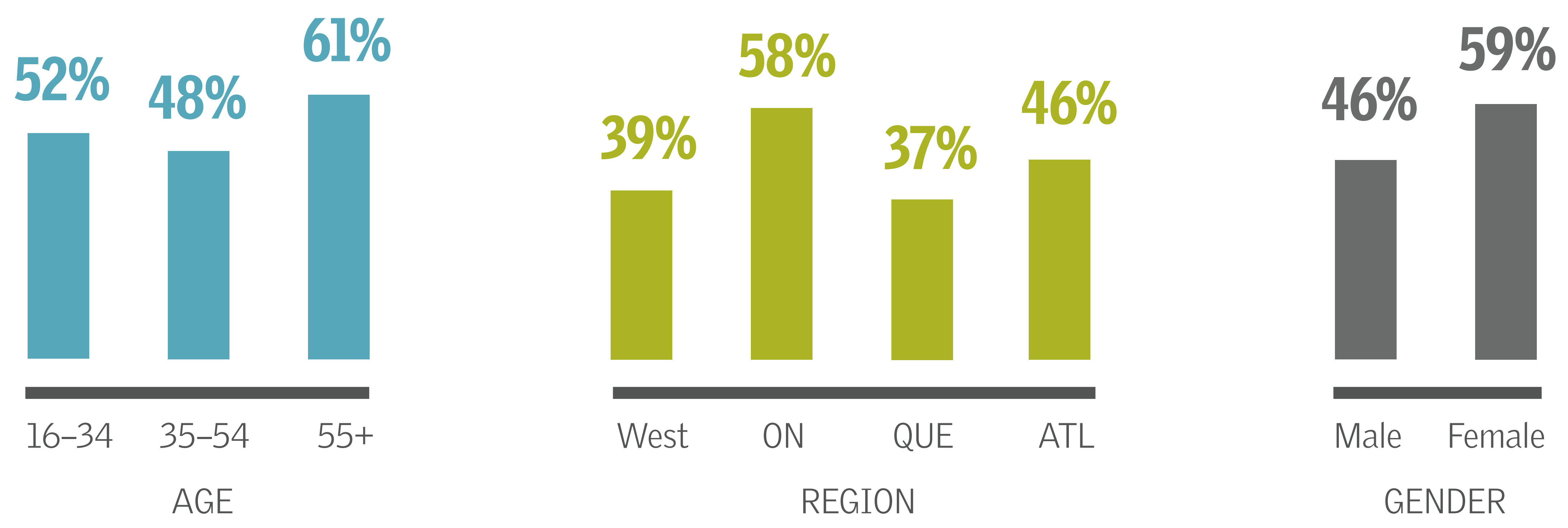
55% ARE WATCHING MORE DOCS THAN THEY USED TO.

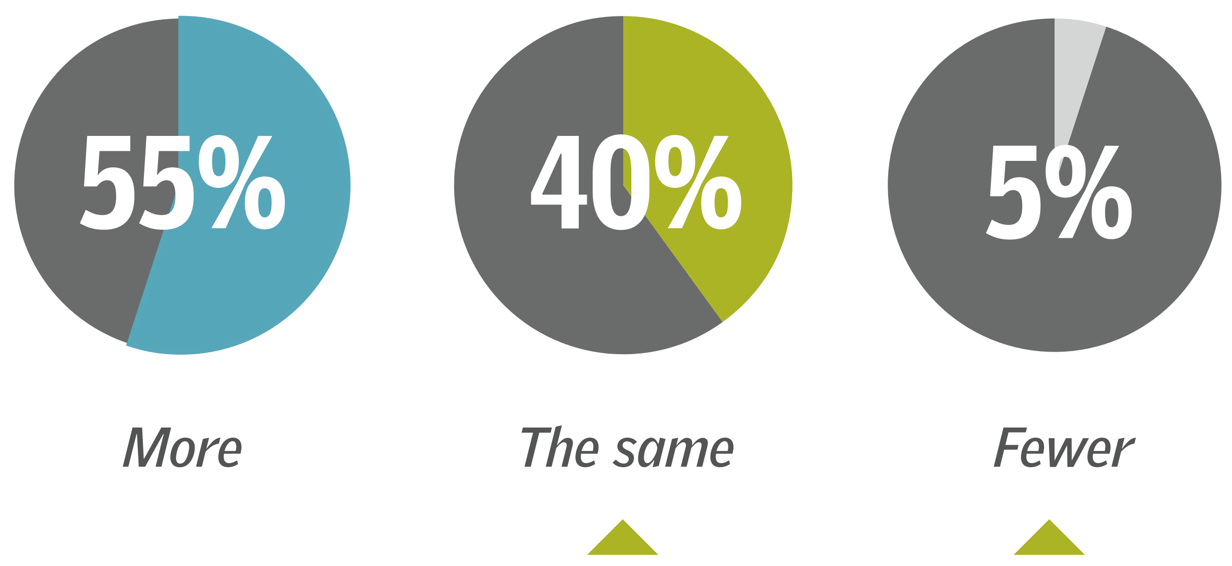
Over half are watching more documentaries than they did three years ago, particularly those 55+, Ontarians (vs. those in the West and in Quebec), and women. **Respondents perceive there are more documentaries out there that interest them and they also feel that there is an increase in easy access** to documentaries on TV and online. Compared to 2014, in 2018 fewer respondents have indicated that they're watching *more* documentaries (55% in 2018 vs. 62% in 2014). So while we are still seeing a substantial increase in viewership, the rate of increase has slowed slightly over the past four years.

Q25. VIEWING FREQUENCY vs. THREE YEARS AGO

(Documentary watchers: n=3586)



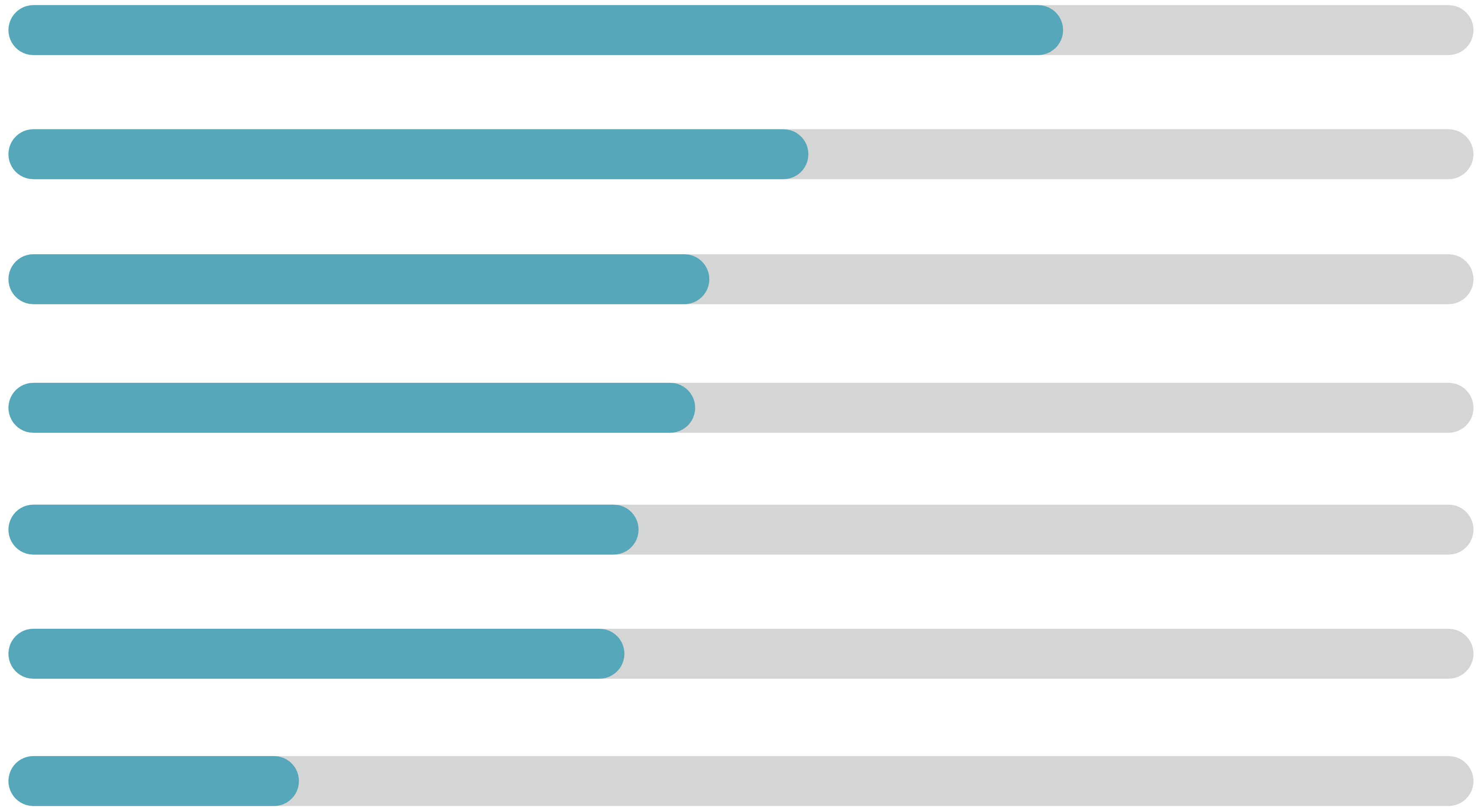




55% ARE WATCHING MORE DOCS THAN THEY USED TO.

Q26. THE TOP REASONS WHY

(Those watching more documentaries than three years ago: n=1980)



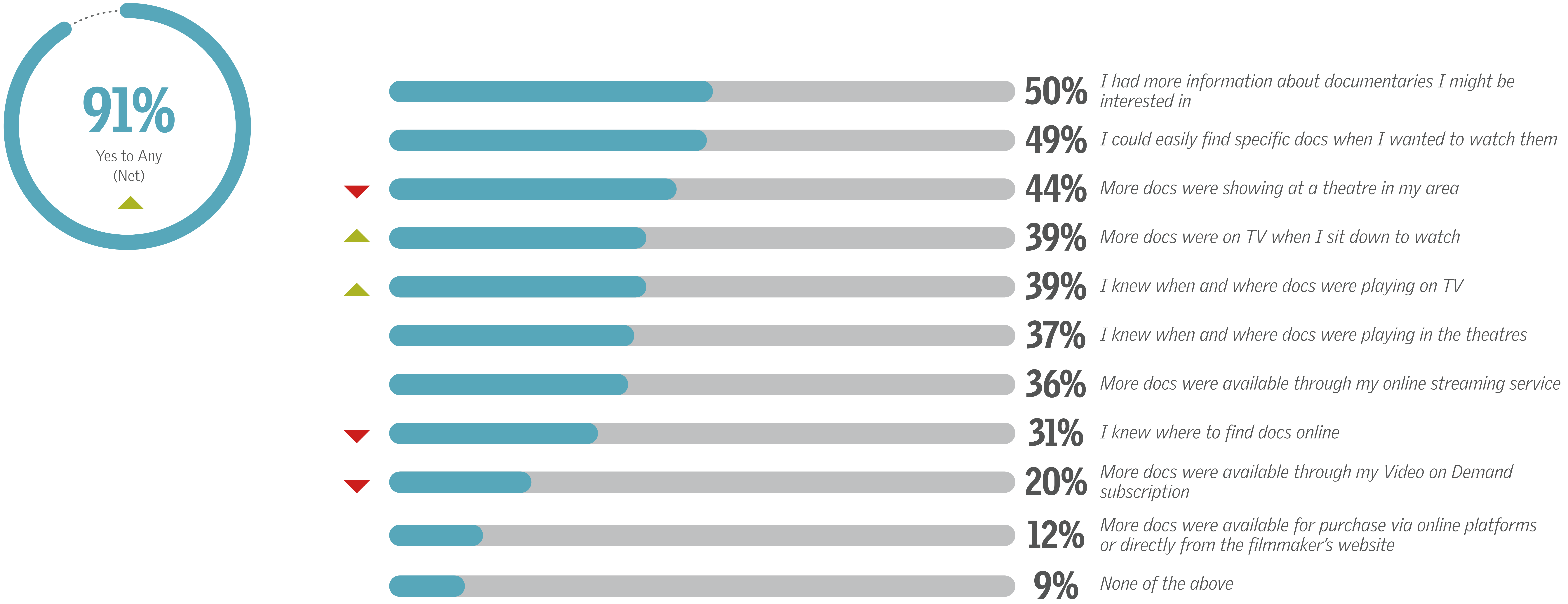
- **71%** *There seem to be more docs about things I'm interested in*
- **53%** *There are more available in the cinemas in your area*
- **46%** *They are more available/easier to access on TV*
- **45%** *You are more aware of when/where they're available on any platform*
- **41%** *There are more available online*
- **40%** *You can watch them online*
- **17%** *You can download them on the internet*

Any other reasons were mentioned by <5% of the respondents.

AUDIENCES WOULD WATCH MORE DOCS IF...

Compared to DAR 2014, 91% of audiences would watch more documentaries if basic access and availability conditions were met **(91% vs. 85% four years ago)**. What we are seeing is that their capacity is not being met and they have a greater appetite. **The industry could better harness traditional marketing channels such as film and TV listings as well as making more docs available on more platforms. The more exposure these viewers have to new documentaries, the more likely they are to watch them.**

Q29. "I'D WATCH MORE DOCUMENTARIES IF . . . "



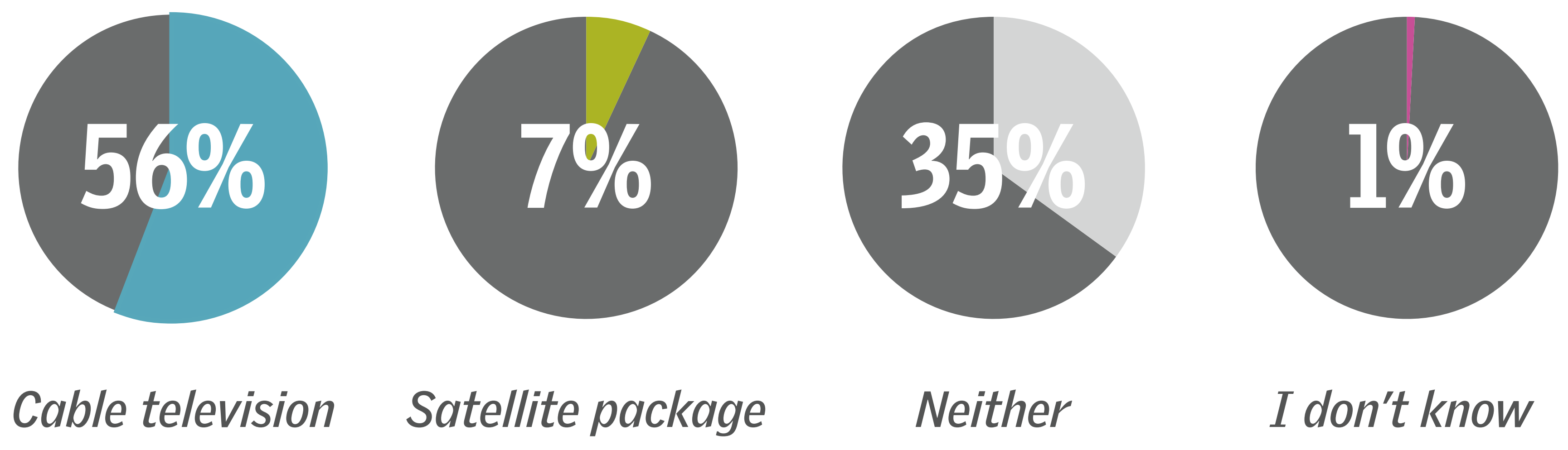
Viewership Sources

AUDIENCES ARE STILL WATCHING TV.

Most respondents have a cable or satellite TV package (which tends to increase in likelihood along with age), **and these packages rank as one of the most popular ways to watch a documentary. The TV as a device is preferred by doc audiences along with a desktop or laptop computer.**

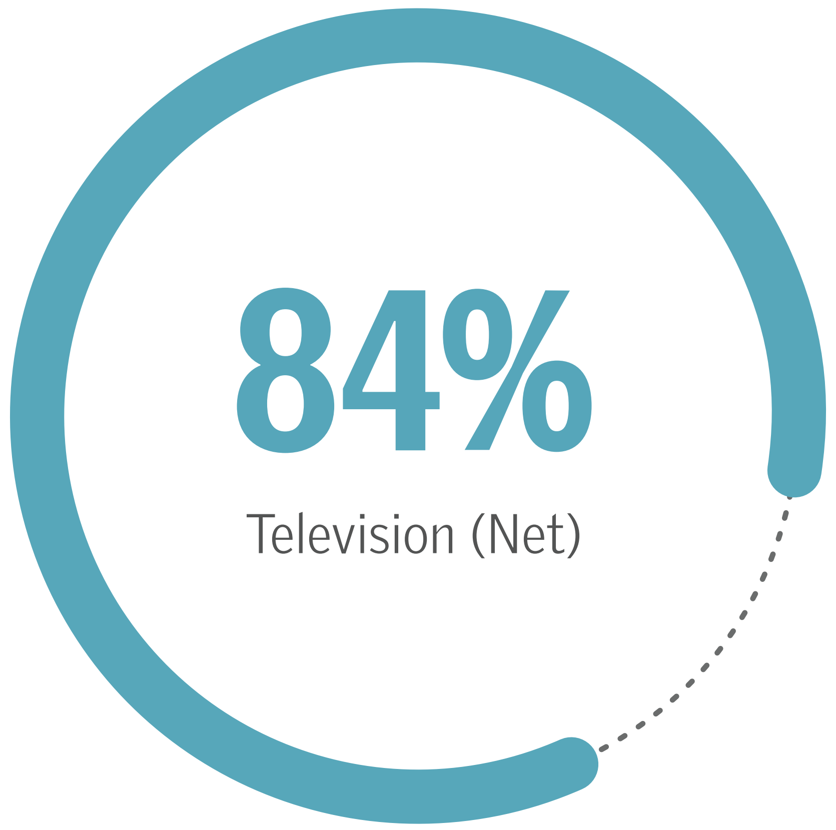
Q5. CABLE TV OR A SATELLITE PACKAGE?

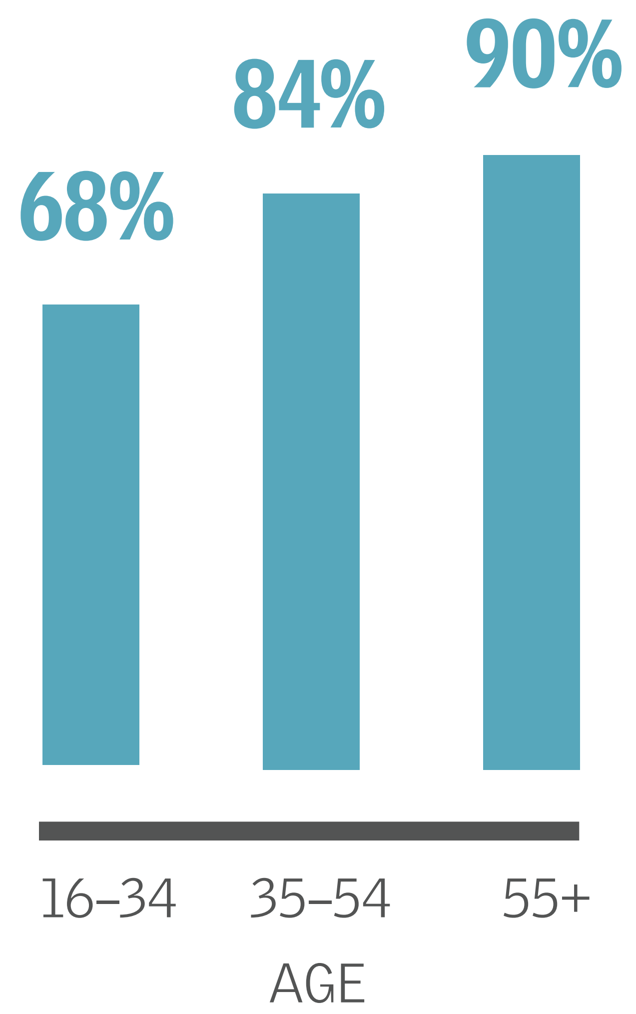
(Documentary watchers n=3586)

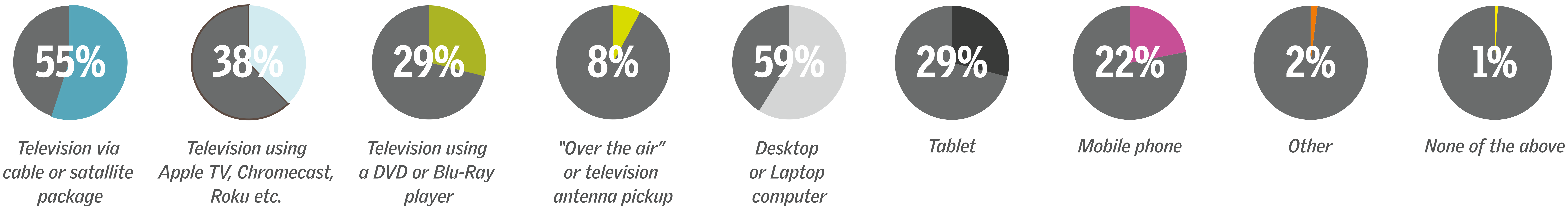


Q7. DEVICES USED TO WATCH DOCUMENTARIES

(Documentary watchers n=3586)





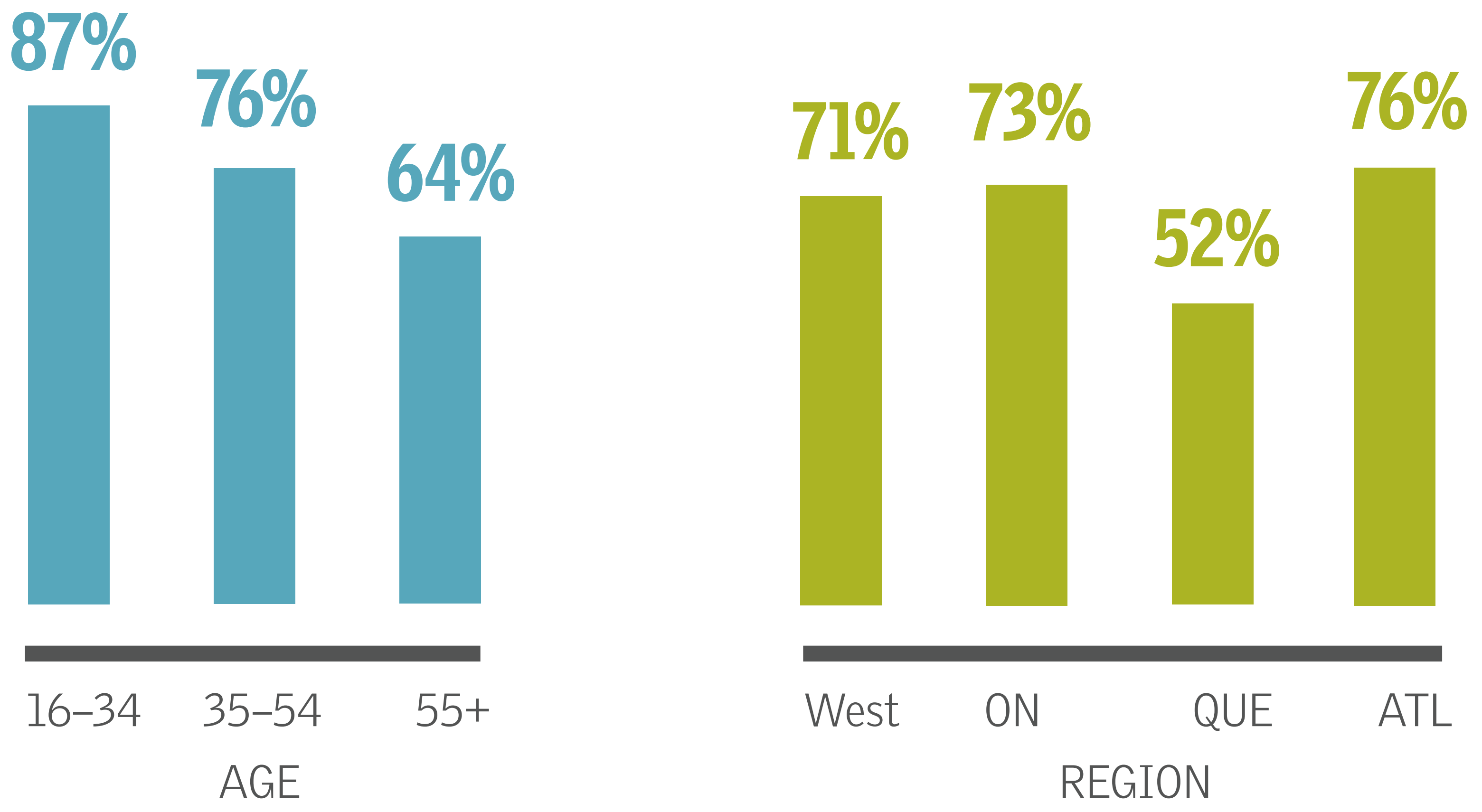


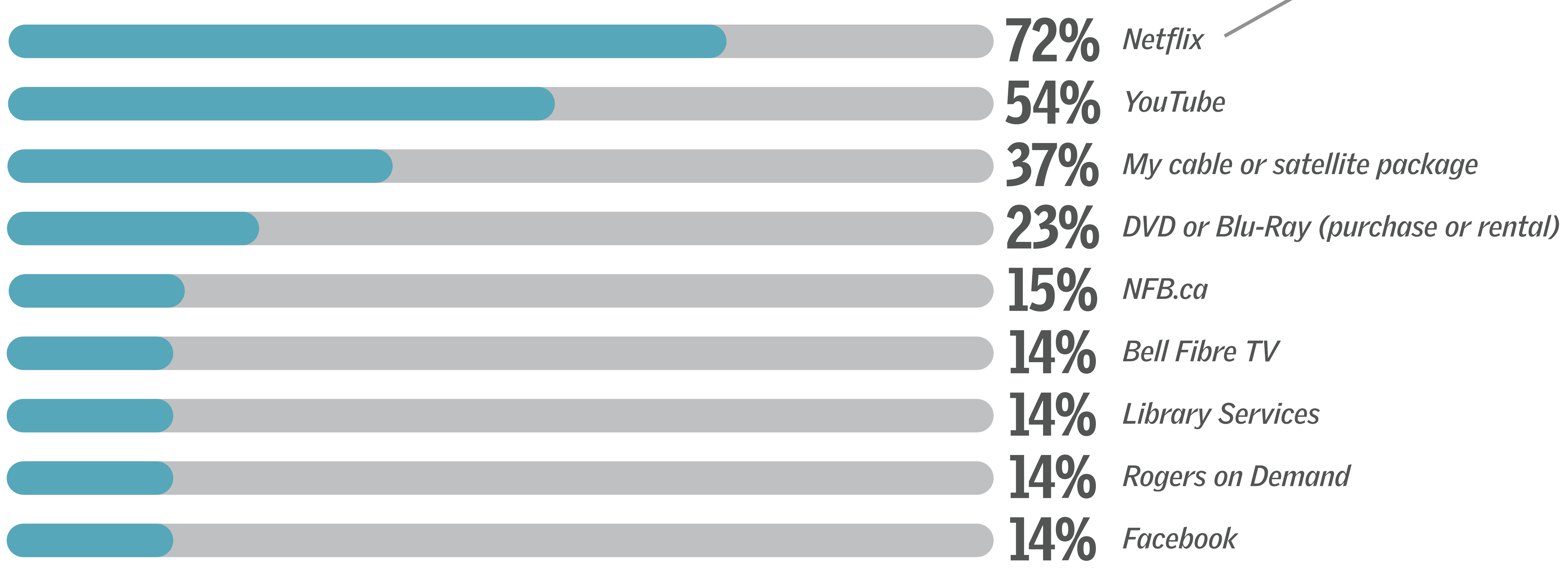
NETFLIX DOMINATES

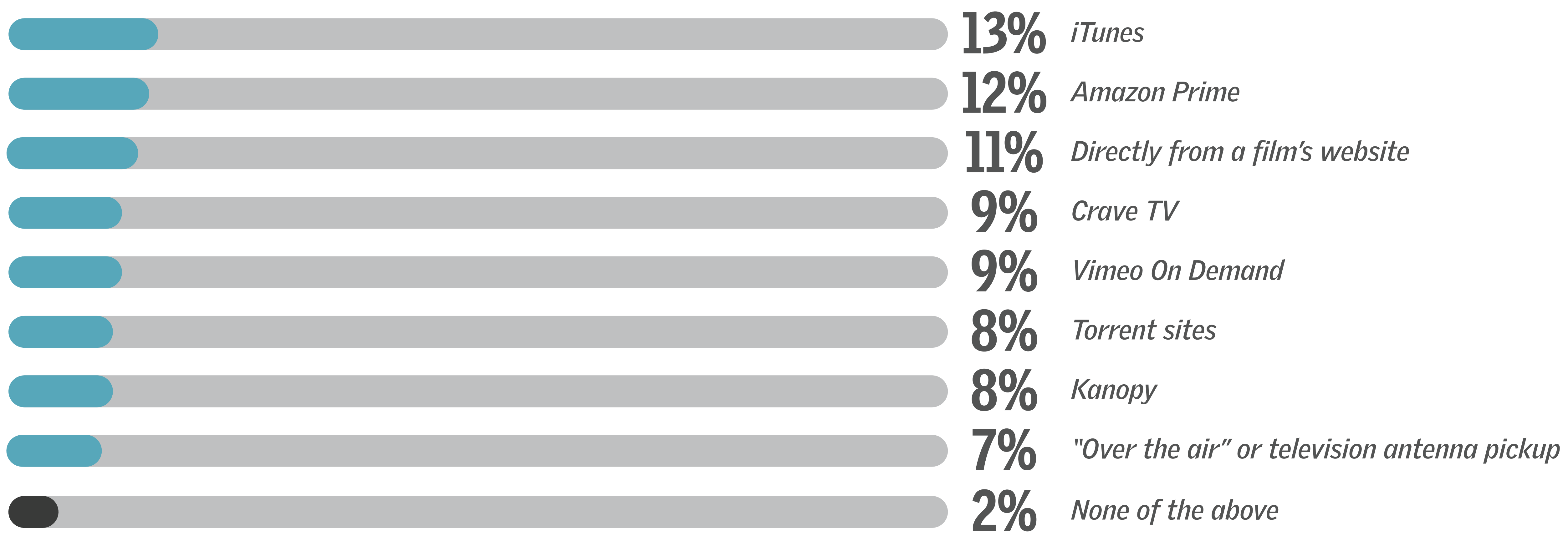
Perhaps one of the main reasons why desktop and laptop computers rank just as high as cable or satellite television (see previous slide) is because, **when not at the cinema, Netflix and, to a lesser extent, YouTube, dominate as the two main sources for documentaries – two platforms that can be easily streamed via a desktop, a laptop, or a smart TV.** (Demographically, however, use of Netflix is lowest in Quebec, and steadily decreases with age.)

Q6. PLATFORMS USED TO WATCH DOCUMENTARIES WHEN NOT AT THE CINEMA

(Documentary watchers n=3586)

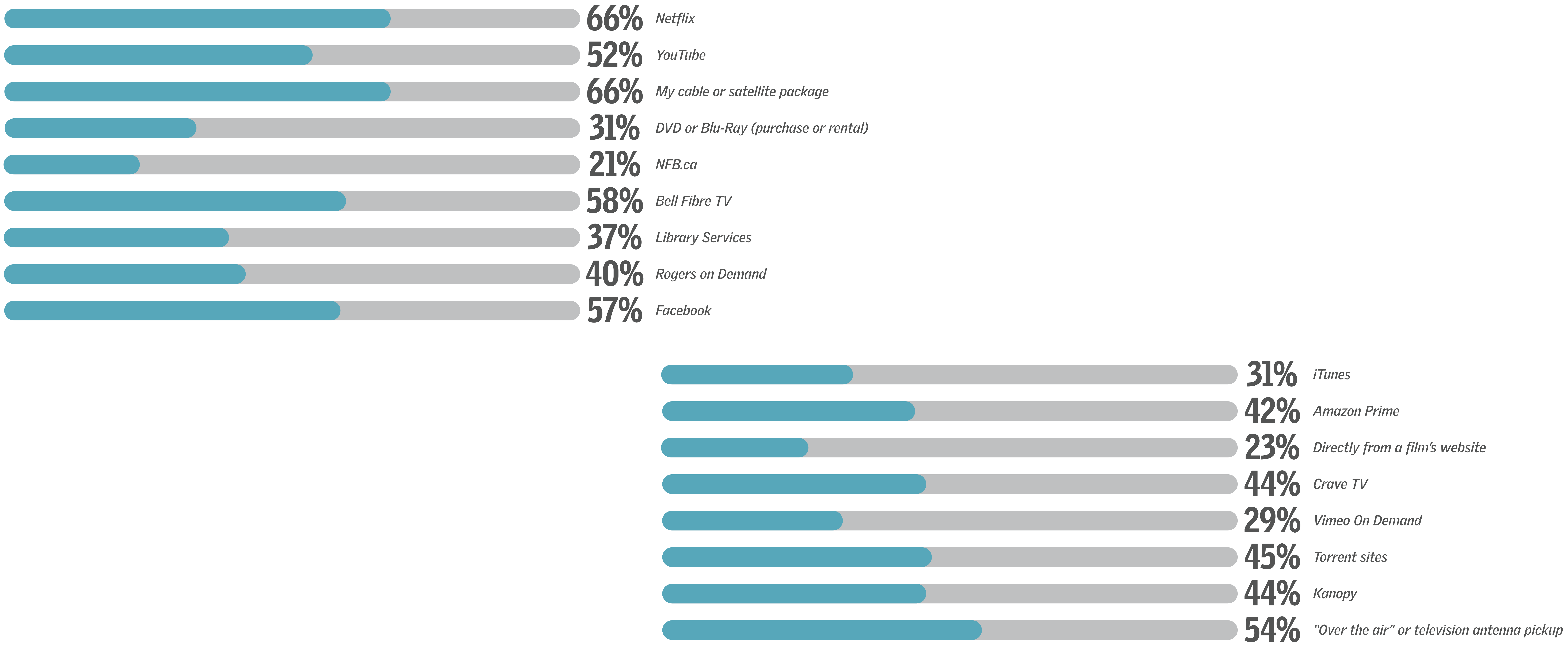






Q11. % WHO FREQUENTLY WATCH DOCS ON THIS PLATFORM

(Bases vary by platform based on Q6)

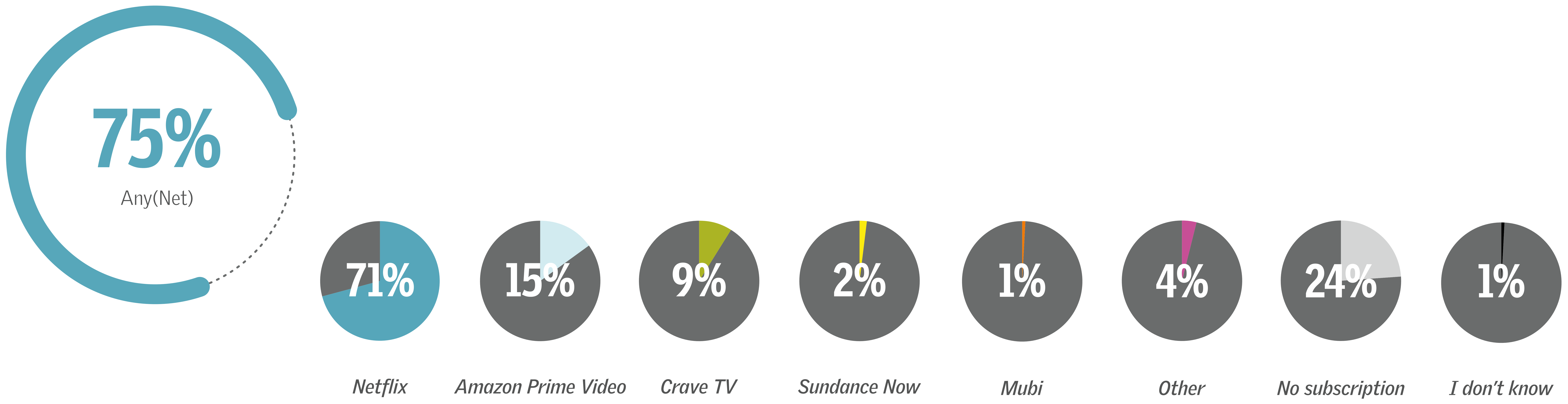


NETFLIX DOMINATES

While 98% use a variety of platforms to view documentaries, only **75% have a subscription to a video streaming platform, of which Netflix is, by far, the most popular.** (Again, Netflix is least popular in Quebec (60% have a paid subscription) and its popularity steadily decreases with age (Millennials: 89% vs. those 55+: 67%)

Q16. PLATFORMS WHERE RESPONDENTS HAVE A PAID SUBSCRIPTION

(Documentary watchers n=3586)



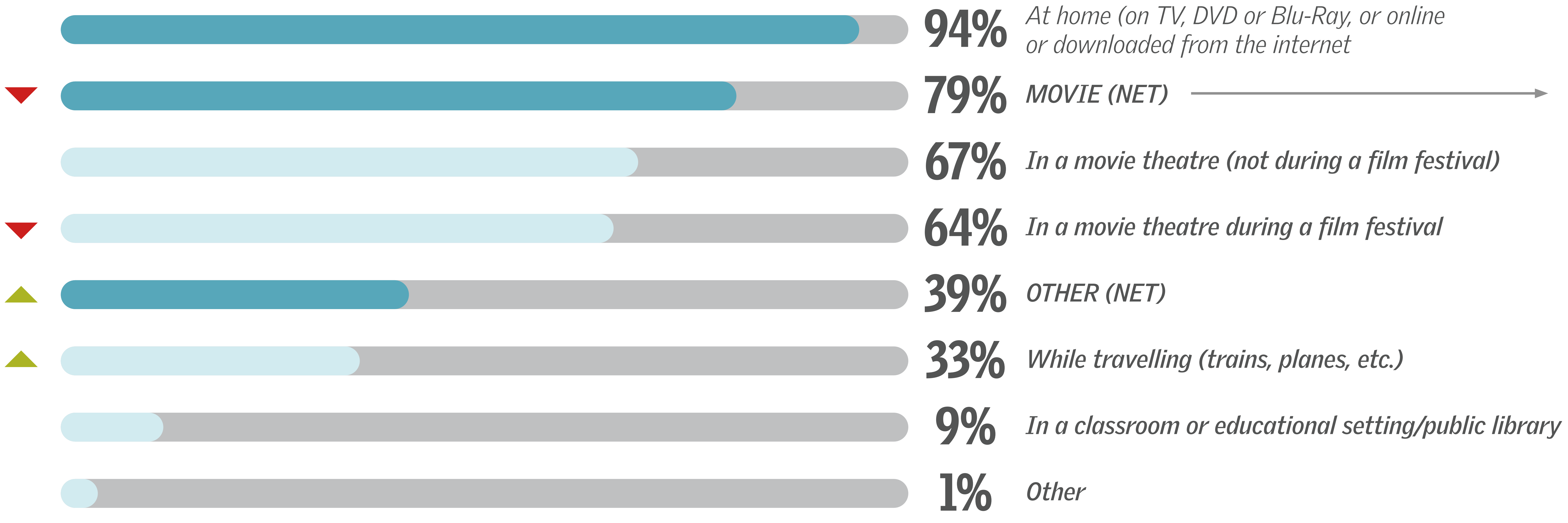
Viewership Location

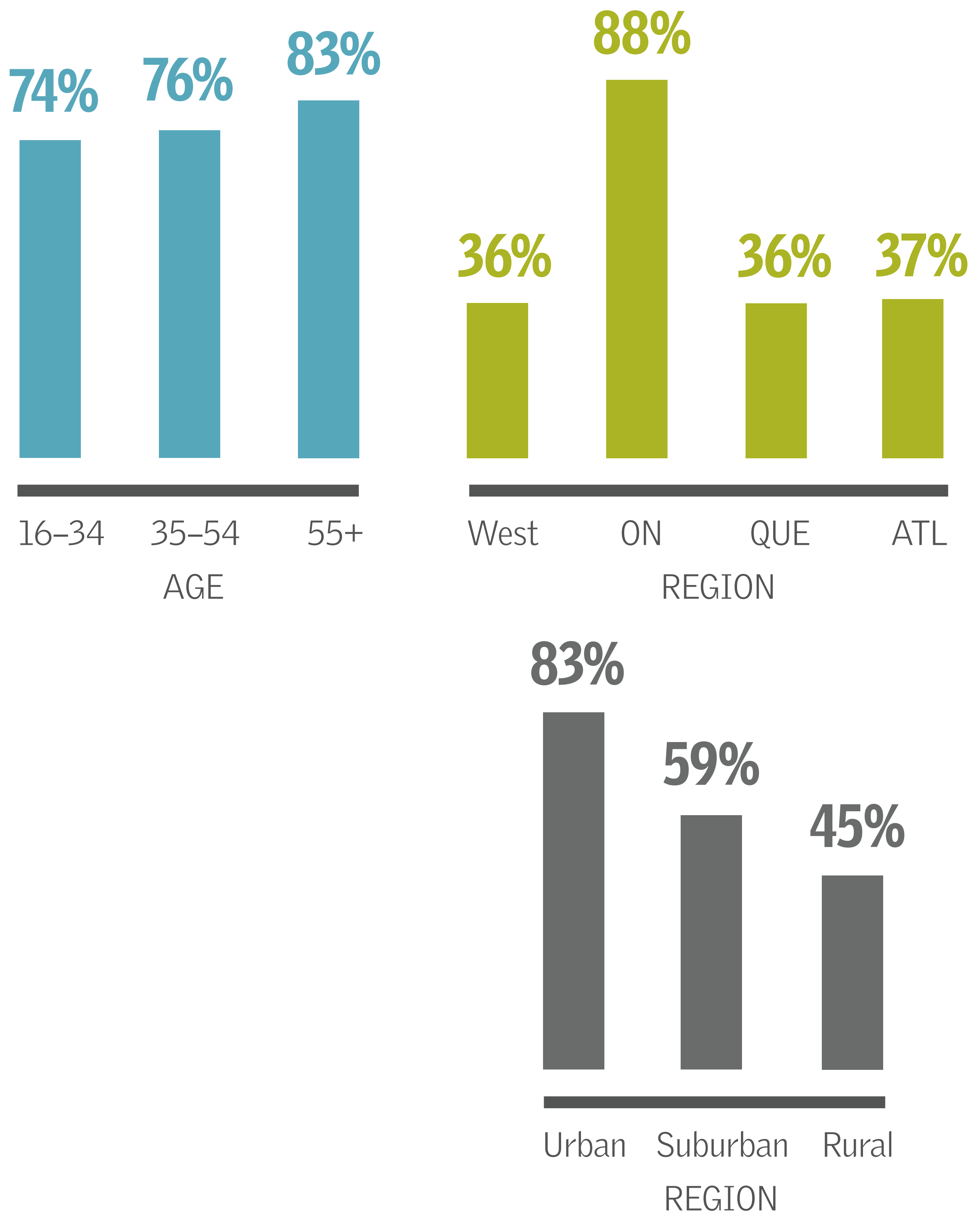
VIEWINGS ARE LARGELY TAKING PLACE AT HOME.

Documentary viewing is largely taking place at home (94%), followed by at a movie theatre (79%). But this isn't anything new: these percentages are largely in line with data collected in 2014 in that these two locations remain, by far, the most popular ones. Notably, fewer audiences have reported watching docs in theatres during a film festival (64% vs. 81% in 2014). This could be attributed to a sampling difference between the 2014 and 2018 surveys. This year, the survey was distributed to a larger audience which was not focused as extensively on Festival partners. The survey has also shown an increase in documentary viewing while travelling (33% vs. 26% in 2014).

Movie theatre viewership is extremely popular in Ontario (Hot Docs Ted Rogers Cinema is a specific example of this success) and naturally, it's more popular in urban areas where close proximity to a theatre is most likely. It's also more popular among older respondents 55+ and women (84% vs. 66% among men).

Q4. LOCATIONS
(Documentary watchers n=3586)





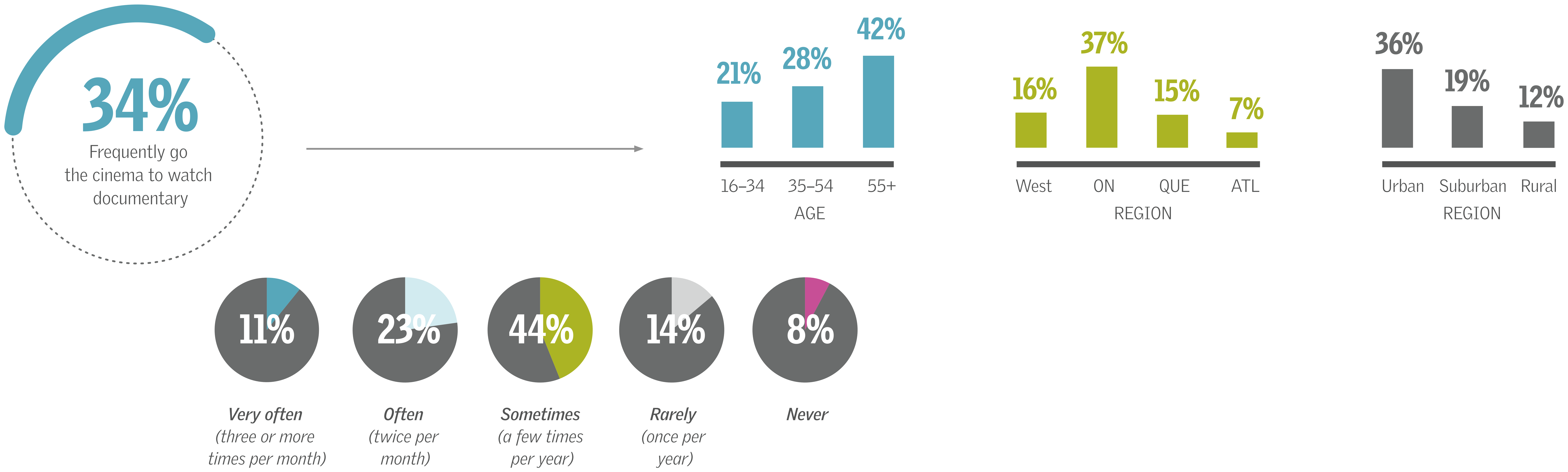
33% FREQUENTLY GO TO THE CINEMA FOR A DOCUMENTARY.

One in three respondents go to the cinema more than twice a month or more to see a documentary. An outstanding 11% go more than three times a month. There is a strong segment of doc audiences that want to watch their documentaries in a cinema setting.

Demographically, frequent viewership is very popular in Ontario (and naturally, it's more popular in urban areas in close proximity to a theatre). It's also more popular among older respondents 55+ (in fact, frequent viewership actually increases steadily along with age) and among women (35% vs. 28% among men).

Q8. CINEMA FREQUENCY IN ORDER TO WATCH A DOCUMENTARY

(Documentary watchers n=3586)



DOCUMENTARY FEATURE FILMS CONTINUE TO LEAD THE PACK.

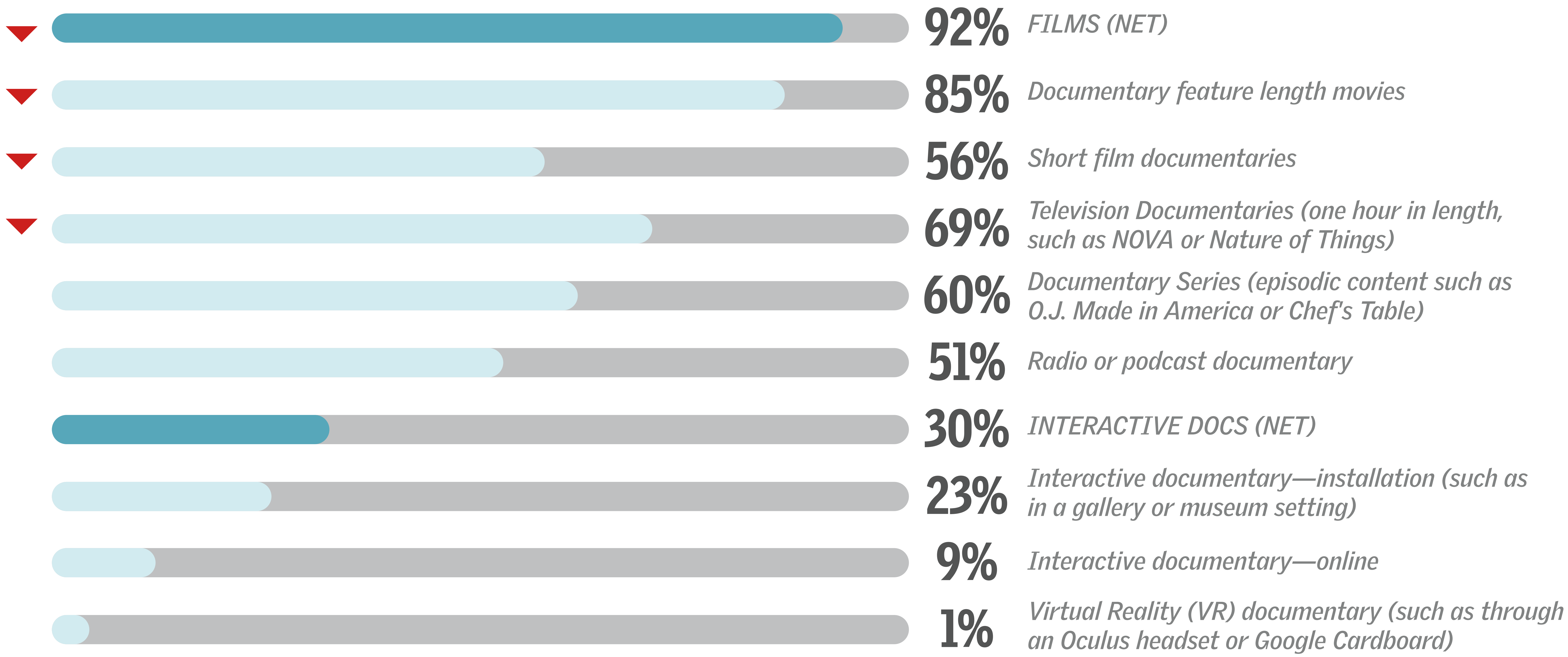
In terms of the types of documentaries being watched, **feature-length films are clearly the most popular despite having lost a bit of traction since 2014 (85% vs. 92% in 2014)**. In DAR 2018, we also asked audiences about documentary series, radio and/or podcast documentaries, interactive documentaries, and virtual reality documentaries.

Demographically . . .

- Films (feature length or short) are popular in Ontario (95%), in urban settings, and among women (94%).
- Television documentaries, though least popular in Quebec (58%), tend to gain popularity along with age (Millennials: 60%, 35-54: 68%, 55+: 73%). Documentary series, on the other hand, tend to lose their appeal with age (Millennials: 73%, 35-54: 65%, 55+: 53%), along with interactive documentaries and virtual reality documentaries.
- Both online interactive documentaries and virtual reality documentaries are quite popular in Quebec (27% and 16%, respectively).
- Finally, radio and/or podcast documentaries appeal to more women (52%) than men (46%).

Q2+Q3. DOCUMENTARY TYPES BEING WATCHED

(Documentary watchers n=3586)



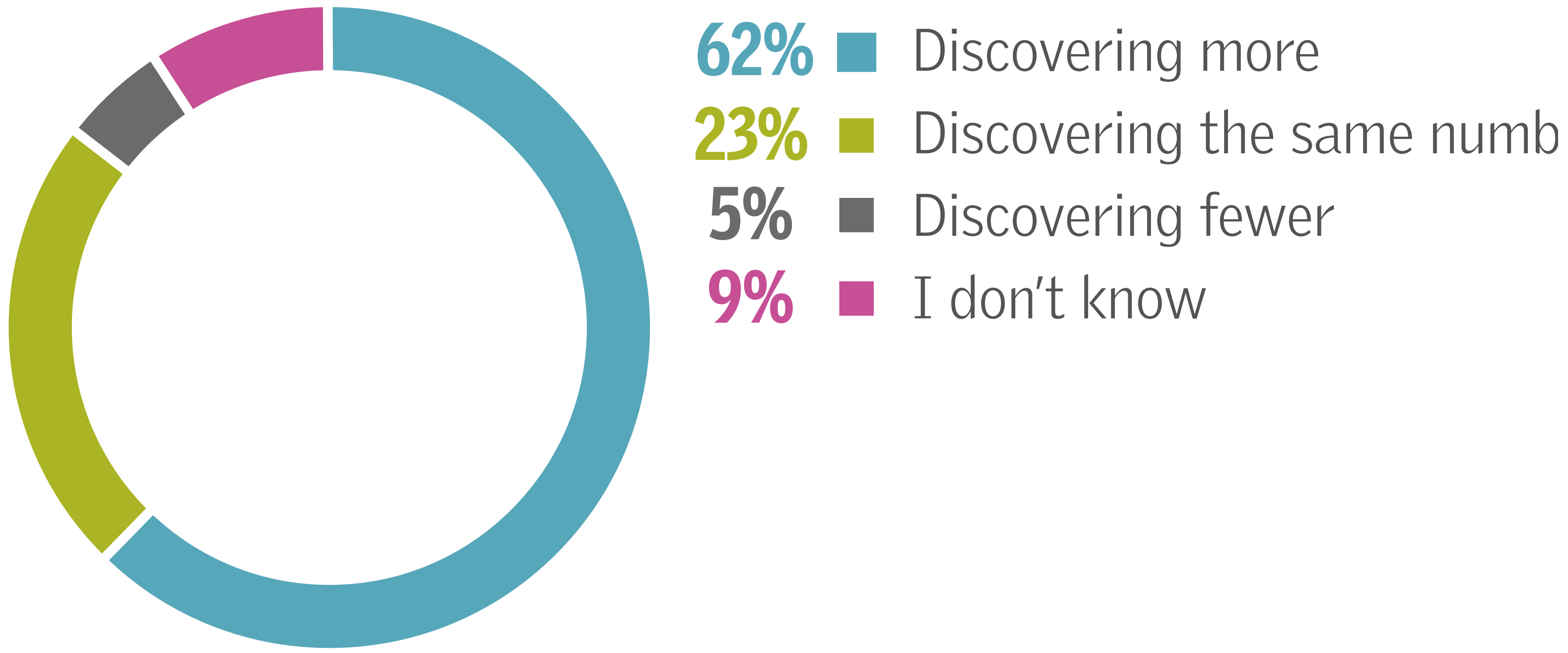
Discovering Documentaries

RESPONDENTS ARE DISCOVERING MORE DOCS THAN BEFORE.

Respondents perceive that **the profile and marketing of documentary films has become more prominent in their day-to-day life than it was three years ago**. This means respondents are finding more documentaries than they used to, especially among those in Ontario (65%), those 55+ (67%), and women (65%). As reported earlier, the more access or exposure this audience has to documentaries, the more they are consuming.

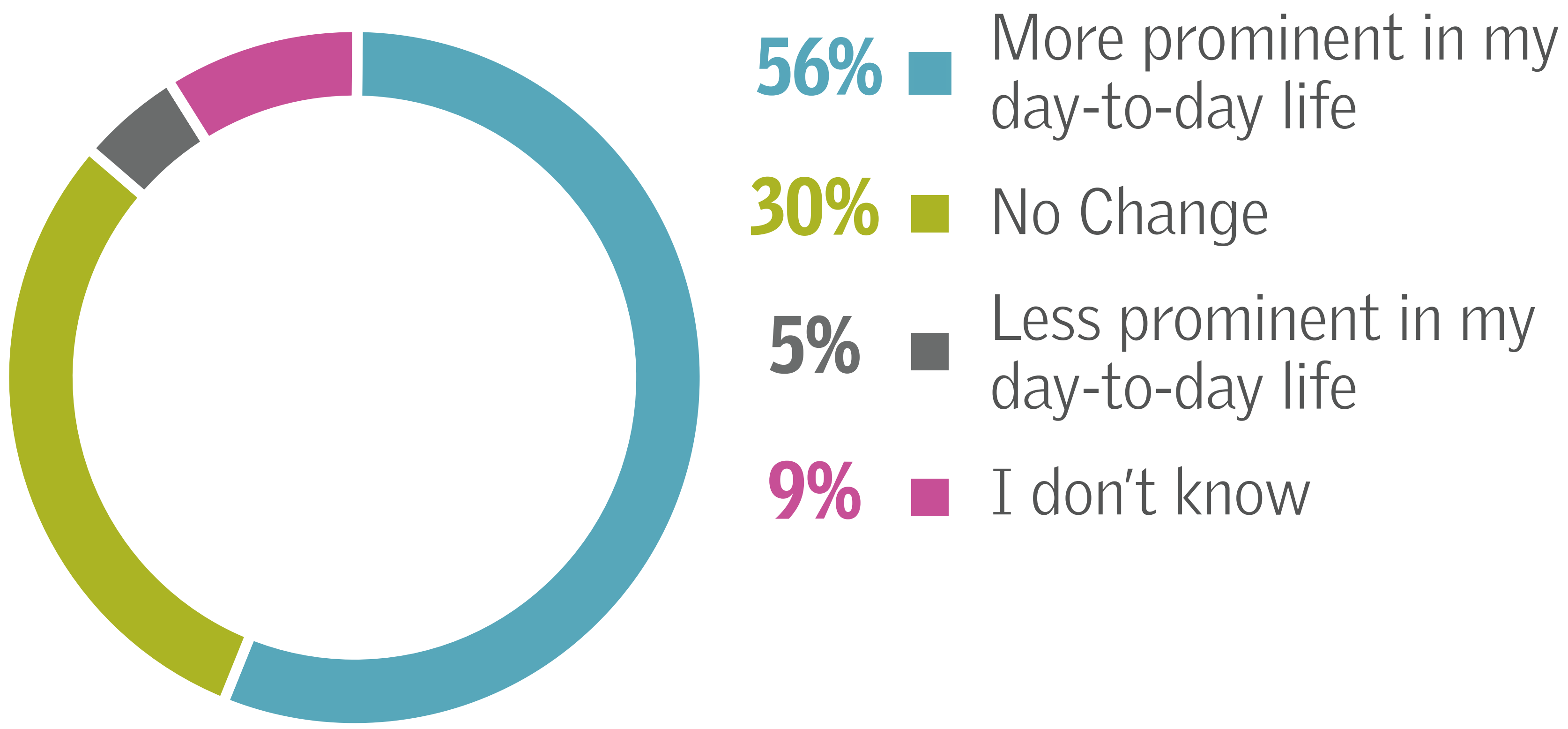
Q27. FINDING DOCS vs. THREE YEARS AGO

(Documentary watchers: n=3586)



Q28. THE PROFILE AND MARKETING OF DOCS vs. THREE YEARS AGO

(Documentary watchers: n=3586)

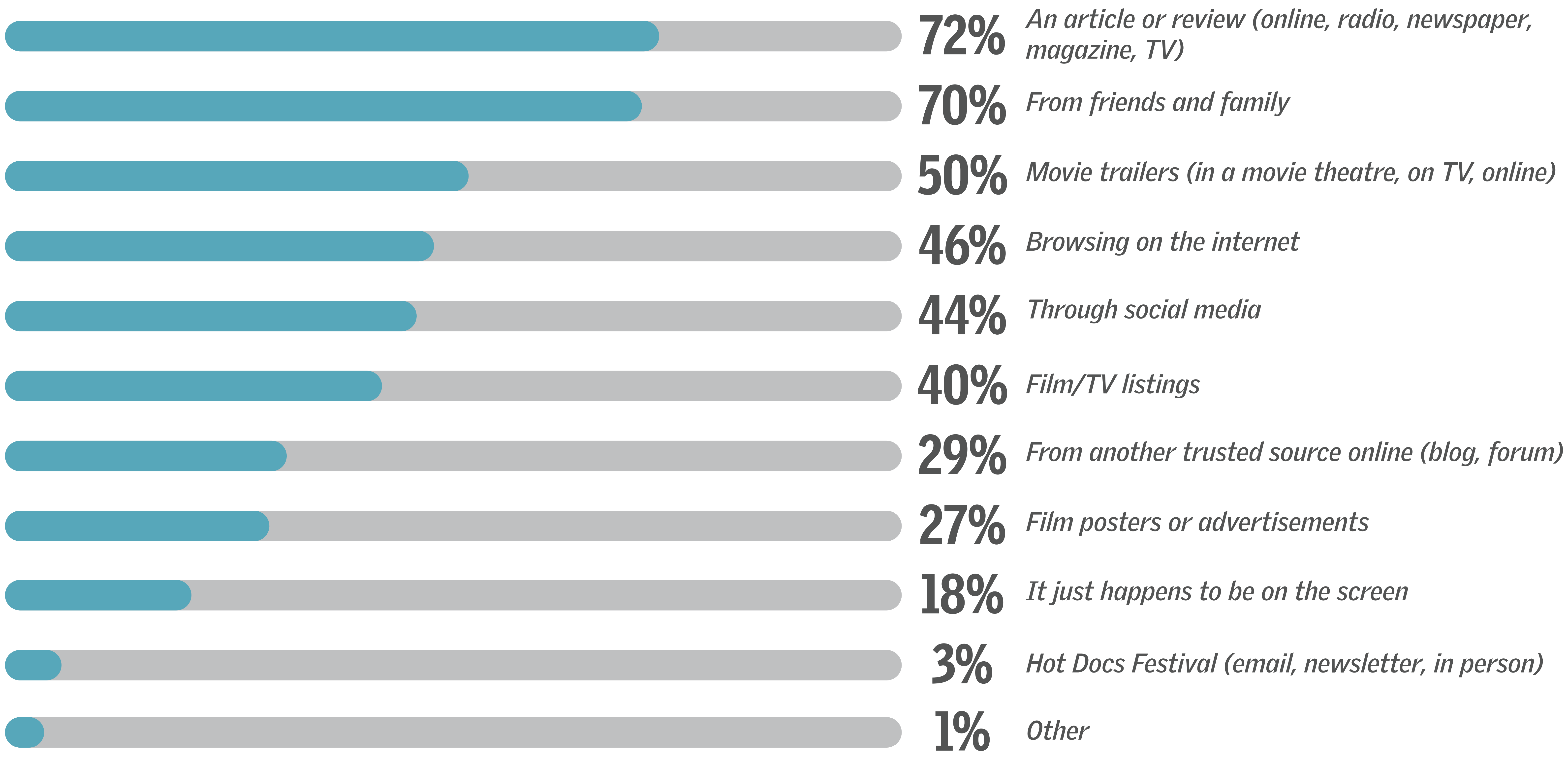


ARTICLES AND REVIEWS INFORM AUDIENCES ABOUT DOCS.

Articles and reviews (online, in print, on TV, or on the radio) and word of mouth from friends and family members are, by far, the most popular ways to discover docs. Demographically, however, there are many interesting differences. Men are more likely to browse the Internet, while women are more likely to rely on movie trailers, social media, and film/TV listings. With respect to age, articles and/or reviews and film/TV listings tend to grow in popularity as one ages, while using the Internet and social media tend to decrease with age. Film posters and ads are more frequently consulted by younger respondents.

Q19. WAYS OF FINDING OUT ABOUT DOCUMENTARIES

(Documentary watchers n=3586)



As another way to discover new films, **over half of those surveyed (55%) have gone to a documentary filmmaker's website in order to discover other films that he or she has worked on**. Though it's somewhat more likely for men to do this than women (58% vs. 54%, respectively), as well as younger respondents (16-54: 61% vs. 49% among those 55+) – especially those 35-54 (63%) – it's less likely to happen in Quebec (46%).

Q38. VISITING A DOCUMENTARY FILMMAKER'S WEBSITE

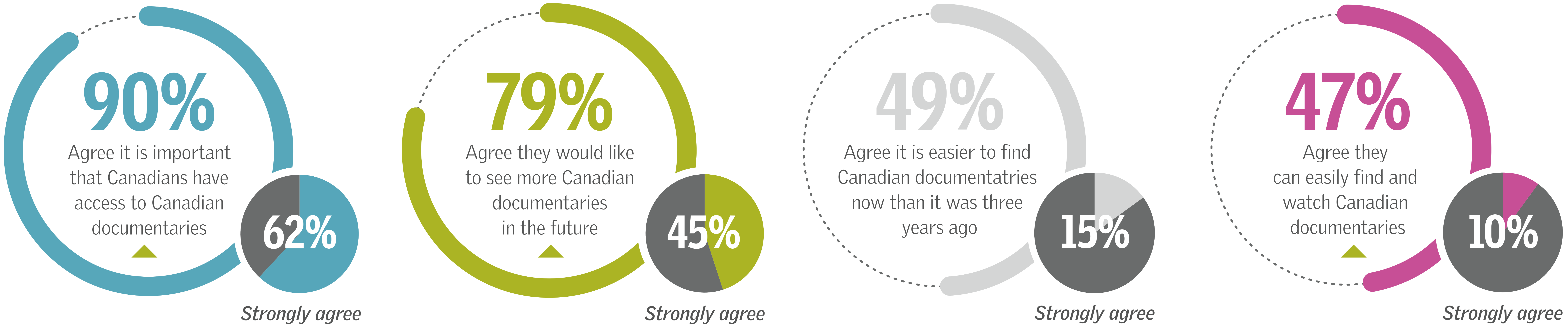
(Documentary watchers: n=3586)

CANADIAN CONTENT IS ON THE RISE, AND RESPONDENTS REALIZE THIS. THEY JUST HAVE TROUBLE FINDING IT.

The vast majority (90%) agrees it's important that Canadians (a) have access to Canadian documentaries and (b) would like to see more Canadian documentaries in the future (79%), less than half (47%) can easily find a Canadian documentary to watch. The good news is that progress is already being made on that front: about half (49%) believe it has become easier to find Canadian documentaries, compared to just three years ago. In addition, more respondents than ever believe they can easily find and watch Canadian documentaries, relative to 2014 (10% vs. 7% four years ago).

Q30. AGREEMENT LEVELS

(Documentary watchers: n=3586)

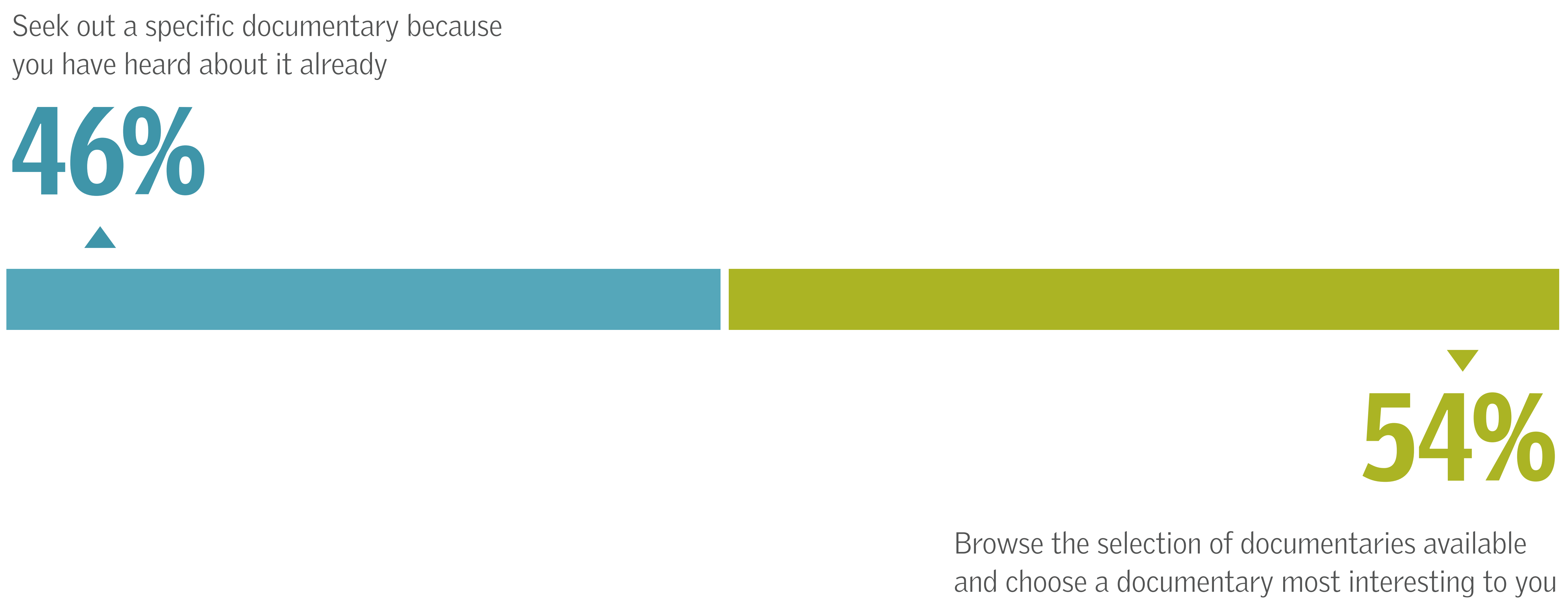


PICKING A DOCUMENTARY TO WATCH

When watching a documentary at home, **respondents are divided between searching for a particular documentary (46%) and simply browsing what's available and making a decision based on what's most interesting to them (54%)**. Those more likely to have something in mind ahead of time tend to be older (55+: 49% vs. 44% among those younger than that).

Q18. BROWSING vs. SEARCHING FOR SOMETHING SPECIFIC

(Documentary watchers n=3586)



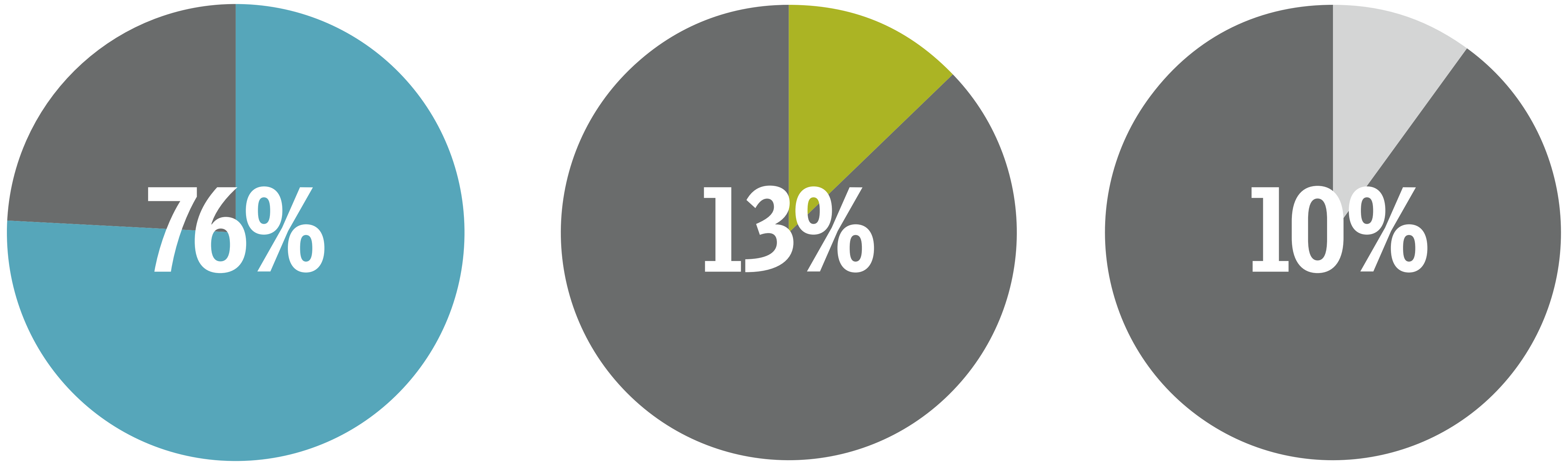
FILM TRAILERS ARE IMPORTANT.

Film trailers also play an important role in the selection process, say 76% of respondents, and when forced to rank the relative importance of various things that influence their decision to watch a particular documentary, the film's trailer ends up ranking within the top five influences, ranking behind things like recommendations (both personal and professional) and trusted curators of the film.

Just like in 2014, recommendations (personal or professional) rank higher than anything else. In fact, **the top five influences are the same as they were four years ago**.

Q33. THE IMPORTANCE OF MOVIE TRAILERS

(Documentary watchers n=3586)



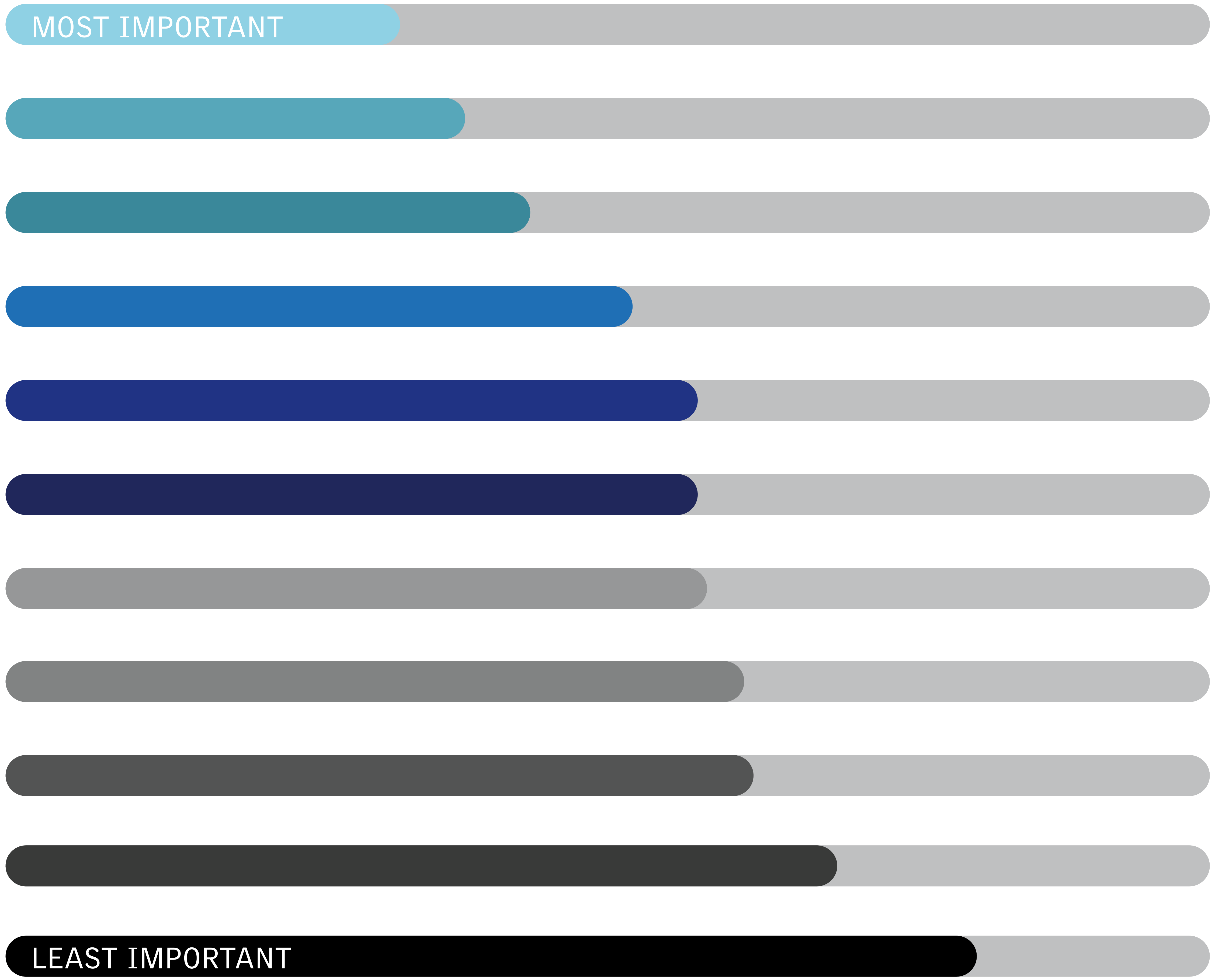
Very important / Somewhat important

Neutral

Not very important/ Not at all important

Q24. A RANKNG OF INFLUENCES WHEN DECIDING TO WATCH A DOCUMENTARY

(Documentary watchers n=3586) RANKING: 1 = MOST IMPORTANT; 12 = LEAST IMPORTANT



3.8 *Recommended in an article ore review (online, radio, newspaper, magazine, TV)*

4.5 *It has been curated by a trusted source (film festival, rep cinema, subscription series)*

5.2 *Movie trailer (viewed in a movie theatre, on TV, online)*

6.3 *Recommended through other trusted source online (blog, forum)*

7.0 *Film/TV listing*

7.0 *Prominence of viewing platform (Netflix, Amazon Prime)*

7.1 *I was browsing online and landed on it*

7.5 *Recommended on Social Media*

7.6 *Poster or advertisement*

8.5 *It just happened to be on the screen*

10.2 *Contributed to a crowdfunding campaign (e.g. on Kickstarter, Indigogo)*

NETFLIX AND WORD OF MOUTH ARE TOP INFLUENCERS FOR DISCOVERING DOCS.

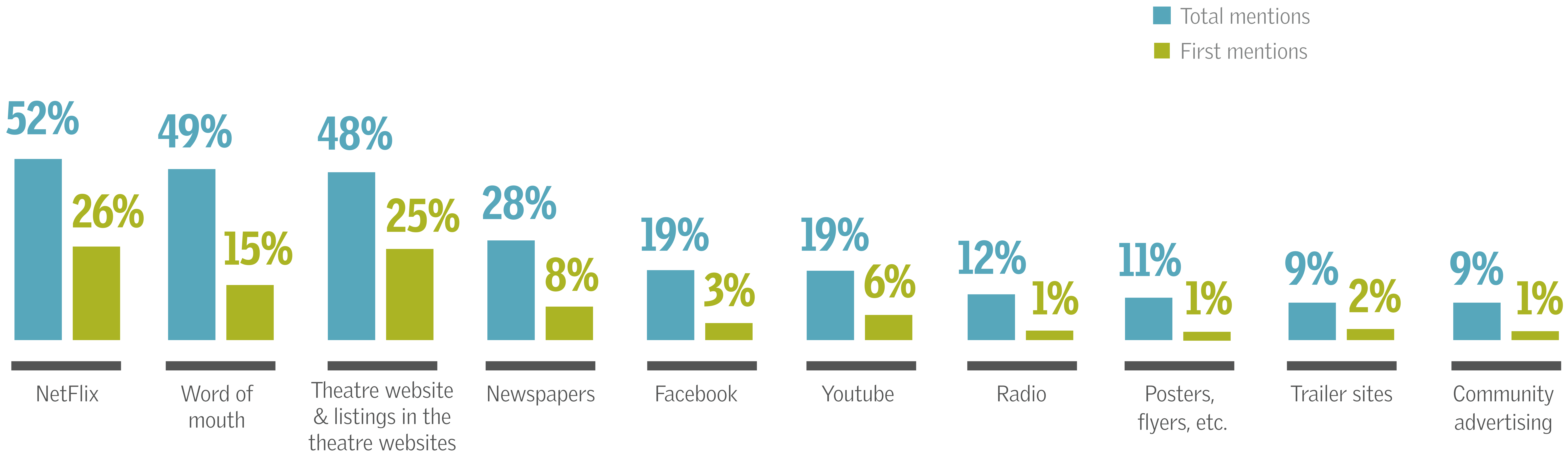
Interestingly, the **first** place audiences search to discover docs is Netflix (26%) and movie theatre websites/ listings (25%). Word of mouth, at 15%, while not as likely to be the first place audiences go for discovering docs, still ranks highly as an overall influence when it comes to picking a documentary to watch.

Demographically . . .

- Age plays a significant role here. While Netflix, as a source, peaks between ages 16 and 34 (68%), it steadily decreases in frequency as age increases (55+: 44%); the same is true for YouTube and trailer sites. The opposite is true for newspapers and radio. Also, theatre websites and listings are more the domain of older respondents (55+: 54%) rather than anyone younger (43%).
- Since men are more likely to browse the Internet when searching for a documentary to watch (see Q19, slide 28), it's not surprising to find out that they're more likely to use online tools like YouTube, Facebook, and trailer sites. Women, however, are more likely to employ nearly all the other ones listed – all except newspapers, flyers, and posters.
- Regionally, Quebecers appear less likely to use the first four sources listed, but they're more likely to use YouTube than any other region (37% vs. 17% for the rest of the country).

Q31. THE TOP TEN SOURCES, WHEN PICKING A DOCUMENTARY TO WATCH

(Documentary watchers n=3586)



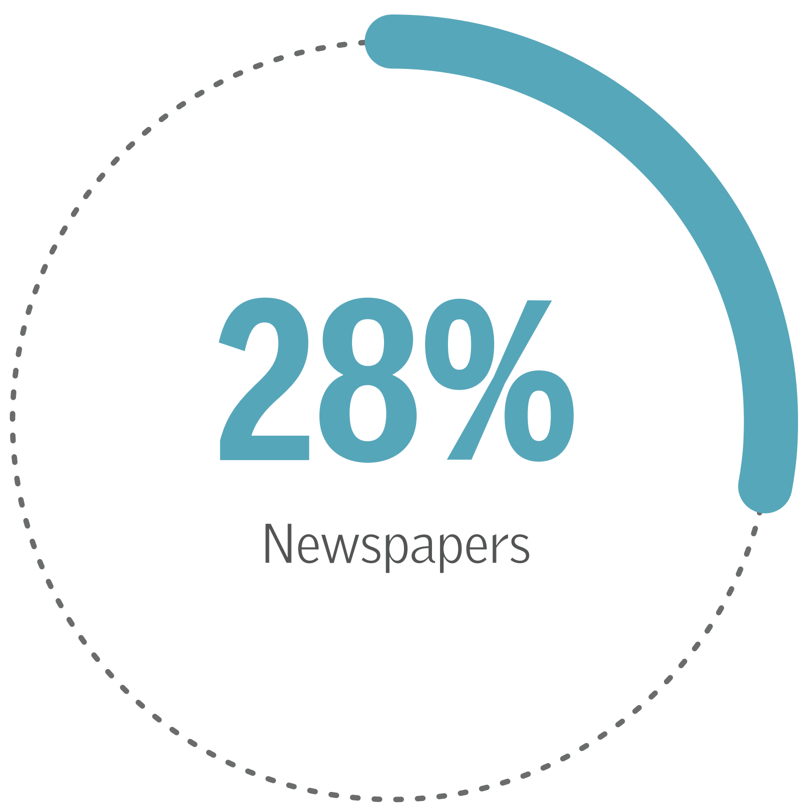
NEWSPAPERS SERVE TO HELP DISCOVER DOCS.

Among those using a newspaper to help them pick a documentary to watch, **specialty papers focused on the arts are less frequently used than national and local newspapers**. (They are, however, favoured by younger respondents [16-34: 65% vs. 35+: 50%].)

Reviews are mainly what these people are after.

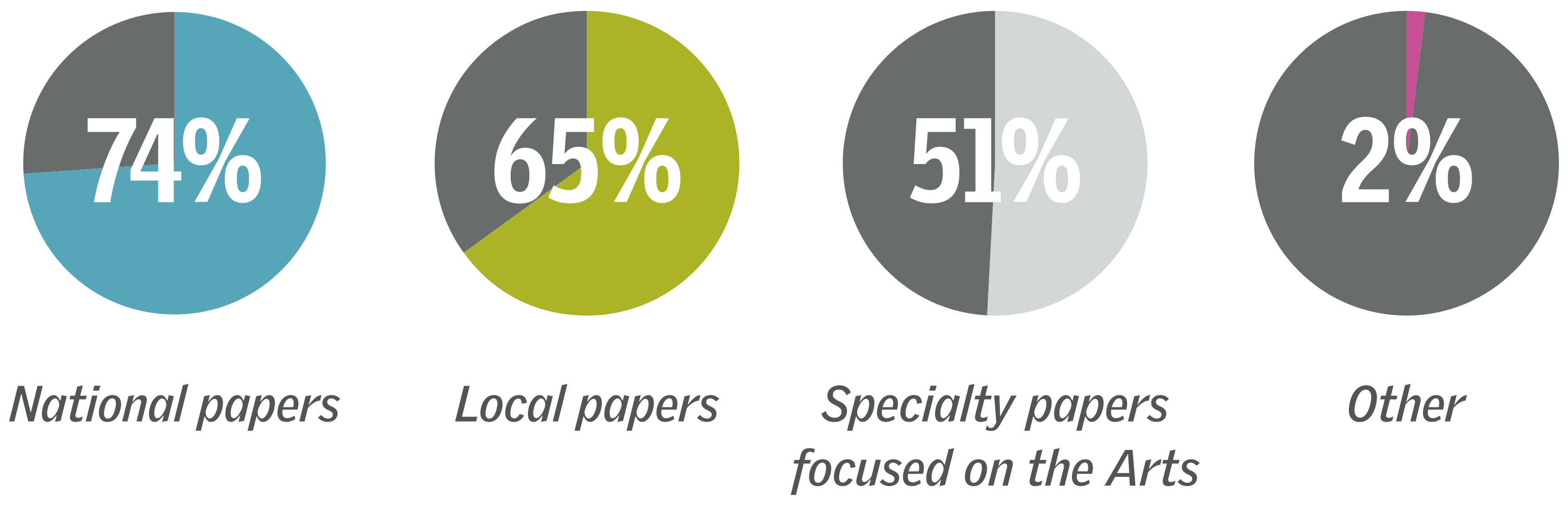
Q31. SOURCES, WHEN PICKING A DOCUMENTARY TO WATCH

(Documentary watchers n=3586)



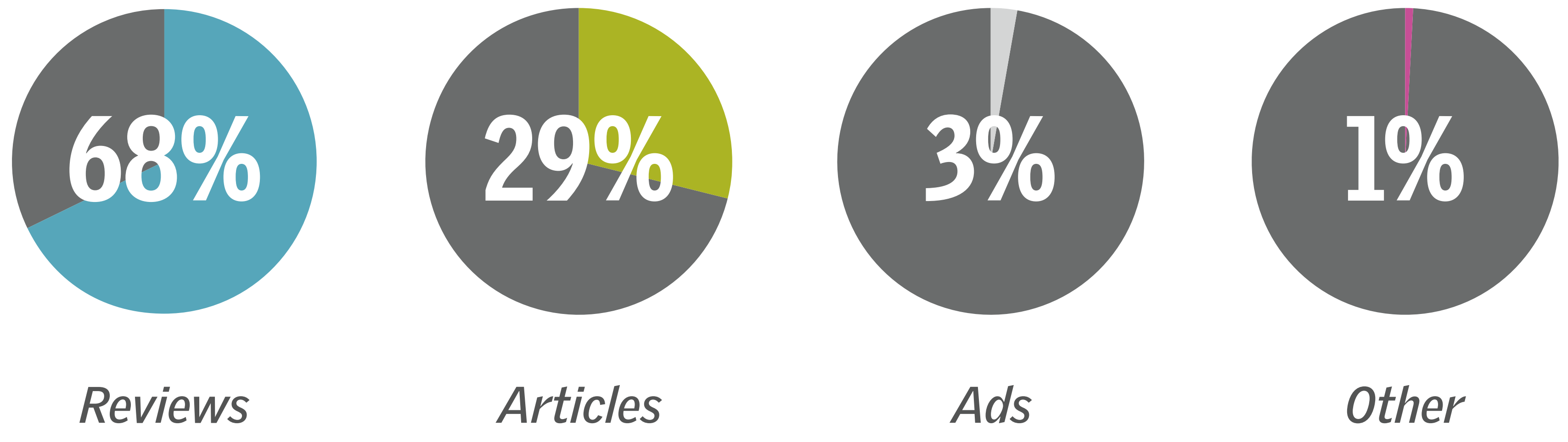
Q36. COMMON NEWSPAPER SOURCES

(Those who use a newspaper to discover documentaries n=1001)



Q37. COMMON SOURCES OF INFO WITHIN THE NEWSPAPER

(Those who use a newspaper to discover documentaries n=1001)



FRIENDS SUGGEST DOCS ON FACEBOOK.

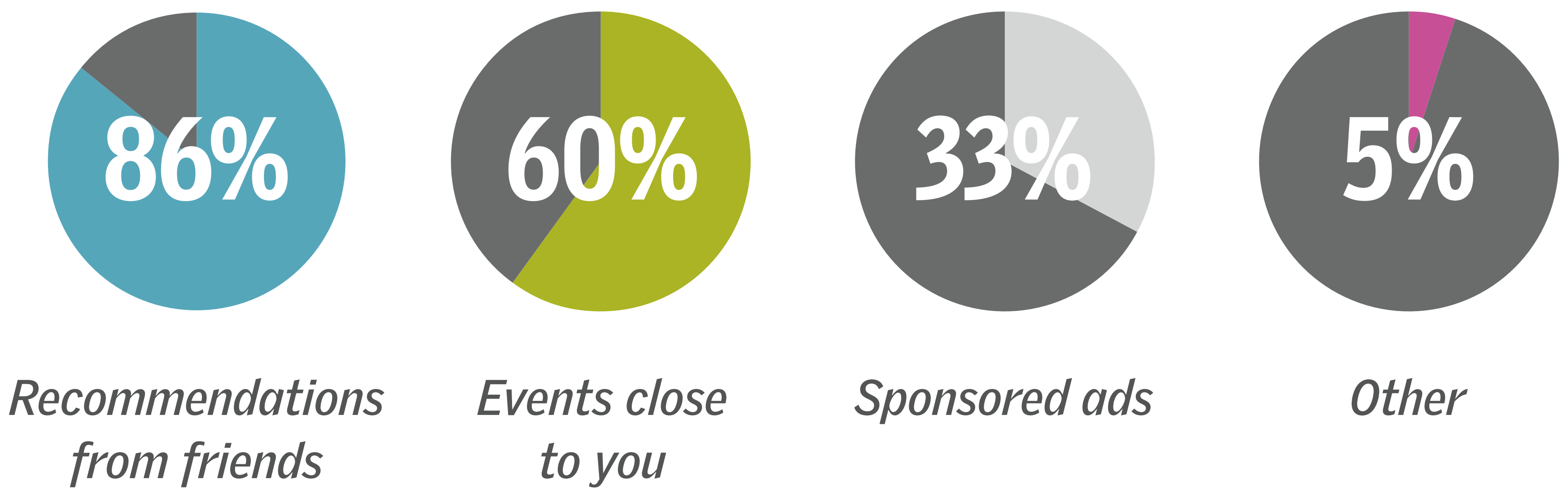
Among those using Facebook to help them pick a documentary to watch, **nearly nine-in-ten (86%) rely on recommendations from friends** (especially women), **and six-in-ten use it to keep tabs on upcoming events in their area** (here, too, women are more likely).

Q31. SOURCES, WHEN PICKING A DOCUMENTARY TO WATCH

(Documentary watchers n=3586)

Q35. COMMON WAYS OF USING FACEBOOK

(Those who use Facebook to discover documentaries n=681)

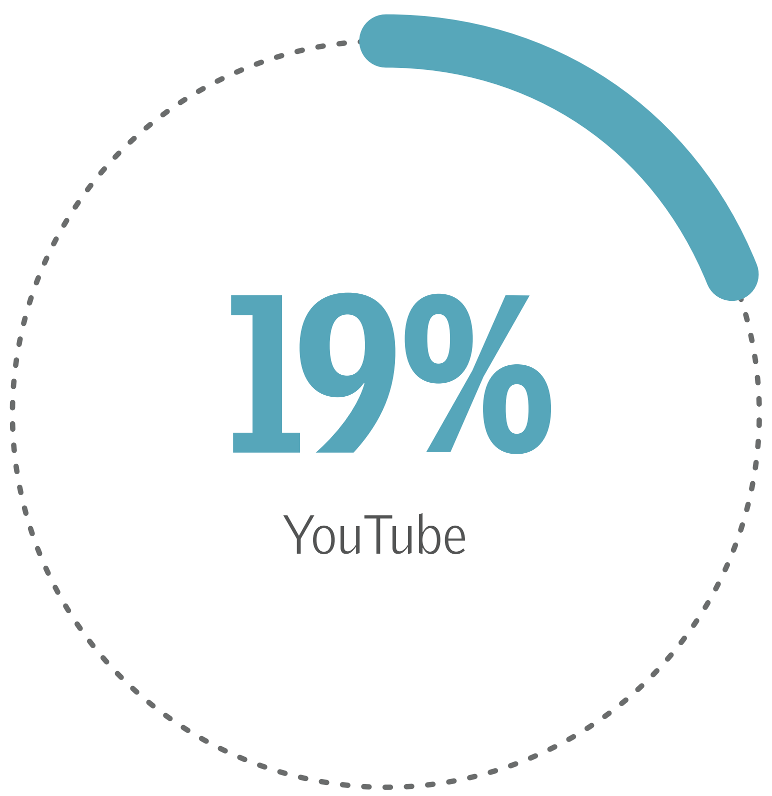


USING YOUTUBE? AUDIENCES JUST USE THE SEARCH FUNCTION.

Among those using YouTube to help them pick a documentary to watch, **the vast majority use the search function to obtain results, though many (44%) actually view specific trailer channels**, particularly younger respondents (16-34: 52% vs. 40% among those 35+). Filmmaker channels are much less popular, and virtually no one pays any attention to the recommendations suggested to them.

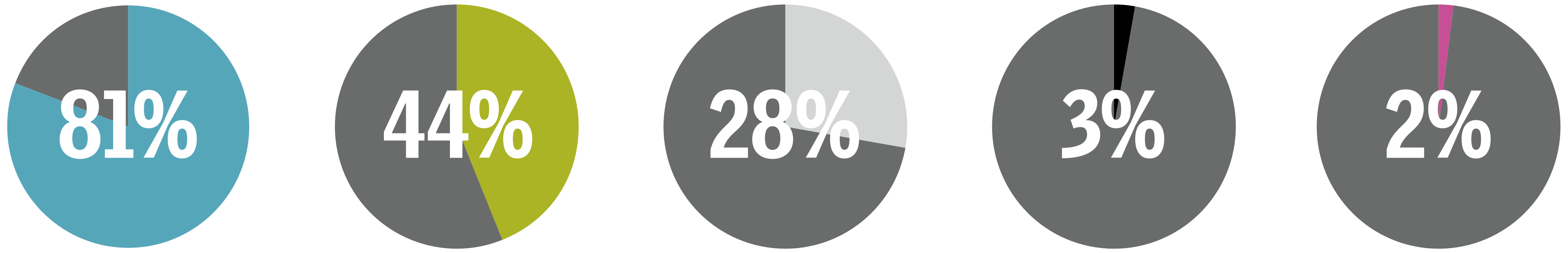
Q31. SOURCES, WHEN PICKING A DOCUMENTARY TO WATCH

(Documentary watchers n=3586)



Q34. COMMON WAYS OF USING YOUTUBE

(Those who use YouTube to discover documentaries n=675)



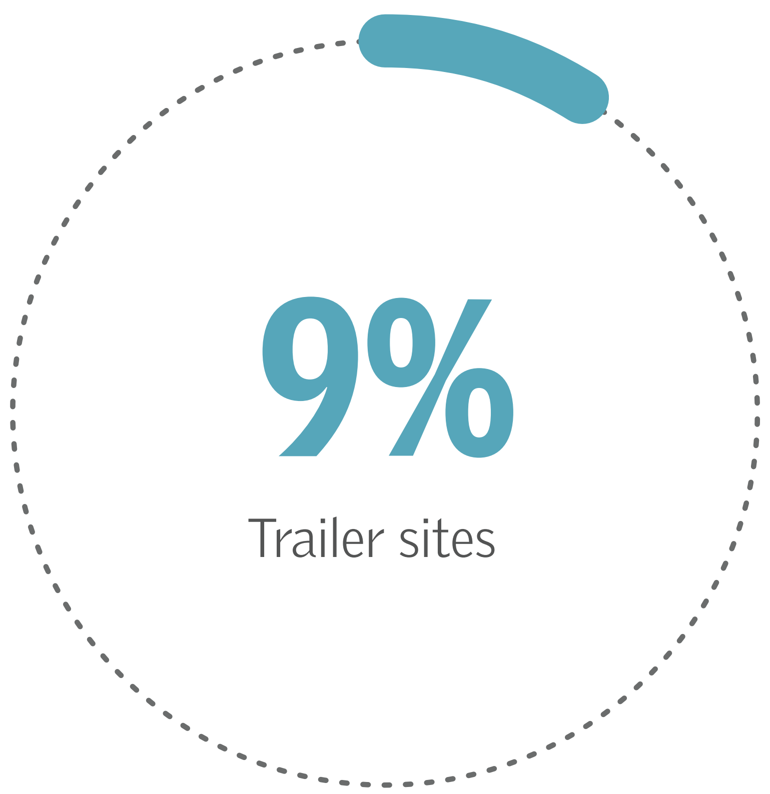
Using the search function | *Viewing trailer channels* | *Viewing filmmaker channels* | *Getting them recommended/ suggested to me* | *Other*

FORGET SPECIFIC TRAILER SITES. JUST USE YOUTUBE.

Though relatively few (just 9%) use trailer sites to help them pick a documentary to watch, **respondents who do tend to use YouTube more frequently than anything else.**

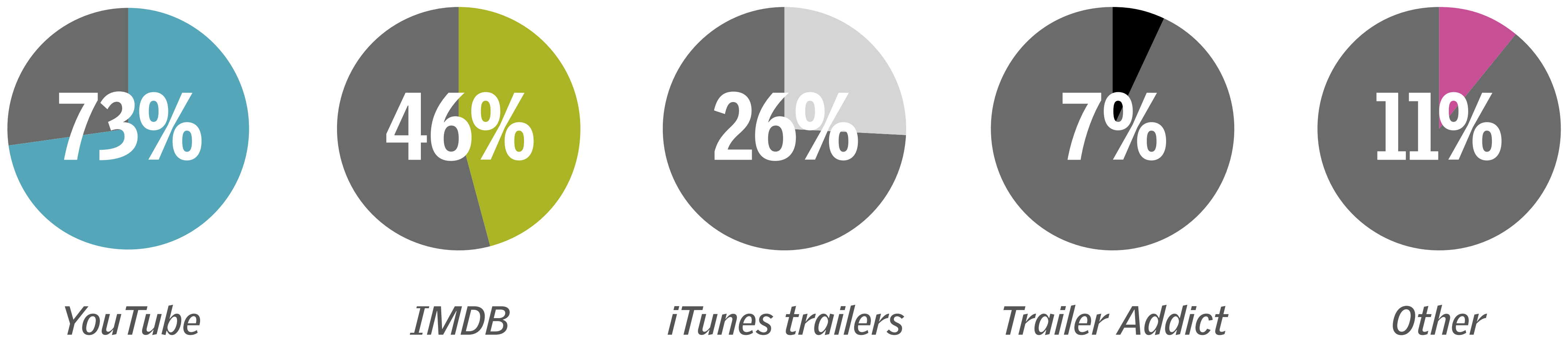
Q31. SOURCES, WHEN PICKING A DOCUMENTARY TO WATCH

(Documentary watchers n=3586)



Q32. TRAILER SITES USED

(Those who use trailer sites to discover documentaries n=332)

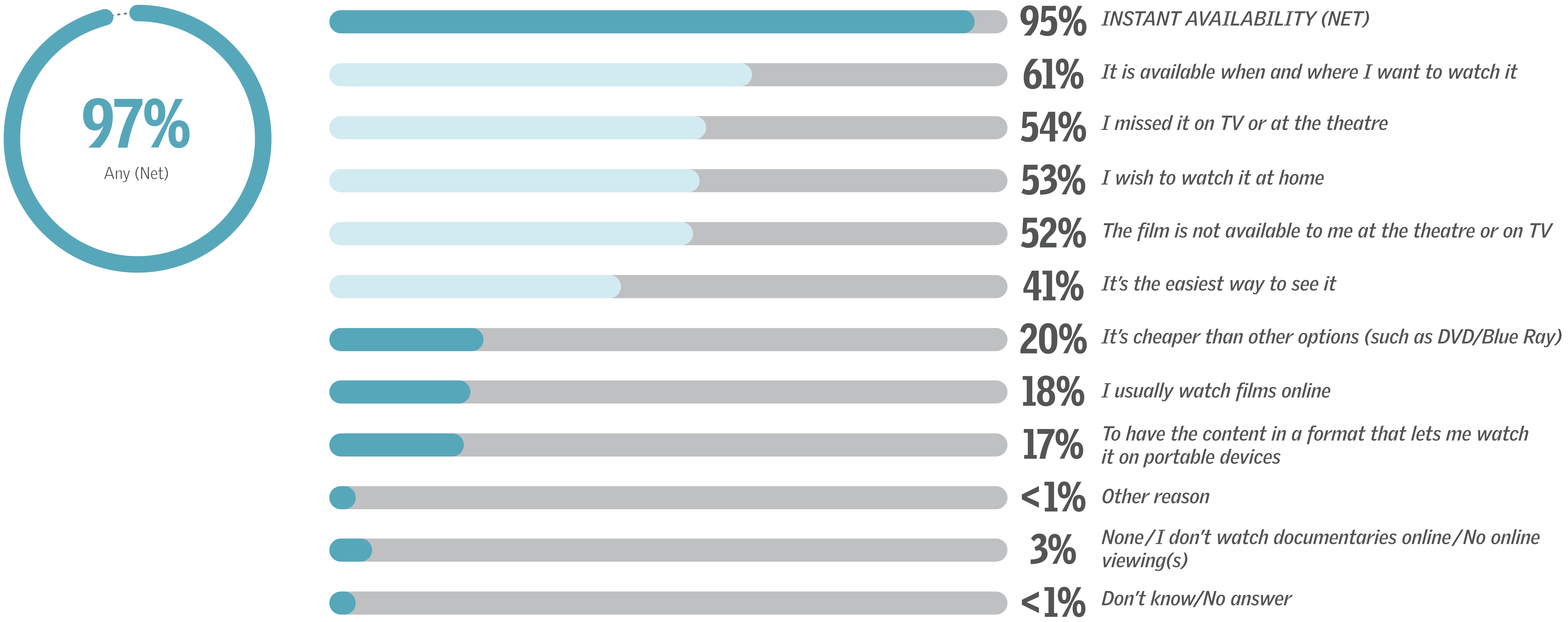


AVAILABILITY TRUMPS THINGS LIKE COST AND PORTABILITY.

More than anything else, **respondents watch documentaries online or download them from the Internet because they're immediately available exactly *when* and *where* they want to watch them**. In any case, instant availability trumps things like cost, portability, or even a penchant for watching films online. Reasons of instant availability, cost, and being in the habit of watching films online are all more likely to be mentioned by younger respondents 16-34 years of age, but the tendency to do so declines with age.

Q17. REASONS FOR WATCHING A DOC ONLINE OR DOWLOADING ONE FROM THE INTERNET

(Documentary watchers n=3586)



Paying for Documentaries

AUDIENCE ARE WILLING TO PAY FOR DOCUMENTARY CONTENT.

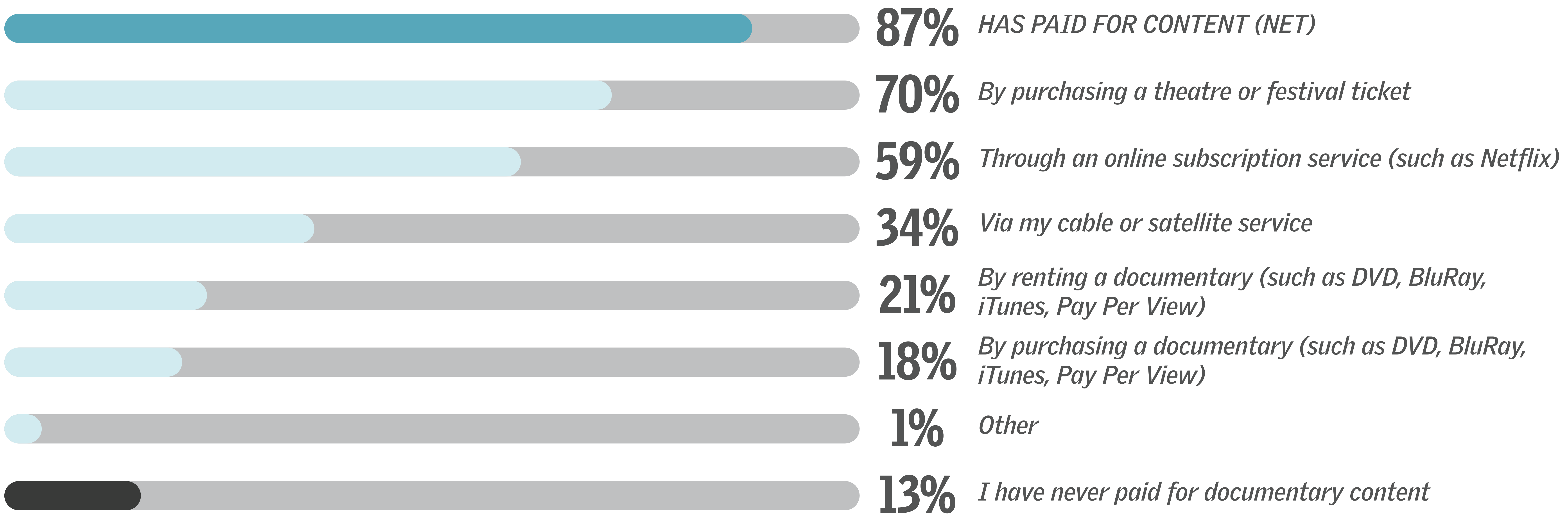
In the past year, 87% have paid for documentary content, such as by purchasing a theatre or festival ticket, through an online subscription service (like Netflix), via their cable or satellite package, and/or by purchasing or renting a documentary. Surprisingly, respondents tend to be younger (16-54: 90% vs. 83% for those 55+), female (88% vs. 83% for men), and living in an urban area (88% vs. 78% living in a suburban area and 73% living in a rural area).

However, they're least likely to come from Quebec (63% vs. 88% for the rest of the country).

Thirteen percent have not paid for documentary content within the past year, and demographically, they tend to be the flipside of what's listed above (i.e. 55+, men, Quebecers, and living in a suburban or rural setting).

Q14. WAYS OF PAYING FOR DOCUMENTARY CONTENT IN THE PAST YEAR

(Documentary watchers n=3586)



AUDIENCES ARE WILLING TO PAY FOR DOCUMENTARY CONTENT.

The pricing questions revealed the following:

- To attend **a documentary screening at a theatre or festival**, most (61%) are willing to pay least $11.00, with 54% indicating they'd be willing to pay somewhere between $11.00 and $19.99.
- The vast majority (86%) believe that **renting a documentary** should be <$11.00, with over half (54%) pegging it at somewhere between $0.01 and $5.99.
- Respondents have a sliding scale of value with the idea of how much it should cost **to buy a documentary**.
- Most (64%) indicate that they'd pay <$11.00 for **an online subscription for documentaries**, with 18% indicating it should be free.
- To view **a documentary via a cable or satellite service**, 63% say the price would need to be $5.99 or less, with 32% saying it should be free. Twelve percent would be willing to pay a little more (i.e. between $6.00 and $10.99), but few (5%) would pay any more than that.

Q15. PRICE RANGES FOR DOCUMENTARY CONTENT

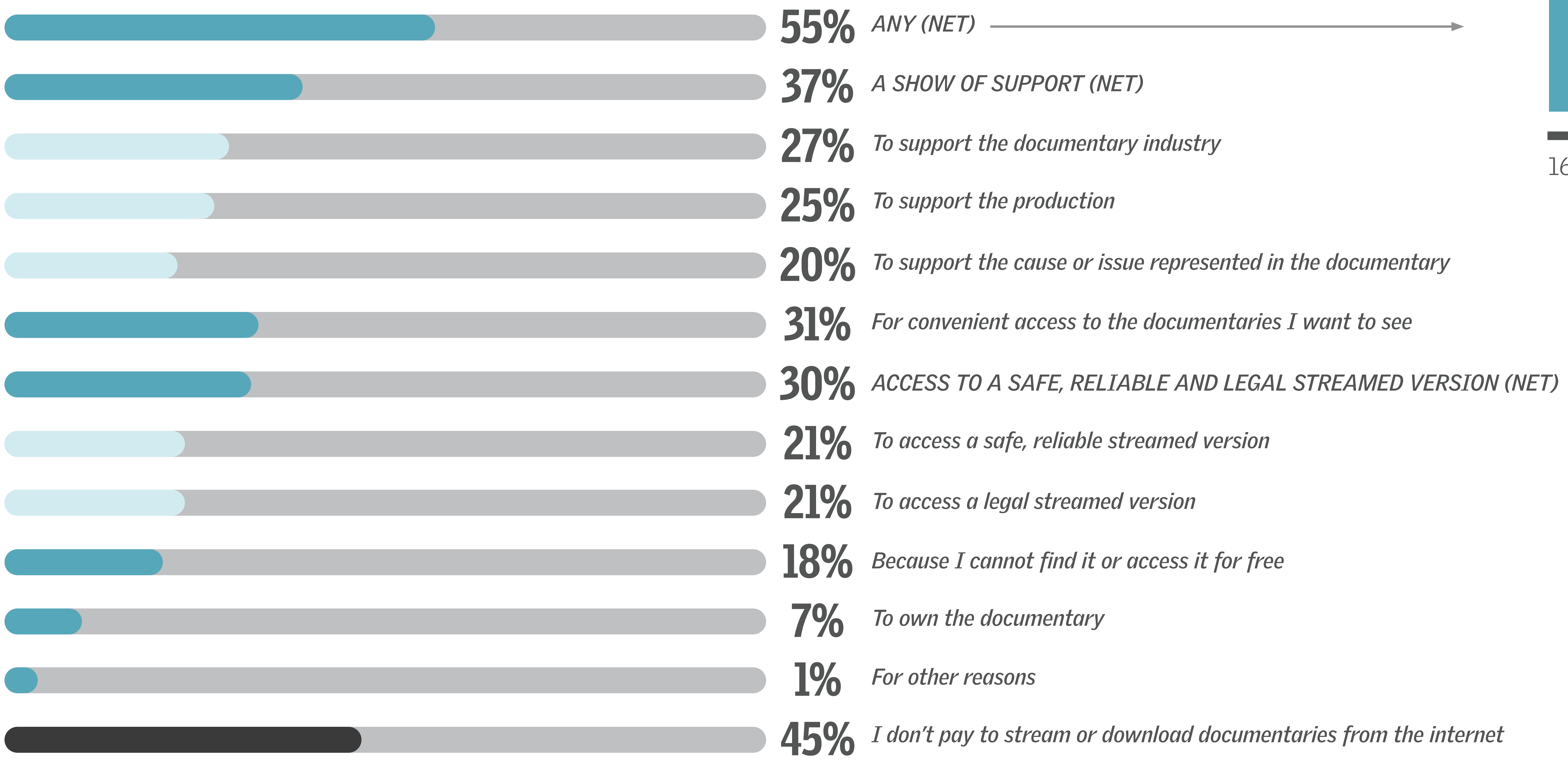
(Documentary watchers n=3586)

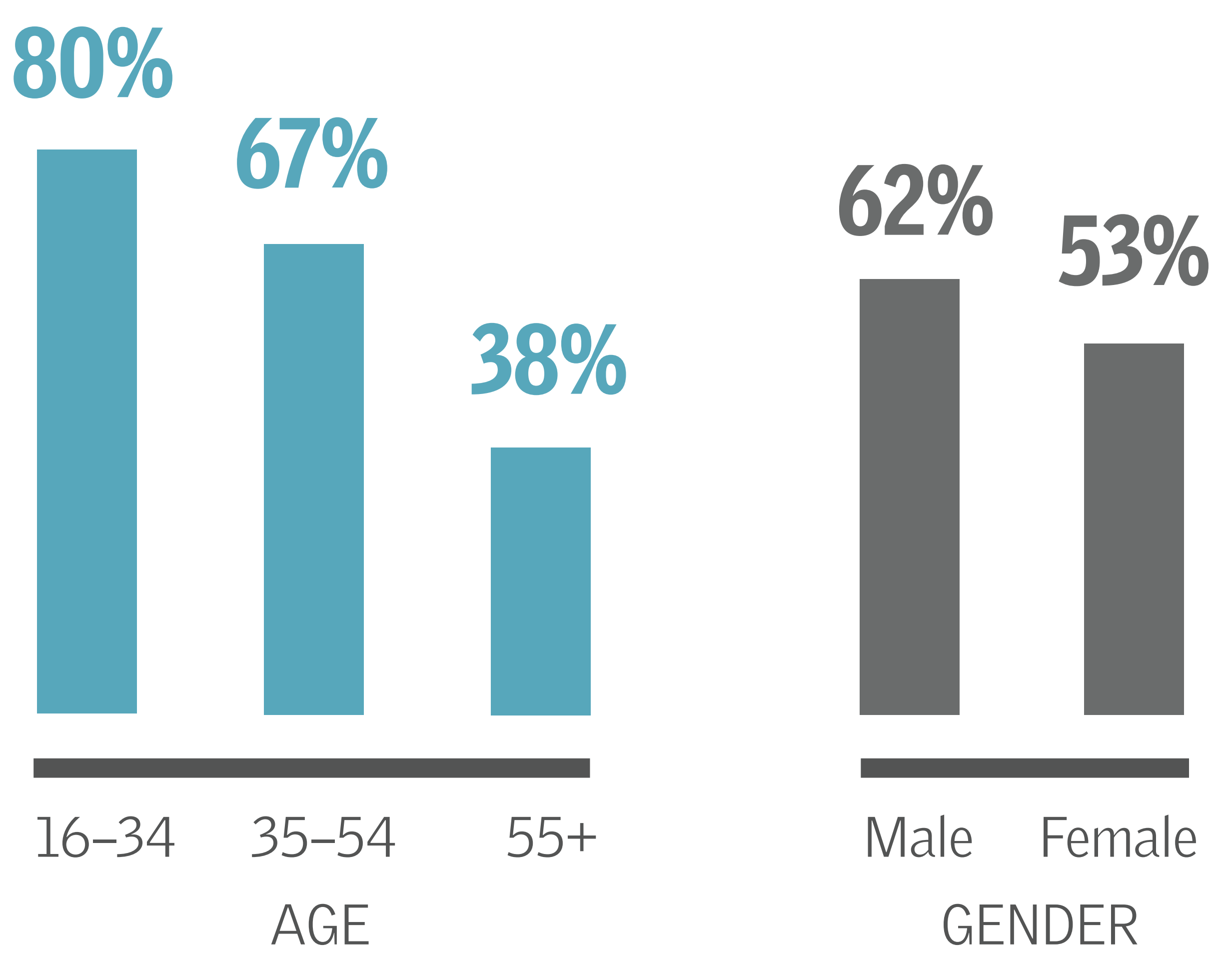
	PRICE RANGES									
	$0	$0.01 –$5.99	$6.00 –$10.99	LESS THAN $11	MORE THAN $11	$11.00 –$14.99	$15.00 –$19.99	$20.00 –$24.99	$25.00+	DON'T KNOW
A documentary at a theatre or festival	5%	5%	24%	35%	61%	37%	17%	5%	2%	5%
To rent a documentary	17%	54%	15%	86%	3%	2%	0%	0%	0%	11%
To buy a documentary	22%	11%	13%	46%	35%	12%	12%	8%	3%	19%
An online subscription for documentaries	18%	21%	25%	64%	15%	9%	3%	1%	2%	21%
A documentary on a cable or satellite service	32%	31%	12%	75%	5%	3%	1%	0%	1%	20%

TO PAY…

Just over half (55%) pay for documentaries they watch online (especially men and younger respondents 16–34,though this decreases steadily with age), **while nearly as many (45%) do not** (particularly women [47%] and those 55+ [62%]). Among those who do, **payment is usually made for one of three reasons: as a show of support, for convenient access, and/or for access to a safe, reliable, and legal streamed version of the documentary in question**.

Q13. "I PAY FOR DOCUMENTARIES THAT I WATCH ONLINE OR DOWNLOAD FROM THE INTERNET …"
(Documentary watchers n=3586)



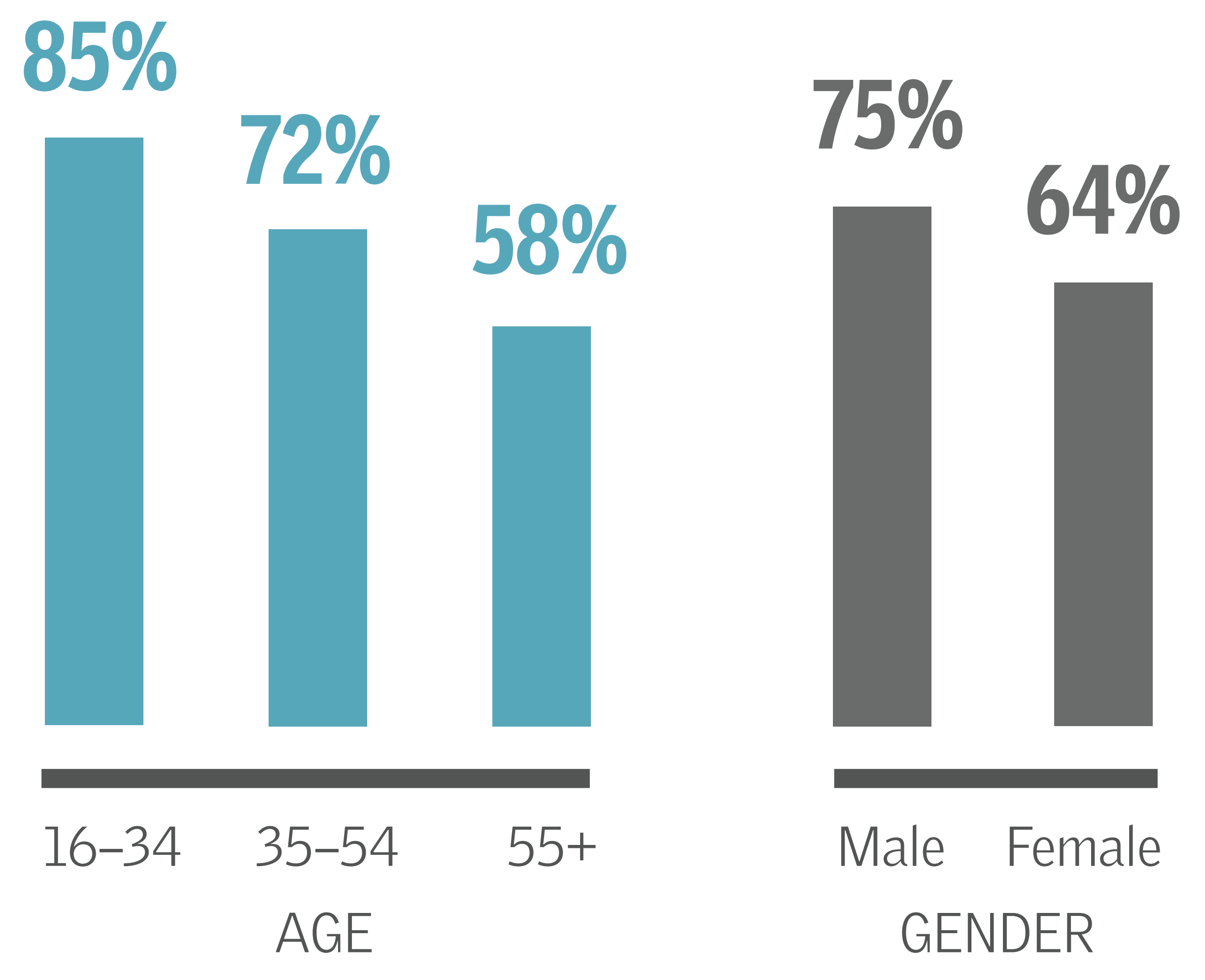


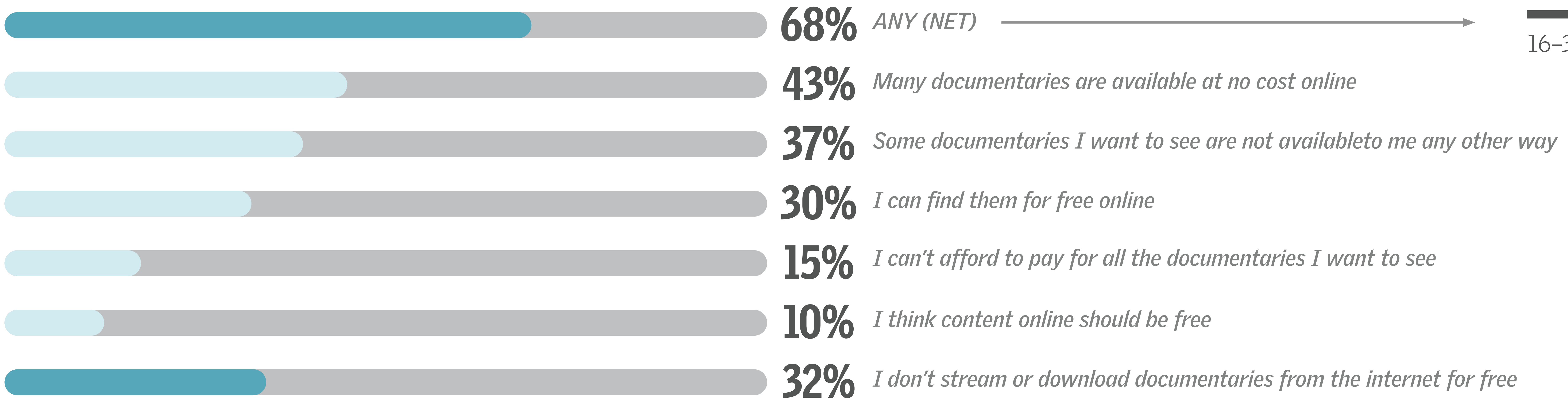
… OR NOT TO PAY.

Sixty-eight percent watch or download documentaries online for free (especially Quebecers [76% vs. 67% for the rest of the country]). Men and younger respondents 16-34 are also more likely to look for free downloads even while they are willing to pay (see previous slide), **while 32% do not watch for free** (particularly women [36%] and those 55+ [42%], and Quebecers are least likely [24%]). Why do so many documentary watchers not pay to watch docs? **It's mainly because such documentaries exist – sometimes exclusively – in this format.**

Interestingly, the older you get…the less you are likely to pay for docs.

Q12. "I WATCH DOCUMENTARIES ONLINE OR DOWNLOAD THEM FROM THE INTERNET FOR FREE BECAUSE…"
(Documentary watchers n=3586)





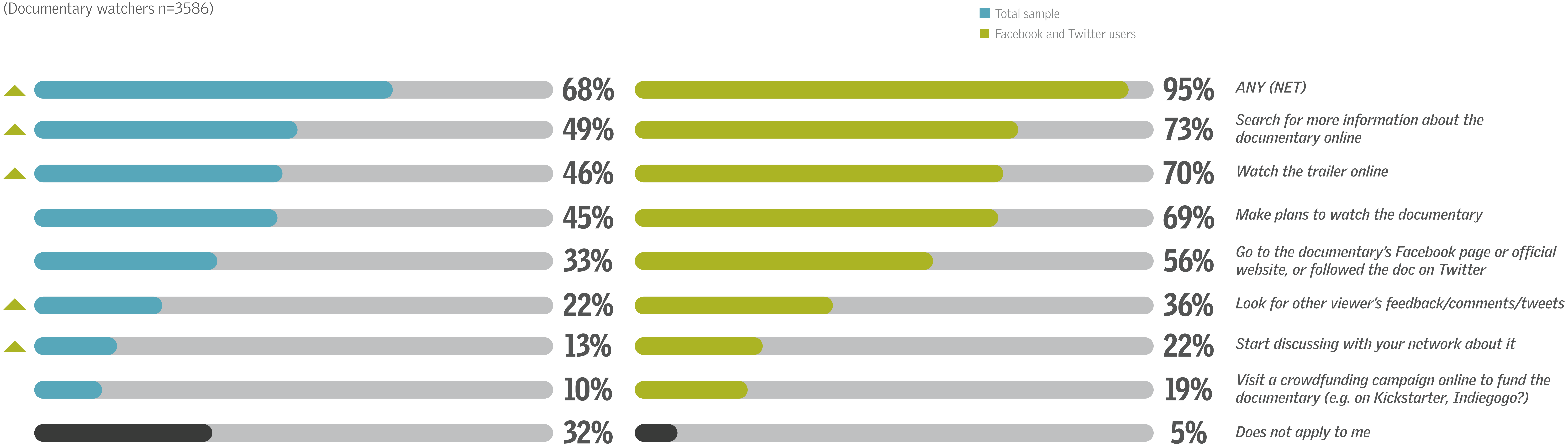
Social Media

SOCIAL SHARES INSPIRE MAKING PLANS TO WATCH DOCS.

After seeing friends sharing a newly released documentary on Facebook or Twitter, three-quarters (73%) of Facebook and Twitter users search for more information about the documentary online, while 70% will watch the trailer online, and 69% will make plans to watch the documentary. Searching for more information about documentary online, watching the trailer online, looking for other viewers' feedback/comments/tweets, and discussions with their network are all more likely to happen in 2018 compared to four years ago, and younger respondents (age 16-34) are significantly more likely to do all of it.

Q22. WHEN YOU SEE SOME OF YOUR FRIENDS SHARING A NEWLY RELEASED DOCUMENTARY ON FACEBOOK OR TWITTER, HAVE YOU EVER DONE ANY OF THE FOLLOWING?

(Documentary watchers n=3586)

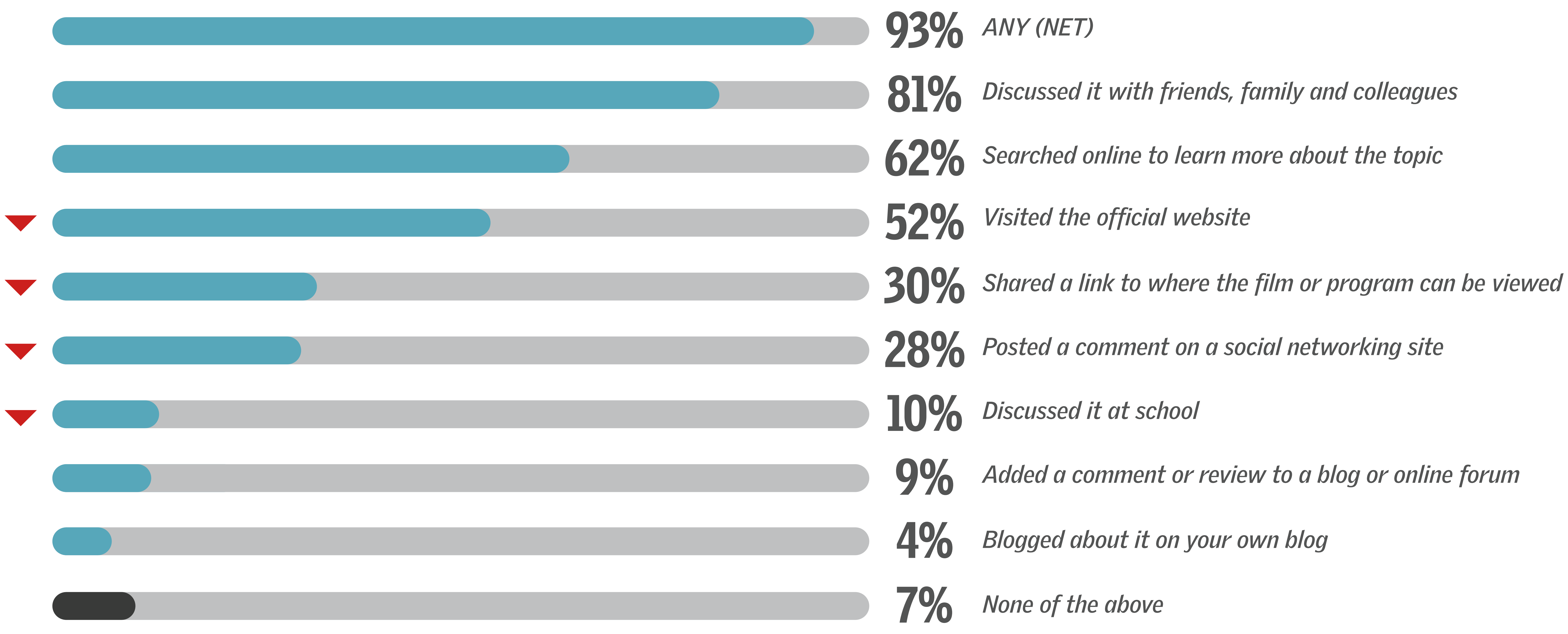


NEARLY ALL HAVE DISCUSSED A DOCUMENTARY THEY'VE WATCHED IN SOME CAPACITY, ESPECIALLY MILLENNIALS.

Nearly all (93%) have discussed a documentary they've watched in some capacity, with 81% having discussed it with friends, family, and/or colleagues, and 62% saying they've searched online to learn more about the documentary topic. Actions like visiting the official website, sharing a link to where the film or program can be viewed, posting a comment on a social networking site, and discussions at school, were less likely to happen this year (vs. 2014). However, as indicated on the previous page, respondents are more likely in 2018 to search out more information based on what they have seen from friends who have shared on either Facebook or Twitter. Unsurprisingly, younger respondents (16-34) and females are more likely to watch a documentary and then discuss it with one of the actions mentioned below.

Q23. AFTER WATCHING A DOCUMENTARY, HAVE YOU EVER ...?

(Documentary watchers n=3586)



Conclusion

Continuing our conversation with documentary audiences helped Hot Docs and the documentary industry better understand (a) the changes audiences faced in the documentary marketplace, and (b) how they are reacting to these changes. By launching the *Documentary Audience Research* in 2018, we are now able to expand on the story our doc film customers
told us in 2014.

Documentary viewership remains strong but the way viewers are consuming the content is changing. It's easier to find documentary content compared to even just a few years ago. Netflix dominates as both a means of discovery for viewers of documentaries, and as a key platform for viewing, especially since Canadians not only enjoy watching documentaries from the comfort of their own homes, but prefer the instant availability that online documentaries offer them.

Documentary viewers are open to new documentary opportunities, and the availability of documentaries on Netflix is helping drive that growth. In fact, when over half sit down to watch a documentary, they have no idea what they are going to watch and will browse for new content. Beyond Netflix, the increase in platforms, and the growth in the number of documentaries available on YouTube, have provided the viewer with many viewing opportunities.

In general, documentary audiences are saying they are viewing more documentaries than they have done previously, and are open to both paid and free viewing opportunities. Remarkably, 91% would watch *even more* docs if the right conditions were met. That makes it essential for a production team to market, promote, and publicize documentaries to audiences in more ways and via more channels. Trailers prove to be one of the most successful ways to drive audiences to choose to watch a doc. Of course, these trailers need to be accessible to audiences especially, via YouTube and the filmmakers' own website.

Social media continues to be a source of documentary exposure for viewers. Beyond recommendations from friends, family, and followers, documentary viewers are continuing the discussion of documentaries and documentary topics over these channels. This level of engagement is good for the prospects of documentaries in Canada.

It is important to market and promote films as much as possible to increase their visibility to Canadian documentary viewers. There is no need to reinvent the wheel to get the message out about documentaries; marketing and publicity channels for narrative films work well. Our audiences want docs to be treated and perceived like fiction films, so they can find out about them and watch them more easily. In contrast to 2014's findings, filmmakers do not need to have their docs on every single platform; they just need to better communicate to their audience where their films are (or will be) available. Documentary viewers are a receptive audience, and they're looking for more opportunities to view docs – especially Canadian ones.

All of these insights reinforce the fact that the film's release, premiere, distribution strategy, and marketing plan are just as important in the life of the film as the production of the film itself. Filmmakers, producers, and our doc industry community who employ these tools and strategies will find enthusiastic, receptive, and passionate audiences ready to enjoy their docs.

SUPPORTING LITERATURE

1. How Documentaries Became the Hottest Genre of the Summer (Stephanie Zacharek, Time, August 23, 2018) ; Stranger Than Fiction: How Documentaries Invaded The Zeitgeist (Matthew Jacobs, Huffington Post, July 13, 2018)
2. Reel to real: can documentaries change the world? (Ellen E Jones, The Guardian, October 6, 2011); Documentaries Don't Change the World (Ani Mercedes, Medium, July 19, 2017)