

How Canadians View the Contributions of Global Studios & Defining Canadian Content

On behalf of the Motion Picture Association – Canada, Bruce Anderson (formerly Chairman of Abacus Data, currently Partner, spark*advocacy) has conducted several public opinion studies over recent years, including a major survey of 2500 adults in December 2024. This report is intended to describe the most recent results as well as to bring forward relevant data points from earlier studies.

Defining “Canadian content”: What Canadians Value

Canadians are proud of Canadian content and want to see these productions supported, but they also feel the definition of what should be considered “Canadian content” is dated and should be broadened.

Roughly three in four (73%) say the definition of “Canadian” should take into account economic benefits and worker opportunities. *(December 2024, 2500 adults, Spark Insights nationwide survey)*

When provided with a list of possible criteria that should be taken into account when considering what is Canadian and the obligations on streaming companies, ownership was not considered more important than many other factors, such as hiring Canadians, showcasing Canada to the world, and buying locally. *(December 2024, 2500 adults, Spark Insights nationwide survey)*

The large majority (79%) believe that the policy which stipulates that a movie or TV show that has more than 90% Canadian cast and crew can be considered not Canadian unless owned by a Canadian production company should be changed. *(February 2020, 1500 adults, Spark Insights)*



The role of ownership

Over different surveys we have explored how people feel about the current way in which Canadian content has been defined. In every instance the results indicate Canadians feel that “ownership” should not play an overarching role.

The large majority (79%) believe the policy which stipulates a movie or TV show that has more than 90% Canadian cast and crew is considered not Canadian unless owned by a Canadian production company should be changed. *(February 2020, 1500 adults nationwide, Spark Insights)*

By a 3:1 margin (76%-24%), people reject the idea that to be valuable to Canada a film or series must be owned by a domestic production company. *(August 2023, 3000 adults nationwide, Spark Insights)*

71 Bank St., Suite 6
Ottawa, Ontario, Canada
K1P 5N2

 sparkadvocacy.ca
 [@spark_advocacy](https://twitter.com/spark_advocacy)

Bruce Anderson
bruce@sparkadvocacy.ca
+1 (613) 882-0929

By a roughly 3:1 ratio (73%-27%), Canadians think the priority for public policy should be on having more films/series shot in Canada, using Canadian talent, and exposed to global audiences, rather than more films and series owned by Canadian production companies. *(August 2023, 3000 adults nationwide, Spark Insights)*

When it comes to the approach of public policy, only 18% think the priority should be to back projects of Canadian production companies. Most (62%) say whether a project is backed by a Canadian or global Hollywood studio should matter less in federal policy terms than the opportunities for working Canadians. And 20% say preference should be placed on attracting Global studio projects. *(February 2022, 1500 adults nationwide, Abacus Data)*

When asked if the CRTC should continue to require Canadian ownership for a production to be considered Canadian or broaden the definition, two-thirds (67%) feel the definition should be broadened. *(December 2024, 2500 adults, Spark Insights nationwide survey)*

Contributions of Streaming Companies

The large majority of Canadians believe that global Hollywood studios make meaningful contributions to Canadian cultural and economic goals, including *(February 2020, 1500 adults nationwide, Spark Insights)* by:

- Sharing stories about Canada and Canadians around the world (93% say this is helpful or good for Canada)
- Hiring a wide range of Canadian talent behind the cameras (94%)
- Building creative excellence in Canada through skills development and training initiatives (94%)
- Expanding filmmaking capacity in Canada by investing in new infrastructure such as studio space or innovative technologies (93%)
- Creating jobs and buying from businesses in Canadian places where shows and films are made (95%)

Fully 87% believe it is valuable for Canada when streaming companies make movies and series here and show them to global audiences. *(December 2024, 2500 adults, Spark Insights nationwide survey)*

A large majority (78%) say Canada should make it attractive for streaming services to make movies and series in Canada, employing Canadians. *(December 2024, 2500 adults, Spark Insights nationwide survey)*

Regulation of Streaming Services

Canadians favour a freer market regarding content production in Canada, with 79% stating they prefer “limiting government regulation to allow people to make their own decisions about what to watch and companies to make their own decisions about production”. *(December 2024, 2500 adults, Spark Insights nationwide survey)*

Most people believe the best way to help Canada's creative workers is to have streaming companies use their own expertise to develop projects with Canadian talent and market them globally rather than have them contribute to a federally mandated fund that chooses where the funds should go.

(August 2023, 3000 adults nationwide, Spark Insights)

A similar question from a 2022 survey saw a strong majority preference for global studios making their own choices about how to involve and showcase Canadians (71%). *(February 2022, 1500 adults nationwide, Abacus Data)*

Most people (62%) think streaming companies do more to promote content from Canada around the world, rather than crowding out international content with US content. This is the majority view across party lines, generations, and linguistic groups. *(August 2023, 3000 adults nationwide, Spark Insights)*

Almost three-quarters (72%) of Canadians say they watch international content on streaming services, higher than the amount who say they watch non-US content on broadcast networks (64%). *(August 2023, 3000 adults nationwide, Spark Insights)*

Most prefer (68%) that federal regulations be flexible to ensure that smaller niche services can thrive and make a unique contribution that is sensible given their size and business model. *(August 2023, 3000 adults nationwide, Spark Insights)*

There is a strong preference for policies that support Canadian content without affecting what is made available to consumers (72%) over policies that control what content is available in Canada in order to ensure Canadian products have higher profile. *(February 2022, 1500 adults nationwide, Abacus Data)*

Conclusions

In survey after survey, Canadians express significant appreciation for the production work that streaming services and global Hollywood studios do in Canada. People see both economic and cultural benefits and want policies that encourage more of these projects as a result.

Canadians believe the definition of Canadian content should not hinge on whether a film or show is owned by a Canadian production company – they prefer to see a broader set of benefits for Canadians used to frame policy in this area, including recognizing productions that hire locally, feature Canadian locations and use Canadian studios.

Canadians are skeptical of the argument that streaming services push American products at the expense of Canadian and international productions – more Canadians now say they watch international content on streaming services than on broadcast television.

If streaming companies are required to do more to contribute to Canadian goals, most believe this is best done by letting streamers pick the projects to invest in, based on their expertise. They believe that the contributions required should include the sorts of activities that streaming companies have routinely been undertaking as part of their work in Canada, and they feel the government's policy approach should be flexible to allow smaller streamer companies to continue to operate in Canada.

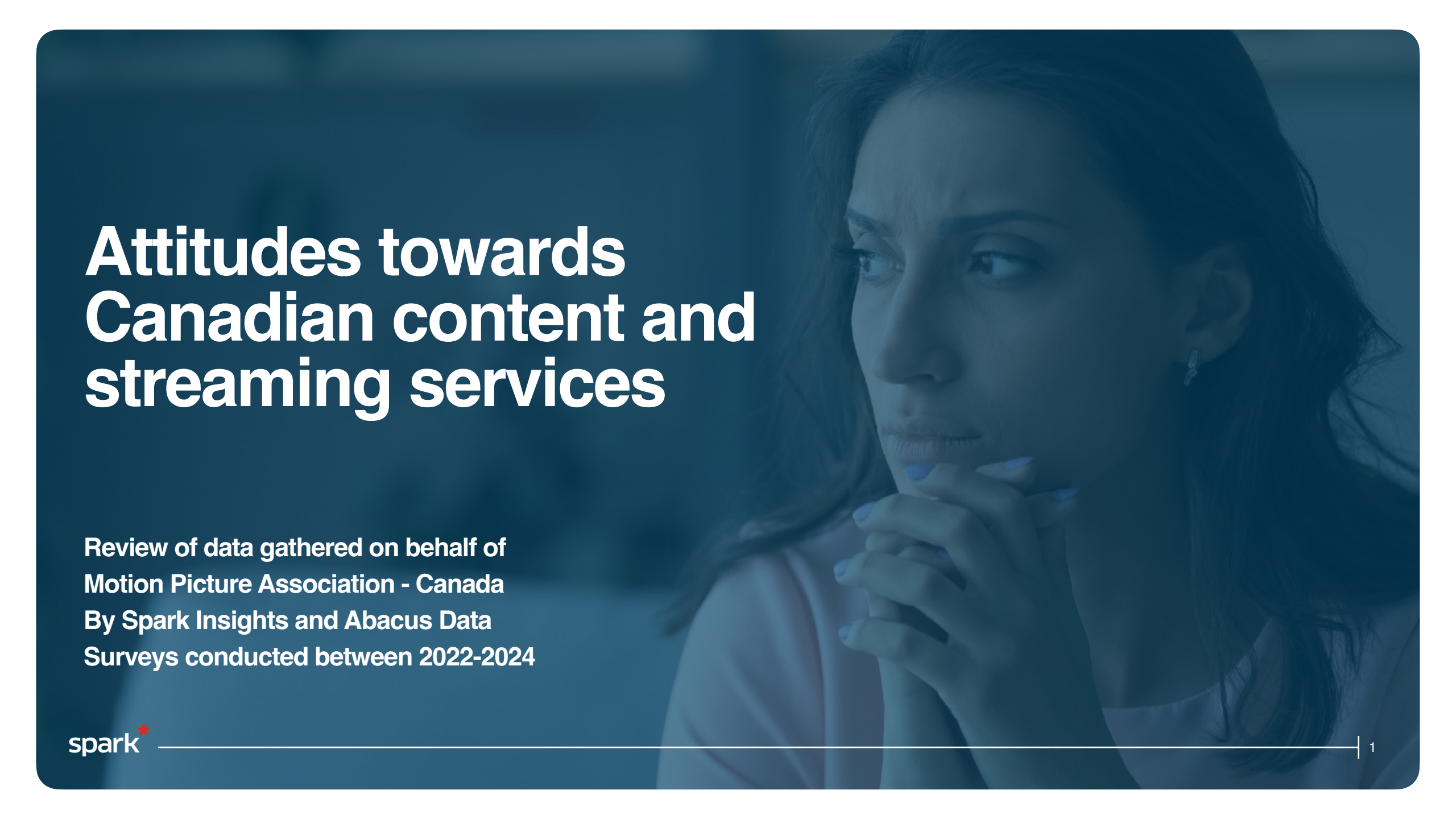
Canadians do not believe the definition of "Canadian content" should impinge upon consumers having the choice to choose the content they want to watch.

Sources:

August 2023 – Spark Insights - "How Canadians see contributions to Canada in the film and TV sector" - https://www.mpa-canada.org/wp-content/uploads/2023/11/MPA-Canada-Survey_Fall-2023_Public_ENG.pdf

February 2022 – Abacus Data - "Contributing to Canadian Success in Film and TV" - <https://www.mpa-canada.org/wp-content/uploads/2023/07/Abacus-Final-2022.pdf>

January 2021 – Abacus Data - "Canadians Keen to See More Investment in Film & TV Production in Canada, Welcome Global Hollywood Studio Projects" - https://www.mpa-canada.org/wp-content/uploads/2024/11/ENG_LongVersion_Abacus-Film-and-TV-Investment-in-Canada-.pdf

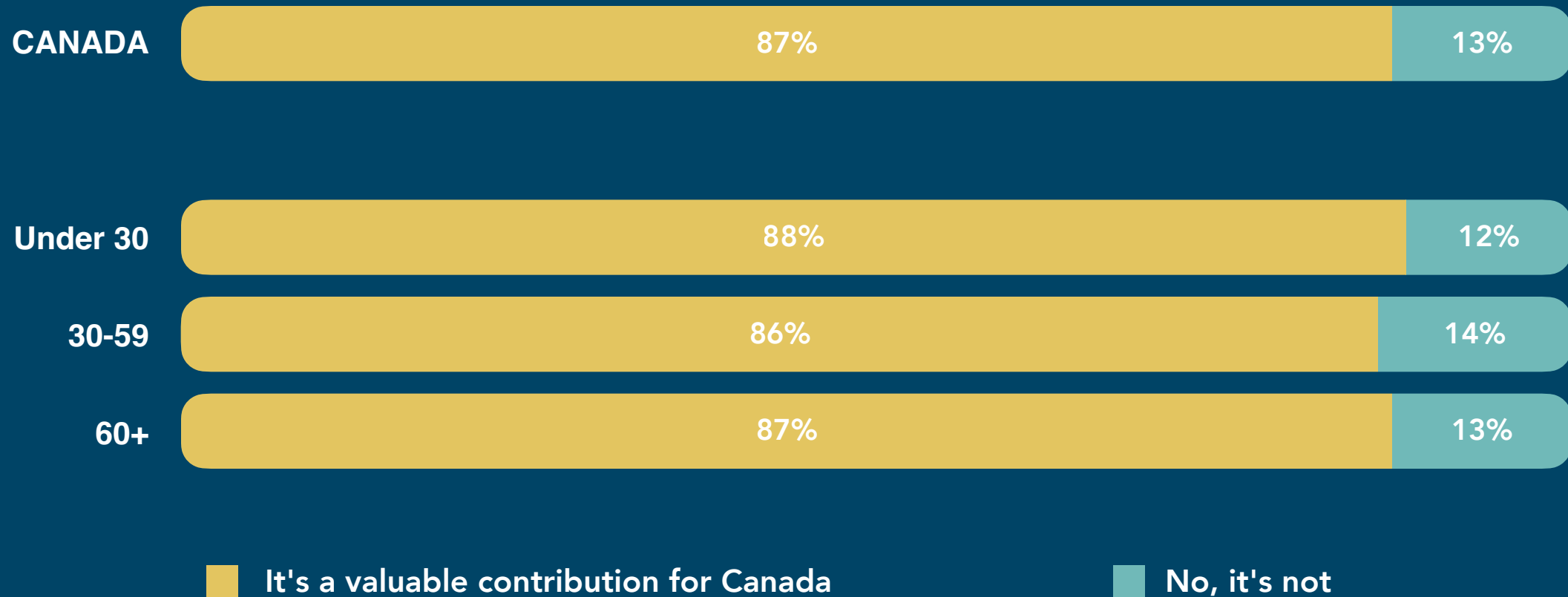


Attitudes towards Canadian content and streaming services

Review of data gathered on behalf of
Motion Picture Association - Canada
By Spark Insights and Abacus Data
Surveys conducted between 2022-2024

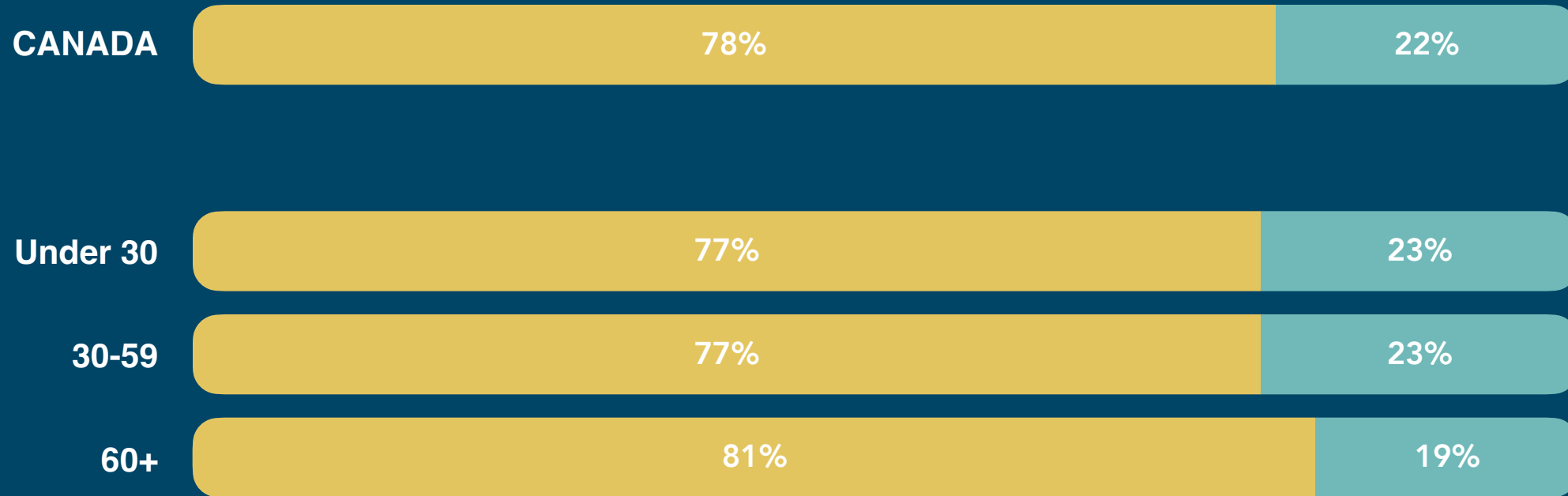
Is it valuable for Canada when streaming services make movies and shows here and show them to global audiences?



Do you believe it is a valuable contribution to Canada and to the career opportunities for Canadian film and TV workers, when streaming services like Netflix, Disney +, Paramount +, Amazon Prime Video, and others produce films and series in Canada and make them available to global audiences?



Should Canada make it attractive for streaming services to make movies and series here employing Canadians?

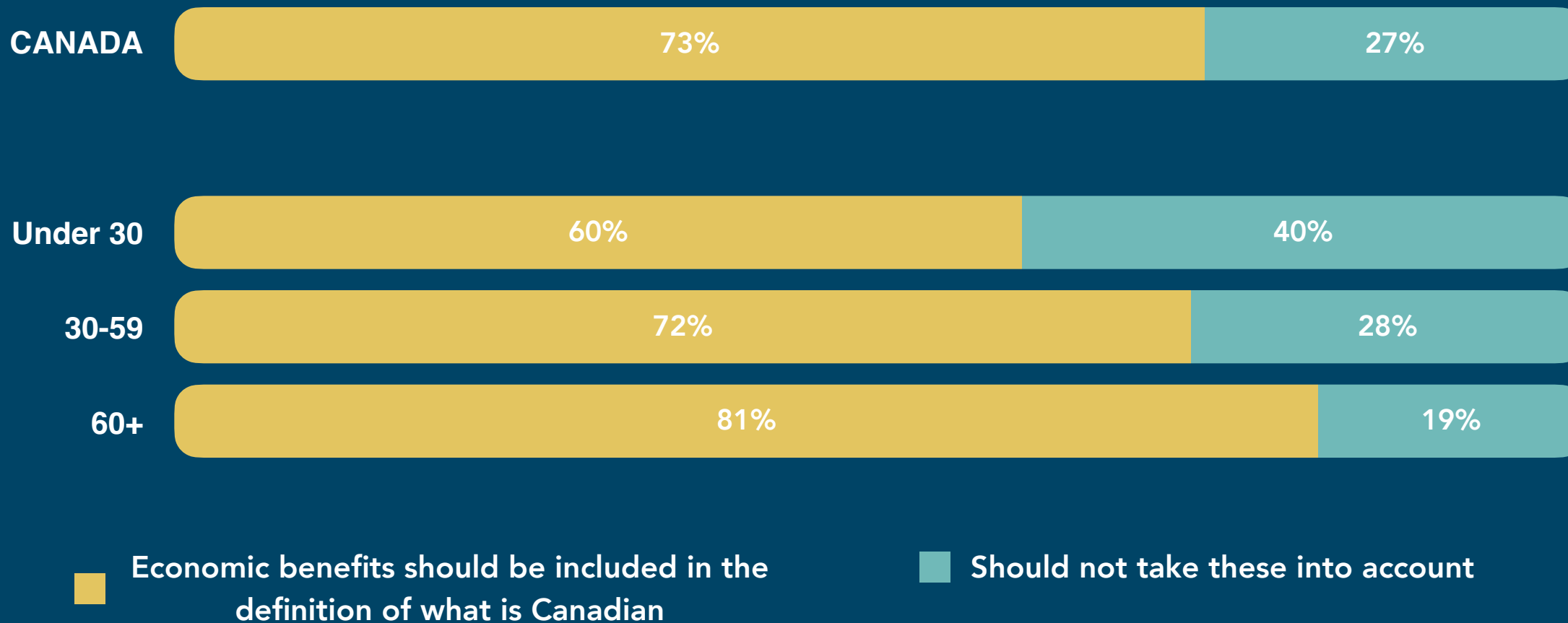
In terms of the federal government policy you would like to see for the future, which of these two approaches would you prefer



 Federal policy should make it attractive for streaming services to make series and movies here  Should not

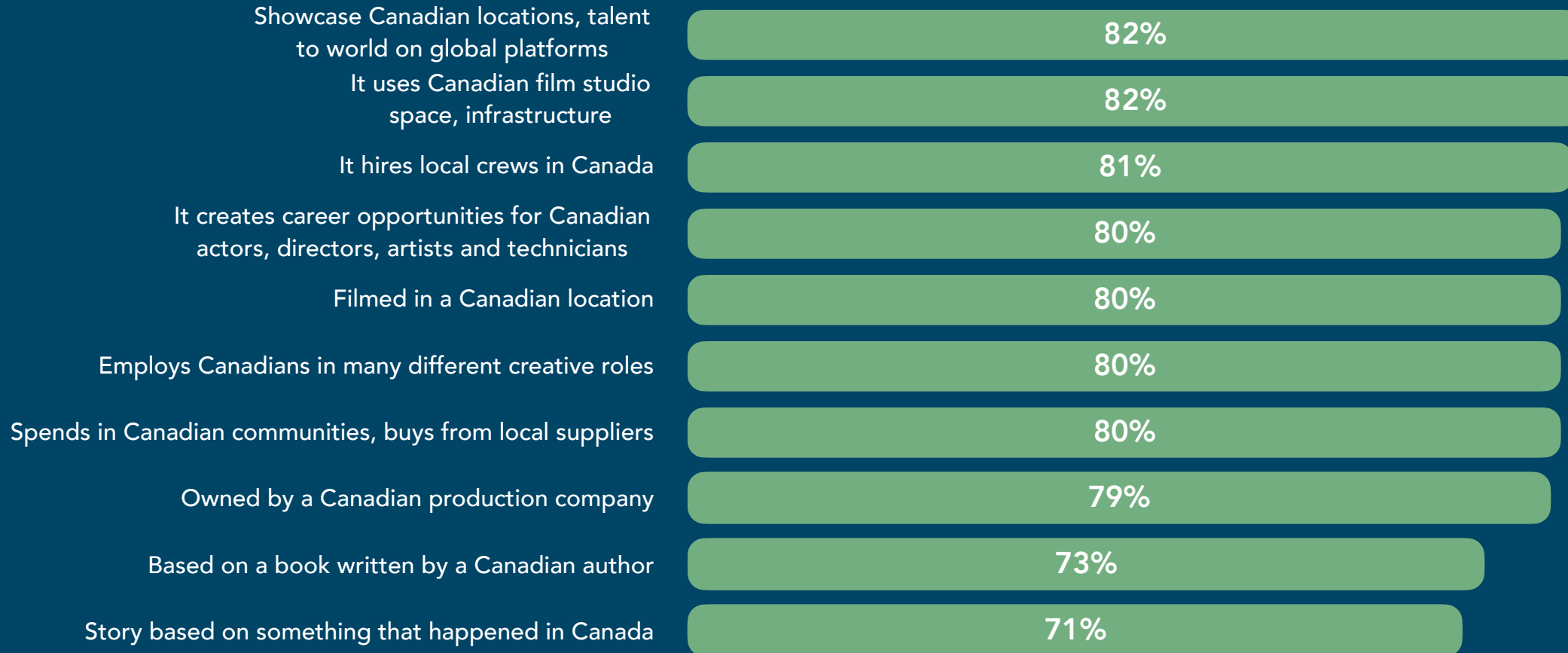
Should the definition of “Canadian” take into account economic benefits and worker opportunities?

Should the definition of what is Canadian include whether a production creates significant economic benefits and opportunities for Canadian film and TV workers, or should federal policy not take those things into account?



What should be considered Canadian?

Should a film or TV series made by a global streaming service be considered Canadian if...



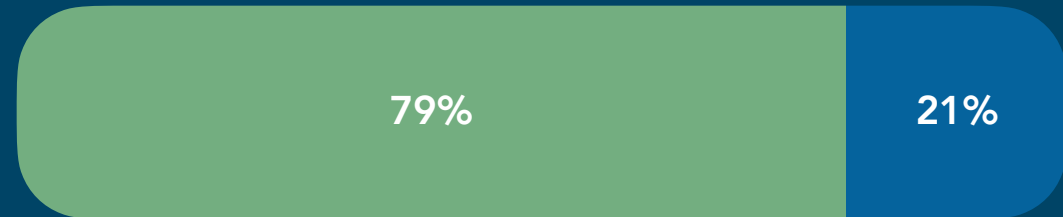
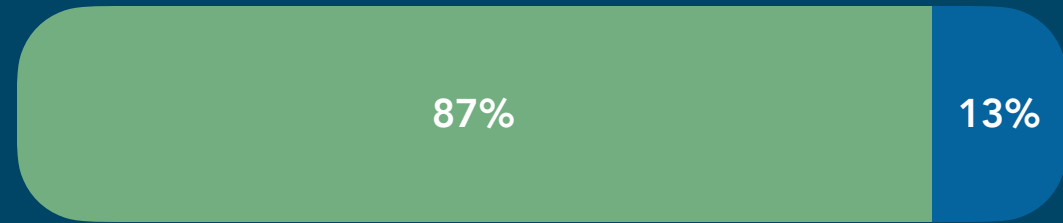
Should be considered Canadian

Feelings surrounding these issues

Canada is home to many creative people who can gain great experience by working on projects with global Hollywood streaming studios.

I'd rather see as little government rules and regulations in this sector as possible, let people choose what they want to watch, and let companies make what they prefer to make.

■ Agree ■ Disagree

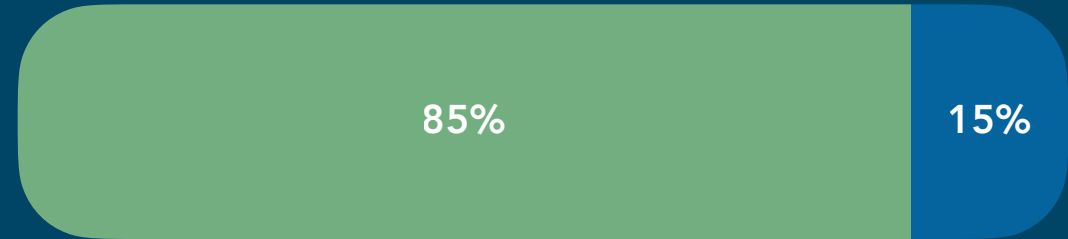
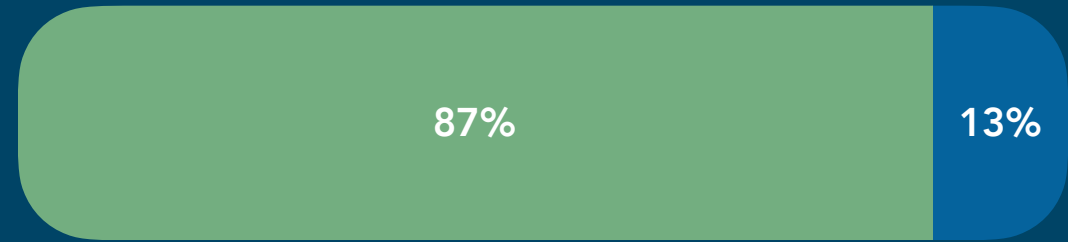


Feelings surrounding these issues

Especially given the trade questions surrounding Canada US relationship it is important to try to attract global studio investment to Canada, not make it harder to do that.

Canada has a competitive strength in making films and shows and every effort should be made to hold onto and strengthen that competitive advantage.

■ Agree ■ Disagree

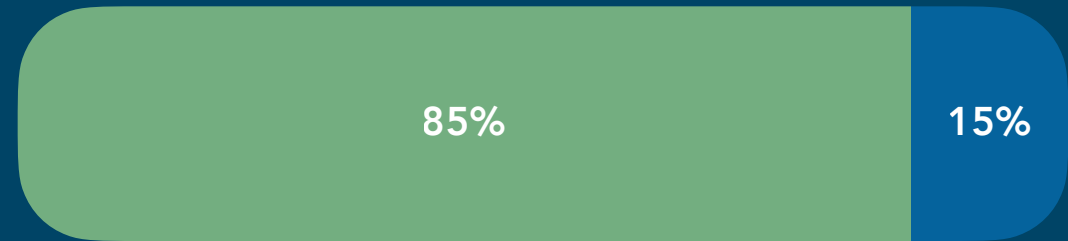
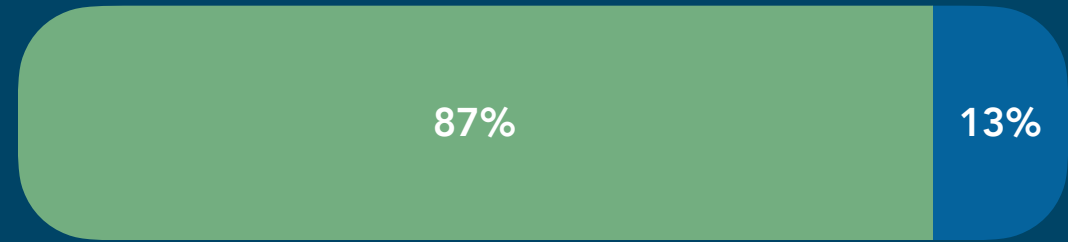


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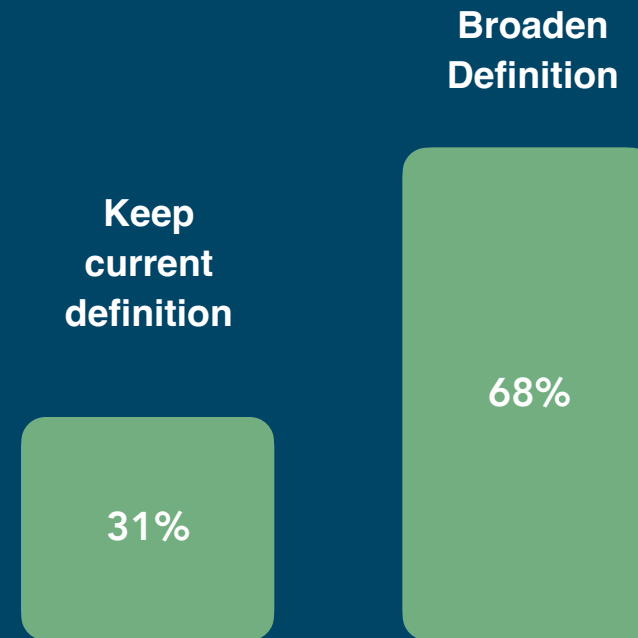
■ Agree ■ Disagree



Should CRTC take a new approach?

The old CRTC rules use narrow criteria and require that a TV show or movie is owned by a Canadian production company to be considered Canadian.

Would it be better if...the CRTC continues to use that narrow definition of what is Canadian or includes a broader list of criteria, including the items listed above, when deciding on the obligations of streaming services?



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



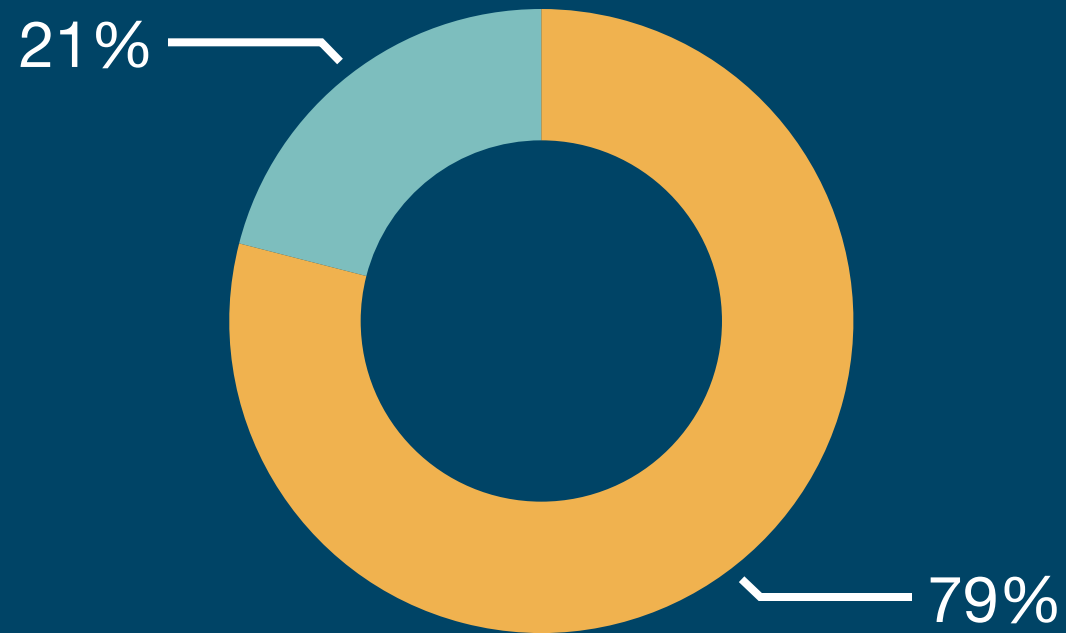
- MORE FILMS/SERIES FEATURING CDN LOCATIONS/STORIES/TALENT SHOWN GLOBALLY
- MORE FILMS/SERIES OWNED BY CDN PRODUCTION COMPANIES

CAN A PROJECT BE VALUABLE TO CANADA WITHOUT CANADIAN OWNERS?



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

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



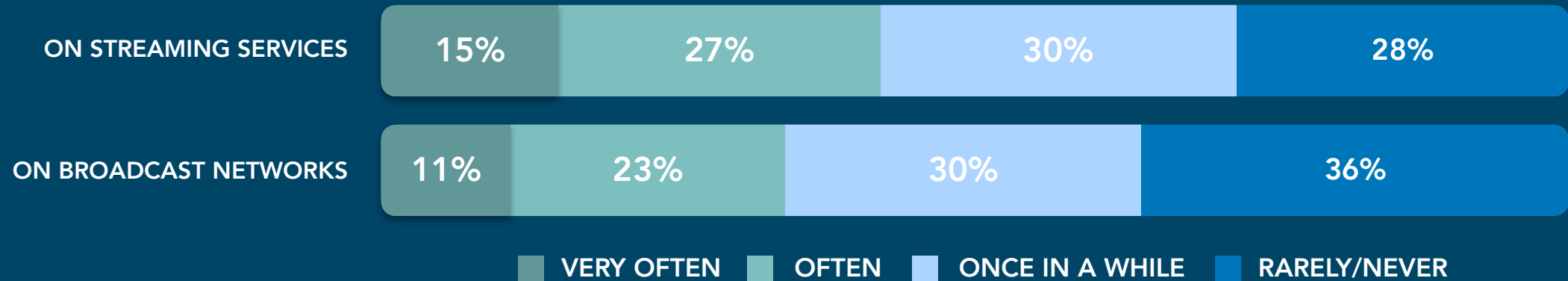
- USE THEIR EXPERTISE TO DEVELOP PROJECTS WITH CREATIVE CDN TALENT AND MARKET THESE GLOBALLY
- PAY INTO A FUND MANDATED BY FED GOV'T AND LET THE FUND MANAGERS CHOOSE HOW TO SPEND

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



- STREAMING SERVICES EXPOSE PEOPLE TO CONTENT FROM**
- **AROUND THE WORLD, INCLUDING CANADA, GIVING CREATORS MORE OPPORTUNITY**
 - **PROMOTE SO MUCH AMERICAN CONTENT IT CROWDS OUT CONTENT FROM ELSEWHERE, MAKING IT HARDER FOR CREATORS FROM OTHER PLACES**

HOW OFTEN DO YOU WATCH CONTENT FROM ANOTHER COUNTRY OTHER THAN THE US?



WHICH IS THE BETTER BENEFIT FOR CANADA

IF GLOBAL STUDIOS PUT MONEY INTO A FUND THAT IS THEN GIVEN TO CANADIAN PRODUCERS TO MAKE SHOWS AND FILMS

29%

IF GLOBAL STUDIOS MAKE SHOWS AND FILMS IN CANADIAN LOCATIONS INVOLVING LOTS OF CANADIAN FILM AND TV WORKERS AVAILABLE TO THE WORLD VIA STREAMING PLATFORMS

71%

PREFERENCES FOR PUBLIC POLICY

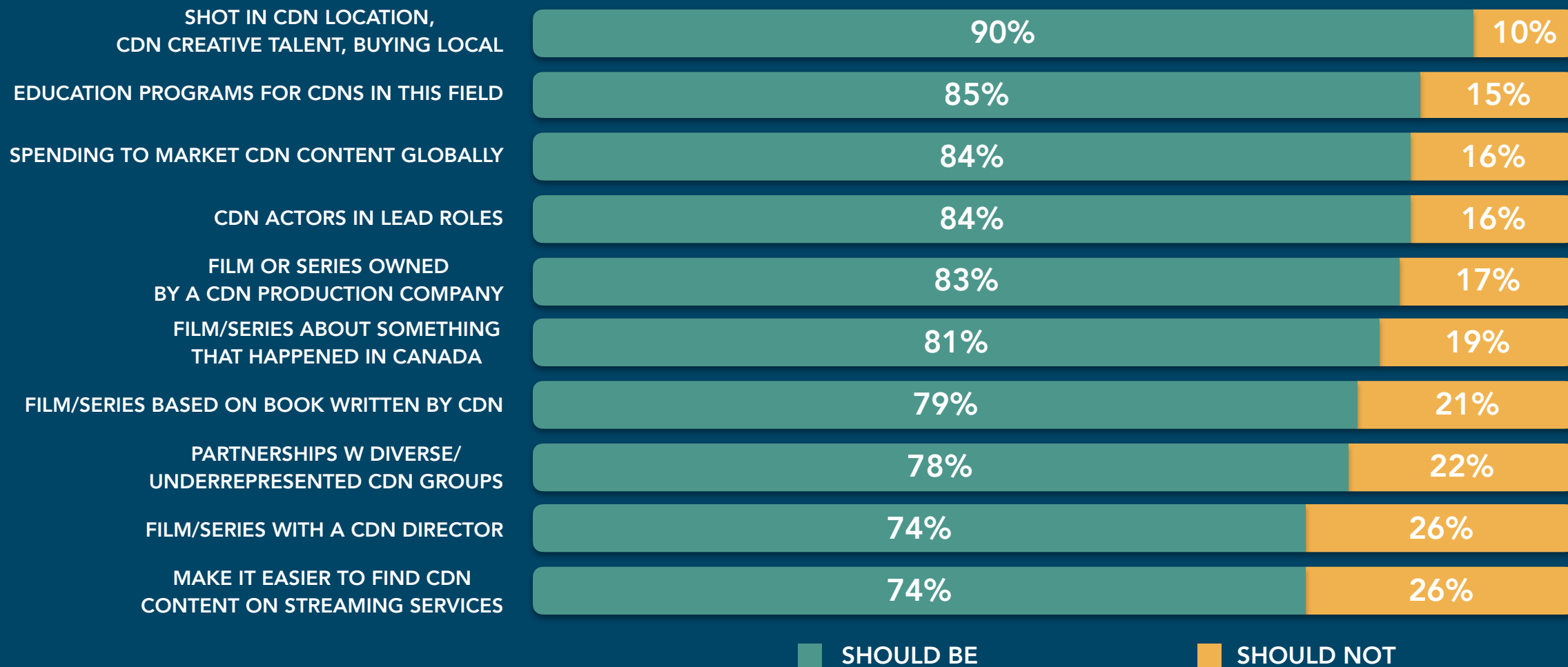
HAVE THE GOVERNMENT SET RULES ABOUT WHAT SHOWS AND FILMS STREAMING SERVICES MAKE AVAILABLE IN CANADA TO AS TO MAKE SURE THERE IS ENOUGH CANADIAN CONTENT

28%

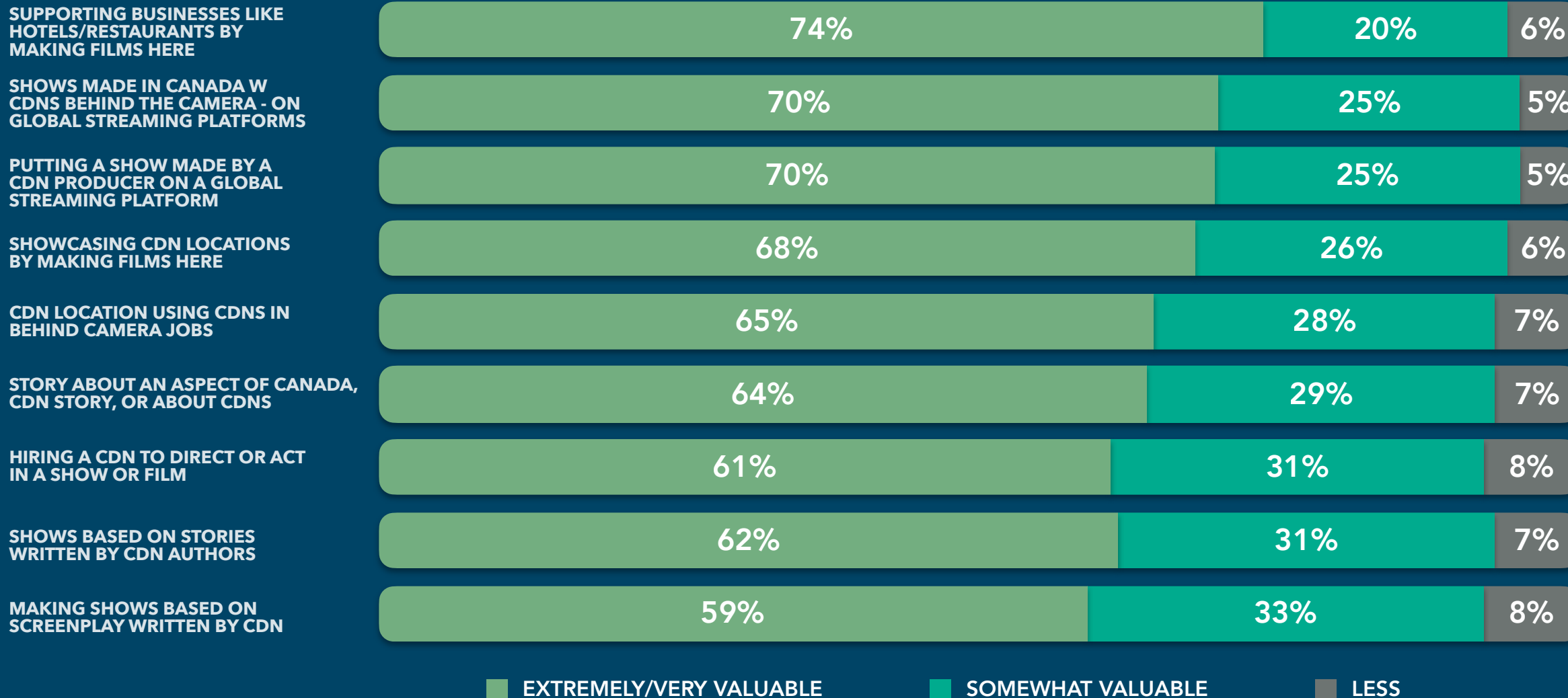
REQUIRE STREAMING SERVICES TO SUPPORT CANADIAN CREATIVE TALENT BUT IN WAYS THAT DO NOT AFFECT WHAT IS AVAILABLE TO CANADIAN CONSUMERS

72%

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



HOW VALUABLE IS EACH OF THE FOLLOWING FOR CANADA



EXTREMELY/VERY VALUABLE
 SOMEWHAT VALUABLE
 LESS

Should national policy favour film and TV projects ...

