

TELEFILM CANADA

Study on the audiovisual content viewing habits of Canadians in 2014

June 2014



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**Context, objectives
and methodology**

Context



- Telefilm Canada is a federal agency dedicated to the cultural, commercial and industrial success of the Canadian audiovisual industry. Through its various funding and promotion programs, Telefilm supports dynamic companies and creative talent here at home and around the world.
- In the context of Telefilm Canada's corporate plan, the agency wanted to have a third nationwide survey (the first was conducted in the spring of 2012)¹ carried out to gain an even better understanding of Canadians with respect to audiovisual products.
- To this end, Ad Hoc Research was commissioned to conduct a second web survey of the Canadian population.

- The specific objectives of this study are to:

- Learn more about and better understand the movie-watching (feature films) habits of Canadians
- Find out about their series-watching habits
- Identify and take stock of new emerging trends, particularly with regards to platforms and viewing modes
- Measure the perceptions and expectations of Canadians with regards to the film industry as well as their general knowledge of the country of origin of certain films

Objectives



1. The first survey conducted in 2012 was carried out using a very different questionnaire than the ones used in 2013 and 2014. For this reason, only the data from the last two years was used for comparison purposes in this document.

Context, objectives and methodology

Study population

- Canadians from all provinces
- Age 15 and over
- Able to speak French or English

Collection method

- Survey conducted using a web panel from March 25 to March 31, 2014
- Data was collected using the panel managed by Research Now, a regular partner of Ad Hoc Research.

Accuracy of results

- For a probability sample of $n = 3078$, the maximum margin of error at a confidence level of 95% is $\pm 1.77\%$.

However, the sample for this survey cannot be considered a probability sample because it was drawn from a web panel consisting of people who volunteered to take online surveys.



The Marketing Research and Intelligence Association (MRIA) recommends against calculating the margin of error when a nonprobability sample is used. For this reason, margins of error and significant differences presented in this document are for information purposes only.

Breakdown of interviews by region

| | <u>Total sample</u> | <u>Quebec</u> | <u>Ontario</u> | <u>Western Canada</u> | <u>Atlantic Canada</u> |
|-----------------------|---------------------|---------------|----------------|-----------------------|------------------------|
| Number of respondents | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |

- The results have been weighted by region, age and gender to reflect the study population as closely as possible.



Other clarifications

- In this document, the two arrows (↑ and ↓) serve to indicate **significant differences** – either upward or downward – **compared to the last survey (2013)**, as well as **among the various segments** (at a confidence level of 95 % or more).
- The average audiovisual content viewing frequencies are given in this document in the “n times per year” format. The figures are approximate data based on the average of the following extrapolations:
 - Never = 0 times/year
 - Once or twice a year = 2 times/year
 - Approximately once every 4-5 months = 3 times/year
 - Approximately once every 2-3 months = 5 times/year
 - Approximately once a month = 12 times/year
 - Approximately once every 2-3 weeks = 30 times/year
 - Approximately once a week = 52 times/year
 - Several times a week = 200 times/year
 - Every or almost every day = 300 times/year
- Due to the special nature of the film industry in Canada, the sample was segmented into two distinct subgroups: one composed of French-speaking Quebecers and the other composed of respondents from the rest of Canada, including English-speaking Quebecers who are essentially exposed to English-language content only.
- To make reading results easier, the first segment is called “**French-speaking Quebecers**” and the second segment is “**English-speaking Canadians.**”
- Please note that the results in this report are presented first by **region** with a column for comparing “**Total 2013**” with “**Total 2014**” and then by **age** and **language/region** (French-speaking Quebecers vs. English-speaking Quebecers and rest of Canada).



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Summary of results

Summary of results

- The goal of Telefilm Canada in commissioning this study for a third consecutive year is to understand the viewing habits of Canadians with regards to feature films and series as well as their perceptions of the film industry.
- Keeping this in mind, the study aimed to answer the following four key questions:

1

What are the **viewing habits of Canadians with regards to feature films** and what are the **latest trends** emerging in this industry?

2

What are the **viewing habits of Canadians with regards to TV series** and what are the **latest trends** emerging in this industry?

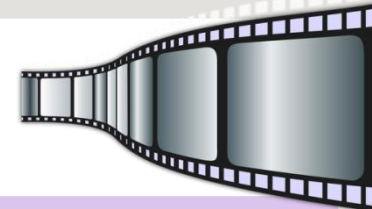
3

What do **Canadians like** and **prefer** when it comes to feature films?

4

What do Canadians **know** about the movie business and how do **they perceive the Canadian film industry**?

- The following pages summarize the most common answers given to these key questions.



1 What are the viewing habits of Canadians with regards to feature films and what are the latest trends emerging in this industry?

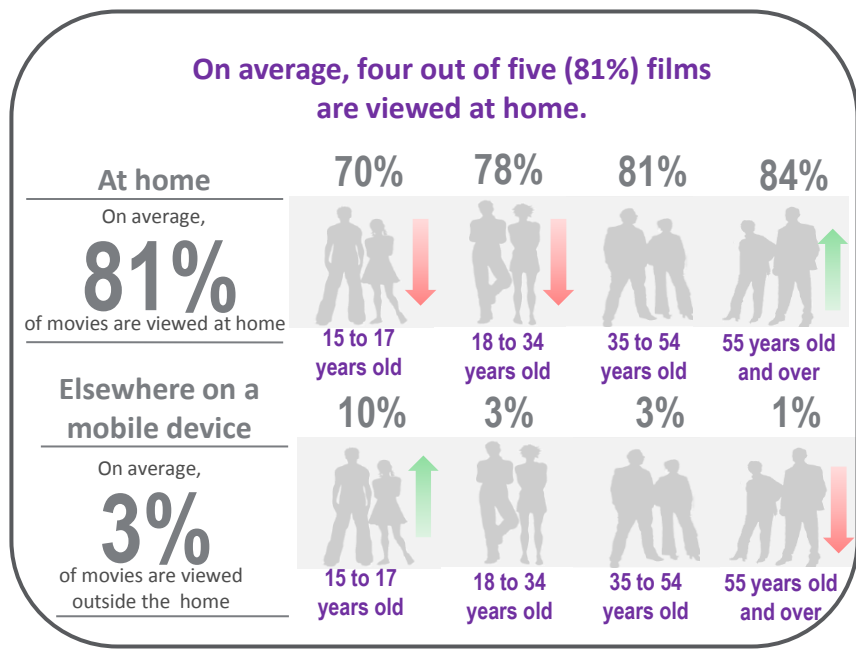
- More than half (51%) of the Canadians surveyed report **still watching feature films on a regular basis** (once per week or more).
- However, the survey shows a **slight decrease** in the average annual consumption frequency of movies compared to last year. Respondents state they now watch movies an average of 76 times per year (compared to 85 times per year in 2013).
- Two subgroups definitely stand out when it comes to watching movies:

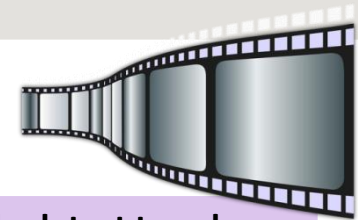


- With an average consumption frequency of 84 times per year, **French-speaking Quebecers consume more films** than English-speaking Canadians again this year.
- **Men also tend to watch movies more frequently** than women (82 times per year compared to 69 times per year).

■ As was the case in 2013, the study shows that the **age** of a person and the **language they speak** have a strong influence on viewing habits:

- While **the vast majority (78%) of English-speaking Canadians** surveyed say they are **unilingual when it comes to movies** (watch 100% of their films in English), **French-speaking Quebecers** definitely watch most of their content in French, but **only half of them (54%) report watching movies in this language exclusively**.
- As for where films are viewed, the **tendency to stay put increases with age**. While home is where 70% of 15- to 17-year-olds watch movies, this proportion jumps to 84% for older viewers.
- Also, of the few people surveyed who watch movies outside their home using a mobile device (3%), **most are in the youngest age range** (15- to 17-year-olds).





1

What are the **viewing habits of Canadians with regards to feature films** and what are the **latest trends** emerging in this industry?

- Furthermore, when looking at how people perceive their movie consumption, we see **the number of consumers who feel they watch more movies than a year ago is almost the same as those who feel they watch less** (21% and 20% respectively). These figures indicate there has been a clear break with the 2013 survey results, which showed that twice as many consumers considered they watched more movies than the previous year compared to those who watched less (29% compared to 14%).



The reasons given to explain the increase in movie watching **are similar to those listed in 2013:**

- More interested/More spare time (50%)
- Preference for digital viewing (especially through Netflix), which provides consumers with more options, greater flexibility and better quality programming compared to regular television (25%)
- Easier access to movies and platforms (20%)

These last two reasons suggest that new technologies are **becoming increasingly important and that they have a growing impact on the way Canadians consume video content.**

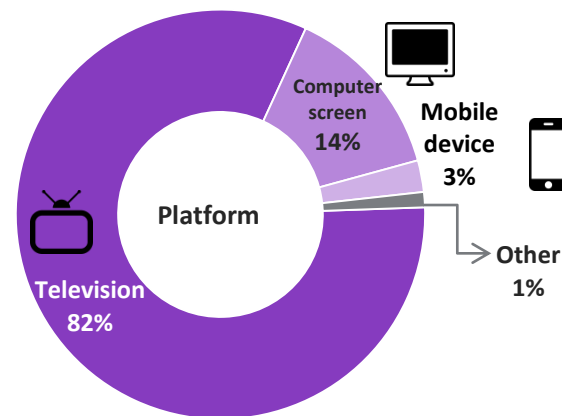


The reasons behind the decrease in movie watching mainly (72%) revolve around a **lack of interest**, but especially around a lack of spare time for enjoying films.

Secondary reasons given by respondents to explain this phenomenon include a **shift towards TV series** (7%) and the **increasingly prohibitive cost of going to the movie theatre** (3%).

- Looking at the data behind the last movie watched by consumers reveals a new reality is emerging when it comes to how content is viewed. **Watching movies live on TV** is now only common practice for a quarter (26%) of respondents, which means this type of viewing is **facing intense competition from several other content acquisition platforms.**
- However, data shows that television is still the screen of choice for consumers (82%), confirming observations from the qualitative section of the survey carried out in the spring of 2014. Viewers especially appreciate being able to watch movies on their large screens from the comfort of their favourite chair.
- It should also be noted that **personal video recorders (PVRs) and paid streaming are listed as the most popular means for watching films** (used an average of 31 and 32 times in the last year, respectively).

Platform used for watching last movie



2

What are the **viewing habits of Canadians with regards to series** and what are the **latest trends** emerging in this industry?



- Data revealed that TV series/soap operas are the **cultural products most consumed** by Canadians. More than four out of five (81%) respondents say they watch one episode at least once a week (compared to 51% for films) and average approximately 174 episodes per year. Furthermore, nearly one quarter (24%) of those surveyed mention they watch more series now than they did last year.
 - ↳ The shorter running time of an episode compared to a feature film is a key factor in explaining this significantly higher frequency of watching.
 - ↳ This type of **content is now fully integrated into the viewing habits** of Canadians. Series are clearly competing with feature films when it comes to the spare time of Canadian consumers.
- While less than one out of three (29%) Canadians watch a movie live on TV at least once a week nowadays, the numbers tell a completely different story when it comes to series. Watching an episode **live on TV** happens at least once a week for nearly two out of three (63%) viewers based on Canadians who watched at least one episode of a series in the past year. Consequently, **Canadians have much stronger ties to series than they do to feature films.**
- Canadians have identified **personal video recorders** as one of the most popular platforms for watching series.
 - ↳ The qualitative section of this study reveals that many people opt for “delayed live” viewing, meaning they record an episode to watch it a few minutes after it starts so they can skip commercials.
- A few **differences in use between French-speaking Quebecers and English-speaking Canadians** should be highlighted:
 - ↳ While video-on-demand and pay-per-view TV are more popular with French-speaking Quebecers, watching a series on a mobile device and renting series in a video store are over-represented with English-speaking Canadians.
- Last but not least, **streaming seems to be a pretty common means of acquiring content online** when it comes to watching series, with an average consumption frequency in the past year of 34 times for paid and 25 times for free.

3 What do **Canadians like** and **prefer** when it comes to feature films?



- **The type of movie is clearly a key factor** for a majority (68%) of viewers when choosing a film.
 - This choice criterion received an average importance score of 7.8 out of 10, slightly surpassing **the topic, story, facts and/or the book that inspired the movie**, which was given an average score of 7.3.
- As was the case in 2013, **the country of origin of a film has limited importance** to viewers, with half the respondents considering this criterion “Not important.”
 - However, the survey reveals that French-speaking Quebecers care more about the country of origin of a movie and award a higher importance score to Canadian films.
 - **Quebec films** seem to be **more appealing to Quebecers compared to last year**. In fact, nearly one third (31%) of Quebec respondents say they’re very interested in these movies compared to only one quarter (24%) in 2013.
- When asked what types of movies interest them most, viewers surveyed identified four major categories: **comedies** (average interest score of 7.7), **action/adventure** films (7.5), **dramas** (7.3) and **mysteries/thrillers** (7.3).
 - Obviously, **there are many differences between age groups**. While dramas (7.5), mysteries/thrillers (7.4), comedies (7.2) and action films (7.1) top the list for viewers 55 years old and over, 15- to 17-year-olds seem to prefer comedies (8.2), action flicks (7.5), sci-fi films (6.6) and animated movies (6.6).

4

What do Canadians **know** about the movie business and how do **they perceive the Canadian film industry?**

- While French-speaking Quebecers and English-speaking Canadians share similar interests when it comes to different types of films, the story is quite different when it comes to their knowledge and perceptions of the film industry.

French-speaking Quebecers

- First of all, **French-speaking Quebecers are more aware of Quebec-made films**. They had an easier time identifying the country of origin of the films they were presented with and had no trouble spotting those made in Quebec, including *Louis Cyr* (2013) and *Gabrielle* (2013), which were recognized as Quebec films by 99% and 96% of Quebec respondents, respectively. They also **believe more strongly in the quality of national films** and give greater importance to the **distribution** and **promotion** of these films.
 - It is interesting to note that French-speaking Quebecers believe it is equally important to promote French-language Canadian films outside the country (58%), the majority being convinced the quality of these films is just as good as those from other countries (55%).
 - Also, more than eight out of ten Quebecers claim they can name a Canadian or Quebec film (85%) or series (87%). These results are quite impressive compared to answers given by English-speaking Canadians since only 38% of them say they can name a Canadian film and 59% a Canadian series.

English-speaking Canadians

- English-speaking Canadians **had a hard time identifying the country of origin of the films they were presented with**, guessing correctly less than 50% of the time for most movies. This could explain why nearly half (45%) of them find **the current level of promotion and advertising of homegrown films to be lacking**. This subgroup also calls for increased access to Canadian productions, claiming they would like to see them broadcast on television (48%), available online (46%) and presented in Canadian movie theatres (45%).

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Detailed results

Audiovisual content viewing habits



WATCHING AUDIOVISUAL CONTENT STILL HOLDS A MAJOR PLACE IN THE VIEWING HABITS OF CANADIANS

- The majority of people surveyed report **watching audiovisual content** (movies, series, professional or amateur short films and documentaries) **on a regular basis**. Regardless of the type of content consumed, more than half of respondents say they watch at least once a month.
- It goes without saying that certain types of content are more frequently watched than others.

174*

Annual consumption frequency of series/soap opera episodes

- The data collected through this survey reveals that **TV series/soap operas are the cultural products most consumed by Canadians** again this year. Episodes of these shows are watched an amazing average of 174 times per year (approximately 3.3 episodes per week), which is very close to last year's average of 179. As revealed in the qualitative section of this project, the shorter running time of an episode compared to a feature film is a key factor in explaining this significantly higher consumption frequency.
- Again this year, more than four out of five (82%) Canadians surveyed watch a series/soap opera episode at least once a week. Given this high consumption frequency, it's safe to say that this type of content is now firmly ingrained in the viewing habits of Canadians.
- Another noteworthy observation is that certain subgroups consume more series than others, reporting considerably higher consumption frequencies. For example:
 - English-speaking Canadians (82% compared to French-speaking Canadians with 79%)
 - Consumers 18 to 34 years old (85% compared to those 35 years old and over with 81% and 15- to 17-year-olds with 74%)

* This figure is approximate since it is based on extrapolations of consumption frequency. For example, a person who reported consuming series every or almost every day was given a value of 300 times a year and a person who answered approximately once every 2 to 3 months was given an average of 5 times a year.



WATCHING AUDIOVISUAL CONTENT STILL HOLDS A MAJOR PLACE IN THE VIEWING HABITS OF CANADIANS (CONT'D)

- **Movies (feature films) rank in second place with an average consumption frequency of 78 times per year.**
 - This represents a slight decrease compared to last year's results which reported the average consumption frequency for 2013 was 85 times per year.
- As for average weekly movie watching, the consumption frequency of respondents in 2014 is comparable to the one in 2013 (52% watch movies at least once a week compared to 53%, respectively).

78*

Annual consumption frequency of movies

60*

Annual consumption frequency of professional or amateur short films

57*

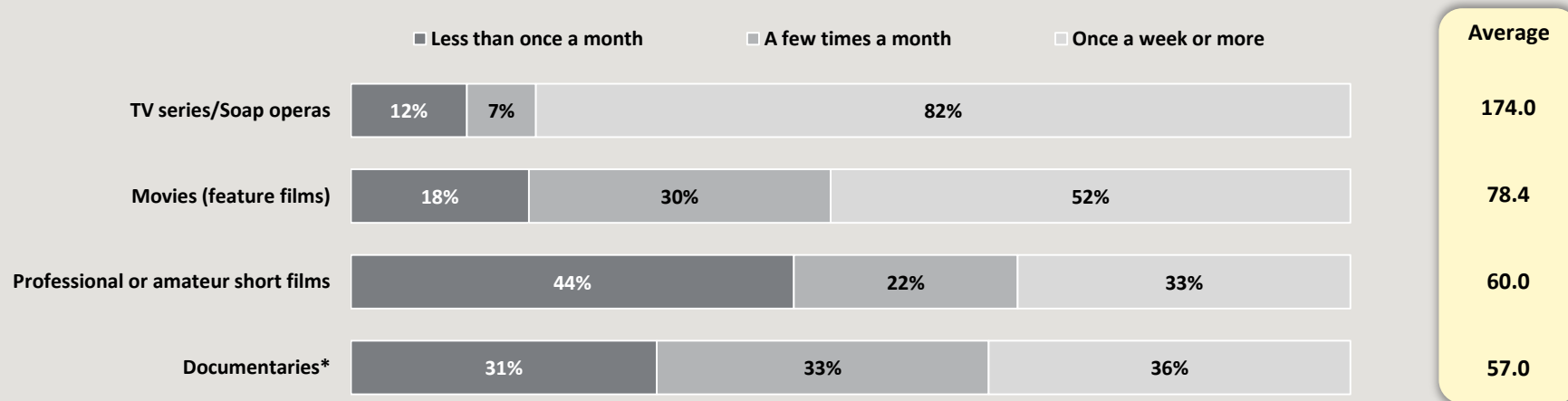
Annual consumption frequency of documentaries

- **Professional or amateur short films and documentaries are the least popular categories of video content**, but they are still consumed an average of 60 and 57 times per year, respectively. It should be noted that the “Documentaries” category – which was presented to respondents as “Documentaries (either features or episodes)” – was new to the survey this year. Keeping this in mind, it’s quite possible a few respondents took shows like *Découvertes* or other programs on specialty channels such as Canal D, National Geographic and PBS into consideration when giving their answers.
- Here’s an interesting fact: While the youngest Canadians (15- to 17-year-olds) surveyed appear to be the biggest consumers of professional or amateur short films (as on YouTube, for example) with an average consumption frequency of 156 times per year, the oldest respondents (55 years old and over) are the main consumers of documentaries (as features or episodes) with an average consumption frequency of 67 times per year.

* These figures are approximate since they are based on extrapolations of consumption frequency. For example, a person who reported consuming movies every or almost every day was given a value of 300 times a year and a person who answered approximately once every 2 to 3 months was given an average of 5 times a year.

Consumption frequency of films and TV series/soap operas

QA1. How often do you watch the following four types of content? Please think about the content you watch at home, in movie theatres, on planes, at a friend's place or anywhere else.



* It should be noted that the “Documentaries” category was added to the survey this year. It was presented to respondents as “Documentaries (either features or episodes).” Keeping this in mind, it’s quite possible a few respondents took reports seen on shows like *Découvertes* or other programs on specialty channels such as Canal D, National Geographic and PBS into consideration when giving their answers, which could explain the relatively high consumption frequency reported.

Consumption frequency of films and TV series/soap operas (cont'd)

QA1. How often do you watch the following four types of content? Please think about the content you watch at home, in movie theatres, on planes, at a friend's place or anywhere else.

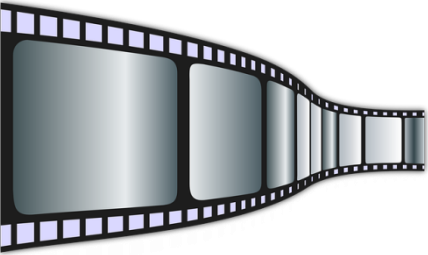
| | Total | | Region | | | |
|--|---------------|---------------|--------------|---------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| TV series / Soap operas | n = 1800 | n = 2421 | n = 772 | n = 579 | n = 542 | n = 528 |
| Less than once a month | 9% ↓ | 12% ↑ | 13% | 11% | 11% | 12% |
| A few times a month | 7% | 7% | 8% | 6% | 7% | 9% |
| Once a week or more | 85% ↑ | 82% ↓ | 79% | 83% | 82% | 79% |
| AVERAGE: | 179.0 | 174.0 | 173.0 | 176.0 | 174.0 | 170.0 |
| Movies (feature films) | n = 1800 | n = 2421 | n = 772 | n = 579 | n = 542 | n = 528 |
| Less than once a month | 20% | 18% | 18% | 16% | 20% | 18% |
| A few times a month | 27% ↓ | 30% ↑ | 28% | 34% ↑ | 27% | 31% |
| Once a week or more | 53% | 52% | 54% | 50% | 53% | 51% |
| AVERAGE: | 85.0 ↑ | 78.4 ↓ | 81.3 | 78.2 | 77.3 | 75.1 |
| Professional or amateur short films | n = 1800 | n = 2421 | n = 772 | n = 579 | n = 542 | n = 528 |
| Less than once a month | 39% ↓ | 44% ↑ | 45% | 45% | 41% ↓ | 52% ↑ |
| A few times a month | 23% | 22% | 21% | 24% | 23% | 20% |
| Once a week or more | 38% ↑ | 33% ↓ | 34% | 32% | 36% | 28% ↓ |
| AVERAGE: | 66.0 ↑ | 60.0 ↓ | 65.0 | 54.0 ↓ | 65.0 | 50.0 ↓ |
| Documentaries | n = 0 | n = 2421 | n = 772 | n = 579 | n = 542 | n = 528 |
| Less than once a month | | 31% | 32% | 31% | 29% | 34% |
| A few times a month | | 33% | 30% | 33% | 36% | 32% |
| Once a week or more | | 36% | 38% | 36% | 35% ↓ | 34% |
| AVERAGE: | | 57.0 | 58.6 | 60.2 | 54.0 | 46.7 ↓ |

Consumption frequency of films and TV series/soap operas (cont'd)

QA1. How often do you watch the following four types of content? Please think about the content you watch at home, in movie theatres, on planes, at a friend's place or anywhere else.

| | Total 2014 | Age | | | | Region / Language spoken | |
|--|---------------|-----------------------|-----------------------|-----------------------|--------------------------|---------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French- speaking Canada |
| TV series / Soap operas | n = 2421 | n = 115 | n = 578 | n = 883 | n = 845 | n = 662 | n = 2416 |
| Less than once a month | 12% | 14% | 9% ↓ | 12% | 13% | 13% | 11% |
| A few times a month | 7% | 12% ↑ | 6% | 7% | 7% | 8% | 7% |
| Once a week or more | 82% | 74% ↓ | 85% ↑ | 81% | 80% | 79% ↓ | 82% ↑ |
| AVERAGE: | 174.0 | 158.0 | 179.0 | 173.0 | 173.0 | 170.0 | 175.0 |
| Movies (feature films) | n = 2421 | n = 115 | n = 578 | n = 883 | n = 845 | n = 662 | n = 2416 |
| Less than once a month | 18% | 25% ↑ | 12% ↓ | 16% | 24% ↑ | 18% | 18% |
| A few times a month | 30% | 29% | 32% | 32% | 27% ↓ | 28% | 31% |
| Once a week or more | 52% | 46% | 56% ↑ | 52% | 50% | 54% | 51% |
| AVERAGE: | 78.4 | 76.1 | 82.6 | 77.6 | 76.2 | 79.8 | 78.1 |
| Professional or amateur short films | n = 2421 | n = 115 | n = 578 | n = 883 | n = 845 | n = 662 | n = 2416 |
| Less than once a month | 44% | 16% ↓ | 34% ↓ | 45% | 56% ↑ | 45% | 44% |
| A few times a month | 22% | 9% ↓ | 23% | 27% ↑ | 18% ↓ | 21% | 23% |
| Once a week or more | 33% | 75% ↑ | 43% ↑ | 28% ↓ | 25% ↓ | 34% | 33% |
| AVERAGE: | 60.0 | 156.0 ↑ | 87.0 ↑ | 46.0 ↓ | 39.0 ↓ | 64.0 | 59.0 |
| Documentaries | n = 2421 | n = 115 | n = 578 | n = 883 | n = 845 | n = 662 | n = 2416 |
| Less than once a month | 31% | 40% ↑ | 37% ↑ | 30% | 25% ↓ | 31% | 31% |
| A few times a month | 33% | 31% | 34% | 36% | 30% ↓ | 31% | 34% |
| Once a week or more | 36% | 29% | 29% ↓ | 34% | 45% ↑ | 39% | 36% |
| AVERAGE: | 57.0 | 43.8 ↓ | 49.0 ↓ | 55.2 | 67.0 ↑ | 59.0 | 56.4 |

Viewer habits – FILM SECTION



SLOWER GROWTH IN MOVIE CONSUMPTION COMPARED TO LAST YEAR

- We asked Canadians if they felt they were watching more, as many or less films than they were a year ago. Results for 2014 are almost the same for consumers who feel they watch more than those who feel they watch less than a year ago (21% and 20%, respectively). These figures are quite different from the ones obtained in 2013 when twice as many consumers felt they watched more movies than the previous year (29% compared to 14 %).
- The reasons given to explain the increase in movie watching are similar to the ones listed in 2013:
 - **More interested/More spare time:** It comes as no surprise that half (50%) of the respondents who claim they watch more movies than they did a year ago give this reason for doing so.
 - **Preference for digital viewing:** A quarter (25%) of Canadians surveyed report increasingly enjoying digital viewing (especially via Netflix, which was mentioned in an impressive 15% of cases), since it provides them with more options, greater flexibility and better quality programming than regular television.
 - **Easier access to movies and platforms:** Some 20% of respondents say that having easier access to content is responsible for their increased movie consumption.
- These last two results demonstrate **the growing impact of new technologies** on the way video content is consumed.
- While 21% of Canadians surveyed report watching more films than they did a year ago, the movie consumption of certain subgroups has increased considerably more than for others, including:
 - The 15- to 17-year-olds (40% compared to 25% for 18- to 34-year-olds, 20% for 35- to 54-year-olds and 18% for those 55 and older)
 - Respondents from Ontario (25% compared to 22% from Western Canada, 19% from Atlantic Canada and 15% from Quebec)
 - English-speaking Canadians (23% compared to 14% for French-speaking Quebecers)
- The reasons behind the decrease in movie consumption mainly (72%) revolve around a **lack of interest, but especially around a lack of spare time for enjoying films**. Several secondary reasons, including a shift towards series (7%) and the increasingly prohibitive cost of going to the movie theatre (3%), also help explain why Canadians surveyed are watching less movies. It should be noted that with a national average of more than one movie being watched every week, certain people feel they've seen most of what's on offer or criticise the lack of originality and/or variety of what is available.
- Finally, based on results from the last two surveys, we can see that **for nearly three out of five respondents, movie consumption has changed very little** (59% in 2014 compared to 58% in 2013).

Number of movies watched in the past month

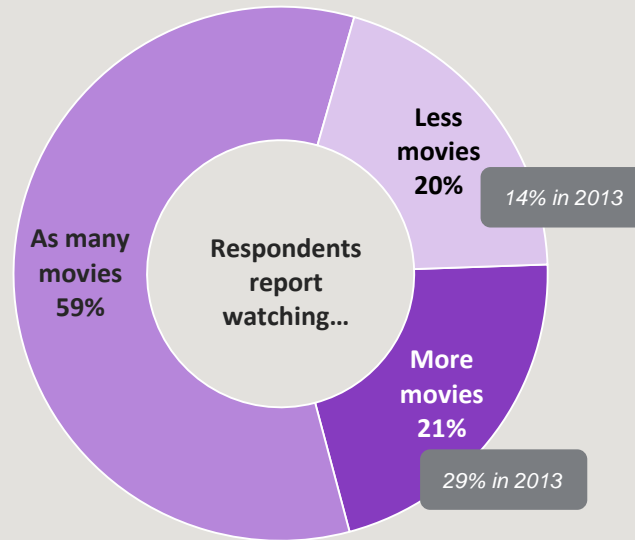
QA3. More specifically, how many movies have you watched in the past month?

| | Total | | Region | | | |
|---------------------|------------------|------------------|-------------------|--------------------|---------------------------|----------------------------|
| | 2013 n = 1167 | 2014 n = 1951 | Quebec n = 518 | Ontario n = 503 | Western Canada n = 478 | Atlantic Canada n = 452 |
| 1 to 5 movies | 46% ↓ | 54% ↑ | 58% ↑ | 53% | 52% | 48% ↓ |
| 6 to 10 movies | 31% ↑ | 27% ↓ | 23% ↓ | 27% | 31% ↑ | 31% |
| More than 10 movies | 23% ↑ | 19% ↓ | 19% | 20% | 17% | 21% |
| AVERAGE: | 9.3 ↑ | 8.1 ↓ | 7.7 | 8.7 | 7.8 | 8.2 |

| | Total 2014 n = 1951 | Age | | | | Region / Language spoken | |
|---------------------|---------------------------|---------------------------------|----------------------------------|----------------------------------|-------------------------------------|--------------------------------------|---------------------------------------|
| | | 15 to 17 years old n = 77 | 18 to 34 years old n = 538 | 35 to 54 years old n = 719 | 55 years old and over n = 617 | French-speaking Quebec n = 443 | English-speaking / ROC n = 1508 |
| 1 to 5 movies | 54% ↑ | 57% | 55% | 52% | 54% | 59% ↑ | 52% ↓ |
| 6 to 10 movies | 27% ↓ | 19% | 28% | 29% | 26% | 23% ↓ | 28% ↑ |
| More than 10 movies | 19% ↓ | 24% | 17% | 20% | 20% | 18% | 19% |
| AVERAGE: | 8.1 ↓ | 7.7 | 8.1 | 8.1 | 8.3 | 7.3 ↓ | 8.4 ↓ |

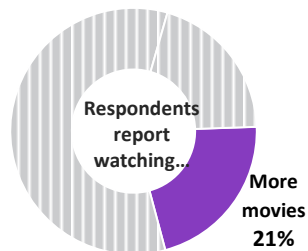
Number of movies watched in the past month (cont'd)

QA4. Compared to a year ago, would you say that you watch...

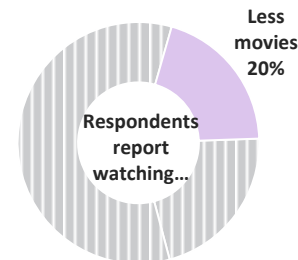


Number of movies watched in the past month (cont'd)

QA4. Compared to a year ago, would you say that you watch...



QA4. Compared to a year ago, would you say that you watch...



| Q5 Why watch more movies | Total n = 615 |
|---|------------------|
| SUBTOTAL: More interested / more spare time | 50% |
| More time / More spare time | 23% |
| More movies appeal to me / are in my field of interest | 5% |
| Retired | 4% |
| Children are older/more independent / watch more movies | 4% |
| Greater interest in movies | 4% |
| Fan of movies / film buff / like movies | 3% |
| It's fun / entertaining | 3% |
| It's relaxing / helps me relax | 2% |
| SUBTOTAL: Prefer digital viewing | 25% |
| Netflix / Netflix membership | 15% |
| Low-quality programming / regular content on TV | 3% |
| More options available online (streaming, etc.) | 3% |
| Can watch movie when I want / it's convenient | 2% |
| Don't watch TV / have cable anymore | 1% |
| SUBTOTAL: Access (to movies, sources or platforms) | 20% |
| Easier access to movies | 6% |
| Better film selection / better quality movies available | 5% |
| More movie channels available / subscribe to | 2% |
| More choices | 2% |
| Have movie service / package with TV subscription | 1% |
| SUBTOTAL: Influence of family / friends | 6% |
| Watch with friend / spouse / family / wants to watch | 6% |
| SUBTOTAL: Increased outings to movie theatres | 5% |
| SUBTOTAL: Better quality of movies | 3% |
| Better quality of movies | 3% |
| SUBTOTAL: Other | 13% |
| Don't go out / Can't go out as often as before | 5% |
| DNK/DNA | 3% |

| Q5 Why watch less movies | Total n = 621 |
|--|------------------|
| SUBTOTAL: Less interested / less spare time | 72% |
| Not enough time / Too busy | 40% |
| Less interested / Film selection less interesting | 13% |
| We had a baby / have children | 11% |
| Work / Work too much / Too busy with work | 7% |
| Have other activities / hobbies (reading, etc.) | 5% |
| Too busy with school | 4% |
| Prefer to use computer / internet (sm, videos, games, etc.) | 3% |
| Go out often / Prefer outdoor activities | 2% |
| Don't have / Have less interest in watching movies | 2% |
| SUBTOTAL: Low-quality movies / Inadequate content | 11% |
| Poor film selection / Movies available are bad | 4% |
| Poor quality of movies | 3% |
| Special effects / Too much emphasis on special effects | 2% |
| SUBTOTAL: Less variety / Variety of content besides movies | 10% |
| Watch more series / Watch series instead of movies | 7% |
| Not original / Always the same kind of story / formula | 2% |
| Less options | 1% |
| SUBTOTAL: Lack of access (to movies, sources or platforms) / Expensive | 8% |
| Finances / On a tighter budget this year | 3% |
| No longer watch TV / have cable | 2% |
| No longer have movie rental store nearby | 2% |
| SUBTOTAL: Less outings to movie theatres | 6% |
| Going to the movies is too expensive | 3% |
| SUBTOTAL: Less interest in watching movies live on TV (not enough variety / schedule doesn't work / too many ads) | 6% |
| Not enough variety / Always show the same movies | 2% |
| SUBTOTAL: Other | 6% |
| DNK/DNA | 2% |

Movie-watching trends

QA4. Compared to a year ago, would you say that you watch...

| | Total | | Region | | | |
|----------------|------------------|------------------|-------------------|--------------------|---------------------------|----------------------------|
| | 2013 n = 1800 | 2014 n = 3055 | Quebec n = 771 | Ontario n = 784 | Western Canada n = 769 | Atlantic Canada n = 731 |
| More movies | 29% ↑ | 21% ↓ | 15% ↓ | 25% ↑ | 22% | 19% |
| As many movies | 58% | 59% | 62% | 57% | 58% | 60% |
| Less movies | 14% ↓ | 20% ↑ | 24% ↑ | 18% ↓ | 20% | 21% |

| | Total 2014 n = 3055 | Age | | | | Region / Language spoken | |
|----------------|---------------------------|----------------------------------|----------------------------------|-----------------------------------|--------------------------------------|--------------------------------------|---------------------------------------|
| | | 15 to 17 years old n = 114 | 18 to 34 years old n = 755 | 35 to 54 years old n = 1107 | 55 years old and over n = 1079 | French-speaking Quebec n = 659 | English-speaking / ROC n = 2396 |
| More movies | 21% ↓ | 40% ↑ | 25% ↑ | 20% | 18% ↓ | 14% ↓ | 23% ↑ |
| As many movies | 59% | 36% ↓ | 53% ↓ | 61% | 64% ↑ | 61% | 58% |
| Less movies | 20% ↑ | 24% | 22% | 19% | 19% | 25% ↑ | 19% ↓ |

General movie-watching conditions



AGE AND LANGUAGE SPOKEN GREATLY INFLUENCE MOVIE-WATCHING HABITS

■ Again this year, the survey reveals that French-speaking Quebecers and English-speaking Canadians are at opposite ends of the spectrum in terms of viewing language.

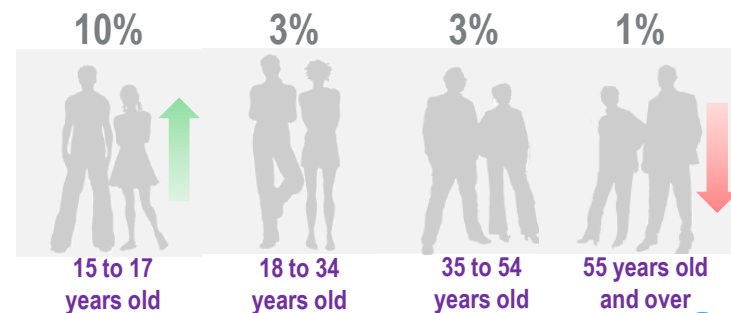
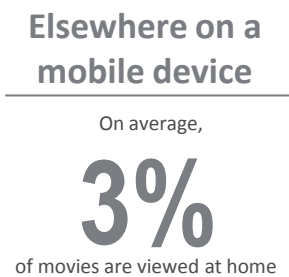
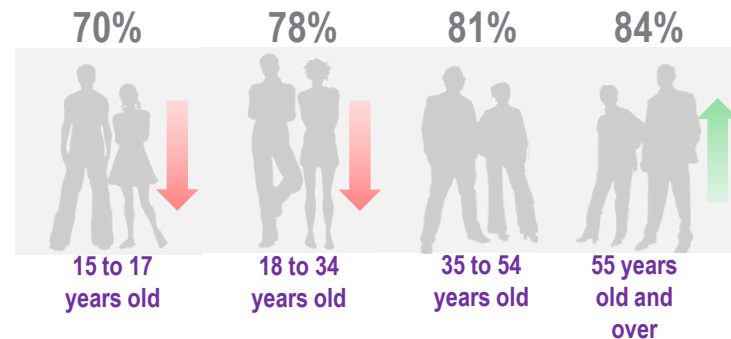
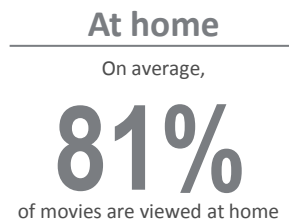
- **The vast majority of English-speaking Canadians surveyed watch their content almost exclusively in English.** On average, 96% of the content they watch is in English and 78% of them can be categorized as unilingual English speakers since 100% of the content they watch is in that language. In this consumer segment, watching movies in a foreign language is more common than for French-speaking Quebecers, but the numbers are still very low (3% compared to 1%).
- On the other hand, **French-speaking Quebecers watch most of their content in French** (80% on average) and more than half (54%) of them report watching movies in their language exclusively.

■ As far as viewing location is concerned, an average of four out of five (81%) movies are watched at home. These numbers surpass those obtained in the 2013 survey, which suggests that consumers now have easier access to films in their home.

■ However, we can see the **tendency to stay put increases with age**. While home is where 70% of 15-to 17-year-olds watch movies, this proportion reaches 84% with older viewers.

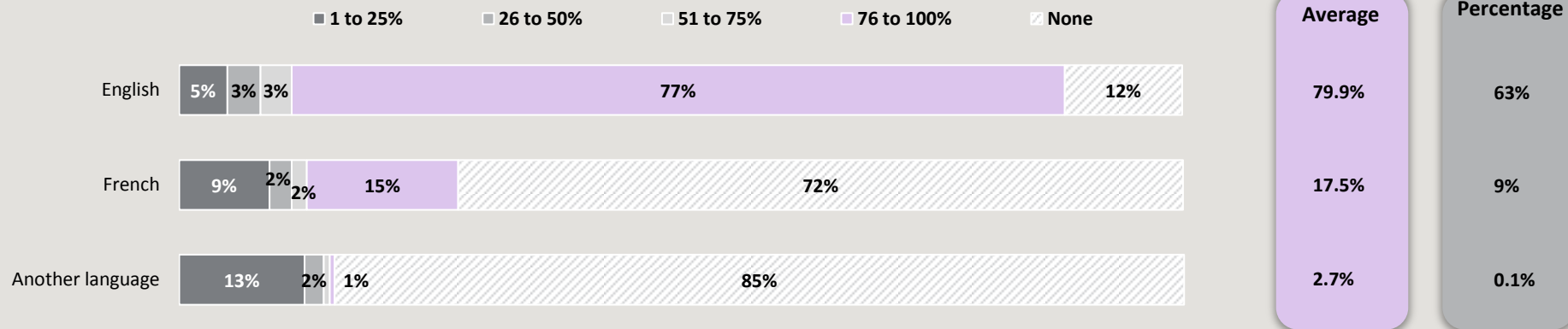
■ A noteworthy observation is that of the few people surveyed who watch movies **outside their home using a mobile device** (3%), **most are in the youngest age range of 15- to 17-year-olds** (they watch an average of 10% of their movies outside their home compared to 3% for 18- to 43-year-olds, 3% for 35- to 44-year-olds and 1% for those 55 and older).

■ As for feature films, 16% of them are seen in movie theatres (compared to 18% in 2013).

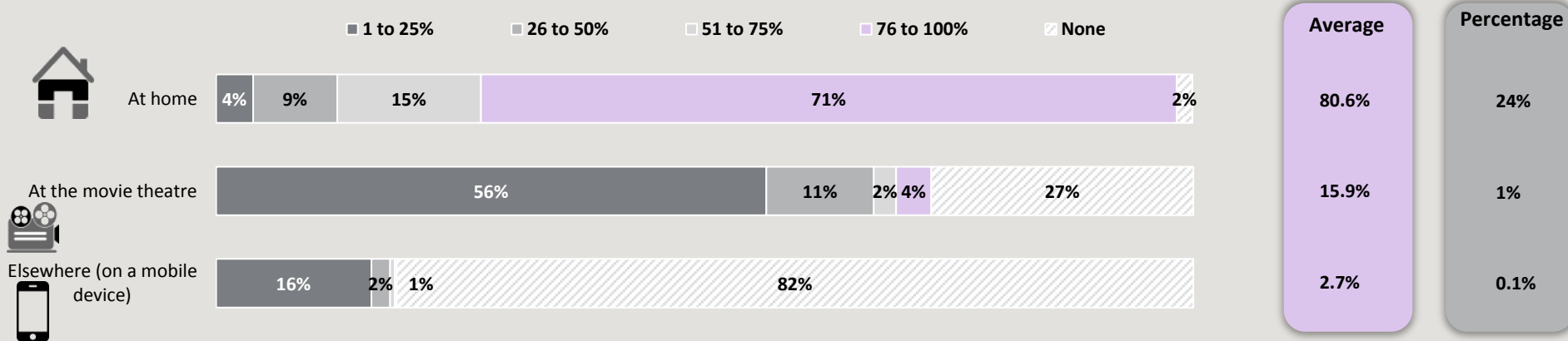


General movie-watching conditions (cont'd)

QA6. What proportion of the movies you watch are in...



QA7. What proportion of movies do you watch in each of the following locations:



General movie-watching conditions (cont'd)

QA6. What proportion of the movies you watch are in...

| | Total | | Region | | | |
|----------------------------|---------------|---------------|---------------|---------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| In English | n = 1800 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| 1 to 25% | 5% | 5% | 18% ↑ | 1% ↓ | 1% ↓ | 0% ↓ |
| 26 to 50% | 5% ↑ | 3% ↓ | 9% ↑ | 1% ↓ | 2% ↓ | 1% ↓ |
| 51 to 75% | 3% | 3% | 4% ↑ | 4% | 2% | 1% ↓ |
| 76 to 100% | 81% ↑ | 77% ↓ | 22% ↓ | 94% ↑ | 95% ↑ | 97% ↑ |
| None | 6% ↓ | 12% ↑ | 48% ↑ | 0% ↓ | 0% ↓ | 0% ↓ |
| <i>Proportion of 100%</i> | 61% | 63% | 11% ↓ | 78% ↑ | 79% ↑ | 87% ↑ |
| AVERAGE: | 84.3 ↑ | 79.9 ↓ | 29.4 ↓ | 95.3 ↑ | 96.1 ↑ | 97.7 ↑ |
| In French | n = 1800 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| 1 to 25% | 12% ↑ | 9% ↓ | 12% ↑ | 9% | 8% | 7% ↓ |
| 26 to 50% | 4% ↑ | 2% ↓ | 8% ↑ | 0% ↓ | 0% ↓ | 1% ↓ |
| 51 to 75% | 1% | 2% | 6% ↑ | 0% ↓ | 0% ↓ | 0% ↓ |
| 76 to 100% | 10% ↓ | 15% ↑ | 62% ↑ | 0% ↓ | 0% ↓ | 0% ↓ |
| None | 74% | 72% | 13% ↓ | 91% ↑ | 91% ↑ | 92% ↑ |
| <i>Proportion of 100%</i> | 6% ↓ | 11% ↑ | 47% ↑ | 0.2% ↓ | 0.1% ↓ | 0.1% ↓ |
| AVERAGE: | 12.5 ↓ | 17.5 ↑ | 69.4 ↑ | 1.1 ↓ | 1.0 ↓ | 1.1 ↓ |
| In another language | n = 1800 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| 1 to 25% | 16% ↑ | 13% ↓ | 8% ↓ | 14% | 15% ↑ | 8% ↓ |
| 26 to 50% | 2% | 2% | 1% ↓ | 3% ↑ | 2% | 1% ↓ |
| 51 to 75% | 1% ↑ | 1% ↓ | 0% | 1% | 1% | 0% |
| 76 to 100% | 0% | 1% | 0% ↓ | 1% ↑ | 0% | 0% |
| None | 80% ↓ | 85% ↑ | 91% ↑ | 82% ↓ | 82% ↓ | 91% ↑ |
| <i>Proportion of 100%</i> | 0.1% | 0.1% | 0.0% | 0.1% | 0.1% | 0.1% |
| AVERAGE: | 3.3 | 2.7 | 1.2 ↓ | 3.6 ↑ | 2.9 | 1.2 ↓ |

General movie-watching conditions (cont'd)

QA6. What proportion of the movies you watch are in...

| | Total 2014 | Age | | | | Region / Language spoken | |
|----------------------------|---------------|-----------------------|-----------------------|-----------------------|--------------------------|---------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French- speaking Canada |
| In English | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| 1 to 25% | 5% | 10% ↑ | 6% ↑ | 5% | 3% ↓ | 20% ↑ | 1% ↓ |
| 26 to 50% | 3% ↓ | 12% ↑ | 3% | 3% | 3% | 9% ↑ | 2% ↓ |
| 51 to 75% | 3% | 5% | 5% ↑ | 3% | 2% ↓ | 4% ↑ | 3% ↓ |
| 76 to 100% | 77% ↓ | 68% ↓ | 78% | 78% | 76% | 11% ↓ | 94% ↑ |
| None | 12% ↑ | 5% ↓ | 8% ↓ | 11% | 16% ↑ | 55% ↑ | 0% ↓ |
| <i>Proportion of 100%</i> | 63% | 51% ↓ | 59% ↓ | 62% | 68% ↑ | 3% ↓ | 78% ↑ |
| AVERAGE: | 79.9 ↓ | 76.7 | 81.6 | 80.5 | 78.4 | 19.3 ↓ | 95.5 ↑ |
| In French | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| 1 to 25% | 9% ↓ | 16% ↑ | 13% ↑ | 10% | 4% ↓ | 10% | 9% |
| 26 to 50% | 2% ↓ | 4% | 3% | 2% | 2% | 8% ↑ | 1% ↓ |
| 51 to 75% | 2% | 1% | 1% | 2% | 2% | 7% ↑ | 0% ↓ |
| 76 to 100% | 15% ↑ | 11% | 12% ↓ | 15% | 18% ↑ | 72% ↑ | 1% ↓ |
| None | 72% | 68% | 72% | 72% | 73% | 3% ↓ | 90% ↑ |
| <i>Proportion of 100%</i> | 11% ↑ | 4% ↓ | 8% ↓ | 11% | 16% ↑ | 54% ↑ | 0.2% ↓ |
| AVERAGE: | 17.5 ↑ | 14.6 | 14.9 ↓ | 17.0 | 20.4 ↑ | 79.7 ↑ | 1.4 ↓ |
| In another language | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| 1 to 25% | 13% ↓ | 12% | 17% ↑ | 14% ↑ | 7% ↓ | 7% ↓ | 14% ↑ |
| 26 to 50% | 2% | 8% ↑ | 3% | 2% | 1% ↓ | 1% ↓ | 2% ↑ |
| 51 to 75% | 1% ↓ | 3% ↑ | 1% | 0% | 0% | 0% | 1% |
| 76 to 100% | 1% | 2% ↑ | 1% | 1% | 0% ↓ | 0% ↓ | 1% ↑ |
| None | 85% ↑ | 75% ↓ | 79% ↓ | 83% | 92% ↑ | 92% ↑ | 83% ↓ |
| <i>Proportion of 100%</i> | 0.1% | 0.0% | 0.0% | 0.2% | 0.1% | 0.0% | 0.1% |
| AVERAGE: | 2.7 | 8.7 ↑ | 3.5 ↑ | 2.6 | 1.2 ↓ | 1.0 ↓ | 3.1 ↑ |

It should be noted that **young French-speaking Quebecers have a stronger tendency to watch content in English than their elders**. While the overall average for watching English-language content is at 19.3% for French-speaking Quebecers of all ages, it sits at 23% for 15- to 17-year-olds, 30% for 18- to 34-year-olds, 17% for 35- to 54-year-olds and 14% for those 55 and older.

General movie-watching conditions (cont'd)

QA7. What proportion of movies do you watch in each of the following locations:

| | Total | | Region | | | |
|---------------------------------|---------------|---------------|---------------|---------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| At home | n = 1800 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| 1 to 25% | 7% ↑ | 4% ↓ | 3% ↓ | 4% | 5% | 3% |
| 26 to 50% | 11% ↑ | 9% ↓ | 8% | 10% ↑ | 8% | 7% |
| 51 to 75% | 20% ↑ | 15% ↓ | 12% ↓ | 15% | 16% | 14% |
| 76 to 100% | 61% ↓ | 71% ↑ | 76% ↑ | 68% ↓ | 70% | 75% ↑ |
| None | 2% | 2% | 2% | 2% | 1% | 1% |
| <i>Proportion of 100%</i> | 15% ↓ | 24% ↑ | 32% ↑ | 20% ↓ | 23% | 29% ↑ |
| AVERAGE: | 75.5 ↓ | 80.6 ↑ | 83.6 ↑ | 78.3 ↓ | 80.3 | 83.9 ↑ |
| At the movie theatre | n = 1800 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| 1 to 25% | 58% | 56% | 52% ↓ | 59% | 57% | 56% |
| 26 to 50% | 13% | 11% | 9% ↓ | 13% ↑ | 11% | 9% |
| 51 to 75% | 3% | 2% | 2% | 2% | 2% | 2% |
| 76 to 100% | 5% | 4% | 3% | 4% | 4% | 2% |
| None | 22% ↓ | 27% ↑ | 34% ↑ | 22% ↓ | 26% | 31% ↑ |
| <i>Proportion of 100%</i> | 1% | 1% | 1% | 2% | 1% | 1% |
| AVERAGE: | 18.1 ↑ | 15.9 ↓ | 13.6 ↓ | 17.9 ↑ | 15.9 | 13.3 ↓ |
| Elsewhere (tablet, etc.) | n = 1800 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| 1 to 25% | 41% ↑ | 16% ↓ | 14% | 16% | 18% | 14% |
| 26 to 50% | 4% ↑ | 2% ↓ | 2% | 2% | 3% | 1% |
| 51 to 75% | 1% | 1% | 0% | 0% | 1% | 1% |
| 76 to 100% | 1% ↑ | 0% ↓ | 0% | 0% | 0% | 0% |
| None | 54% ↓ | 82% ↑ | 84% | 81% | 79% ↓ | 84% |
| <i>Proportion of 100%</i> | 0.1% | 0.1% | 0.1% | 0.0% | 0.3% | 0.0% |
| AVERAGE: | 6.4 ↑ | 2.7 ↓ | 2.4 | 2.6 | 3.3 | 2.4 |

General movie-watching conditions (cont'd)

QA7. What proportion of movies do you watch in each of the following locations:

| | Total 2014 | Age | | | | Region / Language spoken | |
|---------------------------------|---------------|-----------------------|-----------------------|-----------------------|--------------------------|---------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French- speaking Canada |
| At home | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| 1 to 25% | 4% ↓ | 5% | 4% | 4% | 3% | 2% ↓ | 4% ↑ |
| 26 to 50% | 9% ↓ | 19% ↑ | 13% ↑ | 7% ↓ | 6% ↓ | 8% | 9% |
| 51 to 75% | 15% ↓ | 25% ↑ | 21% ↑ | 14% | 9% ↓ | 11% ↓ | 16% ↑ |
| 76 to 100% | 71% ↑ | 51% ↓ | 61% ↓ | 74% ↑ | 79% ↑ | 78% ↑ | 70% ↓ |
| None | 2% | 0% | 1% | 2% | 2% ↑ | 2% | 2% |
| <i>Proportion of 100%</i> | 24% ↑ | 12% ↓ | 13% ↓ | 22% ↓ | 37% ↑ | 34% ↑ | 22% ↓ |
| AVERAGE: | 80.6 ↑ | 70.1 ↓ | 77.6 ↓ | 81.4 | 83.6 ↑ | 84.1 ↑ | 79.7 ↑ |
| At the movie theatre | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| 1 to 25% | 56% | 63% | 63% ↑ | 60% ↑ | 46% ↓ | 51% ↓ | 58% ↑ |
| 26 to 50% | 11% | 19% ↑ | 16% ↑ | 9% ↓ | 8% ↓ | 9% ↓ | 12% ↑ |
| 51 to 75% | 2% | 2% | 3% | 2% | 2% | 2% | 2% |
| 76 to 100% | 4% | 2% | 2% ↓ | 4% | 5% ↑ | 3% | 4% |
| None | 27% ↑ | 15% ↓ | 16% ↓ | 25% | 40% ↑ | 35% ↑ | 25% ↓ |
| <i>Proportion of 100%</i> | 1% | 0.0% | 1% | 1% | 2% ↑ | 1% | 1% |
| AVERAGE: | 15.9 ↓ | 19.1 | 18.8 ↑ | 15.4 | 13.8 | 13.3 ↓ | 16.6 ↓ |
| Elsewhere (tablet, etc.) | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| 1 to 25% | 16% ↓ | 40% ↑ | 20% ↑ | 17% | 8% ↓ | 13% ↓ | 17% ↑ |
| 26 to 50% | 2% ↓ | 12% ↑ | 2% | 2% | 1% ↓ | 1% | 2% |
| 51 to 75% | 1% | 1% | 1% | 1% | 0% ↓ | 1% | 1% |
| 76 to 100% | 0% ↓ | 0% | 0% | 0% | 0% | 0% | 0% |
| None | 82% ↑ | 47% ↓ | 77% ↓ | 81% | 91% ↑ | 85% ↑ | 81% ↓ |
| <i>Proportion of 100%</i> | 0.1% | 0.0% | 0.0% | 0.1% | 0.2% | 0.2% | 0.1% |
| AVERAGE: | 2.7 ↓ | 9.7 ↑ | 3.4 ↓ | 2.8 | 1.2 ↓ | 2.2 | 2.9 |

Movie-watching modes



THE VARIOUS MODES FOR WATCHING MOVIES ARE RANKED IN THE SAME ORDER AS IN 2013

- The various movie-watching modes were ranked in the same order as they were last year.
- Based on the viewing habits of Canadian consumers surveyed, **live movie watching on TV is still No. 1**. In the past year, respondents report watching films live on TV an average of 47 times per year, which is nearly once a week. Furthermore, three out of ten people (30%) say they watched movies this way at least once a week. Although these figures might seem high, we will see later on in the document that most people did not watch their last feature on live TV.
 - An overrepresentation is apparent for certain subgroups, such as respondents from Quebec (who watch movies live on TV an average of 52 times a year compared to Ontario respondents who watch them 48 times a year, Atlantic Canada respondents who watch them 43 times a year and Western Canada respondents who watch them 42 times a year), French-speaking Quebecers (who watch movies live on TV an average of 53 times a year compared to English-speaking Canadians who watch them 46 times a year) and the youngest age group (15- to 17-year-olds who watch movies live on TV an average of 64 times a year compared to those 55 and older who watch them 57 times a year, 35- to 54-year-olds who watch them 46 times a year and 18- to 34-year-olds who post the lowest numbers by far with 33 times a year).
- As in 2013, the **personal video recorder is a popular movie-watching mode**. Ranked in second place, the device was used an average of 31 times in the past year.
- It is worth noting that again this year, **two modes for watching movies are especially popular with the two youngest segments** (15- to 17-year-olds and 18- to 34-year-olds): watching features on mobile devices (including iPad, tablets, smartphones and the PlayStation Portable – PSP) and in movie theatres.

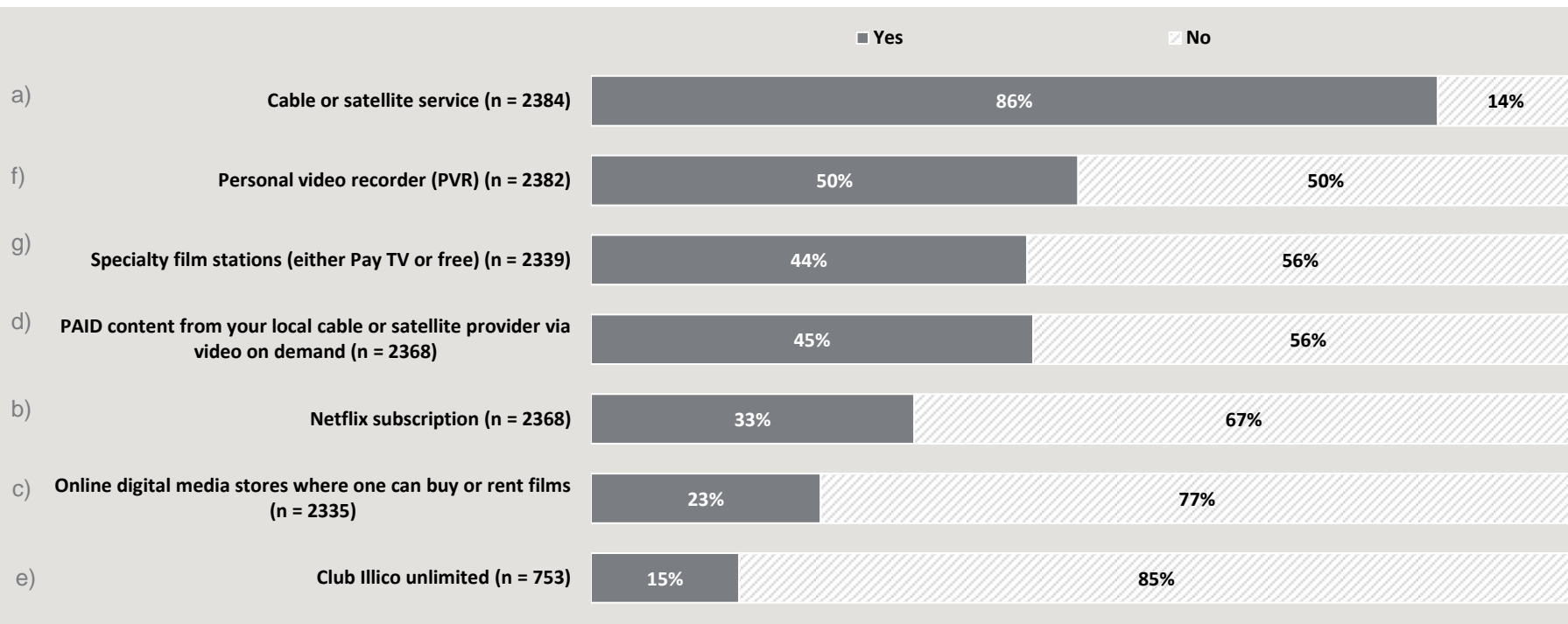


METHODS FOR ACQUIRING CONTENT ONLINE ARE STILL VERY MUCH A PART OF THE VIEWING HABITS OF CANADIANS

- Looking at the numbers, **using online platforms** for watching movies is **fairly common** for the Canadians surveyed. These online content acquisition methods, especially streaming, are now part of their regular viewing habits.
 - As was the case in 2013, **paid streaming is in first place**, having been used approximately 32 times in the past year and at least once a week by 18% of respondents, especially those in the youngest segments (27% for 18- to 34-year-olds and 25% for 15- to 17-year-olds compared to 20% for 35- to 54-year-olds and 9% for those 55 and older) and English-speaking Canadians (21% compared to 8% for French-speaking Quebecers).
 - One can imagine the language barrier and greater wealth of content in English offered through paid streaming largely explain this disparity.
 - **Free streaming follows in second place**, having been used an average of 20 times in the past year and at least once a week by 11% of respondents.
 - Interestingly, free streaming is the most popular movie-watching mode for 15- to 17-year-olds (who used it an average of 45 times in the past year compared to 36 times for 18- to 34-year-olds, 17 times for 35- to 54-year-olds and 7 times for those 55 and older).
 - Free downloads are close behind in third place, having been used an average of 17 times in the past year and at least once a week by one out of ten (10%) respondents.
 - Paid downloads are far behind in last place, having been used by a very small minority (7 times in the past year).

Subscription services

QA8. Among the following services, which do you subscribe to or do you use regularly to watch movies?



Subscription services (cont'd)

QA8. Among the following services, which do you subscribe to or do you use regularly to watch movies?

| | Total | Cycle | | Region | | | |
|--|-----------------|-------|-----------------|------------------|------------------|------------------|------------------|
| | | TFM01 | TFM05 | Quebec | Ontario | Western Canada | Atlantic Canada |
| a) Cable or satellite service % of yes | n = 2384 86% | n = 0 | n = 2384 86% | n = 762 92% ↑ | n = 567 83% ↓ | n = 534 86% | n = 521 86% |
| f) Personal video recorder % of yes | n = 2368 33% | n = 0 | n = 2368 33% | n = 763 16% ↑ | n = 773 35% ↓ | n = 763 41% ↑ | n = 728 41% ↓ |
| g) Specialized movie network (Pay TV or free) % of yes | n = 2970 43% | n = 0 | n = 2970 43% | n = 755 50% ↑ | n = 765 42% | n = 745 40% | n = 705 36% ↓ |
| d) PAID content from your local cable or satellite provider via video on demand % of yes | n = 2368 45% | n = 0 | n = 2368 45% | n = 756 40% ↓ | n = 560 42% | n = 534 51% ↑ | n = 518 44% |
| b) Netflix subscription % of yes | n = 2368 33% | n = 0 | n = 2368 33% | n = 763 16% ↓ | n = 773 35% | n = 763 41% ↑ | n = 728 41% ↑ |
| c) Online digital media service where you can buy or rent films % of yes | n = 2335 23% | n = 0 | n = 2335 23% | n = 745 19% ↓ | n = 556 25% | n = 525 25% | n = 509 20% |
| e) Club Illico unlimited % of yes | n = 753 15% | n = 0 | n = 753 15% | n = 753 | n = 0 | n = 0 | n = 0 |

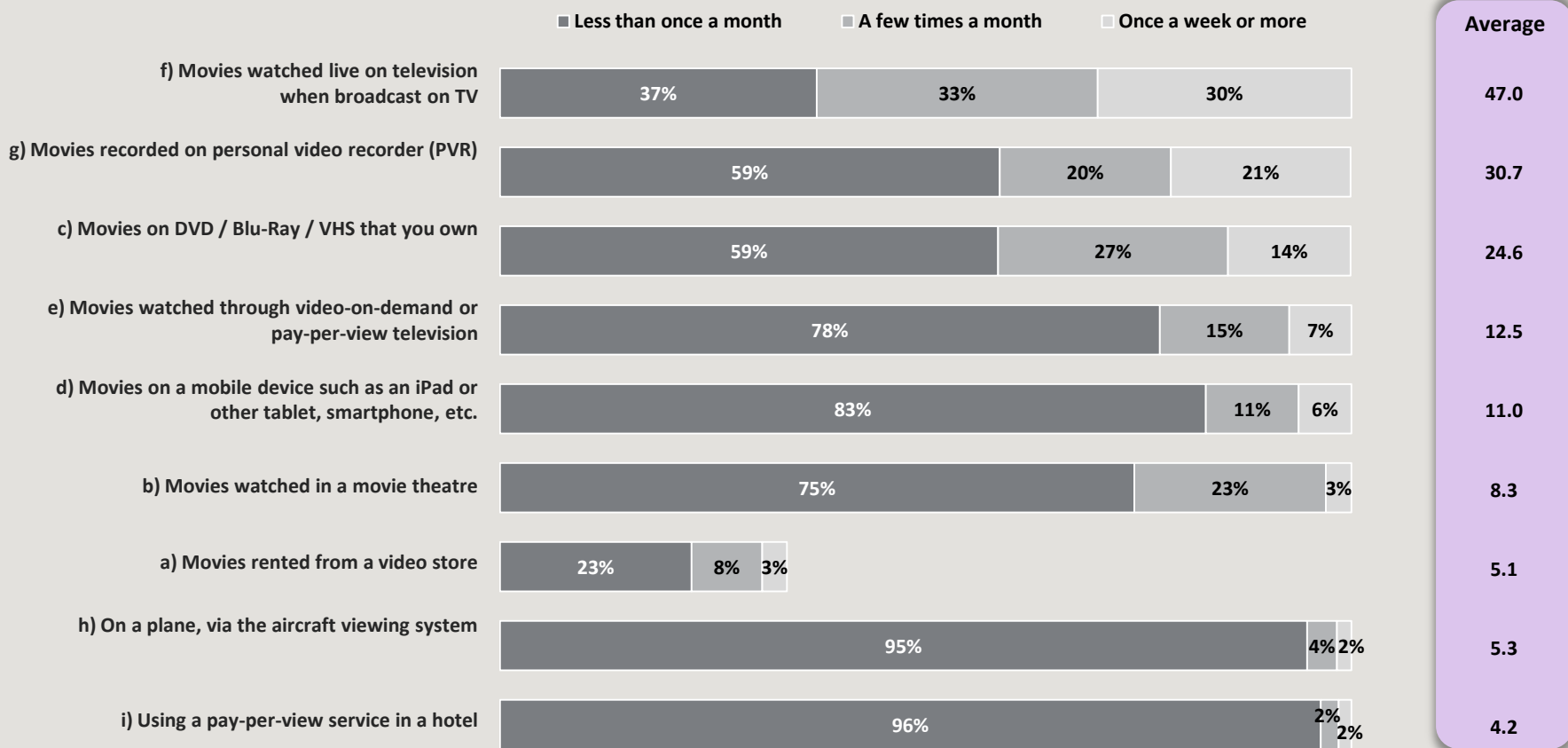
Subscription services (cont'd)

QA8. Among the following services, which do you subscribe to or do you use regularly to watch movies?

| | Total 2014 | Age | | | | Region / Language spoken | |
|--|-----------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| a) Cable or satellite service % of yes | n = 2384 86% | n = 109 80% ↓ | n = 571 74% ↓ | n = 878 88% ↑ | n = 826 95% ↑ | n = 652 93% ↑ | n = 1732 85% ↓ |
| f) Personal video recorder % of yes | n = 2382 50% | n = 105 24% ↓ | n = 574 44% ↓ | n = 877 53% ↑ | n = 826 53% ↑ | n = 651 57% ↑ | n = 1731 48% ↓ |
| g) Specialized movie network (Pay TV or free) % of yes | n = 2339 44% | n = 103 50% | n = 567 35% ↓ | n = 859 49% ↑ | n = 840 47% ↑ | n = 644 55% ↑ | n = 1695 42% ↓ |
| d) PAID content from your local cable or satellite provider via video on demand % of yes | n = 2368 45% | n = 101 45% | n = 573 41% ↓ | n = 869 48% ↑ | n = 825 44% | n = 648 41% ↑ | n = 1720 46% ↓ |
| b) Netflix subscription % of yes | n = 2368 33% | n = 110 48% ↑ | n = 569 46% ↑ | n = 869 36% ↑ | n = 820 18% ↓ | n = 644 13% | n = 1724 38% ↑ |
| c) Online digital media service where you can buy or rent films % of yes | n = 2335 23% | n = 106 46% ↑ | n = 562 33% ↑ | n = 859 23% | n = 808 13% ↓ | n = 636 18% | n = 1699 25% ↑ |
| e) Club Illico unlimited % of yes | n = 753 15% | n = 27 4% | n = 208 16% | n = 260 15% | n = 258 15% | n = 645 16% | n = 108 10% |

Movie-watching modes

QA9. Nowadays, it is possible to watch movies in different places and on various technological platforms. How often would you say you have watched the following in the past year?



Movie-watching modes (cont'd)

QA9. Nowadays, it is possible to watch movies in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total | | Region | | | |
|--|---------------|---------------|---------------|---------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| f) Movies watched live on television when broadcast on TV | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 38% | 37% | 36% | 36% | 38% | 43% |
| A few times a month | 31% | 33% | 30% ↓ | 34% | 36% | 30% |
| Once a week or more | 32% | 30% | 34% ↑ | 31% | 26% ↓ | 27% |
| AVERAGE: | 53.1 ↑ | 47.0 ↓ | 52.0 ↑ | 48.4 | 42.7 | 41.8 |
| g) Movies recorded on your personal video recorder | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 62% ↑ | 59% ↓ | 57% | 65% ↑ | 51% ↓ | 65% ↑ |
| A few times a month | 18% | 20% | 19% | 17% ↓ | 25% ↑ | 19% |
| Once a week or more | 20% | 21% | 25% ↑ | 18% ↓ | 24% | 17% ↓ |
| AVERAGE: | 32.3 | 30.7 | 34.1 | 26.6 ↓ | 34.6 | 24.6 ↓ |
| c) Movies on DVD / Blu-Ray / VHS that you own | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 53% ↓ | 59% ↑ | 68% ↑ | 55% ↓ | 54% ↓ | 69% ↑ |
| A few times a month | 29% | 27% | 20% ↓ | 29% | 31% ↑ | 23% ↓ |
| Once a week or more | 19% ↑ | 14% ↓ | 12% ↓ | 17% ↑ | 16% | 8% ↓ |
| AVERAGE: | 30.6 ↑ | 24.6 ↓ | 20.3 ↓ | 26.3 | 27.6 | 16.7 ↓ |

Movie-watching modes (cont'd)

QA9. Nowadays, it is possible to watch movies in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total 2014 | Age | | | | Region / Language spoken | |
|--|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| f) Movies watched live on television when broadcast on TV | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 37% | 34% | 45% ↑ | 33% ↓ | 36% | 36% | 38% |
| A few times a month | 33% | 30% | 34% | 36% ↑ | 29% ↓ | 30% | 34% |
| Once a week or more | 30% | 37% | 21% ↓ | 31% | 35% ↑ | 34% ↑ | 29% ↓ |
| AVERAGE: | 47.0 | 63.7 ↑ | 33.3 ↓ | 46.3 | 56.6 ↑ | 53.1 ↑ | 45.5 ↓ |
| g) Movies recorded on your personal video recorder | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 59% | 70% ↑ | 60% | 55% ↓ | 60% | 57% | 59% |
| A few times a month | 20% | 13% | 22% | 23% ↑ | 17% ↓ | 20% | 20% |
| Once a week or more | 21% | 17% | 18% ↓ | 22% | 23% | 23% | 21% |
| AVERAGE: | 30.7 | 22.0 | 27.4 | 33.8 | 31.2 | 32.8 | 30.1 |
| c) Movies on DVD / Blu-Ray / VHS that you own | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 59% | 45% ↓ | 53% ↓ | 53% ↓ | 70% ↑ | 69% ↑ | 56% ↓ |
| A few times a month | 27% | 37% ↑ | 31% ↑ | 30% ↑ | 19% ↓ | 20% ↓ | 29% ↑ |
| Once a week or more | 14% | 18% | 16% | 17% ↑ | 11% ↓ | 11% ↓ | 15% ↑ |
| AVERAGE: | 24.6 | 35.4 | 27.9 | 26.5 | 18.2 ↓ | 19.3 ↓ | 25.9 ↑ |

Movie-watching modes (cont'd)

QA9. Nowadays, it is possible to watch movies in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total | | Region | | | |
|---|---------------|---------------|--------------|-------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| e) Movies watched through video-on-demand or pay-per-view television | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 72% ↓ | 78% ↑ | 74% ↓ | 78% | 78% | 84% ↑ |
| A few times a month | 16% ↑ | 15% ↓ | 16% | 16% | 13% | 13% |
| Once a week or more | 12% ↑ | 7% ↓ | 9% ↑ | 6% | 8% | 4% ↓ |
| AVERAGE: | 21.1 ↑ | 12.5 ↓ | 13.0 | 12.0 | 13.9 | 7.4 |
| d) Movies on a mobile device such as an iPad or other tablet, etc. | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 80% ↓ | 83% ↑ | 87% ↑ | 84% | 78% | 85% |
| A few times a month | 11% ↑ | 11% ↓ | 7% ↓ | 11% | 15% ↑ | 9% |
| Once a week or more | 9% ↑ | 6% ↓ | 6% | 6% | 8% | 6% |
| AVERAGE: | 14.2 ↑ | 11.0 ↓ | 9.1 ↑ | 9.6 | 14.7 | 9.1 |
| b) Movies watched in a movie theatre | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 70% ↓ | 75% ↑ | 79% ↑ | 72% ↓ | 73% | 81% ↑ |
| A few times a month | 25% ↑ | 23% ↓ | 20% | 25% | 23% | 17% ↓ |
| Once a week or more | 5% ↑ | 3% ↓ | 2% | 3% | 4% | 3% |
| AVERAGE: | 10.9 ↓ | 8.3 ↓ | 6.4 ↓ | 8.6 | 9.9 | 6.7 |

Movie-watching modes (cont'd)

QA9. Nowadays, it is possible to watch movies in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total 2014 | Age | | | | Region / Language spoken | |
|---|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| e) Movies watched through video-on-demand or pay-per-view television | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 78% | 58% ↓ | 72% ↓ | 78% | 85% ↑ | 74% ↓ | 79% ↑ |
| A few times a month | 15% | 28% ↑ | 19% ↑ | 15% | 10% ↓ | 17% | 15% |
| Once a week or more | 7% | 14% ↑ | 9% ↓ | 7% | 5% ↓ | 10% ↑ | 7% ↓ |
| AVERAGE: | 12.5 | 18.8 | 16.5 ↑ | 12.3 | 8.6 ↓ | 13.1 | 12.3 |
| d) Movies on a mobile device such as an iPad or other tablet, etc. | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 83% | 55% ↓ | 74% ↓ | 82% | 96% ↑ | 88% ↑ | 82% ↓ |
| A few times a month | 11% | 26% ↑ | 17% ↑ | 12% | 3% ↓ | 7% ↓ | 12% ↑ |
| Once a week or more | 6% | 19% ↑ | 10% ↑ | 6% | 1% ↓ | 5% | 7% |
| AVERAGE: | 11.0 | 46.9 ↑ | 17.6 ↑ | 9.6 | 2.2 ↓ | 8.4 | 11.7 |
| b) Movies watched in a movie theatre | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 75% | 64% ↓ | 67% ↓ | 78% | 79% ↑ | 80% ↑ | 73% ↓ |
| A few times a month | 23% | 33% ↑ | 29% ↑ | 20% ↓ | 19% ↓ | 19% ↓ | 24% ↑ |
| Once a week or more | 3% | 3% | 5% ↑ | 3% | 2% ↓ | 2% ↓ | 3% ↑ |
| AVERAGE: | 8.3 | 14.2 ↑ | 11.2 ↑ | 7.4 ↓ | 6.2 ↓ | 6.2 ↓ | 8.9 ↑ |

Movie-watching modes (cont'd)

QA9. Nowadays, it is possible to watch movies in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total | | Region | | | |
|---|--------------|--------------|--------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| a) Movies rented from a video store | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 84% ↓ | 89% ↑ | 82% ↓ | 93% ↑ | 89% | 92% |
| A few times a month | 11% ↑ | 8% ↓ | 13% ↑ | 6% ↓ | 8% | 6% |
| Once a week or more | 5% ↑ | 3% ↓ | 5% ↑ | 1% ↓ | 3% | 2% |
| AVERAGE: | 8.9 ↑ | 5.1 ↓ | 6.8 ↑ | 3.5 ↓ | 6.1 | 4.2 |
| h) On a plane, via the aircraft viewing system | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 95% | 95% | 97% ↑ | 94% | 94% | 97% ↑ |
| A few times a month | 3% | 4% | 2% ↓ | 4% | 5% | 2% |
| Once a week or more | 1% | 2% | 1% | 2% | 2% | 1% |
| AVERAGE: | 4.0 | 5.3 | 3.7 | 6.7 | 5.5 | 2.6 ↓ |
| j) Using a pay-per-view service in a hotel | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 97% | 96% | 98% | 97% | 95% ↓ | 98% |
| A few times a month | 2% | 2% | 2% | 1% | 3% ↓ | 2% |
| Once a week or more | 1% | 2% | 1% | 2% | 2% | 0% ↓ |
| AVERAGE: | 2.4 ↓ | 4.2 ↑ | 1.8 ↓ | 5.9 | 4.7 | 1.5 ↓ |

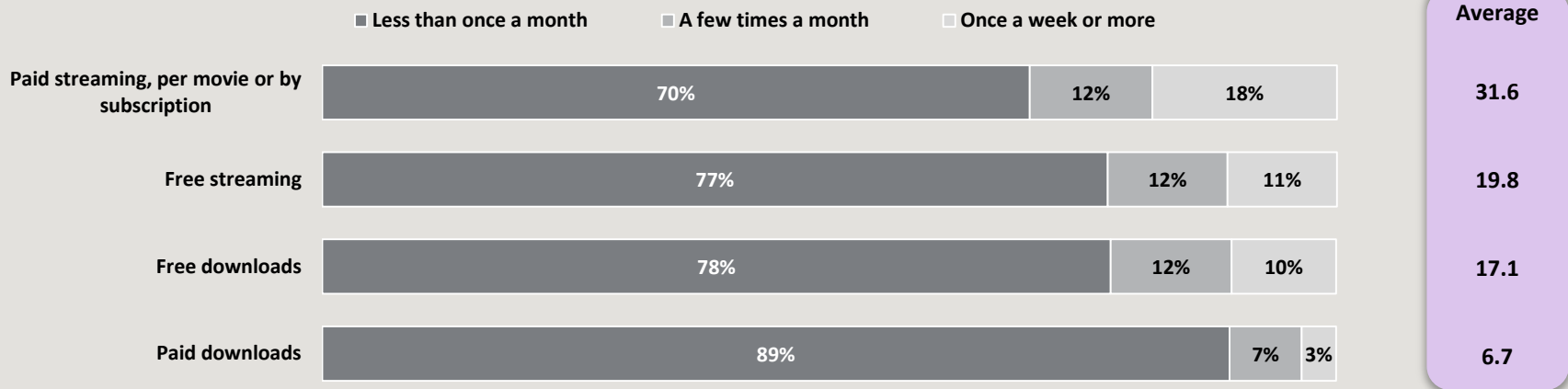
Movie-watching modes (cont'd)

QA9. Nowadays, it is possible to watch movies in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total 2014 | Age | | | | Region / Language spoken | |
|---|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| a) Movies rented from a video store | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 89% | 86% | 87% | 86% ↓ | 94% ↑ | 81% ↓ | 91% ↑ |
| A few times a month | 8% | 12% | 10% | 10% ↑ | 5% ↓ | 14% ↑ | 7% ↓ |
| Once a week or more | 3% | 2% | 3% | 5% ↑ | 1% ↓ | 6% ↑ | 2% ↓ |
| AVERAGE: | 5.1 | 5.6 | 5.6 | 6.6 ↑ | 3.2 ↓ | 7.5 ↑ | 4.5 ↓ |
| h) On a plane, via the aircraft viewing system | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 95% | 93% | 92% ↓ | 95% | 97% ↑ | 97% ↑ | 94% ↓ |
| A few times a month | 4% | 5% | 5% ↑ | 3% | 3% | 2% ↓ | 4% ↑ |
| Once a week or more | 2% | 2% | 3% ↑ | 2% | 1% ↓ | 2% | 2% |
| AVERAGE: | 5.3 | 4.9 | 7.1 | 5.4 | 3.9 | 4.0 | 5.7 |
| j) Using a pay-per-view service in a hotel | n = 2404 | n = 114 | n = 577 | n = 880 | n = 833 | n = 657 | n = 1747 |
| Less than once a month | 96% | 90% ↓ | 94% ↓ | 96% | 99% ↑ | 98% ↑ | 96% ↓ |
| A few times a month | 2% | 8% ↑ | 4% ↑ | 2% | 0% ↓ | 1% | 2% |
| Once a week or more | 2% | 2% | 2% ↑ | 2% | 0% ↓ | 1% ↓ | 2% ↑ |
| AVERAGE: | 4.2 | 4.3 | 6.5 | 5.0 | 1.5 ↓ | 2.0 ↓ | 4.8 ↑ |

Online content acquisition methods

QA10. How often would you say you have used the following in the past year?



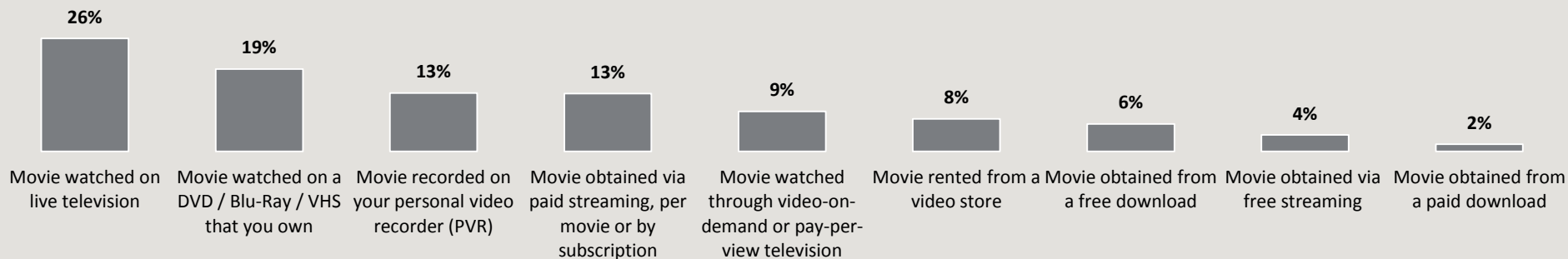
Online content acquisition methods (cont'd)

QA10. How often would you say you have used the following in the past year?

| | Total | | Region | | | |
|--|---------------|---------------|---------------|-------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| c) Paid streaming, per movie or by subscription | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 72% | 70% | 82% ↑ | 69% | 62% ↓ | 69% |
| A few times a month | 12% | 12% | 8% ↓ | 13% | 14% ↑ | 11% |
| Once a week or more | 17% | 18% | 10% ↓ | 18% | 24% ↑ | 21% |
| AVERAGE: | 30.0 | 31.6 | 19.0 ↓ | 30.9 | 40.7 ↑ | 38.6 |
| d) Free streaming (live streaming through Tou.tv, etc.) | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 75% | 77% | 74% ↓ | 80% ↑ | 75% | 83% ↑ |
| A few times a month | 12% | 12% | 12% | 10% | 14% | 10% |
| Once a week or more | 13% ↑ | 11% ↓ | 14% ↑ | 9% | 11% | 7% ↓ |
| AVERAGE: | 24.3 ↑ | 19.8 ↓ | 24.9 ↑ | 16.9 | 21.1 | 13.2 ↓ |
| b) Free downloads (e.g.: Torrent file sites) | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 78% | 78% | 81% | 76% ↓ | 76% | 79% |
| A few times a month | 10% ↓ | 12% ↑ | 9% ↓ | 14% ↑ | 12% | 10% |
| Once a week or more | 13% ↑ | 10% ↓ | 9% | 10% | 12% | 10% |
| AVERAGE: | 20.5 ↑ | 17.1 ↓ | 18.5 | 12.8 | 21.5 | 17.0 |
| a) Paid downloads (e.g.: iTunes and Amazon) | n = 1800 | n = 2404 | n = 769 | n = 571 | n = 538 | n = 526 |
| Less than once a month | 90% | 89% | 94% ↑ | 90% | 85% ↓ | 92% ↑ |
| A few times a month | 7% | 7% | 5% | 6% | 10% ↑ | 6% |
| Once a week or more | 3% | 3% | 1% ↓ | 4% | 5% ↑ | 2% |
| AVERAGE: | 5.4 | 6.7 | 2.8 ↓ | 6.3 | 11.3 ↑ | 3.4 ↓ |

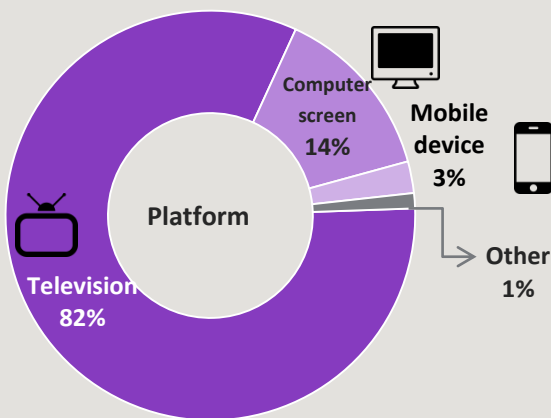
Last movie watched

QA11. How did you go about acquiring the last movie you watched specifically at home?



Analysing the last movie watched by respondents reveals a brand new trend in content watching. The chart above shows that live viewing on TV is still the most popular mode for watching films (with an average of 26%). **However, this movie-watching mode is in fierce competition with several others.** The chart below shows that television is still the preferred screen for many viewers, which confirms findings in the qualitative section of the project. Viewers especially appreciate being able to watch movies on their large screens from the comfort of their favourite chair. **Regular television just isn't the clearly preferred means for watching features it once was.**

QA12. And on which of the following platforms did you watch it?



Online content acquisition methods

QA10. How often would you say you have used the following in the past year?

| | Total 2014 | Age | | | | Region / Language spoken | |
|--|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| c) Paid streaming, per movie or by subscription | n = 2404 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| Less than once a month | 70% | 52% ↓ | 55% ↓ | 67% ↓ | 87% ↑ | 84% ↑ | 66% ↓ |
| A few times a month | 12% | 23% ↑ | 18% ↑ | 13% | 4% ↓ | 7% ↓ | 13% ↑ |
| Once a week or more | 18% | 25% | 27% ↑ | 20% | 9% ↓ | 8% ↓ | 21% ↑ |
| AVERAGE: | 31.6 | 35.6 | 49.9 ↑ | 29.8 | 18.2 ↓ | 14.2 ↓ | 36.1 ↑ |
| d) Free streaming (live streaming through Tou.tv, etc.) | n = 2404 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| Less than once a month | 77% | 51% | 63% ↓ | 79% | 91% ↑ | 74% | 78% |
| A few times a month | 12% | 26% ↑ | 19% ↑ | 12% | 5% ↓ | 13% | 12% |
| Once a week or more | 11% | 24% ↑ | 19% ↑ | 9% | 4% ↓ | 13% | 10% |
| AVERAGE: | 19.8 | 44.9 ↑ | 36.3 ↑ | 16.6 ↓ | 6.5 ↓ | 23.8 | 18.8 |
| b) Free downloads (e.g.: Torrent file sites) | n = 2404 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| Less than once a month | 78% | 64% ↓ | 66% ↓ | 80% | 87% ↑ | 82% ↑ | 77% ↓ |
| A few times a month | 12% | 27% ↑ | 17% ↑ | 11% | 6% ↓ | 9% ↓ | 13% ↑ |
| Once a week or more | 10% | 10% | 17% ↑ | 9% | 7% ↓ | 9% | 11% |
| AVERAGE: | 17.1 | 23.0 | 30.6 ↑ | 13.5 ↓ | 9.3 ↓ | 17.8 | 16.9 |
| a) Paid downloads (e.g.: iTunes and Amazon) | n = 2404 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| Less than once a month | 89% | 75% ↓ | 82% ↓ | 91% | 96% ↑ | 94% ↑ | 88% ↓ |
| A few times a month | 7% | 22% ↑ | 11% ↑ | 7% | 2% ↓ | 6% | 8% |
| Once a week or more | 3% | 3% | 7% ↑ | 3% ↓ | 2% ↓ | 1% ↓ | 4% ↑ |
| AVERAGE: | 6.7 | 5.8 | 14.2 ↑ | 4.5 ↓ | 3.3 ↓ | 2.6 ↓ | 7.8 ↑ |

Last movie watched

QA11. How did you go about acquiring the last movie you watched specifically at home?

| | | Total | | Region | | | |
|------|--|----------|----------|---------|---------|----------------|-----------------|
| | | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| QA11 | Method used to watch last movie | n = 0 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| | Watched on live television | | 26% | 35% ↑ | 23% ↓ | 22% ↓ | 27% |
| | On a DVD / Blu-Ray / VHS that you own | | 19% | 14% ↓ | 24% ↑ | 17% | 16% |
| | Recorded on personal video recorder | | 13% | 14% | 12% | 15% | 12% |
| | Via paid streaming, per movie or by subscription | | 13% | 5% ↓ | 15% | 17% ↑ | 15% |
| | Watched through video-on-demand or pay-per-view television | | 9% | 11% | 7% ↓ | 11% ↑ | 8% |
| | Rented from a video store | | 8% | 11% ↑ | 7% | 6% | 6% |
| | From a free download | | 6% | 5% | 6% | 6% | 10% ↑ |
| | Via free streaming | | 4% | 4% | 5% ↑ | 3% | 3% |
| | From a paid download | | 2% | 2% | 1% | 2% | 2% |
| QA12 | Platform used to watch last movie | n = 1800 | n = 3055 | n = 771 | n = 784 | n = 769 | n = 731 |
| | On television | 81% | 82% | 87% ↑ | 80% ↓ | 82% | 81% |
| | On a computer screen or a TV screen linked to a computer | 15% | 14% | 10% ↓ | 16% ↑ | 14% | 14% |
| | On a mobile device such as an iPad or any other tablet, smartphone, etc. | 2% | 3% | 2% | 3% | 2% | 3% |
| | Other | 1% | 1% | 1% ↓ | 1% | 2% | 1% |
| | DNK/DNA | 1% ↑ | 0% ↓ | 0% | 0% | 0% | 0% |

Last movie watched (cont'd)

QA11. How did you go about acquiring the last movie you watched specifically at home?

QA12. And on which of the following platforms did you watch it?

| | Total 2014 | Age | | | | Region / Language spoken | |
|--|---------------|--------------------------|--------------------------|--------------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| QA11 Method used to watch last movie | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| Watched on live television | 26% | 22% | 14% ↓ | 23% ↓ | 39% ↑ | 36% ↑ | 23% ↓ |
| On a DVD / Blu-Ray / VHS that you own | 19% | 15% | 20% | 21% ↑ | 16% ↓ | 13% ↓ | 21% ↑ |
| Recorded on personal video recorder | 13% | 5% ↓ | 8% ↓ | 15% ↑ | 17% ↑ | 14% | 13% |
| Via paid streaming, per movie or by subscription | 13% | 12% | 21% ↑ | 12% | 9% ↓ | 5% ↓ | 16% ↑ |
| Watched through video-on-demand or pay-per-view television | 9% | 3% ↓ | 11% ↑ | 10% | 8% | 11% ↑ | 9% ↓ |
| Rented from a video store | 8% | 9% | 6% | 9% ↑ | 7% | 12% ↑ | 6% ↓ |
| From a free download | 6% | 11% ↑ | 12% ↑ | 5% ↓ | 3% ↓ | 5% | 7% |
| Via free streaming | 4% | 19% ↑ | 6% ↑ | 3% | 1% ↓ | 3% | 4% |
| From a paid download | 2% | 4% | 3% ↑ | 2% | 1% ↓ | 2% | 2% |
| QA12 Platform used to watch last movie | n = 3055 | n = 114 | n = 755 | n = 1107 | n = 1079 | n = 659 | n = 2396 |
| On television | 82% | 59% ↓ | 70% ↓ | 86% ↑ | 92% ↑ | 89% ↑ | 81% ↓ |
| On a computer screen or a TV screen linked to a computer | 14% | 30% ↑ | 25% ↑ | 11% ↓ | 6% ↓ | 9% ↓ | 15% ↑ |
| On a mobile device such as an iPad or any other tablet, smartphone, etc. | 3% | 9% ↑ | 3% | 2% | 1% ↓ | 2% | 3% |
| Other | 1% | 2% | 2% ↑ | 0% ↓ | 1% | 1% | 1% |
| DNK/DNA | 0% ↓ | 0% | 0% | 0% | 0% | 0% | 0% |

Viewer habits – SERIES SECTION



SERIES ARE QUICKLY BECOMING A FAVOURITE WITH CANADIAN VIEWERS

- A new section dedicated to series was added to the questionnaire this year.
- **When asked about their series-watching habits compared to a year ago**, approximately one quarter (24%) of Canadians report watching more of them, which is 6% more than those who say they watch less (18%). Here are the four main reasons that explain this situation:
 - **More spare time/More interested:** As is the case with movies, more than half (55%) of the Canadians who report watching more series than they did a year ago say they have more spare time to enjoy or more interest in this type of content. Some 19% of respondents claim that with the greater variety on offer today, there are bound to be more series that pique their interest.
 - **Better quality and wider selection of series:** In parallel with the previous reason, a good number (26%) of respondents explain their increased consumption with the fact that they now have access to a wider selection of better quality series.
 - **Access to series, sources or platforms:** Some 17% of Canadians surveyed report having easier access to series. While that access is financial in nature for some, others say they get it through new platforms and TV subscription services.
 - **Preference for digital viewing:** The impact of Netflix is also felt here with 10% of respondents mentioning the video-streaming giant as the reason for their increased series consumption.
- Also, the fact that the increase in series consumption is more pronounced in the younger segments (34% for 15- to 17-year-olds, 31% for 18- to 34-year-olds, 21% for 35- to 54-year-olds and 20% for those 55 and older) should be highlighted.
- There is a minority (18%) of respondents who say they watch less series than a year ago. According to half of them, **this decrease in consumption is mainly due to a lack of spare time** (because they're extremely busy at work or with school, or they just had a baby, for example), which is in line with the reasons given by respondents for watching less movies.



Series viewing habits

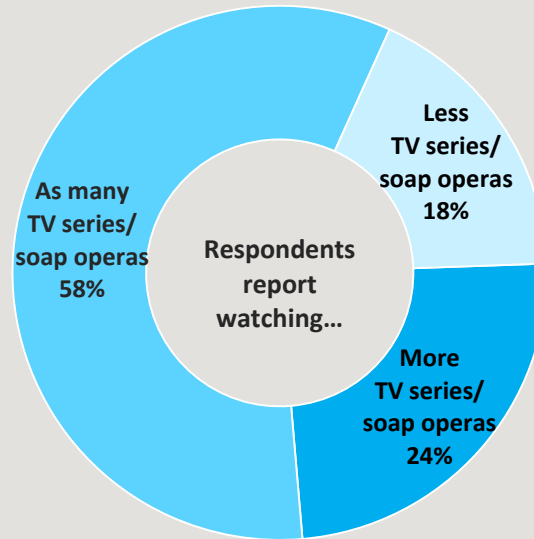
QB2. More specifically, how many episodes of a TV series / soap opera have you watched in the past month?

| | Total n = 2241 | Region | | | |
|-----------------------|-------------------|-------------------|--------------------|---------------------------|----------------------------|
| | | Quebec n = 590 | Ontario n = 584 | Western Canada n = 553 | Atlantic Canada n = 514 |
| 1 to 10 episodes | 47% | 49% | 47% | 48% | 44% |
| 10 to 21 episodes | 38% | 37% | 38% | 38% | 40% |
| More than 21 episodes | 15% | 14% | 16% | 15% | 16% |
| AVERAGE: | 20.3 | 17.9 ↓ | 21.1 | 20.8 | 22.3 |

| | Total n = 2241 | Age | | | | Region / Language spoken | |
|-----------------------|-------------------|------------------------------|-------------------------------|-------------------------------|----------------------------------|-----------------------------------|---|
| | | 15 to 17 years old n = 78 | 18 to 34 years old n = 590 | 35 to 54 years old n = 817 | 55 years old and over n = 756 | French-speaking Quebec n = 508 | English-speaking / Rest of French-speaking Canada n = 1733 |
| 1 to 10 episodes | 47% | 44% | 46% | 50% | 46% | 50% | 47% |
| 10 to 21 episodes | 38% | 42% | 37% | 37% | 40% | 38% | 38% |
| More than 21 episodes | 15% | 14% | 17% ↑ | 14% | 14% | 12% | 15% |
| AVERAGE: | 20.3 | 24.1 | 22.7 ↑ | 19.2 | 18.9 | 16.5 ↓ | 21.3 ↑ |

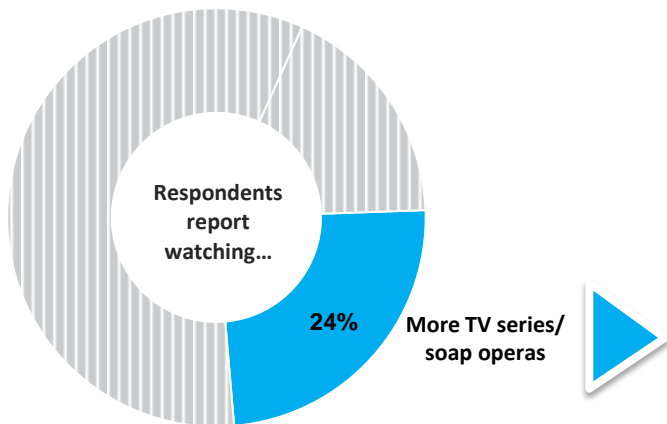
Series-watching trends

QB3. Compared to a year ago, would you say that you watch...



Number of series watched in the past month

QB3. Compared to a year ago, would you say that you watch...



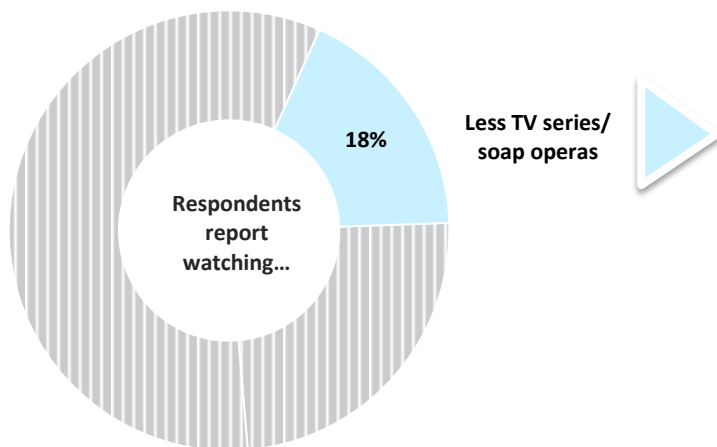
| QB4 Why watch more TV series / soap operas | Total n = 640 |
|--|------------------|
| SUBTOTAL: More interested / more spare time | 55% |
| More series appeal to me / are in my field of interest | 19% |
| More spare time / less busy | 18% |
| Don't go out / go out less often / at home more often | 8% |
| For one series in particular / for specific series | 3% |
| The weather / time of year (example: winter) | 3% |
| Illness / on sick leave / health issues | 3% |
| It's fun / entertaining | 3% |
| Retired | 2% |
| Work less / new schedule | 2% |
| Not working at the moment / work stoppage | 2% |
| Fan of series / series buff / like series | 2% |
| SUBTOTAL: Better quality / selection of TV series | 26% |
| Better quality of series | 9% |
| New series / seasons | 7% |
| Better selection of series / better series available | 5% |
| More options available / more series to watch | 5% |
| Better quality programming / TV content | 3% |
| Like content / good stories / plot lines | 2% |
| SUBTOTAL: Access (to TV series, sources or platforms) / Less expensive option for entertainment | 17% |
| PVR / Have personal video recorder | 4% |
| Easier access to series | 4% |
| Have / got cable | 3% |
| Watch more / a lot of television | 2% |
| Subscribed to new / more channels | 2% |
| Recorder (non-specified) / record series | 2% |
| SUBTOTAL: Prefer digital viewing | 12% |
| Netflix / Netflix membership | 10% |
| More options available online (streaming, etc.) | 2% |
| SUBTOTAL: Shorter episodes can be watched anytime without ads | 6% |
| Can watch series / episodes when I want / it's convenient | 3% |
| SUBTOTAL: Influence of family / friends | 3% |
| Watch with friend / spouse / family who also want(s) to watch | 3% |
| DNK/DNA | 4% |

Base: Respondents who report watching *series at least once a year* (n = 2865).

Note: Reasons given by less than 2% of respondents are not presented in this chart.

Number of series watched in the past month (cont'd)

QB3. Compared to a year ago, would you say that you watch...



| QB4 Why watch less TV series / soap operas | Total n = 470 |
|--|------------------|
| SUBTOTAL: Less interested / less spare time | 60% |
| Not enough time / too busy | 35% |
| No interest / not interested / less interested | 10% |
| Have other activities / hobbies (reading, etc.) | 7% |
| Work more / too busy with work | 6% |
| Have children / had a baby | 5% |
| Too busy with school | 3% |
| Prefer other types of shows (sports, news, documentaries, etc.) | 3% |
| SUBTOTAL: Low-quality / poor selection of series / inadequate content | 23% |
| Less series are interesting / poor selection | 15% |
| Poor quality of series | 5% |
| Don't like content / bad stories / plot lines | 3% |
| Not original / repetitive / always the same kind of story | 2% |
| Poor quality programming / TV content | 2% |
| SUBTOTAL: Less interest in watching series live on TV (not enough variety / schedule doesn't work / too many ads) | 9% |
| Watch less television | 8% |
| SUBTOTAL: Lack of access (to series, sources or platforms) / expensive | 8% |
| No longer have cable | 3% |
| Series cancellations / certain series were cancelled | 2% |
| SUBTOTAL: Prefer movies | 2% |
| Watch movies / watch more movies than series | 2% |
| SUBTOTAL: Other | 8% |
| Series followed are finished / over | 2% |
| Internet doesn't work well / connection issues | 2% |
| DNK/DNA | 4% |

Base: Respondents who report watching *series* at least once a year (n = 2865)

Note: Reasons given by less than 2% of respondents are not presented in this chart.

Series-watching trends

QB3. Compared to a year ago, would you say that you watch...

| | Total n = 2865 | Region | | | |
|---------------------------------|-------------------|-------------------|--------------------|---------------------------|----------------------------|
| | | Quebec n = 725 | Ontario n = 745 | Western Canada n = 730 | Atlantic Canada n = 665 |
| More TV series / soap operas | 24% | 23% | 25% | 25% | 22% |
| As many TV series / soap operas | 58% | 62% ↑ | 56% | 58% | 60% |
| Less TV series / soap operas | 18% | 15% ↓ | 19% | 18% | 18% |

| | Total n = 2865 | Age | | | | Region / Language spoken | |
|---------------------------------|-------------------|----------------------------------|----------------------------------|-----------------------------------|-------------------------------------|--------------------------------------|--|
| | | 15 to 17 years old n = 109 | 18 to 34 years old n = 731 | 35 to 54 years old n = 1049 | 55 years old and over n = 976 | French-speaking Quebec n = 622 | English-speaking / Rest of French- speaking Canada n = 2243 |
| More TV series / soap operas | 24% | 34% ↑ | 31% ↑ | 21% ↓ | 20% ↓ | 23% | 25% |
| As many TV series / soap operas | 58% | 37% ↓ | 50% ↓ | 61% ↑ | 65% ↑ | 62% ↑ | 57% ↓ |
| Less TV series / soap operas | 18% | 29% ↑ | 19% | 18% | 15% ↓ | 15% ↓ | 18% ↑ |

THERE ARE SIGNIFICANT DIFFERENCES BETWEEN FRENCH-SPEAKING QUEBECERS AND ENGLISH-SPEAKING CANADIANS WHEN IT COMES TO SERIES-WATCHING HABITS

■ As was the case with feature films, English-speaking Canadians and French-speaking Quebecers don't watch series in the same language:

- On the one hand, **English-speaking Canadians watch their series almost exclusively in English**. On average, 96% of the series they watch are in English and 91% of them watch 100% of their content in that language. Three times as many consumers in this segment watch series in a foreign language than French-speaking Quebecers (3% compared to 1%).
- On the other hand, **French-speaking Quebecers watch most of their series in French**. An average of 82% of the series they watch are in French, which is a slightly bigger proportion than the one reported for movies (80%). Two out of three (66%) French-speaking Quebecers say they watch series exclusively in their language.

■ **With an average consumption frequency of 125 times in the past year, live viewing on TV is still the preferred mode for watching series.**

- Using this viewing mode for watching series is more popular with French-speaking Quebecers (140 times compared to 122 times for English-speaking Canadians).

■ **The personal video recorder is also a popular viewing mode for watching series** with an average consumption frequency of 85 times in the past year. It should be noted the qualitative section of this study revealed that many people opt for “delayed live” viewing, meaning they record an episode to watch it a few minutes after it starts so they can skip commercials.

■ Other viewing platforms available are significantly less popular with average consumption frequencies below 16 times a year. That being said, a few differences in use between French-speaking Quebecers and English-speaking Canadians should be highlighted:

- Video-on-demand and pay-per-view TV services are much more popular with French-speaking Quebecers (25 times per year compared to 14 times per year for English-speaking Canadians).
- Watching series on a mobile device is over-represented with English-speaking Canadians (14 times per year compared to 8 times per year for French-speaking Quebecers).
- Renting series from video stores is the least popular way for Canadians to watch them (done an average of 6 times in the past year). However, this practice is slightly more common with English-speaking Canadians (7 times per year compared to 2 times per year for French-speaking Quebecers).

LIVE VIEWING ON TV IS MUCH MORE POPULAR FOR SERIES THAN FOR MOVIES

- Some 29% of Canadians surveyed (38% for French-speaking Quebecers and 27% for English-speaking Canadians) report they watch **movies live on TV** once a week. **The numbers are completely different when it comes to series.** Based on the number of respondents who report watching at least one series episode in the past year (a whopping 94% of the sample), **live viewing of series on TV happens at least once a week for nearly two out of three (63%) consumers.** Consequently, the bond that Canadian viewers entertain with series is much stronger than the one they share with movies.
- This behaviour is similar across many socio-demographic variables, including age groups and language spoken. However, live viewing of series on TV is slightly more common with age and for French-speaking Quebecers.

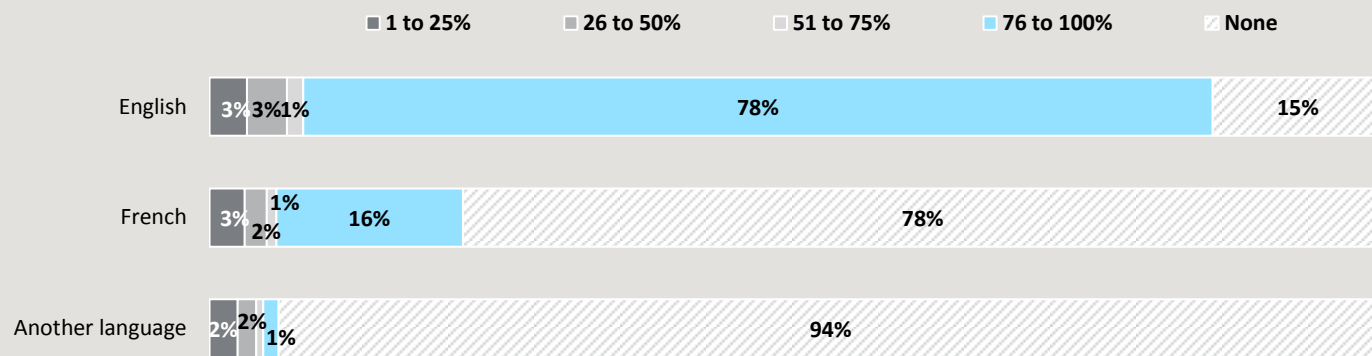
STREAMING AND DOWNLOADING ARE POPULAR CHOICES FOR WATCHING SERIES



- **Online platforms are pretty popular when it comes to series-watching habits.** In fact, these viewing modes are used as often for watching series as they are for watching films.
- **Paid streaming by episode or by subscription ranks first**, having been used by nearly two out of 10 (18%) respondents at least once a week, especially by English-speaking Canadians (20% compared to 8% for French-speaking Quebecers). Furthermore, English-speaking Canadians report using paid streaming a lot more often than French-speaking Quebecers (38 times per year compared to 16 times per year).
- **Free streaming ranks second**, having been used an average of 25 times in the past year and at least once a week by 14% of respondents. It is interesting to note, however, that this viewing mode is a lot more popular with younger viewers. Those 15 to 17 years old used free streaming to watch series an average of 61 times in the past year. From there, the numbers drop progressively with 42 times for 18- to 34-year-olds, 23 times for 35- to 54-year-olds and 9 times for those 55 and older.
- **Ranking third, downloading is the least popular viewing mode for watching series** with an average consumption frequency of 18 times in the past year for free downloads and 3 times for paid downloads. It should be noted that paid downloading was used an average of four times more often by English-speaking Canadians (4 times in the past year compared to 1 time by French-speaking Quebecers).
- **Western and Atlantic Canada definitely stand out when it comes to paid downloading** with average consumption frequencies in the past year of 44 and 45 times, respectively, compared to 32 times for Ontario and just 20 times for Quebec.

General series-/soap opera-watching conditions

QB5. What proportion of the TV series / soap operas that you watch are in...



Average
80.0%
17.5%
2.6%

Percentage
74%
14%
0.5%

General series-/soap opera-watching conditions (cont'd)

QB5. What proportion of the TV series / soap operas that you watch are in...

| | Total | Region | | | |
|----------------------------|-------------|---------------|---------------|----------------|-----------------|
| | | Quebec | Ontario | Western Canada | Atlantic Canada |
| In English | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| 1 to 25% | 3% | 9% ↑ | 2% ↓ | 1% ↓ | 1% ↓ |
| 26 to 50% | 3% | 8% ↑ | 3% | 1% ↓ | 0% ↓ |
| 51 to 75% | 1% | 3% ↑ | 1% | 1% ↓ | 1% |
| 76 to 100% | 78% | 22% ↓ | 94% ↑ | 97% ↑ | 97% ↑ |
| None | 15% | 58% ↑ | 1% ↓ | 1% ↓ | 1% ↓ |
| <i>Proportion of 100%</i> | 74% | 15% ↓ | 91% ↑ | 93% ↑ | 95% ↑ |
| AVERAGE: | 80.0 | 27.6 ↓ | 95.4 ↑ | 97.2 ↑ | 98.0 ↑ |
| In French | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| 1 to 25% | 3% | 8% ↑ | 2% ↓ | 1% ↓ | 2% |
| 26 to 50% | 2% | 7% ↑ | 0% ↓ | 0% ↓ | 1% ↓ |
| 51 to 75% | 1% | 4% ↑ | 0% ↓ | 0% ↓ | 0% ↓ |
| 76 to 100% | 16% | 66% ↑ | 0% ↓ | 0% ↓ | 0% ↓ |
| None | 78% | 16% ↓ | 98% ↑ | 98% ↑ | 97% ↑ |
| <i>Proportion of 100%</i> | 14% | 57% ↑ | 0% ↓ | 0% ↓ | 0% ↓ |
| AVERAGE: | 17.5 | 71.4 ↑ | 0.6 ↓ | 0.5 ↓ | 0.8 ↓ |
| In another language | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| 1 to 25% | 2% | 2% | 3% | 3% | 2% |
| 26 to 50% | 2% | 0% ↓ | 3% ↑ | 2% | 0% ↓ |
| 51 to 75% | 1% | 0% | 1% ↑ | 0% | 0% |
| 76 to 100% | 1% | 0% ↓ | 2% ↑ | 1% | 1% |
| None | 94% | 97% ↑ | 92% ↓ | 94% | 97% ↑ |
| <i>Proportion of 100%</i> | 1% | 0.3% | 1% | 0.4% | 0.4% |
| AVERAGE: | 2.6 | 1.0 ↓ | 4.0 ↑ | 2.3 | 1.3 ↓ |

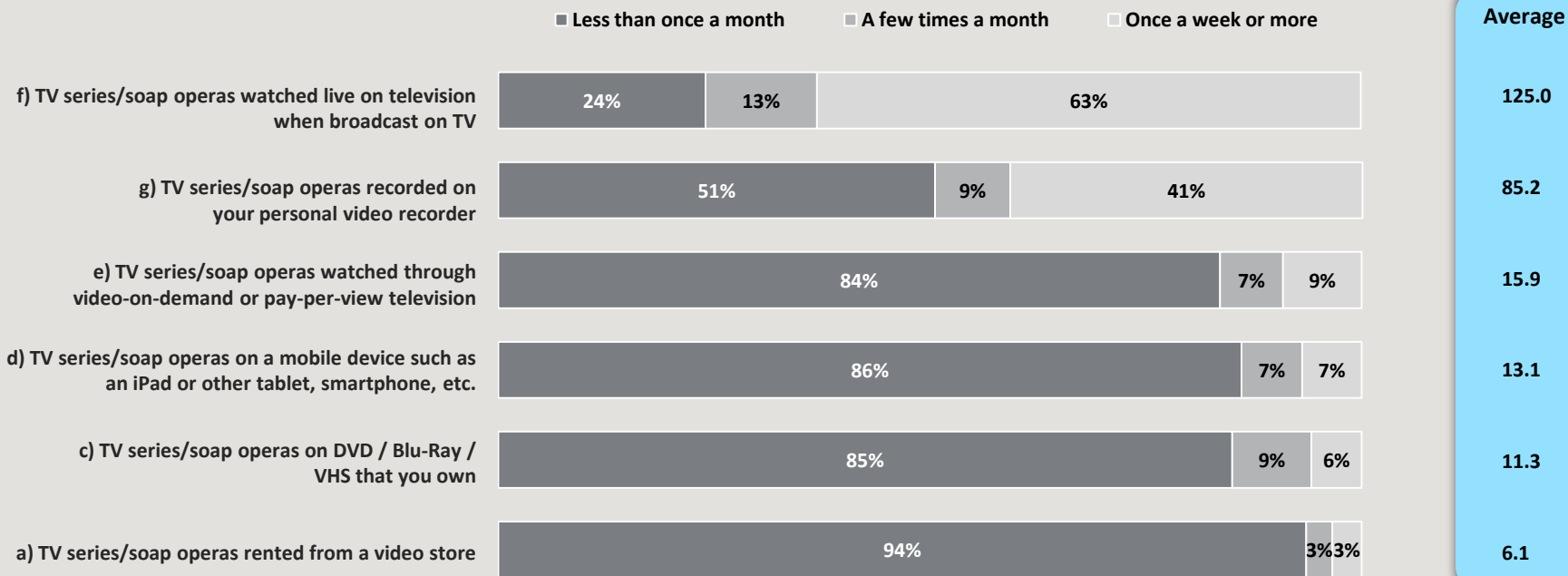
General series-/soap opera-watching conditions (cont'd)

QB5. What proportion of the TV series / soap operas that you watch are in...

| | Total | Age | | | | Region / Language spoken | |
|----------------------------|-------------|--------------------|--------------------|--------------------|-----------------------|--------------------------|---|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French-speaking Canada |
| In English | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| 1 to 25% | 3% | 9% ↑ | 3% | 3% | 3% | 10% ↑ | 1% ↓ |
| 26 to 50% | 3% | 10% ↑ | 4% | 4% | 2% ↓ | 8% ↑ | 2% ↓ |
| 51 to 75% | 1% | 4% | 2% | 1% | 1% | 3% ↑ | 1% ↓ |
| 76 to 100% | 78% | 69% ↓ | 80% | 78% | 77% | 10% ↓ | 95% ↑ |
| None | 15% | 8% ↓ | 11% ↓ | 14% | 18% ↑ | 67% ↑ | 1% ↓ |
| <i>Proportion of 100%</i> | 74% | 64% ↓ | 74% | 74% | 75% | 5% ↓ | 91% ↑ |
| AVERAGE: | 80.0 | 76.4 | 82.7 ↑ | 80.1 | 78.0 | 17.1 ↓ | 96.1 ↑ |
| In French | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| 1 to 25% | 3% | 6% | 4% ↑ | 3% | 2% ↓ | 7% ↑ | 2% ↓ |
| 26 to 50% | 2% | 4% | 2% | 2% | 1% | 7% ↑ | 0% ↓ |
| 51 to 75% | 1% | 2% | 1% | 1% | 1% | 4% ↑ | 0% ↓ |
| 76 to 100% | 16% | 9% ↓ | 12% ↓ | 16% | 20% ↑ | 76% ↑ | 0% ↓ |
| None | 78% | 80% | 80% | 80% | 76% ↓ | 5% ↓ | 97% ↑ |
| <i>Proportion of 100%</i> | 14% | 5% ↓ | 11% ↓ | 13% | 18% ↑ | 66% ↑ | 0.3% ↓ |
| AVERAGE: | 17.5 | 12.5 | 14.3 ↓ | 16.9 | 21.5 ↑ | 82.1 ↑ | 0.8 ↓ |
| In another language | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| 1 to 25% | 2% | 4% | 3% ↑ | 3% ↑ | 0% ↓ | 1% ↓ | 3% ↑ |
| 26 to 50% | 2% | 6% ↑ | 2% | 2% | 0% ↓ | 0% ↓ | 2% ↑ |
| 51 to 75% | 1% | 1% | 1% | 1% | 0% ↓ | 0% | 1% |
| 76 to 100% | 1% | 8% ↑ | 1% | 1% | 0% ↓ | 1% ↓ | 2% ↑ |
| None | 94% | 81% ↓ | 93% ↓ | 93% ↓ | 99% ↑ | 98% ↑ | 93% ↓ |
| <i>Proportion of 100%</i> | 1% | 2% ↑ | 1% | 1% | 0.1% ↓ | 0.3% | 0.6% |
| AVERAGE: | 2.6 | 11.1 ↓ | 2.9 | 3.0 | 0.5 ↓ | 0.8 ↓ | 3.0 ↑ |

Series-watching modes

QB6. Nowadays, it is possible to watch TV series / soap operas in different places and on various technological platforms. How often would you say you have watched the following in the past year?



Series-watching modes (cont'd)

QB6. Nowadays, it is possible to watch TV series / soap operas in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total | Region | | | |
|--|--------------|----------------|---------------|----------------|-----------------|
| | | Quebec | Ontario | Western Canada | Atlantic Canada |
| f) TV series / Soap operas watched live on television when broadcast on TV | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 24% | 21% ↓ | 24% | 26% | 26% |
| A few times a month | 13% | 12% | 12% | 15% ↑ | 10% ↓ |
| Once a week or more | 63% | 67% ↑ | 64% | 59% ↓ | 64% |
| AVERAGE: | 125.0 | 138.0 ↑ | 127.0 | 114.0 ↓ | 126.0 |
| g) TV series / Soap operas recorded on personal video recorder | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 51% | 48% | 58% ↑ | 43% ↓ | 53% |
| A few times a month | 9% | 8% | 9% | 10% | 8% |
| Once a week or more | 41% | 44% ↑ | 33% ↓ | 48% ↑ | 40% |
| AVERAGE: | 85.2 | 91.2 | 70.5 ↓ | 99.5 ↑ | 82.7 |
| e) TV series / Soap operas watched through video-on-demand or pay-per-view television | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 84% | 79% ↓ | 85% | 85% | 89% ↑ |
| A few times a month | 7% | 8% | 7% | 7% | 4% ↓ |
| Once a week or more | 9% | 13% ↑ | 8% | 8% | 7% |
| AVERAGE: | 15.9 | 23.1 ↑ | 13.4 ↓ | 14.1 | 12.9 |

Series-watching modes (cont'd)

QB6. Nowadays, it is possible to watch TV series / soap operas in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total | Age | | | | Region / Language spoken | |
|--|--------------|--------------------|--------------------|--------------------|-----------------------|--------------------------|---|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French-speaking Canada |
| f) TV series / Soap operas watched live on television when broadcast on TV | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 24% | 23% | 28% ↑ | 23% | 22% | 21% ↓ | 25% ↑ |
| A few times a month | 13% | 21% ↑ | 15% | 13% | 10% ↓ | 11% | 14% |
| Once a week or more | 63% | 57% | 57% ↓ | 64% | 68% ↑ | 69% ↑ | 62% ↓ |
| AVERAGE: | 125.0 | 122.0 | 109.0 ↓ | 128.0 | 138.0 ↑ | 140.0 ↑ | 122.0 ↓ |
| g) TV series / Soap operas recorded on personal video recorder | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 51% | 63% ↑ | 49% | 48% ↓ | 53% | 48% | 51% |
| A few times a month | 9% | 13% | 9% | 9% | 7% | 8% | 9% |
| Once a week or more | 41% | 24% ↓ | 42% | 43% ↑ | 40% | 45% ↑ | 40% ↓ |
| AVERAGE: | 85.2 | 43.2 ↓ | 83.8 | 93.3 ↑ | 83.6 | 90.4 | 83.9 |
| e) TV series / Soap operas watched through video-on-demand or pay-per-view television | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 84% | 73% ↓ | 78% ↓ | 83% | 91% ↑ | 77% ↓ | 85% ↑ |
| A few times a month | 7% | 12% | 11% ↑ | 7% | 4% ↓ | 9% ↑ | 7% ↓ |
| Once a week or more | 9% | 16% ↑ | 12% ↑ | 10% | 6% ↓ | 14% ↑ | 8% ↓ |
| AVERAGE: | 15.9 | 28.6 ↑ | 21.2 ↑ | 15.9 | 9.6 ↑ | 24.7 ↑ | 13.7 ↓ |

Series-watching modes (cont'd)

QB6. Nowadays, it is possible to watch TV series / soap operas in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total | Region | | | |
|--|-------------|--------------|-------------|----------------|-----------------|
| | | Quebec | Ontario | Western Canada | Atlantic Canada |
| d) TV series / soap operas on a mobile device such as an iPad or other tablet, smartphone, etc. | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 86% | 89% ↑ | 86% | 84% ↓ | 88% |
| A few times a month | 7% | 5% | 7% | 8% | 6% |
| Once a week or more | 7% | 6% | 7% | 8% | 6% |
| AVERAGE: | 13.1 | 11.2 | 12.2 | 15.7 | 13.2 |
| c) TV series / soap operas on DVD / Blu-Ray / VHS that you own | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 85% | 88% ↑ | 83% ↓ | 85% | 89% ↑ |
| A few times a month | 9% | 7% ↓ | 11% ↑ | 9% | 6% ↓ |
| Once a week or more | 6% | 5% | 7% | 6% | 5% |
| AVERAGE: | 11.3 | 11.1 | 12.4 | 10.4 | 9.2 |
| a) TV series / soap operas rented from a video store | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 94% | 95% | 93% | 94% | 94% |
| A few times a month | 3% | 4% | 4% | 2% | 2% |
| Once a week or more | 3% | 2% ↓ | 4% | 4% | 4% |
| AVERAGE: | 6.1 | 3.0 ↓ | 7.0 | 6.8 | 8.3 |

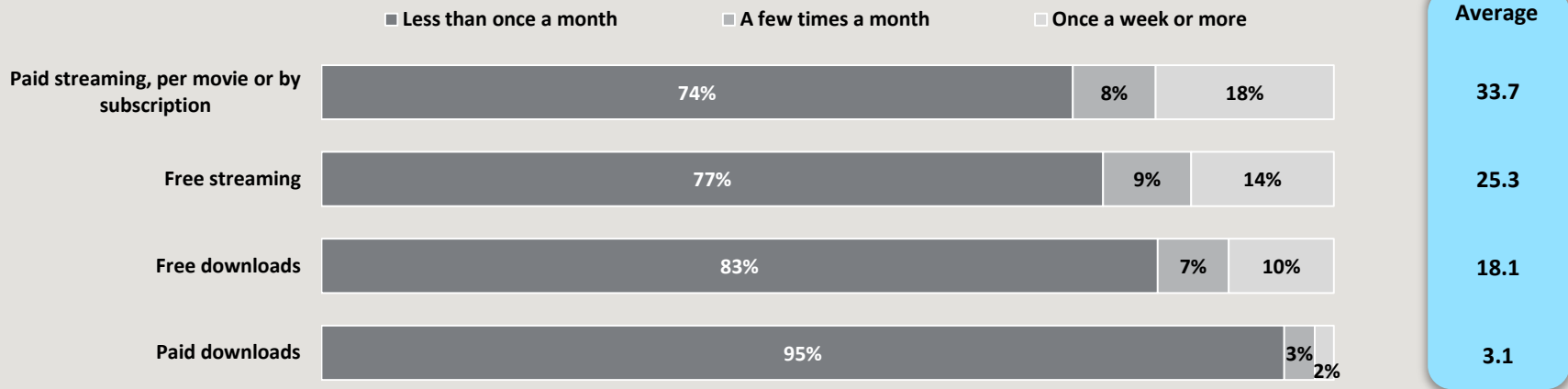
Series-watching modes (cont'd)

QB6. Nowadays, it is possible to watch TV series / soap operas in different places and on various technological platforms. How often would you say you have watched the following in the past year?

| | Total | Age | | | | Region / Language spoken | |
|--|-------------|--------------------|--------------------|--------------------|-----------------------|--------------------------|---|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French-speaking Canada |
| d) TV series / soap operas on a mobile device such as an iPad or other tablet, smartphone, etc. | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 86% | 62% ↓ | 77% ↓ | 87% | 96% ↑ | 89% ↑ | 85% ↓ |
| A few times a month | 7% | 20% ↑ | 12% ↑ | 6% ↓ | 3% ↓ | 5% | 7% |
| Once a week or more | 7% | 18% ↑ | 11% ↑ | 7% | 2% ↓ | 5% | 7% |
| AVERAGE: | 13.1 | 43.4 ↑ | 20.4 ↑ | 12.8 | 2.9 ↑ | 8.4 ↓ | 14.3 ↑ |
| c) TV series / soap operas on DVD / Blu-Ray / VHS that you own | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 85% | 78% ↓ | 78% ↓ | 86% | 91% ↑ | 89% ↑ | 84% ↓ |
| A few times a month | 9% | 17% ↑ | 13% ↑ | 9% | 5% ↓ | 6% ↓ | 10% ↑ |
| Once a week or more | 6% | 5% | 9% ↑ | 5% | 3% ↓ | 5% | 6% |
| AVERAGE: | 11.3 | 11.7 | 18.0 ↑ | 9.8 | 7.1 ↑ | 10.0 | 11.6 |
| a) TV series / soap operas rented from a video store | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 94% | 88% ↓ | 90% ↓ | 93% | 98% ↑ | 95% ↑ | 93% ↓ |
| A few times a month | 3% | 9% ↑ | 5% ↑ | 3% | 1% ↓ | 3% | 3% |
| Once a week or more | 3% | 3% | 5% ↑ | 4% | 2% ↓ | 1% ↓ | 4% ↑ |
| AVERAGE: | 6.1 | 9.5 | 8.0 | 7.7 | 2.2 ↓ | 2.3 ↓ | 7.1 ↑ |

Online content acquisition methods

QB7. How often would you say you have used the following means of watching TV series / soap operas in the past year?



Online content acquisition methods (cont'd)

QB7. How often would you say you have used the following means of watching TV series / soap operas in the past year?

| | Total | Region | | | |
|--|-------------|---------------|-------------|----------------|-----------------|
| | | Quebec | Ontario | Western Canada | Atlantic Canada |
| c) Paid streaming, per movie or by subscription | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 74% | 84% ↑ | 74% | 68% ↓ | 68% ↓ |
| A few times a month | 8% | 6% ↓ | 9% | 9% | 9% |
| Once a week or more | 18% | 10% ↓ | 17% | 23% ↑ | 23% ↑ |
| AVERAGE: | 33.7 | 19.9 ↓ | 32.0 | 43.9 ↑ | 45.3 ↑ |
| d) Free streaming (live streaming through Tou.tv, etc.) | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 77% | 76% | 76% | 79% | 81% ↑ |
| A few times a month | 9% | 9% | 9% | 9% | 9% |
| Once a week or more | 14% | 15% | 16% | 12% | 10% ↓ |
| AVERAGE: | 25.3 | 25.3 | 28.8 | 22.4 | 18.6 ↓ |
| b) Free downloads (e.g.: Torrent file sites) | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 83% | 86% ↑ | 81% ↓ | 83% | 80% |
| A few times a month | 7% | 6% | 8% | 6% | 8% |
| Once a week or more | 10% | 8% ↓ | 12% | 10% | 13% |
| AVERAGE: | 18.1 | 15.7 | 18.7 | 18.1 | 22.6 |
| a) Paid downloads (e.g.: iTunes and Amazon) | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Less than once a month | 95% | 97% ↑ | 95% | 93% ↓ | 96% |
| A few times a month | 3% | 2% | 3% | 4% | 2% |
| Once a week or more | 2% | 0% ↓ | 2% | 3% ↑ | 1% |
| AVERAGE: | 3.1 | 1.0 ↓ | 2.5 | 5.6 ↑ | 3.0 |

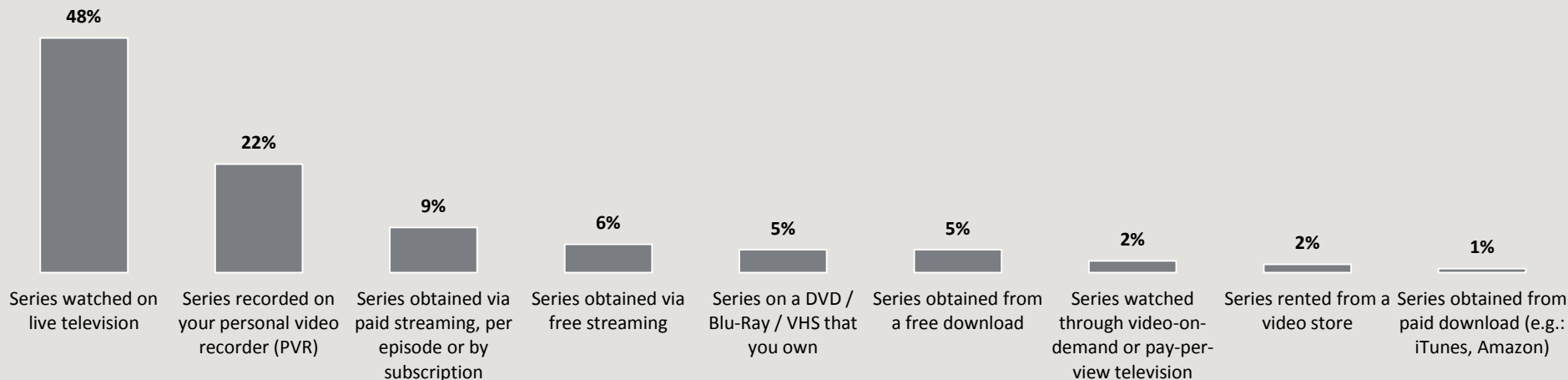
Online content acquisition methods (cont'd)

QB7. How often would you say you have used the following means of watching TV series / soap operas in the past year?

| | Total | Age | | | | Region / Language spoken | |
|--|-------------|--------------------|--------------------|--------------------|-----------------------|--------------------------|---|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French-speaking Canada |
| c) Paid streaming, per movie or by subscription | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 74% | 61% ↓ | 58% ↓ | 76% | 88% ↑ | 86% ↑ | 71% ↓ |
| A few times a month | 8% | 13% | 13% ↑ | 8% | 3% ↓ | 6% ↓ | 9% ↑ |
| Once a week or more | 18% | 27% ↑ | 29% ↑ | 16% ↓ | 9% ↓ | 8% ↓ | 20% ↑ |
| AVERAGE: | 33.7 | 48.7 | 58.0 ↑ | 27.7 ↓ | 17.6 ↓ | 15.9 ↓ | 38.3 ↑ |
| d) Free streaming (live streaming through Tou.tv, etc.) | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 77% | 46% ↓ | 61% ↓ | 80% ↑ | 92% ↑ | 76% | 78% |
| A few times a month | 9% | 21% ↑ | 15% ↑ | 7% ↓ | 4% ↓ | 9% | 9% |
| Once a week or more | 14% | 34% ↑ | 24% ↑ | 13% | 5% ↓ | 15% | 14% |
| AVERAGE: | 25.3 | 60.7 ↑ | 42.2 ↑ | 23.0 | 8.5 ↑ | 26.0 | 25.1 |
| b) Free downloads (e.g.: Torrent file sites) | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 83% | 74% ↓ | 72% ↓ | 83% | 92% ↑ | 86% ↑ | 82% ↓ |
| A few times a month | 7% | 12% ↑ | 12% ↑ | 6% | 3% ↓ | 6% | 7% |
| Once a week or more | 10% | 14% | 17% ↑ | 11% | 5% ↓ | 8% ↓ | 11% ↑ |
| AVERAGE: | 18.1 | 24.7 | 28.5 ↑ | 17.6 | 8.7 ↑ | 14.5 | 19.0 |
| a) Paid downloads (e.g.: iTunes and Amazon) | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Less than once a month | 95% | 89% ↓ | 92% ↓ | 95% | 99% ↑ | 98% ↑ | 95% ↓ |
| A few times a month | 3% | 9% ↑ | 5% ↑ | 3% | 1% ↓ | 2% | 3% |
| Once a week or more | 2% | 2% | 3% ↑ | 2% | 1% ↓ | 0% ↓ | 2% ↑ |
| AVERAGE: | 3.1 | 4.9 | 5.0 ↑ | 3.2 | 1.2 ↓ | 0.7 ↓ | 3.8 ↑ |

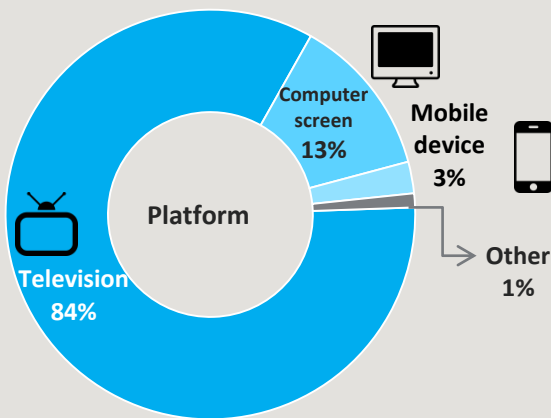
Last episode watched

QB8. How did you go about acquiring the last TV series / soap opera episode you watched specifically at home?



As is the case for movies, live viewing on TV is the most popular way for respondents to watch series. **However, Canadians surveyed significantly prefer this viewing mode when it comes to series**, with nearly half of them reporting the last episode they watched was viewed this way (48% compared to 26% for the last movie watched).

QB9. And on which of the following platforms did you watch this most recent TV series/soap opera episode?



Last episode watched (cont'd)

| | Total | Region | | | |
|--|----------|---------|---------|----------------|-----------------|
| | | Quebec | Ontario | Western Canada | Atlantic Canada |
| QB8 Method used to watch last movie | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| Watched on live television | 48% | 56% ↑ | 48% | 43% ↓ | 49% |
| Recorded on personal video recorder | 22% | 22% | 19% ↓ | 28% ↑ | 22% |
| Via paid streaming, per episode or by subscription | 9% | 4% ↓ | 10% | 11% ↑ | 14% ↑ |
| Via free streaming | 6% | 5% | 7% ↑ | 5% | 4% |
| On a DVD / Blu-Ray / VHS that you own | 5% | 4% | 6% ↑ | 4% | 3% |
| From a free download | 5% | 3% ↓ | 5% | 5% | 6% |
| Watched through video-on-demand or pay-per-view television | 2% | 4% ↑ | 2% | 2% | 1% ↓ |
| Rented from a video store | 2% | 2% | 2% | 2% | 1% |
| From a paid download | 1% | 1% | 1% | 1% | 1% |
| QB9 Platform used to watch last movie | n = 2865 | n = 725 | n = 745 | n = 730 | n = 665 |
| On television | 84% | 88% ↑ | 81% ↓ | 84% | 85% |
| On a computer screen or a TV screen linked to a computer | 13% | 10% ↓ | 15% ↑ | 12% | 12% |
| On a mobile device such as an iPad or any other tablet, smartphone, etc. | 3% | 1% ↓ | 3% | 3% | 3% |
| Other | 1% | 1% | 1% | 1% | 1% |

Last episode watched (cont'd)

| | Total | Age | | | | Region / Language spoken | |
|--|----------|--------------------|--------------------|--------------------|-----------------------|--------------------------|---|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French-speaking Canada |
| QB8 Method used to watch last TV series episode | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| Watched on live television | 48% | 45% | 33% ↓ | 49% | 61% ↑ | 58% ↑ | 46% ↓ |
| Recorded on personal video recorder | 22% | 10% ↓ | 21% | 24% | 23% | 21% | 23% |
| Via paid streaming, per episode or by subscription | 9% | 14% | 15% ↑ | 8% | 5% ↓ | 3% ↓ | 11% ↑ |
| Via free streaming | 6% | 15% ↑ | 11% ↑ | 4% ↓ | 1% ↓ | 5% | 6% |
| On a DVD / Blu-Ray / VHS that you own | 5% | 1% | 5% | 4% | 5% | 4% | 5% |
| From a free download | 5% | 7% | 9% ↑ | 4% | 1% ↓ | 3% | 5% ↑ |
| Watched through video-on-demand or pay-per-view television | 2% | 5% | 2% | 3% ↑ | 2% ↓ | 4% ↑ | 2% ↓ |
| Rented from a video store | 2% | 2% | 2% | 2% | 1% | 2% | 2% |
| From a paid download | 1% | 1% | 2% ↑ | 1% | 0% ↓ | 0% ↓ | 1% ↑ |
| QB9 Platform used to watch last TV series episode | n = 2865 | n = 109 | n = 731 | n = 1049 | n = 976 | n = 622 | n = 2243 |
| On television | 84% | 63% ↓ | 71% ↓ | 87% ↑ | 94% ↑ | 89% ↑ | 82% ↓ |
| On a computer screen or a TV screen linked to a computer | 13% | 27% ↑ | 25% ↑ | 9% ↓ | 4% ↓ | 9% ↓ | 14% ↑ |
| On a mobile device such as an iPad or any other tablet, smartphone, etc. | 3% | 5% | 3% | 4% ↑ | 1% ↓ | 1% ↓ | 3% ↑ |
| Other | 1% | 6% ↑ | 1% | 0% ↓ | 1% | 1% | 1% |

Sources of information and preferences



GENRE IS STILL KEY FACTOR IN CHOOSING MOVIES

- Although this factor is slightly less important than it was last year (importance score of 7.8 compared to 8.1 in 2013), **genre** is still the **key factor** when it comes to choosing a movie to watch. Nearly seven out of 10 (68%) respondents consider this element essential.
 - It should be noted that this choice criterion is especially important to French-speaking Quebecers who gave it an average importance score of 8.1 (compared to 7.8 for English-speaking Canadians).

7.8

Average importance
score of type of movie
(compared to 8.1 in 2013)

7.3

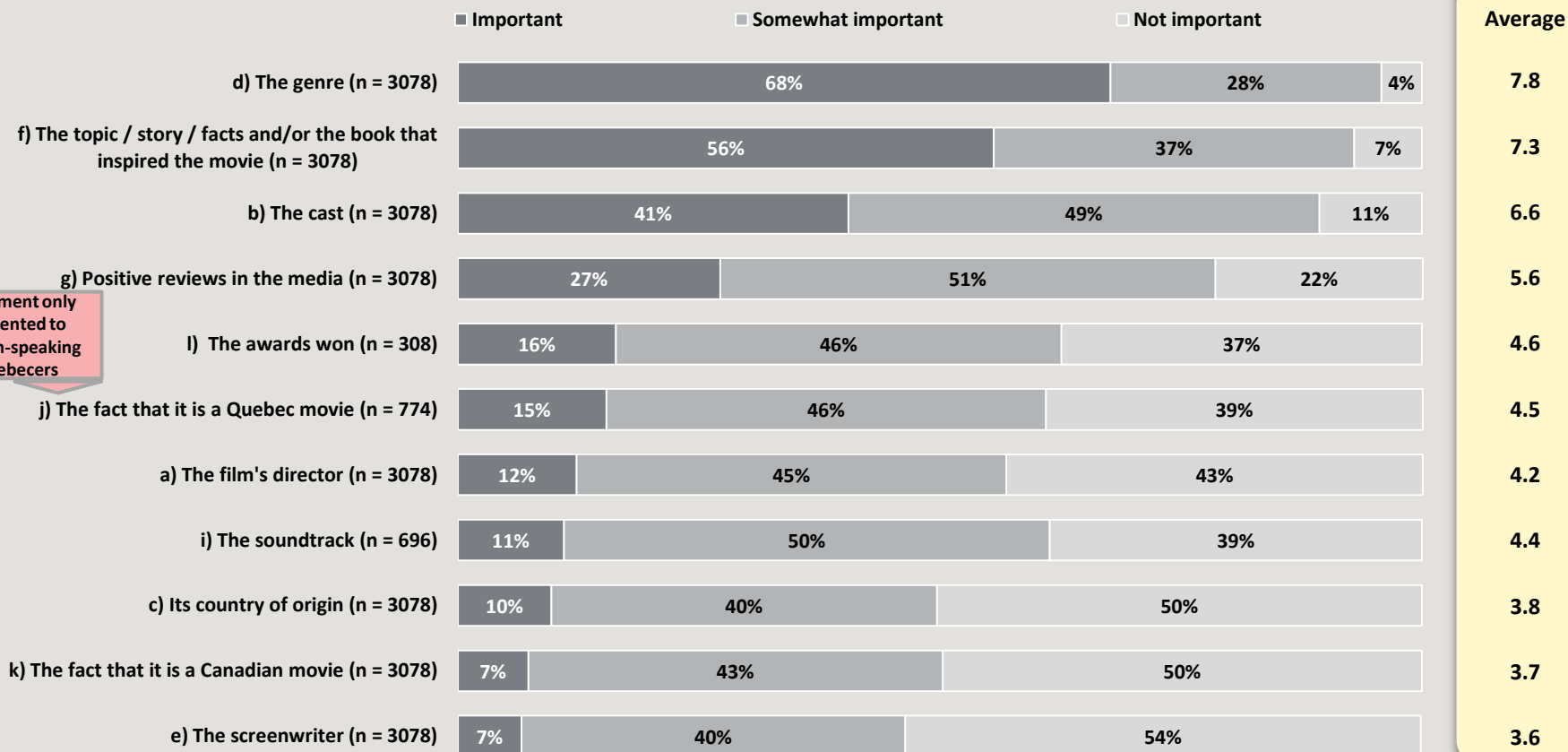
Average importance score of
the topic, story, facts and/or
book that inspired a movie
(same as in 2013)

- The topic, story, facts and/or book that inspired a movie **once again rank second in importance** when it comes to choosing a film with the same average importance score as last year. Respondents gave this factor a score of 7.3 and more than half (56%) of them rate it very important.
 - This choice criterion is also considerably more important to French-speaking Quebecers (average importance score of 7.5 compared to 7.2 for English-speaking Canadians).

- Again this year, the survey reveals that the **country of origin of a film** doesn't hold much importance for the viewers surveyed.
 - First and foremost, the country of origin of a film is one of the least important factors considered when choosing a movie, with an average score of 3.8 and half (50%) of respondents saying it is "not important."
 - We also see that **films being made in Canada or Quebec** is not a determining factor in choosing a movie (average importance scores of 3.7 and 4.5, respectively).
- It is interesting to note that French-speaking Quebecers care more about the country of origin of a movie (average score of 4.5 compared to 3.6) and award a higher importance score to Canadian films (4.3 compared to 3.6) than English-speaking Canadians.

Factors for choosing a movie

QC1. How important are the following when it comes to choosing a movie?



Statement only presented to French-speaking Quebecers

Factors for choosing a movie (cont'd)

QC1. How important are the following when it comes to choosing a movie?

| | Total | | Region | | | |
|---|--------------|--------------|--------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| d) The type of movie | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 72% ↑ | 68% ↓ | 72% ↑ | 66% | 67% | 68% |
| Somewhat important (4 to 7) | 26% | 28% | 24% ↓ | 30% | 29% | 28% |
| Not important (1 to 3) | 3% ↓ | 4% ↑ | 4% | 5% | 4% | 4% |
| AVERAGE: | 8.1 ↑ | 7.8 ↓ | 8.1 ↑ | 7.7 ↓ | 7.8 | 7.8 |
| f) The topic / story / facts and / or the book that inspired the movie | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 57% | 56% | 60% ↑ | 55% | 54% | 55% |
| Somewhat important (4 to 7) | 35% | 37% | 32% ↓ | 40% ↑ | 38% | 39% |
| Not important (1 to 3) | 8% | 7% | 8% | 6% ↓ | 8% | 6% |
| AVERAGE: | 7.3 | 7.3 | 7.5 ↑ | 7.3 | 7.2 ↓ | 7.3 |
| b) The cast | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 45% ↑ | 41% ↓ | 44% ↑ | 41% | 38% ↓ | 39% |
| Somewhat important (4 to 7) | 45% ↓ | 49% ↑ | 46% | 50% | 50% | 48% |
| Not important (1 to 3) | 10% | 11% | 10% | 9% | 12% | 13% ↑ |
| AVERAGE: | 6.8 ↑ | 6.6 ↓ | 6.8 ↑ | 6.6 | 6.4 ↓ | 6.4 |
| g) Positive reviews in the media | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 33% ↑ | 27% ↓ | 24% | 28% | 28% | 29% |
| Somewhat important (4 to 7) | 50% | 51% | 49% | 53% | 52% | 48% |
| Not important (1 to 3) | 17% ↓ | 22% ↑ | 26% ↑ | 19% ↓ | 20% | 23% |
| AVERAGE: | 6.1 ↑ | 5.6 ↓ | 5.3 ↓ | 5.9 ↑ | 5.7 | 5.6 |
| l) The awards won | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 20% ↑ | 16% ↓ | 17% | 17% | 17% | 12% ↓ |
| Somewhat important (4 to 7) | 47% | 46% | 46% | 48% | 45% | 45% |
| Not important (1 to 3) | 33% ↓ | 37% ↑ | 38% | 35% | 38% | 43% ↑ |
| AVERAGE: | 4.9 ↑ | 4.6 ↓ | 4.6 | 4.7 | 4.5 | 4.2 ↓ |
| j) The fact that it is a Quebec movie | n = 442 | n = 774 | n = 774 | n = 0 | n = 0 | n = 0 |
| Important (8 to 10) | 16% | 15% | 15% | | | |
| Somewhat important (4 to 7) | 41% | 46% | 46% | | | |
| Not important (1 to 3) | 44% | 39% | 39% | | | |
| AVERAGE: | 4.3 | 4.5 | 4.5 | | | |

Statement only presented to French-speaking Quebecers

Factors for choosing a movie (cont'd)

QC1. How important are the following when it comes to choosing a movie?

| | Total 2014 | Age | | | | Region / Language spoken | |
|---|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| d) The type of movie | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 68% | 73% | 64% ↓ | 68% | 69% | 73% ↑ | 66% ↓ |
| Somewhat important (4 to 7) | 28% | 19% ↓ | 32% ↑ | 28% | 26% ↓ | 23% ↓ | 29% ↑ |
| Not important (1 to 3) | 4% | 8% | 4% | 3% | 5% | 4% | 4% |
| AVERAGE: | 7.8 | 7.9 | 7.8 | 7.9 | 7.9 | 8.1 ↑ | 7.8 ↓ |
| f) The topic / story / facts and / or the book that inspired the movie | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 56% | 57% | 54% | 55% | 58% | 61% ↑ | 54% ↓ |
| Somewhat important (4 to 7) | 37% | 32% | 39% | 39% | 35% | 32% ↓ | 39% ↑ |
| Not important (1 to 3) | 7% | 11% | 7% | 7% | 7% | 7% | 7% |
| AVERAGE: | 7.3 | 7.2 | 7.3 | 7.3 | 7.3 | 7.5 ↑ | 7.2 ↓ |
| b) The cast | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 41% | 44% | 38% | 41% | 41% | 45% ↑ | 39% ↓ |
| Somewhat important (4 to 7) | 49% | 38% ↓ | 53% ↑ | 50% | 46% ↓ | 46% | 50% |
| Not important (1 to 3) | 11% | 18% ↑ | 9% ↓ | 8% ↓ | 14% ↑ | 10% | 11% |
| AVERAGE: | 6.6 | 6.4 | 6.6 | 6.7 ↑ | 6.4 ↓ | 6.8 ↑ | 6.5 ↓ |
| g) Positive reviews in the media | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 27% | 33% | 31% ↑ | 25% ↓ | 26% | 23% ↓ | 28% ↑ |
| Somewhat important (4 to 7) | 51% | 47% | 52% | 55% ↑ | 48% ↓ | 50% | 52% |
| Not important (1 to 3) | 22% | 20% | 17% ↓ | 20% | 26% ↑ | 26% ↑ | 20% ↓ |
| AVERAGE: | 5.6 | 6.0 | 5.9 ↑ | 5.7 | 5.4 ↓ | 5.3 ↓ | 5.8 ↓ |
| l) The awards won | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 16% | 15% | 15% | 16% | 18% ↑ | 16% | 17% |
| Somewhat important (4 to 7) | 46% | 46% | 47% | 47% | 45% | 47% | 46% |
| Not important (1 to 3) | 37% | 39% | 38% | 37% | 37% | 37% | 37% |
| AVERAGE: | 4.6 | 4.4 | 4.5 | 4.6 | 4.7 | 4.6 | 4.6 |
| j) The fact that it is a Quebec movie | n = 774 | n = 29 | n = 208 | n = 266 | n = 271 | n = 662 | n = 112 |
| Important (8 to 10) | 15% | 4% | 13% | 15% | 19% ↑ | 17% ↑ | 3% ↓ |
| Somewhat important (4 to 7) | 46% | 51% | 44% | 45% | 47% | 49% ↑ | 25% ↓ |
| Not important (1 to 3) | 39% | 44% | 43% | 40% | 34% ↓ | 34% ↓ | 72% ↑ |
| AVERAGE: | 4.5 | 3.8 | 4.2 | 4.5 | 4.8 ↑ | 4.8 ↑ | 2.6 ↓ |

Statement only presented to French-speaking Quebecers

Factors for choosing a movie (cont'd)

QC1. How important are the following when it comes to choosing a movie?

| | Total | | Region | | | |
|---|--------------|--------------|--------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| a) The film's director | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 15% ↑ | 12% ↓ | 14% | 13% | 11% | 9% ↓ |
| Somewhat important (4 to 7) | 45% | 45% | 47% | 46% | 41% ↓ | 42% |
| Not important (1 to 3) | 40% ↓ | 43% ↑ | 39% ↓ | 41% | 48% ↑ | 49% ↑ |
| AVERAGE: | 4.4 ↑ | 4.2 ↓ | 4.4 ↑ | 4.3 | 4.0 ↓ | 3.8 ↓ |
| j) The film's soundtrack | n = 303 | n = 696 | n = 662 | n = 11 | n = 10 | n = 13 |
| Important (8 to 10) | 18% ↑ | 11% ↓ | 11% | 24% | 10% | 7% |
| Somewhat important (4 to 7) | 52% | 50% | 50% | 37% | 81% | 35% |
| Not important (1 to 3) | 30% ↓ | 39% ↑ | 39% | 40% | 10% | 58% |
| AVERAGE: | 4.9 ↑ | 4.4 ↓ | 4.3 | 4.7 | 5.8 | 3.4 |
| c) The film's country of origin | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 11% | 10% | 15% ↑ | 8% ↓ | 9% | 9% |
| Somewhat important (4 to 7) | 38% | 40% | 45% ↑ | 39% | 38% | 37% |
| Not important (1 to 3) | 51% | 50% | 40% ↓ | 53% ↑ | 54% ↑ | 54% |
| AVERAGE: | 3.8 | 3.8 | 4.4 ↑ | 3.6 ↓ | 3.6 ↓ | 3.6 ↓ |
| k) The fact that it is a Canadian film | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 10% ↑ | 7% ↓ | 9% ↑ | 7% | 6% | 9% |
| Somewhat important (4 to 7) | 43% | 43% | 49% ↑ | 43% | 38% ↓ | 43% |
| Not important (1 to 3) | 47% | 50% | 42% ↓ | 50% | 56% ↑ | 49% |
| AVERAGE: | 3.9 ↑ | 3.7 ↓ | 4.2 ↑ | 3.7 | 3.4 ↓ | 3.8 |
| e) The film's screenwriter | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Important (8 to 10) | 9% ↑ | 7% ↓ | 9% ↑ | 6% | 6% | 5% |
| Somewhat important (4 to 7) | 41% | 40% | 47% ↑ | 40% | 36% ↓ | 34% ↓ |
| Not important (1 to 3) | 50% ↓ | 54% ↑ | 45% ↓ | 54% | 58% ↑ | 61% ↑ |
| AVERAGE: | 3.7 ↑ | 3.6 ↓ | 4.0 ↑ | 3.6 | 3.4 ↓ | 3.2 ↓ |

Factors for choosing a movie (cont'd)

QC1. How important are the following when it comes to choosing a movie?

| | Total 2014 | Age | | | | Region / Language spoken | |
|---|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| a) The film's director | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 12% | 16% | 14% | 11% | 11% | 13% | 12% |
| Somewhat important (4 to 7) | 45% | 38% | 45% | 47% ↑ | 42% ↓ | 47% | 44% |
| Not important (1 to 3) | 43% | 46% | 41% | 41% | 47% ↑ | 40% ↓ | 44% ↑ |
| AVERAGE: | 4.2 | 4.3 | 4.4 | 4.3 | 4.0 ↓ | 4.4 ↑ | 4.2 ↓ |
| i) The film's soundtrack | n = 696 | n = 26* | n = 181 | n = 231 | n = 258 | n = 662 | n = 34 |
| Important (8 to 10) | 11% | 16% | 8% | 10% | 13% | 11% | 16% |
| Somewhat important (4 to 7) | 50% | 34% | 47% | 51% | 54% | 50% | 53% |
| Not important (1 to 3) | 39% | 50% | 45% ↑ | 39% | 33% ↓ | 39% | 31% |
| AVERAGE: | 4.4 | 4.0 | 4.0 ↓ | 4.4 | 4.7 ↑ | 4.3 | 5.0 |
| c) The film's country of origin | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 10% | 11% | 9% | 9% | 10% | 15% ↑ | 8% ↓ |
| Somewhat important (4 to 7) | 40% | 37% | 39% | 41% | 40% | 48% ↑ | 38% ↓ |
| Not important (1 to 3) | 50% | 52% | 52% | 50% | 49% | 37% ↓ | 54% ↑ |
| AVERAGE: | 3.8 | 3.8 | 3.8 | 3.8 | 3.8 | 4.5 ↑ | 3.6 ↓ |
| k) The fact that it is a Canadian film | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 7% | 9% | 6% ↓ | 6% | 10% ↑ | 10% ↑ | 7% ↓ |
| Somewhat important (4 to 7) | 43% | 42% | 39% ↓ | 44% | 46% ↑ | 50% ↑ | 41% ↓ |
| Not important (1 to 3) | 50% | 50% | 56% ↑ | 50% | 44% ↓ | 40% ↓ | 52% ↑ |
| AVERAGE: | 3.7 | 3.6 | 3.4 ↓ | 3.7 | 4.0 ↑ | 4.3 ↑ | 3.6 ↓ |
| e) The film's screenwriter | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Important (8 to 10) | 7% | 8% | 8% | 7% | 6% | 8% | 6% |
| Somewhat important (4 to 7) | 40% | 39% | 40% | 40% | 40% | 48% ↑ | 38% ↓ |
| Not important (1 to 3) | 54% | 54% | 52% | 53% | 55% | 45% ↓ | 56% ↑ |
| AVERAGE: | 3.6 | 3.7 | 3.7 | 3.6 | 3.4 ↓ | 4.0 ↑ | 3.5 ↓ |

Base: All respondents

**Note: These results should be interpreted with caution due to the small sample size (n < 30).

THE SAME FOUR BROAD TYPES OF MOVIES SCORE HIGHEST WITH CANADIAN VIEWERS

- As was the case in 2013, Canadians surveyed identified their four favourite genres of movies as **comedies** (average interest score of 7.7), **action/adventure films** (7.5), **dramas** (7.3) and **mysteries/thrillers** (7.3). In fact, more than half of respondents report having great interest in these categories (62%, 59%, 56% and 55%, respectively).
 - It goes without saying that significant differences exist between age groups. Viewers in the 15-to-17 age range report having the greatest interest in comedies (average score of 8.2), while those 55 and older definitely prefer dramas (7.5) and mysteries/thrillers (7.4).
- Horror/suspense movies (average interest score of 4.8), musicals (4.8) and westerns (4.4) scored the lowest out of all the categories, only appealing to a small number of respondents (24%, 18% and 16%, respectively).
- While Canadians of all regions – as well as French-speaking Quebecers and English-speaking Canadians alike – have similar preferences when it comes to types of movies, **several interesting age-related differences can be found in the data**. For example, the four favourite types of movies for those 55 and older are dramas (7.5), mysteries/thrillers (7.4), comedies (7.2) and action/adventure films (7.1) while 15- to 17-year-olds prefer comedies (8.2), action/adventure flicks (7.5), sci-fi films (6.6) and animated movies (6.6).



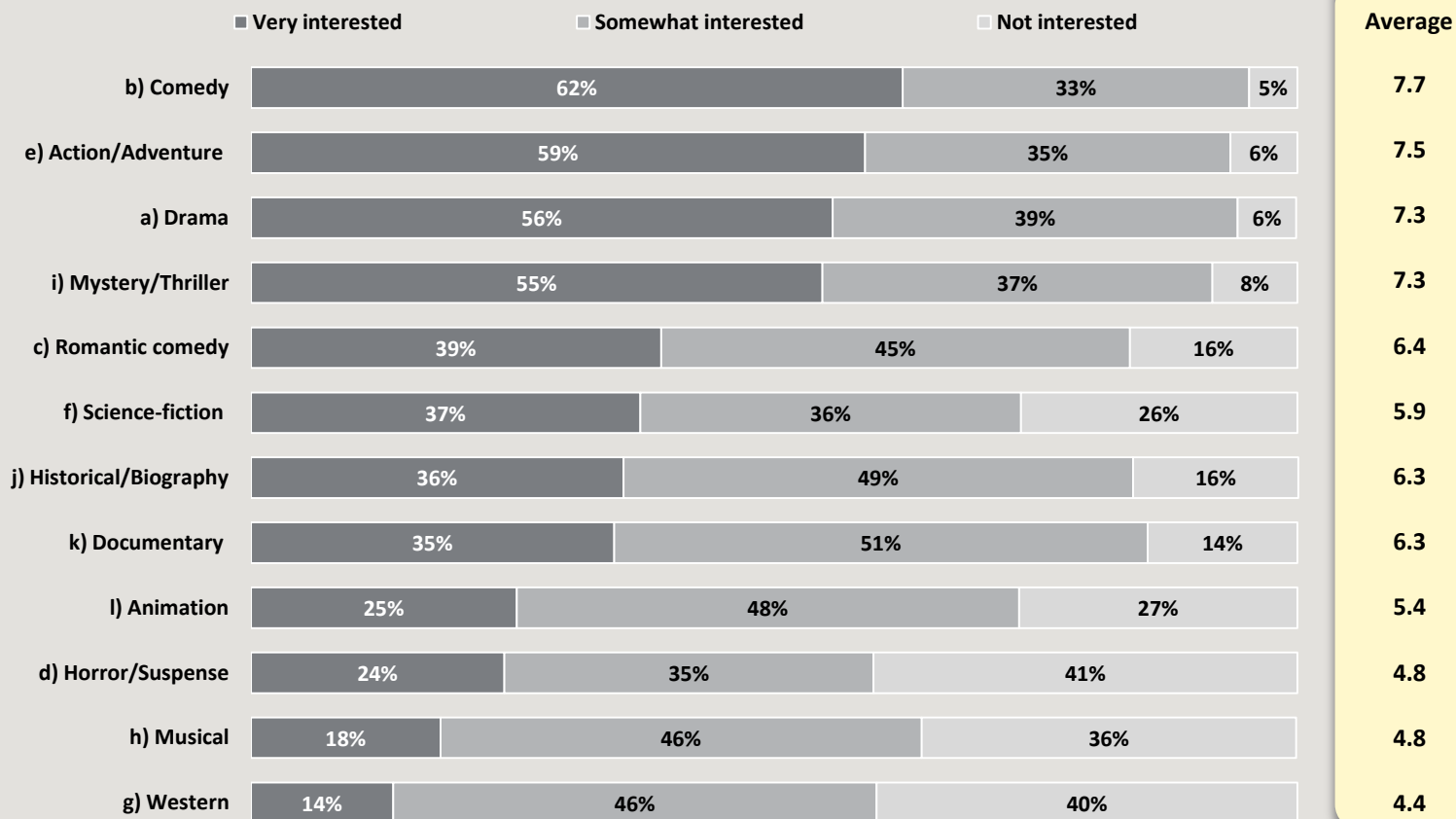
HOLLYWOOD BIG BUDGET MOVIES ARE THE MOST APPEALING

- More than nine in 10 (93%) respondents** report they're **very interested in Hollywood** big budget movies, and this phenomenon is the same across all regions surveyed.
 - It should be noted that those 55 and older show significantly less interest in blockbusters (average score of 6.7) than 18- to 34-year-olds and 35- to 54-year-olds (average score of 7.3 for both groups).
- Interestingly, **Quebec films** seem to be **more appealing to French-speaking Quebecers than they were last year**. Nearly one third (31%) of these respondents reported being very interested in local films compared to only one quarter (24%) of them in 2013.



Types of movies

QC2. How interested are you in the following types of movies?



Types of movies (cont'd)

QC2. How interested are you in the following types of movies?

| | Total | | Region | | | |
|---|--------------|--------------|--------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| b) Comedy | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 65% ↑ | 62% ↓ | 59% ↓ | 64% | 63% | 64% |
| Somewhat interested (4 to 7) | 30% ↓ | 33% ↑ | 36% ↑ | 31% | 33% | 31% |
| Not interested (1 to 3) | 5% | 5% | 5% | 5% | 4% | 5% |
| AVERAGE: | 7.9 ↑ | 7.7 ↓ | 7.6 ↓ | 7.8 | 7.7 | 7.8 |
| e) Action / Adventure | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 62% ↑ | 59% ↓ | 60% | 58% | 58% | 59% |
| Somewhat interested (4 to 7) | 31% ↓ | 35% ↑ | 34% | 36% | 35% | 33% |
| Not interested (1 to 3) | 7% | 6% | 6% | 6% | 7% | 8% |
| AVERAGE: | 7.6 ↑ | 7.5 ↓ | 7.5 | 7.5 | 7.4 | 7.5 |
| a) Drama | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 55% | 56% | 50% ↓ | 59% ↑ | 56% | 56% |
| Somewhat interested (4 to 7) | 39% | 39% | 43% ↑ | 36% ↓ | 39% | 37% |
| Not interested (1 to 3) | 6% | 6% | 7% ↑ | 5% | 5% | 6% |
| AVERAGE: | 7.4 | 7.3 | 7.1 ↓ | 7.5 ↑ | 7.4 | 7.3 |
| l) Mystery / Thriller | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 57% | 55% | 56% | 56% | 52% ↓ | 54% |
| Somewhat interested (4 to 7) | 35% | 37% | 38% | 36% | 38% | 37% |
| Not interested (1 to 3) | 8% | 8% | 6% ↓ | 8% | 10% ↑ | 9% |
| AVERAGE: | 7.3 | 7.3 | 7.4 ↑ | 7.3 | 7.1 ↓ | 7.2 |
| c) Romantic comedy | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 44% ↑ | 39% ↓ | 37% | 40% | 39% | 41% |
| Somewhat interested (4 to 7) | 41% ↓ | 45% ↑ | 46% | 44% | 45% | 41% ↓ |
| Not interested (1 to 3) | 14% | 16% | 17% | 15% | 16% | 18% |
| AVERAGE: | 6.7 ↑ | 6.4 ↓ | 6.3 | 6.5 | 6.3 | 6.4 |
| f) Science fiction | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 36% | 37% | 37% | 38% | 37% | 36% |
| Somewhat interested (4 to 7) | 38% | 36% | 39% | 35% | 37% | 34% |
| Not interested (1 to 3) | 27% | 26% | 24% | 27% | 27% | 30% ↑ |
| AVERAGE: | 5.8 | 5.9 | 6.0 | 5.9 | 5.8 | 5.7 |

Types of movies (cont'd)

QC2. How interested are you in the following types of movies?

| | Total 2014 | Age | | | | Region / Language spoken | |
|----------------------------------|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| b) Comedy | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 62% | 76% ↑ | 71% ↑ | 63% | 53% ↓ | 57% ↓ | 64% ↑ |
| Somewhat interested (4 to 7) | 33% | 19% ↓ | 27% ↓ | 34% | 39% ↑ | 37% ↑ | 32% ↓ |
| Not interested (1 to 3) | 5% | 6% | 2% ↓ | 3% ↓ | 8% ↑ | 5% | 5% |
| AVERAGE: | 7.7 | 8.2 ↑ | 8.1 ↑ | 7.8 | 7.2 ↓ | 7.5 ↓ | 7.8 |
| e) Action / Adventure | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 59% | 63% | 58% | 64% ↑ | 53% ↓ | 58% | 59% |
| Somewhat interested (4 to 7) | 35% | 30% | 37% | 32% ↓ | 37% ↑ | 36% | 35% |
| Not interested (1 to 3) | 6% | 8% | 5% ↓ | 5% ↓ | 10% ↑ | 6% | 7% |
| AVERAGE: | 7.5 | 7.5 | 7.6 | 7.7 ↑ | 7.1 ↓ | 7.5 | 7.5 |
| a) Drama | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 56% | 34% ↓ | 54% | 56% | 60% ↑ | 48% ↓ | 58% ↑ |
| Somewhat interested (4 to 7) | 39% | 44% | 42% ↑ | 39% | 35% ↓ | 45% ↑ | 37% ↓ |
| Not interested (1 to 3) | 6% | 22% ↑ | 4% | 5% | 5% | 7% ↑ | 5% ↓ |
| AVERAGE: | 7.3 | 6.0 ↓ | 7.3 | 7.4 | 7.5 ↑ | 7.0 ↓ | 7.4 ↑ |
| l) Mystery / Thriller | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 55% | 42% ↓ | 48% ↓ | 57% ↑ | 59% ↑ | 55% | 55% |
| Somewhat interested (4 to 7) | 37% | 37% | 43% ↑ | 36% | 34% ↓ | 40% | 37% |
| Not interested (1 to 3) | 8% | 21% ↑ | 9% | 7% ↓ | 7% | 5% ↓ | 9% ↑ |
| AVERAGE: | 7.3 | 6.2 ↓ | 7.0 ↓ | 7.4 ↑ | 7.4 ↑ | 7.4 ↑ | 7.2 ↓ |
| c) Romantic comedy | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 39% | 34% | 42% | 37% | 40% | 36% ↓ | 40% ↑ |
| Somewhat interested (4 to 7) | 45% | 42% | 44% | 46% | 44% | 48% | 44% |
| Not interested (1 to 3) | 16% | 25% ↑ | 14% | 16% | 16% | 17% | 16% |
| AVERAGE: | 6.4 | 6.0 | 6.5 | 6.3 | 6.4 | 6.2 | 6.4 |
| f) Science fiction | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 37% | 48% ↑ | 37% | 43% ↑ | 31% ↓ | 36% | 38% |
| Somewhat interested (4 to 7) | 36% | 34% | 42% ↑ | 36% | 33% ↓ | 39% | 36% |
| Not interested (1 to 3) | 26% | 18% ↓ | 21% ↓ | 22% ↓ | 37% ↑ | 25% | 27% |
| AVERAGE: | 5.9 | 6.6 ↑ | 6.1 ↑ | 6.2 ↑ | 5.2 ↓ | 5.9 | 5.9 |

Types of movies (cont'd)

QC2. How interested are you in the following types of movies?

| | Total | | Region | | | |
|---|--------------|--------------|--------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| j) Historical / Biography | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 37% | 36% | 36% | 35% | 37% | 36% |
| Somewhat interested (4 to 7) | 49% | 49% | 46% | 50% | 49% | 49% |
| Not interested (1 to 3) | 15% | 16% | 18% ↑ | 15% | 15% | 16% |
| AVERAGE: | 6.4 | 6.3 | 6.2 | 6.3 | 6.3 | 6.3 |
| k) Documentary | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 35% | 35% | 33% | 36% | 35% | 34% |
| Somewhat interested (4 to 7) | 49% | 51% | 50% | 50% | 53% | 51% |
| Not interested (1 to 3) | 16% | 14% | 17% ↑ | 14% | 13% | 15% |
| AVERAGE: | 6.3 | 6.3 | 6.1 ↓ | 6.4 | 6.3 | 6.3 |
| l) Animation | n = 0 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | | 25% | 23% | 27% | 26% | 22% |
| Somewhat interested (4 to 7) | | 48% | 52% ↑ | 46% | 48% | 45% |
| Not interested (1 to 3) | | 27% | 26% | 27% | 26% | 33% ↑ |
| AVERAGE: | | 5.4 | 5.4 | 5.5 | 5.4 | 5.1 ↓ |
| d) Horror / Suspense | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 24% | 24% | 24% | 27% ↑ | 20% ↓ | 24% |
| Somewhat interested (4 to 7) | 35% | 35% | 35% | 34% | 37% | 33% |
| Not interested (1 to 3) | 40% | 41% | 40% | 38% | 43% | 43% |
| AVERAGE: | 4.9 | 4.8 | 4.8 | 5.0 ↑ | 4.5 ↓ | 4.6 |
| h) Musical | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 22% ↑ | 18% ↓ | 14% ↓ | 21% ↑ | 18% | 16% |
| Somewhat interested (4 to 7) | 45% | 46% | 45% | 49% | 45% | 43% |
| Not interested (1 to 3) | 33% | 36% | 41% ↑ | 30% ↓ | 38% | 41% ↑ |
| AVERAGE: | 5.0 ↑ | 4.8 ↓ | 4.4 ↓ | 5.2 ↑ | 4.7 | 4.5 ↓ |
| g) Western | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 16% ↑ | 14% ↓ | 11% ↓ | 14% | 15% | 16% |
| Somewhat interested (4 to 7) | 46% | 46% | 42% ↓ | 48% | 47% | 45% |
| Not interested (1 to 3) | 38% | 40% | 47% ↑ | 38% | 38% | 40% |
| AVERAGE: | 4.6 ↑ | 4.4 ↓ | 4.1 ↓ | 4.5 | 4.6 ↑ | 4.5 |

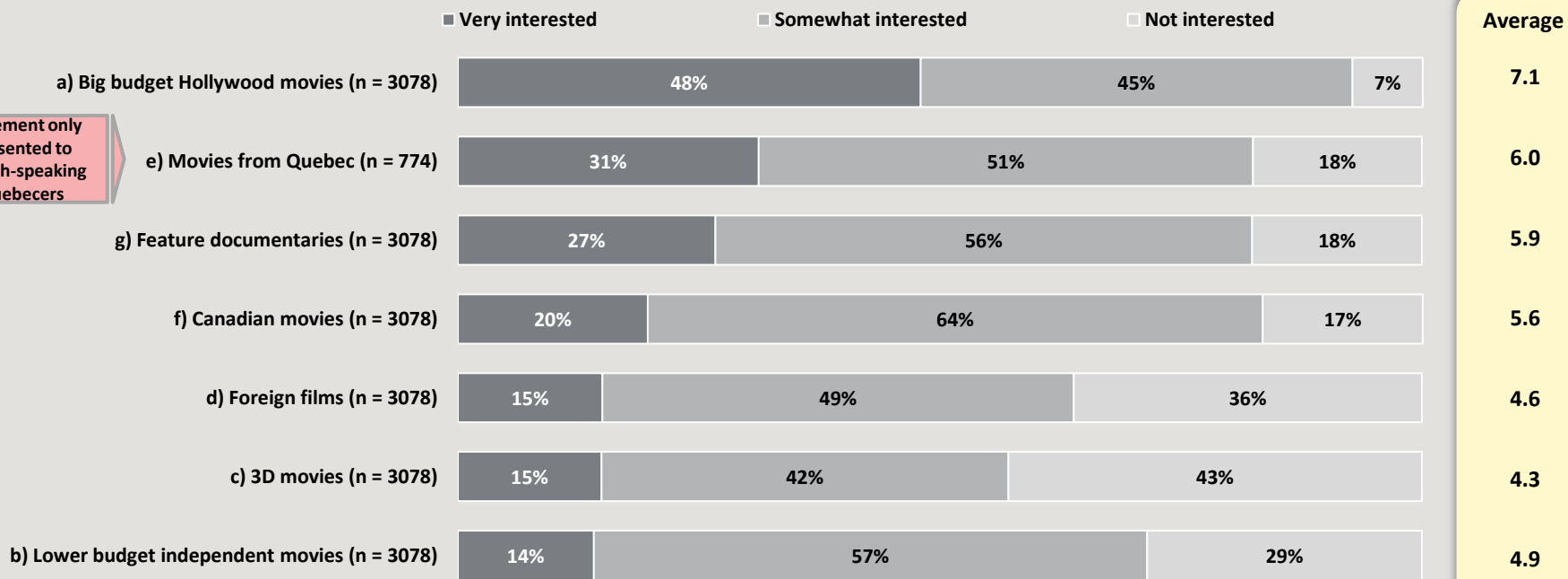
Types of movies (cont'd)

QC2. How interested are you in the following types of movies?

| | Total 2014 | Age | | | | Region / Language spoken | |
|----------------------------------|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|-------------------------------|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French- speaking Quebec | English-speaking / Rest of French- speaking Canada |
| j) Historical / Biography | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 36% | 21% ↓ | 26% ↓ | 36% | 45% ↑ | 36% | 36% |
| Somewhat interested (4 to 7) | 49% | 45% | 54% ↑ | 49% | 45% ↓ | 46% | 49% |
| Not interested (1 to 3) | 16% | 34% ↑ | 19% ↑ | 16% | 11% ↓ | 18% | 15% |
| AVERAGE: | 6.3 | 4.9 ↓ | 5.8 ↓ | 6.3 | 6.8 ↑ | 6.2 | 6.3 |
| k) Documentary | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 35% | 19% ↓ | 30% ↓ | 35% | 41% ↑ | 31% ↓ | 36% ↑ |
| Somewhat interested (4 to 7) | 51% | 52% | 55% ↑ | 52% | 47% ↓ | 52% | 51% |
| Not interested (1 to 3) | 14% | 30% ↑ | 16% | 13% | 12% ↓ | 18% ↑ | 13% ↓ |
| AVERAGE: | 6.3 | 4.9 ↓ | 6.0 ↓ | 6.4 | 6.6 ↑ | 6.0 ↓ | 6.4 ↑ |
| l) Animation | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 25% | 38% ↑ | 32% ↑ | 29% ↑ | 14% ↓ | 22% ↓ | 26% ↑ |
| Somewhat interested (4 to 7) | 48% | 42% | 51% | 48% | 46% | 52% ↑ | 47% ↓ |
| Not interested (1 to 3) | 27% | 20% | 17% ↓ | 23% ↓ | 39% ↑ | 26% | 27% |
| AVERAGE: | 5.4 | 6.3 ↑ | 6.1 ↑ | 5.7 ↑ | 4.5 ↓ | 5.4 | 5.4 |
| d) Horror / Suspense | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 24% | 31% | 30% ↑ | 27% ↑ | 16% ↓ | 23% | 24% |
| Somewhat interested (4 to 7) | 35% | 31% | 36% | 38% ↑ | 33% ↓ | 36% | 35% |
| Not interested (1 to 3) | 41% | 37% | 34% ↓ | 36% ↓ | 51% ↑ | 41% | 40% |
| AVERAGE: | 4.8 | 5.4 ↑ | 5.3 ↑ | 5.1 ↑ | 4.0 ↓ | 4.8 | 4.8 |
| h) Musical | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 18% | 15% | 16% ↓ | 16% ↓ | 23% ↑ | 14% ↓ | 19% ↑ |
| Somewhat interested (4 to 7) | 46% | 44% | 45% | 45% | 49% | 45% | 46% |
| Not interested (1 to 3) | 36% | 41% | 40% ↑ | 39% ↑ | 29% ↓ | 41% ↑ | 35% ↓ |
| AVERAGE: | 4.8 | 4.2 ↓ | 4.6 ↓ | 4.6 ↓ | 5.2 ↑ | 4.4 ↓ | 4.9 ↑ |
| g) Western | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 14% | 10% | 9% ↓ | 13% | 19% ↑ | 10% ↓ | 15% ↑ |
| Somewhat interested (4 to 7) | 46% | 37% ↓ | 41% ↓ | 48% | 49% ↑ | 43% | 47% |
| Not interested (1 to 3) | 40% | 53% ↑ | 50% ↑ | 39% | 32% ↓ | 47% ↑ | 39% ↓ |
| AVERAGE: | 4.4 | 3.6 ↓ | 3.9 ↓ | 4.4 | 4.9 ↑ | 4.1 ↓ | 4.5 ↑ |

Types of movies (cont'd)

QC3. How interested are you in the following types of movies?



Types of movies (cont'd)

QC3. How interested are you in the following types of movies?

Statement only presented to French-speaking Quebecers

| | Total | | Region | | | |
|--|--------------|--------------|--------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| a) Big budget Hollywood movies | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 54% ↑ | 48% ↓ | 48% | 49% | 46% | 49% |
| Somewhat interested (4 to 7) | 39% ↓ | 45% ↑ | 44% | 44% | 48% ↑ | 42% |
| Not interested (1 to 3) | 7% | 7% | 9% | 7% | 6% | 9% |
| AVERAGE: | 7.2 ↑ | 7.1 ↓ | 7.0 | 7.1 | 7.0 | 7.0 |
| e) Quebec movies | n = 442 | n = 774 | n = 774 | n = 0 | n = 0 | n = 0 |
| Very interested (score 8 to 10) | 24% ↓ | 31% ↑ | 31% | | | |
| Somewhat interested (4 to 7) | 49% | 51% | 51% | | | |
| Not interested (1 to 3) | 27% ↑ | 18% ↓ | 18% | | | |
| AVERAGE: | 5.5 ↓ | 6.0 ↑ | 6.0 | | | |
| g) Feature documentaries | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 25% | 27% | 24% ↓ | 29% ↑ | 26% | 27% |
| Somewhat interested (4 to 7) | 55% | 56% | 56% | 54% | 58% | 55% |
| Not interested (1 to 3) | 20% ↑ | 18% ↓ | 21% ↑ | 17% | 16% | 19% |
| AVERAGE: | 5.8 | 5.9 | 5.6 ↓ | 6.0 ↑ | 5.9 | 5.8 |
| f) Canadian movies | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 22% | 20% | 22% ↑ | 20% | 17% ↓ | 22% |
| Somewhat interested (4 to 7) | 61% ↓ | 64% ↑ | 63% | 63% | 66% | 62% |
| Not interested (1 to 3) | 18% | 17% | 15% | 17% | 17% | 17% |
| AVERAGE: | 5.6 | 5.6 | 5.8 ↑ | 5.6 | 5.4 ↓ | 5.7 |
| d) Foreign films | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 13% | 15% | 17% | 16% | 14% | 11% ↓ |
| Somewhat interested (4 to 7) | 48% | 49% | 57% ↑ | 45% ↓ | 49% | 40% ↓ |
| Not interested (1 to 3) | 39% | 36% | 26% ↓ | 39% ↑ | 37% | 50% ↑ |
| AVERAGE: | 4.5 | 4.6 | 5.1 ↑ | 4.5 | 4.5 | 4.0 ↓ |
| c) 3D movies | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 17% | 15% | 15% | 14% | 15% | 15% |
| Somewhat interested (4 to 7) | 40% | 42% | 45% | 42% | 41% | 39% |
| Not interested (1 to 3) | 43% | 43% | 40% | 43% | 44% | 47% |
| AVERAGE: | 4.4 | 4.3 | 4.4 | 4.3 | 4.2 | 4.2 |
| b) Lower budget independent films | n = 1800 | n = 3078 | n = 774 | n = 795 | n = 774 | n = 735 |
| Very interested (score 8 to 10) | 25% ↑ | 14% ↓ | 14% | 15% | 14% | 13% |
| Somewhat interested (4 to 7) | 59% | 57% | 60% | 57% | 57% | 53% ↓ |
| Not interested (1 to 3) | 17% ↓ | 29% ↑ | 27% | 28% | 29% | 34% ↑ |
| AVERAGE: | 5.8 ↑ | 4.9 ↓ | 5.0 | 5.0 | 4.8 | 4.7 ↓ |

Types of movies (cont'd)

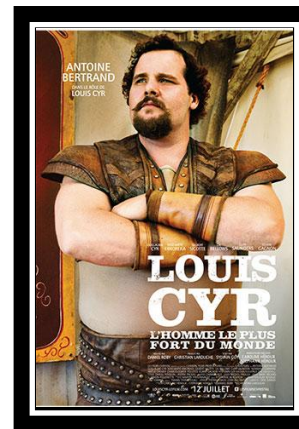
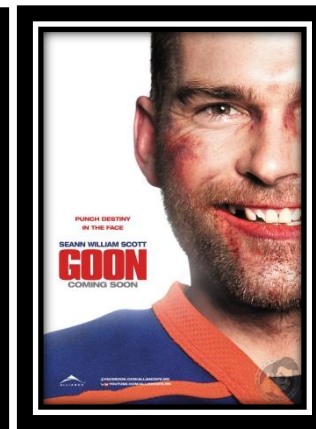
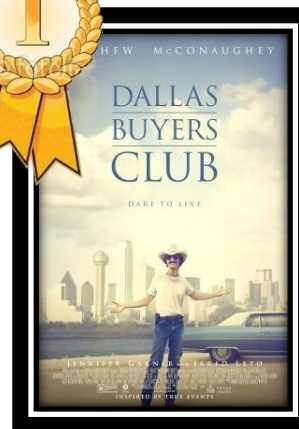
QC3. How interested are you in the following types of movies?

Statement only presented to residents of Quebec

| | Total 2014 | Age | | | | Region / Language spoken | |
|--|---------------|--------------------|--------------------|--------------------|-----------------------|--------------------------|---|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over | French-speaking Quebec | English-speaking / Rest of French-speaking Canada |
| a) Big budget Hollywood movies | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 48% | 44% | 54% ↑ | 52% ↑ | 39% ↓ | 47% | 48% |
| Somewhat interested (4 to 7) | 45% | 46% | 40% ↓ | 42% ↓ | 51% ↑ | 45% | 45% |
| Not interested (1 to 3) | 7% | 10% | 6% | 6% ↓ | 10% ↑ | 9% | 7% |
| AVERAGE: | 7.1 | 6.7 | 7.3 ↑ | 7.3 ↑ | 6.7 ↓ | 7.0 | 7.1 |
| e) Quebec movies | n = 774 | n = 29 | n = 208 | n = 266 | n = 271 | n = 662 | n = 112 |
| Very interested (score 8 to 10) | 31% | 17% | 33% | 30% | 33% | 35% ↑ | 7% ↓ |
| Somewhat interested (4 to 7) | 51% | 62% | 48% | 53% | 51% | 53% | 44% |
| Not interested (1 to 3) | 18% | 21% | 19% | 17% | 17% | 12% ↓ | 49% ↑ |
| AVERAGE: | 6.0 | 5.3 | 6.0 | 6.0 | 6.2 | 6.4 ↑ | 3.8 ↓ |
| g) Feature documentaries | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 27% | 13% ↓ | 22% ↓ | 27% | 32% ↑ | 23% ↓ | 28% ↑ |
| Somewhat interested (4 to 7) | 56% | 57% | 57% | 57% | 54% | 57% | 55% |
| Not interested (1 to 3) | 18% | 30% ↑ | 21% ↑ | 16% | 15% ↓ | 20% | 17% |
| AVERAGE: | 5.9 | 4.8 ↓ | 5.6 ↓ | 5.9 | 6.1 ↑ | 5.7 ↓ | 5.9 ↑ |
| f) Canadian movies | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 20% | 16% | 17% ↓ | 21% | 21% | 22% ↑ | 19% ↓ |
| Somewhat interested (4 to 7) | 64% | 64% | 66% | 62% | 63% | 63% | 64% |
| Not interested (1 to 3) | 17% | 20% | 17% | 17% | 16% | 14% | 17% |
| AVERAGE: | 5.6 | 5.2 ↓ | 5.5 ↓ | 5.7 | 5.7 | 5.8 ↑ | 5.6 ↓ |
| d) Foreign films | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 15% | 22% ↑ | 15% | 16% | 13% | 16% | 15% |
| Somewhat interested (4 to 7) | 49% | 49% | 50% | 50% | 47% | 60% ↑ | 46% ↓ |
| Not interested (1 to 3) | 36% | 29% | 35% | 34% | 40% ↑ | 23% ↓ | 39% ↑ |
| AVERAGE: | 4.6 | 5.1 | 4.7 | 4.7 | 4.4 ↓ | 5.2 ↑ | 4.5 ↓ |
| c) 3D movies | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 15% | 34% ↑ | 17% | 16% | 9% ↓ | 15% | 15% |
| Somewhat interested (4 to 7) | 42% | 47% | 47% ↑ | 45% | 36% ↓ | 45% | 42% |
| Not interested (1 to 3) | 43% | 19% ↓ | 36% ↓ | 39% ↓ | 55% ↑ | 40% | 44% |
| AVERAGE: | 4.3 | 6.0 ↑ | 4.7 ↑ | 4.5 ↑ | 3.6 ↓ | 4.4 | 4.3 |
| b) Lower budget independent films | n = 3078 | n = 115 | n = 756 | n = 1111 | n = 1096 | n = 662 | n = 2416 |
| Very interested (score 8 to 10) | 14% | 13% | 15% | 15% | 12% ↓ | 13% | 14% |
| Somewhat interested (4 to 7) | 57% | 58% | 56% | 59% | 57% | 62% ↑ | 56% ↓ |
| Not interested (1 to 3) | 29% | 28% | 29% | 26% ↓ | 31% ↑ | 25% ↓ | 29% ↑ |
| AVERAGE: | 4.9 | 4.9 | 5.0 | 5.0 ↓ | 4.7 ↓ | 5.0 | 4.9 |

CANADIAN FILMS HOLD THEIR OWN IN TERMS OF AWARENESS, BUT THEY DON'T STAND A CHANCE AGAINST MAJOR U.S. PRODUCTIONS

- Examples of movies of all types were presented to respondents in order to identify the most popular and most liked titles.
- **The Top 5 most popular movies include three Canadian productions:** *Goon* (2011), known by 31% of respondents, *Gabrielle*, known by 28% and *Louis Cyr*, known by 27%. However, these films are far from being as well-known as the American-made *Dallas Buyers Club*, which boasts an awareness rate of 64%. It should be noted that the popularity of this film is not very surprising considering it won several awards and a few Oscars, including one for Best Actor, just a few weeks before the survey was launched.
- Additionally, **Canadian films are generally well liked.** The best liked of these features is none other than *Louis Cyr*, which seems to have appealed to most of the moviegoers who saw it since three quarters (75%) of them reported liking it a lot. *Dallas Buyers Club* ranks second with a 69% appreciation rate followed by *Gabrielle* (59%).



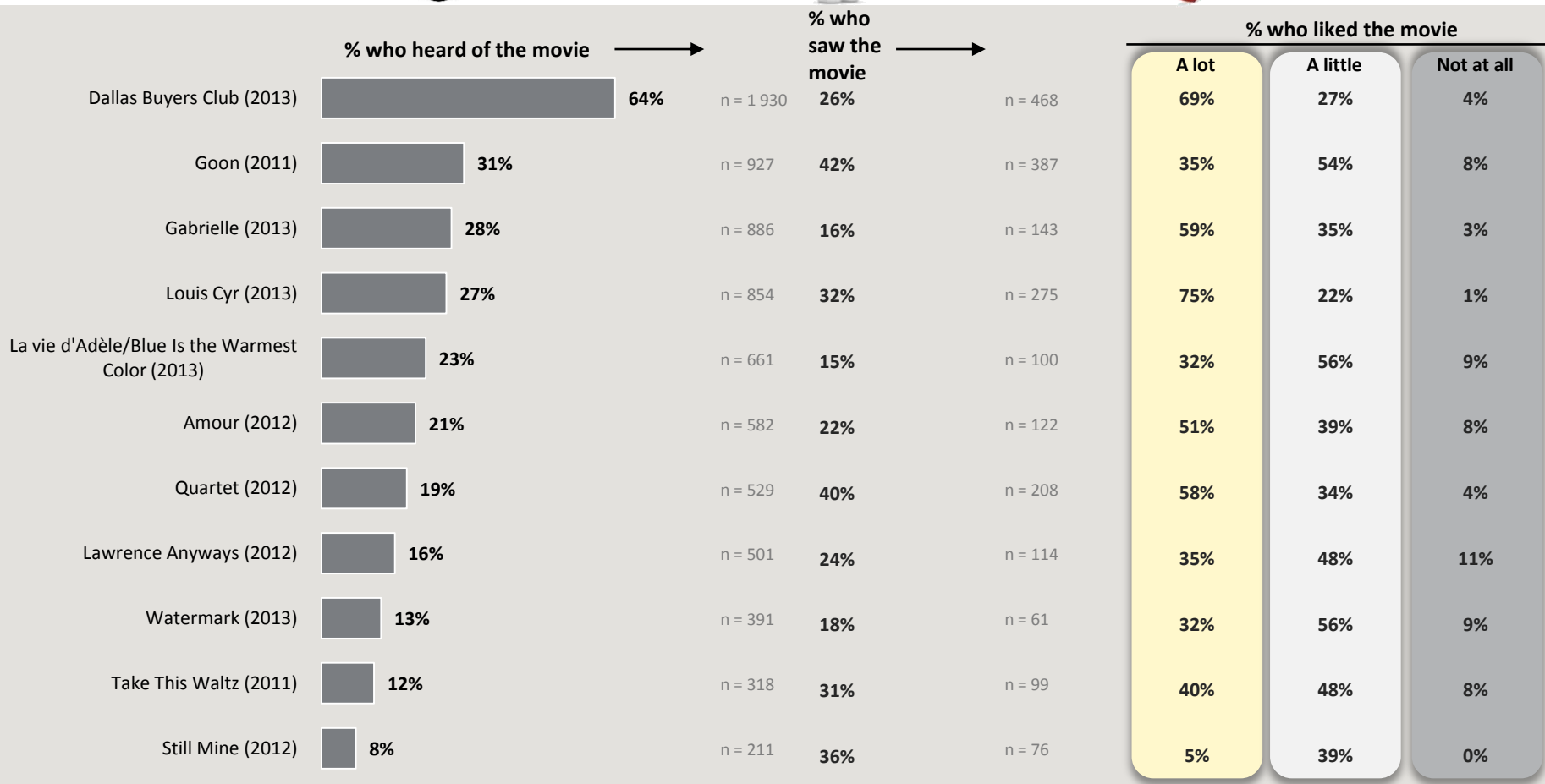
FRENCH-SPEAKING QUEBECERS ARE BETTER AT IDENTIFYING THE COUNTRY OF ORIGIN OF MOVIES THAN ENGLISH-SPEAKING CANADIANS

- Next, as was the case in last year's survey, respondents were asked **to guess the country of origin of each of the movies they had heard of** (same list as in awareness questions) simply based on their first impression. The correct and incorrect answers given reveal consumer perceptions as to each movie's country of origin.
- Just like the data showed in 2013, **these perceptions differ considerably between French-speaking Quebecers and English-speaking Canadians.**
 - **French-speaking Quebecers easily identified the Quebec-made movies**, namely *Louis Cyr* (2013) and *Gabrielle* (2013), which were recognized as such by almost all of the respondents in this segment (99% correct answers and 96% correct answers, respectively).
 - A majority (83%) of French-speaking Quebecers were also able to identify *Lawrence Anyways* (2012) as being a Canadian film compared to only 34% of English-speaking Canadians.
 - **As for English-speaking Canadians, they had more difficulty identifying the country of origin of the movies presented**, guessing correctly less than 50% of the time for most films.
- It is interesting to note that more than eight out of 10 French-speaking Quebecers report they can name a Canadian or Quebec movie (85%) or series (87%). These are impressive results compared to the data collected from English-speaking Canadians, with only 38% of them saying they can name a Canadian movie and 59% a Canadian series.

Awareness and appreciation of a few movies

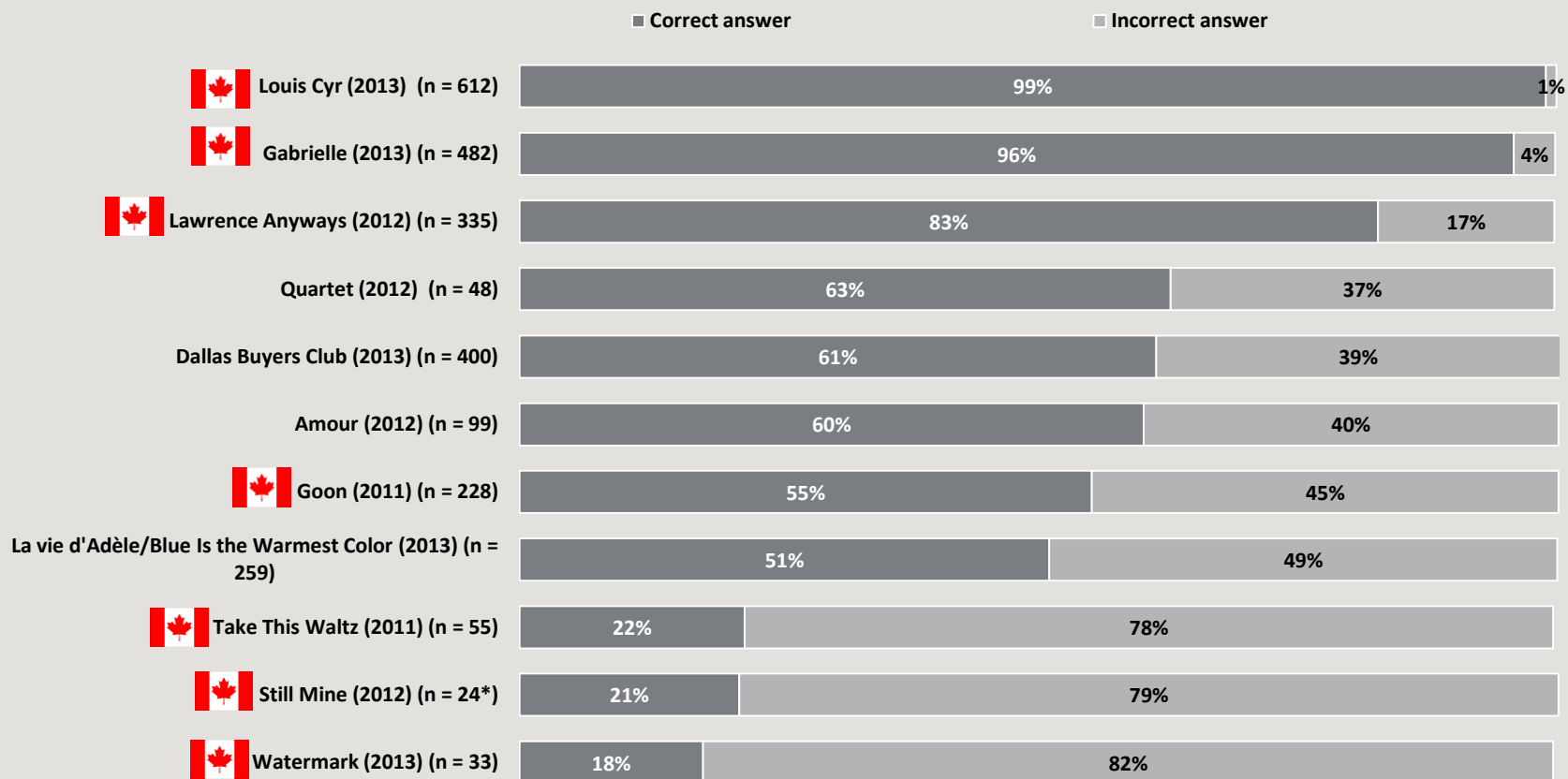
QC4. For each of the following movie titles, please indicate:

- a) If you have heard of it
- b) If you have seen it
- c) If you liked it



French-speaking Quebecers' perceptions of the country of origin of a few movies

QC4. For each of the following movie titles, please indicate: d) If you think the film is Canadian/Quebec-made

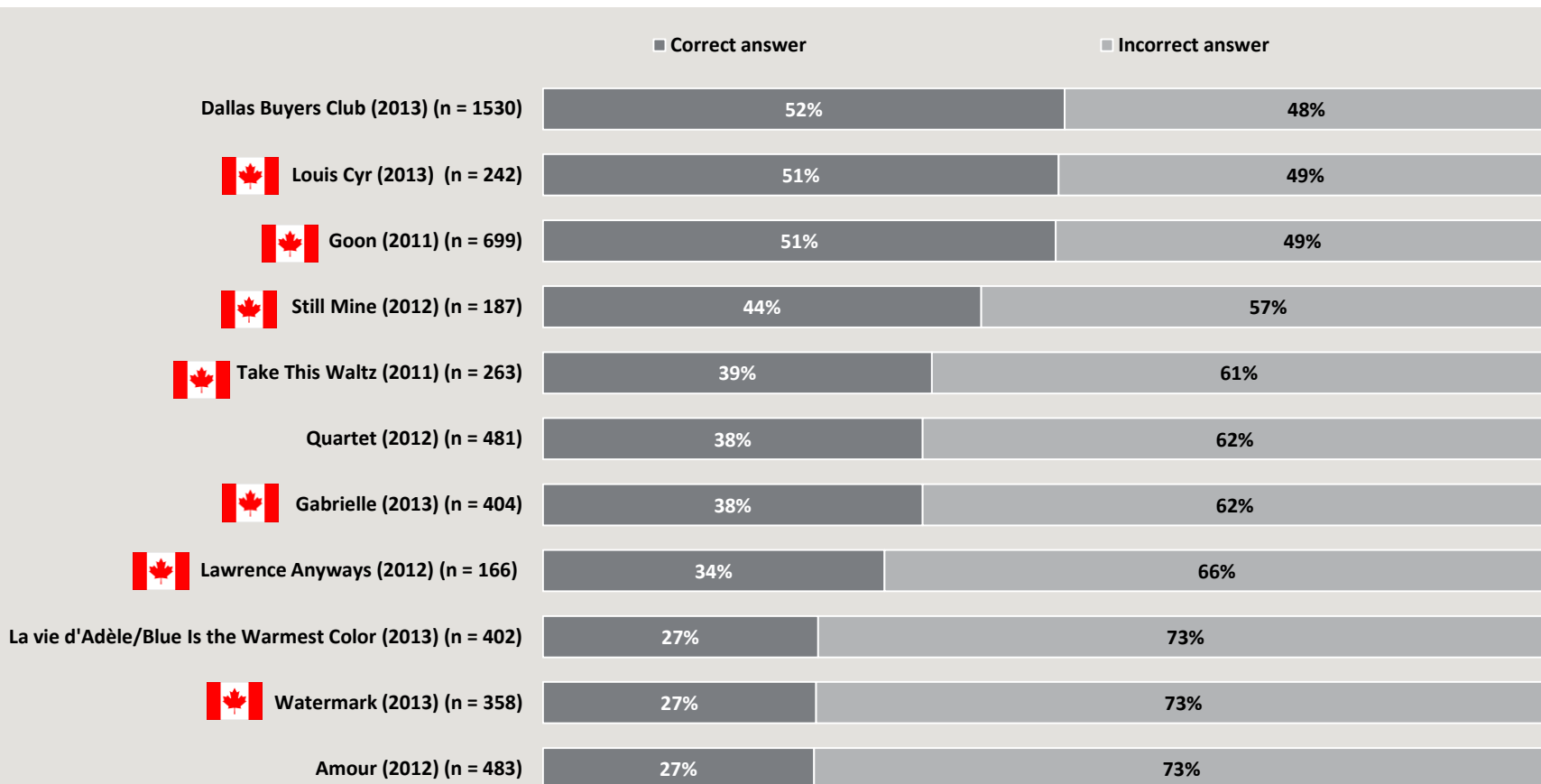


Base: All French-speaking Quebecers

*Note: These results should be interpreted with caution due to the small sample size (n < 30).

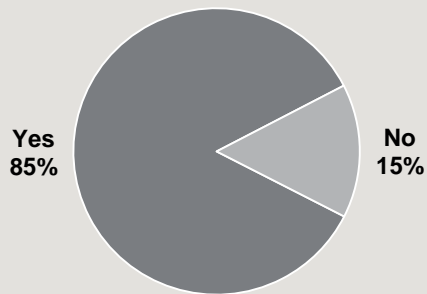
English-speaking Canadians' perceptions of the country of origin of a few movies

QC4. For each of the following movie titles, please indicate: d) If you think the film is Canadian



Remembering the title of a series or movie made in Quebec or Canada

QA13. Can you name a Canadian/French Quebec film you have seen recently?



Base: All French-speaking Quebecers (n = 659)

QA13. Can you name an English Canadian film you have seen recently?



Base: All Canadians except French-speaking Quebecers (n = 2396)

QB12. Can you name a Canadian/French Quebec TV series/soap opera?



Base: All French-speaking Quebecers (n = 622)

QB12. Can you name an English Canadian TV series/soap opera?



Base: All Canadians except French-speaking Quebecers (n = 2243)

Remembering the title of a series or movie made in Quebec or Canada (cont'd)

| | | Total 2014 | Region | | | |
|-----|---|---------------|---------|---------|-------------------|--------------------|
| | | | Quebec | Ontario | Western Canada | Atlantic Canada |
| A13 | Can name a Quebec / Canadian film | n = 659 | n = 659 | n = 0 | n = 0 | n = 0 |
| | Yes | 85% | 85% | | | |
| | No | 15% | 15% | | | |
| B12 | Can name a Quebec / Canadian TV series | n = 622 | n = 622 | n = 0 | n = 0 | n = 0 |
| | Yes | 87% | 87% | | | |
| | No | 13% | 13% | | | |

| | | Total 2014 | Age | | | |
|-----|---|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|
| | | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| A13 | Can name a Quebec / Canadian film | n = 659 | n = 22* | n = 177 | n = 217 | n = 243 |
| | Yes | 85% | 88% | 94% ↑ | 87% | 76% ↓ |
| | No | 15% | 12% | 6% ↓ | 13% | 24% ↑ |
| B12 | Can name a Quebec / Canadian TV series | n = 622 | n = 21* | n = 170 | n = 201 | n = 230 |
| | Yes | 87% | 75% | 89% | 88% | 86% |
| | No | 13% | 25% | 11% | 13% | 14% |

Base: All French-speaking Quebecers

Note: There is no data from 2013 to compare to.

*Note: These results should be interpreted with caution due to the small sample size (n < 30).

Remembering the title of a series or movie made in Quebec or Canada (cont'd)

| | | Total 2014 | Region | | | |
|-----|---|---------------|---------|---------|-------------------|--------------------|
| | | | Quebec | Ontario | Western Canada | Atlantic Canada |
| A13 | Can name a Quebec / Canadian film | n = 2396 | n = 112 | n = 784 | n = 769 | n = 751 |
| | Yes | 38% | 36% | 41% ↑ | 36% | 35% |
| | No | 62% | 64% | 59% ↓ | 64% | 65% |
| B12 | Can name a Quebec / Canadian TV series | n = 2243 | n = 103 | n = 745 | n = 730 | n = 665 |
| | Yes | 59% | 46% ↓ | 61% | 58% | 58% |
| | No | 41% | 54% ↑ | 39% | 42% | 42% |

| | | Total 2014 | Age | | | |
|-----|---|---------------|-----------------------|-----------------------|-----------------------|-----------------------------|
| | | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| A13 | Can name a Quebec / Canadian film | n = 2396 | n = 92 | n = 578 | n = 890 | n = 836 |
| | Yes | 38% | 42% | 45% ↑ | 40% | 29% ↓ |
| | No | 62% | 58% | 56% ↓ | 60% | 71% ↑ |
| B12 | Can name a Quebec / Canadian TV series | n = 2243 | n = 88 | n = 561 | n = 848 | n = 746 |
| | Yes | 59% | 46% ↓ | 57% | 60% | 62% |
| | No | 41% | 54% ↑ | 43% | 40% | 38% |

Base: All Canadians except French-speaking Quebecers

Note: There is no data from 2013 to compare to.

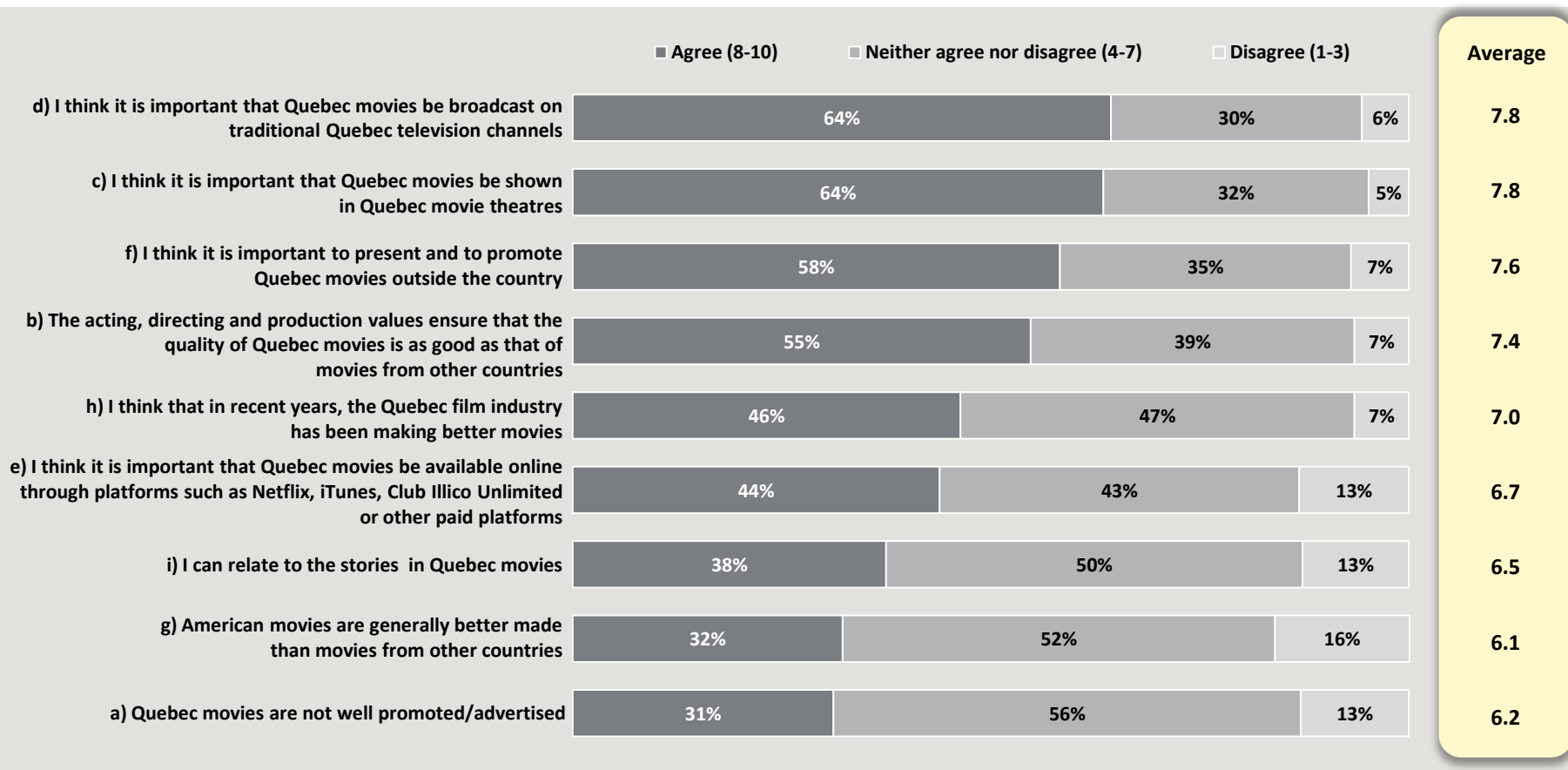
Perceptions of the industry

AS WAS THE CASE LAST YEAR, FRENCH-SPEAKING QUEBECERS HAVE A MORE POSITIVE OPINION OF THEIR FILM INDUSTRY THAN ENGLISH-SPEAKING CANADIANS HAVE OF THEIRS

- For most of the statements regarding perceptions of the industry, **French-speaking Quebecers** award **higher marks** than English-speaking Canadians. The trend being the same as in 2013, these results reveal that French-speaking Quebecers have a more positive opinion of national films and they believe it is important for these productions to be broadcast and promoted properly.
- French-speaking Quebecers seem most **concerned with local distribution** of French-language Canadian movies and series. More than three out of five respondents report it is very important for this content to be broadcast on regular TV channels in Quebec (64%) and in Quebec movie theatres (64 %).
- That being said, they also think it is important to **promote French-language Canadian movies outside the country** (58%), the majority of them being convinced the **quality of these films is just as good as those made elsewhere** (55%).
 - As for English-speaking Canadians, they tend to focus more on the **importance of promoting our movies**. According to nearly half (49%) of them, it is essential that **Canadian films be presented and promoted outside the country**. Many (45%) of them find **the current level of promotion and advertising of these films is not adequate**.
 - Also, a significant number of these respondents call for increased access to Canadian productions, claiming they would like to see them broadcast on television (48%), available online (46%) and presented in Canadian movie theatres (45%).

Perceptions of the Quebec film industry

QD1. Please indicate your level of agreement with each of the following statements about the film industry.



Perceptions of the Quebec film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total | | Region | | | |
|--|--------------|--------------|------------|---------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| d) I think it is important that Quebec movies be broadcast on traditional television channels | n = 279 | n = 662 | n = 662 | n = 0 | n = 0 | n = 0 |
| Agree | 63% | 64% | 64% | | | |
| Neither agree nor disagree | 26% | 30% | 30% | | | |
| Disagree | 10% ↑ | 6% ↓ | 6% | | | |
| AVERAGE: | 7.6 | 7.8 | 7.8 | | | |
| c) I think it is important that Quebec movies be shown in Quebec movie theatres | n = 279 | n = 662 | n = 662 | n = 0 | n = 0 | n = 0 |
| Agree | 59% | 64% | 64% | | | |
| Neither agree nor disagree | 30% | 32% | 32% | | | |
| Disagree | 12% ↑ | 5% ↓ | 5% | | | |
| AVERAGE: | 7.3 ↓ | 7.8 ↑ | 7.8 | | | |
| f) I think it is important to present and to promote Quebec movies outside the country | n = 279 | n = 662 | n = 662 | n = 0 | n = 0 | n = 0 |
| Agree | 63% | 58% | 58% | | | |
| Neither agree nor disagree | 29% | 35% | 35% | | | |
| Disagree | 8% | 7% | 7% | | | |
| AVERAGE: | 7.6 | 7.6 | 7.6 | | | |

Perceptions of the Quebec film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total 2014 | Age | | | |
|--|---------------|-----------------------|-----------------------|-----------------------|--------------------------|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| d) I think it is important that Quebec movies be broadcast on traditional television channels | n = 662 | n = 22* | n = 177 | n = 217 | n = 246 |
| Agree | 64% | 55% | 58% ↓ | 65% | 69% ↑ |
| Neither agree nor disagree | 30% | 37% | 34% | 29% | 27% |
| Disagree | 6% | 8% | 8% | 6% | 4% |
| AVERAGE: | 7.8 | 7.5 | 7.5 ↓ | 7.9 | 8.1 ↑ |
| c) I think it is important that Quebec movies be shown in Quebec movie theatres | n = 662 | n = 22* | n = 177 | n = 217 | n = 246 |
| Agree | 64% | 61% | 61% | 66% | 64% |
| Neither agree nor disagree | 32% | 35% | 33% | 31% | 31% |
| Disagree | 5% | 4% | 6% | 4% | 5% |
| AVERAGE: | 7.8 | 7.5 | 7.6 | 7.9 | 7.8 |
| f) I think it is important to present and to promote Quebec movies outside the country | n = 662 | n = 22* | n = 177 | n = 217 | n = 246 |
| Agree | 58% | 55% | 52% | 59% | 62% |
| Neither agree nor disagree | 35% | 45% | 37% | 35% | 32% |
| Disagree | 7% | 0% | 11% ↑ | 6% | 6% |
| AVERAGE: | 7.6 | 7.2 | 7.1 ↓ | 7.7 | 7.8 |

Perceptions of the Quebec film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total | | Region | | | |
|--|---|---|---|---------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| b) The acting, directing and production values ensure that the quality of Quebec movies is as good as that of movies from other countries Agree Neither agree nor disagree Disagree AVERAGE: | n = 279 50% 37% 13% ↑ 6.9 ↓ | n = 662 55% 39% 7% ↓ 7.4 ↑ | n = 662 55% 39% 7% 7.4 | n = 0 | n = 0 | n = 0 |
| h) I think that in recent years, the Canadian film industry has been making better movies Agree Neither agree nor disagree Disagree AVERAGE: | n = 0 | n = 662 46% 47% 7% 7.0 | n = 662 46% 47% 7% 7.0 | n = 0 | n = 0 | n = 0 |
| e) I think it is important that Quebec / Canadian movies be available online (Netflix, iTunes, etc.) Agree Neither agree nor disagree Disagree AVERAGE: | n = 279 53% ↑ 35% ↓ 12% 7.1 ↑ | n = 662 44% ↓ 43% ↑ 13% 6.7 ↓ | n = 662 44% 43% 13% 6.7 | n = 0 | n = 0 | n = 0 |

Perceptions of the Quebec film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total 2014 | Age | | | |
|--|---|---|---|---|--|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| b) The acting, directing and production values ensure that the quality of Quebec movies is as good as that of movies from other countries Agree Neither agree nor disagree Disagree AVERAGE: | n = 662 55% 39% 7% 7.4 | n = 22* 45% 55% 0% 7.4 | n = 177 51% 41% 8% 7.1 ↓ | n = 217 54% 39% 7% 7.4 | n = 246 60% 35% 6% 7.5 |
| h) I think that in recent years, the Canadian film industry has been making better movies Agree Neither agree nor disagree Disagree AVERAGE: | n = 662 46% 47% 7% 7.0 | n = 22* 35% 61% 4% 6.9 | n = 177 35% ↓ 55% ↑ 11% ↑ 6.4 ↓ | n = 217 47% 48% 6% 7.1 | n = 246 55% ↑ 40% ↓ 5% 7.4 ↑ |
| e) I think it is important that Quebec movies be available online (Netflix, iTunes, etc.) Agree Neither agree nor disagree Disagree AVERAGE: | n = 662 44% 43% 13% 6.7 | n = 22* 43% 47% 10% 6.8 | n = 177 47% 40% 13% 6.8 | n = 217 47% 40% 13% 6.8 | n = 246 39% 48% 13% 6.5 |

Perceptions of the Quebec film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total | | Region | | | |
|--|--------------|--------------|------------|---------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| j) I can relate to the stories in Quebec movies | n = 279 | n = 662 | n = 662 | n = 0 | n = 0 | n = 0 |
| Agree | 36% | 38% | 38% | | | |
| Neither agree nor disagree | 48% | 50% | 50% | | | |
| Disagree | 17% | 13% | 13% | | | |
| AVERAGE: | 6.3 | 6.5 | 6.5 | | | |
| g) American movies are generally better made than movies from other countries | n = 279 | n = 662 | n = 662 | n = 0 | n = 0 | n = 0 |
| Agree | 59% ↑ | 32% ↓ | 32% | | | |
| Neither agree nor disagree | 30% ↓ | 52% ↑ | 52% | | | |
| Disagree | 12% | 16% | 16% | | | |
| AVERAGE: | 7.3 ↑ | 6.1 ↓ | 6.1 | | | |
| a) Quebec movies are not well promoted / advertised | n = 279 | n = 662 | n = 662 | n = 0 | n = 0 | n = 0 |
| Agree | 25% ↓ | 31% ↑ | 31% | | | |
| Neither agree nor disagree | 54% | 56% | 56% | | | |
| Disagree | 21% ↑ | 13% ↓ | 13% | | | |
| AVERAGE: | 5.8 ↓ | 6.2 ↑ | 6.2 | | | |

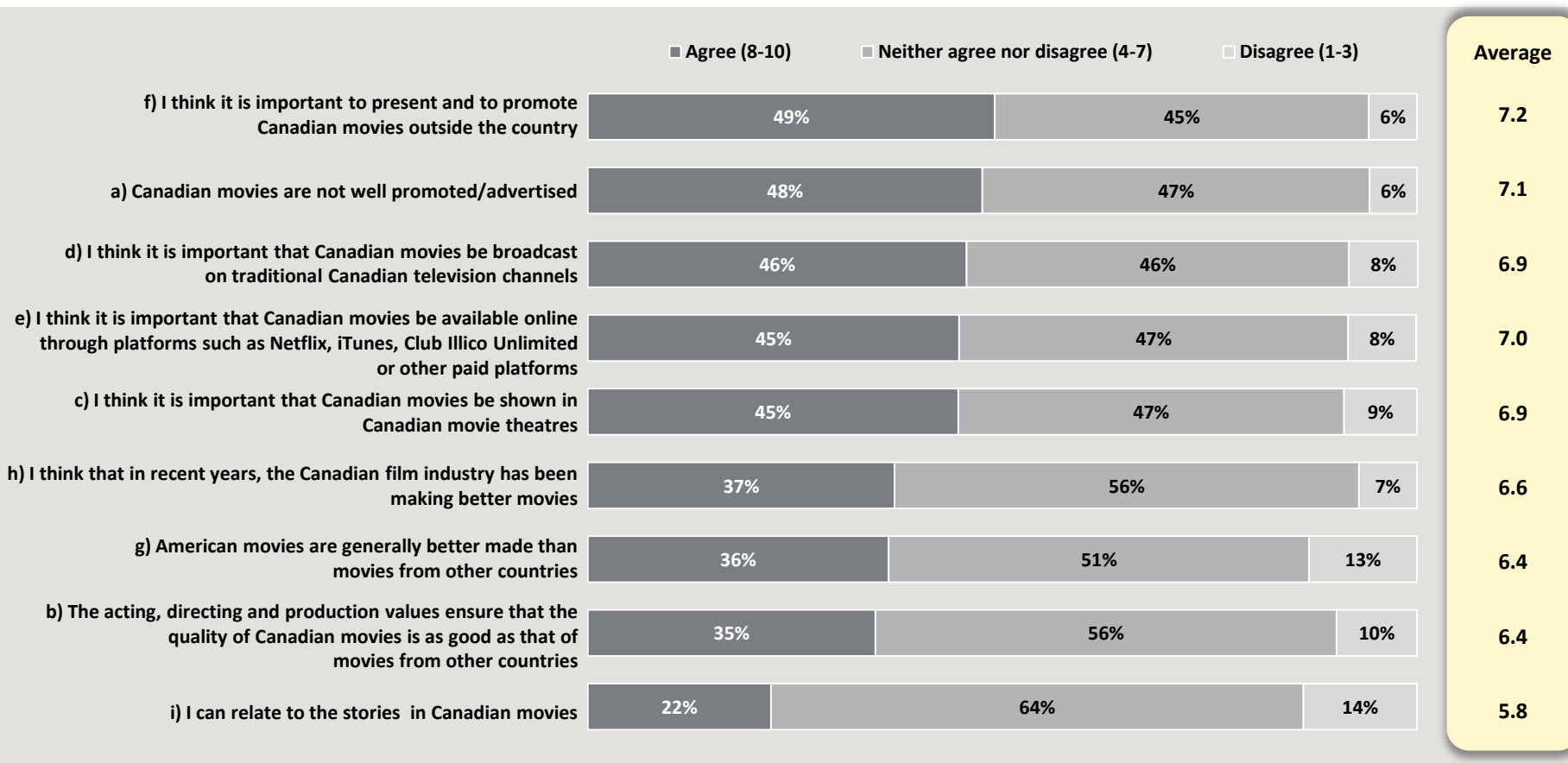
Perceptions of the Quebec film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total 2014 | Age | | | |
|--|---------------|-----------------------|-----------------------|-----------------------|--------------------------|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| i) I can relate to the stories in Quebec movies | n = 662 | n = 22* | n = 177 | n = 217 | n = 246 |
| Agree | 38% | 38% | 34% | 38% | 40% |
| Neither agree nor disagree | 50% | 53% | 50% | 50% | 49% |
| Disagree | 13% | 10% | 17% | 12% | 11% |
| AVERAGE: | 6.5 | 6.5 | 6.1 ↓ | 6.6 | 6.6 |
| g) American movies are generally better made than movies from other countries | n = 662 | n = 22* | n = 177 | n = 217 | n = 246 |
| Agree | 32% | 51% | 31% | 31% | 32% |
| Neither agree nor disagree | 52% | 22% | 54% | 52% | 53% |
| Disagree | 16% | 27% | 15% | 17% | 15% |
| AVERAGE: | 6.1 | 6.4 | 6.0 | 6.1 | 6.1 |
| a) Quebec movies are not well promoted / advertised | n = 662 | n = 22* | n = 177 | n = 217 | n = 246 |
| Agree | 31% | 39% | 28% | 29% | 34% |
| Neither agree nor disagree | 56% | 55% | 55% | 55% | 58% |
| Disagree | 13% | 6% | 17% | 16% | 8% ↓ |
| AVERAGE: | 6.2 | 6.8 | 5.8 ↓ | 6.1 | 6.5 ↑ |

Perceptions of the Canadian film industry

QD1. Please indicate your level of agreement with each of the following statements about the film industry.



Perceptions of the Canadian film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total | | Region | | | |
|---|--------------|--------------|------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| f) I think it is important to present and to promote Canadian movies outside the country | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 66% ↑ | 49% ↓ | 50% | 51% ↑ | 46% ↓ | 52% |
| Neither agree nor disagree | 31% ↓ | 45% ↑ | 44% | 43% ↓ | 49% ↑ | 43% |
| Disagree | 3% ↓ | 6% ↑ | 7% | 6% | 6% | 5% |
| AVERAGE: | 8.0 ↑ | 7.2 ↓ | 7.3 | 7.3 | 7.1 | 7.3 |
| a) Canadian movies are not well promoted / advertised | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 47% | 48% | 46% | 50% | 45% ↓ | 49% |
| Neither agree nor disagree | 44% | 47% | 49% | 45% ↓ | 49% ↑ | 46% |
| Disagree | 9% ↑ | 6% ↓ | 6% | 6% | 6% | 5% |
| AVERAGE: | 7.0 | 7.1 | 7.1 | 7.2 ↑ | 7.0 ↓ | 7.2 |
| d) I think it is important that Canadian movies be broadcast on traditional Canadian television channels | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 58% ↑ | 46% ↓ | 47% | 47% | 43% ↓ | 48% |
| Neither agree nor disagree | 37% ↓ | 46% ↑ | 48% | 45% | 48% | 46% |
| Disagree | 5% ↓ | 8% ↑ | 5% | 8% | 9% | 7% |
| AVERAGE: | 7.5 ↑ | 6.9 ↓ | 7.2 | 7.0 | 6.8 ↓ | 7.1 |

Perceptions of the Canadian film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total 2014 | Age | | | |
|---|---------------|-----------------------|-----------------------|-----------------------|--------------------------|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| f) I think it is important to present and to promote Canadian movies outside the country | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 49% | 43% | 45% ↓ | 50% | 53% ↑ |
| Neither agree nor disagree | 45% | 45% | 48% | 45% | 43% |
| Disagree | 6% | 13% ↑ | 8% ↑ | 5% | 4% ↓ |
| AVERAGE: | 7.2 | 6.7 ↓ | 7.0 ↓ | 7.3 | 7.4 ↓ |
| a) Canadian movies are not well promoted / advertised | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 48% | 43% | 50% | 49% | 45% |
| Neither agree nor disagree | 47% | 46% | 42% ↓ | 47% | 50% ↑ |
| Disagree | 6% | 11% ↑ | 8% ↑ | 5% | 5% |
| AVERAGE: | 7.1 | 6.6 ↓ | 7.2 | 7.2 | 7.1 |
| d) I think it is important that Canadian movies be broadcast on traditional Canadian television channels | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 46% | 42% | 45% | 45% | 48% |
| Neither agree nor disagree | 46% | 47% | 46% | 48% | 44% |
| Disagree | 8% | 11% | 10% | 8% | 8% |
| AVERAGE: | 6.9 | 6.7 | 6.8 | 7.0 | 7.0 |

Perceptions of the Canadian film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total | | Region | | | |
|--|--------------|--------------|------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| e) I think it is important that Canadian movies be available online (Netflix, iTunes, etc.) | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 57% ↑ | 45% ↓ | 39% | 45% | 45% | 47% |
| Neither agree nor disagree | 38% ↓ | 47% ↑ | 55% | 45% | 48% | 45% |
| Disagree | 5% ↓ | 8% ↑ | 6% | 9% | 7% | 8% |
| AVERAGE: | 7.6 ↑ | 7.0 ↓ | 6.9 | 6.9 | 7.0 | 7.0 |
| c) I think it is important that Canadian movies be shown in Canadian movie theatres | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 53% ↑ | 45% ↓ | 43% | 48% ↑ | 41% ↓ | 46% |
| Neither agree nor disagree | 40% ↓ | 47% ↑ | 48% | 44% ↓ | 50% ↑ | 46% |
| Disagree | 7% | 9% | 9% | 9% | 9% | 8% |
| AVERAGE: | 7.3 ↑ | 6.9 ↓ | 6.8 | 7.0 ↓ | 6.7 ↓ | 7.0 |
| h) I think that in recent years, the Canadian film industry has been making better movies | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 43% ↑ | 37% ↓ | 36% | 36% | 37% | 42% ↑ |
| Neither agree nor disagree | 53% ↓ | 56% ↑ | 54% | 57% | 56% | 52% ↓ |
| Disagree | 4% ↓ | 7% ↑ | 10% | 7% | 7% | 6% |
| AVERAGE: | 7.0 ↑ | 6.6 ↓ | 6.5 | 6.6 | 6.6 | 6.9 ↑ |

Perceptions of the Canadian film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total 2014 | Age | | | |
|--|---------------|-----------------------|-----------------------|-----------------------|--------------------------|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| e) I think it is important that Canadian movies be available online (Netflix, iTunes, etc.) | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 45% | 48% | 48% | 44% | 43% |
| Neither agree nor disagree | 47% | 38% | 45% | 49% | 48% |
| Disagree | 8% | 15% ↑ | 7% | 7% ↓ | 10% |
| AVERAGE: | 7.0 | 6.9 | 7.2 ↓ | 7.0 | 6.7 ↓ |
| c) I think it is important that Canadian movies be shown in Canadian movie theatres | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 45% | 45% | 44% | 44% | 46% |
| Neither agree nor disagree | 47% | 41% | 46% | 48% | 46% |
| Disagree | 9% | 13% | 9% | 8% | 9% |
| AVERAGE: | 6.9 | 6.7 | 6.9 | 6.9 | 7.0 |
| h) I think that in recent years, the Canadian film industry has been making better movies | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 37% | 31% | 31% ↓ | 36% | 44% ↑ |
| Neither agree nor disagree | 56% | 53% | 61% ↑ | 57% | 52% ↓ |
| Disagree | 7% | 17% ↑ | 9% | 7% | 4% ↓ |
| AVERAGE: | 6.6 | 6.0 ↓ | 6.3 ↓ | 6.6 | 7.0 ↑ |

Perceptions of the Canadian film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total | | Region | | | |
|--|--------------|--------------|--------------|--------------|----------------|-----------------|
| | 2013 | 2014 | Quebec | Ontario | Western Canada | Atlantic Canada |
| g) American movies are generally better made than movies from other countries | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 53% ↑ | 36% ↓ | 49% ↑ | 34% ↓ | 37% | 38% |
| Neither agree nor disagree | 40% ↓ | 51% ↑ | 41% ↓ | 53% | 50% | 50% |
| Disagree | 7% ↓ | 13% ↑ | 10% | 14% | 13% | 12% |
| AVERAGE: | 7.3 ↑ | 6.4 ↓ | 7.0 ↑ | 6.3 ↓ | 6.4 | 6.5 |
| b) The acting, directing and production values ensure that the quality of Canadian movies is as good as that of movies from other countries | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 37% | 35% | 24% ↓ | 36% | 34% | 35% |
| Neither agree nor disagree | 51% ↓ | 56% ↑ | 70% ↑ | 55% | 55% | 56% |
| Disagree | 12% ↑ | 10% ↓ | 7% | 9% | 11% | 9% |
| AVERAGE: | 6.4 | 6.4 | 6.2 | 6.5 | 6.4 | 6.5 |
| i) I can relate to the stories in Canadian movies | n = 1521 | n = 2416 | n = 112 | n = 795 | n = 774 | n = 735 |
| Agree | 25% ↑ | 22% ↓ | 16% | 22% | 22% | 27% ↑ |
| Neither agree nor disagree | 62% | 64% | 73% | 65% | 63% | 59% ↓ |
| Disagree | 13% | 14% | 12% | 13% | 15% | 15% |
| AVERAGE: | 6.0 ↑ | 5.8 ↓ | 5.7 | 5.9 | 5.7 | 5.9 |

Perceptions of the Canadian film industry (cont'd)

QD1. Please indicate your level of agreement with each of the following statements about the film industry.

| | Total 2014 | Age | | | |
|--|---------------|-----------------------|-----------------------|-----------------------|--------------------------|
| | | 15 to 17 years old | 18 to 34 years old | 35 to 54 years old | 55 years old and over |
| g) American movies are generally better made than movies from other countries | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 36% | 47% ↑ | 39% | 38% | 31% ↓ |
| Neither agree nor disagree | 51% | 40% ↓ | 49% | 51% | 53% |
| Disagree | 13% | 13% | 12% | 12% | 16% ↑ |
| AVERAGE: | 6.4 | 6.8 | 6.6 ↓ | 6.5 | 6.0 ↓ |
| b) The acting, directing and production values ensure that the quality of Canadian movies is as good as that of movies from other countries | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 35% | 30% | 27% ↓ | 33% | 44% ↑ |
| Neither agree nor disagree | 56% | 54% | 60% ↑ | 58% | 50% ↓ |
| Disagree | 10% | 16% ↑ | 13% ↑ | 9% | 6% ↓ |
| AVERAGE: | 6.4 | 5.8 ↓ | 6.0 ↓ | 6.5 | 6.8 ↑ |
| i) I can relate to the stories in Canadian movies | n = 2416 | n = 93 | n = 579 | n = 894 | n = 850 |
| Agree | 22% | 16% | 18% ↓ | 21% | 28% ↑ |
| Neither agree nor disagree | 64% | 66% | 67% | 66% | 59% ↓ |
| Disagree | 14% | 19% | 15% | 13% | 13% |
| AVERAGE: | 5.8 | 5.2 ↓ | 5.6 ↓ | 5.8 | 6.1 ↑ |

Respondent profile

Respondent profile

| | Cycle | |
|---|-------------|-------------|
| | 2013 | 2014 |
| Region | n = 1800 | n = 3078 |
| Quebec | 24% | 24% |
| Ontario | 38% | 38% |
| Western Canada | 31% | 31% |
| Atlantic Canada | 7% | 7% |
| Age | n = 1800 | n = 3078 |
| 15 to 17 years old | 5% | 5% |
| 18 to 34 years old | 27% | 27% |
| 35 to 54 years old | 35% | 35% |
| 55 years old and over | 34% | 34% |
| AVERAGE: | 46.2 | 46.5 |
| Gender | n = 1800 | n = 3078 |
| Male | 49% | 49% |
| Female | 51% | 51% |
| Language spoken | n = 1800 | n = 3078 |
| French | 21% | 22% |
| English | 75% | 75% |
| Another language | 3% | 3% |
| Region / Language spoken | n = 1800 | n = 3078 |
| French-speaking Quebec | 15% ↓ | 20% ↑ |
| English-speaking and rest of French-speaking Canada | 85% ↑ | 80% ↓ |

| | Total | |
|---|------------|------------|
| | 2013 | 2014 |
| Size of household | n = 1800 | n = 3078 |
| One person | 18% | 18% |
| Two people | 39% | 41% |
| Three people or more | 43% | 41% |
| AVERAGE: | 2.6 | 2.6 |
| Ethnicity or cultural background | n = 1800 | n = 3078 |
| White / Caucasian (Canadian, American, European, Australian, etc.) | 87% | 88% |
| Chinese | 5% | 5% |
| South Asian (Indian, Pakistani, Bangladeshi, Sri Lankan, etc.) | 2% | 2% |
| Black (African, African American, Caribbean) | 2% ↑ | 2% ↓ |
| Other Asian (Korean, Japanese, etc.) | 2% | 1% |
| North American Aboriginal (Amerindian, Inuit) | 1% | 1% |
| Southeast Asian (Cambodian, Indonesian, Laotian, Vietnamese) | 1% | 1% |
| Hispanic / Latin American (Central American, South American, Spanish) | 1% | 1% |
| Arabic / Maghrebien (Egyptian, Iraqi, Lebanese, Israeli, Moroccan, Maghrebien, Palestinian, Syrian, Algerian, etc.) | 1% | 1% |
| West Asian (Afghani, Iranian, Kurdish, etc.) | 1% ↑ | 0% ↓ |
| Other | 2% | 2% |
| Born in Canada | n = 1800 | n = 3078 |
| Yes | 85% | 85% |
| No | 15% | 15% |

Respondent profile

| | Total | |
|--|--------------|--------------|
| | 2013 | 2014 |
| Breakdown of household | | |
| Number of people age 17 or younger | n = 1800 | n = 3078 |
| None | 71% | 70% |
| 1 | 14% | 15% |
| 2 | 11% | 11% |
| 3 or more | 4% | 4% |
| AVERAGE: | 0.5 | 0.5 |
| Number of people age 18 or older | n = 1800 | n = 3078 |
| None | 0% | 0% |
| 1 | 21% | 21% |
| 2 | 56% ↓ | 59% ↑ |
| 3 or more | 23% ↑ | 20% ↓ |
| AVERAGE: | 2.1 ↑ | 2.1 ↓ |
| Main occupation | n = 1767 | n = 3015 |
| Work full time (30 hours or more per week) | 49% | 49% |
| Work part time | 10% | 10% |
| In school | 9% ↑ | 7% ↓ |
| Unemployed / Looking for work | 3% ↓ | 4% ↑ |
| Retired | 24% | 24% |
| Homemaker | 5% | 6% |
| Education | n = 1736 | n = 3010 |
| High school degree or less | 28% | 27% |
| College/CEGEP degree | 34% | 34% |
| University degree | 38% | 39% |
| Household income | n = 1422 | n = 2553 |
| Less than \$40,000 | 22% | 21% |
| \$40,000 to \$79,999 | 41% ↑ | 37% ↓ |
| \$80,000 or more | 38% ↓ | 42% ↑ |

TELEFILM CANADA

Appendices



English
Questionnaire



French
Questionnaire