

CANADIAN MOVIEGOING STATISTICS

June 2015

TELEFILM
CANADA



ERM Research

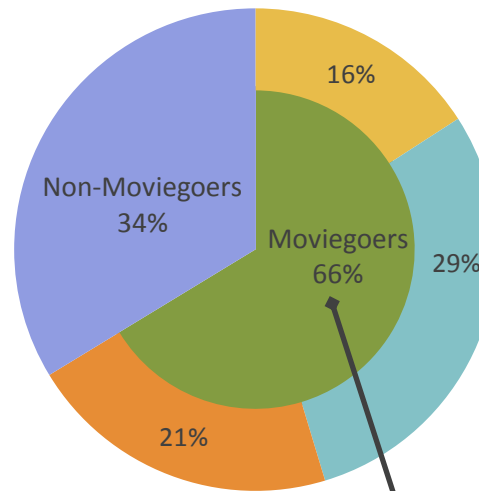
CANADIAN MOVIE TICKET CONSUMPTION BY MOVIEGOER SEGMENT

There are **20.3 million moviegoers** in Canada over the age of 13, which represents roughly two-thirds of the population. Moviegoers have seen an average of 5.1 movies in the past 12 months and can be broken down as follows:

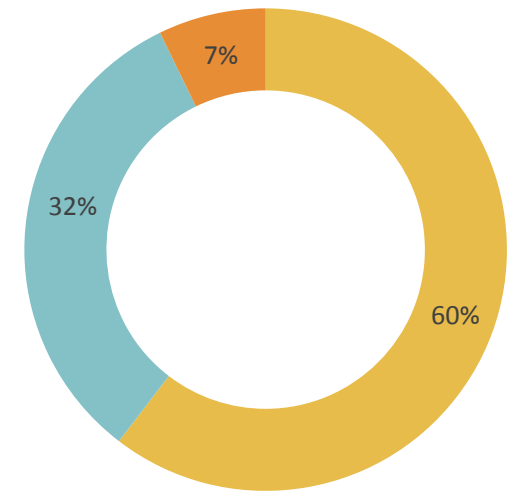
- **21% are light moviegoers** who attended one or two movies in the past 12 months
- **29% are moderate moviegoers** who attended three to nine movies in the past 12 months
- **16% are heavy moviegoers** who attended ten or more movies in the past 12 months

While heavy moviegoers represent the smallest segment, they purchased the majority of tickets—60%—in the past 12 months. Moderate moviegoers purchased roughly a third of tickets and light moviegoers account for only 7% of all ticket purchases.

MOVIE TICKET CONSUMPTION, PAST 12 MONTHS (AGE 13+)



TICKETS PURCHASED BY FREQUENCY, PAST 12 MONTHS (AGE 13+)



\bar{x} TICKETS SOLD PER MOVIEGOER

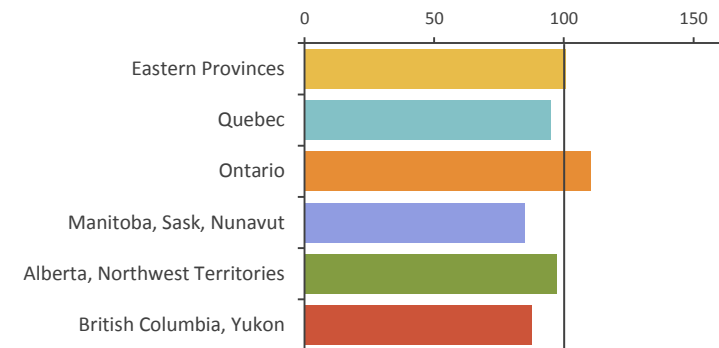
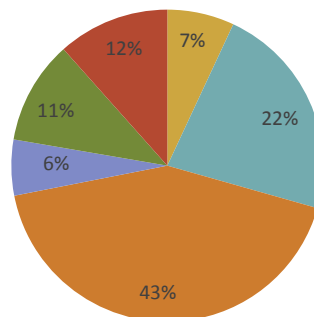
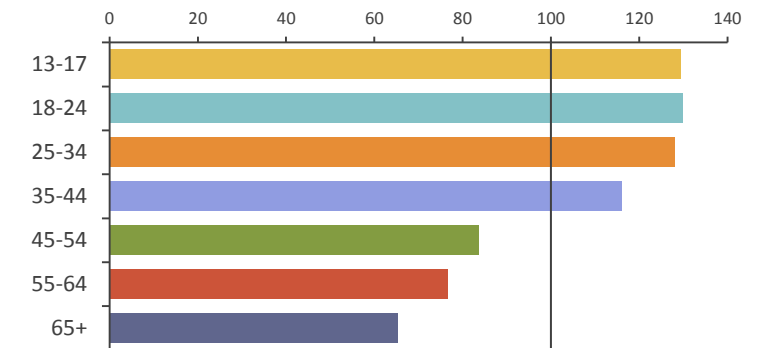
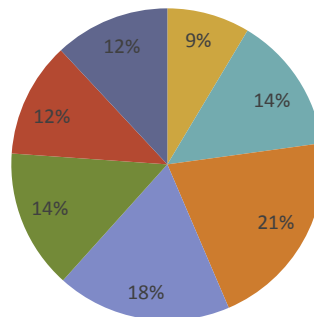
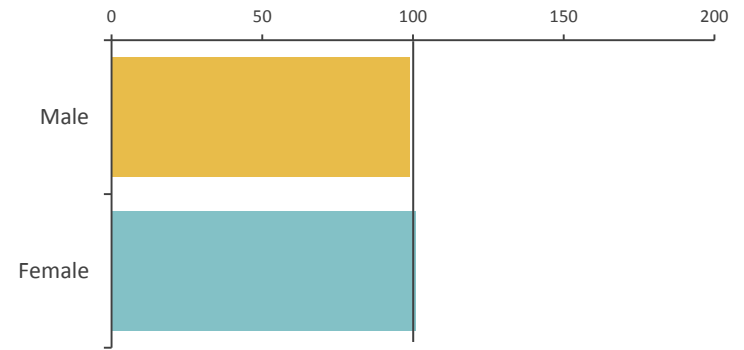
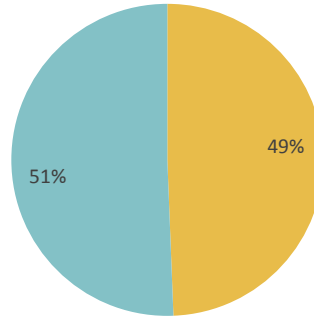
- Never (0)
- Light (1-2)
- Moderate (3-9)
- Heavy (10+)

*Q: Over the past 12 months, how many times have you been to the movies at a theatre?
Numbers may not add up to 100 due to rounding.*

DEMOGRAPHICS OF MOVIEGOERS COMPARED TO THE CANADIAN POPULATION

The demographic profile of Canadian moviegoers as they index against the general population of Canada is as follows:

- Moviegoers are nearly equally represented among males and females
- Moviegoers over index among the following younger age segments: 13 to 17, 18 to 24, 25 to 34 and 35 to 44

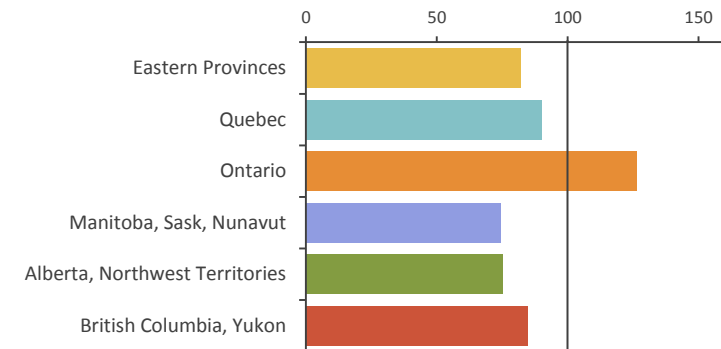
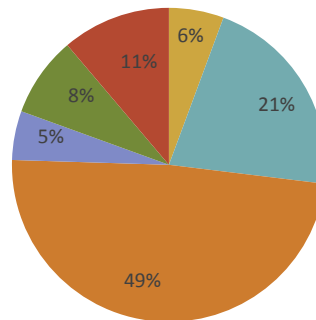
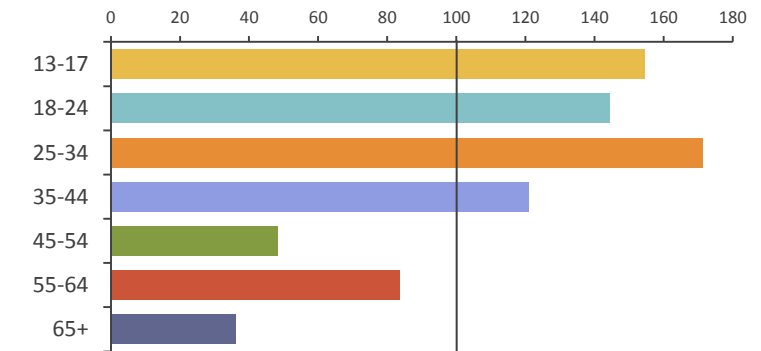
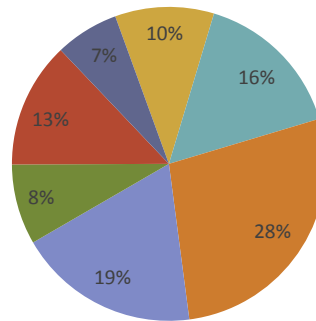
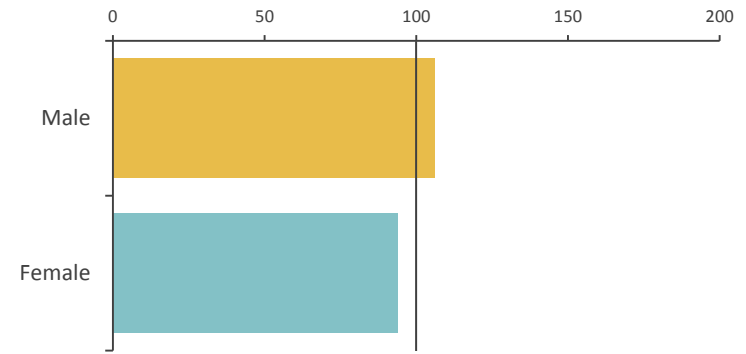
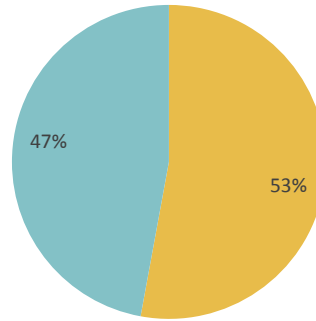


Numbers may not add up to 100 due to rounding.

HEAVY MOVIEGOERS COMPARED TO THE CANADIAN POPULATION

Among heavy moviegoers, the following segments over index:

- Males
- 25 to 34 year olds at the highest level, followed by 13 to 17 year olds, 18 to 24 year olds and 35 to 44 year olds
- By province, heavy moviegoers over index in Ontario (where 49% of all heavy moviegoers in the country reside)

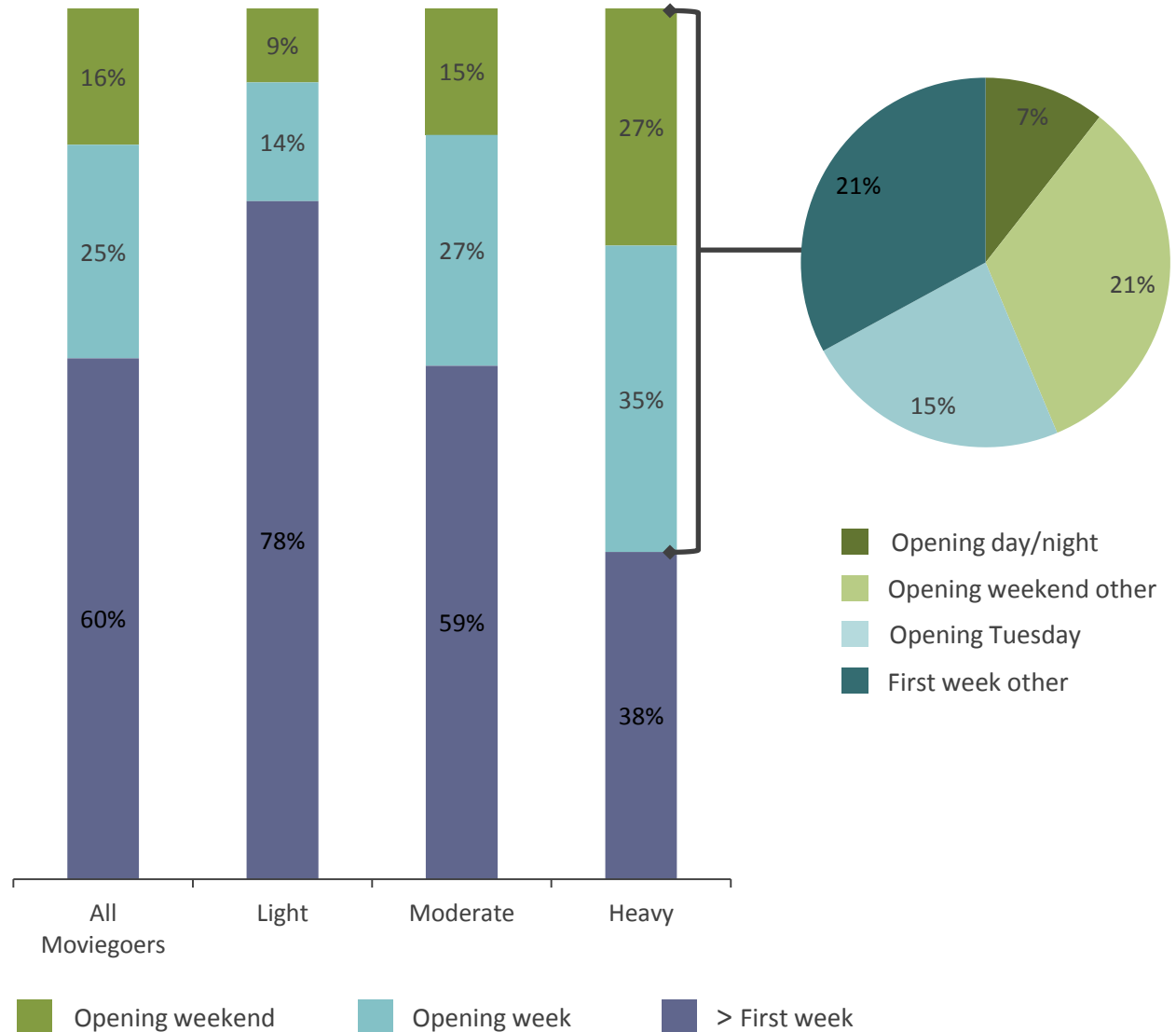


Numbers may not add up to 100 due to rounding.

WHEN MOVIEGOERS GO TO THE MOVIES (URGENCY)

On the whole, 60% of moviegoers generally see a movie after the week it opens; 16% attend on opening weekend and a quarter attend during opening week.

Urgency is highest among **heavy moviegoers**, with the majority typically attending during opening week (62%), comprising 27% who usually attend on opening weekend and 35% who usually attend some other time during opening week (with 15% attend on the first Tuesday the film is in theatres).

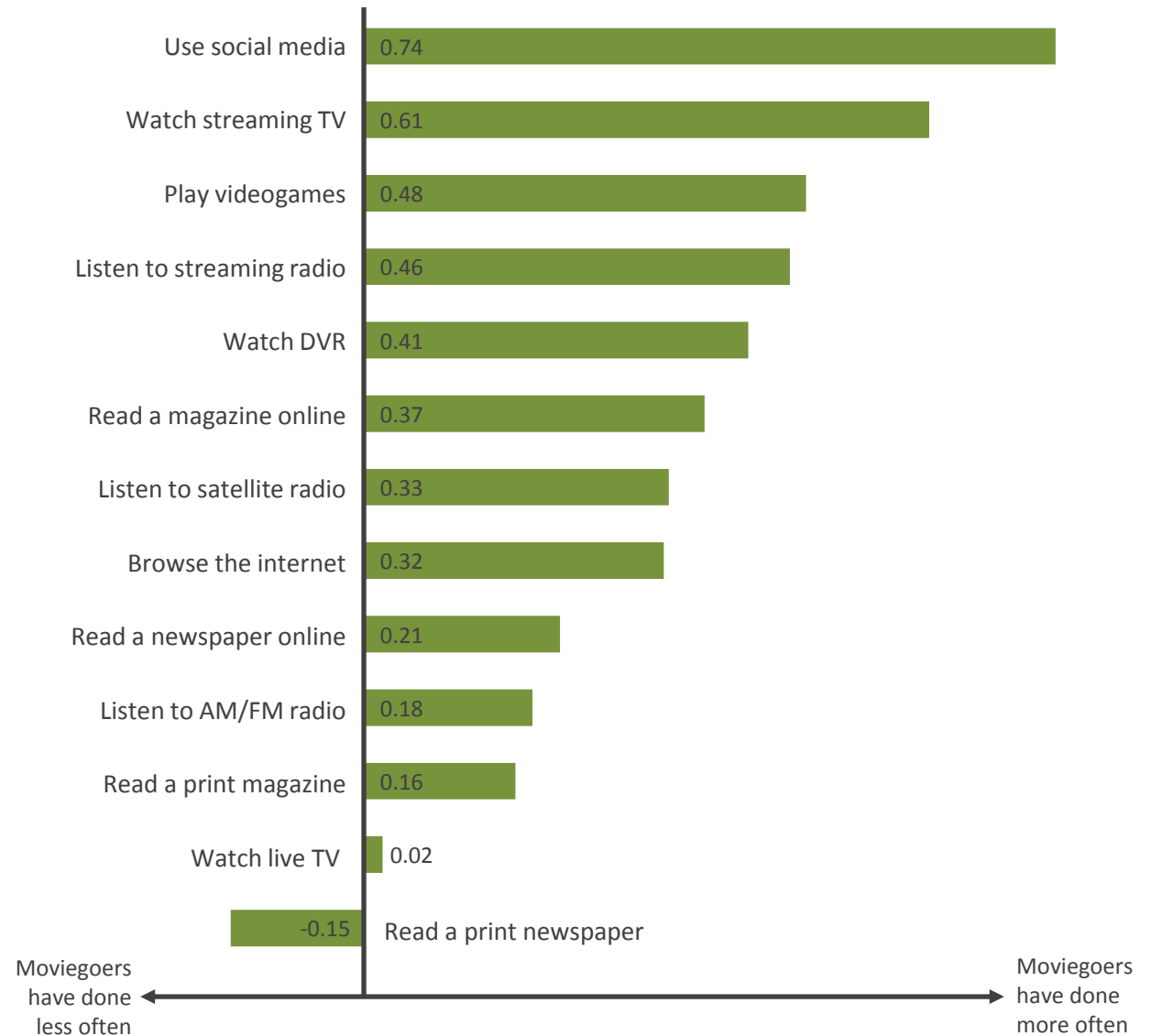


Q: Which of the statements below best describes when you generally see movies in a theatre?
 Numbers may not add up to 100 due to rounding.

MEDIA CONSUMPTION HABITS OF MOVIEGOERS VS. NON-MOVIEGOERS

Moviegoers spend more time consuming all types of media than non-moviegoers with the exception of print newspaper. The greatest difference in media consumed by this segment is for the following activities:

- Social media
- Watching streaming TV
- Playing video games
- Listening to streaming radio
- Watching DVR
- Reading a magazine online



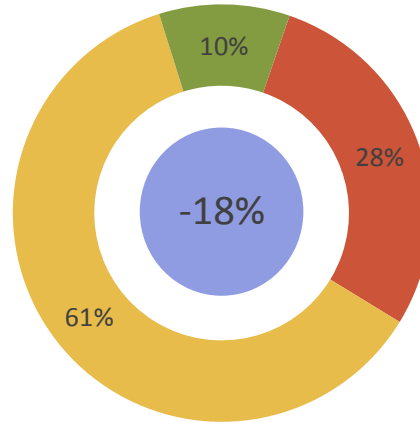
Q: In the past seven days, how often have you done each of the following?
 (Mean differences of moviegoers vs. non-moviegoers, based on five point scale from 'Never' to 'At least once per day')

CHANGE IN MOVIE ATTENDANCE OVER THE PAST 12 MONTHS

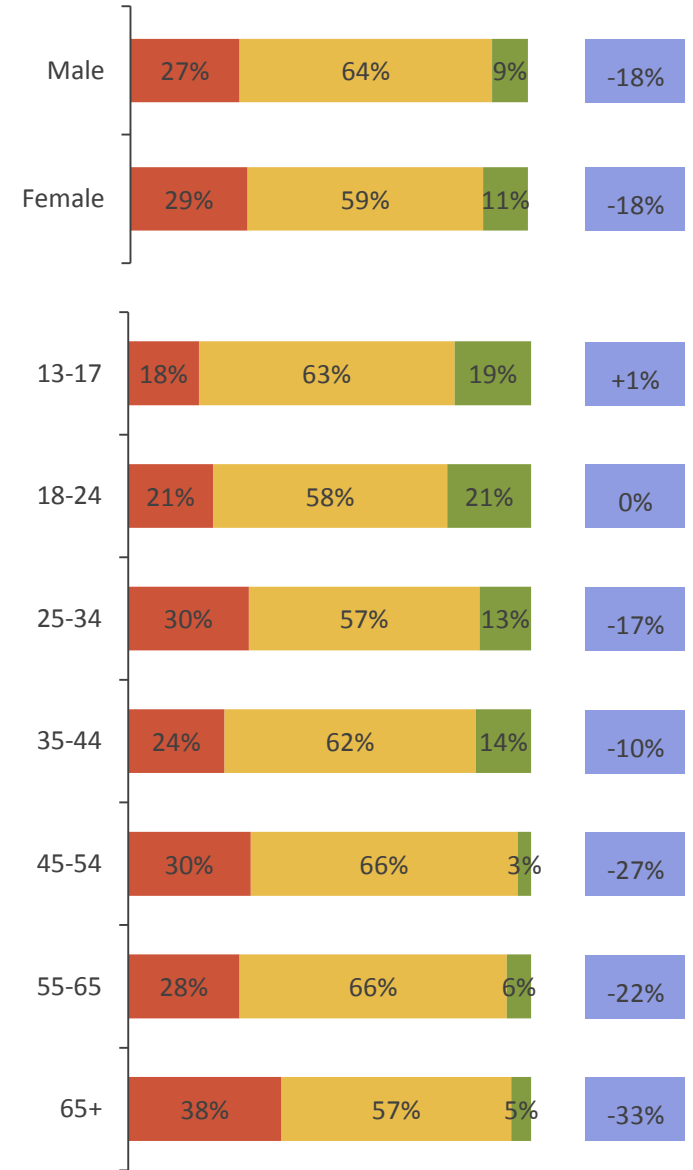
Sixty-one percent of all Canadians indicated they attended movies at the theatre in the past 12 months at comparable levels to the 12 months prior to that. Twenty-eight percent say they are attending less and 10% say they are attending more, for a net change of -18%.

The two youngest segments (13 to 17 and 18 to 24 year olds) have the highest levels of increasing attendance (19% and 21%, respectively) and, conversely, the lowest percentage of decreasing attendance (18% and 21%, respectively).

A quarter or more of all other age segments (those aged 25 and older) are attending less than previously, while fewer than 15% are attending more than they used to, resulting in a net change that is highest among 45 to 54 year olds (-27%) and those 65 and older (-33%).



- Attending more
- Attending the same
- Attending less
- Net change



Q: How does your moviegoing attendance in the past 12 months compare to your attendance in the 12 months prior to that?
Numbers may not add up to 100 due to rounding.

REASONS FOR NOT SEEING MORE MOVIES IN THE THEATRE IN PAST 12 MONTHS

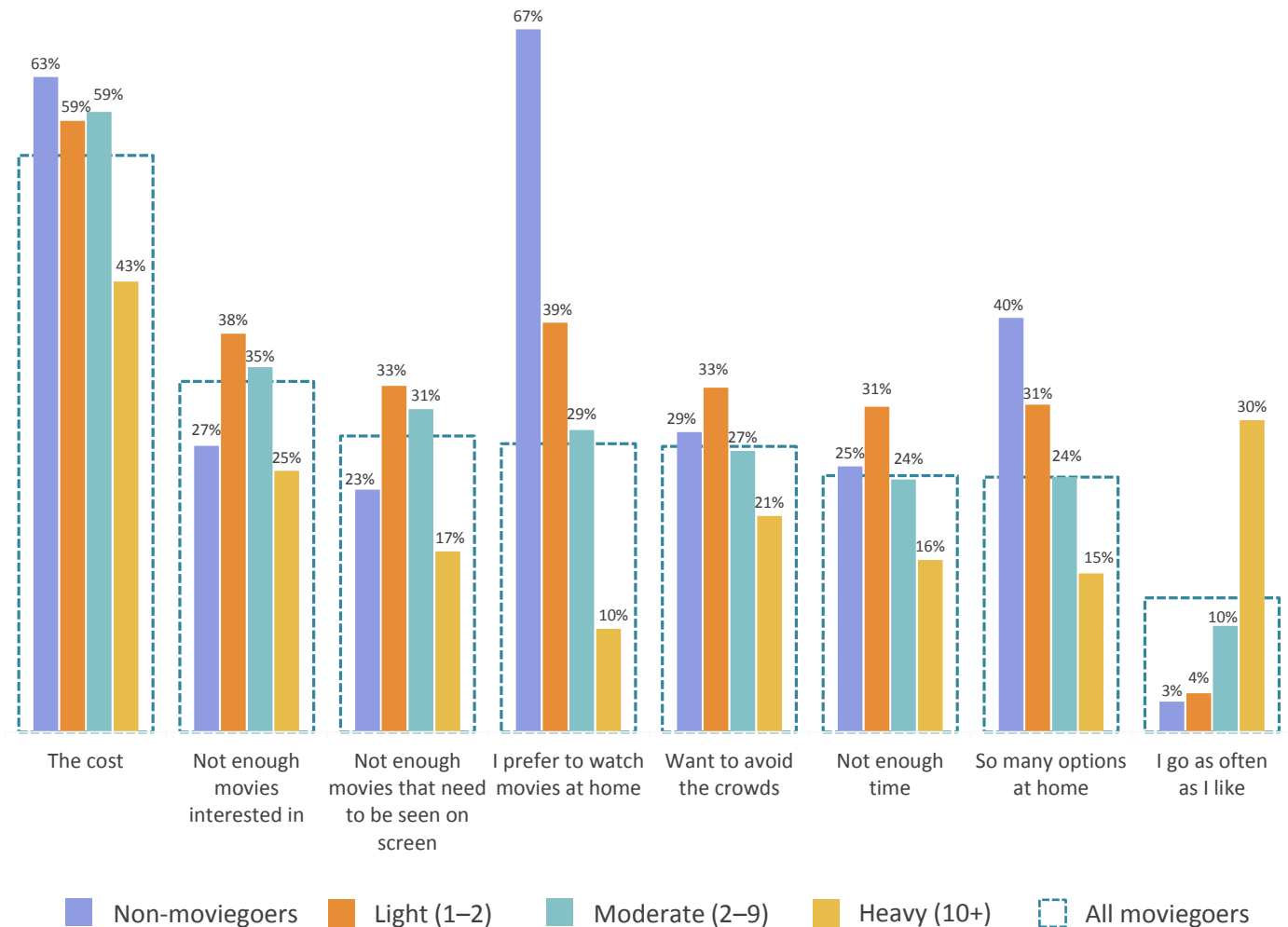
The leading reason for not attending more movies at the theatre **among non-moviegoers** is a preference for watching movies at home (67%), followed at lower levels by the cost of seeing movies at the theatre (63%) and the fact that there are so many movie viewing options at home (40%).

Among all movie-going segments, cost is the leading reason for not seeing more movies at the theatre, selected by 59% each of light and moderate moviegoers and 43% of heavy moviegoers.

After cost, **light moviegoers** indicate a preference for watching movies at home (39%) and a lack of movies they're interested in seeing at the theatre (38%).

Moderate moviegoers also indicate a lack of movies they're interested in seeing at the theatre (35%) after cost, followed by perceptions that there aren't enough movies that need to be seen on a big screen (31%).

Only 30% of **heavy moviegoers** indicate that they attend movies as often as they want.



Q: Below are some reasons others have given as to why they don't go to see movies in a theatre as much as they'd like and/or reasons they don't go as frequently as they used to. Which, if any, apply to you? Columns appear at different heights for the same numbers due to rounding.

FACTORS AFFECTING THE DECISION TO ATTEND A SPECIFIC THEATRE

The leading factors that moviegoers consider important when deciding which theatre to attend are:

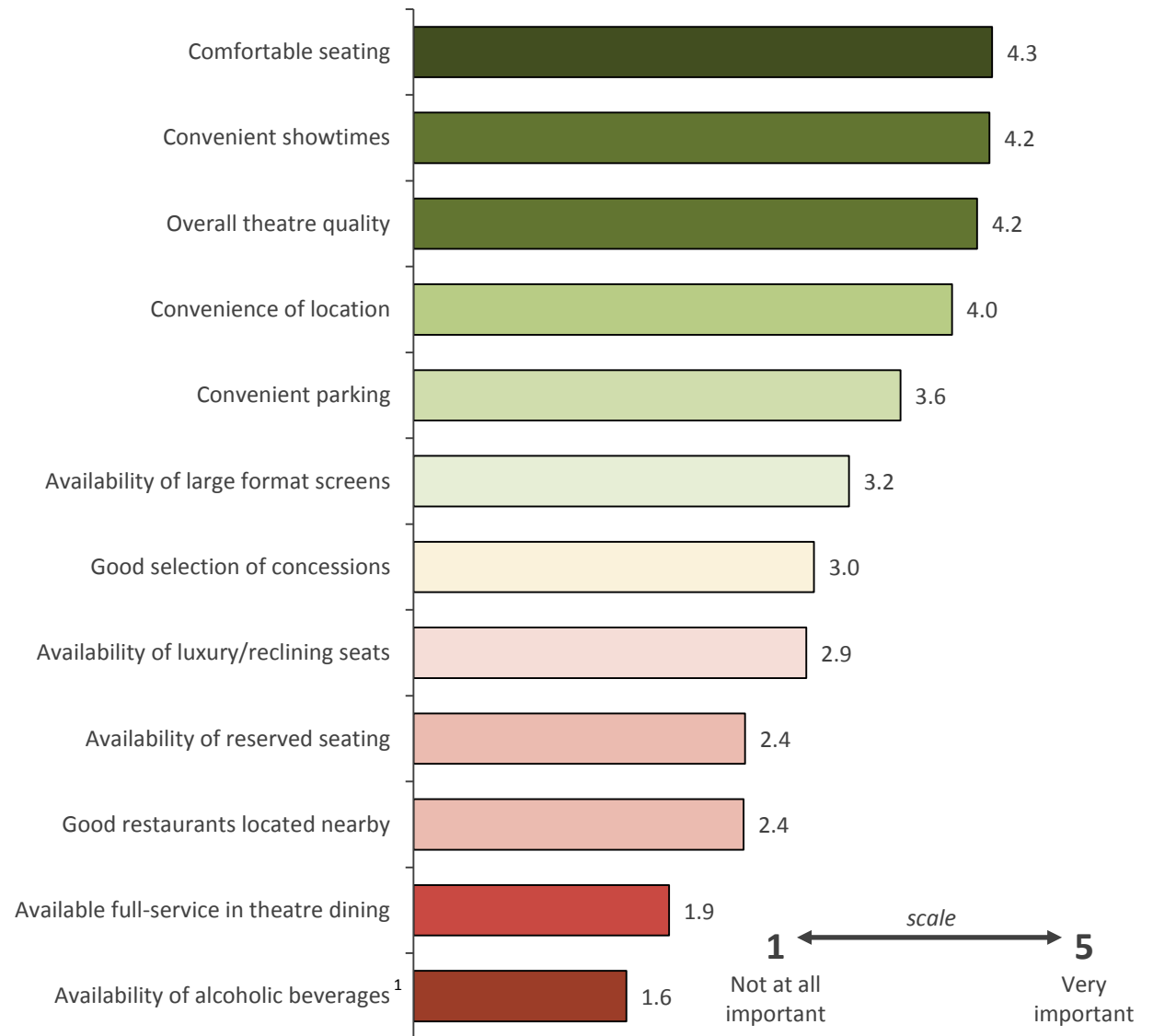
- **Comfortable seating**
- **Convenient showtimes**
- **Overall theatre quality**

More secondary considerations are:

- **Convenience of location**
- **Convenient parking**

The following factors were considered less important among moviegoers:

- Availability of large format screens
- Good selection of concessions
- Availability of luxury/reclining seats
- Availability of reserved seating
- Good restaurants located nearby
- Available full-service in theatre dining
- Availability of alcoholic beverages



Q: Below is a list of theatre-related factors some have mentioned they consider when choosing a movie to see in a theatre. Please tell us how important each are in your decision.

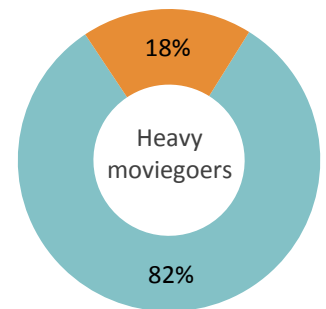
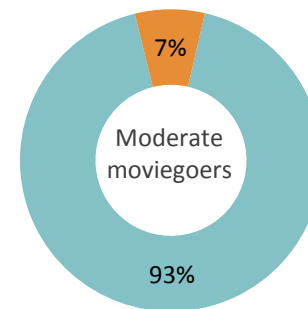
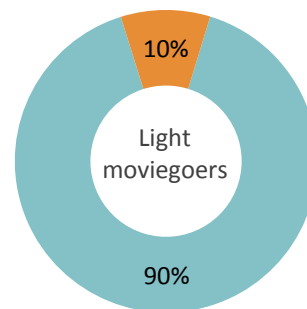
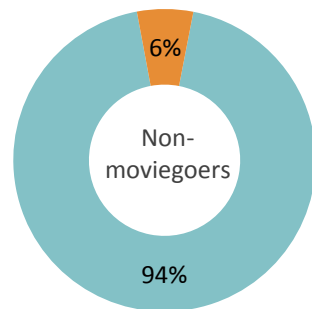
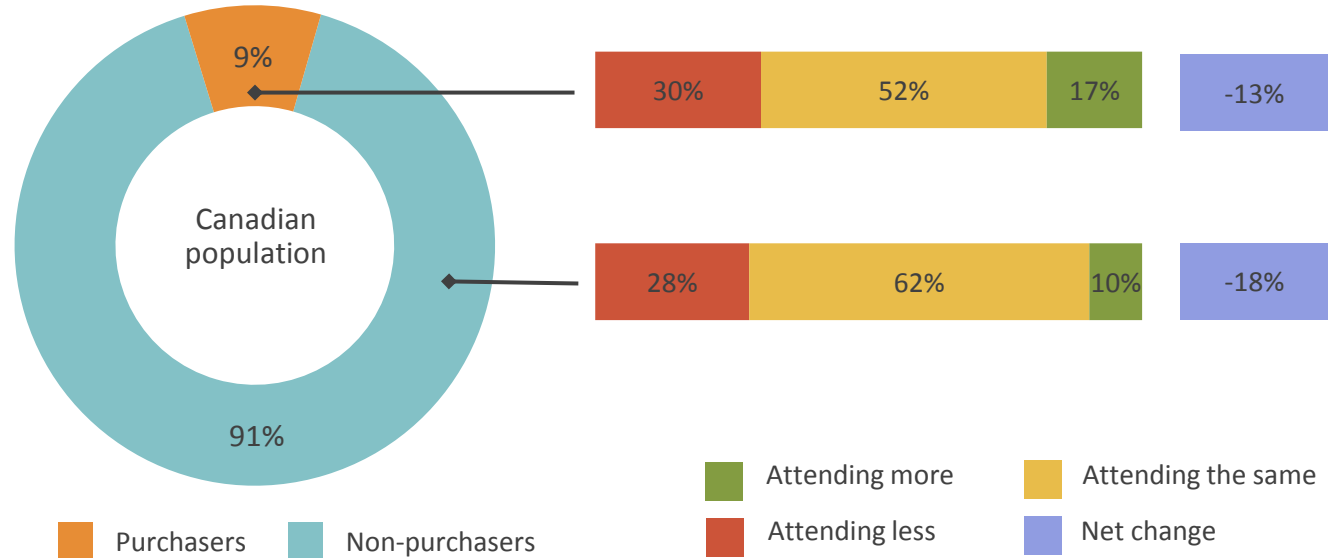
¹ Among those over legal drinking age

DAY AND DATE VOD PURCHASERS HIGHLIGHTS

Nine percent of Canadians have purchased a movie to view at home while the movie was still in theatres.

Purchasers of day and date movies indicate their movie attendance has increased in the past 12 months at a greater level (17%) compared to non-purchasers (10%).

Furthermore, heavy moviegoers are more likely to have purchased a day-and-date movie in their home than the other moviegoing segments.



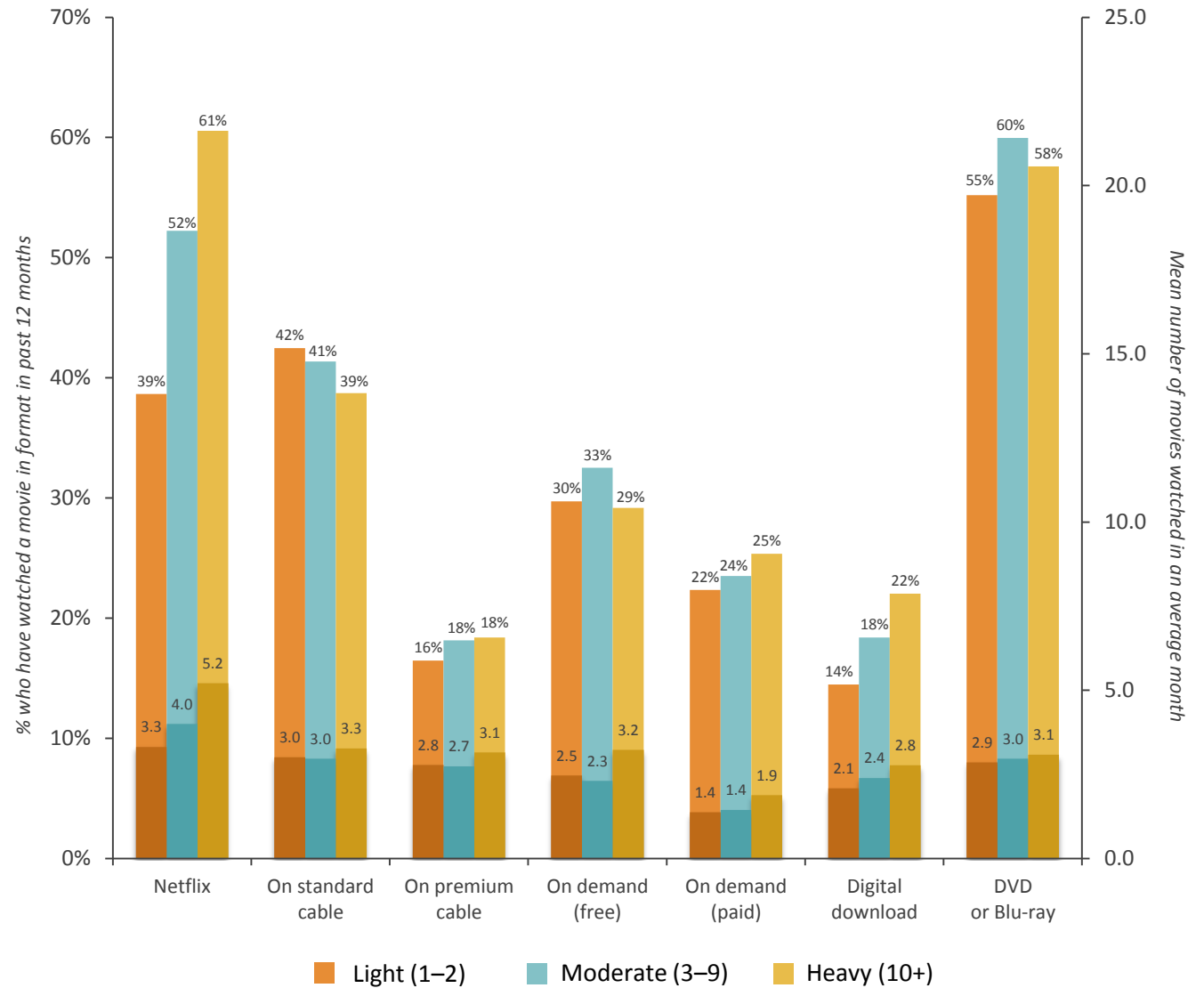
*Q: Do you recall ever paying to see a movie at home that you knew to be still playing at local theatres?
 Numbers may not add up to 100 due to rounding.*

IN-HOME MOVIE CONSUMPTION IN THE PAST 12 MONTHS BY PLATFORM USED

The platforms used most often for in-home movie viewing are:

- DVD/Blu-ray
- Netflix
- Standard cable

Heavy moviegoers watch on DVD/Blu-ray and Netflix at statistically similar levels, while **moderate and light** moviegoers watch on discs at higher levels than on Netflix.



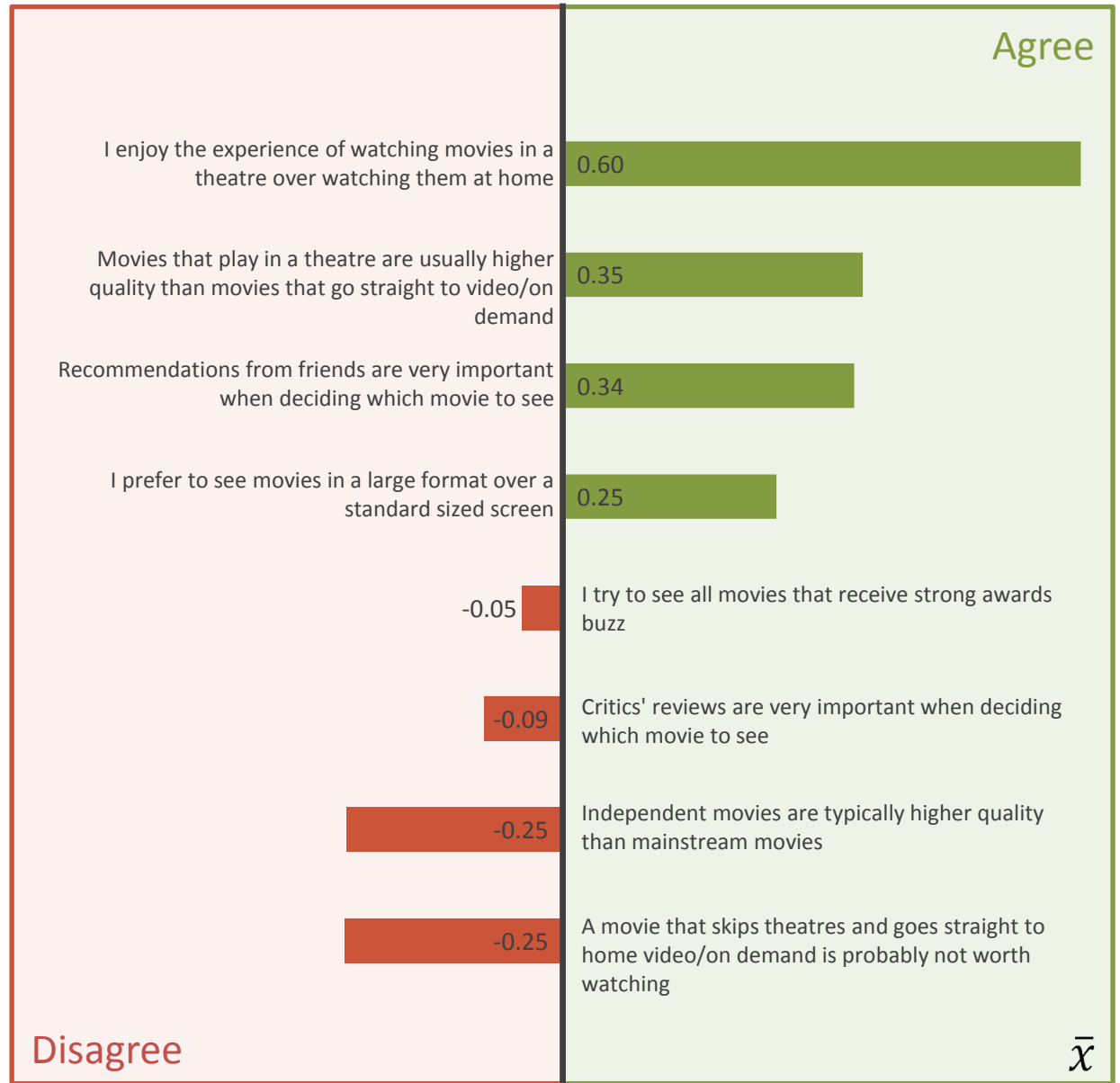
Q: In which of the following ways do you watch movies at home?
 Q: For each of the ways you indicated you watch movies at home, how many movies do you watch in the average month?
 Columns appear at different heights for the same numbers due to rounding.

HEAVY MOVIEGOERS: WHAT MATTERS MOST

More than any other factor related to the movie-going experience, **enjoying the experience of watching a movie in a theatre** generates the highest levels of agreement among heavy moviegoers.

At lower levels, heavy moviegoers agree that **movies playing in a theatre are usually higher quality than those that are released on video/on demand.**

Additionally, **viewing movies in large format (IMAX or Ultra AVX) is preferred over a standard-size screen.**



5 point scale from 'I completely agree' to 'I completely disagree' (with statements reversed for half of respondents)

METHODOLOGY

The survey was conducted among a sample of 1,870 Canadians aged 13 and older, comprising 909 men and 961 women. Interviewing was conducted beginning May 11, 2015 and ending May 26, 2015. Respondents were recruited via email and completed the survey online. Prior to analysis, any respondent who did not pass a stringent series of quality control checks was removed from the data set. The margin of error for the total sample (at a 95% confidence level) is +/- 2.3.

Data was balanced by demographics (age, gender, province and ethnicity) to match the population of Canada.

The survey collected data on the frequency of motion picture attendance in the past 12 months using the following question: "Over the past twelve months, how many times have you been to the movies at a theatre?"

The raw data collected from this survey reflect self-reported theatre attendance.

Self-reported attendance/usage frequencies are typically over-estimated by respondents. This is indeed the case for this dataset, so an adjustment constant is calculated and applied (to the total sample as well as the segments).

Segment	Sample Size	Margin of Error ¹
Total	1,870	+/- 2.3
Non-Moviegoers	587	+/- 4.0
Moviegoers	1,283	+/- 2.7
Light	389	+/- 5.0
Moderate	577	+/- 4.1
Heavy	317	+/- 5.5
Male	909	+/- 3.3
Female	961	+/- 3.2
13-17	178	+/- 7.4
18-24	237	+/- 6.4
25-34	306	+/- 5.6
35-44	327	+/- 5.4
45-54	259	+/- 6.1
55-64	324	+/- 5.4
65 +	239	+/- 6.3

¹ 95% confidence level