TELEFILM CANADA

Canadian Movie Consumption

Exploring the Health of Feature Film in Canada

October 2023

ERM Research

Introduction

ERm Research was commissioned by Telefilm Canada to conduct a study to explore the current state of feature film consumption and segment movie consumers into distinct clusters. The study was fielded from September 17 to October 2, 2023, among 2,200 qualified feature film consumers in Canada.

Employing an online study among a nationally representative sample in both English and French, ERm set out to provide an understanding of overall consumption patterns, sources of information, the decision-making process, genre preferences, barriers to watching more movies, theatrical moviegoing habits, and perceptions of Canadian content. To qualify, respondents must have watched at least one movie either at home in a typical week or visit theatres once in the past year.

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Executive Summary

The State of Canadian Movie Consumption

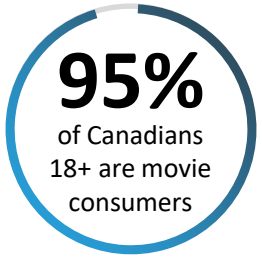
Overall, 95% of Canadians are watching feature films in some form. Though there is plenty of appetite for theatrical attendance, myriad factors are keeping movie watchers from going to theatres more often, including cost, the type of content playing, and the vast library of content accessible at home. Currently, 98% of feature film consumption is happening at home, with streaming services and broadcast TV satiating movie watchers' entertainment needs.

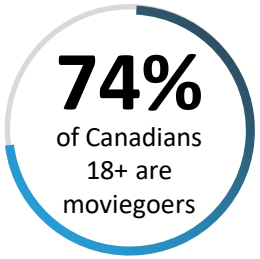
High spectacle genres are the preferred lures to cinemas, especially for younger moviegoers. By contrast, many older and more rural consumers watch an overwhelming portion of their movies in the home.

Canadian content has an important role in the marketplace for some more astute moviegoers who enjoy supporting homegrown films, regardless of the language in which they are filmed. Satisfaction with the quality of Canadian content is in line with other genres, though the appeal of Québécois content is more confined to Québec.

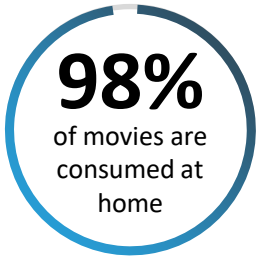
Segmenting the different types of movie watchers identifies four distinct groups, including one that does not see an urgent need to go to cinemas for more sophisticated fare like documentaries, foreign films, and dramas, and another for whom movies are less meaningful, and therefore has opted to watch movies nearly exclusively from home.

Canada Movie Consumption: By the Numbers

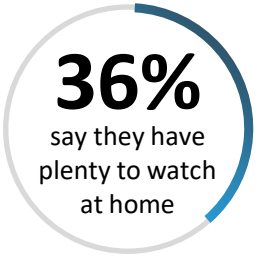




An almost universal 95% of Canadian survey respondents aged 18+ have watched one or more feature films in the past year, with nearly three-quarters seeing a movie theatrically, skewing to younger men.



Ninety-eight percent of all movies seen are watched at home. Seventy-one percent of feature films are consumed digitally, with paid streaming accounting for 54% of all consumption.



Eighty-nine percent of movie watchers polled use at least one streaming service, with most accessing multiple. Thirty-six percent say the vast array of movies available at home limits their moviegoing.

Takeaways

1 NON-MOVIEGOERS STILL WATCH A LOT OF MOVIES

The heaviest theatrical moviegoers also watch the most movies at home, averaging 1.8 movies/week, but moderate moviegoers and non-moviegoers both still watch ~1.5 movies/week in their home.

2 ACTION, SCI-FI & HORROR FEEL THEATRE-WORTHY

Action, sci-fi, and horror offer the spectacle and communal experience that makes a film feel theatrical. Most documentary, drama, comedy, family, and diverse language fans prefer those at home.

3 THEATRICAL MOVIEGOING IS A SOCIAL AFFAIR

28% of at-home viewers typically watch movies alone, whereas 46% of moviegoers typically attend in groups of three or more, creating an average at-home party size of 2.4, and 2.7 in-theatres.

4 INFLUENCERS HAVE MORE CLOUT WITH THE YOUNG

Influencers are more important for those under 35 but are still less important than professional critics. Bigger gaps between perceptions of critics and influencers emerge for those aged 35 and over.

5 CANADIAN CONTENT MORE THEATRICAL IN QUÉBEC

French Canadian movie watchers are more inclined to see Canadian content theatrically and generally have a higher opinion of Canadian films (especially Québécois film) than those outside of Québec.

6 NON-MOVIEGOERS LIKE LOWER SPECTACLE FARE

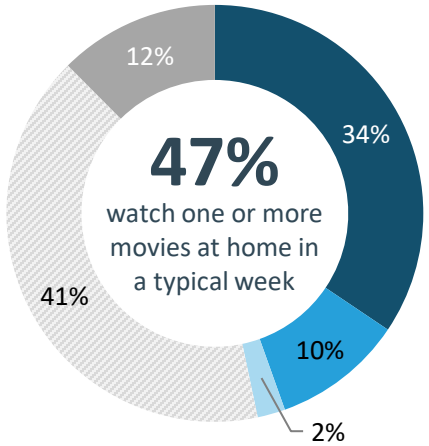
26% of movie watchers are non-moviegoers, and they over-index as fans of dramas and docs. Using fewer streaming services, they are more likely to watch movies over broadcast TV.

Feature Film Consumption

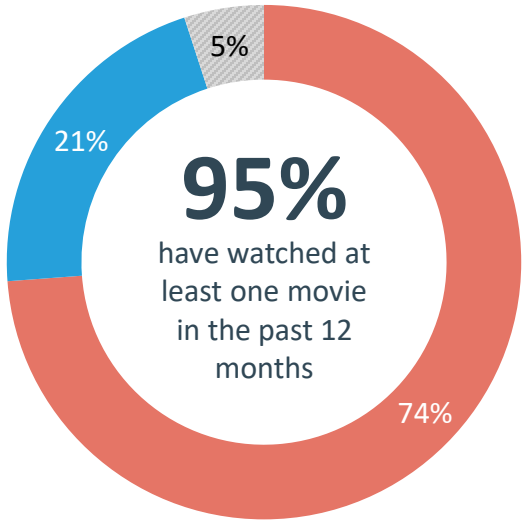
More Canadians watch movies at home than in theatres, with fewer than a third having made two or more trips to cinemas in the past 12 months. Just under half watch one movie or more per week at home.

Movie Consumption Overview

At-Home Consumption
(Per week)

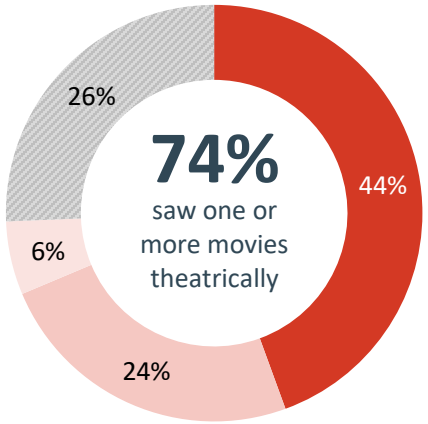


- 1–2/week
- 3–5/week
- 6+/week
- Less than 1/week
- None in a typical week



- Saw one or more movies theatrically
- Watched movies exclusively at home
- Saw no movies in the past 12 months

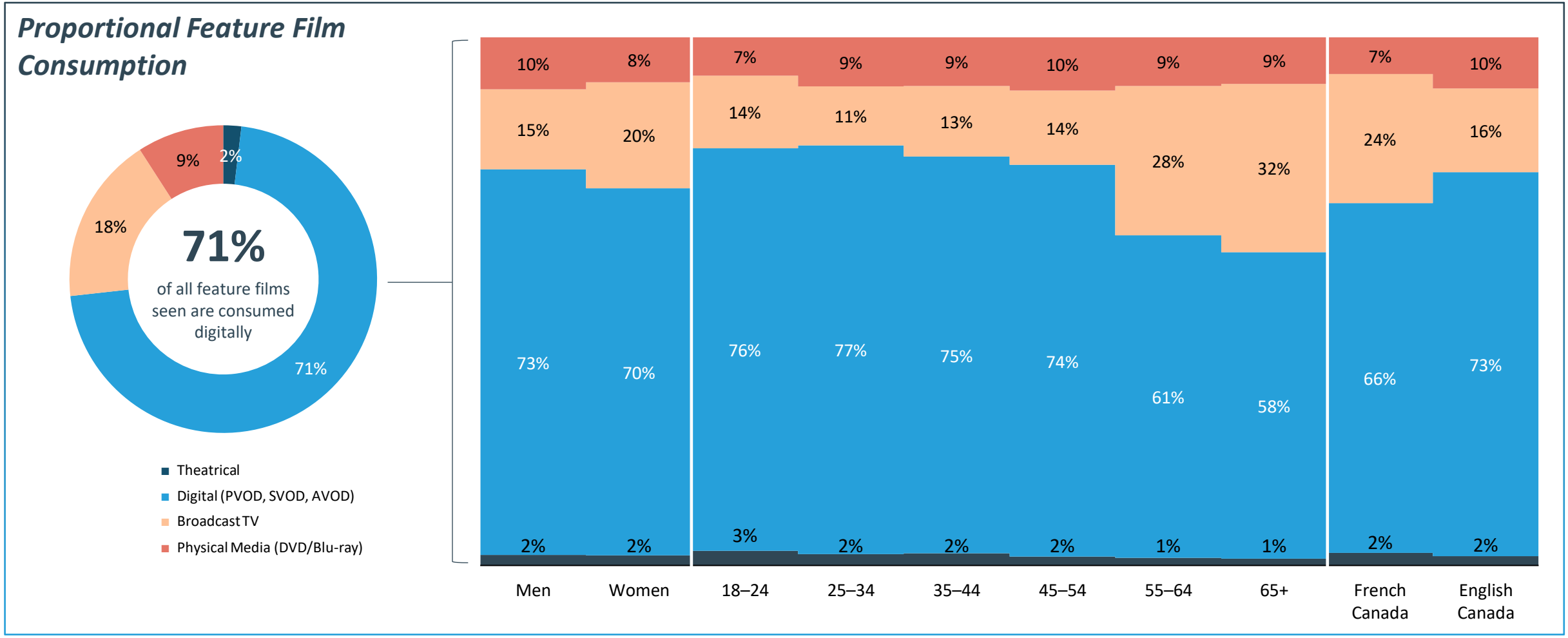
Theatrical Moviegoing
(Per year)



- 1/year
- 2–3/year
- 4+/year
- None in past 12 months

Q. How many movies did you see in a theatre over the past twelve months?
Q. How many movies did you see at home in a typical week (via streaming, TV, physical media, etc.)?

Overall, digital consumption of feature films is most prevalent, followed by broadcast TV; just 2% of all feature films are consumed theatrically. Those 55+ are least likely to watch movies digitally but utilize broadcast more than any other group.

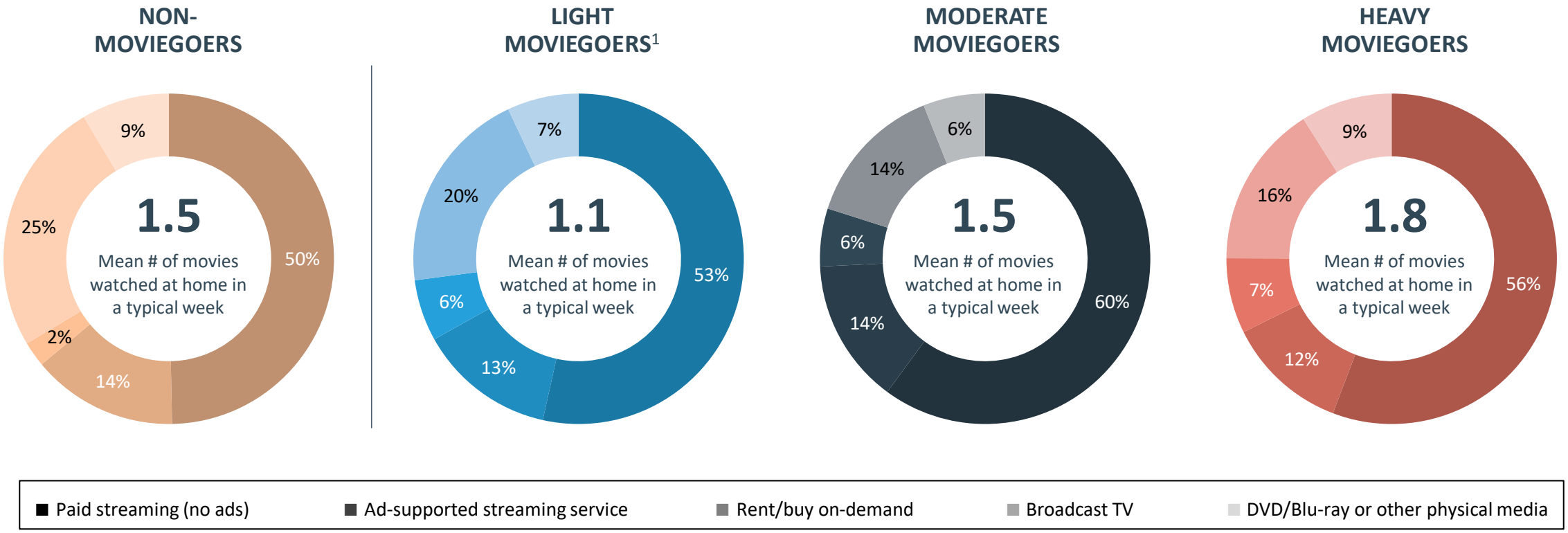


Q. How many movies did you see in a theatre over the past twelve months?
Q. In a typical week, how many movies do you watch at home (via streaming, TV, physical media, etc.)?
Q. Please indicate the proportion you watch on each of the following.

The heaviest moviegoers tend to watch the most films at home as well, but non-moviegoers still watch movies at a relatively high rate.

At-Home Feature Film Consumption

(By theatrical movie consumption)



Q. What proportion of the movies you watch at home do you watch on each platform?

1. Heavy moviegoers are those who self-report having seen 10+ movies theatrically in the past 12 months. Moderates report four to nine movies, while light moviegoers report one to three movies.

Men slightly over-index on feature film consumption overall. Theatrical attendance skews younger, while at-home watching is relatively even. Movie watchers in Québec over-index on theatrical viewership, and under-index for at-home consumption.

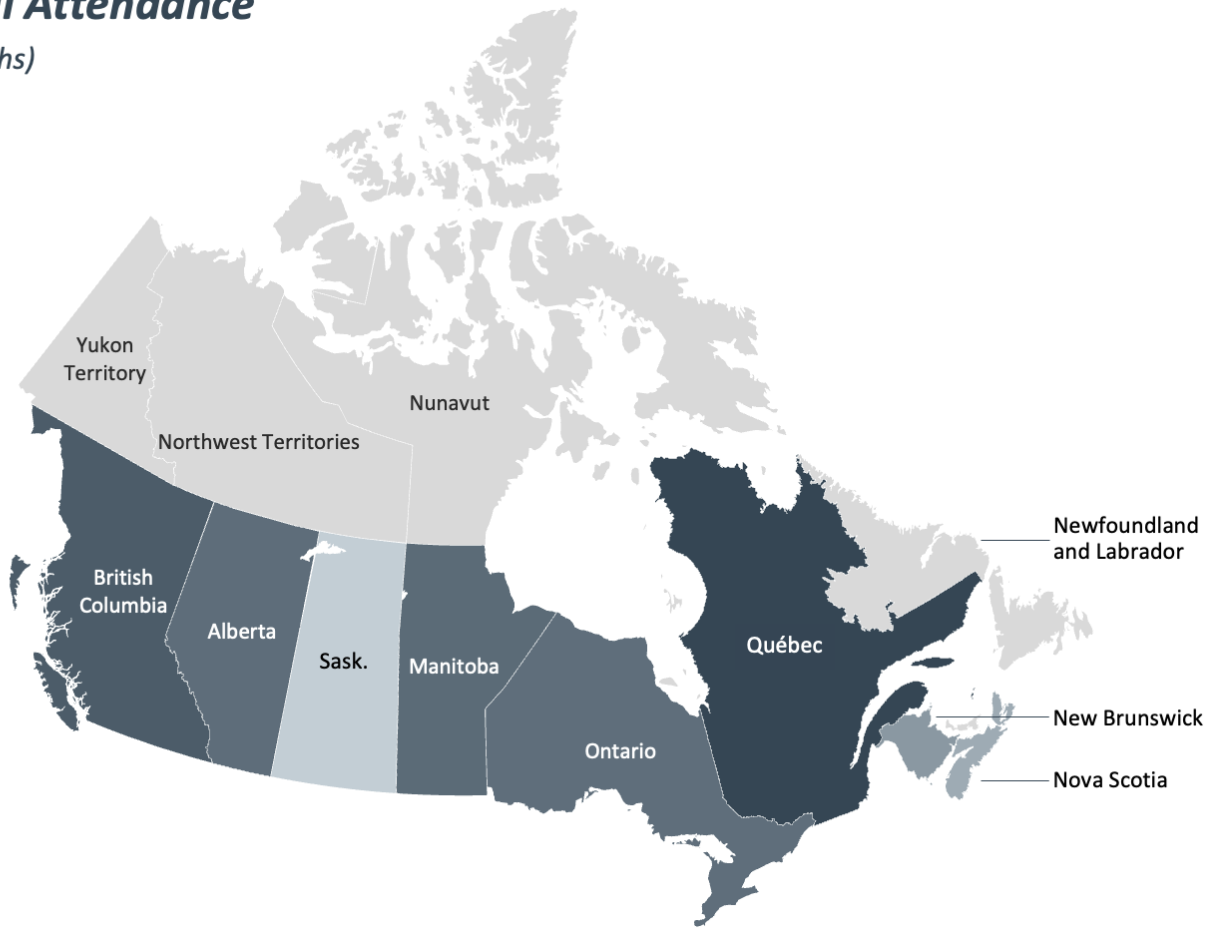
Mean # of movies watched:	In-theatres (past year)	Theatrical Moviegoer Index	At-home (typical week)	Home Viewer Index
TOTAL	1.4	*An index over 100 indicates a segment with higher feature film consumption in theatres.*	1.4	*An index over 100 indicates a segment with higher feature film consumption at home.*
GENDER				
Men	1.4	106	1.4	104
Women	1.3	95	1.3	97
AGE				
18–24	1.9	138	1.3	95
25–34	1.6	115	1.4	103
35–44	1.6	115	1.3	96
45–54	1.2	91	1.4	107
55–64	1.0	74	1.4	101
65+	0.8	61	1.3	94
REGION				
English Canada	1.3	96	1.2	103
French Canada	1.6	114	1.4	90

Q. How many movies did you see in a theatre over the past twelve months?
Q. In a typical week, how many movies do you watch at home (via streaming, TV, physical media, etc.)?

Around three-quarters of all Canadians saw at least one film in theatres in the past year. Québec has the largest percentage of consumers visiting movie theatres, while Saskatchewan and Nova Scotia have the smallest.

Theatrical Attendance

(Past 12 Months)



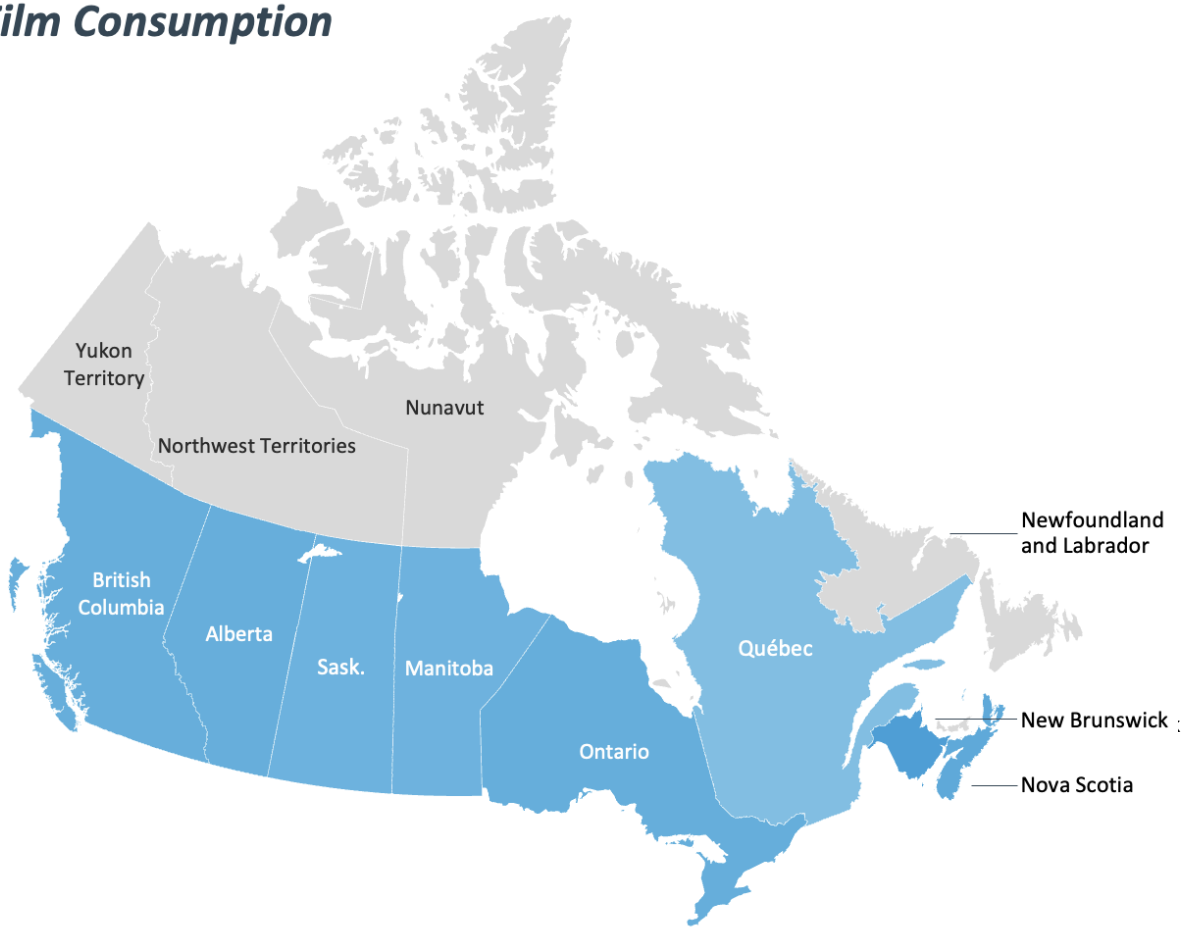
% Attend 1+ Per Year	
National	**74%**
Alberta	73%
British Columbia	77%
Manitoba	73%
New Brunswick	61%
Nova Scotia	55%
Ontario	72%
Québec	83%
Saskatchewan	46%

Q. How many movies did you see in a theatre over the past twelve months?
Small sample sizes in greyed-out provinces preclude meaningful analysis.

Just under half of all Canadians watch at least one feature film at home in a typical week. Those in Québec are generally less frequent in their at-home movie consumption, with only around four in ten watching one or more movies per week.

Feature Film Consumption At Home

(Per Week)



% Watch 1+ Per Week	
National	**47%**
Alberta	48%
British Columbia	48%
Manitoba	46%
New Brunswick	55%
Nova Scotia	50%
Ontario	48%
Québec	41%
Saskatchewan	46%

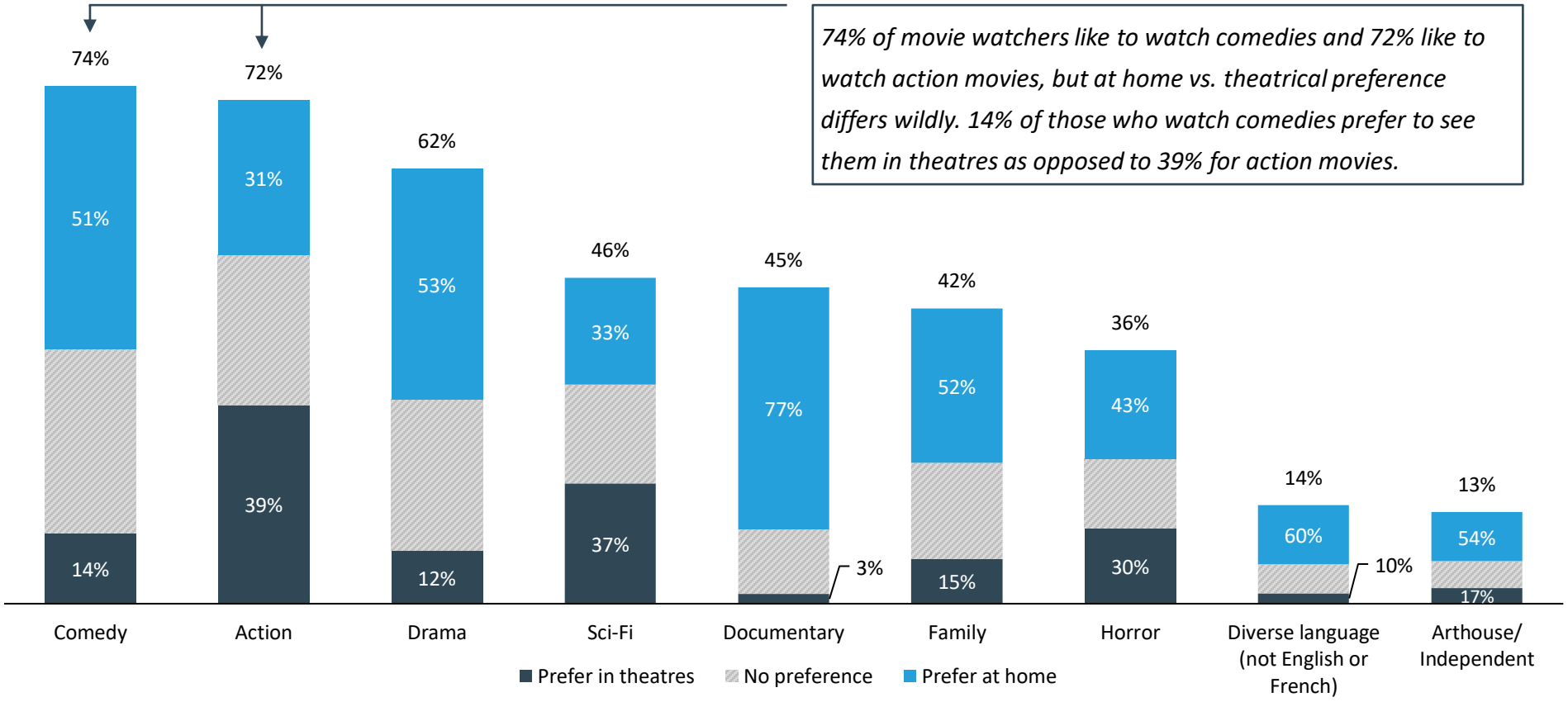
Q. In a typical week, how many movies do you watch at home (via streaming, TV, physical media, etc.)?
Small sample sizes in greyed-out provinces preclude meaningful analysis.

Genre Preferences & Canadian Content

Genre Interest & Viewing Preferences

Theatrical vs. at-home viewing preferences

Comedy and action are the favourite genres, with fans of action and sci-fi most preferring to see those films in a theatrical setting. Documentaries, family, drama, and diverse language films are perceived as better fits for home viewing.



74% of movie watchers like to watch comedies and 72% like to watch action movies, but at home vs. theatrical preference differs wildly. 14% of those who watch comedies prefer to see them in theatres as opposed to 39% for action movies.

Q. Which of the following movie genres do you typically like to watch, either at home or in theatres?
Q. Where do you prefer to watch them?

Genre Interest

Those who typically watch each genre (either theatrically or at home) by gender and age.

Men are more likely to watch action, sci-fi, and documentary films, while women over-index as fans of dramas and family movies. Interest in dramas skews older (55+) while horror trends to consumers under 35.

	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+
Comedy movies	74%	73%	74%	75%	77%	78%	72%	68%	70%
Action movies	72%	**80%**	64%	64%	69%	73%	75%	74%	72%
Drama movies	62%	55%	**69%**	46%	57%	61%	63%	**71%**	**75%**
Sci-fi movies	46%	**59%**	34%	41%	48%	48%	48%	46%	43%
Documentary movies	45%	**47%**	42%	28%	42%	48%	47%	50%	52%
Family movies	42%	32%	**52%**	46%	47%	**50%**	40%	32%	36%
Horror movies	36%	37%	35%	**49%**	**49%**	38%	35%	24%	17%
Diverse language (not Eng./Fr.)	14%	14%	14%	11%	16%	17%	13%	14%	12%
Arthouse/independent movies	13%	14%	12%	10%	14%	14%	12%	15%	12%

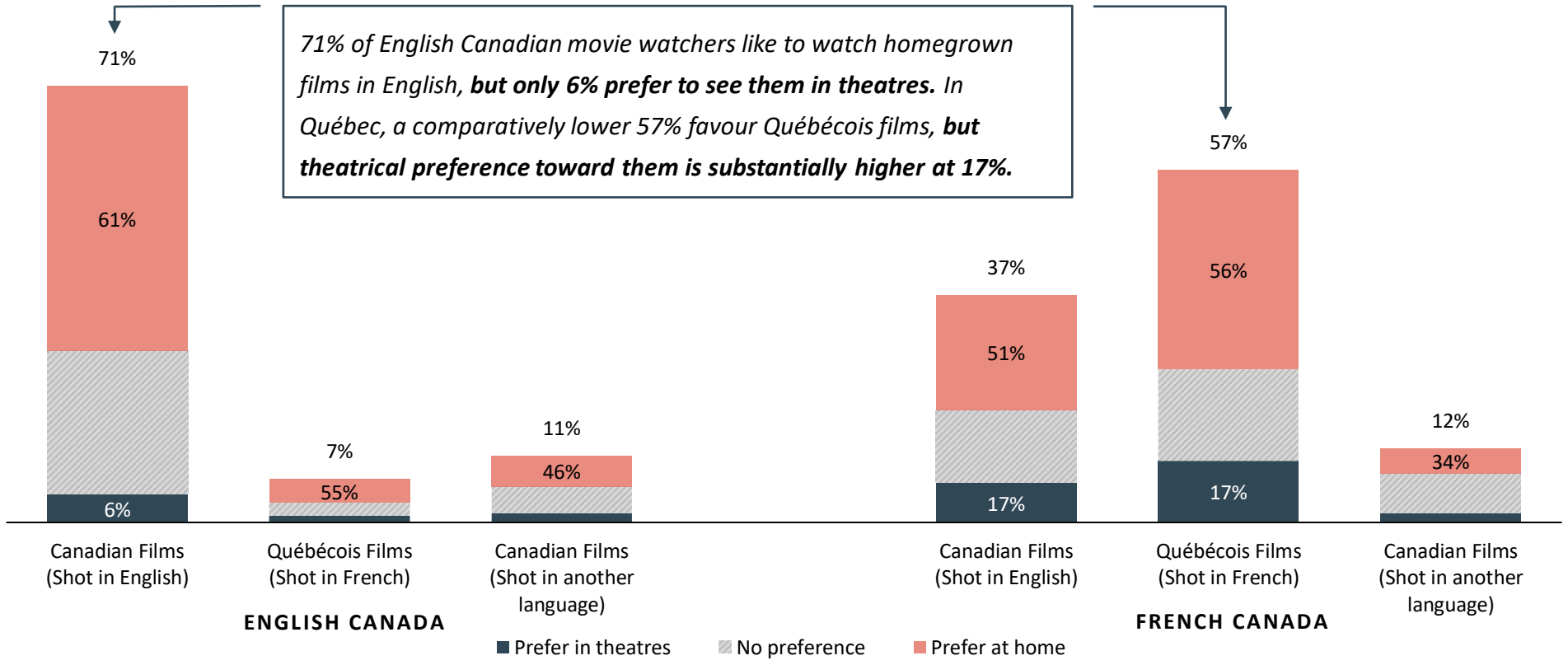
Q. Which of the following movie genres do you typically like to watch, either at home or in theatres?

Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.

Canadian Film Consumption

Theatrical vs. at-home viewing preferences by region

Québécois are more likely to prefer seeing Canadian/Québécois films in theatres, regardless of what language they are shot in.



Q. Thinking specifically about Canadian films, which of the following do you typically like to watch, either at home or in theatres?
Q. Where do you prefer to watch them?

Genre Quality

Perceived quality of movie genres in the past two years, on a scale of 1 (worst) to 10 (best)

Québécois rate the quality of many genres, particularly diverse language and Canadian movies, at higher levels than those outside of Québec. Additionally, women rate dramas, family fare and Canadian movies higher.

	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+	French Canada	English Canada
Canadian movies (Eng.)	6.2	6.0	**6.4**	6.1	6.1	6.1	6.2	6.3	**6.6**	6.4	6.2
Canadian movies (not Eng./Fr.)	5.2	5.0	**5.4**	5.3	5.5	5.4	5.2	4.8	5.1	**5.8**	5.0
Quebecois movies (Fr.)	5.0	4.7	**5.4**	**5.5**	5.2	5.0	5.0	4.7	4.9	**6.4**	4.6
Action movies	7.0	7.1	7.0	7.5	7.2	7.0	6.4	6.8	7.3	7.2	6.9
Documentary movies	6.8	6.8	6.7	7.1	6.3	6.8	6.7	6.9	6.9	**7.3**	6.6
Comedy movies	6.5	6.3	6.7	6.8	6.2	6.6	6.4	6.8	6.0	6.7	6.5
Drama movies	6.5	6.0	**7.0**	6.6	6.5	6.5	5.9	6.5	7.2	6.9	6.3
Family movies	6.2	5.8	**6.5**	5.2	6.6	6.3	6.3	6.3	6.6	6.3	6.2
Sci-fi movies	6.2	6.4	6.0	5.6	6.4	6.3	6.6	6.1	5.0	6.2	6.2
Arthouse/independent movies	5.6	5.6	5.6	6.0	5.0	6.2	5.8	5.4	5.4	5.8	5.5
Horror movies	5.3	5.2	5.3	6.1	**6.1**	4.9	**6.0**	4.3	4.2	5.7	5.2
Diverse language (not Eng./Fr.)	5.0	4.8	5.3	5.6	5.3	5.3	4.8	4.7	4.2	**5.9**	4.8

Q. On a scale of one to ten, how would you rate the quality of the types of movies released in the past two years?
Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.

Canadian Content in Theatres

While some specifically see Canadian content in theatres to support the local film industry, most reasons for watching these films on the big screen are identical to those for any other movie.

Reasons for Seeing Canadian Content in Theatres

THE THEATRICAL EXPERIENCE

At the highest levels, consumers who prefer seeing Canadian content in theatres (regardless of language) are drawn by the superior sound quality, screen size, and all-round immersive presentation, rather than the content itself.

"The larger format, enhanced sound, and the atmosphere make movie-watching an event." — Man, 62 (Ontario)

THE COMMUNAL THRILL & CONNECTION

For many, the shared theatrical experience fosters a sense of connection and excitement, as well as enhances the way they engage with the movie, which encourages them to see more movies in theatres, including Canadian ones.

"The theatre gives you the feeling that you are watching something with a shared community." — Man, 35 (Manitoba)

A WAY TO SUPPORT CANADIAN CINEMA

More secondarily and skewing to viewers of Québécois content, some choose theatrical viewing because they want to support their local cinema and the broader Canadian film industry, preserving local cultural diversity and creativity.

"I go to theatres for the vision of Québec filmmakers. I like to encourage them." — Woman, 27 (Québec)

A FUN OUTING

Others say that seeing films in the theatre is more than just watching a movie—it's an enjoyable social outing. Whether for date night or family gatherings, the theatre offers a venue for people to come together for a great time.

"At the theatres, we can have a fun family night out and eat freshly popped buttered popcorn." — Man, 67 (Ontario)

Canadian Content at Home

While most reasons for preferring to watch Canadian content at home mimic the reasons for watching any movie at home, some consumers share concerns that some Canadian movies do not always need a theatrical viewing.

Reasons for Seeing Canadian Content at Home

COMFORT AND CONVENIENCE

Many of those who prefer watching Canadian films at home prioritize personal comfort and the ability to curate an ambiance that aligns with their tastes, while also relishing the convenience of pausing and rewinding.

"I prefer to be more comfortable in my home. I can also stop and play the movie anytime." — Man, 55 (Ontario)

COST SAVINGS

At equally high levels and regardless of language, consumers prefer to see Canadian movies at home due to the significant cost advantage over the cinema, allowing them to avoid tickets, concessions, and transportation.

"I don't want to pay theatre costs to see a movie that could not be as good as I expected." — Woman, 27 (Alberta)

THE CALIBER OF CANADIAN FILMS

Others note that many Canadian films, regardless of language, lack the star power and budgets of major Hollywood releases and are better suited for home enjoyment.

"They are usually more low-key. They're not Hollywood blockbusters with big movie stars." — Woman, 51 (Ontario)

GREATER CONTENT AVAILABILITY

Access and flexibility make home viewing of Canadian films the preferred choice for some, thanks to platforms that offer an extensive movie library and the freedom to choose content, timing, and companions without constraints.

"I get more choices with my streaming services." — Man, 69 (Nova Scotia)

Influencing Consumer Choices

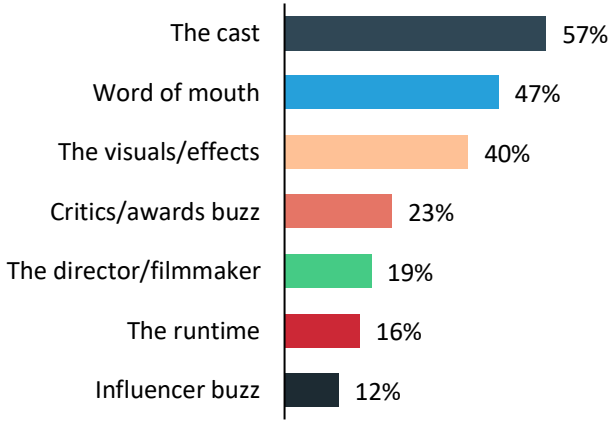
Sources of Information and Drivers of Attendance

Where to Learn about New Movies

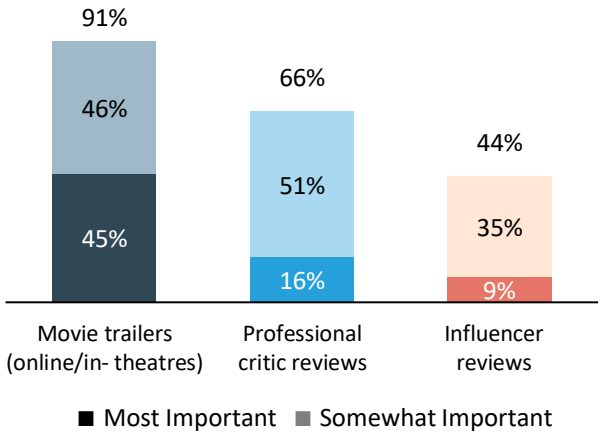
Movie trailers	53%
Online trailers	40%
In-theatre trailers	31%
Word of mouth	49%
YouTube	36%
TV commercials	36%
Facebook	24%
Critic reviews	19%

Key Drivers of Seeing a Movie Theatrically

(Aside from genre or story)

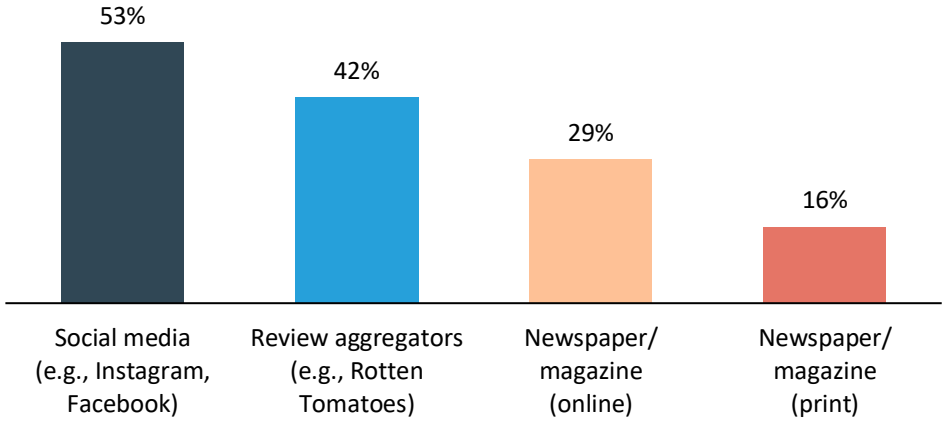


Importance of Trailers, Critics, Influencers

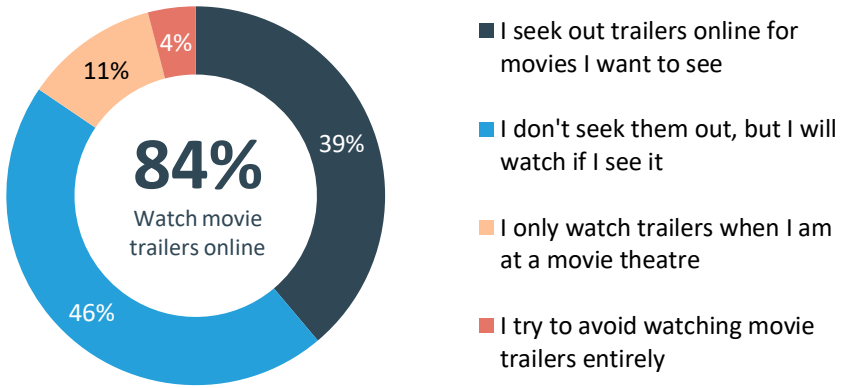


Sources of Critic Reviews

(Among the 66% who find professional critic reviews important)



Approach to Movie Trailers



Overall Sources of Information

Learning about new movies by gender and age segments

Following trailers and word of mouth, YouTube and TV commercials are top sources for learning about new movies. Facebook is the lead social media platform for learning about new films, and a fifth consult critic reviews.

	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+
Movie trailers	53%	53%	53%	55%	54%	52%	50%	56%	50%
Online	*40%*	*40%*	*39%*	*45%*	*39%*	*40%*	*38%*	*38%*	*40%*
In theatres	*31%*	*31%*	*32%*	*29%*	*34%*	*32%*	*30%*	*33%*	*28%*
Word of mouth from friends/family	49%	45%	**53%**	45%	41%	47%	47%	**56%**	**64%**
YouTube	36%	**45%**	28%	**46%**	42%	**44%**	36%	23%	22%
TV commercials	36%	36%	35%	23%	21%	31%	35%	**51%**	**60%**
Facebook	24%	23%	25%	26%	**30%**	**30%**	22%	17%	15%
Critic reviews	19%	19%	19%	16%	14%	17%	19%	20%	**29%**
Instagram	17%	14%	**20%**	**32%**	**29%**	**20%**	12%	4%	3%
TikTok	14%	11%	**16%**	**41%**	**19%**	11%	9%	5%	3%
IMDb	12%	**17%**	7%	10%	**17%**	14%	12%	9%	8%
Rotten Tomatoes	12%	**14%**	9%	9%	13%	15%	12%	11%	10%
X (Formerly 'Twitter')	7%	**11%**	3%	11%	9%	9%	7%	3%	1%
Reddit	7%	**10%**	4%	**9%**	**14%**	**10%**	3%	1%	2%
Influencers/tastemakers	6%	5%	**7%**	**18%**	7%	8%	3%	1%	-

Q. Where do you learn about new movies you might want to see?

Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.

Top Sources of Information

The highlighted section shows the variation in top five sources by segment

Trailers, word of mouth, YouTube, TV ads and Facebook are the top movie sources overall, yet social media outpaces TV ads for those under 35 with TikTok playing an important role for youngers. Critics Reviews outpace social media for those 55+.

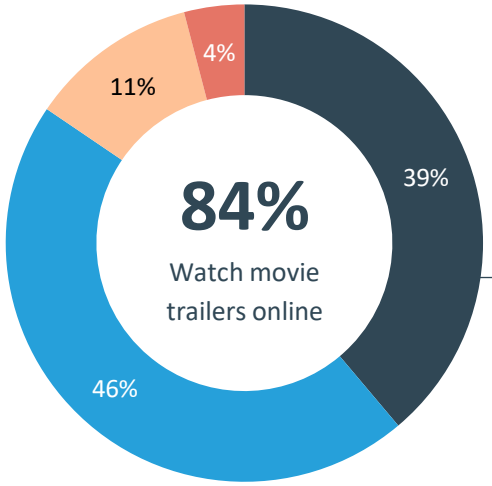
	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+
Movie trailers	53%	53%	53%	55%	54%	52%	50%	56%	50%
Word of mouth from friends/family	49%	45%	**53%**	45%	41%	47%	47%	**56%**	**64%**
YouTube	36%	**45%**	28%	**46%**	42%	**44%**	36%	23%	22%
TV commercials	36%	36%	35%	23%	21%	31%	35%	**51%**	**60%**
Facebook	24%	23%	25%	26%	**30%**	**30%**	22%	17%	15%
Critic reviews	19%	19%	19%	16%	14%	17%	19%	20%	**29%**
Instagram	17%	14%	**20%**	**32%**	**29%**	**20%**	12%	4%	3%
TikTok	14%	11%	**16%**	**41%**	**19%**	11%	9%	5%	3%
IMDb	12%	**17%**	7%	10%	**17%**	14%	12%	9%	8%
Rotten Tomatoes	12%	**14%**	9%	9%	13%	15%	12%	11%	10%
X (Formerly 'Twitter')	7%	**11%**	3%	11%	9%	9%	7%	3%	1%
Reddit	7%	**10%**	4%	**9%**	**14%**	**10%**	3%	1%	2%
Influencers/tastemakers	6%	5%	**7%**	**18%**	7%	8%	3%	1%	-

Q. Where do you learn about new movies you might want to see?

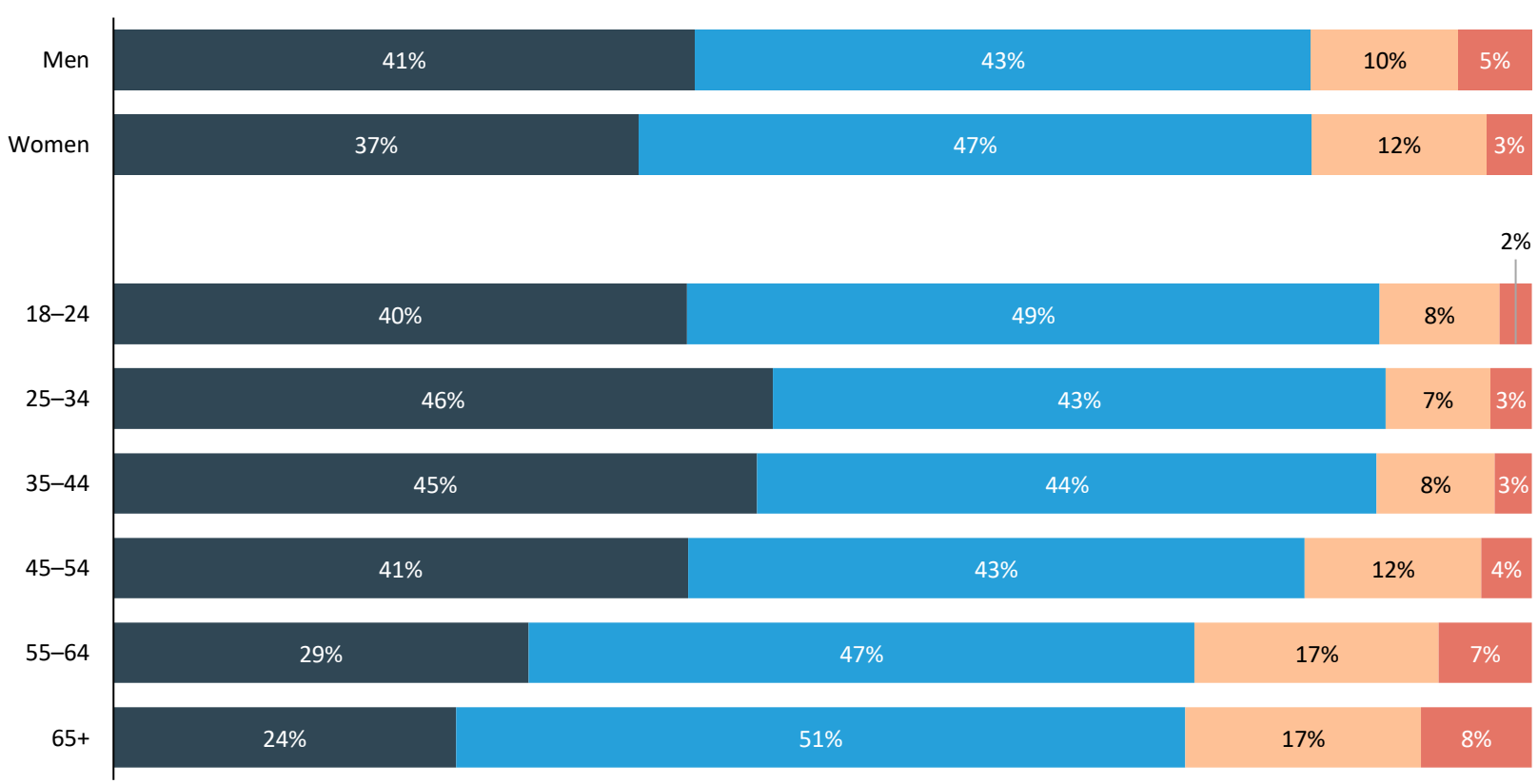
Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.

Most consumers watch movie trailers online, with four in ten actively seeking out trailers for movies they might want to see. Those aged 25–44 search for trailers more actively than others; those 55+ are most likely to watch trailers exclusively in theatres or avoid them entirely.

Movie Trailer Viewing Approach



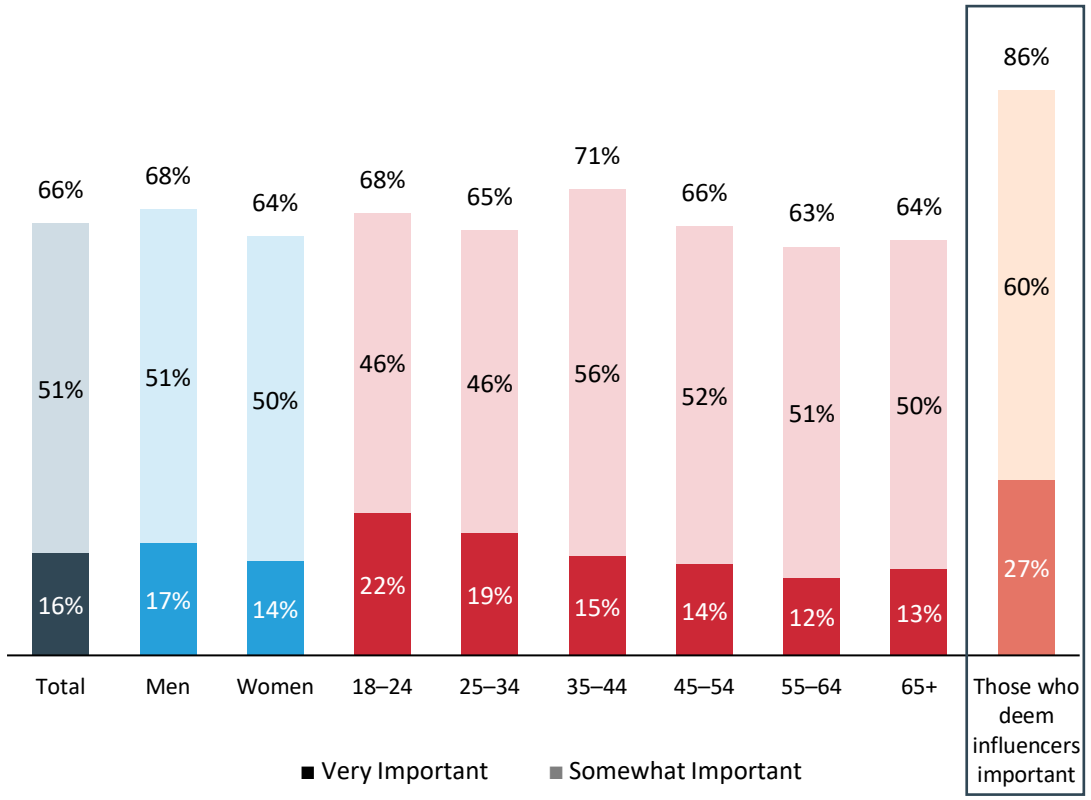
- I search for trailers online
- I don't search online, but will watch if I see it
- I only watch trailers at the movie theatre
- I avoid watching movie trailers entirely



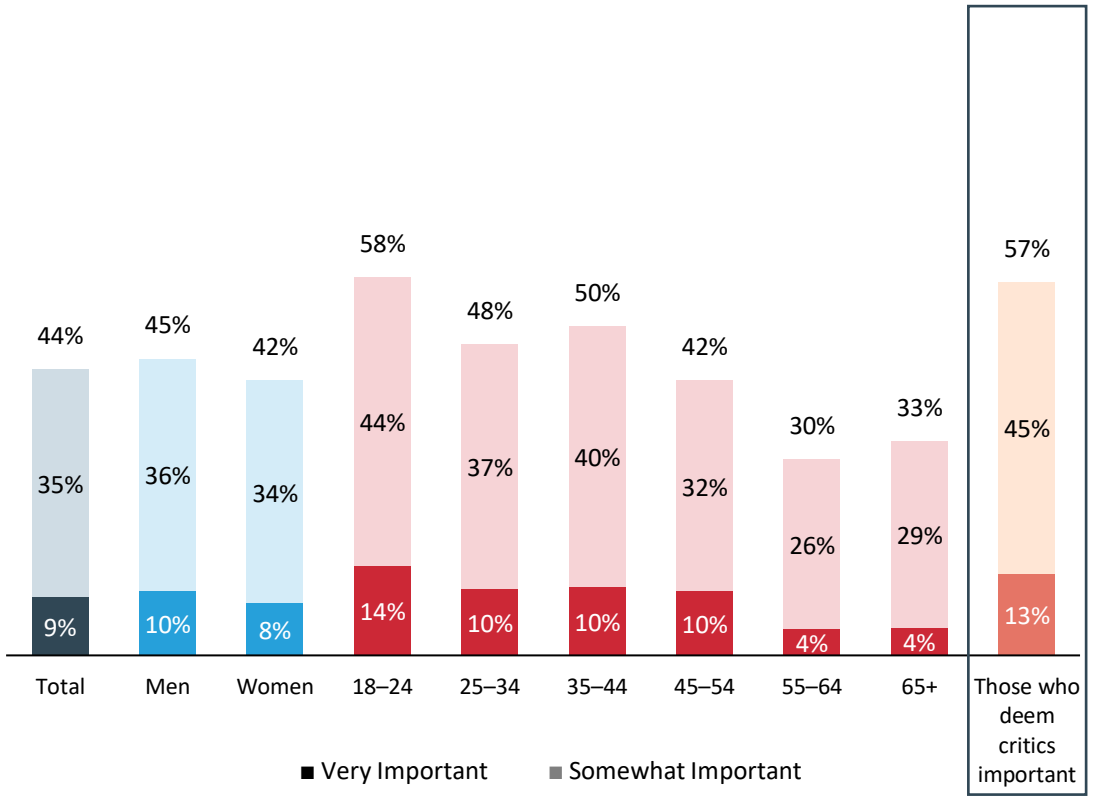
Q. Which of the following best describes your approach to watching movie trailers?

The importance of both critics reviews and influencers skews younger, yet critics reviews are considered to be more important. The smaller group of consumers who follow influencers also pay attention to critics, but the inverse trend is not as pronounced.

Importance of Reviews from Professional Critics

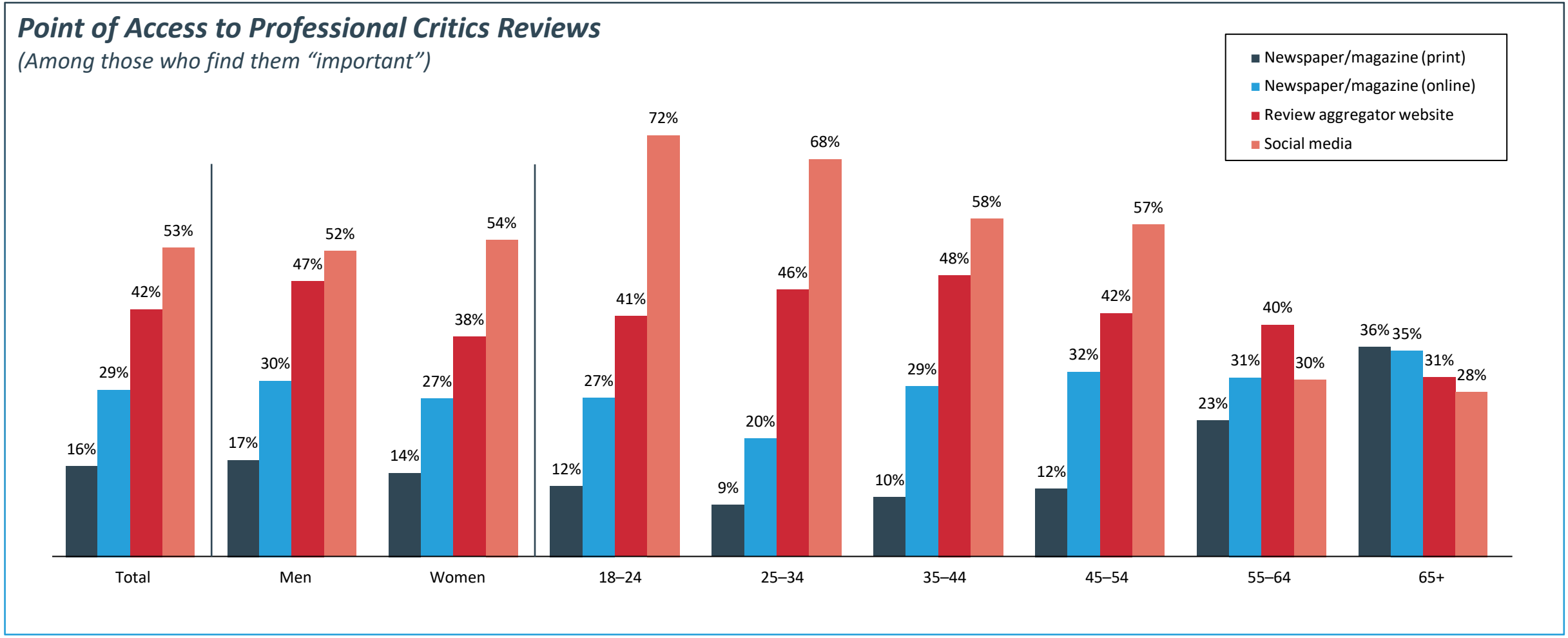


Importance of Reviews from Influencers/Tastemakers



Q. When thinking about your decision to see a new movie (either in theatres or at home), how important are each of the following?
Please think of a professional critic as a reviewer for a print/online publication. Please think of an influencer/tastemaker as someone with a social media following sharing their thoughts on a movie.

As a point of access for critics' reviews, social media tapers off with age, review aggregator sites peak among those aged 25–44, and newspapers/magazines skew to older consumers.



Q. In which of the following ways do you access professional critic reviews for new movies?

Important Factors

Influential elements when deciding to see movies in theatres by gender and age

Story and genre aside, the film's cast, word of mouth, and visual effects are the most persuasive factors when deciding to see a film theatrically.

	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+
Cast	57%	54%	**60%**	51%	55%	57%	60%	60%	60%
Word of mouth from friends and family	47%	42%	**52%**	43%	48%	47%	44%	47%	53%
Visuals/effects	40%	41%	39%	39%	37%	43%	40%	42%	39%
Positive buzz from critics/festivals/awards	23%	24%	23%	28%	21%	25%	22%	25%	22%
Director/filmmaker	19%	**23%**	15%	18%	20%	18%	23%	14%	19%
Runtime	16%	15%	18%	**24%**	17%	15%	15%	14%	14%
Positive buzz from social influencers	12%	11%	13%	**18%**	**18%**	13%	10%	5%	6%
IP/franchise	9%	**13%**	4%	11%	9%	12%	9%	4%	5%
Studio/distributor	5%	**7%**	3%	7%	**8%**	5%	4%	4%	2%

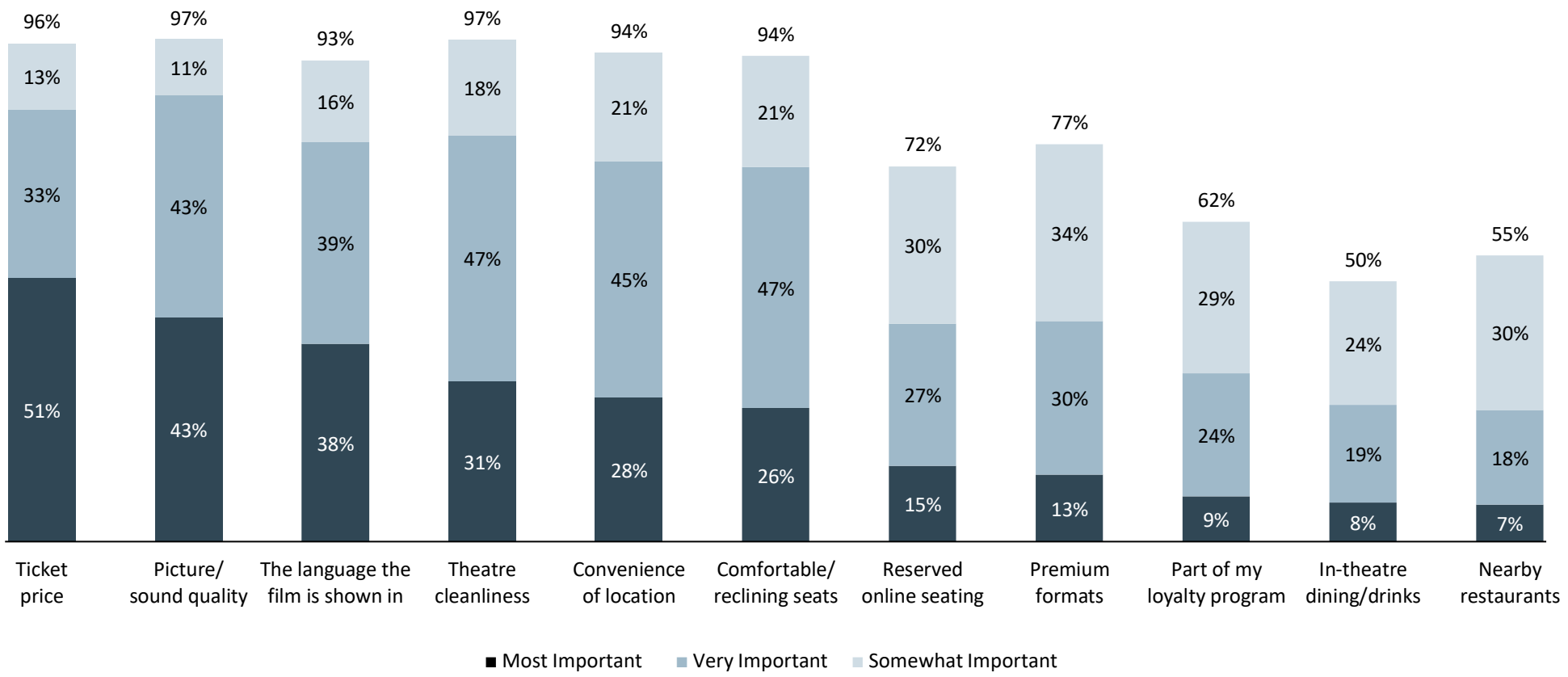
Q. Aside from the specific genre or story, what are the most important elements in deciding to see a movie in a theatre? (Please select up to three.)
Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.

Viewing Preferences

Important Factors

Choosing the ideal theatrical experience

Ticket price and picture/sound quality are top priorities when choosing a theatre, followed by presentation language.



Q. In choosing a theatre, how important are each of the following?

Important Factors

Choosing the ideal theatrical experience

Price is a more crucial factor for light moviegoers, while the importance of picture/sound quality is the top consideration for more avid moviegoers.

Those who said "Most Important"	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+	Light (1–3)	Mod (4–9)	Heavy (10+)
Ticket price	51%	50%	51%	47%	47%	48%	**57%**	54%	49%	**51%**	46%	39%
Picture/sound quality	43%	44%	43%	43%	43%	40%	44%	46%	46%	42%	47%	49%
Language of the film's presentation	38%	36%	40%	40%	36%	31%	38%	**46%**	39%	**40%**	34%	33%
Theatre cleanliness	31%	30%	32%	34%	27%	28%	29%	36%	35%	30%	28%	34%
Convenience of location	28%	26%	30%	26%	25%	29%	26%	31%	30%	26%	28%	32%
Comfortable/reclining seats	26%	24%	28%	26%	27%	26%	25%	26%	24%	25%	25%	32%
Ability to reserve seating online	15%	15%	15%	**26%**	14%	15%	14%	10%	9%	16%	16%	20%
Availability of premium formats	13%	14%	12%	16%	13%	13%	13%	10%	11%	12%	14%	17%
Inclusion in loyalty program	9%	10%	8%	11%	9%	8%	9%	7%	10%	7%	**12%**	**15%**
Dining/alcoholic beverages	8%	8%	7%	**12%**	**11%**	7%	6%	4%	6%	7%	**10%**	10%
Good restaurants located nearby	7%	8%	6%	12%	7%	8%	5%	5%	7%	6%	9%	11%

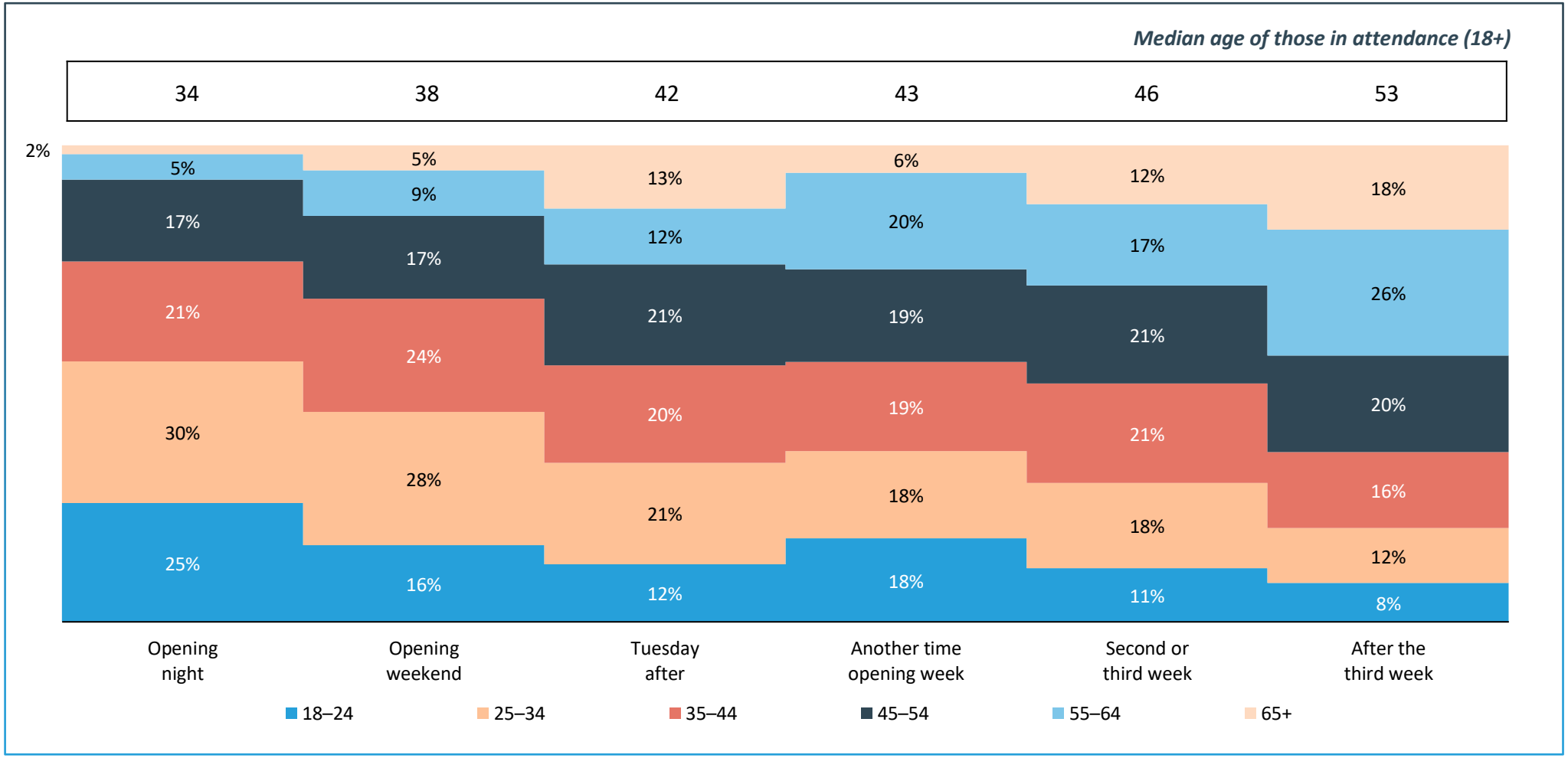
Q. In choosing a theatre, how important are each of the following?

Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.

Timeline of Theatrical Consumption

Preferred moviegoing period

More than half of opening night audiences are typically under 35, whereas after the third week, moviegoers 55+ are more heavily represented.



Q. Which of the following best describes when you generally see movies in a theatre?

Most streaming occurs using a TV. Around a fifth stream in 4K or UHD formats (more for men) or on a laptop (skewing to those under 35). Streaming via phone/tablet is less common, but peaks for those under 25.

	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+	Light (1–3)	Mod (4–9)	Heavy (10+)
Watch on a TV	81%	80%	81%	69%	77%	**84%**	79%	**86%**	**87%**	80%	78%	77%
Watch in 4K or UHD formats	22%	**28%**	17%	25%	26%	22%	27%	19%	13%	21%	**29%**	**29%**
Watch on a laptop	21%	22%	20%	**37%**	**29%**	20%	15%	14%	14%	20%	**24%**	**29%**
Use surround sound system	15%	**20%**	10%	6%	13%	15%	**21%**	17%	14%	12%	**18%**	**19%**
Watch on a phone	11%	10%	12%	**27%**	**16%**	**13%**	7%	4%	4%	11%	13%	14%
Watch on an iPad/tablet	10%	9%	12%	**17%**	9%	11%	9%	8%	8%	9%	12%	15%

Q. In which of the following ways do you watch movies at home?

Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments

iPad is a trademark of Apple Inc.

Streaming Services

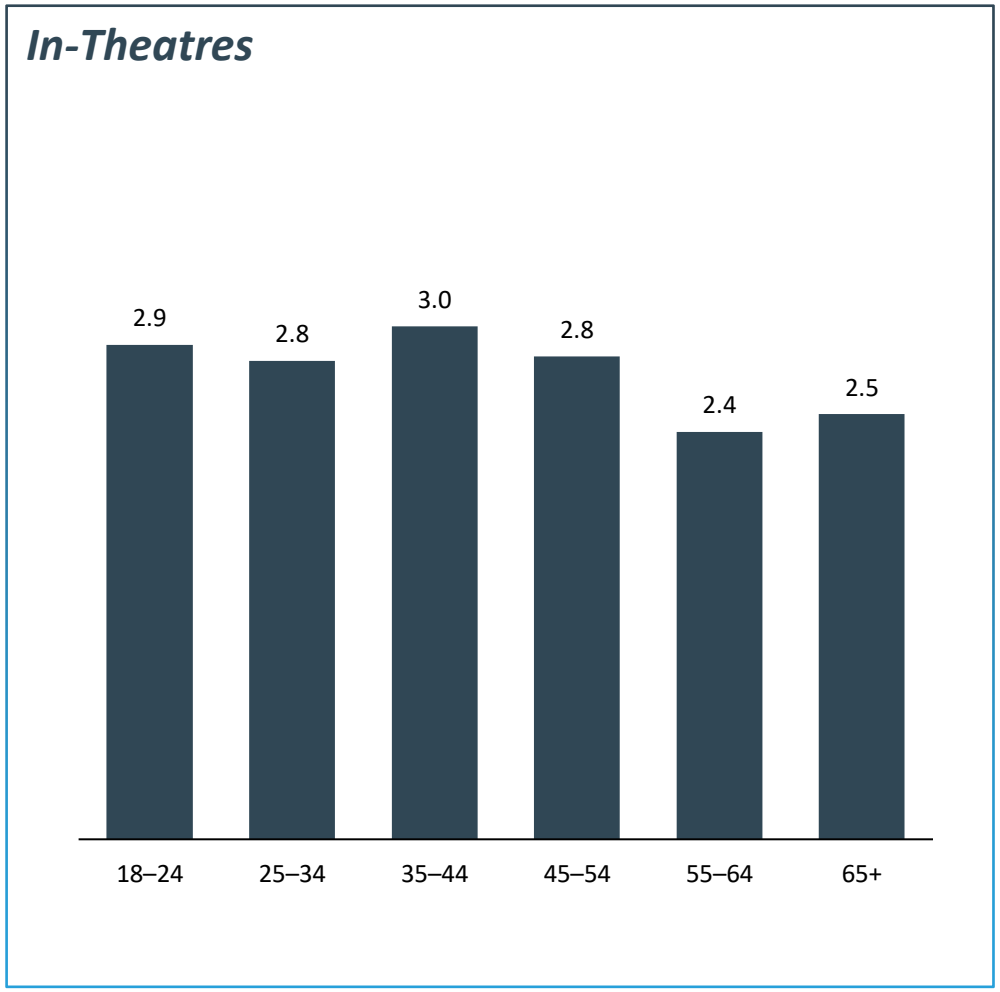
Netflix dominates the streaming market, followed by Amazon Prime and Disney+. Both Netflix and Disney+ skew to those 18–34. Women are more likely to be users of Noovo, ici.tou.tv, Club Illico, and Télé-Québec.

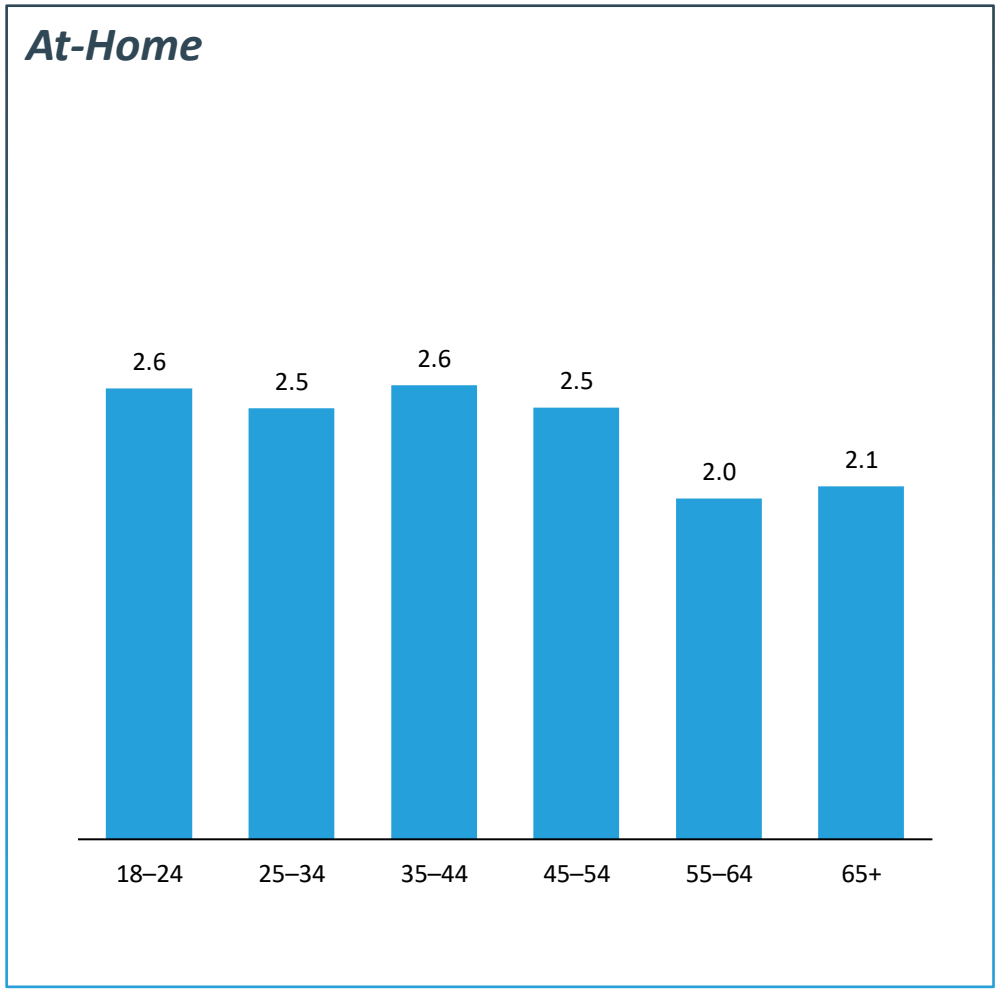
	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+	Light (1–3)	Mod (4–9)	Heavy (10+)
Netflix	67%	66%	68%	**83%**	**78%**	74%	63%	51%	47%	65%	**80%**	**82%**
Amazon Prime Video	50%	52%	49%	52%	53%	54%	54%	45%	41%	47%	**57%**	**61%**
Disney+	39%	38%	40%	**60%**	**53%**	46%	32%	22%	21%	37%	**51%**	**49%**
Crave	21%	22%	20%	21%	23%	19%	21%	18%	21%	19%	23%	**30%**
Apple TV+	12%	**13%**	10%	15%	16%	11%	13%	8%	6%	11%	**17%**	**18%**
Paramount+	11%	12%	10%	11%	13%	11%	11%	10%	6%	9%	**14%**	**17%**
CBC Gem	6%	7%	5%	4%	4%	5%	5%	**9%**	**10%**	4%	8%	7%
Noovo	5%	1%	**8%**	**10%**	**8%**	3%	3%	2%	4%	6%	3%	**10%**
Ici.tou.tv	4%	1%	**7%**	**9%**	5%	2%	4%	2%	3%	**7%**	2%	4%
Club Illico	3%	*	**5%**	5%	4%	3%	2%	1%	2%	4%	3%	4%
Télé-Québec	3%	1%	**4%**	4%	3%	4%	2%	1%	2%	3%	3%	5%
Shudder	2%	2%	2%	3%	3%	2%	2%	1%	-	2%	2%	3%

Q. Which of the following streaming services do you use to stream movies at home? (only those with 2% or more included above)
Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.
** indicates a value less than 0.5%*

Party Size: In-Theatres vs. At-Home

Theatrical moviegoing is a more social affair, with those at home slightly more likely to watch alone (skewing to those 55+).





Q. When seeing a movie in theatres, how many people do you typically attend with?
Q. When watching a movie at home, how many people do you typically watch with?

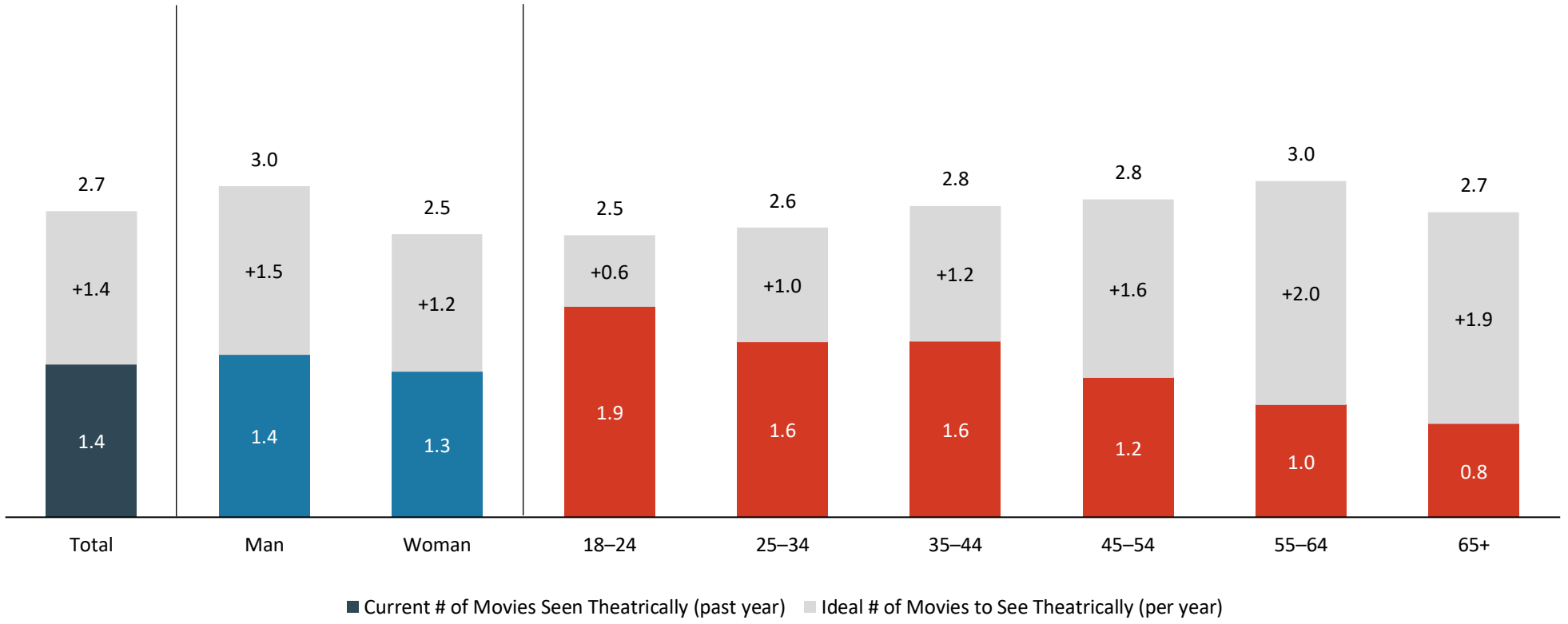
Barriers to Increased Consumption

Ideal Theatrical Consumption

Exploring how many movies consumers are seeing theatrically compared to how many they would like to be seeing

Ideally, moviegoers would attend twice as many movies theatrically as they did in the past year. Younger moviegoers are closer to reaching their ideal level of attendance.

Current & Ideal Level of Theatrical Consumption Per Year



Q. How many movies did you see in a theatre over the past twelve months?

Q. You said you saw [# OF MOVIES] in theatres over the past twelve months. What would be the ideal number of movies you would like to be seeing in theatres in a twelve-month period?

Cost is cited as the biggest barrier to more theatrical attendance, followed by content-related issues—either there are not enough movies of interest theatrically or there are too many movie options available at home.

	Total	Men	Women	18–24	25–34	35–44	45–54	55–64	65+	Light (1–3)	Mod (4–9)	Heavy (10+)
The cost	72%	69%	**73%**	66%	72%	70%	**77%**	74%	67%	**72%**	**70%**	52%
Not enough movies that I'm interested in seeing in a theatre	39%	40%	37%	44%	34%	36%	36%	43%	45%	41%	42%	34%
There are plenty of movies at home	36%	**40%**	32%	27%	28%	31%	35%	**47%**	53%	33%	31%	24%
Not enough time	33%	31%	**36%**	**49%**	**39%**	**39%**	29%	21%	21%	34%	40%	**47%**
I don't like the crowds	27%	27%	28%	24%	22%	25%	30%	32%	33%	25%	17%	16%
There aren't theatres near me	10%	10%	11%	9%	8%	10%	9%	14%	12%	8%	6%	5%
It's hard to all decide on the same movie	7%	7%	7%	11%	7%	7%	6%	6%	7%	8%	8%	8%

Q. Below are some reasons others have given as to why they aren't seeing movies in theatres as much as they'd like to. Which, if any, apply to you?
Bolded numbers indicate statistically significant differences at a 95% confidence level. For age breaks, bolding is significant compared to three or more other segments.

Barriers to More Frequent Moviegoing

RISING COSTS INHIBIT HIGHER MOVIEGOING

The cumulative cost of movie tickets and concessions is top of mind (especially for families and those attending in groups). This financial burden, exacerbated by the rising cost of living and inflation, has led many to opt for more affordable ways of consuming content—namely, streaming movies from the comfort of their homes.

CONTENT CONCERNS

Dissatisfaction with current movie offerings is also at play, with some citing a lack of variety, an overload of blockbusters, and the absence of intriguing and original "cinema-worthy" content as problematic. The rising cost of tickets and concessions intensifies the desire for high-quality, captivating films to justify the overall expense.

TIME CONSTRAINTS

Busy schedules, work commitments, family responsibilities, and the demands of daily life limit the availability of leisure time for some. Additionally, inconvenient showtimes and the perceived hassle associated with going to the theatre (e.g., traffic, parking, wait times, etc.) further contribute to theatrical barriers.

PERSONAL COMFORT

More secondary concerns were comfort-related, including cramped seating, temperature control, and the inability to pause or take breaks. Others were concerned with those who disrupt the experience with loud talking, phone usage, or inappropriate behavior. Sensitivity to being in enclosed areas raised some minor COVID-19 concerns.

What is Preventing Consumers From Watching More Movies at Home?

While high costs and limited theatrical offerings make at-home viewing options more appealing for some moviegoers, the at-home viewing landscape is not without downsides:

SUBSCRIPTION & VOD COSTS ADD UP QUICKLY

Costs associated with at-home viewing (including streaming/cable subscriptions and PVOD) are a big limiting factor—while some absorb the fees despite high prices, a subset curbs their spending, which in turn limits their access. Others question the overall value of streaming services, seeking out other low-cost alternatives instead.

QUALITY & VARIETY ARE INCONSISTENT AND HARD TO MINE

For many, the quality and variety of movies available at home is lacking. Some are exhausted by extensive catalogues, with few films that are ultimately of interest. Others feel the industry's focus on franchises, serialized content, and superhero hits makes it harder to find traditional storytelling that aligns with their preferences.

"The subscription costs for streaming services are too high. I don't want to spend extra money to watch one movie. Plus, the quality of new releases is poor. I haven't seen many that have caught my attention."

– Man, 49 (British Columbia)

OTHER FORMS OF ENTERTAINMENT WIN OUT

The influx of easily accessible alternative options (like TV, sporting events, etc.) leaves some with limited time to watch movies. Some prefer TV shows, due to their shorter episodes and ongoing storylines. The high quality of TV dramas, sitcoms, and sports broadcasts all present highly attractive alternatives.

HOLDING OUT FOR THE IMMERSIVE THEATRICAL EXPERIENCE

At lower levels, **some reserve their viewing for the grandeur of a cinema, where a big screen and immersive sound provide a more captivating experience** than what they have at home. Household disruptions further drive some viewers to favour a more immersive and unencumbered cinematic experience.

REAL LIFE GETS IN THE WAY

Logistical constraints, driven by busy work schedules, family responsibilities, and the demands of daily life also prevent people from watching more movies at home. Additionally, some parents—especially those with young children— try to prioritize screen-free time with their kids.

"TV has increased greatly in quality. We find it easier to find a really high-quality TV show than a movie. We always have at least one or two TV shows we're streaming so that's an easy go-to if we don't have two hours for viewing. We also love to watch sports in our household so during NHL, NBA, and Diamond League Track and Field seasons we don't watch as many movies."

– Woman, 51 (Ontario)

Segmenting Movie Watchers

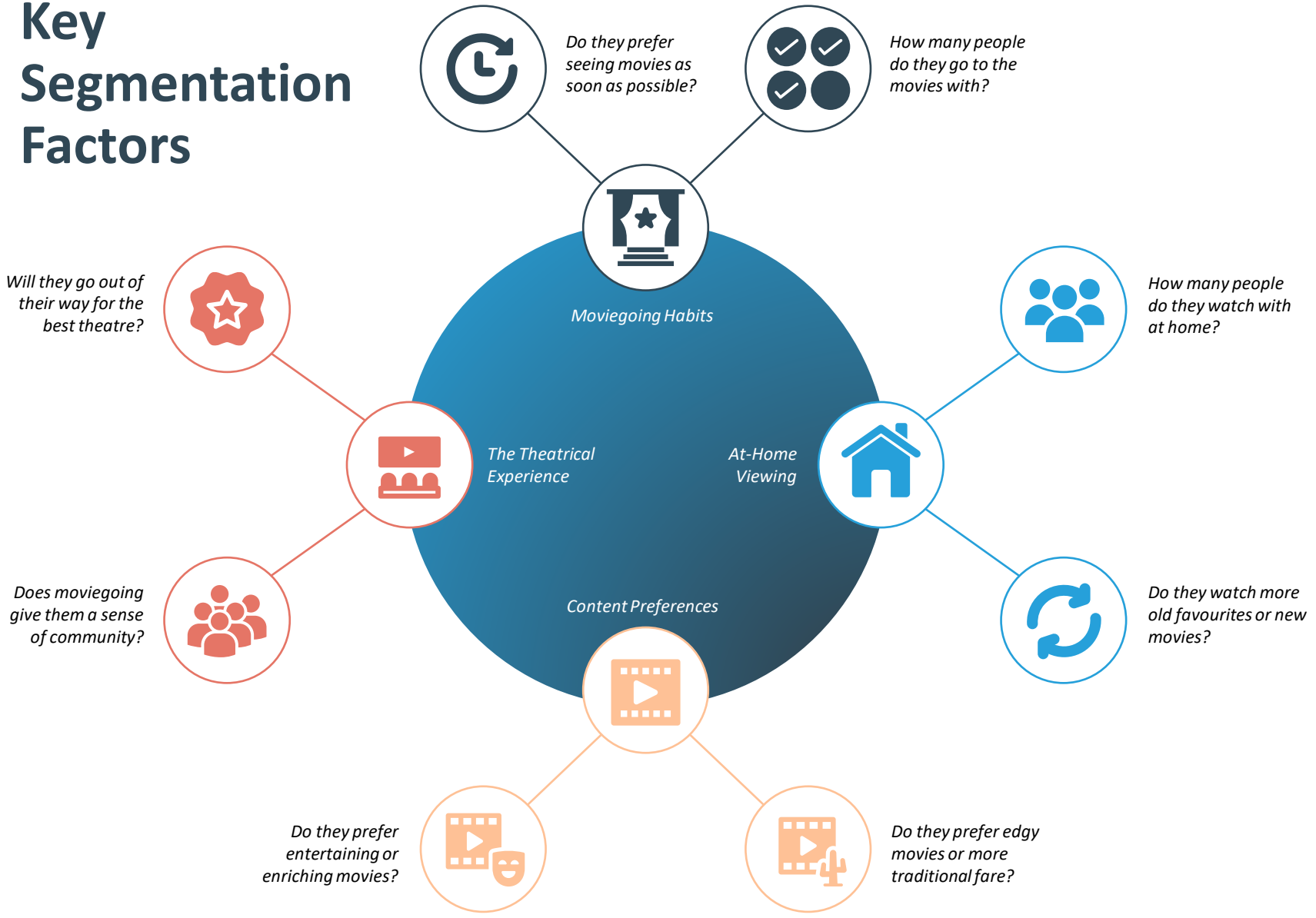
To segment the universe of Canadian movie consumers, ERm first identified all factors that were potentially relevant to one's approach to feature films, then iteratively employed both factor analysis and k-means clustering to identify the key segmentation questions.

Along the process of iterating through segmentation solutions, these factors emerged as the most significant differentiators between consumers.

Though the segments do differ somewhat demographically and in terms of the avidity of their movie consumption, demographic metrics were not included in the segmentation model.

Ultimately, four segments of movie consumers were identified, differentiated on the key metrics enumerated to the right, among others.

Key Segmentation Factors



The Four Segments of Canadian Movie Consumers

INSIDERS

THRILLS & FRILLS

INTELLECTS

ONE-TIMERS

Each segment description and likeness are drawn using some of their most common attributes.

Introducing the Four Segments of Canadian Movie Consumers

INSIDERS

Boasting the strongest affinity for movies and translating their passion into avid theatrical attendance, these young, urban, diverse and male-skewing movie fans are the cornerstone of the industry in many ways. Enjoying a broad range of fare encompassing mainstream and arthouse movies (including Canadian content), these adventurous moviegoers derive a sense of community from watching movies, sharing the experience with others, and discussing what they've seen in depth. Although theatres are a draw to be part of conversations from the get-go, these moviegoers do supplement their moviegoing with at-home viewership, both to watch classic cinema and revisit familiar favourites.

THRILLS & FRILLS

This experience-forward set of highly social moviegoers has the strongest preference for theatrical viewing of all the segments. A male-skewing set with favoured genres, including action, sci-fi, and horror, the spectacle of watching exciting and entertaining films with a full audience (including their friends) is well worth leaving the house and seeking out the best presentation quality. Often attending early in the they, they also enjoy recommending movies to others and being part of the conversation. With decidedly mainstream tastes, critics take more of a backseat to factors like trailers, cast, and the promise of impressive visuals. They enjoy a mix of old and new fare at home.

INTELLECTS

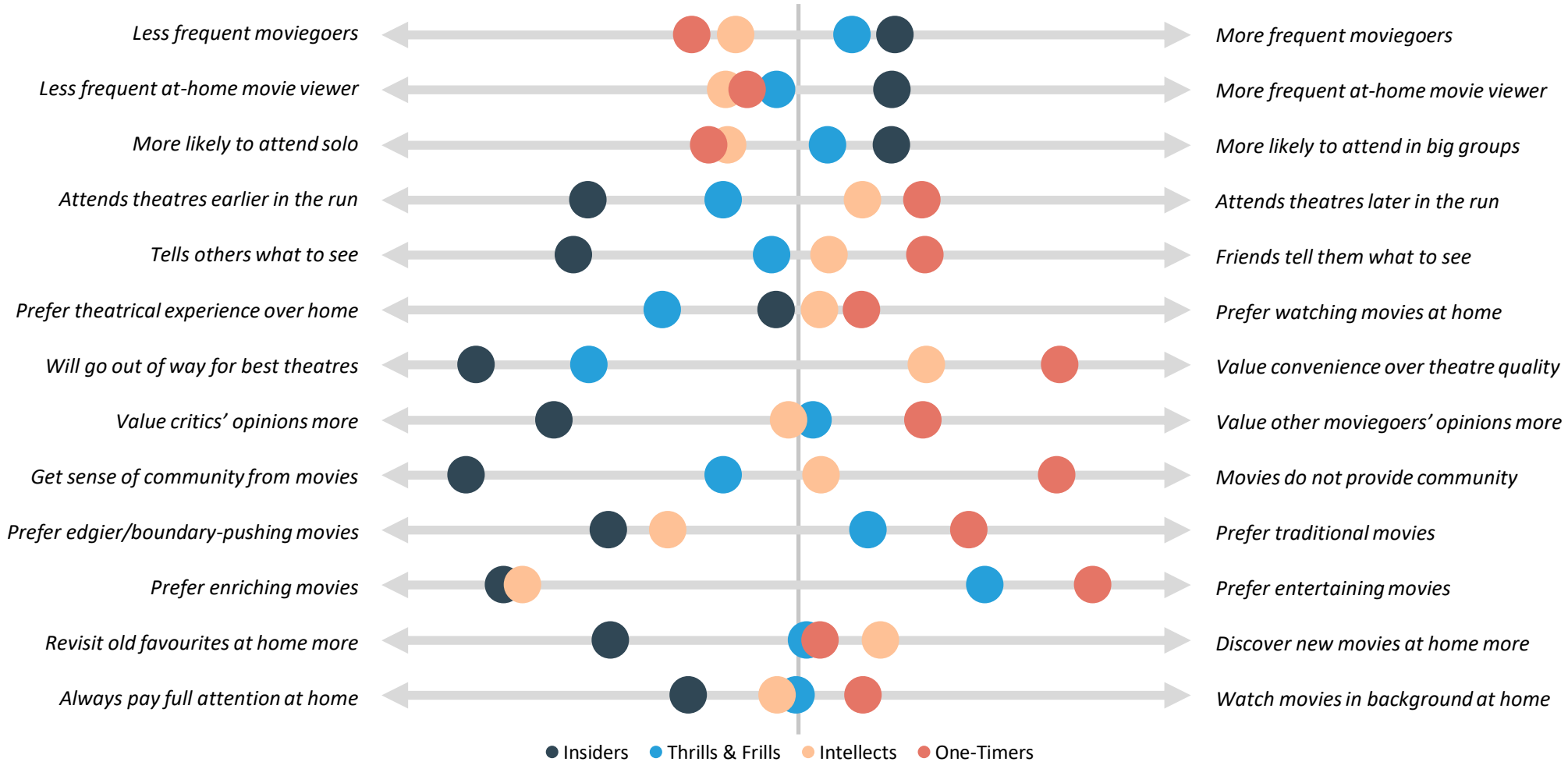
This segment of lower spectacle, enrichment-focused moviegoers do the bulk of their movie consumption at home. Without a strong connection to the theatrical experience or content preferences that warrant anything fancy on the presentation front, these moviegoers have no issue waiting until a film has racked up some awards nominations or great word of mouth before committing to seeing it. Enjoying documentaries, foreign films, arthouse films, and dramas, these highly educated, slightly older and female moviegoers are much more open to content that pushes boundaries with fresh perspectives. They use at-home viewing to catch up films that they may have missed in theatres.

ONE-TIMERS

Although they are the least film-loving segment, these older and less diverse movie watchers still make time for movies as more passive viewing at home. They have the most mainstream set of preferences, strongly preferring content that strictly adheres to traditional formulas and prioritizes entertainment over deeper commentary. As they are less plugged into the movie world, reaching them through word of mouth or TV commercials tends to make a bigger impact than expecting that they'll seek out trailers or reviews on their own volition. They are open to watching more movies, but as the most rural segment, access to movie theaters is a heightened barrier.

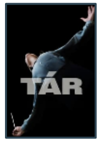
Core Segmentation Dimensions

The segments vary widely in terms of many of their movie preferences and habits for in-theatre and at-home viewing, though other factors like their avidity of consumption have less drastic differences. The chart below depicts the segments' relative likelihood of engaging in certain behaviors or having certain preferences, with dots representing z-scores to normalize distribution. For example, Intellects and One-Timers comprise less frequent moviegoers, while others are slightly more avid.



Movie Audience Composition by Segment

The table below illustrates the composition of the audience for a selection of recent movies. Overall, Insiders—who are 22% of all movie consumers—make up 33% of all tickets sold theatrically, illustrating that they generally pull above their weight for moviegoing. This was particularly true for the likes of *Noémie Dit Oui*, *The Worst Person in the World,* and *Infinity Pool*—films where at least two in five attendees were this segment. *TÁR* drew an outsized portion of Intellects, who account for 21% of the overall box office but 34% of the gross for this particular film, reflecting their appreciation for award-caliber, challenging dramas.

	% of overall marketplace	% of tickets sold theatrically	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees	 Attendees
Insiders	22%	33%	39%	29%	39%	34%	**59%**	38%	25%	**65%**	**46%**	38%	32%	26%
Thrills & Frills	23%	29%	6%	29%	**40%**	27%	16%	21%	28%	11%	**30%**	24%	23%	29%
Intellects	26%	21%	**34%**	23%	17%	18%	20%	**28%**	21%	16%	19%	**26%**	23%	23%
One-Timers	29%	18%	21%	20%	4%	21%	5%	14%	**25%**	8%	5%	12%	**22%**	**22%**
			TÁR	*Oppenheimer*	*BlackBerry*	*23 Décembre*	*Noémie Dit Oui*	*The Fabelmans*	*Top Gun: Maverick*	*The Worst Person in the World*	*Infinity Pool*	*Everything Everywhere All At Once*	*A Man Called Otto*	*The Super Mario Bros. Movie*

Please note, percentages may not total 100% due to rounding.

Key Segmentation Demographics

	Insiders	Thrills & Frills	Intellects	One-Timers
Men	53%	52%	46%	43%
Women	47%	47%	54%	57%
Median Age (18+)	38	43	45	49
White	65%	71%	74%	80%
Asian	25%	22%	21%	16%
Black	8%	4%	4%	3%
Indigenous	7%	6%	3%	5%
College Educated+	47%	47%	49%	40%
Parent of child <18	40%	32%	25%	25%
Identify as 2SLGBTQIA+	10%	8%	14%	8%
Québécois	21%	19%	25%	26%
Urban	59%	51%	50%	46%
Suburban	28%	39%	39%	36%
Rural	13%	10%	11%	18%

Please note that all race/ethnicity categories are inclusive of mixed-race people.

Key Segmentation Behaviour & Preferences

	Insiders	Thrills & Frills	Intellects	One-Timers
Seen a movie in theatres in past 12 months	90%	84%	75%	65%
Mean # of movies seen theatrically per year (including non-moviegoers)	2.0	1.8	1.1	0.8
Mean # of movies seen at-home per week	1.8	1.3	1.2	1.2
Proportion of arthouse films watched per year (theatre or home)	46%	25%	32%	21%
Consider film critics/festivals/awards to be very influential	23%	21%	31%	19%
Consider filmmakers to be very influential	24%	18%	23%	12%
Consider recommendations from friends/family to be very influential	40%	43%	50%	52%
Typically watch Canadian films (shot in English)	73%	64%	66%	51%
Typically watch Québécois films (shot in French)	20%	16%	23%	15%
Typically watch Canadian films (shot in another language)	18%	10%	13%	5%
Do not watch Canadian/Québécois films	17%	29%	22%	39%
Prefer movies that feature diverse stories[1]	64%	30%	52%	27%
Prefer movies that are edgy/boundary pushing[1]	61%	26%	53%	21%

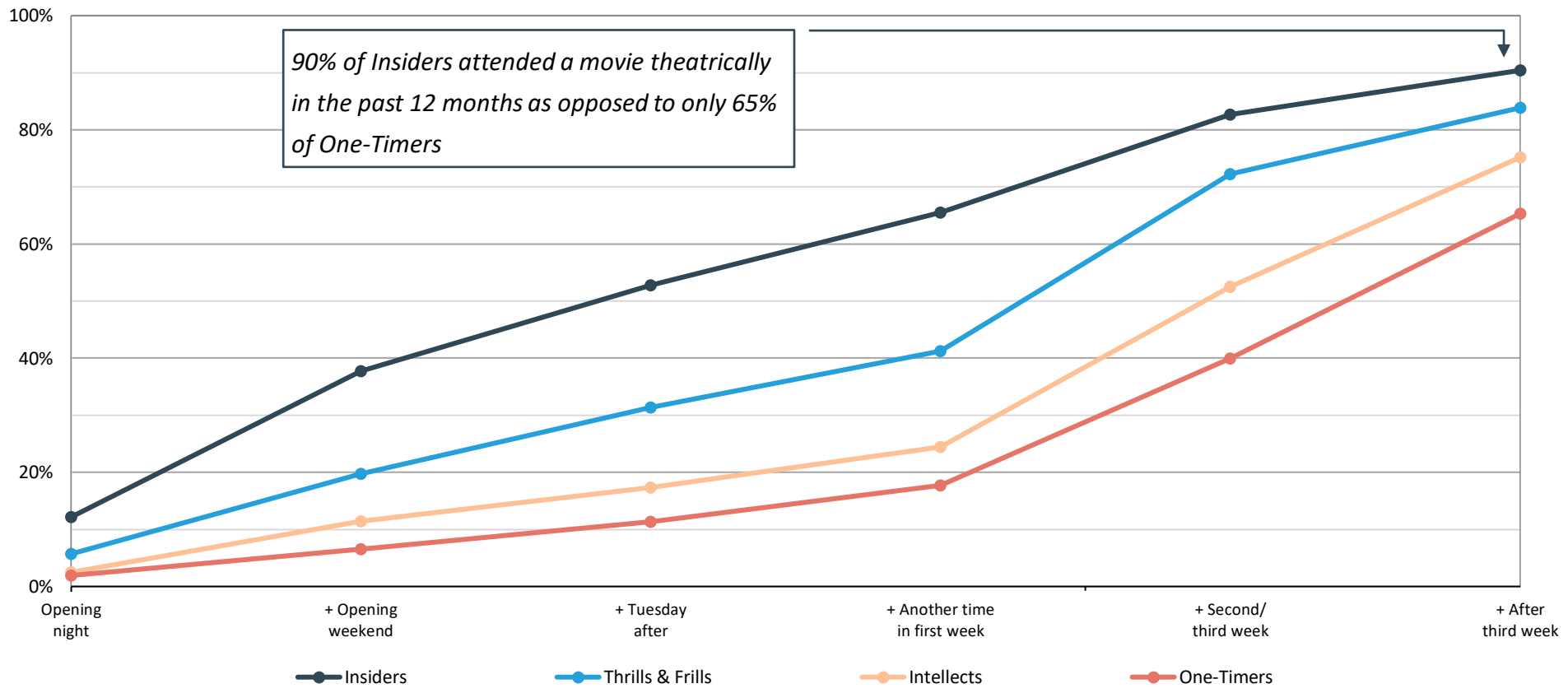
1. Strongly/somewhat agree with statement

Timeline of Theatrical Consumption

When each segment of movie consumers generally sees movies in theatres

Most Insiders have attended a movie they're interested in seeing by the Tuesday after opening weekend, whereas fewer than 25% of Intellects and One-Timers attend before the second week.

Timeline of Theatrical Consumption by Segment



Q. Which of the following best describes when you generally see movies in a theatre? (Includes non-moviegoers)

A Closer Look at Each Segment

Insiders

22% Insiders make up 33% of theatrical ticket sales

The youngest (median age of 38), **most male, and most diverse** set of movie watchers, this set is more likely to live in urban areas

The biggest movie fans, they are the earliest attendees at the theatre. They outpace others for at-home and in-theatre film viewing

Going to **a mean of 2.0 movies/year**, these more avid consumers are the **most aware of filmmakers and studios**

Just under half the movies they see are arthouse films, reflecting **an appetite for edgier fare/less traditional content**

They are **more likely to enjoy horror movies and home-grown Canadian content** than other movie watcher segments

Awards, festivals, critics reviews and influencers clue them in on what to see; they then spread WOM to others

They over-index on social media as an information source on new films and are likely to actively seek out trailers

They like seeing movies in theatres and at home, **over-indexing as owners of quality in-home presentation tech**

Big movie lovers, **they are more likely to watch classic movies at home**; 85% prefer to mostly watch old favourites

Insiders are considerably more likely to use YouTube, TikTok, Instagram, Reddit, and other social media to discover new movies.

Media Platform	Insiders Sources	Total Movie Consumer Sources	Index[1]
YouTube	50%	36%	138
Movie trailers (online)	37%	40%	92
Movie trailers (in theatres)	35%	31%	111
Word of mouth from friends/family	34%	49%	70
Facebook	31%	24%	130
TV commercials	26%	36%	75
Instagram	24%	17%	142
TikTok	21%	14%	147
Rotten Tomatoes	15%	12%	124
Critic reviews	15%	19%	80
IMDb	14%	12%	118
Reddit	11%	7%	154
X (Formerly 'Twitter')	9%	7%	132
Influencers/tastemakers	9%	6%	143
Threads	4%	2%	208
Letterboxd	2%	1%	204

Q. Where do you learn about new movies you might want to see?

1. The interest index compares the sources Insiders uses to learn about new movies they want to see against overall movie consumers. Any number higher than 100 indicates a source that Insiders use to learn about new movies more than others; a number less than 100 indicates a source they use less than others.

Thrills & Frills

23% Thrills & Frills make up 29% of theatrical ticket sales

A slightly male skewing set, **this is the second youngest group, with a median age of 43.** Their racial makeup mirrors the overall country

59% report "loving" movies and they prefer watching movies theatrically; **they attended a mean of 1.8 in the past year**

As theatre lovers, they will **seek out cinemas that offer the best presentation** over the most convenient option

They over-index as fans of action, sci-fi, and horror movies, seeking out pure entertainment over high art

They enjoy being part of an event movie and they tend to be on the earlier end of theatrical attendance

They are more inclined to watch movies with groups of friends and family, and enjoy discussing what they've seen

They are **reliant on trailers, both in theatres and online**, as a source of information to learn about new movies

At home, they mostly watch recent releases, taking the same social approach as they do when going to the movies

With a third being parents of children, **they over-index as Disney+ subscribers and** prefer to see family movies at home

Thrills & Frills are more reliant on trailers to learn about new movies.

Media Platform	Thrills & Frills Sources	Total Movie Consumer Sources	Index[1]
Word of mouth from friends/family	45%	49%	91
Movie trailers (online)	43%	40%	107
YouTube	41%	36%	111
TV commercials	36%	36%	101
Movie trailers (in theatres)	36%	31%	113
Facebook	27%	24%	112
Instagram	18%	17%	106
Critic reviews	18%	19%	96
IMDb	13%	12%	106
TikTok	12%	14%	89
Rotten Tomatoes	11%	12%	92
Influencers/tastemakers	7%	6%	112
Twitter (now 'X')	7%	7%	97
Reddit	7%	7%	98
Threads	2%	2%	102
Letterboxd	1%	1%	83

Q. Where do you learn about new movies you might want to see?

1. The interest index compares the sources Thrills & Frills uses to learn about new movies they want to see against overall movie consumers. Any number higher than 100 indicates a source that Thrills & Frills use to learn about new movies more than others; a number less than 100 indicates a source they use less than others.

Intellects

26% Intellects make up 21% of theatrical ticket sales

With a median age of 45, **this set skews older and slightly to women**. They have the highest levels of education

Half report "loving" movies and while they still see a mean of only 1.1 films theatrically/year, **they see many more at home**

They don't prioritize the big screen experience, **preferring the cost, convenience, and comfort of watching at home**

They lean into boundary-pushing, higher-brow fare, **enjoying arthouse, documentaries, and dramas more than most**

When they go to the movies it's often late in the run. They sometimes come with a partner, but are **not afraid to go alone**

They enjoy discussing and reading about the movies they've seen, **often seeking out reviews to learn more**

They value festivals, awards, and critics, but WOM from a trusted source matters even more to this segment

Their at-home viewing options include lots of recent titles they missed in theatres, making their theatrical urgency low

The largest 2SLGBTQIA+ segment (14%), they are more likely than others to **value stories that feature diverse perspectives**

Intellects are considerably more likely to rely on word of mouth and critical buzz to learn about new movies.

Media Platform	Intellects Sources	Total Movie Consumer Sources	Index[1]
Word of mouth from friends/family	60%	49%	122
Movie trailers (online)	42%	40%	105
TV commercials	37%	36%	104
YouTube	33%	36%	90
Movie trailers (in theatres)	28%	31%	89
Critic reviews	27%	19%	143
Facebook	21%	24%	88
Instagram	18%	17%	103
TikTok	16%	14%	116
Rotten Tomatoes	14%	12%	116
IMDb	13%	12%	104
X (Formerly 'Twitter')	8%	7%	113
Reddit	8%	7%	112
Influencers/tastemakers	7%	6%	108
Threads	2%	2%	99
Letterboxd	1%	1%	119

Q. Where do you learn about new movies you might want to see?

1. The interest index compares the sources Intellects uses to learn about new movies they want to see against overall movie consumers. Any number higher than 100 indicates a source that Intellects use to learn about new movies more than others; a number less than 100 indicates a source they use less than others.

One-Timers

29% One-Timers make up 18% of theatrical ticket sales

The oldest, least diverse, and most female skewing segment, they have the lowest level of formal education

Their love for movies is lower than others, as is their annual moviegoing (a mean of 0.8); movies are less of a priority

Less likely to value the theatrical experience, **they prefer the cost saving and convenience of watching at home**

They have the most mainstream tastes and prefer entertaining movies that follow more traditional formulas

When they do make it to theatres, **they attend late in the run**—nearly 40% attend after the third week

They don't achieve a sense of community with seeing feature films, and **typically don't watch or discuss with others**

TV ads and word of mouth are critical factors driving awareness for new films; they are the least likely to seek out trailers

At-home viewing is more passive, involving playing movies as background entertainment more than others

They are open to watching more movies, **but as the most rural-segment, access is a heightened barrier**

One-Timers are more reliant on word of mouth and TV commercials, suggesting passive consumption of new information about movies.

Media Platform	One-Timers Sources	Total Movie Consumer Sources	Index[1]
Word of mouth from friends/family	55%	49%	111
TV commercials	41%	36%	115
Movie trailers (online)	38%	40%	95
Movie trailers (in theatres)	29%	31%	91
YouTube	26%	36%	70
Facebook	19%	24%	78
Critic reviews	15%	19%	80
Instagram	10%	17%	59
IMDb	9%	12%	77
Rotten Tomatoes	9%	12%	72
TikTok	8%	14%	57
X (Formerly 'Twitter')	5%	7%	66
Reddit	3%	7%	48
Influencers/tastemakers	3%	6%	49

Q. Where do you learn about new movies you might want to see?

1. The interest index compares the sources One-Timers uses to learn about new movies they want to see against overall movie consumers. Any number higher than 100 indicates a source that One-Timers use to learn about new movies more than others; a number less than 100 indicates a source they use less than others.

Segment Opportunities

INSIDERS

These moviegoers revel in being the first to know about new releases and will always take an opportunity to sound off with their opinions. Still, for this adventurous set of feature film watchers—**who love digging through the archives just as much as watching a new release**—getting them out of the house will depend on content that is not just theatre-worthy, but part of a broader conversation.

These moviegoers are the most in-tune with Canadian releases, so **count on them to be the biggest champions, using them to kickstart word of mouth about upcoming releases on social media.**

THRILLS & FRILLS

These event moviegoers are the biggest advocates for seeing films in theatres and want to have a true experience when they go to the cinema. Top notch presentation matters to them, as do movies that lend themselves to impressive visual and audio quality.

These less adventurous moviegoers prioritize entertainment over enrichment, and content that emphasizes fun stories is proven to resonate with this segment.

Influencers in their own right, they can also be counted on to spread word of mouth but will recommend a narrower set of films than Insiders.

INTELLECTS

Avid consumers of enriching content, shifting their viewership from at home to in theatres likely depends on a few factors—word of mouth and trailers are important, but a positive critical consensus is also paramount to catching their eye. Urgency is another crucial factor, as these movie watchers are more content to sift through their streaming queue than to make the trek to theatres. **Although they don't respond as strongly to concepts like PLF, cinema can still hold value as a place to give compelling stories their undivided attention.** They do have an appetite to attend more films theatrically but need the extra push to do so.

ONE-TIMERS

As a more passive set of feature film watchers, getting movies on their radar is only likely to happen for mainstream titles with aggressive marketing campaigns.

There are few opportunities to fundamentally shift their approach to movies, as they don't have the same love for them as the other segments, nor do some of them live within close proximity to theatres.

As primarily at-home consumers who are unlikely to start going to theatres with great regularity, **they are stronger targets for PVOD releases of mainstream fare.**

Moviegoing & Media Habits by Segment

Genre Interest

	Insiders	Thrills & Frills	Intellects	One-Timers
Canadian films (Eng.)	73%	64%	66%	51%
Québécois films (Fr.)	20%	16%	23%	15%
Canadian films (not Eng./Fr.)	18%	10%	13%	5%
Comedy	74%	75%	72%	75%
Action	69%	78%	68%	72%
Drama	60%	59%	70%	59%
Sci-Fi	47%	49%	47%	43%
Documentary	43%	42%	55%	40%
Family	43%	45%	40%	40%
Horror	42%	40%	36%	28%
Diverse language (i.e., not English or French)	15%	11%	20%	10%
Arthouse/Independent	15%	8%	22%	7%

Q. Thinking specifically about Canadian films, which of the following do you typically like to watch, either at home, or in theatres?
Q. Which of the following movie genres do you typically like to watch, either at home or in theatres?

Drivers of Seeing a Movie Theatrically

	Insiders	Thrills & Frills	Intellects	One-Timers
The cast	55%	62%	57%	56%
Word of mouth from friends and family	40%	43%	50%	52%
The visuals/effects	40%	46%	39%	37%
Positive buzz from critics/festivals/awards	23%	21%	31%	19%
The director/filmmaker	24%	18%	23%	12%
The runtime	19%	16%	16%	15%
Positive buzz from influencers/tastemakers	17%	10%	13%	8%
The IP/franchise	10%	10%	7%	8%
The studio/distributor	9%	8%	3%	2%

Q. Aside from the specific genre or story, what are the most important elements in deciding to see a movie in a theatre? (Please select up to three.)

Barriers to Seeing More Movies Theatrically

	Insiders	Thrills & Frills	Intellects	One-Timers
The cost	64%	67%	78%	75%
There aren't enough movies that I'm interested in seeing in a theatre	28%	42%	42%	42%
There are plenty of movies to watch at home	31%	32%	41%	39%
Not enough time	36%	35%	35%	28%
I don't like the crowds	20%	21%	30%	35%
There aren't theatres near me	8%	8%	11%	13%
It's hard to all decide on the same movie	10%	8%	9%	4%

Q. Below are some reasons others have given as to why they aren't seeing movies in theatres as much as they'd like to. Which, if any, apply to you?

Social Media Platform Usage

	Insiders	Thrills & Frills	Intellects	One-Timers
Facebook	78%	83%	80%	83%
Instagram	62%	62%	57%	50%
TikTok	43%	34%	28%	27%
X (Formerly Twitter)	31%	26%	25%	22%
Pinterest	22%	28%	22%	19%
LinkedIn	27%	22%	23%	16%
Snapchat	22%	22%	22%	18%
Reddit	23%	22%	18%	12%
Tumblr	6%	4%	4%	2%
Threads	4%	3%	3%	2%
BeReal	3%	2%	3%	1%
Letterboxd	4%	1%	2%	1%

Q. Which of the following social media platforms/communication tools do you use at least a few days a week?

Frequency of Media Usage

Use 5+ Days/Week	Insiders	Thrills & Frills	Intellects	One-Timers
Use social media	74%	72%	73%	71%
Watch broadcast TV	54%	55%	51%	60%
Listen to the radio	46%	41%	38%	41%
Read a newspaper (online or in print)	36%	24%	29%	22%
Listen to a podcast	31%	13%	16%	13%
Read a magazine (online or in print)	24%	8%	10%	7%

Q. In a typical seven-day period, how often do you do each of the following?

Appendix

Methodology

The study was conducted in both French and English among an online sample of 2,200 feature film consumers in Canada aged 18 and older, qualified as attending one movie in theatres in the past 12 months or watching at least one movie at home in a typical week.

It was fielded from September 17 through October 2, 2023. Respondents who did not pass a series of stringent quality control checks were removed from the data set prior to analysis. Quotas and weighting were used to ensure the study contained a demographically representative sample that was as close to the the Canadian population as possible.

Adjustment Factors

The figures for feature film consumption are derived from self-reported data. It's important to note that respondents tend to overstate their past consumption. As a result, when this data is utilized to compute total attendance, it yields a number that surpasses actual Canadian box office. To address this discrepancy, an adjustment factor is determined based on the difference between the reported theatrical consumption and the annual Canadian box office attendance. This factor is then applied to the overall sample.

Table and Chart Notes

Summed numbers within certain tables and charts may not total as indicated or add to 100% due to rounding.

Respondent Demographics

	Total
Gender	
Man	48%
Woman	52%
Non-Binary	^
Transgender	^
Two-Spirit	^
Age	
18-24	13%
25-34	19%
35-44	20%
45-54	20%
55-64	17%
65+	11%

	Total
2SLGBTQIA+ Spectrum	
Yes	10%
No	90%
Parent of Child <18	
Yes	30%
No	70%
Level of Education	
Less than high school	3%
Completed high school	19%
Some university (no longer attending)	29%
Currently in university	4%
Completed university	33%
Completed post-graduate	13%

^ indicates less than 0.5%

Respondent Demographics

	Total
Household Language[1]	
English	81%
French	23%
Other	5%
Racial/Ethnic Background	
White	73%
Asian[2]	21%
Black[3]	5%
Latin American	^
Middle Eastern	^
North African	^
Other	2%

	Total
Indigenous Status	
I'm not an Indigenous person	95%
Yes, First Nations	3%
Yes, Métis	2%
Yes, Inuk (Inuit)	^
Yes, international Indigenous	^
Yes, other	^
Disability Self-Identification	
Yes	13%
No	87%

1. The study was fielded in English and French

2. Includes East Asian, West Asian, South Asian, Southeast Asian, Central Asian, Pacific Islander

3. Includes Black African, Black-Caribbean, Afro-Caribbean, Afro-Arab, Afro-Latin

^ indicates less than 0.5%

Margin of Error

	n	M.O.E.[1]
Total Feature Film Watchers	2,200	+/- 2.1
Total Moviegoers	1,710	+/- 2.4
Light Moviegoers	978	+/- 3.1
Moderate Moviegoers	549	+/- 4.2
Heavy Moviegoers	183	+/- 7.2
Non-Attendees	490	+/- 4.4
Men	1,056	+/- 3.0
Women	1,141	+/- 2.9
18–24	283	+/- 5.8
25–34	420	+/- 4.8
35–44	438	+/- 4.7
45–54	434	+/- 4.7
55–64	379	+/- 5.0
65+	247	+/- 6.2

	n	M.O.E.[1]
Segments		
Insiders	492	+/- 4.4
Thrills & Frills	496	+/- 4.4
Intellects	582	+/- 4.1
One-Timers	630	+/- 3.9
Provinces		
Alberta	237	+/- 6.4
British Columbia	278	+/- 5.9
Manitoba	93	+/- 10.2
New Brunswick	64	+/- 12.3
Nova Scotia	75	+/- 11.3
Ontario	846	+/- 3.4
Québec	506	+/- 4.4
Saskatchewan	55	+/- 13.2

1. The maximum margin of error (in percentage points) for each segment at a confidence interval of 95%, assuming an even distribution of data.