



Canadians and Films

Trends observed from three years of surveys
conducted in 2012, 2013 and 2014

August 2014

Background

- Telefilm wants to become a market reference by helping leading industry players learn more about their market, by encouraging reflection on key issues and by eventually fostering content more closely aligned with the needs of the different target markets.
- Several studies have been conducted in recent years with the aim of gaining deeper knowledge and understanding of the movie-consumption habits of Canadians.
- This document presents the trends observed by Ad hoc recherche from three Canada-wide surveys, conducted in 2012, 2013 and 2014.

Methodology

- To determine the key trends, a detailed analysis of the data was performed, comparing the results from the 2013 and 2014 studies (conducted by Ad hoc recherche with 1,800 and 3,078 Canadians, respectively) with those from the 2012 study (conducted by Research Now with 1,859 Canadians).
- Lastly:
 - The population of the three studies consisted of Canadians from all provinces, aged 18 or older in 2012 and 15 or older in 2013 and 2014, and able to express themselves in English or in French.
 - The research was carried out in the form of Web panel surveys.
 - The results have been weighted by region, age and gender in order to accurately reflect the population under study.

Caveat

- Because the 2012 survey was conducted by Research Now and the responses obtained were not available to us, we faced methodological problems due to lack of information:
 1. We did not have precise information on the way people were selected and invited to participate in the 2012 survey, or on the quotas set for the collection of data.
 2. The survey addressed the entire Canadian population, including people not watching movies on an annual basis. We therefore extracted those people from the 2012 sample to improve the comparability of results.
 3. Since 2012 was a “first draft,” some questions were eliminated and others added in 2013. As a result, only the questions that were identical over the three years could be compared.

Respondent profiles



RESPONDENT PROFILES LARGELY SIMILAR FROM YEAR TO YEAR

- Overall, the breakdown of respondents based on the main socio-demographic variables is the same across all the surveys:
 - After weighting to balance the three samples, the distribution in terms of province, major region and gender is closely similar.
 - However, in 2013 and 2014 we see more respondents living in a city (57% and 53% vs. 46% in 2012) and slightly fewer university graduates (38% and 39% vs. 45% in 2012).

	TOTAL		
	2012 n=1,859	2013 n=1,800	2014 n=3,078
Province			
Alberta	10%	11%	9%
British Columbia	12%	13%	14%
Manitoba	6%	4%	5%
New Brunswick	2%	2%	2%
Newfoundland/Labrador	2%	2%	1%
Nova Scotia	3%	3%	3%
Ontario	38%	38%	38%
Prince Edward Island	0%	0%	1%
Quebec	24%	24%	24%
Saskatchewan	3%	3%	3%
Major regions			
Quebec	24%	24%	24%
Ontario	38%	38%	38%
West	31%	31%	31%
Atlantic	7%	7%	7%
Place of residence			
In a city	46% ↓	57% ↑	53% ▼
In a suburb of a large city	38% ↑	26% ↓	26%
In a rural area	16%	18%	21% ▲
Gender			
Male	49%	49%	49%
Female	52%	51%	51%
Education			
SUBTOTAL : High school or less	20% ↓	28% ↑	27%
SUBTOTAL : College	35%	34%	34%
SUBTOTAL : University	45% ↑	38% ↓	39%
Income			
SUBTOTAL : Less than \$40,000	26% ↑	22% ↓	21%
SUBTOTAL : From \$40,000 to \$79,900	38%	41%	37% ▼
SUBTOTAL : \$80,000 or more	36%	38%	42% ▲

Base: all respondents

▲ ▼ : indicate significant differences between 2014 and 2013
 ↑ ↓ : indicate significant differences between 2012 and 2013

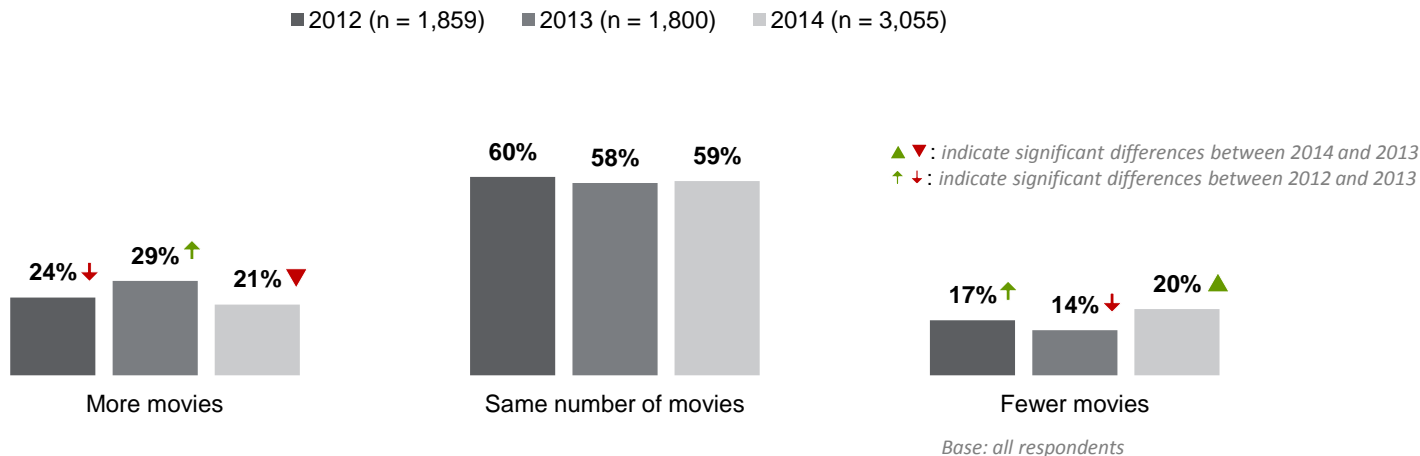
MOVIE CONSUMPTION DOWN IN 2014



- **Several movie-consumption frequency indicators are down this year.** The most telling is Canadians' perceived consumption of movies. In 2014 we see near parity between consumers who felt they watched more and those who felt they watched fewer than in the previous year (respectively 21% and 20% - see graphs on next page).
 - This result marks a sharp change from the study done in 2013, when twice as many consumers felt they watched more movies than in the previous year (respectively 29% and 14%) and, to a lesser extent, from the 2012 study (24% and 17%).
 - The reasons spontaneously given by Canadians (open-ended question, no pre-specified answers) to explain the perceived decrease in movie consumption revolve primarily (72%) around **lack of free time** (work, children, studies, etc.) to spend watching movies.
 - Respondents also spontaneously mentioned other, more secondary reasons, notably **the shift toward series** (7% of mentions) and **the increasingly prohibitive cost of movie going** (3%).
 - The reported average annual frequency of movie watching fell from 85 to 78 films a year between 2013 and 2014 (figures not available for 2012).
 - Nevertheless, the practice is still firmly ingrained in Canadians' habits, since more than half of the respondents watch at least one movie a week (53% and 52% respectively in 2013 and 2014).

Evolution of movie watching

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



Television series: the culprit

- Drama series and soap operas no doubt largely explain the decrease in movie consumption. They emerge as **the cultural product most consumed by Canadians**: more than four out of five (81%) of the Canadians surveyed watch them at least once a week (vs. 52% for movies), for an average overall frequency of 174 episodes a year. Furthermore, about a quarter of those surveyed (24%) reported consuming more series than in the previous year.

↪ The episode format, comparatively shorter than a movie, greatly contributes to this significantly higher watching frequency. Also, the variety of available genres is better than ever, as is accessibility via various delivery platforms.

↪ This **content is now fully integrated into viewing habits**. Series are clearly competing with movies for Canadian consumers' discretionary viewing time. In fact, watching series **live on TV** is a weekly, or more, ritual for nearly two out of three Canadians (63% vs. 30% for movies). **Consequently, Canadians are far more committed to series than to movies.**



DIGITAL VIEWING MODES INCREASINGLY POPULAR



- **In 2014, movie watching is still a multiplatform event.** The means for accessing content have never been so numerous and so democratized. The Canadians consulted use the following viewing platforms for movies **at least once a month**:
 - Movie theatre (26%)
 - Owned DVD / Blu-Ray (41%)
 - Digital device (17%)
 - Video on demand or pay-per-view (22%)
 - Live TV (63%)
 - Paid streaming, per movie or by subscription (30%)

- **The substantial decline in movie watching in 2014 affects the majority of platforms. Two of them are particularly hard hit:**
 - **Movies on DVD / Blu-Ray**, which were watched at least once a week by 25% of Canadians in 2012 and 19% in 2013 but just 14% in 2014 (respectively 52%, 48% and 41%, based on the mentions “at least once a month”).
 - **Movies watched live when broadcast on television.** Nearly half of Canadians watched this way each week in 2012 (49%), but only 32% in 2013 and 30% in 2014.
- **Two platforms have been on the rise since 2012:**
 - **Paid streaming, per movie or by subscription** (Netflix, Illico Club Unlimited, etc.), is an increasingly used means of viewing (18% in 2014 vs. 14% in 2012). It is the only platform that shows growth across the three years.
 - **Movies watched on a mobile device** (tablet, smartphone, PSP, etc.), with monthly use of 9% in 2012 and 17% in 2014 (4% and 6%, respectively, on a weekly basis).

Viewing methods

QA7br- fr These days you can watch movies in different places and on various technological platforms. How often would you say you have used the following means in the past year?
QA8Lr

Annual average	TOTAL		
	2012 n=1,859	2013 n=1,800	2014 n=2,404
Movies seen at a theatre			
Less than once a month	74% ↑	70% ↓	75% ▲
A few times a month	21% ↓	25% ↑	23% ▼
Once a week or more	5%	5%	3% ▼
Movies on owned DVD/Blu-Ray/VHS			
Less than once a month	47% ↓	53% ↑	59% ▲
A few times a month	28%	29%	27%
Once a week or more	25% ↑	19% ↓	14% ▼
Movies on a mobile device such as iPad or other tablet, smartphone, Sony PlayStation Portable (PSP), etc..			
Less than once a month	91% ↑	80% ↓	83% ▲
A few times a month	5% ↓	11% ↑	11%
Once a week or more	4% ↓	9% ↑	6% ▼
Movies watched through video-on-demand or pay-per-view television (Fibe, Illico, etc.)			
Less than once a month	77% ↑	72% ↓	78% ▲
A few times a month	15%	16%	15%
Once a week or more	8% ↓	12% ↑	7% ▼
Movies watched live on television when broadcast			
Less than once a month	28% ↓	38% ↑	37%
A few times a month	23% ↓	31% ↑	33%
Once a week or more	49% ↑	32% ↓	30%
Paid streaming, per movie or by subscription (Netflix, iTunes, etc.)			
Less than once a month	79% ↑	72% ↓	70%
A few times a month	8% ↓	12% ↑	12%
Once a week or more	14% ↓	17% ↑	18%

Base: all respondents

▲ ▼ : indicate significant differences between 2014 and 2013

↑ ↓ : indicate significant differences between 2012 and 2013

Viewing methods (by region)

QA7 These days you can watch movies in different places and on various technological platforms. How often would you say you have used the following means in the past year?
QA8

Moyenne annuelle	Region											
	West			Ontario			Quebec			Atlantic		
	2012 n=566	2013 n=457	2014 n=538	2012 n=721	2013 n=463	2014 n=571	2012 n=446	2013 n=442	2014 n=769	2012 n=126	2013 n=438	2014 n=526
Movies seen at a theatre												
Less than once a month	76%	71%	73%	73% ↑	67% ↓	72%	75%	72%	79% ▲	72%	71%	81% ▲
A few times a month	19% ↓	25% ↑	23%	22% ↓	28% ↑	25%	20%	21%	20%	21%	24%	17% ▼
Once a week or more	5%	4%	4%	5%	5%	3%	5%	7%	2% ▼	6%	4%	3%
Movies on owned DVD/Blu-Ray/VHS												
Less than once a month	48%	51%	54%	46%	48%	55% ▲	49% ↓	60% ↑	68% ▲	42% ↓	57% ↑	69% ▲
A few times a month	29%	30%	31%	27% ↓	33% ↑	29%	24%	21%	20%	37% ↑	24% ↓	23%
Once a week or more	22%	20%	16%	27% ↑	19% ↓	17%	27% ↑	19% ↓	12% ▼	21%	19%	8% ▼
Movies on a mobile device such as iPad or other tablet, smartphone, Sony PlayStation Portable (PSP), etc.												
Less than once a month	90% ↑	82% ↓	78%	91% ↑	77% ↓	84% ▲	95% ↑	82% ↓	87% ▲	90% ↑	82% ↓	85%
A few times a month	7%	9%	15% ▲	5% ↓	14% ↑	11%	2% ↓	10% ↑	7%	5%	11%	9%
Once a week or more	4% ↓	9% ↑	8%	4% ↓	9% ↑	6%	3% ↓	8% ↑	6%	5%	8%	6%
Movies watched through video-on-demand or pay-per-view television (Fibe, Illico, etc.)												
Less than once a month	76%	75%	78%	75% ↑	68% ↓	78% ▲	78%	74%	74%	88% ↑	74% ↓	84% ▲
A few times a month	18%	16%	13%	15% ↓	20% ↑	16%	14%	12%	16%	8%	11%	13%
Once a week or more	7%	9%	8%	10%	13%	6% ▼	8% ↓	14% ↑	9% ▼	5% ↓	15% ↑	4% ▼
Movies watched live on television when broadcast												
Less than once a month	29% ↓	39% ↑	38%	30% ↓	37% ↑	36%	23% ↓	35% ↑	36%	30% ↓	39% ↑	43%
A few times a month	26% ↓	33% ↑	36%	23% ↓	32% ↑	34%	22%	26%	30%	21%	28%	30%
Once a week or more	45% ↑	28% ↓	26%	47% ↑	30% ↓	31%	55% ↑	39% ↓	34%	49% ↑	33% ↓	27% ▼
Paid streaming, per movie or by subscription (Netflix, iTunes, etc.)												
Less than once a month	77% ↑	67% ↓	62%	78% ↑	69% ↓	69%	84%	82%	82%	70%	66%	69%
A few times a month	8% ↓	15% ↑	14%	8% ↓	11% ↑	13%	5% ↓	8% ↑	8%	13%	12%	11%
Once a week or more	14%	18%	24% ▼	15% ↓	20% ↑	18%	11%	10%	10%	17%	23%	21%

Base: all respondents

▲ ▼: indicate significant differences between 2014 and 2013
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THE INDUSTRY NEEDS TO BUILD MORE EXCITEMENT FOR ITS MOVIES



- **The analysis of Canadians' criteria for choosing a movie suggests a certain indifference to a movie's key features and elements.**
- The importance attributed to each of the following elements has declined since the initial measurement in 2012:
 - Cast (average score out of 10: 7.0 in 2012, 6.8 in 2013 and 6.6 in 2014)
 - Awards, e.g., Oscar, Jutra, Canada Screen Award (5.4, 4.9 and 4.6, respectively)
 - Director (4.8, 4.4 and 4.2, respectively)
 - Script (4.2, 3.7 and 3.6, respectively)
- **The genre** (sci-fi, drama, comedy, etc.) remains the key element when it comes to choosing a movie. It ranks highest among the ten elements assessed and is the only one with an overall average close to 8 out of 10 (8.0 in 2012, 8.1 in 2013 and, down slightly, 7.8 in 2014).
- **The subject / story / facts and/or book on which the movie is based** is also an important movie choice criterion for more than half of the respondents (average score steady at 7.4 / 7.3 across the three years).

Movie choice criteria (cont.)

QB3 How important are the following when it comes to choosing a movie?

	TOTAL		
	2012 n=1,859	2013 n=1,800	2014 n=3,078
The movie's director			
SUBTOTAL : Not important	34% ↓	40% ↑	43% ▲
SUBTOTAL : Somewhat important	50% ↑	45% ↓	45%
SUBTOTAL : Very important	16%	15%	12% ▼
Average	4,8 ↑	4,4 ↓	4,2 ▼
The cast			
SUBTOTAL : Not important	7% ↓	10% ↑	11%
SUBTOTAL : Somewhat important	45%	45%	49% ▲
SUBTOTAL : Very important	48%	45%	41% ▼
Average	7,0 ↑	6,8 ↓	6,6 ▼
The country of origin			
SUBTOTAL : Not important	44% ↓	51% ↑	50%
SUBTOTAL : Somewhat important	44% ↑	38% ↓	40%
SUBTOTAL : Very important	13%	11%	10%
Average	4,2 ↑	3,8 ↓	3,8
The genre (sci-fi, drama, comedy, etc.)			
SUBTOTAL : Not important	3%	3%	4% ▲
SUBTOTAL : Somewhat important	29% ↑	26% ↓	28%
SUBTOTAL : Very important	69%	72%	68% ▼
Average	8,0	8,1	7,8 ▼
The screenwriter			
SUBTOTAL : Not important	43% ↓	50% ↑	54% ▲
SUBTOTAL : Somewhat important	48% ↑	41% ↓	40%
SUBTOTAL : Very important	9%	9%	7% ▼
Average	4,2 ↑	3,7 ↓	3,6 ▼

	TOTAL		
	2012 n=1,859	2013 n=1,800	2014 n=3,078
The topic / story / facts and / or the book the movie is based on			
SUBTOTAL : Not important	7%	8%	7%
SUBTOTAL : Somewhat important	36%	35%	37%
SUBTOTAL : Very important	58%	57%	56%
Average	7,4	7,3	7,3
Word of mouth, recommendations from friends or family			
SUBTOTAL : Not important	5% ↓	8% ↑	N.A.
SUBTOTAL : Somewhat important	34% ↓	39% ↑	N.A.
SUBTOTAL : Very important	61% ↑	53% ↓	N.A.
Average	7,6 ↑	7,2 ↓	N.A.
The soundtrack			
SUBTOTAL : Not important	37%	37%	39% ▲
SUBTOTAL : Somewhat important	51%	49%	50%
SUBTOTAL : Very important	11% ↓	14% ↑	11% ▼
Average	4,5	4,5	4,4 ▼
The fact that it is a Quebec movie			
SUBTOTAL : Not important	29% ↓	44% ↑	39%
SUBTOTAL : Somewhat important	48% ↑	41% ↓	46%
SUBTOTAL : Very important	23% ↑	16% ↓	15%
Average	5,3 ↑	4,3 ↓	4,5
The awards won (Oscar, Jutra, Canadian Screen Award, festival awards)			
SUBTOTAL : Not important	28% ↓	33% ↑	37% ▲
SUBTOTAL : Somewhat important	47%	47%	46%
SUBTOTAL : Very important	25% ↑	20% ↓	16% ▼
Average	5,4 ↑	4,9 ↓	4,6 ▼

→ This statement concerns Quebec respondents only

Base: all respondents

▲ ▼ : indicate significant differences between 2014 and 2013
 ↑ ↓ : indicate significant differences between 2012 and 2013

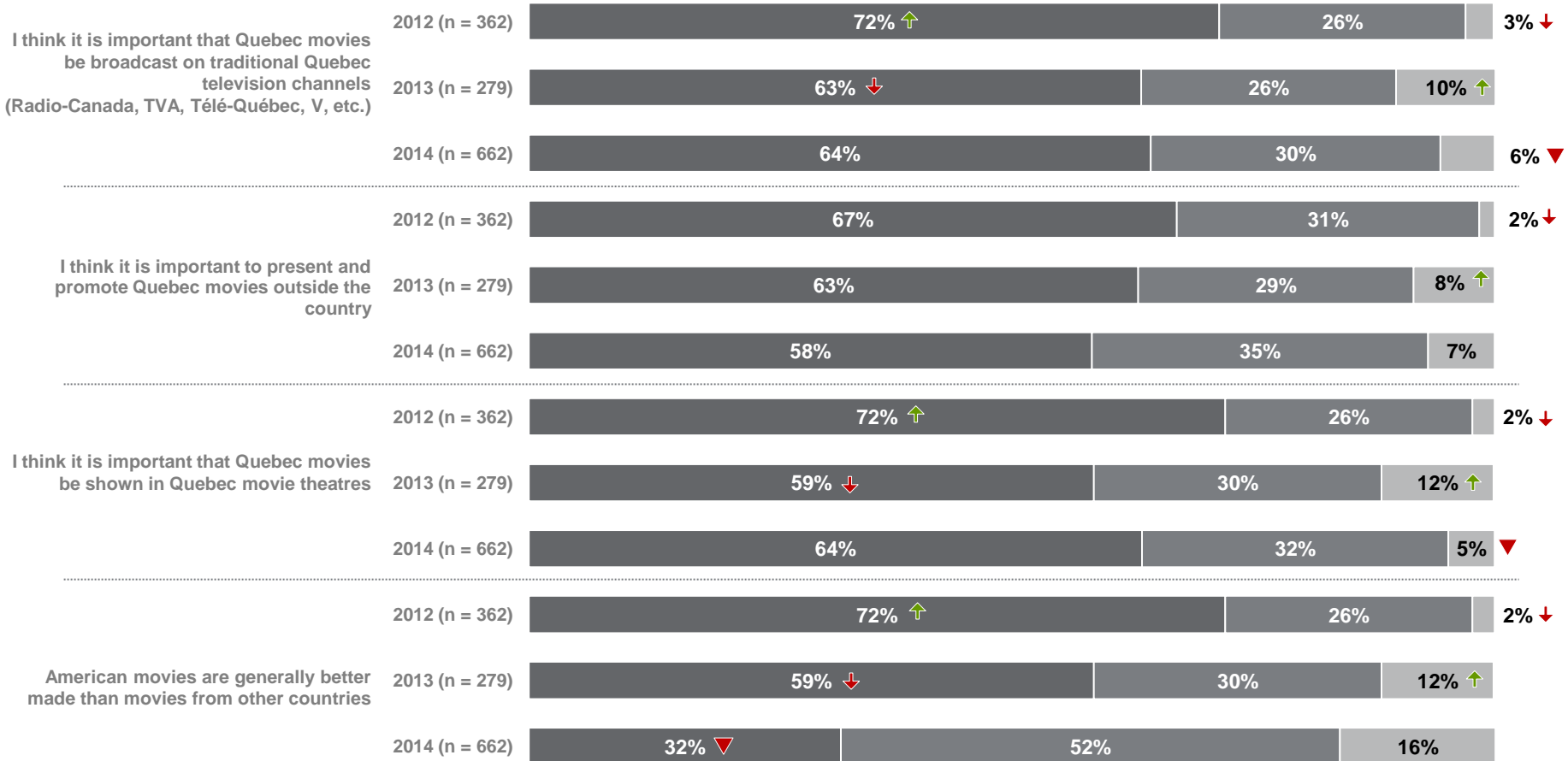
**FRENCH-SPEAKING
CANADIANS HAVE A
GENERALLY POSITIVE VIEW
OF THEIR FILM INDUSTRY
BUT THAT OPINION IS
UNDER PRESSURE**

- **A majority of French-speaking Canadians agreed with several statements about their film industry.** However, some key indicators reflect waning enthusiasm:
 - **“I think it is important that Quebec movies be broadcast on traditional Quebec television channels (Radio-Canada, TVA, Télé-Québec, V, etc.)”** Although 64% of the French-speaking Quebecers agreed, this is down from the peak in 2012 (72%).
 - The same goes for this statement: **“I think it is important that Quebec movies be shown in Quebec movie theatres,”** which dropped from 72% in 2012 to 64% this year.
 - French-speaking Quebecers show a declining appreciation of the importance of showcasing homegrown movies outside the country. Agreement with the statement **“I think it is important to present and promote Quebec movies outside the country”** fell from 67% in 2012 to 63% in 2013 and to 58% in 2014.
 - **“The acting, directing and production ensure that the quality of Quebec movies is as good as that of movies from other countries.”** This remains an important element (55%), and even though agreement was down compared to 2012 (62%), it rose slightly from 2013 (50%).
- **All players must make a concerted effort** to maintain the industry’s image, promote its contribution to Quebec society and its various benefits, and develop a stronger sense of belonging in the population. That said, two pieces of good news emerge from the charts on pages 13 and 14:
 - Agreement with the statement **“American movies are generally better made than movies from other countries”** has plummeted since 2012, falling from 72% to 59% in 2013 and then to 32% in 2014. No other indicator has seen such a drop.
 - Very few of the French-speaking Quebecers (from 2% to 16%) disagreed with any of the statements, demonstrating that, while there is still work to do, the industry is faring well overall.

Perception of the French-language industry

QC2. Please indicate your level of agreement with each of the following statements about the film industry.

■ Agree ■ Neither agree nor disagree ■ Disagree



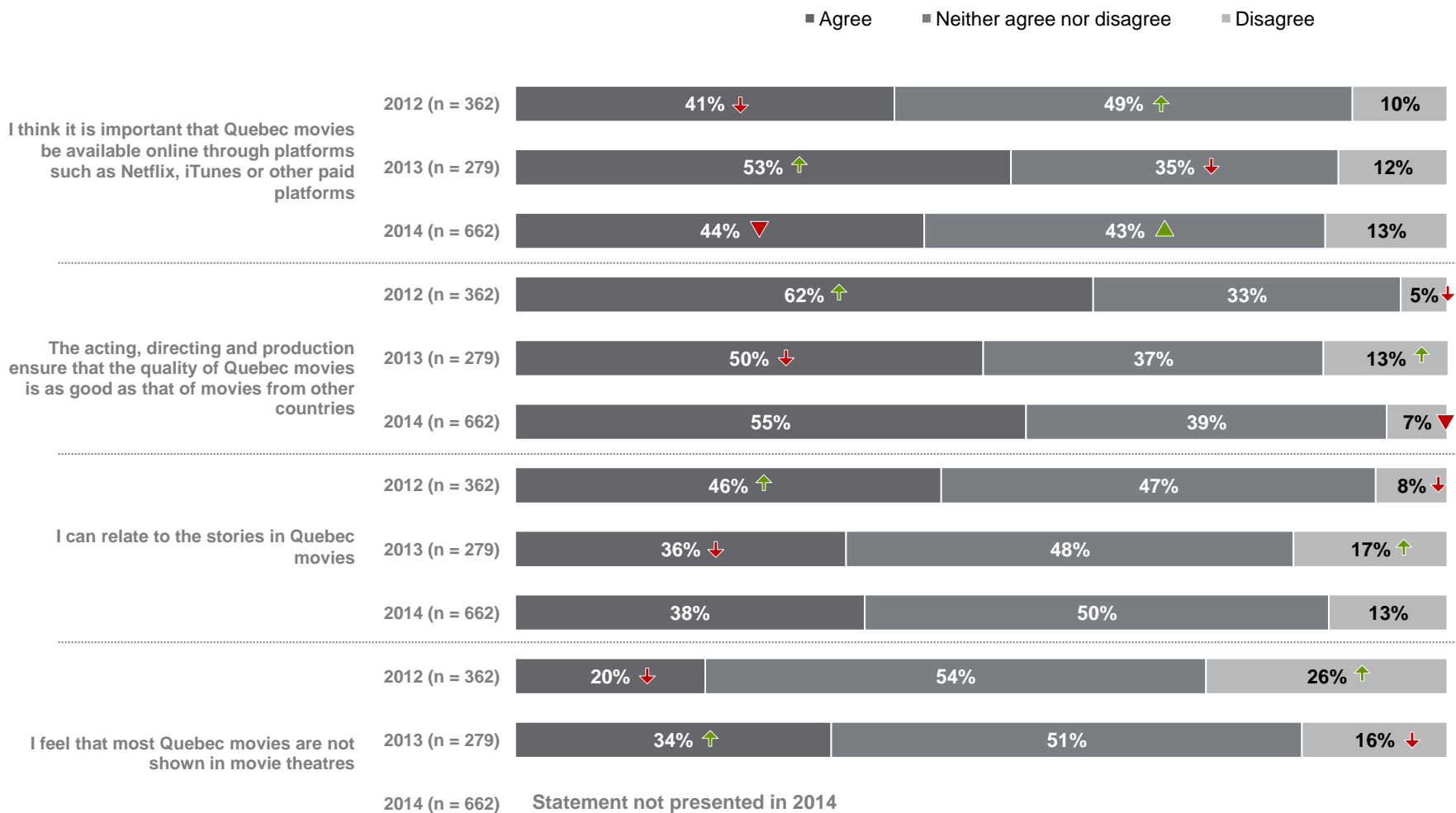
Base: French speakers in Quebec

▲ ▼: indicate significant differences between 2014 and 2013

↑ ↓: indicate significant differences between 2012 and 2013

Perception of the French-language industry (cont.)

QC2. Please indicate your level of agreement with each of the following statements about the film industry.



Base: French speakers in Quebec

▲▼: indicate significant differences between 2014 and 2013

↑↓: indicate significant differences between 2012 and 2013

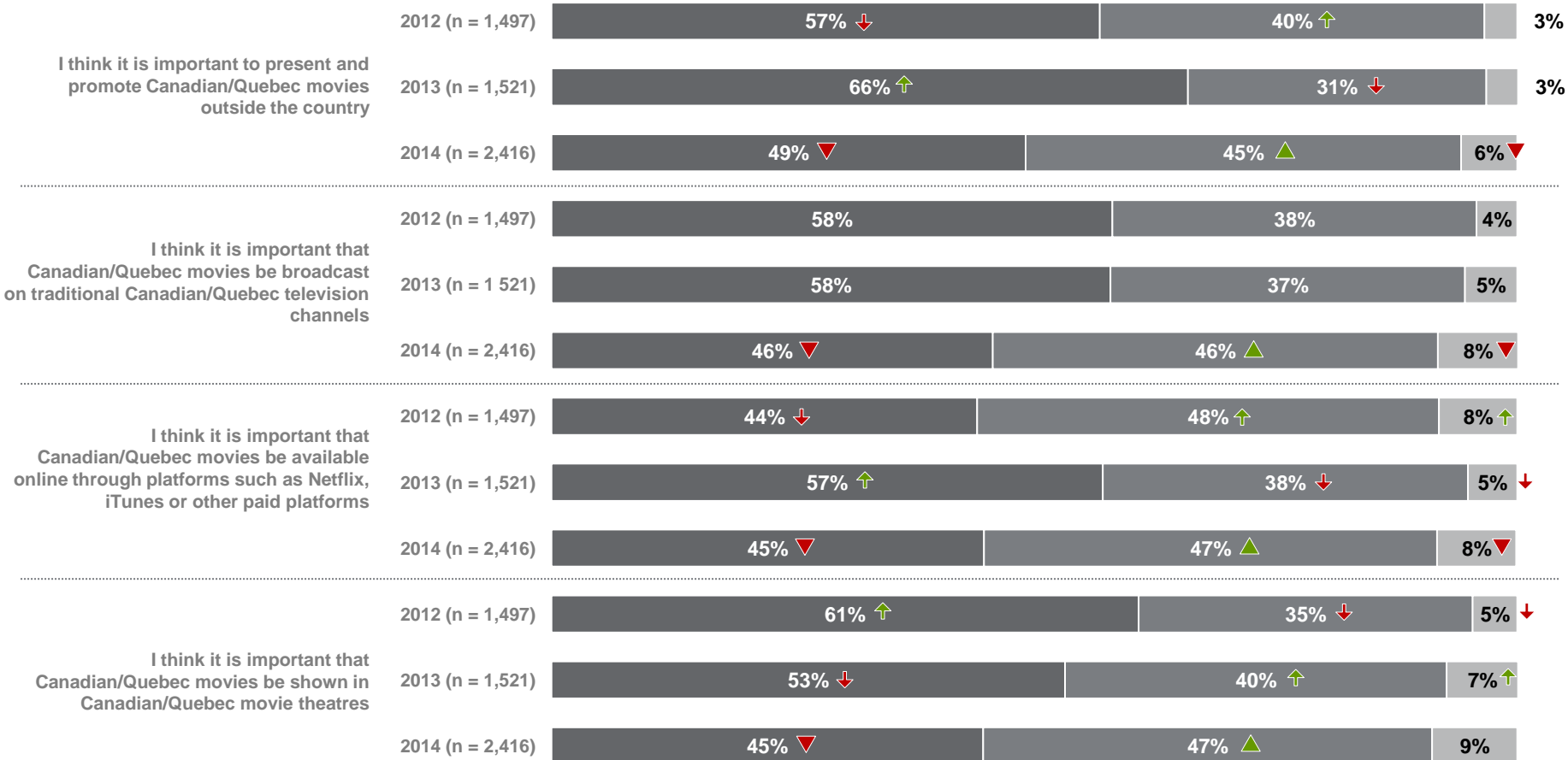
TO BUILD A POSITIVE PERCEPTION OF THE INDUSTRY AMONG ENGLISH-SPEAKING CANADIANS, MUCH REMAINS TO BE DONE

- The perception of the film industry held by English-speaking Canadians is fairly similar to that held by French-speaking Canadians insofar as:
 - Very few English-speaking Canadians disagreed with the various statements (from 3% to 17%)
 - Several indicators are down this year compared to 2012, notably:
 - **“I think it is important to present and promote Canadian movies outside the country”** (49% in 2014 vs. 57% in 2012).
 - **“I think it is important that Canadian movies be broadcast on traditional Canadian television channels”** (46% in 2014 vs. 58% in 2012).
 - **“I think it is important that Canadian movies be shown in Canadian movie theatres”** (45% in 2014 vs. 61% in 2012).
 - **“The acting, directing and production ensure that the quality of Canadian movies is as good as that of movies from other countries”** (35% in 2014 vs. 40% in 2012).
 - **“American movies are generally better made than movies from other countries”** is also sharply down from 2012, dropping from 61% that year to a mere 36% in 2014.
- However, **the English-speaking Canadians were far less positive about their industry than French-speaking Canadians.** The proportions of people agreeing with the different indicators are generally 9% to 20% lower in English-speaking Canada. Nevertheless, the two consumer segments are on the same wavelength in regard to these two indicators:
 - **“I think it is important that Canadian movies be available online through platforms such as Netflix, iTunes or other paid platforms.”**
 - **“American movies are generally better made than movies from other countries.”**

Perception of the Canadian industry

QC2. Please indicate your level of agreement with each of the following statements about the film industry..

■ Agree ■ Neither agree nor disagree ■ Disagree



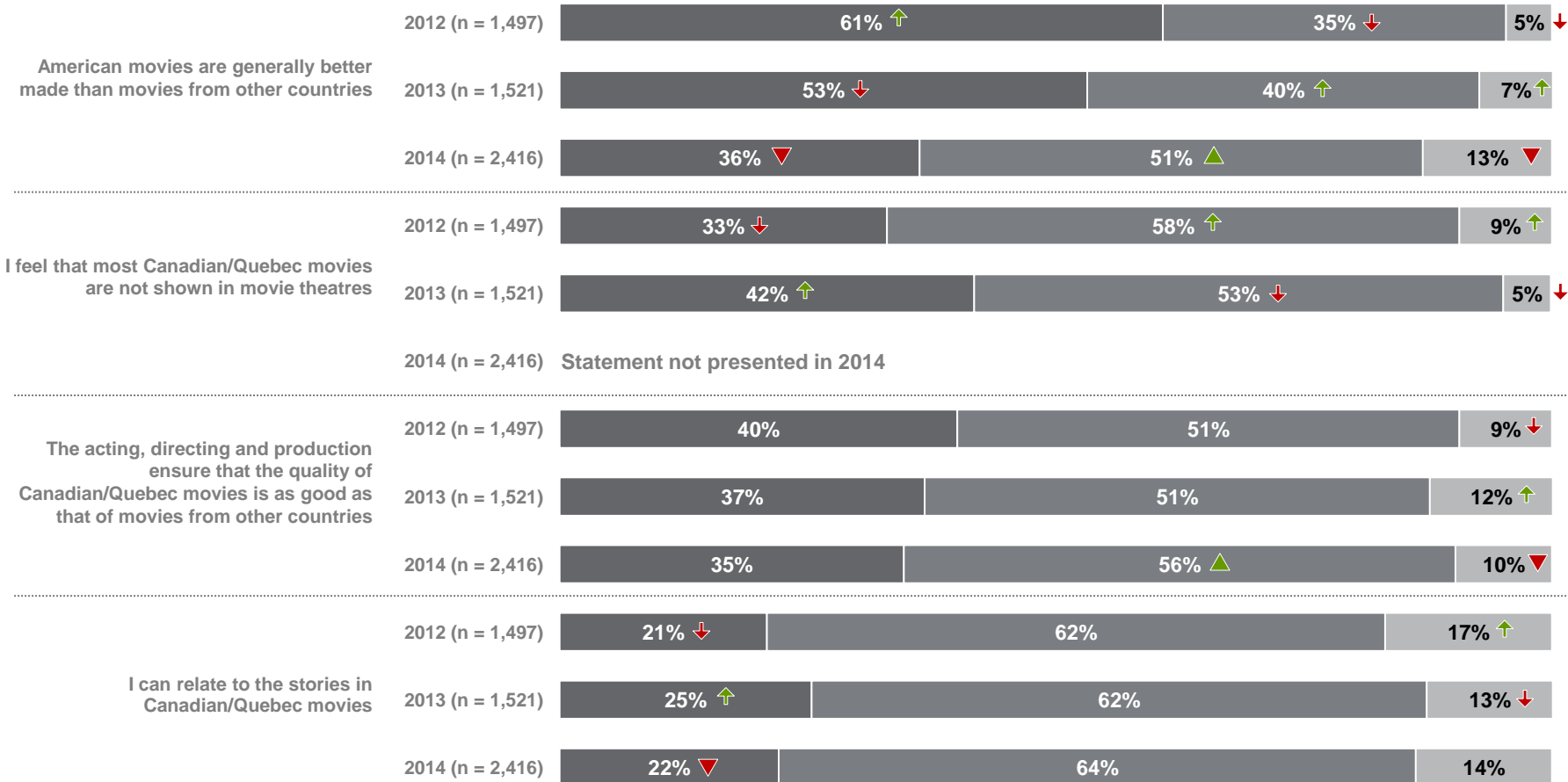
Base: English-speaking Canadians

▲▼: indicate significant differences between 2014 and 2013
 ↑↓: indicate significant differences between 2012 and 2013

Perception of the Canadian industry (cont.)

QC2. Please indicate your level of agreement with each of the following statements about the film industry..

■ Agree ■ Neither agree nor disagree ■ Disagree



Base: English-speaking Canadians

▲ ▼ : indicate significant differences between 2014 and 2013

↑ ↓ : indicate significant differences between 2012 and 2013

**LOCAL PRODUCTS
EASIER TO IDENTIFY
FOR FRENCH-SPEAKING
CANADIANS**

- Just as in 2013, the 2014 study shows that French-speaking Canadians are far more able to identify homegrown movies than are English-speaking Canadians.

French-speaking Canadians

- **French-speaking Canadians are more aware of local movies.** Those in the two groups were better able to identify the origin of the movies presented and easily picked out those from Quebec, particularly *Louis Cyr* and *Gabrielle*, recognized as such by 99% and 96%, respectively.
 - Furthermore, more than 8 out of 10 Quebec respondents said they could name an English-language or French-language Canadian movie (85%) or TV series (87%). An impressive result compared to the responses obtained from the English-speaking Canadians, of whom just 38% said they could name an English-language Canadian movie and 59% an English-language Canadian TV series.

English-speaking Canadians

- The English-speaking Canadians **had difficulty guessing the origin of the movies** presented to them, and in almost all cases less than 50% of their answers were correct.