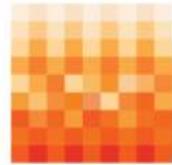


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How Canadians select audiovisual content

Focus groups in Montreal, Sherbrooke, Toronto and Vancouver

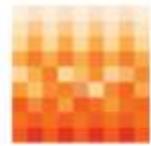
Final Report
July 21, 2014

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Note

Funding for this study was provided by Telefilm Canada, the Canada Media Fund and the Société de développement des entreprises culturelles (SODEC). Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Telefilm Canada, the Canada Media Fund, the SODEC, the Government of Canada or the Government of Quebec. The funders are in no way bound by the recommendations contained in this document.



Executive summary - insights for the industry

This report is based on Canadian consumer insights established through eight focus group discussions held in Sherbrooke (Quebec), Montreal (Quebec), Toronto (Ontario) and Vancouver (British Columbia). The study was commissioned by Telefilm Canada, the Canada Media Fund and the Société de développement des entreprises culturelles and follows previous research commissioned by Telefilm Canada from which market segments were identified. These same market segments were used to preselect focus group participants, falling into either the Active-at-home or Connected/Superviewer categories. These consumers demonstrate heavy viewing behaviour in both the television and film categories and are therefore interesting audiences for the Canadian audiovisual industry to better understand and potentially target. In this study, It is interesting to observe that although the Connected/Superviewers watch more content and use a higher number of platforms to access content, the selection process of the members of the two groups seem to be very similar.

Executive summary - insights for the industry

1

Content consumption is shifting to on-demand, ad-free viewing



- **Immediacy is becoming the norm and video content is more accessible than ever**, owing to the proliferation and democratization of video content sources and platforms. Most of the behaviours reported tend toward **on-demand viewing**: participants create their own schedule and watch content when and where they want.
- Although **live TV** is still the **main** source used, it is increasingly losing ground to means such as the personal video recorder (PVR), **streaming** (free or paid) and, to a lesser extent, **free download** and video on demand (VOD). Almost all of the participants consulted across the country use one or more of these means.
 - **The use of PVR emerged strongly** in all of the groups. This technology has massively penetrated households and makes it possible to skip ads by delaying viewing for minutes, hours, days or weeks.
 - **Netflix is almost ubiquitous** in Toronto and Vancouver, and is making major inroads in bilingual Montreal households (Sherbrooke tends more to French-language content on Illico or Tou.tv).
- **The effect of personal catalogues**: Like free download content or Netflix or VOD lists, PVR is becoming an aggregator, a way to accumulate ad-free content (series or movies) based on a summary preselection.

- **Both movies and series** are watched mainly for **entertainment and relaxation**. Most consumers in the groups expressed no clear distinction between the two, other than that the currently available series (mainly American) rival or even surpass movies in terms of quality and innovative themes (raising expectations for movies, particularly in theatres).
 - Series can deal with much **darker or provocative areas** and create a **denser, more complex world** than that of a movie.
- In addition, the **flexibility of series** affords advantages that allow them to encroach on viewing time previously spent on movies: plots that maintain suspense, longer, deeper engagement over time, consumption by single episode or binge-viewing – all that supported by a viral phenomenon of conversation and word of mouth, with most people saying they are on the lookout for their next series.
- **Binge-viewing**, enabled by various sources that make entire seasons available, greatly boosts the consumption of series. Lastly, episode running time is more convenient when free time is limited.

2

The **distinction** between movie and series worlds is **increasingly blurred** – to the benefit of series viewing

Executive summary - insights for the industry

3

Most movies are **watched at home**, a choice requiring little involvement and dependent on mood

Movie-going is a less frequent **social event**, with the choice of movie often predetermined



4

In a context of proliferating content, tools are needed to **simplify consumer choice**

- Most movies are **watched at home** mainly to relax at the end of the day – hence a relatively low level of involvement. A more cerebral movie thus, in a way, becomes a niche product. Making a choice can be very fast or very time-consuming, depending on the number of people watching the movie or each person's tastes.
 - By and large, it is **mood** (and thus **genre**) that heavily influences spur-of-the-moment choice, since a consumer's mood is not static from day to day.
 - Then come the other **criteria/quality indicators** (actors, trailers, with whom watching, story/synopsis, word of mouth, reviews and recommendations, etc.).
- Choosing a **movie is not done in a rigorous or systematic way**. Consumers consider multiple criteria, of course, but the process unfolds over time and is not strictly linear. When the time comes to make a choice, most already have in mind a preselection on which the other criteria are brought to bear. To be selected, a movie must have widespread buzz, ideally on all platforms.
- **Movie-going** is considered a **social event**, often reserved for **major productions** with visual and sound effects. However, such events are **infrequent** (once every 1 to 3 months) due to the cost of the outing, seen to be increasingly high. In **most cases**, the participants know which movie they want to see in a theatre.
- The accessibility and abundance of content on diverse sources require the help of tools that **simplify the choice process** (which can take 30 minutes or up to two hours in extreme cases). A first level is already in place, including the categorization by genre or new releases on VOD, Netflix or streaming sites, and recommendations based on movies or series previously watched.
- Some participants would like to have **more effective or advanced algorithms** for searching according to a list of personalized criteria, or to get recommendations better suited to their tastes or mood.

Executive summary - insights for the industry

5

Difference between perceptions of the French-language and English-language Canadian industries

- **Canada's French-language industry** fares better than the English-language industry and captivates with its humour, local aspect and close proximity to French speakers' reality. In Quebec, there is an awareness, a pride and a sense of belonging with regard to the industry, which is not the case in English-speaking Canada.
 - Within the Montréal and Sherbrooke groups, the industry enjoys greater awareness and a relatively positive image enhanced in recent years by:
 - › major media coverage of certain movies (*Incendies*, *Louis Cyr*, etc.)
 - › nominations or awards received in various official competitions (*Incendies*, *M. Lazhar*, *Rebelle*, etc.)
 - › easy recognition of Quebec content (accent, actors)
 - › a range of series considered quite diverse and of growing quality
 - Also, the French-language industry appears to benefit from **its own star system**, which is not true of the English-language industry. English-speaking Canada does have well-known names – but they often work in Hollywood. Quebec directors work on the international stage but many continue to produce content in Canada.
 - › Even a few Toronto and Vancouver participants spontaneously mentioned directors from Quebec (Denis Villeneuve, etc.), demonstrating this increased visibility.
- **Canada's English-language industry** is poorly known and burdened by prejudices (conservative, rural, not innovative). The participants in all groups struggled to name Canadian movies (or series) made in English, and it was mainly the series *Flashpoint* that stood out as an English-language Canadian success.
- **Origin plays a secondary role** in the choice of video content.
 - However:
 - › Knowing the origin sometimes can arouse curiosity and lead to considering the content – or can strengthen the intention to see a movie that has already caught the consumer's interest.
 - › While quality (in terms of criteria) is important, some participants said they are more prepared to pay for Canadian content (instead of getting it free) or to go to a theatre to see a Canadian movie. However, this is a distinctly secondary benefit.
 - The vast majority felt that the variety and production quality of Canadian movies do not measure up to American or international productions but said they are **open to content focused on humour or to a solid script**, provided it is original and compelling – a good story does not always need Hollywood visual standards.

Executive summary - insights for the industry

The following chart illustrates the highlights of the study.

Content offer

- **Entertainment and relaxation** are the main motivations for watching audiovisual content. Most people prefer comedies or action films – and much less so-called cerebral content.
- **Mood (and thus genre)** is the main filter in making a choice. Then come the other criteria/quality indicators (actors, trailer, with whom watching, story/synopsis, word of mouth, reviews and recommendations, etc.).
- **“Good” content** helps feed the original buzz through its quality (in terms of experience, actors and script). In this age of social media and instant information, productions with smaller budgets (compared to American productions, for example) must more than ever stand out either for exceptional quality or for a creative approach.

Most participants said that **expanding the variety of genres on offer** would encourage them to watch more English- or French-language Canadian content, because greater variety could **suit different moods or occasions**. Just as a trailer is important, a striking image or a good synopsis on a source can influence choice.

Sources of awareness

- **Most consumers** gradually and almost unconsciously gather information about movies and series from diverse sources.

MOVIES

- **Trailers (primary)**
- *Word of mouth*
- *Internet (specialized sites or Facebook)*
- *Other advertising (billboard, etc.)*
- *Recommendations and reviews*
- *Box-office performance*

SERIES

- **Word of mouth (primary)**
 - *Including Facebook*
- *TV spots*
- *Internet (specialized sites or Facebook)*
- *Recommendations and reviews*
- *Availability/featured on a source*

Access to content

- **Availability on a given source** favours discovery and choice, because it exposes the consumer to the offer and provides **access**: content available or featured on a source will be considered (for download, streaming, VOD, PVR, DVD, etc.).
- **Fairly simple, visual classification** (offered on some sources, for example, New Releases on VOD and Recommended for You on Netflix) attracts attention and is often consulted first.
- The **national broadcaster sites** (CTV, Global) **now limit free access** (latest episode, for about 7 days) – a frustration pour some and yet another reason to turn to less official sources. Unrestricted content has a better change of being watched.

The more English- or French-language Canadian content is **present** on the different sources used, the greater the chance that it will be noticed. Also, the industry must ensure that the various suppliers (Videotron, Bell, Rogers and even Netflix) give homegrown content prominent placement. However, support for **place-of-origin labelling** is mixed: welcomed in Quebec owing to the industry’s relatively positive image and an attachment to local content but unfavourable for English-language Canadian content, handicapped by negative prejudices.

Price

- Many consumers have reached **the breaking point in regard to** the cost of movie-going. The current model seems to favour major productions.
- A subscription model (**unlimited use** at an affordable flat rate) is by far preferred to a one-at-a-time or free-with-ads model.
- **The absence of ads** is seen as an asset that saves time and encourages binge-viewing. For people who use them, free streaming and download offer unbeatable value (and accessibility) – despite some loss of quality.

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Context, objectives and methodology

Context and objectives

Context



- Telefilm Canada has gathered information through primary research regarding the audiovisual content consumers watch, but little is known about the decision-making process behind the choice of a movie or series.
- This study, undertaken in partnership by Telefilm Canada, the Canada Media Fund and Société de développement des entreprises culturelles (SODEC), aims to provide a more qualitative and thus in-depth understanding of how viewing decisions are made, the sources consulted to make such decisions, the impact of technologies, perceptions of the industry, etc.
- Ad hoc recherche was commissioned to conduct eight (8) focus groups with two consumer profiles (Connected/Super Consumers and Active at Home) across Canada in order to answer these questions.

Objectives

Specifically, the study had the following objectives:

- Establish an **overview** of the **viewing habits**, the **equipment** and **services** present in households and the viewing **sources** used, and then **explore the respective motivations** to use some rather than others.
- Identify and understand the **decision-making process in regard to movies**: reasons for watching, sources of awareness, criteria for a “good” movie and influences in choosing a movie, the choice process at home vs. theatre.
- Identify and understand the **decision-making process in regard to series**: reasons for watching, sources of awareness, criteria for a “good” series, factors driving interest, and then the decision to follow a series, the ways of watching a series, etc.
- Explore participant **knowledge and perceptions of the English- and French-language Canadian industries**, understand their importance in choice criteria and explore ways of encouraging people to watch more homegrown content.



Methodology

Methodology



Number of groups: Eight (8) groups

Places and dates: 22 April, Ad hoc recherche, Montréal (in French)
23 April, Chambre de commerce, Sherbrooke (in French)
28 April, Ipsos Camelford Graham, Toronto (in English)
29 April, Smartpoint Research, Vancouver (in English)

Duration: 2 hours

Moderator: Daria Balazinski, Project Director, Ad hoc recherche

Discussion guide: The discussion guide was developed by Ad hoc recherche and approved by the partners involved in the study.

Participant profile

The recruitment screener is available in Appendix I.

	Connected / Super Consumers (5:30 pm)				Active at Home (7:30 pm)			
	GR 1	GR 3	GR 5	GR 7	GR 2	GR 4	GR 6	GR 8
City and date	Montréal 22 April	Sherbrooke 23 April	Toronto 28 April	Vancouver 29 April	Montréal 22 April	Sherbrooke 23 April	Toronto 28 April	Vancouver 29 April
Viewing profile	<ul style="list-style-type: none"> Watch at least one movie AND one series a week Use 2 of the following 3 means at least once a week: a) free streaming, b) paid streaming, c) free or paid download. 				<ul style="list-style-type: none"> Use 2 of the following 3 means once every 2-3 weeks or less often: a) free streaming, b) paid streaming, c) free or paid download Watch movies at home: minimum 75% (at own home or home of relatives/friends) 			
Socio-demographic profile	<ul style="list-style-type: none"> Men and women aged 25-44 In Quebec: watching at least 50% of content in French A portion with children under 18 at home (no quotas) Exclusion of people unemployed or working in related fields No participation in a focus group in the previous 6 months 				<ul style="list-style-type: none"> Men and women aged 25- 59 (50% aged 25-44 and 50% aged 45-59) 			

Discussion agenda



See the discussion guide in Appendix I.



Given the qualitative nature of this study, the results obtained **cannot be statistically generalized** to the entire target population. However, the **convergence** of opinions on a number of subjects allows us to identify major **trends** in several areas.

Unless otherwise indicated, the findings reported in this report are based on the **eight (8) focus groups** as a whole.



In Montréal (first 2 groups), the subject of English-language Canadian and Quebec content was addressed only at the end of the discussion. In the 6 other groups, it was introduced earlier in order to touch on it when the movies and series were shown and ultimately come back to it at the end to prompt ideas.

1 Introduction and participant introduction (15 min.)

2 Viewing habits and the role of technologies (25 min.)

- Waiting-room questionnaire: screens, services and top 3 sources of film/series content

3 English-language and French-language Canadian content (15 min.)

- Spontaneous perceptions
- Ease of recognizing content origin
- Importance in the choice of content

4 Influences in the choice of movies and series (60 min.)

- Motivations for watching a movie, a series
- Sources of awareness
- Definition of a “good” movie / a “good” series
- Movies: choice criteria, at-home vs. movie-going decision-making process, awareness of English- and French-language Canadian movies
- Series: motivations for trying and then following a series, ways of following

5 Incentives for the English- and French-language industries (10 min.)

- Montréal and Sherbrooke: spontaneous suggestions
- Toronto and Vancouver: brainstorming in teams of 2

Homework and waiting-room questionnaire

1

Before coming to the group, participants had to record all the movies and series they watched over the course of a week in a viewing diary.

→ An analysis of the homework appears in **Appendix II** and generally reflects the content of the discussions.

FILMS AND TV SERIES/SOAP OPERAS WATCHING GRID

Day and date	Type	Title	Location	Time of day	No. of people present	Language	Platform	Source
1	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
2	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
3	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
4	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
5	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
6	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
7	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
8	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
9	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
10	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
11	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other
12	<input type="checkbox"/> Film <input type="checkbox"/> Series		<input type="checkbox"/> Home <input type="checkbox"/> Theater <input type="checkbox"/> Elsewhere	<input type="checkbox"/> AM (8 to noon) <input type="checkbox"/> PM (noon to 6) <input type="checkbox"/> Evening (6PM to 6AM)		<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other	<input type="checkbox"/> TV <input type="checkbox"/> Computer <input type="checkbox"/> Tablet <input type="checkbox"/> Phone	<input type="checkbox"/> Live* <input type="checkbox"/> Recorded <input type="checkbox"/> DVD <input type="checkbox"/> Netflix/ones <input type="checkbox"/> Video on demand <input type="checkbox"/> Other

Note: If you watch more than one episode of the same series on the same day, please just count it once. In doubt, simply add details in the margins.
* Live means you are watching a movie or TV series episode that is playing at that moment on TV, for example on CBC, CTV, NBC, Fox, etc.

2

In the waiting room, participants also completed a questionnaire on the equipment, services and sources used in their households, which served to get the discussion started.

Waiting Room Questionnaire

Today, we have access to a variety of equipment and sources when watching movies and TV series. Please indicate the devices and services that you have in your household.

1. The = screens = in your household

	Check if YES	How many?
a) Flat screen/HDTV television	<input type="checkbox"/>	
b) Smart TV	<input type="checkbox"/>	
c) Traditional TV (tube, not flat)	<input type="checkbox"/>	
d) Computer or laptop	<input type="checkbox"/>	
e) Tablet (iPad, Samsung, Asus, etc.)	<input type="checkbox"/>	
f) Smartphone	<input type="checkbox"/>	

2. The = services = in your household

	Check if YES	Please specify which.
a) Cable/paid TV service (cable, fibre or satellite)	<input type="checkbox"/>	
b) Receiver/PVR	<input type="checkbox"/>	
c) Subscription to Netflix or other paid streaming	<input type="checkbox"/>	
d) Xbox (or other game consoles)	<input type="checkbox"/>	
e) Players such as Roku, Apple TV, others	<input type="checkbox"/>	
f) Any other equipment or services (please specify)	<input type="checkbox"/>	

3. Viewing sources for movies and TV series

Please check off the sources or viewing modes used in your household.

	A. Past month	B. Past year
Live on TV	<input type="checkbox"/>	<input type="checkbox"/>
Specialized channels (The Movie Network, Movies, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Video on demand (ex. through cable/satellite receiver/PVR or on an on-demand channel)	<input type="checkbox"/>	<input type="checkbox"/>
Recorded on your Personal Video Recorder (PVR)	<input type="checkbox"/>	<input type="checkbox"/>
Paid streaming (i.e. Magsaloo, Sizzle)	<input type="checkbox"/>	<input type="checkbox"/>
Free streaming (i.e. iTunes, Amazon)	<input type="checkbox"/>	<input type="checkbox"/>
Paid downloads (i.e. iTunes, Amazon)	<input type="checkbox"/>	<input type="checkbox"/>
Free downloads (i.e. torrent sites)	<input type="checkbox"/>	<input type="checkbox"/>
Rental in a video store	<input type="checkbox"/>	<input type="checkbox"/>
DVD / Blu-Ray that you own	<input type="checkbox"/>	<input type="checkbox"/>

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Highlights and conclusions

Highlights and conclusions

Viewing habits

Watching movies and series is an entertaining and growing pastime for the majority, facilitated by availability from multiple sources on multiple platforms and by a profusion of series

- This study makes clear that new technologies are changing consumer habits and increasing content accessibility: a majority of participants reported watching **more movies and series than two years previous** (even though some remained unchanged). Today, it is much easier to watch a movie you like when you want, on the screen you prefer, at the place you choose. For the vast majority, having to plan a visit to the video store in cold or rainy weather and being obliged to return the borrowed content the next day is a thing of the past.
- The shift stems from the availability of content on diverse sources and the **regular use** of sources **other than live TV**, including the personal video recorder (PVR), free download, paid or free streaming and VOD. This use clearly illustrates the **movement toward immediacy** observed among the consumers consulted (and a desire to avoid ads as much as possible).
 - The **paid streaming** phenomenon (Netflix) **is almost ubiquitous** in Toronto and Vancouver, and is making major inroads in Quebec households (notably with Club Illico) – reflecting the appeal of a **subscription model** (unlimited use at an affordable flat rate) as opposed to a one-at-a-time or “with ads” model. Even though first-run titles are not included (with the exception of such series as *House of Cards*), the vast majority feel there is enough variety since they use other sources at the same time.
- In addition, the **platforms** used to view content are also proliferating. While the **television screen** is still the **main screen**, because of size, comfort and image and sound quality, it is now **fed by a multitude of devices**, foremost the laptop, that provide direct access to diverse sources of download or streamed (legally or otherwise) content .
 - Furthermore, the prevalence of other screens (computers, tablets, even smartphones) allows consumers to personalize viewing at the time and place of their convenience (in bed, at school, on break). It is not uncommon for two people in the same room to be watching different content from different sources.



Highlights and conclusions

MOVIES | Motivations and decision-making process



Entertainment and relaxation are the fundamental reasons for watching a movie

- Across each of the eight groups, the fundamental reason given for watching a movie is to be **entertained and relax**. It serves to unwind after a week of work, or once the kids are in bed. For some, it is a way to pass the time – sometimes even to fall asleep! **Only exceptionally do people watch a movie to learn something or because they are fans of a director, for example.**

The level of involvement in a movie is relatively low

- One might expect watching a movie to be a big family happening or a social event with friends. This is the case with some major productions in first release but, as a general rule, **the majority of participants watch a movie as one among many others** available at the time.
- Furthermore, a movie **does not generate the same level of involvement as a series**, since it represents a single viewing occasion with a well-defined duration. Nor can it be easily watched in 45-minute “bites” like a series and is thus not an ideal choice when time is short.
- For this reason, some people prefer to watch movies only on weekends, when they have more free time – and in that case the occasion can become more social or engaging.

Plots, yes, but not too cerebral, please

- In a context where viewing serves to entertain and relax and where the level of involvement is generally quite low, people **like movies that are not overly cerebral**. This does not mean that they should be devoid of plot (people don’t like movies whose outcome can be guessed at the start), but there is a threshold which, if crossed, rapidly makes the movie a niche product more suited for seasoned movie buffs than for ordinary consumers.

Movies are watched mainly at home

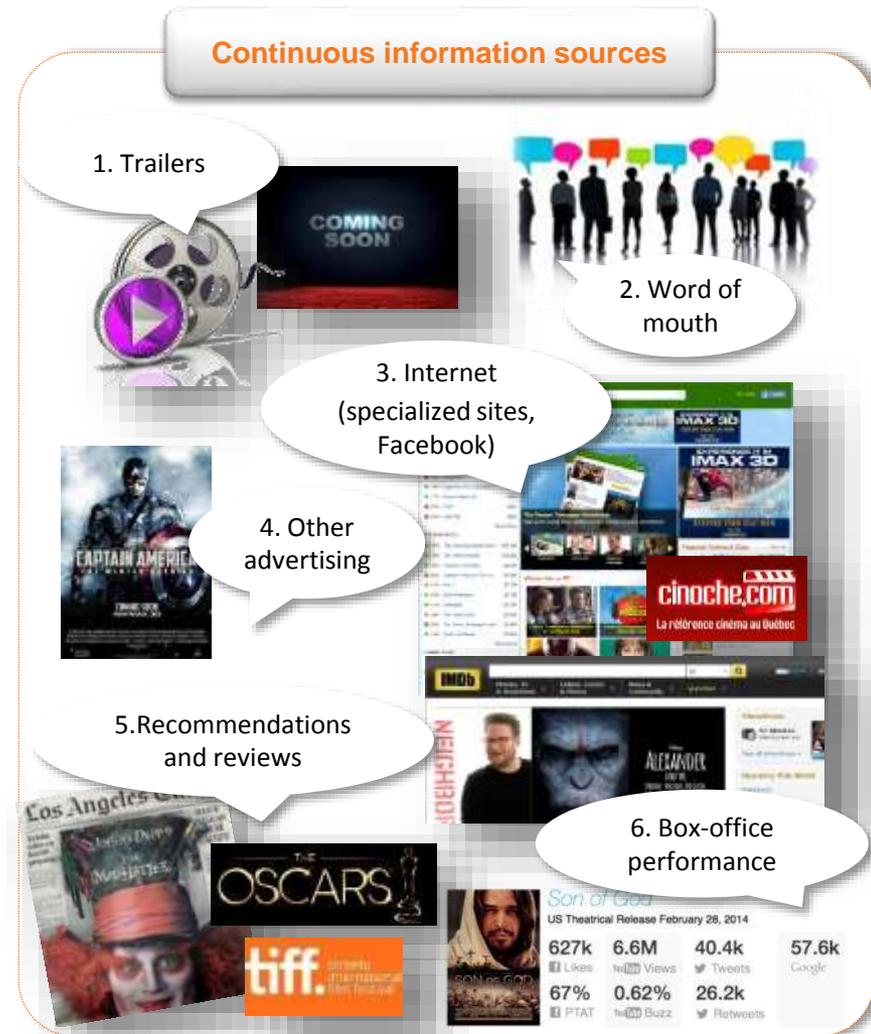
- Across all groups, excepting two or three movie lovers in each one, **almost all movies** are **watched at home**, and occasionally while in transit/traveling. So many movies are released at different times of the year that it becomes impossible for the consumer to keep up. Consequently, there is always a good choice to be had from the various sources available at home.

Highlights and conclusions

MOVIES | Motivations and decision-making process (cont.)

The decision-making process as a whole is far from linear

- If there is one thing to keep in mind, it is that **choosing a movie is not done in a rigorous or systematic way**. Consumers consider multiple criteria, of course, but the process unfolds over time and is not strictly linear.
- Most consumers gradually and almost unconsciously **gather information** about movies (and series) from diverse sources of awareness (they have seen the trailer, they like the actors, the movie has enjoyed a certain buzz, the story seems interesting, the movie played in theatres for some time and they heard about it from friends who had seen it, they read reviews on rottentomatoes, IMDb, etc.).
The **sources of awareness** of a movie are illustrated at right and numbered in order of importance.
 - **Movie trailers** were mentioned by the **vast majority** and are a **crucial vehicle** not only of **awareness** but of **influence** on future choices. A good trailer provides an accurate foretaste of the movie (without revealing too much) and prompts people to mentally file it under “to see.” **If a producer has just one means to promote a movie – or, at least, if there is one promotional tool on which he or she should not skimp – the trailer should be the priority.**
- When it comes **time to choose** a movie to see either at home or at a theatre, most people already have the basic **information in mind**.
 - Additional information then helps to finalize the decision.



Highlights and conclusions

MOVIES | Motivations and decision-making process (cont.)

Mood and genre – in short, immediate desire – are the main choice factors

- By and large, it is mood (and thus **genre**) that heavily influences spur-of-the-moment choice. Wanting “a good action film” or “a good comedy” pretty much defines the range of movies apt to be seen. Canadians consider their mood first in choosing a movie and, in this sense, comedies and action films lead the field when the primary goal is entertainment and relaxation.
 - **Mood and genre are not static.** The person looking for a comedy one day may be looking for an action film the next day. People may prefer a genre but rarely choose it exclusively: a behaviour observed across the country.

Key success factors once mood is determined

- The other **criteria** are based on the image of **the film’s quality** (“good movie” or not) perceived through **various indicators** (list at right). Taking that into account, the chart below attempts to present the **key success factors** for a movie to be chosen.

Level of buzz

- A “**good movie**” naturally will have generated various forms of buzz, and since viewing is done mainly at home, most people will have an idea, if only vague, of whether it is “good” or not as a result of hearing about it.
- Buzz raises awareness of a movie but does not guarantee that it will suit personal tastes.

Perceived quality of the movie (“good movie”)

A “good movie” continues to build on the initial buzz by means of its quality (i.e., delivers what the genre promises):

a) Emotion / experience:

- **Arouses an emotion:** a comedy to laugh, a drama to cry, a horror movie to feel fear
- **Provides an experience:** entertains / takes the mind elsewhere / completely absorbs (in the world, in the story)
 - › Aided by the **visual aspect**:
 - Impressive special effects
 - Aesthetics/beauty, images/landscapes

b) Actors/directors

- **Actors** who bring the script to life
- Known/liked **actors** (very important)
- Respected or liked **directors** (more secondary)

c) Story /script

- Delivers an **interesting, convincing story**, well paced and ideally **not at all or only slightly predictable**.

Key choice criteria

Main criteria

- **Mood /genre**
- Actors
- Trailers

Multiple mentions

- With whom watching
- Reviews, ratings, rankings, box-office performance
- Subject/story
- Recommendations (word of mouth)
- Nominations, awards
- Director/production quality or budget

Availability on sources

- **Availability on sources** underlies the choice process: content **available** or **featured** on a source will be considered (for download, streaming, VOD, PVR, DVD, etc.).
- Specifically, **fairly simple, visual classification** (for example, New Releases on VOD and Recommended for You on Netflix) attracts attention and is often **consulted first**.

Highlights and conclusions

MOVIES | Motivations and decision-making process (cont.)

Choosing for home: sometimes simple but can be long

- Despite the relatively low involvement related to watching a movie, the proliferation of sources and content **also lengthens the process**, due to the numerous options that often have to be considered to reach a decision. This can be a source of frustration, with some people spending 30 minutes and even up to two hours to make a choice. Conversely, the choice may be made quickly by flipping a coin.
- Some participants organize **more official, social** movie nights **with** family or a few friends or roommates. These occasions are planned the same day or sometimes for the coming weekend.
- When a movie is to be watched in a group, the strategies vary for counting each person's vote or making a preselection to speed up the process (by proposing 3 or 4 choices) – or, in some cases, a suggestion made by one person.



More powerful filtering or recommendations algorithms

Given the quantity of available choices, the Connected participants in Vancouver suggest more advanced search filters to target their mood and criteria.

Netflix recommendations are one of the easy ways to discover new movies. Still, there seems to be an opportunity to further develop these features.

At-home choice process

1 Available on my sources

- Live TV channels
- PVR
- VOD
- Netflix
- Streaming sites
- Previously downloaded content
- Owned DVDs
- Video club

One or two main sources generally used

2 Weigh the options

Can be time-consuming

Main criterion: my mood

Information sources

What I already know (may have something in mind)

Criteria

Actors/subject
With whom watching

+

Information sources

Trailer
Synopsis
Images

+ more personal criteria

3 Make a choice

Sometimes a preselection to suggest

Highlights and conclusions

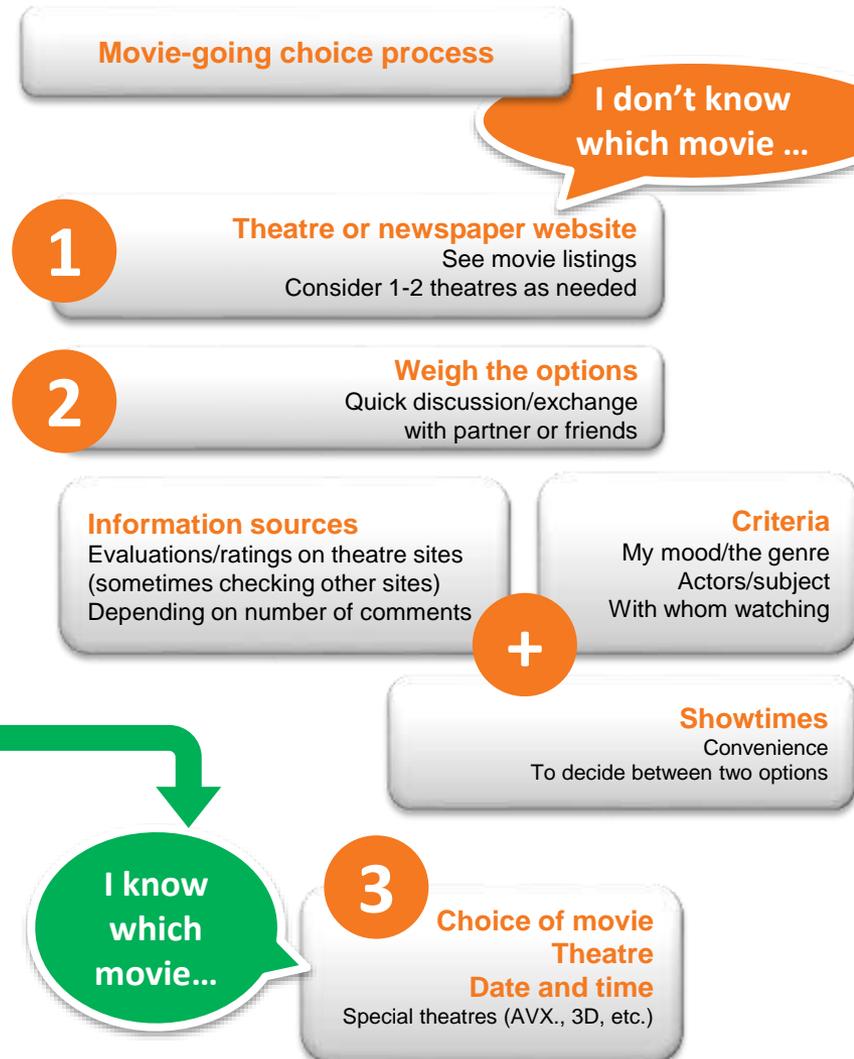
MOVIES | Motivations and decision-making process (cont.)

Movie-going: a costly event

- Due to the trend toward viewing at home, movie outings are **rarer or less easily justifiable**, occurring on average **once a month to once every three months**.
 - The perceived high **cost of a movie outing** seems to be the main obstacle – although many people thoroughly enjoy the experience.
- **Going to the movies** is generally perceived as **an outing or an experience**, often social and shared with friends or children – to get out of the house, escape the routine, or to make it a big event.
- For theatre-going, consumers **favour** movies whose **visual or special effects** will be enhanced by the **big screen** and **superior sound experience**. **Action films** seem to be particularly well suited, but other movies or genres can lend themselves to theatre outings, depending on individual preferences and the desired experience (drama, comedy, etc.).

The choice of movie is often known in advance

- In **most cases, the participants know which movie they want to see at a theatre**. As they hear about movies coming out, the majority mentally identify those they would like to see there. In other cases, **the movie is chosen once the decision to go to a theatre is made** (see diagram at right).
- Whatever the case, the **decision to go see a movie** at a theatre is generally made **quite spontaneously** and the outing follows the decision fairly quickly.



The vast majority expect to still be going to the movies in 5 years. Movie-going remains an experience: theatres provide a technology not available at home and equipment adapted to showcase advances in film production.

Highlights and conclusions

SERIES | Motivations and decision-making process

Series: driving content consumption

- In most cases, it is mainly **series** that play a **more important role** in viewer habits (especially in Vancouver and Toronto), with growth encouraged by the **explosion of variety and quantity** of series and the almost instant **availability** from different sources and of entire series.

Reasons for watching or following a series

- Plot/subject, suspense
- Script quality/intelligence
- Characters and their development
- Relaxation
- Diving into another world (realistic or fantasy)
- Social aspect/conversation
- Actors
- Look/visual style, atmosphere

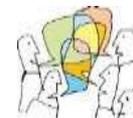
An engaging and social phenomenon

- Like movies, series fulfill people's **need to be entertained**, to **unwind** after a day's work and **dive into another world**, no matter whether close to or far from reality, funny or dramatic, provided it takes them elsewhere.
- But beyond that, the **primary mechanism of series** is the ability to **maintain suspense** from one episode to the next with the plot: viewers are always left wanting more or with a punch, which generates **involvement** and **conversation** and serves as a **barometer of success**. However, the plot should not be limited to this purpose or deviate from credible character development – otherwise viewers may tune out.
 - This is particularly true of long-arc series (where the plot develops over the full series) vs. episodic series (each episode is self-contained), which are just as engaging but more relaxing, a sure way to unwind after work.
- A **first episode or two** that manages to hook the viewer with at least one (and ideally several) of these elements leads to following the series. In addition, the availability of entire seasons (current or past) allows people to binge-view and get involved in the story more quickly and deeply.

Discovering a series is mainly the result of word of mouth

- Given the **engaging and social nature of** series, it is no surprise that **word of mouth** is the main way people hear about series – from friends, colleagues or even on the street!
- **TV spots** are also a fairly common means to raise awareness, showing key moments to capture attention and make people want to watch the series or episode.
- Other ways of discovering a series include online **reviews and recommendations** and **availability** on a given source.

Some people reported **actively looking for** their next series. This involves asking friends and searching online or traditional sources (reviews, articles) to find the next “hook.”



Highlights and conclusions

SERIES | Motivations and decision-making process (cont.)

Series are very flexible in ways of watching

Binge-viewing is very popular, but others prefer moderation

- **No one way of following.** It is rare for viewers to follow series in a consistent way (binge vs. live). Most consumers consulted follow series at times live, at times by bingeing and at times in delayed mode. However, watching live is the least common for the majority and many fall back on PVR. In fact, the study has brought to light a **new behaviour, delayed live viewing**, which consists of tuning in fifteen minutes after an episode starts in order to avoid ads.
 - **Binge-viewing** is clearly widespread and encouraged by the proliferation of sources and series – and by ad-free models (Netflix, PVR, etc.). It is more common when entire seasons are available but can also involve accumulating series on PVR.
- Others are more **restrained** in their consumption, watching one episode at a time, either because they are following a current season (live or delayed) or as a ritual with others, or sometimes due to lack of time or fatigue.

Watching alone or with others

- The series phenomenon generates conversation, **but a series also can be watched solo** and discussed later, especially when tastes differ or the theme is less suitable for children – or depending on time of viewing. However, some participants reported watching certain series with friends, as a couple or with family (notably *Game of Thrones*), or occasionally binge-viewing with a group of friends.

Different platforms and screens

- **Viewing platforms** can vary, depending on equipment and habits and also on where the series is available. Series do not absolutely require a television screen to do them justice and they lend themselves to **smaller screens**, especially for solo or brief watching.
 - **Laptops** and even more so **tablets** easily serve as screens for series, whether on a couch with someone else or in bed (repeatedly mentioned in the groups). Tablets, in particular, are easy to carry around and provide a screen that is large enough but not as absorbing as a big television screen.
 - **Smartphones** can be used to watch an episode between two courses or at lunchtime, for example.

Series: movies' biggest competitor

- As the groups progressed, it became clear that series have become the biggest competitor of movies in recent years. They are numerous, they are high-quality, they are delivered in easily consumable episodes and they establish an almost intimate relationship with the viewer. In a context of limited free time, series are stealing viewing time from movies.

Highlights and conclusions

Perceptions of Canada's English- and French-language industries



Note: In Toronto and Vancouver, the Quebec productions were neither introduced or addressed in the discussion, unless spontaneously mentioned.

The study confirms that the French-language industry fares better than the English-language industry in terms of awareness and image – but both would benefit from greater promotional efforts

The lack of awareness of English-language Canadian movies is flagrant

- In Quebec, almost all of the people consulted were incapable of naming an English-language Canadian movie and the situation was similar in Toronto and Vancouver. Other than recognizable surroundings (e.g., CN Tower) or well-known names, English-language Canadian movies contain **no easy clues** to their origin.
 - The movies presented as examples in the groups (see page 61) are relatively well known, but not as Canadian movies. Seeing these examples planted a more positive image in the participants' minds.
- Besides a perception of **low budgets** and **poor production quality**, the English-language industry is burdened with a mainly conservative, boring, rural, slow, old-fashioned, very clichéd image – the exact opposite of the wave of intensity and innovation felt in American productions.

In contrast, French-language Canadian movies fare relatively well

- The participants in both the Montréal and Sherbrooke groups easily named several French-language movies from Quebec, owing in particular to good media coverage of certain productions during the past two years. Furthermore, most agreed that Quebec movies are increasingly available and that the quality is improving.
 - The advantage of a Quebec movie is that it is **much easier to identify**, with the **actors** and the **language** (accent, Quebec expressions) as the primary clues but also a typically local approach/humour..

French-language Quebec series: quite well known

- Most **Montréal and Sherbrooke** participants **follow one or more Quebec series** and were thus much more familiar with the offer, naming a wide range of series in the discussions.
- Generally, they perceive **a certain upswing in the variety and quality of Quebec series** in recent years (especially compared to English-language Canadian series): **the offer is improving**, reflects local culture and can accommodate different tastes, shows different worlds (prison setting, hospital setting, comedies, dramas, old-couple series, etc.).

English-language Canadian series: poorly followed

- Among the Toronto and Vancouver participants, **awareness of English-language Canadian series** was **relatively good** but not across the board. Most spontaneously named several series, but some of the titles are from years or even decades ago. Nonetheless, the **majority** claimed to **know all of the English-language series given as examples** in the groups.

Highlights and conclusions

Perceptions of Canada's English- and French-language industries (cont.)

To develop the industry, improve production awareness, variety and quality

- The vast majority of movie lovers consulted agreed that **multiple keys to success must be put in place to bring the industry up to international standards**. Industry development is desirable, since everyone is looking for good content, but that content will be judged in the same way as the best of the existing offer – especially for English-speaking Canada.
- The discussions generated several ideas on how to **encourage** the consumption of **homegrown content**:
 - **Establish a strong media presence to increase awareness and appeal**: trailers, TV spots, billboards, online and social media presence, theatre, radio and newspaper presence (particularly in English-language Canadian media vehicles), viral promotions, etc.
 - › Promote a **general message about the industry**: emphasize variety, current renewal (PR)
 - › Include **discovery incentives**: free screenings or tickets, free ticket contests, bonus points (e.g., triple points) at Cineplex to see a new movie
 - › Consider **cross-promotions** or marketing with Canadian companies (Second Cup, posters or Telus, to promote content to customers)
 - › Promote **within other programs** (e.g., *The Big Bang Theory* characters discuss the shows they watch)
 - › Ensure **availability in theatres, on VOD**: good turnover of different titles on television (without repeating the same movies)
 - › Highlight or seek **international recognition**: awards and nominations, ratings and reviews, presence on websites and ratings
 - › Establish or promote **festivals** devoted to English- and/or French-language Canadian content (and to exchanges between the two industries)
 - **Improve production quality**: higher production standards, more grants/funds to support the industry, skilled use of creativity, more original/captivating stories/plots, better acting (invest in actor training, more money to keep Canadian artists in Canada) and well-known names (especially in **English-language Canadian films/series**).
 - **Expand the variety of the offer**: more variety and genres, more mass-audience productions (vs. auteur, niche or “thought-provoking” films) and universally appealing subjects.
 - **Promote well-known names** (especially in **English-language Canadian films/series**).
 - **Educate** the public as to what constitutes a **Canadian production**, communicate the benefits of supporting the industry or of trying Canadian content.



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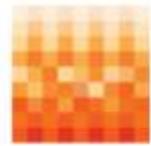
**Canada
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Québec



Detailed results



Detailed results

1

Viewing habits and sources used

Viewing habits



* The figures below are presented for information only.

Movies and series remain an important pastime

- For a majority of the people consulted, **watching a movie or a series** is one of their **main free-time activities**.
- On average, the **hours** spent watching movies and series range from **5 to 25** a week (the participant recruiting criteria included watching one movie and one series at least once a week), as a general rule.
 - Several participants in each Connected/Super Consumers group rank toward the top of this range (resulting in an average of 19 hours a week).
 - The majority of the Active at Home participants reported slightly fewer hours.
 - It depends on personal habits, and a few people in both profiles devote 30 or even 50 hours to viewing.

19 hours*

Connected/
Super Consumers

14 hours*

Active at Home

Habits are dictated in part by the day of the week

- The **majority** of the participants consulted **divide** their viewing more or less equally between **weekdays** and the weekend. For many, the **day/time** often determines the type of viewing.
 - **Weekend** (including Friday evening)
 - › For a good many, the time to watch movies or to binge-view (especially Sunday) due to increased discretionary time
 - › For some, the time to do something else (family activity or outings).
 - **Weekdays**
 - › Devoted more to series in the evening, whether live, recorded or by another means
 - › Less common for some because they are busy during the week

*“La fin de semaine, s’il ne fait pas beau dehors.” –
Montreal,
Connected/Superviewer*

*“La fin de semaine, on écoute moins...on va sortir et faire autre chose.” –
Montreal,
Connected/Superviewer*

Impact of the homework

- The majority was **relatively conscious of their habits**, but the homework that consisted of writing down a week of movie and series watching before the groups met served to highlight several things:
 - The real number of hours spent watching content (for some, more than they thought)
 - The regularity of certain habits or series (in Toronto and Sherbrooke)
 - Series cycles ending at certain times of the year

*“On weekends I watch movies more than series, chill with friends.” –
Toronto,
Connected/Superviewer*

Viewing habits

Seasons and weather also influence viewing habits

- The **seasons** affect **series cycles** that begin or restart in fall or spring. Interestingly, some people watch more movies during series hiatuses. But with the other sources available and entire series to discover, this phenomenon does not apply to all participants.
- Many said that their **viewing hours drop by half** during the summer. Summer brings a variety of activities and most seem to want to take advantage of the nice weather. This aspect is very marked in Vancouver and extends to nice weather at any time of year.
 - However, some noted that summer also brings blockbusters to theatres.
- Winter and cold or unpleasant temperatures encourage people to stay inside and watch content.



“L’été il sort plus de films et je trouve invitant d’aller au cinéma.” – Montreal, Connected/Superviewer

Montréal is relatively bilingual whereas Sherbrooke is focused on French content

- In **Montréal**, viewing habits are more or less shared in terms of language. The majority of participants watch a mixture of content in French and in English. Only a few favour French.
- In **Sherbrooke**, the **omnipresence of French is undeniable**: the vast majority of people consulted watch **only content in French** (but not necessarily Quebec-made).

“Dans le confort de mon foyer, l’hiver, j’écoute des films. Au lieu de prendre une marche, je reste chez nous et j’écoute mon film.” – Montreal, Connected/Superviewer

Vancouver emerges as the most “connected” market, Sherbrooke less sophisticated

- Overall, the **Montréal, Vancouver and Toronto markets are similar** in regard to the level of participant sophistication: all are relatively engaged with their content and use a variety of content and information sources.
- **However, the Vancouver participants demonstrate a hyper-connected profile**: download and streaming are ingrained in everyone’s habits. The common term for download is no longer “download” but “torrent” – which seems to have become a verb in the same way as Google (“I torrent or stream it.”).
- Overall, in Sherbrooke, the approach to content consumption seems more traditional, reflecting the participants’ slightly **lower** level of engagement (video club rentals are still common), but it is still in line with the major trends observed in the groups.



Viewing habits

Equipment and services in household



The results in the graphs below are presented for information only.

The television screen is the preferred screen at home

- The traditional television screen is the one used most often (and by far) for viewing, for several reasons:
 - Large screen size (main reason)
 - Image quality
 - Sound quality and sound system
 - Comfort of the room with the TV (settling in comfortably on the couch)
 - Ease of watching in groups
- However, it is now fed by a multitude of devices, foremost the laptop, that provide direct access to diverse sources of download or streamed (legally or otherwise) content .

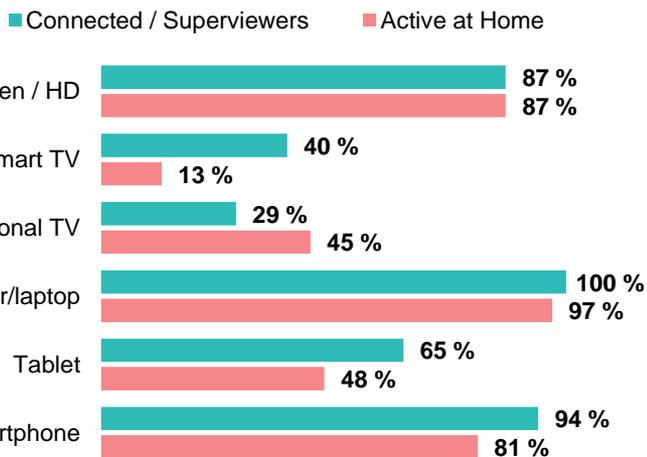


“The computer is hooked up to [the TV screen], it’s where the family gathers.” – Toronto, Connected/Superviewer



*This is clearly a **new behaviour**, compared to previous studies conducted by Ad hoc for other clients in the audiovisual content industry.*

Screens in household*



Another screen is used when the main screen is in use, most often by children watching their content or using the game console, or by other people watching programs that don’t interest the participant. Otherwise:

- To watch what one wants or shows that no one else watches
- To access downloads or certain websites more easily (if they are stored on a computer not connected to the main screen)
- To access the nearest or most practical screen (a tablet in bed, for example)
- To watch on a screen smaller and thus quieter than the TV screen
- While in transit/traveling or camping; at school or work (often a smartphone)

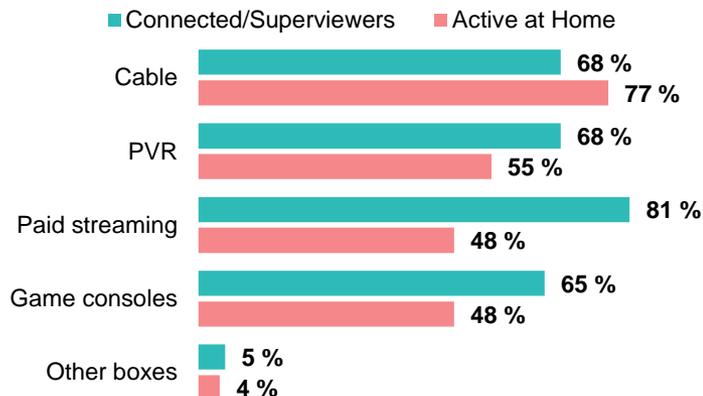
Viewing habits

Equipment and sources used

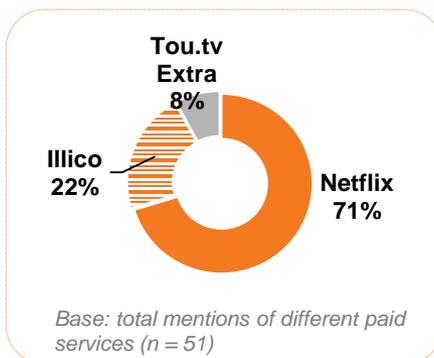
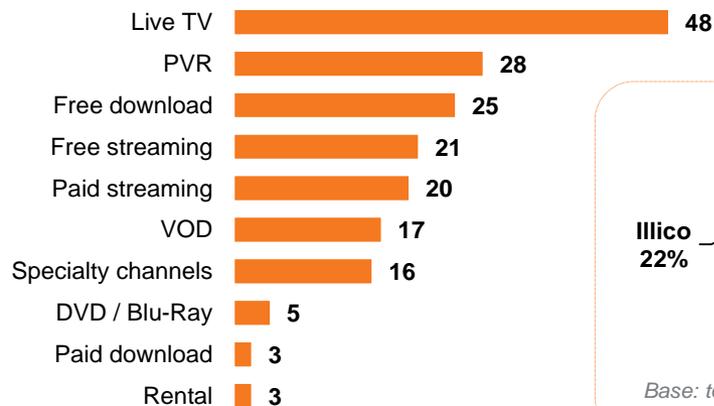


The results in the graphs below are presented for information only.

Services used



Top 3 sources used



The groups confirm it: sources are being democratized

- The **PVR** is now in a large majority of households and its use is increasingly integrated into viewing habits.
- **Streaming and download**, whether paid or free, are used in almost all households. However, paid download is much less frequent.
- VOD is used frequently, even though considered costly compared to new options like Netflix and Club Illico.
- Although a minority, there are still nostalgic fans of the good old DVD, which they like to own or rent or buy at the video store for a good price.

The immediacy phenomenon

- **Live TV** is still a main source (less in Vancouver, where it ranks 3rd) but does not always involve active or engaged viewing.
- Furthermore, the behaviours reported tend toward **instant access** at the exact moment the user wants. Paid or free streaming effectively fulfills the need for immediacy. Many people even use PVR for delayed live viewing, meaning they tune in 20 minutes or so after a program starts in order to avoid ads.

Paid streaming, very popular

- **Netflix is almost ubiquitous** in Toronto and Vancouver, and is making major inroads in Quebec households. However, unilingual French speakers in Sherbrooke (and to a lesser extent in Montréal) are more inclined toward Club Illico for its offer of French content.
 - Vancouver participants also use IP blockers to access US and even UK Netflix.

Viewing habits

Evolution of habits

Upsurge in viewing helped by accessibility of offer from various sources

- The **majority** reported that they had **watched more movies or series** during the previous two years.
 - The **minority**, who watched **as many** or **fewer**, cited abandoned behaviours (recording) or important life changes (birth of a child, new job, studies, etc.) that of course significantly reduced their available time.
- **The availability of content** explains this increase:
 - Diverse platforms and technologies
 - › Availability of streaming
 - › Possibility of watching on a tablet, a laptop or a smartphone (at night, in bed)
 - › Availability of PVR
 - Availability of series (further detailed on pages 57-59)
 - › Availability on Netflix or Tou.tv (Quebec): instant access when and with the number of episodes desired
 - › Availability of American series dubbed in French;
 - › Boom in English-language series (in quantity and quality, as detailed on pages 54-55).

*“Depuis que j’ai découvert le streaming gratuit, j’en écoute bien plus.”
– Montreal, Connected/Superviewer*

“À cause de mon cellulaire, ça fait 2 ans que je l’ai - avant d’aller me coucher, j’écoute une moitié de film sur mon cellulaire.” – Montreal, Connected/Superviewer

*“Le fait que l’on peut les enregistrer et les passer quand on veut [les séries].”
– Montreal, Connected/Superviewer*

“L’explosion des séries – il y en a de tous les genres...” – Montreal, Active-at-home

“It’s easier to get stuff. A friend gives me all of her stuff, so I don’t need to download. I started watching series I would not have started watching otherwise.” – Vancouver, Active-at-home



Viewing habits

Proportion of movies and series

 The results in the graphs below are presented for information only.

Series: driving content consumption

- The portion of time devoted to **films and series among all content watched** varies enormously, representing from **95% to 50%** of total content watching. Some men, in particular, spend more time on sports, and other participants, on specialized content or news.
 - Several reported that their movie or series viewing is relatively active, while other types of content become background noise.
- Series take up more and more viewing time** for a majority of participants and are one of the factors in the increase in viewing hours. This phenomenon is on the rise owing to the variety and growing availability of high-quality, leading-edge series. But some people are still chiefly movie consumers.

"Avant j'écoutais moins les séries, parce qu'une série lundi, mardi, mercredi, ça me fatigue, mais maintenant avec Netflix, je peux l'avoir plus rapidement." – Mtl C/SC

A larger portion of time is occupied by series in the English-speaking Toronto and Vancouver markets and the bilingual Montréal market compared to the Sherbrooke market. The greater availability and variety of series in English clearly boosts this trend.

Films vs. series | Overall average



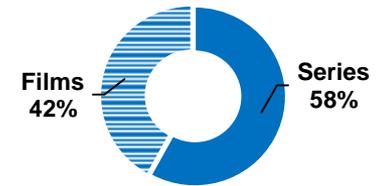
Connected/Super Consumers



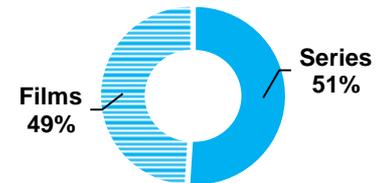
Active at Home



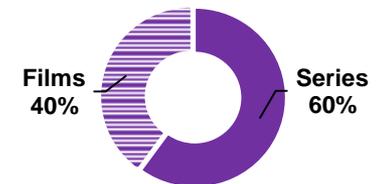
Montréal



Sherbrooke



Toronto



Vancouver



Viewing habits

Sources used | Detailed table



The results in the table below are presented for information only.

- This table presents the prioritization of sources overall and by group profile. As expected based on the criteria, it shows the greater importance attached to speciality channels and video on demand by the Active at Home profiles vs. the preponderance of streaming, download and PVR use by the Connected/Superviewers. Significantly, in both target groups, **live TV remains by far the main source used despite pressure from a multitude of other means.**

	Total				Superviewers				Active at Home			
	Top 3 sources			TOTAL	Top 3 sources			TOTAL	Top 3 sources			TOTAL
	1	2	3		1	2	3		1	2	3	
Live TV	18	17	13	48	8	8	4	20	10	9	9	28
Recorded on personal video recorder (PVR)	12	9	7	28	6	4	3	13	3	2	4	9
Free download (e.g., torrent sites)	8	7	10	25	3	3	7	13	5	4	3	12
Free streaming (e.g., Tou.tv, Megavideo, SideReel)	8	6	7	21	5	3	6	14	3	3	1	7
Paid streaming, one at a time or subscription (e.g., Netflix, Illico)	9	8	3	20	7	6	0	13	2	2	3	7
Video on demand or Pay-per-view (e.g., Fibe, Illico)	4	5	8	17	1	3	4	8	3	2	4	9
Specialty channels (e.g., Super Écran, The Movie Network)	3	9	4	16	1	4	2	7	2	5	2	9
Owned DVD / Blu-Ray / VHS	0	1	4	5	0	0	1	1	0	1	3	4
Paid download (e.g., iTunes, Amazon)	0	0	3	3	0	0	3	3	0	0	0	0
Video club rental	0	0	3	3	0	0	1	1	0	0	2	2

Viewing habits

Sources used | Table by city

 The results in the table below are presented for information only.

- This table presents the prioritization of sources by city and illustrates the heavy PVR use across the groups, as well as the variance for Sherbrooke in terms of streaming and less frequent download in Toronto.

	TOTAL	Montreal				Sherbrooke				Toronto				Vancouver			
		Top 3 sources			TOTAL												
		1	2	3		1	2	3		1	2	3		1	2	3	
Live TV	48	3	3	6	12	10	3	2	15	4	7	2	13	1	4	3	8
Recorded on personal video recorder (PVR)	28	2	2	1	5	0	5	2	7	5	1	1	7	5	1	3	9
Free download (e.g., torrent sites)	25	2	4	2	8	1	1	1	3	0	0	2	2	5	2	5	12
Free streaming (e.g., Tou.tv, Megavideo, SideReel)	21	2	3	2	7	1	0	2	3	2	2	2	6	3	1	1	5
Paid streaming, one at a time or subscription (e.g., Netflix, Illico)	20	5	1	0	6	0	0	0	0	3	1	3	7	1	6	0	7
Video on demand or Pay-per-view (e.g., Fibe, Illico)	17	2	0	2	4	2	3	4	9	0	1	1	2	0	1	1	2
Specialty channels (e.g., Super Écran, The Movie Network)	16	0	3	0	3	2	4	2	8	0	2	2	4	1	0	0	1
Owned DVD / Blu-Ray / VHS	5	0	0	1	1	0	0	1	1	0	0	1	1	0	1	1	2
Paid download (e.g., iTunes, Amazon)	3	0	0	0	0	0	0	1	1	0	0	0	0	0	0	2	2
Video club rental	3	0	0	2	2	0	0	1	1	0	0	0	0	0	0	0	0

Viewing habits

Sources used | Table by city

Platforms combining accessibility and “good prices” are favoured for their ease of use

- A **subscription model** like Netflix or Tou.tv Extra, i.e., an unlimited-use platform offered at an affordable flat rate, remains **very attractive** for the majority. Even though first-run titles are not included, the vast majority feel there is enough variety since they use other sources at the same time.
 - Some prefer an official platform because of the disadvantage of countless pop-ups and potential viruses on free streaming or download sites.
- Not surprisingly, most of the participants expressed **little tolerance for ads** (with a few exceptions), and the majority prefer a model that provides access to ad-free content.
 - Some would be open to advertising in exchange for free content, but this openness is limited.
- **One-at-a-time** content can be **of interest, depending on consumption needs** (for example, series on iTunes at \$15, judged a reasonable price), but does not have the “sure value” appeal of the subscription model.

DVD purchases: a rarer phenomenon

- While some participants like to own and collect DVDs of movies and series, they are a minority. However, it is children’s movies that most warrant purchase, because of the large number of viewings expected.
- Otherwise, purchase is motivated by content good enough to be watched again, by special features available only on DVD , and by a good price (3 for \$20). A few people use free streaming or download to get a glimpse of the content, which they then buy if they like it.

If a movie or a series is not available, the search doesn’t take long

- **Most participants** said they **search quickly**, first on their usual sources. Typically, they feel that availability is good online (by download or streaming) and that **content is easy to find**. Little-known movies or series can be more difficult. Sometimes the desired content is available only on DVD, which can prompt purchase.
- The allotted search time can **increase** depending on the **intensity of interest** in a given content, but the truth is that participants have so much choice that other options are always more easily available.
- Some people in the Montréal groups said they would make an extra effort in the case of content in French.





Detailed results

2

Motivations and influences in choosing a movie

Decision-making process | MOVIES

Motivations and influences in choosing a movie

A few general observations

1. Entertainment and relaxation are the fundamental reasons for watching a movie

- Across each of the eight groups, the fundamental reasons given for watching a movie is to be entertained and relax. It serves to unwind after a week of work, or once the kids are in bed. For some, it is a way to pass the time – sometimes even to fall asleep. Only exceptionally do people watch a movie to learn something or because they are fans of a director, for example.

2. The level of involvement in a movie is relatively low

- One might expect watching a movie to be a big family happening or a social event with friends. This is the case with some major productions in first release but, as a general rule, the majority of participants watch a movie as one among many others available at the time.
- Furthermore, a movie does not generate the same level of involvement as a series, since it represents a single viewing occasion with a well-defined duration. Nor can it be easily watched in 45-minute “bites” like a series and is thus is not an ideal choice when time is short.
- As mentioned under Viewing habits, for this reason, some people prefer to watch movies only on weekends, when they have more free time – and in that case the occasion can become more social or engaging.

“Movies are more for the weekend, you need time for it: we won’t watch it Tuesday at 9pm, but Friday at 9pm yes.” - Vancouver, Connected/Superviewer

“Movies are more of an experience. We settle in, make popcorn, more of an event, even at home.” - Vancouver, Connected/Superviewer

3. Plots, yes, but not too cerebral, please

- In a context where viewing serves to entertain and relax and where the level of involvement is generally quite low, **people like movies that are not overly cerebral**. This does not mean that they should be devoid of plot, quite the contrary (people don’t like movies whose outcome can be guessed at the start), but there is a threshold which, if crossed, rapidly makes the movie a niche product more suited for seasoned movie buffs than for ordinary consumers.

*“Series are ongoing, like a marriage – there’s a loyalty factor. Whereas movies are more of a one-night stand.”
- Toronto, Connected/Superviewer*



Decision-making process | MOVIES

Motivations and influences in choosing a movie

Definition of a “good” movie

Mentioned most often

- **Delivers on expectations** of the **genre** (comedy=laugh, action=special effects, horror=scare), suits mood
- **Actors** (liked) and quality of acting
- **Provides an experience: entertains / takes the mind elsewhere /completely absorbs** (in the world, in the story)

Several mentions

- **Script** (story/subject):
 - A **well-woven, coherent, credible plot** that holds up
 - **Surprising, unpredictable, outcome not obvious**
 - **Story’s pacing** (no tedious parts, not too slow, punchy)
 - Arouses **emotions**
 - **Character** development
- **Visual aspect:**
 - “Crazy” special effects
 - Aesthetics/beauty, images/landscapes
- Overall production quality (includes all elements mentioned)

A few mentions

- Thought-provoking, production quality (budget), not too mainstream, sound track

A good movie delivers the desired entertainment and absorbs you in its world

- The **definition of a “good movie”** is a marriage between the reasons for watching a movie and the criteria for choosing a movie.
- It means to **successfully draw the viewer into the movie’s world**, and that is done in different ways:
 - First, by delivering on the **genre’s promise**, providing an **absorbing experience**, featuring **actors** who bring the script to life.
 - Next, by delivering an interesting, convincing **story**, well paced and ideally unpredictable – all that enhanced with well-done **visuals or special effects** and high-quality production values.
- Not everyone managed to articulate the fact that a **good movie** makes them **feel an emotion** but, in essence, that is what constitutes the experience and motivates the choice of a genre: people want to see a comedy to laugh, a drama to cry, a horror movie to feel fear, etc.
- The **cerebral aspect** emerged slightly more in Vancouver and Toronto but as a minor consideration.

“There are so many different kinds of good – sad, or crazy action.”
- Vancouver, Active-at-home

“It’s how often I can pause it to get something – if I can’t, it’s a good movie.”
- Vancouver, Connected/Supervisor

“A good movie is one that is affecting me emotionally or is making me think, even one hour later.”
- Vancouver, Active-at-home

“If I think of fantasy, like Game of Thrones - as a movie, it needs to be good, bigger – story, effects, everything has to be grander.”
- Toronto, Connected/Supervisor



“Il y a des blockbusters que je ne pense pas que cela va m’emporter, mais Incendies, j’ai fini avec des frissons.” – Montreal, Active-at-home

“Les émotions : quand le film finit et que tu réalises que tu es dans ton salon : cela m’a amené ailleurs.” – Montreal, Connected/Supervisor

“C’est émotif. J’ai trouvé Schindler’s List plate mais 6 ans après, je l’ai adoré.” – Montreal, Active-at-home

Decision-making process | MOVIES

Sources of awareness of a movie



This diagram roughly illustrates the sources of awareness and their order of importance based on the number of times they were mentioned. The sources are analyzed in greater detail on the following pages.

1 Trailers/previews

Theatres, theatre or specialized sites, television

1



2

2 Word of mouth

- Family and friends (directly)
- Via Facebook (Mtl)

4 Other advertising

OOH (Out of Home) signage, newspapers, magazines, online pop-ups

4



3

3 Internet: specialized sites or Facebook

- YouTube**
- IMDb**
- Rottentomatoes**
- Apple Trailers**
- Theatre sites (Cineplex, or cinémantréal.com)*
- Cinoche, allociné*
- Wikipedia*
- Comeandseeme.net*
- Streaming sites (wire)*
- Download sites (Torrents, Pirate Bay)*

5 Recommendations and reviews

- In newspapers (movie section in dailies, *Now*, *Metro*) or online
- Including awards and nominations

5



6

6 Box-office performance

Ranking/earnings

	Son of God	US Theatrical Release February 28, 2014			
627k	6.6M	40.4k	57.6k		
Likes	Views	Tweets	Google		
67%	0.62%	26.2k			
PTAT	Buzz	Retweets			

Also

- Availability/featured placement on sources
- Searches for complete works of an actor/director/country

Decision-making process | MOVIES

Sources of awareness of a movie

The sources of awareness of movies are numerous

The means by which the majority of participants discover or hear about a movie are **also sources of information**. Aside from media buzz, the process of discovering a movie is neither linear nor one-directional, and most of the people consulted are more or less permanently on the lookout for audiovisual content.

The level of **media buzz** naturally raises **awareness** of a movie but **does not always guarantee** that people will **like it**. Buzz serves to gain attention by being omnipresent (multiplatform and media-based advertising, nominations or awards, recognition, reputation of actors and director), but the final decision depends on personal tastes.

"After the Oscars, everyone goes to see those movies. If there's a hype, then you think there must be something special." - Toronto, Active-at-home

1

Movie trailers were mentioned by the **vast majority** and are a **crucial vehicle** not only of **awareness** but of **influence** on future choices. A good trailer provides an accurate foretaste of the movie and prompts people to mentally file it under "to see." If a producer has just one means to promote a movie, the trailer should be the priority tool.

- Trailers can be seen on **different platforms**: in theatres, on TV, YouTube, specialized websites (Apple Trailers, IMDb) or streaming or download sites.
- Hearing about a movie and being intrigued can lead to watching a preview (on YouTube or elsewhere) but not necessarily to viewing the film right away.
- A small minority prefer to avoid trailers, feeling that they often reveal too much.



Delay between trailer and movie release

Some feel the delay is long and can weaken intentions, but for "awaited" movies the majority seemed to know exactly what they want to see. Otherwise, most said they remember the feeling they get when they see a trailer and that it influences their choice, even months later.

A good trailer...

- Spurs a **desire to see** the movie
- **Reveals just enough** and not too much (a major turn-off)
- **Effectively conveys the film's atmosphere** (visuals, pacing, music, actors)
- Seems **dense and intrigues** (if not fully understood)
- Is very effective for **sequels**

Decision-making process | MOVIES

Sources of awareness of a movie (cont.)

2

Word of mouth is also a **good vehicle of awareness**, though less powerful than for series. Word of mouth can be shared in person or, to a lesser extent, via Facebook; for example, a conversation or a trailer with comments by a friend. Social networks definitely play a more important role among younger consumers.

“Facebook, les amies en parlent dans une conversation.” – Montreal, Connected/Superviewer

3

A number of participants **keep abreast of movies being released** through a **variety of websites** (see page 38) or **traditional media** (newspapers, news, magazines).

- The point is not to rush off to a theatre but to get an idea of what might interest them, and **this “research” appears to be a common habit**, although not always systematic. For instance, some people check weekly DVD releases to get ideas for downloads.
- The **Internet remains a firm favourite** for viewing trailers or reading reviews or ratings, but the movie section of the newspaper is not the purview of older people alone: younger participants also consult it (though to a lesser extent).
- **Reviews, rankings and ratings** on the various sources consulted definitely affect awareness and buzz but are not considered by everyone, as some people prefer word of mouth from family and friends. Reviews do not always correspond to the consumer’s taste (except for unanimous raves) and ratings have their limits. They serve as a guide but are rarely the only basis for deciding whether or not to choose a movie.
- **Awards and nominations** also add to the buzz surrounding a movie (Oscars, etc.) and expand its reputation.
- **Movie listing websites** (e.g., cinemamontreal.com) are also a good starting point. The consumer picks out a theatre near home and consults the list of new titles, then views trailers, reads viewer reviews, etc.

“Pour les films, c’est plus les journaux, je suis âgé. Je suis journal papier encore. Cahier du cinéma le samedi.” – Montreal, Active-at-home

“After the Oscars, everyone goes to see those movies. If there’s a hype, then you think there must be something special.” – Toronto, Active-at-home

Decision-making process | MOVIES

Sources of awareness of a movie *(cont.)*

4

The presence of a movie on consumption sources/platforms also helps its discovery, often closer to choice time:

- On **Netflix** or **Tou.tv**, the **New Releases** section or **Suggestions for You** page (based on viewing habits) are effective showcases to consult when readying to choose.
- The same goes for **VOD**: If a movie has just been released, it will be on the first pages or under New Titles/Recent Additions, and for many this is one of the **first places consulted** in making a choice.
- On **streaming or download sites**, if a movie appears among the New or Featured titles, or if a pop-up appears, it has a better chance of being noticed.
- The **TV terminal guide** is another engine of discovery. Many people record a variety of movies to widen their pool of potential choices.
- **Pictures on posters or DVD cases at video clubs** also act as points of reference (more so in Sherbrooke).

"Sur Netflix, il y a les nouveautés. Tu y vas et toutes les nouveautés sont là, les recommandations – plus tu écoutes un genre de film et plus ils vont t'en suggérer d'autres." – Montreal, Connected/Superviewer

Decision-making process | MOVIES

Choice criteria for a movie

Choice criteria

Main criteria

- **Mood/genre**
- **Actors**
- **Trailers** (in theatres, on YouTube, other sites)

Several mentions

- **With whom watching** (children, occasion)
- **Reviews**, ratings, rankings, box-office performance
- **Subject/story/themes/synopsis/summary on sleeve**
- **Recommendations** (word of mouth)
- **Nominations, awards**, recognition
- **Director/production** quality or budget (special effects, cinematography, etc.)

A few mentions

- Billboards, posters (OOH), DVD sleeve (video club or picture)
- Visuals, setting
- Country of origin
- Sequel (you know what to expect)

Mood and genre – in short, immediate desire – are the main choice factors

- By and large, it is **mood** (and thus **genre**) that heavily influences spur-of-the-moment choice, Wanting “a good action film” or “a good comedy” pretty much defines the range of movies apt to be seen.
 - **Mood and genre are not static.** The person looking for a comedy one day may be looking for an action film the next day. People may prefer a genre but rarely choose it exclusively: a behaviour observed across the country.
- Regardless of a movie’s quality, actors or reputation (as described in the following pages), if it doesn’t suit the mood or the immediate desire, it will be rejected automatically.
- Conversely, if a movie suits the mood, the rest of the criteria come into play to decide among the available options (for example, if the mood is to laugh and relax, consider recent comedies, etc.).

GENRES

- > Action and Adventure
- > Cinéma québécois
- > Comedy
- > Documentary
- > Drama
- > Horror
- > Disney
- > Kids
- > Music
- > Romance
- > Science-Fiction
- > Suspense
- > Sélection Cool!
- > The Expendables' Flicks

Decision-making process | MOVIES

Choice criteria for a movie

Other quality indicators come to weigh in the balance once mood is determined

- When it comes to deciding among multiple options, most people already have an idea of the movie they want to see, or they consider the **actors, director** and other **quality indicators** to inform their choice.
 - As previously mentioned, **trailers** are essential to get a sense of the movie, even if that sense is simply a memory.
 - A movie that has been heavily **advertised** suggests a big budget and good production quality, whereas media buzz indicates something potentially interesting.
 - The **recognition** that a movie gets, whether through reviews or awards/nominations, also gives it a certain cachet (and feeds conversation).
 - A movie's **subject or story** typically corresponds to the genre and qualifies the decision.
 - A few participants mentioned looking for movies by browsing the entire body of work of an actor or director that they like (on IMDb or Wikipedia, for example); others search by country (e.g., Japanese or Chinese films).
 - And a few will choose a well-rated movie even if it doesn't match their mood.
- Otherwise, **the people** with whom the movie is to be watched or the nature of the **occasion** (casual or organized) also influences the choice.
- **Recommendations** (word of mouth) are highly relevant when family/friends know the person's tastes.

"Un bon film, il vient te transporter. Tu vas voir le preview. Tu es encadré dans un marketing qui te dit déjà. Moi, c'est les bandes annonces et les prix que le film a gagné." – Montreal, Connected/Superviewer

"Recommended by a friend, someone I trust." – Vancouver, Active-at-home

"With the Academy Awards, everyone said 12 Years a Slave is really good, so I downloaded it." – Toronto, Active-at-home

"If I see a movie poster with Matthew McConaughey and Jessica Alba and a unicorn, I'm sold!" Vancouver, Connected/Superviewer

"La publicité, entre autres. Il y a des bons films qui passent, mais qui n'ont zéro annonce. C'est les posters, télé, journaux." – Montreal, Connected/Superviewer



Decision-making process | MOVIES

Choice criteria for a movie *(cont.)*

Reviews and ratings: a complementary criterion

- While many participants read reviews (or descriptions), they **do not consider them the only or most reliable** sources for assessing a movie. They generally rely more on word of mouth or their own impressions. Furthermore, they do **not read reviews systematically** or necessarily at the **time of making a choice**.
- Opinions are divided as to the reliability of professional reviews vs. aggregated ratings or reviews.
 - Sites providing a **large number of ratings** are generally judged more **credible** because of the sample size.
 - **Views differ on reviews** since they reflect the opinions of people who may have different tastes. Some participants read them regularly, others randomly.
 - › Among the few who consult newspapers, some are in the habit of reading the movie section to see what's coming out, while others read a review if they happen upon it. Surprisingly, even young "connected" participants feel that **newspaper reviews** are of **good quality or more reliable**, because the reviewers have a reputation to maintain.
 - › Those who get their information online habitually visit sites like IMDb and rottentomatoes. A few even have apps on their phone.

All movies can be considered

- The participants appear to be **divided** on the **image** of a movie that has had a **theatrical release** vs. a direct-to-DVD or made-for-TV movie. Some insisted that all movies can be considered, since budget does not guarantee creativity. But the overall perceptions correspond to the expected prejudices:
 - Some spontaneously cited an impression of **inferior quality** when a movie goes directly to DVD.
 - A **theatrical release** certainly reflects a bigger production budget, thus a better quality movie, but does not guarantee that the movie will please.
 - "Movies of the week" and made-for-TV movies are apparently recognizable for poor quality production, image, special effects and acting, a lack of big names, few actors, simplistic plots, etc.

"For reviews, you have to trust the source. I'll check on Rottentomatoes.com if I've never seen it – but if I feel like watching it, I'll watch it even if it says it's bad." – Vancouver, Active-at-home

"If I see the section, I might read it." – Toronto, Connected/Superviewer

"900 personnes ne peuvent se tromper." – Sherbrooke, Connected/Superviewer

"Websites [are best] because thousands of people rated it." – Vancouver, Connected/Superviewer

"Il y a des films qui sont vendus à l'avance et d'autres où tu vas te renseigner." – Montreal, Connected/Superviewer

"Ce qui a été dit à propos du film, que ce soit les amis ou les critiques." – Montreal, Connected/Superviewer

"It can be made for TV and be excellent." – Vancouver, Active-at-home

Decision-making process | MOVIES

Choosing a movie

The overall decision-making process is far from linear

If there is one thing to keep in mind, it is that **choosing a movie is not done in a rigorous or systematic way**. Consumers consider multiple criteria, of course, but the process unfolds over time and is not strictly linear.

- As noted under Sources of awareness, they gradually and almost unconsciously **assemble information** about movies (they have seen the trailer, they like the actors, the movie has had a certain buzz, the story seems interesting, the box-office performance was good, they've heard about the film, read reviews on rottentomatoes, etc.).
- When it comes time to choose a movie to see either at home or at a theatre, most people already have the basic information in mind.
- Additional information then helps to inform their final decision.

Movies are watched mainly at home

- Across all groups, excepting two or three movie lovers in each one, **almost all movies** are **watched at home**, and occasionally while in transit/traveling.

Choosing for home: a sometimes lengthy but not very demanding process

- The **increase in at-home movie viewing** and the **greater availability of content** on diverse sources has made the **choice process routine** and lowered the **level of involvement**.
 - As previously mentioned, many people watch movies at home to pass the time, for fun or to relax before going to sleep – activities with relatively low expectations.
 - However, the proliferation of sources and content **also lengthens the process** due to the numerous options that have to be considered to reach a decision. This can be a source of frustration, with some people spending 30 minutes and even up to two hours to make a choice. Conversely, the choice may be made quickly by flipping a coin.
- Some participants organize **more official, social** movie nights with family or a few friends or roommates. These occasions are planned the same day or sometimes for the coming weekend.



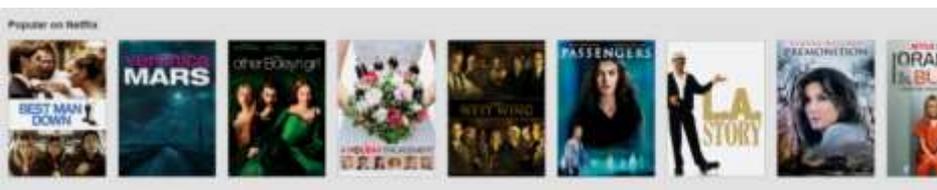
“J’essaie de faire un tri. Si c’est un bon film que je veux voir je peux le garder pour la fin de semaine. Si c’est un film ordinaire, je peux le regarder la semaine.” – Montreal, Connected/Superviewer

Decision-making process | MOVIES

Choosing a movie to watch at home

Availability and promotion on viewing sources: a prerequisite for choice

- **Availability on the sources** underlies the choice process: content **available** or **featured** on a source will be considered. For example, content that is:
 - Already downloaded to a hard drive or recorded on PVR (in this case, the choice to download or record a movie constitutes a form of criteria-based preselection)
 - Included in the DVD collection at home
 - Playing or about to play on a TV channel
 - Available on VOD (new titles, etc.), new additions on Netflix or another streaming/download site: this very simple classification (“new,” “featured” or visually hyped) attracts attention and is the first influence on choice.
- Some participants said they **go through phases**, such as an “action” or “comedy” phase. In such cases, the Netflix recommendation system is useful, because it suggests other movies based on what they have watched recently.



“Netflix, par genre ou dans les suggestions. Tu cliques sur un truc et ils te sortent d’autres choses. Je vais regarder la bande annonce et si cela me plaît, je vais le lancer.” – Montreal, Connected/Superviewer



More powerful filtering or recommendation algorithms

Given the quantity of available choices, the Connected participants in Vancouver suggested more advanced search filters to target their mood and criteria.

Netflix recommendations are one of the easy ways to discover new movies. Still, there seems to be an opportunity to further develop these features.

“Une plateforme qui nous guide. Le fait d’avoir une plateforme avec plus d’accessibilité, mais avoir un profile de visionnement : tu aimes ce genre et je t’en propose 5.” – Montreal, Active-at-home

“If you could filter by a bunch of criteria, most watched, best rated, by director, by actor... and mood!” – Vancouver, Connected/Superviewer

Decision-making process | MOVIES

Choosing a movie to watch at home (cont.)



This diagram roughly illustrates the at-home decision-making process, which is further detailed on the following page.

Continuous information sources

1. Trailers



2. Word of mouth

3. Internet
(specialized sites,
Facebook)



4. Other
advertising



5. Recommendations
and reviews



6. Box-office
performance



I want to watch a
movie ...

Available on my sources

- Live TV channels
- PVR
- VOD
- Netflix
- Streaming sites
- Previously downloaded content
- Owned DVDs
- Video club

One or two main
sources generally
used

1

Weigh the options

Can be time-
consuming

2

Main criterion: my mood

Information sources

What I already know (may have something in mind)

Criteria

Actors/ subject
With whom watching

+

Information sources

Trailer
Synopsis
Images

+ more personal criteria

3

Make a choice

Sometimes a
preselection to
suggest

Decision-making process | MOVIES

Choosing a movie to watch at home (cont.)

Mood is the key factor, but there can be several to satisfy

- At home, the participants turn to their preferred sources and genres, but **mood is invariably the main criterion**. The difficulty in identifying a definitive criterion lies in the wide variety of personal tastes.
 - Often a visual from the movie along with a description is enough to influence the choice, but some people watch a trailer, directly on the platform or elsewhere, and a few read reviews. In Sherbrooke, where video rentals are still common, shelf placement, DVD case images and posters serve the same purpose.
- When it comes to making a choice that **will please multiple viewers** (family or friends), the challenge is harder. In some cases children dictate the choice, but otherwise the process is democratic and involves two steps: first, depending on the source, review the possible choices (for example, paid new releases) and identify a few interesting options; then vote on the preselected options.
 - The preselection is sometimes made by one person (in anticipation of a movie night) and sometimes together at viewing time.

“Normalement, c’est moi qui fouille et qui fait un compte rendu à tous. J’ai 3 choix de pre-selectionnés. Cela ne prend pas de temps. J’aime les 3 et je leur dis : Choisissez-en un. Pour les films, je regarde les previews, même si quelqu’un m’en a parlé. Cela a l’air vraiment bon, lui, il pourrait intéresser ma copine et je le prends en note.” – Montreal, Connected/Superviewer

- For **couples**, the choice is frequently made by one person, or one person accommodates the other. In some cases, if the choice doesn’t please, one person switches to watch a different program on a tablet or laptop. Watching two different movies at the same time in the same place is a new phenomenon enabled by technology.

“Je regarde les sujets abordés: si je veux quelque chose d’historique, ou une série policière. Dans le mood de quoi. Et là, je vais sur l’acteur, si j’en trouve un intéressant ou sinon, le résumé du film.” – Montreal, Connected/Superviewer

“Ce weekend, j’ai regardé 47 Ronins. J’avais vu le preview, j’avais entendu dire que c’était bon et je l’ai trouvé au club vidéo.” – Sherbrooke, Active-at-home

“Pour moi, c’est compliqué : j’ai plusieurs films downloadés et je vais voir le synopsis. J’en commence un et là je me dis, je ne suis pas dans cette humeur-là. Des fois, cela peut prendre une heure.” – Montreal, Connected/Superviewer



“Des films d’action, ma copine n’aime pas ça. En général, avec elle, j’écoute ses films. Si cela m’intéresse moins, je peux prendre mon portable.” – Montreal, Connected/Superviewer

“Mon conjoint est amateur de films, et quand on regarde ensemble c’est lui qui choisit – en général j’aime ses goûts, il me demande si ça me tente...ah oui j’en ai entendu parler. Seule, c’est selon comment je feel. Je vais en streaming, je regarde les films sur le site, selon mon humeur, selon les images et les descriptions.” – Sherbrooke, Active-at-home

Decision-making process | MOVIES

Movie-going

Movie-going: a rarer event

- Due to the trend toward viewing at home, movie outings are **rarer**, occurring on average **once a month to once every 3 months**.
 - In several groups (except in Vancouver), one or two people said they had not gone to the movies during the past year.
 - A few movie devotees in each group go to the movies 2 or 3 times a month.
 - Overall, the profiles are similar. In some of the Connected groups, there were a few more people who go to the movies more often, which corresponds to the recruitment criteria. However, in the Active at Home groups there were generally one or two movie lovers who also go to the movies more often.



Cost is an obstacle to movie-going

- The perceived high **cost of movie-going** seems to explain why the majority of the participants consulted no longer make frequent movie outings. However, many appreciate the quality of the experience, especially options such as Cineplex Odeon's UltraAVX (Ultra Audio Visual Experience), and will pay the ticket price – but the price of the snacks that go with it quickly raises the cost.
- In Sherbrooke, the **drive-in** was mentioned spontaneously by several participants as an attractive option at \$20 per car (for 2 movies): it allows you to take as many people as you want, settle in comfortably and take along food or even beer from home – a fun, inexpensive outing to enjoy an average of two or three times each summer.



“La minivan avec matelas en arrière, on baisse la fenêtre, on est évachés et on fume et on boit.” – Sherbrooke, Active-at-home

Decision-making process | MOVIES

Movie-going (cont.)

Going to the movies for...

- An experience
- An outing (get out of the house, change pace)
- A social, convivial event with family or good friends

Going to the movies: an event

Going to the movies is generally perceived as **an outing or an experience**, often social and shared with friends or children. It's an opportunity to get out of the house, escape the routine or enjoy a "real" outing, with dinner before or after – an easy date-night choice. etc.

For theatre-going, participants **favour** movies whose **visual or special effects** will be enhanced by the **big screen** and **superior sound experience**. **Action films** seem to be particularly well suited, but other movies or genres can lend themselves to theatre outings, depending on individual preferences and the desired experience (drama, comedy, etc.).



*"It's an experience, I don't have a million dollar projector in my house."
– Vancouver, Connected/Superviewer*



"Ça fait différent, le cinéma et le méga-écran. C'est une sortie, au lieu d'aller au resto" – Sherbrooke, Active-at-home

The vast majority expect to still be going to the movies in 5 years.

Movie-going remains an experience: theatres provide a technology not available at home and equipment adapted to showcase advances in film production.

"Je suis amateur de BD et tout ce qui touche ça, je vais y aller. Historique un peu comme les 300. Et je trouve toujours quelqu'un que cela intéresse. Quand le film sort, je veux y aller" – Montreal, Connected/Superviewer

The choice of movie is often known in advance

- In **most cases**, the participants know which movie they want to see at a theatre. As they hear about movies coming out, the majority mentally identify those they would like to see there. In other cases, **the movie is chosen once the decision to go to a theatre is made** (see diagram on the next page).
- Whatever the case, the **decision to go see a movie** at a theatre is generally made **quite spontaneously**.
 - The participants **very rarely** buy **tickets in advance** for the movie they want to see. The majority have a spur-of-the-moment idea to go to the movies or realize that a certain film is playing (through buzz or by visiting various information sources).
 - Typically, **the outing follows the decision fairly quickly**: the same day if the person is alone or going with a friend vs. a few days or a week if the event involves a larger group (girls night out, etc.).

Decision-making process | MOVIES

Choosing a movie to see at a theatre



This diagram roughly illustrates the movie-going decision-making process

Continuous information sources



I don't know which movie...

1

Theatre or newspaper website

See movies listings
Consider 1-2 theatres as needed

2

Weigh the options

Quick discussion/exchange
with partner or friends

Information sources

Evaluations/ratings on theatre sites
(sometimes checking other sites)
Depending on number of comments

Criteria

My mood/the genre
Actors/subject
With whom going

+

Showtimes

Convenience
To decide between two options

I know which movie...

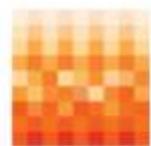
3

Choose movie

Theatre

Date and time

Special theatres (AVX., 3D, etc.)



Detailed results

3

Motivations and influences in choosing a series

Decision-making process | SERIES

Motivations and influences in choosing a series

Reasons for watching/following a “good series”

- **Plot/subject, suspense**, “the drama!,” “big punches,” to know what’s going to happen (ongoing story)
- **Quality/intelligence of scripts**, dialogue, development of story over time, “pushing the boundaries,” “witty,” well-constructed story
- **Characters and their development** (“fall in love,” “love to hate,” become attached to, identify with, want to see how they develop – but must develop in a way consistent with the character)
- **Relax**, enjoy, escape reality, daily routine
- **Dive into another world**, be it realistic (*Unité 9*) or fantasy (*Game of Thrones*)
- **Social aspect/conversation**, the fact of talking about it or that others talk about it, take part in the conversation
- **Actors** (John Hamm of *Mad Men*), acting quality, style
- **Look/visual style, atmosphere** (dark, like *Breaking Bad*, stylish, like *Downton Abbey*)

Appetite or potential for shorter series?

Given its prevalence, YouTube holds promise as a vehicle of awareness and discovery. Series like *True Detective* (with 6 or 8 episodes) are a success.

Ultimately, a series is a relationship

- The **reasons for watching a series** are basically the same as the **motivations for following a series** – and if someone follows a series, it is because the **ingredients of a good series** are there and have managed to hook the consumer (see list at left).
- Like movies, series fulfill people’s **need to be entertained**, to **unwind** after a day’s work and to **dive into another world**, no matter whether close to or far from reality, funny or dramatic, provided it takes them elsewhere.

“Scandal is so good I can’t take my eyes off of it! The way the characters speak, the music, it’s all very engaging.” – Vancouver, Active-at-home

“With series you love the drama – I’m hooked on Housewives! You argue with the TV, I can’t stand the person but you can’t wait to see what they’ll do next!” – Toronto, Connected/Superviewer

- But beyond that, the **primary mechanism of series** is the ability to **maintain suspense** from one episode to the next with the plot: viewers are always left wanting more or with a punch, which generates **involvement** and **conversation** and serves as a **barometer of success**. However, the plot should not be limited to this purpose or deviate from credible character development – otherwise viewers may tune out.

“I don’t like endless shows that drag out. I like short series, with a curve that finishes.” – Vancouver, Active-at-home

“If a character does something stupid that makes no sense, it’s a turn off.” – Vancouver, Connected/Superviewer

- For **building involvement**, series have the advantage of **time**: the **viewer’s relationship with a series**, its world, characters and story evolves, and during that time the series can build its plot and characters more **fully and deeply** than can a movie.

“With good series you get really involved, super interested in what will happen, it’s more real, you start caring for that person.” – Vancouver, Active-at-home

“Avec les séries, on peut s’évader, entrer dans un mode tout autre.” – Montreal, Active-at-home

“On reste sur notre faim.” – Sherbrooke, Connected/Superviewer

“What are they going to do next? How far will they push this?” – Vancouver, Connected/Superviewer

“You keep wanting more!” – Vancouver, Connected/Superviewer

Decision-making process | SERIES

Motivations and influences in choosing a series

Series followed

- *Breaking Bad*
- *Game of Thrones*
- *House of Cards*
- *Walking Dead*
- *Sons of Anarchy*

Toronto/Vancouver

- *Mad Men, Suits*
- *Hannibal*
- *Hemlock Grove*
- *Californication*
- *Newsroom*
- *24, Scandal*
- *Motive*
- *Housewives*
- *Remedy, Rookie Blue*
- *Saving Hope*
- *Big Bang Theory*
- *Modern Family*

Montréal/Sherbrooke

- *19/2, O, Unité 9*
- *Série noire, Destinées*
- *Beaux malaises*
- *Yamaska*
- *Toute la vérité*
- *Glide*
- *Dexter*
- *Personne d'intérêt (US)*
- *La Cible*
- *Once Upon a Time*
- *Salem*
- *Vikings*
- *C'est gars-là*
- *Dr. House*

Consumers mentioned a whole host of series that had **hooked them** through a combination of the factors cited on the preceding page.

- **Must-sees** like *Game of Thrones*, *Breaking Bad*, *House of Cards* and, to a lesser extent, *Sons of Anarchy* and *Walking Dead* stood out across the country for their **impressive production quality, scripts/stories** and **characters**. The rest of the series mentioned vary widely but also reflect the importance of good dialogue and character development, which can very well be achieved with a lesser budget.

"The storyline hooks you – a teacher who is dying of cancer and becomes a meth dealer – wow, that's interesting!" – Toronto, Active-at-home

"Les séries américaines, c'est le visuel qui est formidable." – Montreal, Active-at-home

"Une série n'a pas besoin de coûter cher pour être bon, comme Un gars une fille ou 19/2, beaucoup axées sur le texte." – Montreal, Active-at-home

- Sometimes consumers look for **realistic** worlds or characters with whom they **identify**; at other times, **fantasy** and **different** worlds. Attachment to the characters or a love/hate relationship was mentioned often .

"J'ai le goût d'essayer si c'est mon style, mon genre." – Montreal, Connected/Superviewer

"You become fond of the characters, connected to them." – Toronto, Connected/Superviewer

"Je suis fâchée contre les séries québécoises comme Série Noire qui ne reviendra pas – je m'étais attachée!" – Montreal, Active-at-home

"Il y a des personnages qu'on aime, d'autres qu'on haït...on aime les haïr." – Sherbrooke, Connected/Superviewer

- A **first episode or two** that manages to hook the viewer with at least one (and ideally several) of these elements leads to following the series. As previously mentioned, the availability of entire seasons (current or past) allows people to binge-view and get involved in the story more quickly and deeply.

- Some said they had tried to follow a series but gave up quite quickly due to lack of interest, because it didn't have enough hook factors: examples given include *House of Lies*, *Community*, *Happy Endings*.

"The writing on Modern Family is so funny!" – Vancouver, Connected/Superviewer

"I tried but I just couldn't get into it, it didn't captivate me." Toronto, Connected/Superviewer

"Breaking Bad – how the transformation from gentleman to bastard happens, I want to see how far they will go." – Vancouver, Active-at-home

"Hannibal – I liked the movie so I tried the show and it was really good, I love the set design, costumes, mood, the directing." – Vancouver, Active-at-home

"Hannibal – it's so sick and twisted." – Vancouver, Connected/Superviewer

"Après un épisode, tu le sais." – Montreal, Active-at-home

Decision-making process | SERIES

Motivations and influences in choosing a series

Series: custom-fit, engaging consumption

- The **advantage of series** is that they can be consumed in 20-40-minute “bites” (one episode at a time), a less demanding length than a movie, and that they afford access to a richer, more satisfying and long-lasting world and experience through both their content and the social experience that follows. And, as explained on pages 58 and 59, binge-viewing is becoming an important way of hooking consumers.
- Another **important factor favouring** series consumption, as mentioned under Viewing habits, is the booming growth of the series offer, which is bringing unprecedented **quality** and **variety** and a determination to **push the boundaries** in terms of subjects and angles.
- The **range of series** available includes **2 main types** that impact the level of involvement:
 - **Long-arc series**, where the plot develops over the full series and each episode drives the main story (and where missing an episode is unthinkable)
 - › These, of course, are the series for which the participants expressed the most enthusiasm in the discussions and which drive most conversations with their leading-edge, boundary-pushing content. They are also better suited to binge-viewing and more intensely hooking.
 - **Episodic series** (cop shows, comedies), where each episode contains its own story (allowing viewers to miss an occasional episode) and becomes a regular habit guaranteeing a laugh, or simply a sure value.
 - › The viewing habits of the majority of participants also include a share of more relaxing series, that is, without the high level of suspense of the first type; for example, comedies like *The Big Bang Theory* or *Modern Family*, or police procedurals. This category is especially entertaining and fulfills the need to unwind without becoming too involved.

Both types have their place in the viewing habits, but it is the long-arc series that have changed the series landscape and that generate enormous buzz.

- Consumers have access to a **widely diverse offer** and a variety of sources for discovering the offer, detailed on the next page.

*“Big studio movies take less risks, but series are more creative, and there is more variety, more types, more action, horror, everything!” – Toronto
Active-at-home*

*“Les nouvelles séries anglophones sont faites comme un film, c’est fort, différent des séries québécoises.” – Montreal,
Active-at-home*

*“With some comedies, you don’t go crazy thinking about the next episode – after a stressful day, it’s just nice to relax.” – Toronto,
Active-at-home*

Decision-making process | SERIES

Motivations and influences in choosing a series

Series are discovered primarily through word of mouth, then through ads (among other things)

- **Word of mouth.** The majority of participants consulted reported hearing about a series from friends or colleagues or even by chance, overhearing people discuss it on the street.
 - › If word of mouth is so common, it is because series are a **social phenomenon**, driving conversation with the engaging and often provocative nature of the script or the plot. Some people continue to follow a series not only for the story but to participate in the social current surrounding it.
 - › **Buzz on Facebook**, either by friends or by pages promoting new titles on the feed (Netflix, etc.), also can be a form of word of mouth (mentioned more distinctly in Montréal).
 - › Word of mouth also seems to **encourage following** a series even if it is slow to being with (e.g., season 2 of *GOT*, *Breaking Bad*). In that case, the recommendation comes with a warning (“Watch it, it starts off slow but after that it gets really good.”)
- **TV spots** are also a fairly common vehicle of awareness, especially for the many people who follow current series live. Typically, they show key moments and effectively capture attention and make viewers want to watch the series or episode.
 - › In Sherbrooke, first-run episodes offered free (e.g., *Les Beaux malaises* on Videotron) or promoted in an email from Illico can lead to discovering or trying a series.
 - › For those who watch live, discovery can come from stumbling on an episode (either the opener or during the season, with catch-up later).

“Because series last longer, there’s time for word of mouth.

*Friends will tell me – it’s amazing, watch it.” – Toronto
Connected/Superviewer*

“I trust word of mouth more, because ads will always say it’s good.” – Toronto, Active-at-home

*“Dexter c’était une suggestion faite par des amis.” – Sherbrooke,
Active-at-home*

*“Facebook : par exemple, Dexter, les gens de Netflix ont tout de suite parlé de la nouvelle série.” – Montreal,
Active-at-home*

*“I was told the first season of Breaking Bad was slow – it took forever, but then it would get better, and even better the 2nd season.” – Montreal
Active-at-home*

*“Les beaux malaises, la pub Vidéotron me disait que les 4 premiers épisodes étaient gratuits.” – Sherbrooke
Active-at-home*



Decision-making process | SERIES

Motivations and influences in choosing a series

- Other repeatedly mentioned ways of discovering a series
 - **Recommendations or reviews** are another starting point, on Netflix, IMDb, Rotten Tomatoes and other sites that some participants visit regularly. Awards/nominations, buzz and peripheral content (actor interviews, etc.) are also ways of hearing about a series.
 - › A few people also referred to TV guide/newspaper listings or to the media buzz that surrounds new seasons in September/October. Many sources publish series ratings around that time.
 - **Series availability** also plays a fairly important role:
 - › If a series is available on a platform like Netflix or VOD, the simple fact of being there can lead to its discovery (also the case of exclusivities, such as *House of Cards* or *Hemlock Grove*). The same is true if a friend provides and recommends a downloaded seasons – that automatically leads to trying it.
 - › The availability or accessibility of a season or an entire series can prompt people to try it, because they know that it's available if they get hooked. In that case, the model may be paid (a season on iTunes for \$15, or on Netflix) or free (download, streaming).
 - Sometimes **simply seeing a picture of an actor** (known or not) or from the **show** is enough to **inspire the consumer to try it**.
 - For the minority who watch live (mostly in Sherbrooke), the **timeslot** can determine whether or not the consumer will begin watching a series.
- Some participants said they were **actively looking for** their next series. They do this by asking friends and searching online or traditional sources (reviews, articles) to find the next “hook.”



Decision-making process | SERIES

Means of following a series

Binge-viewing is very widespread, but some prefer moderation

- **No one way of following.** It is rare for viewers to follow series in a consistent way (binge vs. live). Most consumers consulted follow series at times live, at times by bingeing and at times in delayed mode. However, watching live is the least common for the majority and many fall back on PVR.
- **Binge-viewing** is clearly widespread and encouraged by the proliferation of sources and series – and by ad-free models (Netflix, PVR, etc.) A few people mentioned TV marathons (on specialty channels – sci-fi, etc.) as precursors to this phenomenon.
 - Overall, a **majority** reported binge-viewing. The most common cases:
 - › A series already over or with multiple seasons that can be watched via download or paid or free streaming
 - › Episodes of a current series recorded on PVR or downloaded
 - Such viewing involves episodes of the **same series** (3 or more) or of **different series** (catch-up during the week on PVR, VOD or another source).

“Une série, je ne suis pas capable d’attendre une semaine : et je savais que Minuit le soir était finie et je peux me le taper au complet.”
– Montreal
Connected/Superviewer

“No ads! I would never binge-view if there were ads every 15 minutes.”
– Vancouver
Connected/Superviewer



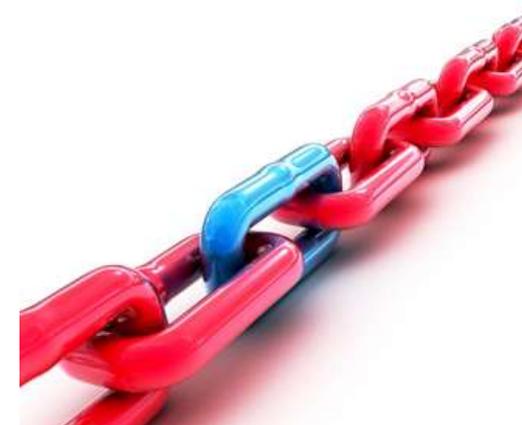
Controversial issue in Vancouver

A few participants voiced concern about the fact that **official broadcaster websites now block content**, permitting free access only to the last episode aired and only for a very short time. To access other episodes, visitors can create a profile but only if they are cable subscribers.

“I just want to see what happens – I lie to myself and say I’ll just watch the first bit!” – Vancouver
Active-at-home

“It’s so easy, stream or torrent, you can have the entire season, boom right there.” – Vancouver
Active-at-home

“If I come in the middle of a series and I like it, I want to watch it from the beginning.” – Vancouver
Active-at-home



Decision-making process | SERIES

Means of following a series

- Others are more **restrained** in their consumption, watching one episode at a time:
 - Most often because they are **following a series live** or delayed to later in the evening or the next day
 - › Several follow **current series**, but less often live (especially in the Connected/Superviewers groups).
 - › **The use of PVR is quite common** to watch a program at the time of one's choosing (often later the same evening or the next day) and to avoid ads; some people begin watching 15 or 20 minutes after the episode starts in order to do this.
 - › Others turn to free download or streaming, even for current seasons, citing ease of access.
 - Or due to lack of time, to enjoy it thoroughly/make the pleasure last, or because they watch the series like a ritual with others (*House of Cards* or *Game of Thrones*).

"When I'm tired and I really want to watch another episode but I know I won't be totally focused." – Vancouver Connected/Superviewer

"If I'm close to the end (of a series/season), I'll stop so I don't finish too fast." – Vancouver Connected/Superviewer

Watching alone or with others, different screens

- The series phenomenon generates conversation, **but a series also can be watched solo** and discussed later, especially when tastes differ or the theme is less suitable for children – or depending on time of viewing.
 - However, some participants reported watching certain series with friends, as a couple or with family (notably *Game of Thrones*), or occasionally binge-viewing with a group of friends.
- **Viewing platforms can vary**, depending on equipment and habits and also on where the series is available. As previously mentioned, series lend themselves better to **smaller screens**, especially for solo or brief watching.
 - **Laptops** and even more so **tablets** easily serve as screens for series, whether on a couch with someone else or in bed (repeatedly mentioned in the groups). Tablets, in particular, are easy to carry around and provide a screen that is large enough but not as absorbing as a big television screen.
 - › Most series do not absolutely require a television screen to do them justice, which facilitates changing screens.
 - **Smartphones** can be used to watch an episode between two courses or at lunchtime, for example. One person even reported playing an episode on YouTube while walking to work – but not watching it, just listening!

"Late at night, when I don't want too much going on [big TV screen], I'll use my tablet." – Vancouver Active-at-home





Detailed results

4

Perceptions of Canada's English- and French-language industries

Perceptions of Canada's English- and French-language industries

Summary movie sheets

Discussion of Canada's English- and French-language industries began spontaneously when participants were asked to name movies and series:

- Made in English
 - Made in French (Montréal and Sherbrooke only)
- The moderator then led a word-association exercise for the English- and French-language Canadian, American and foreign industries.
- Ease of recognizing an English-language or French-language Canadian production (movie or series)
 - Importance in choice criteria

After discussion of the spontaneous responses, the following sheets were handed out in order to assess the degree of knowledge of and reactions to English- and/or French-language Canadian movies.

Note: In Toronto and Vancouver, the French-language productions were neither introduced nor addressed in the discussion – unless mentioned spontaneously.

Examples of English- and French-language Canadian productions



Examples of series

Série Noire	Les jeunes loups	The Borgias (Canadian production)
Destinées	Unité 9	
La Galerie	19-2	
Vertige	30 vies	
Les Parent	Les beaux malades	

Montréal and Sherbrooke

Examples of English-language Canadian movies



Examples of English-language Canadian TV series

- Continuum
- Last Girl
- Orphan Black
- Bitten
- Flashpoint
- Remedy
- Motive
- King
- Saving Hope
- Copper
- Endgame
- Arctic Air
- Bomb Girls
- Republic of Doyle
- Being Erica
- Degazil
- Murdoch Mysteries

Toronto and Vancouver

Perceptions of Canada's English- and French-language industries

The French-language industry appears to fare better than the English-language industry in terms of awareness and image – but both would benefit from greater promotional efforts

English-language Canadian movies

(spontaneous mentions)

Enemy

Ginger Snaps

Good cop bad cop

Trailer Park Boys

(movie)

CRAZY

Anne of Green Gables

Spitfire Grill

Nebraska (?)

Montreal:

- *Juno*

- *Whip it* (?)

- *Titanic* (?)

Sherbrooke: silence

■ There is a strong lack of awareness regarding English-language Canadian movies

- In Quebec, almost all of the people consulted were incapable of naming an **English-language Canadian movie** (silence followed the question), and the situation was hardly better in Toronto and Vancouver, where the vast majority could cite no titles and quickly turned to series. Also, quite a few of the mentions were incorrect.
- Other than recognizable surroundings (e.g., CN Tower) or well-known names, **English-language Canadian movies contain no easy clues** to their origin. Nor does recognizing a place guarantee that the production is Canadian, since a good number of American or foreign movies are shot in Canada.
 - A few participants in Toronto even said that the Quebec industry seemed to fare better, and cited movies or directors having greater international visibility (Denis Villeneuve, *Incendies*).
- When shown the **movie examples** below – 10 in English-speaking Canada, 6 in Quebec (framed in blue) – most people were **not aware of their origin**, despite having seen some. In fact, the vast majority of the movies were known but not all of them by everyone.

“There’s a whole section on Netflix but I can’t remember any!”

– Vancouver, Connected/Superviewer



- In all markets, the movies **Eastern Promises** and **Goon** seemed to have been seen the most, but only *Goon's* Canadian origin was clear, because of the hockey theme. *Art of the Steal* and *Dangerous Method* were also mentioned frequently.
- Some mentioned *Enemy* (spontaneously and prompted) as known or seen. The director’s name (Denis Villeneuve) suggested the origin, but the presence of a well-known actor confused the matter.



What, exactly, is a Canadian production?

The participants in Toronto and Vancouver wondered about **how a “Canadian” production is defined**, since many American movies and series are shot in Canada. The presence of big names suggests an American or British production, and a lot of Canadian talent works south of the border.

Perceptions of Canada's English- and French-language industries

Quebec movies

(spontaneous mentions—
Montréal and Sherbrooke)

Louis Cyr
7 jours du talion
Bon cop bad cop
De père en flic
Le sens de l'humour
Amsterdam
Camping
Florida
Gabrielle
Hot Dog
Incendies
La grande séduction
La peur dans l'eau
Les Boys
Nez Rouge
Starbuck

■ In contrast, French-language Canadian movies enjoy relatively good awareness

- The participants in each group easily named several French-language movies from Quebec, owing in particular to good media coverage of certain productions during the past two years. Furthermore, most agreed that Quebec movies are increasingly available and that the quality is improving.
- The advantage of a Quebec movie is that it is **much easier to identify**, with the **actors** and the **language** (accent, Quebec expressions) as the primary clues but also a typically local approach/humour..
- Among the **6 Quebec movies presented** (blue frame below), *Louis Cyr* and *Gabrielle* were the best known and most seen: several people spontaneously reported having seen them recently and were aware that they are Quebec-made. The majority mentioned the **extensive media buzz about Louis Cyr** and cited the **local, true-story** aspect as an **incentive** to see it.
 - › Several of these 6 movies were simply off the radar, origin unknown, notably *Rebelle* and *Café de Flore*.



A few participants spontaneously asked, "Which are from English-speaking Canada and which are from Quebec." Even language is no guarantee of origin, despite an explicit context.

A need for variety

- Most said that the Quebec movies shown here seemed to be **auteur films** intended for a more limited or niche audience.
- This highlights the **perceived need for a more varied offer that targets a mass audience** and thus provides the entertainment that motivates people to see a movie. .

Perceptions of Canada's English- and French-language industries

“Ça vient me chercher les séries québécoises. Le Québec se démarque, il a son propre style, on ne retrouve pas ça ailleurs.” – Montreal Active-at-home

A similar gap exists between English- and French-language Canadian series

■ Quebec series are quite well known and followed.

- Most **Montréal and Sherbrooke** participants **follow one or more Quebec series** and so were much more familiar with the offer, naming a wide range of titles in the discussions.
- Generally, they perceive **a certain upswing in the variety and quality of Quebec series** in recent years: the **offer is improving**, reflects local culture and can accommodate different tastes, shows different worlds (prison setting, hospital setting, comedies, dramas, old-couple series, etc.).

■ English-language Canadian series are followed far less

- Among the Toronto and Vancouver participants, **awareness of English-language Canadian series was relatively good** but not across the board. Most spontaneously named several series, but some of the titles are from years or even decades ago. Nonetheless, the **majority** claimed to **know all of the English-language series given as examples** in the groups.

Quebec series

(spontaneous mentions)

- **19-2**
- **Unité 9**
- *Ces gars-là*
- *Les Invincibles*
- **Yamaska**
- *Les beaux malaises*
- *30 vies*
- *Destinées*
- *Auberge du chien noir*
- *Les Parent*
- *O*
- *Les rescapés*

English-language Canadian series

(spontaneous mentions)

- **Flashpoint**
- **Vikings**
- **Corner Gas**
- **Road to Avonlea**
- **Motive**
- **Little Mosque on the Prairie**
- *Dragon's Den*
- *Chopped, Master Chef*
- *Degrassi*
- *Rookie Blue*
- *Saving Hope*
- *Remedy*
- *Cold Case*
- *Any CBC program*
- *Arctic Air*
- *Nord 60 (Sherbrooke group)*
- *Beachcombers*

Examples of English-language Canadian TV series

- | | | |
|----------------|---------------|---------------------|
| • Continuum | • Motive | • Bomb Girls |
| • Lost Girl | • King | • Republic of Doyle |
| • Orphan Black | • Saving Hope | • Being Erica |
| • Bitten | • Copper | • Degrassi |
| • Flashpoint | • Endgame | • Murdoch Mysteries |
| • Remedy | • Arctic Air | |

“I don't know many people that watch these shows.” – Toronto, Connected/Superviewer

Sparsely watched series do not benefit from word of mouth or buzz that encourages people to try them.

- **Flashpoint** is without doubt the series that stood out the most across the country, due to its international success. Other than that, silence reigned in the Quebec groups, with one or two mentions of *Vikings* or *Corner Gas* emerging.

- However, contrary to the situation in Quebec, only **a few participants** in Toronto and Vancouver group reported **following an English-language Canadian series**. Those people have a more positive perception, but the majority consider English-language Canadian series quite **conservative**, even **boring, slow-paced** and **less innovative** in terms of subjects/plots and camera work.

“They're a lot tamer than American series. I tried to watch, but it's boring.” – Toronto Connected/Superviewer

Perceptions of Canada's English- and French-language industries

Contrast with American and foreign productions

This page presents compilations from the word-association exercises done in the groups. The exercises are discussed on the next page..

French-language Canadian productions

(spontaneous mentions)

- **Local, homegrown, regional, belonging**
- **Funny, comedy, humour, original**
- **Not enough**
- **Medium, good or rotten quality**

Series

- **Better than movies**
- **Variety of themes, lots of them, comedies and dramas**
- **Familiar, specific to us**
- **Yowling, overly dramatic**

Movies

- **Actors = often comedians, often the same (Patrick Huard, etc.)**
- **Better than before, bank on Quebec aspect**
- **More variety, quality closer to American films/succeed elsewhere**

"Une série québécoise n'aura jamais à envier une série canadienne – le thinking est différent." – Montreal Active-at-home

English-language Canadian productions

(spontaneous mentions)

- **Low budget, humble, production/lower quality, less good acting, B series**
- **Boring, conservative, more serious, dark, quiet, slow, weaker content/stories**
- **Landscapes, forests, rural, little towns/villages**
- **Funny, arty / creative, Indie**
- **Multicultural, diversity (Quebec, Maritimes)**
- **Accent/language, familiar surroundings (CN Tower, etc.)**
- **Classy, quality**
- **Like Canadian literature**
- **Hockey**

"Quebec TV is very different, very good, they have a good sense of humour." – Toronto Connected/Superviewer

American productions

(spontaneous mentions)

- **Boom bang, special effects, action, violence, explosions/ shoot-ups, superheroes, sex (T&A), blockbusters, fun, intense**
- **Big budget, cash/Hollywood money, quality, reference in the industry**
- **Good actors, big names, stars (Arnold Schwarzenegger, Die Hard, Fast and Furious, Paramount, Disney)**
- **Diversity, variety**
- **Current**
- **Anything and everything, offensive/controversial**



Foreign productions

(spontaneous mentions)

- **More content, more cerebral/intelligent, recherché/filtered, dramatic, artistic, sophisticated, profound**
- **More interesting, original / unorthodox /avant-garde / experimental, innovations, great discoveries, different sensitivity, cultural**
- **More eye-pleasing, artistic**
- **Documentaries, reportages, historical, poverty, war, politics, human interest, controversy, true stories**
- **Subtitles, other languages**
- **Not enough (availability, awareness)**
- **Boring, long, afraid to watch**
- **Pretentious**
- **Bollywood**
- **European**

"It's extreme, it pushes the limits in a way that US movies don't, twisted, groundbreaking." Vancouver Connected/Superviewer

Perceptions of Canada's English- and French-language industries

Means to encourager consumption

Humour, yes, but perceptions freighted with prejudice

- **Humour** emerges as one of the **strengths** of the industry in **both English-speaking Canada and Quebec**. It was noted that the English-language industry lacks a local star system, because most well-known English-speaking Canadian actors and directors work in Hollywood or abroad. This is not true of Quebec, though, which may in part explain the local industry's success.
 - The participants named several directors including David Cronenberg, James Cameron and, in lesser numbers, Denys Arcand, Atom Egoyan, Karl Bedeken, Allison Gwin. Actors: Ryan Gosling, Ryan Reynolds, Rachel Macadam, Seth Rogen, Paul Green.
- However, **French-language movies** suffer from an image of small, low-budget productions mostly focused on humour. Nevertheless, a **certain momentum is growing** due to the improvements observed, leading consumers to begin noticing what's being made and **inclining them to try Quebec content**.
- **English-language productions** suffer most severely from a **lack of awareness** and **negative prejudice**: besides a perception of low budgets and poor production quality, the industry is burdened with a **conservative, boring, rural, slow, old-fashioned, very clichéd** image – the exact opposite of the wave of intensity and innovation felt in American series. It is an image that younger participants struggle to identify with – they see nothing appealing there. Some, more familiar with English-language Canadian productions, defended their creative or multicultural aspect, but they were a minority.
- **American productions evoked a very coherent** but also **very stereotyped** image: the three main association were **big budgets, blockbuster action films** with extravagant special effects and violence, and **big names** (actors, directors, major studios). Some people qualified these remarks, noting that a big production budget does not necessarily mean quality. But American or Hollywood productions remain THE (or at least A) major reference for movies and series.
- **Foreign productions** elicited a rather positive image of **denser, more cerebral, sophisticated, avant-garde** and **visually pleasing** content and associations with **documentaries** or **stories reflecting reality** – but for a few in Sherbrooke they brought to mind “boring” and “long.”

“A lot of Canadian directors are known for their American movies. Isn't James Cameron Canadian?” – Toronto Connected/Superviewer

“Si c'est un film drôle québécois, on ne sera pas déçu. Mais un film d'amour québécois, on risque d'être bien déçu, et un film d'horreur encore plus.” – Sherbrooke Connected/Superviewer

“C'est de mieux en mieux. Si on me conseille un film québécois c'est sûr que je vais le regarder.” – Sherbrooke Active-at-home

“I don't watch Canadian shows, if there were any good ones I would watch them. US top shows have higher quality, acting, storyline.” – Toronto Active-at-home

“Canadian movies are low budget, cheaply made. The acting, the effects are so bad. It has a lot to do with acting and directing. The same actor in a Canadian vs. an American movie, the result will be completely different.” – Toronto Connected/Superviewer

Perceptions of Canada's English- and French-language industries

Means to encourage consumption

Mixed opinions about promoting English- or French-language Canadian content as such

- In Montréal and Sherbrooke, the idea of **labelling** a movie as **Quebec-made** was generally **well received**, a reaction in line with the relatively positive perceptions of the industry.
 - Most of the participants exhibited a certain attachment to consuming homegrown content. (*“Nos racines, c’est plus près de chez nous, c’est notre façon de parler.” / Our roots, it’s closer to home, it’s our way of speaking.*)
- However, it seems that **English-language Canadian content** would be **handicapped** by a comparable **label**, given the prejudices against it. Several people said they prefer to see a movie or series before learning that it is a Canadian production.
 - When the participants in Toronto and Vancouver saw the movies presented on the sheet, some began to change their opinion (*“It’s not as tame as I thought.”*) and others were interested enough to make notes or take photos, intending to learn more or to watch them.
 - The Quebec participants were less inspired because, in addition to a lack of familiarity with the titles, many identify less with English-language than with French-language content.
- Nevertheless, the near majority said that a **clear label arouses curiosity** and leads them to **consider the content** – or can **strengthen their intention** to see a movie that has **already caught their interest**.
- In all cases, however, this is a secondary consideration and the **content is judged** first by the **choice criteria**.
 - While quality (in terms of criteria) is important, some participants said they are more prepared to pay for Canadian content or to go to a theatre for it.

“I want to see them all, they look interesting”. – Vancouver Connected/Superviewer

“There are no critically acclaimed Canadian movies, rarely do I read an amazing review about a Canadian movie. If there were, I’d be more inclined to pay for Canadian content. – Vancouver, Connected/Superviewer

Perceptions of Canada's English- and French-language industries

Means to encourage consumption

"Plus de gens en voient, plus les gens en parlent." – Montreal, Connected/Superviewer

Improve production awareness, variety and quality

- The vast majority of movie lovers consulted agreed that **multiple keys to success must be put in place to bring the industry up to international standards**. Industry development is desirable, since everyone is looking for good content, but that content will be judged in the same way as the best of the existing offer – especially for English-speaking Canada.



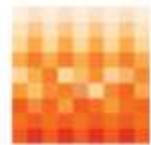
Spontaneously (Montréal, Sherbrooke) or in briefly brainstorming in teams of two (Toronto and Vancouver), the participants converged on **several ideas**:

- **Establish a strong media presence to increase awareness and appeal:** trailers, TV spots, billboards, online and social media presence, theatre, radio and newspaper presence (particularly in English-language Canadian media vehicles), viral promotions, etc.
 - ▷ Promote a **general message about the industry**: emphasize variety, current resurgence (via PR)
 - ▷ Include **discovery incentives**: free screenings or tickets, free ticket contests, bonus points (e.g., triple points) at Cineplex to see a new movie
 - ▷ Consider **cross-promotions** or marketing with Canadian companies (Second Cup, posters or Telus, to promote content to customers)
 - ▷ Promote **within other programs** (e.g., *The Big Bang Theory* characters discuss the shows they watch)
 - ▷ Ensure **availability in theatres, on VOD**; good turnover of different titles on television (without repeating the same movies)
 - ▷ Highlight or seek **international recognition**: awards and nominations, ratings and reviews, presence on websites and ratings
 - ▷ Establish or promote **festivals** devoted to English- and/or French-language Canadian content (and to exchanges between the two industries)
- **Improve production quality:** higher production standards, more grants/funds to support the industry, skilled use of creativity, more original/captivating stories/plots, better acting (invest in actor training, more money to keep Canadian artists in Canada) and well-known names (especially in **English-language Canadian films/series**).
- **Expand the variety of the offer:** more variety and genres, more mass-audience productions (vs. auteur, niche or "thought-provoking" films) and universally appealing subjects.
- **Promote well-known names** (especially in **English-language Canadian films/series**).
- **Educate** the public as to what constitutes a **Canadian production**, communicate the benefits of supporting the industry or of trying Canadian content.

*"Actors with star appeal!"
"Good quality acting, people who care about their craft."
– Toronto
Connected/Superviewer*

"They need to destroy preconceived notion of what a Canadian movie is, get people excited about Canadian movies, then new generations will look for them."

*"More grants and funds for emerging Canadian artists, so they stay here, improve from the ground up."
– Vancouver
Connected/Superviewer*



Screener



Discussion Guide

Appendix I

Research tools

[Screener \(link\)](#)

[Discussion Guide \(link\)](#)

TELEFILM
C A N A D A



Canada
Media Fund

SODEC

Québec



Appendix II

Homework analysis

Homework analysis

The homework compilation confirms the findings from the groups. The table at right presents a summary:

- Most movies and series are **watched at home**, with just 12 theatre outings reported out of 222 movies (5%).
- **Evening** is the preferred viewing time for the great majority.
- **Movie viewing** is divided fairly evenly among solo, couple and group – in most cases, movies are not watched alone.
 - **Series** are watched more **alone** and, to a lesser extent, by two people, but rarely in a group.
- The **television screen** is still the primary platform, but computers and tablets account for a significant share of the content viewing.
- Among the sources:
 - **Series** are watched **live** or **recorded** more than movies.
 - **DVDs** (owned or rented) top the list for **movies** watched (followed by live viewing).
 - **Netflix** ranks **3rd** and is used equally for both types of content.
 - **VOD** is **used far more for movies** than for series (ranking 4th and 5th, respectively).

The complete compilation is available on request in a separate document.



	TOTAL		FILMS		SÉRIES	
	n	%	n	%	n	%
Type de contenu	679	100%	222	33%	457	67%
Endroit						
Maison	630	93%	191	86%	438	96%
Cinéma	12	2%	12	5%	0	0%
Ailleurs	35	5%	19	9%	16	4%
Autre/SR	3	0%	0	0%	3	1%
Période						
AM (6h à 12h)	65	10%	23	10%	42	9%
PM (12h à 18h)	136	20%	45	20%	91	20%
Soir (18h à 6h)	469	69%	153	69%	316	69%
NSP/SR	9	1%	1	0%	8	2%
Nombre de personnes						
1	302	44%	79	36%	223	49%
2	244	36%	84	38%	160	35%
3 ou plus	84	12%	51	23%	33	7%
NSP/SR	49	7%	8	4%	41	9%
Langue						
Français	264	39%	126	57%	138	30%
Anglais	404	59%	88	40%	316	69%
Autre	2	0%	2	1%	0	0%
NSP	9	1%	6	3%	3	1%
Plateforme						
Télé	500	74%	163	73%	337	74%
Ordi	124	18%	35	16%	89	19%
Tablette	21	3%	3	1%	18	4%
Téléphone	21	3%	11	5%	10	2%
NSP/SR	13	2%	10	5%	3	1%
Source						
En direct	181	27%	41	18%	140	31%
Enregistré	171	25%	30	14%	141	31%
DVD	62	9%	48	22%	14	3%
Netflix/iTunes	108	16%	36	16%	72	16%
VSD	72	11%	34	15%	38	8%
Autre	72	11%	32	14%	40	9%
Autre : streaming gratuit	3	0%	0	0%	3	1%
Autre : tou.tv	7	1%	0	0%	7	2%
Autre : youtube	1	0%	0	0%	1	0%
NSP/SR	2	0%	1	0%	1	0%



The results in the above table are provided for illustration only.