



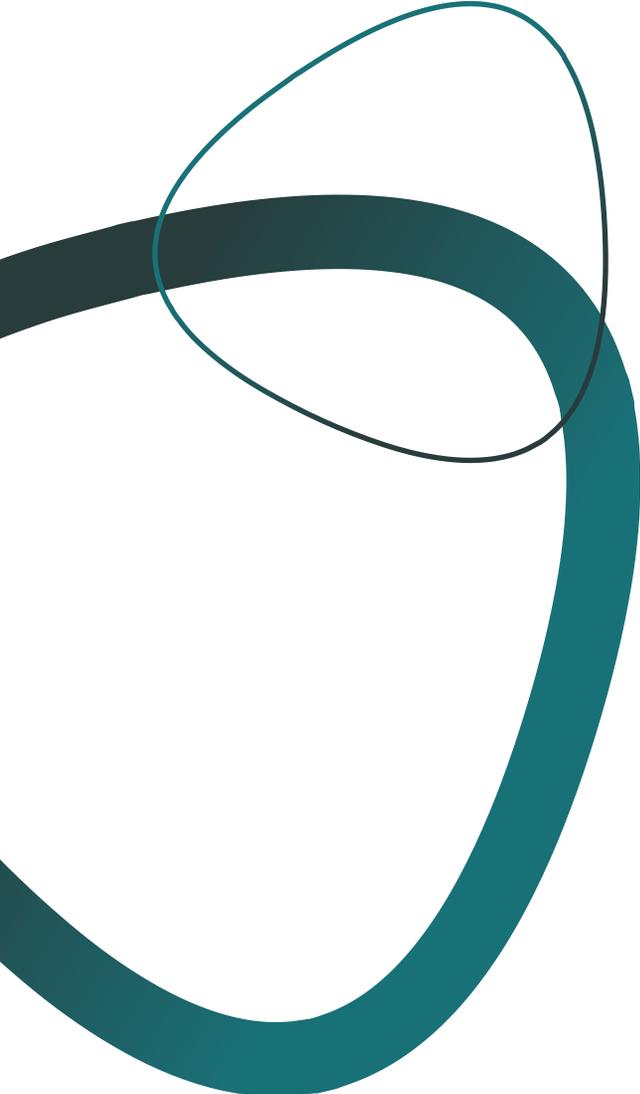
2019 Canadian Moviegoing

June 16, 2020

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EXECUTIVE SUMMARY



ATTENDANCE HAS INCREASED BUT FREQUENCY HAS DECLINED

Just over three-quarters of Canadians aged 13+ attended at least one movie in the theatre in 2019. This equates to 24.9 million moviegoers as opposed to 20.3 million moviegoers in 2014 (66% of Canadians aged 13+). While self-reported attendance in 2019 has increased, the frequency of moviegoing is lower, which results in a box office that is relatively static when comparing the two years.



MOVIEGOING TICKET CONSUMPTION TRENDS YOUNGER & MALE

On average, each Canadian purchased three tickets in 2019, with males purchasing roughly one more ticket than females per capita. The most frequent moviegoers are those aged 13–44, with each age segment under 45 purchasing at least three tickets per capita in 2019.



HEAVY MOVIEGOERS CONTINUE TO DRIVE TICKET SALES

While heavy moviegoers make up the smallest segment of moviegoers (18%), they value the moviegoing experience more than others and account for nearly three out of five tickets sold in Canada during 2019 (57%). Compared to 2014, heavy moviegoers make up a slightly larger proportion of the moviegoing audience (18% in 2019 compared to 16% in 2014). Males over index even more as heavy moviegoers in 2019 compared to 2014, and those aged under the age of 45 continue to be the most frequent moviegoers in 2019, as they were in 2014.



STREAMING AT HOME IS A GROWING PREFERENCE

While the heaviest moviegoers see streaming as an additional way to supplement their movie viewing, light and moderate moviegoers are more likely to use at-home viewing as a substitute for the theatrical experience. Aside from cost, the top barrier for seeing more films in theatres is the preference for at-home viewing (cited by 40% of moviegoers in 2019 compared to 28% in 2014).



MOVIEGOERS VALUE AN IMMERSIVE EXPERIENCE

Even though streaming options have grown since 2014, time and money permitting, most moviegoers still prefer to see movies in theatres rather than at home. The most popular element of the theatre experience is the big screen that creates an immersive atmosphere. Others feel that the experience of seeing a movie is heightened by sharing it with others.



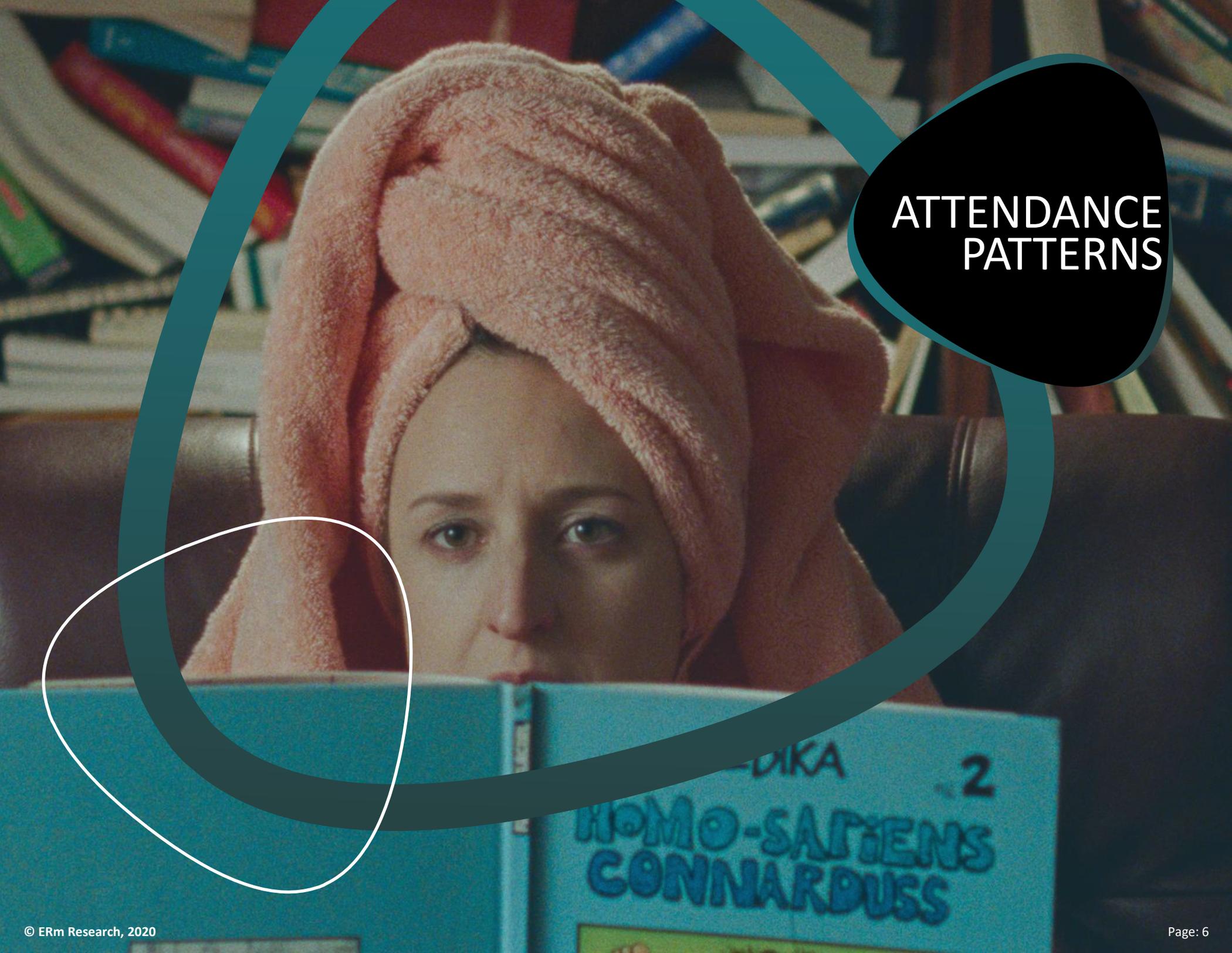
ACTION GENRES DRAW MOVIEGOERS TO THEATERS

Comedy and action movies continue to stand out as moviegoers' favourite genres to see in a theatre, followed by suspense/thrillers. However, movies that are considered most important to see in theatres are those that make extensive use of special effects—action, superhero, and science fiction. Over half of action fans (57%) say action movies are important to see in theatres. By contrast, just 23% of comedy fans say the same.



KEY DRIVERS OF ATTENDANCE SHOW MINIMAL CHANGE

Positive word of mouth and trailer viewership continue to drive movie attendance, and when choosing a theatre, cost, comfort, quality, and convenience are key. As certain features become more widely available, such as reserved or luxury seating, they have become a more important part of the experience to a larger share of moviegoers.

A woman with a pink towel on her head is reading a book in a library. The book she is reading has the title 'HOMO-SAPIENS CONNARDUSS' and the number '2' on the cover. The background is filled with bookshelves. A large teal graphic element, resembling a stylized 'C' or a thick brushstroke, frames the woman and the book. A white oval highlights the left side of the teal graphic.

ATTENDANCE PATTERNS

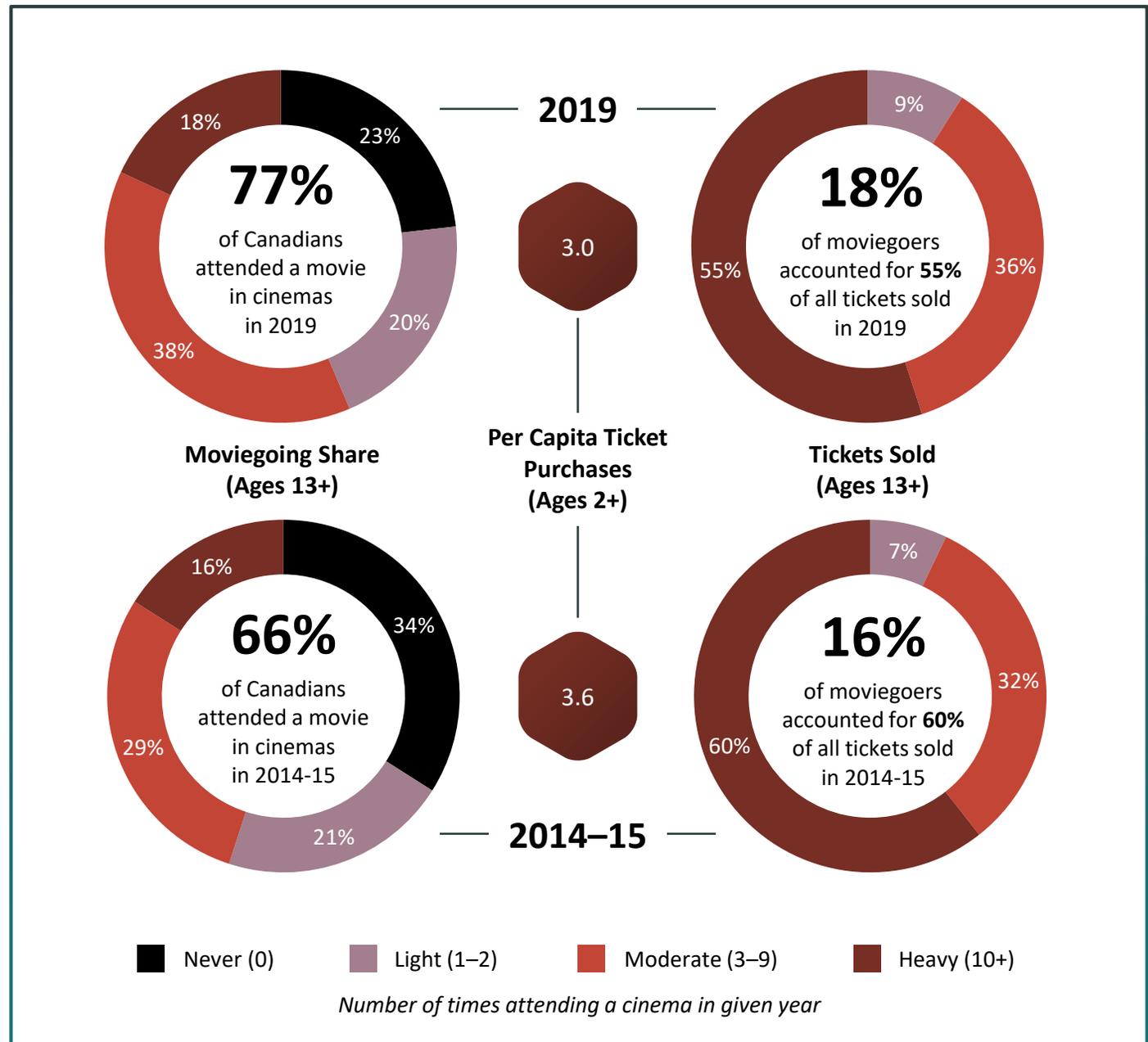
Movie Ticket Consumption

Just over three-quarters of Canadians aged 13+ attended at least one movie in the theatre in 2019. This equates to 24.9 million moviegoers and is an 11-percentage point increase from 2014–15.

However, while more Canadians (13+) went to at least one movie in 2019, the number of tickets purchased per Canadian aged 2+ (per capita consumption) decreased by 20% to an average of 3.0 tickets per Canadian. That is **more Canadians attended movies in 2019, but they attended less frequently.**

While heavy moviegoers represent the smallest segment, they purchased the majority of all tickets sold—55%—in 2019. Moderate moviegoers purchased the majority of the remainder of all tickets.

The percentage attending at least one movie in a theater is based on self-reported data among those who were surveyed that are 13+. Attendance per capita was calculated using admissions and average ticket price among all Canadians aged 2 and up, assuming a similar proportion of moviegoers aged 2-12 as those 13+.



Q. To the best of your memory, how many movies did you see in a theatre over the twelve months of 2019?

Moviegoers 13+ vs. Canadian Population

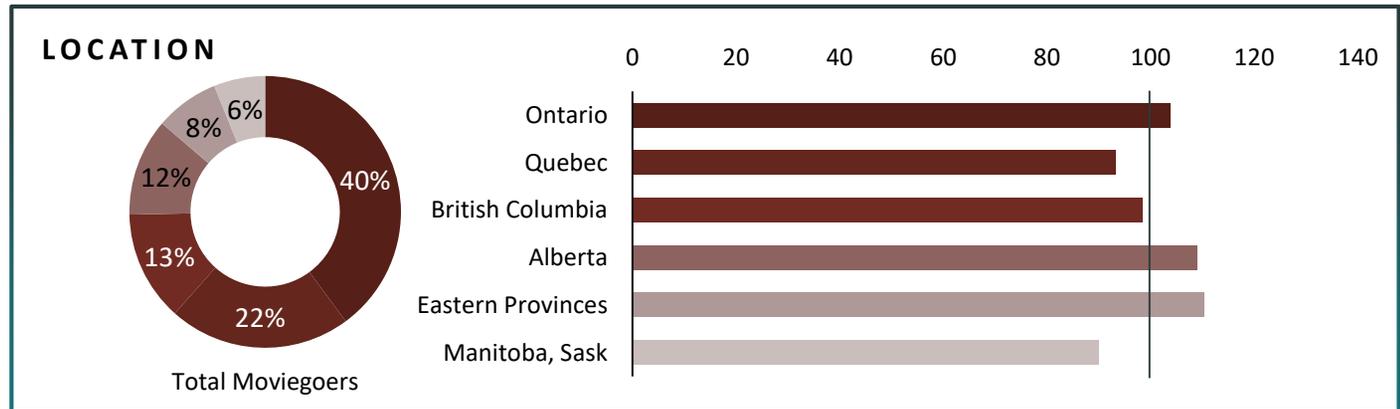
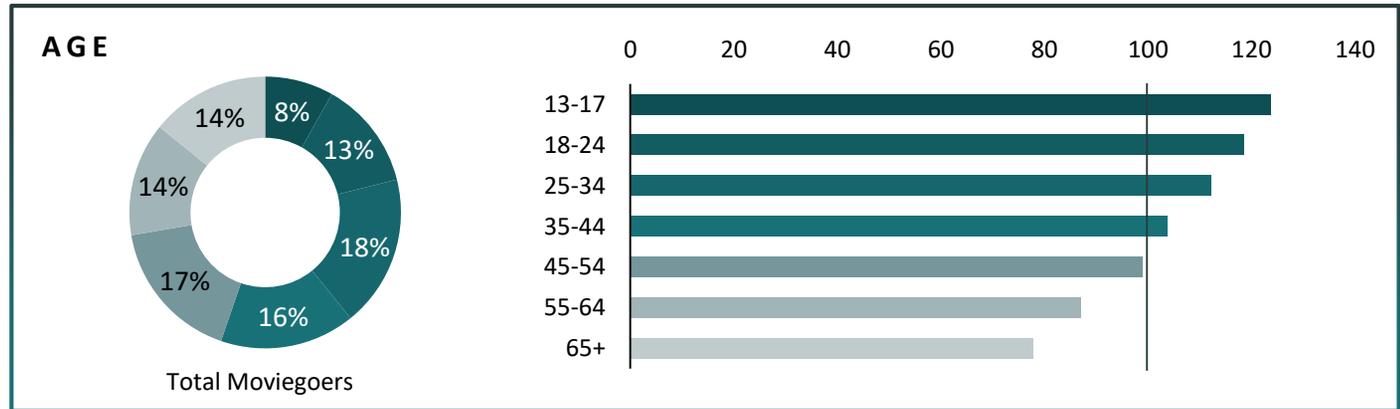
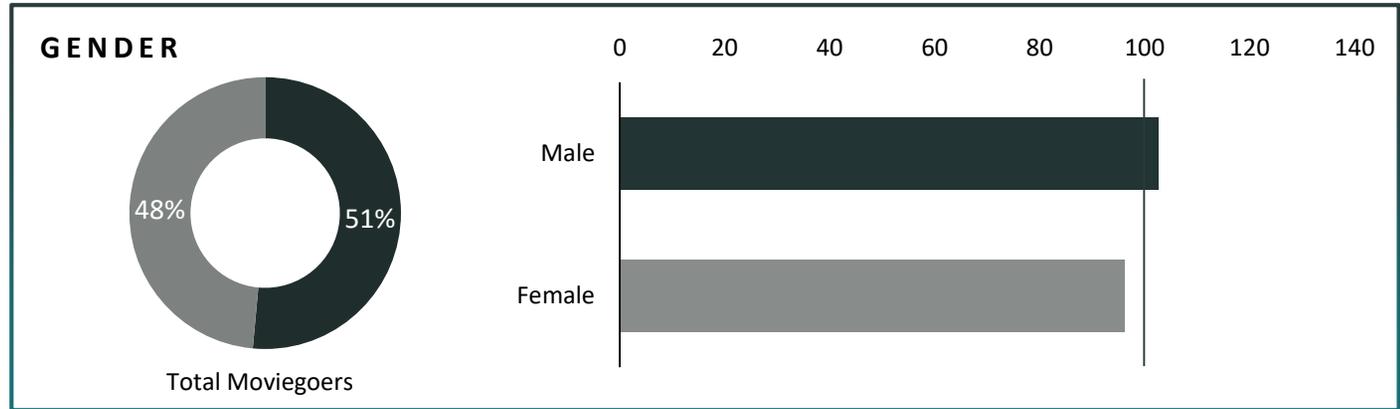
Males slightly over-index as moviegoers compared to the overall Canadian population, though by a slight margin.

Moviegoers skew younger, with all age segments from ages 13 through 44 over-indexing against the population.

Conversely, moviegoers aged 45 and older under-index in comparison to the population.

Ontario residents make up 40% of moviegoers, which over-indexes relative to the overall population. While the Eastern Provinces and Alberta over-index, other provinces—including Quebec and Manitoba/Saskatchewan—make up a smaller portion of moviegoers than they do the overall Canadian population.

Numbers greater than 100 in the charts to the right indicate groups who are overrepresented among moviegoers relative to the total population, numbers less than 100 indicate groups who are underrepresented among moviegoers relative to their population.

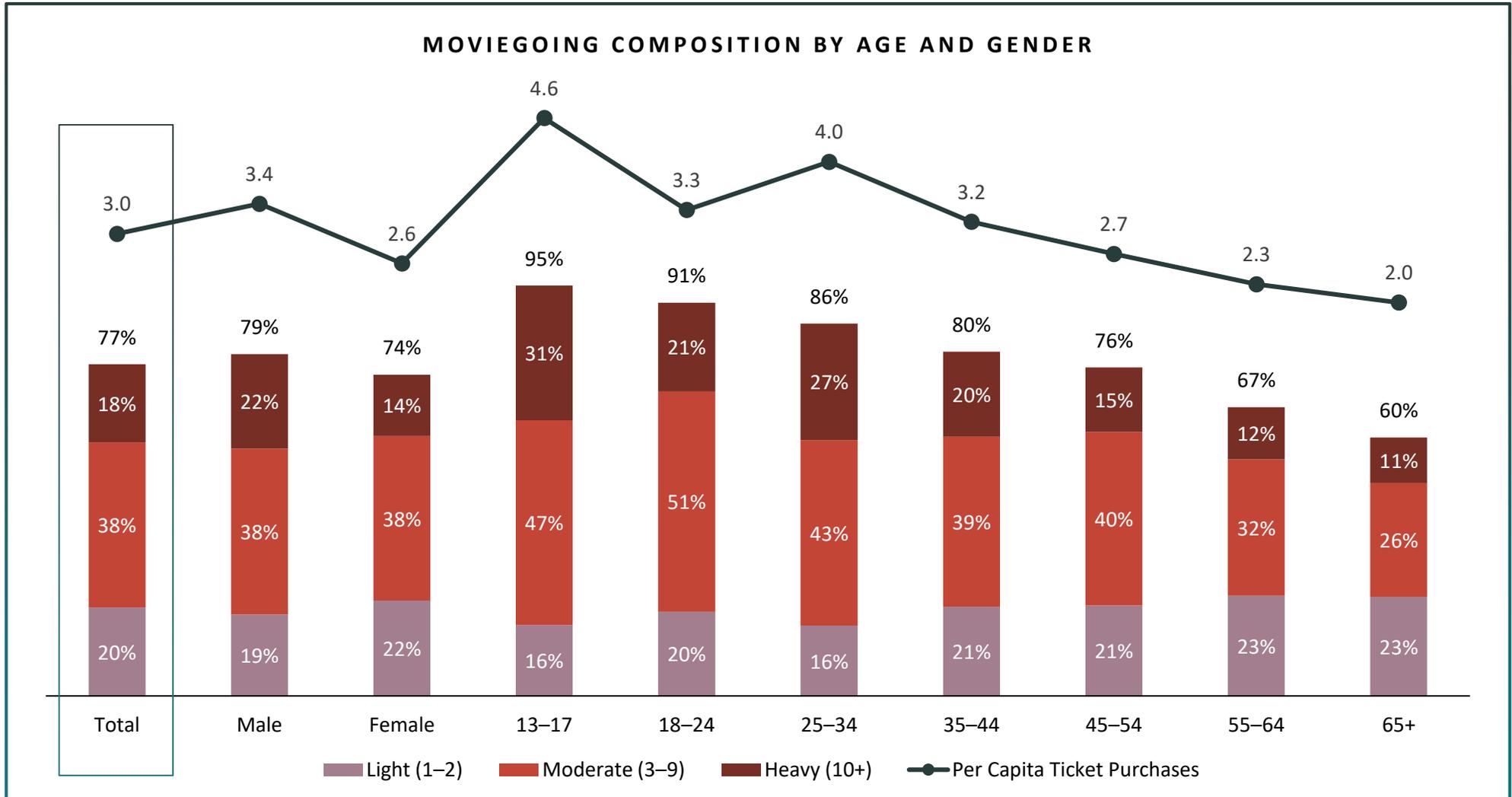


Q. To the best of your memory, how many movies did you see in a theatre over the twelve months of 2019?

2019 Movie Ticket Consumption (Age 13+)

On average, each Canadian purchased 3.0 tickets in 2019. Males purchased nearly one more ticket than females per capita in 2019.

Looking at attendance by age, per capita attendance was highest among 13–17-year-olds, who had the largest proportion of moviegoers at 95%. The most frequent moviegoers are those aged 13–44, with each age segment under 45 purchasing at least three tickets per capita in 2019.



Q. To the best of your memory, how many movies did you see in a theatre over the twelve months of 2019?

Heavy Moviegoer Composition

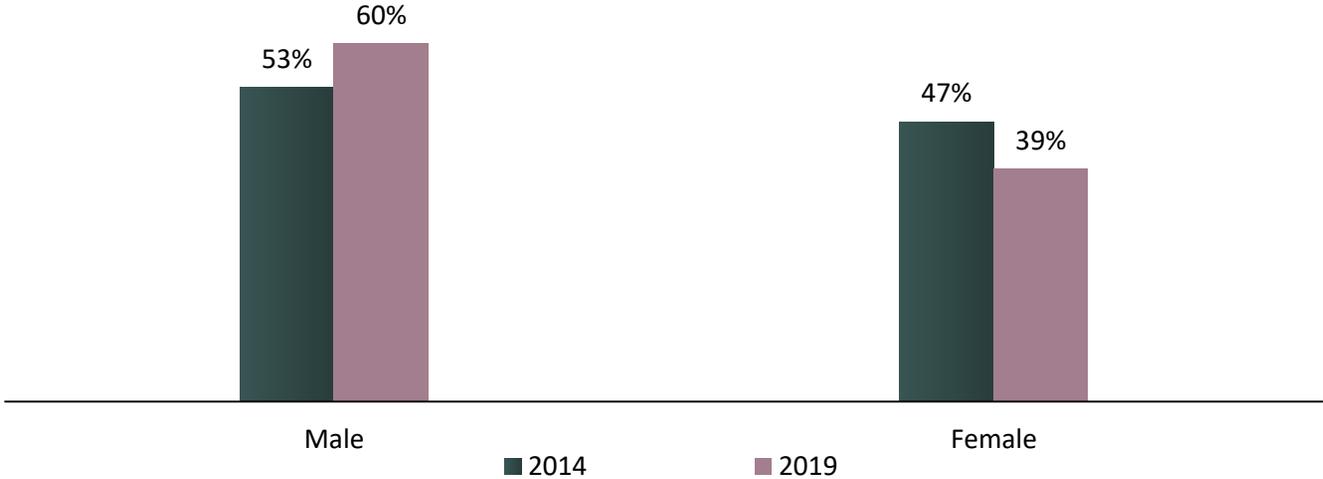
Compared to 2014, heavy moviegoers make up a slightly larger portion of the moviegoing audience (18% in 2019 compared to 16% in 2014).

Heavy moviegoers continue to skew male, making up an even greater proportion of the segment in 2019 than they had in 2014. Three out of five 2019 heavy moviegoers identify as male, compared to just over half of 2014 heavy moviegoers.

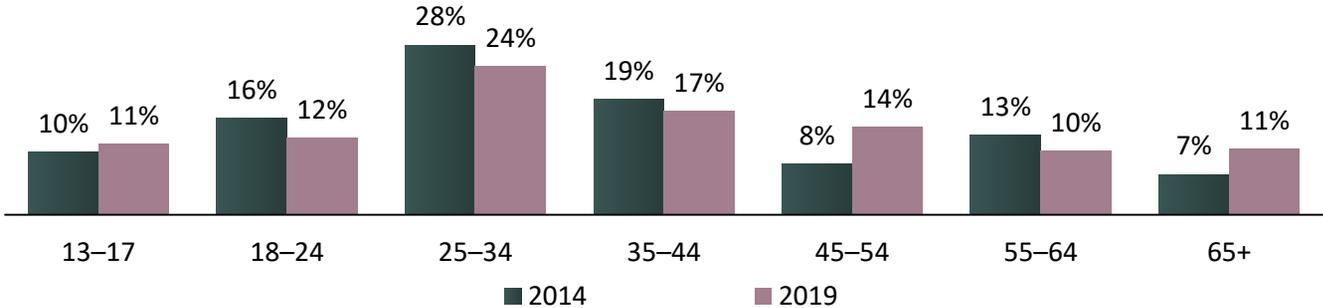
Heavy moviegoers continue to skew younger, though the portion of those under 45 has decreased since 2014.

Please note, these changes in composition are a snapshot in time and not indicative of an overall year-to-year trend.

GENDER COMPARISON FROM 2014 TO 2019



AGE COMPARISON FROM 2014 TO 2019



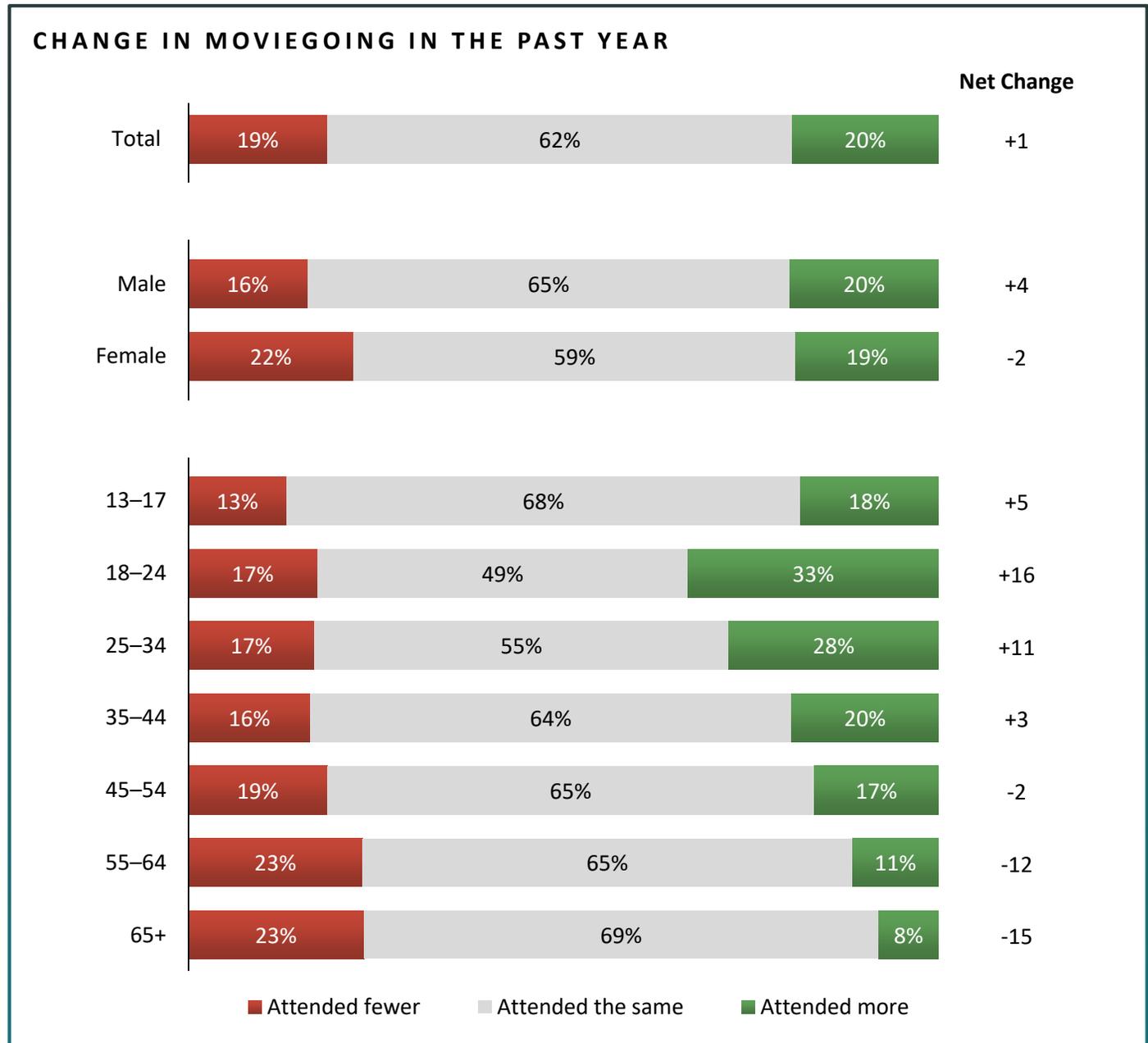
Q. To the best of your memory, how many movies did you see in a theatre over the twelve months of 2019?

Self-Reported Change in Attendance

The majority of moviegoers indicated their attendance at theatres hasn't changed compared to 2018. Of those who did report change, they were equally likely to indicate their attendance increased as they were to say it decreased, resulting in little net change in attendance from year to year.

There are differences, however, by segment. Moviegoers under the age of 45 report attending more movies recently than they did previously, while older moviegoers say they attended fewer movies on the whole.

Please note: those that did not attend a movie in 2019 (including some who might have gone in 2018) are not included in these data. Therefore, while self-reported attendance is relatively flat, actual attendance would show a change that is in line with actual box office admissions.

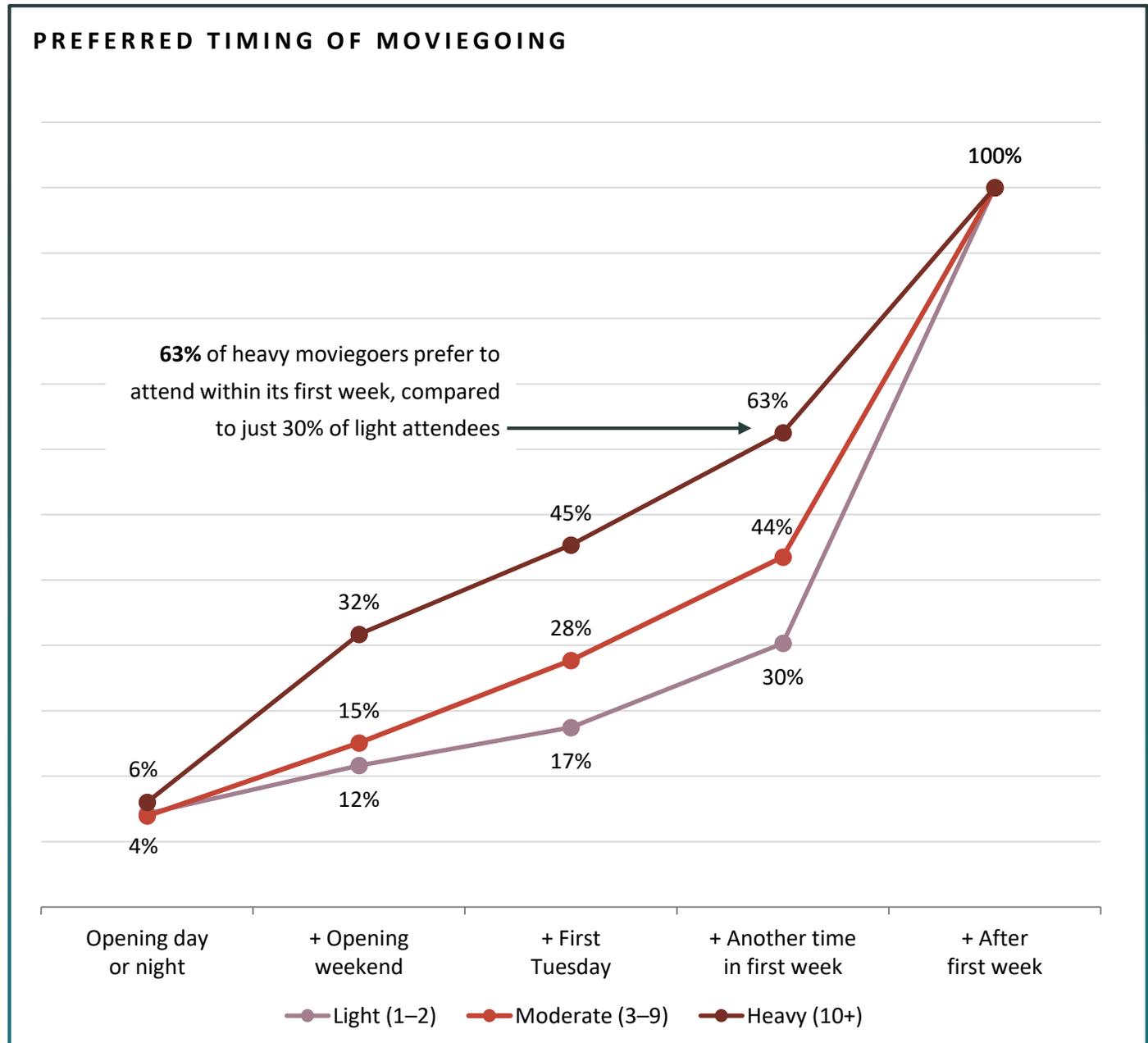


Q. How did your moviegoing attendance in 2019 compare to your attendance in 2018?

Urgency to Attend

Heavy moviegoers are roughly twice as likely to see a movie by the end of its opening weekend than moderate and light moviegoers. While the majority of light and moderate moviegoers attend films after their first week in theatres, the opposite is true among heavy moviegoers. Among this group, nearly two-thirds will see a movie sometime during the first week of its release.

Further proof that heavy moviegoers set the tone on moviegoing is that the timing of their attendance correlates strongly with the box office of wide-release films, which typically earn slightly over a third of their box office on opening weekend.



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



SEEING
MOVIES IN
THEATRES

Top Reasons For Seeing Movies in Theatres

Time and money permitting, many moviegoers prefer to see movies in theatres rather than at home. The following factors stand out as the top reasons to prioritize the experience of a seeing a movie in a theatre, and what makes certain movies a more urgent priority than others.



AN IMMERSIVE EXPERIENCE

The most popular element of the theatre experience is the big screen that creates an immersive atmosphere. Similarly, moviegoers enjoy the surround sound that theatres provide, noting that watching a movie at home does not allow for the same degree of escapism that moviegoers get when they are in the theatre.

“When the goal of a movie is to immerse you in a world, it needs to be seen on the big screen with surround sound.”

– Male, 21; Winnipeg, Manitoba



THE GENRE MAKES IT WORTH IT

Moviegoers feel that seeing movies in theatres is more essential when the movie makes use of extraordinary cinematography or special effects. As such, moviegoers demonstrate greater urgency for seeing action and action-adjacent movies or visually impressive movies on the big screen, expressing that movies with lots of special effects lose some of their shine on a smaller screen.

“When a film has a lot of action scenes, I feel like I get the full experience when I’m at the cinema.”

– Female, 20; Laval, Quebec



A SHARED EXPERIENCE

Many feel that the experience of seeing a movie is heightened by sharing it with others. They enjoy meeting up with friends or making a date night out of a trip to the cinema.

Others make a point to see movies in theatres so they can participate in pop culture conversations. New installments in favourite franchises and critics’ picks lure moviegoers to theatres so they can avoid feeling like they’re missing out on something that is culturally important.

“It’s a must-see if there’s lots of excitement around it, and you want to see it before spoilers come out.”

– Male, 32; New Westminster, BC



STAR POWER

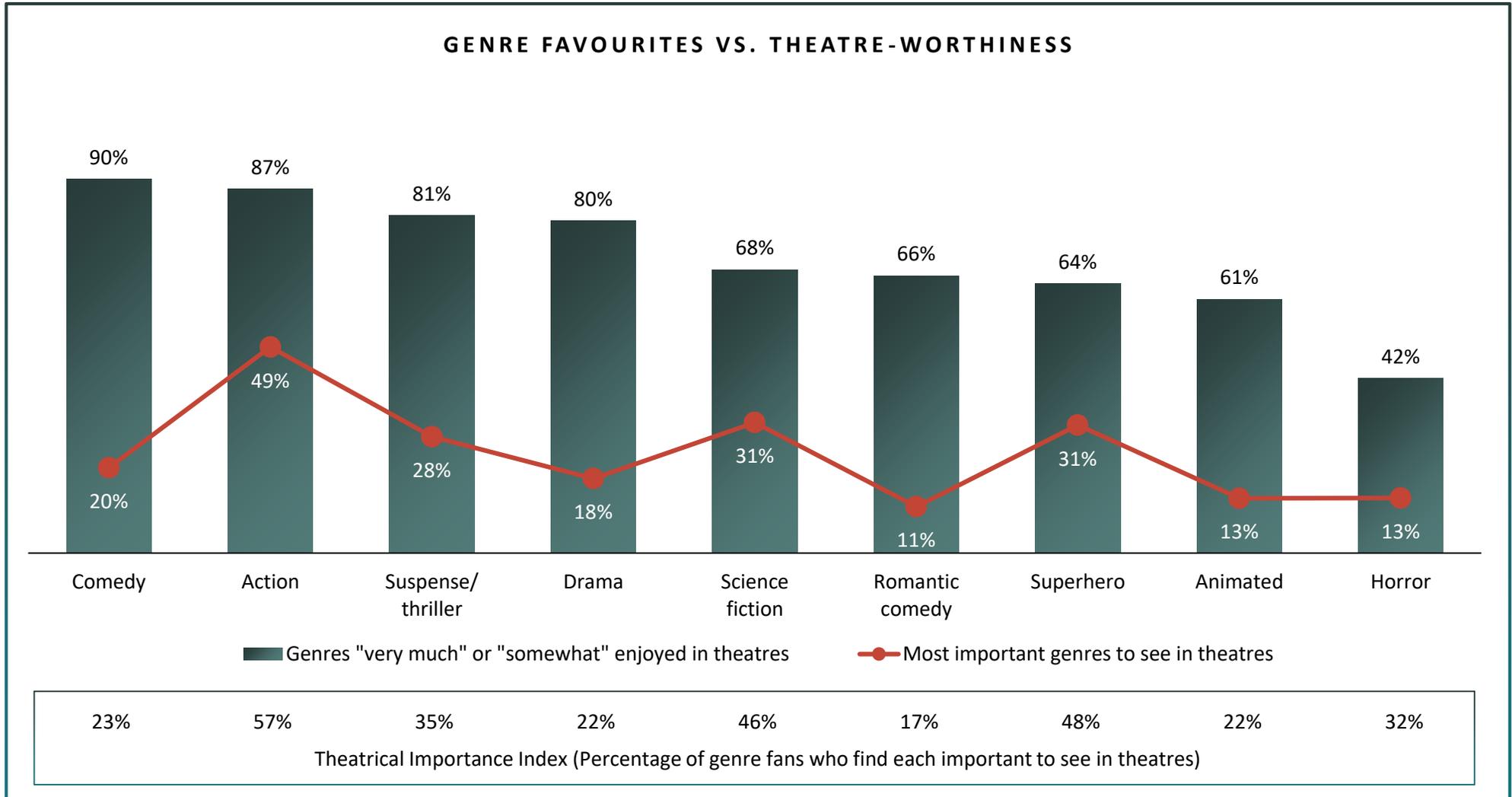
Many moviegoers cite the presence of a favourite actor as a factor that makes a movie a must-see in theatres. The prestige of a movie’s cast can tip the scales for some moviegoers and compel them to see a movie in theatres rather than wait. Oftentimes, the involvement of a renowned actor signifies that the movie will be high quality and worth the price of admission.

“[My decision] is based on the actors and whether they have a reputation for being in really good movies.”

– Male, 36; Brampton, Ontario

Favourite Genres to See in Theatres

Comedy and action movies stand out as moviegoers' favourite genres to see in a movie theatre, followed by, to a lesser degree, suspense/thriller films. However, movies that are considered most important to see in theatres are those that make extensive use of special effects—action, superhero, and science fiction. To this point, 57% of action fans say action movies are important to see in theatres. By contrast, just 23% of comedy fans say the same.



Q. How much do you enjoy seeing the following genres of movies in a theatre? (Only those who selected "very much" or "somewhat" enjoy them are depicted.)

Q. Of the movie genres listed earlier as being your favourites, which do you feel are the most important to see in a theatre?

Learning About New Movies

Word of mouth stands out as the most frequent source of information used to learn about new movies across each avidity segment. As more avid moviegoers are more likely to be exposed to in-theatre trailers, they are more likely to cite them as a source they use regularly, with heavy moviegoers 2.7x as likely as light moviegoers to do so.

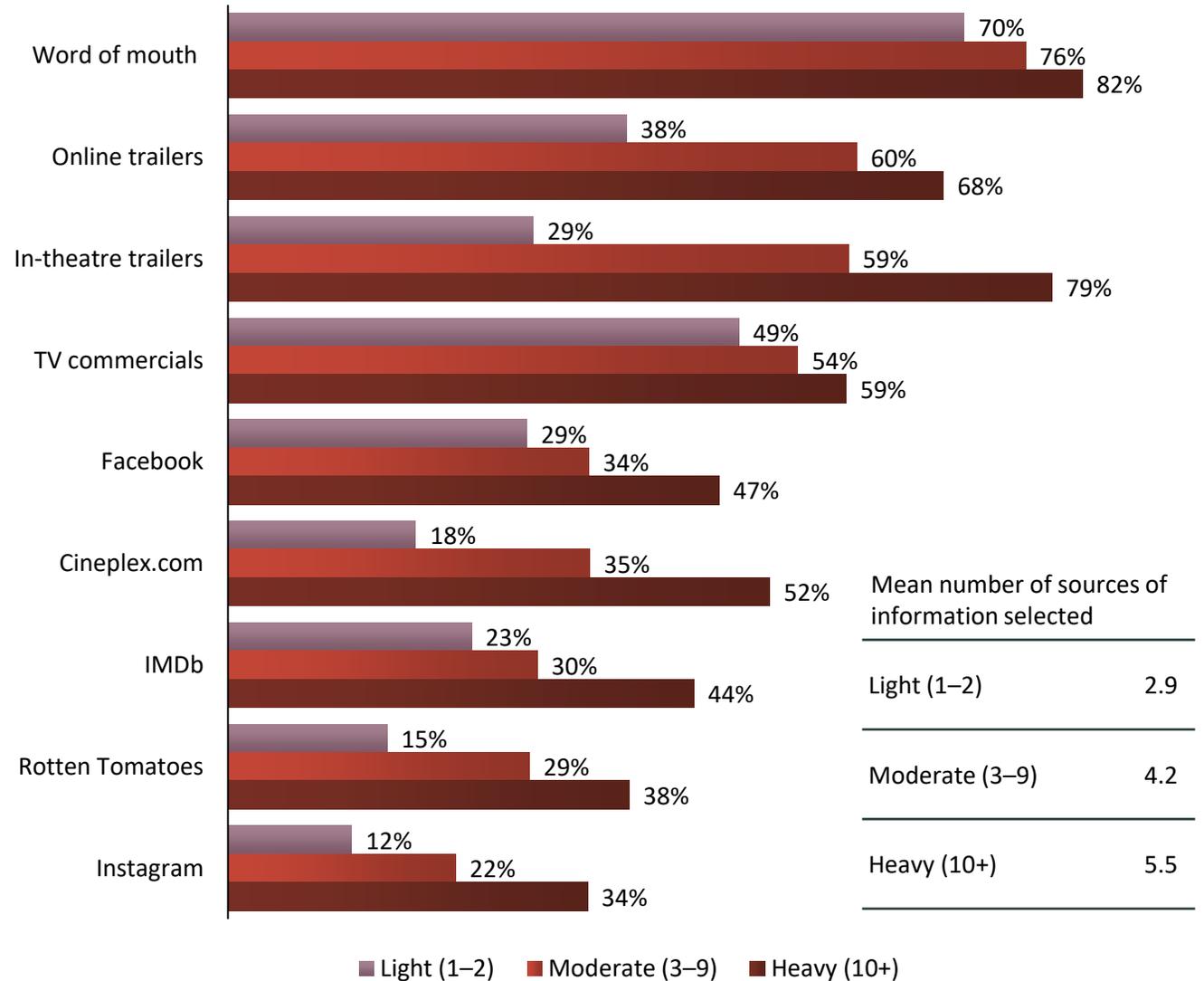
Online trailers are similarly impactful; although there is less of a discrepancy in usage among light and heavy moviegoers than with in-theatre trailers, heavy moviegoers are still considerably more likely to watch them often.

TV commercials are the most common source for light moviegoers to learn about movies outside of word of mouth, reaching half this segment at least somewhat often.

Social media and movie sites like IMDb generate awareness at secondary levels, though are most likely to be used by heavy moviegoers.

SOURCES OF INFORMATION

(Those who answered “very often” or “somewhat often”)



Q. How often do you use each of the following to learn about movies? (Only sources mentioned by at least 20% of total respondents are depicted.)

Importance of Theatre Amenities

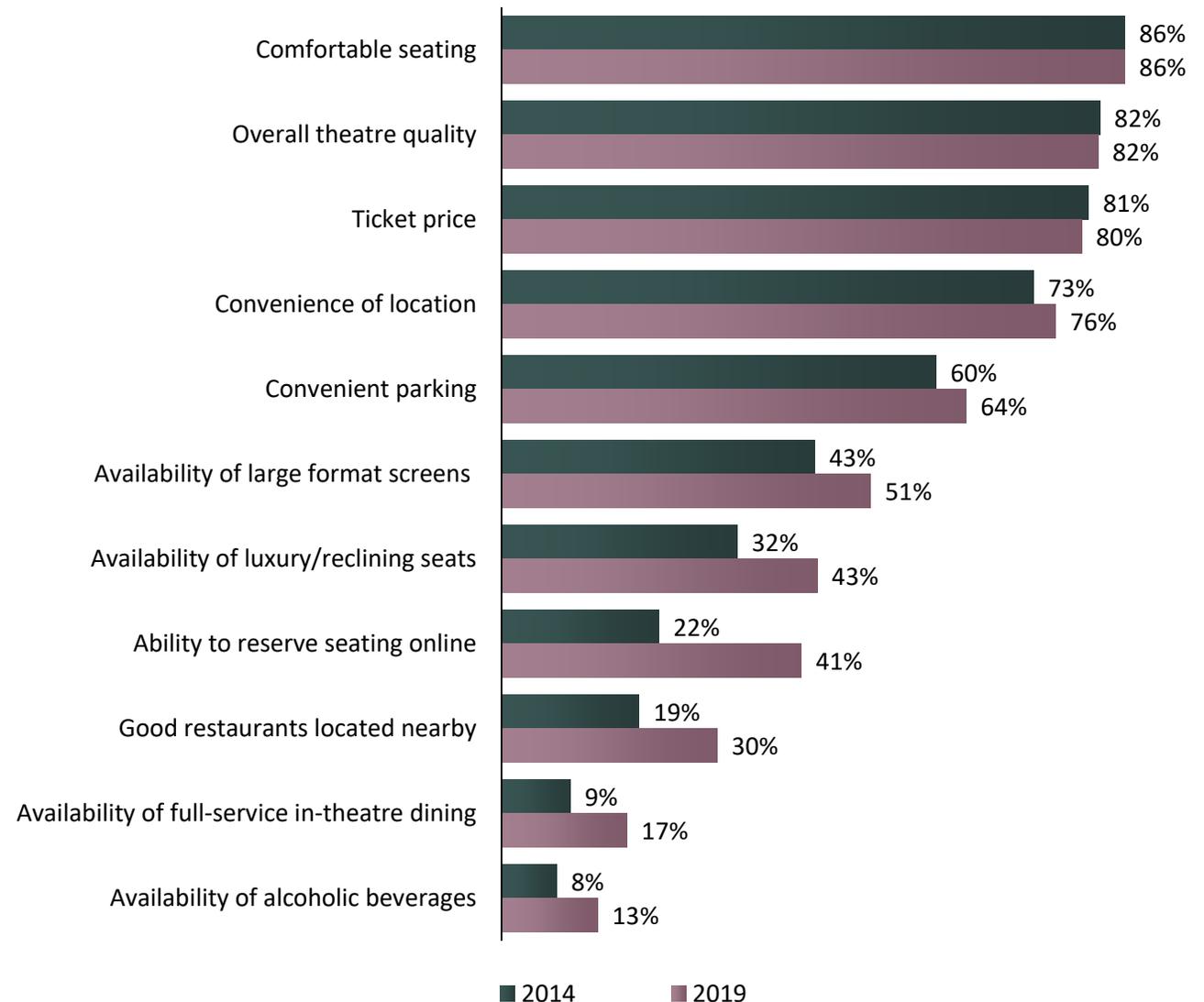
Beyond aspects of the movie itself, moviegoers are driven by comfort, cost, and convenience above all else when deciding where to go to see a movie.

Specifically, comfortable seating, ticket price, and overall theatre quality continue to rank as the top three environmental factors moviegoers consider when choosing to see a movie in a theatre.

Nearly all theatre-related factors remained steady or saw an increase in importance compared to 2014, with the ability to reserve seating online showing the highest increase, with 41% of 2019 moviegoers indicating that it is an important factor, compared to 22% in 2015. Though still a secondary factor, the ability to make online reservations is an important factor among half of all heavy moviegoers— a 19 percentage point increase over 2014 (29%).

IMPACT ON ATTENDANCE

(Those who answered four or five on a five-point scale where five is “very important”)

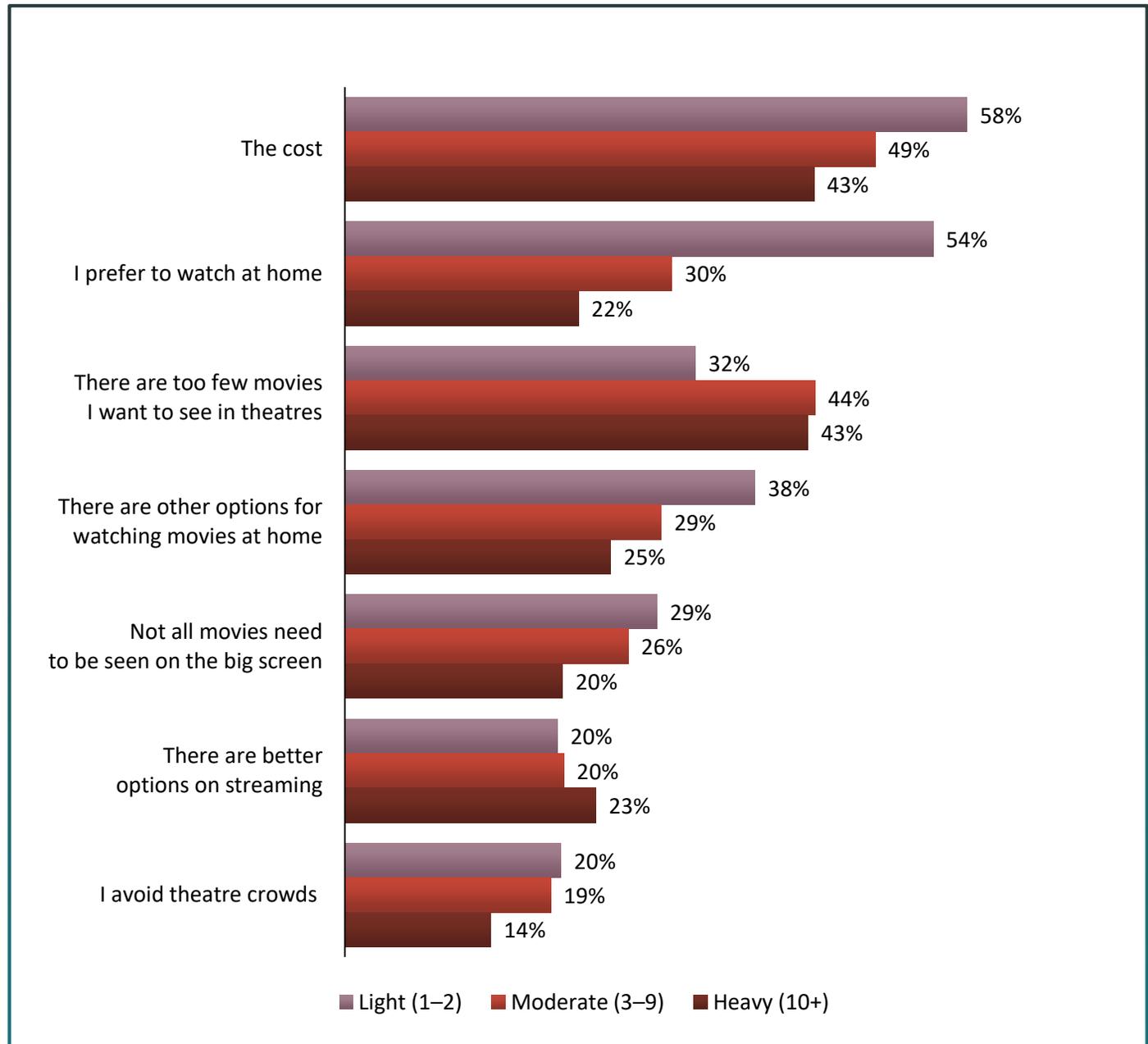


Q. Below is a list of theatre-related factors some have mentioned they consider when choosing to see a movie in a theatre. Please tell us how important each are in your decision on a scale of one to five where five is “very important” and one is “not at all important.”

Barriers to Seeing More Movies in Theatres

The cost of a trip to the cinema remained the top barrier to increased moviegoing, followed by the ability to consume a wide range of content on streaming services in the comfort of one's own home. While many moviegoers prefer the comfort and low-cost of watching movies at home, only one in five agree that there are better options available on streaming services.

To a lesser degree, some moviegoers note that there are too few movies they want to see in the theatres, while others note that not all content justifies the big screen experience.



Q. Below are some reasons others have given as to why they didn't go to see movies in a theatre as much as they used to. Which, if any, apply to you?

WATCHING
MOVIES AT
HOME



Reasons For Watching Movies at Home

The genre and quality of a particular movie has the biggest effect on moviegoers' willingness to go out to the theatre, but other factors such as price, convenience, the option to stream movies, and the chance to avoid the crowds can sway the decision to watch movies at home.



MOVIEGOING CAN BE COSTLY

Some moviegoers feel that going to the movie theatre is too expensive to justify making a habit of it, instead opting to rent or stream movies when they become available at home. The cost of finding childcare is also often a factor in this decision-making process for parents. Therefore, for many moviegoers, watching a movie in a cinema is more of a special occasion.

"Movie theatres are far too expensive. I can buy [the movie] a few months later for less."

– Male, 43; Montreal, Quebec



STAYING HOME IS CONVENIENT

Watching a movie at home allows for a greater degree of flexibility. Many like that they can pause and rewind the movie whenever necessary, allowing them to grab snacks or drinks without missing any of the movie. Additionally, they don't have to adhere to a scheduled showtime when watching at home, allowing busy viewers to watch whenever is most convenient with their schedules.

"[Whether I see a movie in theatres] depends on my schedule and if it is available to watch at a convenient time for me."

– Female, 20; Regina, Saskatchewan



A BROADER RANGE OF CONTENT

For some, there is a general lack of interest in the kinds of films and franchises that are currently hitting theatres. With some prospective moviegoers wary of devoting so much time and money to a movie that's not for them, streaming has emerged as an easier and more accessible form of entertainment.

"There are less movies being released that I am interested in (too many superhero movies). It is easier to stream at home."

– Female, 24; Vancouver, BC



CROWDS CAN BE UNAPPEALING

Reflecting on their typical 2019 moviegoing habits (prior to Covid-19), **some moviegoers noted that the experience of watching a movie in a theatre packed full of people eating their concessions was unappealing.** Those who find large crowds to be irritating tend to express a greater willingness to wait for movies to become accessible from home.

"[My decision] depends on whether the theatre is crowded. I hate big crowds."

– Male, 39; Toronto, Ontario

Watching Movies at Home

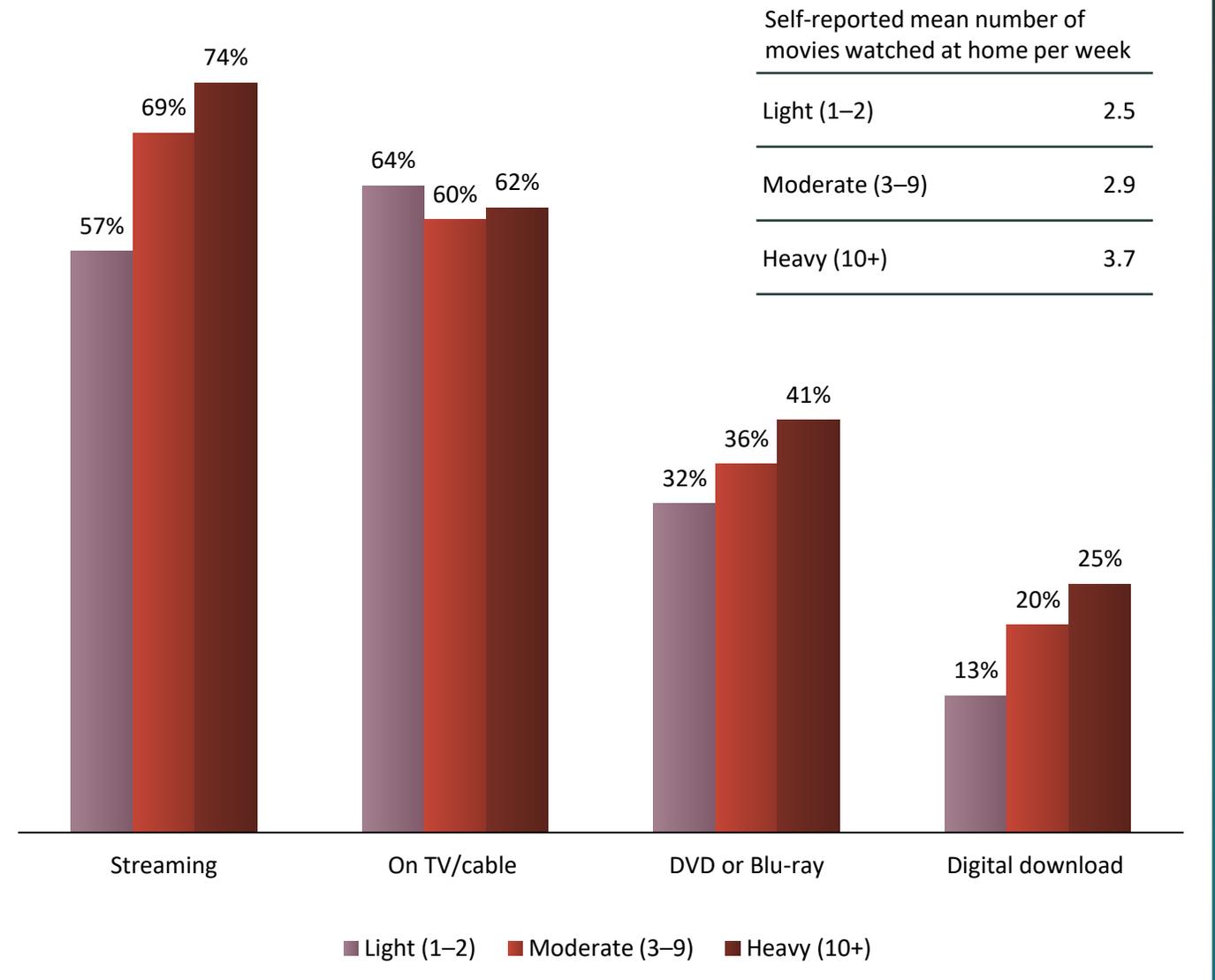
Heavy moviegoers continue to view more films while at home, reporting an average of 3.7 movies watched from home per week.

Moderate and heavy moviegoers are most likely to view films from home through a streaming service, followed by television/cable. Light moviegoers, who also watch the lowest number of films from home on average, are more likely to catch a movie on television/cable, but over half still watch films from home through a streaming service.

DVD or Blu-ray play a more secondary role, used by just over a third of moviegoers.

METHOD OF VIEWERSHIP

(Among moviegoers)



Q. How many movies do you watch at home in a typical week?

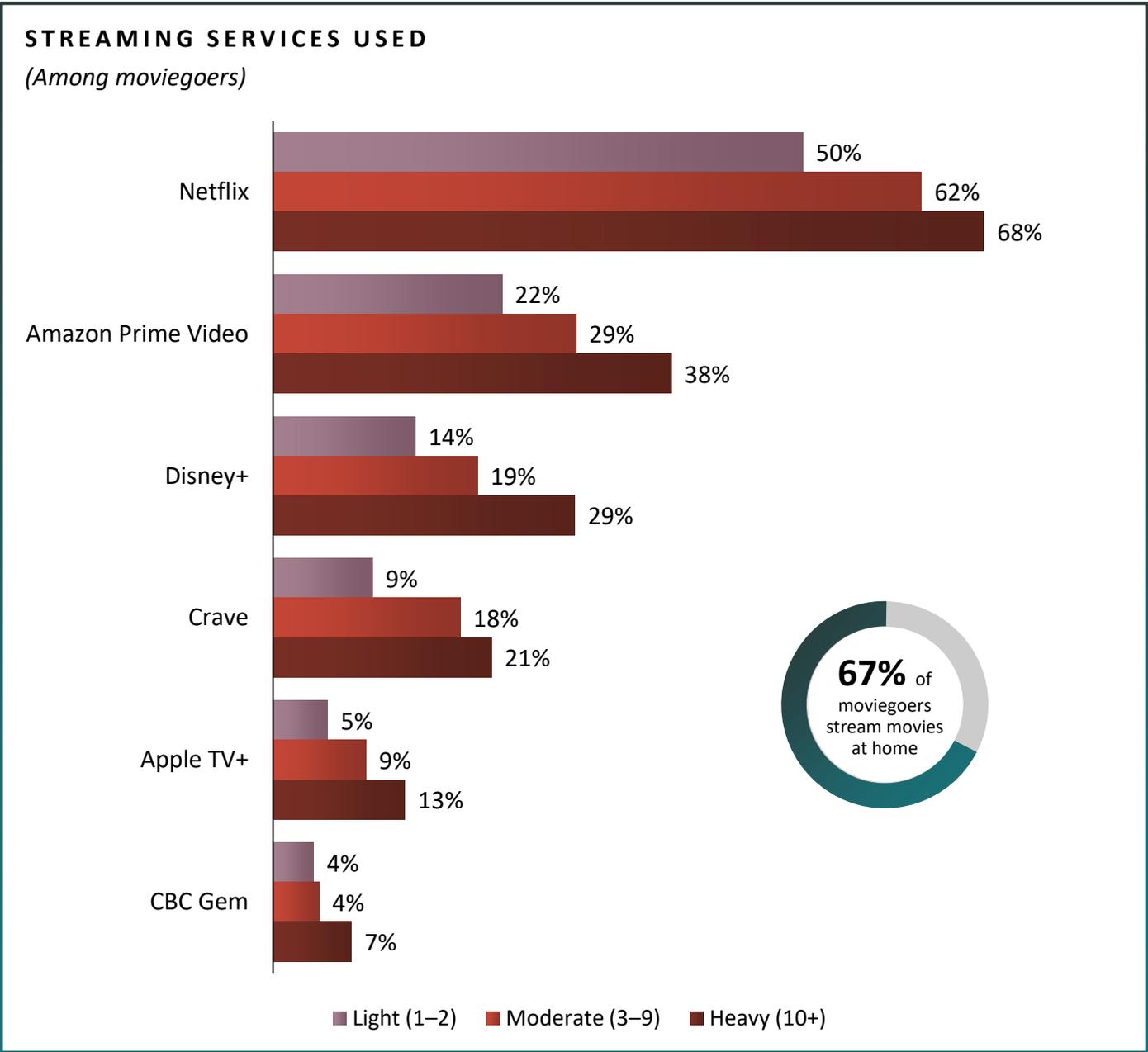
Q. In which of the following ways do you watch movies at home?

Streaming Movies at Home

Two-thirds of moviegoers overall (67%) stream movies at home, including three-quarters of heavy moviegoers, with Netflix in particular and Amazon Prime Video being their platforms of choice.

Netflix is popular among all streamers, with at least half of each moviegoing segment using it to watch movies, rising to over two-thirds of heavy moviegoers.

At lower levels, more than a fifth of heavy moviegoers also use Disney+ and Crave to stream movies.



Q. Which of the following streaming services do you use to stream movies? (Kanopy, Club Illico/illico.tv and ICI TOU.TV were all mentioned by less than 4% of all moviegoers and are not included in the chart.)

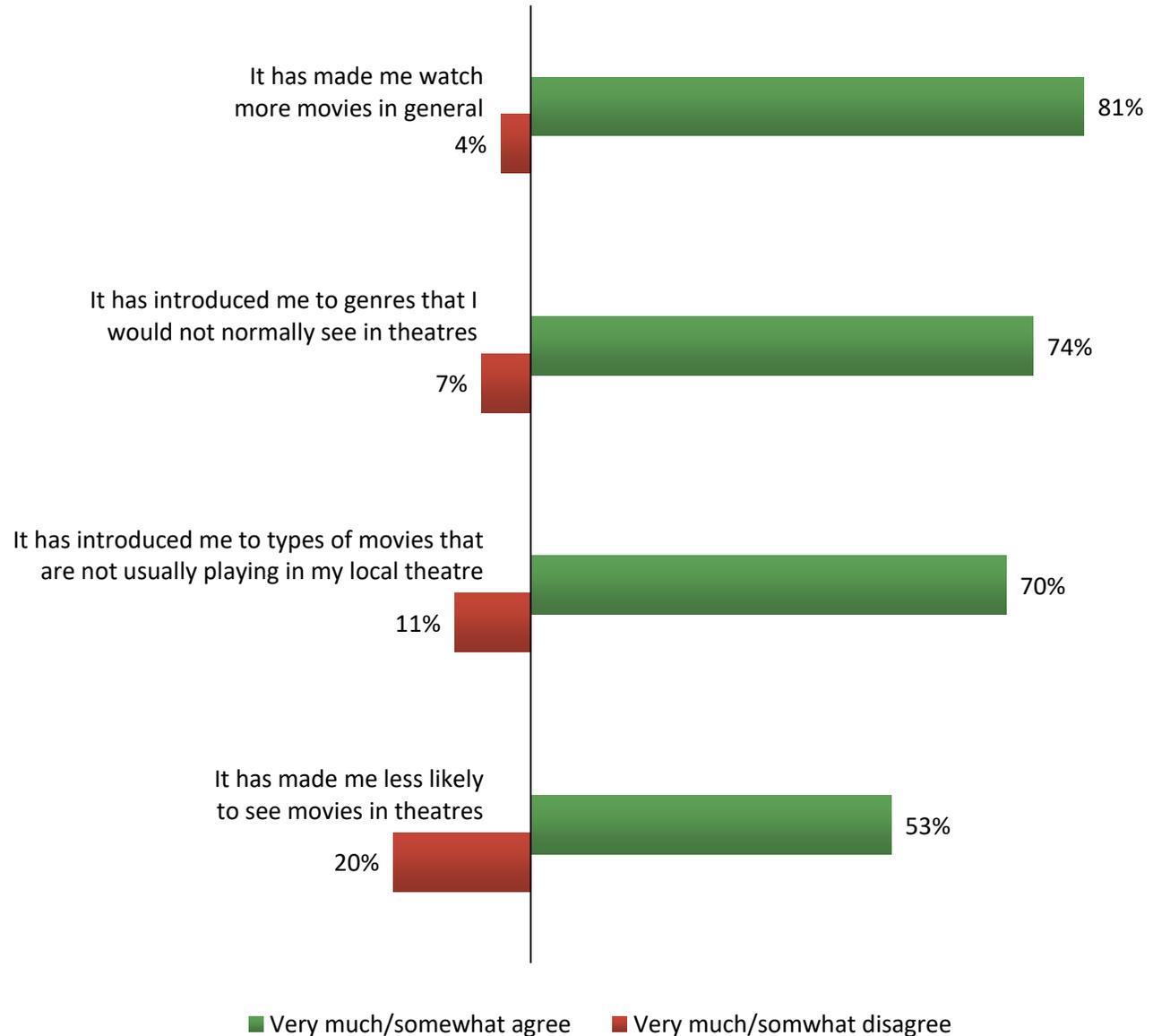
Impact of Streaming on Moviegoing

Most moviegoers agree that streaming has allowed them to view more movies in general, and about three-quarters feel that it has introduced them to genres they would not typically seek out in a theatre.

At similarly high levels, **seven out of ten feel that streaming has introduced them to films that would not typically play at their local theatres**.

While streaming may have increased their overall movie consumption and broadened their moviegoing palate, it has also eroded their likelihood of seeing movies theatrically—over half agree that streaming has made them less likely to see movies in theatres, with moviegoers opting to view from the comfort of their own home instead.

(Among moviegoers. Those with neutral feelings not depicted)



Q. How has streaming movies affected your moviegoing habits and preferences? (very much agree, somewhat agree, neither agree nor disagree, somewhat disagree, very much disagree)

APPENDIX





METHODOLOGY & DEMOGRAPHICS

The study was conducted among an online sample of 1,880 Canadian moviegoers aged 13 and older, comprising 904 men, 968 women, and eight gender diverse individuals.

The study was fielded from April 8 through April 20, 2020. When applicable, comparisons are made to the 2014/2015 study which collected data on moviegoing habits from the period of May 2014 to April 2015.

Prior to analysis, any respondent who did not pass a stringent series of quality control checks was removed from the data set.



WEIGHTING/ADJUSTMENTS

Respondents were qualified as attending at least one movie in the theatre in 2019. The data were weighted to ensure the overall population entering the survey was demographically similar to Canada's overall population.

The survey collected data on the frequency of motion picture attendance in 2019 using the following question: "To the best of your memory, how many movies did you see in a theatre over the twelve months of 2019?"

Given that self-reported attendance/usage frequencies are typically over-estimated by respondents, an adjustment constant was calculated and applied (to the total sample as well as each moviegoer segment) in order to match available 2019 box office data.



MARGIN OF ERROR

The margin of error for the total sample (at a 95% confidence interval) is +/- 2.3 percentage points. Margin of error by segment are below:

REPORT SEGMENTS	Sample Size	Margin of Error
Total Moviegoers	1,880	+/- 2.3
Light (1–2 movies seen in 2019)	512	+/- 4.3
Moderate (3–9 movies seen in 2019)	937	+/- 3.2
Heavy (10+ movies seen in 2019)	431	+/- 4.7
Gender		
Male	904	+/- 3.26
Female	968	+/- 3.15
Age		
13–17	185	+/- 7.2
18–24	243	+/- 6.3
25–34	260	+/- 6.1
35–44	316	+/- 5.5
45–54	281	+/- 5.9
55–64	313	+/- 5.5
65+	282	+/- 5.8



PHOTO CREDITS

PAGE	FILM / COURTESY OF
1	<i>The Body Remembers When the World Broke Open</i> / ARRAY (Top Left)
1	<i>The Song of Names</i> / Elevation Pictures (Top Right)
1	<i>Antigone</i> / Association Coopérative des Productions Audio-Visuelles (Bottom Left)
1	<i>And the Birds Rained Down</i> / Outsider Films, MK2 Mile End (Bottom Right)
3	<i>Jeune Juliette</i> / Films Boutique
4	<i>Run This Town</i> / Elevation Pictures
5	<i>Blood Quantum</i> / Elevation Pictures
6	<i>La Femme de Mon Frère</i> / Metafilms (Les Films Séville)
13	<i>The Grizzlies</i> / Mongrel Media
19	<i>The Hummingbird Project</i> / Elevation Pictures
24	<i>And the Birds Rained Down</i> / Outsider Films, MK2 Mile End
25	<i>Menteur</i> / Cinémaginaire (Les Films Séville)
26	<i>Disappearance of Clifton Hill</i> / Elevation Pictures
27	<i>Goalie</i> / Mongrel Media

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