

January 2013

BC Film Industry Public Perceptions and Support



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➤ Introduction

Background

- The Motion Picture Production Industry Association (MPPIA) is an association that represents the film and television industry in British Columbia. The MPPIA works with government and other bodies to promote the industry's competitiveness and image.
- The association has commissioned public opinion to gain an understanding of how the industry is perceived and supported by the BC public.
- More specifically, the research has been designed to measure:
 - Industry perceptions and its importance to the economy;
 - How the industry is perceived in terms of benefiting residents, businesses and the arts and cultural community;
 - How the industry is believed to impact residents and businesses and how well it compensates those affected by filming;
 - The level of support for/opposition to government incentives; and
 - Awareness of the MPPIA.

Methodology

- A total of 800 on-line interviews were conducted with adults BC residents age 18 and over;
- To ensure the final sample was reflective of the BC adult population, weighting was applied by age within gender and by region to match the most recent Statistic Canada Census data;
- The margins of error at the 95% level of confidence on the total sample is +/-3.5% (larger margin of error on sub-samples);
- Interviewing conducted January 17 to 22, 2013;
- The questionnaire used is appended;
- Detailed computer tabulations have been provided under separate cover

➤ Executive Summary

- A total of 85% of BC residents support encouraging growth of the film industry, which is stronger than support for most other industries measured.
- The large majority, 92%, believes the film industry is at least somewhat important to the province's economy, with six-in-ten who consider it to be 'very' or 'extremely important'. Only 7% feel the industry is unimportant to BC's economy.
- A total of 40% of BC residents know someone who works in the film industry, with the proportion increasing to approximately 50% or more in areas of Metro Vancouver.
- Residents estimate that approximately 27% of BC's population either directly or indirectly benefits from investment and spending that is made by the movie or film industry in BC.
- Moreover, the large majority view the BC film industry as at least somewhat important to having a vibrant and viable arts and cultural community in the province, and consider the industry to be a good corporate citizen.
- Over one-in-four (27%) of BC residents report that they have been positively affected by the film industry in contrast to only 1% who have been negatively affected.
- Approximately one-in-four residents (23%) are aware of the Motion Picture Production Industry Association or MPPIA.
- A total of 83% support provision of government incentives in order to keep and encourage film production in BC, and help it be competitive with Ontario and Quebec. Only 11% are opposed.
- Resident groups that provide the strongest levels of support for incentives include: women, those 35 years of age or over, and Metro Vancouver and Southern Interior residents.

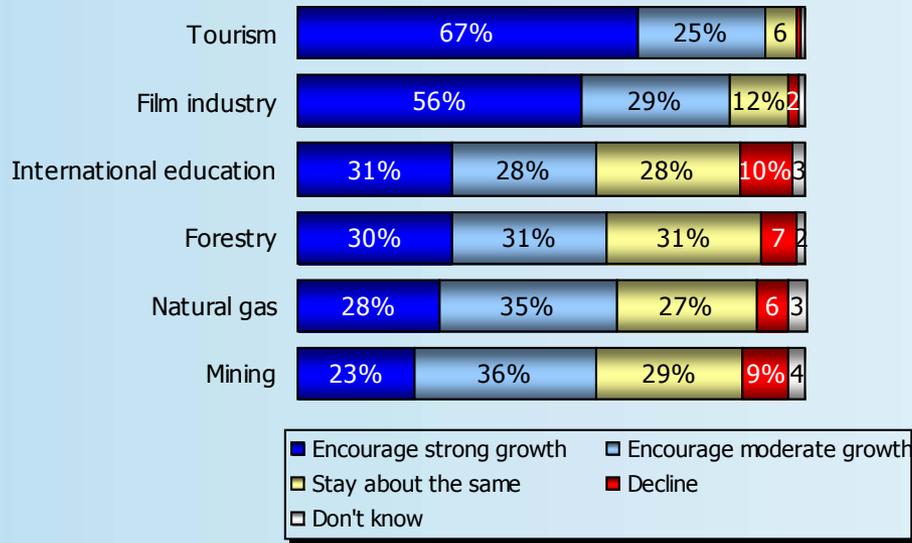


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Key Findings



Support for Industry Growth in BC

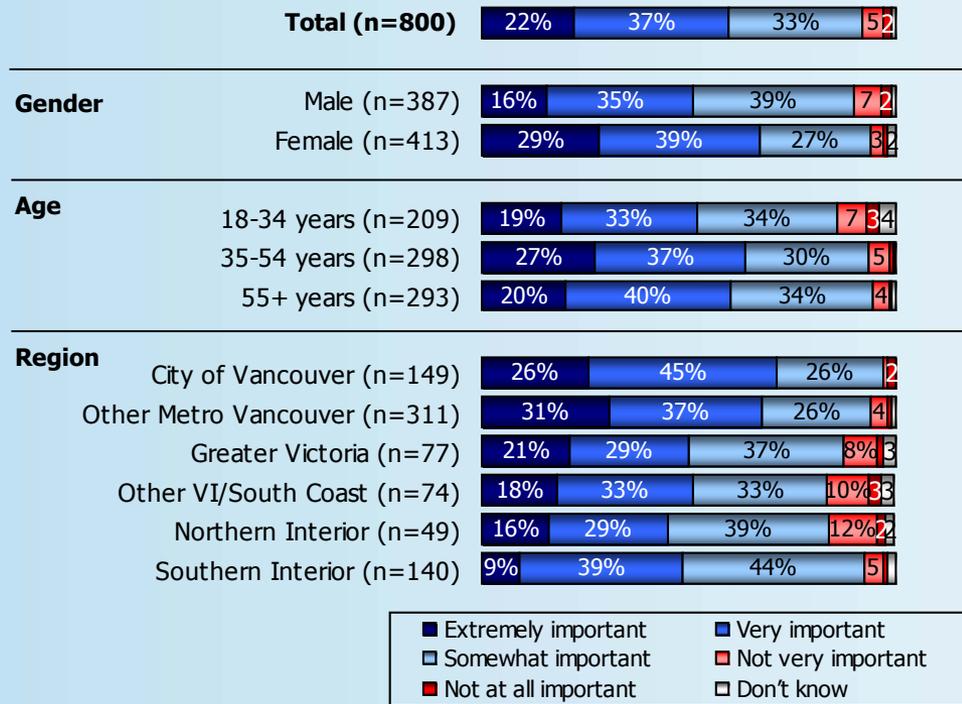


Base: Total (n=800)

Q.1) I'd like you to consider the economic, social and environmental impact of various industries on the province and whether each industry should be encouraged to grow in BC, stay about the same size or decline.

- BC residents are most supportive of encouraging strong growth in the tourism industry, but support for the film industry follows close behind.
- Furthermore, support for encouraging film industry growth is much stronger than for international education, forestry, natural gas or mining.
- A total of 85% support growth of the film industry (56% 'strong' growth) in contrast to approximately 60% for other industries.
- Women and those 35 years of age and over are most supportive of encouraging growth of the film industry. The findings are relatively consistent across the province.

➤ Importance of The Film Industry To BC Economy



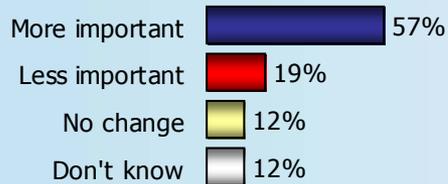
- The large majority of BC residents, 92%, believe the movie or film industry is at least somewhat important to the province's economy, with six-in-ten who consider it to be 'very' or 'extremely important'.
- Only 7% feel the industry is unimportant to BC's economy.
- All demographic segments view the film industry as important. Regionally, Metro Vancouver and Southern Interior residents accord the greatest importance.

Q.2) Overall, how important do you feel the movie or film industry is to BC's economy?



➤ Perceived Impact of Film Industry's Growth

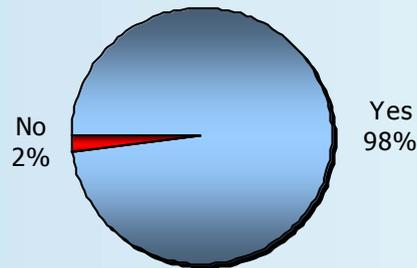
Importance to BC's Economy



Base: Total (n=800)

Q.3) Compared to 10 years ago, has the movie or film industry become more or less important to BC's economy?

Growth Beneficial to BC

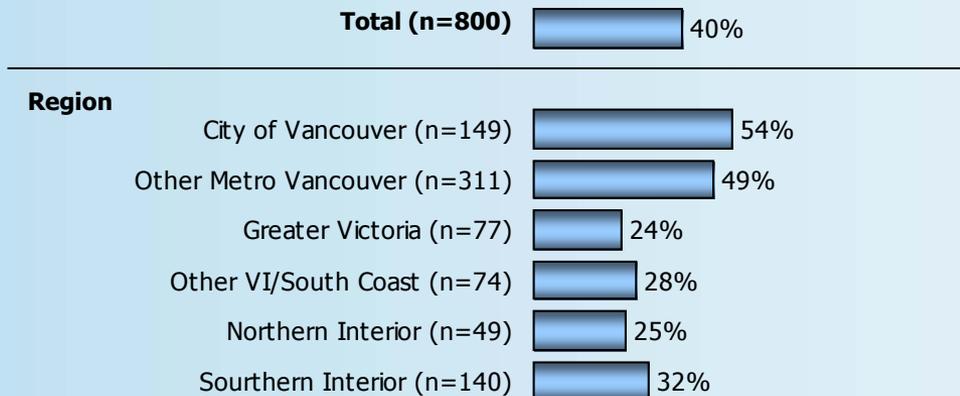


Base: Total state that the movie or film industry has become more important to BC's economy compared to 10 years ago (n=457)

Q.4) IF MORE IMPORTANT: Do you believe the film industry's growth has been beneficial to BC?

- Over half (57%) see the film industry as being more important to BC's economy than it was 10 years ago.
- Furthermore, there is widespread agreement that the film industry's growth has been beneficial to BC.

➤ Estimated Percent of Population Benefiting From Industry



Average percent of population that benefits from film industry in BC = 27.4%

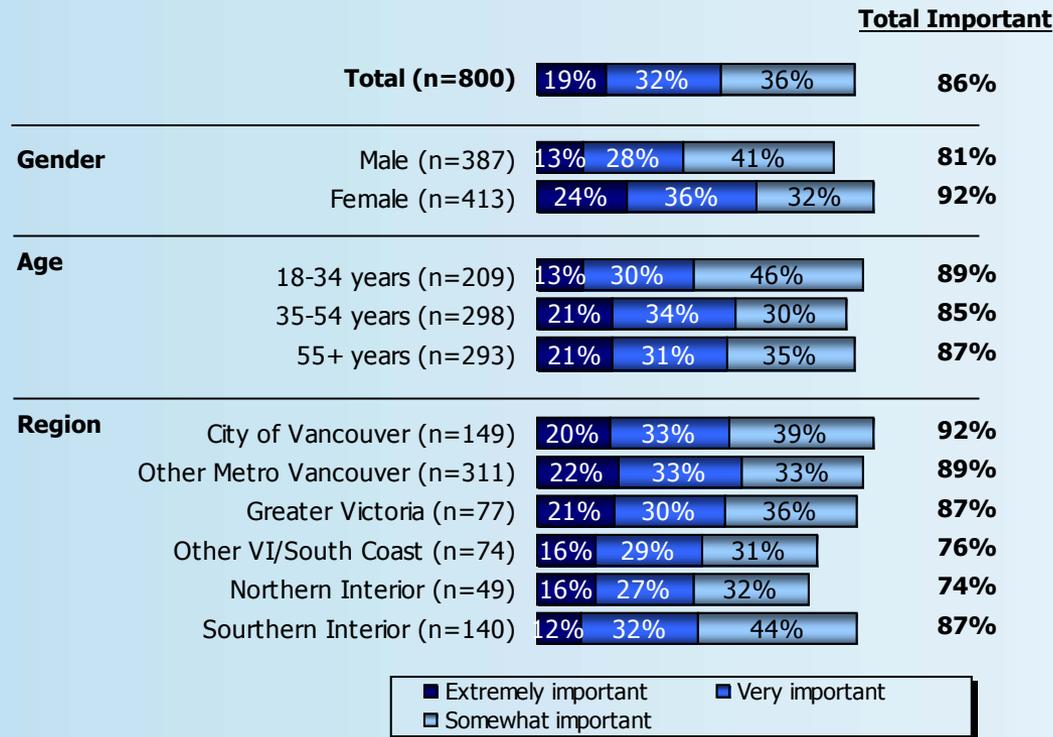
Q.9) Do you yourself, or do you know someone who works in the film industry in BC?

Q.5) Overall, what percent of BC's population do you think benefits, either directly or indirectly, from the investment and spending that is made by the movie or film industry in BC?

- A total of 40% of BC residents know someone who works in the film industry, with the proportion increasing to approximately 50% or more in areas of Metro Vancouver.
- Residents estimate that approximately 27% of BC's population either directly or indirectly benefits from investment and spending that is made by the movie or film industry in BC.
- This average estimate is fairly consistent across the various regions of the province.



➤ Importance of Film Industry to BC's Arts & Cultural Community

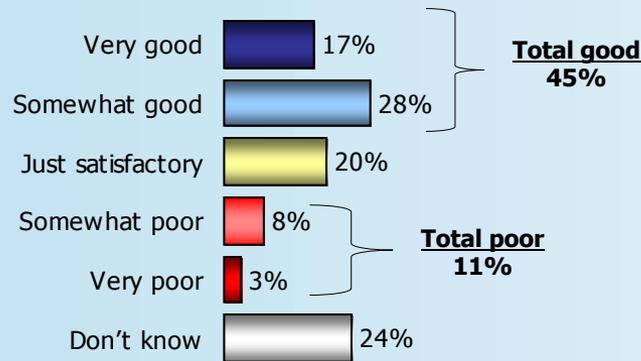


- Furthermore, the large majority of residents agree that the BC film industry is at least somewhat important to having a vibrant and viable arts and cultural community in the province.

Q.6) How important is the BC film industry to having a vibrant and viable arts and cultural community in BC?



➤ Corporate Citizenship of Film Industry



Base: Total (n=800)

Q.7a) And how would you rate the BC film industry in terms of being a good corporate citizen by working with or supporting the community and those less fortunate?

- 45% of BC residents currently consider the BC film industry to be a good corporate citizen. Another 20% say they are satisfactory in this role while only 11% rate them as poor.



➤ Recall Support or Involvement in Community

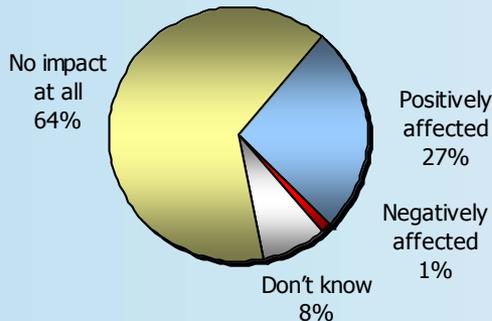
| | Total (800) % |
|--|---------------------|
| Yes | 13 |
| Celebrity support for local charity events/ fundraisers | 2 |
| Donation to local community groups (i.e. community meals, volunteering, clothing) | 2 |
| Support for local arts event/organization/film festival | 2 |
| Food/food bank donations | 1 |
| Economic benefits (i.e. taxes, employment) | 1 |
| Appearance at public events (i.e. sports, celebrations) | <1 |
| Donations to local hospital/medical causes | <1 |
| Support/donations to help the homeless | <1 |
| Cannot recall specific event | 6 |
| No | 88 |

- Just over one-in-ten (13% of BC residents) report that they recall seeing, reading or hearing something about the BC film industry supporting or being involved in the community.
- Activities related to fundraising or support of community groups or events are most commonly cited.

Q.7b) Have you read, seen or heard anything about the BC film industry's support or involvement in the community, such as charitable events or activities? IF YES: What do you recall?



➤ Personal Impact of Film Industry



Base: Total (n=800)

Q.8a) Has the film industry in BC positively or negatively affected you in any way, or has it had no impact at all?



Reasons Positively Affected



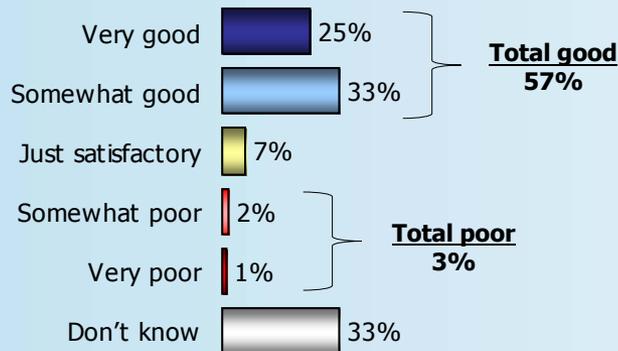
Base: Total state that the film industry in BC positively affected them (n=219)

Q.8b) IF POSITIVELY/NEGATIVELY: In what ways have you been (positively/negatively) affected?

- Over one-in-four (27%) of BC residents report that they have been positively affected by the BC film industry in contrast to only 1% who have been negatively affected.
- The most commonly cited positive effects are economic benefits in general and more specifically employment.



➤ Minimizing Impacts & Compensating Residents & Businesses



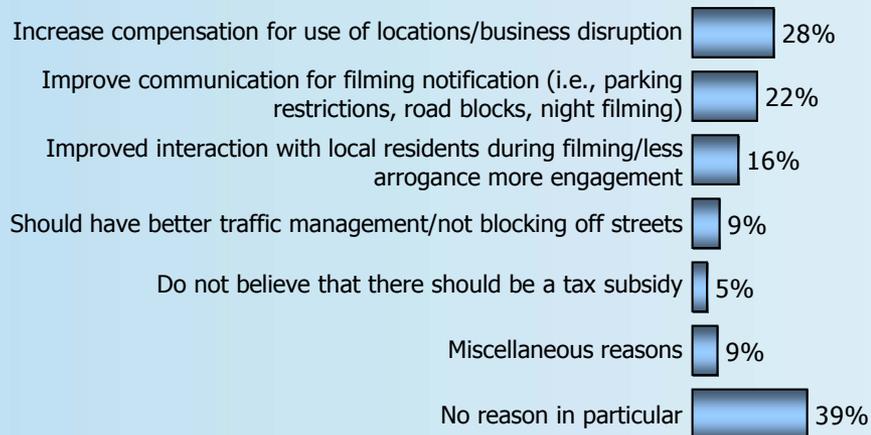
Base: Total (n=800)

Q.10a) What is your perception of how good a job the BC film industry does at minimizing or compensating residents and businesses affected by filming?

- The most common perception among BC residents is that the BC film industry does a good or satisfactory job of minimizing its impact, or compensating residents and businesses affected by filming.
- Specifically, 57% of residents think the industry does a 'very' or 'somewhat' good job and 7% satisfactory, in contrast to 3% who feel it does a poor job.



➤ How Film Industry Could Improve



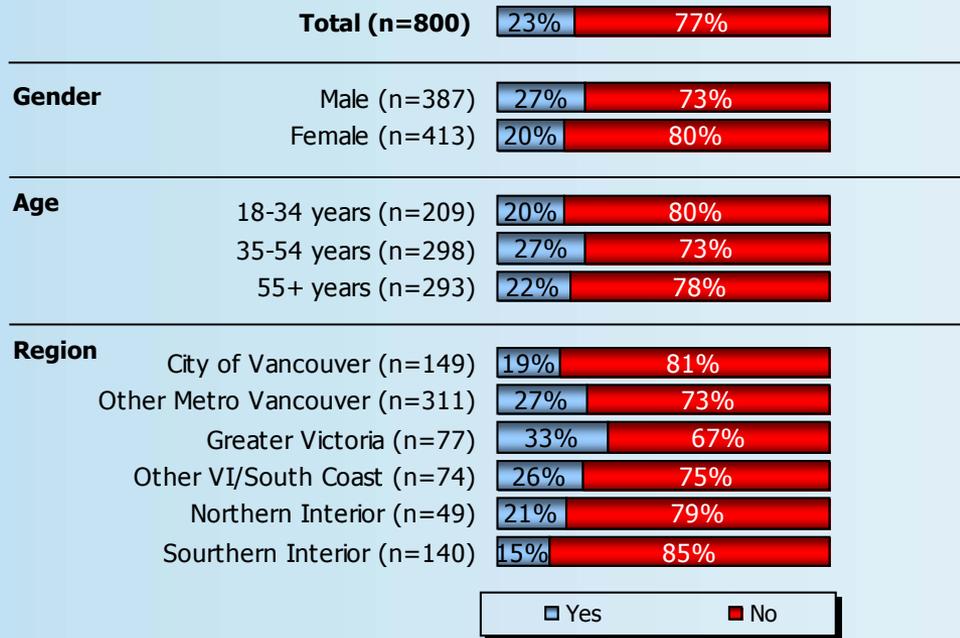
Base: Total state that the film industry in BC does a poor/just satisfactory job of minimizing or compensating residents and businesses affected by filming (n=78)

Q.10b) IF JUST SATISFACTORY OR POOR: How could the film industry in BC do a better job at minimizing or compensating residents and businesses?

- Those who feel the industry does a satisfactory or poor job were asked for suggestions on how to minimize its impact.
- Increased compensation, communication, and interaction with residents during filming are the most common suggestions.



➤ Awareness of MPPIA

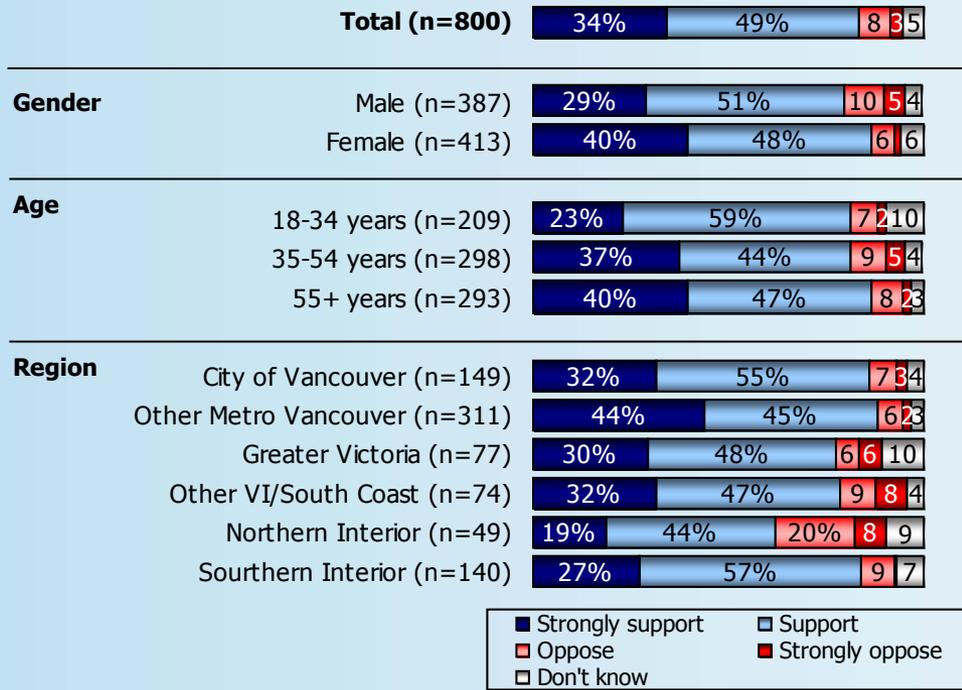


- Approximately one-in-four residents (23%) are aware of the Motion Picture Production Industry Association or MPPIA.
- Awareness is greatest in the urban centres, among males, and among those 35 to 54 years of age.

Q.11) Have you heard of the Motion Picture Production Industry Association or MPPIA?



Support for Government Incentives



- The vast majority of BC residents, 83%, support provision of government incentives in order to keep and encourage film production in BC, and help it be competitive with Ontario and Quebec. Only 11% are opposed.
- Resident groups that provide the strongest levels of support include: women, those 35 years of age or over, and Metro Vancouver and Southern Interior residents.

Q.12) Overall, do you support or oppose BC government providing incentives to the BC film industry in order to keep and encourage film production in BC, and help it be competitive with Ontario and Quebec?



➤ Demographic Profile

| | Total (800) % |
|--|---------------------|
| Gender | |
| Male | 48 |
| Female | 52 |
| Age | |
| 18-24 years | 11 |
| 25-34 years | 16 |
| 35-44 years | 17 |
| 45-54 years | 20 |
| 55-64 years | 17 |
| 65 + | 19 |
| Region | |
| Greater Victoria | 8 |
| Other Vancouver Island/South Coast | 10 |
| Northern Interior (north of Kamloops) | 7 |
| Southern Interior (Kamloops and South) | 22 |
| City of Vancouver | 15 |
| Other Metro Vancouver | 38 |

continued



➤ Demographic Profile

| | Total (800) % |
|---|---------------------|
| Employment Status | |
| Employed | 66 |
| Government/social services/education/healthcare | 21 |
| Construction/trades/engineering | 8 |
| Retail | 5 |
| Banking/finance/investment/insurance | 4 |
| Transportation | 4 |
| Resource (forestry/mining/agriculture/etc) | 4 |
| Personal services | 4 |
| Information/high tech | 3 |
| Manufacturing/processing | 2 |
| Marketing/advertising/media | 2 |
| Arts/entertainment | 2 |
| Legal | 2 |
| Hospitality/restaurant/tourism/hotel | 2 |
| Real Estate | 2 |
| Commercial services | 1 |
| Film industry/film support | <1 |
| Not employed | 34 |
| Retired | 21 |
| Student | 6 |
| Homemaker | 5 |
| Not employed | 3 |



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Questionnaire

2013 MPPIA Province-wide Survey FINAL Jan.16'13

Welcome to today's survey about an important issue of interest. The survey should take less than 10 minutes to complete and all your responses will be anonymous and confidential. Thank you for taking the time to provide your opinions!

Q1. I'd like you to consider the economic, social and environmental impact of various industries on the province and whether each industry should be encouraged to grow in BC, stay about the same size or decline.

SCALE: Encourage strong growth, encourage moderate growth, stay about the same, decline, Don't Know

Tourism
Film industry
Forestry
Mining
Natural Gas
International education

Q2. Overall, how important do you feel the movie or film industry is to BC's economy?

Extremely important
Very important
Somewhat important
Not very important
Not at all important
Don't Know

Q3. Compared to 10 years ago, has the movie or film industry become more or less important to BC's economy?

More important
Less important
No change
Don't Know

Q4. IF MORE IMPORTANT: Do you believe the film industry's growth has been beneficial to BC?

2013 MPPIA Province-wide Survey
FINAL Jan.16'13

Q5. Overall, what percent of BC's population do you think benefits, either directly or indirectly, from the investment and spending that is made by the movie or film industry in BC?

Q6. How important is the BC film industry to having a vibrant and viable arts and cultural community in BC?

- Extremely important
- Very important
- Somewhat important
- Not very important
- Not at all important
- Don't Know

Q7a. And how would you rate the BC film industry in terms of being a good corporate citizen by working with or supporting the community and those less fortunate?

- Very good
- Somewhat good
- Just satisfactory
- Somewhat poor
- Very poor
- Don't Know

Q7b. Have you read, seen or heard anything about the BC film industry's support or involvement in the community, such as charitable events or activities? IF YES: What do you recall?

Q8a. Has the film industry in BC positively or negatively affected you in any way, or has it had no impact at all?

- Positively affected
- Negatively affected
- No impact at all
- Don't Know

Q8b. IF POSTIVELY/NEGATIVELY: In what ways have you been (positively/negatively) affected?

Q9. Do you yourself, or do you know someone who works in the film industry in BC?

2013 MPPIA Province-wide Survey
FINAL Jan.16'13

Q10a. What is your perception of how good a job the BC film industry does at minimizing or compensating residents and businesses affected by filming?

- Very good
- Somewhat good
- Just satisfactory
- Somewhat poor
- Very poor
- Don't Know

Q10b. IF JUST SATISFACTORY OR POOR: How could the film industry in BC do a better job at minimizing or compensating residents and businesses?

Q11. Have you heard of the Motion Picture Production Industry Association or MPPIA?

Q12. Overall, do you support or oppose BC government providing incentives to the BC film industry in order to keep and encourage film production in BC, and help it be competitive with Ontario and Quebec? **Scale: Strongly support, support, oppose, strongly oppose, Don't Know**

Demographics Gender, Age, Region

Industry: Please check the one of the following industries that best fits the type of industry you work in?

- Government/social services/education/healthcare
- Resource (forestry/mining/agriculture/etc)
- Retail
- Hospitality/restaurant/tourism/hotel
- Construction/trades/engineering
- Manufacturing/processing
- Banking/finance/investment/insurance
- Information/high tech
- Personal services
- Arts/entertainment
- Transportation
- Commercial services
- Marketing/advertising/media
- Real estate
- Film industry/film support
- Legal
- Not employed
- Retired/homemaker
- Student