Réseau des exploitants canadiens indépendants

NICE

Network of Independent Canadian Exhibitors

Market Access Barriers

What informs Ontario's independent cinemas' decisions to play Canadian and Ontarian films?

Produced by the Network of Independent Canadian Exhibitors (NICE)
Supported by Ontario Creates through the Business Intelligence Program

September 2026

About this report

This **Market Access Barriers** report was produced by the **Network of Independent Canadian Exhibitors (NICE)**, Canada's industry body for independent film exhibitors, with the support of the **Business Intelligence Program** from **Ontario Creates**.

This report is intended for producers, distributors and other rightsholders working in Ontario's screen sector, and for the exhibitors and policymakers that support their pathway to audiences.

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Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Creates or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.

Confidentiality

Sixteen independent cinemas participated in this study on the agreement of confidentiality. No participating cinema is identified anywhere in this report or its supporting files.

Cover illustration

Julien Balbontin at CONTINUE Agency: continueagency.com

Land acknowledgement

Film exhibition spaces across Turtle Island are on the treaty lands and traditional territories of many Indigenous nations and are important spaces for sharing Indigenous stories of the past, present and future. We make this acknowledgement in the spirit of respect and truth and in recognition of Indigenous sovereignty.

Definitions

Circuit, or chain: A cinema company with multiple locations.

Commitment of shows: The minimum number of daily or weekly screenings that the exhibitor commits to in order to play a title.

Commitment of duration: The duration (in weeks or days) that the exhibitor commits to in order to play a title, higher numbers are usually required by distributors on new releases.

Decision: An exhibitor's choice whether or not to request to play a film.

Distributor: An incorporated company that is able to contract with a theatrical exhibitor to arrange to play a title in their catalogue. Distributors can also be rightsholders.

Exhibitor: Any screen operator that has a relationship with theatrical distributors and shows films to public audiences. This includes brick-and-mortar venues, drive-in theatres and more.

Full shows: A distributor requirement for an exhibitor to play one title in every available show slot on a screen for the duration of its run. No single showtime can be allocated to another title or event.

Majors: In Canada, the major circuits are Cineplex and Landmark. All other cinemas and cinema companies are independent.

Playdate: The commitment to play one film in one or more showtimes in a week; one week of full shows of a film is one playdate, as is one single showtime of a film.

Rightsholder: Any individual or organization that is able to contract with a theatrical exhibitor to arrange to play a title in their catalogue. Rightsholders can also be distributors.

Terms, or the split: The box office revenue share between the exhibitor and the rightsholder.

Zone, or clearance: A geographic exclusivity arrangement under which only one cinema is allowed to play a title in an often ill-defined area.

1. Executive summary

Between February 6 and March 26, 2026, 16 independent cinemas across Ontario recorded their programming decisions around every title they booked and every Canadian film released into that window. This is the first time that data of this kind has been collected in Canada.

The cinemas played an outstanding 223 distinct titles across 648 playdates from 59 different distributors. They also reported on 238 individual booking decisions on 17 Canadian film releases.

The study captured lightning in a bottle for Canadian and Ontarian cinema: *Nirvanna the Band the Show the Movie* was the fourth-highest grossing title across the entire sample, and *Montréal, ma belle* the eighth.

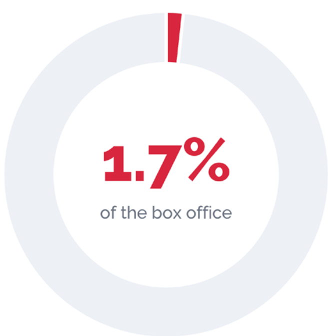
Within this rich mix of quantitative and qualitative data, the study surfaced two key findings: More effective release planning with more transparency could do a great deal to improve the conditions of Canadian film theatrically, but true change requires improved screen access through policy mechanisms.

Why now, and why independent cinemas?

In February 2026, Telefilm Canada reported that Canadian films had fallen sharply at the box office in 2025. According to the report, Canadian titles made up only 1.7% of the total market.

How can we better support Canadian films reaching Canadian audiences?

Canadian films' share of Canada's own box office, 2025

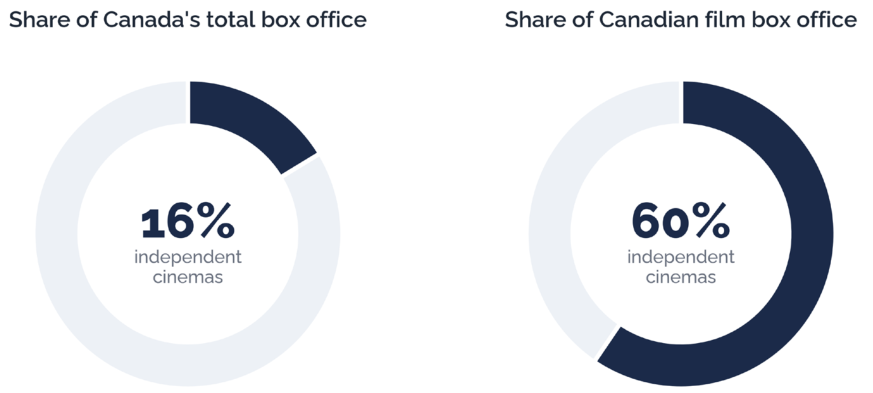


$13.9 million of $836.9 million. Source: Telefilm Canada, 2025 Review.

Canadian film lives at Canadian independent cinemas

Canadian film is roughly 4x more dependent on independent screens than the market as a whole.

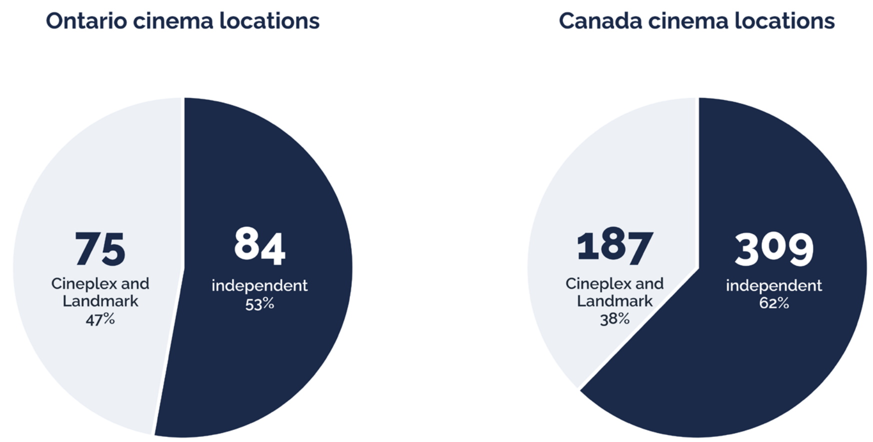
The cinemas examined in this study represent the screens that make up most of Canadian film box office. Their decisions are incredibly important for the performance of Canadian films theatrically.



Canada, 2025. Source: Comscore, supplied to NICE.

Independent cinemas reach more communities

While the major circuits have a greater share of box office, independent cinemas are more diffuse. By their very nature, independent cinemas are unique and often very tuned in to their community.



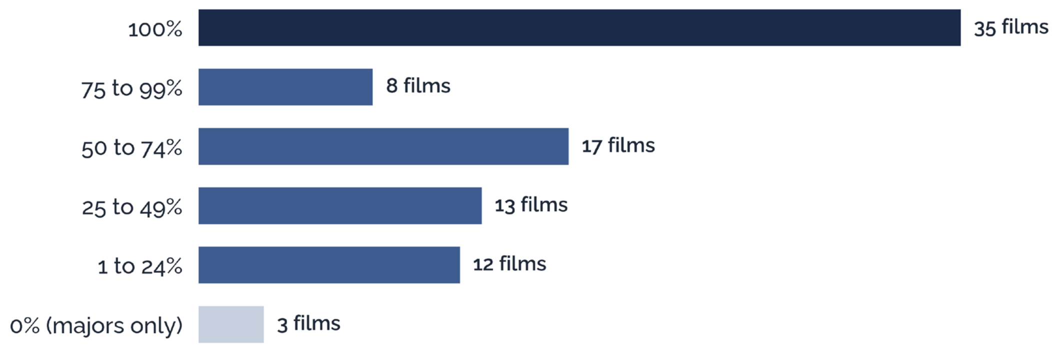
Source: Comscore, screens and locations by region, June 2026.

35 Canadian films in 2025 played only at independent cinemas

When breaking down the total box office on Canadian films between the majors and independent cinemas, it was found that 35 titles relied entirely on being programmed on independent screens.

Thirty-five Canadian films earned every dollar at an independent

88 Canadian films with measured 2025 box office, by share earned at independent cinemas. Source: Comscore.



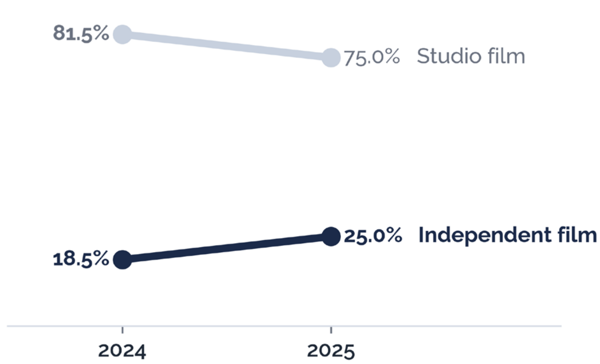
Now is the time for independent films and the cinemas that celebrate them

Canadian films are not Hollywood blockbuster fare. Almost all are what the industry would call independent. Today, the global box office is reporting a surge in the success of independent titles.

Rarely has there been a better moment to investigate barriers for Canadian films and maximize their odds at the box office.

Independent film is taking share

Share of global box office. Source: Indy Film Library, Gower Street Analytics.



+41%

independent film box office, 2025 over 2024

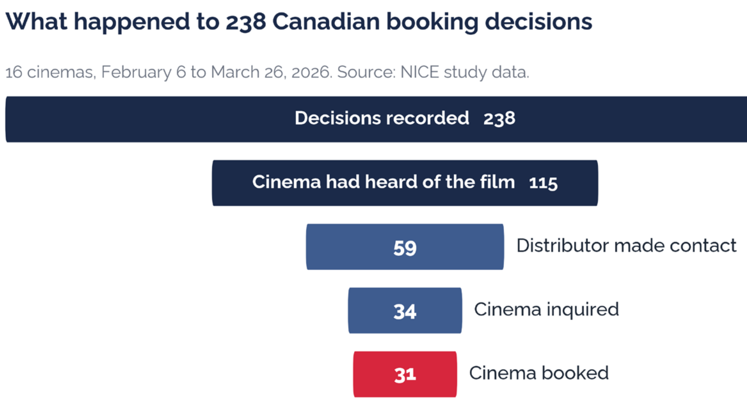
+4%

all box office, same period

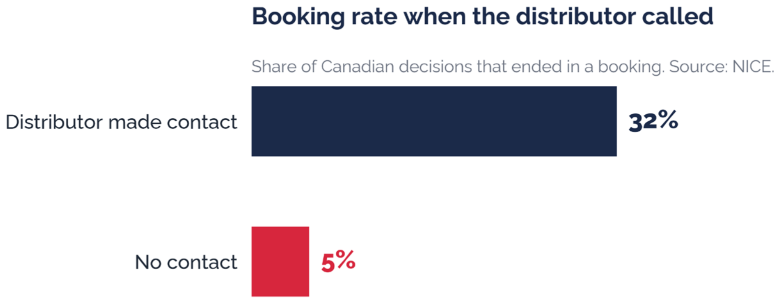
Study results:

Awareness is key

Of the 238 Canadian booking decisions recorded, the cinema had heard of the film in only 115, fewer than half.



Where a distributor made contact about a Canadian title, 32% of decisions ended in a booking. Where no contact was made, only 5% did — in those cases, the exhibitor heard about the film separately and approached the distributor.



All major studio films have very long leads and well-publicized open dates. This is because the studios have learned the importance of time to prepare their P&A (prints and advertising, the nomenclature used to describe the total cost a studio or distributor spends to market and distribute a film).

There is no reason Canadian films should not follow this same practice.

The Canadian Movie Marketplace is an online database of Canadian titles, owned and managed by NICE, that is populated by film rightsholders. It is presently the only central location for exhibitors to discover upcoming Canadian releases. With the awareness gap being so pronounced, a focus on one central source of information for all rightsholders and exhibitors would be of clear and easy benefit.

Pitching and sharing upcoming slates through direct contact with cinemas is very important and should be expanded in addition to the use of the Canadian Movie Marketplace. With long lead times, marketing materials prepared well in advance and bookings made with more of a runway, many of the costs associated with P&A can be reduced.

Full shows take screens off the market

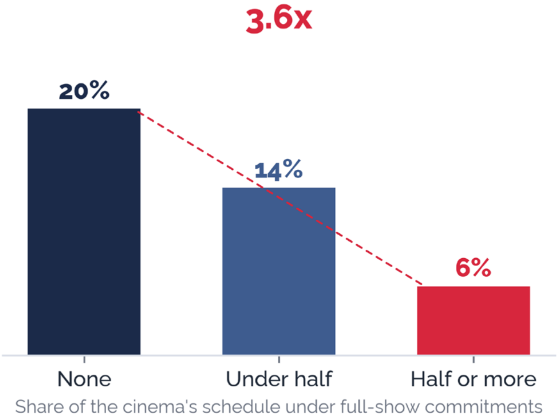
Titles from major studios will often command full shows: the requirement for an exhibitor to play one title in every available show slot on a screen for the duration of its run. No single showtime can be allocated to another title or event. This is especially limiting for single- and two-screen cinemas.

These commitments range anywhere from one to four weeks. Some studios will demand a 'look,' which is the requirement to continue a run of full shows for an additional week to the original agreement, if the film has performed well. The metric for "well" is not always defined, sometimes leaving exhibitors unsure of their own cinema's programming until five or seven days before the 'look' week would begin.

Full shows take screens off the market for Canadian films. A cinema operating without full-show commitments booked Canadian titles at 3.6x the rate of one operating mostly under them.

Full shows take screens off the market

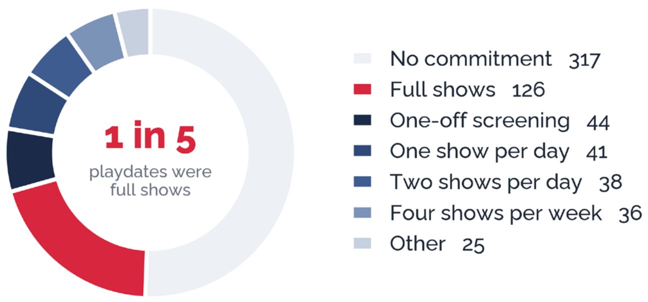
Canadian booking rate by full-show intensity. Source: NICE.



One in five playdates had a full-show commitment

Full-show bookings reduce the chances of Canadian films reaching many communities.

627 playdates with a stated commitment of shows. Source: NICE.



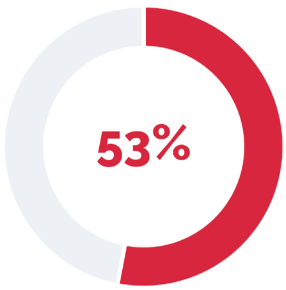
Zone restrictions are rare but present

In many regions across Canada, the distribution of films is limited by 'zones', geographic exclusivity arrangements that usually privilege the biggest player.

Based on NICE correspondence with the international confederation of arthouse cinemas (CICAE) and exhibitor associations in Australia, France, Japan, South Korea, the UK and the US, we have not been able to identify any other country where this practice survives in the digital era.

In this study, zone restrictions appear in 7 of 238 decisions, at four cinemas on three titles.

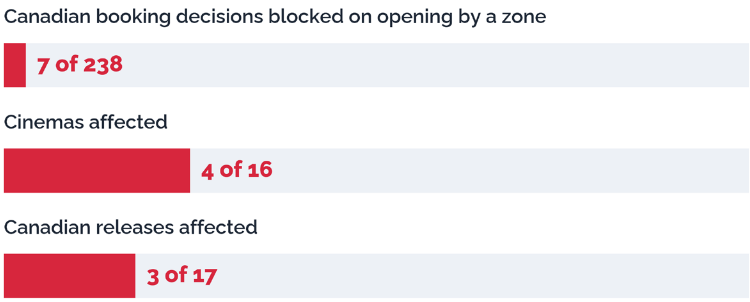
Across Canada



of independent cinemas must clear a Cineplex before they can play a film

NICE survey, 2024

In this study



NICE study data, February to March 2026, Appendix B.4.

Recommendations

Improve screen access: Publish aggregate booking conditions data annually. Ensure full shows and zones do not block Canadian films. Consider a mediation mechanism for access disputes, modelled on France's *Médiateur du cinéma* or Australia's independent Conciliator.

Establish more effective release planning: Establish and publish minimum outreach lead times for Canadian releases. Supply assets, marketing commitment and talent for events early enough to use. Maintain a shared Canadian release calendar using the Canadian Movie Marketplace.

2. Independent cinemas support Canadian film

Before examining how and why independent cinemas book Canadian films, let's look at how much depends on the answer.

Majors and independents in Ontario[1]

Across Canada, the major circuits Cineplex and Landmark claim a large number of screens and the vast majority of the box office. But independents hold the majority of locations.

Ontario is no different. The province has 1,051 cinema screens, with Cineplex and Landmark holding 824 of them. The remaining 227 screens belong to independent operators, and they are numerous: of 159 exhibitor venues recorded in Ontario, independents hold 84.

The importance of theatrical

While there is much posturing around the impact of streaming and changing audience behaviours, the industry has pivoted back to cinemas.

As *Variety* reported in summer 2026: "Studios have mostly embraced a similar point of view and recognize that having movies in theaters raises their profile and enhances their value when they debut on home entertainment platforms. That's led to another important pivot: Companies like Disney, Paramount and Universal have now coalesced around a window of at least 45 days."[2]

For Canadian films with smaller budgets, while the P&A outlay can be costly, there is a strong return on investment in theatrical. Filmoption International holds a theatrical window of at least 60 days on every release, and expanded it to 90 days on *Montréal, ma belle* in order to maximize its impact.

Canadian films need Canadian indie cinemas[3]

In 2025, independent exhibitors held 16% of Canada's total box office. Major circuits held the remaining 84%. In the same year, independent exhibitors accounted for 60% of box office earned by Canadian films in Canada.

Canadian film is roughly 4x more dependent on independent screens than the market as a whole.

The market has rarely been friendlier to independent film. In 2025, while the total box office grew only 4%, independent film box office grew an astonishing 41%[4]. While the studios are recovering, independent films are surging.

That surge has a home in independent cinemas. Indy Film Library, drawing on Gower Street Analytics, observes that, "some cinemas keep prioritizing independent features, as a means of differentiating themselves from the remaining multiplexes."

In Canada, the figures above show where that home is: the venues holding 16% of the total market and 60% of Canadian film box office. The demand for non-studio film is growing faster than any other part of the market, and Canadian films stand to gain the most, if they are empowered to reach all the exhibitors that have an audience for them.

1 Appendix D — Ontario market structure
2 Appendix E — Rubin, Rebecca and Brent Lang. "The Box Office Bounces..."
3 Appendix C — National context: independent share of Canadian film box...
4 Appendix E — Indy Film Library. "Indy box office outpaces studio system with double-digit growth in 2025." 7 January 2026. Data from Box Office Mojo and Gower Street Analytics.

The share of box office across Canadian titles

The aggregate understates the concentration. Of the 88 Canadian films with measured 2025 box office:

Share of box office earned at independents	Films	Combined box office
100%	35	$401,659
75–99%	8	$909,329
50–74%	17	$8,001,483
25–49%	13	$1,582,353
1–24%	12	$640,760
0% — majors only	3	$29,412

Thirty-five Canadian films earned every dollar of their 2025 box office at an independent cinema. For these films especially, the importance of independent cinemas cannot be overstated.

Notes on these numbers

Differing totals: Of 139 Canadian releases covered in Telefilm's report for 2025, as published in February 2026, 88 carry a measured box office total in the source data. The remaining 51 carry no figure and are excluded rather than counted as zero. The 88 total $11.56 million against the $13.9 million Telefilm reports nationally, though the two figures come from different sources, so the $2.3 million difference should not be read as belonging entirely to the excluded 51. What can be said is that the excluded titles are, by definition, films with no measured box office in this source, and films in that condition skew heavily toward independent-only release. Including them would be more likely to strengthen the finding than weaken it.

Majors and independents: Only Cineplex and Landmark are Majors; all other Canadian cinema companies are independent.

3. Methodology

The instrument

Participating cinemas completed a weekly workbook with two sections: The first captured what the cinema actually played per week; and the second captured any decision-making surrounding the Canadian films released per week. See Appendix A for the full list of questions.

Participants and window

Sixteen independent cinemas participated, distributed across Ontario and spanning large urban centres, mid-sized cities, small towns and rural communities. Together, they make up 34 screens and about 7,000 seats. Nine of the 16 participating venues have only one screen. The participants are not identified, for the confidentiality reasons set out at the front of this report. The reporting window ran for seven weeks, from February 6 to March 26, 2026.

Measure	Value
Participating cinemas	16
Reporting weeks	7
Playdate records	648
Playdates with a usable gross figure	622
Total reported gross	$1,199,773
Distinct titles played	223
Distinct distributors	59
Canadian titles tracked	17

Other data sources

NICE interviewed staff from the distributors of the sample's two highest-grossing Canadian titles: Michael Robson, Vice President, Theatrical Sales at Elevation Pictures for *Nirvanna the Band the Show the Movie* and Isabelle Legault, Vice-President Acquisitions & Theatrical at Filmoption International for *Montréal, ma belle*, to set the exhibitor data against the release strategy behind it.

Interviews were also conducted with representatives from national film industry bodies: the Korean Film Council (KOFIC) in South Korea, Japan Community Cinema Center in Japan, the British Film Institute's Film Audience Network (BFI FAN) in the UK, Independent Cinema Office in the UK, Art House Convergence in the US, Independent Cinemas Australia in Australia, and the Association Française des Cinémas d'Art et d'Essai (AFCAE) in France.

This report includes data from Comscore, also known as Rentrak. Comscore is the industry standard source for theatrical results; it supplied NICE with 2025 Canadian film box office by circuit and a June 2026 count of screens and locations by region. Comscore records only the cinemas that report to it.

Desk research was also conducted across a variety of sources, listed in Appendix E.

4. What Ontario's independent cinemas played

Range and concentration

Across seven weeks, the 16 cinemas played an outstanding 223 distinct titles across 648 playdates, 622 of them with a reported gross, sourced from 59 different distributors. Within the films played, the top 10 titles took 44.8% of total gross.

This is reflective of the diversity of participating cinemas: The large number of distinct titles can mainly be attributed to the repertory houses, while the concentration of box office in large titles can be largely attributed to first run cinemas.

Top 10 overall performers

Rank	Title	Gross	Playdates
1	Hamnet	$93,856	41
2	Hoppers	$90,086	18
3	2026 Oscar Nominated Short Films	$78,509	17
4	**Nirvanna the Band the Show the Movie**	**$60,207**	**19**
5	Goat	$53,143	20
6	Sirāt	$48,693	10
7	Wuthering Heights	$44,786	20
8	**Montréal, ma belle**	**$34,624**	**6**
9	Marty Supreme	$24,544	25
10	Project Hail Mary	$24,091	5

Two of the eight highest-grossing titles at Ontario's independent cinemas in this window were Canadian films.

The two films reached the top 10 by different routes. Elevation planned *Nirvanna* as a wide release from the start, "as wide as possible," anchored on the downtown Toronto audience who would recognize the locations on screen, and a strong P&A spend. The rollout included both the majors and independents.

Filmoption took *Montréal, ma belle* on a more grassroots campaign: "We knew we were going to go with just indies, it felt like a more natural fit for the film." The title opened in Montreal, QC, with guest appearances, before moving to popular shows at TIFF Lightbox in Toronto, ON, and VIFF Centre in Vancouver, BC, and on to 38 screens across Canada.

Why cinemas booked what they booked

Reason	Cited in	Share
Strong fit with our audience	182	32.0%
Currently relevant	148	26.0%
Eventized screening (Q&As, series)	119	20.9%
Strong reviews	99	17.4%
Blockbuster expectations	64	11.2%
Star power	63	11.1%
Audience request	48	8.4%
Dominated the market, no competing title	35	6.2%
Current schedule is flexible	24	4.2%

The two leading reasons are judgements about a specific known audience, and the third describes films that had eventizing opportunities.

The reasons independents book a film are reasons a Canadian film can satisfy. A film with a local connection, a director available for a Q&A, a subject that speaks to a specific community, is well-matched to the way these cinemas actually decide.

One playdate in five across the whole sample was an eventized screening. That is the mechanism independents use to turn a small film into a full house, and it needs lead time and assets to execute.

Director Matt Johnson's appearances at various screenings of *Nirvanna* became legendary and an important part of the film's release. "It feels like there was a couple week run where he was just going out every night. It got to the point where people were almost trying to find him, and just be there for when he was there," said Elevation's Michael Robson.

The top response following a pre-release test screening of *Montréal, ma belle* with LGBTQIA+ and Chinese Canadian audiences was: "I have never seen this character on screen." Understanding the importance of representation and connection with audiences, Filmoption focused its communications. Like many films with a smaller P&A budget, the film leaned into its communities who were brought along for the entire journey.

5. What keeps exhibitors from booking

Reason	Cited in	Share
Other films in the market with more audience appeal	77	41.6%
Had not heard about the film	64	34.6%
Screen committed to other title with full shows	44	23.8%
Not a fit for our audience	36	19.5%
Other	9	4.9%
Marketing and publicity commitment from distributor not clear	5	2.7%
New distributor — unsure of their ability to support the film	5	2.7%
Lack of recognizable names	4	2.2%
Not available in a timely manner due to zones	3	1.6%
Trailer and other assets not available with enough lead time	3	1.6%

The field is multi-select, so shares exceed 100%.

Full show restrictions

The first reason, "other films with more appeal," and the third reason, "screen committed with full shows," are two sides of the same decision. Many cinemas will book a major new release because they know it will appeal to their audience, and find that the showtime requirements block them from other titles.

The clearest structural evidence comes from sorting the 16 cinemas by how much of their schedule sits under a full-show commitment, and comparing that against their booking of Canadian titles.

Full-show intensity	Cinemas	Tracked Canadian film booking decisions	Booked	Rate
High (50% or more of playdates)	6	89	5	**5.6%**
Moderate (above 0%, below 50%)	4	59	8	**13.6%**
None (0%)	6	90	18	**20.0%**

A cinema with no full-show commitments booked Canadian titles at 4x the rate of one operating mostly under them.

Not every distributor demands full shows. Elevation, the most active distributor in the sample, describes its strategy with independent exhibitors this way: "As the distributor we need to maximize the number of shows in every market to provide the audience the best opportunity to see the film, especially on release. That said, every film and every location is different, sometimes a full show schedule and a multi-week commitment is not a sustainable model for some theatres. We don't demand all their shows for all films, there are nuances, it's a conversation. We're very cognizant of not choking our partners." The full-show pressure this report measures comes overwhelmingly from non-Canadian, studio product.

While there was a relative lull in new studio product in the years immediately following the COVID lockdowns, the number has been steadily rising. *Variety* reports that "In 2026, there will be 115 to 120 wide releases, which is roughly in line with the 120 films that major studios debuted in 2019 and up from the 94 that Hollywood fielded in 2024." As a greater number of major titles are released, it stands to reason that the demands on indie cinema screens will increase as well.

The reality is that more screen time does not necessarily mean greater box office results. In our sample, we found that *Marty Supreme* made $24,544 over 25 playdates, while the Canadian film *Montréal, ma belle* made $34,624 over 6 playdates. Of note: *Marty Supreme* opened in December 2025 and was well into its run in this reporting period, by which point full shows were rarely required. The comparison is only informative in that it demonstrates that more playdates does not directly correlate with more box office revenue.

Awareness of the slate

The second most-cited reason for not booking a Canadian film is "had not heard about the film." In 112 of 238 decisions, the cinema stated it had never heard of the Canadian film it was being asked about.

Distributor contact	Decisions	Booked	Rate
Distributor made contact	59	19	**32%**
No outreach from distributor	137	7	**5%**

Where a distributor made contact about a Canadian title, 32% of decisions ended in a booking. Where no contact was made, only 5% of decisions ended in a booking – in those cases, the exhibitor heard about the film separately and approached the distributor.

Filmoption used the NICE email group to contact NICE member film exhibitors, made the title available on the Canadian Movie Marketplace, and presented *Montréal, ma belle* at a Distributor Slate Presentation—a quarterly opportunity to pitch upcoming titles to NICE members on Zoom. As a Quebec-based distributor, they were able to do more direct pitching in Quebec where they are more familiar with the market.

Elevation is a very active distributor with about 50 releases per year, a quarter of them Canadian. Michael Robson describes the need to be "in constant dialogue with the indie theatres and bookers, the same way we talk to the majors. Not just calling them up out of the blue when you need something. It is especially important to start early with Canadian movies. Planning for them properly to build awareness at a community level through the theatres while we provide support through targeted marketing and PR efforts."

Through improved email communications and a mutual focus on the Canadian Movie Marketplace between exhibitors and distributors, this simple awareness gap could be reduced.

Zone restrictions

Cinemas that are subject to zone restrictions can only access new films that are not playing in the cinema that is blocking them. For audiences, this can remove the option of going to a cinema they would prefer.

In the 2024 NICE report 'The State of Independent Film Exhibition in Canada,' it was found that 53% of respondents had to clear a Cineplex before they could show a film.

By and large, while zone restrictions sometimes limit independent cinemas' access to new Canadian films, their worst impact is on the health of the film exhibition industry as a whole. Many independent cinemas are routinely disadvantaged in accessing new films, which weakens competition and the ecosystem as a whole.

Zone restrictions appear in only 7 of 238 decisions to book a Canadian film, at four cinemas, on three releases. This is because most of the Canadian titles did not have competition between venues on opening. While the number is low, it is worth noting that even Canadian titles are subject to this antiquated rule.

A century of the same question

In 1931, a federal investigation into Famous Players found that, "Protection in the Canadian motion picture business has been detrimental to the public in that it has cost the public more money, it has prevented large sections of the public from seeing pictures while they are still fairly new and it has given Famous Players and its affiliations an undue advantage over its competitor exhibitors and over the public generally in Canada."

"Protection" was the era's word for clearance, or zones. Testifying for the Exhibitors Co-operative of Canada, Nat Taylor, who decades later co-founded Cineplex, described "unbearable conditions in the film business": "Exhibitors found they had to give long protection periods; some exhibitors were subject to calls from representatives of Famous Players and threatened with extinction. The smaller organizations had to get together to protect their own interests."

A second federal anti-combines investigation in 1982 and 1983 resulted in an agreement that opened first-run films to smaller exhibitors. As Cineplex's Garth Drabinsky said to the *Toronto Star* in 1983: "We now have access to first-run pictures which we didn't have when we opened. That access comes because of an agreement last July between Hollywood's major distributors and Canada's federal anti-combines investigation branch."

The exhibitor that benefited from that ruling is the one whose clearances independent cinemas now largely wait on.

> "Although we are primarily a second-run theatre that gets most new releases well after their initial opening dates, the possibility of being able to open a film day-and-date with the major chains would present a great opportunity to test our viability as a first-run theatre, and whether patrons in [our region] who don't regularly attend our theatre would consider making the switch if they knew we were playing a new release on its opening day."
>
> - Cinema operator and study participant

6. Learnings from other markets

Australia

Australia is the closest structural analogue to Canada, as a mid-sized English-language market. Since 1998, Australia has had a voluntary Code of Conduct for Film Distribution and Exhibition, which Independent Cinemas Australia is involved in administering.[5]

In Australia, distributors must publish upcoming titles and release dates to all exhibitors, there are different minimum screen commitments for cinemas with four screens or fewer, and there is an independent Conciliator who adjudicates disputes to do with exhibition and distribution.

The 2026 report *Made, Not Seen* examines the misalignment between Australian film, cinema and audiences across 123 pages of box office analysis. Its conclusions align with this study's central finding: the gap between what a national industry makes and what its audiences see is exacerbated through issues of screen access and awareness.[6]

France[7]

Two key practices from the French system:

The Médiateur du cinéma: A standing mediation authority for disputes between distributors and exhibitors over access to films.

The ADRC: The Agence pour le développement régional du cinéma supports small-town and rural cinemas with financing for building projects and access to a diversity of films.

The French system is funded partly by a levy on cinema tickets, redistributed to exhibitors through individual support accounts at rates deliberately weighted toward small operators. The system is large and the product of decades of work.

Quebec[8]

Quebec films accounted for 9% of total attendance in the province in 2025. In the English-language market, by contrast, Canadian films took 0.4% of box office in the same year. One figure is attendance and the other box office, but the gap is far too wide to be a measurement artefact.

There are many factors that play a part in this, including language, a star system, a distinct distribution sector, sustained provincial support and audience habit. But importantly, it establishes that a domestic film share far above the current national figure is achievable within Canada, under Canadian conditions.

South Korea[9]

Korea's support for domestic film relies on the Korean Box Office Information System (KOBIS), which connects every box office terminal in the country in real time. The Korean Film Council (KOFIC) collects a 3% ticket levy through this system, funding production, independent cinemas, crew training, R&D and international promotion. Notably, arthouse and independent theatres are exempt from the levy.

5 Appendix E — Film Exhibition and Distribution Code Administration Committee (FEDCAC). Code of…
6 Appendix E — Hayes, Nick. Made, Not Seen: Did We Lose…
7 Appendix E — Centre national du cinéma et de l'image animée (CNC), Exhibitors…
8 Appendix E — Institut de la statistique du Québec, Observatoire de la culture et…
9 Appendix E — Korean Film Council. Korean Film Development Fund and ticket levy.…

7. Recommendations

Improve screen access

1. Publish aggregate booking conditions data annually

Nothing in this report was previously measured. In order to keep track, we must expand the measurements nationally and set industry-wide benchmarks.

2. Full shows should not block Canadian films

Every Canadian cinema that would like to show a Canadian film should not be restricted by their commitment of full shows to any distributor.

3. Zones should not block Canadian films

Every Canadian cinema that would like to show a Canadian film should not be forced to wait for the other cinema in their zone.

4. Consider a mediation mechanism for access disputes, modelled on France's Médiateur du cinéma or Australia's independent Conciliator

In cases where there are disputes surrounding film availability, it would make sense to have a third party adjudicate.

Establish more effective release planning

5. Establish and publish minimum outreach lead times for Canadian releases

Many independent cinemas schedule between four and eight weeks out. In order to reach the audiences of those venues, outreach should arrive well before this scheduling is complete.

6. Supply assets, marketing commitment and talent for events early enough to use

With the importance of eventized screenings and audience awareness reinforced across results, having these items in hand early are critical for box office success.

7. Maintain a shared Canadian release calendar using the Canadian Movie Marketplace

Distributors and exhibitors commit to maintaining and checking the calendar of upcoming Canadian releases on the already-existent Canadian Movie Marketplace.

8. Conclusion

February and March 2026 were halcyon months for Canadian film box office. *Nirvanna the Band the Show the Movie* was the fourth-highest grossing title across every film the 16 participating cinemas played in seven weeks, and *Montréal, ma belle* was the eighth.

This study caught the moment, looking across all the activity created by these larger Canadian titles, amongst a truly stellar slate that also included *Undertone* and *Youngblood*, and recorded the booking decisions being made around them, week by week.

This study set out to determine whether full-show and zone booking requirements limit the ability of Ontario cinemas to book Canadian and Ontarian films. They do. A cinema operating without full-show commitments booked Canadian titles at 4x the rate of one operating mostly under them. While not in significant numbers, some cinemas were also excluded from Canadian films by zone restrictions.

It is imperative for Canada's domestic cinema to have places where Canadians can go see these films. Without any exceptions made for Canadian films around full show requirements and zones, we are inherently losing a significant number of our own screens – and our own audience.

Luckily, on top of these larger structural constraints, an additional finding from this study is easily actionable: Participating cinemas weren't aware of more than half of the Canadian films released in this period, and thus they were not played at those cinemas. Where no distributor made contact, only 5% of decisions ended in a booking. This can be simply remedied through a collaborative effort to keep the Canadian Movie Marketplace up-to-date, with more lead time on marketing materials and special event opportunities.

Appendices and Source List

Appendix A: Method and data notes

A. Workbook information

Participating cinemas completed a weekly two-sheet workbook.

Sheet 1, "Your Screen Reporting" — one row per title per week actually played, capturing:

- Week
- Title
- Distributor
- Date the booking was confirmed with the distributor
- Commitment of shows
- Commitment of duration
- Which week of the run, gross for that title that week net of tax
- Reason(s) for booking
- Free-text comment space

Sheet 2, "Canadian Film Reporting" — one row per Canadian release scheduled that week per cinema, whether or not it was booked, capturing:

- Title
- Open date
- Distributor
- Whether the cinema booked it
- Whether the cinema knew of it
- Whether the distributor made contact
- Whether the cinema inquired
- Whether the cinema was blocked from opening-day play by zones
- Whether it was blocked by an existing full-show commitment
- Opening date for booked titles
- Commitment of shows for booked titles
- Confirmation date for booked titles
- Reason(s) for booking for booked titles
- Reason(s) for not booking for not-booked titles
- Free-text comment space

The reason fields on both sheets are multi-select dropdowns.

Appendix B: Study data tables

B.1 Total data set

Measure	Value
Participating cinemas	16
Reporting weeks	7 (6 February – 26 March 2026)
Title-week playdate records	648
Playdates carrying a usable gross figure	622
Total reported gross	$1,199,773
Distinct titles played	223
Distinct distributors (consolidated)	59
Canadian titles tracked	17
Canadian booking decisions recorded	238

B.2 Awareness and booking

Stage	Count	Share of decisions
Booking decisions recorded	238	100%
Cinema had heard of the title	115	48.3%
Distributor made contact	59 of 196*	24.8%
Cinema inquired	34	14.3%
Cinema booked	31	13.0%

**The distributor-contact question was answered in 196 of 238 decisions.*

Conditional outcomes:

Condition	Decisions	Booked	Rate
Cinema had heard of the title	115	30	26.1%
Cinema had not heard of the title	112	0	0.0%
Distributor made contact	59	19	32.2%
Distributor did not make contact	137	7	5.1%
Cinema inquired	34	23	67.6%

B.3 Full-show intensity and Canadian booking rate

Group	Cinemas	Canadian film decisions	Booked	Rate
High (50% or more of playdates)	6	89	5	5.6%
Moderate (above 0%, below 50%)	4	59	8	13.6%
None (0%)	6	90	18	20.0%

B.4 Per-cinema summary

Cinema	Full-show share	Canadian decisions	Booked	Booking rate	Zone-blocked	Full-show blocked
C03	100.0%	14	0	0.0%	—	14
C14	86.7%	15	0	0.0%	—	15
C10	73.9%	15	0	0.0%	—	—
C06	70.4%	15	1	6.7%	—	3
C08	57.1%	15	3	20.0%	—	1
C11	55.6%	15	1	6.7%	—	9
C04	28.6%	15	3	20.0%	2	—
C13	22.4%	15	3	20.0%	—	—
C07	21.4%	14	0	0.0%	—	—
C16	3.6%	15	2	13.3%	1	4
C01	0.0%	15	4	26.7%	2	—
C02	0.0%	15	2	13.3%	—	—
C05	0.0%	15	4	26.7%	—	—
C09	0.0%	15	3	20.0%	—	—
C12	0.0%	15	1	6.7%	—	—
C15	0.0%	15	4	26.7%	2	—
Total	**19.8%**	**238**	**31**	**13.0%**	**7**	**46**

B.5 Reasons a Canadian title was not booked

Multi-select. Counted across the 185 not-booked decisions carrying a stated reason.

Reason	Cited in	Share
Other films in the market with more audience appeal	77	41.6%
Had not heard about the film	64	34.6%
Screen committed to other title with full shows	44	23.8%
Not a fit for our audience	36	19.5%
Other	9	4.9%
Marketing and publicity commitment from distributor not clear	5	2.7%
New distributor — unsure of their ability to support the film	5	2.7%
Lack of recognizable names	4	2.2%
Not available in a timely manner due to zones	3	1.6%
Trailer and other assets not available with enough lead time	3	1.6%

B.6 Reasons a title was booked

Multi-select, across 569 playdates carrying a stated rationale.

Reason	Cited in	Share
Strong fit with our audience	182	32.0%
Currently relevant	148	26.0%
Eventized screening (Q&As, series)	119	20.9%
Strong reviews	99	17.4%
Blockbuster expectations	64	11.2%
Star power	63	11.1%
Audience request	48	8.4%
Dominated the market, no competing title	35	6.2%
Current schedule is flexible	24	4.2%

B.7 Commitment structure

Commitment of shows (playdates)

Commitment	Playdates
None	317
Full shows	126
One-off screening	44
One show per day	41
Two shows per day	38
Four shows per week	36
Other	25

Commitment of duration (playdates)

Commitment	Playdates
No commitment	321
One week	122
Two weeks	114
Three weeks	31
Four weeks	9

B.8 Week by week

Week	Playdates	Gross	Canadian decisions	Booked
6–12 February	96	$136,113	31	0
13–19 February	94	$243,192	31	14
20–26 February	78	$177,837	48	4
27 February – 5 March	89	$166,837	46	4
6–12 March	87	$177,241	48	1
13–19 March	89	$158,155	16	2
20–26 March	89	$140,399	16	4

Appendix C: National context: independent share of Canadian film box office

Source: Comscore Canadian film box office data for 2025, supplied to NICE.

C.1 The headline relationship

Measure	Value
Independent share of Canada's total box office, 2025	16.3%
Major-circuit share of Canada's total box office, 2025	83.7%
Canadian film box office earned at independents, 2025	$6,886,692 — **59.5%**
Canadian film box office earned at majors, 2025	$4,480,606 — 38.7%
Total Canadian film box office in the dataset	$11,564,997
Over-representation factor	**3.64×**

C.2 Dependence on independent screens, by film

Share of box office earned at independents	Films	Combined box office
100%	35	$401,659
75–99%	8	$909,329
50–74%	17	$8,001,483
25–49%	13	$1,582,353
1–24%	12	$640,760
0% (majors only)	3	$29,412

C.3 Notes on the national figures

- **Differing totals:** Of 139 Canadian releases covered in Telefilm's report for 2025, as published in February 2026, 88 carry a measured box office total in the source data. The remaining 51 carry no figure and are excluded rather than counted as zero. The 88 total $11.56 million against the $13.9 million Telefilm reports nationally, though the two figures come from different sources, so the $2.3 million difference should not be read as belonging entirely to the excluded 51. What can be said is that the excluded titles are, by definition, films with no measured box office in this source, and films in that condition skew heavily toward independent-only release. Including them would be more likely to strengthen the finding than weaken it.
- **Quebec weighting:** Several of the highest-grossing Canadian titles of 2025 are Québécois French-language films, and Quebec has both a distinct exhibition landscape and a domestic audience for domestic film that no other province matches.
- **Majors and independents:** Only Cineplex and Landmark are Majors; all other Canadian cinema companies are independent.

Appendix D: Market structure

Source: Comscore, screens and exhibitor locations by region, supplied to NICE, June 2026.

Screens and locations, Ontario and Canada

Measure	Ontario	Share	Canada	Share
Total screens	1,051	—	2,815	—
Majors screens	824	78.4%	1,902	67.6%
Independent screens	227	21.6%	913	32.4%
Total exhibitor locations	159	—	496	—
Majors locations	75	47.2%	187	37.7%
Independent locations	84	52.8%	309	62.3%

Majors are Cineplex and Landmark; every other cinema company is counted as independent.

Appendix E: Desk research

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