UNDERSTANDING AND ENGAGING WITH AUDIENCES

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TELEFILM CANADA

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SODEC
Québec

nielsen
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## Qualitative Research
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BACKGROUND, OBJECTIVES AND METHODOLOGY
BACKGROUND

Telefilm Canada is a federal cultural agency dedicated to the cultural, commercial and industrial success of Canada’s audiovisual industry and supports dynamic companies and creative talent, providing financial support to Canadian film projects and promoting Canadian audiovisual success and talent at festivals, markets and events.

In the context of rapidly changing audience behaviour, Telefilm began collecting audience data in 2012 to provide market intelligence to industry stakeholders regarding Canadian consumption of media content and to track trends.

Throughout this process, Telefilm has partnered with other funding agencies and research groups to fund and make studies widely available. This study was financed in partnership with the Canada Media Fund (CMF), the Ontario Media Development Corporation (OMDC), the Société de développement des entreprises culturelles (SODEC) and Creative BC.

For any questions, please contact SR@telefilm.ca.

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 CMF, the OMDC, the SODEC and Creative BC. The funders are in no way bound by the recommendations contained in this document.
OBJECTIVES

The objectives of this study include:

• Helping the industry understand film and television consumption habits on a variety of screens and media, as well as identify any emerging content trends;
• Optimizing Telefilm’s Segmentation Model so that it can be better used by the industry to elaborate marketing and communication strategies.
METHODOLOGY

• This survey was conducted by Nielsen via online (CAWI) methodology in English and French between May 27th and June 10th, 2016.

N=3,010 Canadian Residents

• In order to qualify for the survey, respondents were screened based on the following criteria:
  • Age (must be at least 15 years of age or older); and
  • Region (must be a resident of the regions we cover).

• The survey took an average of 19 minutes to complete.

• Language quotas based on Canadian demographics were applied inside and outside of Quebec to ensure proper representation.

• Data presented throughout this report has been weighted by age, gender and region to match the distribution of the demographics in Canada.

<table>
<thead>
<tr>
<th>NUMBER OF COMPLETED INTERVIEWS BY REGION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlantic</td>
</tr>
<tr>
<td>Quebec</td>
</tr>
<tr>
<td>Ontario</td>
</tr>
<tr>
<td>Man/Sask</td>
</tr>
<tr>
<td>Alberta</td>
</tr>
<tr>
<td>BC</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>
**DEMOGRAPHICS**

**GENDER**

- 51% Female
- 49% Male

**AGE GROUPS**

- 15 - 34: 32%
- 35 - 54: 33%
- 55+: 35%

**REGION**

- BC/Terr.: 14%
- Alberta: 11%
- Man/Sask: 7%
- Ontario: 39%
- Quebec: 23%
- Atlantic: 7%

**EDUCATION**

- HS or less: 24%
- College: 34%
- University: 32%
- Postgraduate degree: 10%

**EMPLOYMENT**

- Full-time: 37%
- Part-time: 11%
- Unemployed: 8%
- Self-Employed: 6%
- Stud./Ret./Home.: 37%

**INCOME**

- Less than 40K: 30%
- 40K to under 80K: 35%
- 80K to under 100K: 14%
- 100K to under 120K: 8%
- 120K and Above: 13%
KEY FINDINGS & RECOMMENDATIONS
CONTENT CONSUMPTION OF CANADIANS IS AVID AND OF ALL KIND

91% watch movies
94% watch TV shows
74% watch non-traditional videos (such as YouTube videos, web series, shorts)
67% watch documentaries

53% of Canadians watch TV shows at least once a day
50% of Canadians watch movies at least once a week

TV & NON-TRADITIONAL VIDEO ATTRACTING MORE FREQUENT VIEWERS AND GAINING MOMENTUM COMPARED TO THE PAST YEAR

<table>
<thead>
<tr>
<th>Proportion of frequent viewers by content</th>
<th>TV Shows</th>
<th>Non-traditional videos</th>
<th>Movies</th>
<th>Documentaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Shows</td>
<td>53%</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-traditional videos</td>
<td>27%</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Movies</td>
<td></td>
<td></td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Documentaries</td>
<td></td>
<td></td>
<td></td>
<td>6%</td>
</tr>
</tbody>
</table>

Increase of content watched compared to past year

- TV Shows: +13% 
- Non-traditional videos: +15%
- Movies: +3%
- Documentaries: +2%
DESPITE A MAINSTREAM & TRADITIONAL WAY TO WATCH CONTENT, CANADIANS EXPLORE ALTERNATIVE OPTIONS DRIVEN BY AN INCREASED QUALITY & ACCESSIBILITY

Content viewing is a more personal, introverted & “cocooning” experience.

92% primarily watch movies (and other content) AT HOME, essentially alone or with their +1

• TV remains the primary & preferred medium to watch movies, TV shows and documentaries for almost 90%. But on TV, many options are used to watch movies: standard channels, movies channels, online streaming, VOD and even DVD still.

• Mobile devices get great momentum as far as Non-Traditional video viewing is concerned

Theatre and cinema still provide a unique and complete experience, attracting almost two-thirds of Canadians from time to time and particularly the segment drawn to special effects, science fiction and sequels.
Canadians Have Very Positive Attitude Toward Canadian Movies and Telefilm Canada

- 61% of Canadians show manifest interest in Canadian movies
- 52% of Canadians have heard of Telefilm Canada
- 49% of Canadians claim they can name a Canadian movie
- 48% of Canadians watched a Canadian movie in the past year
- 61% of those who watched Canadian movies recalled the movie title

74% of Canadians agree that Telefilm Canada plays an important role in providing financial support for the private sector to create distinctly Canadian productions that appeal to domestic and international audiences.
MOVIE CONSUMPTION IN CANADA IS DRIVEN BY 2 DYNAMICS WHICH UNVEIL 4 MAJOR TRENDS:

**PURPOSE OR VIEWER BENEFIT**

This dynamic reveals 2 trends:

- **58%** of Canadians are primarily searching to be **ENTERTAINED** and have **FUN**
- **42%** of Canadians are primarily sensitive to the interest of the **CONTENT** and what they will learn from it

**FEELING AND EMOTIONS**

This dynamic reveals 2 trends:

- **50%** of Canadians find in movies an opportunity to **EXPLORE** and **DISCOVER**
- **50%** of Canadians find in movies an opportunity to establish **AFFINITY** by relaxing and chilling in the privacy of the familial cocoon
THE COMBINATION OF THESE TWO DYNAMICS REVEALS INTERMEDIARY TRENDS AND INFLUENCES WHICH ULTIMATELY ENABLES TO IDENTIFY 5 KEY MOVIE-WATCHER SEGMENTS IN CANADA
THE FIVE MOVIE-WATCHER SEGMENTS IN CANADA

23% Belonging

Look to film as a source of cultural awareness and knowledge. Their choice of media is influenced by their feeling of identity and culture.

19% Home Sweet Home

Like to relax and switch on to whatever is convenient. Agreeable and receptive to Canadian movies, but most comfortable with light viewing.

27% Curious

Very interested in movies as a source of both entertainment and inspiration. In tune with popular culture, they watch movies of all types, but are most interested in ‘exciting’ films.

11% Family Popcorn

Watch movies less frequently, and more likely to watch with children. Most likely to watch the most recent Disney or big-budget Hollywood film.

20% Fantasy

Interested in films as a form of escapism. Interested in blockbuster movies, special effects, sequels and action-adventure.
EACH GROUP HAS VERY SPECIFIC REASONS, MOTIVATORS AND EXPECTATIONS FOR MOVIES IN GENERAL AND CANADIAN MOVIES IN PARTICULAR

<table>
<thead>
<tr>
<th>Fantasy</th>
<th>Family Popcorn</th>
<th>Home Sweet Home</th>
<th>Curious</th>
<th>Belonging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fantasy movie watchers like to view a mixture of high octane Hollywood movies and science fiction/fantasy flicks</td>
<td>Family Popcorn movie watchers do not spend much time watching movies and will favour “easing-watching popcorn” movies</td>
<td>Home Sweet Home movie watchers are an affable and agreeable group that seek movies that bring comfort</td>
<td>Curious movie watchers are highly committed movie buffs who love all sorts of movies bringing excitement and novelty.</td>
<td>Belonging watch to expand their horizons. They see movies as an opportunity for growth and learning</td>
</tr>
<tr>
<td><strong>Need States</strong></td>
<td><strong>Need States</strong></td>
<td><strong>Need States</strong></td>
<td><strong>Need States</strong></td>
<td><strong>Need States</strong></td>
</tr>
<tr>
<td>Sensation</td>
<td>Movies &amp; Chill</td>
<td>Grow</td>
<td>Grow</td>
<td>Identity/Culture</td>
</tr>
<tr>
<td>Escape</td>
<td>Family Time</td>
<td>Escape</td>
<td>Escape</td>
<td>Grow</td>
</tr>
<tr>
<td>Cash-out</td>
<td>Hang</td>
<td>Delight</td>
<td>Idolatry</td>
<td>Identity/Culture</td>
</tr>
<tr>
<td><strong>Demographic</strong></td>
<td><strong>Demographic</strong></td>
<td><strong>Demographic</strong></td>
<td><strong>Demographic</strong></td>
<td><strong>Demographic</strong></td>
</tr>
<tr>
<td>Fantasy movie watchers skew younger, and are more likely to be male</td>
<td>Family Popcorn are older than average, and are more likely to be female. A higher proportion of them can be found in Western provinces</td>
<td>Home Sweet Home movie watchers skew towards the baby boomer demographic and are more likely to watch movies at home with members of their family</td>
<td>Curious movie watchers have the highest proportion with a mother tongue other than English/French and the most who were born outside of Canada.</td>
<td>Belonging movie watchers are more likely to live in Quebec and speak French. They are also most likely to have been born outside of Canada</td>
</tr>
<tr>
<td><strong>Canadian Movies</strong></td>
<td><strong>Canadian Movies</strong></td>
<td><strong>Canadian Movies</strong></td>
<td><strong>Canadian Movies</strong></td>
<td><strong>Canadian Movies</strong></td>
</tr>
<tr>
<td>This segment is relatively uninterested in Canadian movies. Their focus more on the blockbuster of the day</td>
<td>This segment is not interested in Canadian movies</td>
<td>This segment feels positive about Canadian movies, but they are very passive</td>
<td>This segment likes Canadian movies and are most likely to proactively search for new ones to watch.</td>
<td>This segment is very interested in Canadian movies but will need to be (content wise) influenced</td>
</tr>
<tr>
<td>20%</td>
<td>11%</td>
<td>19%</td>
<td>27%</td>
<td>23%</td>
</tr>
</tbody>
</table>
TWO SEGMENTS APPEAR AS PRIMARY TARGETS TO PROMOTE CANADIAN CONTENT, FOR WHICH TELEFILM ALREADY ACTS AS A LEGITIMATE & RELIABLE ADVOCATE

They collectively represent 50% of content viewers in Canada.

Curious 27%

- They are heavy movie viewers.
- They have eclectic tastes.
- They watch movies to grow, learn, escape and have fun.
- They enjoy and support Canadian movies.
- They believe it is important to promote Canadian movies.
- They seek novelty and expect more diversity from movies.

Belonging 23%

- They are medium movie viewers.
- Their taste is more driven by variety and quality than genre.
- They watch movies for identity and cultural reasons and to grow.
- They are open and sensitive to Canadian movies – and particularly from Quebec, but are more passive (won’t actively seek them).
- They are driven by quality, diversity, cultural affinity.
HOW TO ENGAGE WITH CURIOUS MOVIE WATCHERS?

WHAT TO VALUE?
• VARIETY OF CONTENT
• DIVERSITY IN MOVIES
• COMBINATION OF GROW & FUN

WHERE?
• ONLINE STREAMING SERVICE
• VIDEO ON DEMAND
• THEATRE

WHITE SPACE
• Opportunity to engage through community & social media
• Opportunity to engage through social events

HOW?
They are responsive to promotions & influencers
• Trailers/preview
• Referral/word-of-mouth
• YouTube
• Professional critics
HOW TO ENGAGE WITH BELONGING MOVIE WATCHERS?

WHAT TO VALUE?
- QUALITY OF CONTENT
- CULTURAL CONTEXT & PURPOSE (INCLUDING FRENCH CONTENT)
- DIVERSITY IN MOVIES

WHERE?
- STANDARD TV CHANNELS
- PVR

WHITE SPACE
- Opportunity to engage by promoting “content about content”
- Opportunity to engage through festivals and conferences

HOW?
A bit passive and fickle. This segment will require a more 1:1 approach
- direct marketing
- movie booklets/flyers
- providing context and critics
A SECONDARY SEGMENT OPPORTUNITY WOULD BE HOME SWEET HOME MOVIE WATCHERS

WHAT TO VALUE?
- CANADIAN MOVIES AS A MIRROR OF CANADIAN TRADITION & HISTORY
- CANADIAN STORY-TELLING

WHERE?
- STANDARD TV CHANNELS
- PVR

HOW?
They are influenced in mainstream ways when choosing movie content. Reaching them involves:
- TV commercials
- Referral, word-of-mouth
SEGMENT PROFILES
SEGMENT PROFILE: CURIOUS

**SEGMENT DESCRIPTION**

Curious movie watchers are highly committed movie buffs who love all sorts of movies and have a keen interest in both small budget movies and documentaries as well as big blockbusters.

They like Canadian movies and are most likely to proactively search for new ones to watch. They are sensitive to diversity in movies.

Curious movie watchers have the highest proportion of respondents with a mother tongue other than English or French and the most who were born outside of Canada.

**MOVIE CONSUMPTION**

- **Watched a movie in past 12 months**: 95%
- **Watched more movies in past 12 months**: 27%

<table>
<thead>
<tr>
<th>Movie Frequency</th>
<th>20%</th>
<th>47%</th>
<th>33%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Medium</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Accompanied By**

- **Spouse/ Partner**: 40%
- **Friends**: 17%
- **Children**: 12%
- **Extended Family**: 8%
- **Myself**: 31%

**Movie Language**

- **English**: 86%
- **French**: 33%

**Top 5 Platforms Used**

- **Online Streaming Service**: 16%
- **DVD/BluRay/4k player**: 15%
- **Cable/Satellite TV - standard channels**: 10%
- **Cable/Satellite TV - Movie channels**: 8%
- **Cable/Satellite TV - Video On Demand**: 6%

**Viewing Location**

- **Home**: 61%
- **Theatre/ Cinema**: 29%
- **Other**: 10%

**DEMOGRAPHICS**

<table>
<thead>
<tr>
<th>Region</th>
<th>Male</th>
<th>Female</th>
<th>Average Age</th>
<th>HH Composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/Terr</td>
<td>53%</td>
<td>47%</td>
<td>43.6</td>
<td>1.7</td>
</tr>
<tr>
<td>AB</td>
<td>58%</td>
<td>42%</td>
<td>37%</td>
<td>58%</td>
</tr>
<tr>
<td>MB/SK</td>
<td>58%</td>
<td>42%</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>ON</td>
<td>58%</td>
<td>42%</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td>QC</td>
<td>58%</td>
<td>42%</td>
<td>24%</td>
<td>5%</td>
</tr>
<tr>
<td>Atlantic</td>
<td>58%</td>
<td>42%</td>
<td>19%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mother Tongue</th>
<th>Average Age</th>
<th>HH Composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>58%</td>
<td>1.7</td>
</tr>
<tr>
<td>French</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>Other</td>
<td>58%</td>
<td>24%</td>
</tr>
</tbody>
</table>

**Born in Canada**

- **Yes**: 79%

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average)*

Base: All respondents who fall into the Curious segment, n=628
Index Base: All Respondents, n=3010
## MOVIE PREFERENCE

### Top 5 Genres Watched In Last 12 Months

<table>
<thead>
<tr>
<th>Genre</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action / Adventure</td>
<td>90%</td>
</tr>
<tr>
<td>Comedy</td>
<td>90%</td>
</tr>
<tr>
<td>Documentary</td>
<td>88%</td>
</tr>
<tr>
<td>Mystery / Thriller</td>
<td>87%</td>
</tr>
<tr>
<td>Crime / police</td>
<td>85%</td>
</tr>
</tbody>
</table>

### Top 5 Last Genres Watched

<table>
<thead>
<tr>
<th>Genre</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action / Adventure</td>
<td>24%</td>
</tr>
<tr>
<td>Comedy</td>
<td>17%</td>
</tr>
<tr>
<td>Science-fiction</td>
<td>11%</td>
</tr>
<tr>
<td>Family drama</td>
<td>8%</td>
</tr>
<tr>
<td>Animation</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Need States

- Delight: 46%
- FOMO: 30%
- Idolatry: 29%
- Escape: 27%
- Grow: 25%
- Sensation: 17%
- Idolatry: 16%
- Bonus Features: 15%
- Movies & Chill: 10%
- Identity/Culture: 9%
- Family Time: 8%
- Hang: 3%
- Cash-Out: 3%

### Movie Type Interest

- Big budget Hollywood movies
- Canadian movies
- Feature documentaries
- Foreign movies
- Lower budget independent movies
- Virtual Reality
- Movies from Quebec
- 3D movies

### Movie Info Sources

- Trailers/previews: 42%
- TV Commercial: 33%
- Recommendation from family/friends/colleagues: 29%
- YouTube: 18%
- Professional reviews by movie critics: 17%

### Statement Agreement

- There should be more diversity, in general, in film: 57%
- Films are often too violent: 47%
- There aren't enough women-positive films right now: 44%
- The LGBTQ community needs more content/visibility in film: 38%
- There aren't enough films geared towards my age group: 24%
- My ethnic/cultural group is underrepresented in film: 23%
- Young people are not represented enough in film: 23%

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average)"
SEGMENT PROFILE: CURIOUS

CANADIAN MOVIES

64% \(^{131}\) Can name a Canadian movie

64% \(^{133}\) Watched a Canadian movie

41% \(^{205}\) Seeks out Canadian movies

Top 5 Canadian Movies

- Room
- Bon Cop, Bad Cop
- Hyena Road
- La guerre des tuques
- Mommy

Top 5 Canadian Documentaries

- Being Canadian
- Nature of Things
- W5
- CBC/Doc Zone
- Animals

TELEFILM

Telefilm Awareness

<table>
<thead>
<tr>
<th>Yes</th>
<th>57% (^{110})</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>43% (^{87})</td>
</tr>
</tbody>
</table>

Importance of the Role of Telefilm

- Very/Somewhat Important: 88% \(^{119}\)
- Neither: 9% \(^{50}\)
- Not Very/Not at All Important: 2% \(^{25}\)

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average)

Base: All respondents who fall into the Curious segment, n=628
Index Base: All Respondents, n=3010
SEGMENT PROFILE: BELONGING

SEGMENT DESCRIPTION

Belonging movie watchers watch movies to expand their horizons. They are most likely to see movies as an opportunity for growth and learning. Belonging are most connected to international cinema.

This group does not watch movies the most frequently, but they are very interested in Canadian movies. When watching movies, they are most likely to watch them alone, and are not as likely to stream movies.

Belonging movie watchers are more likely to live in Quebec and speak French. They are also most likely to have been born outside of Canada.

MOovie CONSUMPTION

- Watched a movie in past 12 months: 86%
- Watched more movies in past 12 months: 18%

Movie Frequency
- Heavy: 10%
- Medium: 42%
- Light: 49%

Accompanied By
- Spouse/Partner: 38%
- Friends: 13%
- Children: 12%
- Extended Family: 6%
- Myself: 36%

Movie Language
- English: 83%
- French: 39%

Top 5 Platforms Used
- DVD/BluRay/4k player: 16%
- Online Streaming Service: 13%
- Cable/Satellite TV - standard channels: 13%
- Cable/Satellite TV - Movie channels: 9%
- PVR (personal/digital video recorders): 5%

Viewing Location
- Home: 67%
- Theatre/Cinema: 25%
- Other: 8%

Movie Language
- English: 83%
- French: 39%

Mother Tongue
- English: 54%
- French: 31%
- Other: 15%

Born in Canada
- Yes: 80%

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average).

DEMOGRAPHICS

<table>
<thead>
<tr>
<th>Region</th>
<th>Female</th>
<th>Male</th>
<th>Average Age</th>
<th>0 Children</th>
<th>1 Child</th>
<th>2 Children</th>
<th>3+ Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/Terr</td>
<td>31%</td>
<td>69%</td>
<td>48%</td>
<td>84%</td>
<td>9%</td>
<td>20%</td>
<td>5%</td>
</tr>
<tr>
<td>AB</td>
<td>31%</td>
<td>69%</td>
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<td>9%</td>
<td>20%</td>
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</tr>
</tbody>
</table>

*Base: All respondents who fall into the Belonging segment, n=617
Index Base: All Respondents, n=3010

23% of Canadians
## SEGMENT PROFILE: BELONGING

### MOVIE PREFERENCE

<table>
<thead>
<tr>
<th>Top 5 Genres Watched In Last 12 Months</th>
<th>Top 5 Last Genres Watched</th>
<th>Need States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comedy 83% 98</td>
<td>Comedy 18% 106</td>
<td>Delight 40% 91</td>
</tr>
<tr>
<td>Action / Adventure 78% 93</td>
<td>Action / Adventure 16% 70</td>
<td>FOMO 24% 92</td>
</tr>
<tr>
<td>Documentary 76% 107</td>
<td>Family drama 10% 125</td>
<td>Grow 21% 117</td>
</tr>
<tr>
<td>Crime / police 75% 96</td>
<td>Science-fiction 9% 82</td>
<td>Idolatry 17% 74</td>
</tr>
<tr>
<td>Mystery / Thriller 74% 96</td>
<td>Animation 9% 129</td>
<td>Movies &amp; Chill 14% 88</td>
</tr>
<tr>
<td><strong>Movie Type Interest</strong></td>
<td></td>
<td>Escape 14% 67</td>
</tr>
<tr>
<td>Feature documentaries 55% 95</td>
<td></td>
<td>Documentaries 14% 100</td>
</tr>
<tr>
<td>Canadian movies 55% 90</td>
<td></td>
<td>Identity/Culture 11% 138</td>
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<td>Foreign movies 53% 133</td>
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<td>Family Time 10% 91</td>
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<td>Lower budget independent movies 46% 121</td>
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<td>Sensation 5% 33</td>
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<td>Movies from Quebec 34% 121</td>
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<td>Hang 5% 71</td>
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<td>Big budget Hollywood movies 22% 31</td>
<td></td>
<td>Cash-Out 2% 100</td>
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<tr>
<td>3D movies 17% 50</td>
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<td><strong>Statement Agreement</strong></td>
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<tr>
<td>Virtual Reality 13% 35</td>
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<td>Films are often too violent 50% 109</td>
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<td><strong>Movie Info Sources</strong></td>
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<td>There should be more diversity, in general, in film 44% 105</td>
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<td>TV Commercial 32% 91</td>
<td></td>
<td>There aren't enough women-positive films right now 34% 106</td>
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<tr>
<td>Trailers/previews 30% 79</td>
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<td>The LGBTQ community needs more content/visibility in film 22% 96</td>
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<td>Recommendation from family/friends/colleagues 28% 100</td>
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<td>There aren't enough films geared towards my age group 20% 100</td>
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<td>Professional reviews by movie critics 13% 108</td>
<td></td>
<td>My ethnic/cultural group is underrepresented in film 15% 86</td>
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<tr>
<td>Facebook 13% 100</td>
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<td>Young people are not represented enough in film 12%</td>
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</tbody>
</table>

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average)*

Base: All respondents who fall into the Belonging segment, n=617
Index Base: All Respondents, n=3010

64% 91
Heard of movie prior to watching
SEGMENT PROFILE: BELONGING

CANADIAN MOVIES

56% Can name a Canadian movie

53% watched a Canadian movie

18% Seeks out Canadian movies

Top 5 Canadian Movies
- Room
- Paul à Québec
- La passion d'Augustine
- Guibord s'en va-t-en guerre
- La guerre des tuques

Top 5 Canadian Documentaries
- Nature of Things
- Découvertes
- Fifth Estate
- CBC/Doc Zone
- Cities/provinces/geographic areas

TELEFILM

Telefilm Awareness

59% Yes

41% No

Importance of the Role of Telefilm

71% Very/Somewhat Important

21% Neither

8% Not Very/Not at All Important

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average)

Base: All respondents who fall into the Belonging segment, n=617
Index Base: All Respondents, n=3010
SEGMENT PROFILE: HOME SWEET HOME

SEGMENT DESCRIPTION

Home Sweet Home movie watchers are an affable and agreeable group that seek movies that bring comfort.

Though they feel positively about Canadian movies, they aren’t very engaged. This group of movie watchers are more likely to switch on the television to their favourite show than watch a movie. They are concerned about violence in movies.

Home Sweet Home movie watchers skew towards the baby boomer demographic and are more likely to watch movies at home with members of their family.

MOVIE CONSUMPTION

Watched a movie in past 12 months
Watched more movies in past 12 months

Movie Frequency
Heavy 8% 66
Medium 43% 100
Light 49% 108

Accompanied By
Spouse/Partner 45% 107
Friends 10% 71
Children 12% 108
Extended Family 7% 100
Myself 32% 100

Movie Language
English 94% 104
French 12% 44

Top 5 Platforms Used
Online Streaming Service 14% 100
DVD/BluRay/4k player 13% 92
Cable/Satellite TV - standard channels 12% 100
Cable/Satellite TV - Movie channels 8% 100
Personal Video Recorder 6% 150

Viewing Location
Home 66% 103
Theatre/ Cinema 27% 96
Other 6% 88

MOVIE LANGUAGE

English 94% 104
French 12% 44

DEMOGRAPHICS

<table>
<thead>
<tr>
<th>Region</th>
<th>Gender</th>
<th>Age</th>
<th>HH Composition</th>
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<td>Male</td>
<td>38%</td>
<td>Avg. # Children</td>
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<td></td>
<td>Female</td>
<td>62%</td>
<td>1.7 86</td>
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<tr>
<td>AB</td>
<td>Male</td>
<td>38%</td>
<td>0 Children</td>
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<tr>
<td></td>
<td>Female</td>
<td>62%</td>
<td>65% 92</td>
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<td>38%</td>
<td>1 Child</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>62%</td>
<td>18% 92</td>
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<tr>
<td>ON</td>
<td>Male</td>
<td>38%</td>
<td>2 Children</td>
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<tr>
<td></td>
<td>Female</td>
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<td>62%</td>
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<tr>
<td>Atlantic</td>
<td>Male</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>62%</td>
<td></td>
</tr>
</tbody>
</table>

Mother Tongue

English 80% 125
French 12% 52
Other 8% 62

Average Age 51.5 112
15-34 19% 59
35-54 31% 54
55+ 50% 143

Born in Canada

Yes 90% 108

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Base: All respondents who fall into the Home Sweet Home segment, n=566
Index Base: All Respondents, n=3010
SEGMENT PROFILE: HOME SWEET HOME

MOVIE PREFERENCE

Top 5 Genres Watched In Last 12 Months

- Comedy: 87% (102)
- Action / Adventure: 84% (100)
- Crime / police: 82% (105)
- Mystery / Thriller: 79% (103)
- Documentary: 75% (106)

Top 5 Last Genres Watched

- Action / Adventure: 22% (96)
- Comedy: 16% (94)
- Science-fiction: 11% (100)
- Family drama: 8% (100)
- Animation: 6% (86)

Movie Type Interest

- Big budget Hollywood movies: 86% (119)
- Canadian movies: 78% (128)
- Feature documentaries: 77% (133)
- Lower budget independent movies: 30% (79)
- 3D movies: 22% (65)
- Movies from Quebec: 15% (54)
- Foreign movies: 11% (28)
- Virtual Reality: 1% (0)

Top 5 Movie Info Sources

- Trailers/previews: 39% (103)
- TV Commercial: 38% (109)
- Recommendation from family/friends/colleagues: 31% (111)
- Professional reviews by movie critics: 10% (83)
- Facebook: 10% (77)

ATTITUDES TOWARDS MOVIES

Need States

- Delight: 47% (107)
- FOMO: 26% (100)
- Idolatry: 24% (104)
- Movies & Chill: 21% (124)
- Escape: 21% (100)
- Sensation: 15% (107)
- Bonus Features: 15% (107)
- Grow: 13% (72)
- Family Time: 13% (118)
- Identity/Culture: 8% (100)
- Hang: 6% (86)
- Cash-Out: 1% (50)

Statement Agreement

- Films are often too violent: 54% (117)
- There should be more diversity, in general, in film: 40% (95)
- There aren't enough women-positive films right now: 33% (103)
- There aren't enough films geared towards my age group: 22% (110)
- The LGBTQ community needs more content/visibility in film: 21% (91)
- Young people are not represented enough in film: 10% (71)
- My ethnic/cultural group is underrepresented in film: 8% (53)

Base: All respondents who fall into the Home Sweet Home segment, n=566
Index Base: All Respondents, n=3010

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average)
SEGMENT PROFILE: HOME SWEET HOME

CANADIAN MOVIES

- **Can name a Canadian movie**: 42% (86)
- **watched a Canadian movie**: 46% (96)
- **Seeks out Canadian movies**: 16% (80)

**Top 5 Canadian Movies**
- Room
- Hyena Road
- Bon Cop, Bad Cop
- Mommy
- Guibord s’en va-t-en guerre

**Top 5 Canadian Documentaries**
- Nature of Things
- Fifth Estate
- Découvertes
- Animals
- Canada's involvement in World Wars

TELEFILM

**Telefilm Awareness**
- Yes: 57% (110)
- No: 43% (87)

**Importance of the Role of Telefilm**
- Very/Somewhat Important: 82% (111)
- Neither: 14% (78)
- Not Very/Not at All Important: 4% (50)

Base: All respondents who fall into the Home Sweet Home segment, n=566
Index Base: All Respondents, n=3010

*Numbers in superscription indicate results among segments compared to overall average (e.g. 100 indicates parity with overall average)*
UNDERSTANDING AND ENGAGING WITH BELONGING AND CURIOUS

QUALITATIVE RESEARCH REPORT
BACKGROUND, OBJECTIVES AND METHODOLOGY
BACKGROUND AND OBJECTIVES

Nielsen conducted an extensive survey in June 2016 for Telefilm, in which two segments were identified as potentially interesting for Telefilm to explore and to learn how to engage with, namely, the Belonging and Curious segments.

The objectives of this study are to get to know the Belonging and Curious segments:
• Media habits, consumption and need states
• Perceptions, image and consumption of Canadian and Quebec films
• Awareness, image and role of Telefilm
This research was conducted between September 20th and September 28th, 2016

Groups were conducted in Toronto, Vancouver, Montreal, and Quebec City

Two groups were held in each city:
- one with respondents who fit into the Belonging segment
- one with respondents who qualified for the Curious segment

Each segment was defined as follows:
- **Belonging:** somewhat or does not enjoy watching Big Budget Hollywood Movies; enjoys watching lower budget OR foreign OR Canadian movies; agrees with the statement: I value the artistic nature of the content and the quality of the production
- **Curious:** enjoys watching Big Budget Hollywood Movies; enjoys watching lower budget OR foreign OR Canadian movies; agrees with the statement: I value watching a variety of genres that will bring me a range of sensations and emotions

The groups in Toronto and Vancouver were conducted in English, while the groups in Montreal and Quebec City were held in French
MOVIE CONSUMPTION IS ON THE RISE GIVEN THE NUMBER OF READILY ACCESSIBLE OPTIONS AVAILABLE

- Consumers are still visiting movie theatres, especially for big budget Hollywood blockbusters and action flicks, or comedies where audience reactions are shared
- They are also watching more movies at home, some indicating they have invested in a larger TV and a home sound system to re-create the movie theatre experience
- Both segments were very enamored with streaming movies through sites like Netflix because of its vast selection of content, its ease of use and convenience, and the facility of discovering new movies/TV shows and receive suggestions
- Sites like YouTube are also frequented daily to watch clips, trailers, and short films
- Meanwhile, cable/satellite is more often used to watch timely content such as news, sporting events, and other content that is immediate or unavailable elsewhere
- Video on Demand is not a preferred option for either segment – it is expensive, content is stale and outdated, and its navigation/interface isn’t very user friendly

- Ensure Canadian films and productions are distributed to streaming sites, where consumers have a very good chance of discovering them
- Consider marketing trailers and shorter videos to sites like YouTube, where content is absorbed in quick bites and shared with friends
THE THEATRE ATMOSPHERE IS A KEY DRIVER FOR SEEING MOVIES AT THE CINEMA, WHILE COST IS OFTEN A BARRIER

• Consumers enjoyed the movie theatre experience and seeing new films on a bigger screen with better sound. It is an activity (outing) for many

• Seeing films in a theatre was a more immersive experience than just sitting at home, and made a movie feel more like an event than a way to pass the time

• The price of admission, however, was a barrier, particularly when taking the family

• Several also disliked dealing with crowds, long lines, sold out shows, and the planning that went into a night out at the movies

• Others felt the atmosphere they sought was sometimes disrupted by other patrons, who talked during the film, used their phones, or fell asleep and snored

• Some of these barriers are being addressed by theatre owners who are improving the movie-going experience by offering reserved seating, a more immersive experience (UltraAVX), and enforcing rules

• There is, however, room for improvement, particularly in the screening smaller films that won’t benefit from bigger sound systems; some respondents had visited theatres in the U.S. where indie films were screened in plush surroundings along with a full dinner and wine
TRAILERS AND REVIEWS ARE KEY TO SELECT MOVIES, PARTICULARLY THOSE SCREENED IN THEATRES

• Both segments looked for trailers to determine if a movie would be to their liking
• The Belonging segment was also fond of reviews on sites like Rotten Tomatoes, to gauge whether smaller, lesser known films would be worth their while
• While some appreciated the technical details professional critics provided, they often preferred audience reviews, or used aggregate scores to guide them
• Several from the Curious segment said they often sought the familiar – sequels, or films based on comics or books they read
• Quite a few were also drawn to particular films by actors or directors they liked
• Some suggested they were less picky when scrolling through the choices on streaming services, where key art, story synopses, and star ratings influenced them

• Ensure trailers for Canadian feature films are readily available online where filmgoers seek them out
CONSUMERS FROM THE BELONGING SEGMENT WERE MORE LIKELY TO GO TO FILM FESTIVALS AND SHOWCASES

• Several from this segment, particularly in Toronto and Vancouver, had been to a fest
• Film festivals provided them with an opportunity to discover foreign films and indie features with limited engagements, and meet filmgoers with similar tastes
• Many from the Curious segment, however, were less interested in risking time and money on the types of films shown at festivals
• Several from the Belonging segment also expressed a greater interest in showcases, which some attended and described fondly
• Some participants in the Curious groups suggested they created their own showcases at home instead, such as holding horror movie marathons near Halloween

Consider enticing the Belonging segment with festivals or showcases where Canadian films can be screened in a more intimate setting, but ensure such events are well promoted, accessible, and affordable

Consider new ways to curate content: post different lists of Canadian films in different categories on sites these consumers frequent (like IMDB) that might inspire them to create their own showcases at home
EACH SEGMENT HAS UNIQUE NEEDS AND CONSUMES MOVIES DIFFERENTLY

**Curious**

- I watch movies for the experience, to be entertained
- Movies let me escape my life, so I can zone out
- I enjoy Hollywood blockbusters and action movies
- TV affords me with a quick escape

**Belonging**

- TV keeps me informed, up to date
- I enjoy compelling, real life stories such as dramas and documentaries
- Movies allow me to escape my life, so I can immerse myself in another one
- I watch movies to feel and think
- Movies are introspective: I enjoy watching them alone or with my spouse
MADE IN CANADA
PERCEPTIONS OF CANADIAN CINEMA

((messages in black are for both segments)
MADE IN QUEBEC
PERCEPTIONS OF QUEBECOIS CINEMA

(words in black are for both segments)
CANADIAN CINEMA IS BELIEVED TO BE UNIQUE, AND CANADA’S FILM INDUSTRY IS UNDERAPPRECIATED

• Both segments believed Canadian films were very unique from Hollywood films
• While Canadian filmmakers were less likely to make an action film that was heavy with special effects, they did produce quality films that focused on storytelling
• These smaller, intimate and introspective stories were especially appealing to the Belonging segment, while the Curious segment often lauded the Canadian talent in front of and behind the camera, which they believed did not get much respect

• Promotion of Canadian film should not shy away from highlighting its unique stories and storytellers; this should be encouraged, especially when targeting the Belonging segment who seek such content
• Consumers in English Canada were also very proud of their homegrown film industry, as were the Francophones in Quebec who similarly revered their province’s film heritage
• This feeling of pride can be leveraged or tapped into by promoting the Canadian talent – the writers, actors, directors – who make our films
CANADIAN FILM HAS EVOLVED AND IMPROVED, BUT LOWER BUDGETS AND LOWER PRODUCTION VALUES CREATE SOME MISGIVINGS

• While no one argued that Canada produces films with well told, quality stories, the lower production budgets available to Canadian filmmakers made some consumers feel Canadian films looked lower in quality, limited the genres made here, and affected the talent pool that was drawn to them

• This issue is further compounded when consumers see the results of the U.S. and foreign productions shot here – recent films like X-Men: Apocalypse or Suicide Squad look much different than traditional Canadian fare, yet used the same local crews

• A few felt Canadian films sometimes looked rushed and thrown together by contrast

• Finding ways to break down or somehow change these negative opinions is essential, particularly when targeting the Curious segment who are used to seeing spectacles with big budget production values

• While some from the Curious segment shy away from Canadian films because the content does not appeal to them – boring, dull, and not very exciting – or there were so many other options available, they were surprised and impressed to learn that Canada was behind TV shows like Vikings that they did enjoy
CANADIAN CINEMA IS NOT WELL MARKETED AND IS SOMETIMES HARD TO IDENTIFY

• While the Canadian film industry is thriving, particularly in Vancouver where several mentioned seeing film crews in their streets, some feel Canadian films rarely play at their local multiplex, aren’t marketed as Canadian, or are difficult to identify as such

• Some discovered Canadian films randomly – they chose a movie based on other elements that interested them, and were often surprised it was a local production

• While the Belonging groups seemed more naturally open to watching Canadian films than the Curious ones, some from both segments suggested that knowing a film is Canadian could tip the scales in its favour when choosing between two similar films

• Find ways to improve film distribution of Canadian films in larger multiplexes or improve the ways in which they are promoted there; or, consider fostering relationships with, or subsidize small theatres, to continue to present Canadian cinema to their niche audiences

• Develop new ways to highlight and market Canadian films – some suggested they would like to see a logo/symbol on trailers or key art that point out a film is Canadian – but do so cautiously, as a few of the more jaded Curious consumers may use this as a warning to stay away
WHILE THERE WAS LITTLE AWARENESS OF TELEFILM AND ITS MISSION, ITS GOALS WERE BELIEVED TO BE IMPORTANT

• Awareness of Telefilm was a touch stronger with the Belonging segment, particularly in Quebec City, where there was more knowledge about how films get financed.
• Many from both segments described Telefilm’s mission as valid and necessary.
• While they generally agreed with the idea of promoting Canadian films and improving their visibility, several also expressed concern that these efforts would extend to lower quality films that had little chance to succeed at the box office.
• Several others were surprised that these efforts were taking place and they knew nothing about it; quite a few believed Telefilm needed to better promote itself, too.

• Consider creating more awareness about Telefilm and its mission among the movie-going public; this may be achieved with theatrical ads or short that precede the main feature, similar to Historica Canada’s A Part Of Our Heritage shorts that also ran before movies.
• Consider a promotional piece that shows the effect Telefilm has had on the film industry and what it is currently up to, while addressing concerns money might be misspent on unknown films by highlighting the films moviegoers might know: Bon Cop Bad Cop, Room, Les Invasions Barbares, Crash, The Sweet Hereafter.
Thank you

For any questions, please contact sr@telefilm.ca