

UNDERSTANDING AND ENGAGING WITH AUDIENCES

October 2016

TELEFILM
C A N A D A

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de l'industrie des médias
de l'Ontario

SODEC
Québec 

TABLE OF CONTENTS

Quantitative Research	3
Background, Objectives and Methodology	4
Key Findings and Recommendations	9
Segment Profiles	21
Qualitative Research	31
Background, Objectives and Methodology	32
Key Findings and Recommendations	35

UNDERSTANDING AND ENGAGING WITH AUDIENCES

QUANTITATIVE RESEARCH REPORT



July 2016

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

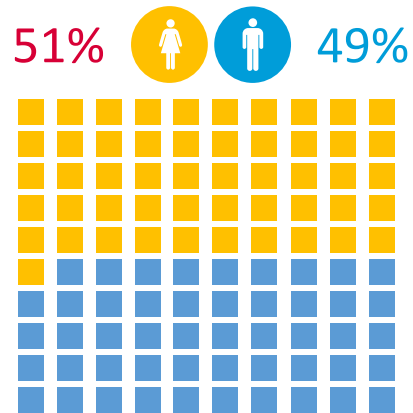
- In order to qualify for the survey, respondents were screened based on the following criteria:
 - **Age** (must be at least 15 years of age or older); and
 - **Region** (must be a resident of the regions we cover).
- The survey took an average of 19 minutes to complete.
- Language quotas based on Canadian 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.

NUMBER OF COMPLETED
INTERVIEWS BY REGION

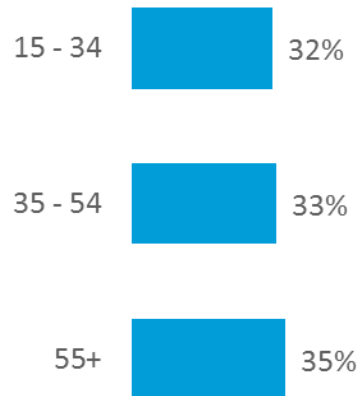
Atlantic	203
Quebec	698
Ontario	1,160
Man/Sask	197
Alberta	343
BC	409
Total	3,010

DEMOGRAPHICS

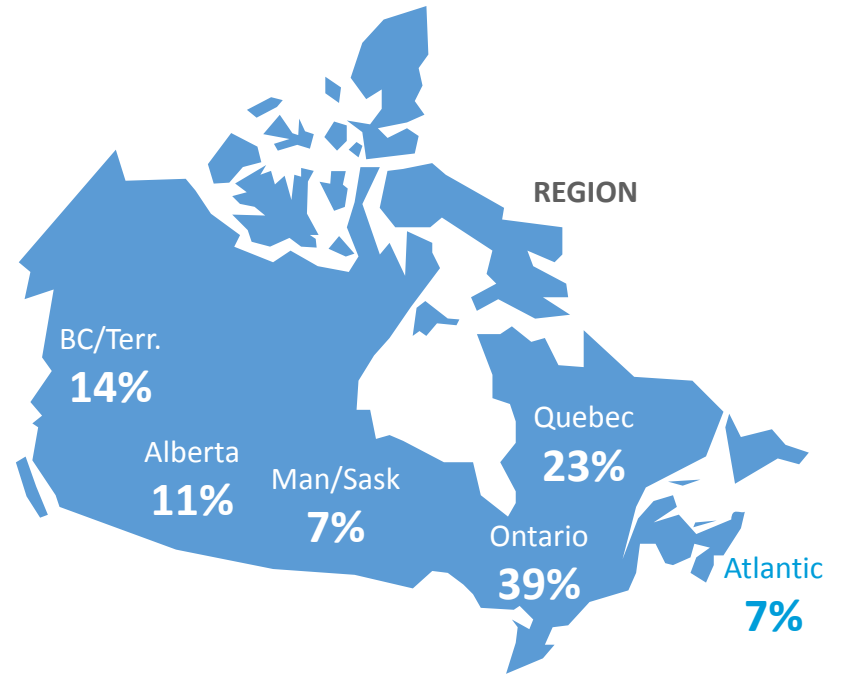
GENDER



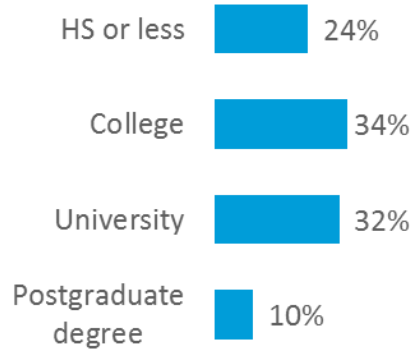
AGE GROUPS



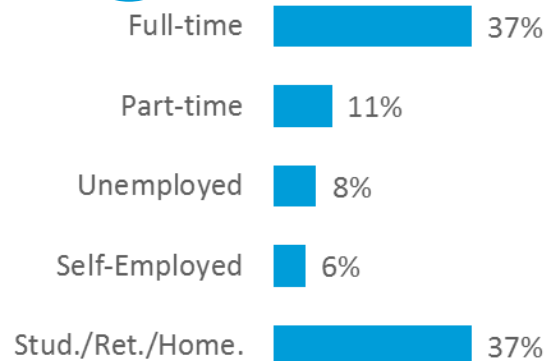
REGION



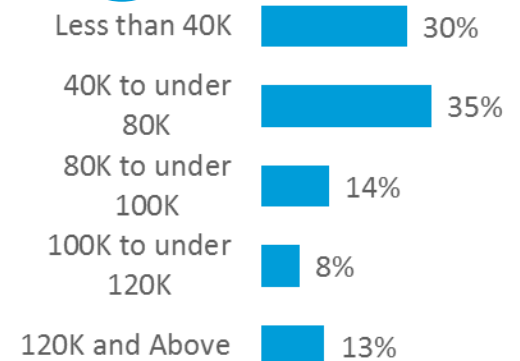
EDUCATION



EMPLOYMENT



INCOME



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

Proportion of frequent viewers by content

TV Shows	53%	11%	Movies
Non-traditional videos	27%	6%	Documentaries

TV Shows	+13%	+3%	Movies
Non-traditional videos	+15%	+2%	Documentaries

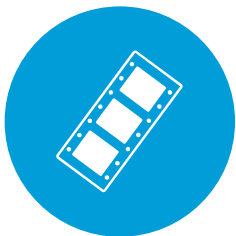
Increase of content watched compared to past year

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.

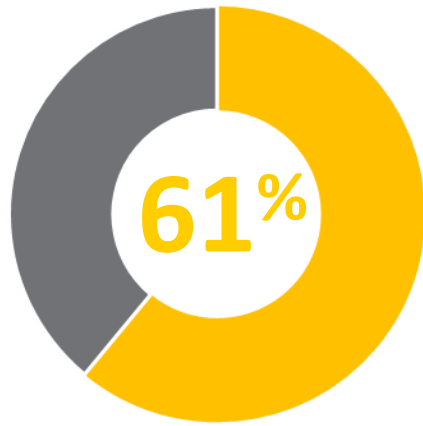
92% primarily watch movies (and other content) **AT HOME**, essentially **alone or with their +1**

- 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



of Canadians
show **manifest
interest** in Canadian
movies

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



52% of Canadians have
heard of Telefilm
Canada

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:

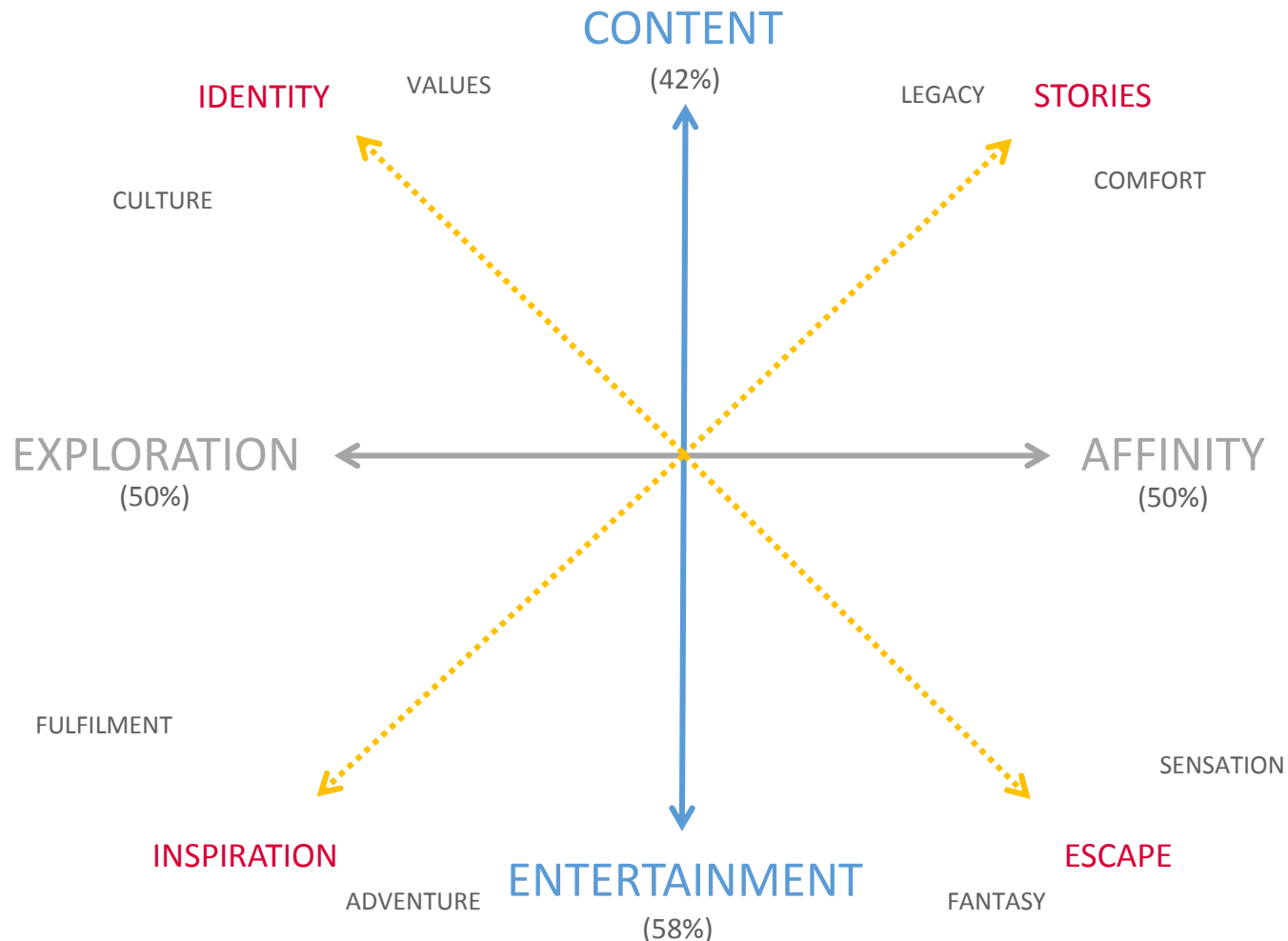
- ▶ **58%** of Canadians are primarily searching to be **ENTERTAINED** and have FUN
- ▶ **42%** of Canadians are primarily sensitive to the interest of the **CONTENT** and what they will learn from it

FEELING AND EMOTIONS

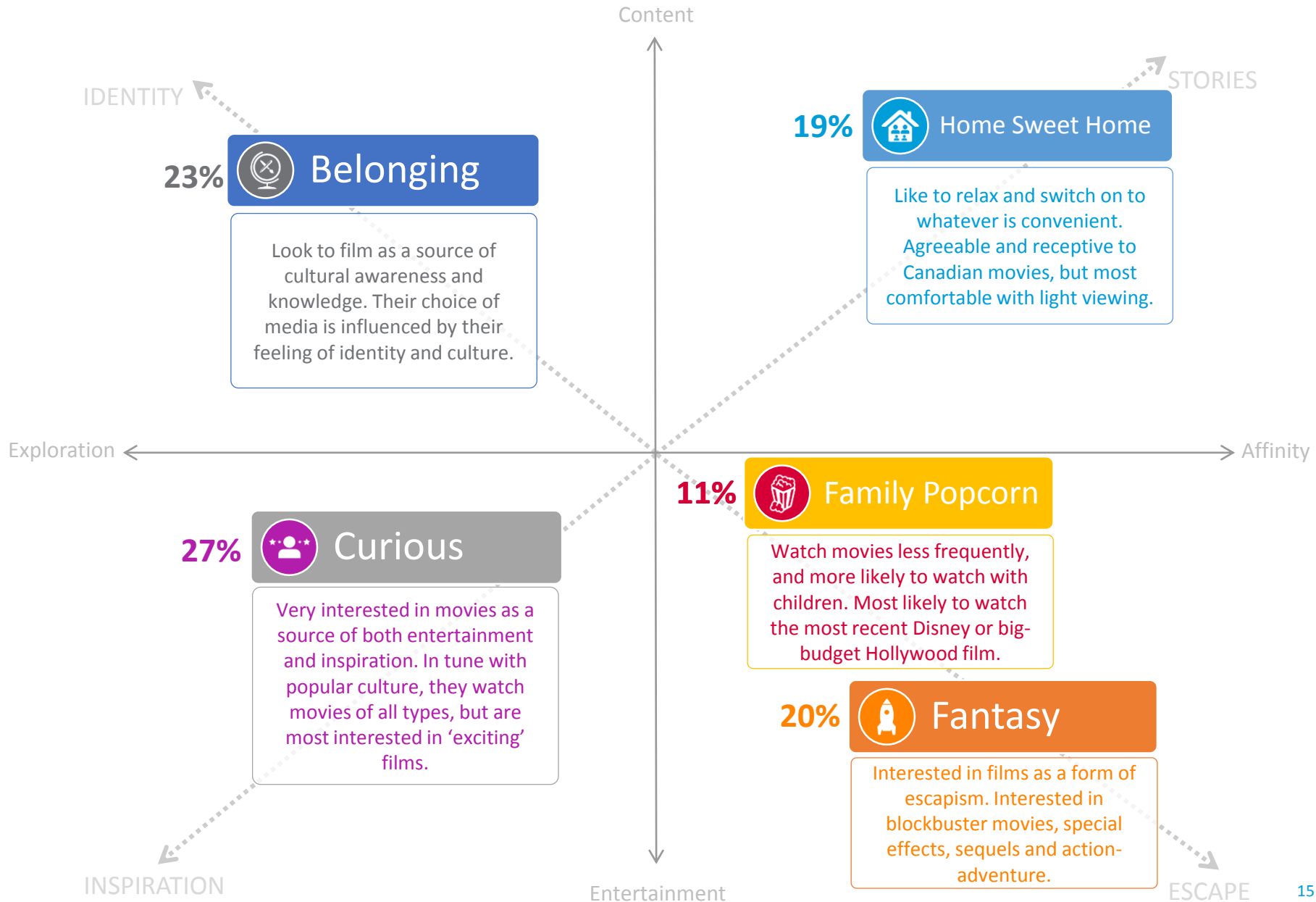
This dynamic reveals 2 trends:

- ▶ **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



EACH GROUP HAS VERY SPECIFIC REASONS, MOTIVATORS AND EXPECTATIONS FOR MOVIES IN GENERAL AND CANADIAN MOVIES IN PARTICULAR

 Fantasy	 Family Popcorn	 Home Sweet Home	 Curious	 Belonging
<p>Fantasy movie watchers like to view a mixture of high octane Hollywood movies and science fiction/fantasy flicks</p>	<p>Family Popcorn movie watchers do not spend much time watching movies and will favour "easing-watching popcorn" movies</p>	<p>Home Sweet Home movie watchers are an affable and agreeable group that seek movies that bring comfort</p>	<p>Curious movie watchers are highly committed movie buffs who love all sorts of movies bringing excitement and novelty.</p>	<p>Belonging watch to expand their horizons. They see movies as an opportunity for growth and learning</p>
<p>Need States</p> <ul style="list-style-type: none"> Sensation Escape Cash-out 	<p>Need States</p> <ul style="list-style-type: none"> Family Time Hang 	<p>Need States</p> <ul style="list-style-type: none"> Movies & Chill Family Time Delight Idolatry 	<p>Need States</p> <ul style="list-style-type: none"> Grow Escape Identity/Culture Idolatry 	<p>Need States</p> <ul style="list-style-type: none"> Identity/Culture Grow
<p>Demographic</p> <p>Fantasy movie watchers skew younger, and are more likely to be male</p>	<p>Demographic</p> <p>Family Popcorn are older than average, and are more likely to be female. A higher proportion of them can be found in Western provinces</p>	<p>Demographic</p> <p>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</p>	<p>Demographic</p> <p>Curious movie watchers have the highest proportion with a mother tongue other than English/French and the most who were born outside of Canada.</p>	<p>Demographic</p> <p>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</p>
<p>Canadian Movies</p> <p>This segment is relatively uninterested in Canadian movies. Their focus more on the blockbuster of the day</p>	<p>Canadian Movies</p> <p>This segment is not interested in Canadian movies</p>	<p>Canadian Movies</p> <p>This segment feels positive about Canadian Movies, but they are very passive</p>	<p>Canadian Movies</p> <p>This segment likes Canadian movies and are most likely to proactively search for new ones to watch.</p>	<p>Canadian Movies</p> <p>This segment is very interested in Canadian movies but will need to be (content wise) influenced</p>
<p>20%</p>	<p>11%</p>	<p>19%</p>	<p>27%</p>	<p>23%</p>

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

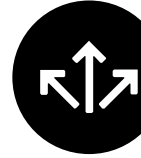
- Trailers/previews
- Referral/word-of-mouth
- YouTube
- Professional critics

HOW TO ENGAGE WITH BELONGING MOVIE WATCHERS?



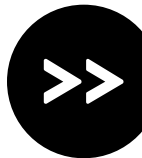
WHAT TO VALUE?

- 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

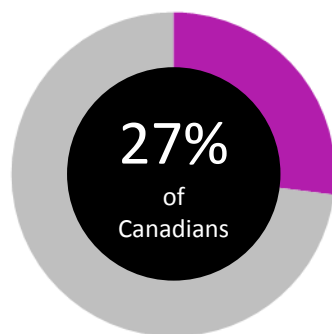
SEGMENT PROFILES



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%	¹⁰⁴
Watched more movies in past 12 months	27%	¹³⁵

Movie Frequency

Heavy	20%	¹⁶⁰
Medium	47%	¹¹¹
Light	33%	⁷⁴

Accompanied By

Spouse/ Partner	40%	⁹⁵
Friends	17%	¹²¹
Children	12%	¹⁰⁰
Extended Family	8%	¹¹⁴
Myself	31%	¹⁰³

Movie Language

English	86%	⁹⁸
French	33%	¹²²

Top 5 Platforms Used

Online Streaming Service	16%	¹¹⁴
DVD/BluRay/4k player	15%	¹⁰⁷
Cable/Satellite TV - standard channels	10%	⁸³
Cable/Satellite TV - Movie channels	8%	¹⁰⁰
Cable/Satellite TV - Video On Demand	6%	¹²⁰

Viewing Location

Home	61%	⁹⁵
Theatre/ Cinema	29%	¹⁰⁴
Other	10%	¹²⁵

DEMOGRAPHICS

Region	
BC/Terr	14% ¹⁰⁰
AB	9% ⁸²
MB/SK	7% ¹⁰⁰
ON	41% ¹⁰⁵
QC	24% ¹⁰⁴
Atlantic	6% ⁸⁶

Gender	
Male	53% ¹⁰⁸
Female	47% ⁹²
Mother Tongue	
English	58% ⁹¹
French	24% ¹⁰⁴
Other	19% ¹³⁶

Age	
Average Age	43.6 ⁹⁵
15-34	37% ¹¹⁶
35-54	33% ¹⁰⁰
55+	30% ⁸⁶
Born in Canada	
Yes	79% ⁹⁵

HH Composition	
Avg. # Children	1.7 ¹⁰⁰
0 Children	58% ¹⁰⁷
1 Child	24% ¹¹⁴
2 Children	12% ⁹²
3+ Children	5% ¹⁰⁰

Base: All respondents who fall into the Curious segment, n=628
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: CURIOUS



MOVIE PREFERENCE

Top 5 Genres Watched In

Last 12 Months

Action / Adventure	90% ¹⁰⁷
Comedy	90% ¹⁰⁶
Documentary	88% ¹²⁴
Mystery / Thriller	87% ¹¹³
Crime / police	85% ¹⁰⁹

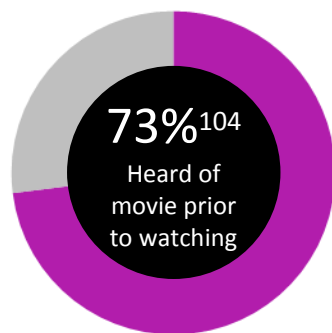
Top 5 Last Genres

Watched

Action / Adventure	24% ¹⁰⁴
Comedy	17% ¹⁰⁰
Science-fiction	11% ¹⁰⁰
Family drama	8% ¹⁰⁰
Animation	6% ⁸⁶

Movie Type Interest

Big budget Hollywood movies	96% ¹³³
Canadian movies	93% ¹⁵²
Feature documentaries	88% ¹⁵²
Foreign movies	79% ¹⁹⁸
Lower budget independent movies	76% ²⁰⁰
Virtual Reality	61% ²¹⁰
Movies from Quebec	53% ¹⁸⁹
3D movies	53% ¹⁵⁶



Movie Info Sources

Trailers/previews	42% ¹¹¹
TV Commercial	33% ⁹⁴
Recommendation from family/friends/colleagues	29% ¹⁰⁴
YouTube	18% ¹⁵⁰
Professional reviews by movie critics	17% ¹⁴²

ATTITUDES TOWARDS MOVIES

Need States

Delight	46% ¹⁰⁵
FOMO	30% ¹¹⁵
Idolatriy	29% ¹²⁶
Escape	27% ¹²⁹
Grow	25% ¹³⁹
Sensation	17% ¹¹³
Bonus Features	16% ¹¹⁴
Movies & Chill	15% ⁸⁸
Identity/Culture	10% ¹²⁵
Family Time	9% ⁸²
Hang	8% ¹¹⁴
Cash-Out	3% ¹⁵⁰

Statement Agreement

There should be more diversity, in general, in film	57% ¹³⁶
Films are often too violent	47% ¹⁰²
There aren't enough women-positive films right now	44% ¹³⁸
The LGBTQ community needs more content/visibility in film	38% ¹⁶⁵
There aren't enough films geared towards my age group	24% ¹²⁰
My ethnic/cultural group is underrepresented in film	23% ¹⁵³
Young people are not represented enough in film	23% ¹⁶⁴

Base: All respondents who fall into the Curious segment, n=628

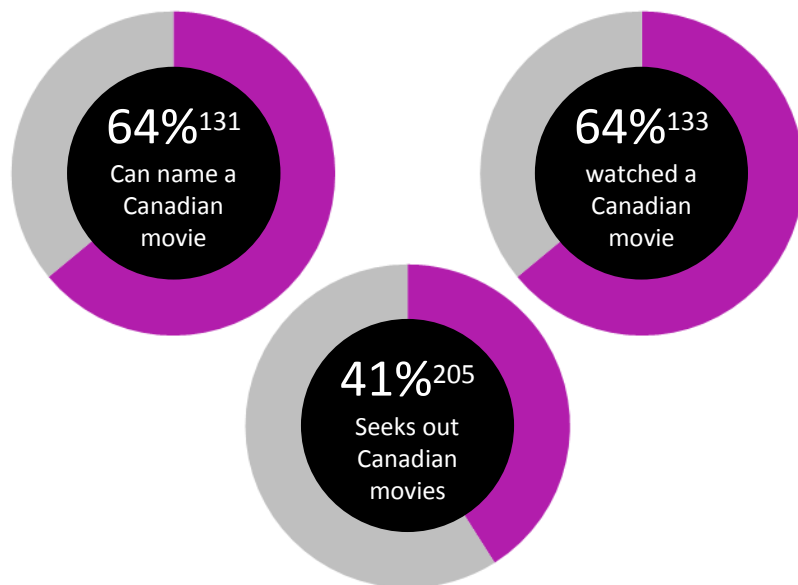
Index Base: All Respondents, n=3010

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SEGMENT PROFILE: CURIOUS



CANADIAN MOVIES



Top 5 Canadian Movies

Room	6%	120
Bon Cop, Bad Cop	4%	133
Hyena Road	3%	150
La guerre des tuques	3%	100
Mommy	2%	100

Top 5 Canadian Documentaries

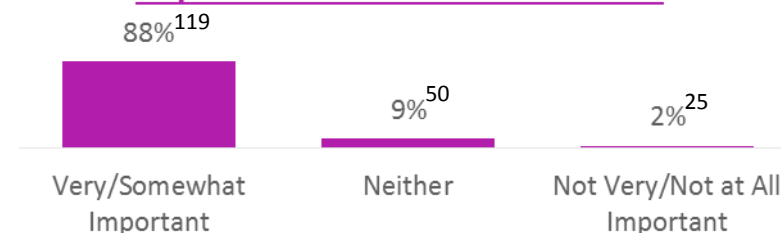
Being Canadian	3%	150
Nature of Things	3%	75
W5	2%	200
CBC/Doc Zone	2%	200
Animals	2%	200

TELEFILM

Telefilm Awareness



Importance of the Role of Telefilm



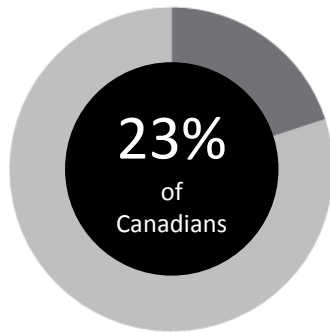
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Index Base: All Respondents, n=3010

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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.

MOVIE CONSUMPTION

Watched a movie in past 12 months	86% ⁹⁵
Watched more movies in past 12 months	18% ⁹⁰

Movie Frequency

Heavy	10% ⁷⁸
Medium	42% ⁹⁸
Light	49% ¹⁰⁸

Accompanied By

Spouse/ Partner	38% ⁹⁰
Friends	13% ⁹³
Children	12% ¹⁰⁰
Extended Family	6% ⁸⁶
Myself	36% ¹¹³

Movie Language

English	83% ⁹⁴
French	39% ¹⁴⁴

Top 5 Platforms Used

DVD/BluRay/4k player	16% ¹¹⁴
Online Streaming Service	13% ⁹³
Cable/Satellite TV - standard channels	13% ¹⁰⁸
Cable/Satellite TV - Movie channels	9% ¹⁰⁵
PVR (personal/digital video recorders)	5% ¹²⁵

Viewing Location

Home	67% ¹⁰⁵
Theatre/ Cinema	25% ⁸⁹
Other	8% ¹⁰⁰

DEMOGRAPHICS

Region	
BC/Terr	15% ¹⁰⁷
AB	8% ⁷³
MB/SK	4% ⁵⁷
ON	35% ⁹⁰
QC	31% ¹³⁵
Atlantic	6% ⁸⁶

Gender	
Male	52% ¹⁰⁶
Female	48% ⁹⁴
Mother Tongue	
English	54% ⁸⁴
French	31% ¹³⁵
Other	15% ¹⁰⁷

Age	
Average Age	48.0 ¹⁰⁴
15-34	27% ⁸⁴
35-54	35% ¹⁰⁶
55+	38% ¹⁰⁹

Born in Canada	
Yes	80% ⁹⁶

HH Composition	
Avg. # Children	1.6 ⁹⁴
0 Children	64% ⁹⁷
1 Child	20% ⁹⁵
2 Children	12% ⁹²
3+ Children	5% ¹⁰⁰

SEGMENT PROFILE: BELONGING



MOVIE PREFERENCE

Top 5 Genres Watched In

Last 12 Months

Comedy	83% ⁹⁸
Action / Adventure	78% ⁹³
Documentary	76% ¹⁰⁷
Crime / police	75% ⁹⁶
Mystery / Thriller	74% ⁹⁶

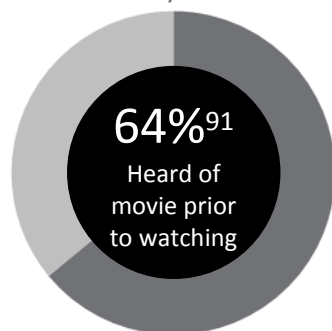
Top 5 Last Genres

Watched

Comedy	18% ¹⁰⁶
Action / Adventure	16% ⁷⁰
Family drama	10% ¹²⁵
Science-fiction	9% ⁸²
Animation	9% ¹²⁹

Movie Type Interest

Feature documentaries	55% ⁹⁵
Canadian movies	55% ⁹⁰
Foreign movies	53% ¹³³
Lower budget independent movies	46% ¹²¹
Movies from Quebec	34% ¹²¹
Big budget Hollywood movies	22% ³¹
3D movies	17% ⁵⁰
Virtual Reality	13% ⁴⁵



Movie Info Sources

TV Commercial	32% ⁹¹
Trailers/previews	30% ⁷⁹
Recommendation from family/friends/colleagues	28% ¹⁰⁰
Professional reviews by movie critics	13% ¹⁰⁸
Facebook	13% ¹⁰⁰

ATTITUDES TOWARDS MOVIES

Need States

Delight	40% ⁹¹
FOMO	24% ⁹²
Grow	21% ¹¹⁷
Idolatry	17% ⁷⁴
Movies & Chill	15% ⁸⁸
Escape	14% ⁶⁷
Bonus Features	14% ¹⁰⁰
Identity/Culture	11% ¹³⁸
Family Time	10% ⁹¹
Sensation	5% ³³
Hang	5% ⁷¹
Cash-Out	2% ¹⁰⁰

Statement Agreement

Films are often too violent	50% ¹⁰⁹
There should be more diversity, in general, in film	44% ¹⁰⁵
There aren't enough women-positive films right now	34% ¹⁰⁶
The LGBTQ community needs more content/visibility in film	22% ⁹⁶
There aren't enough films geared towards my age group	20% ¹⁰⁰
My ethnic/cultural group is underrepresented in film	15% ¹⁰⁰
Young people are not represented enough in film	12% ⁸⁶

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

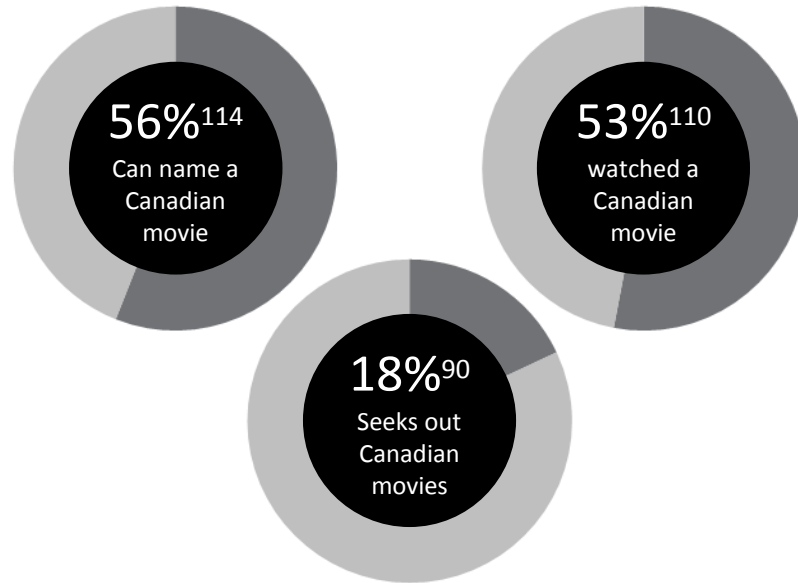
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SEGMENT PROFILE: BELONGING



CANADIAN MOVIES



Top 5 Canadian Movies

Room	6%	120
Paul à Québec	4%	200
La passion d'Augustine	3%	300
Guibord s'en va-t-en guerre	3%	150
La guerre des tuques	3%	100

Top 5 Canadian Documentaries

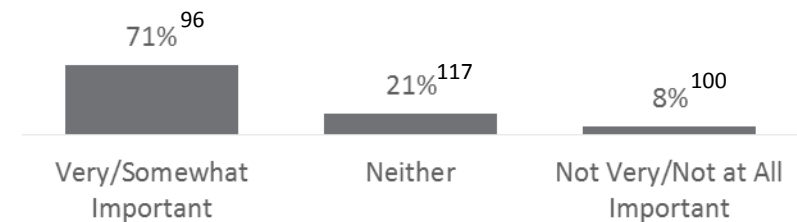
Nature of Things	4%	125
Découvertes	2%	150
Fifth Estate	2%	100
CBC/Doc Zone	1%	200
Cities/provinces/geographic areas	1%	200

TELEFILM

Telefilm Awareness



Importance of the Role of Telefilm



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

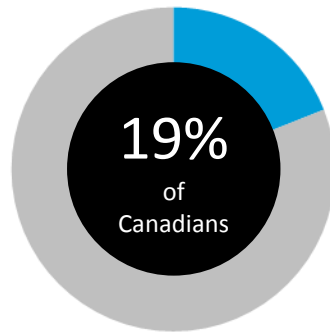
Index Base: All Respondents, n=3010

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

SEGMENT PROFILE: HOME SWEET HOME



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 ¹⁰⁰91%
Watched more movies in past 12 months ⁹⁵19%

Movie Frequency

Heavy ⁶⁶8%
Medium ¹⁰⁰43%
Light ¹⁰⁸49%

Accompanied By

Spouse/ Partner ¹⁰⁷45%
Friends ⁷¹10%
Children ¹⁰⁸12%
Extended Family ¹⁰⁰7%
Myself ¹⁰⁰32%

Movie Language

English ¹⁰⁴94%
French ⁴⁴12%

Top 5 Platforms Used

Online Streaming Service ¹⁰⁰14%
DVD/BluRay/4k player ⁹²13%
Cable/Satellite TV - standard channels ¹⁰⁰12%
Cable/Satellite TV - Movie channels ¹⁰⁰8%
Personal Video Recorder ¹⁵⁰6%

Viewing Location

Home ¹⁰³66%
Theatre/ Cinema ⁹⁶27%
Other ⁸⁸6%

DEMOGRAPHICS

Region	
BC/Terr	¹⁰⁰ 14%
AB	¹²⁷ 14%
MB/SK	¹¹⁴ 8%
ON	¹¹⁰ 43%
QC	⁵⁷ 13%
Atlantic	¹¹⁴ 8%

Gender	
Male	⁷⁸ 38%
Female	¹²² 62%
Mother Tongue	
English	¹²⁵ 80%
French	⁵² 12%
Other	⁶² 8%

Age	
Average Age	¹¹² 51.5
15-34	⁵⁹ 19%
35-54	⁹⁴ 31%
55+	¹⁴³ 50%
Born in Canada	
Yes	¹⁰⁸ 90%

HH Composition	
Avg. # Children	¹⁰⁰ 1.7
0 Children	⁸⁶ 65%
1 Child	⁹² 18%
2 Children	⁷⁵ 12%
3+ Children	²⁰⁰ 5%

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



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

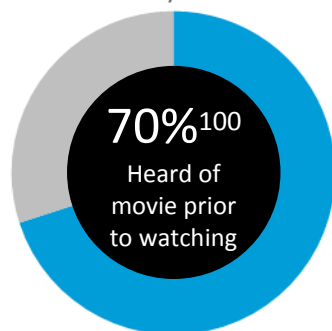
Top 5 Last Genres

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	0%	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%	¹⁰⁰
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

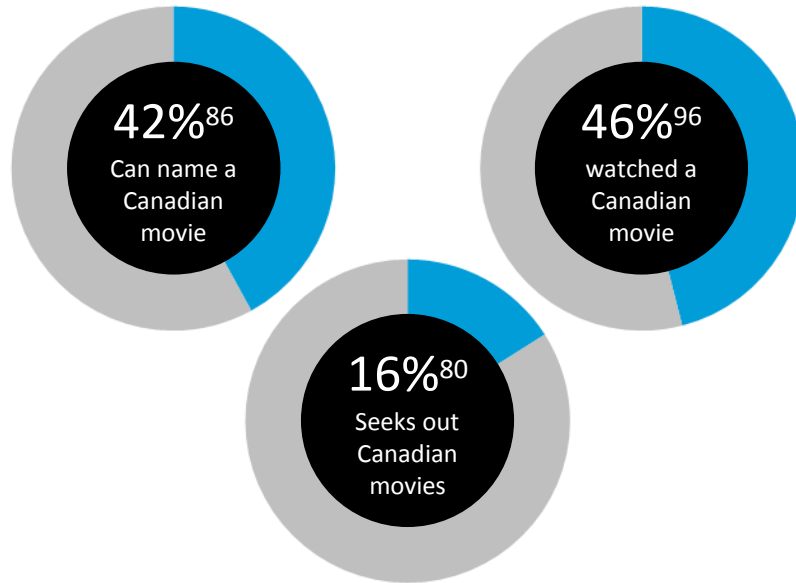
Index Base: All Respondents, n=3010

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

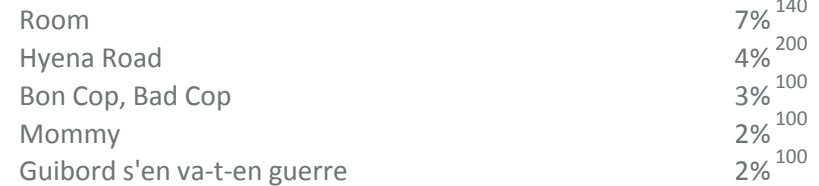
SEGMENT PROFILE: HOME SWEET HOME



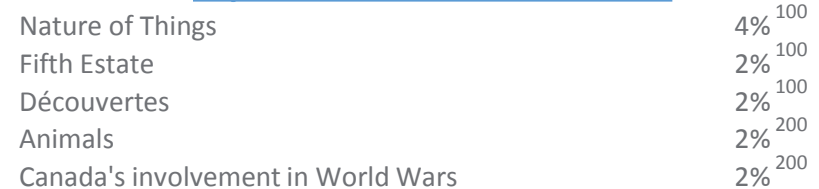
CANADIAN MOVIES



Top 5 Canadian Movies



Top 5 Canadian Documentaries

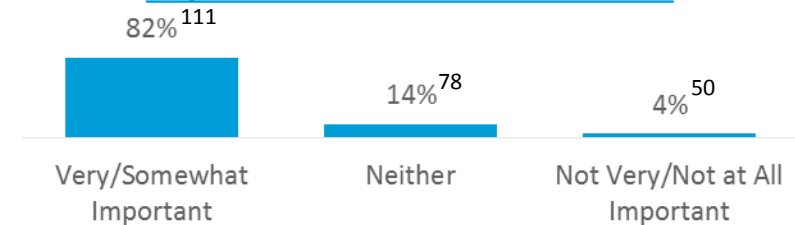


TELEFILM

Telefilm Awareness



Importance of the Role of Telefilm



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



October 2016

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

METHODOLOGY

- 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



Belonging

Toronto	n = 7
Vancouver	n = 8
Montreal	n = 6
Quebec City	n = 8



Curious

Toronto	n = 7
Vancouver	n = 8
Montreal	n = 7
Quebec City	n = 8

KEY FINDINGS & RECOMMENDATIONS

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

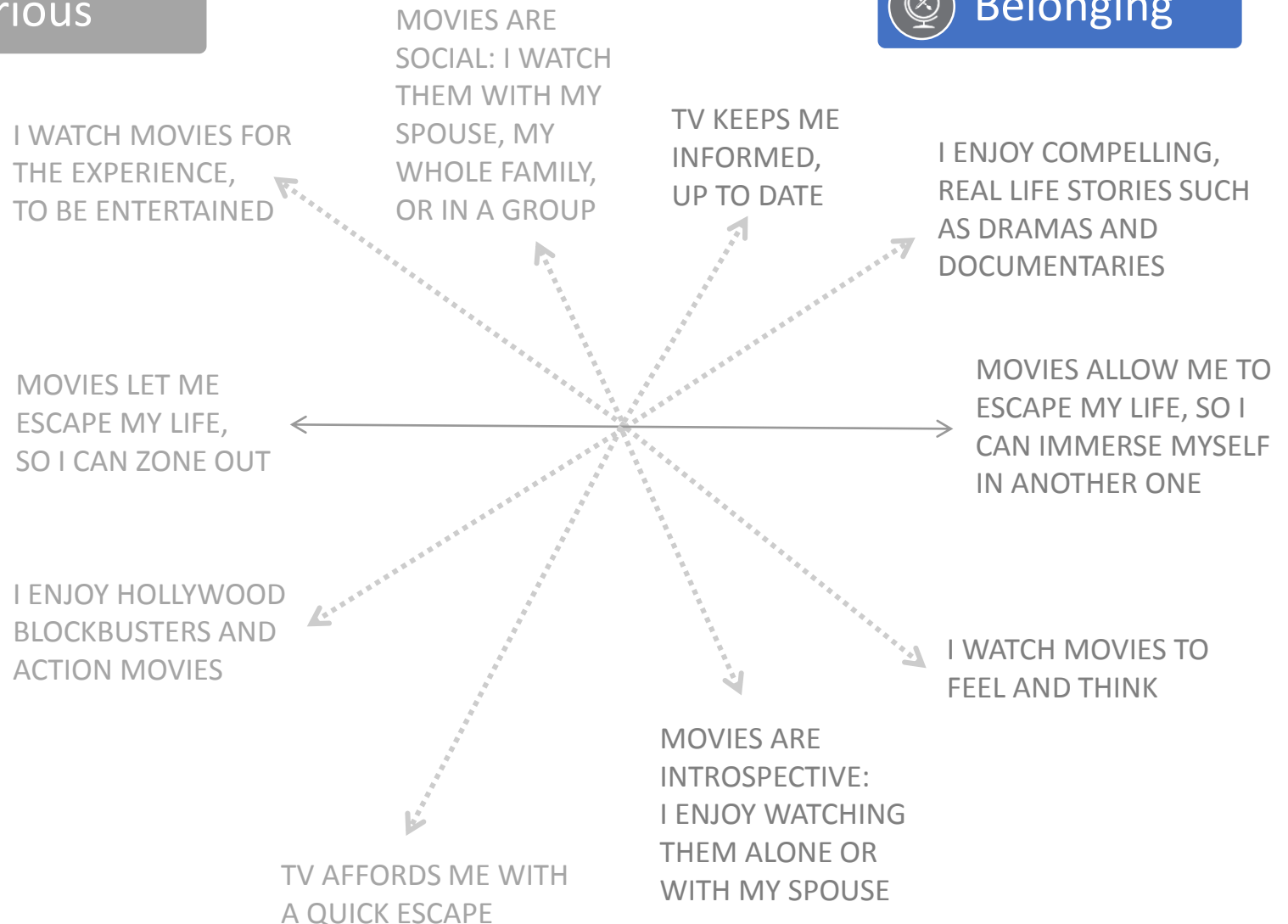
CONSUMERS FROM THE BELONGING SEGMENT WERE MORE LIKELY TO GO TO FILM FESTIVALS AND SHOWCASES

- 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



MADE IN CANADA

PERCEPTIONS OF CANADIAN CINEMA



Curious



Belonging



(words in black are for both segments)

MADE IN QUEBEC

PERCEPTIONS OF QUEBECOIS CINEMA



Curious



Belonging



(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 Historical 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**