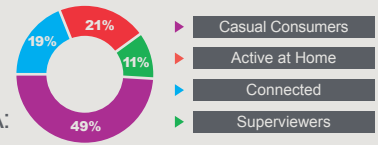


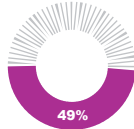
FILM VIEWING SEGMENTS IN CANADA

FOUR MARKET SEGMENTS OF FILM VIEWERS HAVE BEEN IDENTIFIED WITHIN THE FILM VIEWING POPULATION IN CANADA:



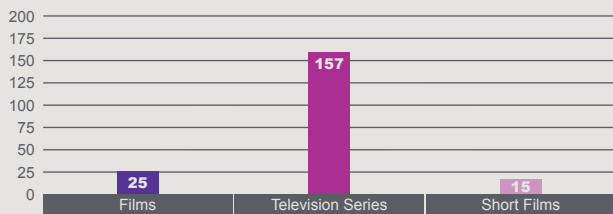
CASUAL CONSUMERS

49% OF THE FILM VIEWERS IN THE CANADIAN MARKET

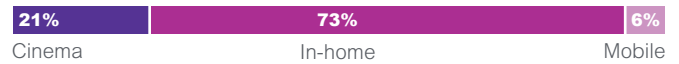


- ▶ This segment is the least active in terms of film consumption
- ▶ On average people in this segment are 49 years old
- ▶ They are less economically active, 28% are retired
- ▶ Casuals watch few films, 25 on average annually
- ▶ They have small households, with few children at home
- ▶ There are more females in this segment (56%)
- ▶ Casuals have higher levels of education
- ▶ They are more financially fortunate (43% earn more than \$80K per household)
- ▶ Word of mouth and television and radio are the sources of information used most by Casuals to select films

ANNUAL CONTENT VIEWING LEVELS



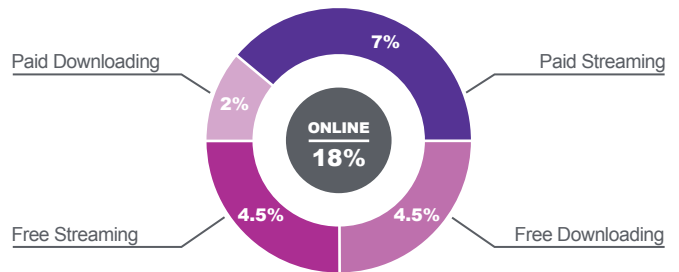
PROPORTION OF FILMS VIEWED, BY LOCATION



IN-HOME FILM VIEWING BY PLATFORM



ONLINE VIEWING, BY TYPE



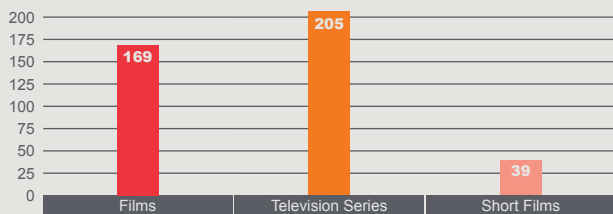
ACTIVE AT HOME

21% OF THE FILM VIEWERS IN THE CANADIAN MARKET



- ▶ This segment is the oldest of those in the four segments
- ▶ They have an average age of 51, with 44% of the segment over 55
- ▶ Many are retired, with more free time to watch movies
- ▶ Films are watched primarily at home via traditional viewing methods
- ▶ They rarely go out to movie theatres
- ▶ These consumers are watching an increasing number of movies
- ▶ 26% have household incomes under \$40K
- ▶ They have smaller households with an average of 2.4 people
- ▶ Most have college level education
- ▶ TV and radio is their principal source of information in selecting films

ANNUAL CONTENT VIEWING LEVELS



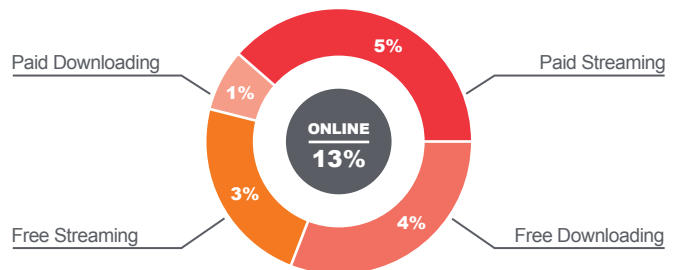
PROPORTION OF FILMS VIEWED, BY LOCATION



IN-HOME FILM VIEWING BY PLATFORM

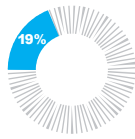


ONLINE VIEWING, BY TYPE

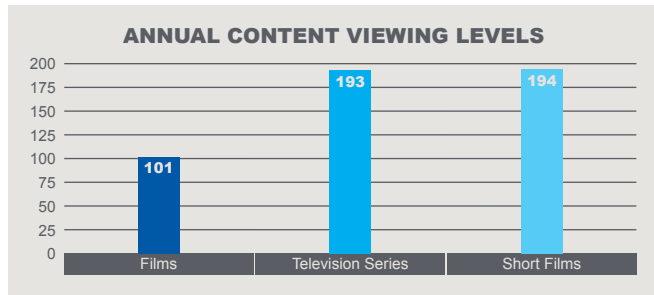


CONNECTED

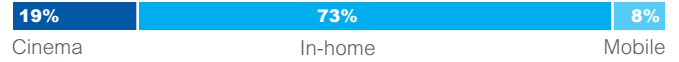
19% OF THE FILM VIEWERS IN THE CANADIAN MARKET



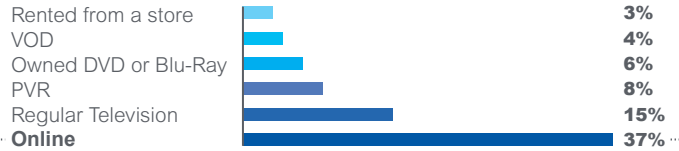
- ▶ This segment has an average age of 40, with 47% of the segment under 35
- ▶ They are heavy Internet users
- ▶ They are consuming more and more movies
- ▶ They're not very partial to VOD, PVR or watching DVDs and Blu-Rays they own
- ▶ 74% of Connecteds are economically active, 17% are students
- ▶ This group is more masculine (56%)
- ▶ 76% have household incomes below \$40K
- ▶ Households are more numerous, 2.9 people on average
- ▶ Their homes have a strong presence of children
- ▶ The Internet is their main source of information used to select films



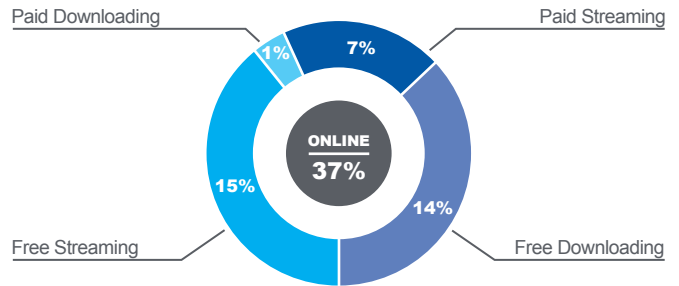
PROPORTION OF FILMS VIEWED, BY LOCATION



IN-HOME FILM VIEWING BY PLATFORM

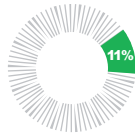


ONLINE VIEWING, BY TYPE

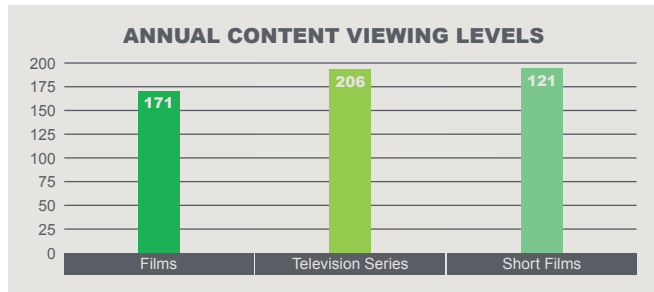


SUPERVIEWERS

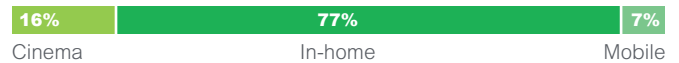
11% OF THE FILM VIEWERS IN THE CANADIAN MARKET



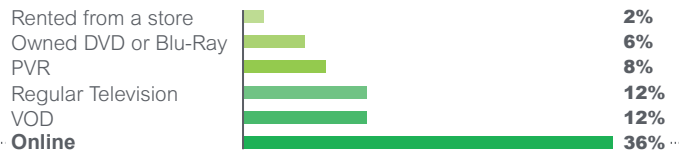
- ▶ Consumers in this segment are the youngest age group
- ▶ Their average age is 36, with more than 50% under 35
- ▶ They view all types of content, on all platforms and avidly stream and download
- ▶ Their households are more numerous, 3.2 people on average
- ▶ There is a strong presence of children in their households
- ▶ Superviewers are watching more movies than ever before
- ▶ Superviewers are more economically active, 57% work full-time
- ▶ 17% of this group are students
- ▶ This group is more masculine (56%)
- ▶ The Internet is their main source of information used to select films



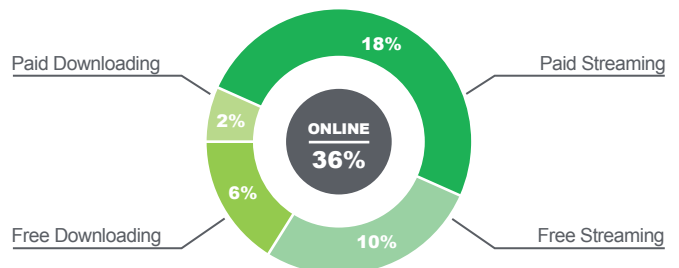
PROPORTION OF FILMS VIEWED, BY LOCATION



IN-HOME FILM VIEWING BY PLATFORM



ONLINE VIEWING, BY TYPE



Source: Findings are based on a survey commissioned by Telefilm Canada, conducted by Ad Hoc Recherche. From March 11 through March 19, 2013, 1,800 Canadians aged 15 and over were surveyed who had seen at least one film in the last year. The findings have a confidence level of 95% and a margin of error of +/- 2.31%; and the results were weighted by region, age and sex to properly represent the Canadian population.