



Film consumers in Canada

Prime Time in Ottawa 2014

February 21, 2014

Canadian Perceptions

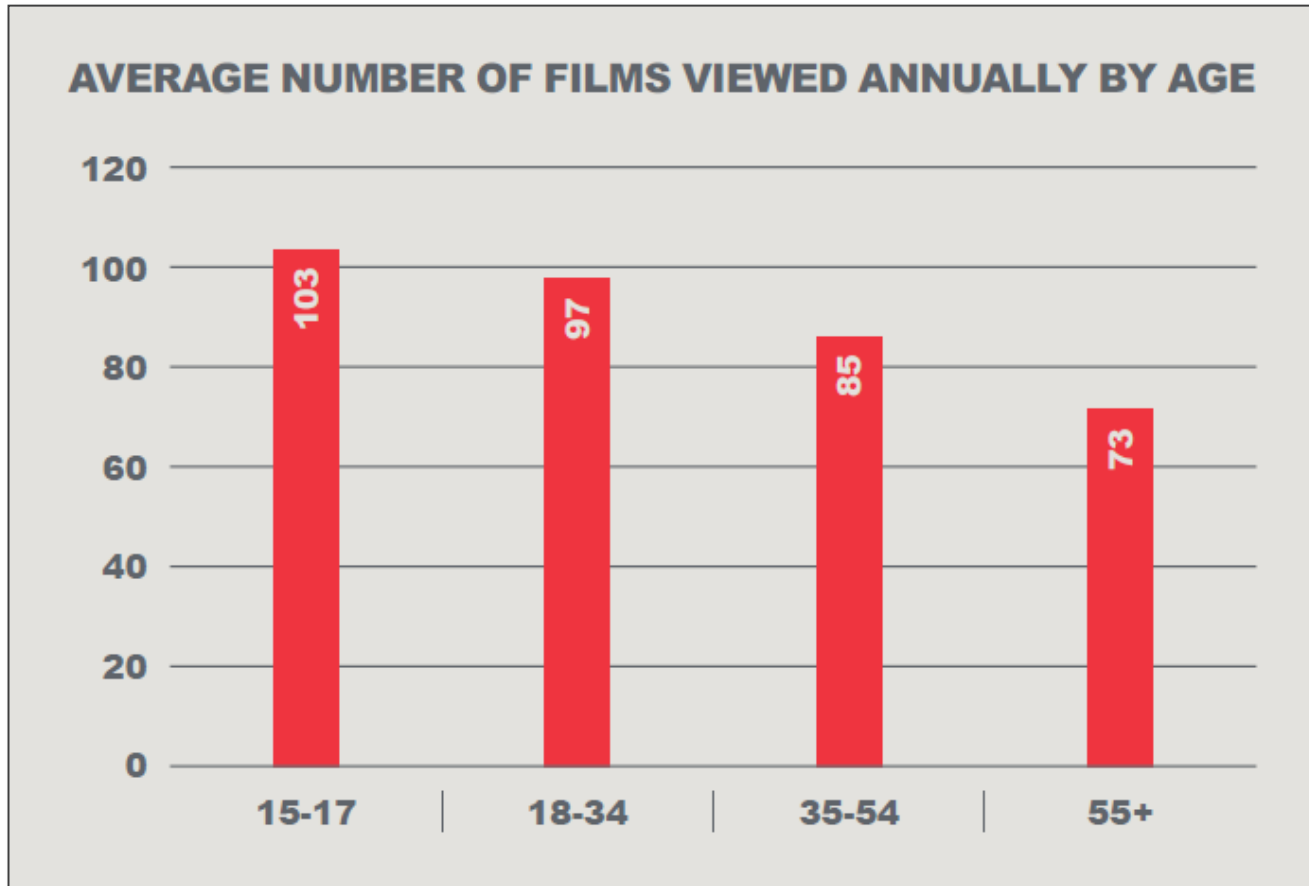
Canadian perceptions of the domestic film industry

English-speaking Canadians' perceptions improved in 2013 versus 2012:

- 66% of respondents agreed in 2013 it is important to promote Canadian films internationally, versus 57% in 2012
- Fewer respondents agreed that American film are better made: 53% in 2013 versus 61% in 2012

Behaviour of Canadians

Canadians and film – frequency of viewing



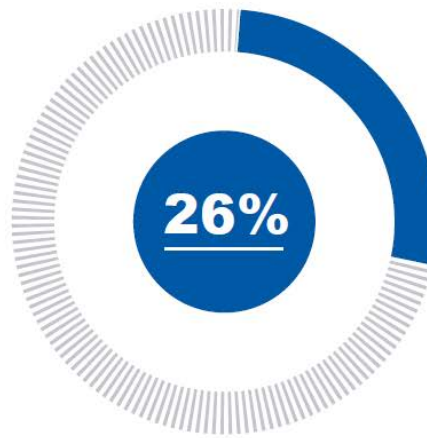
Canadians and film – viewing is increasing

Respondents reported an increase in their consumption of films: 29% of respondents reported an increase in 2013 up from 24% in 2012

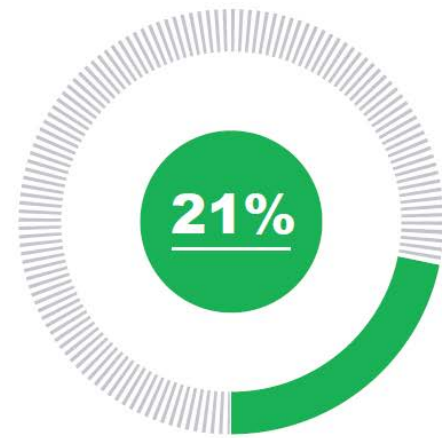
REASONS WHY CANADIANS WATCHED MORE FILMS THIS YEAR VERSUS LAST



MORE FREE TIME / MORE INTEREST



BETTER ACCESSIBILITY & SELECTION



PREFERENCE FOR DIGITAL VIEWING

Canadians and film – convenient access

The popularity of digital viewing appears to have an impact on where Canadians feel Canadian films should be made available:

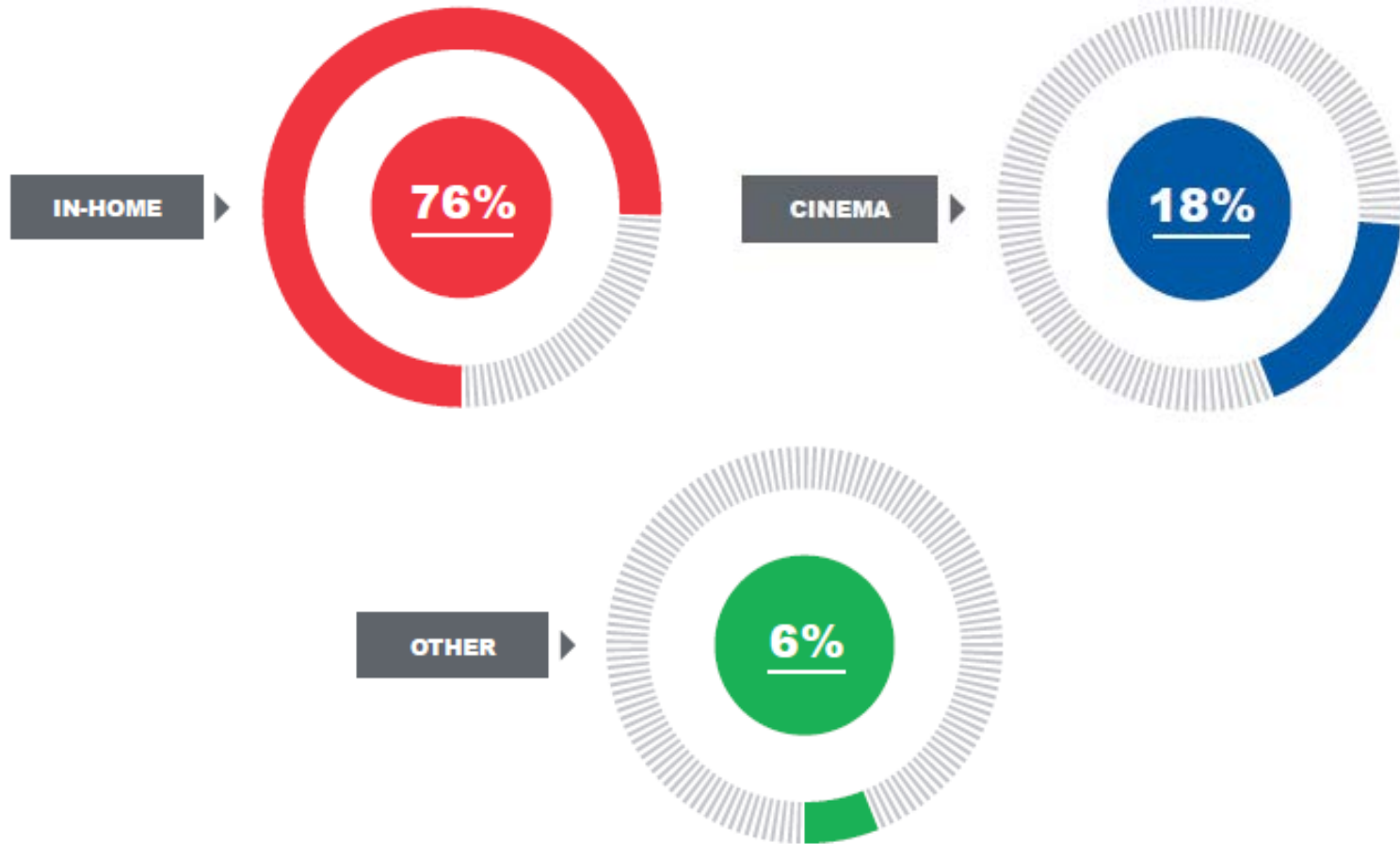
Platform	2012	2013
Online	44%	57%
Television	58%	58%
Cinema	61%	53%

Canadians and film – selecting a film

Once a Canadian has decided to see a film the genre is the key factor in their selection process.

1	Genre: (Comedy, Action/Adventure/Drama/Mystery & Police)
2	The story
3	The cast
4	Positive reviews in the media
5	Awards the film has won
6	The director
7	That the film is Quebecois
8	That the film is Canadian
9	The origin of the film
10	The producer

Canadians and film – where they watch



Canadians and film – popularity of platforms

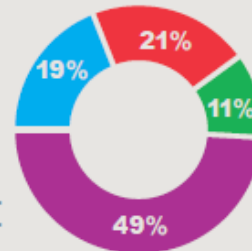
Platforms that provide more control to consumers and that are mobile are increasingly used for watching films:

Used once a week or more	2012	2013
Mobile devices	4%	9%
VOD and PPV	8%	12%
Paid streaming	14%	17%
Direct on television	49%	32%
DVD/Blu-Ray/VHS (Owned copy)	25%	19%

Film consumer segments in Canada

Film consumer segments in Canada

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

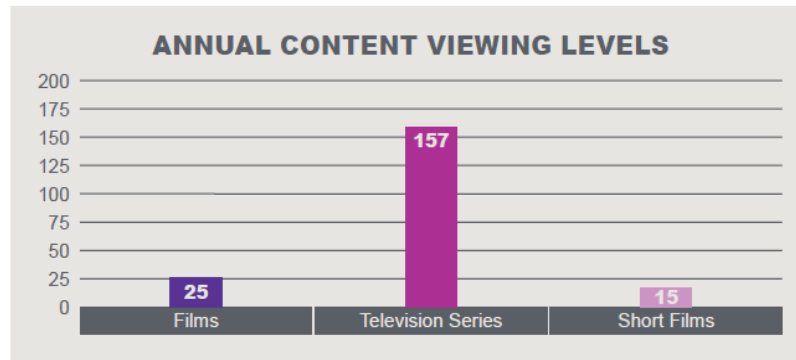
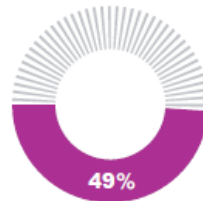


- Casual Consumers
- Active at Home
- Connected
- Superviewers

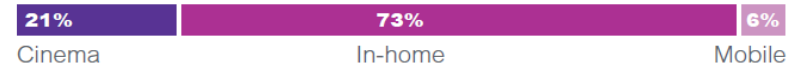
Film consumer segments in Canada

CASUAL CONSUMERS

49% OF THE FILM VIEWERS IN THE CANADIAN MARKET



PROPORTION OF FILMS VIEWED, BY LOCATION



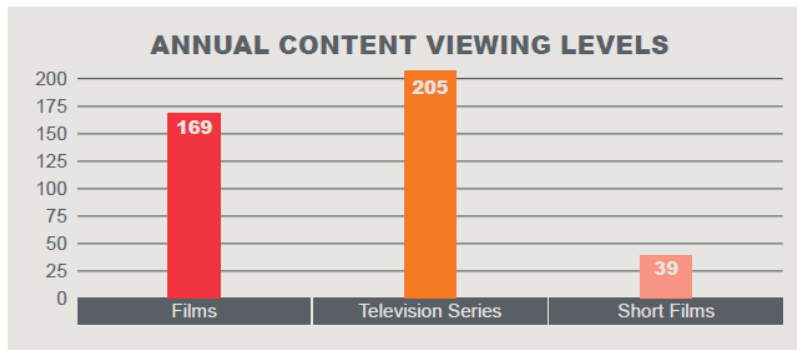
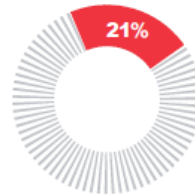
IN-HOME FILM VIEWING BY PLATFORM



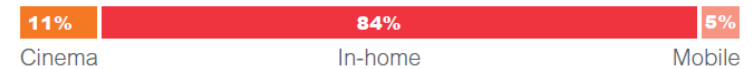
Film consumer segments in Canada

ACTIVE AT HOME

21% OF THE FILM VIEWERS IN THE CANADIAN MARKET



PROPORTION OF FILMS VIEWED, BY LOCATION



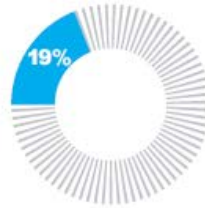
IN-HOME FILM VIEWING BY PLATFORM



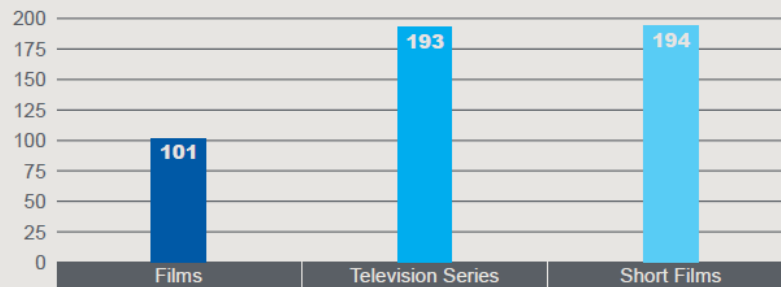
Film consumer segments in Canada

CONNECTED

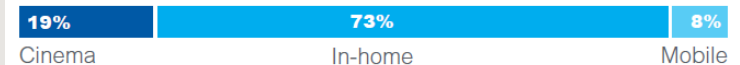
19% OF THE FILM VIEWERS IN THE CANADIAN MARKET



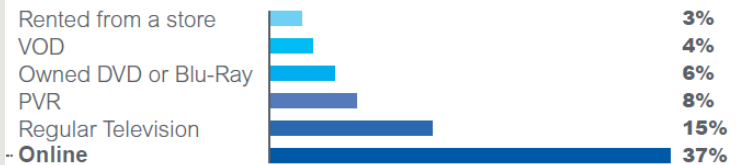
ANNUAL CONTENT VIEWING LEVELS



PROPORTION OF FILMS VIEWED, BY LOCATION



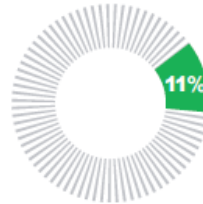
IN-HOME FILM VIEWING BY PLATFORM



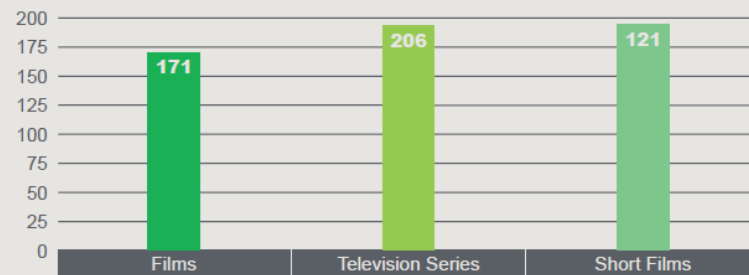
Film consumer segments in Canada

SUPERVIEWERS

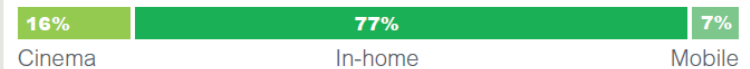
11% OF THE FILM VIEWERS IN THE CANADIAN MARKET



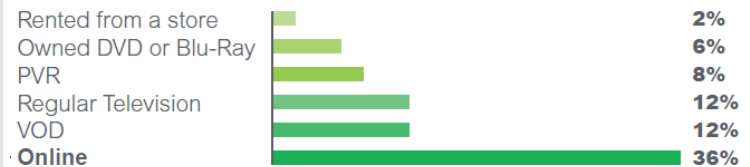
ANNUAL CONTENT VIEWING LEVELS



PROPORTION OF FILMS VIEWED, BY LOCATION



IN-HOME FILM VIEWING BY PLATFORM



TELEFILM
C A N A D A

