

UNDERSTANDING AND ENGAGING WITH THE BELONGING AND CURIOUS SEGMENTS

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TELEFILM
C A N A D A

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Québec 

Telefilm Canada is a federal cultural agency dedicated to the cultural, commercial and industrial success of Canada's audiovisual industry. On behalf of the Government of Canada, as a Crown corporation, we support dynamic companies and creative talent, providing financial support to Canadian film projects and promoting Canadian audiovisual success and talent at festivals, markets and events—regionally, nationally and around the world.

In a 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. In 2016, Telefilm retained the services of Nielsen Media to conduct consumer studies in the Canadian market.

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.

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BACKGROUND, OBJECTIVES, METHODOLOGY

BACKGROUND AND OBJECTIVES

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.

Nielsen conducted an extensive survey in July 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

EACH SEGMENT HAS UNIQUE NEEDS AND CONSUMES MOVIES DIFFERENTLY



Curious

I WATCH MOVIES FOR
THE EXPERIENCE,
TO BE ENTERTAINED

MOVIES ARE
SOCIAL: I WATCH
THEM WITH MY
SPOUSE, MY
WHOLE FAMILY,
OR IN A GROUP

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

THE THEATRE ATMOSPHERE IS A KEY DRIVER FOR SEEING MOVIES AT THE CINEMA, WHILE COST IS OFTEN A BARRIER

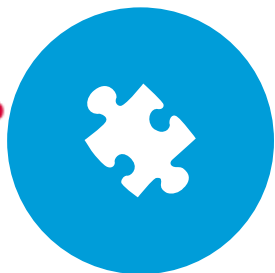
- Consumers enjoyed the movie theatre experience and seeing new films on a bigger screen with better sound. It is an activity (outing) for many
- Seeing films in a theatre was a more immersive experience than just sitting at home, and made a movie feel more like an event than a way to pass the time
- 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

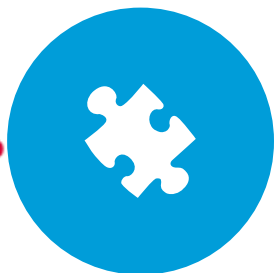
- Both segments looked for trailers to determine if a movie would be to their liking
- The **Belonging** segment was also fond of reviews on sites like Rotten Tomatoes, to gauge whether smaller, lesser known films would be worth their while
- While some appreciated the technical details professional 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

MADE IN CANADA
PERCEPTIONS OF CANADIAN CINEMA



Curious



Belonging



(words in black are for both segments)

MADE IN QUEBEC

PERCEPTIONS OF QUEBECOIS CINEMA



Curious



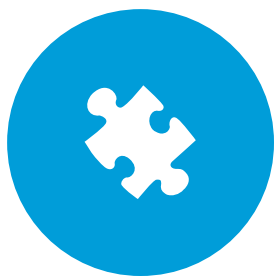
Belonging



(words in black are for both segments)

CANADIAN CINEMA IS BELIEVED TO BE UNIQUE, AND CANADA'S FILM INDUSTRY IS UNDERAPPRECIATED

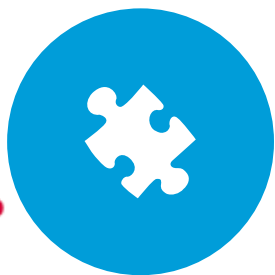
- Both segments believed Canadian films were very unique from Hollywood films
- While Canadian filmmakers were less likely to make an action film that was heavy with special effects, they did produce quality films that focused on storytelling
- These smaller, intimate and introspective stories were especially 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

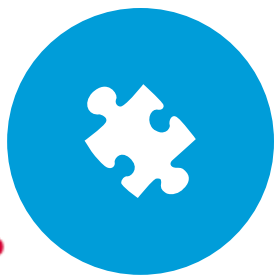
- While no one argued that Canada produces films with well told, quality stories, the lower production budgets available to Canadian filmmakers made some consumers feel Canadian films looked lower in quality, limited the genres made here, and affected the talent pool that was drawn to them
- This issue 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 MARKETINGED AND IS SOMETIMES HARD TO IDENTIFY

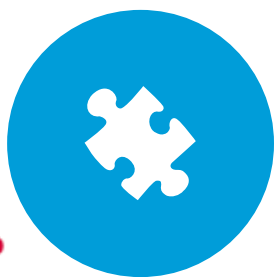
- While the Canadian film industry is thriving, particularly in Vancouver where several mentioned seeing film crews in their streets, some feel Canadian films rarely play at their local multiplex, aren't marketed as Canadian, or are difficult to identify as such
- Some discovered Canadian films randomly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

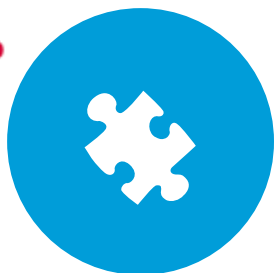
- Awareness of Telefilm was a touch stronger with the **Belonging** segment, particularly in Quebec City, where there was more knowledge about how films get financed
- Many from both segments described Telefilm's mission as valid and necessary
- While they generally agreed with the idea of promoting 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 assuaging 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

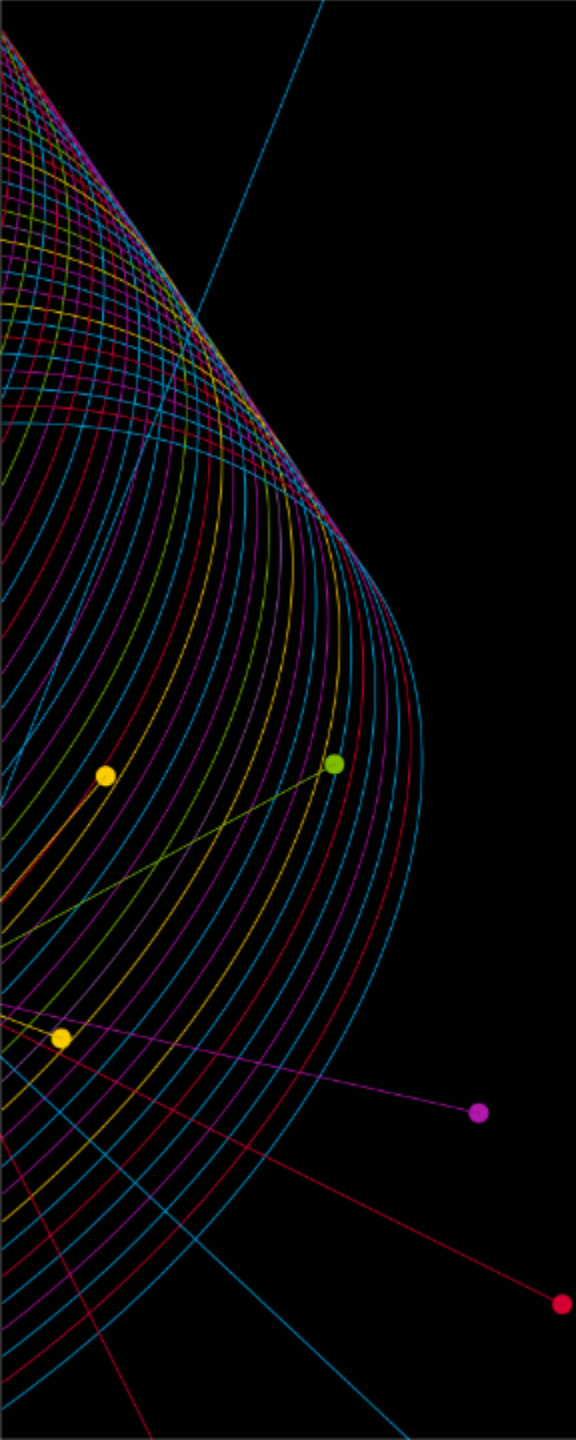
CONSUMERS ARE OPEN TO MORE DIVERSITY IN FILM AND SEEING CANADIAN TALENT PROMOTED, BUT SUCH STRATEGIES MUST BE APPROACHED CAREFULLY

- Promoting **diversity** was generally seen as a bold and ambitious step forward, which would also help bring forth unique ideas and original stories
- Many however, felt this focus on diversity seemed somewhat forced or too politically motivated, suggested all cultures were equally deserving of attention, or believed only projects that had the most likelihood to succeed should be funded
- They had similar opinions about promoting **gender** – while some believed women were unfairly, underrepresented in film, others disliked what they interpreted as “quotas” that would recognize a filmmaker’s gender, and not their work or talent
- While they often believed that promoting **talent** was more in line with what Telefilm should be doing, and that this was more inclusive and less political, some felt there was nothing new about this mandate, or that it wasn’t very exciting or newsworthy



- Ensure the wording of any funding/promotional efforts are less focused on what might be seen as political, and more centered on the idea that projects were selected because they’re “best of the best”
- Consumers do generally believe it is important to promote diversity and gender, but they do not want to see this done at the expense and sacrifice of creative projects that do not fit into these boxes

DETAILED FINDINGS





VIEWING HABITS & CONSUMPTION

TRADITIONAL TV IS OFTEN AN ESCAPE FOR THE CURIOUS SEGMENT, WHILE THE BELONGING SEGMENT WATCH TV TO STAY INFORMED



Curious

- 8-10 hours of TV each week on average
- They watch less news but a larger variety of programming: sitcoms, drama, cooking competitions, nature shows
- Several tune in to televised sports
- TV is readily available and comforting
- It offers a quick escape after a long day, when they might tune into a favorite show or watch something funny



Belonging

- 15-17 hours of TV each week on average
- Several watch the news daily to stay informed and to know what's going on
- They prefer TV dramas over sitcoms
- They view sports and turn to TV for content that is unavailable elsewhere

VIDEO ON DEMAND IS NOT A PREFERRED OPTION FOR EITHER SEGMENT



Curious and Belonging



- Used sporadically when there's nothing interesting on TV or Netflix, or as a treat; purchases are typically made a couple of times a month at most
- Typically used to catch up on missed episodes of a TV series versus renting a film
- Available movie content is said to be stale, outdated, and somewhat boring
- Offers the convenience of watching on demand, on their own schedule, but is also a more expensive option
- Outdated and slow technology, and menu navigation that wasn't very user friendly were often cited as other barriers for not using VOD

BOTH SEGMENTS ARE ENAMORED WITH **STREAMING** BECAUSE OF THE VARIETY AND CONVENIENCE OFFERED



Curious

- Many from this segment stream both TV shows and movies, and do so either every day or once or twice a week
- They appreciate the larger variety available and being able to find something that interests them
- Its convenience is also attractive, particularly being able to pause and walk away, or come back to something at a later date, or watching content on a number of different devices
- The higher video quality of the programs streamed was another benefit



Belonging

- Most stream the same content, and do so at a similar frequency, but are more likely to binge watch
- They also tune into shows unique to this platform (House of Cards) or content that has flown under the radar, though this can be a hit or miss experience
- They appreciate the convenience of watching something on their schedule or on different devices, the larger catalogue, and that there are no ads
- The ability to discover new content and receive suggestions are other pluses, and encourage them to take more risks when selecting a movie or TV show

BOTH SEGMENTS ALSO USED SITES LIKE YOUTUBE VERY FREQUENTLY AND OFTEN SOUGHT THE SAME CONTENT



Curious

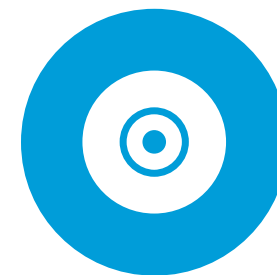
- Most visit these websites and spend significant time there every day
- While this segment used these sites to listen to music and view DIY videos, they also watched sports videos, and “best of” clips from TV shows
- Some were particularly fond of the specialty channels they found here, which allowed creators to produce unique and entertaining content
- They often shared the content they found with friends, and interacted with creators by leaving comments
- This platform was also appreciated for its immediacy and ease of searching



Belonging

- Many also watch videos on YouTube or Facebook and view content there daily
- Several use these sites to listen to music, while a few look for educational content (recipes, short classes), or catch up on TV shows by watching clips
- A few others looked for movie trailers
- Consumers liked the variety of content available and that they could watch on a number of devices (phone, tablets)
- This segment also liked the sharing aspect, though mentioned this less often than those in the Curious groups

SEVERAL CONSUMERS FROM BOTH SEGMENTS STILL BUY AND WATCH MOVIES ON DVD



Curious and Belonging



- They typically watch holiday classics seasonally, or turn to their movie collection when the mood strikes; watching old favorites again and again is comforting
- A few have built up a collection of films, or purchase special director's cut editions (the Lord of the Rings trilogy)
- A few rented DVDs from libraries, or purchased them at discounters like Walmart, making them an affordable entertainment option
- A few said they viewed DVDs on planes and trains during especially long commutes
- A small few are old school and uncomfortable with new technology, and even have functional VHS players and tapes at home

IN THEIR OWN WORDS



Curious

"I like the concept of finding what you like and getting those type of videos."

"I watch almost all of my movies through online streaming services."

"You are not restricted to certain times to watch things when streaming, and you can pause it."



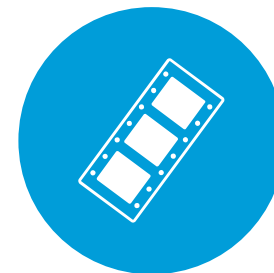
Belonging

"I was at a friend's house watching Sherlock on Netflix. We were there from 8 pm to 6 am. We were all still awake after 10 hours."

"Sometimes, you discover interesting things on Netflix that sometimes went under the radar."

"YouTube is like an unhealthy obsession that lets you see the worst of internet. But sometimes things are relevant, like some documentaries."

THE CURIOUS SEGMENT WATCHED MOVIES FOR AN **ENTERTAINING EXPERIENCE**, WHILE THE BELONGING GROUPS HOPED MOVIES WOULD MAKE THEM **FEEL AND THINK**



Curious

- Movies offered excitement, fun and exhilaration, and took them to fantastic worlds and situations
- Movies were also an escape for them, but more so to relax and de-stress
- They were more likely go to the latest superhero blockbuster or action flick than consumers in the Belonging groups, and seemed less picky about what they watched
- The movie-going experience was also as important as the films they were watching – they relished the big screen, big sounds, the special effects, the theatre atmosphere, and the popcorn



Belonging

- Movies exposed them to real life stories, new perspectives, and the cultures and world around them
- Movies offered an escape, but also allowed them to let their emotions go, immerse themselves in the story, and feel something or make them think
- They often sought films with compelling stories and characters, and preferred content that was believable to blockbuster films with special effects
- They were more likely to watch a drama, thriller, or a foreign or obscure films than those in the Curious segment

WATCHING MOVIES WAS MORE **SOLITARY AND INTROSPECTIVE** FOR THE BELONGING SEGMENT, WHILE THE CURIOUS CONSUMERS VIEWED IT AS A **SOCIAL ACTIVITY**



Curious

- Few watched movies alone – they were often on a date, with friends, or with their whole family, and movies were part of a shared evening
- While some enjoyed watching films at home because it was more affordable and more comfortable, theatres were generally preferred by the Curious
- Big budget action and sci-fi films were typically watched on a big screen, where special effects and sounds were highlighted, as were comedies that benefited from audience reactions
- Quite a few also indicated that they watched films across genres at the theatre, and then again when they became available for home viewing



Belonging

- They often watched movies alone or with a spouse or loved one; few went to see movies in a group
- They preferred to watch their favorite genres where they could focus on the film and have few distractions, whether at home or at a not-so-crowded theatre
- This was true for historical dramas, suspense, docs, and foreign films, but less so for blockbuster movies that looked better on a big screen
- Smaller, lesser-known indie films were typically watched from home, as paying full theatre prices was sometimes risky

IN THEIR OWN WORDS



Curious

"Movies give me a chance to escape reality and escape for an hour. During that time, you don't think about your kids, your job, or anything else."

"I'll see the films based on my mood. On a Friday night, I want to put my brain on off and want to laugh more."

"(Action films) have to be in the theatre, with a big screen, big sound, and special effects. I like to rekindle my memories of reading comic books and see how it comes alive on the screen."



Belonging

"I like movies that are more realistic, that look at what is found in everyday life, and do not try to impress with too much eye candy."

"I like the opportunity to immerse yourself in a story that you wouldn't think of yourself or imagine, just to escape and see how someone else sees things, and to be thrown into that life."

"I feel like the best movies give you perspectives that you have never seen before ... they give you experiences you have not experienced ... they make you think, and make you experience things."

"If it is a tragedy, I want to be left crying, and if it's a comedy, I want to laugh."

BOTH SEGMENTS APPRECIATED SEEING FILMS ON THE BIG SCREEN, BUT THE COST AND BEHAVIOR OF OTHER PATRONS MADE THE MOVIE THEATRE EXPERIENCE LESS ENJOYABLE



Curious

LIKES

- Bigger screen, better sound
- The immersive atmosphere of a dark theatre helps pull you into the movie
- A nice family activity with the kids
- See films that are new, just released

DISLIKES

- It is expensive
- Films are sometimes sold out
- Noisy people, talking, using phones
- Cannot pause the movie
- Less comfortable than being at home



Belonging

LIKES

- Bigger screen, better sound
- You can immerse yourself; there are no distractions you would find at home
- Feels special; you are out of the house
- See films that are new, just released

DISLIKES

- It is expensive
- Crowds, long lines, poor choice of seats
- People talking, using phones, snoring
- Dirty, sticky floors
- Loud sounds, effects can be deafening
- Inconvenient show times
- Requires more planning/organization when you have children

THE CURIOUS SEGMENT OFTEN CHOSE MOVIES BASED ON TRAILERS AND WHAT WAS FAMILIAR TO THEM, WHILE THE BELONGING GROUP DELVED DEEPER BY READING REVIEWS



Curious

- Most look for trailers, which provide a quick taste of what a film is about
- Several seek the familiar – sequels, or films based on comics/books they read
- Quite a few are pulled in by specific actors or directors that they appreciate
- Others learn about movies when looking for show times or buying tickets online (Cinnoche, Cineplex)
- Fewer look to reviews to help choose films, with some suggesting they don't trust the opinions of professional critics
- A few read magazines found in theatres
- A few others simply use the aggregate scores/stars a film receives on sites like Rotten Tomatoes and Netflix



Belonging

- Many read reviews on sites like Rotten Tomatoes, from professionals and the public alike, to choose a film
- Several learn about new movies by watching trailers online
- Others are drawn to particular films by the cast or the directors they like
- Some read movie magazines, especially the free ones found in theatres
- A few look for synopses when looking at show times (CinemaClock) or on IMDB
- Some use the suggestions provided by Netflix, or look at the star ratings
- A few rely on word of mouth

IN THEIR OWN WORDS



Curious

"I don't read the reviews because everyone is different. I just go by the way I judge it by seeing (the trailer)."

"Magazines keep me up to date with all the movies and what's popular."

"I go to the films that we hear more talk about, which are usually big productions."



Belonging

"Sometimes I don't want the movie to be spoiled, so I will read a well written review and not watch the trailer."

"Rotten Tomatoes has a large number of critics that submit their reviews, and you can see what the common person thinks of it as well, and you can get a couple of different perspectives."

"IMDB leads you to movies you might not have heard of, and lets you do some due diligence before you waste your time."

THOSE IN THE BELONGING SEGMENT WERE MORE LIKELY TO GO TO A **FILM FESTIVAL** VERSUS THE CURIOUS CONSUMERS



Curious

- Only a few from this segment went to see movies at film festivals
- Festivals created the opportunity to see obscure films they would not be able to find elsewhere, and maybe hob nob with celebrities attending premieres
- Many others, however, did not want to risk money and take a chance on smaller films, or simply did not have the time to explore such events



Belonging

- Several, particularly from Toronto and Vancouver, had been to a film festival
- They appreciated the chance to catch limited engagements that would not be shown in mainstream theatres
- Festivals also provided them with an opportunity to discover foreign films and small indie features, and meet filmgoers with similar tastes
- Some, however found tickets to these special screenings too expensive
- Others felt they lacked organization with unclear websites, or disliked the complex processes to purchase tickets

THE BELONGING SEGMENT WAS ALSO MORE LIKELY TO ATTEND A **SHOWCASE** THAN THEIR CURIOUS COUNTERPARTS



Curious

- While fewer in this segment physically attended a showcase or similar event, several suggested they sometimes create their own showcases at home
- Some held horror movie marathons near Halloween, introduced their kids to classic trilogies (Back to the Future), or watched a bunch of favorite films while they were down with the flu



Belonging

- Several from this segment expressed greater interest in these types of events than those in the Curious groups
- Some suggested they had attended Q&A screenings that featured lesser known directors, went to day-long movie marathons in theatres, attended a series of outdoor screening, or watched a selection of curated films (1980s teen angst films) on television

IN THEIR OWN WORDS



Curious

"My girlfriend had festival tickets and we had the opportunity to see a movie that I would have otherwise seen at home. But on the big screen, it was fabulous."

"I love to learn about different cultures, to see how they live, what they like, see the different colors and the music. It can be inspiring."

"I don't have an infatuation with (being on time when a movie starts), so all the lining up and the screaming doesn't appeal to me at all."



Belonging

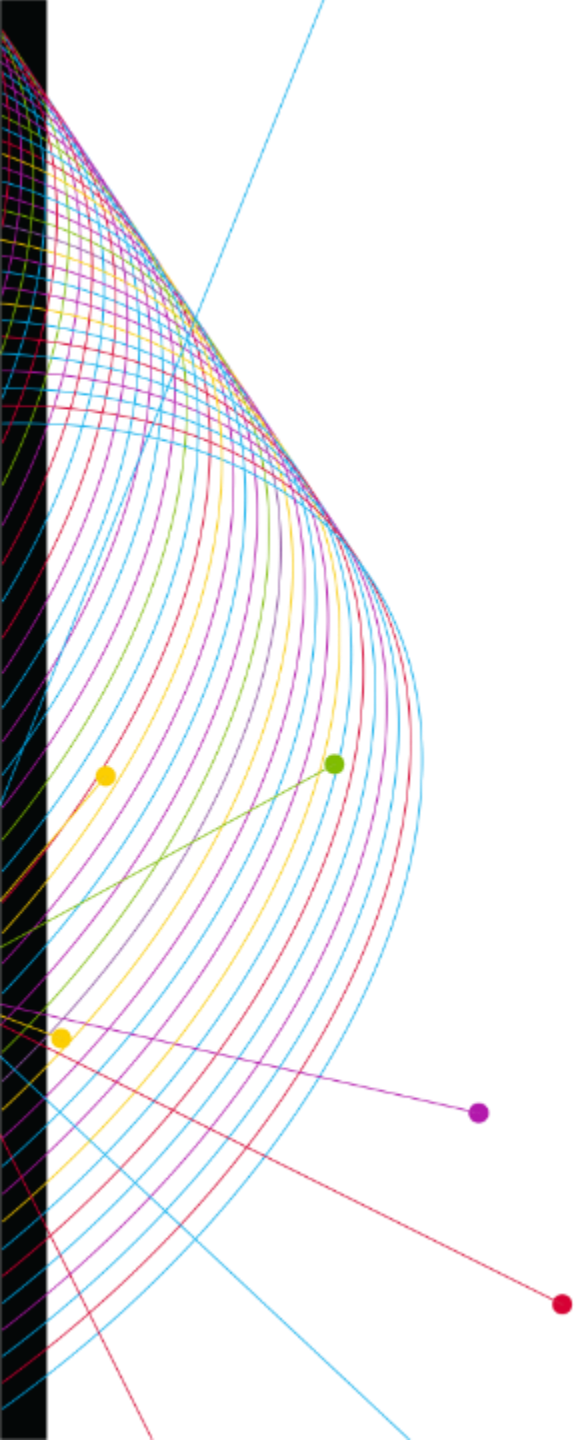
"It is hard to track down what is happening at a festival and ordering tickets."

"Festivals let me see different films I wouldn't necessarily go to, but I'm usually more entertained by."

"There are normally movie buffs at festivals as well, and we have good conversations."

"There was a showcase a while ago with John Hughes movies and all the 1980s movies. It was great."

IMAGE OF CANADIAN CINEMA



MADE IN CANADA:

THE BELONGING GROUPS SEEMED MORE KNOWLEDGEABLE AND APPRECIATIVE OF THE TYPE OF FILMS MADE HERE, WHILE THE CURIOUS SEGMENT DISCUSSED **CANADIAN FILMS** MORE SUPERFICIALLY



Curious

- The industry is thriving – there are more Canadian films and TV shows being made than there were 20 years ago, and many American movies are filmed here
- They feature great up-and-coming actors and directors who have gone to make it big in the United States
- Canadian movies are usually very well written and tend to be real-life stories
- Canadian films are inward looking and a little more self-conscious



Belonging

- Canadian cinema tells smaller, more intimate stories than Hollywood does
- The movies made here are more thoughtful and introspective; they make you reflect and think
- Seeing Canadian film instills you with a sense of pride, and makes you realize Canada has a very talented film industry
- Canadian cinema is underappreciated
- The Canadian films made here are often set in Canadian cities, unlike foreign productions that are shot here, which use Toronto or Vancouver as stand ins
- Canadian films do not shy away from using quirky and ordinary looking actors

WHILE BOTH GROUPS FELT LOWER BUDGETS LIMITED THE TYPES OF FILMS MADE IN CANADA, THE CURIOUS SEGMENT WAS ALSO MORE CRITICAL AND LESS ENTHUSED ABOUT THEIR CONTENT



Curious

- Canadian movies are not “light and frothy”, do not have superheroes, lack big special effects, and make it difficult to watch as a form of escapism
- They have much lower budgets, which can affect their overall look and quality, and makes it difficult to draw known, big name actors to them
- The stories they tell are often boring, dull, corny, and not very exciting
- They are usually set in small, rural towns or filled with landscapes that pushes Canada or its culture
- They feel rushed and thrown together
- A few in Quebec felt some films were poorly dubbed, which affected their appeal and how they were received



Belonging

- Canadian movies are not commercial; they are not summer blockbusters, or action films with lots of special effects
- Canadian cinema is not well funded, and is forced to work with lower budgets, which can affect how they look and feel
- Canadian films are not always successful at the box office, have limited releases, or end up going straight to video
- Canadian films often rely on the same themes (they are angst filled and bleak) and the same subjects (hockey)
- Quebec consumers often believed it wasn't very easy to distinguish between Canadian and American films

MOVIE STIMULI: TORONTO, VANCOUVER



MOVIE STIMULI: MONTREAL, QUEBEC CITY



THE BELONGING SEGMENT WAS SOMEWHAT MORE AWARE OF THE RECENT CANADIAN FILMS AND MORE IMPRESSED THEY WERE CANADIAN



Curious

- **Bon Cop Bad Cop** and **Room** had been seen the most by the Curious segment, with others in these groups often recognizing **Forsaken** or **Mirage**
- Quite a few expressed surprise learning these films were Canadian because they seemed like “world class” films
- Others were generally underwhelmed, and suggested these movies “looked too Canadian” and were either “too artsy” or not mainstream enough to get their attention at the movie theatre



Belonging

- **Bon Cop Bad Cop** and **Room** were also the most recognized films on the collage for the Belonging segment
- **Forsaken** and the **F Word** were more familiar in English Canada, while **Remember** and **La Passion D’Augustine** were often recalled in Quebec, though few from Quebec could name Canadian films or directors unaided
- Several were equally surprised to learn these movies were Canadian, particularly **Room**, which received both critical and international acclaim
- Some suggested there was no clear way to tell that some of these movies were Canadian, outside of recognizing a few Canadian actors

RESPONDENTS FROM QUEBEC WERE FANS OF QUEBECOIS CINEMA AND GENERALLY EXPRESSED GREAT PRIDE IN THE FILMS MADE THERE



Curious

- While the Quebecers in this segment were also well aware of Quebec films, they often touted the many comedies Quebec produced each year
- They also had a great admiration for seeing films that were closer to home, in their language, and used local talent
- While they often expressed pride in the films made in Quebec, which gave them a sense of belonging, they also felt some Quebec films had heady themes and lower budgets, which was less appealing
- Consumers from outside Quebec felt these films were in their own category and different from Canadian films, as they resorted to more sex and violence, and tended to push the envelope



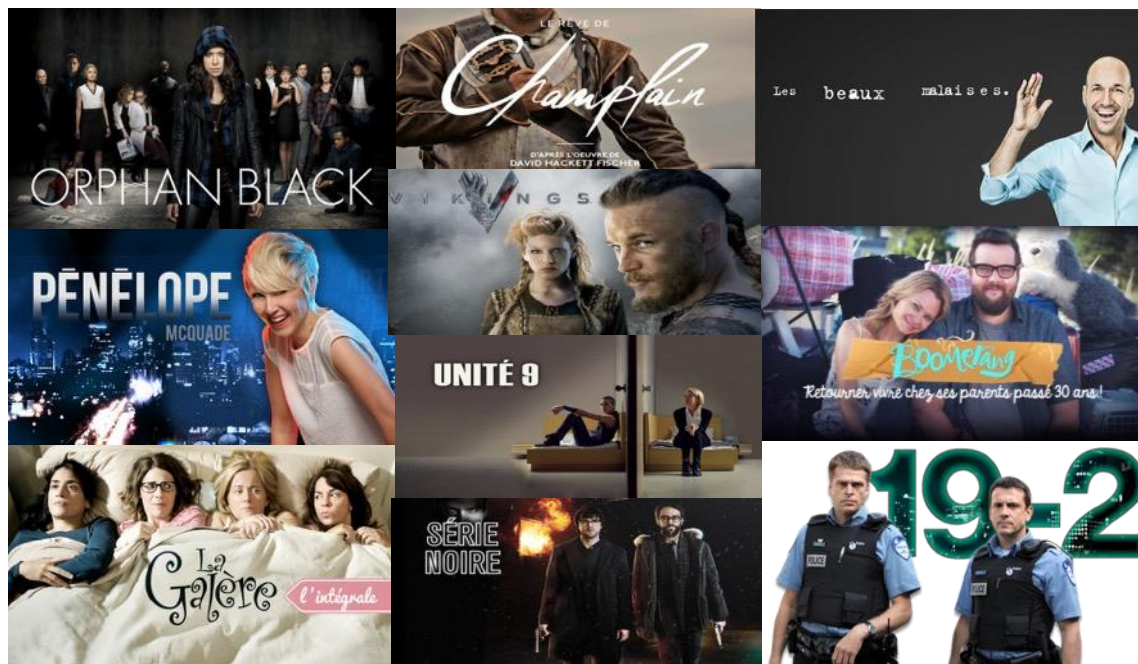
Belonging

- Quebecers were familiar with both older Quebec films and recent releases
- They generally felt the Quebec film industry had grown tremendously over the years, and had emerged with better stories, actors, and increased quality
- They believed Quebec filmmakers told beautiful stories, but also took more risks to make films that were avant-garde and tackled more daring subjects
- Respondents from English Canada typically described Quebec films as more European and different from the rest of Canada, but also somewhat slower moving

TV STIMULI: TORONTO, VANCOUVER



TV STIMULI: MONTREAL, QUEBEC CITY



MOST FROM EITHER SEGMENT WERE VERY FAMILIAR WITH THE COLLAGE OF **CANADIAN TV PRODUCTIONS** THEY WERE SHOWN



Curious and Belonging



- **Vikings**, **Dragon's Den**, and **Schitt's Creek** were familiar in English Canada, while **Les Beaux Malaises**, **Unité 9**, **19-2**, and **Boomerang** had fans in Quebec
- A few were quite surprised and impressed to learn that **Vikings**, with its large-scale production, was Canadian, but were otherwise aware these were Canadian shows based on their familiar Canadian casts, perceived quality due to their lower budgets, and their overall tone
- Many from the Curious segment in English Canada suggested they were not very enthused by these shows – a few said **Schitt's Creek** wasn't very funny and annoyed them, while others said these show were not ones they would typically tune into

CONSUMERS FROM BOTH SEGMENTS BELIEVED **CANADIAN FILMS** WERE HARD TO FIND AND NEEDED MORE MARKETING



Curious

- Many felt Canadian films needed more marketing – Canadian films were poorly distributed, hard to find, and typically screened in small theatres
- Others found them hard to identify, outside of their Canadian casts, and felt they had to be better positioned as Canadian works when they first hear about them



Belonging

- Many equally believed Canadian films were in limited supply, lacked distribution and were not readily accessible, not advertised very well, and not marketed as being from here
- Quite a few suggested watching Canadian films just happened; they selected a film based on other elements and were pleasantly surprised to discover it was made in Canada
- Other consumers, particularly from Quebec, found them hard to identify – there were no clues, such as maple leafs, to highlight Canadian films in trailers, ads, or on the images/posters shown on Netflix and other sites

THE BELONGING SEGMENT WAS MORE OPEN TO WATCHING CANADIAN FILMS THAN THE CURIOUS GROUPS, WHO OFTEN OPTED FOR OTHER MOVIES WHEN GIVEN THE CHOICE



Curious

- While several felt guilty about not seeing more Canadian films, or being more knowledgeable about them, only a few seemed eager to really do so
- Many admitted that they had short attention spans that prevented them from immersing themselves in Canadian films and stories, or felt past attempts had been a waste of their time
- They often suggested they placed more value on higher quality production aesthetics with bigger budgets, and stories that allowed them to escape
- Others felt Canadian films simply got lost in the shuffle among the vast choice and variety of channels available today



Belonging

- Several found the idea of watching movies that were relatable and based on “our stories” appealing
- They believed Canadian film should distinguish itself by being unique and original, and not mimic American films
- Some felt it was important to support the industry by watching local films
- Several others, however, felt that while knowing a film was Canadian might sway them choose it (if all other factors were equal), they would normally choose a film based on what the story was about

IN THEIR OWN WORDS



Curious

"It feels like every Canadian movie I have watched tells you in every scene they are in Canada, and they don't let the narrative unfold and play itself out."

"Most of the Canadian movies I've watched seem to be documentaries and they are typically well done but not that exciting."

"I feel I should pay more attention to what Canada has to offer in terms of movies."

"I just look for good movies because I don't want to waste my money or my time."



Belonging

"I think they tend to be a little more thoughtful than what Hollywood puts out."

"Canadian movies have smaller more personal stories, are more off the beaten path, quirkier."

*"We are not exposed to them.
I am sure there are good films,
but we have no idea.
I cannot name a Canadian director."*

"As far as film goes there isn't enough Canadian film, and I don't hear or see enough about them."

"I get satisfaction knowing that there are quality productions and acting here, with very good storylines, but it doesn't have the funding to get out there like Hollywood films."

"There is no brand identity to Canadian films, but there should be."



AWARENESS AND ROLE OF TELEFILM CANADA

ALTHOUGH SOME HAD **HEARD OF TELEFILM**, FEW COULD DESCRIBE THIS AGENCY'S PURPOSE WITH CERTAINTY



Curious

- Only a few were aware that Telefilm financed or subsidized the production of films in Canada
- Others suggested it produced made-for-TV movies or documentaries
- A couple of others suggested it was a French-language TV channel



Belonging

- Awareness was a bit stronger among this segment, particularly in Quebec City, where there was more knowledge about how Canadian films get funded
- Some suggested Telefilm was a government agency that funded film production in Canada, or provided grants to filmmakers
- A few believed it was an intermediary for U.S. and foreign productions shooting films and TV shows in Canada
- Only a few believed Telefilm helped market and distribute Canadian films

MANY FROM BOTH SEGMENTS BELIEVED TELEFILM'S MISSION STATEMENT WAS VALID AND IMPORTANT



Curious

- Many from the Curious segment felt this mission was valid and necessary
- They agreed with promoting Canadian culture through its films, and hoped this would spinoff to create a stronger Canadian film industry, more jobs, and even increased tourism
- Quite a few others were surprised by this news and that they had not previously heard about it
- Several others were concerned about tax dollars being used to finance films that might not be high in quality, or might perform poorly at the box office



Belonging

- Many from these groups described its mission as important and noble
- They believed there was a need to make Canadian films more visible and to promote Canadian productions
- Some wanted Telefilm to have an ample budget to compete with US productions
- Several others, however, were surprised this was happening and that they had not heard anything about it; quite a few felt Telefilm and its mission needed some promotion, too

IN THEIR OWN WORDS



Curious

"I agree with the principle of their mission. Help should be offered to those who are not known to help get them started."

"All the promotion is not going to make people want to see a movie. There have been movies that lasted a week or two in the theatres, so putting money into Canadian movies that are not good is a waste of our money."

"I think funds should go to films that are successful. If a movie makes more money, it also pays more taxes."



Belonging

"The government has probably cut such initiatives. That kind of thing has its reason for being and we are proof. We do not know Canadian cinema."

"In an ideal world, Canadian film could stand on its own merits and not need this kind of support, but with how the world works, with Hollywood and marketing, this is necessary for Canadian film."

"Who decides what we get to see, and who gets that funding? Some productions don't get that funding. I don't know about the hoops they have to jump through."

HONORING TALENT WAS BELIEVED TO BE SAFE AND WAS GENERALLY WELL LIKED BY THE CURIOUS SEGMENT, BUT WAS NOT DEEMED TO BE VERY NEWSWORTHY



Curious

- Several liked that this message sounded more inclusive – it seemed less political and did not single out a specific culture
- It was a simple yet positive message about film promotion and marketing, and focused on Canadian talent
- Some felt this type of support was particularly important because great talent often left the country to seek greener pastures in the U.S.
- A few felt it was unclear whether Telefilm was strictly promoting and marketing Canadian films, or if it planned on producing them, too
- A few from BC and Quebec felt this message was too Toronto-centric, with no mention of Vancouver or Montreal



Belonging

- Several lauded Telefilm's sponsorship and promotion efforts and felt this is what this agency should be doing
- They appreciated the focus around recognizing talent and generating visibility, particularly at festivals where international audiences gather
- Some, however, felt this was an unnecessary pat on the back because this wasn't news; they believed this was already their mandate and expected them to be doing what was outlined
- A few others felt this announcement was somewhat vague on its details, and not very exciting

A large, bright yellow graphic in the shape of a stylized letter 'T' is positioned on the right side of the slide. It has rounded corners and a thick, solid color.

Thank you

**For any questions, please
contact sr@telefilm.ca**