



INSPIRED BY TALENT. VIEWED EVERYWHERE.

2015-2018 STRATEGIC PLAN

TELEFILM
C A N A D A

A TALENTED FUTURE



Telefilm Canada is a team of some 200 professionals serving the industry from four offices located across Canada. Dedicated to the cultural, commercial and industrial success of Canada's audiovisual industry, Telefilm, through its various funding and promotion programs, supports dynamic companies and creative talent here at home and around the world.

IT'S A TIME FOR TALENT.

Telefilm Canada is and has always been a vital funder and promoter of high quality Canadian cinema and television –

a creative sector driven by talent. Talent in all aspects of the creation, development, financing, production, distribution and dissemination of Canadian audiovisual material.

Telefilm remains resolute in its effectiveness as a public agency, and resourceful in its approach to fulfilling its mandate and vision. Building on almost 50 years of investment, Telefilm continues to work with its partners – new and longstanding – to shape a landscape conducive to creativity in cinematic storytelling.

Canada today has an audiovisual sector with global impact, driven by seasoned leaders who share our conviction that the industry is both mature and increasingly complex, requiring both big ideas, and big shoulders.

It's an industry that understands that creative approaches to financing and marketing are needed to survive and prosper in an uncertain and rapidly evolving environment.

That's no small challenge in an always-on world. A world where audiences expect to be able to access all content, on any device – from anywhere, at any time. Where there are more and more “superviewers” who binge, share, comment and re-mix that content. Where the upcoming release of a film on the big screen has become an interactive opportunity for fans to jump-start the conversation about it, and to collaborate in or condemn its promotion. Where a profoundly interconnected generation – the first generation of individuals living truly transmedia lives – is able to jump from device to device, consuming different narratives simultaneously or in a series of hurried pauses.

FIVE DECADES



We are living in a time that novelist William Gibson describes as “a now that’s so short that in a sense it’s as though it’s eternal. We’re just always in the moment.” But the moment we’re in is only fleeting.

Telefilm’s partners —storytellers writers, directors, actors, financiers, artisans and technical experts and innovators— embrace this reality. They want the sources of funding for their work to be more diverse. They want promotional strategies keyed to the realities of the marketplace. And they want Telefilm to engage with them in an evolved partnership that sees the industry itself bear greater accountability and share more fully not only in the risks but in the rewards of success.

Canada has a history of success taking on the future. Expo 67 showed the world what the future might look like: a world connected and interconnected, to be marvelled at by all on screens big and small. Acclaimed as the greatest-ever world’s fair, Expo offered a taste of the future of cinema, in exhibitions that mixed and effectively re-invented the viewing experience in ways *that have come to be seen “as a harbinger of the digital age.”*

*In Canada,
led by Canadians.
Audiences cheered.
Innovation worked.*

It was in this exciting context in 1967 —in which a confident nation, asserted itself while re-discovering itself in literature, painting, music and theatre— that Telefilm Canada was created. To galvanize burgeoning cinematic voices, to help build the storytelling infrastructure the country needed and so desired. Once the astonishing fair was over, the innovation could and had to continue.

The profound social and cultural changes that have occurred over the almost 50 years since then have seen well-established business models, and modes of production and distribution rocked to their foundations —or disappear almost overnight— as newly “disruptive” ideas emerge.

Thriving in today’s environment requires creativity, courage and discipline. And it requires a partnership of complementary and collaborative talents, working across disciplines —not just in the creation of great films, but in their financing, marketing, distribution and social interaction—

*pulling together
for success,
and bringing
new audiences
and creators
together in this
new environment.*

This is as exciting a time as the one that sparked the inspiring ideas of Expo.

CULTURE + INDUSTRY + COMMERCE IN SYNCH

At its core, Telefilm is and always has been an engaged and collaborative funder, an agency that exists to foster and catalyze the promotion of Canadian cinematic culture.

Canadian films and television programs have become part of the national cultural fabric.

The future isn't somewhere out there, waiting around. Any organization looking ahead as it plans has to be 'simultaneous' —incorporating lessons learned with a view to preparing for what lies ahead. Living in the moment even as it looks ahead to the next, and to the one after that. For Telefilm, this means understanding that creators and audiences are already living in this future.

Much of Canadian cinematic expression today is increasingly cross-disciplinary, digital, borderless and participatory. And with this rich mix comes the need for a partner like Telefilm to see and to contextualize the rapid changes affecting the industry. This makes for more adept and enthusiastic management of change, perceptive decision-making, and productive and sustainable results.

When the world is your screen, the stakes are high, but the potential returns and cultural impact are enormous.

SEEING THE SHIFT —CHALLENGES FOR THE INDUSTRY AND TELEFILM

- Independent films* occupy less screen-time and fewer screens in mainstream cinemas.
- Most viewers watch feature films at home, not in cinemas.
- Longstanding industry parameters regarding platforms, territories and launch windows for product are all changing rapidly.
- Players that did not exist until recently are now game-changers whose actions have industry-wide impact.
- The market's appetite for content is strong — but the marketplace is increasingly crowded.
- Merchandising of titles on online platforms requires new and very specific expertise, for both retailers and marketers.
- Films and television programs have to be more readily 'discoverable' by targeted audiences in an online marketplace.
- Curating titles —selecting and organizing a set of titles along a theme or for a specific audience's interests — is a growing phenomenon in an increasingly segmented market.
- Traditional, stable business models are being challenged; new ones are tested every day, but the future is still unclear.
- Canadian taxpayers demand that public monies be spent effectively and in support of identifiable and measurable objectives.

* Independent feature films are defined as being produced outside of the major multinational film studio system.

A NEW COMPETING ENVIRONMENT*

■ New Platforms in Canada ■ New Platforms – International ■ New Content Studios

PRE-2012	2012	2013	2014	2015
Youtube, iTunes, Netflix, Tou.tv, BBC iPlayer		Illico Club à volonté, Canal+ Canada, CTV GO, Youtube Paid Content, Vimeo on Demand	Shomi, Crave TV	
Amazon Instant Video, Hulu, Netflix, Yahoo Screen, Youtube, Crackle, Mubi, Dailymotion, iTunes, BBC iPlayer, SnagFilms, ArteVOD, Pluzz, Quickflix, Dailymotion, LoveFilm, HBO Go, CanalPlay, Filmo TV		Youtube Paid Content, Vimeo on Demand	CBS All Access	HBO standalone service, Dish Network's Sling TV, Stan, Presto TV
	Netflix Original Programming, YouTube Original Channel Initiative		BuzzFeed Motion Pictures	Amazon Studios

* Timeline is not exhaustive

As more Canadian films and talented Canadians assert their place on the world stage, the competitive pressures will increase, and so must their promotional energies and ideas in order to measurably increase viewership.

We know audiences love what they see when they are given the chance to see great Canadian works. Increasingly, this includes global audiences who know a great story when they see one —and are perfectly fine with that story being Canadian.

CRAFT, EMOTION, STORY – CANADIAN CREATORS DELIVER.

In line with its mandate to fund and promote the industry, Telefilm's strategic intent going forward is to shift more resources to the promotion of Canadian works that audiences in Canada and around the world want to see.

That's why our overarching, driving goal in this plan remains, as it has been since 2011, to continue to stimulate demand for and access to Canadian productions —in Canada and everywhere, from big screens to those still being invented, and every platform in-between.

Where a Canadian story can be shown, let's take it there.

Working closely alongside the industry to make more Canadians aware of Canada's international reputation as one of the world's leading creative nations, skilled at producing sophisticated audiovisual works that matter. Together, we celebrate the diverse, dynamic and extraordinary Canadian talent pool, living and working here and abroad.

Canadian films are making their mark. Let's build on that.

STRATEGY. DIRECTION. FOCUS.

SIX PRIORITIES FOR TELEFILM

INDUSTRY
RECOGNITION

**PROMOTING
THE VALUE
OF CANADIAN
CONTENT**

MARKETING
PRACTICES

**ENCOURAGING
INNOVATION
TO REACH
AUDIENCES**

MARKET
INTELLIGENCE

**DECIDING
WITH
MEANINGFUL
METRICS**

INDUSTRY
FUNDING

**DIVERSIFYING
SOURCES**

ECOSYSTEM
OF COMPANIES

**DELIVERING
TOGETHER**

ORGANIZATIONAL
EXCELLENCE

**PERFORMING
IN A
CHANGING
ENVIRONMENT**

**SIX PRIORITIES
FOR TELEFILM**

**INDUSTRY
RECOGNITION**

PROMOTING THE VALUE OF CANADIAN CONTENT

- *Conduct effective promotion of the industry and its success directly to consumers.*

Every cultural product, or slate of offerings, has a brand, intended or not. Audiences perceive creative work to be great, derivative, ground-breaking, predictable, surprising or reliably excellent. The deep impact of a brand comes first from the quality of the product itself, from the talent that built it, but that brand meaning has to be effectively, consistently and creatively shaped and communicated to audiences, and especially to those most receptive to Canadian talent: the fans —those engaged enthusiastic supporters on whom we can count to relay the good word.

As much as the goal of increasing viewership is tied to the effectiveness of each production's marketing campaign, it can be multiplied if a film is seen as part of an extraordinary body of work.

As a national and international promoter of Canadian talent and creativity, Telefilm will use its position and leverage to increase interest in Canadian productions, talent and their successes.

By leveraging strategic partnerships and industry-wide resolve, Telefilm aims to markedly increase awareness levels of our great writers, directors, producers, craftspeople and screen performers —wherever they live and work.

The branding opportunity is real. It needs to be explored, better understood and leveraged.

**SIX PRIORITIES
FOR TELEFILM**

**MARKETING
PRACTICES**

ENCOURAGING INNOVATION TO REACH AUDIENCES

- *Players to reduce gap with viewers' expectations.*
- *Increase viewership of Canadian productions.*

The competition for any given person's decision to watch and pay attention to a particular Canadian production, at any given moment, at a theatre or on a tablet, is up against the clock. We live in an attention economy. Films stay in cinemas for shorter runs or bypass cinemas altogether. Online, people spend only minutes, on average, before jumping to the next website or app. And apps, like games, draw people into an environment that can be deeply immersive, but closed.

Screens and choices proliferate, and with that, a new Canadian film suddenly finds itself competing not only against a world of new productions, but against the classics of world cinema, decades-worth of television series that are easily 'binge-viewed', as well as the imperatives of viewers' own work and social lives, which 'live' on the same screens.

Marketing should start with the creative process and continue across all platforms and beyond the initial launch window. Measuring and understanding how audiences make their content decisions, seeing them not simply as 'demographics' with fixed media appetites and diets, can present us with a real-time map. It can also help to identify new opportunities to position and promote films and television productions. But seeing and understanding this complex environment is one thing. Navigating it is another.

As new platforms, channels, libraries of content and ubiquitous online access emerge,

Canadian filmmaking teams must apply their creative skills off the screen too in new ways, experimenting for example with multi-platform roll-outs that take a film everywhere its fans want to see it.

Audiences too are partners — if we give them something to talk about, they will talk, share and become advocates of the great work being produced by Canadians.

With a bespoke approach to every film's release, viewership goals must be integrated into all marketing decisions and initiatives. Developing projects that have greater built-in market interest — significant budgets and all of the talent and genre elements in place that make for an attractive package — draws the interest of foreign distributors, broadcasters and investors, and have proven to increase the amount of private-sector and foreign investment in feature films funded by Telefilm. From that solid base Telefilm will continue to spur the industry to act assertively and creatively on these positive market realities.

**SIX PRIORITIES
FOR TELEFILM**

**MARKET
INTELLIGENCE**

DECIDING WITH MEANINGFUL METRICS

- Conduct and communicate value-relevant research.
- Enhance comprehensive success measurement.

**IDEAS MATTER.
SO DO NUMBERS.**

Audiovisual production doesn't exist in a vacuum. It morphs and mixes with every new day and with every new app, in our theatres, in our homes, in our hands and in the streets. The making and exhibition of stories on any platform have industrial and commercial parameters, as well as cultural ones. In a data-rich, and relentlessly data-flooded world, making sense of it all is vital to the making of things. The measure of how Canadian productions succeed will be captured and told using a synthesis of results that reflect the real-world impact of the work of our screen talent —from the dollars to the euros, from the applause to the kudos, from the print critics to the bloggers, from the box office line-ups to the online views. They all represent our audiences.

No matter how sophisticated, no set of metrics can take the place of creative decisions made by writers, directors and producers.

No data set will generate original ways of seeing the world, the human expression of ideas, emotions and life. But an expanded understanding of the universe in which our stories are developed, marketed, distributed and consumed can only empower Canadian film and television talent to make more informed decisions, develop more accurate projections of success, and generate stronger connections with audiences.

Telefilm knows that understanding who is watching Canadian productions when, where and how —and against what other competition, from any realm of human engagement— is critical to crafting a path to greater success. So that the industry is better able to design and attain a place among the expanding universe of media offerings.

Telefilm will continue its precisely-targeted market intelligence activities, scanning, and distilling the reams of relevant data, finding the patterns —sometimes surprising, always changing— and fulfilling the industry's need for a more global and strategic approach to its work.

Through effective thought leadership, metrics and meaning are brought together to create new opportunities, new methods, new products, new collaborations and new and newly-engaged audiences.

Telefilm's industry partners agree.

Moving ahead means firmly establishing viewership —with every screen and platform recognized and accounted for— as the primary measure of success.

We'll continue to develop, in concert with our stakeholders, the tools needed to capture this vital data at the granular level, but also to give it meaning and value —to contextualize it— at the macro level. Together, making better sense of the complex media world, and solidifying Canada's place in it.

**SIX PRIORITIES
FOR TELEFILM**

**INDUSTRY
FUNDING**

DIVERSIFYING SOURCES

- *Attract new funding partners;*
- *Examine new long-term funding mechanisms.*

*Ambition
comes at a price.
Telefilm will continue
to seek funds
with imagination
to achieve
sustainability.*

But the world is now too big, the challenges too broad, the goals too ambitious to rely only on traditional sources and strategies. New partners and new initiatives, in addition to the already eclectic and creative mix of investors and supporters behind such initiatives as The Talent Fund, need to be attracted.

From content creation, to mutually beneficial promotional events and campaigns that can lift a film to a new level of accessibility and audience reach, to the ongoing promotion of Canadian talent across platforms, and across the world, the costs are real and substantial. We are optimistic and engaged in confronting this challenge. We are reaching out to new partners, in concert with our private sector colleagues, to generate not only new sources of funding but new funding strategies as well. Telefilm will encourage experimentation with alternative financing strategies to ensure Canadian filmmaking reaches new heights.

**SIX PRIORITIES
FOR TELEFILM**

**ECOSYSTEM
OF COMPANIES**

DELIVERING TOGETHER

- *Develop and support an ecosystem of companies, including emerging ones, effective at delivering against expectations.*

The past five decades have seen feature film and television production and distribution grow and flourish. In the early years of Telefilm's mandate, the most immediate challenges involved expanding the Canadian infrastructure and developing the Canadian talent pool, to enable producers to advance the creative and financing skills they needed. Since then, the volume of work has nourished several generations of filmmaking excellence, building storytelling skills, entrepreneurship, and national and international reputations for excellence.

The result is the emergence of a complex, competitive and mature ecosystem of production and distribution entities — which includes the guilds, unions and associations. If the industry is to continue to thrive, these entities must look carefully to their growth and sustainability, which in turn requires a focus on diversity, balance and calibration.

A thriving industry ecosystem will encompass a portfolio of companies that can deliver a volume of productions with expected successes — sometimes commercial, sometimes cultural, sometimes both, but in all cases increasingly subject to more meaningful measurement. It will pursue filmmaking excellence in deal-making as well, and in varied approaches to marketing.

And it will ensure that the discovery and encouragement of new talent remains a priority since this is the best means of ensuring success.

**SIX PRIORITIES
FOR TELEFILM**

**ORGANIZATIONAL
EXCELLENCE**

PERFORMING IN A CHANGING ENVIRONMENT

- *Continue to strive for optimum levels of effectiveness and efficiency.*

This strategic plan, the most ambitious in Telefilm's half-century history of successfully funding and promoting the Canadian film and television industry, will be fulfilled in part with an ongoing, rigorous assessment of the organization's own practices. Just as we ask our clients and collaborators to innovate, Telefilm will do so as well to achieve excellence.

During the period of its previous Strategic Plan, Telefilm succeeded in increasing industry satisfaction with its programs and their implementation. We will seek to remain one of Canada's most effective and efficient publicly-managed organizations.

Ensuring that Telefilm sustains its productivity and its client-focused approach demands that we provide our employees with a progressive, engaged and enthusiastic corporate environment, and that we encourage and support innovation and change from within. We will continue to maintain the low net cost of our operations, and will continue to seek the views of our industry colleagues on questions related to our effectiveness, productivity, professionalism and accessibility.

Filmmaking is now a discipline affected by everything from pixel-level technological breakthroughs to unexpected international corporate endeavours to generational changes that defy what a 'generation' used to mean —all happening at a speed that no corporate plan can neatly map out years in advance. New content and distribution players —major players, operating at a scale that exceeds the traditional 'major studio' model, and encompasses all things digital— are changing the glossary and so the meaning of our industry, and the outcomes.

And so a key test for us will be our ability to anticipate and smartly move with, and even ahead of, the shifting social, cultural and economic tectonic plates.

STORYTELLING, COLLABORATION, CREATIVITY.

The talented Canadians who work together to tell cinematic stories in new ways apply craft, drive and creativity to make works that matter. That matter to audiences. To Canada.

All of us who work in Canadian cinema know how powerful storytelling is. And how rewarding it can be to see an audience immersed in a film, responding to the creative decisions made by so many collaborators to make a work that is funny, touching, frightening, provocative, astonishing —or all of those things.

Sustainability in the creative realm requires an intense commitment to the continuous development and promotion of talent, on and off screens. It also requires a robust financing network.

The cultural engine that is Canadian filmmaking can also generate the intellectual capital needed to spur invention in financing, promotion, marketing and distribution.

Telefilm is impelled and inspired by its cultural mandate to seek out fresh ideas to fulfill it.

*Telefilm will
continue to seek
new partners,
across sectors
and borders,
as Canadian film
and television
generates new
possibilities for
cultural expression
on-screen.*

*Talent finds a way.
And Telefilm
backs talent.*

TELEFILM CANADA'S 2015-2018 STRATEGIC PLAN OVERVIEW

OUR MANDATE

To foster and promote the development of the audiovisual industry in Canada.

OUR VISION

Canadian productions, on all consumption platforms, in Canada and abroad.

OUR OVERARCHING GOAL

Stimulate demand for Canadian productions.

OUR STRATEGIC PRIORITIES FOR 2015-2018

INDUSTRY RECOGNITION — PROMOTING THE VALUE OF CANADIAN CONTENT Conduct effective promotion of the industry and its success directly to consumers.	MARKET INTELLIGENCE — DECIDING WITH MEANINGFUL METRICS - Conduct and communicate value-relevant research. - Enhance comprehensive success measurement.	INDUSTRY FUNDING — DIVERSIFYING SOURCES - Attract new funding partners; - Examine new long-term funding mechanisms.	ORGANIZATIONAL EXCELLENCE — PERFORMING IN A CHANGING ENVIRONMENT Continue to strive for optimum levels of effectiveness and efficiency.
MARKETING PRACTICES — ENCOURAGING INNOVATION TO REACH AUDIENCES - Players to reduce gap with viewers' expectations. - Increase viewership of Canadian productions.		ECOSYSTEM OF COMPANIES — DELIVERING TOGETHER Develop and support an ecosystem of companies, including emerging ones, effective at delivering against expectations.	
PROMOTER	LEADER	FUNDER	ADMINISTRATOR

OUR FOUR PILLARS

GUIDING PRINCIPLES

- Telefilm will:
- Set clear goals and measures
 - Move forward one step at a time, in collaboration with industry partners
 - Allow industry players to do what they do best themselves
 - Act as a catalyst for industry-led change
 - Foster increased accountability by industry players

***INSPIRED BY TALENT.
VIEWED EVERYWHERE.***

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Canada