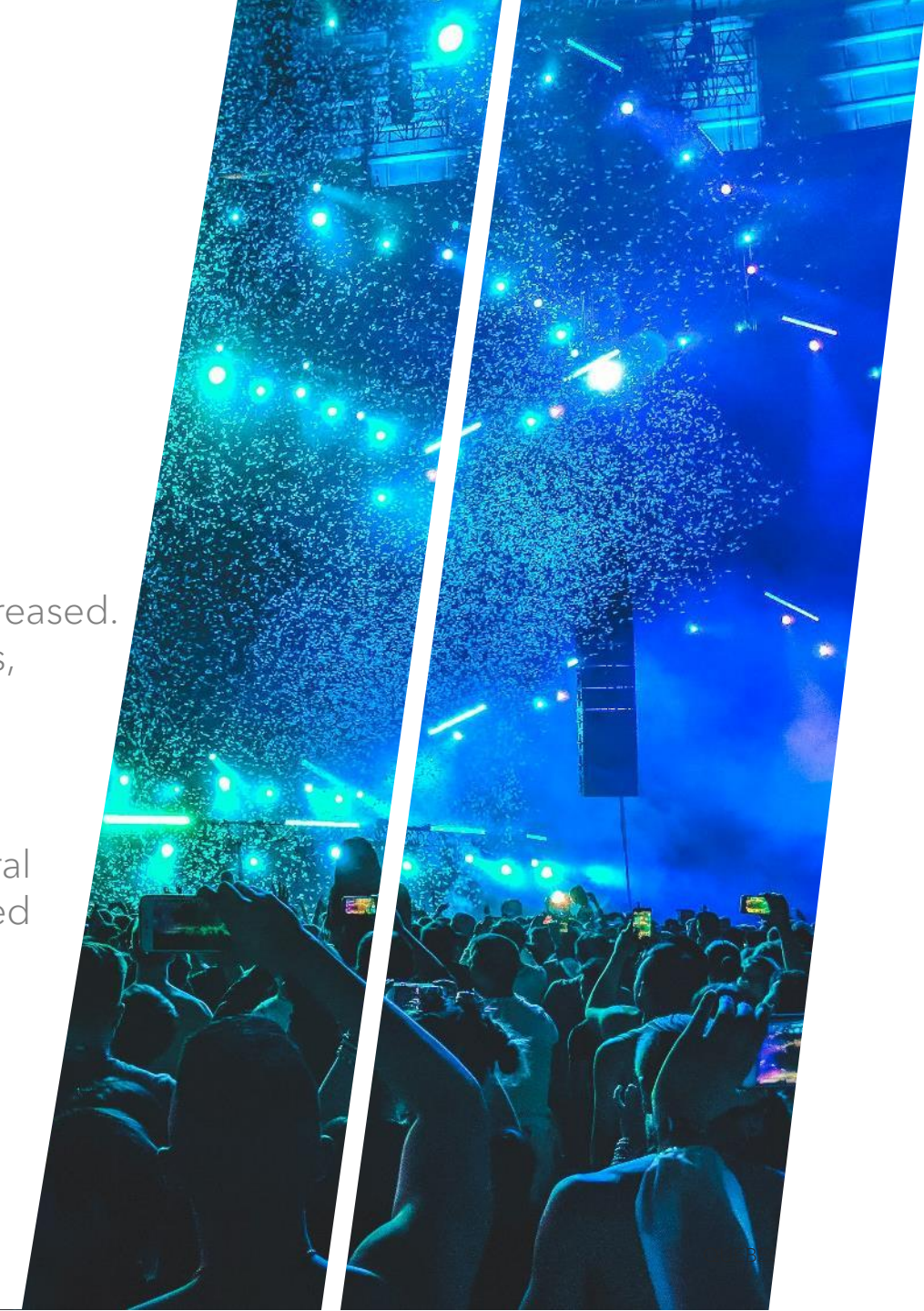


ENTERTAINMENT INDUSTRY TRENDS

/ JULY 2021

Highlights

1. Performing arts and entertainments in Quebec: an economic driver and a cultural heritage that need to be protected.
2. With the pandemic, online culture and entertainment consumption increased. As things start to return to normal, a new type of consumption emerges, combining physical and digital experiences.
3. Performing arts enthusiasts are looking forward to resuming their cultural outings. But for the sector to flourish, entertainment businesses will need to attract a wider audience.



performing arts in Quebec

/ an economic driver that needs to be protected

"The cultural field does a lot more than just entertain; it ensures the continuity of what sets us apart as a nation." Mr. Stéphane Bergeron, deputy of Montarville

ECONOMIC IMPACT OF ALL BROADCASTERS COMBINED

\$282M
total revenue

20K
representations

7.7M
spectators

\$181.8M

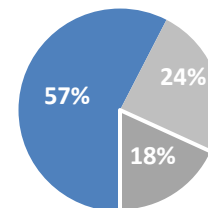
from the federal government to help deal with the impacts of COVID-19

- Support the industry relaunch
- Create or adapt a piece for a virtual public
- Stimulate research, creation, and production

PERCENTAGE OF HOUSEHOLD BUDGETS

\$282
is how much Quebecers spend on cultural activities/outings every year

Breakdown by entertainment type



- Sporting events and shows
- Cinema
- Museums, zoos, and other sites

7%
of Quebecers' leisure budget

Spectators aplenty

/ consumer profile

PAY-TO-ATTEND PROFESSIONAL SHOWS

2018

4.5M

Spectators/year

Most sought-after sectors:

- Comedy
- ENG songs/concerts
- FR songs/concerts
- Theatre

13%

of the public attend more than 10 shows per year.

That represents **44%** of entry tickets to pay-to-attend professional shows.

WHAT DO THE FANS LOOK LIKE?

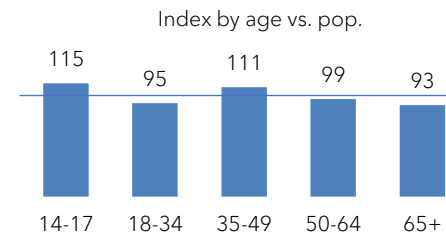
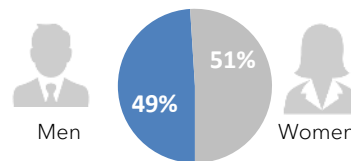
1. Spectators are not purists and committed to only one art form. There exists great permeability between disciplines.
2. 25-34 year olds are the biggest consumers, especially in term of ENG songs and dance.
3. The level of attendance rises in direct proportion to income and level of education.



ATTRACT BIGGER AUDIENCES

35% of Quebecers do not attend shows or concerts on an annual basis.

Entertainment businesses want to attract and seduce this hard-to-reach target.



Children <18 years

Index 111



HH INCOME 100K\$+

Index 113



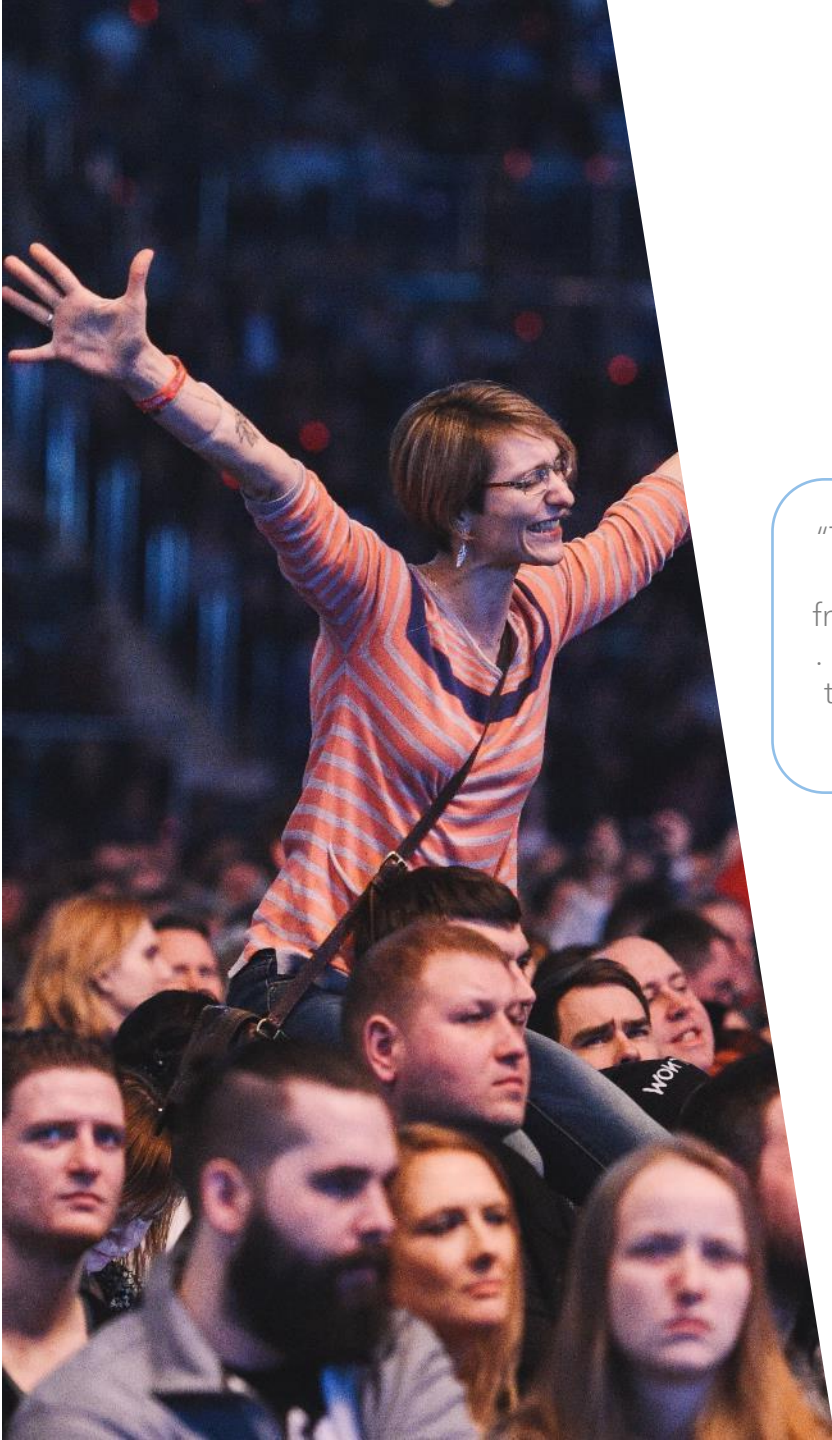
Businesspeople

Index 108



University graduates

Index 107



post-pandemic state of affairs

/ impatient consumers

"The joy of going out, sharing moments with family and friends, the contact with artists . . . There are so many reasons that justify our attachment to performing arts."

41% of spectators experienced a **minor impact** on their capacity to invest in cultural activities.

80% of spectators expect to return to concerts as much as, or more than they did before.

40% would be ready to attend a concert tomorrow.

3 out of 10 people were able to take advantage of free or inexpensive cultural activities thanks to the pandemic.

PROFILE OF QUEBECERS

Looking forward to resuming their cultural outings

57% plan on going to the cinema, events, festivals, and concerts once again.



women
Index 107



35-49 years old
Index 111



Children <18 years
Index 108



HH INCOME
100K\$+
Index 115



Businesspeople
Index 114



University graduates
Index 110



City dwellers and those over 65 are a bit more leery about attending public activities.

digital's place

/ in the cultural world

The pandemic caused an increase in streaming live entertainment events. Will consumers want a hybrid experience going forward?

INTERESTED CONSUMERS

72%

of consumers who attended a live event virtually did so because of COVID-19.

42%

say they wouldn't mind continuing to do so in the coming years.

ORGANIZATIONS READY TO RISE TO THE CHALLENGE

82%

of artistic organizations are already exploring digital opportunities.

54%

of organizations believe that digitization will help them develop their artistic offer.

A SIGNIFICANT CHALLENGE

37%

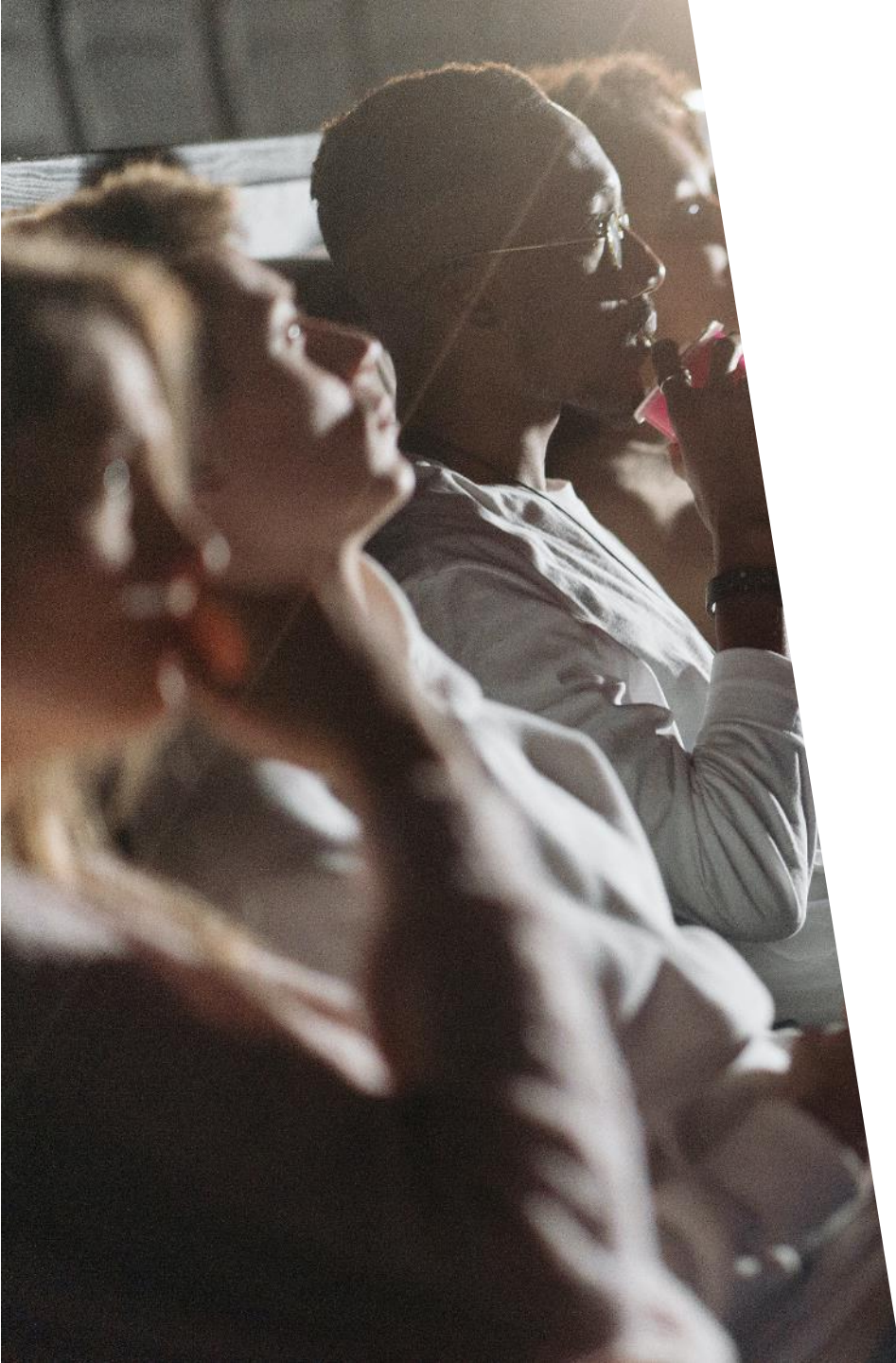
claim to lack the necessary equipment and technology.

A major challenge for brands: being able to generate as much buzz on social media for a virtual event as for a live, in-person event.





ANNEXES



Quebec cinema

/ current reality

The pandemic had a **devastating** impact on cinema attendance. However, Quebecers' **interest** is still present and **local cinema** is on the rise.

ATTENDANCE FOR QUEBEC CINEMA

2020

13.1%

+5.2% vs. 2019

#2 after American movies

"The best results in almost a decade."
According to 2020 box-office data published by Cinéac

2x

more Quebec movies at the top of the charts vs. 2019

- + MAFIA INC
- + Merci pour tout
- + Mon cirque à moi
- + Suspect numéro 1

The public's love of cinema was not affected by COVID-19

Special programming (ex.: Minuit au Parc) shows that the target audience is still very present.



museums still busy, despite the pandemic





Museum attendance was hit hard by the pandemic. The visitor experience, however, was vastly improved and the public happily promoted the new changes.

71%
of visitors would recommend the museum visit to their entourage.

In a context where activities and travel are limited, local tourism is benefitting from museum visits:

50%
of visitors travelled to the region in large part for museums.

VISITOR PROFILE
in 2020

-  **66%**
Women
-  **21%**
35-44 years old
-  **34%**
Couples
-  **28%**
Families