MIPCOM - 2006
Outcomes Report

Conducted by:

POLLARA™
STRATEGIC PUBLIC OPINION & MARKET RESEARCH

December 2006

Methodology

- A total of 86 e-mailed invitations were sent to Canadian companies that attended MIPCOM 2006.
- 70 of the 86 companies clicked on the link in the e-mail invitations to go to the survey site.
- Of these 70, 66 completed all of the survey - a 77% response rate.
- The survey was open from October 27 until December 8, 2006.
- During the course of the survey, POLLARA and members of the IIAC followed up with non-responding companies by e-mail and by telephone to encourage them to participate.

Methodology

E-mail invitations sent to 86 companies

↓

70 clicked on link in e-mail to
visit the survey site

↓

66 companies reached the
end of the survey

Sample and Respondents by Province

- Broken down by province, the sample consisted of the following companies.

Province	Companies in sample	Companies starting survey	Companies completing survey
Ontario	45	36	34
Quebec	19	14	13
British Columbia	11	10	10
Nova Scotia	3	3	3
Manitoba	3	2	1
Saskatchewan	2	2	2
Alberta	1	1	1
PEI	1	1	1
Yukon	1	1	1
Total	**86**	**70**	**66**

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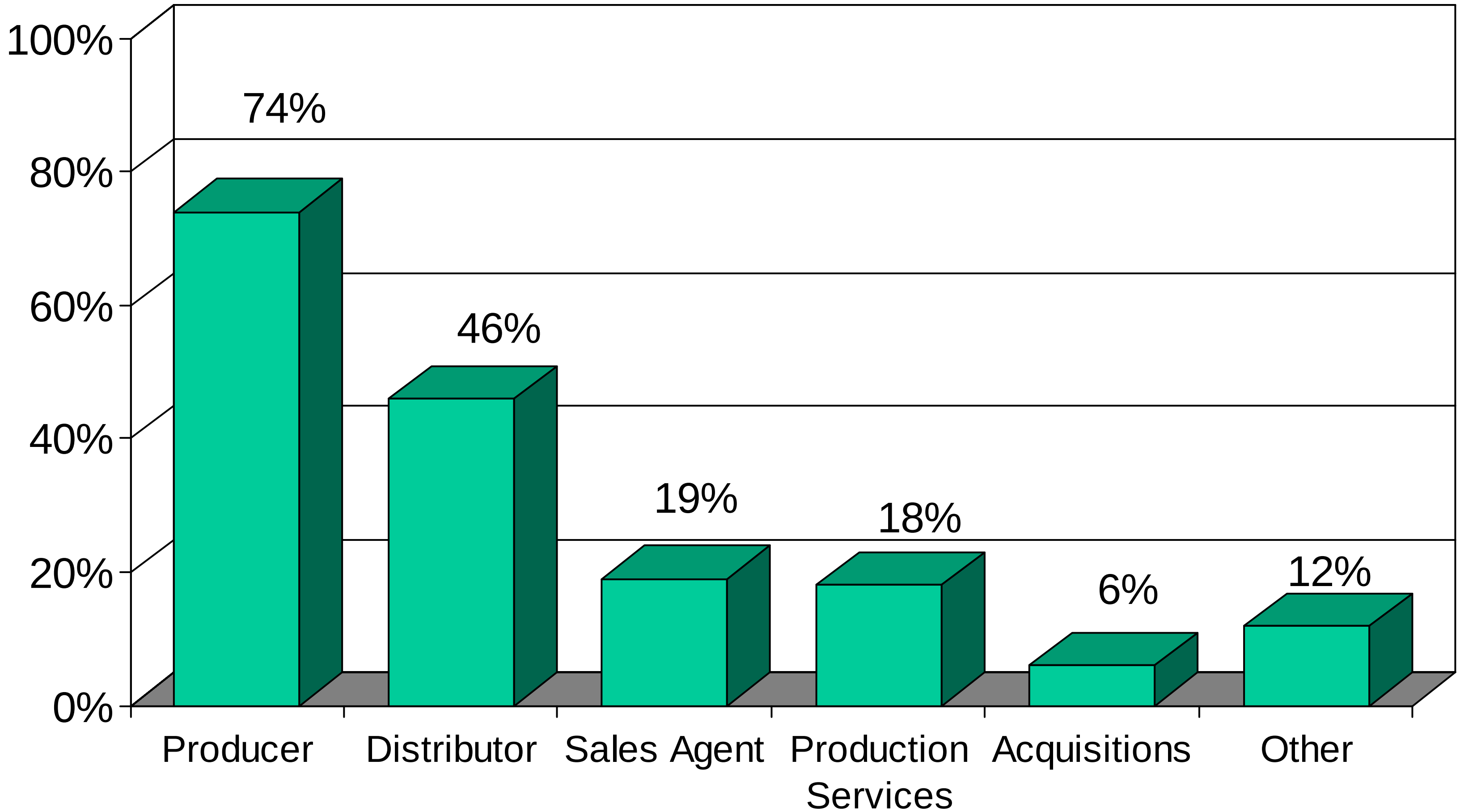
Respondent Profile

Primary Business Focus of Company



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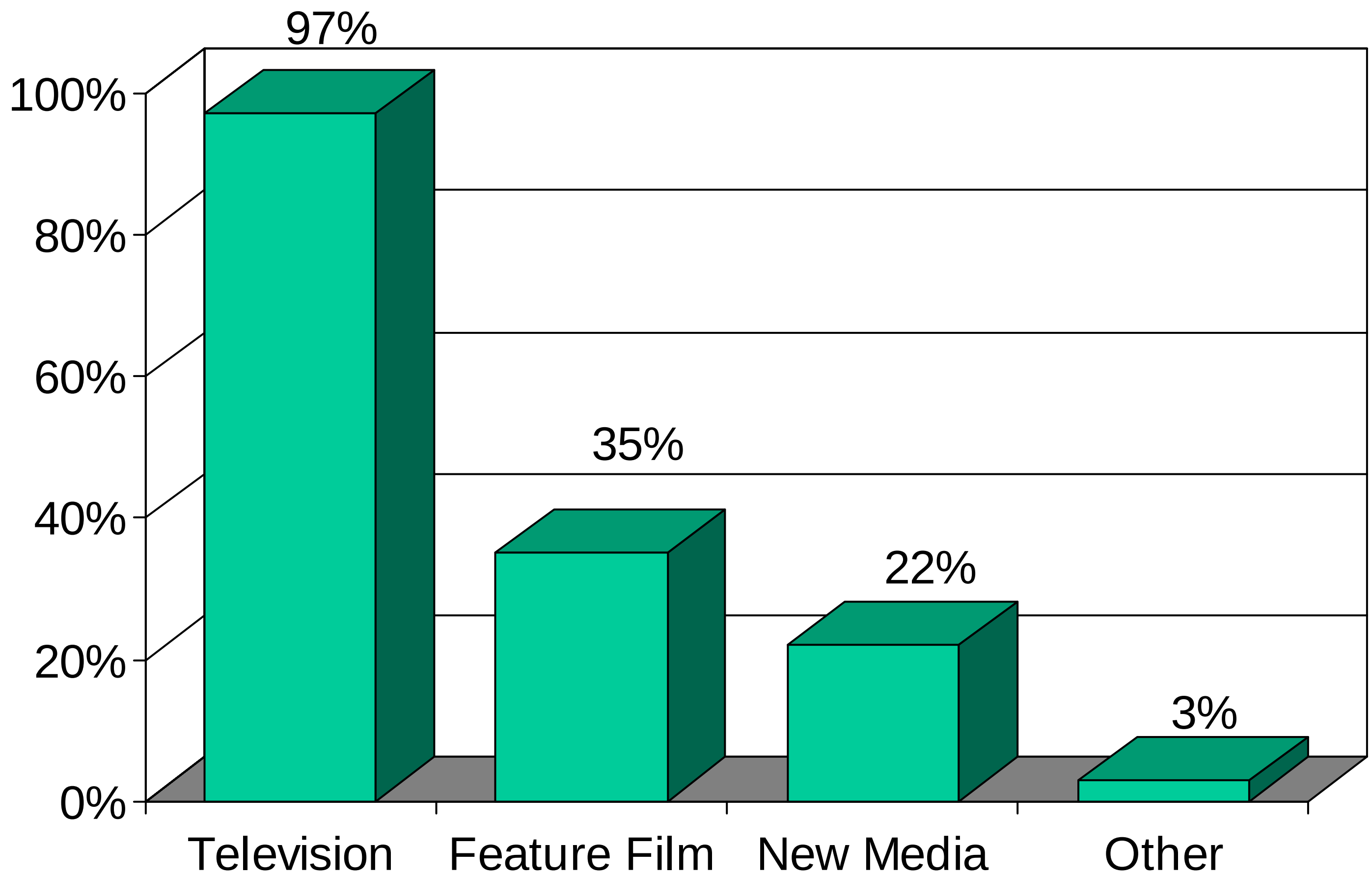
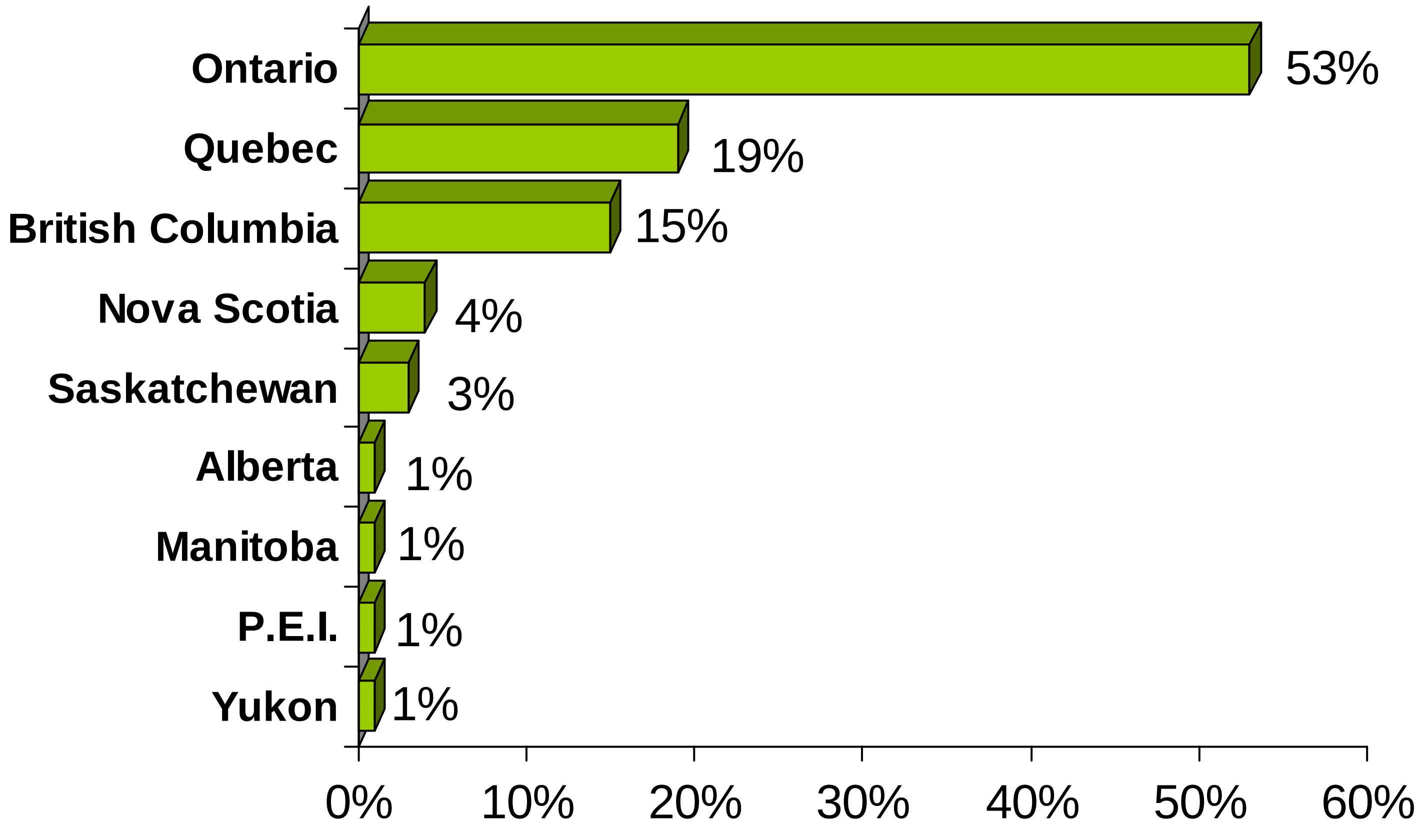
Q1. What is the primary business focus of your company? *Select all that apply.*
N=68

Main Format(s) of Interest



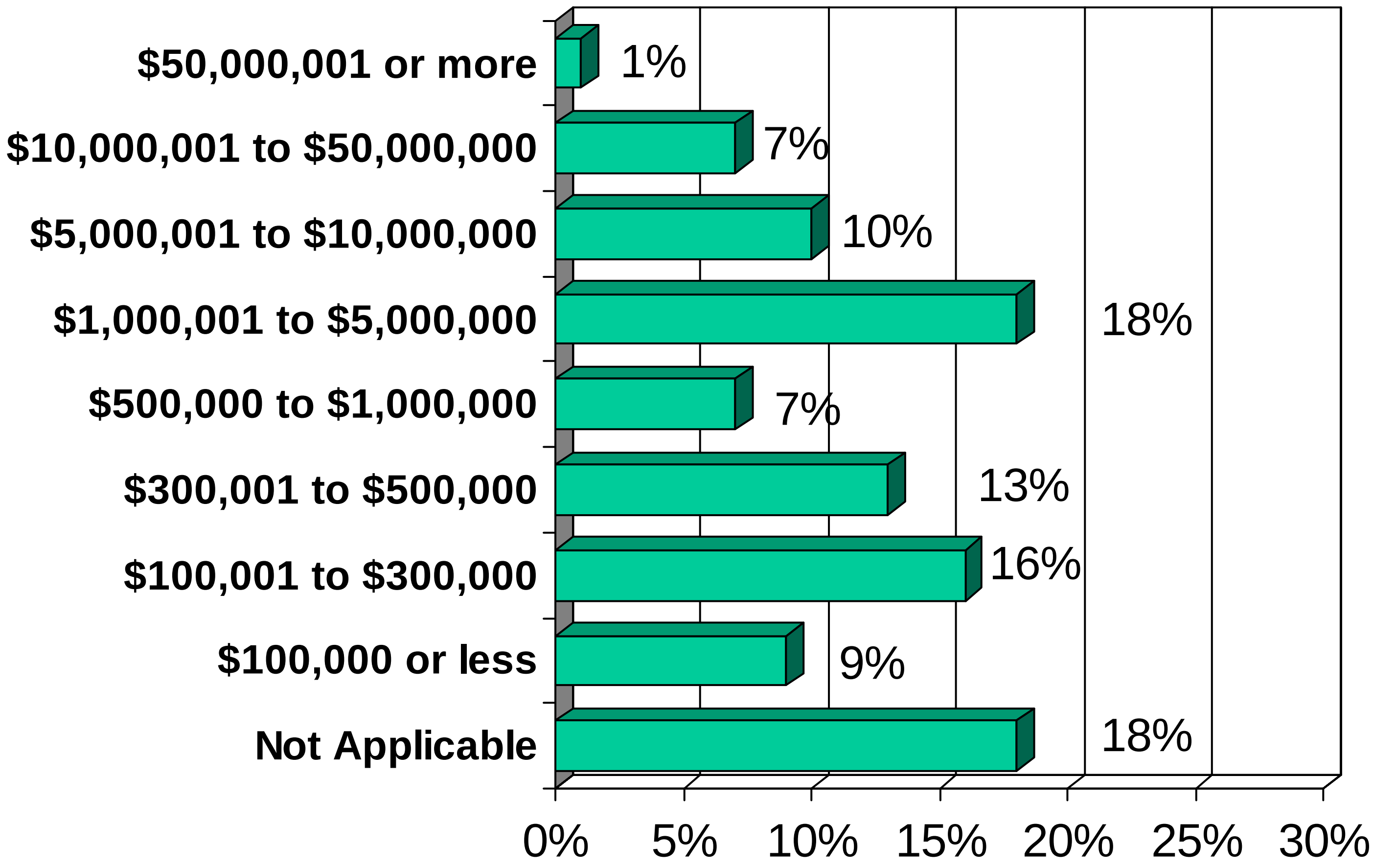
Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=68

Location of Head Office



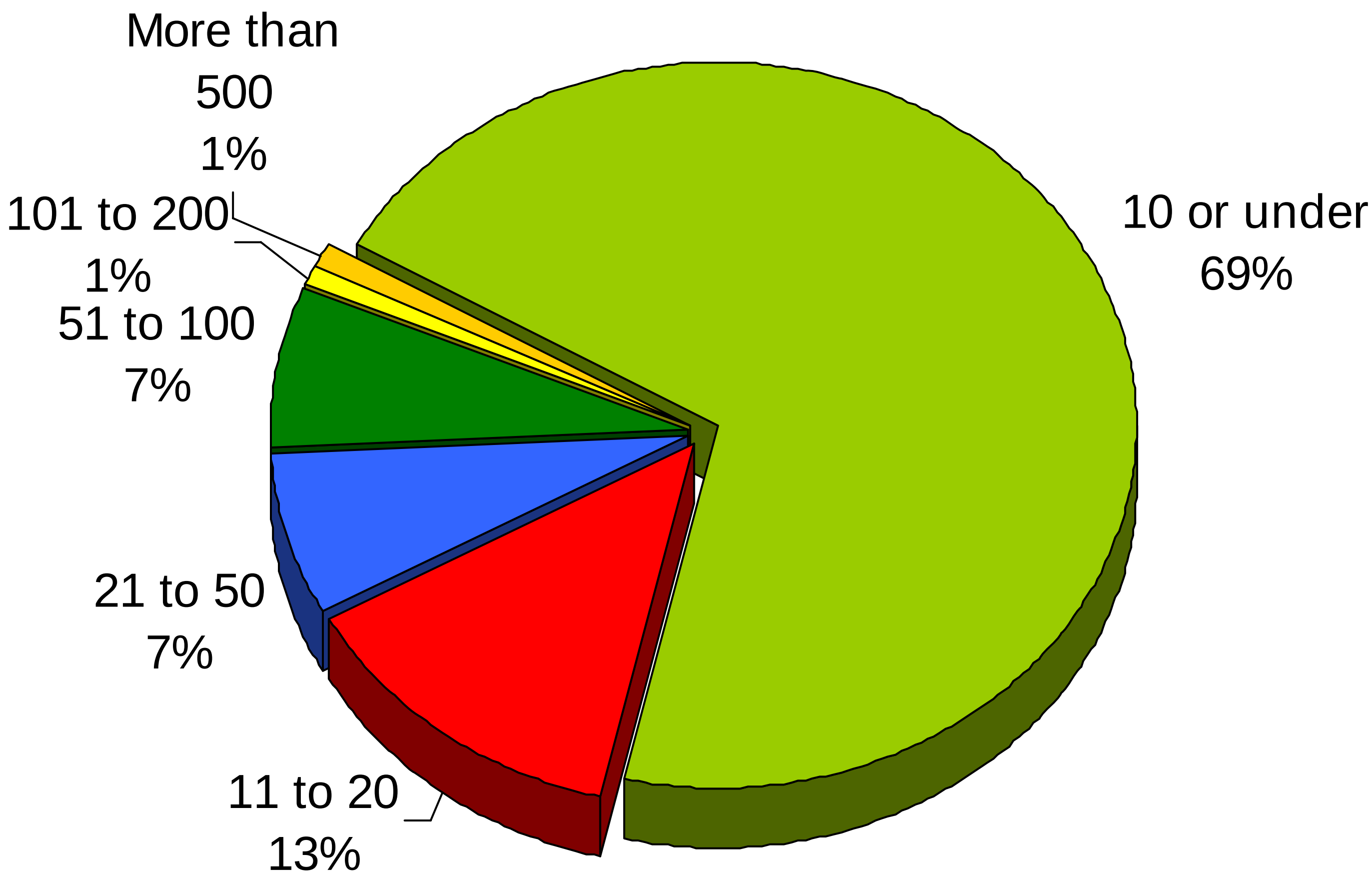
Q3. In which province/territory is your head office located? N=68

Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?.
N=68

Number of Employees



Q5. How many full-time employees are there currently in your company?
N=68

The Market

Genres and Formats Company Interested in Selling and/or Pre-Selling at MIPCOM

	Feature Film	Television	New Media
Documentary/educational	13%	49%	9%
Animation	7%	46%	13%
Children's Programming	3%	46%	12%
Drama	24%	34%	1%
Comedy	10%	31%	6%
Lifestyle	1%	34%	4%
Reality	0%	30%	4%
Action/Adventure	6%	15%	3%
Horror/Thriller	10%	7%	0%
Performing Arts	0%	12%	3%
Sports	0%	10%	4%
Science Fiction	1%	4%	1%
Romantic	3%	0%	0%
Other	1%	4%	4%

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Q6. In deciding to attend MIPCOM 2006, which of the following programming genres was your company interested in selling and/or pre-selling?

Q7. For each of the programming genre(s) of interest to your company, what was the type of media? N=67

Sales/Pre-Sales

- 55 companies indicated that they either completed sales while at MIPCOM or began discussions that are likely to lead to sales while at MIPCOM. 32 companies indicated that they either completed pre-sales while at MIPCOM or began discussions that are likely to lead to pre-sales.
- Of these, 36 companies provided information on 172 deals involving 136 titles.
- Companies reported that 32 distribution agreements were signed.
- Respondents reported that $772,630 of sales were completed while at MIPCOM 2006 and that $17,761,900 worth of sales are likely to occur as a result of discussions initiated at MIPCOM.
- Companies also report that $95,000 of pre-sales were completed at MIPCOM and that they expect $13,815,000 of pre-sales to occur as a result of discussions initiated at MIPCOM.

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Breakdown of Sales and Pre-Sales Deals

Sales

34 Companies

114 Titles

135 Deals

$772,630 Sales completed while at MIPCOM 2006

$17,761,900 Sales likely to occur as a result of discussions completed while at MIPCOM 2006

Pre-Sales

16 Companies

31 Titles

37 Deals

$95,000 Pre-Sales completed while at MIPCOM 2006

$13,815,000 Pre-Sales likely to occur as a result of discussions completed while at MIPCOM 2006

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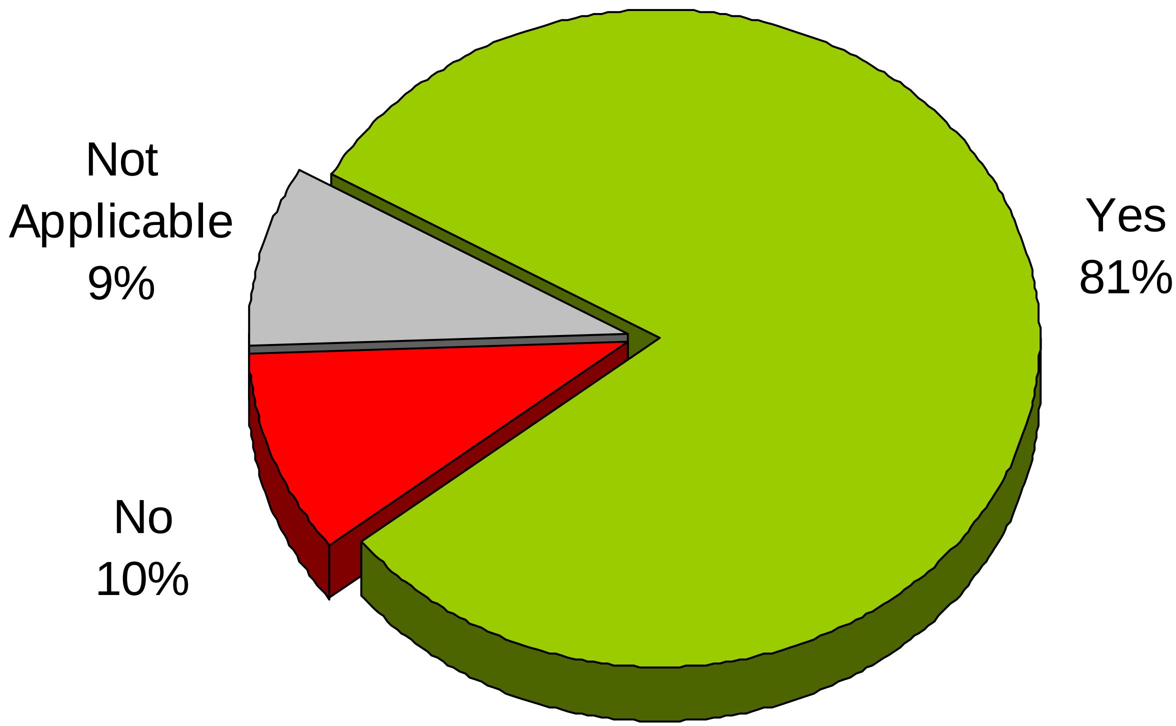
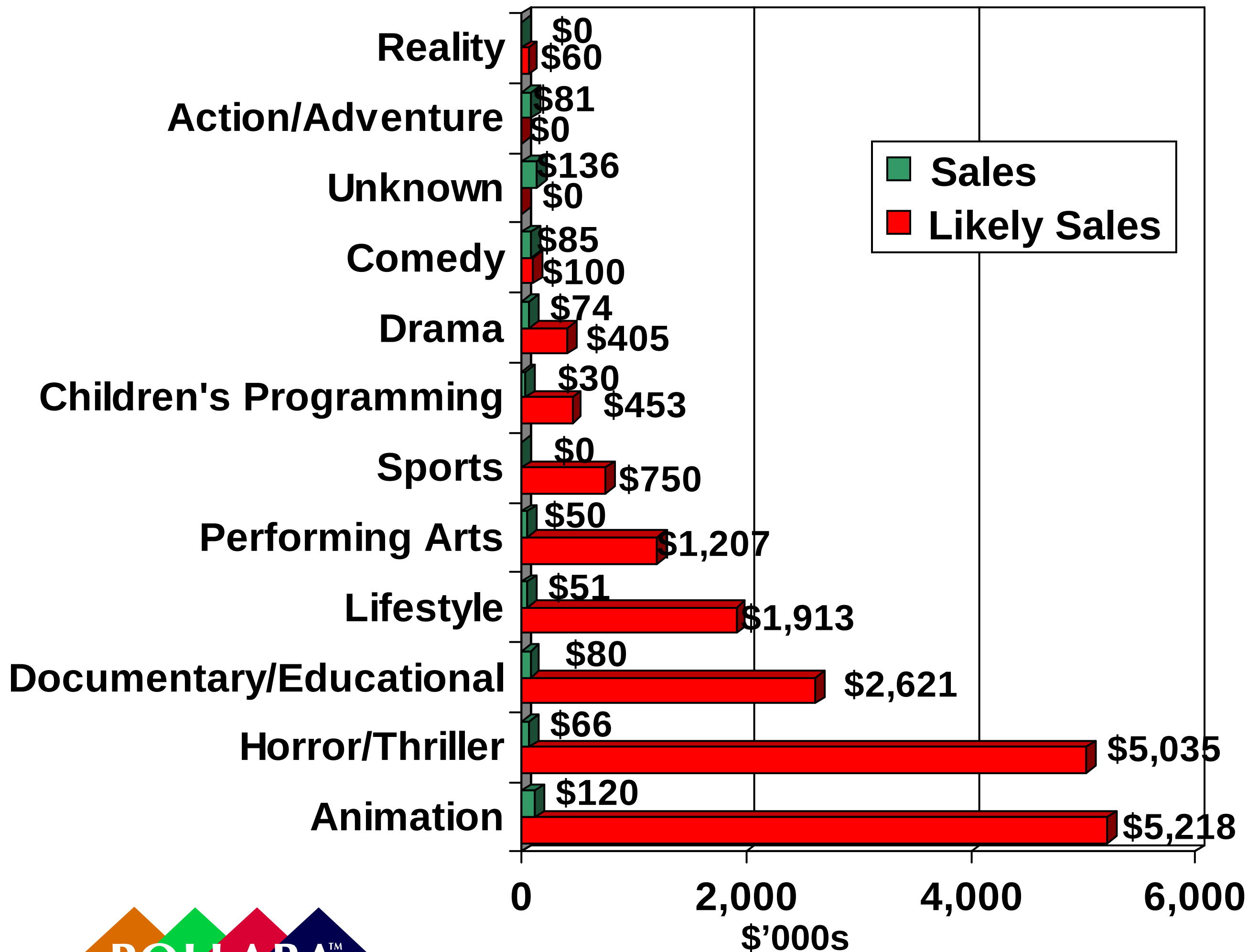
Sales



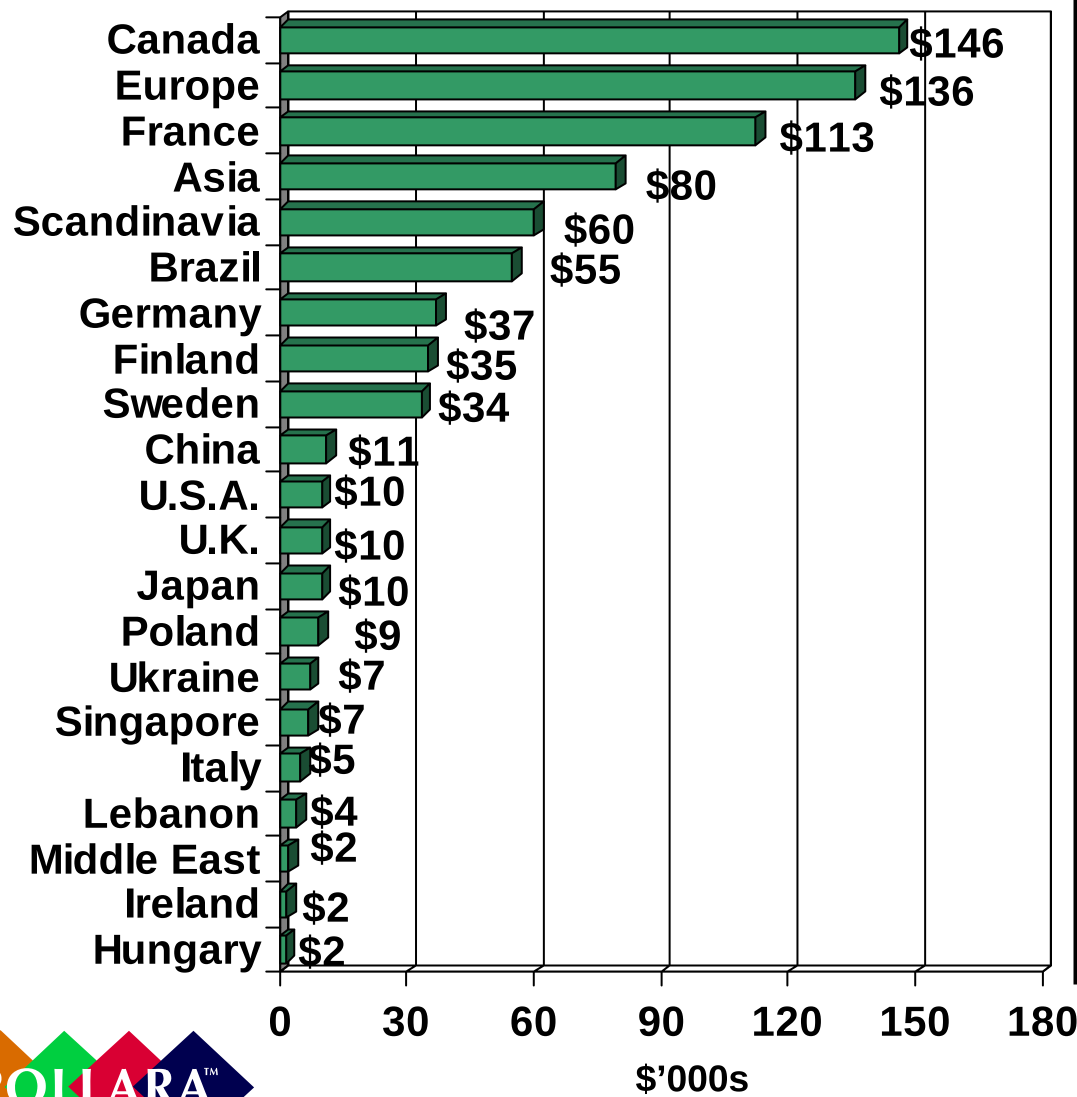
Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at MIPCOM 2006? N=68

Breakdown of Sales and Likely Sales by Genre



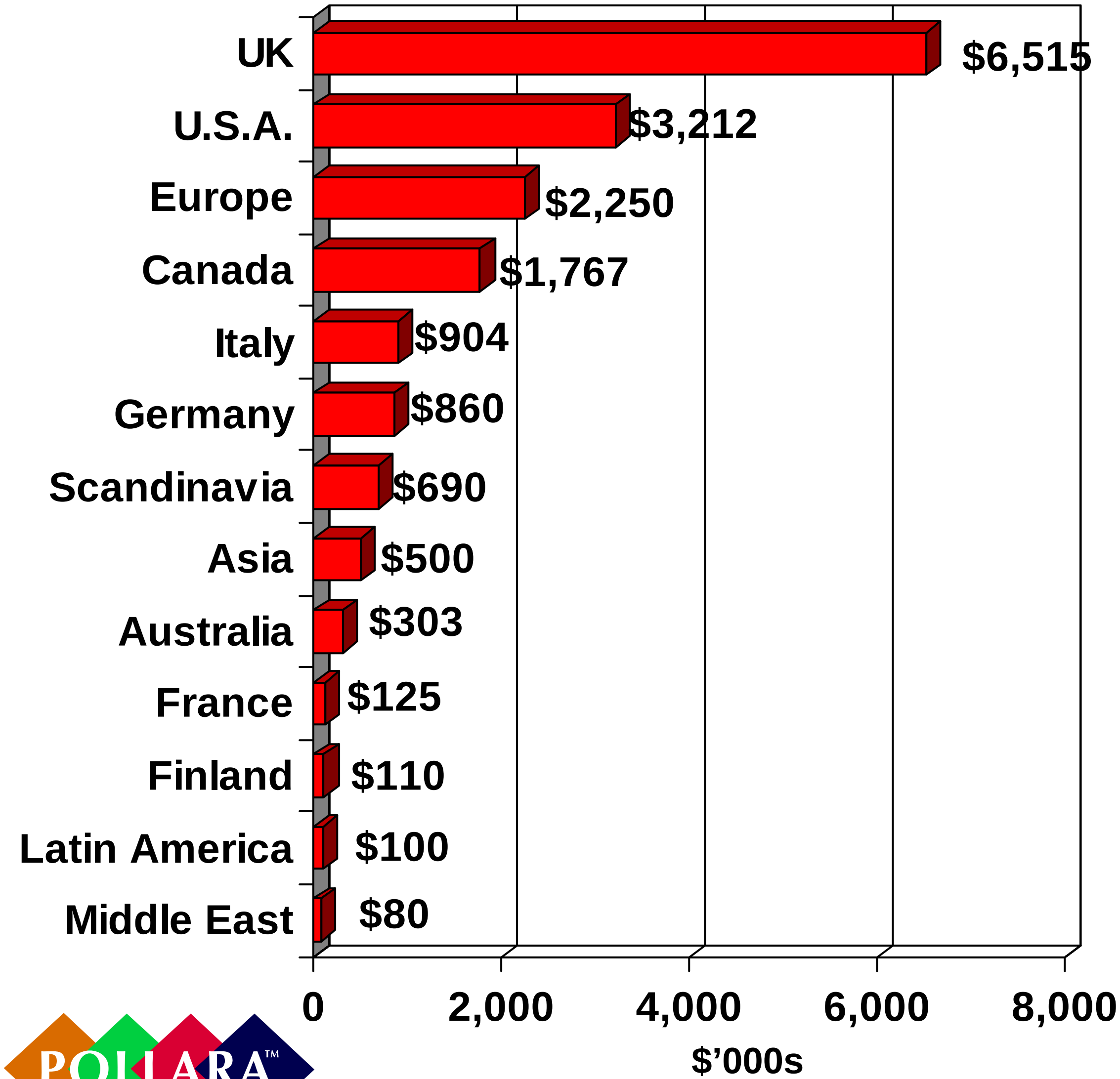
Companies	Titles	Deals
1	1	1
3	3	4
1	5	5
3	5	6
8	18	18
5	11	12
1	1	1
4	5	7
8	11	12
15	32	40
4	6	9
9	16	20

Breakdown of Sales by Country



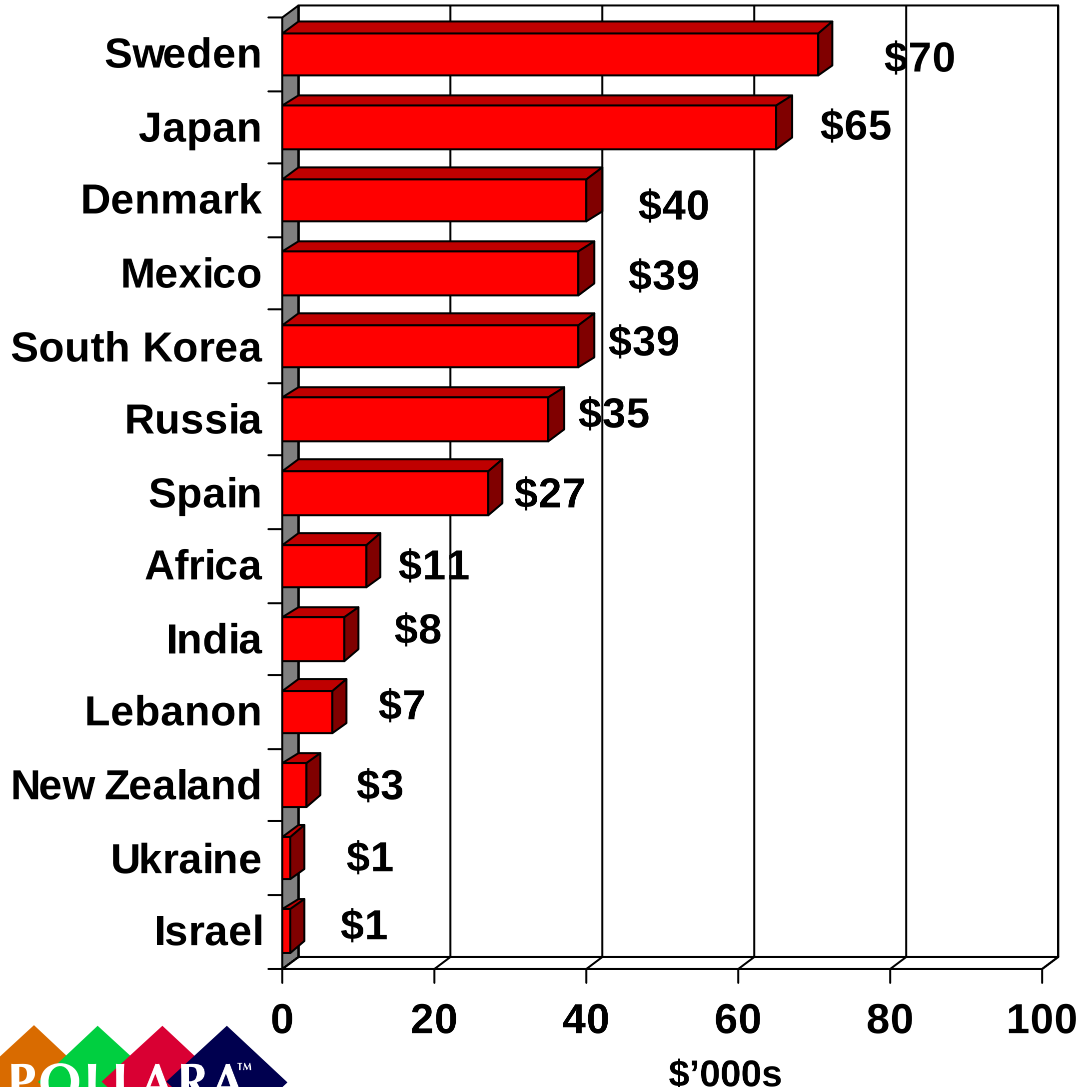
Companies	Titles	Deals
3	3	3
1	5	5
3	4	4
1	2	2
2	2	2
1	3	3
1	2	2
2	2	2
1	2	2
1	1	1
1	1	1
1	1	1
2	5	5
1	1	1
1	1	1
1	1	1
1	2	2
1	1	1
1	1	1
1	1	1

Breakdown of Likely Sales by Country



Companies	Titles	Deals
7	9	9
10	16	16
3	5	5
4	4	4
2	2	2
4	11	11
2	2	2
5	7	7
4	5	5
3	3	3
1	2	2
1	1	1
2	4	4

Breakdown of Likely Sales by Country (Cont.)



Companies	Titles	Deals
2	2	2
3	3	3
1	1	1
1	1	1
1	1	1
1	4	4
2	3	3
1	1	1
2	2	2
1	1	1
2	2	2
1	1	1
1	1	1

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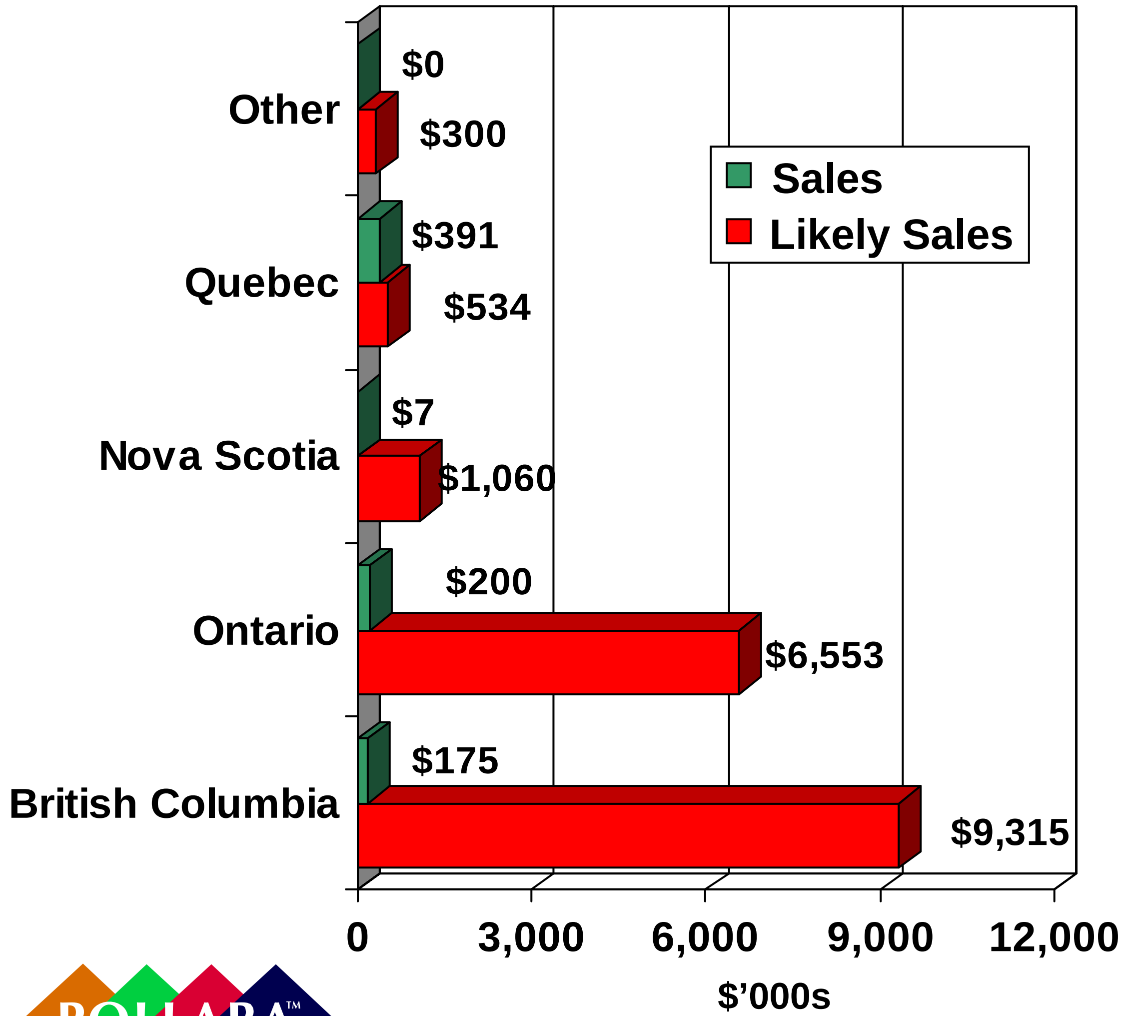
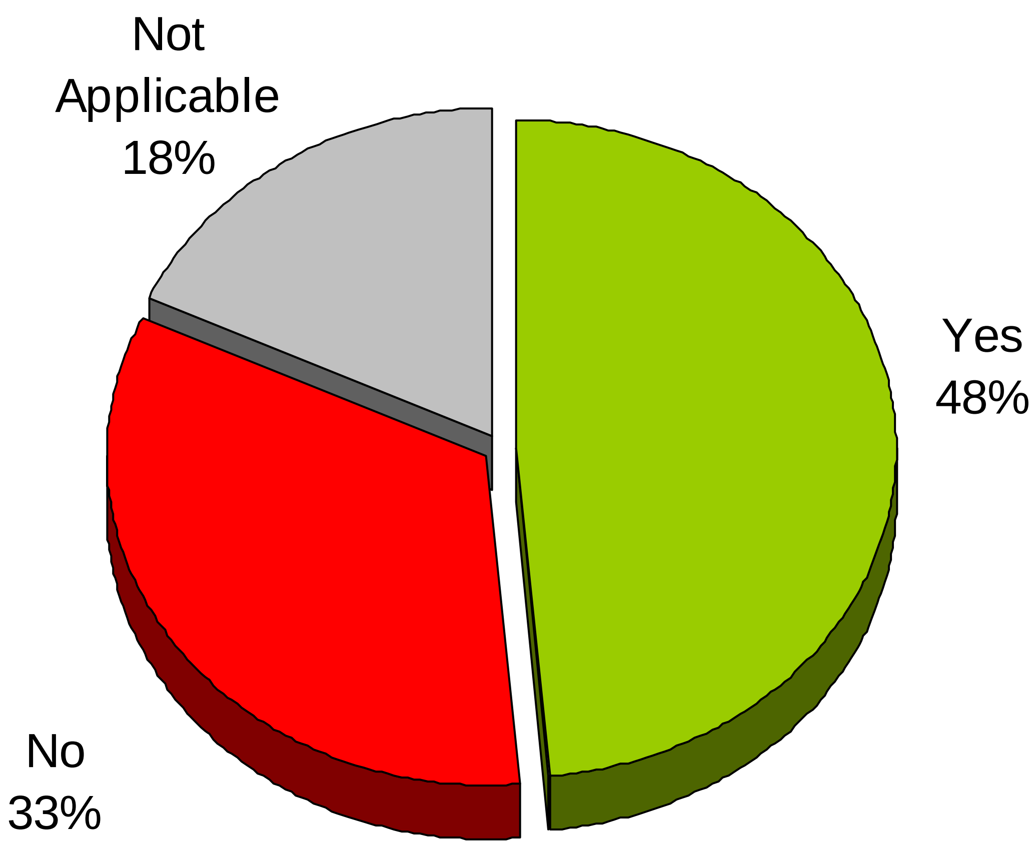
Breakdown of Sales and Likely Sales by Company Region



Companies	Titles	Deals
2	4	4
7	28	34
2	4	5
17	51	59
6	27	33

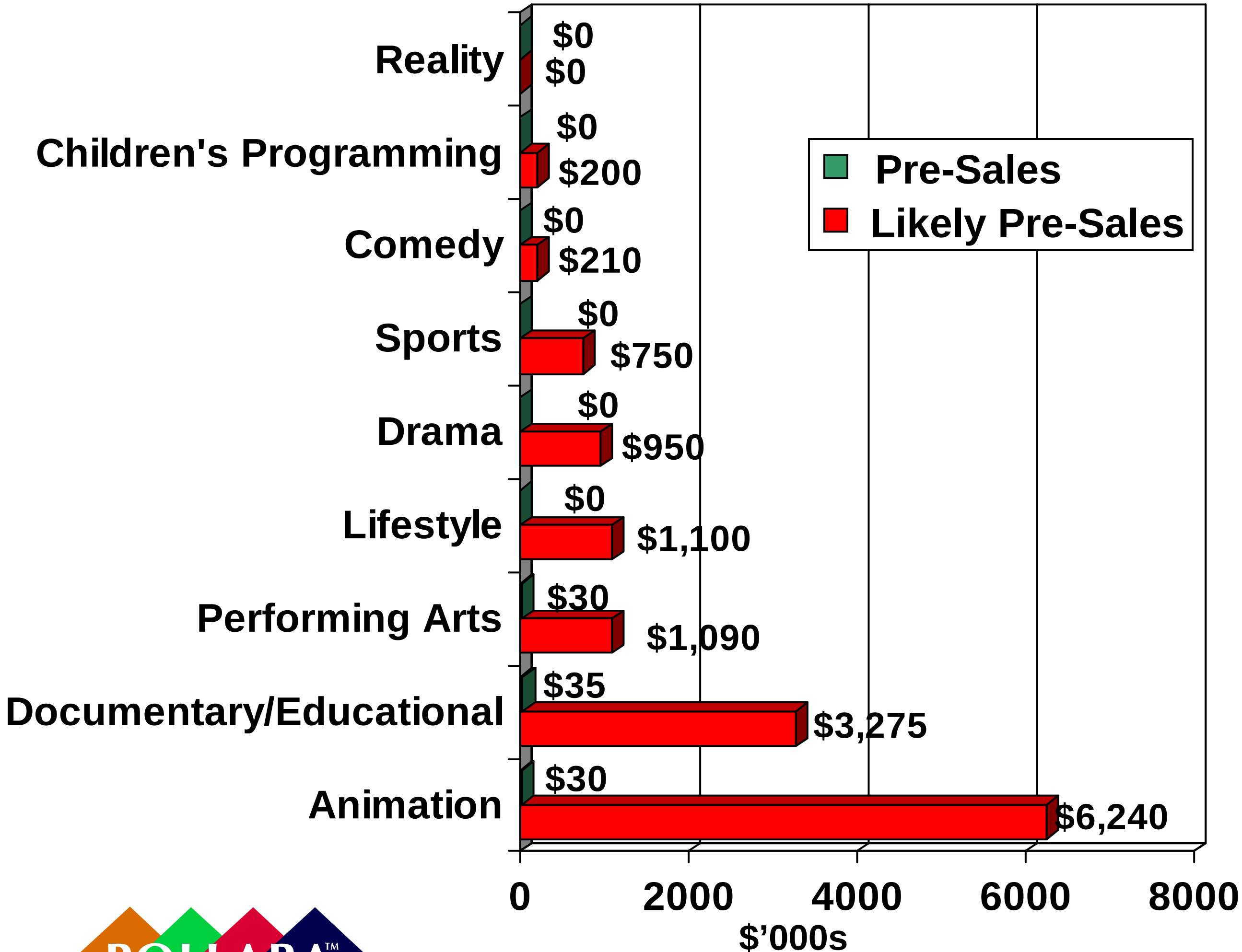
Pre-Sales



Q8e. Did you complete any pre-sales or begin discussions that will likely lead to pre-sales while at MIPCOM 2006?

N=66

Breakdown of Pre-Sales and Likely Pre-Sales by Genre



Companies	Titles	Deals
1	1	1
1	1	1
2	2	3
1	1	1
2	4	5
2	3	3
2	3	3
6	10	12
5	6	8

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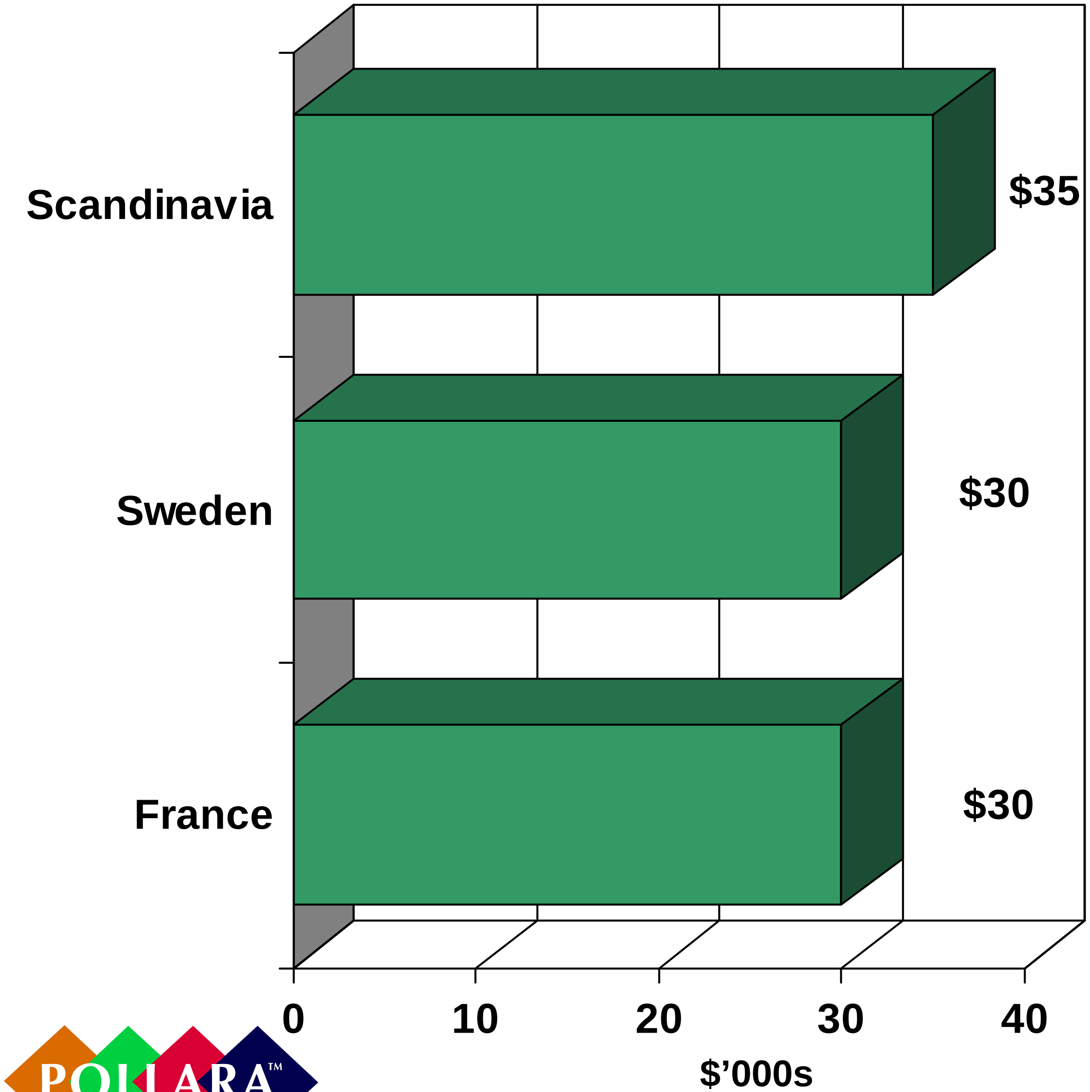
Breakdown of Pre-Sales by Country



Companies	Titles	Deals
1	1	1
1	2	2
1	1	1

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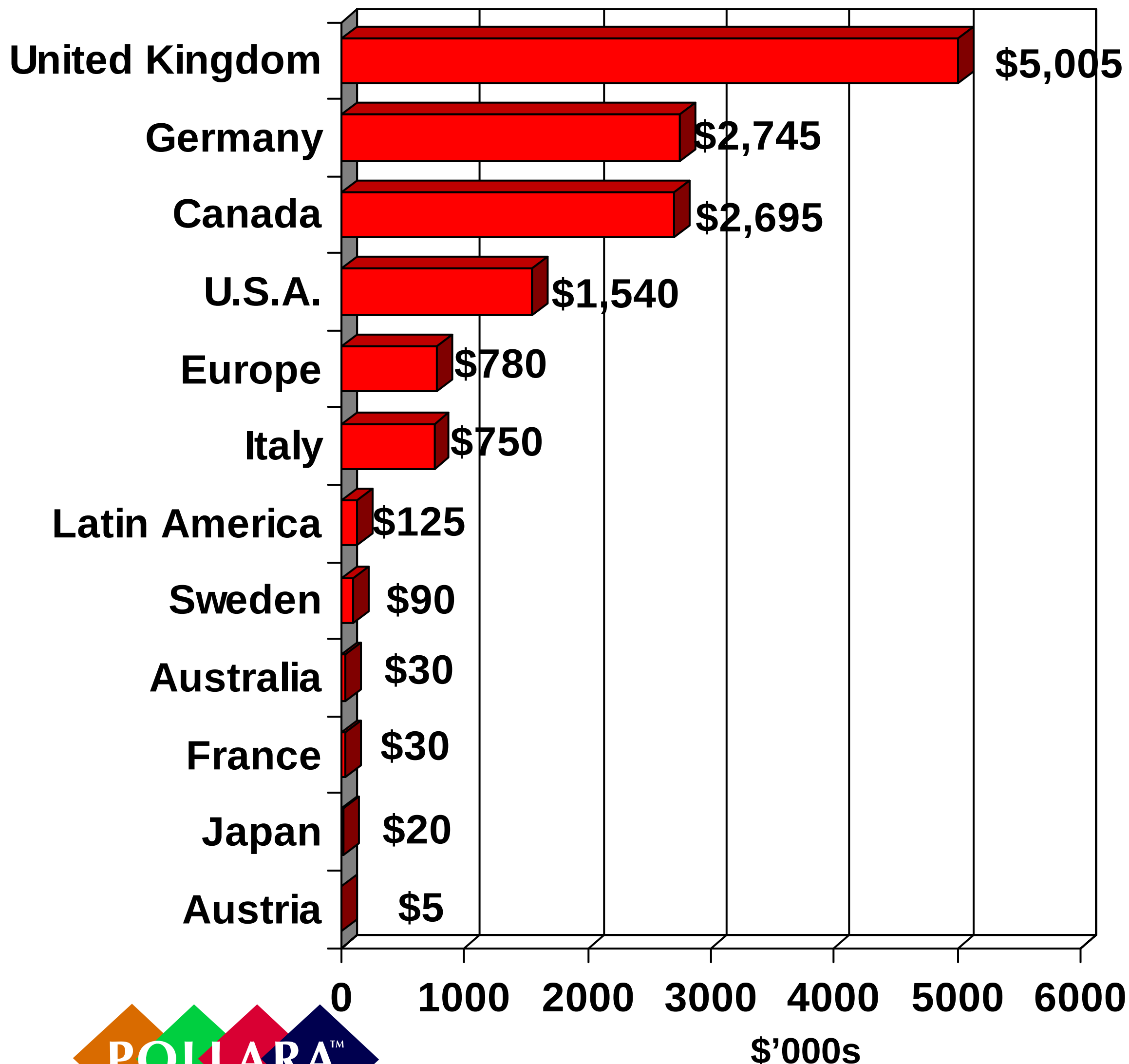
Breakdown of Likely Pre-Sales by Country



Companies	Titles	Deals
5	8	8
3	3	3
4	4	4
3	7	7
3	4	4
1	1	1
1	1	1
1	2	2
1	1	1
2	2	2
1	1	1
1	1	1

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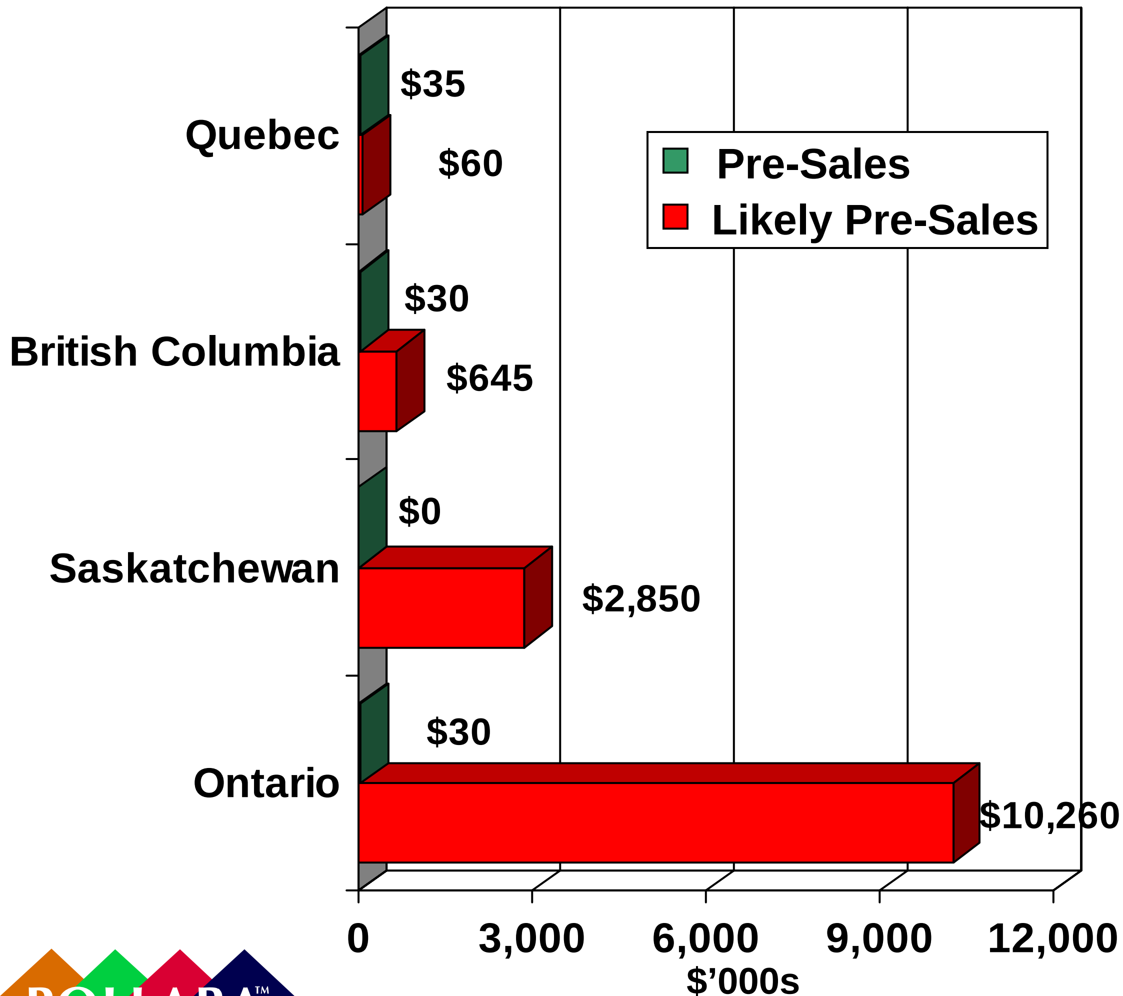
Breakdown of Pre-Sales and Likely Pre-Sales by Company Region



Companies	Titles	Deals
2	2	2
3	4	5
1	3	4
10	22	26

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Co-Production and Co-Venture Deals

- 22 companies (33% of those who completed the survey) indicated that they either signed, or began negotiating co-production or co-venture deals while at MIPCOM 2006.
- However, only 15 of these companies provided answers to all subsequent questions concerning the number of deals, the value of deals, and the countries with which these deals were made.
- 20 companies provided information about the number of co-production or co-venture deals - and reported a total of 39 deals.
- 15 companies provided information about the value of co-production or co-venture deals - and report that the deals were worth $37,382,000.
- 20 companies provided information about the countries with which deals were made.
- Respondents reported that they participated in an average of 42 business meetings each while at MIPCOM 2006.*

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*Note: This average is skewed by two companies that reported participating in over 200 business meetings each - a more representative average is the median number of meetings which is 30 meetings.

Co-Production and Co-Venture Deals

Respondent	Q9b - Number of co-production or co-venture deals	Q9c - Estimated Value of deals to company	Q9d - Countries involved
1	1	$7,000,000	UK
2	1	$6,500,000	UK
3	3	$6,000,000	Europe
4	2	$5,000,000	UK
5	4	$4,000,000	Australia, Canada, Italy, UK
6	1	$2,652,000	UK
7	4	$1,500,000	France
8	1	$1,500,000	France
9	2	$1,000,000	UK, U.S.A.
10	2	$1,000,000	France, U.S.A.
11	1	$800,000	UK

Q9b. How many co-production or co-venture deals were either signed or will likely be signed in the future as a result of discussions initiated MIPCOM 2006?

Q9c. What is the estimated value to your company of these co-productions or co-venture deals (in Canadian Dollars)

Q9d. With which countries are these co-production or co-venture deals?

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Co-Production and Co-Venture Deals (Cont.)

Respondent	Q9b - Number of co-production or co-venture deals	Q9c - Estimated Value of deals to company	Q9d - Countries involved
12	1	$300,000	Australia
13	1	$65,000	Russia
14	2	$40,000	UK
15	1	$25,000	UK
16	3	No Answer	UK
17	3	No Answer	Germany, India, Italy, South Korea, UK, U.S.A.
18	2	No Answer	No Answer
19	2	No Answer	No Answer
20	2	No Answer	Brazil
21	No Answer	No Answer	Ireland
22	No Answer	No Answer	Brazil, UK

Q9b. How many co-production or co-venture deals were either signed or will likely be signed in the future as a result of discussions initiated MIPCOM 2006?

Q9c. What is the estimated value to your company of these co-productions or co-venture deals (in Canadian Dollars)

Q9d. With which countries are these co-production or co-venture deals?

Co-Production and Co-Venture Deals by Company Region

Region	Number of companies	Q9b - Number of co-production or co-venture deals	Q9c - Estimated Value of deals to company
British Columbia	3	5	$12,500,000
Ontario	10	19	$11,340,000
Quebec	5	9	$3,090,000
Saskatchewan	2	4	$2,652,000
Other	2	2	$7,800,000

Q9b. How many co-production or co-venture deals were either signed or will likely be signed in the future as a result of discussions initiated MIPCOM 2006?

Q9c. What is the estimated value to your company of these co-productions or co-venture deals (in Canadian Dollars)

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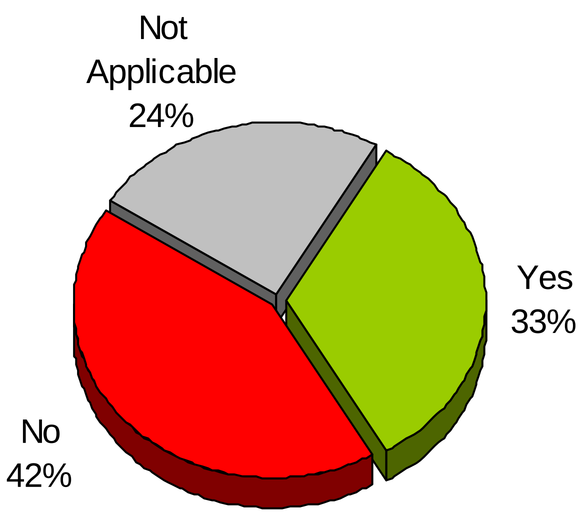
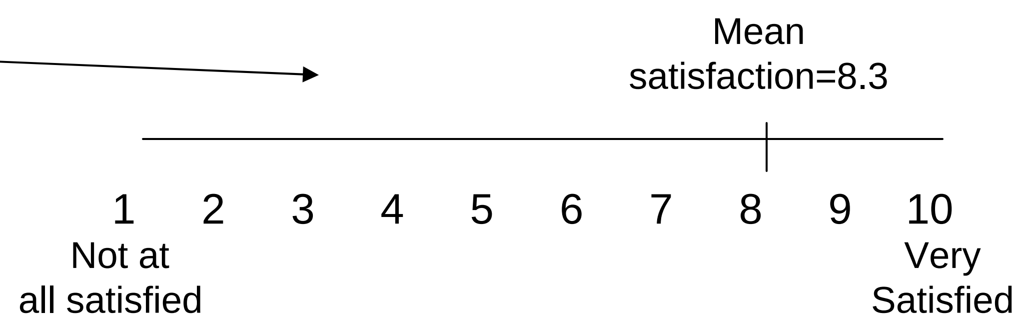
Title Screening

- 33% of respondents indicated that they had a title screened at MIPCOM 2006.
- These respondents gave an average satisfaction score of 8.3 for the visibility their titles received from the screenings

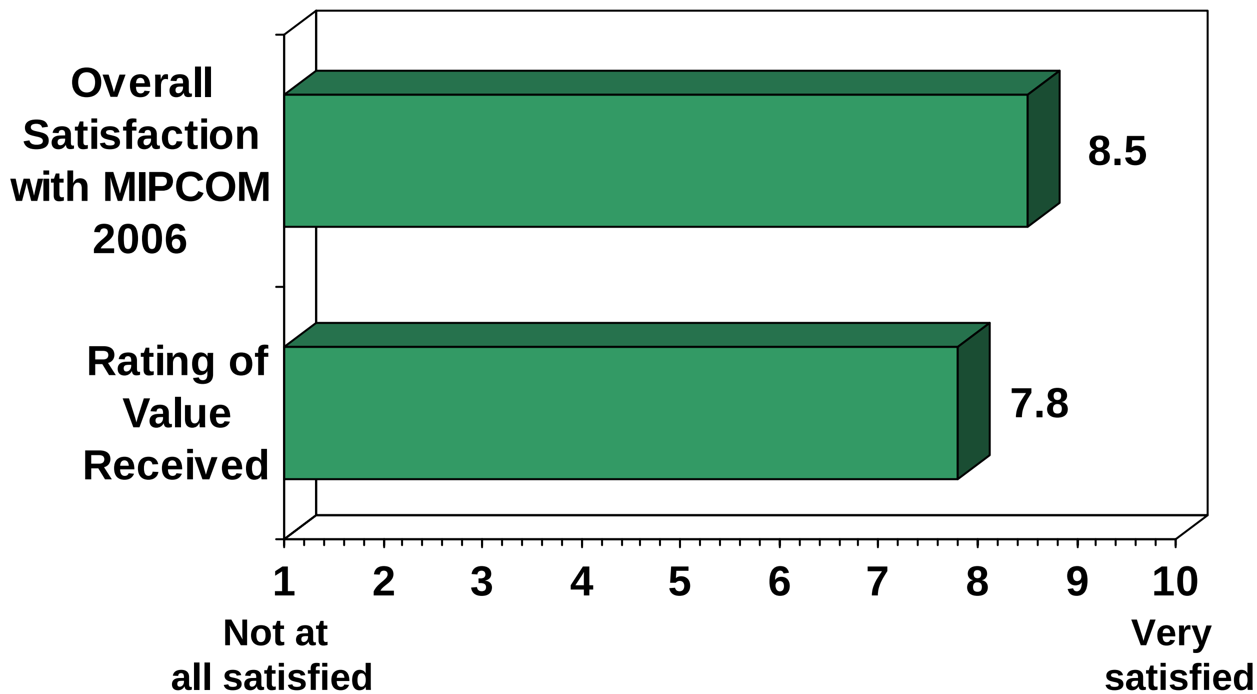




Q11. Were any of your titles screened at MIPCOM 2006 (n=66)

Q12. (IF YES TO Q11) Using a 10-point scale where 1 means you were Not at all satisfied, and 10 means you were Very satisfied, how would you rate your satisfaction with the visibility your titles received from the screenings? (n=22)

Overall Satisfaction With and Value of MIPCOM 2006



Q13a. How satisfied would you say you were overall with MIPCOM 2006 in terms of facilities provided, meeting potential contacts, support, etc... Using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied.

Q13b. And thinking about what it costs your company to attend, and the quality of the services and support provided at MIPCOM 2006, how would you rate the VALUE you received on the same 1-10 scale...

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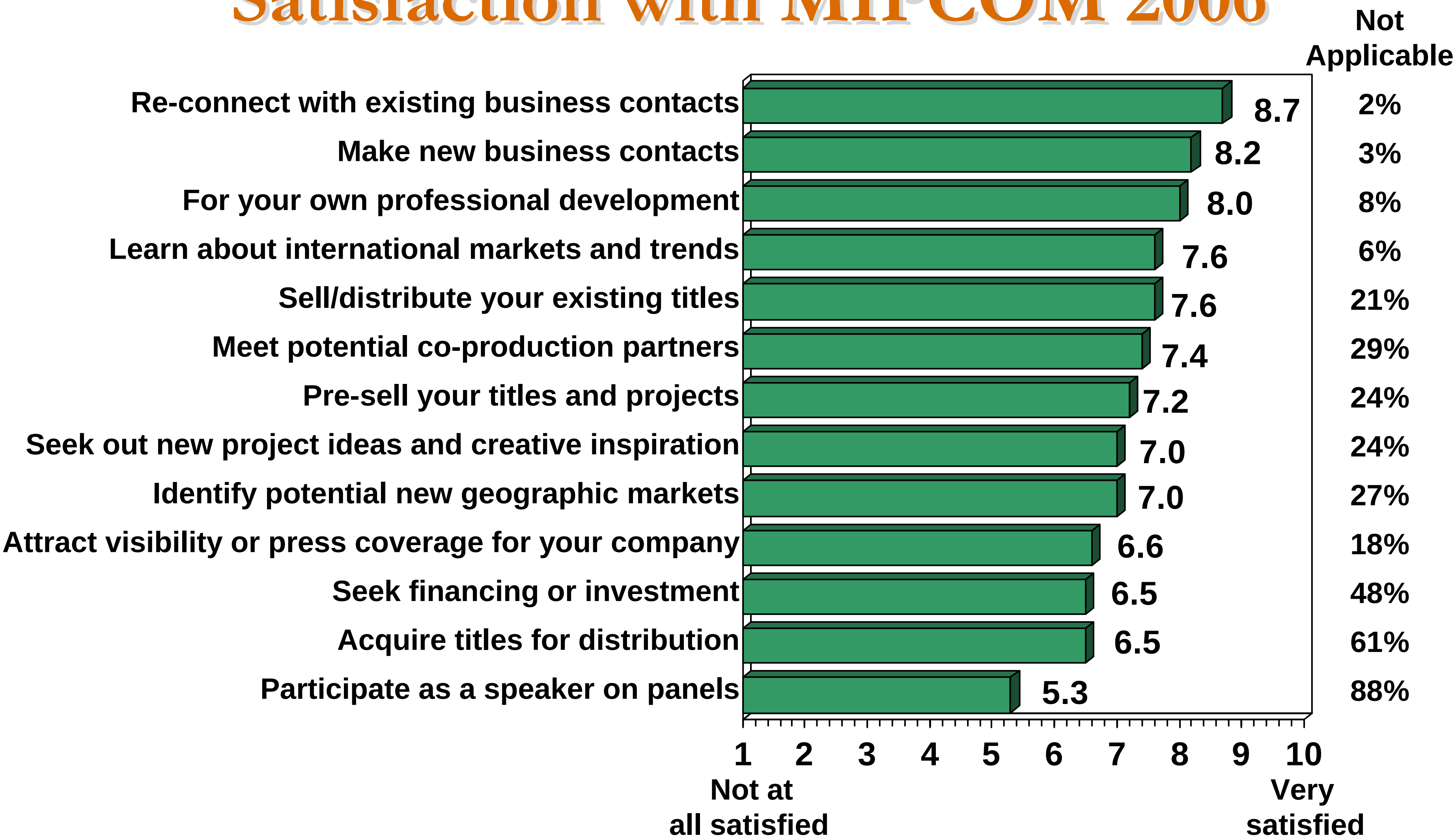
N=66

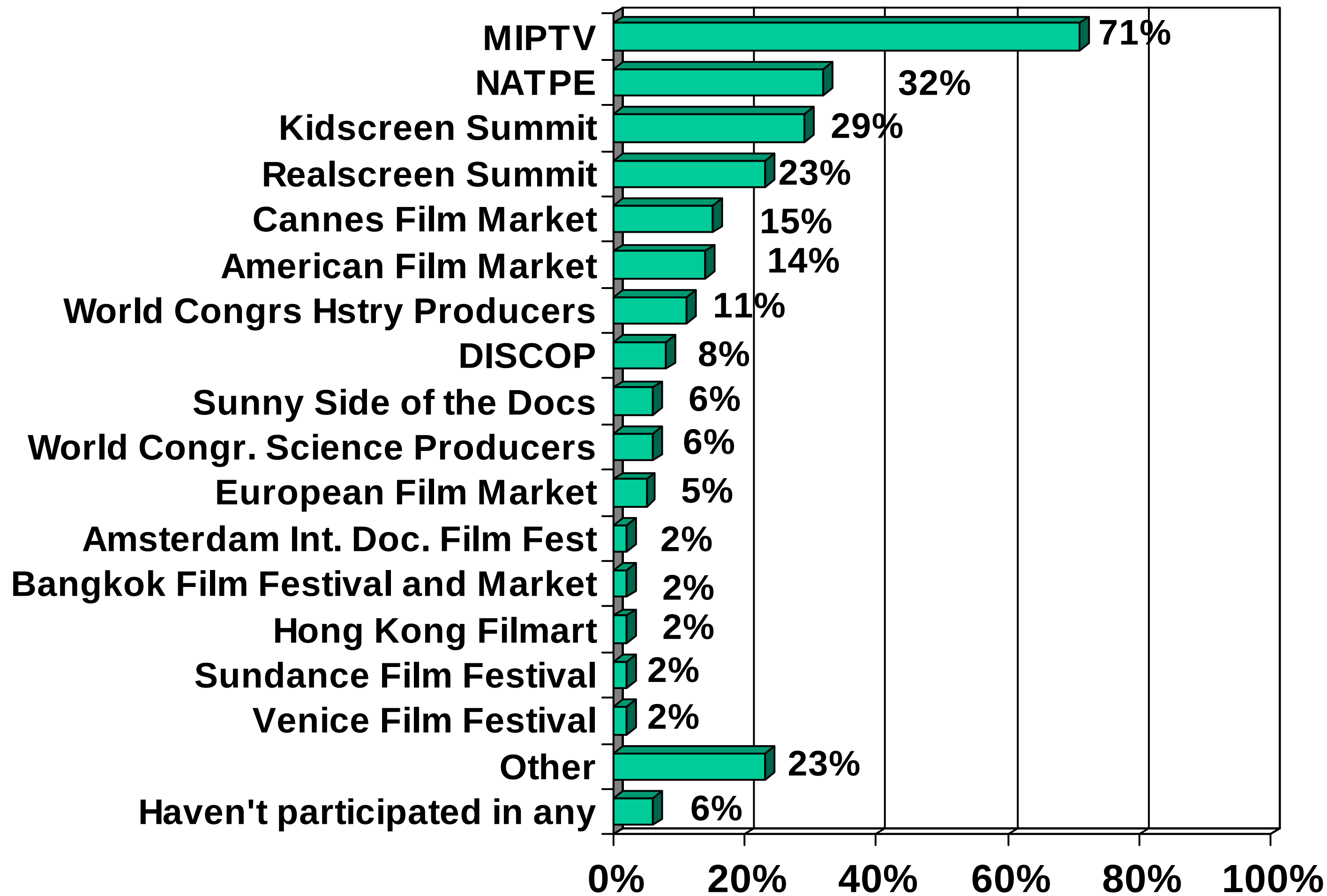
Satisfaction with MIPCOM 2006



Q13c. How satisfied were you with the MIPCOM 2006 in terms of meeting the following objectives for attending, using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. If a particular item does not apply, select, “not applicable”.

N=66

International Markets & Festivals Attended



Q14. Which, if any of the following international markets and festivals held in other countries have you attended during the past two years? *Select all that apply*

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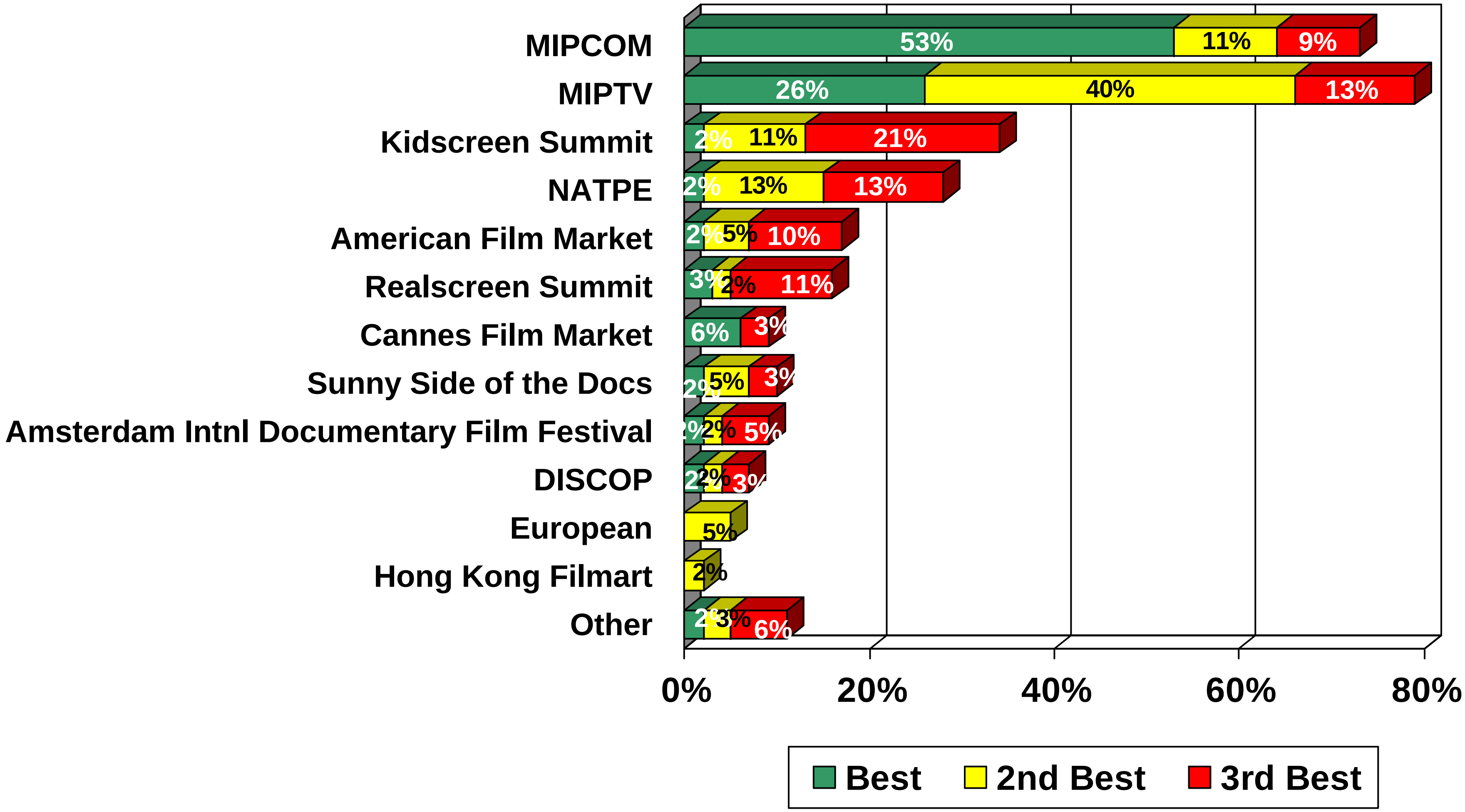
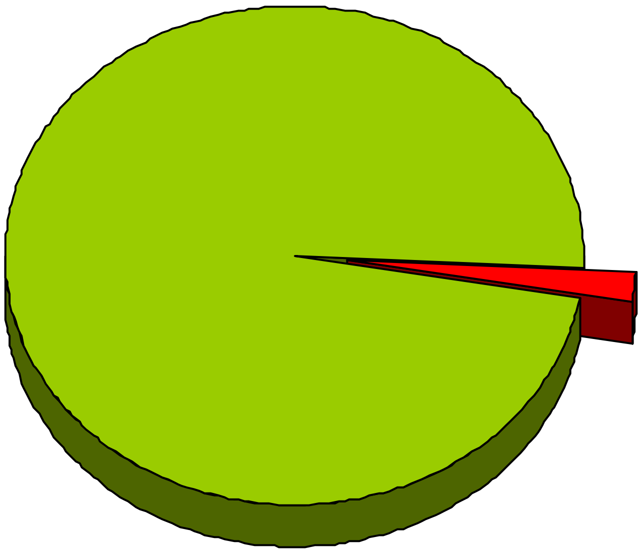
Rating of International Festivals & Markets



Q15 Thinking of MIPCOM together with the other major international events held outside of Canada, which one best meets your needs, is second best at meeting your needs, is third best at meeting your needs?

N=62

Used Services of Canada Pavilion?



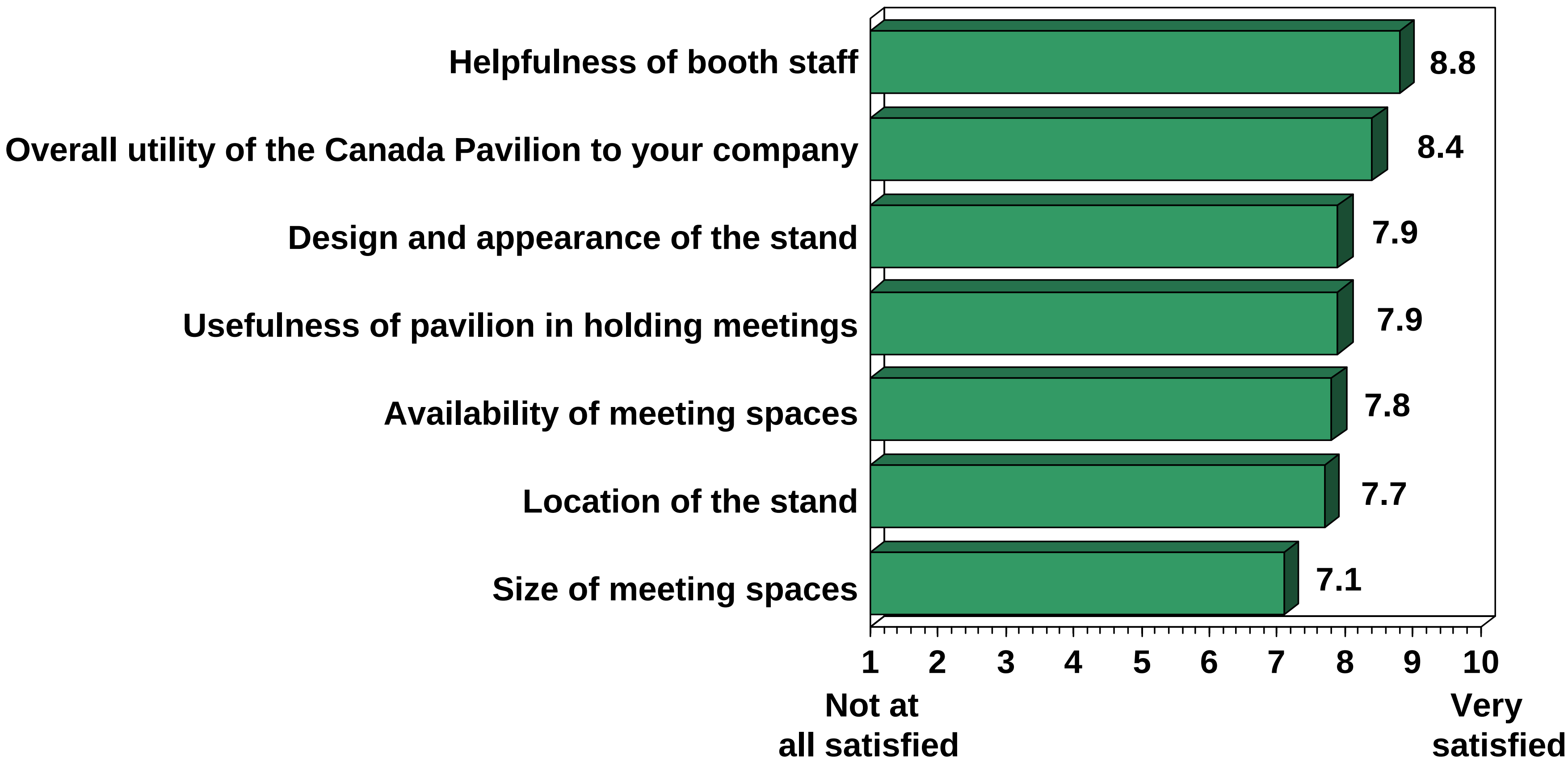
WHY NOT?

- *"Not needed. I tried to use the fax machine but it didn't work."*

Q17 Did you use the services provided by the Canada Pavilion at MIPCOM 2006? N=66

Q18 (IF "NO" TO Q17) Why didn't you use the services provided at the Canada Pavilion? N=1

Satisfaction with Canada Pavilion



Q19 (THOSE WHO DID USE THE CANADA PAVILION) Please rate your level of satisfaction with each of the following aspects of the Canada Pavilion at MIPCOM 2006 using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. If a particular item does not apply, select "not applicable." N=65

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Suggestions for Future Improvements to the Canada Pavilion*

- **A few respondents suggested relocating the Canada Pavilion in future and increasing the amount of space.**
  - *“Move the Canada Pavilion out of the basement onto the main floor.*
  - *“It would be better if we weren't in the basement and had some sunlight and fresh air.”*
  - *“L'espace sous les escaliers est trop bruyant!!! mais le reste est super bien placé.”*
  - *“More booth space available for those willing to pay extra. Ensure that all services and display is set up and working correctly.”*
  - *“More screening spaces, and available meeting areas.”*

Q20 (THOSE WHO DID USE THE CANADA PAVILION) Please provide any suggestions you may have on how the Canada Pavilion could be improved in the future. N=65

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**These slides contain a sample of responses. A complete list of verbatim comments can be found in a separate document.*

Suggestions for Future Improvements to the Canada Pavilion*

- **Better signage and directions were also mentioned as areas for improvement. Having two reception desks caused some confusion.**
  - *"Signage could be improved."*
  - *"More clear direction for visitors as to where individual companies are located within the pavilion. The pavilion spreads over a large space and we are only allocated our space very late so we must use the main reception at 0.01, which is farther from our booth. Would also like more separation between tables in the general area."*
  - *"Please create one central reception area - having two is very confusing for the clients. Also - please implement a more professional messaging system for clients to use when you are not available or at the booth."*

Q20 (THOSE WHO DID USE THE CANADA PAVILION) Please provide any suggestions you may have on how the Canada Pavilion could be improved in the future. N=65

**These slides contain a sample of responses. A complete list of verbatim comments can be found in a separate document.*

Suggestions for Future Improvements to the Canada Pavilion*

- **A few said that the Canadian Pavilion could be redesigned to be more like those of other countries.**
  - *"A better design, like the France Pavilion, would be an improvement."*
  - *"The Canada pavilion does not compare well to the UK PACT pavilion. It is very low-tech, and the location is depressing."*
  - *"Look at the UK Indies Model which includes a nice layout with touch screen demos."*

Q20 (THOSE WHO DID USE THE CANADA PAVILION) Please provide any suggestions you may have on how the Canada Pavilion could be improved in the future. N=65

**These slides contain a sample of responses. A complete list of verbatim comments can be found in a separate document.*

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Suggestions for Future Improvements to the Canada Pavilion*

- **A few respondents commented that the locally hired staff were not as professional as their Canadian counterparts.**
  - *"The Canadian staff manning the booth were excellent, however the local staff were not... They did not have the attitude of assistants, were uncommunicative, self-serving and rude. I recommend these people be thoroughly trained by Canadian Telefilm staff and given the message that they work for us, the producers. Otherwise, I would not register to use the booth again since the 2 times I took meetings there, the staff were rude and unhelpful".*
  - *"We noticed that the amount of prepared Telefilm people decreased and so with hostesses that did not really know the Canadian Business, it seemed like less clients were attracted or directed to the participating companies than in the past."*

Q20 (THOSE WHO DID USE THE CANADA PAVILION) Please provide any suggestions you may have on how the Canada Pavilion could be improved in the future. N=65

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**These slides contain a sample of responses. A complete list of verbatim comments can be found in a separate document.*

Suggestions for Future Improvements to the Canada Pavilion*

- **A few experienced technical problems with the equipment provided.**
  - *“Des problèmes technique causaient des problèmes de qualité d'image cette année.”*
  - *“It would be helpful in future if all of the technical equipment (i.e. TV remotes and head phones) were available for technical checks on the Sunday before the market begins, rather than on the Monday morning.”*

Q20 (THOSE WHO DID USE THE CANADA PAVILION) Please provide any suggestions you may have on how the Canada Pavilion could be improved in the future. N=##

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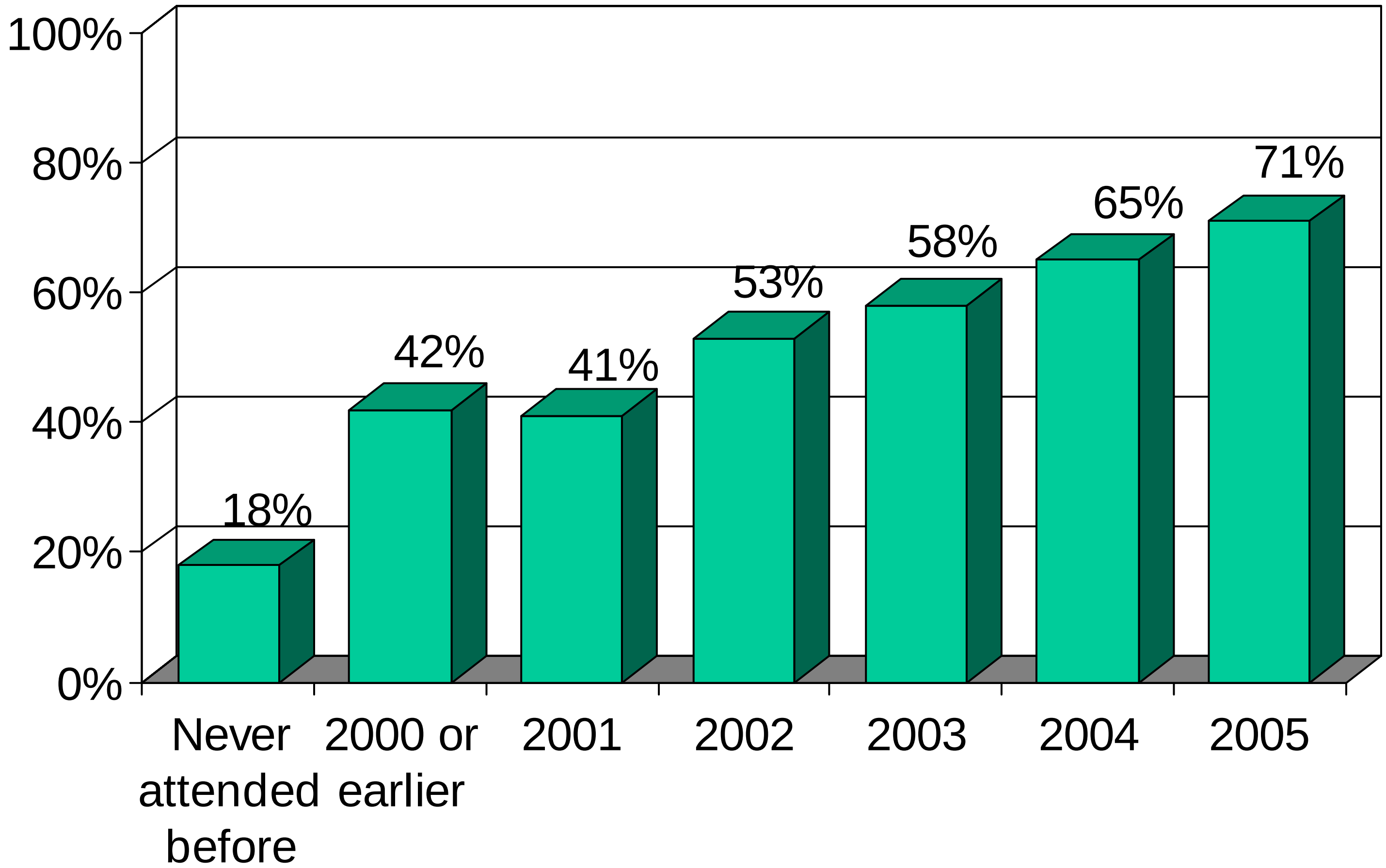
**These slides contain a sample of responses. A complete list of verbatim comments can be found in a separate document.*

Past Attendance at MIPCOM



Q21. Which previous MIPCOM events, if any, has your company attended?
Select all that apply

N=66

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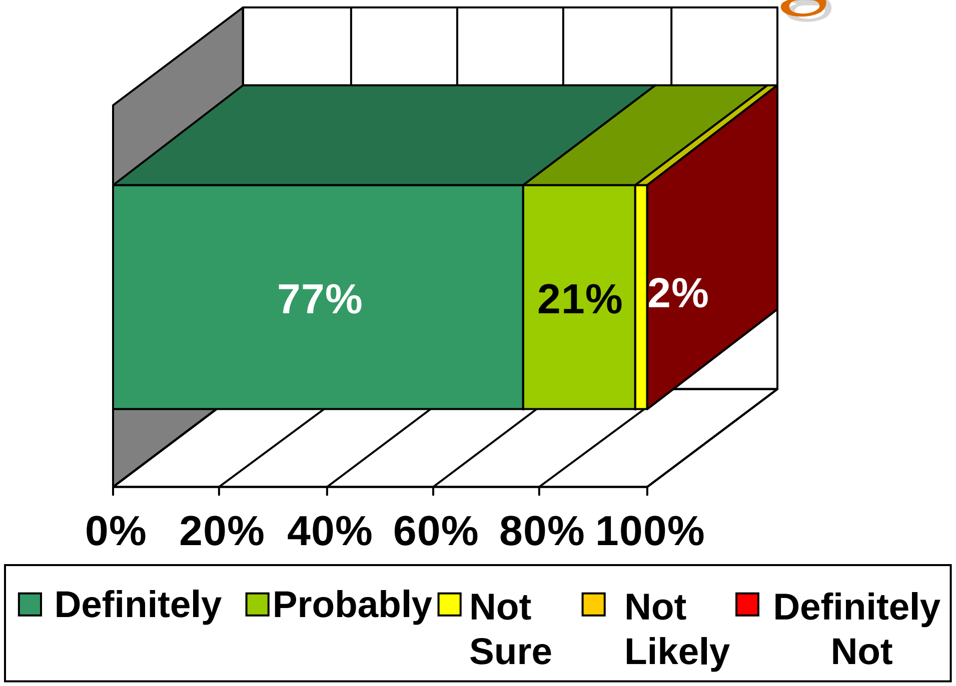
Likelihood of, and Reasons for, Recommending MIPCOM to Others*



- ***"It's the central marketplace (along with MIPTV) for the television industry. Everyone who is serious about producing television should attend."***
- ***"MIPCOM is a premiere international broadcast sales market. Commissioning editors from around the world attend. There are great opportunities to pitch ideas, secure licences and talk to distributors who have a strong sense of upcoming trends."***
- ***"It is the most efficient way to tap into the international marketplace for television and emerging media."***

Q22a. Would you recommend MIPCOM to other companies in the Canadian audio-visual industry? N=66

Q22b. Please explain your answer. N=65

**These slides contain just a brief sample of responses. A complete list of verbatim comments can be found in a separate document.*

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Reasons for Recommending MIPCOM to Others*

- *“MIPCOM is a great place to see what the world is producing and creating in visual entertainment.”*
- *“Like MIPTV, I think MIPCOM is an excellent venue for meeting all of my international clients as well as a handful of domestic broadcasters.”*
- *“Attendance at this market event is crucial in order to ensure competitiveness in international markets, research for new programming, program development and co-production / broadcaster relationships.”*
- *“Canadian Distributors and Producers alike should attend as many international events as possible to be able to be competitive in the market. It is practically impossible to finance production and keep the quality required if staying in Canada. International is not a luxury but a need. “*

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Q22b. Please explain your answer.

**These slides contain just a brief sample of responses. A complete list of verbatim comments can be found in a separate document.*

Cost of Attending MIPCOM 2006

- Companies incurred an average cost of $15,000 in attending MIPCOM 2006*
- 30% of respondents (20 companies) indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend the event.
- Only 6 companies reported receiving federal funding (average of $1967 each).
- 13 companies provided details of the provincial funding they received. These companies received an average of $4,400 each in provincial funding.

*Note: This average is skewed by a few companies that reported spending in excess of $40,000 to attend. - a more representative average is the median cost of $10,000.

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Other Comments*

- *"As important as MIPCOM and MIPTV are, the costs in attending and exhibiting there have become very high. It would be helpful if Telefilm could find ways to reduce the costs to exhibitors!"*
- *"Do not raise prices for the booths if at all possible. It may preclude small to medium level businesses from attending."*
- *"Toujours s'assurer du meilleur rapport qualité/prix... Les coûts ont tendances à augmenter depuis quelques années et les affaires de plus en plus difficile, ce qui rendra la participation de certaines entreprises encore plus difficile à cause de cette réalité économique. Il faudra faire certains choix si les prix ont tendance à fluctuer dans le futur."*

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Q26. Finally, please provide any other comments you have concerning MIPCOM 2006 or suggestions for improving the support provided by Telefilm and its partners. N=65

**These slides contain just a brief sample of responses. A complete list of verbatim comments can be found in a separate document.*

Other Comments*

- *“I don't have any other suggestions...Other than my DVD player did not play well for the first day, which was terrible. A tech check should have been made on all equipment before the show began.”*
- *“The monitors were not good at all. The colour was terrible and I know this was a problem for everyone. Someone suggested this was because they were PAL machines. It was a big problem because obviously we want our clients to see the best possible picture of our programmes.”*
- *“Provide more sophisticated messaging systems for attendees of the market”*

Q26. Finally, please provide any other comments you have concerning MIPCOM 2006 or suggestions for improving the support provided by Telefilm and its partners. N=65

**These slides contain just a brief sample of responses. A complete list of verbatim comments can be found in a separate document.*

Other Comments*

- *"Create a DVD with trailers of each of the participating companies, perhaps. Or have a screening facility, such as at MIPCOM Jr, where buyers can screen Canadian programs. Keep up the good work!"*
- *"Ne réduisez pas les services offerts aux marchés MIPTV et MIPCOM!!! Ils sont essentiels pour des petites entreprises comme la notre."*
- *"Overall it's a very welcome support without which we would not be able to attend with the same profile. We appreciate being able to be a part of the Telefilm booth."*
- *"The Markets and Festival staff are very prepared and professional. They know exactly what needs to be done and provided. My suggestion would be for TFC to support them and their expertise and allow them to perform their jobs with the proper staffing. It is better for our industry overall to allow the experts to share their expertise."*

Q26. Finally, please provide any other comments you have concerning MIPCOM 2006 or suggestions for improving the support provided by Telefilm and its partners. N=65

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