

MIPTV 2007
Outcomes Report

Conducted by:



For:
Telefilm Canada

June 2007



Methodology

Methodology

- A total of 70 e-mailed invitations were sent to Canadian companies that attended MIPTV 2007.
- 55 of the 70 companies clicked on the link in the e-mail invitations to go to the survey site.
- Of these 55, 51 completed all of the survey - a 73% response rate.
- The survey was open from May 7 until June 22, 2007.
- During the course of the survey, POLLARA made multiple attempts to follow up with non-responding companies through e-mail and telephone calls to encourage them to participate. In addition, POLLARA asked members of the IIAC to follow up with non-responding companies in their respective provinces.

Methodology

E-mail invitations sent to 70 companies



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



51 companies reached the
end of the survey

- Despite the relatively high response rate, there remains a possibility of non-response bias (for example, are the companies that answered the survey smaller or larger than those that did not? Are some provinces over/underrepresented?).
- Consequently, Telefilm should exercise some caution when reviewing these results.

Sample and Respondents by Province

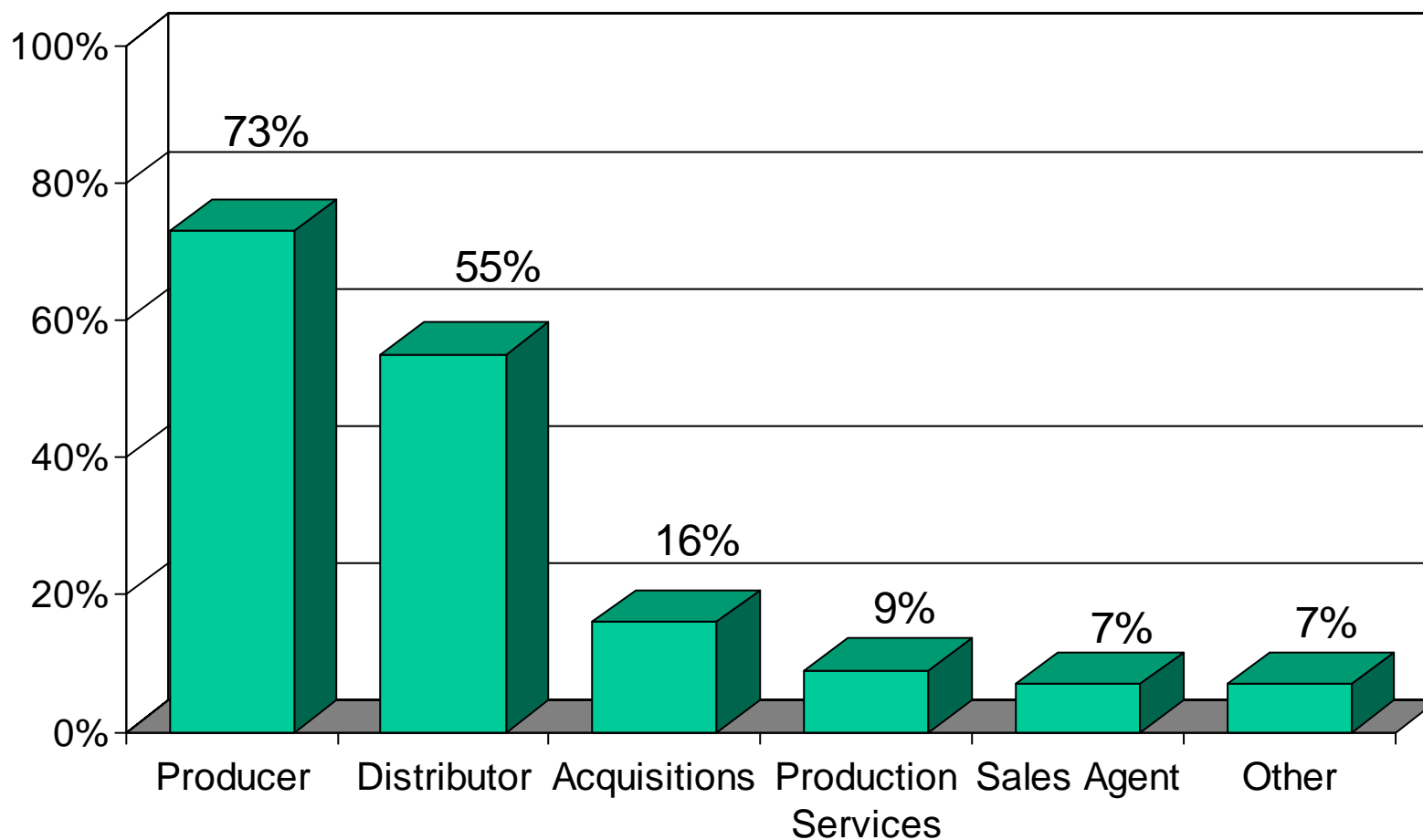
- Broken down by province, the sample consisted of the following companies.

Province	Number of companies in sample	Number of companies starting survey	Number of companies completing survey
Ontario	40	34	32
Quebec	14	10	8
British Columbia	9	4	4
Alberta	2	2	2
Saskatchewan	2	2	2
Manitoba	1	1	1
Nova Scotia	1	1	1
P.E.I.	1	1	1
Total	70	55	51



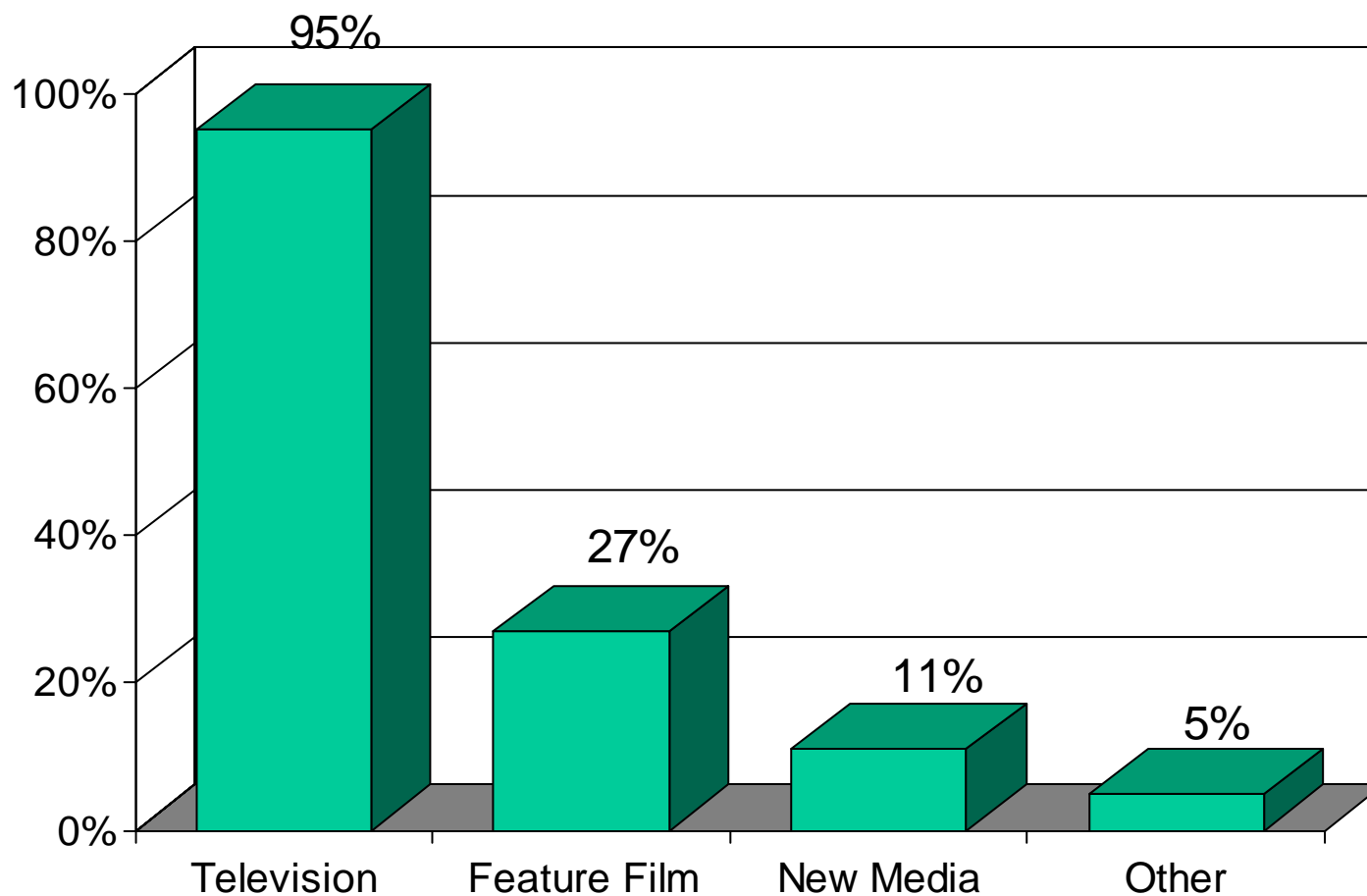
Respondent Profile

Primary Business Focus of Company



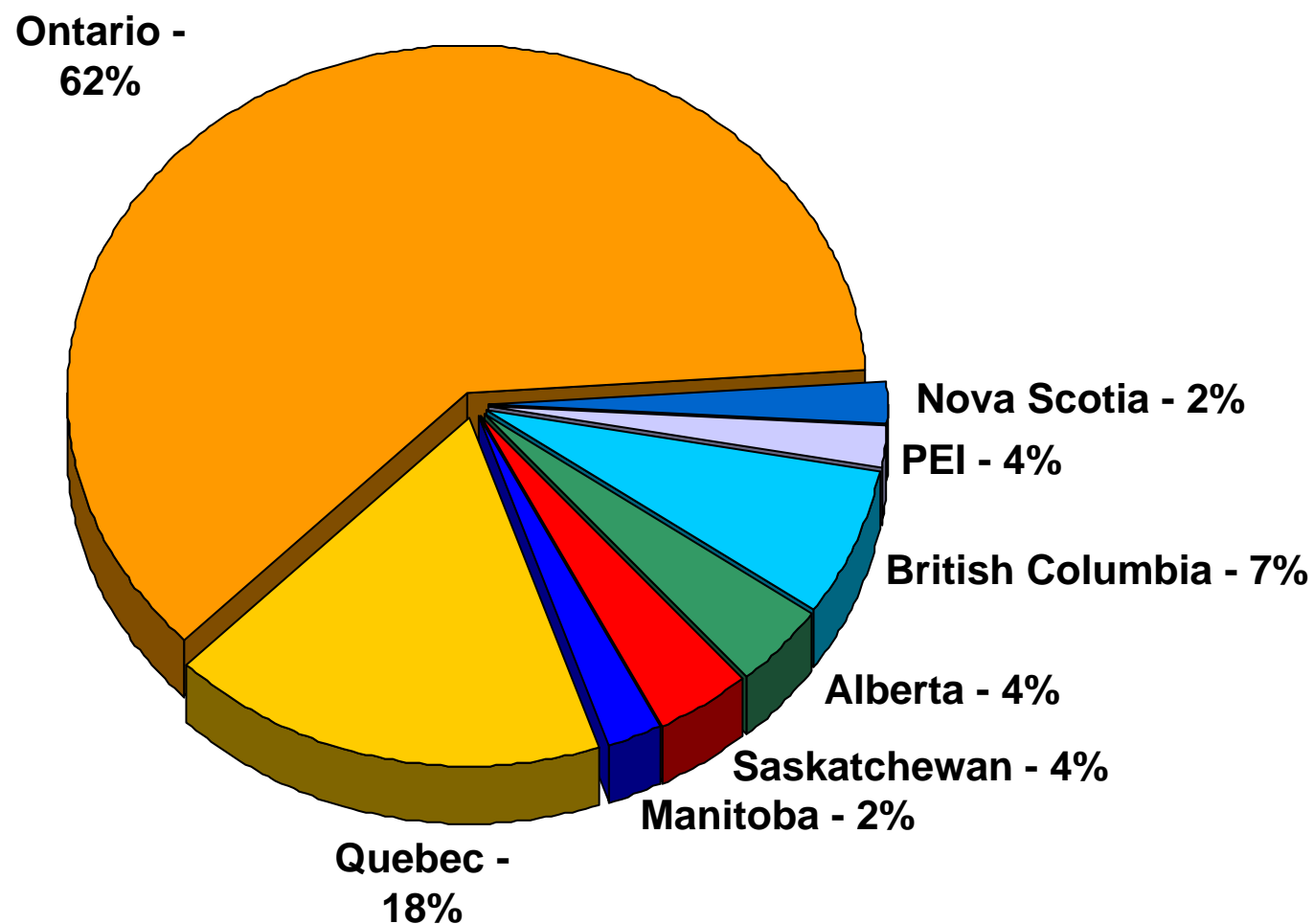
Q1. What is the primary business focus of your company? *Select all that apply.*
N=55

Main Format(s) of Interest

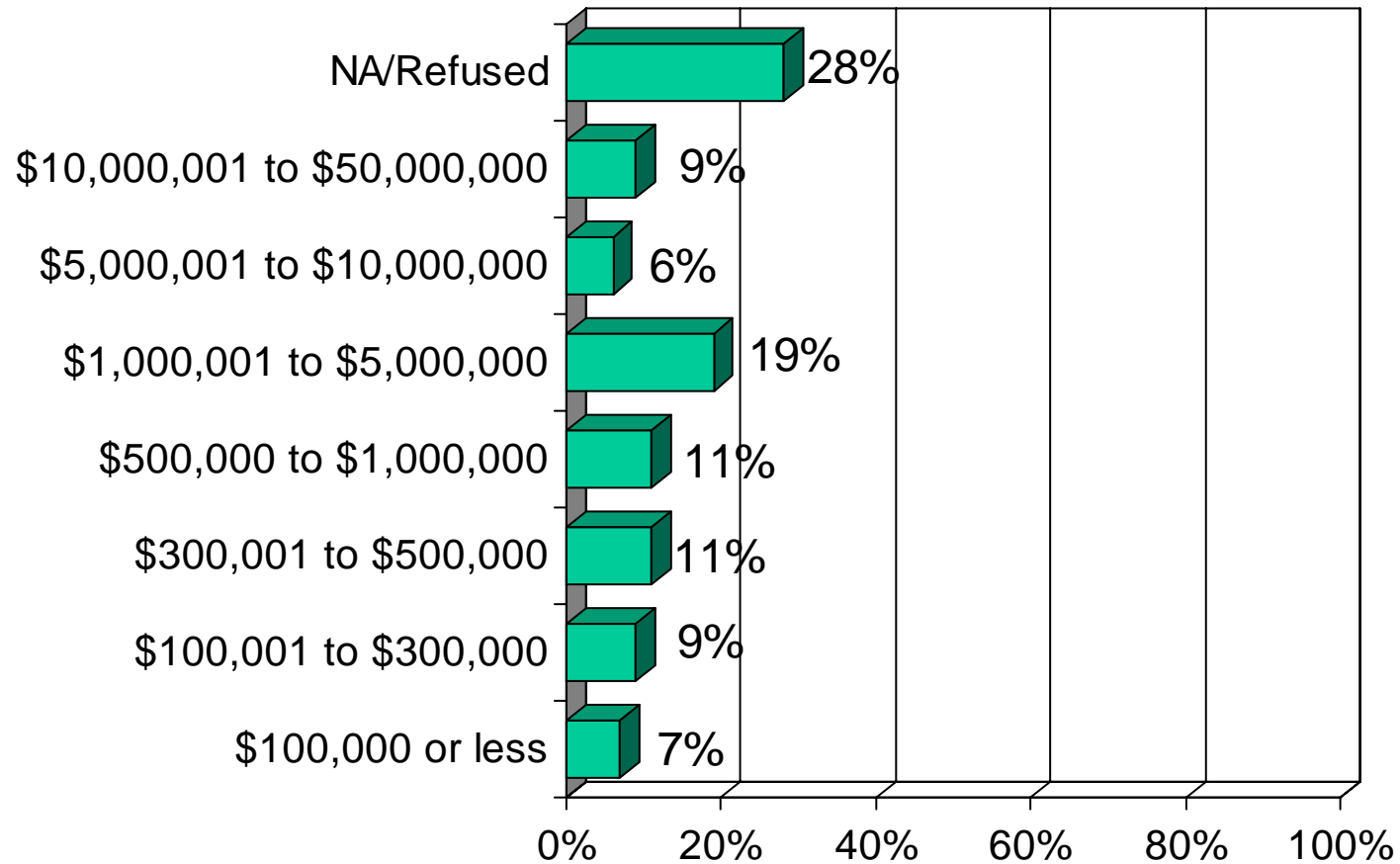


Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=55

Location of Head Office

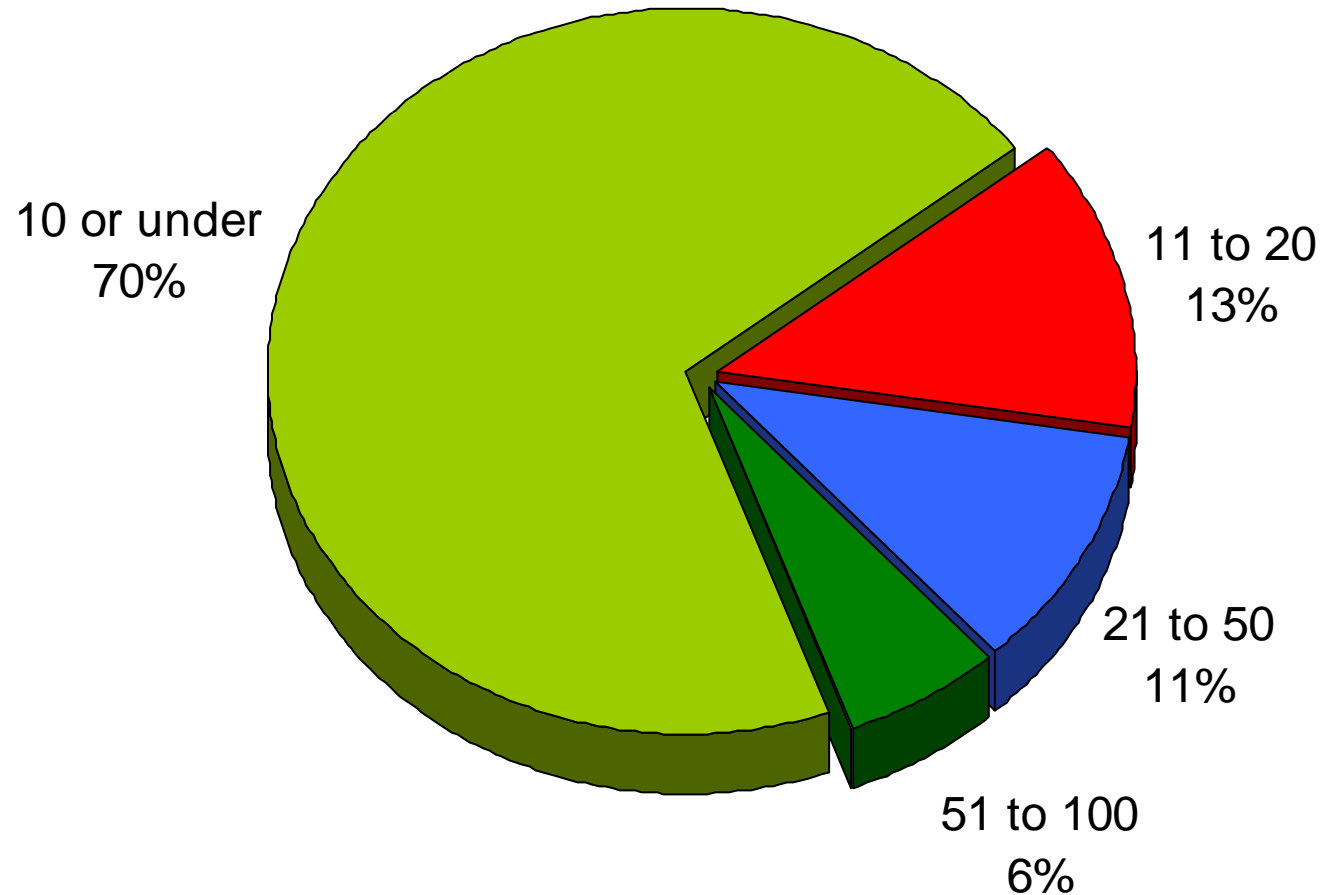


Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?
N=54

Number of Employees





The Market

Genres and Formats Companies Interested in Selling and/or Pre-Selling at MIPTV 2007

	Television	Feature Film	New Media
Animation	42%	13%	23%
Documentary/Educational	55%	6%	9%
Children's Programming	49%	8%	11%
Lifestyle	47%	0%	8%
Drama	30%	19%	0%
Comedy	26%	9%	4%
Reality	30%	0%	4%
Action/Adventure	9%	8%	0%
Sports	11%	0%	2%
Horror/Thriller	2%	6%	0%
Science Fiction	6%	2%	0%
Performing Arts	6%	0%	0%
Public Affairs	6%	0%	0%
Romantic	2%	4%	0%
Erotica	2%	0%	0%
Other	13%	0%	8%

Q6. In deciding to attend MIPTV 2007, 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=53



Sales/Pre-Sales

- Forty-seven companies indicated that they either completed sales while at MIPTV or began discussions that are likely to lead to sales while there.
- Twenty-three companies indicated that they either completed pre-sales while at MIPTV or began discussions that are likely to lead to pre-sales.
- Of these, 21 companies provided information on 136 deals involving 87 titles.
- Companies reported that 27 distribution agreements were signed.
- Respondents reported that \$2,641,440 of sales were completed while at MIPTV 2007 and that \$9,003,435 worth of sales are likely to occur as a result of discussions initiated at the market.
- Companies reported that \$950,000 of pre-sales were completed at MIPTV, and expect \$2,494,500 of pre-sales to occur as a result of discussions initiated at the market.

Breakdown of Sales and Pre-Sales Deals

Sales

19 Companies

79 Titles

109 Deals

\$2,641,440 Sales completed while at MIPTV 2007

\$9,003,435 Sales likely to occur as a result of discussions completed while at MIPTV 2007

Pre-Sales

5 Companies

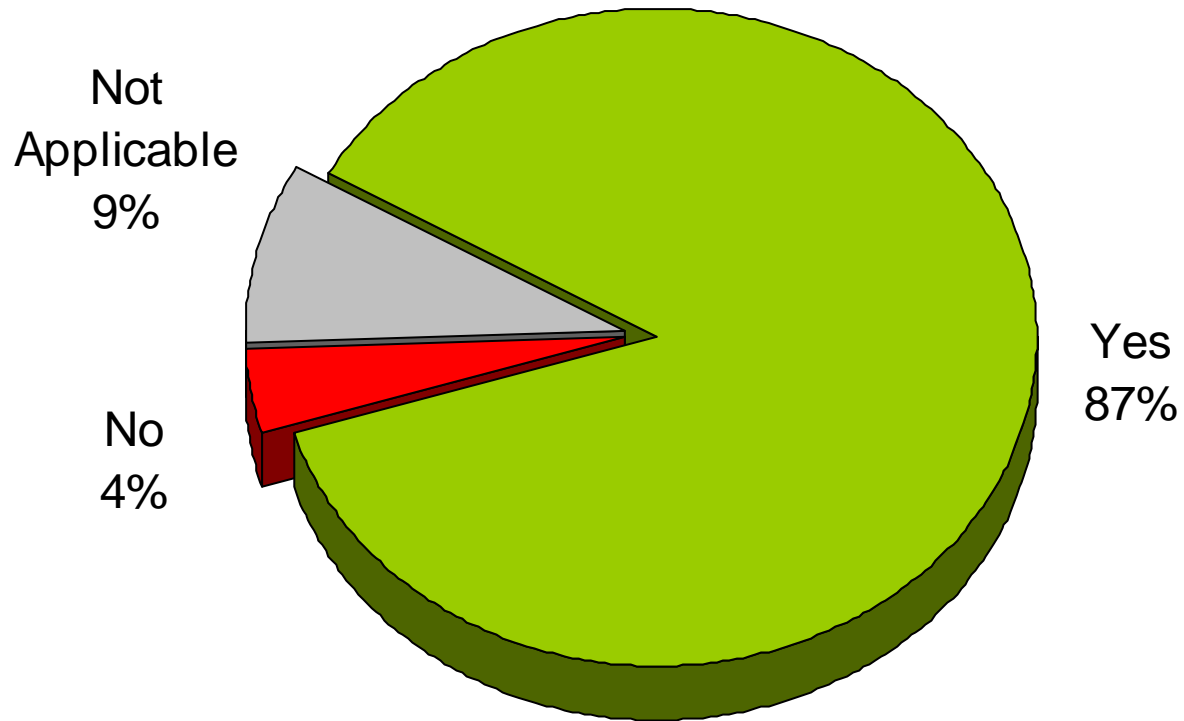
10 Titles

27 Deals

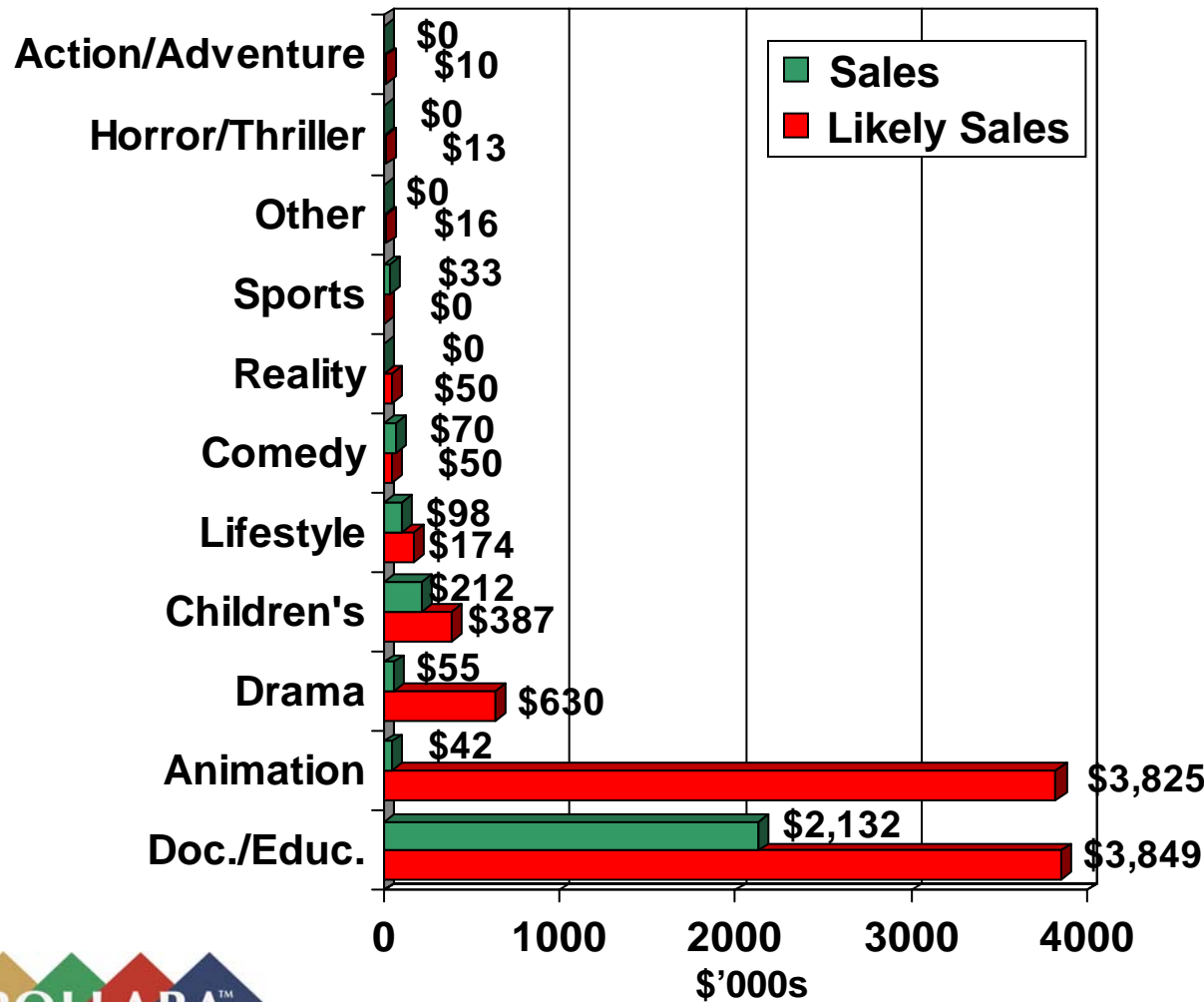
\$950,000 Pre-Sales completed while at MIPTV 2007

\$2,494,500 Pre-Sales likely to occur as a result of discussions completed while at MIPTV 2007

Sales

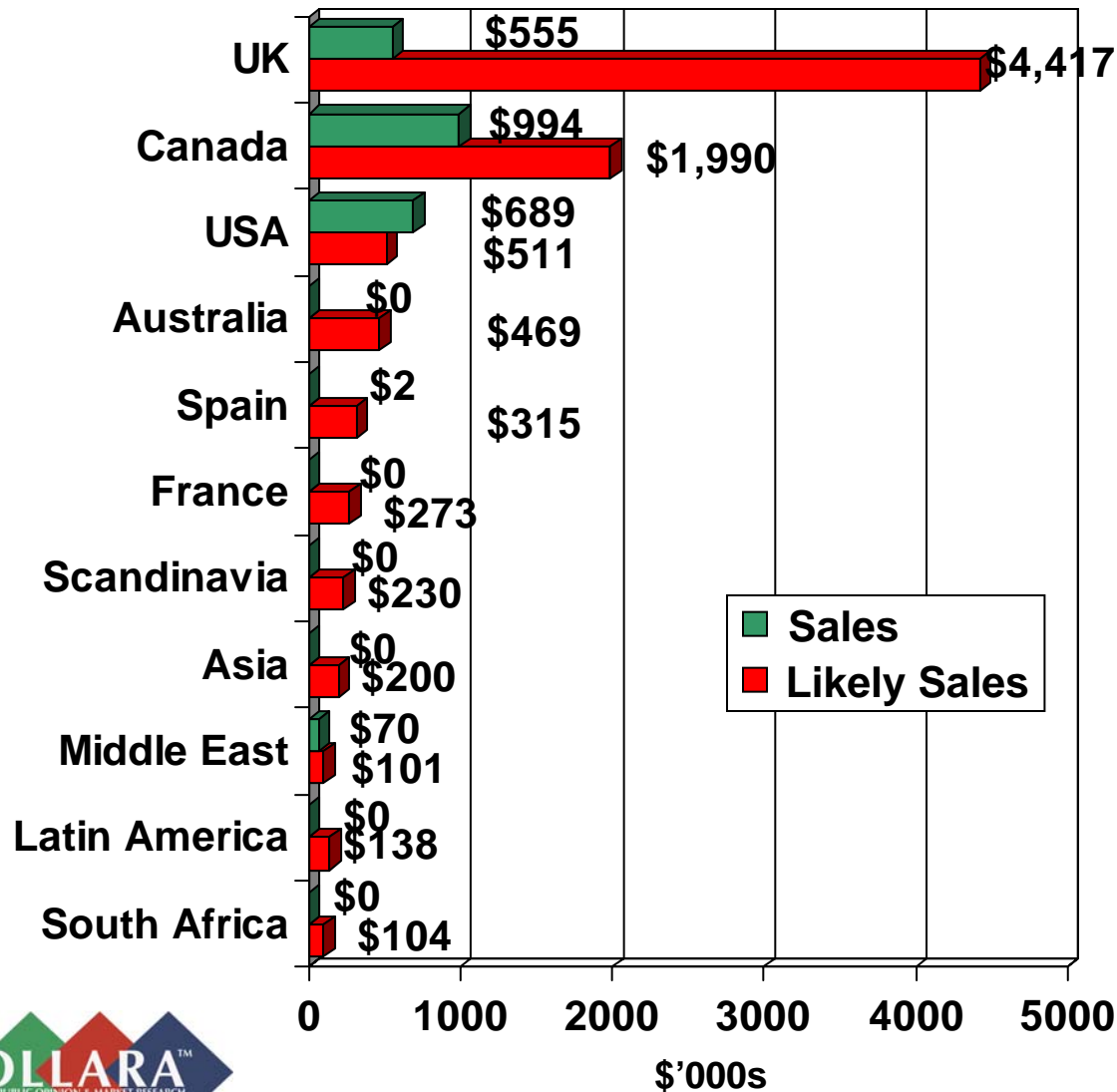


Breakdown of Sales and Likely Sales by Genre



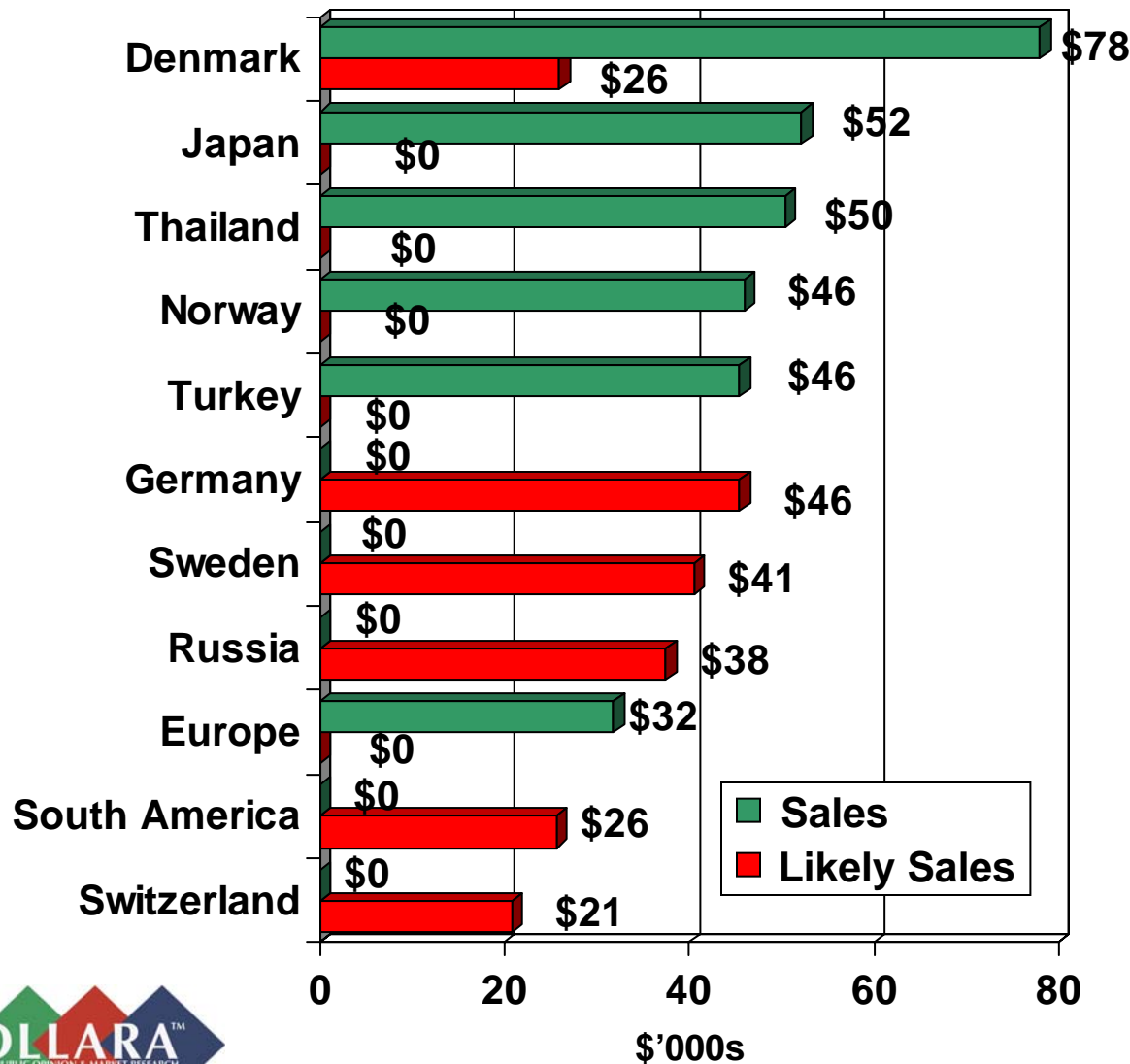
Companies	Titles	Deals
1	2	2
1	2	2
1	2	2
2	2	2
1	1	1
2	2	2
5	7	9
5	7	14
3	4	5
5	14	20
12	36	50

Breakdown of Sales & Likely Sales by Country



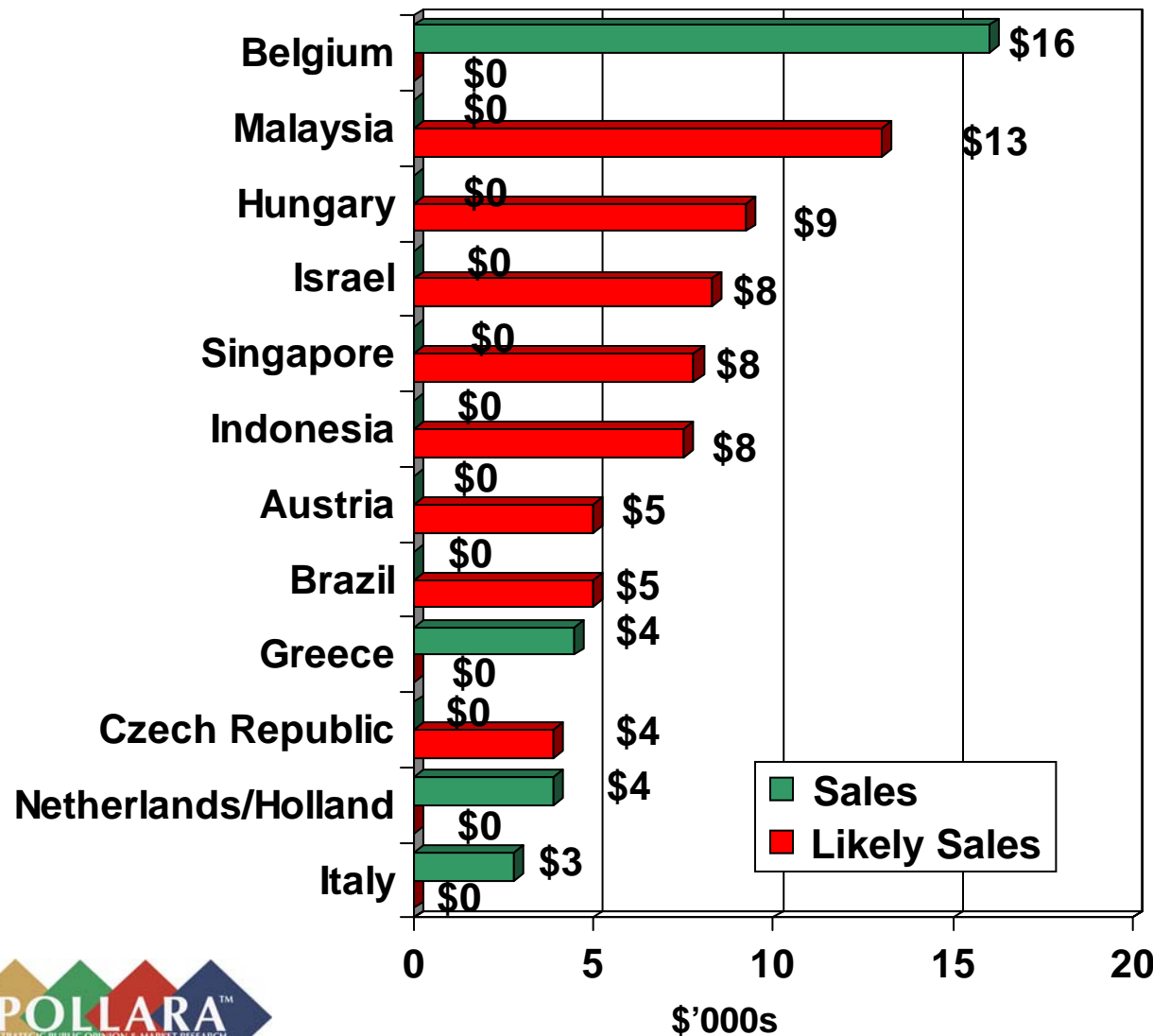
Companies	Titles	Deals
8	13	14
6	8	8
8	15	18
5	5	5
3	4	4
1	1	1
1	2	2
1	1	1
3	6	8
1	1	1
2	5	5

Breakdown of Sales & Likely Sales by Country (cont'd)



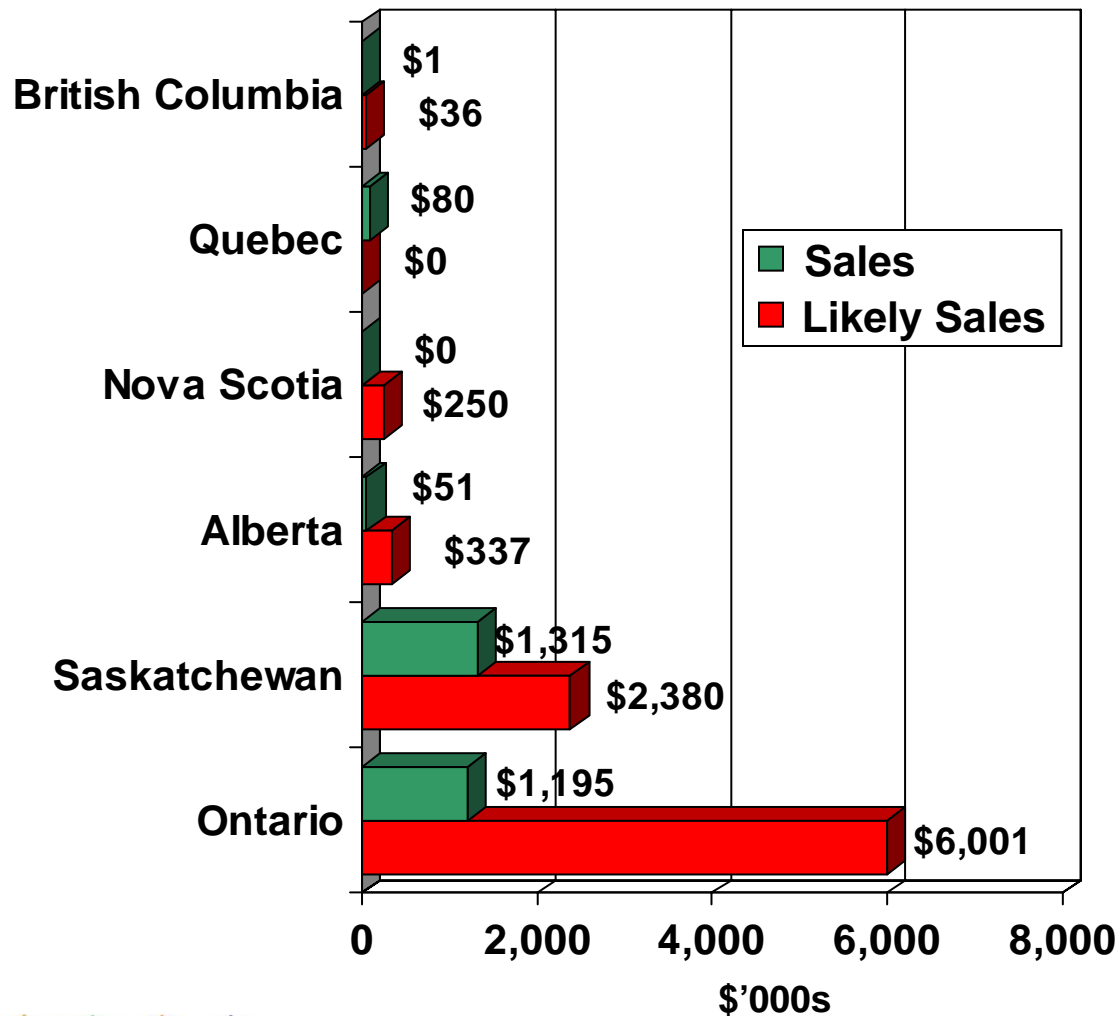
Companies	Titles	Deals
2	2	2
2	2	2
1	1	1
1	1	1
1	2	2
1	1	1
1	2	2
2	6	6
1	1	1
1	2	2
1	1	1

Breakdown of Sales & Likely Sales by Country (cont'd)



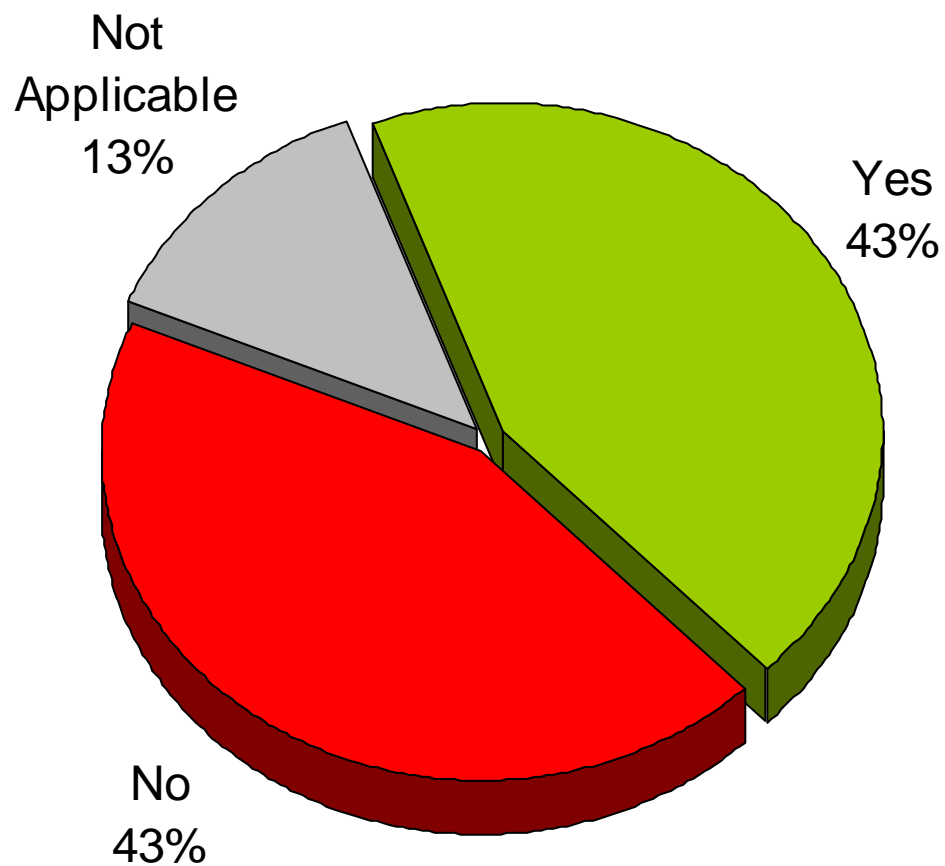
Companies	Titles	Deals
1	1	1
1	1	1
1	6	6
2	3	3
1	1	1
1	1	1
1	1	1
1	1	1
1	1	1
1	2	2
2	2	2
1	1	1

Breakdown of Sales and Likely Sales by Company Region

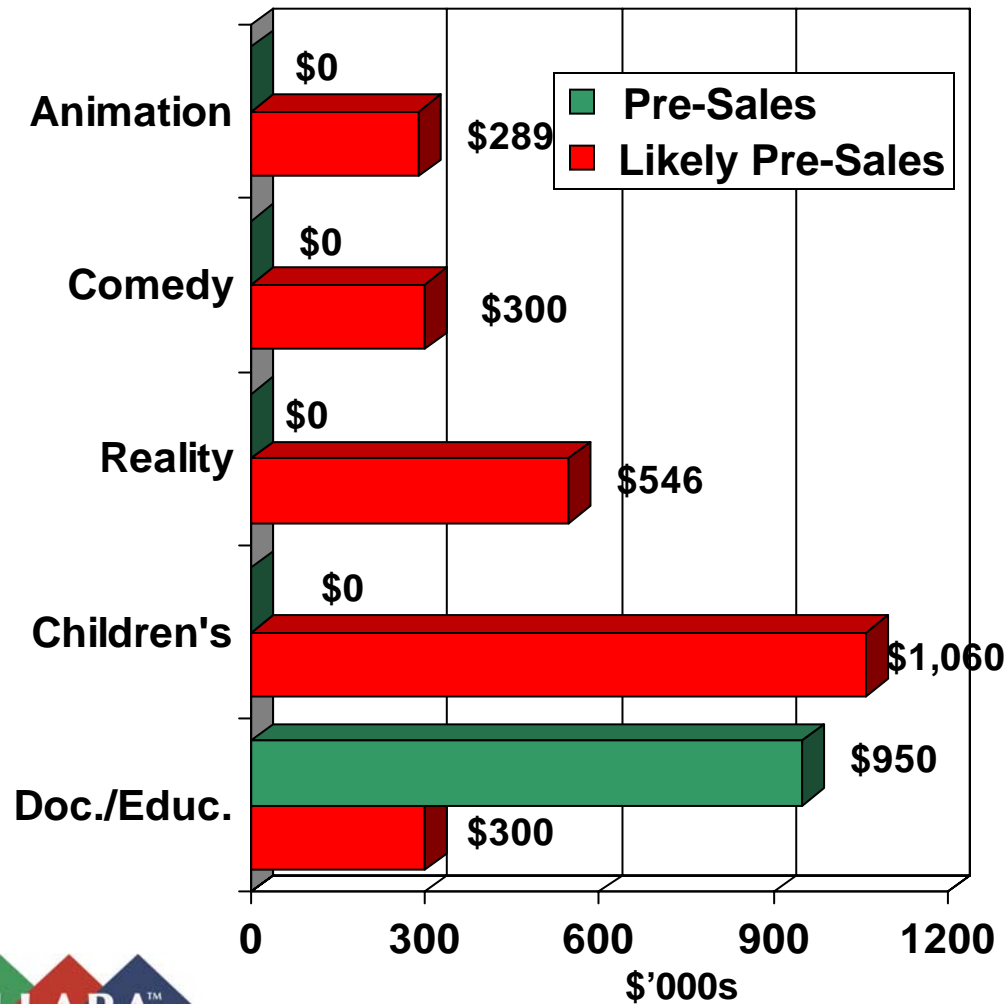


Companies	Titles	Deals
2	6	7
1	1	1
1	3	3
2	3	4
2	7	11
11	59	83

Pre-Sales

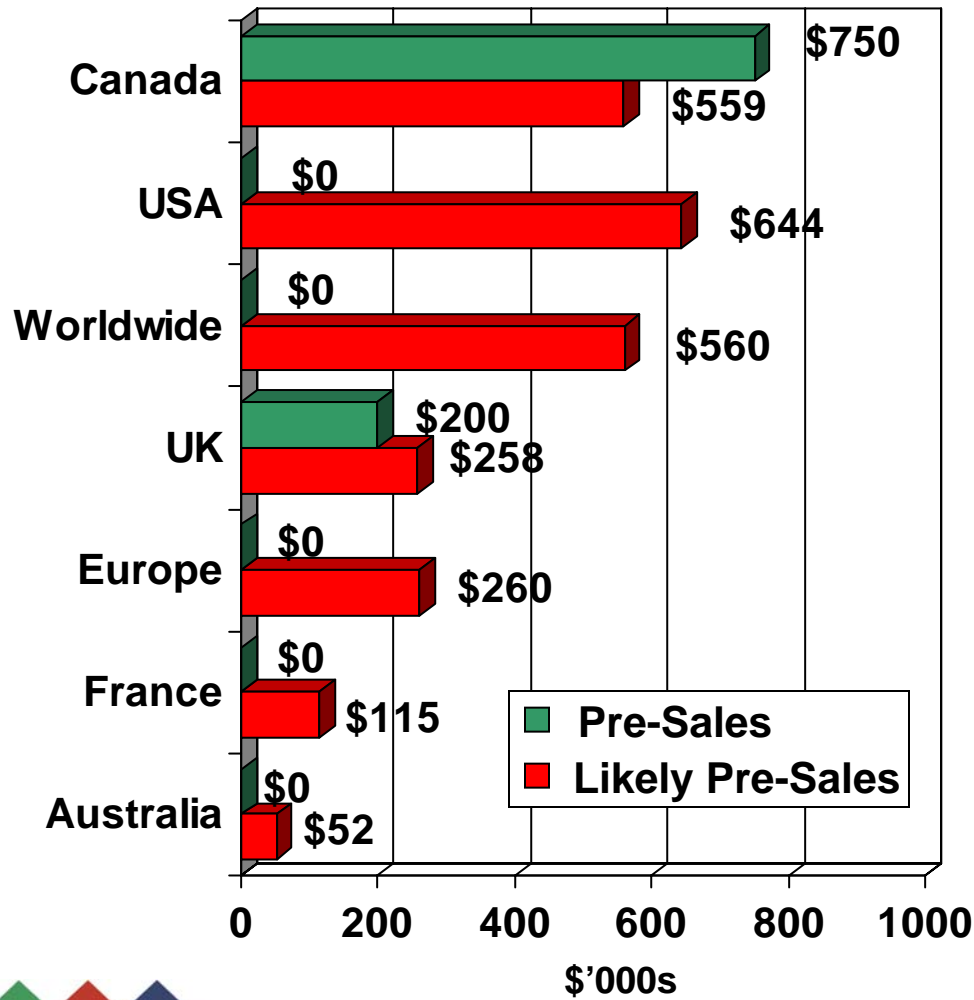


Breakdown of Pre-Sales and Likely Pre-Sales by Genre



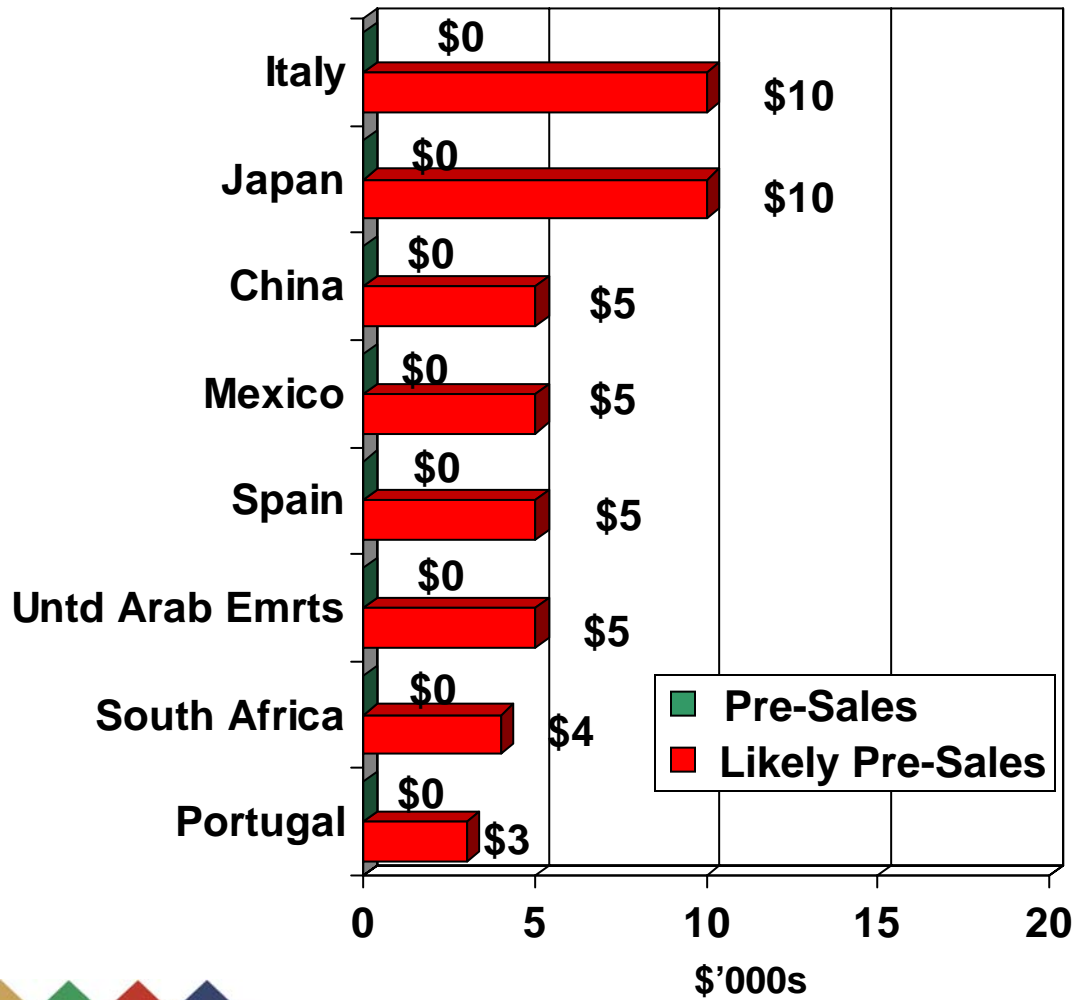
Companies	Titles	Deals
3	4	15
1	1	1
1	1	3
2	2	6
1	2	2

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



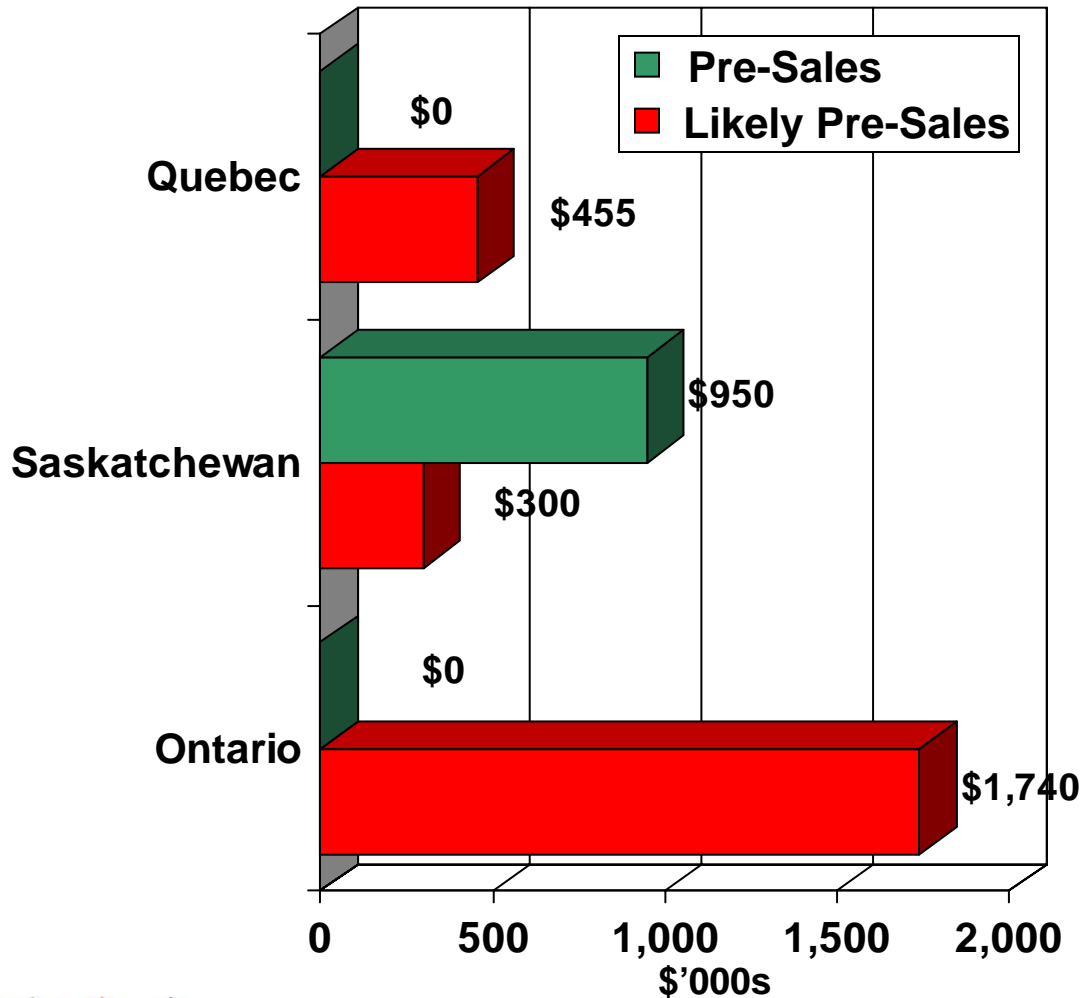
Companies	Titles	Deals
3	3	3
1	4	6
1	1	2
3	4	4
1	1	1
2	2	2
1	1	1

Breakdown of Pre-Sales and Likely Pre-Sales by Country (cont'd)



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

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



Companies	Titles	Deals
2	3	11
1	2	2
2	5	14

Co-Production and Co-Venture Deals

- 13 companies (25% of those who answered the question) indicated that they either signed, or began negotiating co-production or co-venture deals while at MIPTV 2007.
- 11 of these companies answered all subsequent questions concerning the number of deals, the value of deals, and the countries with which these deals were made.
- 12 companies provided information about the number of co-production or co-venture deals - and reported a total of 25 deals.
- 11 companies provided information about the value of co-production or co-venture deals - and reported that the deals were worth \$23,220,000.
- All 13 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 MIPTV 2007.

Co-Production and Co-Venture Deals

Respon- dent	Number of co- production or co- venture deals	Estimated value of deals to company	Q9d - Countries involved
1	2	\$7,000,000	United Kingdom
2	5	\$6,000,000	France
3	4	\$3,000,000	Australia, Germany, Monaco, Singapore
4	2	\$2,000,000	Germany
5	3	\$1,800,000	United Kingdom
6	2	\$1,500,000	Australia
7	1	\$650,000	United States
8	2	\$500,000	United States
9	1	\$420,000	United States
10	1	\$250,000	South Africa
11	1	\$100,000	United Kingdom
12	0	\$-	United States
13	1	\$-	France

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
Ontario	7	7	\$8,420,000
Quebec	1	5	\$6,000,000
British Columbia	2	6	\$4,500,000
Alberta	2	5	\$2,300,000
Saskatchewan	1	2	\$2,000,000

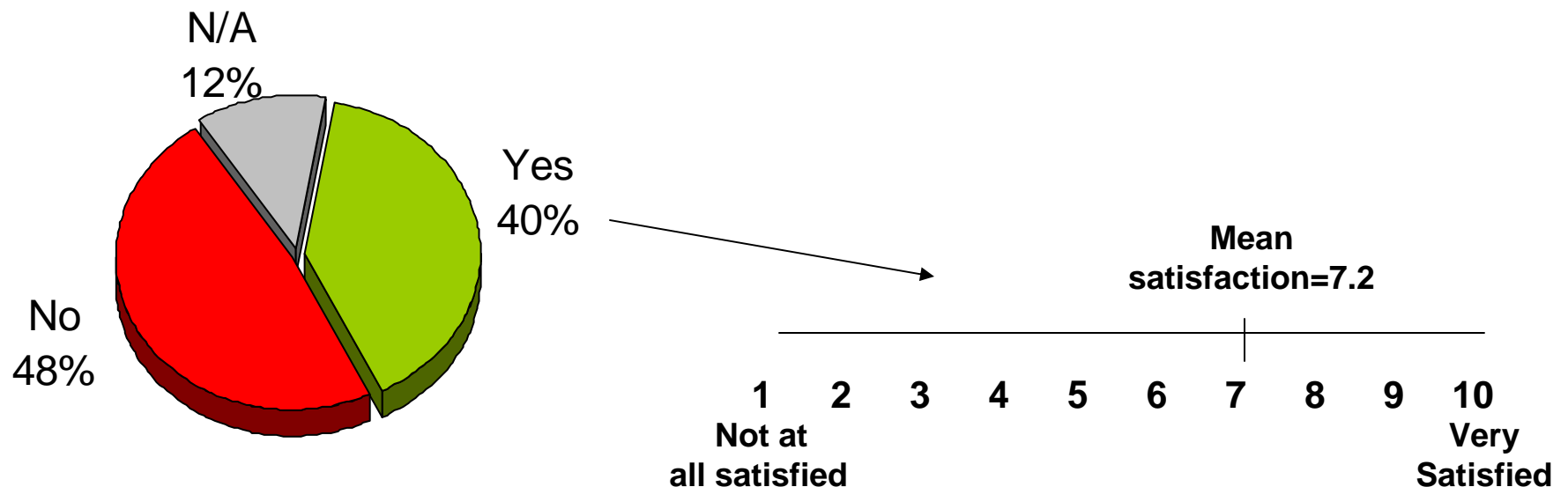
Q9b. How many co-production or co-venture deals were either signed or will likely be signed in the future as a result of discussions initiated at MIPTV 2007?

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



Title Screening

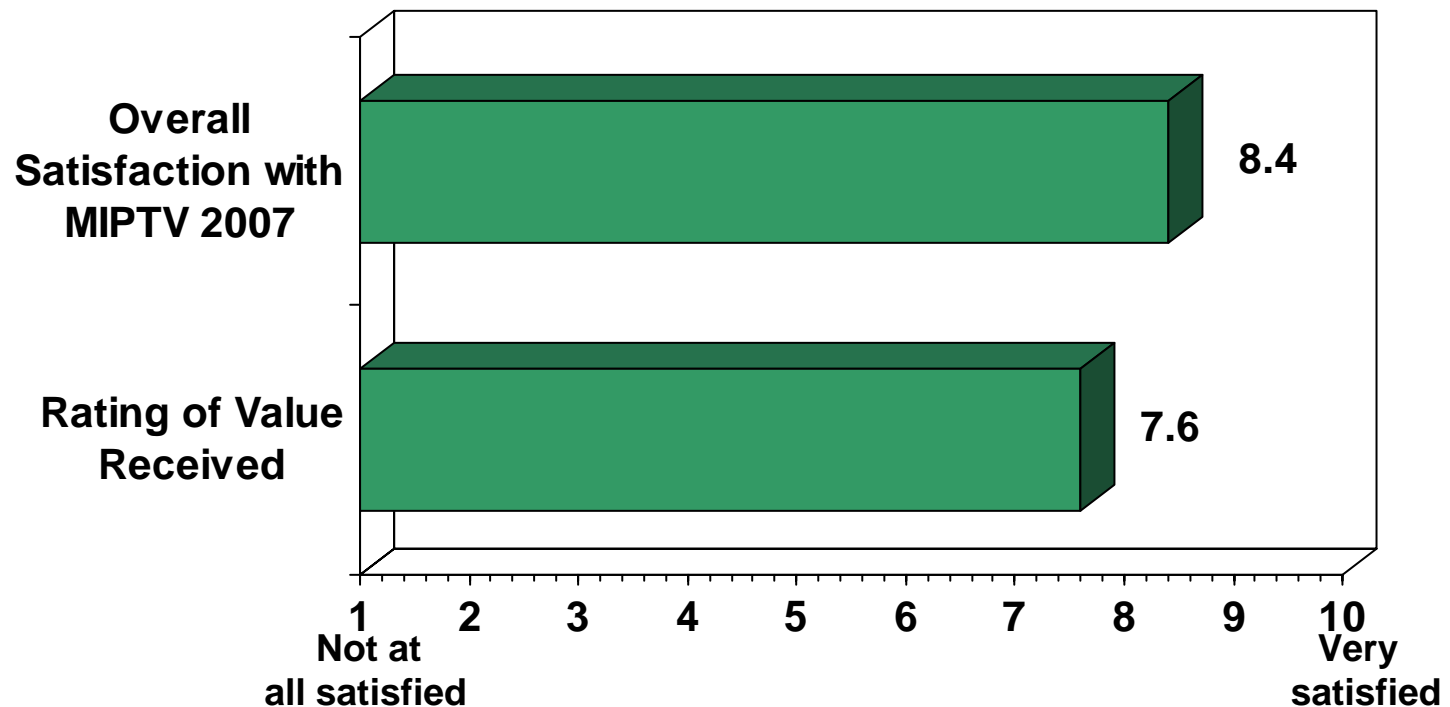
- 21 respondents (40%) indicated that they had a title screened at MIPTV 2007.
- These respondents gave an average satisfaction score of 7.2 for the visibility their titles received from the screenings.



Q11. Were any of your titles screened at MIPTV 2007? (n=52)

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=21)

Overall Satisfaction With, and Value of, MIPTV 2007



Q13a. How satisfied would you say you were overall with MIPTV 2007 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 MIPTV 2007, how would you rate the VALUE you received on the same 1-10 scale...?

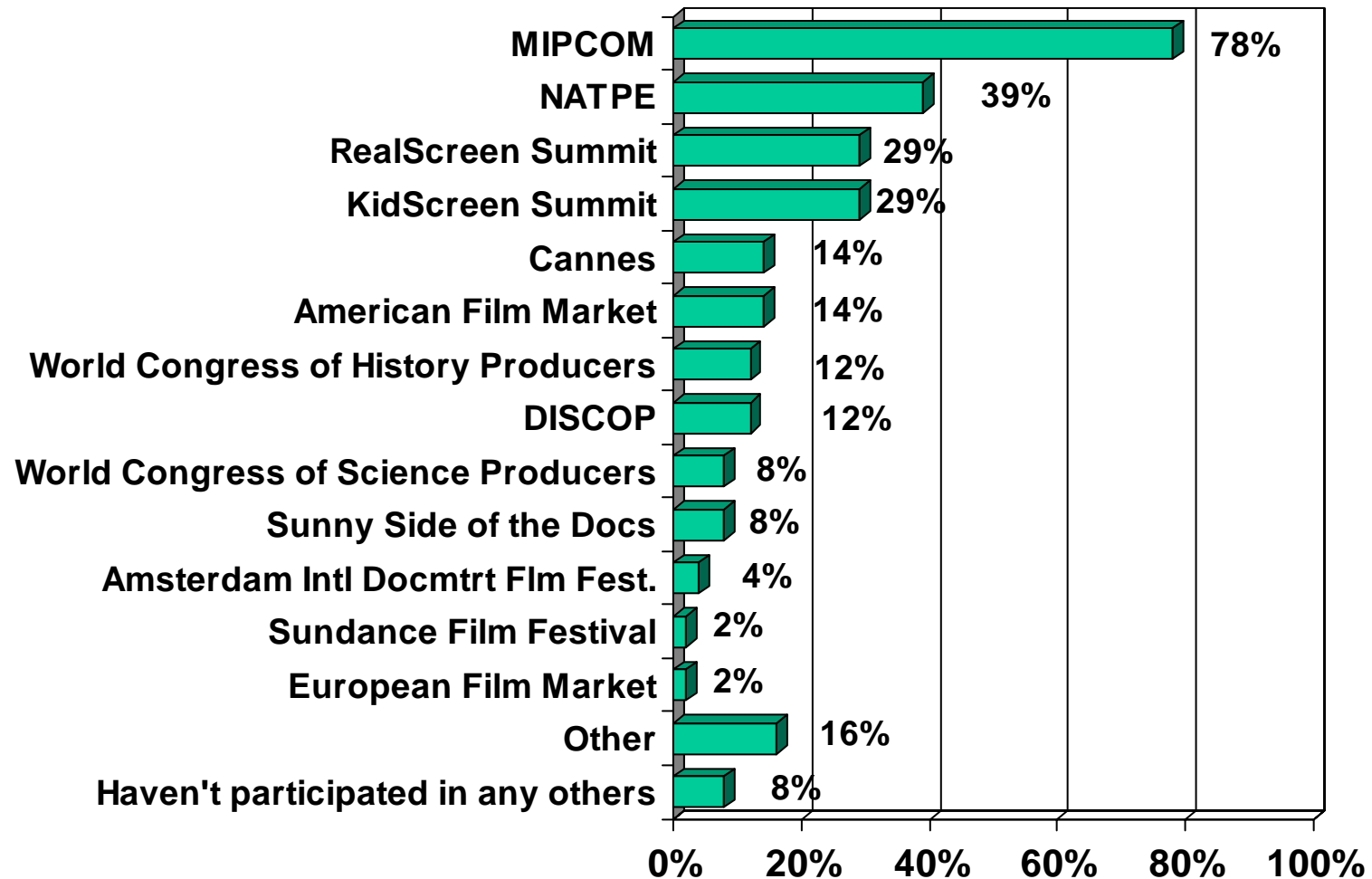
N=51

Satisfaction with MIPTV 2007



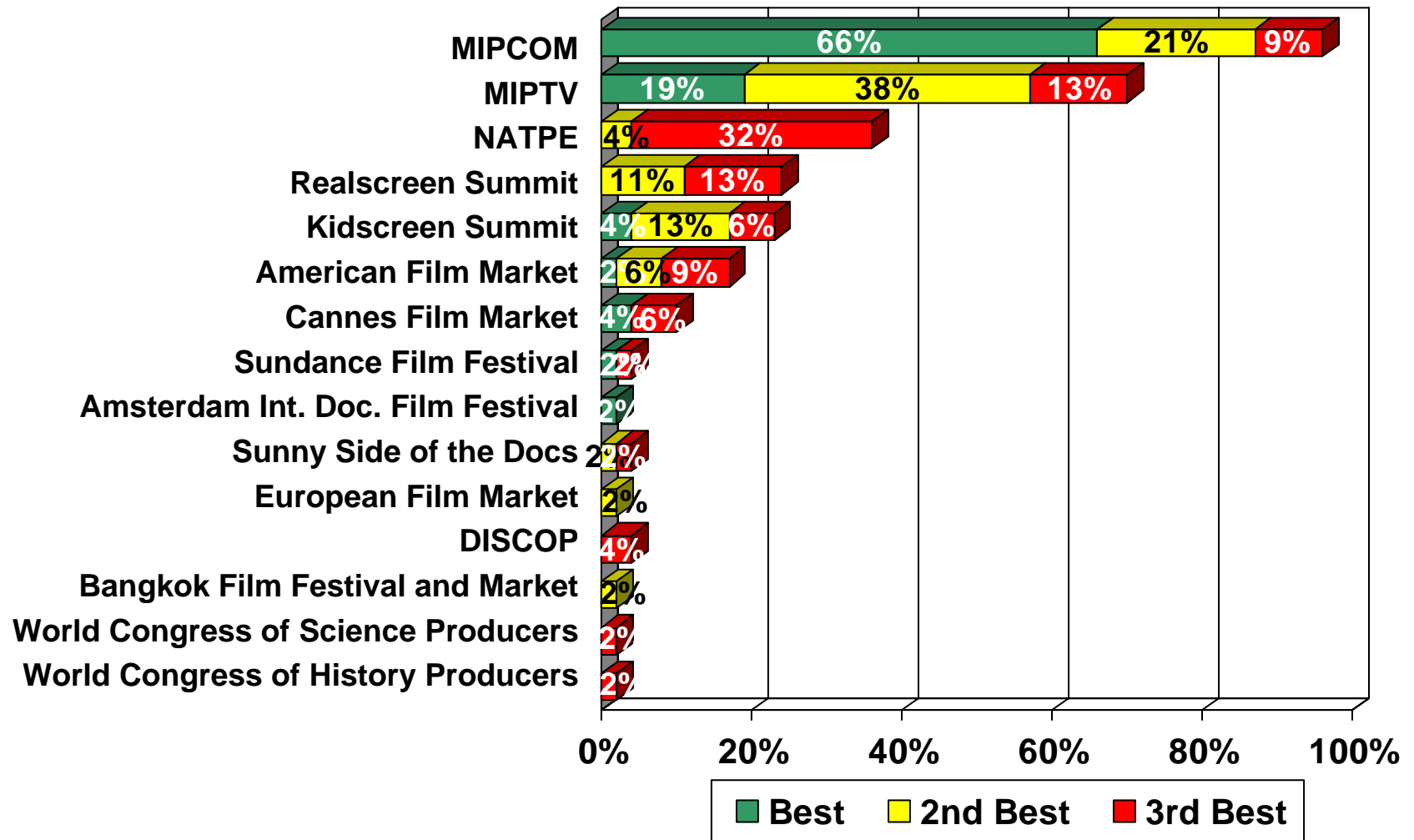
Q13c. How satisfied were you with MIPTV 2007 in terms of meeting the following objectives for attending, using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied? If a particular item does not apply, select, "not applicable". N=51

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*
N=51

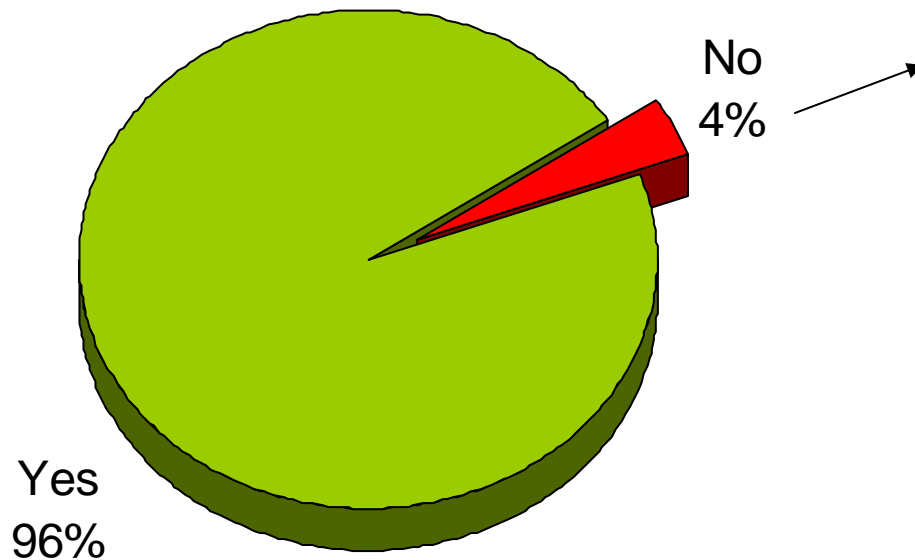
Rating of International Festivals & Markets



Q15 Thinking of MIPTV 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=47

Used Services of Canada Pavilion?

Used Canada Pavilion?



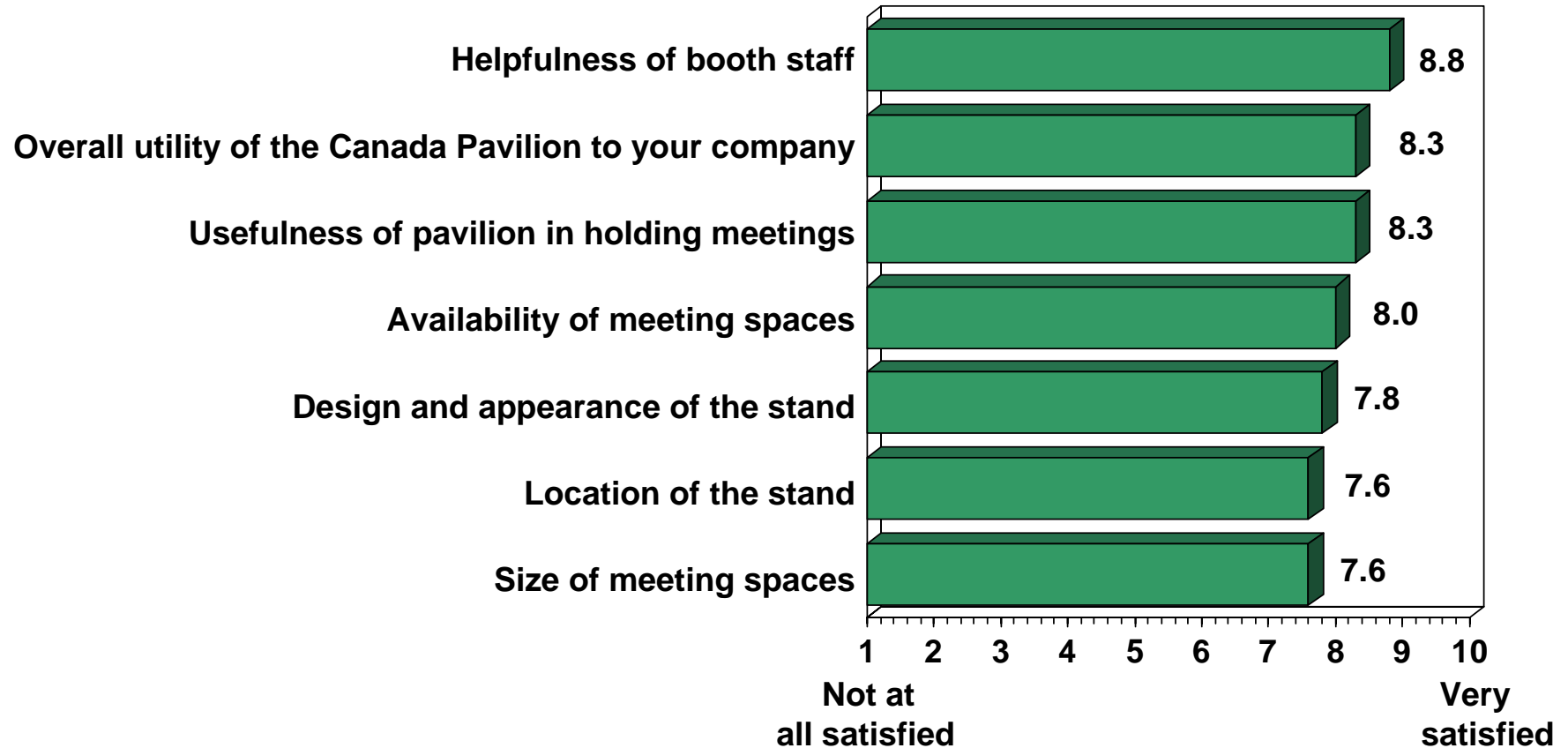
Why Not?

- *"We have access to a better stand."*

Q17 Did you use the services provided by the Canada Pavilion at MIPTV 2007? N=51

Q18 (IF "NO" TO Q17) Why didn't you use the services provided at the Canada Pavilion? N=2

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 MIPTV 2007 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=49

Suggestions for Future Improvements to the Canada Pavilion*

- A number of respondents felt that the Canada Pavilion had become too spread out, and that confusion arose because of the way the area was divided.
 - *“The Canadian Pavilion has become too spread out.”*
 - *“The split of areas is a bit confusing when trying to meet with clients. It would be better if there could be one larger area with one reception area.”*
 - *“We had the two tables on different sides of the aisle and many of our buyers were confused when coming to meet us.”*
- Others said that the design of the Pavilion needs to be updated.
 - *“Let's update the look of the stand - modern, colourful, cool looking.”*
 - *“A sexier, more innovative feel.”*
 - *“More nicely appointed.”*

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=49

**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 suggested changing the location of the Pavilion.
 - *“Perhaps a better location.”*
 - *“It would be great to be in a location where there is actual light - like the Lehrins Hall addition or if there was another building added.”*
 - *“Different floor”*
- Others wanted more meeting space.
 - *“It would be nice to have the little VIP room back. This year, the room that used to have a couple of couches to use in between meetings was packed with suitcases and packages with no place to go at all.”*
 - *“More private meeting space. It was noisy and cramped.”*

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=49

**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 the Pavilion should host a reception.
 - *“The Canada Pavilion should host a reception at the stand, like the Aussies, UK Independents and US Independents did.”*
 - *“A cocktail reception that buyers / potential co-producers could be invited to would be helpful in building relationships.”*
 - *“Include a fully licensed bar.”*
- A couple were concerned about the price charged.
 - *“Please do not increase price for the booth. It is getting ever so expensive.”*
 - *“The less you charge, the better it is for us!”*

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=49

**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*

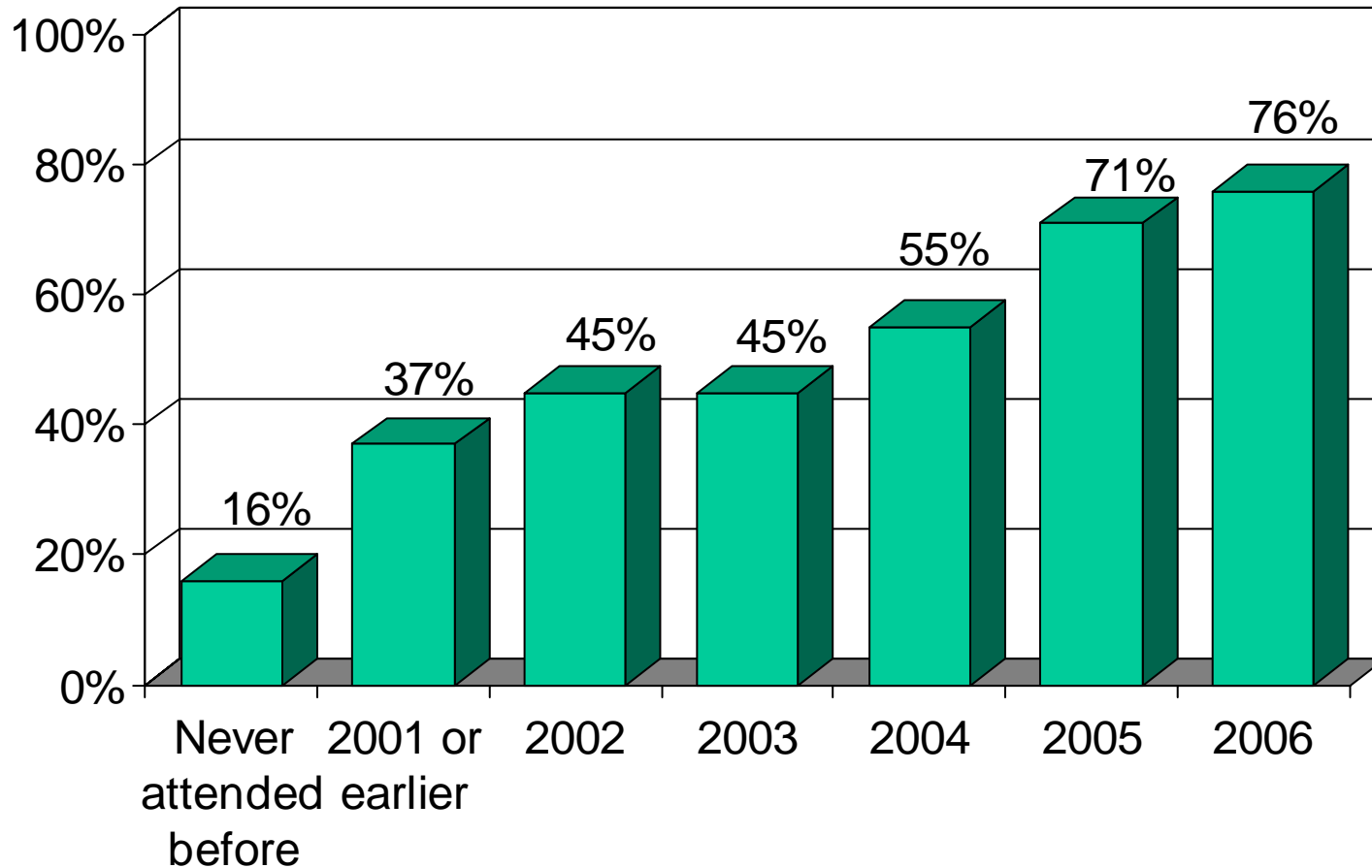
- A few respondents had problems relating to posters.
 - *“Better lighting on posters - hit them properly to not create shadows across the top due to light placement.”*
 - *“En arrivant la bas, l'equipe de TFC m'a informé que ce n'était pas possible pour les participants du NSI d'afficher leur posters. Nous étions decus, car nous avons payé comme tous les autres participants.”*
- A couple of others commented about technical difficulties.
 - *“Desperately need access to fax machine, long distance telephones and printers.”*
 - *“Stronger Internet signal - kept losing signal.”*

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=49

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



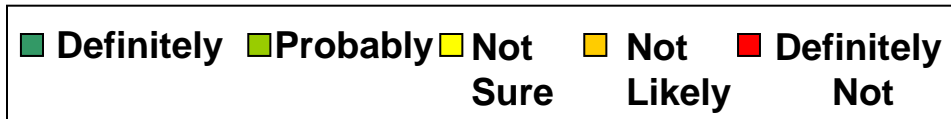
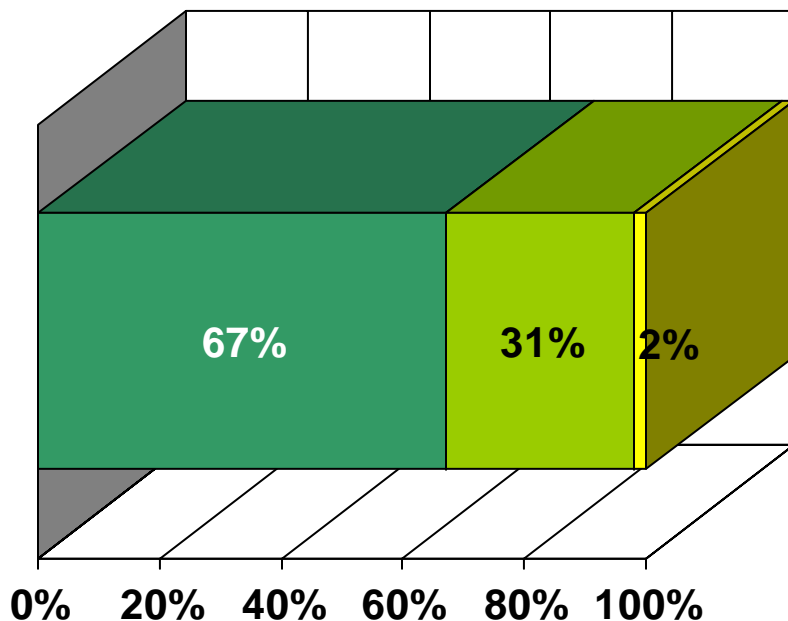
Past Attendance at MIPTV



Q21. Which previous MIPTV events, if any, has your company attended?
Select all that apply
N=51



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



- *“It the best platform for building relationships in the international marketplace.”*
- *“Broadcasters and distributors/producers come together from around the world; great opportunity for business.”*
- *“I think that MIPTV is a great opportunity to expand my company's international contacts and sales.”*
- *“Great contact and business development venue. A “must attend” for both emerging and established companies.”*

Q22a. Would you recommend MIPTV to other companies in the Canadian audio-visual industry? N=51

Q22b. Please explain your answer. N=50

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

Reasons for Recommending MIPTV to Others*

- *“If you set up meetings in advance, MIPTV can give access to that huge international market to help bridge the inherent financial gaps. These international markets really get you thinking about the appetites of the international community and formats.”*
- *“Fantastic opportunity to initiate new business opportunities, partnerships, relationships and educate yourself about industry trends.”*
- *“I think it is important that Canadian producers get out to the international marketplace and learn about the products out there.”*
- *“Provides excellent exposure to international broadcast market.”*
- *“MIPTV is a great television sales market!”*



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

Cost of Attending MIPTV 2007

- The median cost incurred by companies attending MIPTV was \$10,000. The mean cost was \$14,309
- 22% of respondents (11 companies) indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend the event.
- Five companies reported receiving federal funding ranging in amount from \$1,000 to \$3,500. The median amount was \$2,000.
- Four companies indicated that they had received provincial funding ranging in amount from \$2,000 to \$3,500. The median amount was \$2,500.

Other Comments*

- *“Once again the Telefilm staff went beyond their call of duty to provide a professional environment for both distributors and buyers. Thank you very much to all the Telefilm personnel.”*
- *“Telefilm needs to find a way to reduce the costs of our exhibiting at MIPTV.”*
- *“Please provide long distance telephone, computer printers and fax access. Need better signage for locating booth number. Several buyers could not find us.”*
- *“Screening rooms would be great.”*
- *“Better brochures.”*

Q26. Finally, please provide any other comments you have regarding MIPTV 2007 or suggestions for improving the support provided by Telefilm and its partners.
N=51

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





Conclusions

Conclusions

- Overall, participants were very satisfied with MIPTV, giving an overall satisfaction score of 8.4 out of 10. This is consistent with last year's score of 8.2.
- Also consistent with last year, respondents were marginally less satisfied with MIPTV in terms of the value they received, giving an average rating of 7.6.
- Respondents indicated that MIPCOM is the best international event held outside of Canada at meeting their needs, with MIPTV coming in second place.
- Participants were most satisfied with MIPTV 2007 in terms of reconnecting with existing business contacts (8.7 out of 10), making new business contacts (8.0) and learning about international markets and trends (8.0).
- They were least satisfied with it in terms of attracting visibility or press coverage for their companies (6.8 out of 10).

Conclusions

- It appears that participants at MIPTV enjoyed a successful market.
 - Nearly nine-in-ten (87%) either completed sales, or began discussions that are likely to lead to sales.
 - Forty-three percent either completed pre-sales, or began discussions that are likely to lead to pre-sales.
 - A quarter of companies either signed, or began negotiating co-production or co-venture deals.
 - Companies reported over \$3.5 million of actual sales and pre-sales, and nearly \$11.5 million of likely sales and pre-sales, in addition to more than \$23 million of co-production or co-venture deals.
 - Since not all companies who said they had completed sales or pre-sales provided details of the transactions, it is likely that these numbers underestimate the true value of sales and pre-sales at MIPTV.

Conclusions

- Almost all respondents (96%) used the services of the Canada Pavilion at MIPTV.
- They were very satisfied with the overall utility of the Canada Pavilion (rating their satisfaction as 8.3 out of 10). This score is marginally lower than last year's score of 8.6.
- Because of the small base sizes, annual variations in scores should be treated with caution. However, it should be noted that the greatest differences in scores related to:
 - The design and appearance of the stand (8.4 in 2006, vs. 7.8 in 2007)
 - The location of the stand (8.2 in 2006 vs. 7.6 in 2007)
- Respondents' comments and suggestions concerning future improvements to the Pavilion reinforce the fact that the location, layout and design of the stand are areas that should be addressed.



**101 Yorkville Avenue
Toronto, Ontario M5R 1C1
Tel: 416.921.0090 / Toll Free: 1.888.POLLARA
www.pollara.com**