

**CANNES 2008  
Outcomes Report**

**Conducted by:**

**POLLARA** 

**For:  
Telefilm Canada**

**October 2008**

# **Methodology**

# Methodology

- A total of 80 e-mail invitations were sent to Canadian companies that attended Cannes Film Market 2008.
- 52 of the 80 companies clicked on the link in the e-mail invitations to go to the survey site.
- Of these 52, 52 completed all of the survey – a 100% open link and complete response rate.
- The overall response rate was 65%.
- The survey was open from July 2<sup>nd</sup> until October 10<sup>th</sup>, 2008.
- During the course of the survey, both Telefilm and POLLARA made attempts to follow up with non-responding companies through e-mail and telephone calls to encourage them to participate.

# Methodology

E-mail invitations sent to 80 companies



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



52 companies reached the  
end of the survey

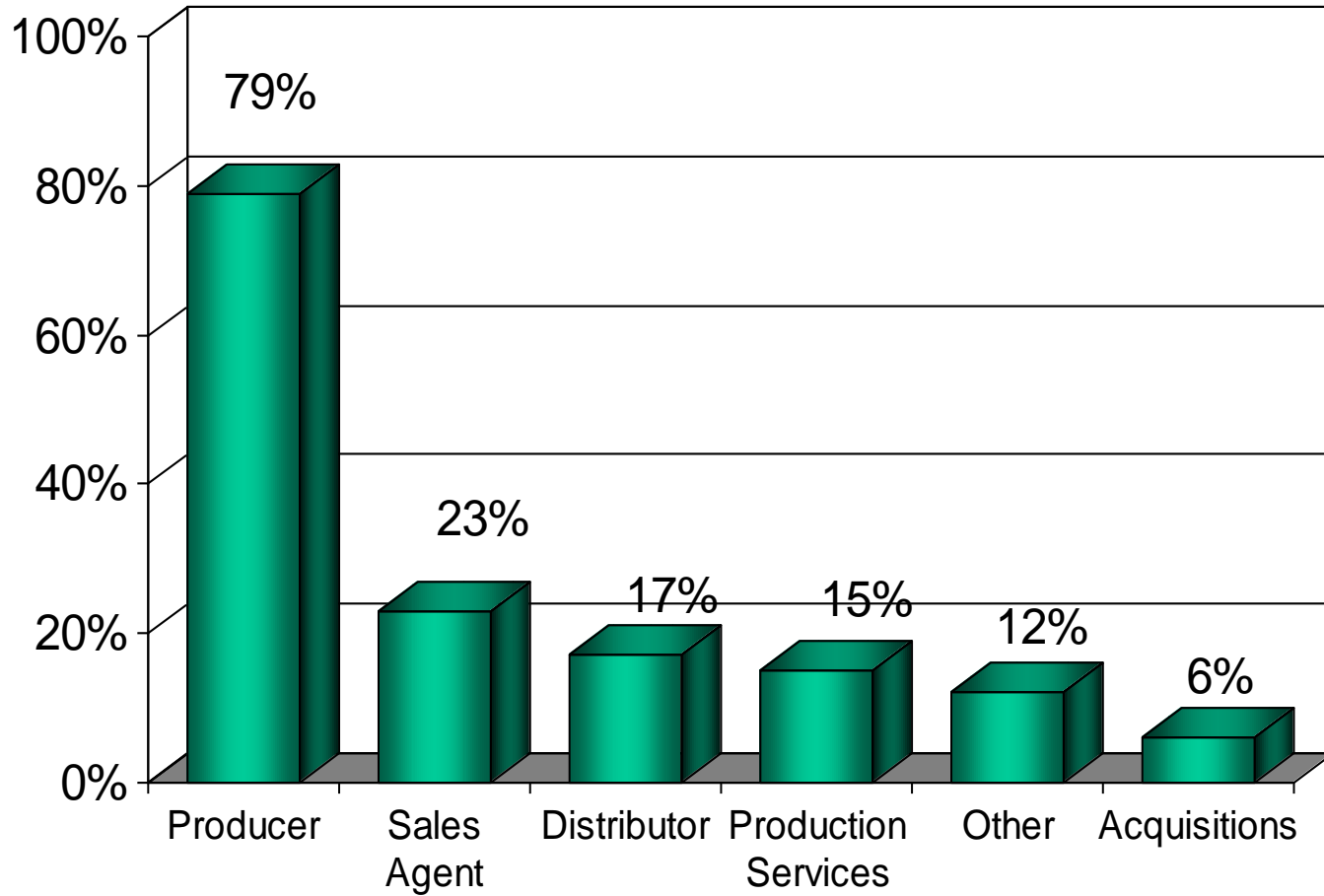
# Sample and Respondents by Province

- Broken down by province, the sample (companies) was distributed across the following locations.

Province	Number of companies in sample	Number of companies starting survey	Number of companies completing survey
Quebec	21	15	15
Ontario	27	17	17
British Columbia	18	12	12
Alberta	1	1	1
Manitoba	3	2	2
New Brunswick	2	1	1
Nova Scotia	1	1	1
Newfoundland & Labrador	6	2	2
Saskatchewan	1	1	1
<b>Total</b>	<b>80</b>	<b>52</b>	<b>52</b>

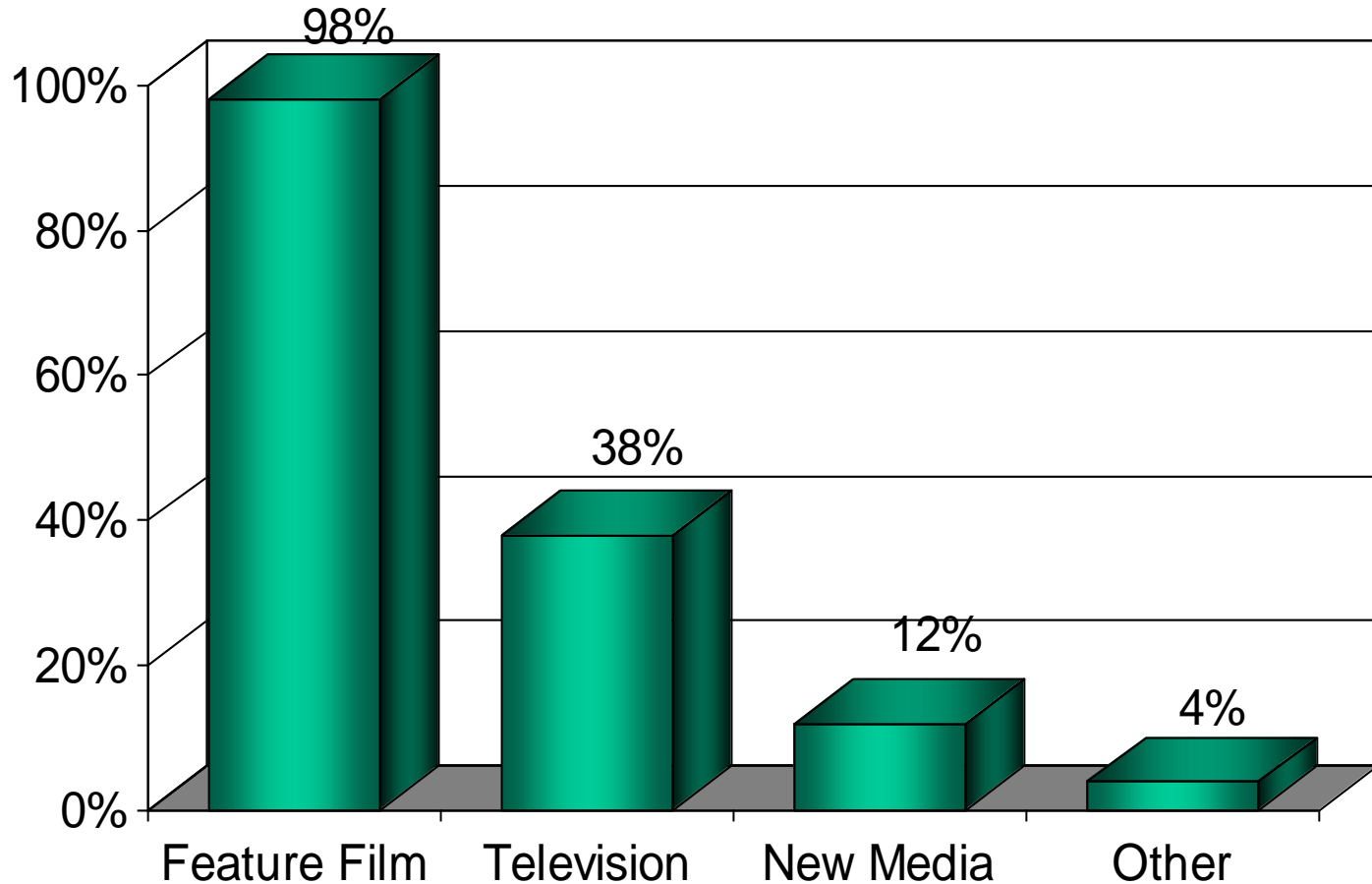
# **Respondent Profile**

# Primary Business Focus of Company



Q1. What is the primary business focus of your company? *Select all that apply.*  
N=52

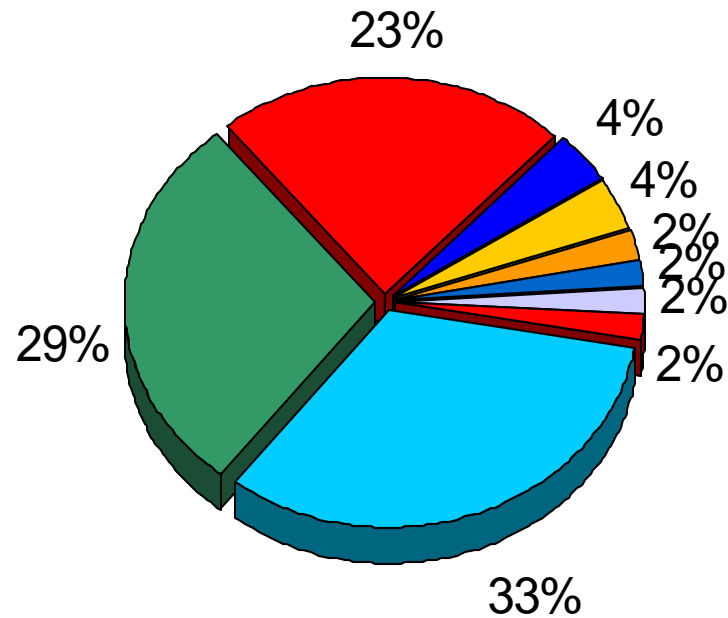
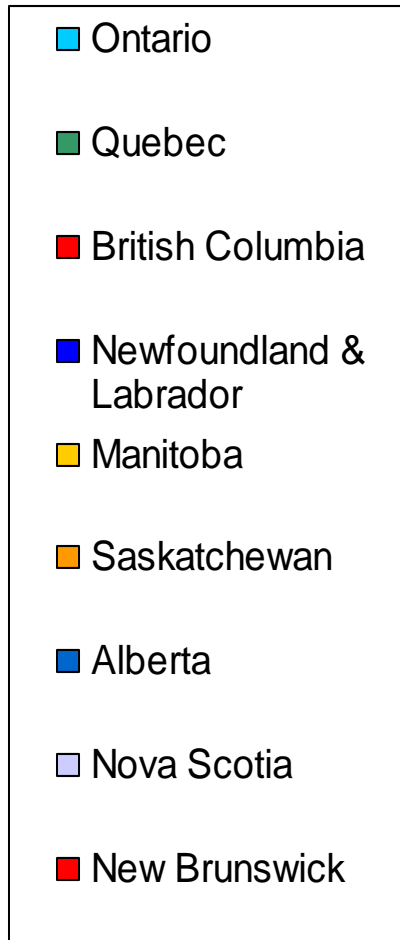
# Main Format(s) of Interest



Q2. What is the main format(s) of interest to your company? *Select all that apply.*  
N=52

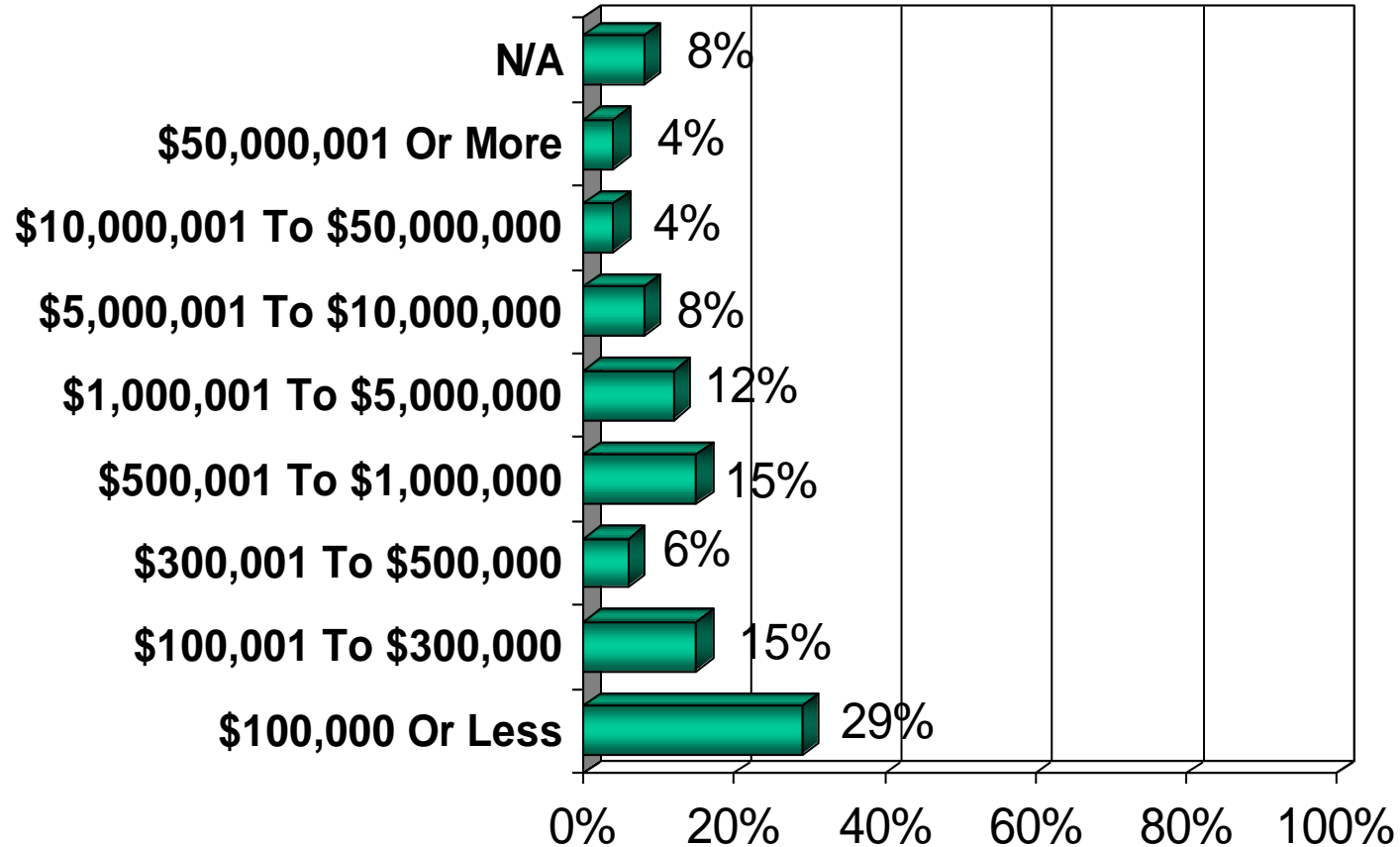


# Location of Head Office



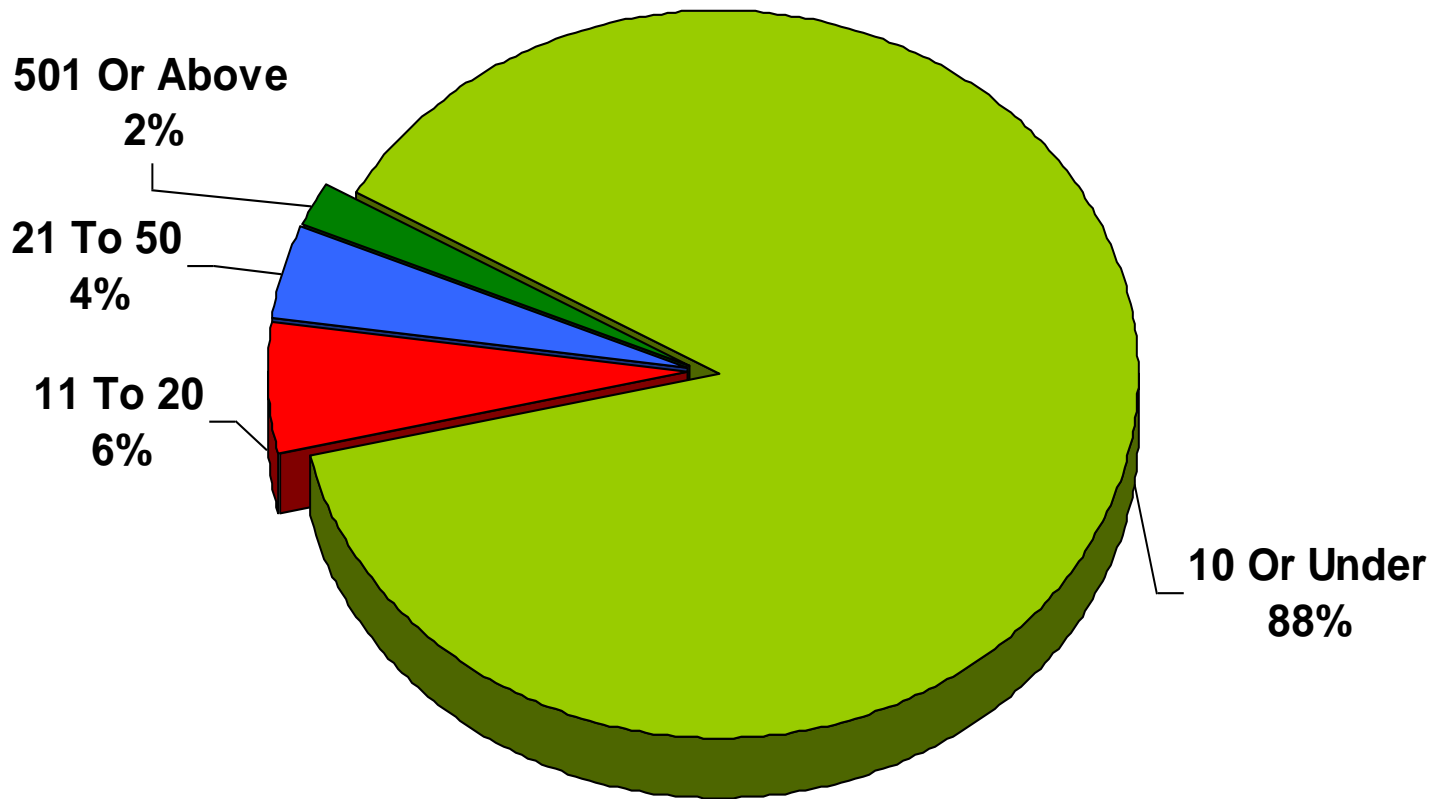
Q3. In which province/territory is your head office located? N=52

# Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?  
N=52

# Number of Employees



Q5. How many full-time employees are there currently in your company?  
N=52

# **The Film Market**

# Genres and Formats Companies were interested in Selling and/or Pre-Selling at CANNES 2008

	Genre (Q6)	Feature Film	Television	New Media
Drama	81%	81%	13%	0%
Horror/Thriller	27%	27%	6%	0%
Comedy	44%	44%	8%	0%
Action/Adventure	25%	25%	6%	2%
Documentary/Educational	31%	29%	21%	2%
Animation	12%	10%	10%	2%
Public Affairs	6%	0%	6%	0%
Children's Programming	10%	8%	6%	2%
Romantic	21%	21%	2%	0%
Science Fiction	13%	13%	2%	0%
Sports	2%	2%	2%	2%
Lifestyle	4%	2%	4%	0%
Erotica	4%	4%	2%	0%
Performing Arts	4%	0%	4%	0%
Other	12%	10%	6%	2%

Q6. In deciding to attend the Cannes 2008 Filmart, which of the following programming genres was your company interested in selling and/or pre-selling?

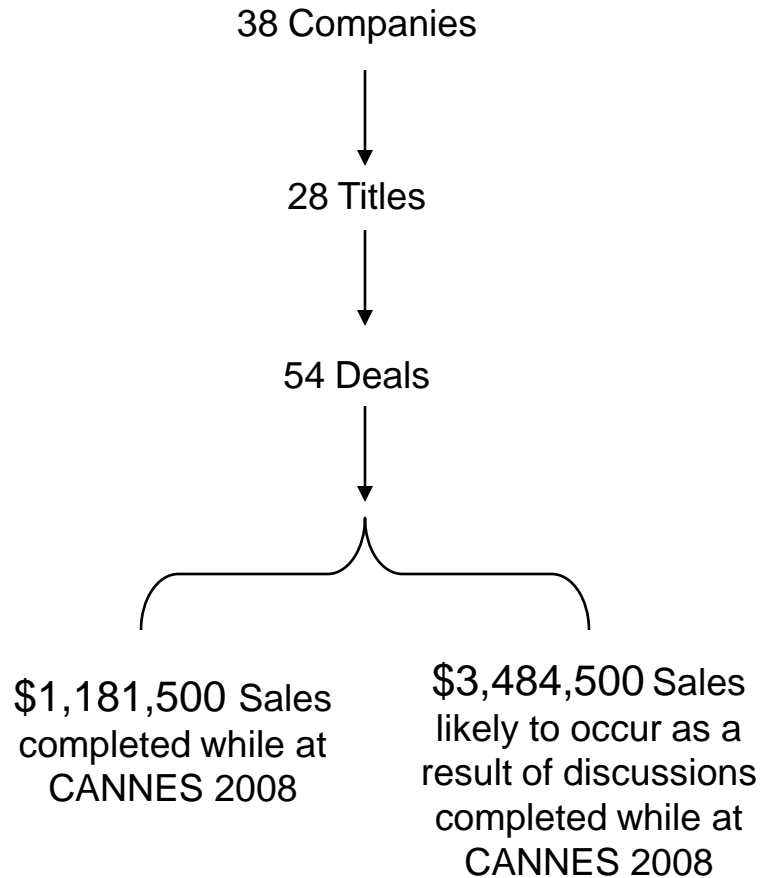
Q7. For each of the programming genre(s) of interest to your company, what was the type of media? N=52

# Sales & Pre-Sales

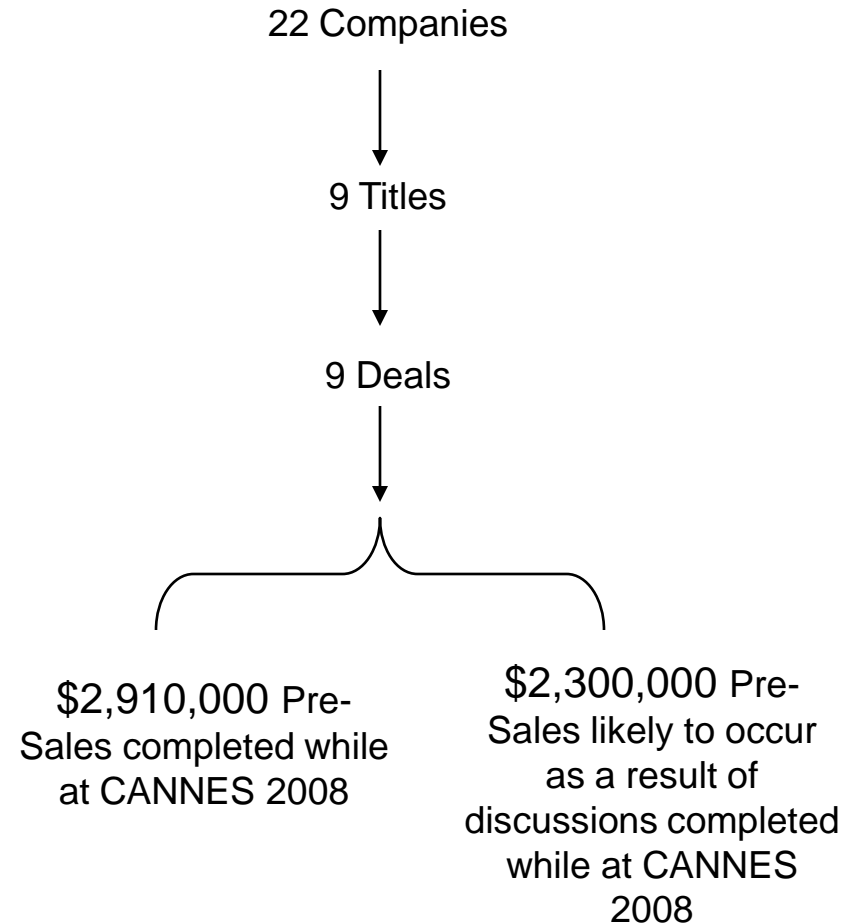
- 38 (73%) companies indicated that they either completed sales while at CANNES or began discussions that are likely to lead to sales.
- 22 companies indicated that they either completed pre-sales while at CANNES or began discussions that are likely to lead to pre-sales.
- In all, 12 companies provided information on 54 deals involving 28 titles.
- Companies reported that 27 distribution agreements were signed.
- Respondents reported that \$1,181,500 of sales were completed while at CANNES 2008 and that \$3,484,500 worth of sales are likely to occur as a result of discussions initiated at the festival.
- Companies reported \$2,910,000 worth of presales at CANNES and expect \$2,300,000 of pre-sales to occur as a result of discussions initiated at CANNES 2008.
- For each deal made while at CANNES 2008 or expected to be made as a result of discussion initiated, 4 of the 28 titles mentioned were part of the Perspective Canada screening program.

# Breakdown of Sales and Pre-Sales Deals

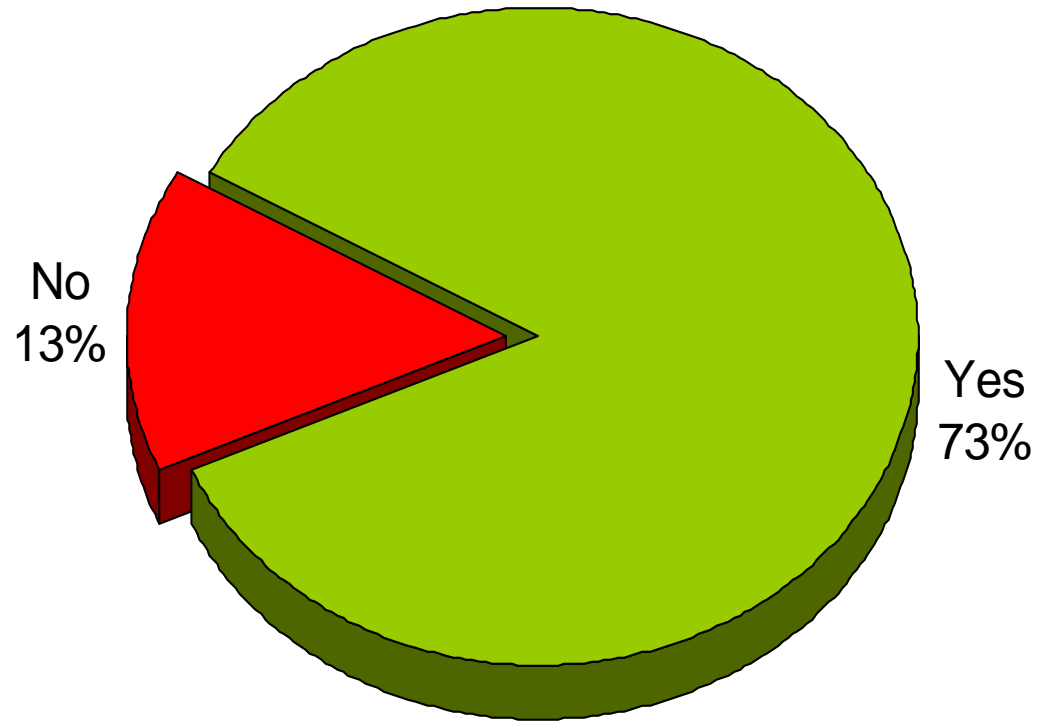
## Sales/Likely Sales



## Pre-Sales/Likely Pre-Sales



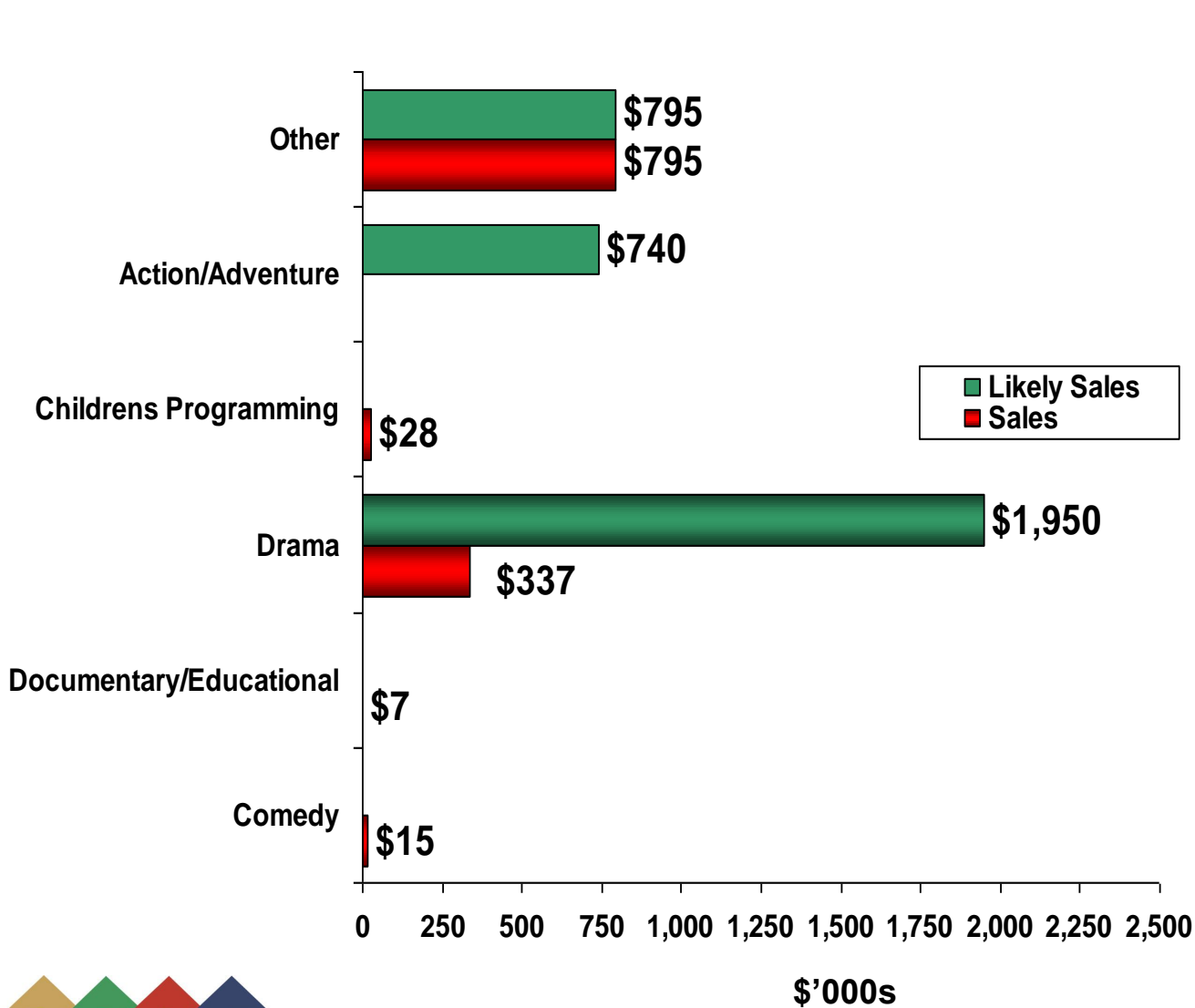
# Sales



Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at CANNES 2008? N=52

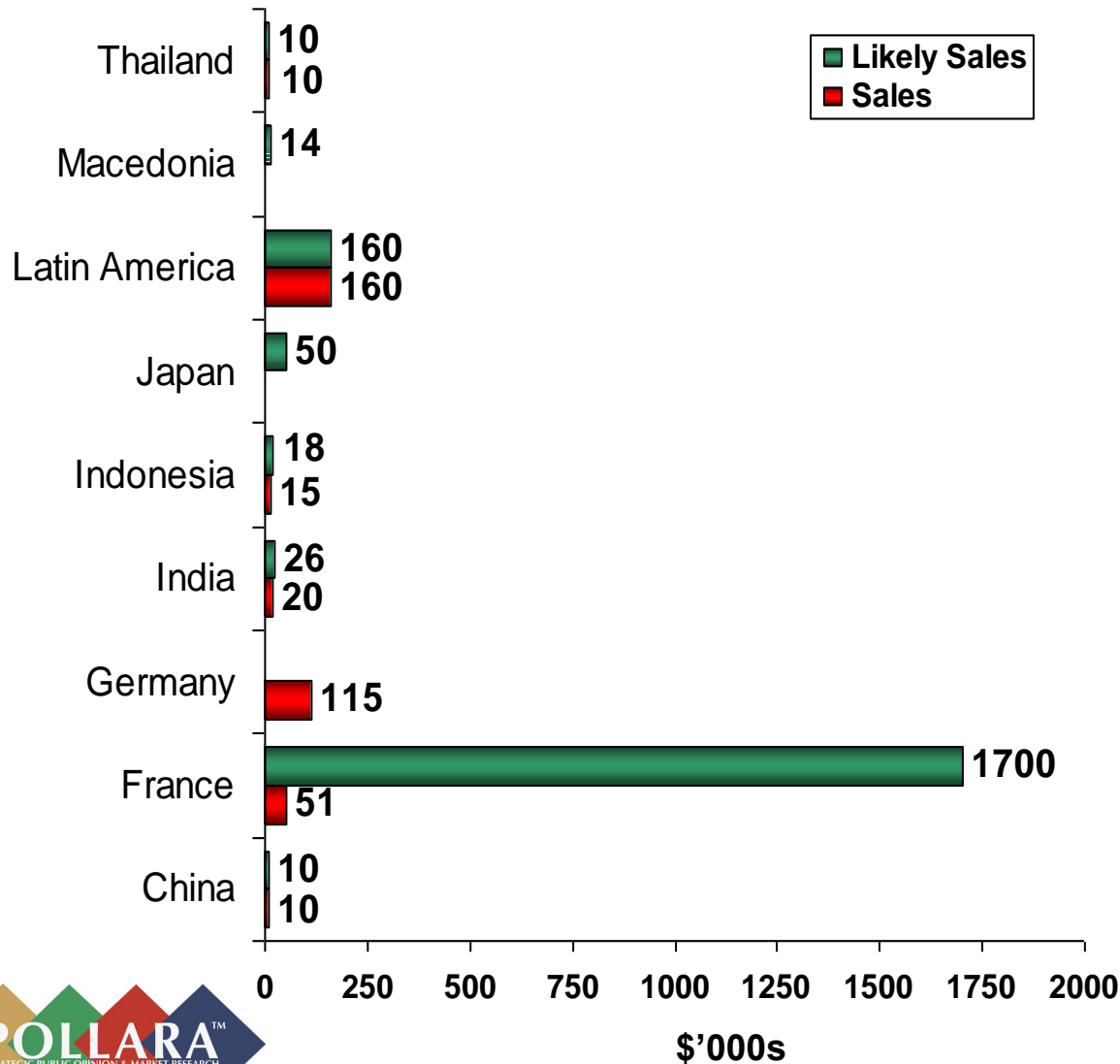


# Breakdown of Likely Sales and Sales by Genre



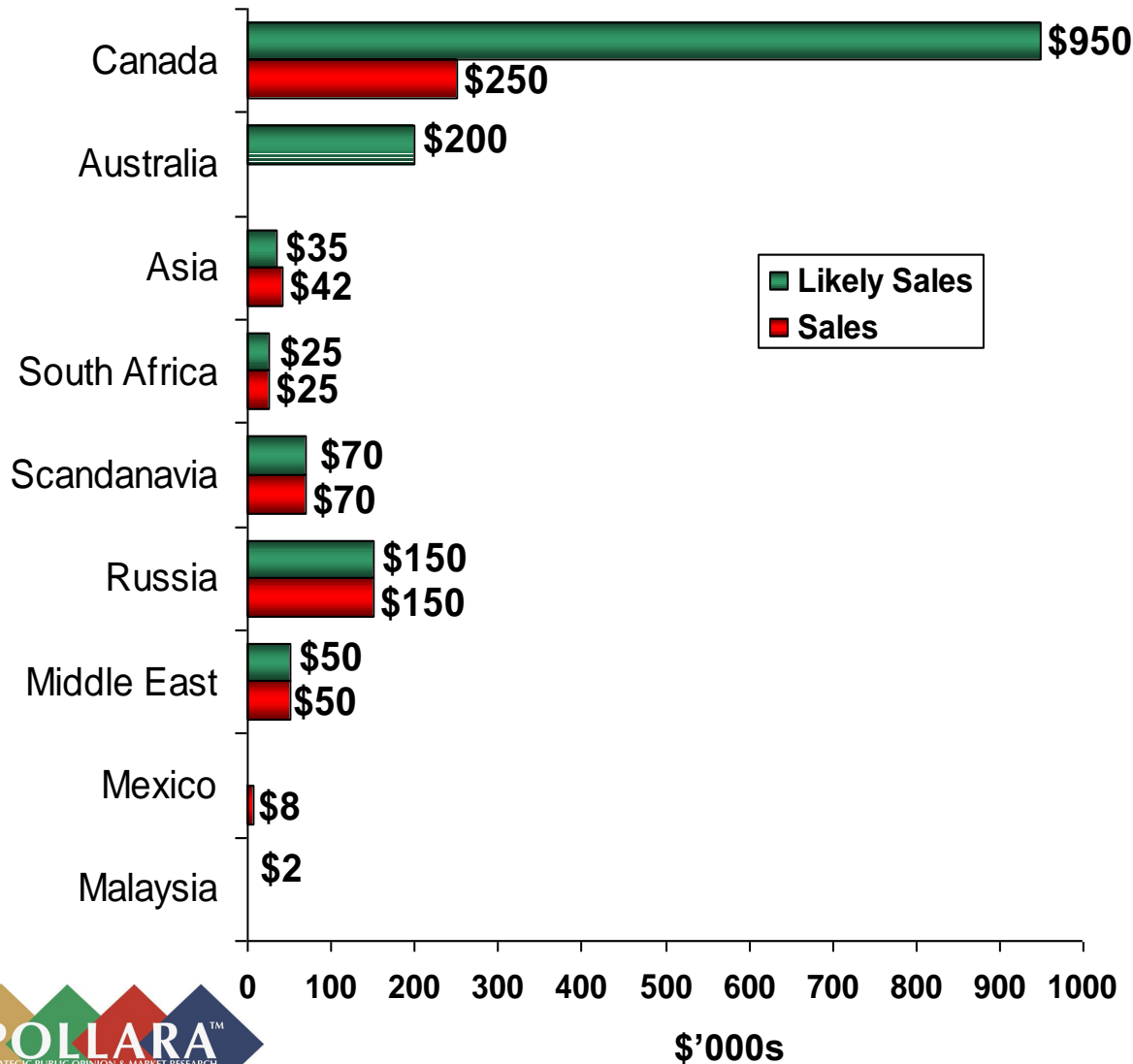
Comp	Titles	Deals
1	1	13
2	2	7
2	2	2
8	14	17
1	1	1
2	2	5

# Breakdown of Likely Sales and Sales by Country



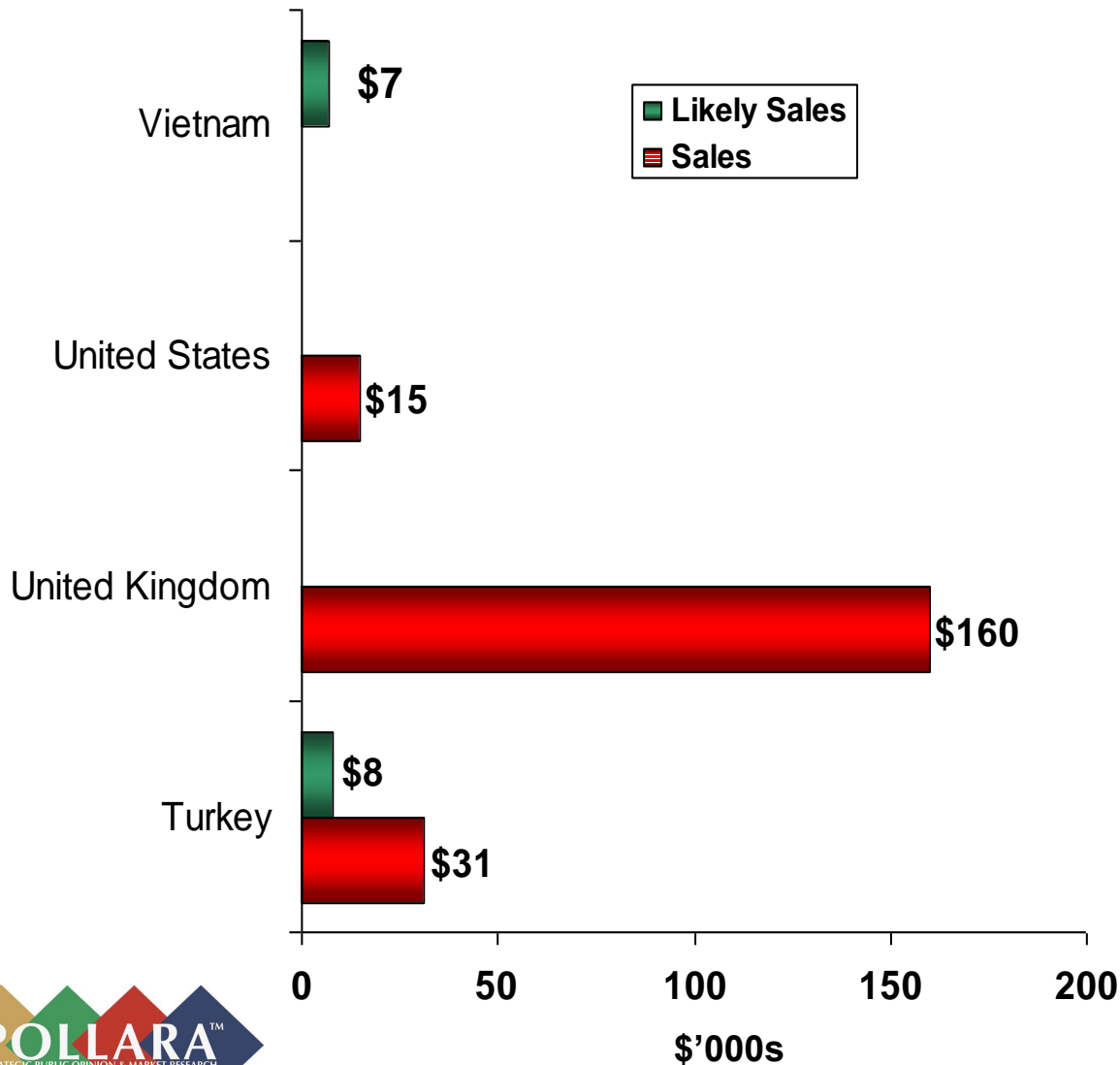
Companies	Titles	Deals
1	1	1
1	1	1
1	1	1
1	1	1
2	2	2
2	2	2
3	3	3
4	6	6
1	1	1

# Breakdown of Likely Sales and Sales by Country



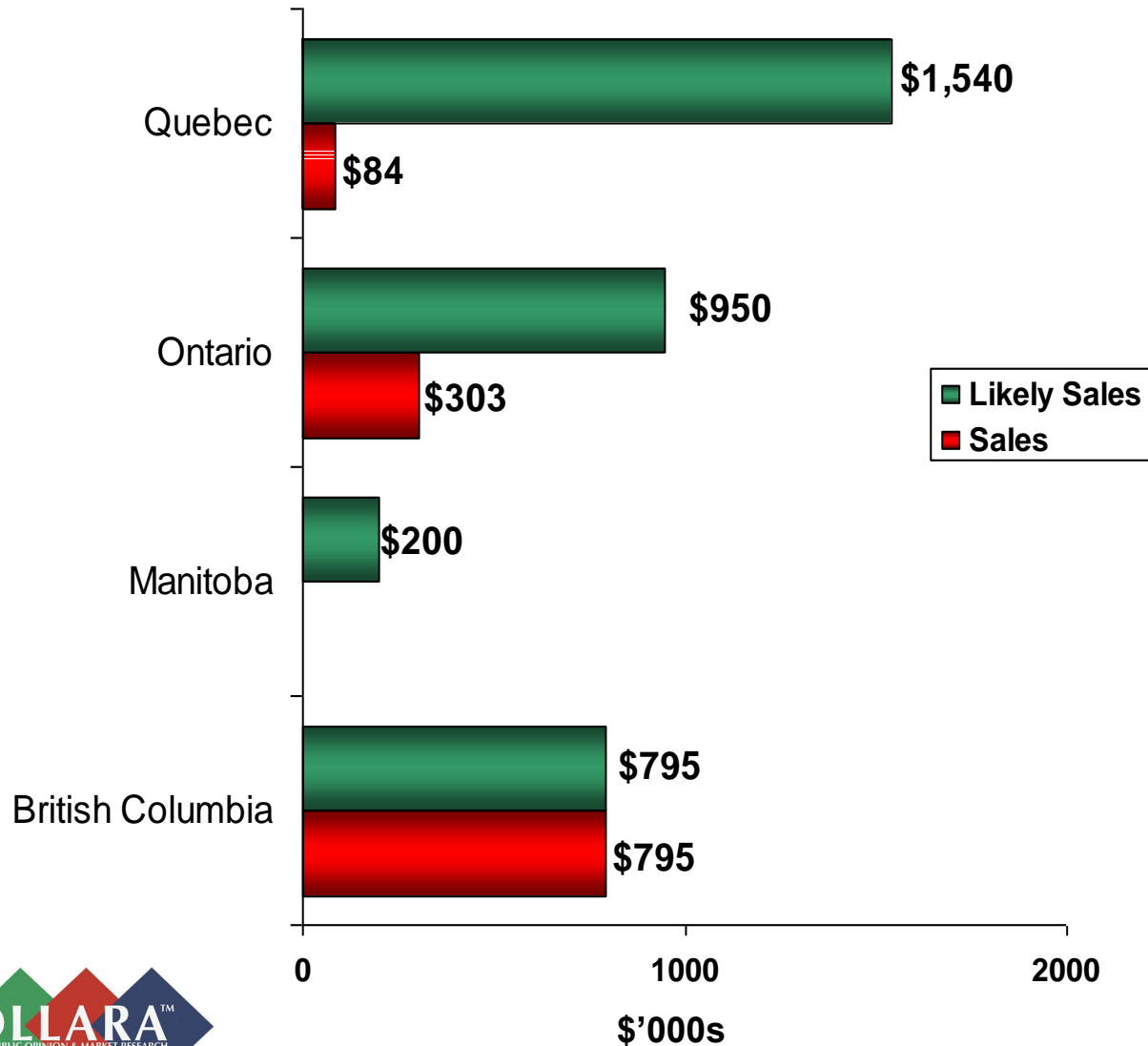
Companies	Titles	Deals
2	2	2
1	1	1
2	2	2
1	1	1
1	1	2
1	1	1
1	1	2
1	1	2
1	1	1

# Breakdown of Likely Sales and Sales by Country



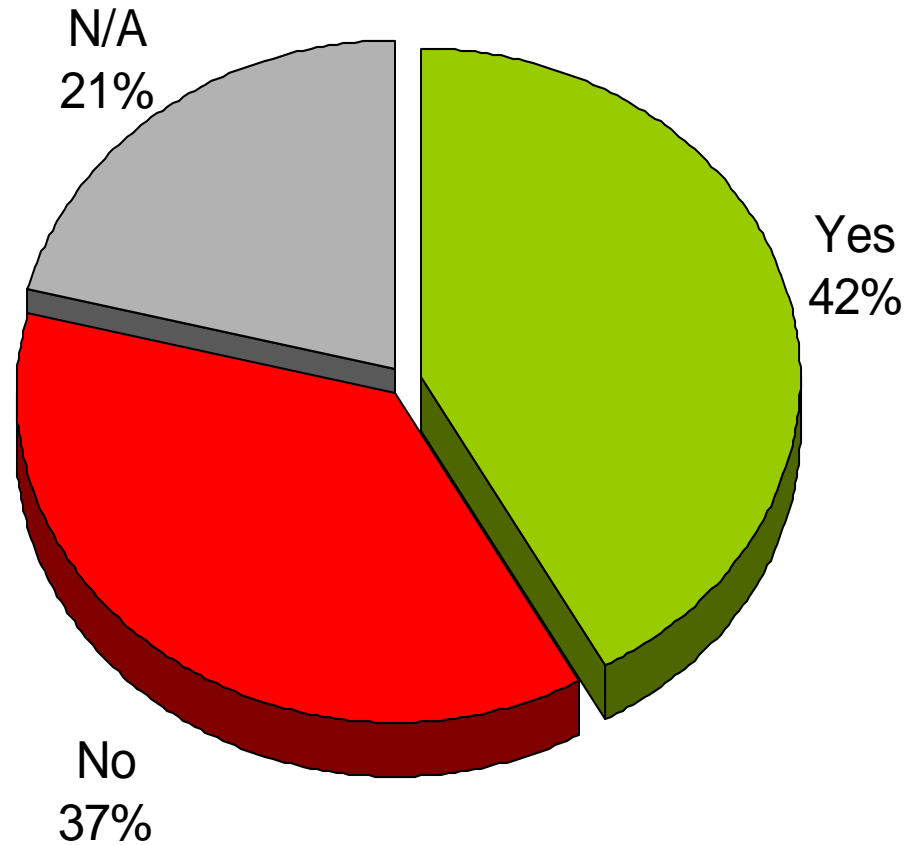
Companies	Titles	Deals
1	1	1
<hr/>		
2	2	2
<hr/>		
2	3	3
<hr/>		
3	4	4

# Breakdown of Likely Sales and Sales by Company Region



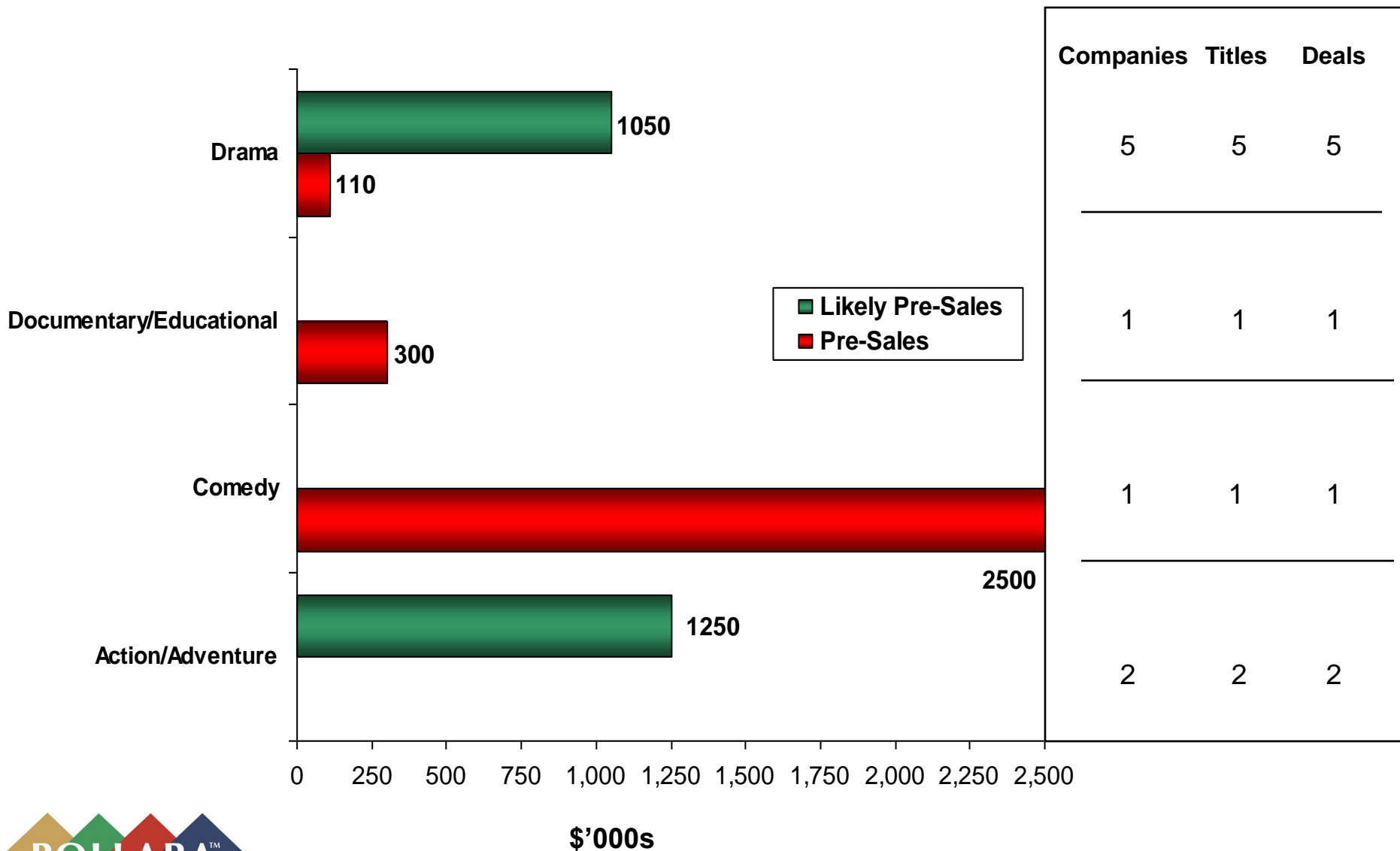
Companies	Titles	Deals
4	14	23
4	6	7
1	1	1
2	2	14

# Pre-Sales

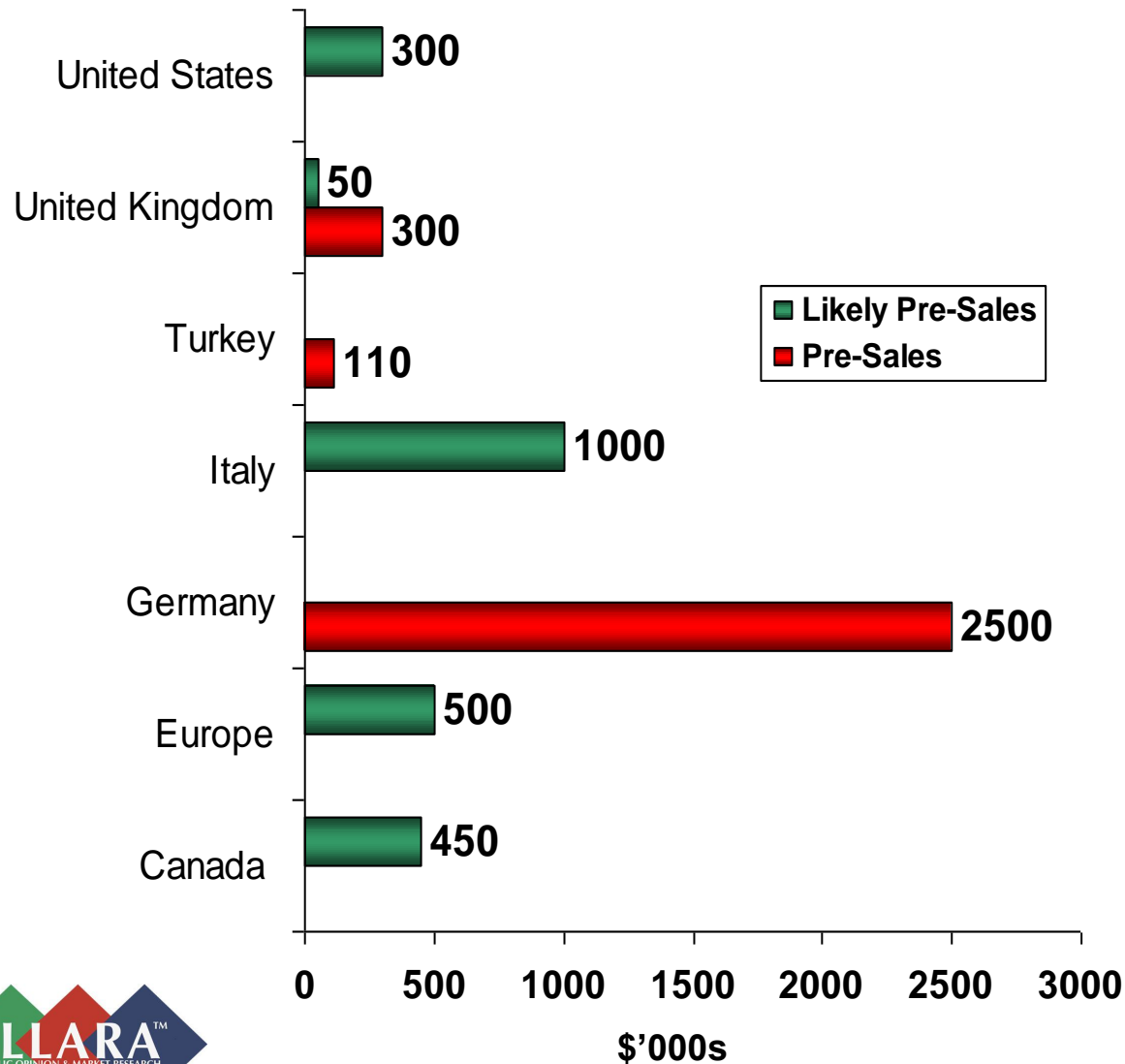


Q8e. Did you complete any pre-sales or begin discussions that will likely lead to pre-sales while at CANNES 2008? N=52

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



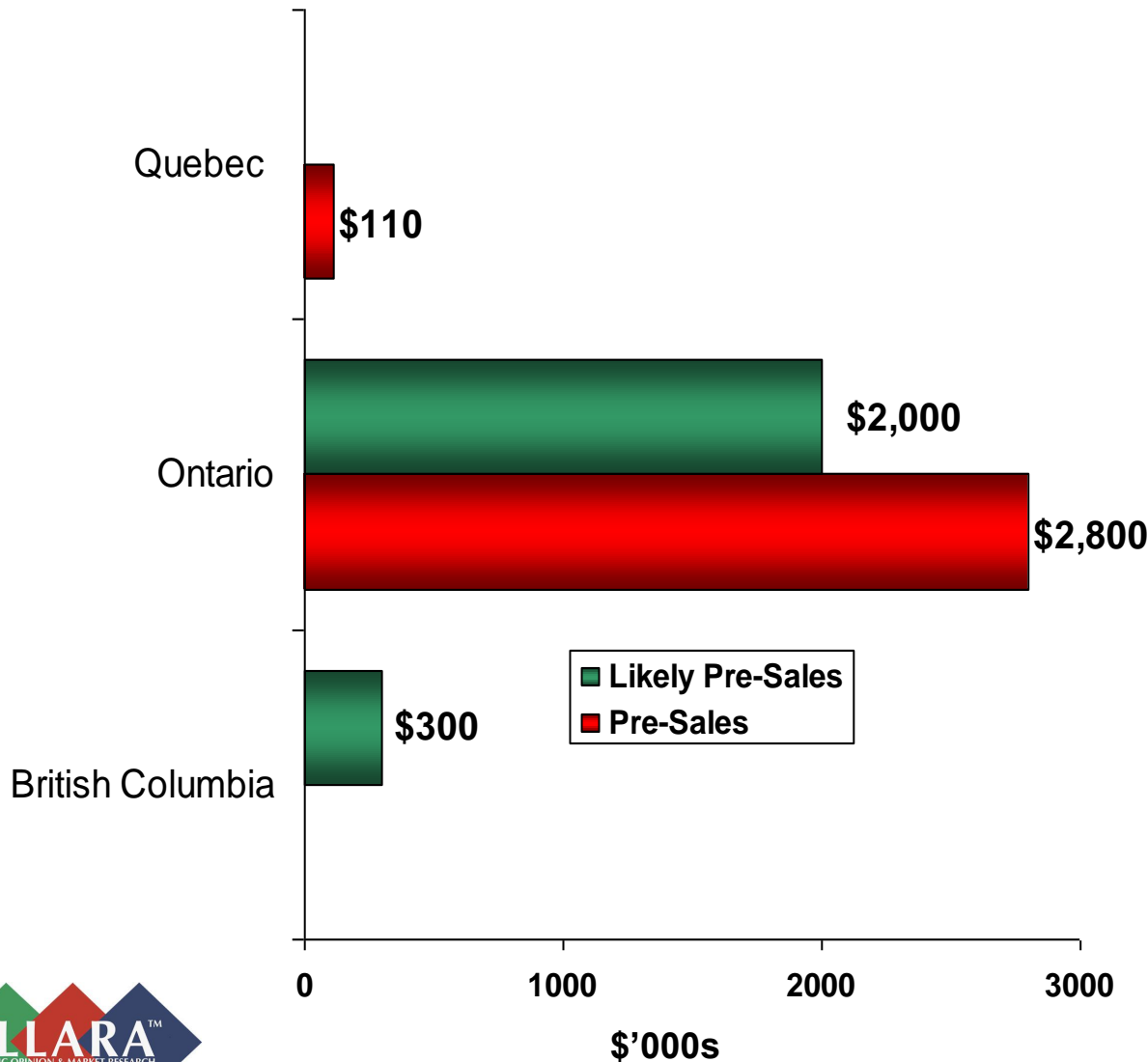
# Breakdown of Likely Pre-Sales and Pre-Sales by Country



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



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



Companies	Titles	Deals
1	1	1
<hr/>		
5	7	7
<hr/>		
1	1	1

# Co-Production and Co-Venture Deals

- 27 companies (52% of those who answered the question) indicated that they either signed, or began negotiating co-production or co-venture deals while at the CANNES 2008.
- These companies declared that 48 co-production or co-venture deals were either signed or would likely be signed as a result of discussions at CANNES 2008.
- 24 companies provided information about the value of co-production or co-venture deals - and reported that the deals were worth \$85,550,000.
- 25 companies provided information about the countries with which deals were made.
- Respondents reported that they participated in an average of 31 business meetings each while at CANNES 2008.

# Co-Production and Co-Venture Deals

Respondent	Number of co-production or co-venture deals	Estimated value of deals to company	Q9d - Countries involved
1	2	\$400,000	Germany, Israel, UK
2	2	\$200,000	United States
3	2	\$8,000,000	France, Germany, UK
4	2	\$10,000,000	Europe
5	3	\$250,000	France
6	1	\$5,000,000	United Kingdom
7	1	\$0	United Kingdom
8	0	\$7,000,000	Ireland
9	1	\$2,000,000	South Africa
10	2	\$250,000	Ecuador, Mexico
11	3	\$2,000,000	Did not answer
12	1	\$200,000	France
13	3	\$6,000,000	Croatia, Ireland, Israel, UK
14	3	\$0	Canada, Germany, Japan, US
15	1	\$200,000	Ireland
16	1	\$500,000	UK
17	2	\$2,000,000	Canada, France, Hungary, Israel, Slovenia, UK

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

Respondent	Number of co-production or co-venture deals	Estimated value of deals to company	Q9d - Countries involved
18	1	\$350,000	United Kingdom
19	2	\$2,000,000	Brazil
20	1	\$200,000	Italy
21	2	\$7,000,000	Italy, UK
22	2	\$2,000,000	United Kingdom
23	3	\$7,000,000	China, France, Italy
24	0	\$0	Did not answer
25	3	\$20,000,000	Germany
26	1	\$2,000,000	United Kingdom
27	2	\$1,000,000	South Africa

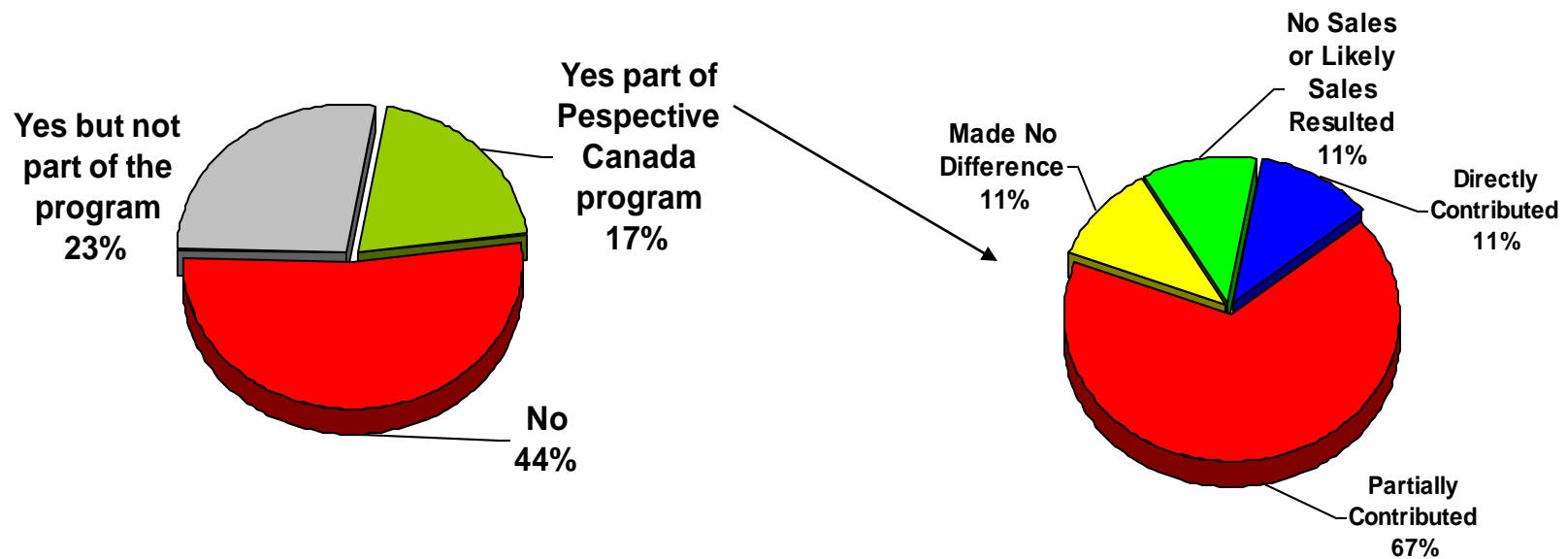
# Co-Production and Co-Venture Deals by Company Region

Region	Q9a - Number of companies that signed/negotiated co-prod/co-venture deals	Q9b - Number of co-production or co-venture deals	Q9c - Estimated Value of deals to company
British Columbia	5	8	\$13,400,000
Quebec	7	15	\$34,500,000
Ontario	10	18	\$23,450,000
Saskatchewan	1	1	\$5,000,000
Nova Scotia	1	0	\$7,000,000
Manitoba	1	1	\$0
Newfoundland & Labrador	2	2	\$2,200,000

- Q9a. Did you either sign, or begin negotiating any co-production or co-venture deals while at CANNES 2008?
- 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 CANNES 2008?
- Q9c. What is the estimated value to your company of these co-productions or co-venture deals (in Canadian Dollars)

# Title Screening and perceived contribution to sales activities from the Perspective Canada screening program

- 21 respondents (40%) indicated that they had a title screened at CANNES 2008. 9 of these respondents had their titles screened as part of the Perspective Canada screening program.
- Over three-quarters (78%) believed that the Perspective Canada screening program contributed to sales activities in some way.



Q11. Were any of your titles screened at CANNES 2008? (n=52)

Q11a. (IF YES as part of the "Perspective Canada screening program" from Q11) In what way did the "Perspective Canada" program contribute to your sales activities? (n=9)

# Title Screening

- 21 respondents (40%) indicated that they had a title screened at the 2008 Cannes Film Market.
- These respondents gave an average satisfaction score of 5.9 for the visibility their titles received from the screenings

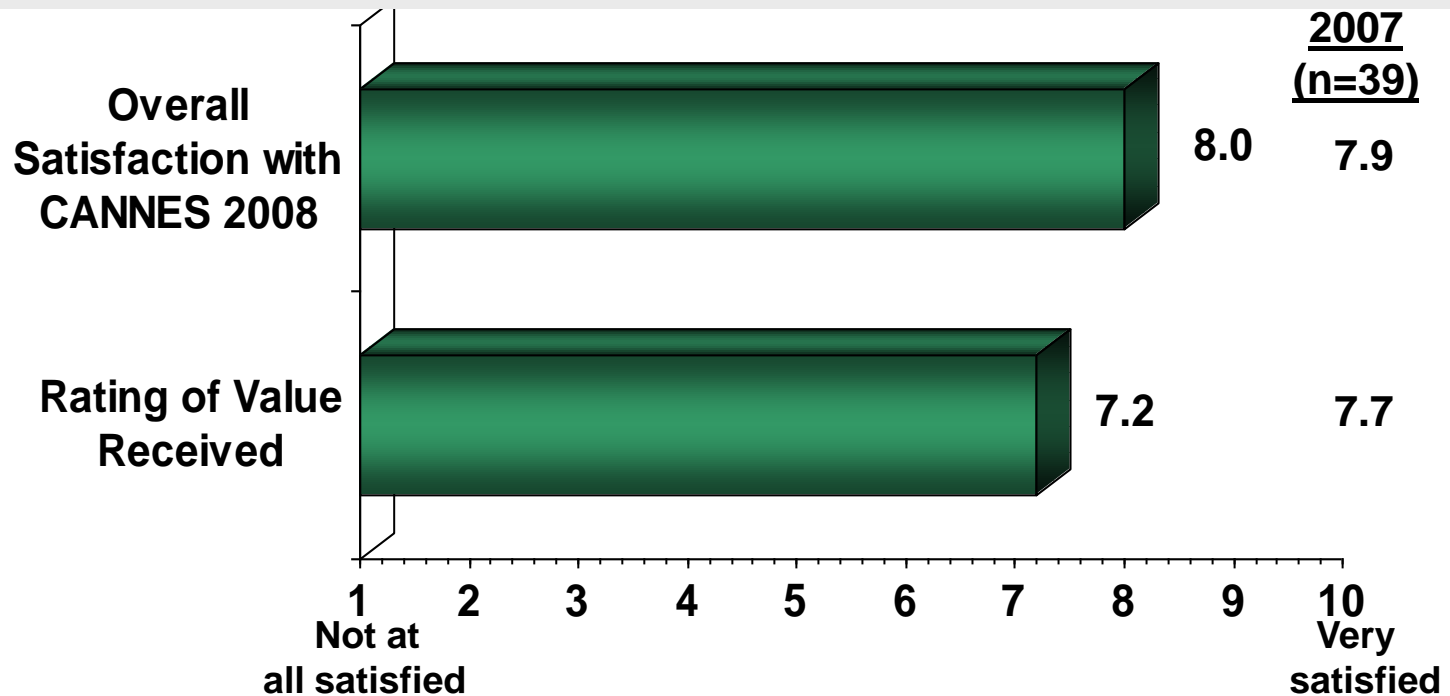


Q11. Were any of your titles screened at the 2008 CANNES Film Market? (n=52)

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, CANNES 2008

- When rating the overall satisfaction with CANNES 2008, 8 in 10 (Up one percentage point from 2007) companies are satisfied. When Companies were asked to rate the value received, a slight decline was found (Down 5 percentage points).

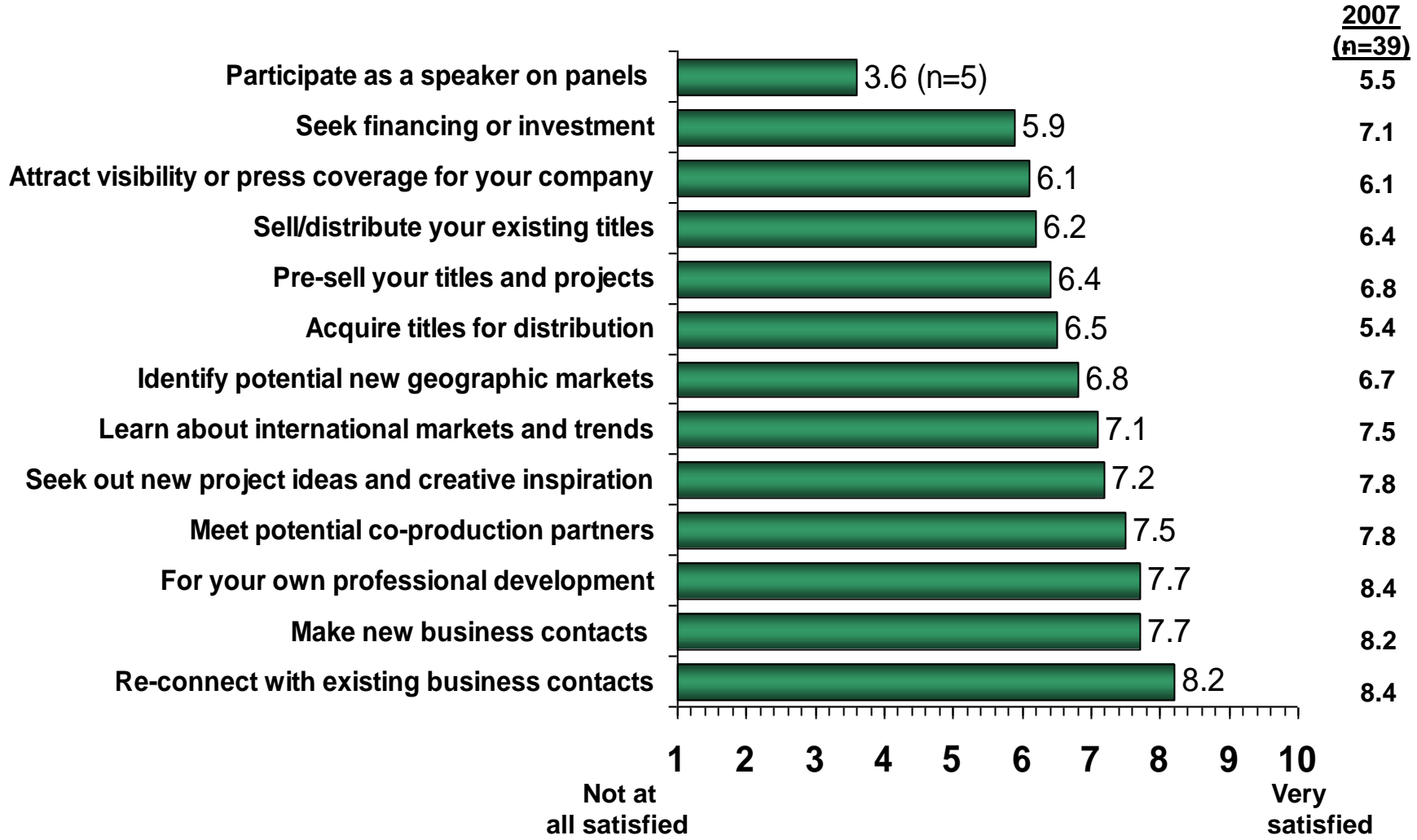


Q13a. How satisfied would you say you were overall with CANNES 2008 in terms of facilities provided, meeting potential contacts, programming, support etc...using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. N=52

Q13b. And thinking about what it costs your company to attend, and the quality of the services and support provided at CANNES 2008, how would you rate the VALUE you received on the same 1 -10 scale... N= 52



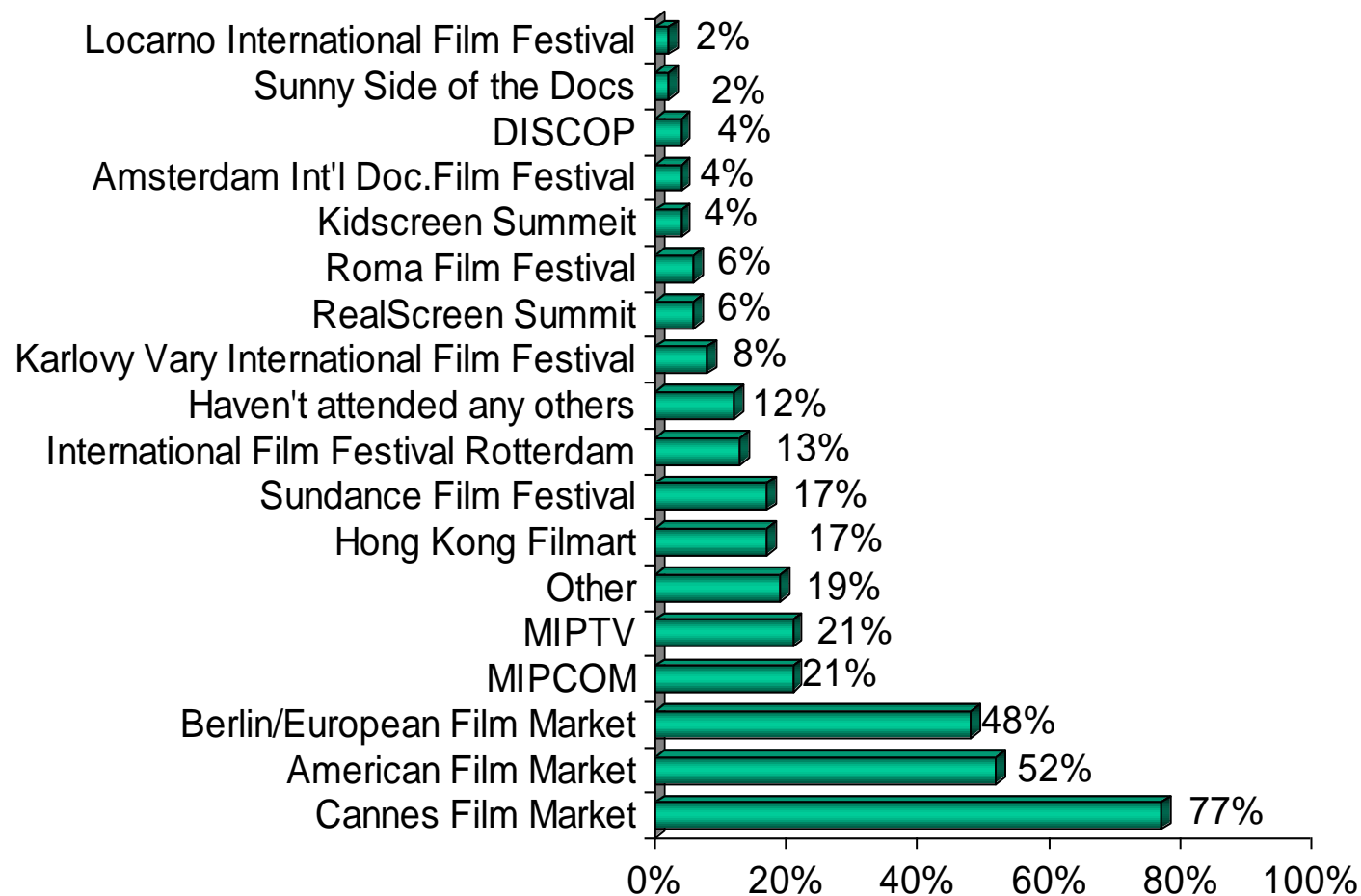
# Satisfaction with CANNES 2008



Q13c. How satisfied were you with CANNES 2008 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=52

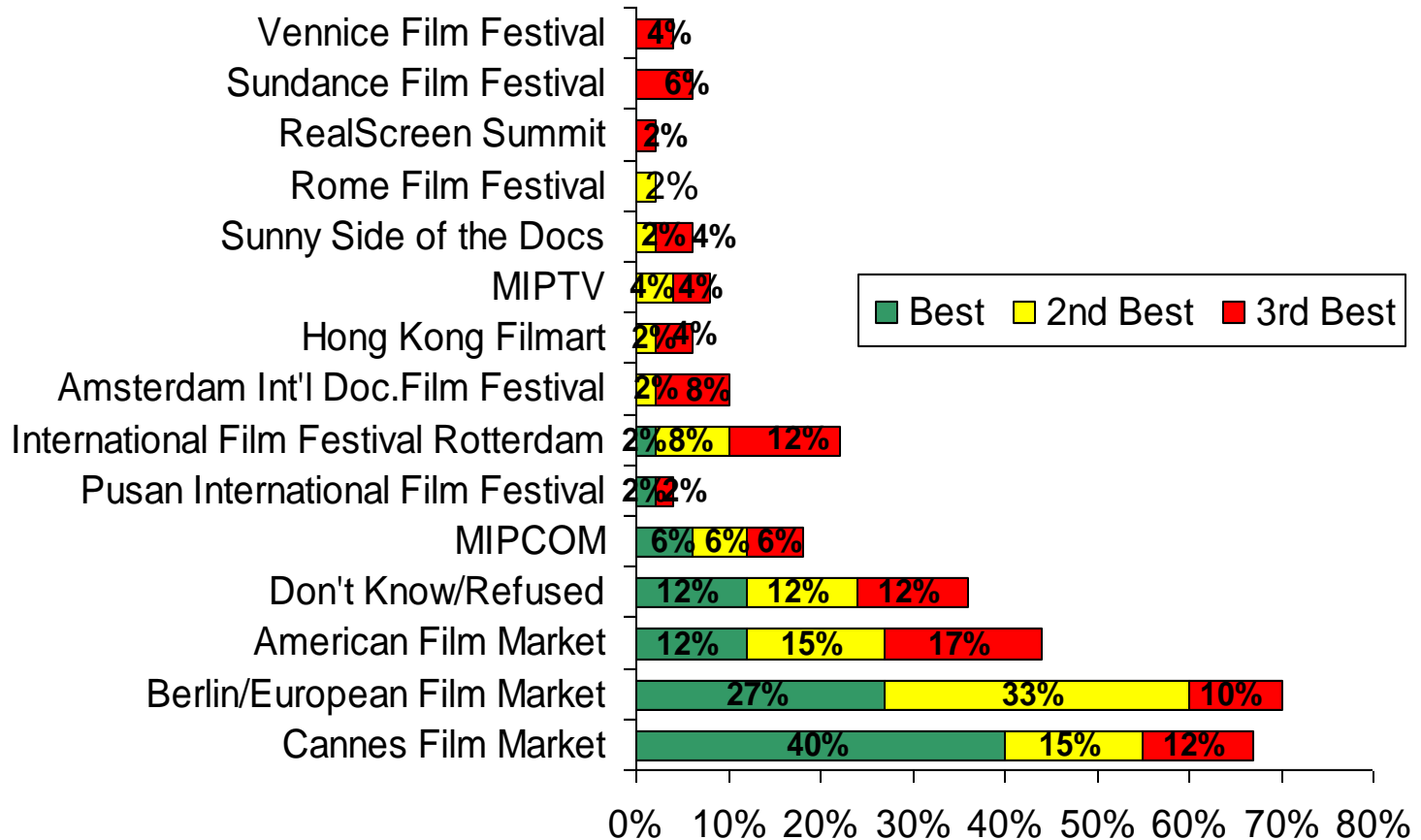


# International Markets & Festivals Attended



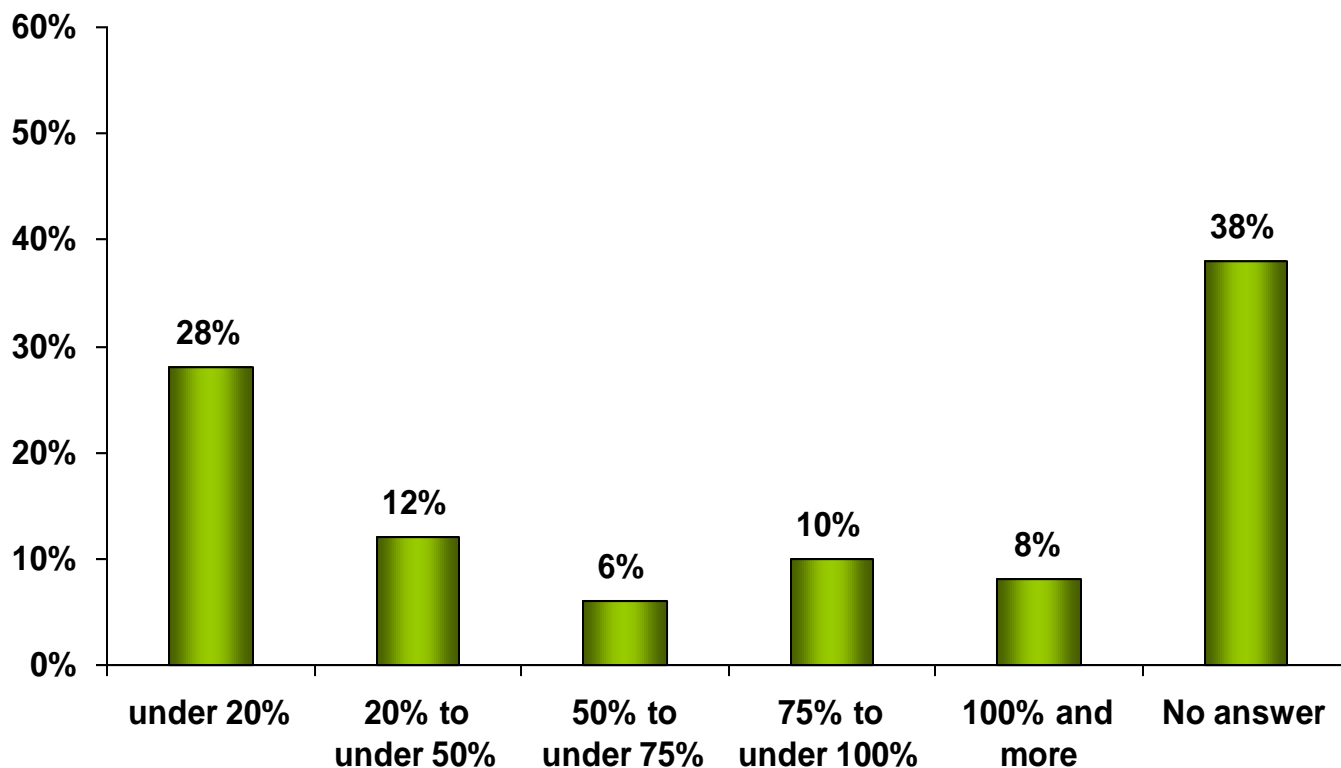
Q14. Which, if any of the following international markets and festivals held in other countries have you attended during the past two years? *Select all that apply:*  
N=52

# Rating of International Festivals & Markets



Q15a,b,c Thinking of CANNES 2008 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=52

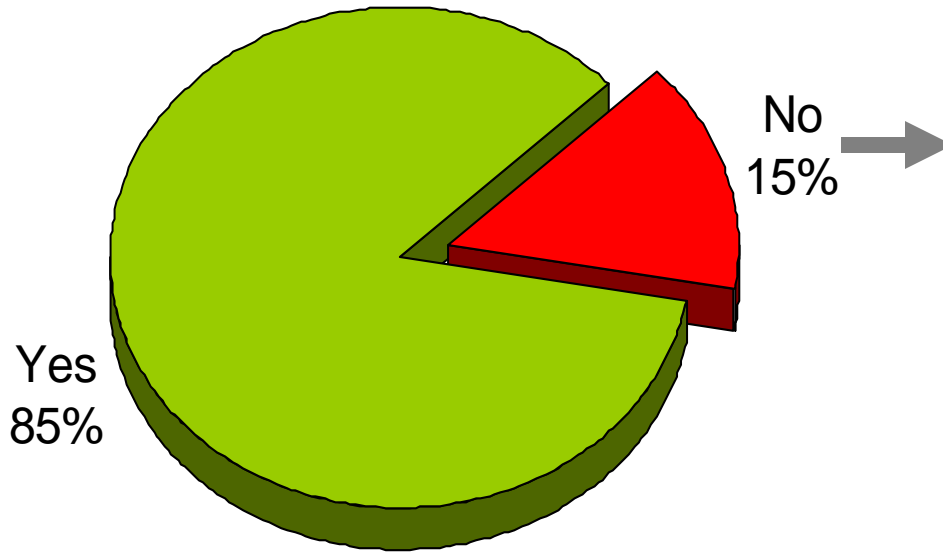
# Percentage of gross revenues from international sales



Q16. What percentage of your company's gross revenues in your most recent fiscal year came from international sales? N=52

# Used Services of Canada Pavilion?

## Used Canada Pavilion?



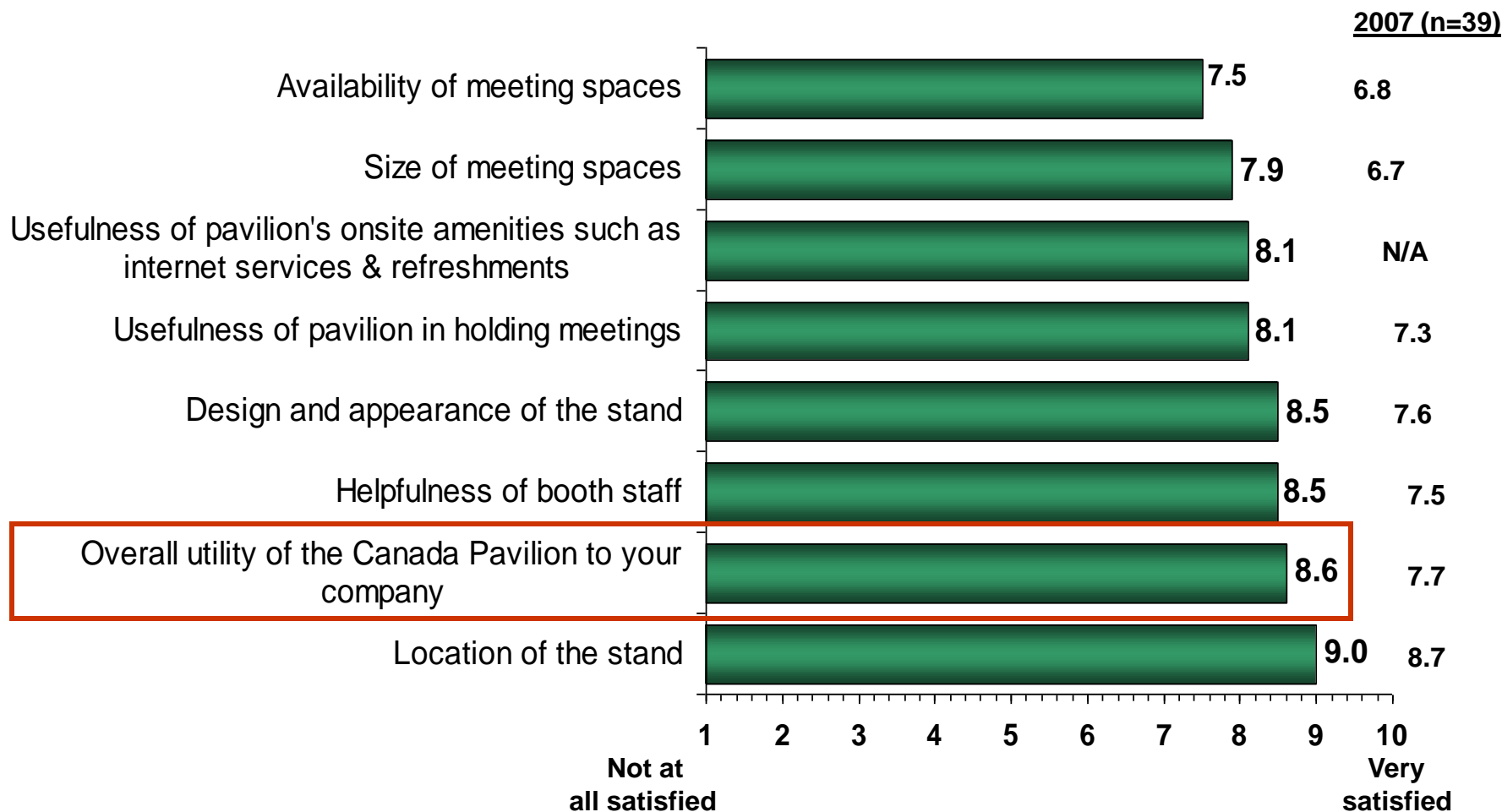
## Why Not?

- *“Didn’t need to.”*
- *“Only used message service & meeting point options. For everything else, better alternatives elsewhere.”*
- *“I did use the computers, if that counts as service. As for the programs, I have many international contacts from when I worked for Alliance Atlantis in international, so I felt capable of making my own meetings and introductions.”*
- *“In desire of equity, we used the Sodec pavilion this year, as we are always with Telefilm Canada. Even if the Canadian pavilion always gives us an excellent service from its hard and competent working hosts, few of our clients have been rushed out of the pavilion either because they did not have the “VIP” badge or because a (new) host (asking our client for who they are waiting for) doesn’t know well the actors of the main canadian companies, like us for example.”*
- *“We were not, nor have we ever been included in any functions whatsoever or included in any programs offered by Telefilm / the Canada Pavilion. We are completely ignored by Telefilm, even though IndustryWorks is a “Telefilm Recognized” foreign sales agent - Whatever that means. In short, we always have, and still do get absolutely no support from Telefilm Canada whatsoever.”*
- *“We didn’t need to as we were only pre-selling a title in pre-production.”*
- *“Used very little since we had our own office.”*

Q17 Did you use the services & programming provided by the Canada Pavilion at CANNES 2008? N=52

Q18 (IF “NO” TO Q17) Why didn’t you use the services & programming provided at the Canada Pavilion? N=8

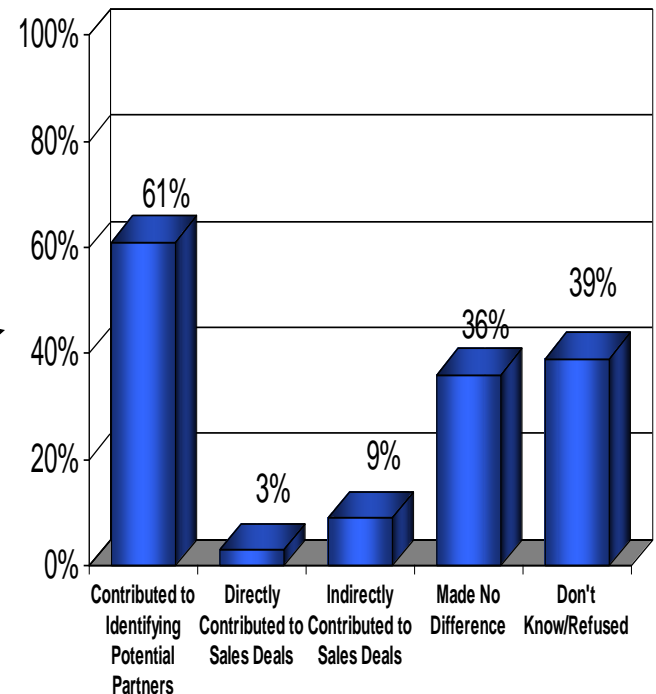
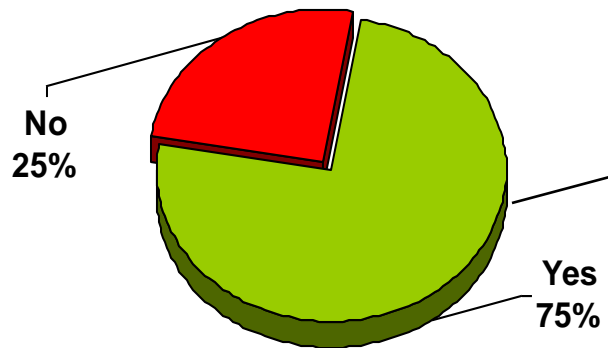
# Satisfaction with Canada Pavilion



**Q19** Please rate your level of satisfaction with each of the following aspects of the Canada Pavilion at CANNES 2008 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= 52**

# Canada Pavilion Programming

- 33 respondents (75%) indicated that they had participated in the CANADA MEETS WITH DISTRIBUTORS AND INTERNATIONAL SALES AGENTS networking initiative. Six-in-ten (61%) stated that the initiative contributed to identifying potential partners.

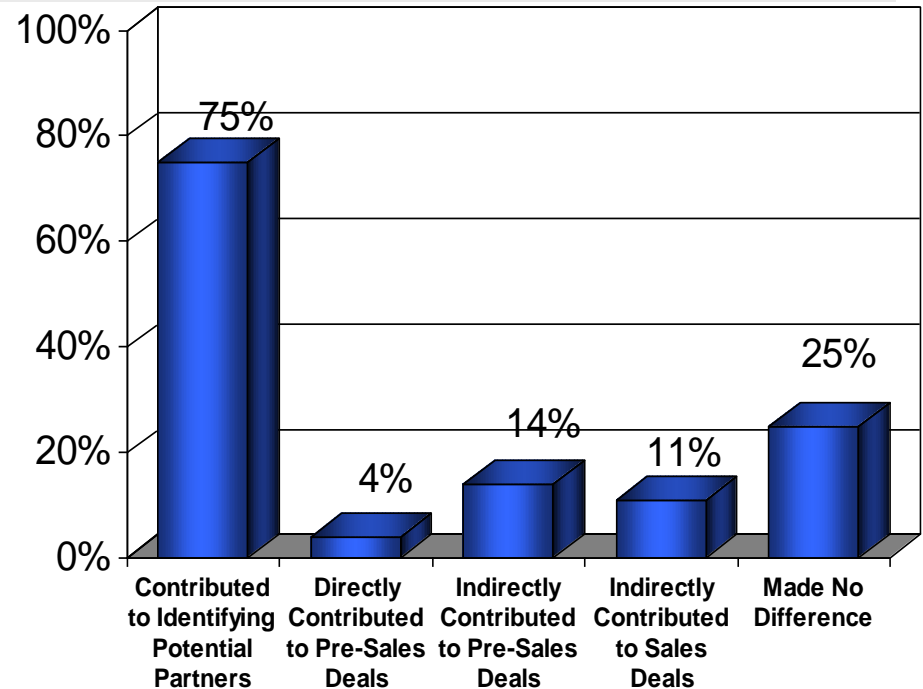
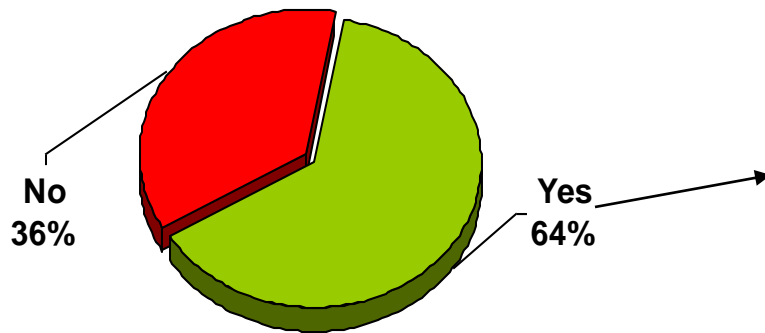


19b. Did you participate in the CANADA MEETS WITH DISTRIBUTORS AND INTERNATIONAL SALES AGENTS networking initiative? (n=52)

Q19c. (IF YES to participating in Q19b) In what way did this initiative contribute to your experience at Cannes 2008? Select all that apply (n=33)

# CANADA MEETS EUROPEAN PRODUCERS networking initiative

- 28 respondents (64%) indicated that they participated in the Canada MEETS EUROPEAN PRODUCERS networking initiative at the Canada Pavilion. Three-quarters (75%) of these respondents indicated that the initiative contributed to identifying potential partners.

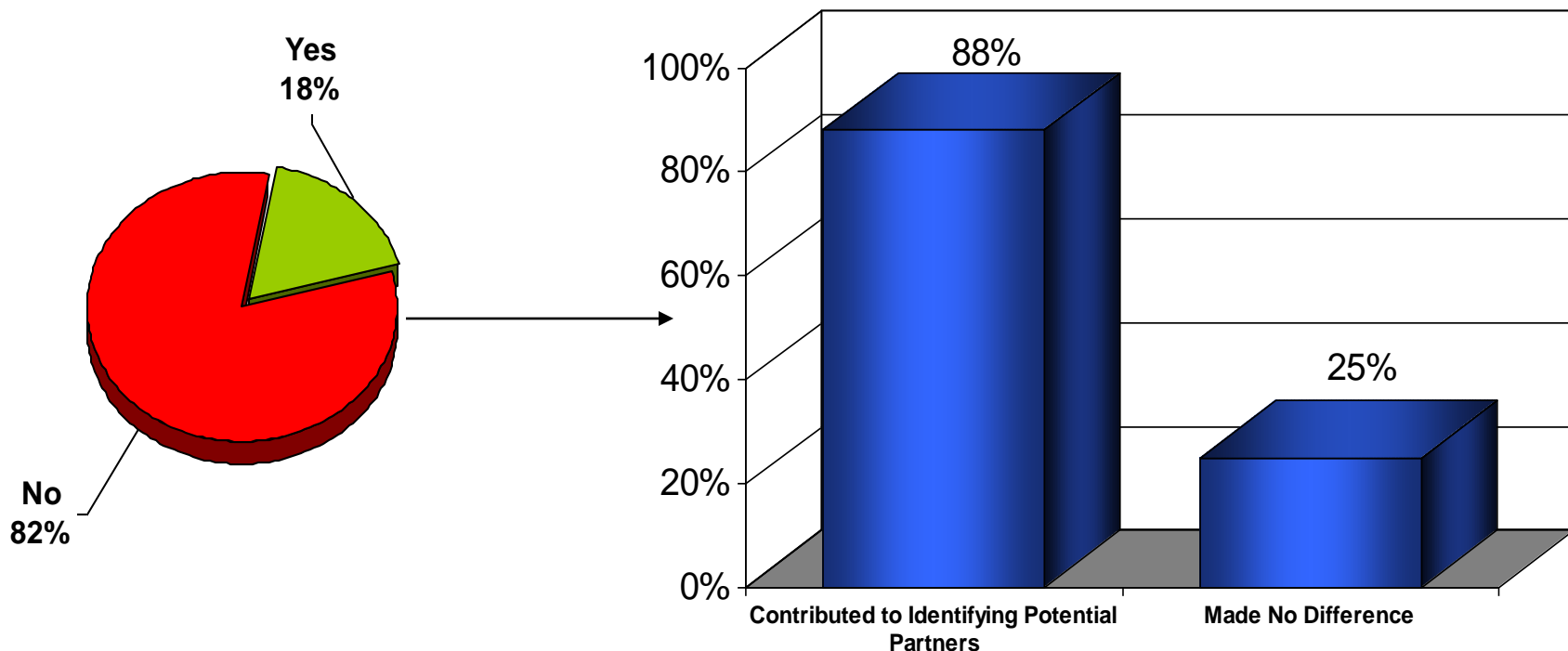


- 19.d Did you participate in the CANADA MEETS EUROPEAN PRODUCERS networking initiative ? (n=44)
- 19e. (IF YES to participating in Q19d) In what way did this initiative contribute to your experience at Cannes 2008 ? Select all that apply (n=28 )



# CANADIAN PRODUCERS MEET WITH PRODUCERS FROM THE ASIA-PACIFIC REGION networking initiative

- 8 respondents (18%) indicated that they participated in the Canada PRODUCERS MEET WITH PRODUCERS FROM THE ASIA-PACIFIC REGION networking initiative. Nine-in-ten (88%) of these respondents indicated that the initiative contributed to identifying potential partners.

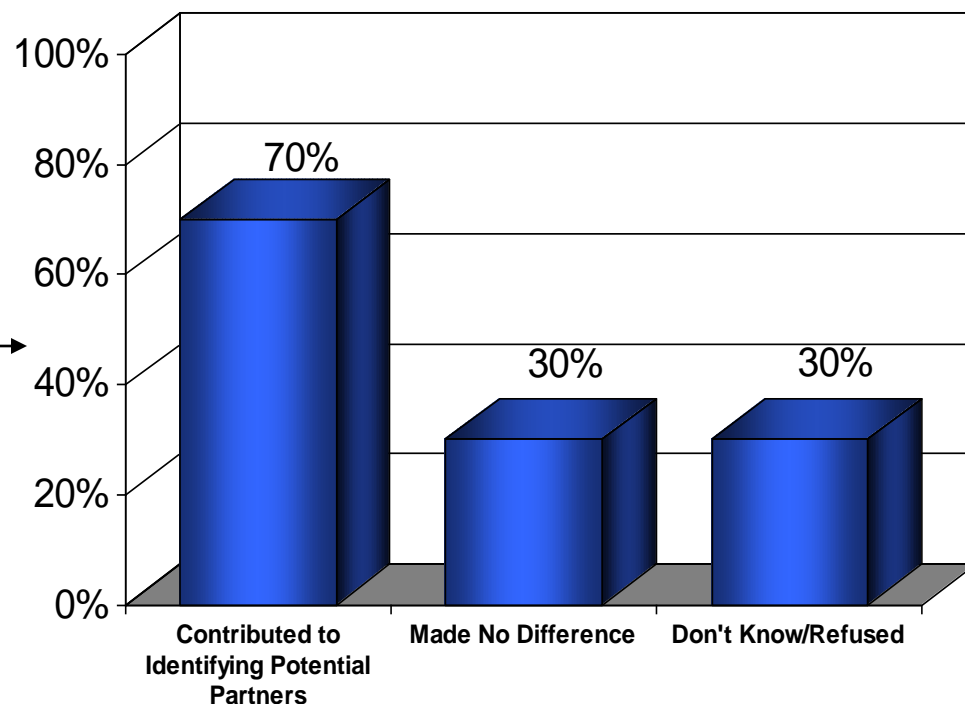
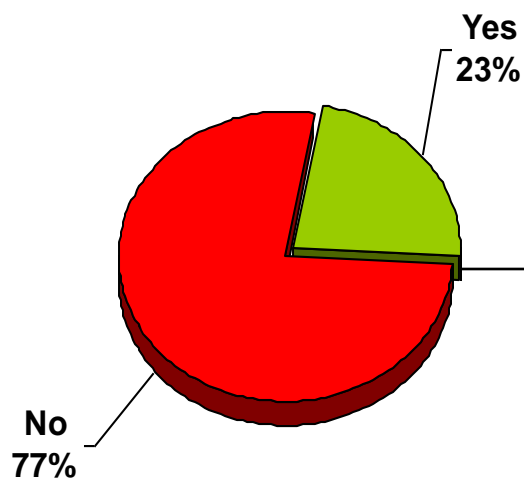


19.f Did you participate in the CANADIAN PRODUCERS MEET WITH PRODUCERS FROM THE ASIA-PACIFIC REGION networking initiative? (n=44)

19.g. (IF YES to participating in Q19f) In what way did this initiative contribute to your experience at Cannes 2008? Select all that apply (n=8 )

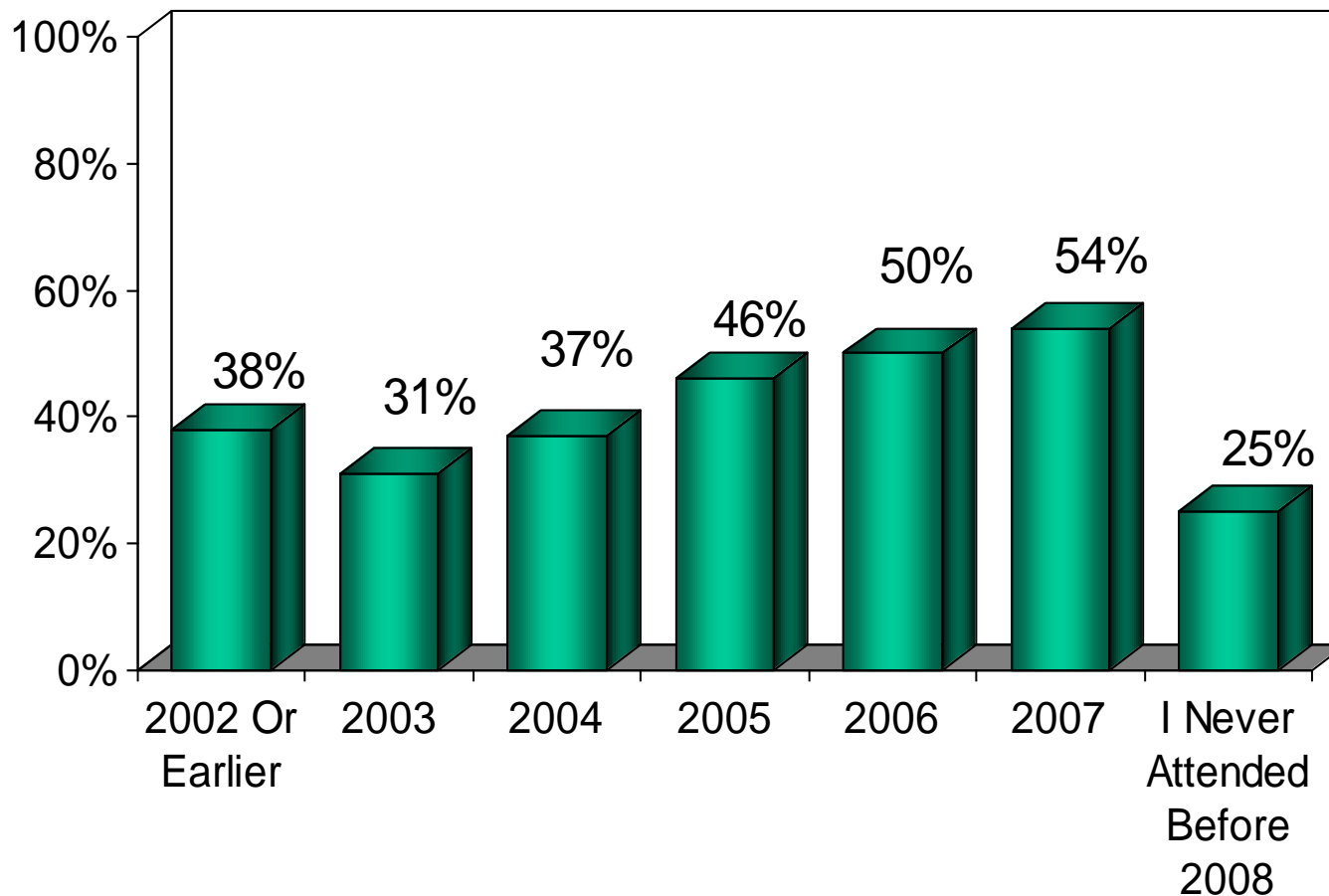
# Producers' Network component spotlighting Canada or in the "speed dating" session planned for all francophone producers

- 10 respondents (23%) indicated that they participated in the Producers' Network component. Seven-in-ten (70%) of these respondents indicated that the initiative contributed to identifying potential partners.



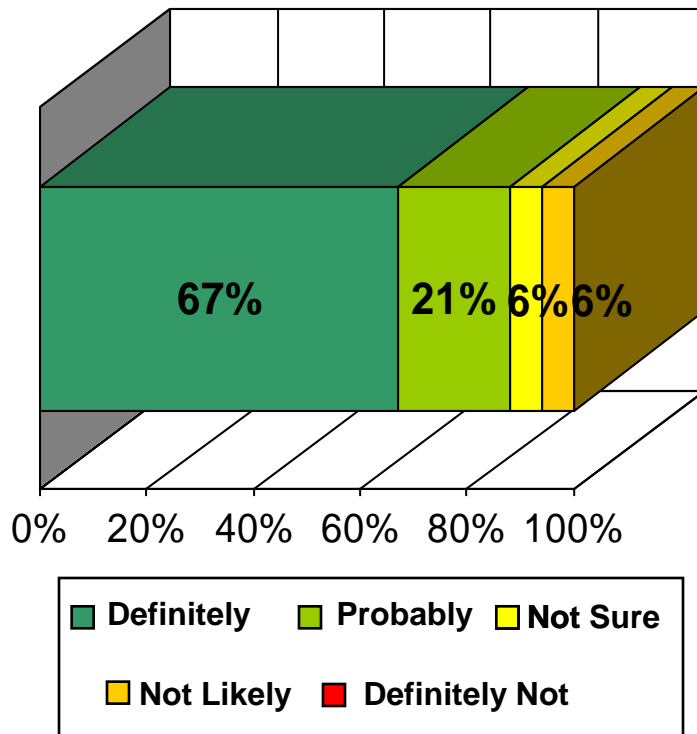
- 19h. Did you participate in the Producers' Network component, which spotlights Canada or in the "speed dating" session planned for all francophone producers. (n=44)
- 19i. (IF YES to participating in Q19h) In what way did this initiative contribute to your experience at Cannes 2008? Select all that apply (n=10)

# Past Attendance at CANNES events



Q21. Which previous Cannes events, if any, has your company attended?  
*Select all that apply: N=52*

# Likelihood of, and Reasons for, Recommending CANNES to Others



- *“largest media market in the world indispensable”*
- *“It's an important part of reaching out to international (potential) co-producers and sales agents. If I stayed in Canada, we wouldn't have the chance to shop our projects face-to-face with international sales agents.”*
- *“If you are in the feature film business, it's the venue to attend.”*
- *“Useful in many ways, requires repeated visits to build networks, etc.”*
- *“Cannes is the premiere marketplace for pre-sales meetings and co-production/co-venture partnership meetings.”*
- *“A toutes les entreprise d'effets spéciaux visuel, d'animation.”*
- *“Participation at Cannes is essential if our company is to be viewed as a potential international partner. If one is only producing for the Canadian market, Cannes is only helpful from a professional development standpoint.”*

**Q22a. Would you recommend Cannes Film Festival and Marché du Film to other companies in the Canadian audio-visual industry? Select one: ? N=52**

**Q22b. Please explain your answer.**

# Cost of Attending CANNES 2008 and Funding Received

- Companies incurred an average cost of \$15,145 in attending the CANNES 2008.
- 50% of respondents (26 companies) indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend CANNES 2008.
- Seven companies reported receiving federal funding in amount of \$70,500. The median amount was \$10,071.
- Twenty-four companies indicated that they had received provincial funding ranging in amount from \$2,000 to \$15,000. The median amount was \$3,279.

**Q24. Did you receive any funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend CANNES 2008? Note: include any travel monies provided by governments as part of support to specific project budgets. (Canadian Dollars) ? N=52**

**Q25. What amount of funding support did you receive from the federal government and from the provincial government to attend CANNES 2008 ? N=26**

# **Conclusions**

# Conclusions

- As a result of the 65% response rate to the survey, and possible concerns about non-response bias, the sales data within this report should be treated with some caution.
  - Almost three-quarters of respondents (73%) indicated that they either completed sales, or began discussions that are likely to lead to sales while at the event.
  - Over two-fifths of respondents (42%) said that they either completed pre-sales, or began discussions that are likely to lead to pre-sales.
  - Over half of the respondents (52%) either signed or began negotiating co-production or co-venture deals.
  - \$1,181,500 of actual sales, \$3,484,500 of likely sales, \$2,910,000 of likely pre-sales, and expectations of \$2,300,000 of pre-sales together with \$85,550,000 of co-production or co-venture deals were reported by survey participants.
- Since not all companies who said they had completed sales or pre-sales provided details of the transactions, it is likely that these numbers slightly underestimate the true value of sales and pre-sales at Cannes.

# Conclusions

- Overall, participants were very satisfied with the Cannes Film Market, giving an overall satisfaction score of 8.0 out of 10. This is consistent with last year's score of 7.9
- Respondents were once again marginally less satisfied with Cannes in terms of the value they received, giving an average rating of 7.2 (down 0.5 points since last year).
- Respondents indicated that the Cannes Film Market is the best international event held outside of Canada at meeting their needs, with the Berlin/EFM ranking second and American Film Market coming in third place.
- Participants were most satisfied with the 2008 Cannes Film Market in terms of *reconnecting with existing business contacts* (8.2 out of 10), *for their own professional development* (7.7) and *making new business contacts* (7.7).
- They were least satisfied with it in terms of *participating as a speaker on panels* (3.6 (n=5)) and *seeking financing or investing* (5.9).



# Conclusions

- Most (44-out-of-52) of the survey respondents used the services provided by the Canada Pavilion at the 2008 Cannes Film Market.
- They were very satisfied with the overall utility of the Canada Pavilion (rating their satisfaction as 8.6-out-of-10).
- More specifically, they were most satisfied with the Pavilion in terms of:
  - The location of the stand (9.0)
  - The design and appearance of the stand (8.5)
  - The helpfulness of booth staff (8.5)
- They were less satisfied with the pavilion in terms of the availability and size of meeting places. Specifically:
  - Availability of meeting spaces (7.5)
  - Size of meeting spaces (7.9)

# Conclusions

- Although attendees of the Cannes Film Market are generally more satisfied with the market itself and with the services provided by the Canada Pavilion this year, there are areas that can be identified as potential improvements.
  - Telefilm should look at ways of increasing attendance to the initiatives from the services & programming provided by the Canada Pavilion.
  - Telefilm should place more effort in increasing communication levels with new attendees in effort to increase networking across the board.
  - There is an overall appreciation for the pavilion and interest in keeping it open is very high.



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