

2008 Hong Kong Filmart Outcomes Report

Conducted by:



**For:
Telefilm Canada**

May 2008

Methodology

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- A total of 16 e-mailed invitations were sent to Canadian companies that attended the 2008 Hong Kong Filmart.
- 13 of the 16 companies clicked on the link in the e-mail invitations to go to the survey site.
- Of these 13, 13 completed all of the survey.
- The survey was open from April 8th until May 23rd , 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 16 companies



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



13 companies reached the
end of the survey

- The high response rate reflects well on the accuracy of the results but given the low number of companies invited to participate, caution should be exercised with the validity of the results.

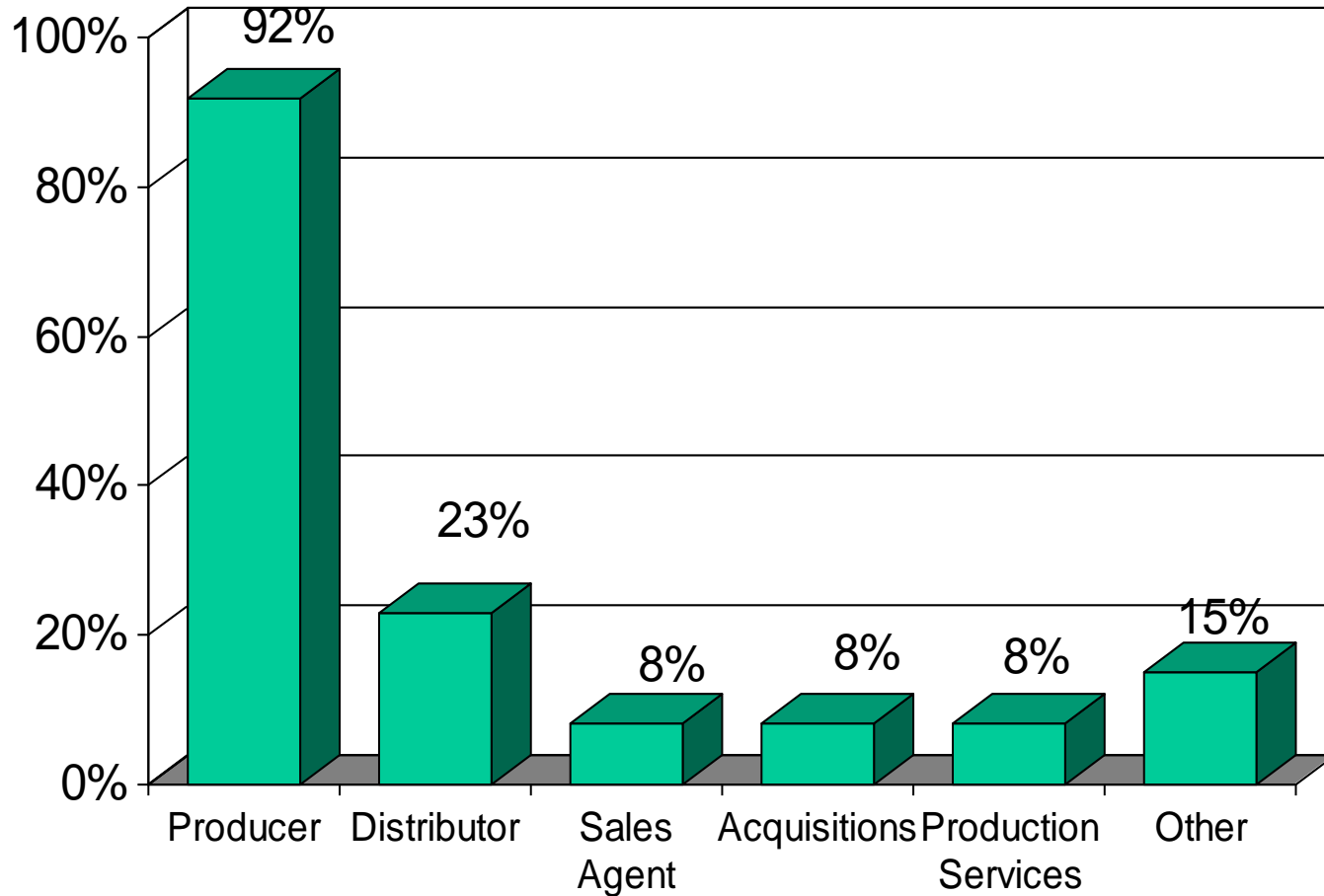
Sample and Respondents by Province

- 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
Quebec	1	0	0
Ontario	2	2	2
Saskatchewan	2	2	2
British Columbia	11	9	9
Total	16	13	13

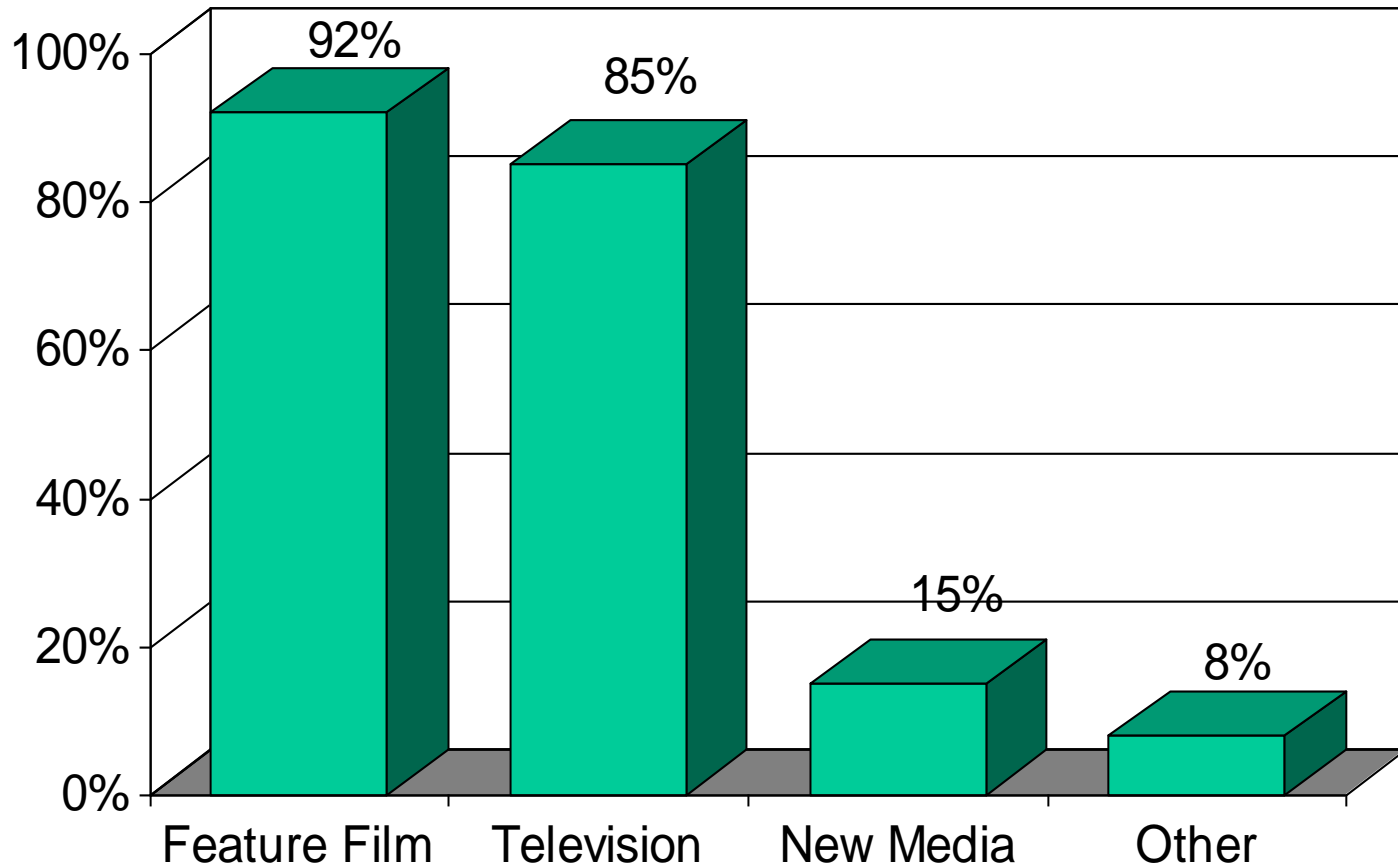
Respondent Profile

Primary Business Focus of Company



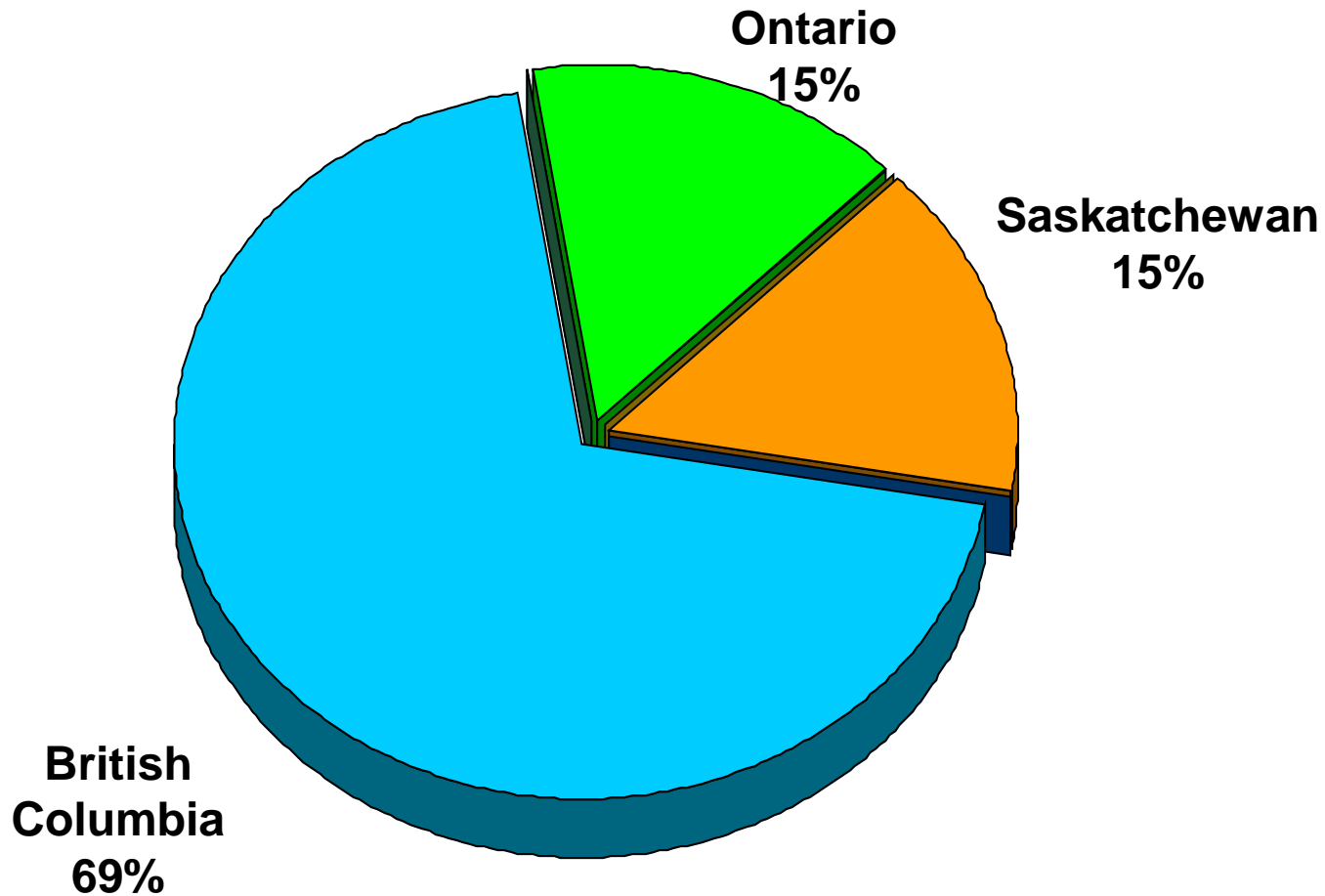
Q1. What is the primary business focus of your company? *Select all that apply.*
N=13

Main Format(s) of Interest



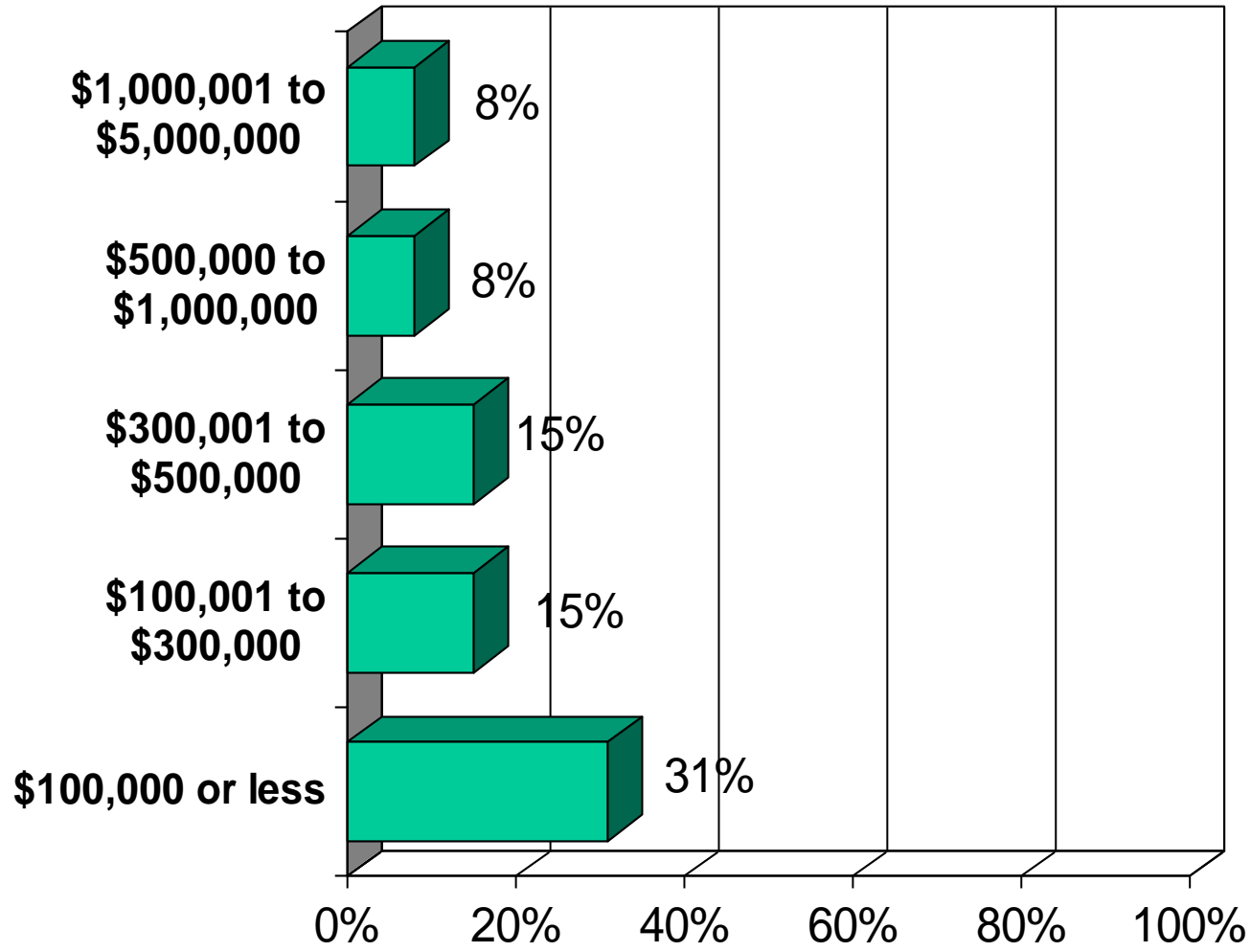
Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=13

Location of Head Office



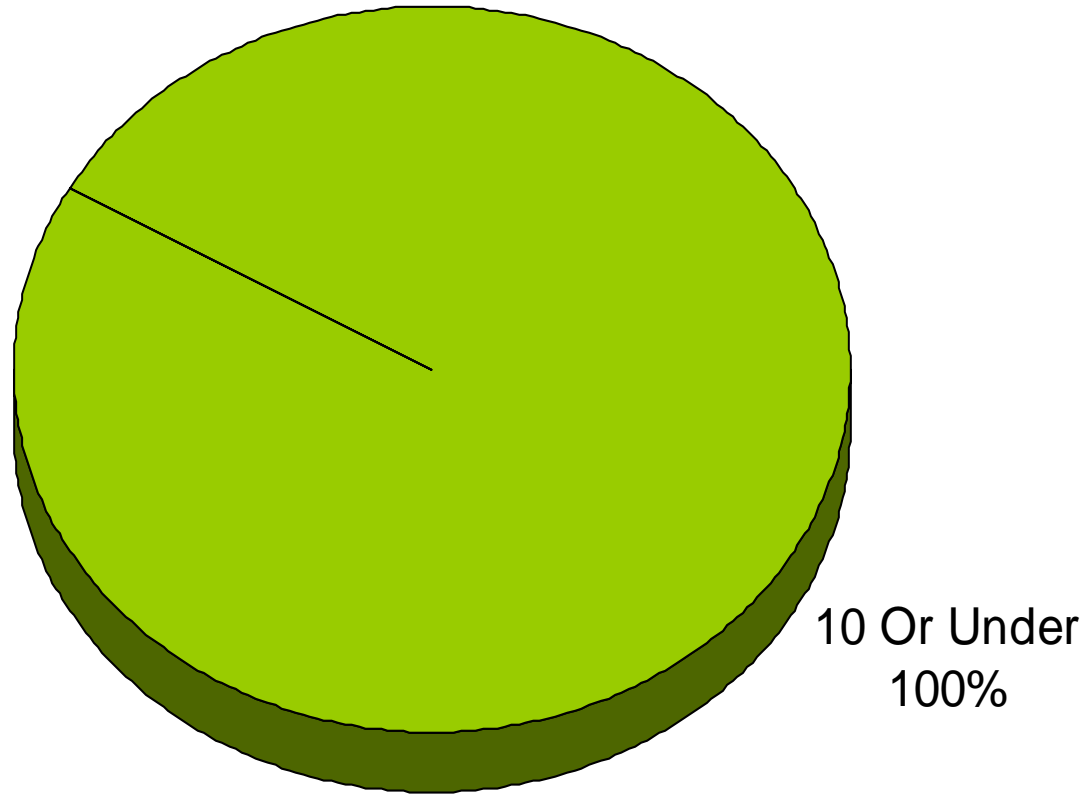
Q3. In which province/territory is your head office located? N=13

Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?
N=13

Number of Employees



Q5. How many full-time employees are there currently in your company?
N=13

The Film Market

Genres and Formats Companies were interested in Selling and/or Pre-Selling at 2008 Hong Kong Filmart

	Genre	Feature Film	Television	New Media
Drama	62%	54%	38%	0%
Horror/Thriller	23%	23%	8%	0%
Comedy	15%	15%	15%	0%
Action/Adventure	54%	54%	46%	8%
Science Fiction	8%	8%	8%	0%
Documentary/Educational	62%	46%	54%	15%
Animation	23%	23%	23%	0%
Romantic	8%	8%	8%	0%
Children's Programming	15%	8%	15%	0%
Sports	8%	8%	8%	0%
Performing Arts	15%	0%	8%	0%
Other	8%	8%	8%	8%

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

N=13

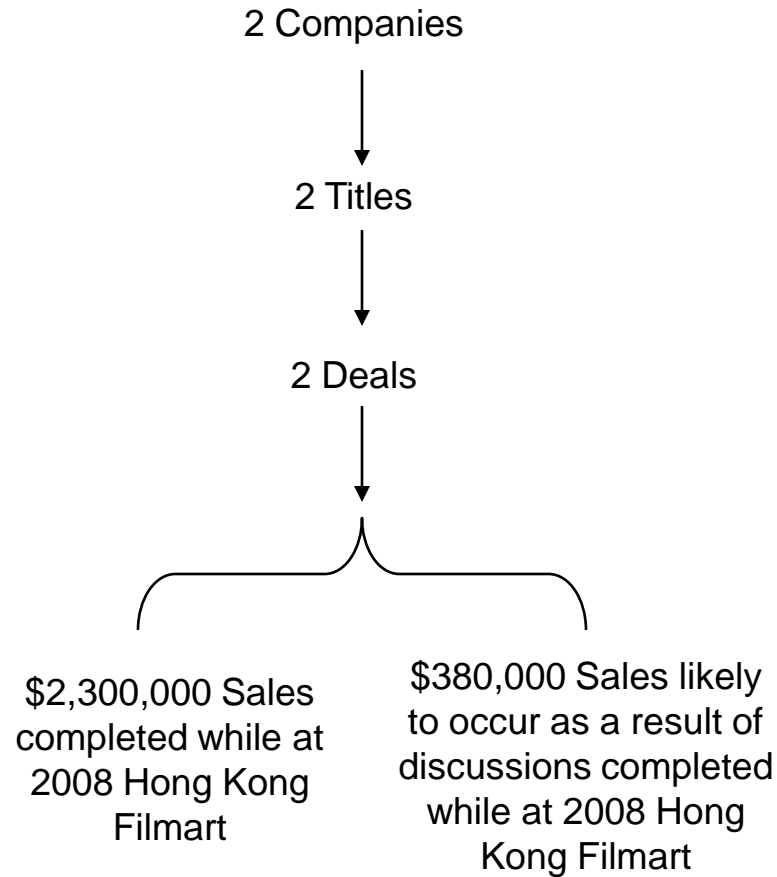
Q7. For each of the programming genre(s) of interest to your company, what was the type of media? N=13

Sales/Pre-Sales

- 6 companies indicated that they either completed sales while at the Hong Kong Filmart or began discussions that are likely to lead to sales while at Hong Kong Filmart.
- 3 companies indicated that they either completed pre-sales while at the Hong Kong Filmart or began discussions that are likely to lead to pre-sales.
- Of these, 2 companies provided information on 2 deals involving 2 titles.
- One company reported that 1 distribution agreement was signed.
- Respondents reported that \$2.3 million of sales were completed while at the 2008 Hong Kong Filmart and that \$380,000 worth of sales are likely to occur as a result of discussions initiated at the market.
- Companies did not report any completed presales or likely presales at the 2008 Hong Kong Filmart.

Breakdown of Sales and Pre-Sales Deals

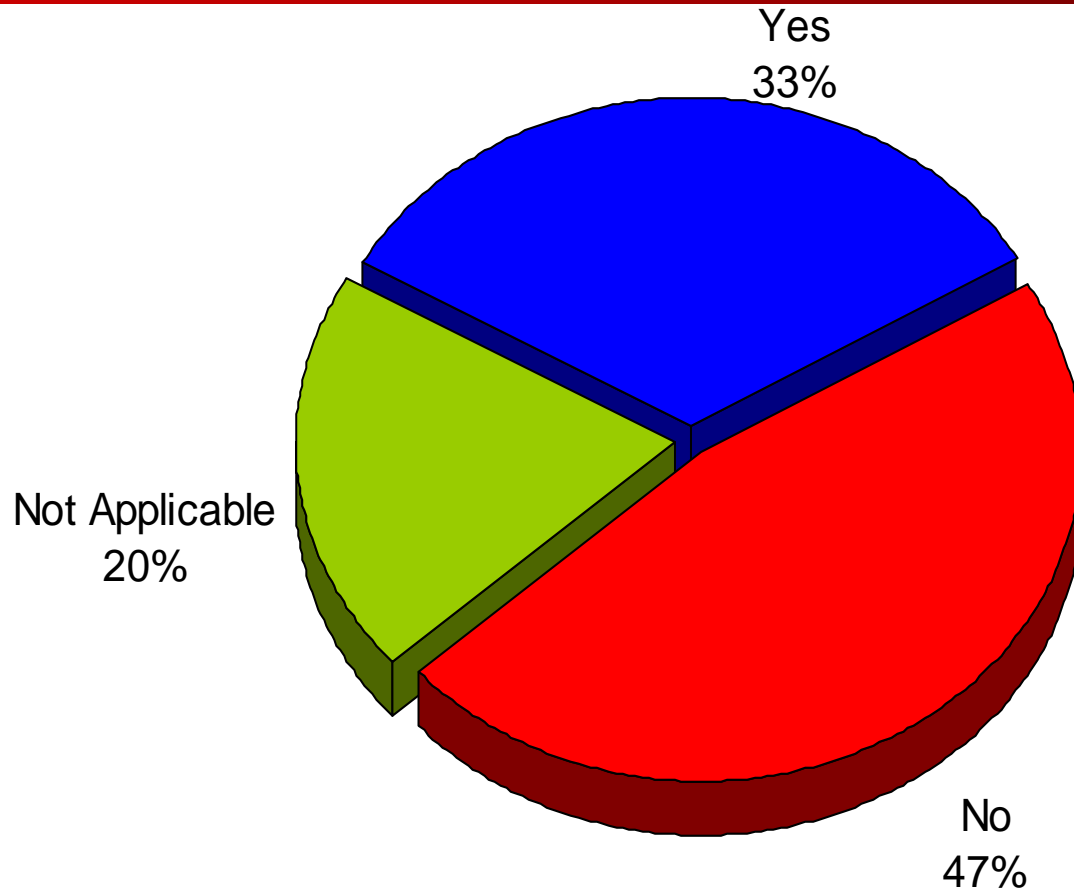
Sales/Likely Sales



Pre-Sales

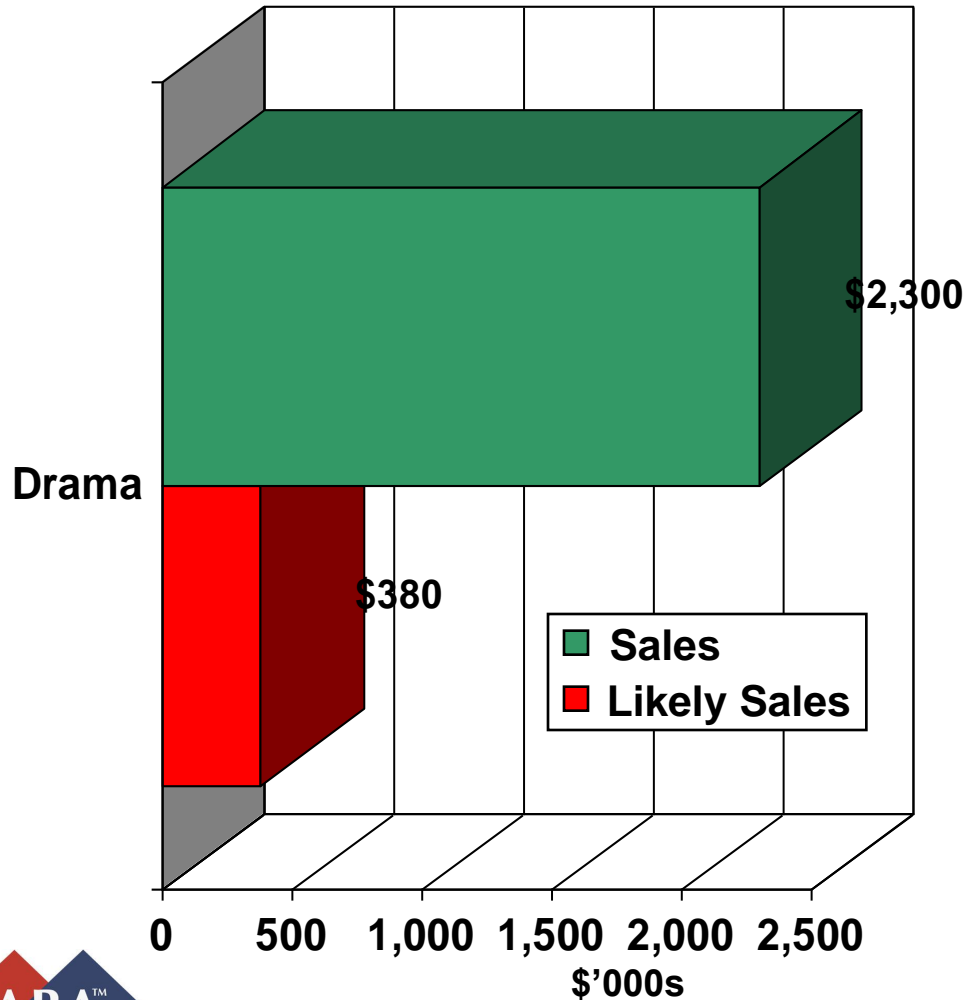
No information provided

Sales



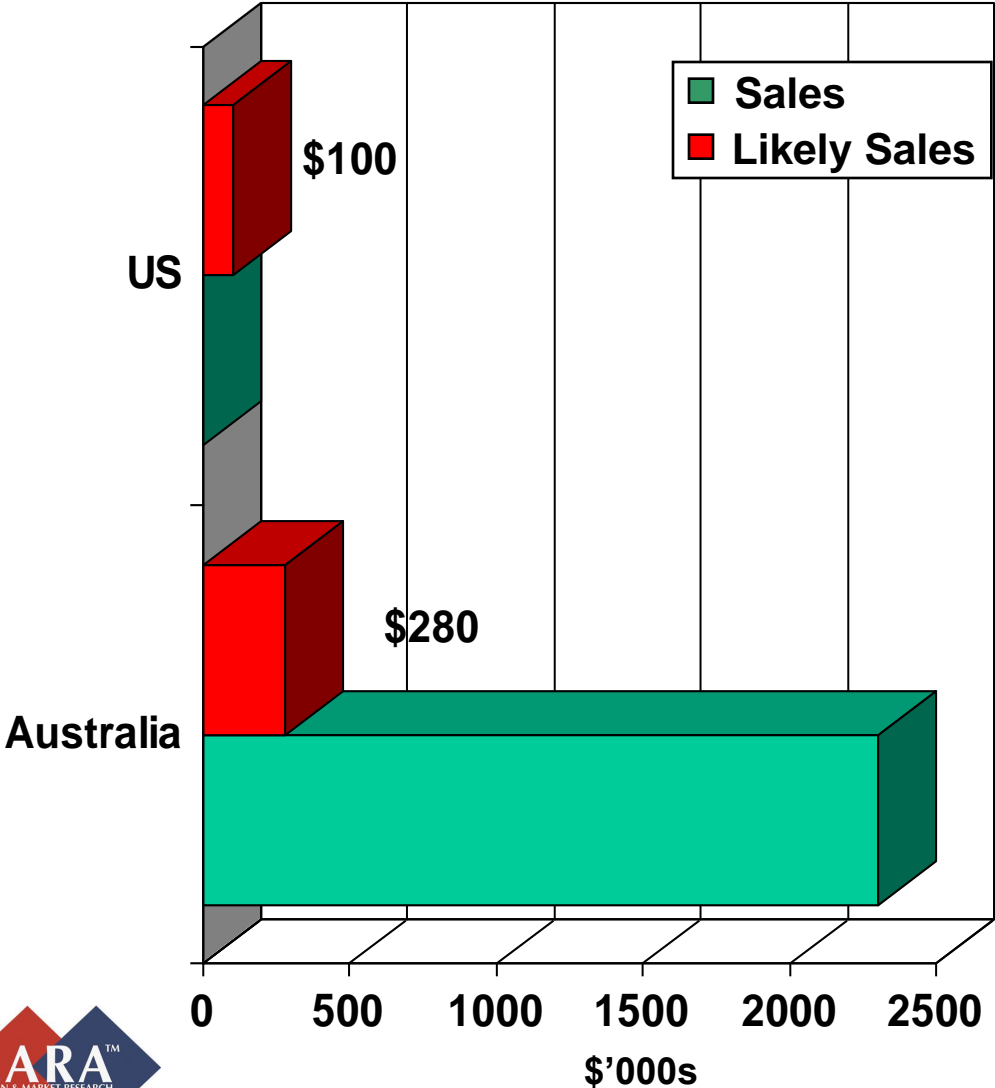
Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at the 2008 Hong Kong Filmart? N=13

Breakdown of Sales and Likely Sales by Genre



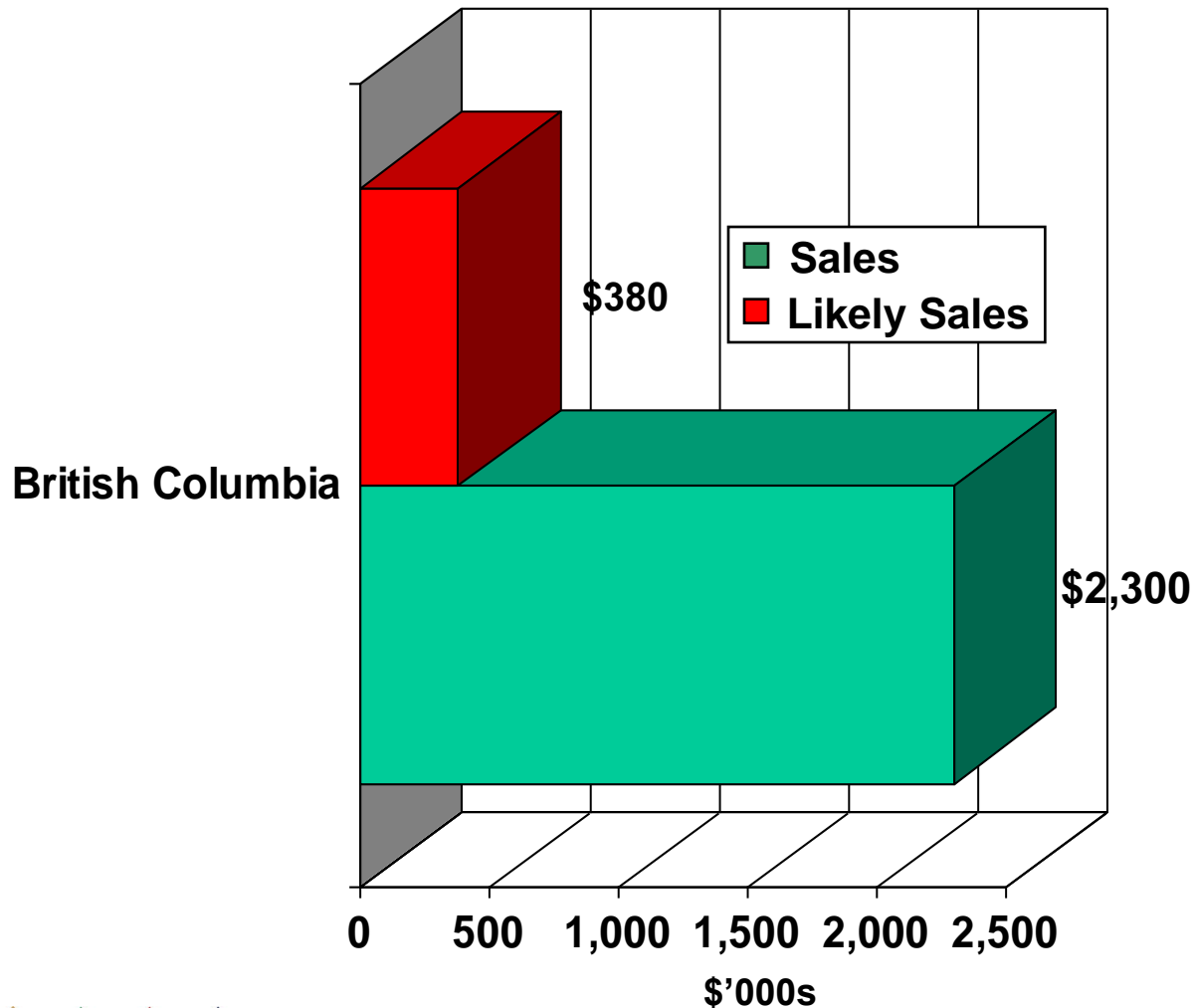
Companies	Titles	Deals
2	2	2

Breakdown of Sales & Likely Sales by Country



Companies	Titles	Deals
1	1	1
1	1	1

Breakdown of Sales and Likely Sales by Company Region



Companies	Titles	Deals
2	2	2

Co-Production and Co-Venture Deals

- 4 companies (31% of those who answered the question) indicated that they either signed, or began negotiating co-production or co-venture deals while at the 2008 Hong Kong Filmart.
- All 4 companies provided information about the number of co-production or co-venture deals - and reported a total of 11 deals.
- All 4 companies provided information about the value of co-production or co-venture deals - and reported that the deals were worth \$41,300,000.
- Once again, all 4 companies provided information about the countries with which deals were made.
- Respondents reported that they participated in an average of 23 business meetings each while at the 2008 Hong Kong Filmart.

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	1	\$3,000,000	China
2	1	\$13,000,000	Canada, Asia
3	2	\$300,000	China, Germany, Korea(South), Philippines
4	3	\$25,000,000	China, Singapore, UK, USA

Co-Production and Co-Venture Deals by Company Region

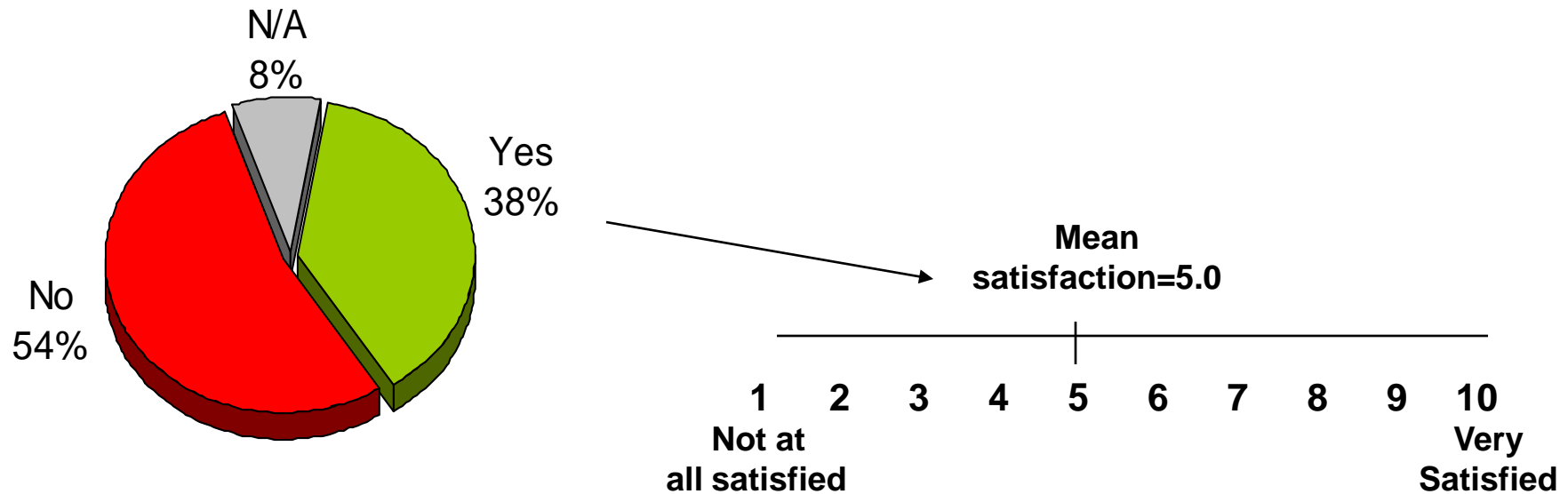
Region	Number of companies	Q9b - Number of co-production or co-venture deals	Q9c - Estimated Value of deals to company
British Columbia	2	4	\$28,000,000
Ontario	2	3	\$13,300,000

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 the 2008 Hong Kong Filmart?

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

Title Screening

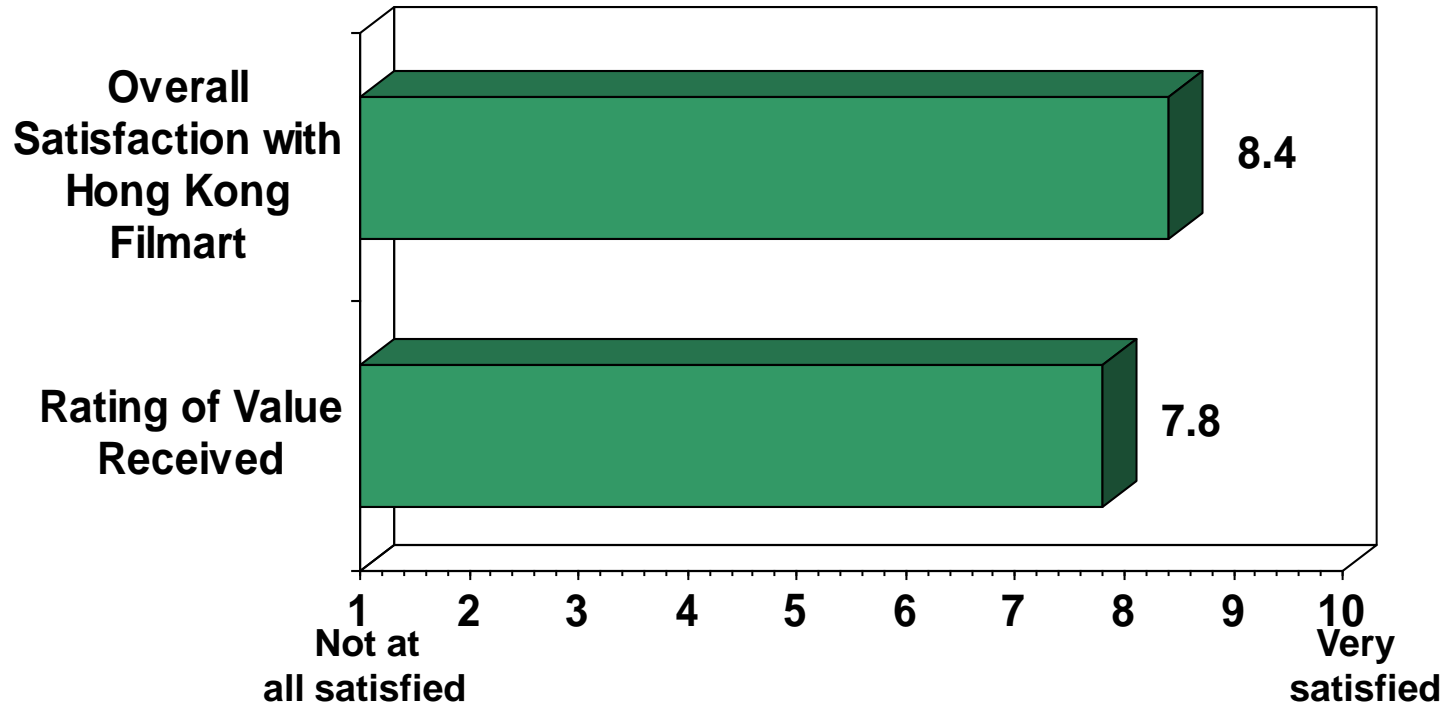
- 5 respondents (38%) indicated that they had a title screened at the 2008 Hong Kong Filmart.
- These respondents gave an average satisfaction score of 5.0 for the visibility their titles received from the screenings.



Q11. Were any of your titles screened at the 2008 Hong Kong Filmart? (n=13)

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=5)

Overall Satisfaction With, and Value of, 2008 Hong Kong Filmart

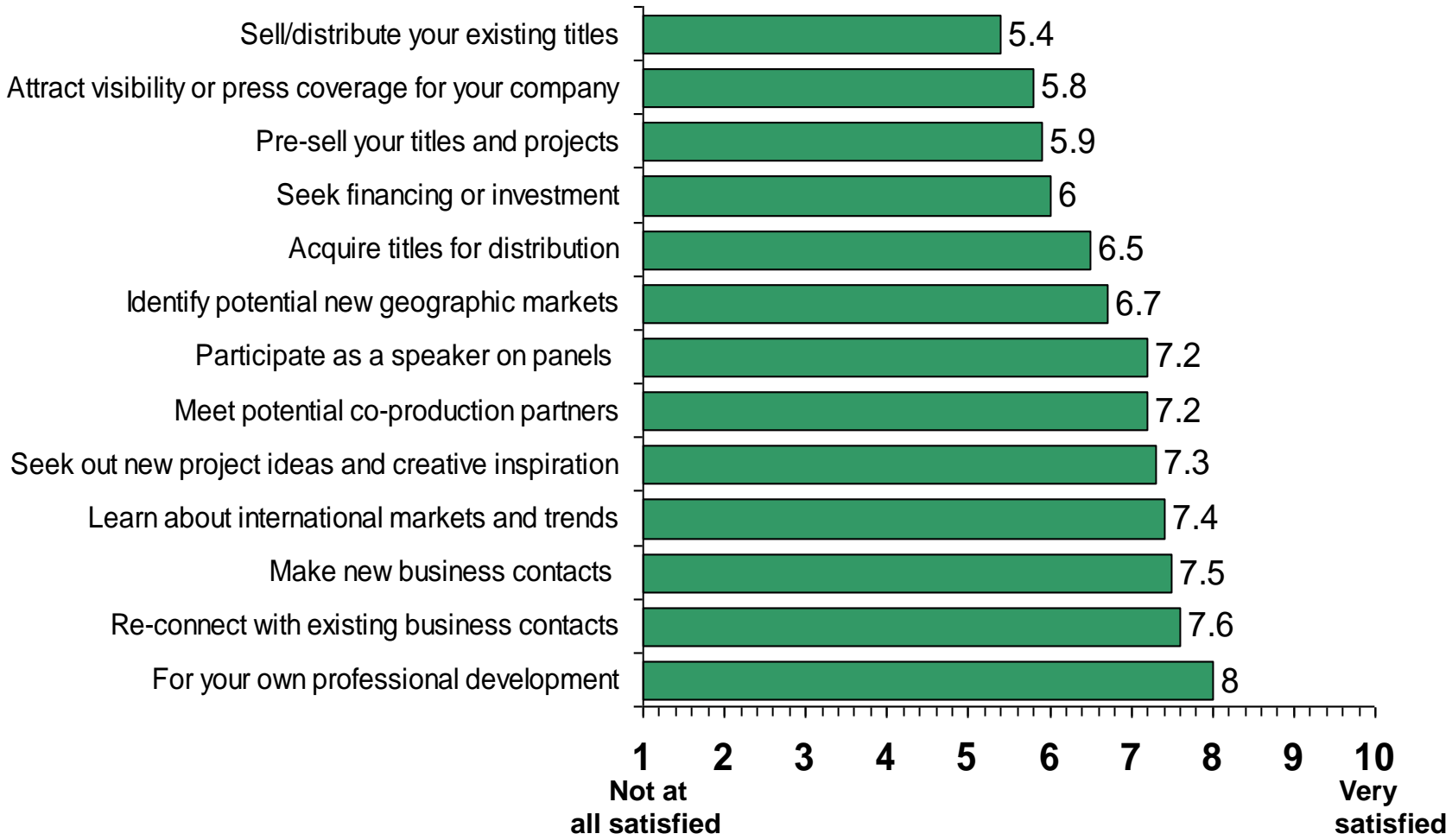


Q13a. How satisfied would you say you were overall with the 2008 Hong Kong Filmart in terms of facilities provided, meeting potential contacts, support, etc...? Using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied.

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

N=13

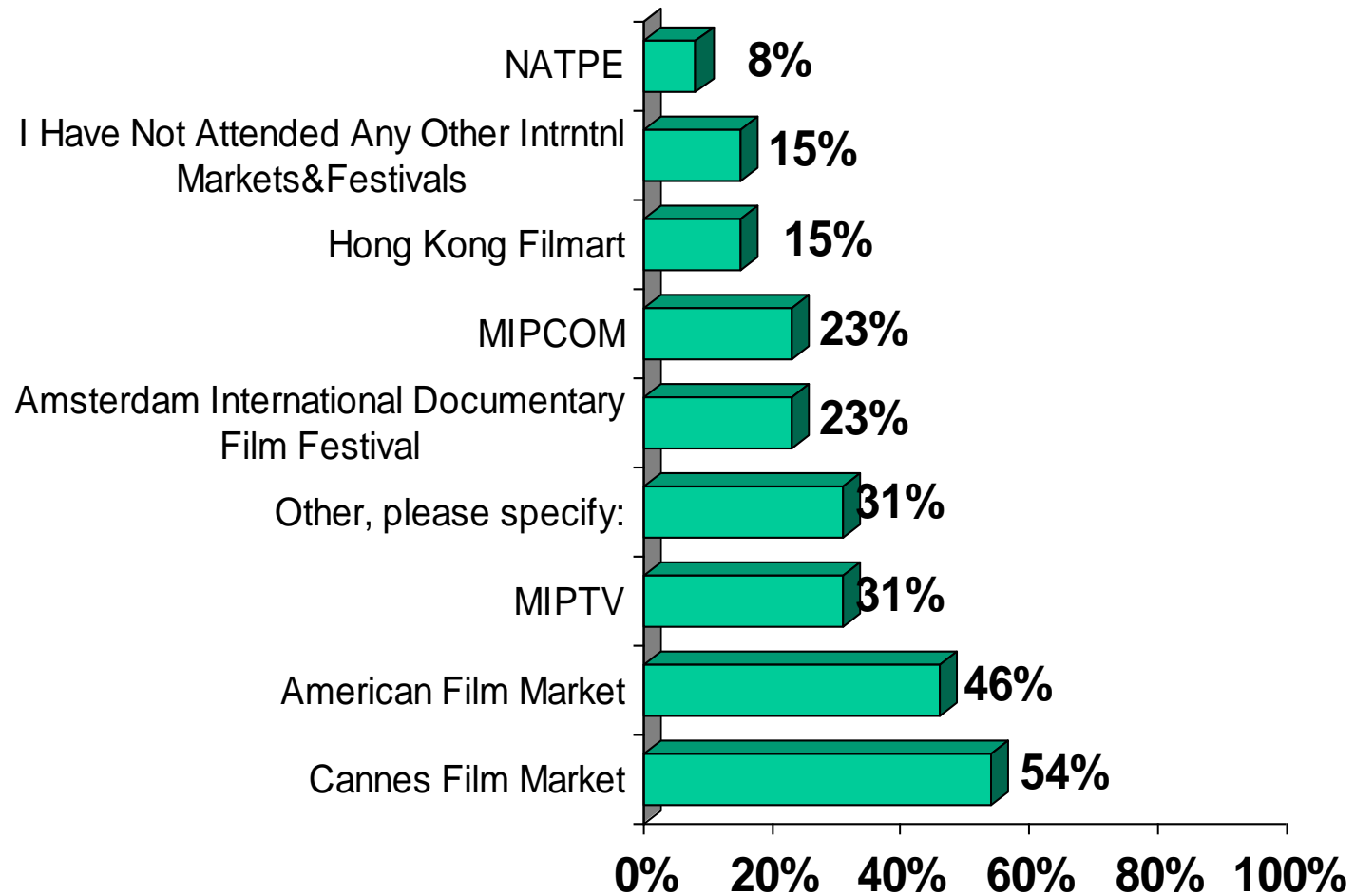
Satisfaction with 2008 Hong Kong Filmart



Q13c. How satisfied were you with the 2008 Hong Kong Filmart 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”.

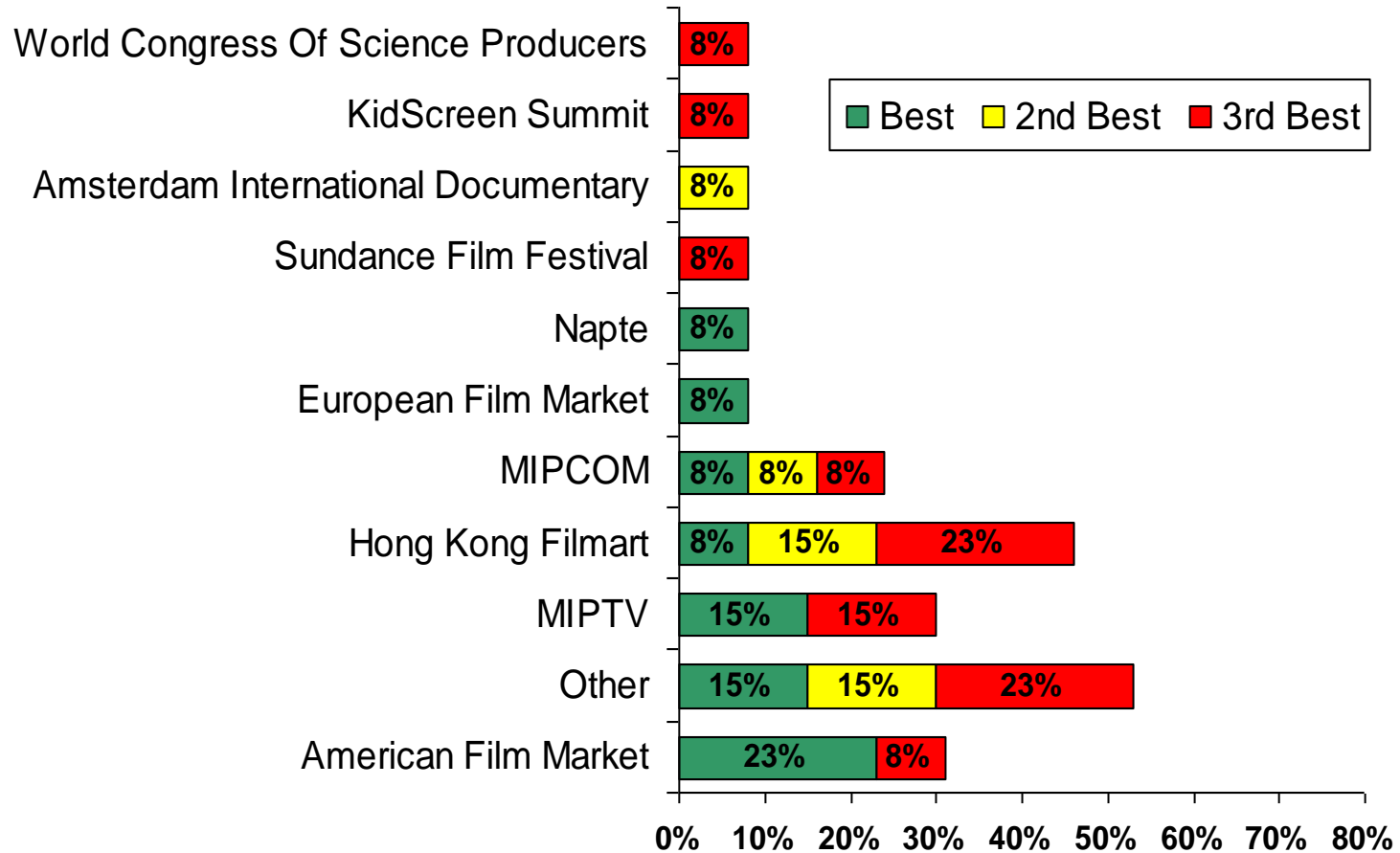


International Markets & Festivals Attended



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=13

Rating of International Festivals & Markets

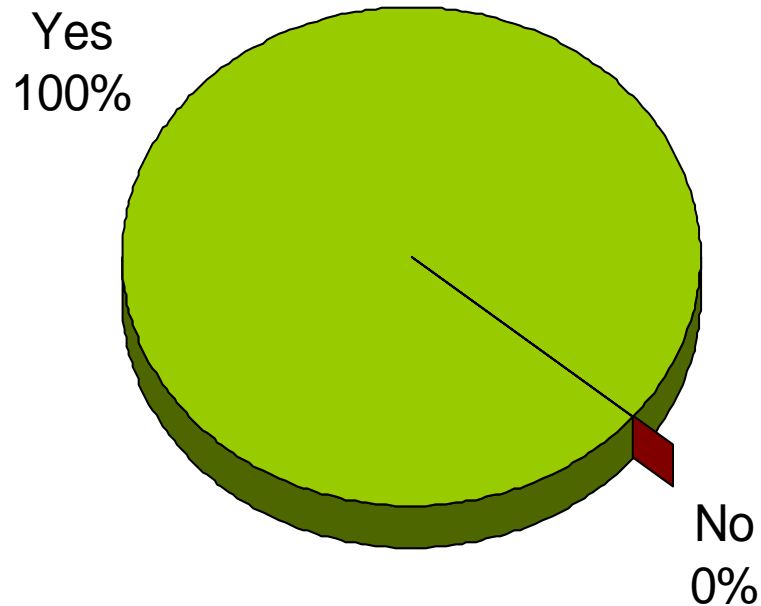


Q15a,b,c Thinking of the European Film Market together with the other major international events held outside of Canada, which one best meets your needs, is second best at meeting your needs, is third best at meeting your needs?

N=13

Used Services of Canada Pavilion?

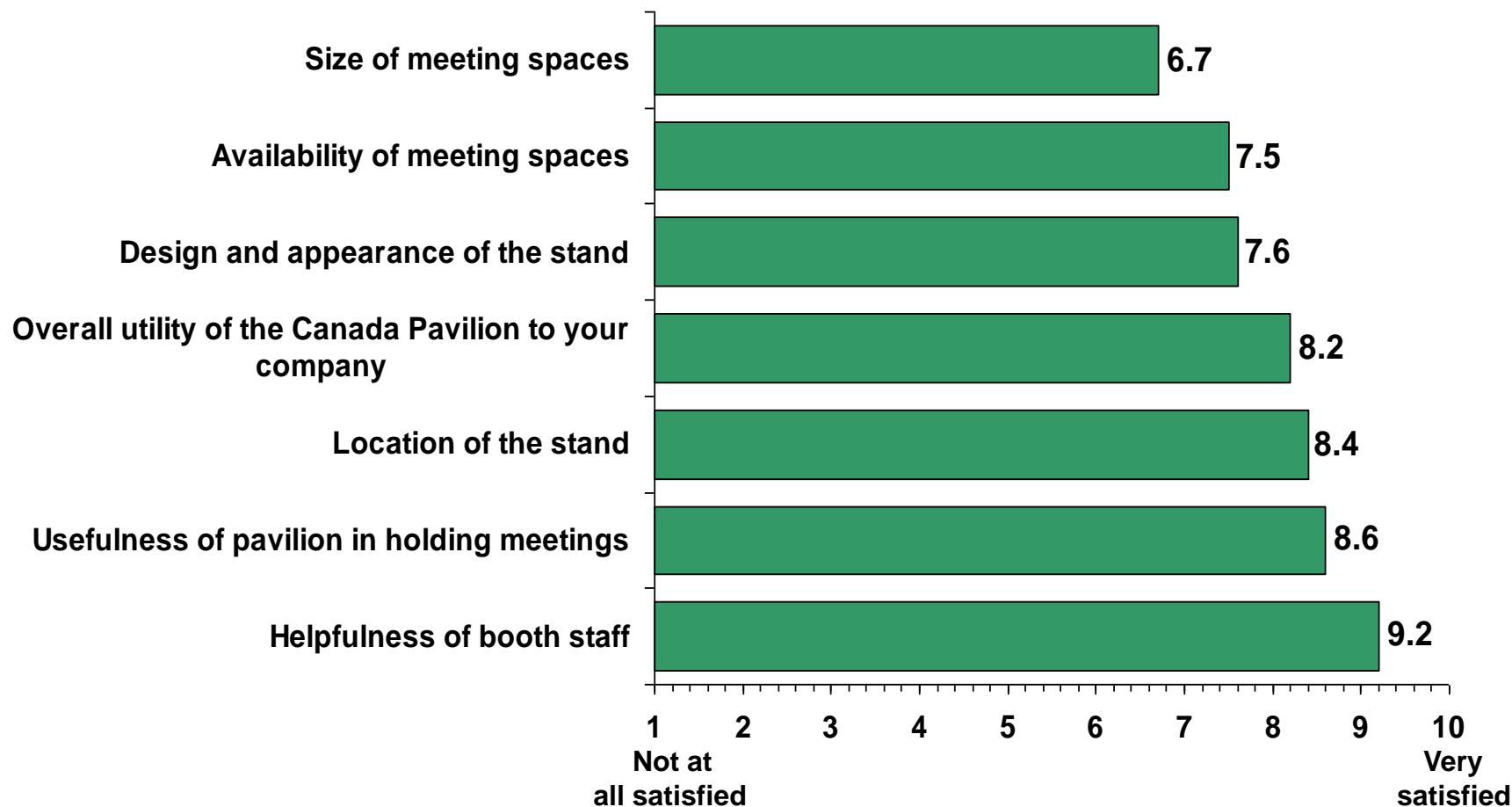
Used Canada Pavilion?



Q17 Did you use the services provided by the Canada Pavilion at the 2008 Hong Kong Filmart? N=13

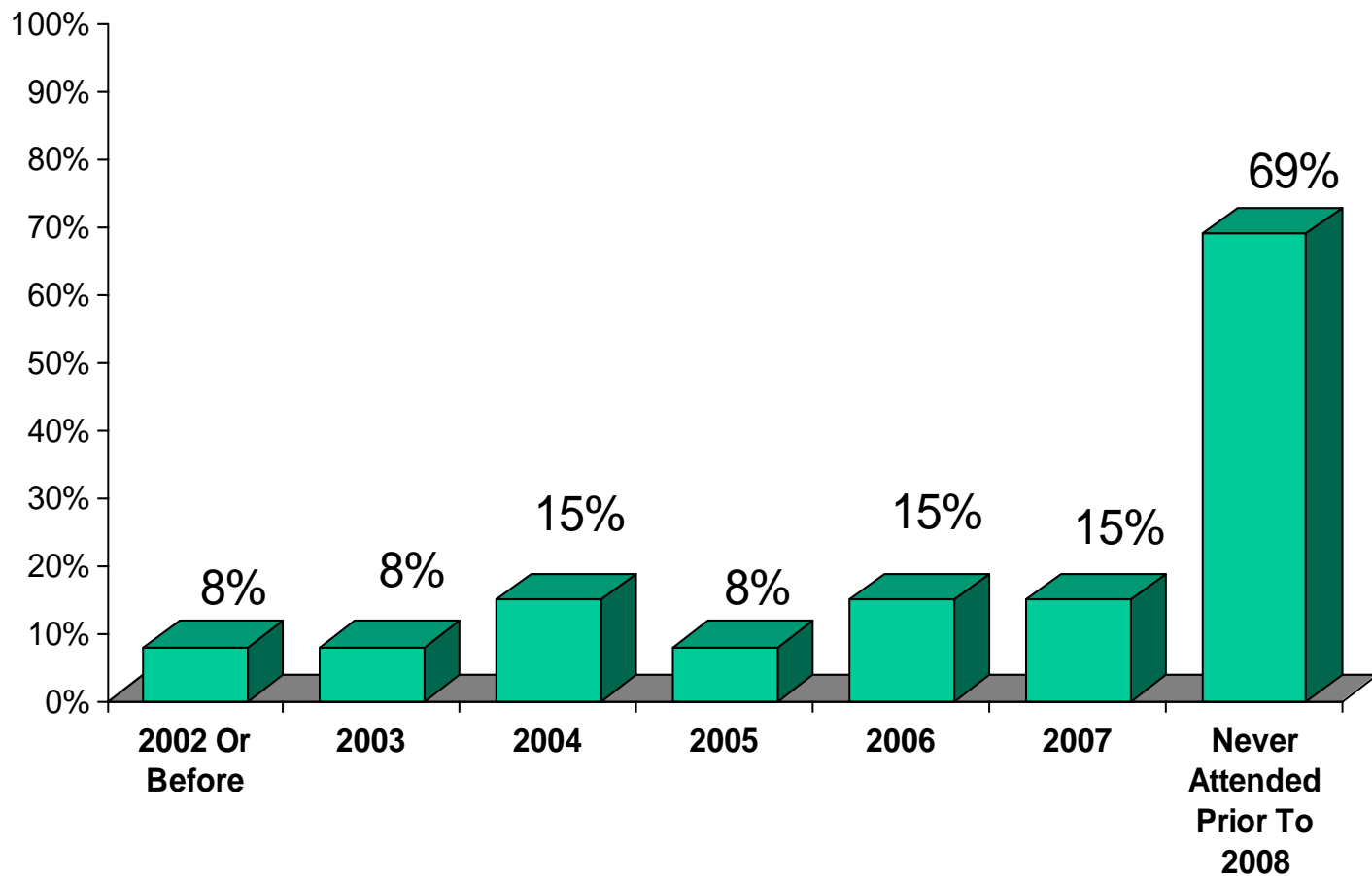
Q18 (IF "NO" TO Q17) Why didn't you use the services provided at the Canada Pavilion? N=0

Satisfaction with Canada Pavilion



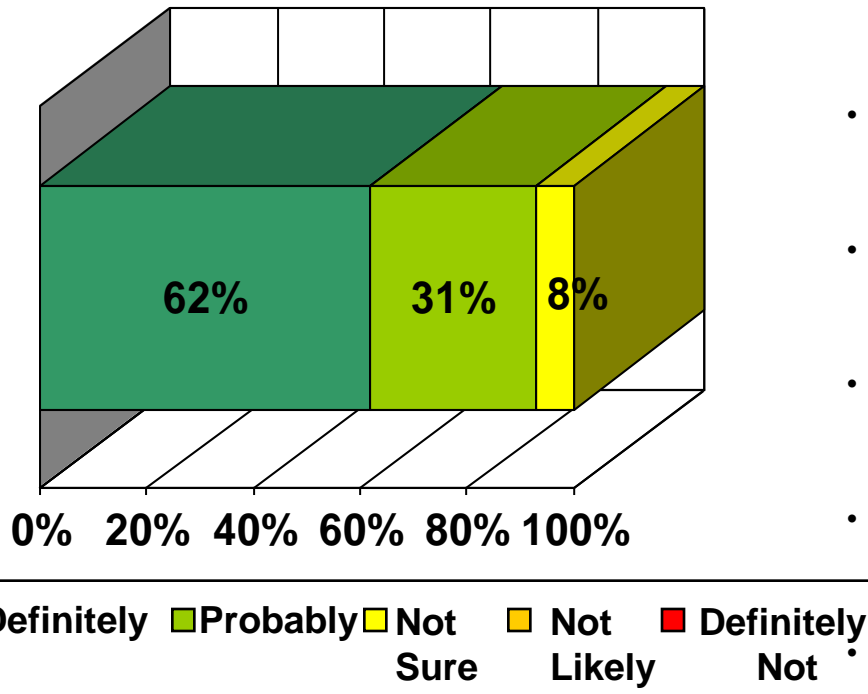
Q19 (THOSE WHO DID USE THE CANADA PAVILION) Please rate your level of satisfaction with each of the following aspects of the Canada Pavilion at the 2008 Hong Kong Filmart using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. If a particular item does not apply, select "not applicable." N= 13

Past Attendance at Hong Kong Filmart



Q21. Which previous Hong Kong Filmart events, if any, has your company attended? *Select all that apply*
N=13

Likelihood of, and Reasons for, Recommending Hong Kong Filmart to Others



- *“I would recommend FILMART to companies who are looking to work more with Asia, sell projects into Asia, work in new media or just learn more about the markets in the area .”*
- *“Great access to Asian, European and American companies that are quite difficult to access at the other international markets.”*
- *“HK Filmart was a great way to gain an understanding of the Asian markets and good way of raising our company profile.”*
- *“You need to have a set itinerary, have Asian centred material, be able to do business in china and have the ability to pull it off.”*
- *“Markets are applicable to some companies, but not all. China is a difficult country to co-operate with, if they think they will enter China, it will take many years.”*
- *“I think that attending the HKFilmart was a great experience with a lot of potential for sales and business.”*
- *“The Asian market is becoming significant, China, Singapore and in particular Hong Kong, with new film investment fund. With Hong Kong and Mainland co-producers Canadian producers have a new opportunity to create product for world market.”*

Q22a. Would you recommend the Hong Kong Filmart to other companies in the Canadian audio-visual industry? N=13

Q22b. Please explain your answer. N= 11

Cost of Attending Hong Kong Filmart 2008

- Companies incurred an average cost of \$4,643 in attending the 2008 Hong Kong Filmart.
- 62% of respondents (8 companies) indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend the event.
- None of the companies reported receiving federal funding.
- Eight companies indicated that they had received provincial funding ranging in amount from \$1,500 to \$3,500. The median amount was \$1,188.

Conclusions

Conclusions

- It appears that participants at Hong Kong Filmart did enjoy a successful market:
- Just under half of respondents (46%) either completed sales, or began discussions that are likely to lead to sales while at the event.
- Two companies either completed pre-sales, or began discussions that are likely to lead to pre-sales.
- One quarter (25%) of respondents either signed or began negotiating co-production or co-venture deals.
- \$2,300,000 of actual sales, and \$380,000 of likely sales and pre-sales, and \$41,300,000 of co-production or co-venture deals were reported by survey participants.

Conclusions

- Interestingly, respondents were very satisfied with the Hong Kong Filmart, giving an overall satisfaction rating of 8.4 out of 10, and rating value for money as 7.8 out of 10.
- However, satisfaction scores by individual component were lower across all areas. Participants were most satisfied with the 2008 Hong Kong Filmart in the following areas:
 - Opportunities for professional development (8.0 out of 10)
 - Reconnecting with existing business contacts (7.6 out of 10)
- Participants were least satisfied with selling and/or distribution of existing titles (5.4 out of 10).
- In terms of comments reflecting lower component satisfaction scores, there were 2 comments, previously mentioned. One referred to minimal Telefilm staff presence and included a reference to Telefilms' lack of understanding of this market. The second comment also corroborated this statement.

Conclusions

- All respondents used the services provided by the Canada Pavilion at the 2008 Hong Kong Filmart.
- They were very satisfied with the overall utility of the Canada Pavilion (rating their satisfaction as 8.2 out of 10).
- More specifically, they were most satisfied with it in terms of:
 - The helpfulness of booth staff (9.2)
 - The usefulness of Pavilion in holding meetings (8.6)
 - The location of the stand (8.4)
- They were less satisfied with the stand in terms of being able to conduct meetings there. Specifically:
 - Size of meeting spaces (6.7)

Conclusions

- Participants expressed a need for designated tables per company, as well as additional space per each attending company (e.g., to display marketing materials).
- Other suggestions:
 - Private meeting spaces
 - Bilingual reception



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