

NATPE 2008 - Outcomes Report

Conducted by:



April 2008

Methodology

- A total of 6 e-mail invitations were sent to Canadian companies that attended NATPE 2008.
- 6 of the 6 companies clicked on the link in the e-mail invitations to go to the survey site.
- These 6 companies completed all of the survey
- The survey was open from February 21 until April 10, 2008.
- During the course of the survey, non-responding companies were contacted by e-mail or telephone to encourage participation.
- Please note that due to a very small sample size (N=6), the results should be used for directional purposes only

Methodology

E-mail invitations sent to 6 companies



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



6 companies reached the end
of the survey

Sample and Respondents by Province

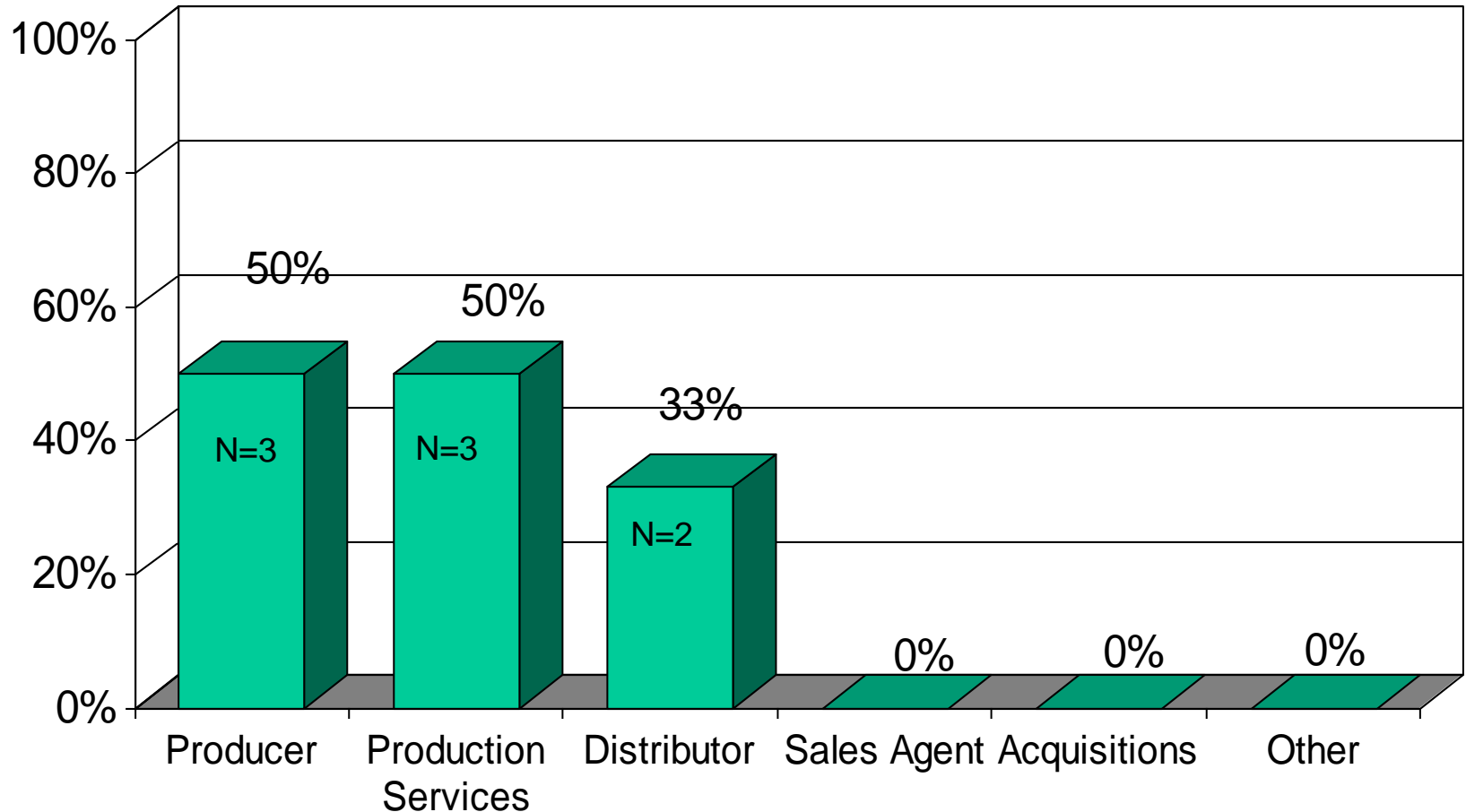
➔ Broken down by province, the sample consisted of the following companies:

Province	Companies in sample	Companies starting survey	Companies completing survey
Ontario	4	4	4
Alberta	1	1	1
Quebec	1	1	1
Total	6	6	6

Respondent Profile

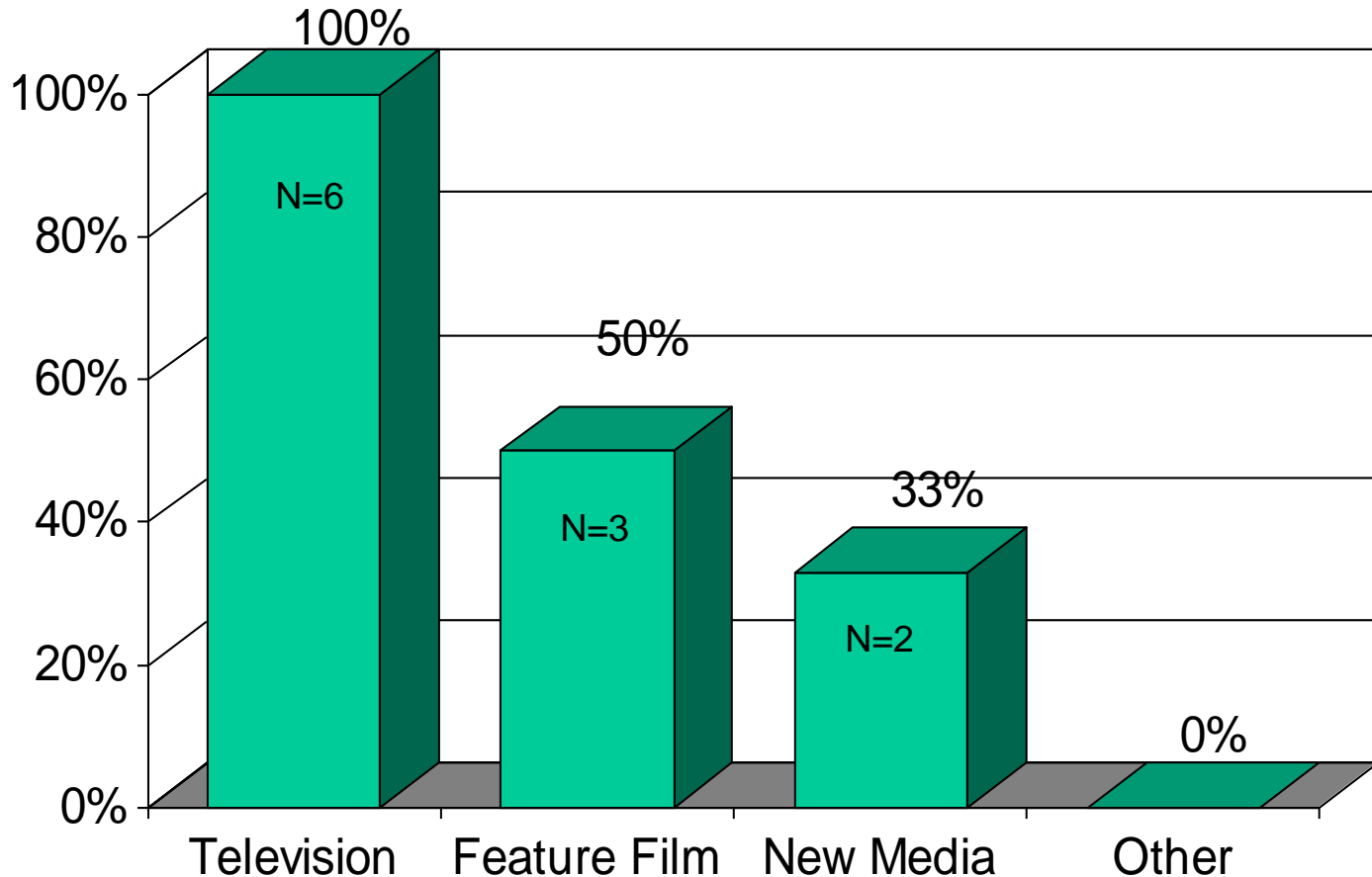


Primary Business Focus of Company



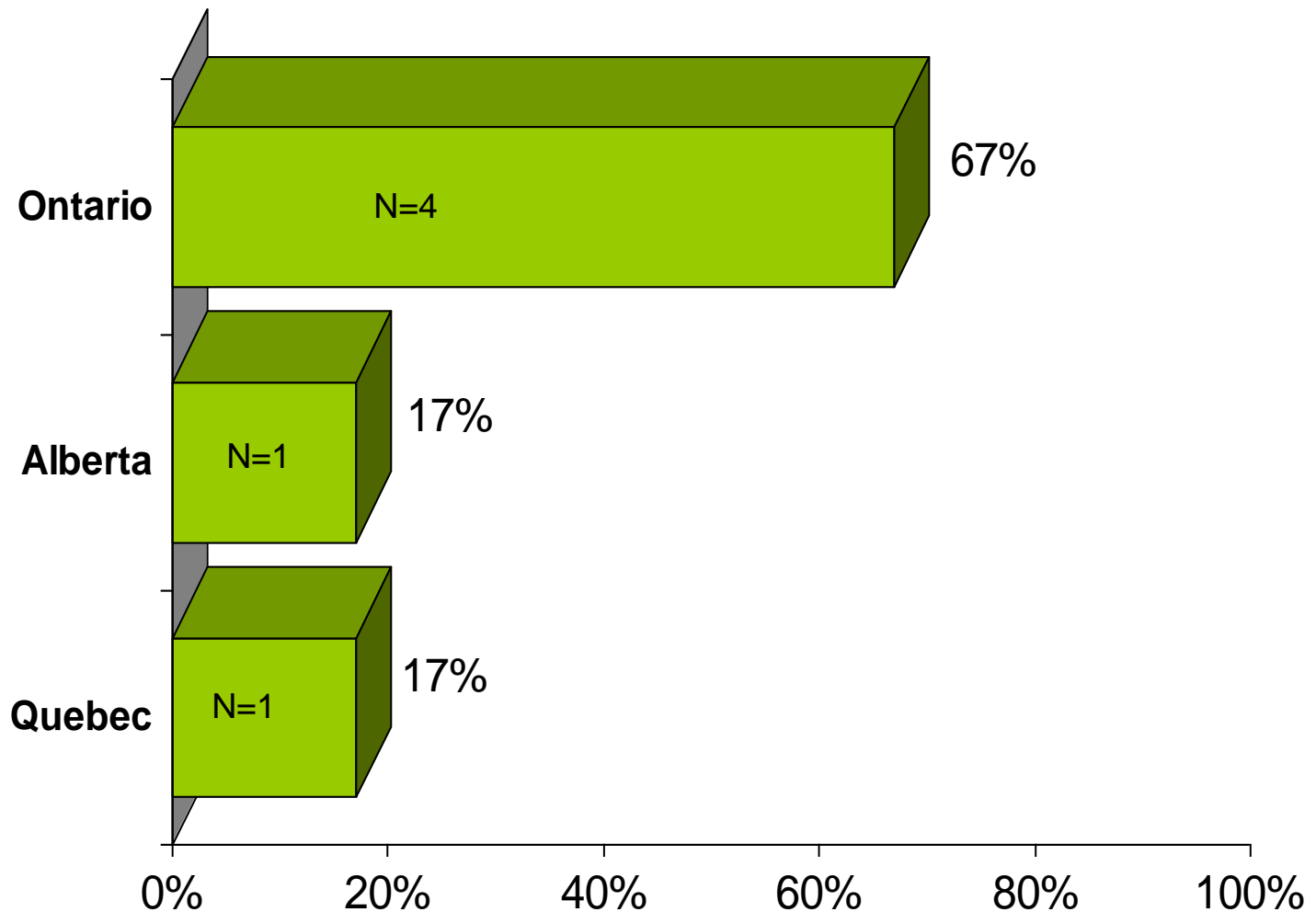
Q1. What is the primary business focus of your company? *Select all that apply.*
N=6

Main Format(s) of Interest



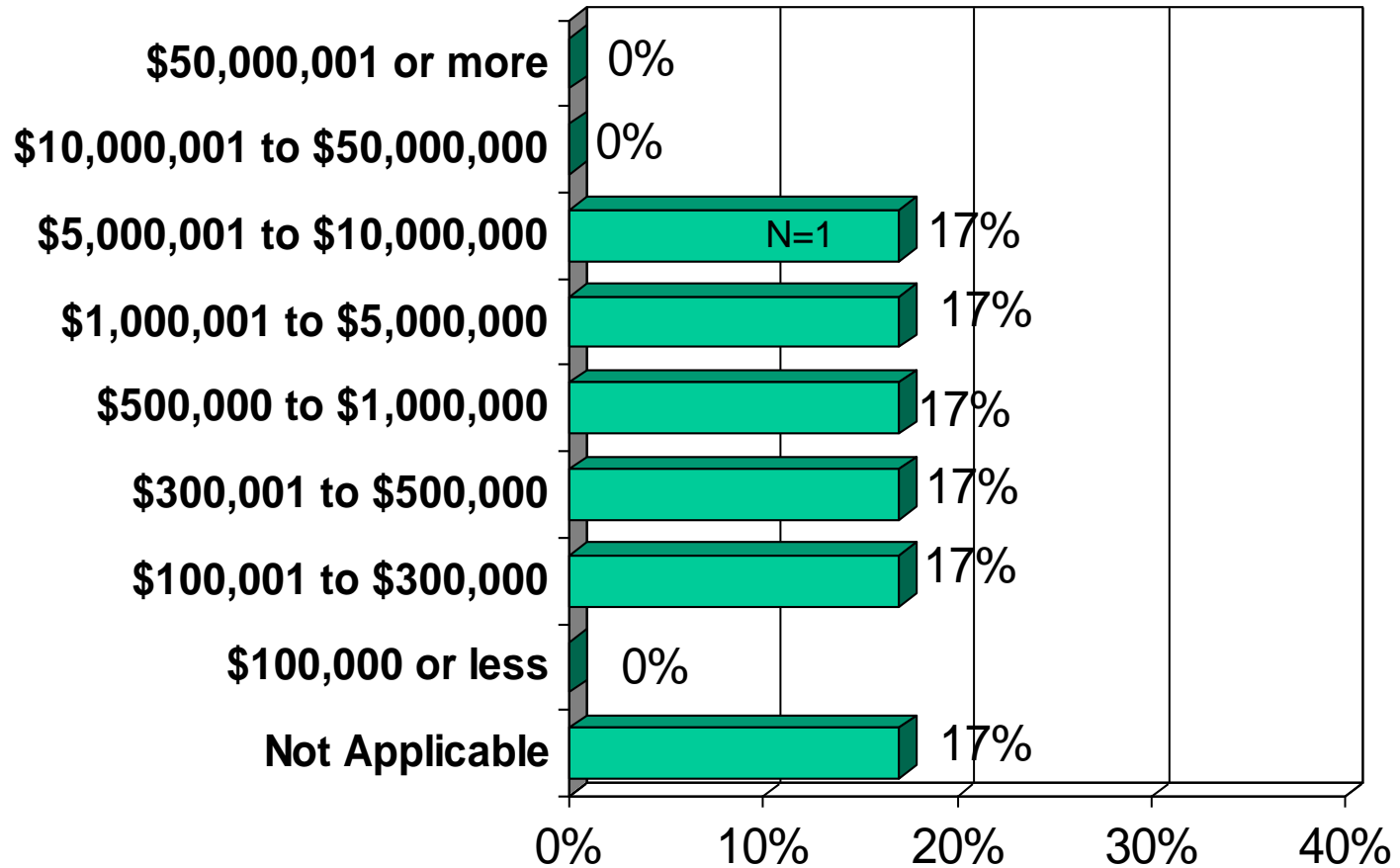
Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=6

Location of Head Office



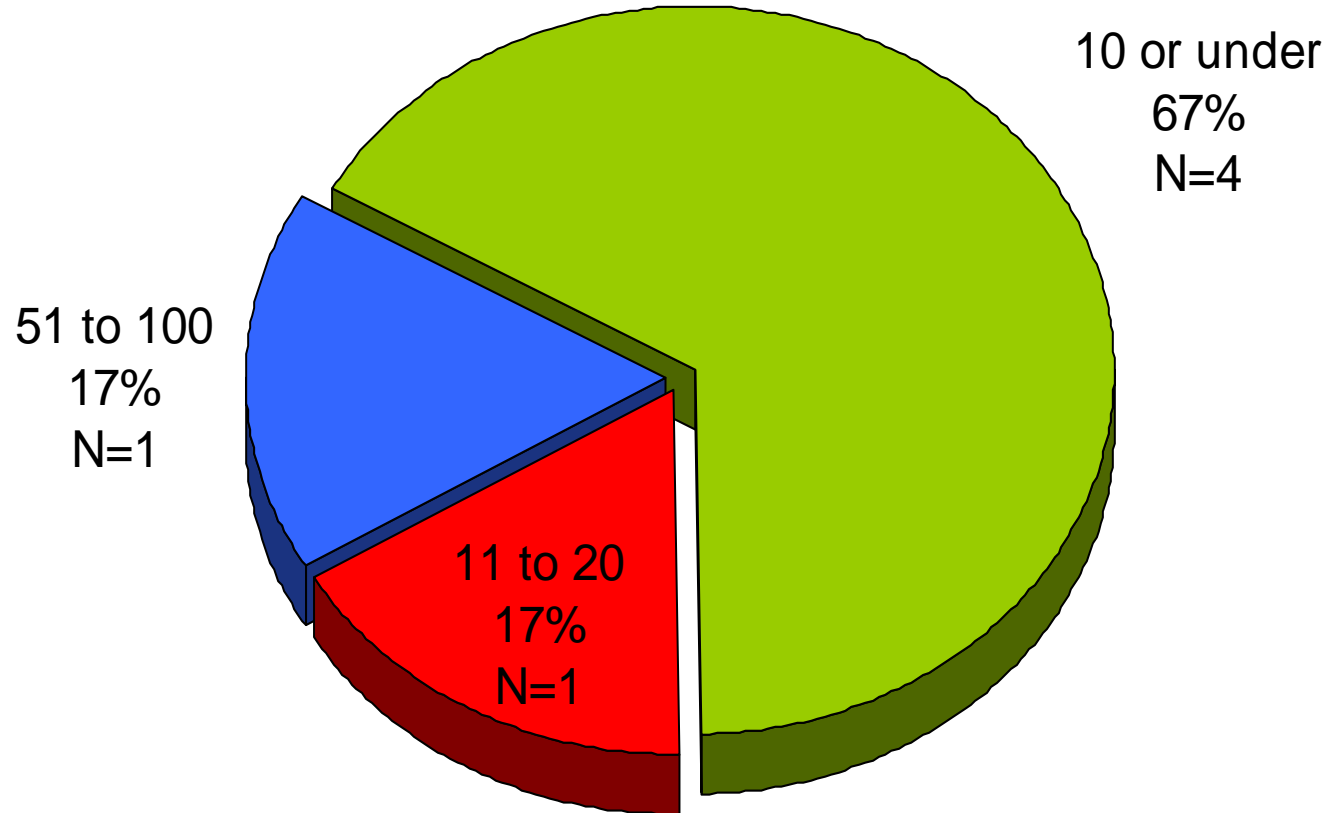
Q3. In which province/territory is your head office located?
N= 6

Company Revenues



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

Number of Employees



Q5. How many full-time employees are there currently in your company?
N=6

The Market



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

	Television	New Media	Feature Film
Documentary/educational	67%	0%	17%
Children's Programming	50%	0%	17%
Drama	50%	0%	33%
Lifestyle	67%	17%	17%
Reality	50%	0%	17%
Animation	50%	17%	33%
Comedy	17%	0%	17%
Action/Adventure	33%	0%	17%
Performing Arts	33%	0%	17%
Sports	33%	0%	17%
Horror/Thriller	17%	0%	17%
Public Affairs	17%	0%	17%
Science Fiction	17%	0%	17%
Romantic	17%	0%	17%
Erotica	7%	0%	0%
Other	0%	0%	0%



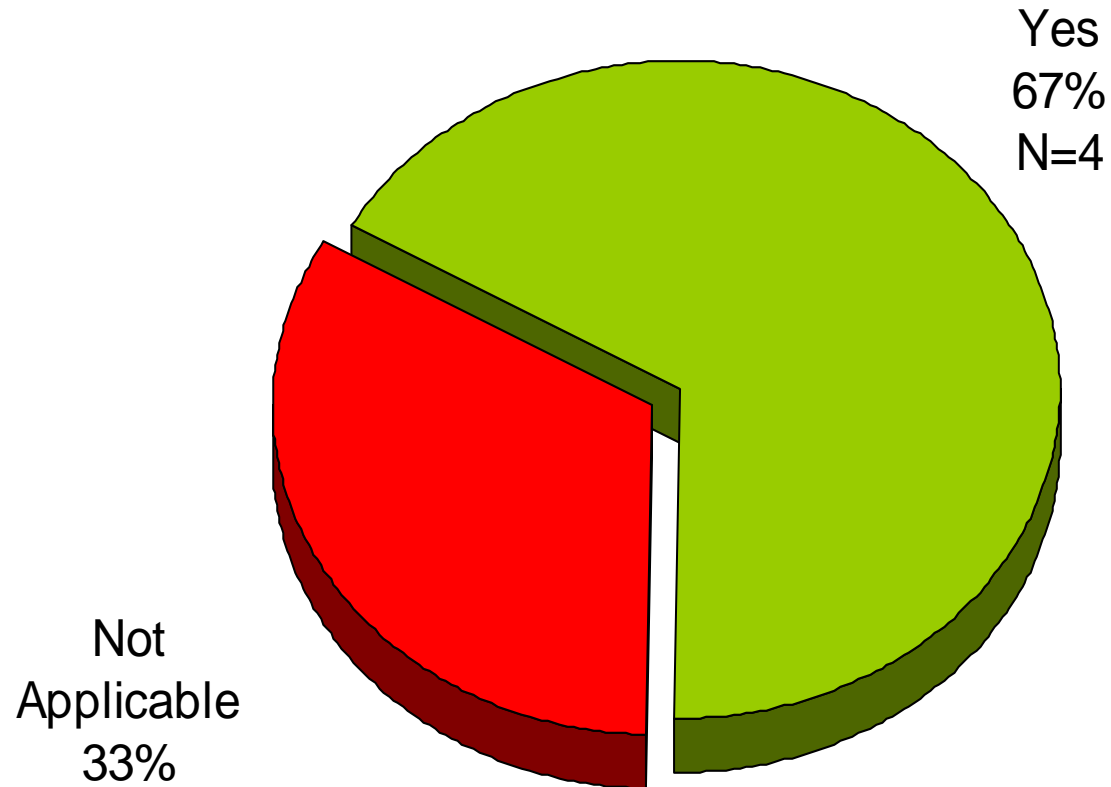
Q6. In deciding to attend NATPE 2008, which of the following programming genres was your company interested in selling and/or pre-selling?

Q7. For each of the programming genre(s) of interest to your company, what was the type of media?
N=6

Sales/Pre-Sales

- ➔ 4 companies indicated that they either completed sales while at NATPE or began discussions that are likely to lead to sales while at NATPE. 2 companies indicated that they either completed pre-sales while at NATPE or began discussions that are likely to lead to pre-sales.
- ➔ Of these, only one company provided details on one deal involving one title.
- ➔ Respondents did not report the value of sales that were completed while at NATPE 2008.
- ➔ One company reported that it expected \$90,000 worth of pre-sales to occur as a result of discussions initiated at NATPE.

Sales

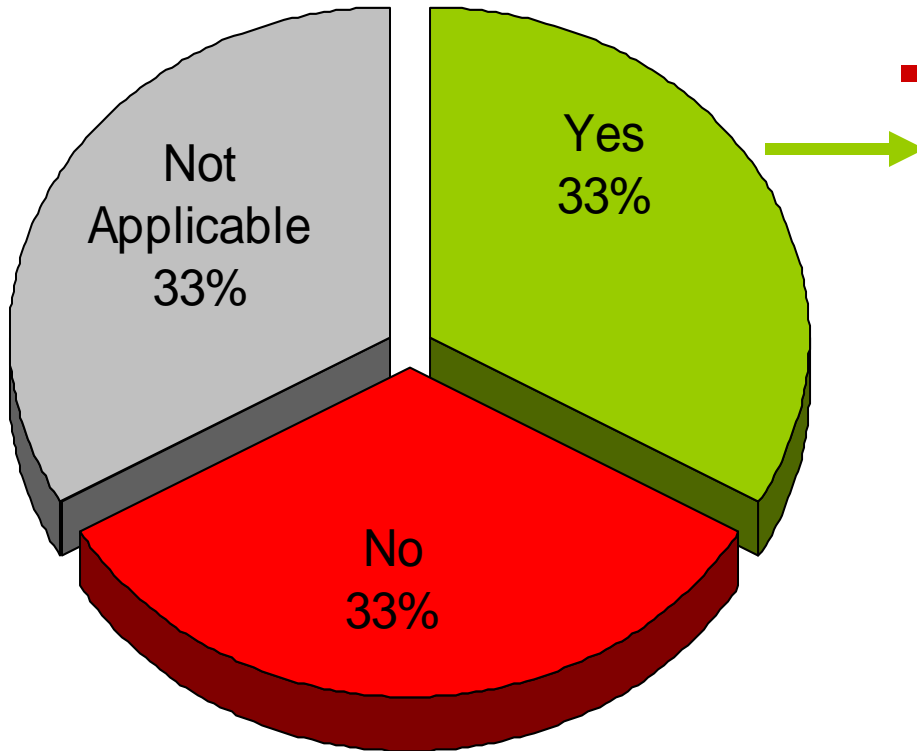


Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at NATPE 2008?
N= 6

Sales/Pre-Sales

- One company provided information on one deal involving one title from the *Reality* genre.
- No further details were supplied (i.e., value, seller's country)

Pre-Sales



- One company indicated that a pre-sale worth \$90,000 (with a U.S. seller) is likely to occur as a result of discussions initiated at NATPE 2008.



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

N=6

Co-Production and Co-Venture Deals

- ➔ **No co-production or co-venture deals were negotiated at NATPE 2008.**
- ➔ **Respondents reported that they participated on average in 18 business meetings each while at NATPE 2008.**

Q9a,b. Did you either sign, or begin negotiating any co-production or co-venture deals while at NATPE 2008? How many were signed?

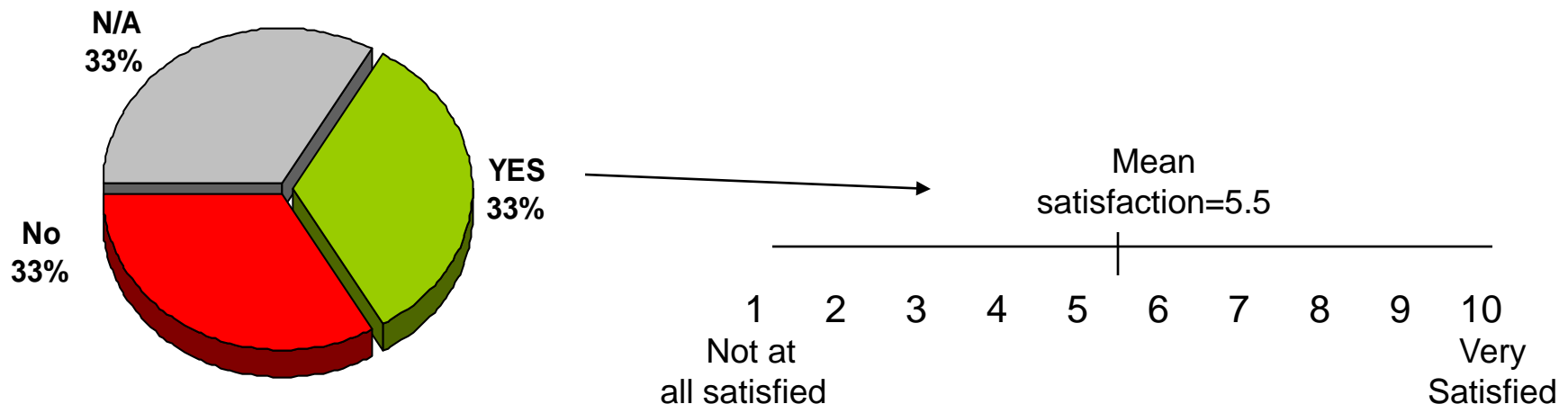
Q.10 How many business meetings did you participate in while at NATPE 2008?`

N=6



Title Screening

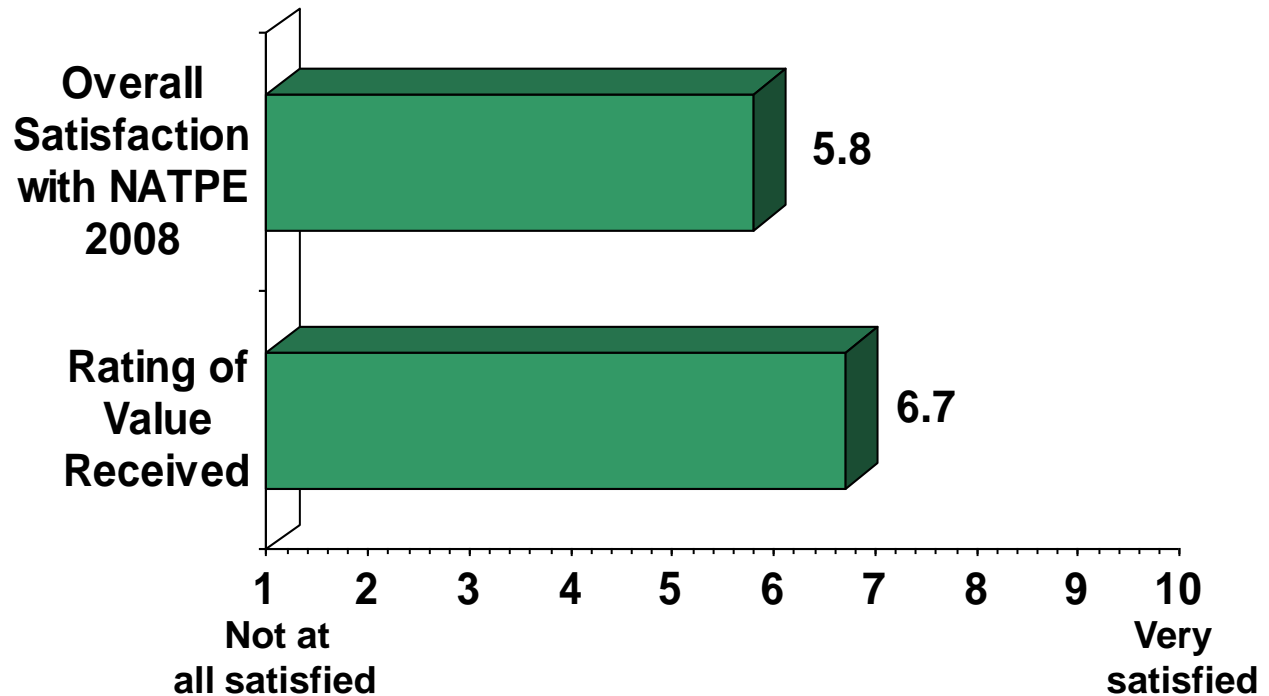
- 2 companies (33% of respondents) indicated that they had a title screened at NATPE 2008.
- These respondents gave an average satisfaction score of 5.5 for the visibility their titles received from the screenings (2.2 lower than in the previous year).



Q11. Were any of your titles screened at NATPE 2008 (N=2)

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=2)

Overall Satisfaction With and Value of NATPE 2008



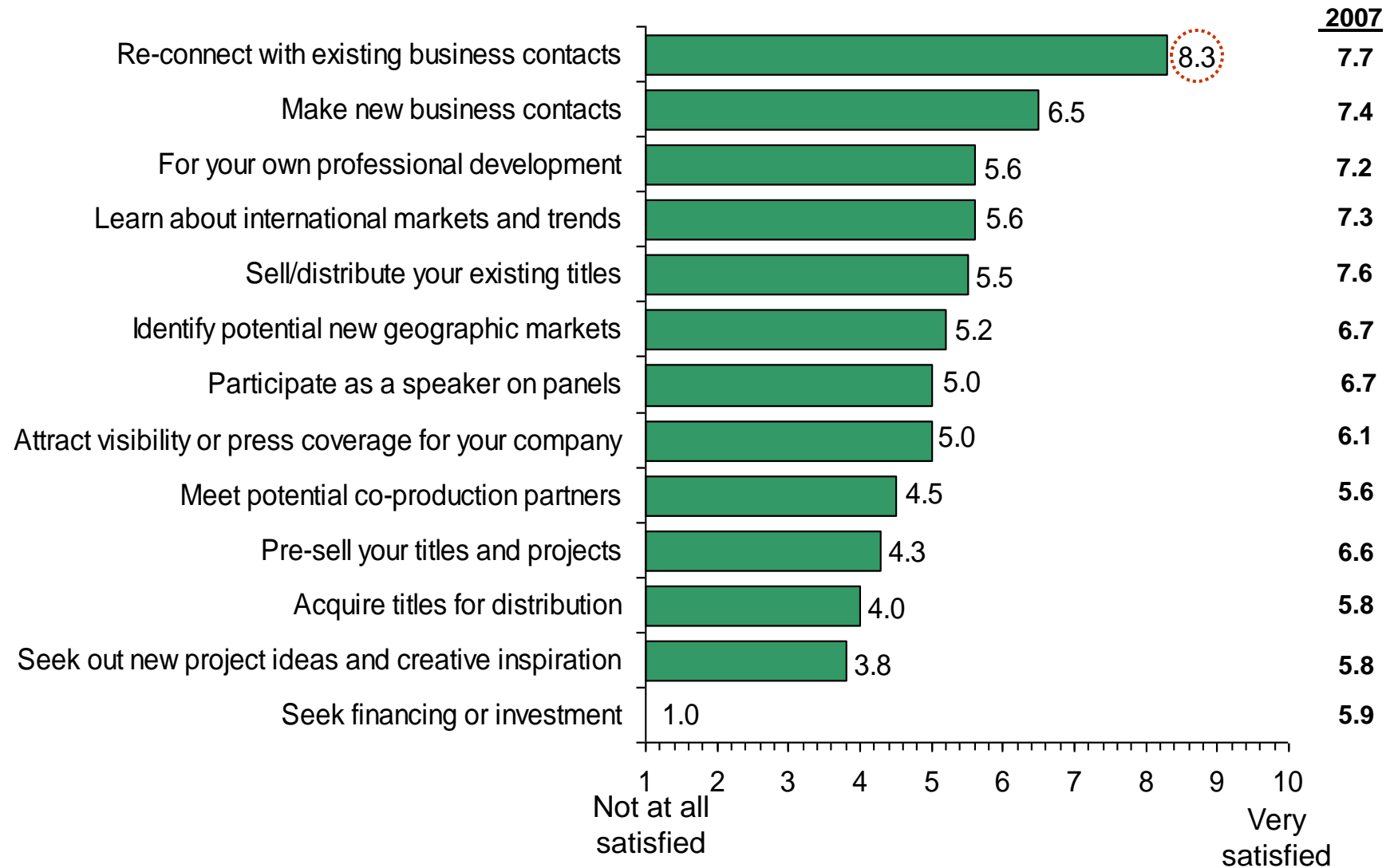
Q13a. How satisfied would you say you were overall with NATPE 2008 in terms of facilities provided, meeting potential contacts, support, etc... Using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied.

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



N=6

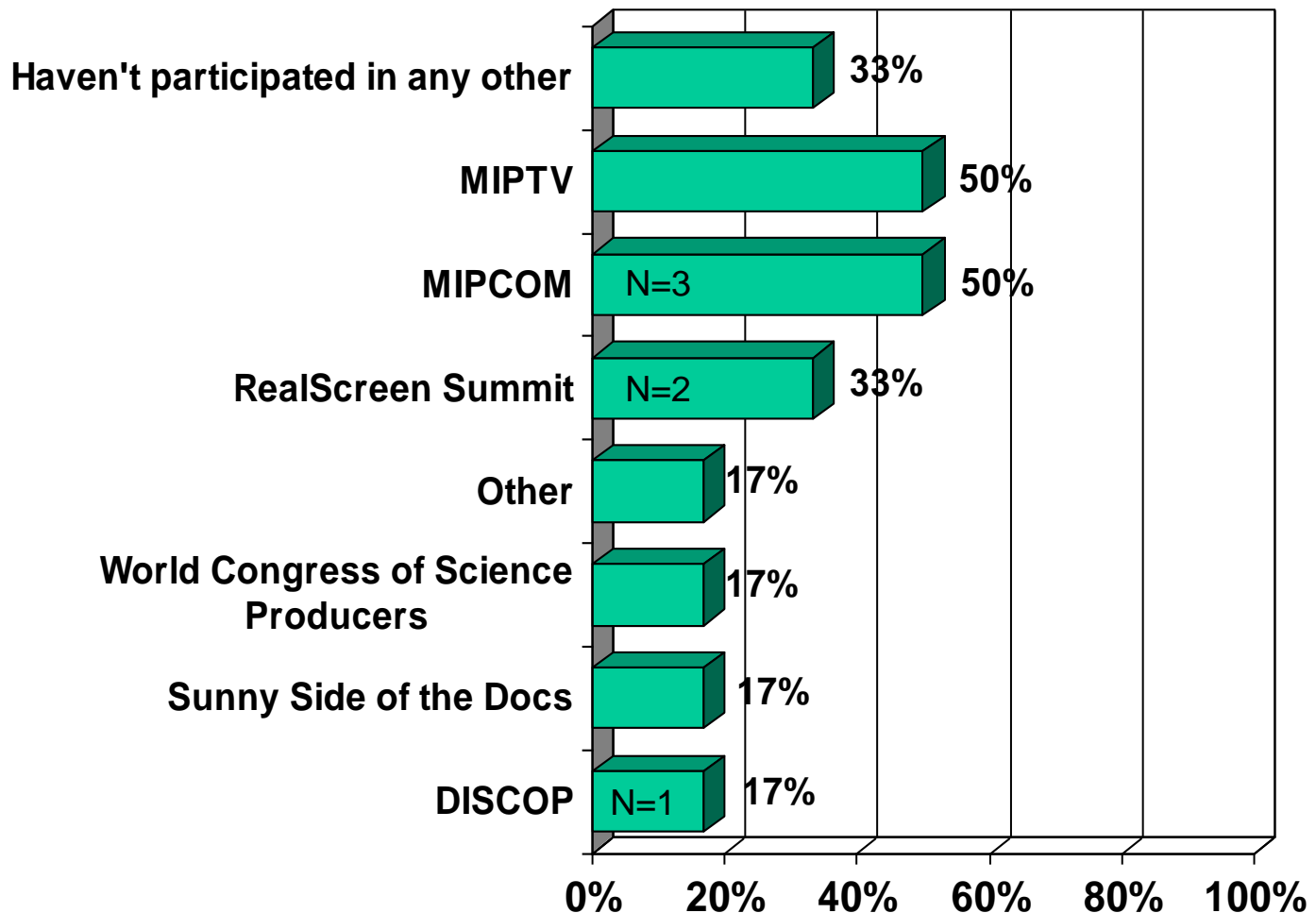
Satisfaction with NATPE 2008



Q13c. How satisfied were you with NATPE 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=6

International Markets & Festivals Attended

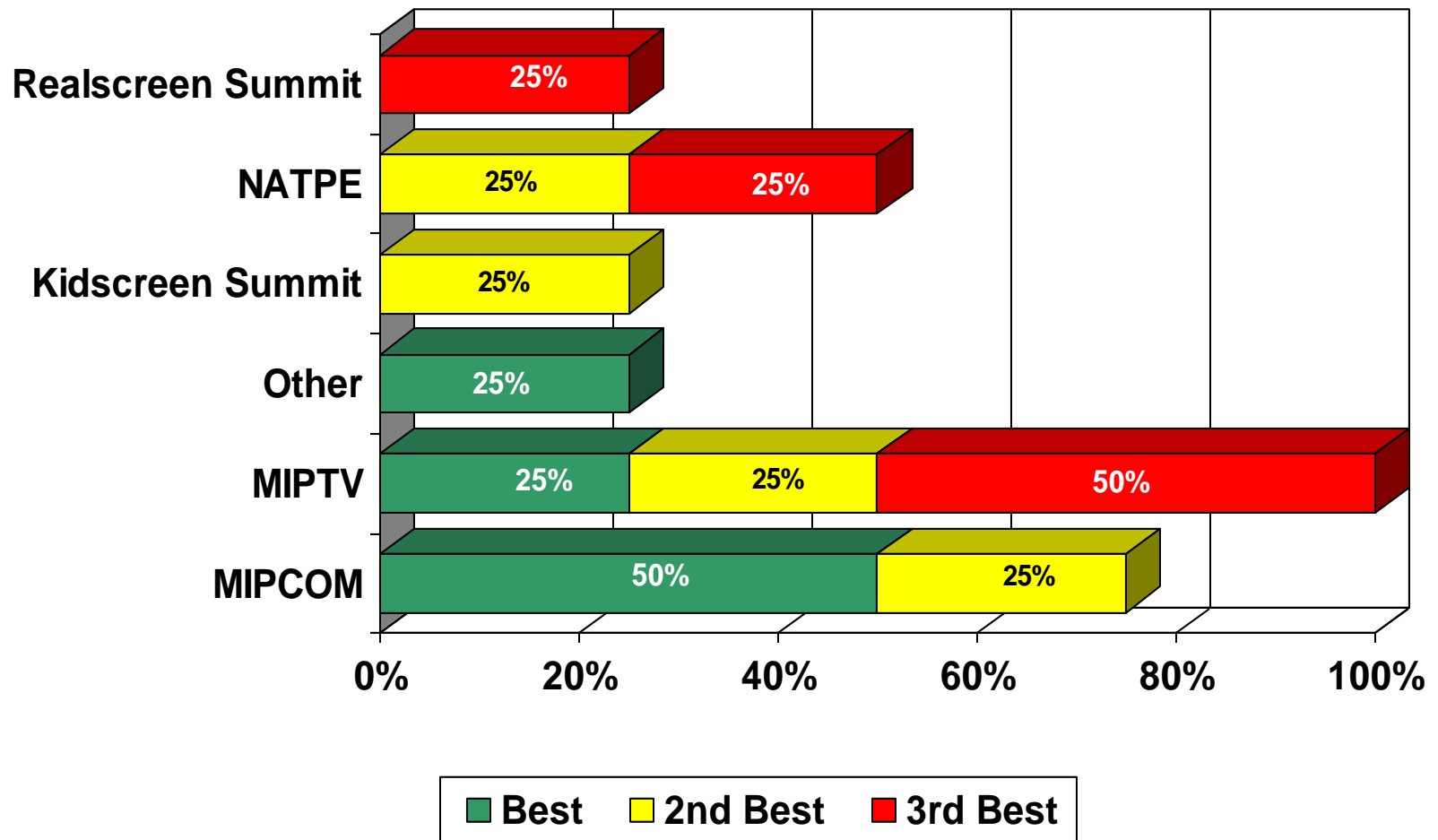


Q14. Which, if any of the following international markets and festivals held in other countries have you attended during the past two years? *Select all that apply*



N=6

Rating of International Festivals & Markets



Q15 Thinking of NATPE 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?

Revenues from International Sales

- ➔ **On average, the international sales accounted for 39% of revenues, amongst the five companies who answered this question**

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

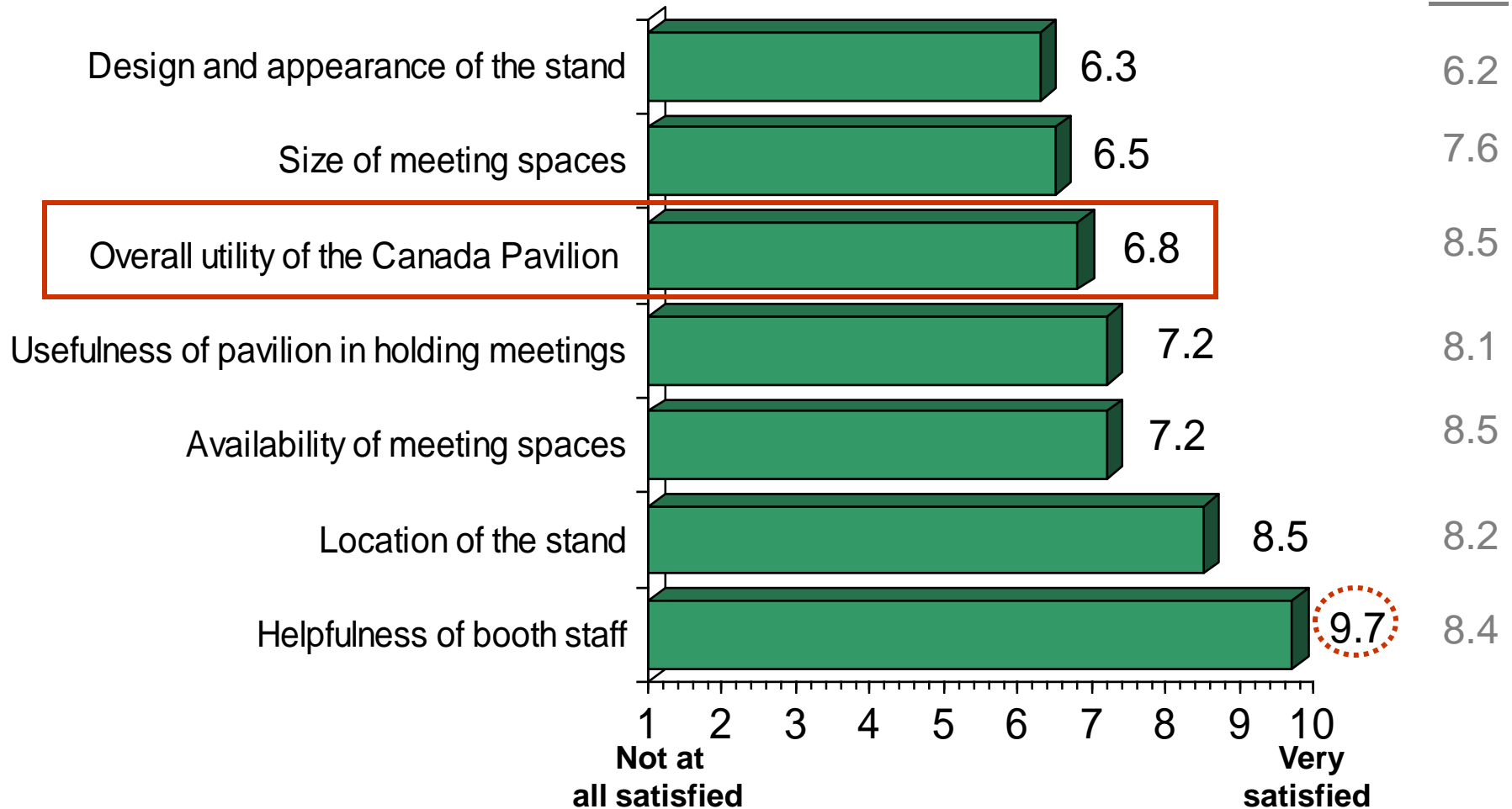
N=5



Satisfaction with Canada Pavilion

- *All participants used the services of Canada Pavilion*

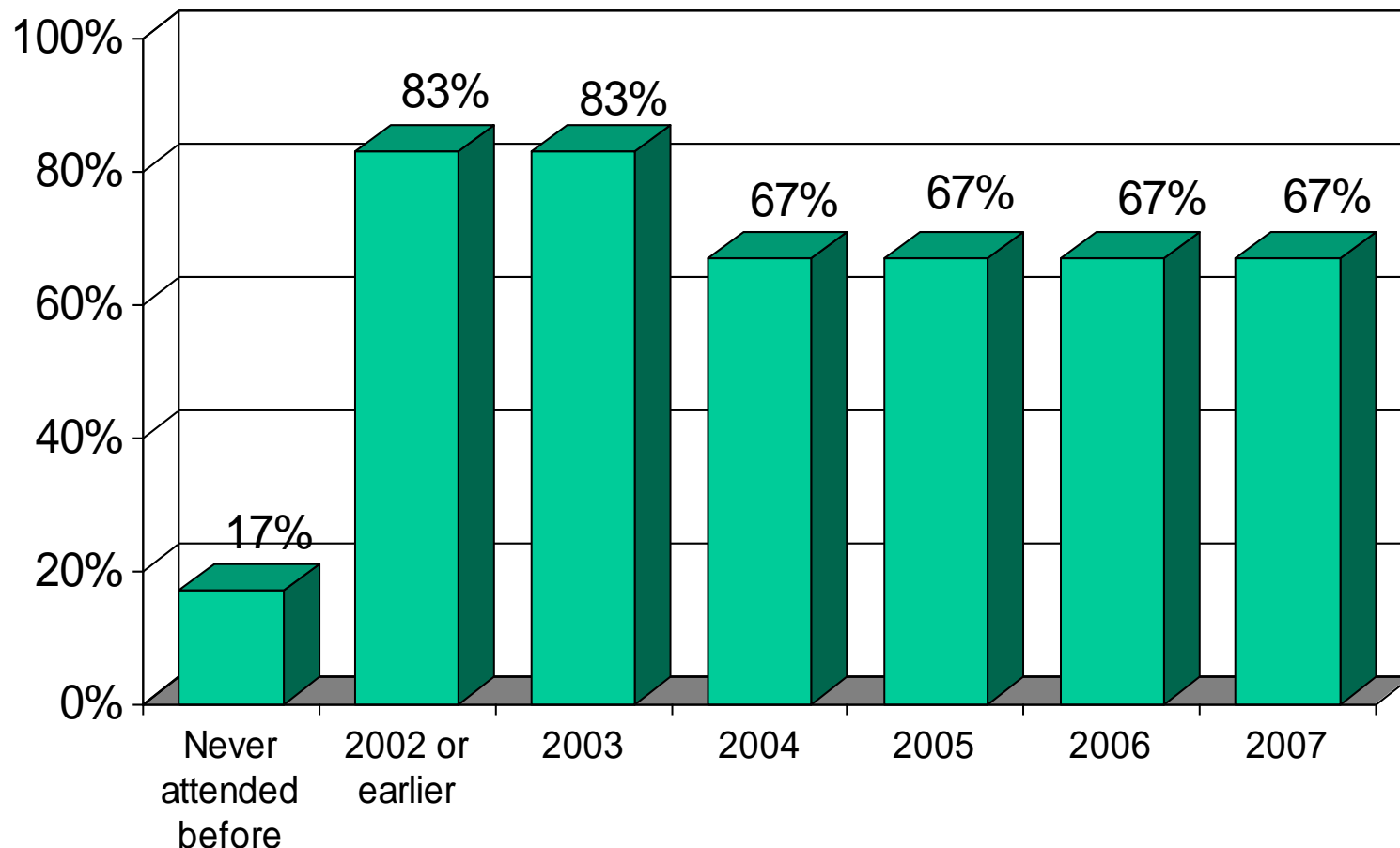
2007



Q19 Please rate your level of satisfaction with each of the following aspects of the Canada Pavilion at NATPE 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=6

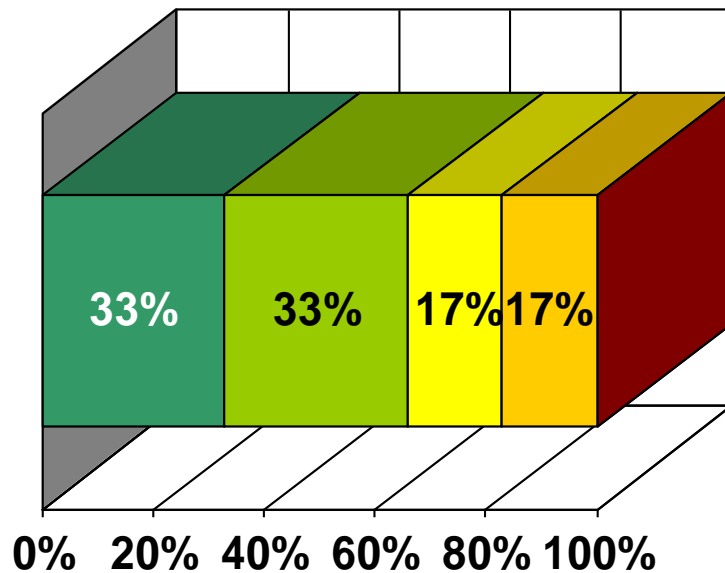
NATPE 2007 N=13

Past Attendance at NATPE

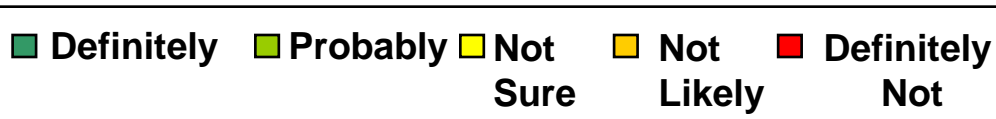


Q21. Which previous NATPE events, if any, has your company attended?
Select all that apply
N=6

Likelihood of, and Reasons for, Recommending NATPE to Others



- *“Best to reach Latin America.”*
- *“Dependant de leur secteur d'activité.”*
- *“We would all prefer NATPE to be held in New Orleans or even Toronto, but Las Vegas is an adequate location and surely NATPE is the most important television programming market in North America.”*



Q22a. Would you recommend NATPE to other companies in the Canadian audio-visual industry? N=6

Q22b. Please explain your answer. N=3

Cost of Attending NATPE 2008

- ➔ **Companies incurred an average cost of \$6,600 in attending NATPE 2008.**
 - **Minimum cost: \$3,000**
 - **Maximum cost: \$10,000**
- ➔ **Only one company indicated that it received funding in the value of \$3,000, which was provided by the federal government.**

Summary

Summary

- Given such a small number of respondents to the survey, the results within this report should be treated with caution and used for directional purposes only.
- Of the six companies that completed the survey, four indicated that while at the event, they either completed sales, or began discussions that are likely to lead to sales.
- Since only one of those companies provided details about just one possible future transaction, the true value of sales and pre-sales at NATPE is likely under-represented.



Summary

- Overall, compared to the previous year, participants were less satisfied with NATPE 2008, giving an overall satisfaction score of 5.8 out of 10. This is notably less than the last year's score of 7.1.
- Respondents were also somewhat less satisfied with NATPE in terms of the value they received, giving an average rating of 6.7 (down from 7.1)
- Participants were most satisfied with the NATPE in terms of *reconnecting with existing business contacts* (8.3 out of 10).
- A distant second was *making new business contacts* (6.5).
- They were least satisfied with *pre-selling their titles and projects* (4.3), coincidentally, this appears to have been a very relevant topic to the participants (*"Not applicable"* - 0%).
- Only two participants had their titles screened at NATPE, and they rated the satisfaction with the visibility their titles received at 5.5 points, vs. 7.7 last year.

Summary

- All of the survey respondents used the services provided by the Canada Pavilion at the 2008 NATPE.
- The overall satisfaction with the Pavilion's utility was average, at 6.8 out of 10 (down from 8.5 last year).
- Participants were most satisfied with the helpfulness of the booth's staff, rating it 9.7 vs. 8.4 last year. They were also pleased with the booth's location (8.5 vs. 8.2 last year)
- They were less satisfied with the booth in terms of the size and design:
 - Size of meeting spaces (6.5)
 - Design and appearance of the stand (6.3)



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