

2008 European Film Market (EFM) Outcomes Report



**For:
Telefilm Canada**

May 2008



Methodology

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- A total of 48 e-mail invitations were sent to Canadian companies that attended the 2008 European Film Market in Berlin.
- 37 of the 48 companies clicked on the link in the e-mail invitations to go to the survey site.
- Of these, 36 completed all of the survey - a 75% response rate (vs. 43% in 2007).
- The survey was open from March 18 until April 30, 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 48 companies



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



36 companies reached the
end of the survey

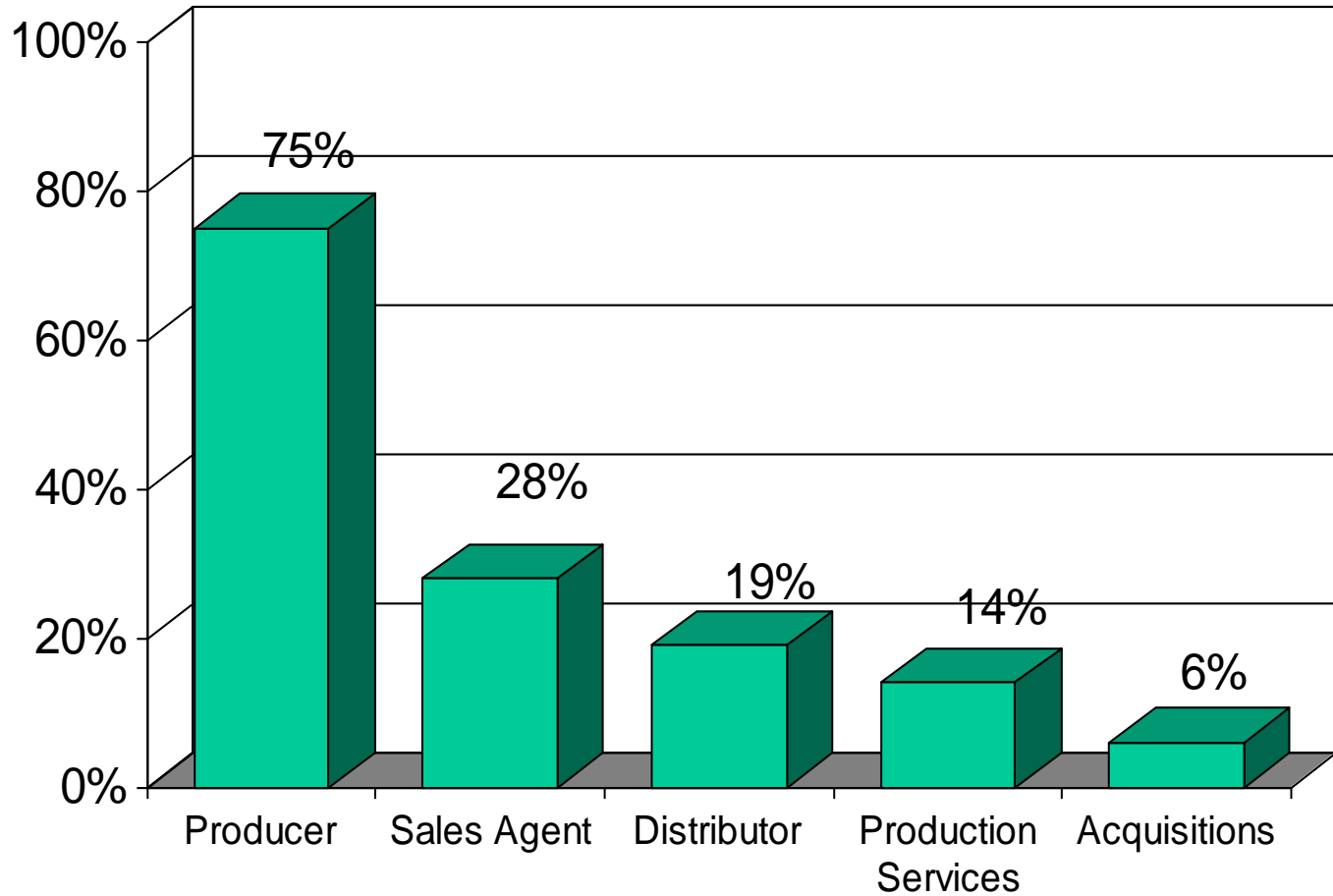
Sample and Respondents by Province

- 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 | 14 | 11 | 11 |
| Ontario | 23 | 19 | 18 |
| British Columbia | 7 | 4 | 4 |
| Nova Scotia | 4 | 3 | 3 |
| Total | 48 | 37 | 36 |

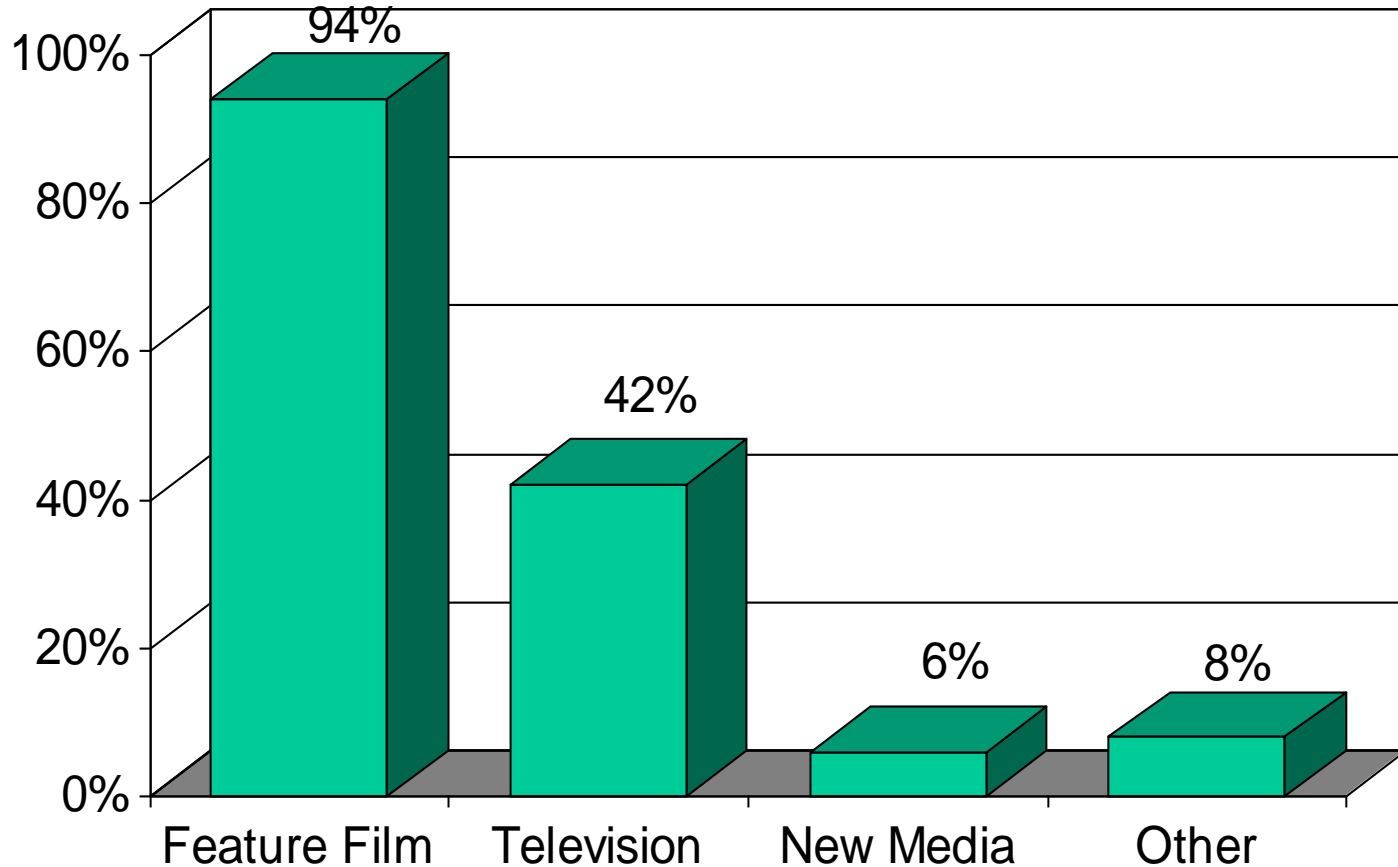
Respondent Profile

Primary Business Focus of Company



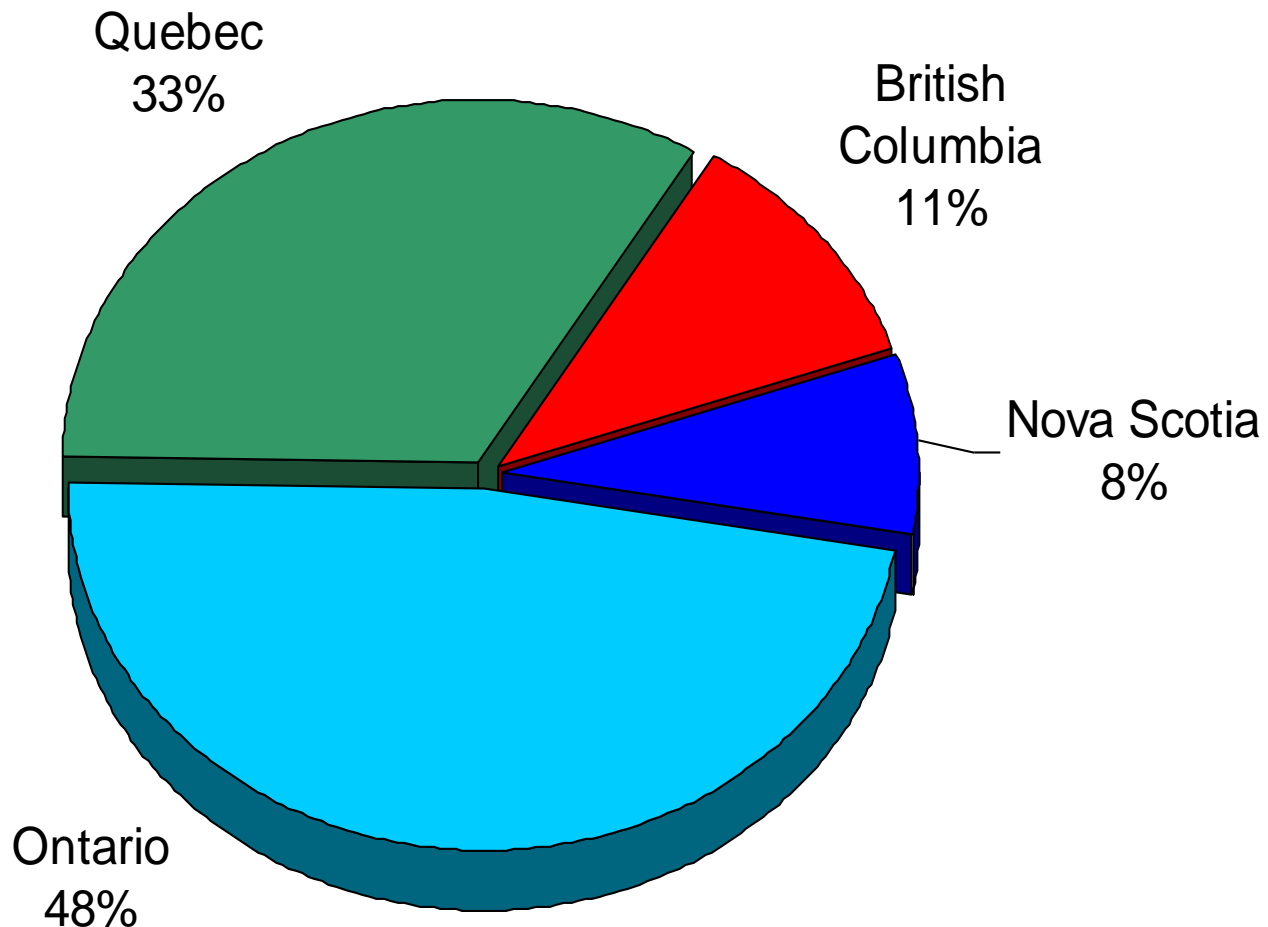
Q1. What is the primary business focus of your company? *Select all that apply.*
N=36

Main Format(s) of Interest



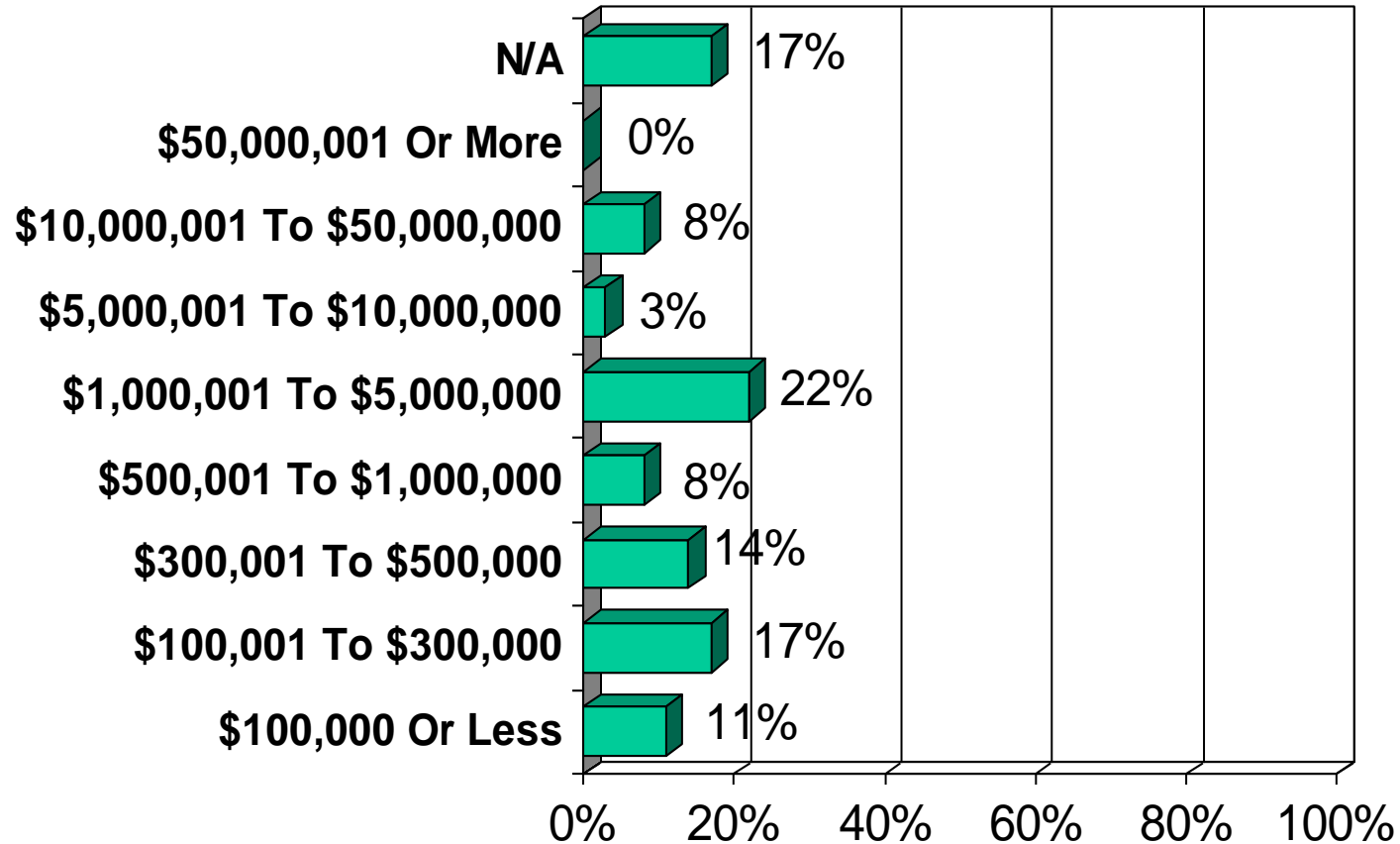
Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=36

Location of Head Office



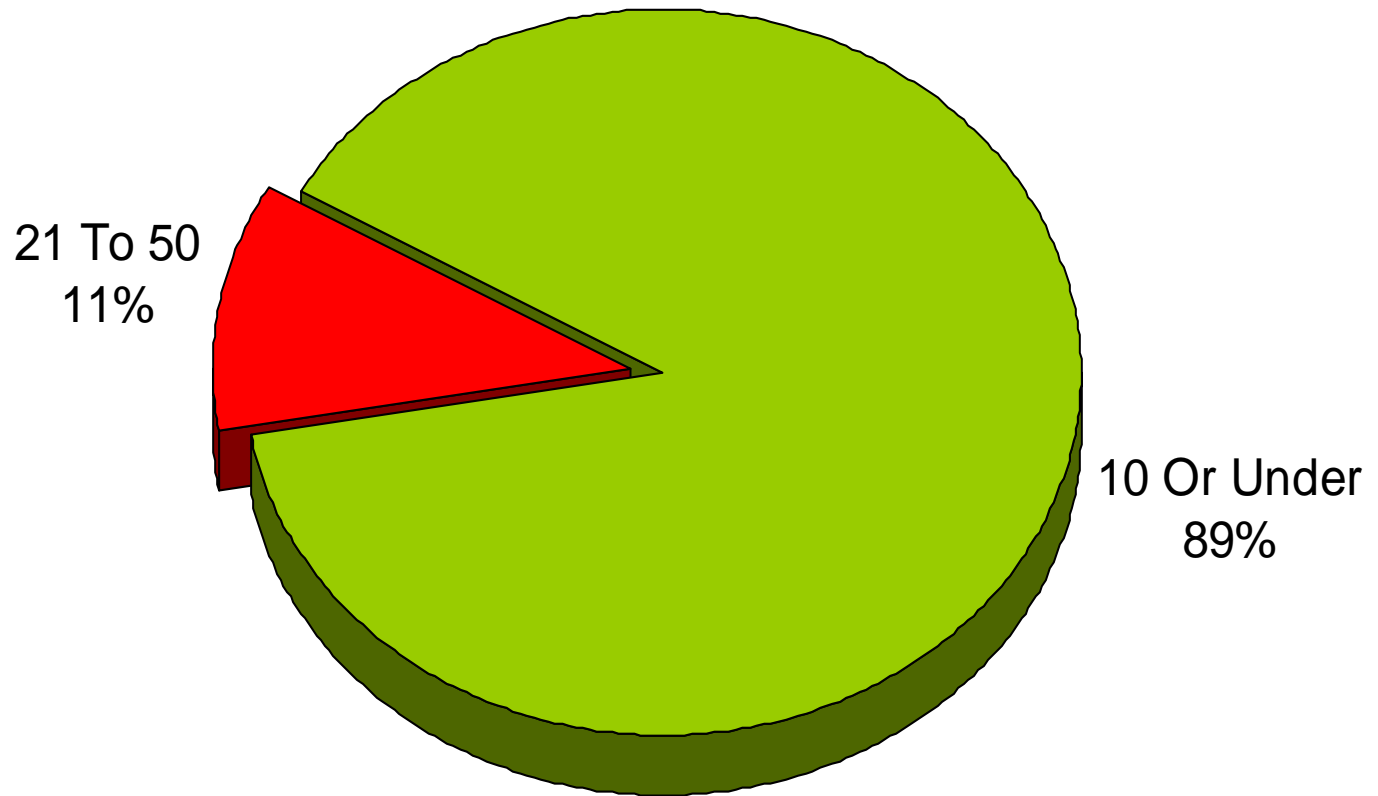
Q3. In which province/territory is your head office located? N=36

Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?
N=36

Number of Employees



Q5. How many full-time employees are there currently in your company?
N=36

The Film Market

Genres and Formats Companies Interested in Selling and/or Pre-Selling at 2008 EFM

| | Feature Film | Television | New Media |
|--------------------------------|--------------|------------|-----------|
| Drama | 75% | 11% | 0% |
| Documentary/Educational | 36% | 28% | 11% |
| Comedy | 36% | 8% | 3% |
| Horror/Thriller | 25% | 6% | 0% |
| Action/Adventure | 19% | 6% | 0% |
| Romantic | 19% | 0% | 0% |
| Children's Programming | 17% | 3% | 0% |
| Science Fiction | 6% | 0% | 0% |
| Animation | 8% | 3% | 0% |
| Public Affairs | 3% | 3% | 0% |
| Lifestyle | 3% | 3% | 0% |
| Reality TV | 0% | 3% | 3% |

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

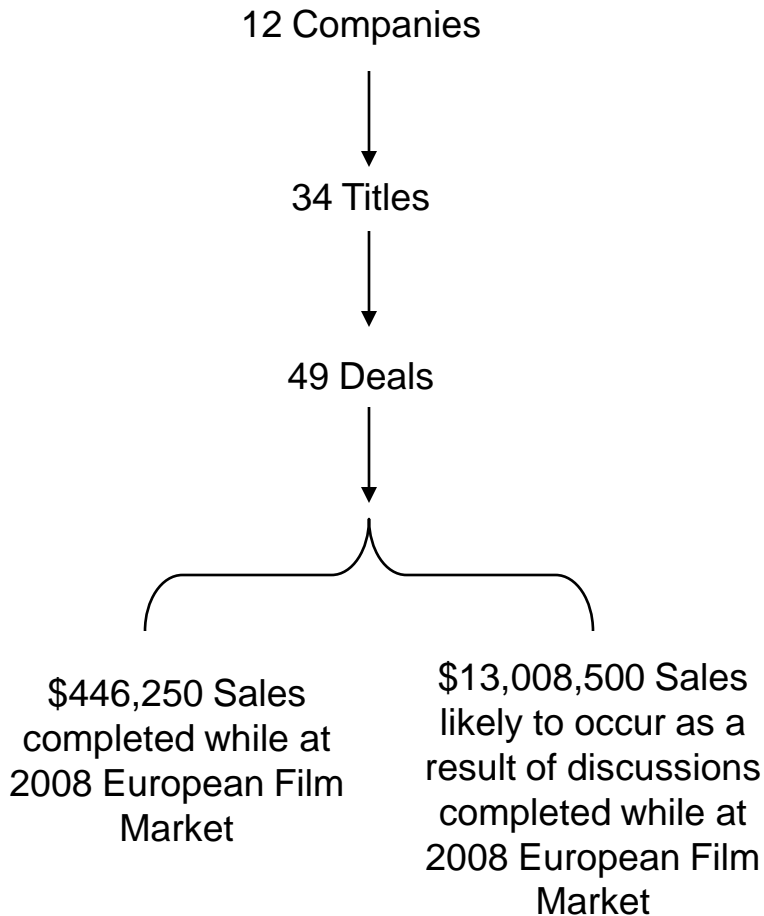
Q7. For each of the programming genre(s) of interest to your company, what was the type of media?
N=36

Sales & Pre-Sales

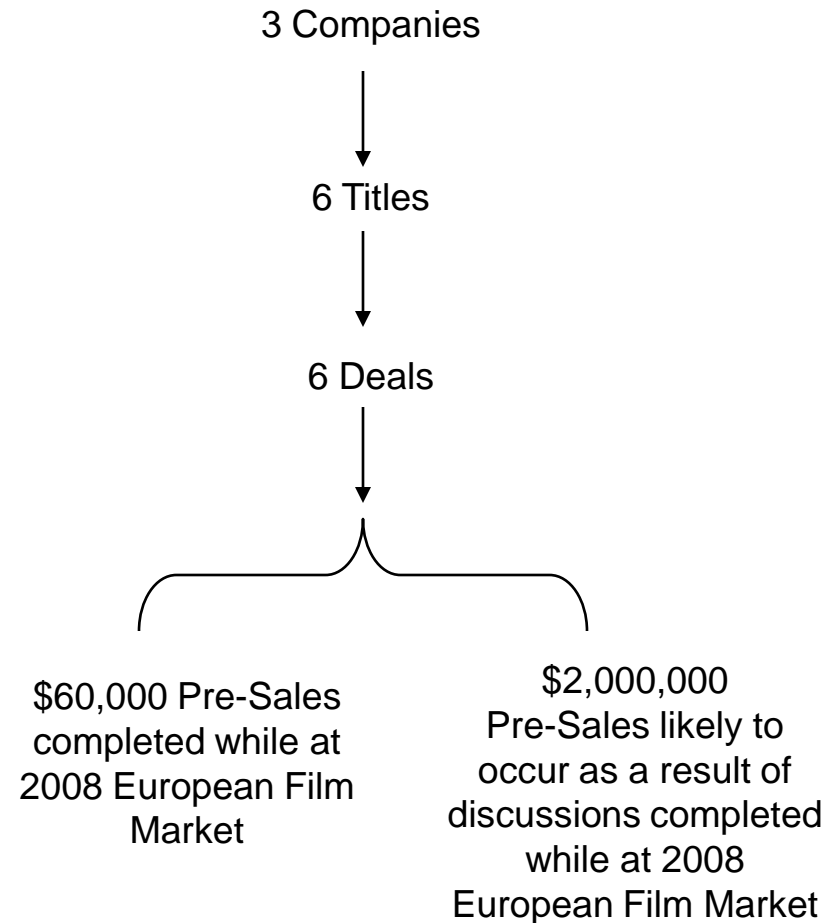
- 31 (86%) companies indicated that they either completed sales while at the European Film Market or began discussions that are likely to lead to sales while at EFM.
- 15 companies indicated that they either completed pre-sales while at the European Film Market or began discussions that are likely to lead to pre-sales.
- Of these, 13 companies provided information on 55 deals involving 38 titles.
- Companies reported that 31 distribution agreements were signed.
- Respondents reported that \$446,250 of sales were completed while at the 2008 EFM and that \$13,008,500 worth of sales are likely to occur as a result of discussions initiated at the market.
- Companies reported \$60,000 worth of presales at the 2008 European Film Market, and they expect \$2,000,000 of pre-sales to occur as a result of discussions initiated at EFM.

Breakdown of Sales and Pre-Sales Deals

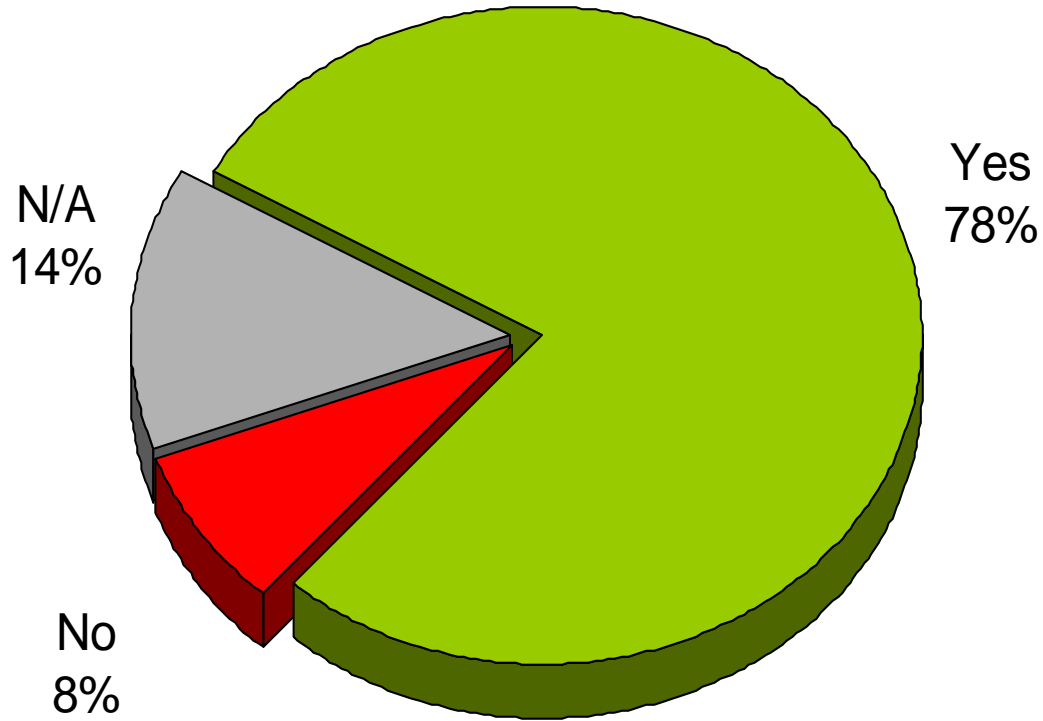
Sales/Likely Sales



Pre-Sales/Likely Pre-Sales

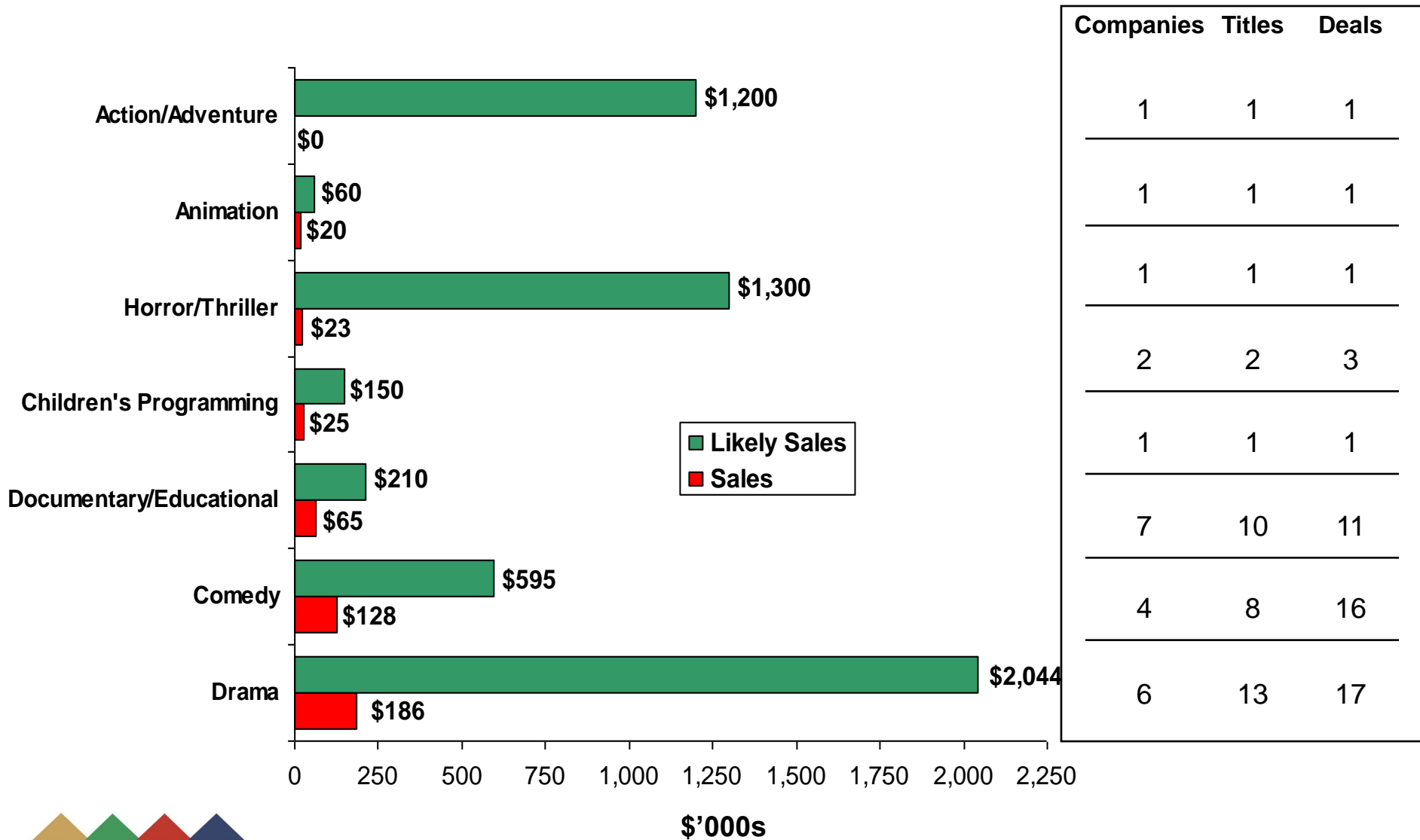


Sales

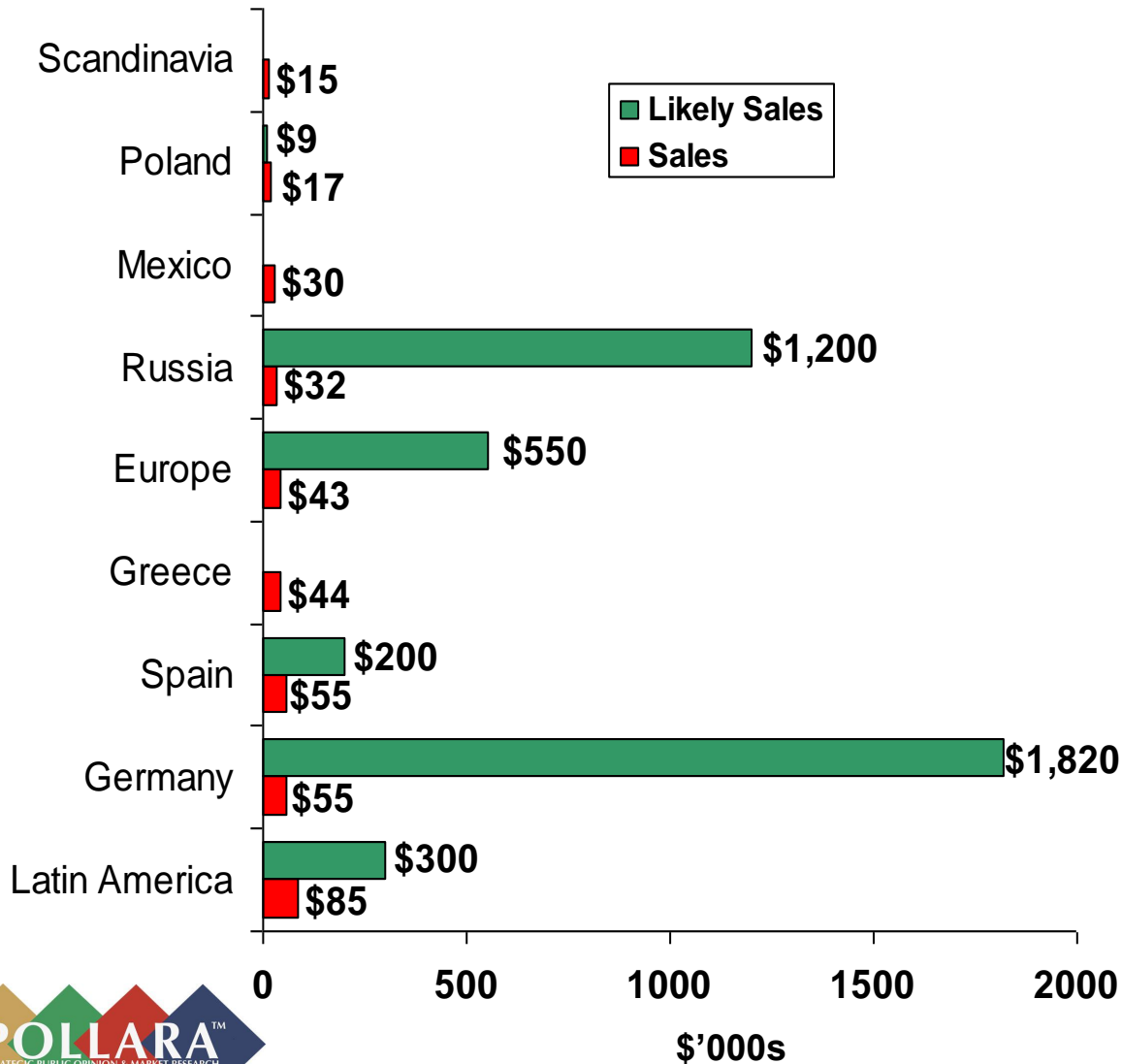


Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at the 2008 EFM? N=36

Breakdown of Sales and Likely Sales by Genre

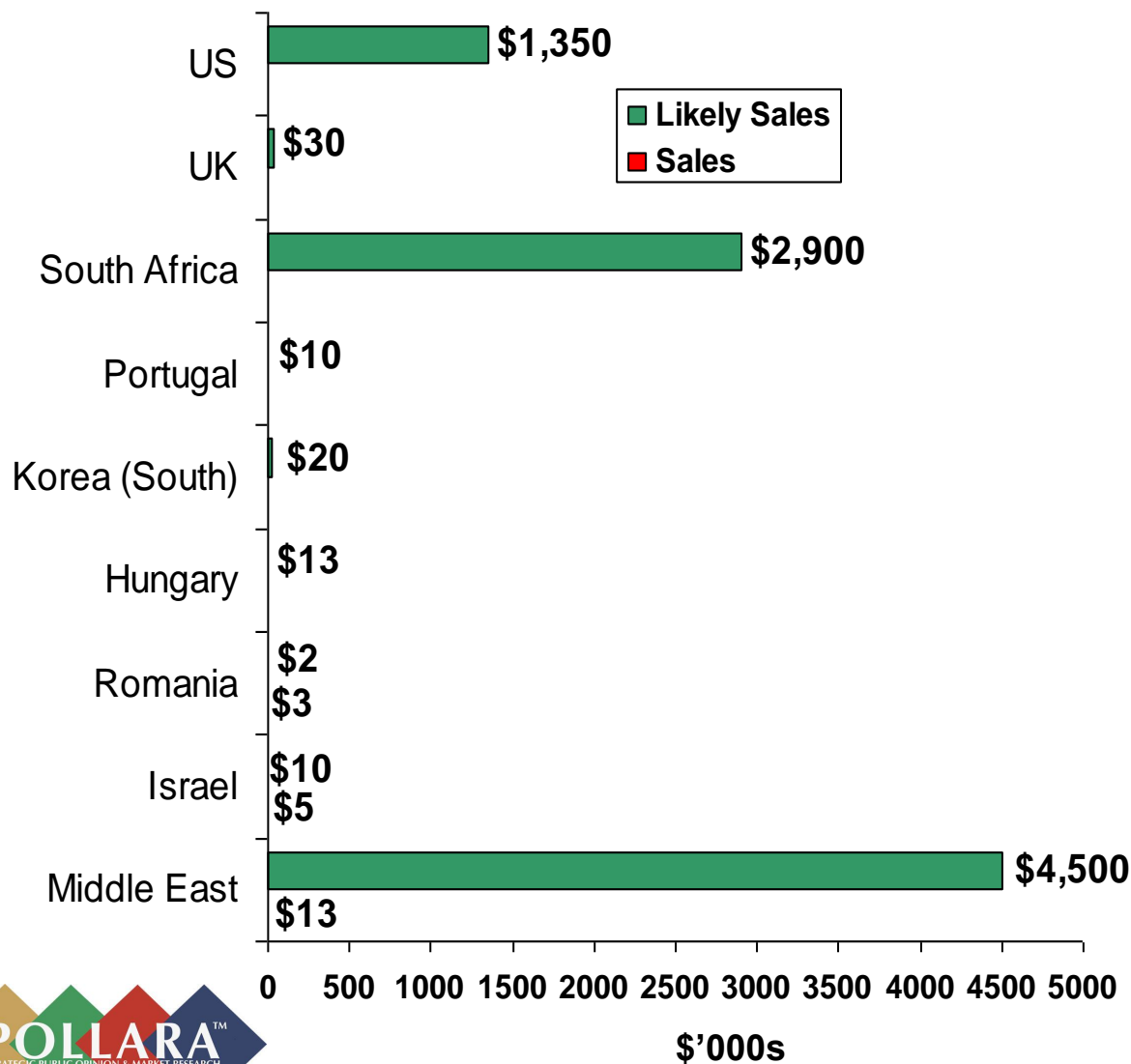


Breakdown of Sales & Likely Sales by Country



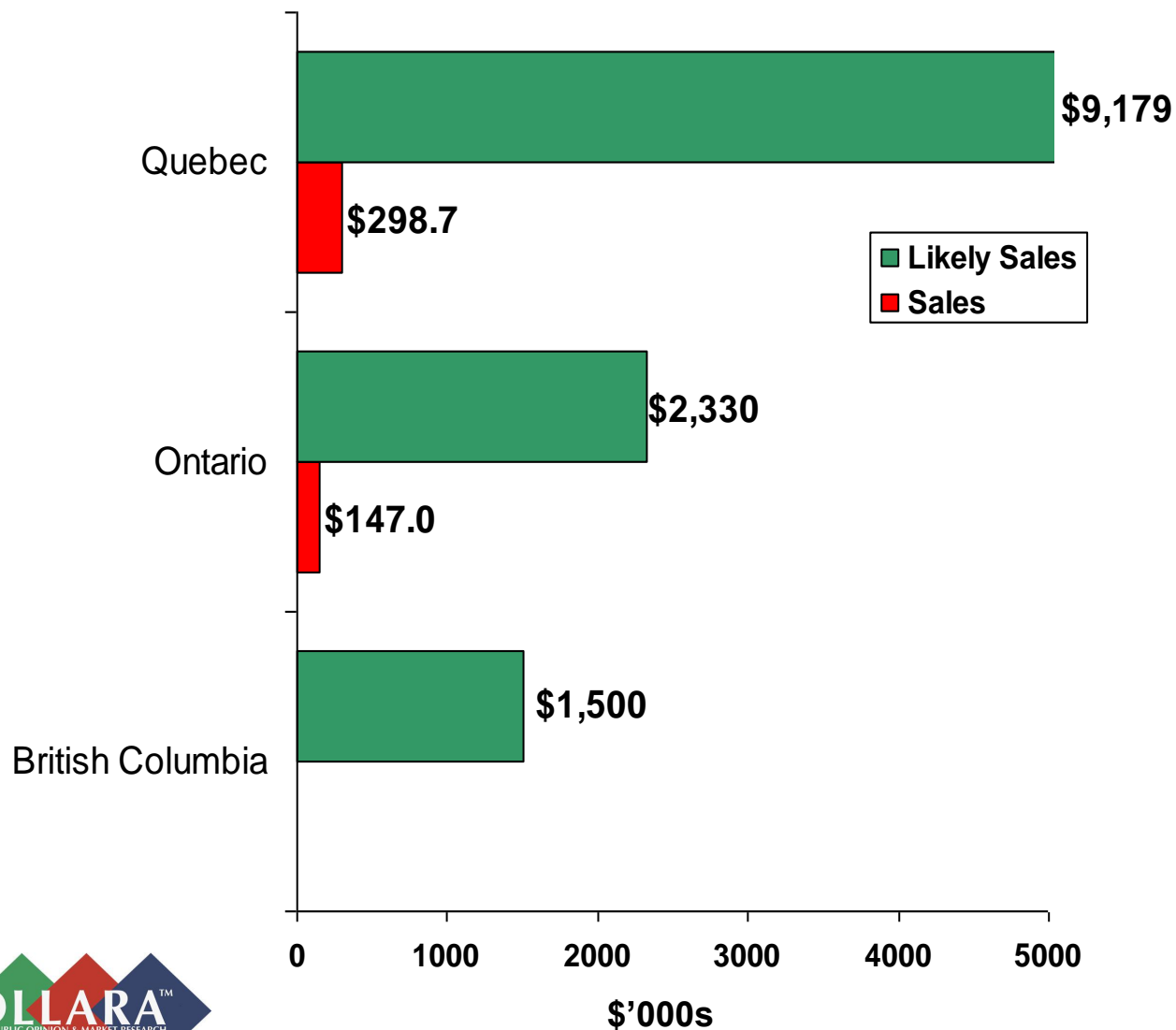
| Companies | Titles | Deals |
|-----------|--------|-------|
| 1 | 1 | 1 |
| 3 | 3 | 3 |
| 1 | 1 | 1 |
| 3 | 4 | 4 |
| 2 | 3 | 3 |
| 2 | 2 | 2 |
| 3 | 3 | 3 |
| 4 | 5 | 5 |
| 3 | 4 | 4 |

Breakdown of Sales & Likely Sales by Country



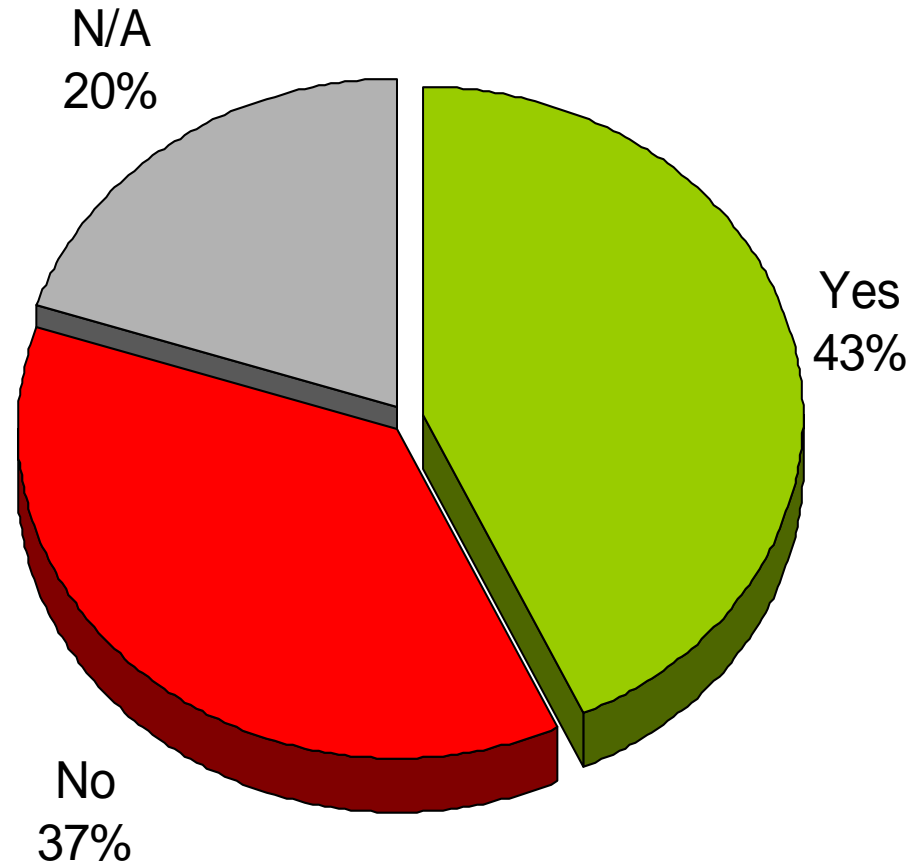
| Companies | Titles | Deals |
|-----------|--------|-------|
| 1 | 1 | 1 |
| 3 | 3 | 3 |
| 1 | 1 | 1 |
| 3 | 4 | 4 |
| 2 | 3 | 3 |
| 2 | 2 | 2 |
| 3 | 3 | 3 |
| 4 | 5 | 5 |
| 3 | 4 | 4 |

Breakdown of Sales and Likely Sales by Company Region



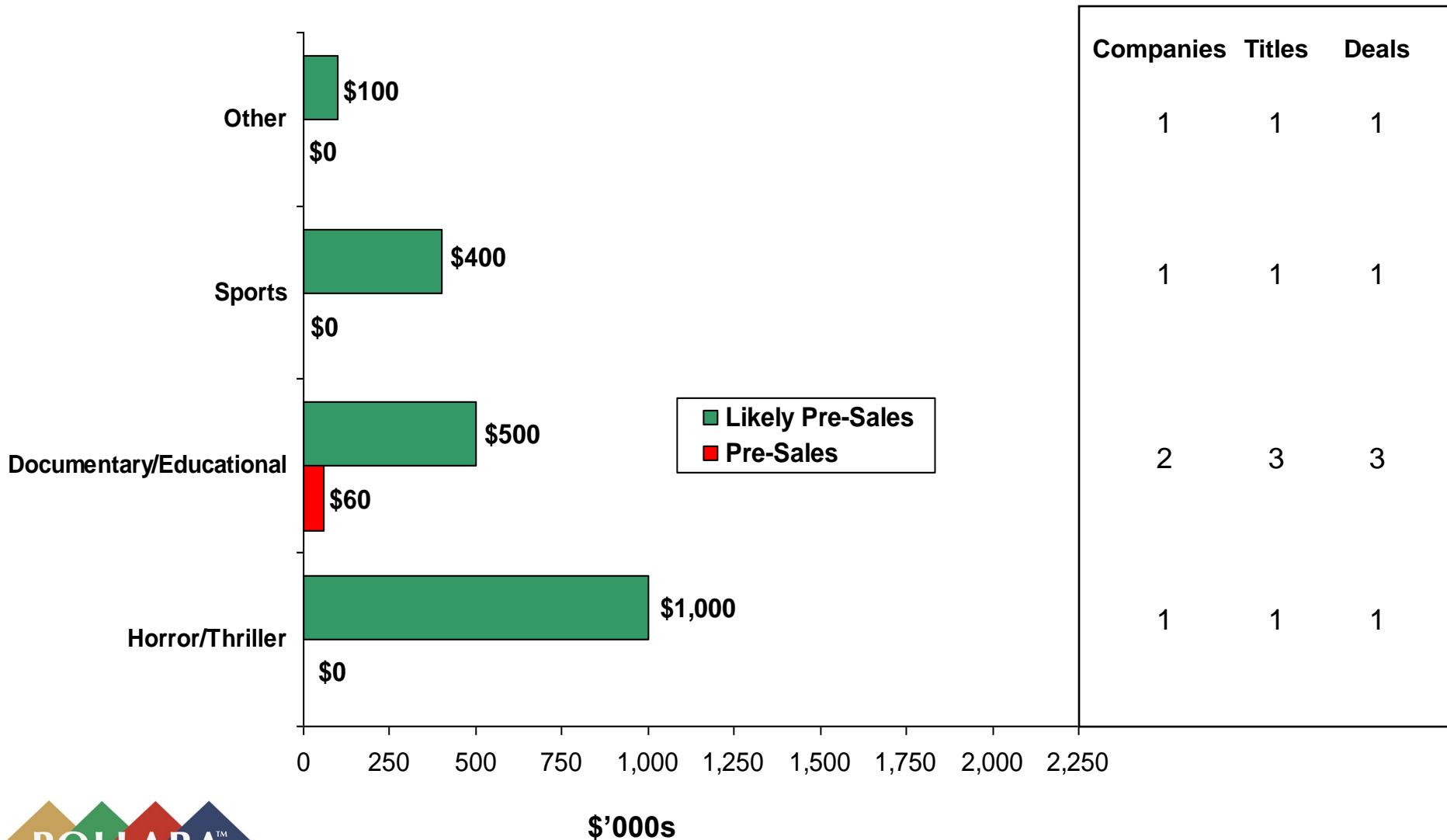
| Companies | Titles | Deals |
|-----------|--------|-------|
| 5 | 19 | 32 |
| 6 | 14 | 16 |
| 1 | 1 | 1 |

Pre-Sales

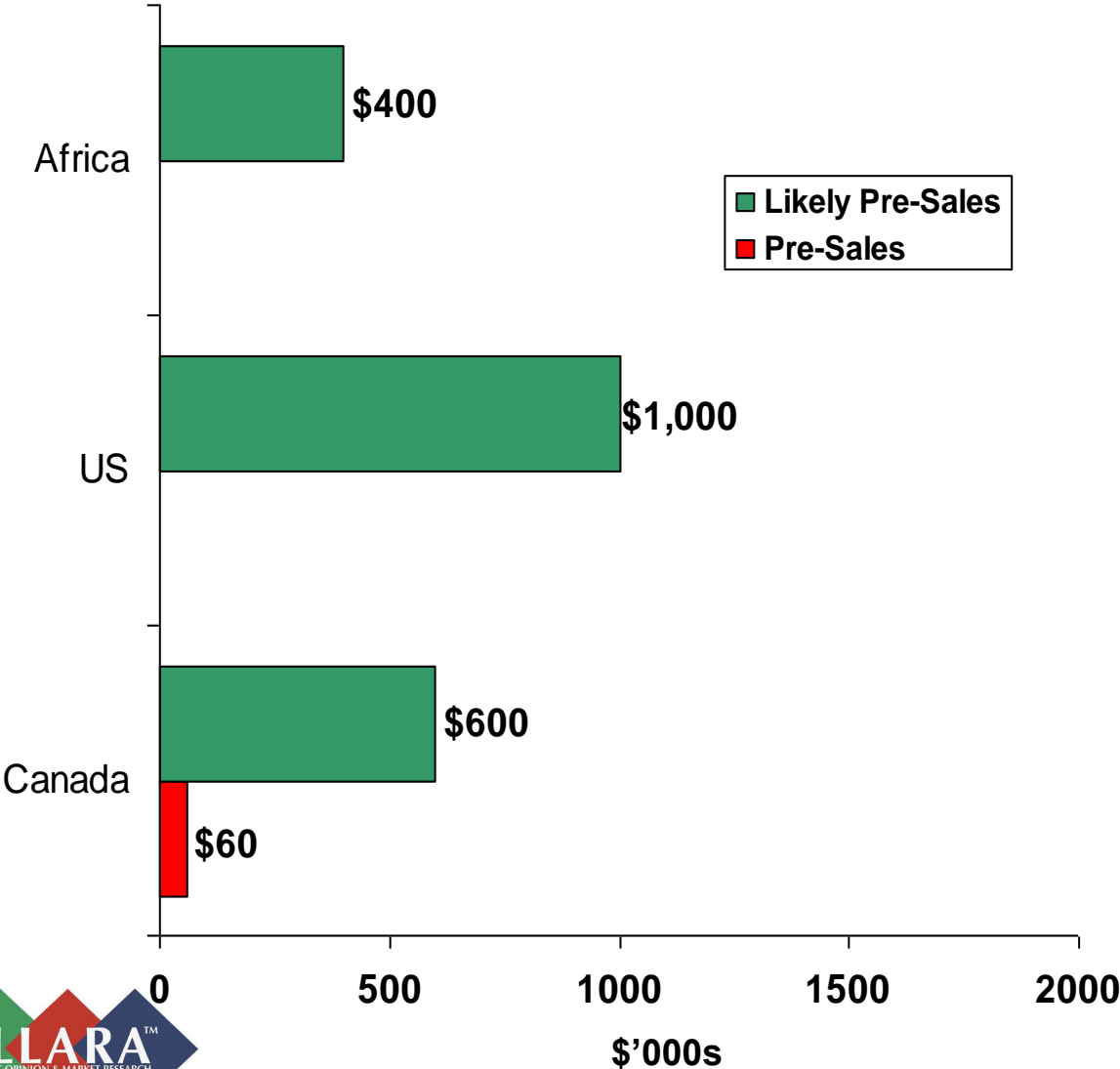


Q8e. Did you complete any pre-sales or begin discussions that will likely lead to pre-sales while at the 2008 EFM? N=35

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



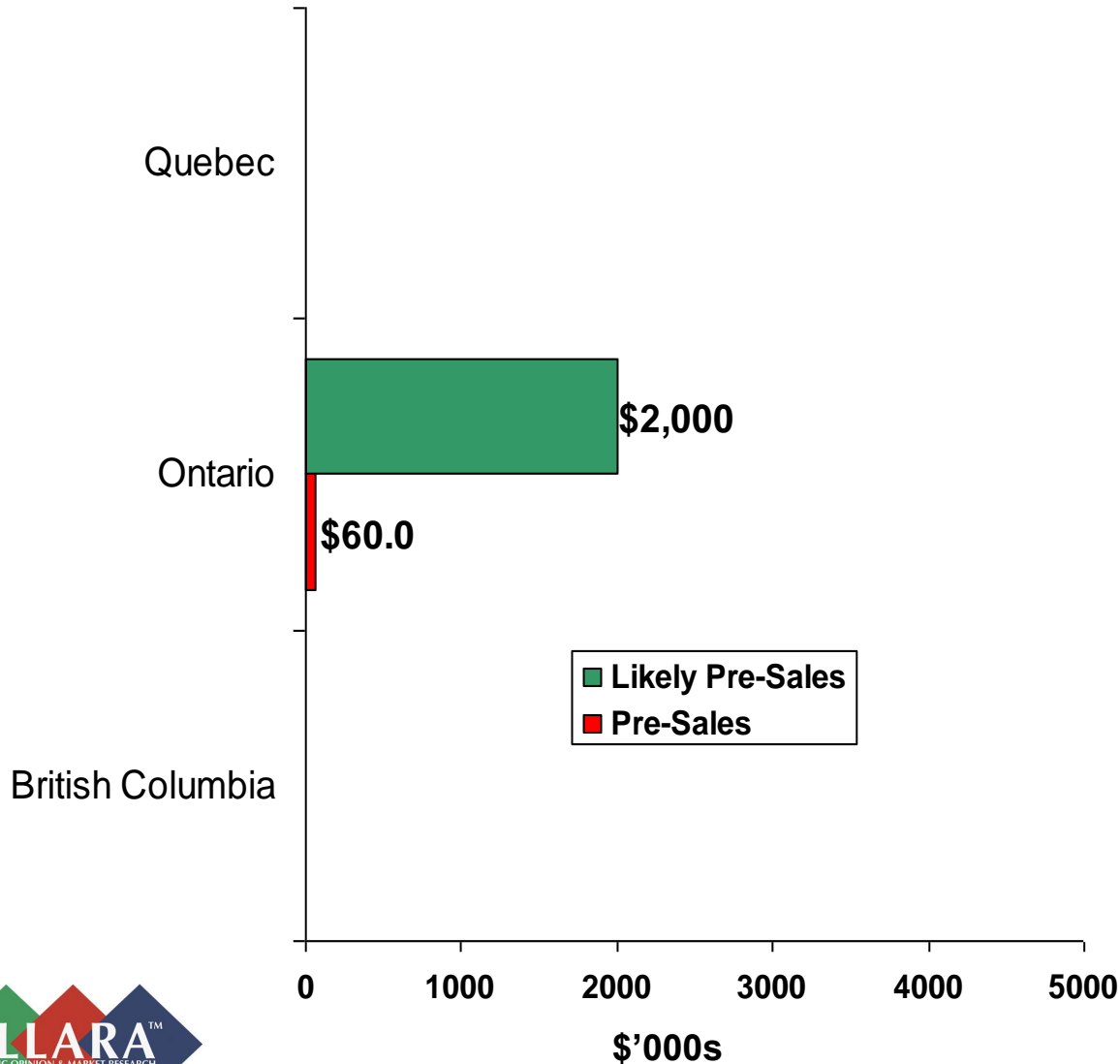
Breakdown of Pre-Sales by Country



| Companies | Titles | Deals |
|-----------|--------|-------|
| 1 | 1 | 1 |
| 1 | 1 | 1 |
| 2 | 3 | 3 |



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



| Companies | Titles | Deals |
|-----------|--------|-------|
| 2 | 5 | 5 |

Co-Production and Co-Venture Deals

- 19 companies (53% of those who answered the question) indicated that they either signed, or began negotiating co-production or co-venture deals while at the 2008 EFM.
- 19 of these companies declared that 35 co-production or co-venture deals were either signed or would likely be signed as a result of discussions at 2008 EFM.
- 16 companies provided information about the value of co-production or co-venture deals - and reported that the deals were worth \$45,150,000.
- 13 companies provided information about the countries with which deals were made.
- Respondents reported that they participated in an average of 32 business meetings each while at the 2008 EFM.

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 | 3 | \$2,000,000 | Israel |
| 2 | 1 | \$500,000 | US |
| 3 | 4 | \$2,000,000 | |
| 4 | 1 | \$3,000,000 | Germany |
| 5 | 2 | - | |
| 6 | 2 | \$1,500,000 | Germany |
| 7 | 1 | \$10,000,000 | UK |
| 8 | 1 | \$4,000,000 | Ireland |
| 9 | 3 | \$3,000,000 | |
| 10 | 1 | \$1,000,000 | Brazil |
| 11 | 1 | \$200,000 | Israel |
| 12 | 2 | \$5,000,000 | |
| 13 | 0 | - | Brazil |
| 14 | 1 | \$1,500,000 | Ireland |
| 15 | 3 | \$8,200,000 | |
| 16 | 2 | \$300,000 | Germany |
| 17 | 2 | - | Spain |
| 18 | 3 | \$2,000,000 | |
| 19 | 2 | \$950,000 | Germany |

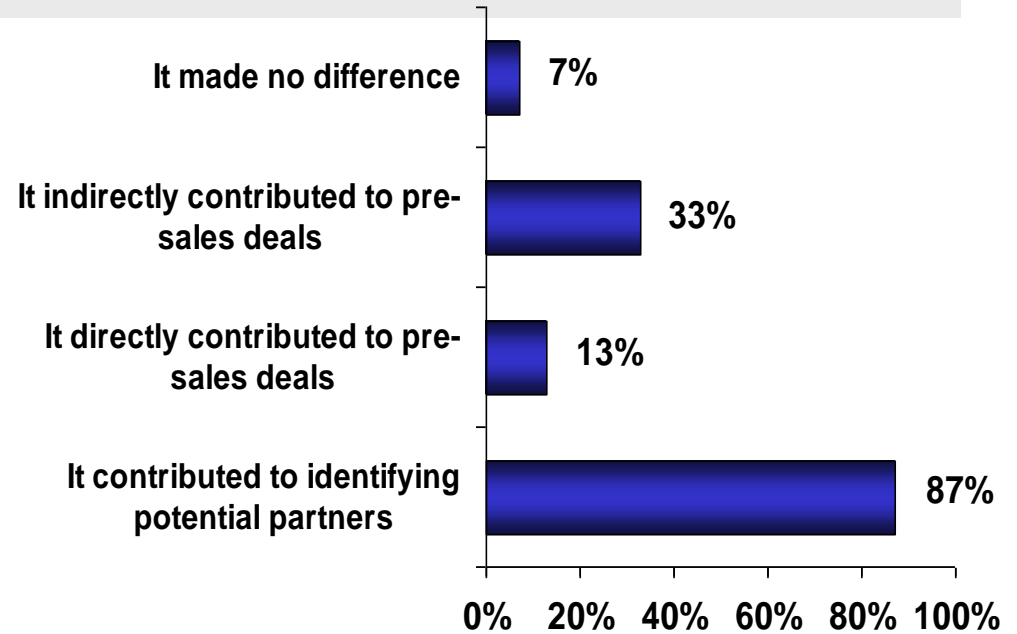
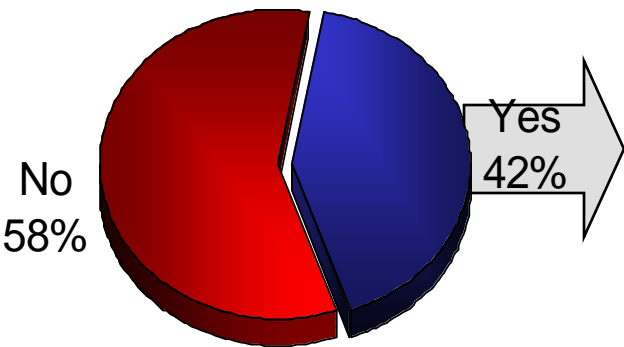
Co-Production and Co-Venture Deals by Company Region

| 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 | 2 | 3 | \$4,000,000 |
| Quebec | 5 | 10 | \$10,600,000 |
| Ontario | 10 | 19 | \$27,250,000 |
| Nova Scotia | 2 | 3 | \$1,500,000 |

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

Producers without Borders

- 15 respondents (42%) participated in the “Producers without Borders” initiative.
- The “Producers without Borders” initiative contributed mainly to identifying potential partners.

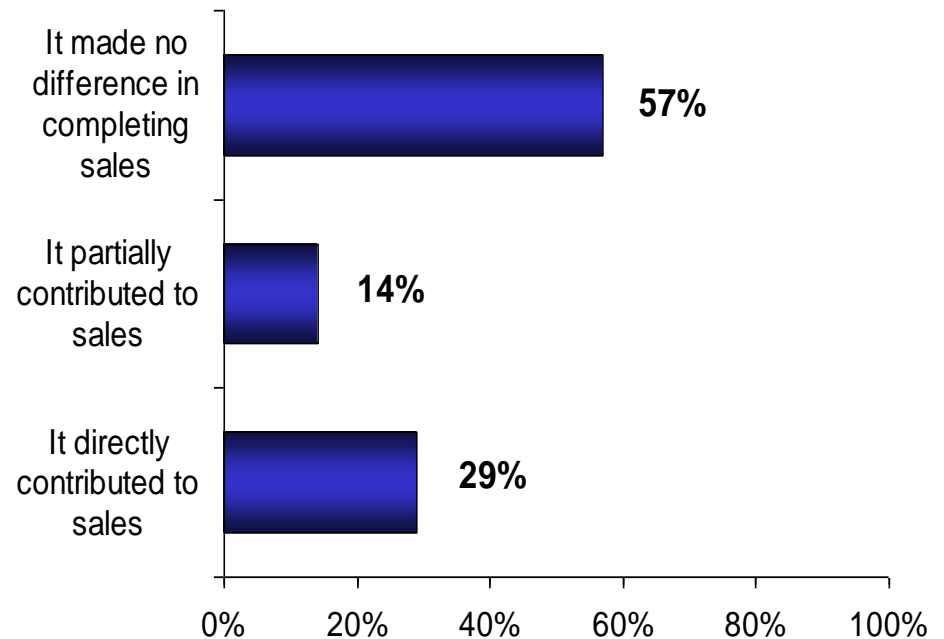
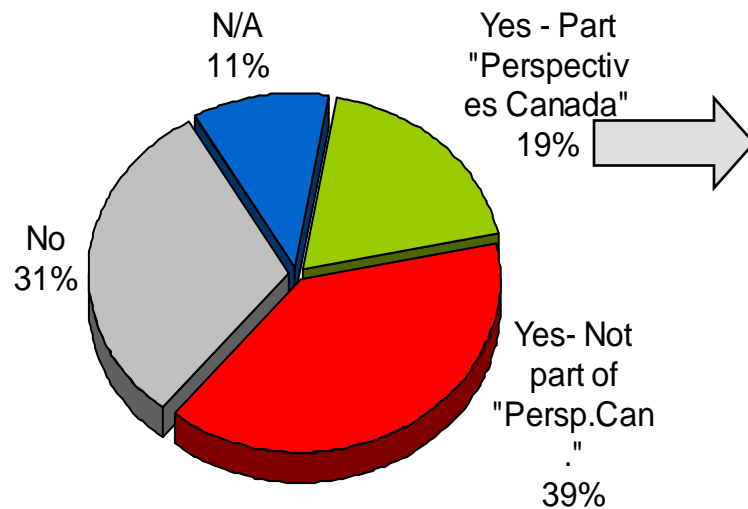


Q10a. Did you participate in the “Producers without Borders” initiative? (N=36)

Q10b. (IF YES TO Q10a) In what way did the “Producers without Borders” contribute to your experience at the EFM 2008 (N=15)

Title Screening

- 21 respondents (58%) indicated that they had a title screened at the 2008 European Film Market, but only 7 respondents (19%) had the titles screened as part of “Perspectives Canada”.

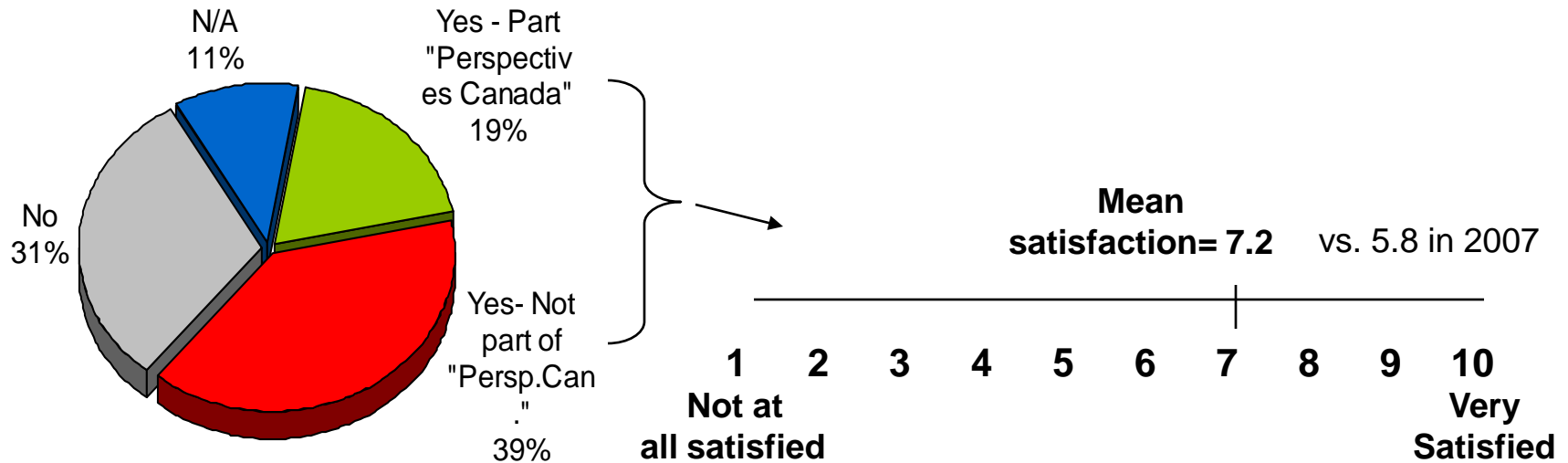


Q11. Were any of your titles screened at the 2008 EFM? (N=36)

Q12. (IF YES TO Q11a) In what way did the “Perspectives Canada” contribute to your sales activities (select one) (N=7)

Title Screening

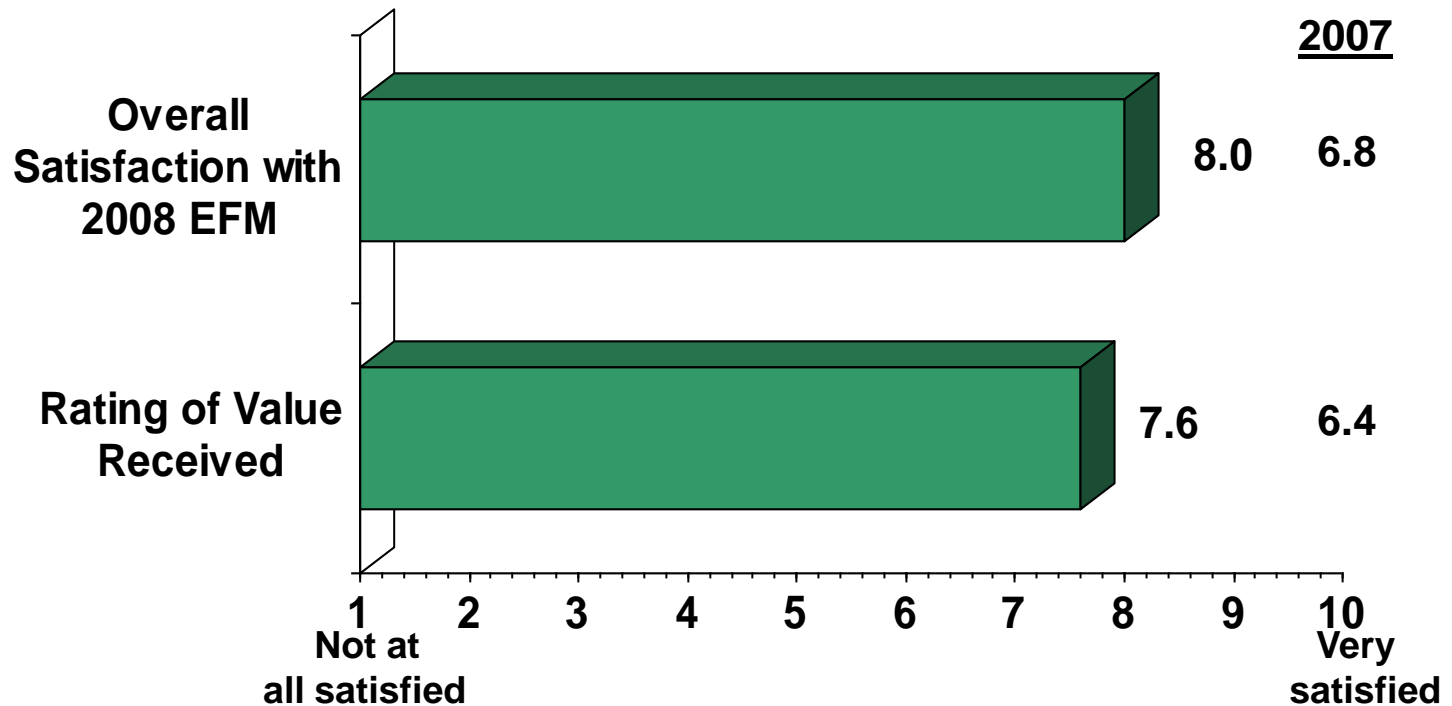
- The respondents who had the titles screened gave an average satisfaction score of 7.2 for the visibility their titles received from the screenings – a notable improvement over the 2007 results.



Q12. (IF YES TO Q11a,b) 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=20)

Overall Satisfaction With, and Value of, 2008 European Film Market

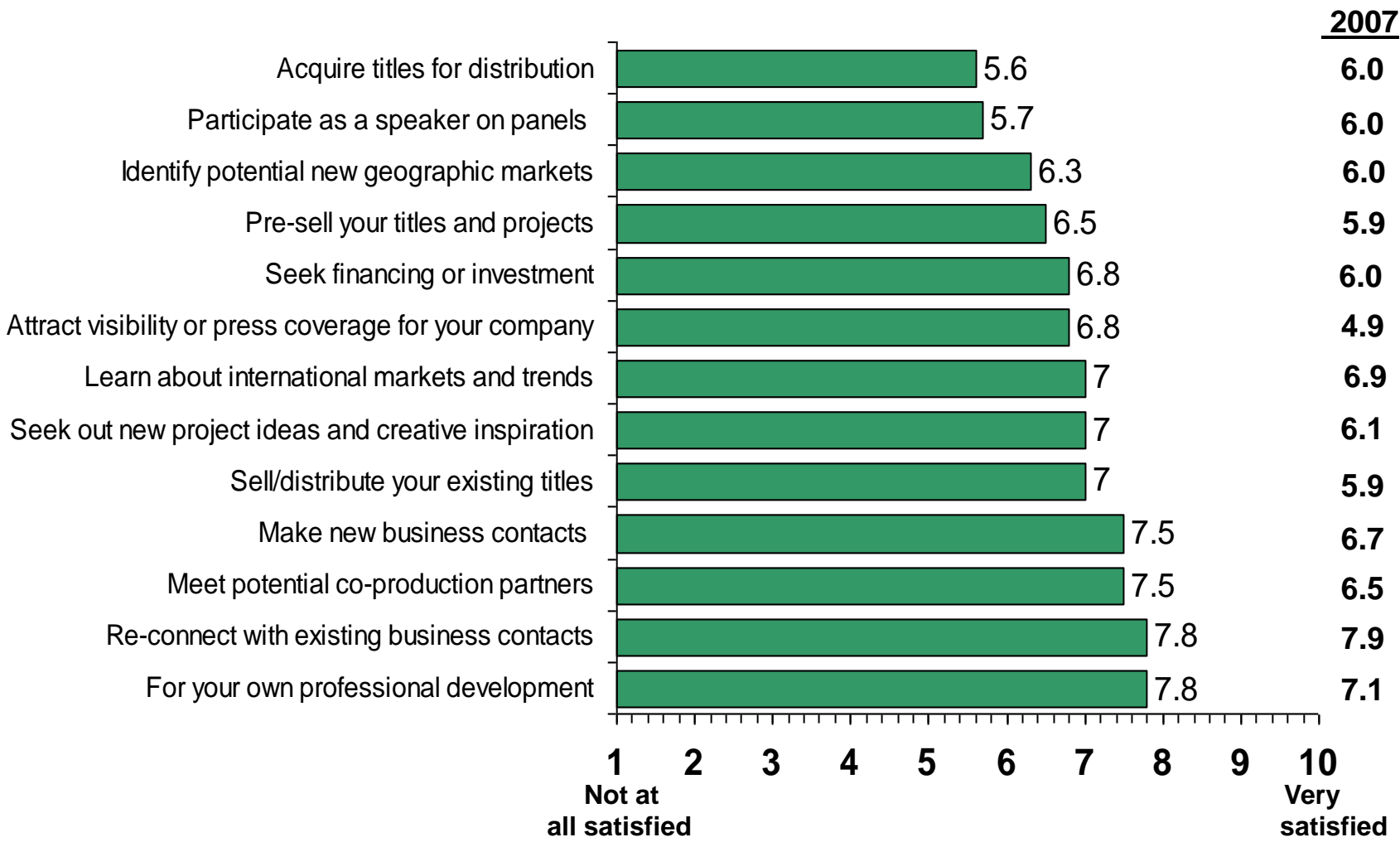
- Compared to EFM 2007, this year's EFM received considerably better scores.



Q13a. How satisfied would you say you were overall with the 2008 EFM 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. N=35

Q13b. And thinking about what it costs your company to attend, and the quality of the services and support provided at the 2008 EFM, how would you rate the VALUE you received on the same 1-10 scale...? N= 34

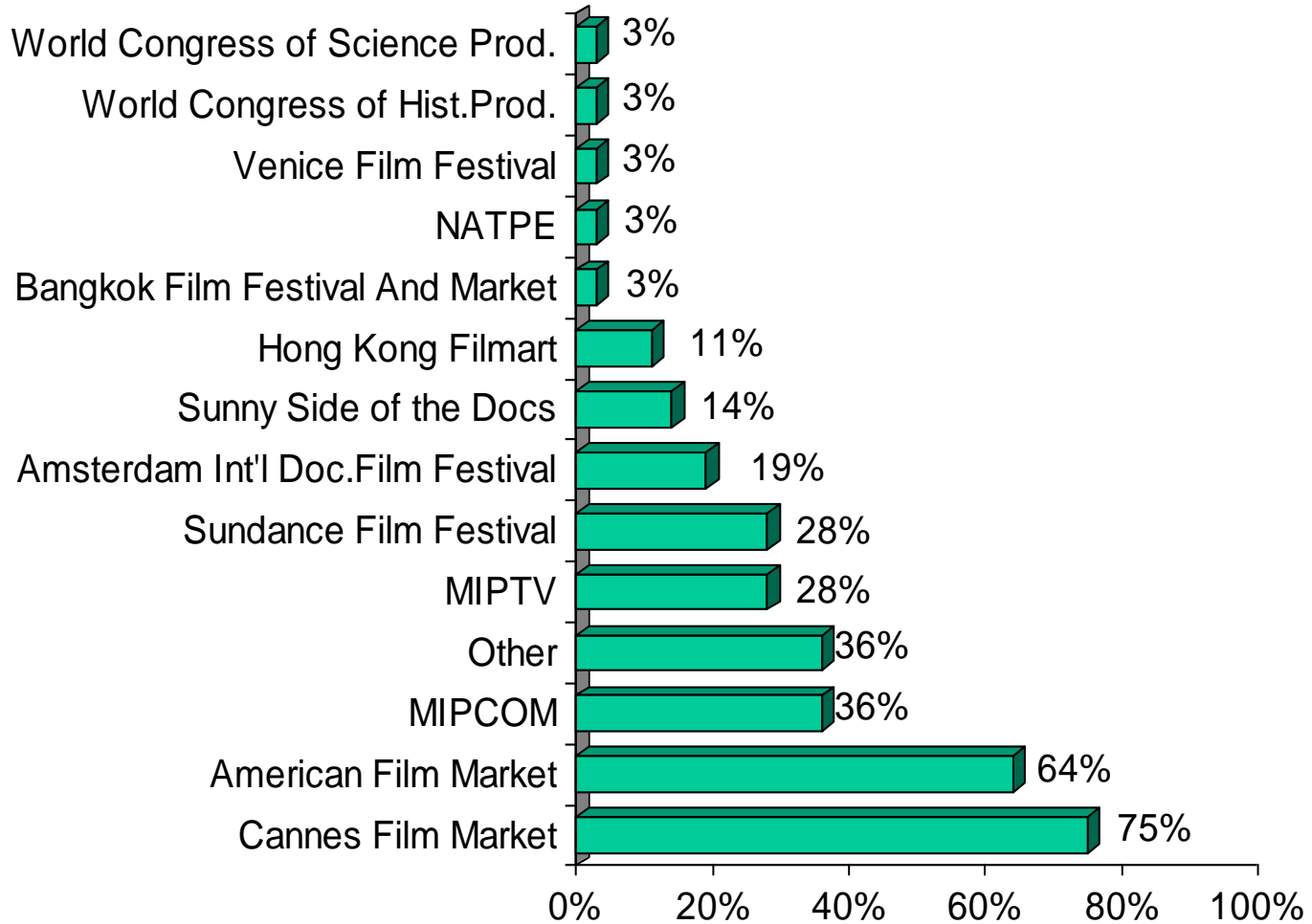
Satisfaction with 2008 European Film Market



Q13c. How satisfied were you with the 2008 EFM 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".

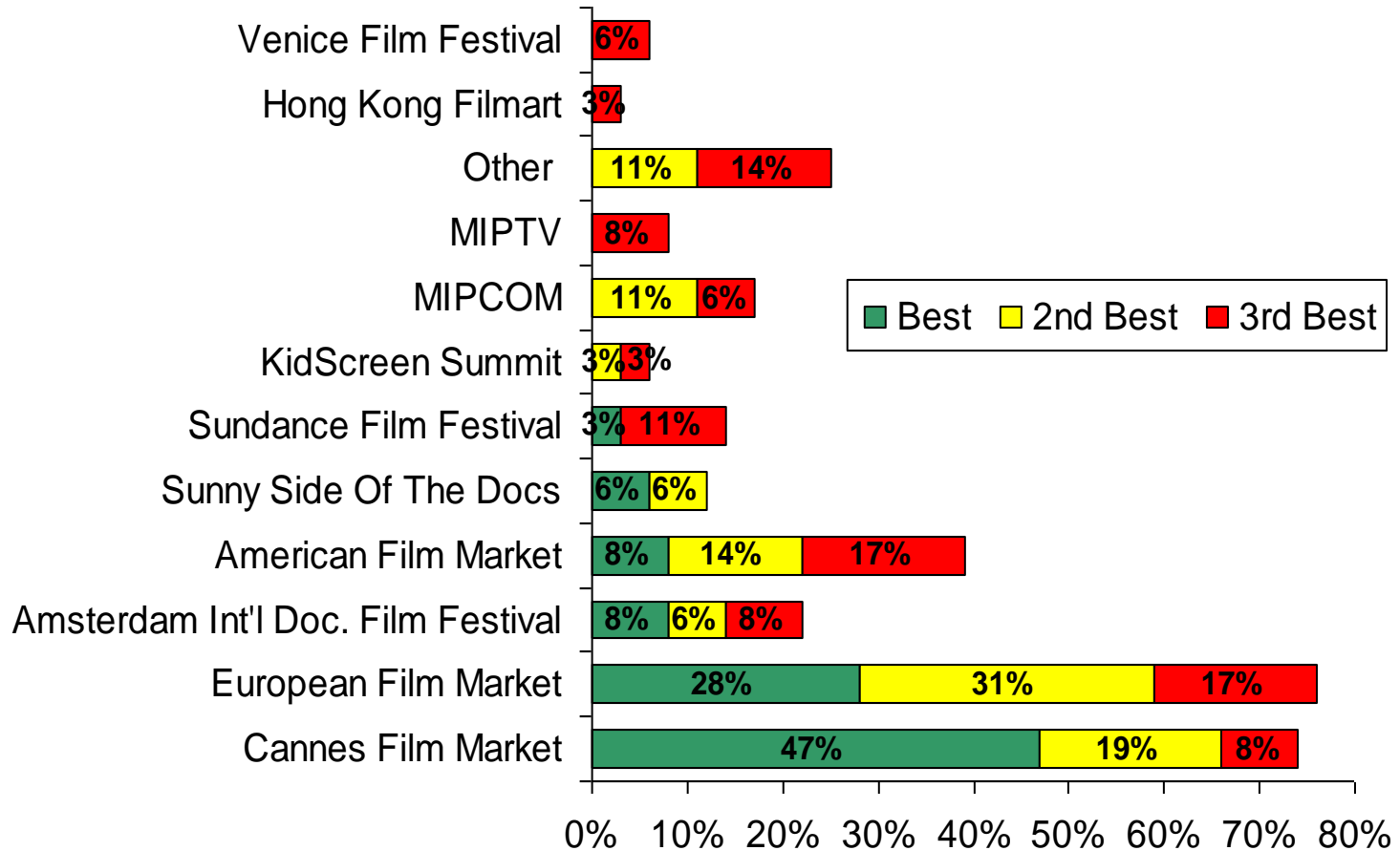


International Markets & Festivals Attended



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=36

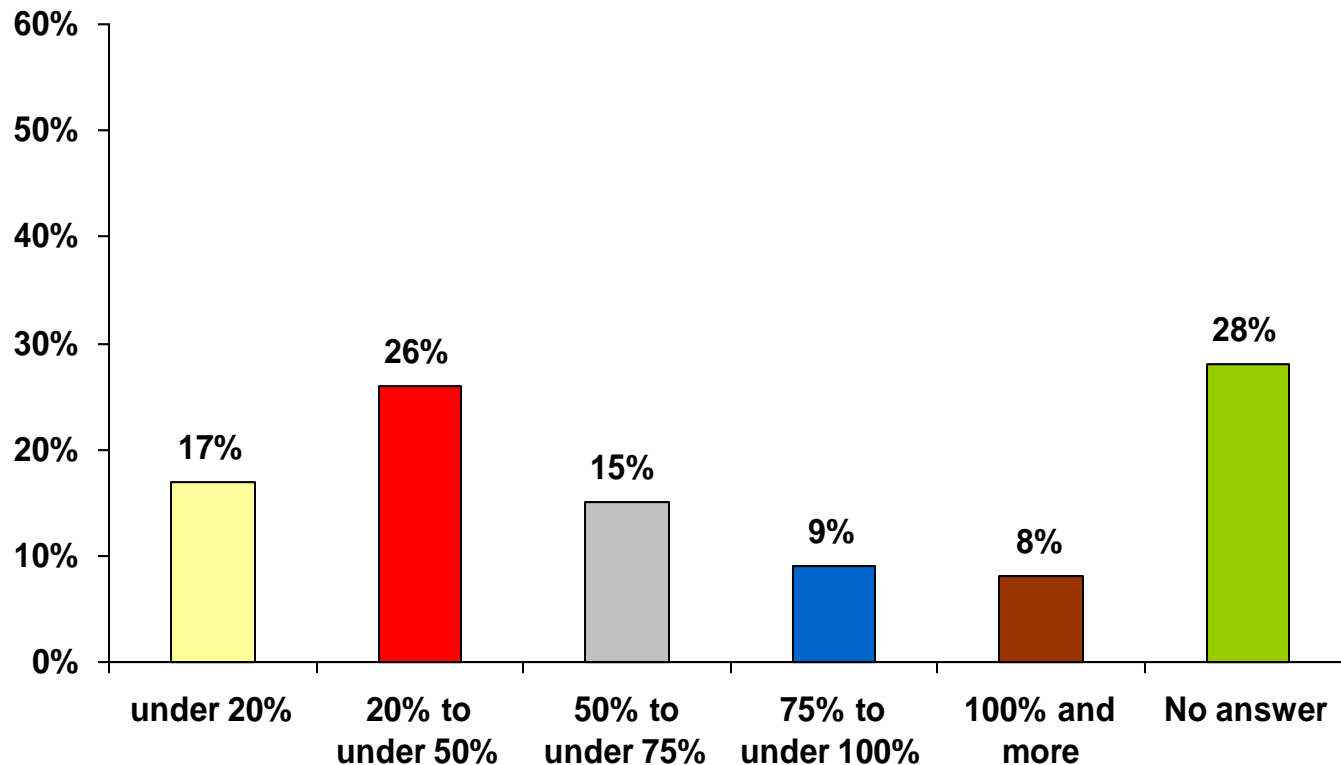
Rating of International Festivals & Markets



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=36

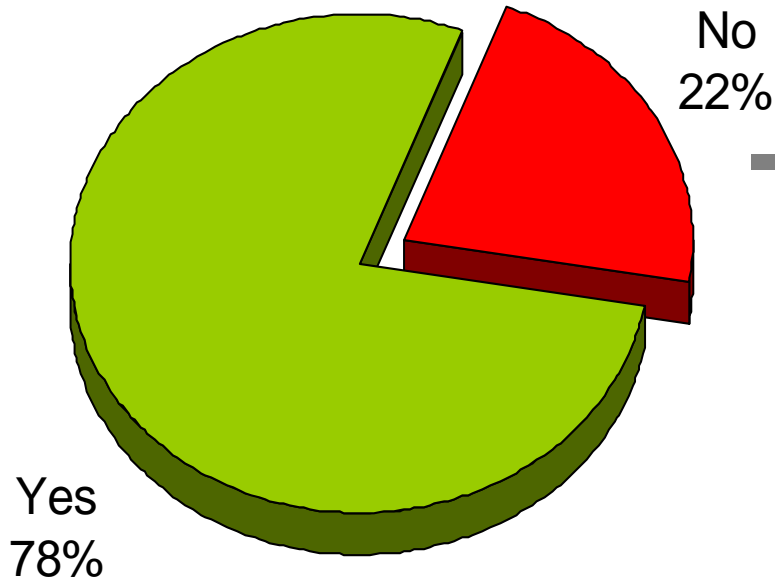
Percentage of sales from international sales



Q16. What percentage of your company's gross revenues in the most recent fiscal year came from international sales? N=36

Used Services of Canada Pavilion?

Used Canada Pavilion?



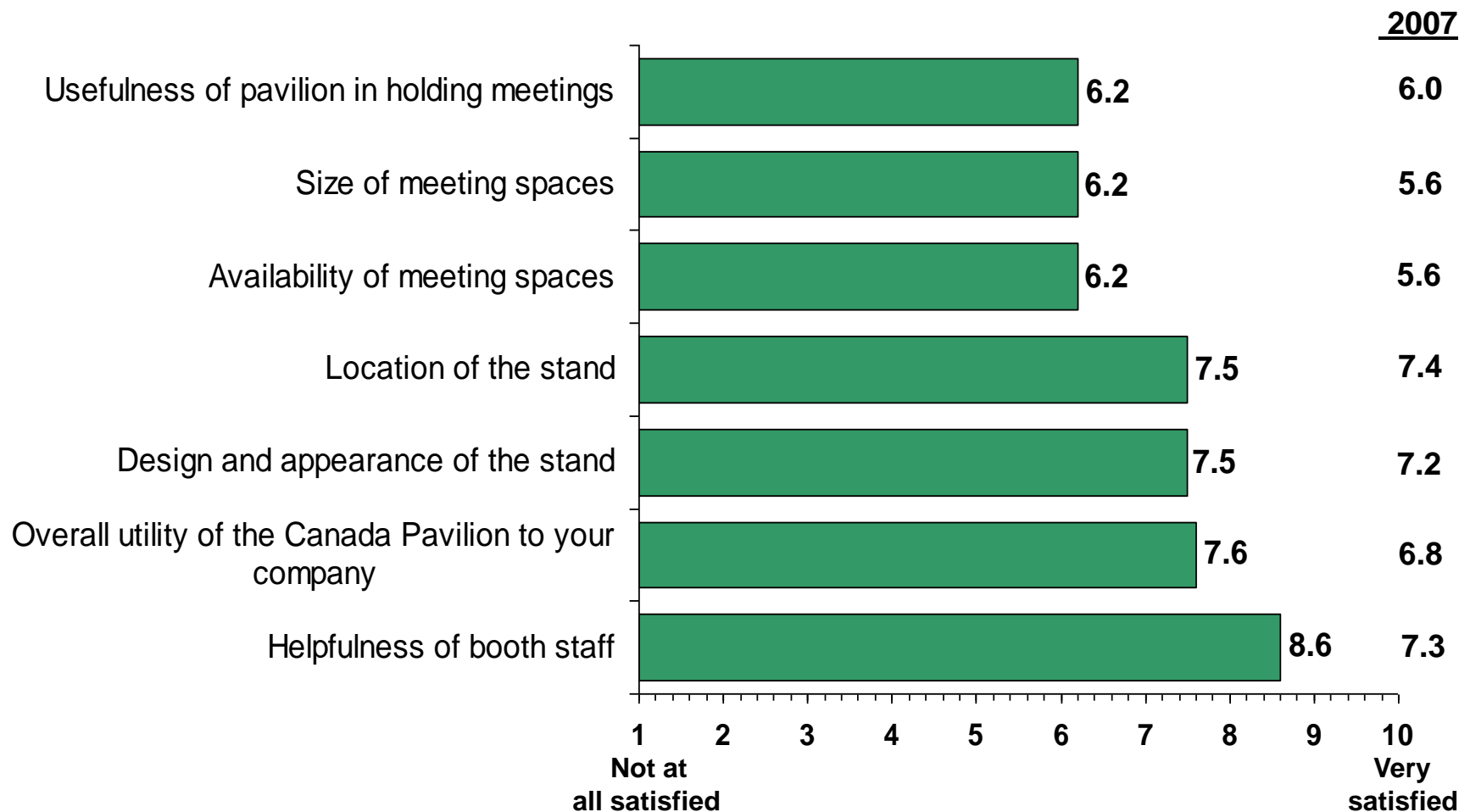
Why Not?

- *"We didn't have any need for them really this time."*
- *"Were not selling finished films. Met sales agents, potential co-producers and financiers for new projects either at their own stands or at hotels."*
- *"I didn't know I could !"*
- *"I had my own computer, set up my own meeting, didn't know how the co-pro things worked."*
- *"Didn't use them much. Better meetings came from the traffic at my distributor Maximum Films' Stand."*

Q17 Did you use the services provided by the Canada Pavilion at the 2008 EFM?
N=28

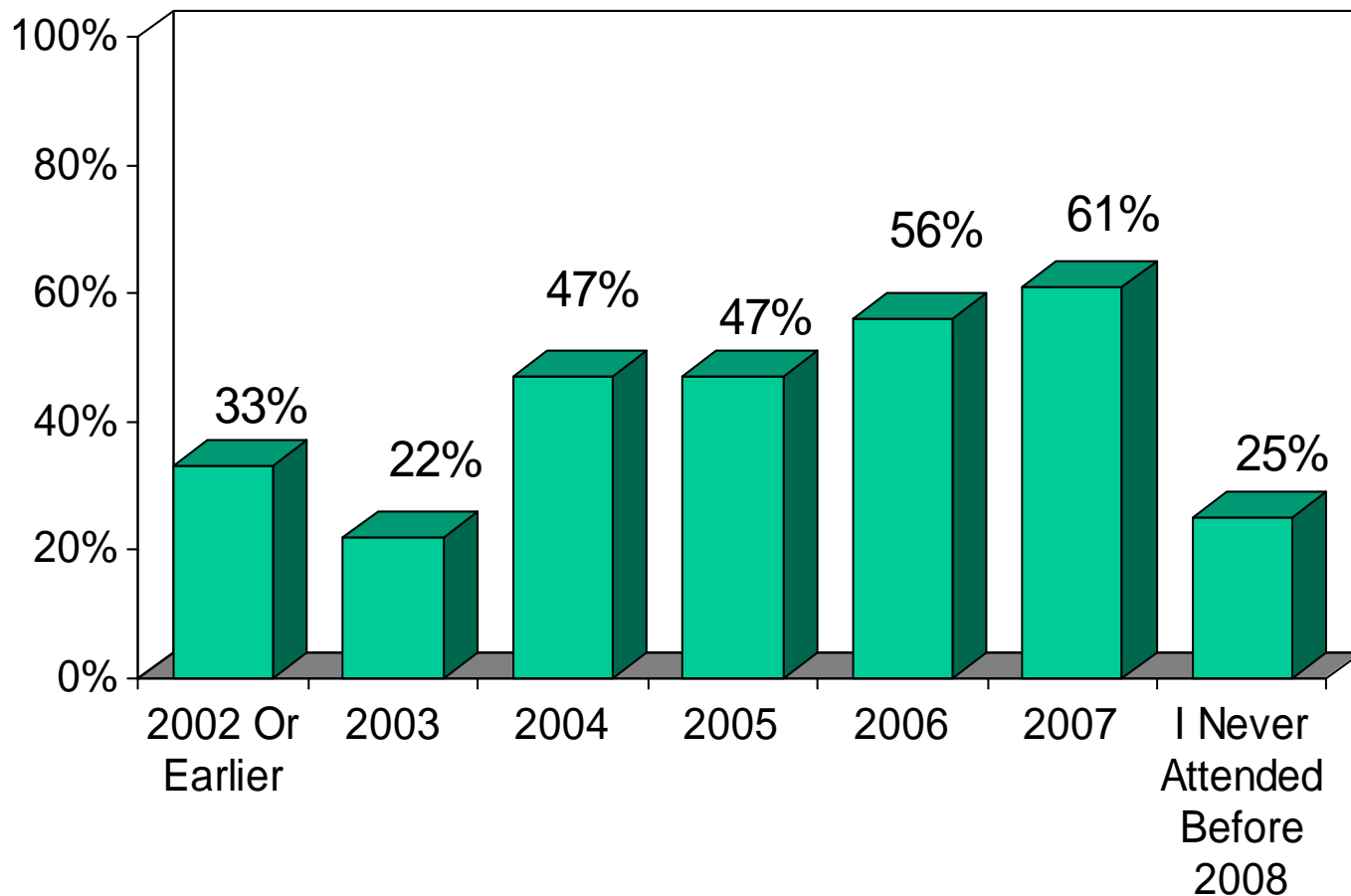
Q18 (IF "NO" TO Q17) Why didn't you use the services provided at the Canada Pavilion? N= 8

Satisfaction with Canada Pavilion



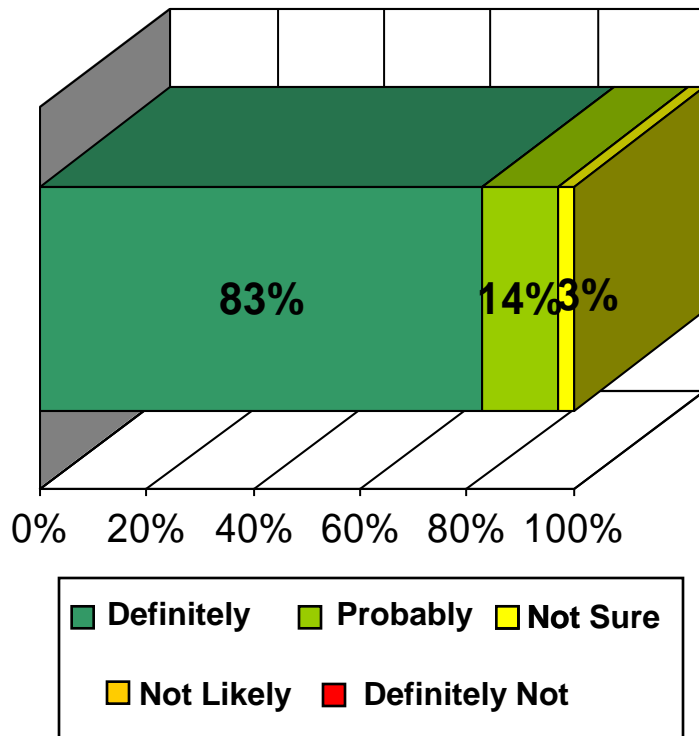
Q19 (THOSE WHO DID USE THE CANADA PAVILION) Please rate your level of satisfaction with each of the following aspects of the Canada Pavilion at the 2008 EFM using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. If a particular item does not apply, select "not applicable." N= 28

Past Attendance at EFM



Q21. Which previous European Film Markets, if any, has your company attended? *Select all that apply*
N=36

Likelihood of, and Reasons for, Recommending EFM to Others



- *“Efficient market particularly in respect of presence of industry interested in independent filmmaking.”*
- *“Extremely varied delegates and a good forum to meet new and existing contacts. Real focus on the business of film.”*
- *“For the kind of films I'm working with, it's the best place to meet everyone.”*
- *“It's a good opportunity to meet with buyers and co-producers, particularly from Europe, and is well situated in time between the AFM and Cannes.”*
- *“EFM is the best managed, least crowded and easiest film market .”*
- *“Excellent industry representation. Good location.”*
- *“EFM really is the best gathering for the independent feature filmmakers.”*
- *“It's an excellent mix of market and festival. More for film than TV; Must have right connections.”*

Q22a. Would you recommend the European Film Market to other companies in the Canadian audio-visual industry? N=36

Q22b. Please explain your answer.

Cost of Attending EFM 2008 and Funding Received

- Companies incurred an average cost of \$8,698 in attending the 2008 European Film Market.
- 56% of respondents (20 companies) indicated that they received funding support from Telefilm.
- Eight companies reported receiving federal funding ranging in amount from \$1,000 to \$18,000. The median amount was \$4,375.
- Fourteen companies indicated that they had received provincial funding ranging in amount from \$1,000 to \$10,000. The median amount was \$2,785.

Q24. Did you receive any funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend the 2008 EFM? N=36

Q25. What amount of funding support did you receive from the federal government and from the provincial government?

Other Comments

- *“A valuable experience with excellent support from Telefilm staff .”*
- *“Overall great experience.”*
- *“Once again, the Telefilm Festivals and Markets team did an exemplary job of coordinating a Canadian presence in what is probably the most important international market for independents.”*
- *“The advisor beforehand was useful. An increase in her services further in advance would be helpful.”*
- *“Je trouve que le EFM se developpe a un bon rythme.”*
- *“More support for Canadian titles.”*
- *The facilitators could have been more visible and useful - the meet and greet at the Canadian embassy was pretty useless - too much noise and confusion to really engage in a conversation or initiate real dialogue.”*

Q26. Finally, please provide any other comments you have on the 2008 European Film Market or suggestions for improving the support provided by Telefilm and its partners.

Summary of Findings

Summary of findings

- It appears that the participants at the 2008 EFM did enjoy a successful market:
 - More than eight in ten (86%) of participating companies either completed sales, or began discussions that are likely to lead to sales while at the event.
 - Forty-six percent either completed pre-sales, or began discussions that are likely to lead to pre-sales.
 - Over half of respondents (53%) either signed or began negotiating co-production or co-venture deals.
 - 42% participated in the “Producers without Borders” initiative, and they saw it mainly as a medium for identifying potential partners.
 - Nearly six-in-ten (58%) indicated that they had their title screened as a part of the “Perspectives Canada” initiative, and of those 57% thought it made a difference in completing sales.

Summary of findings

- Compared to the previous year, respondents' satisfaction with the market was notably higher, at 8.0 out of 10 (vs. 6.8 in 2007).
- The same was true for the rating of value for money, on which the 2008 EFM scored 7.6 (vs. 6.4 a year ago).
- Participants were most satisfied with the 2008 EFM as a source of professional development (7.8 out of 10) and in terms of reconnecting with existing business contacts (7.8 out of 10).
- The participating companies were least satisfied with acquiring titles for distribution (5.6 out of 10).

Summary of findings

- More than three-quarters (78%) of respondents used the services provided by the Canada Pavilion at the 2008 EFM.
- They rated their satisfaction with the overall utility of the Canada Pavilion quite high, as 7.6 out of ten; higher than last year (6.8 out of 10).
- Participants were most satisfied and dissatisfied with the following aspects of the Canada Pavilion (NB; the same elements as in the previous year):
 - The helpfulness of booth staff (8.6)
 - The design and appearance of the stand (7.5)
 - The location of the stand (7.5)
- They were less satisfied with the stand in terms of being able to conduct meetings there. Specifically:
 - The usefulness of Pavilion in holding meetings (6.2)
 - Size and availability of meeting spaces (6.2 each)

Summary of findings

- Many participants indicated that they found the Canada Pavilion to be lacking appropriate space, as well as quiet areas to conduct meetings.
- Some participants also commented on improving the wireless networking capabilities at the Canada Pavilion.
- There was also a suggestion that a more interactive forum be established to encourage more networking among participants.



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