2008 MIPCOM Outcomes Report

Prepared For:

Telefilm Canada

January 2009

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Methodology

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- A total of 74 e-mailed invitations were sent to Canadian companies that attended the MIPCOM 2008.
- 55 of the 74 companies completed the survey – a 74% response rate, down by 8 points from last year.
- The survey was open from November 5th, 2008 until January 13th, 2009.
- During the course of the survey, multiple attempts were made to follow up with non-responding companies through e-mail and telephone calls to encourage them to participate.

Methodology

E-mail invitations sent to 74 companies

↓

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

↓

55 companies reached
the end of the survey

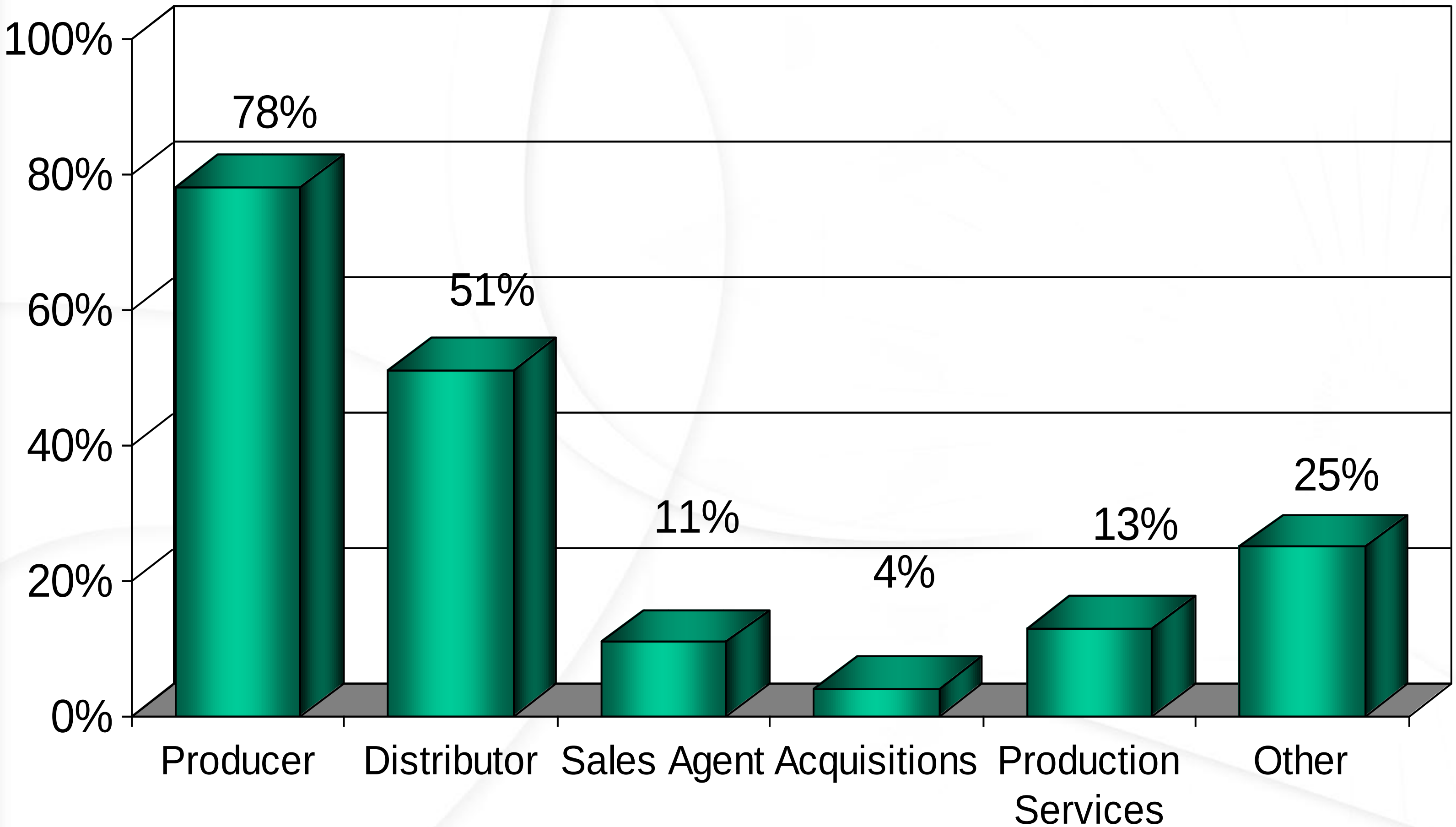
Sample and Respondents by Province

- **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	**17**	**10**	**9**
Ontario	**34**	**28**	**27**
British Columbia	**16**	**16**	**14**
Nova Scotia	**2**	**1**	**1**
PEI	**1**	**1**	**1**
Alberta	**2**	**1**	**1**
Saskatchewan	**2**	**2**	**2**
Total	74	59	55

Respondent Profile

Primary Business Focus of Company



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

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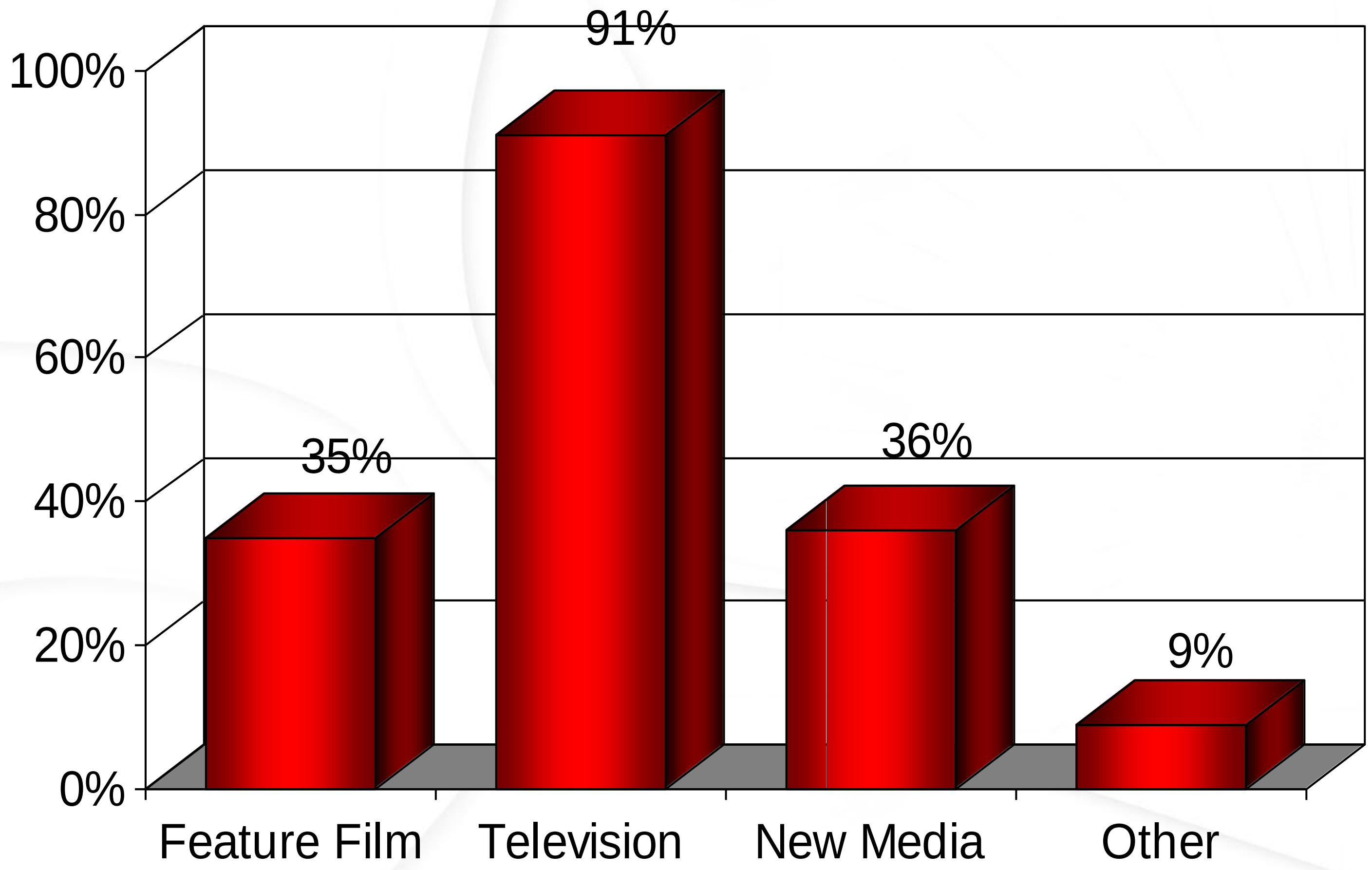
Main Format(s) of Interest



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

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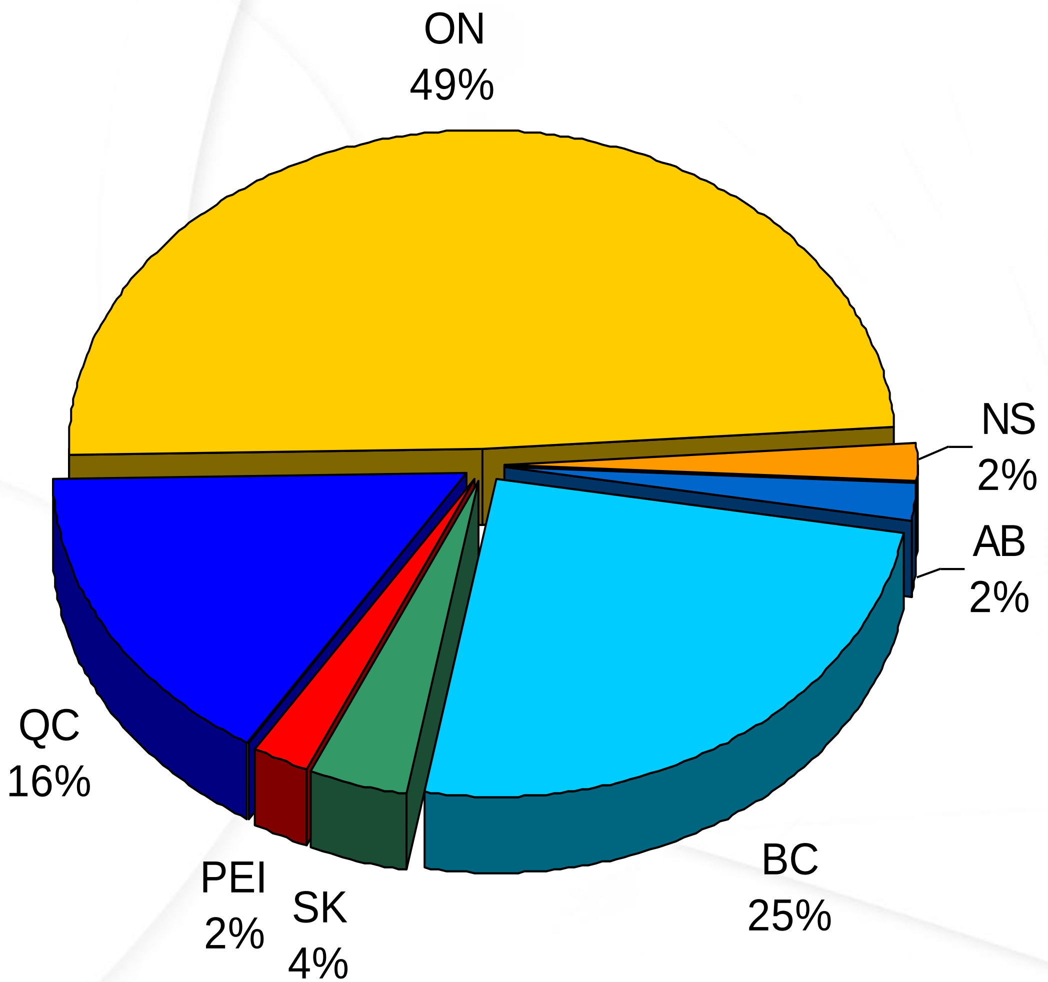
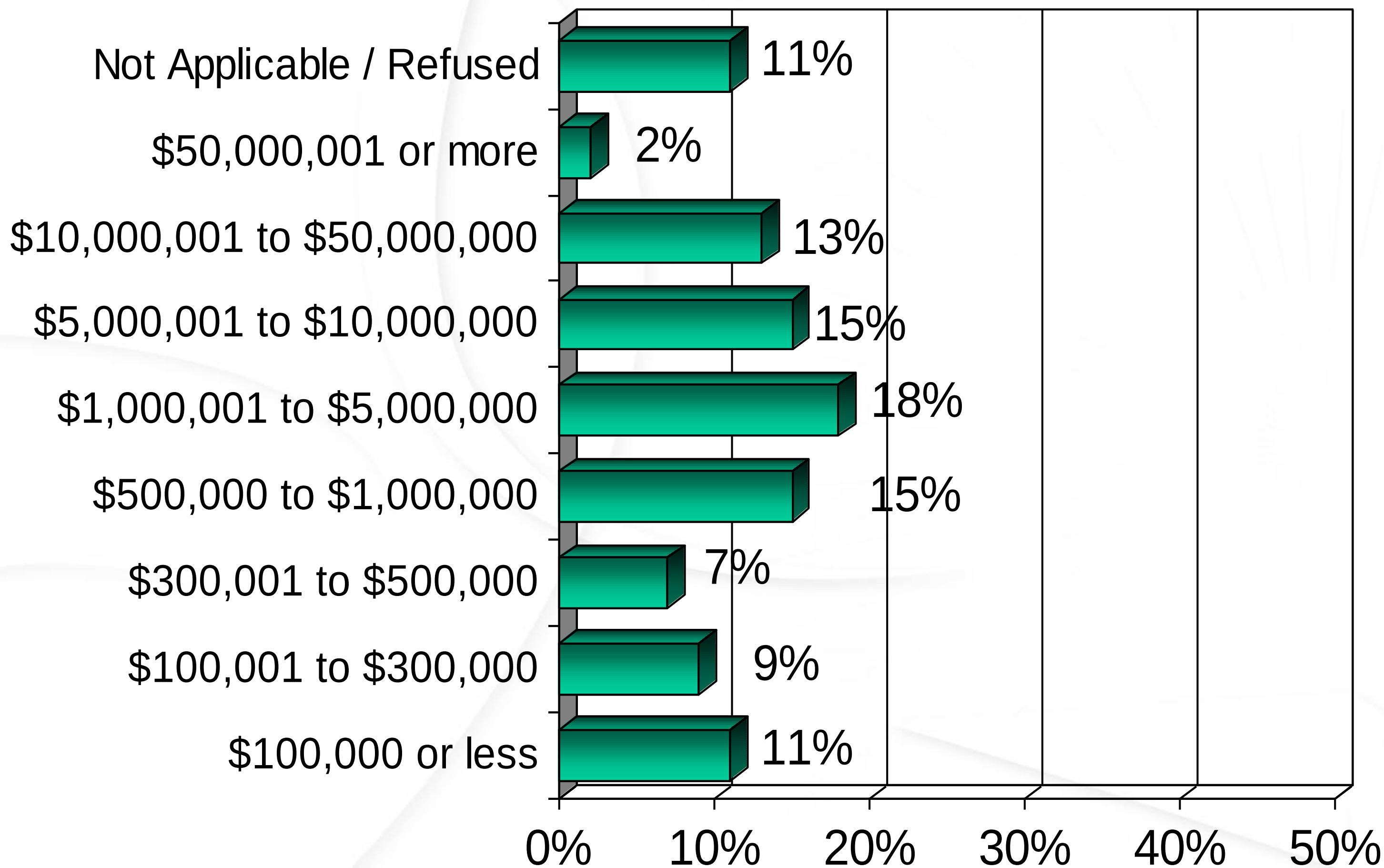
Location of Head Office



Q3. In which province/territory is your head office located? n=55

Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?
n=55

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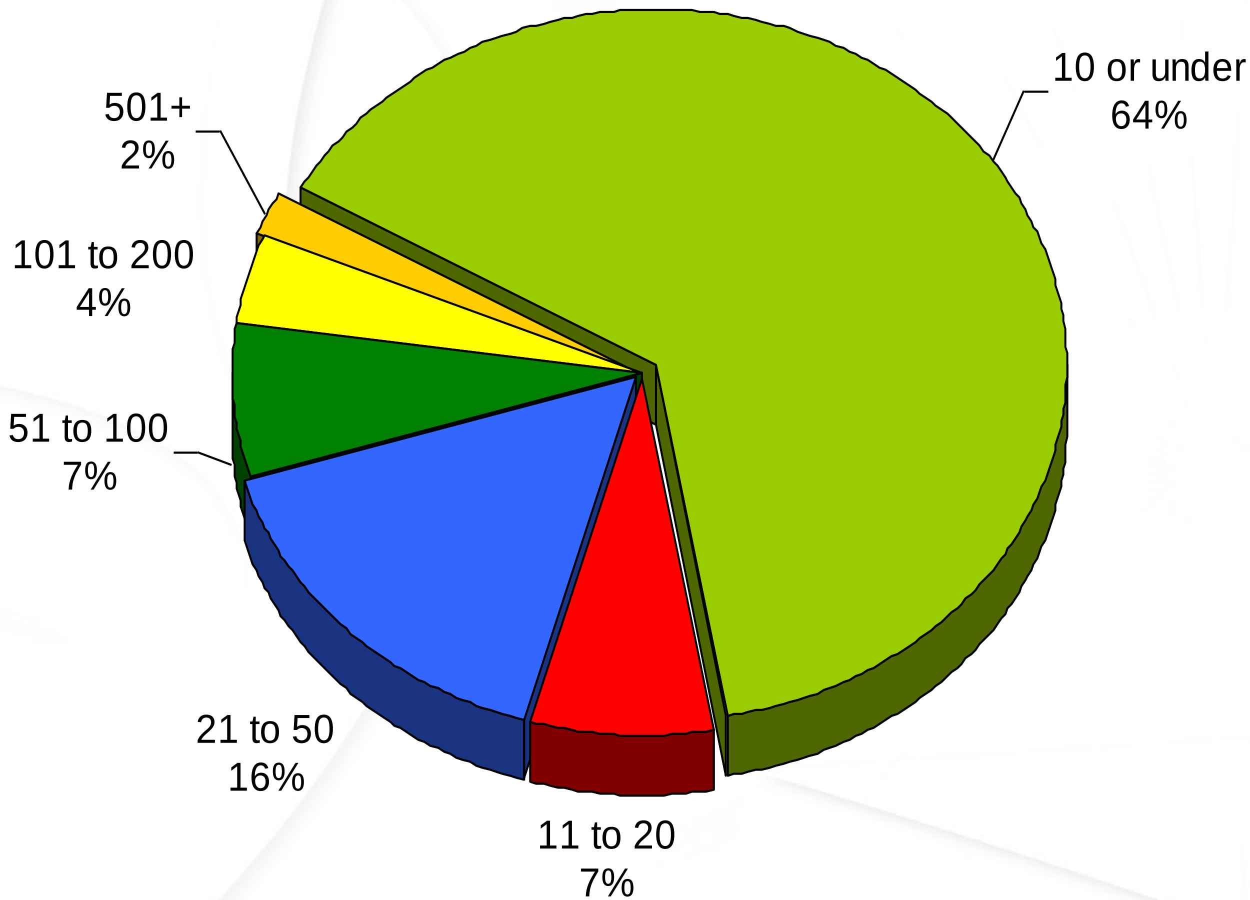
Number of Employees



Q5. How many full-time employees are there currently in your company?
n=55

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The Market

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

	Genre (Q6)	Feature Film	Television	New Media
Drama	81%	15%	31%	4%
Horror/Thriller	9%	7%	2%	0%
Comedy	31%	4%	27%	9%
Action/Adventure	18%	4%	13%	4%
Documentary/Educational	55%	11%	51%	4%
Animation	44%	11%	40%	16%
Public Affairs	2%	0%	2%	0%
Children's Programming	55%	7%	53%	18%
Romantic	2%	0%	2%	2%
Science Fiction	9%	4%	7%	0%
Sports	7%	2%	5%	0%
Lifestyle	36%	0%	33%	4%
Reality	31%	0%	31%	7%
Performing Arts	13%	0%	13%	4%
Other	5%	2%	2%	5%

Q6. In deciding to attend MIPCOM 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=55

Sales/Pre-Sales

- Forty-six (84%) companies indicated that they either completed sales while at MIPCOM 2008 or began discussions that are likely to lead to sales.
- Twenty-five (45%) companies indicated that they either completed pre-sales while at MIPCOM 2008 or began discussions that are likely to lead to pre-sales.
- Of these, 31 companies provided information on 141 deals involving 88 titles.
- Companies reported that 27 distribution agreements were signed.
- Respondents reported that $1,875,724 of sales were completed while at MIPCOM and that $14,032,818 worth of sales are likely to occur as a result of discussions initiated at the market.
- No presales figures were reported, but respondents expect $22,359,123 worth of pre-sales to occur as a result of discussions initiated at MIPCOM 2008.

Breakdown of Sales and Pre-Sales Deals (2007 data in brackets)

Sales

26 Companies (29)

70 Titles (106)

95 Deals (132)

$1,875,600 Sales completed while at MIPCOM 2008 ($1,069,300)

$14,032,604 Sales likely to occur as a result of discussions completed while at MIPCOM 2008 ($16,382,620)

Pre-Sales

18 Companies (13)

18 Titles (18)

31 Deals (21)

$0 Pre-Sales completed while at MIPCOM 2008 ($1,238,000)

$22,359,123 Pre-Sales likely to occur as a result of discussions completed while at MIPCOM 2008 ($16,418,000)

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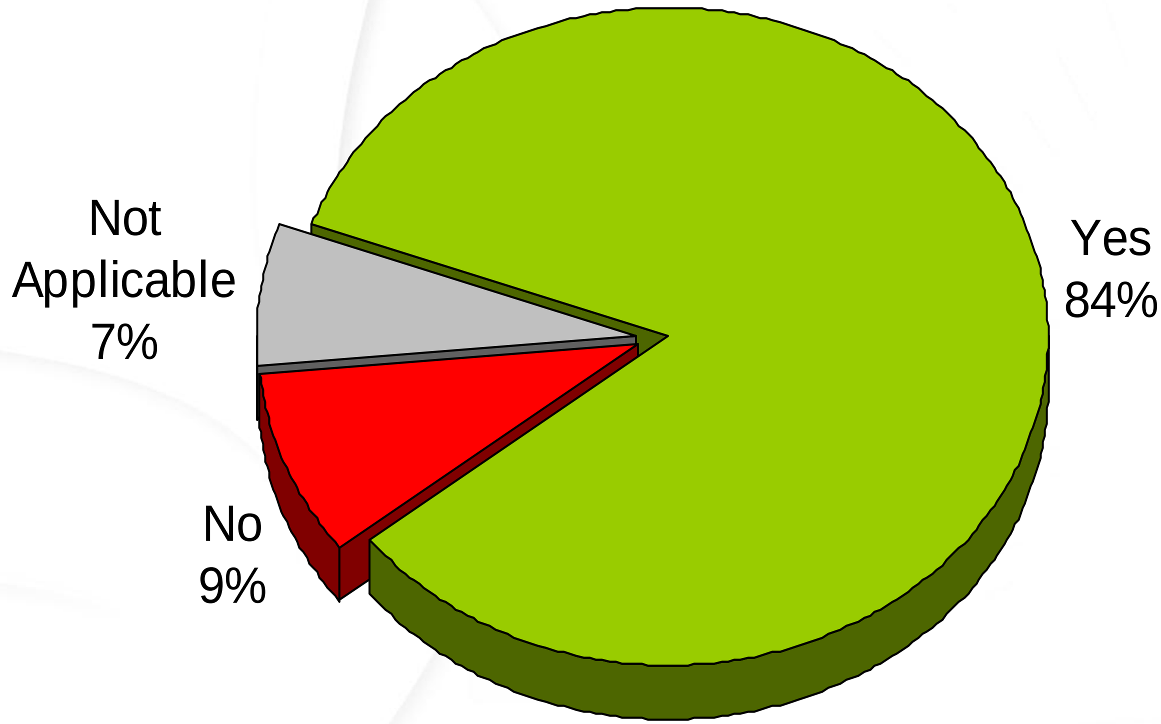
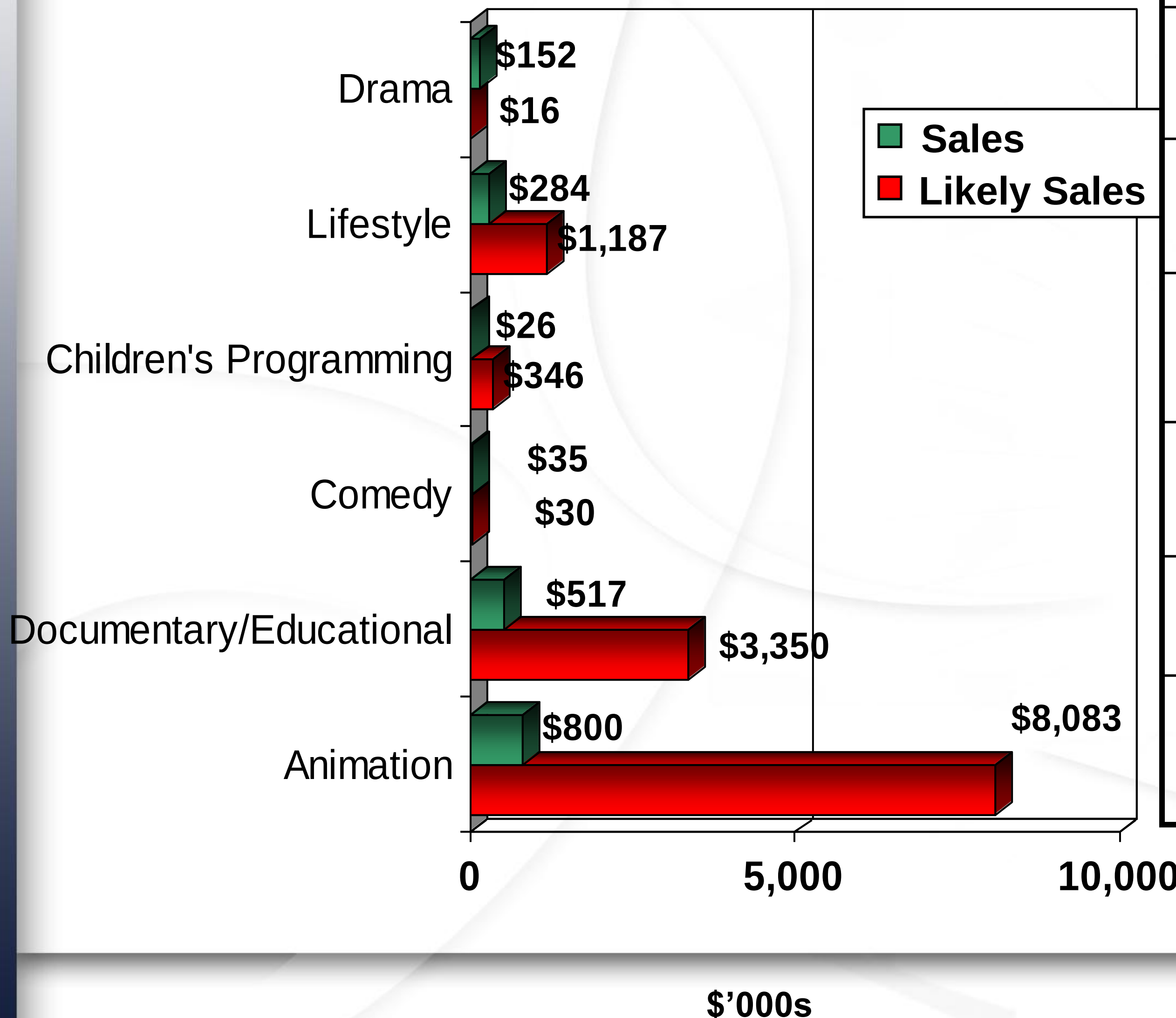
Sales



Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at MIPCOM 2008? n=55

Breakdown of Sales and Likely Sales by Genre



Companies	Titles	Deals
4	4	4
5	12	21
3	4	6
2	2	2
11	22	31
9	12	14

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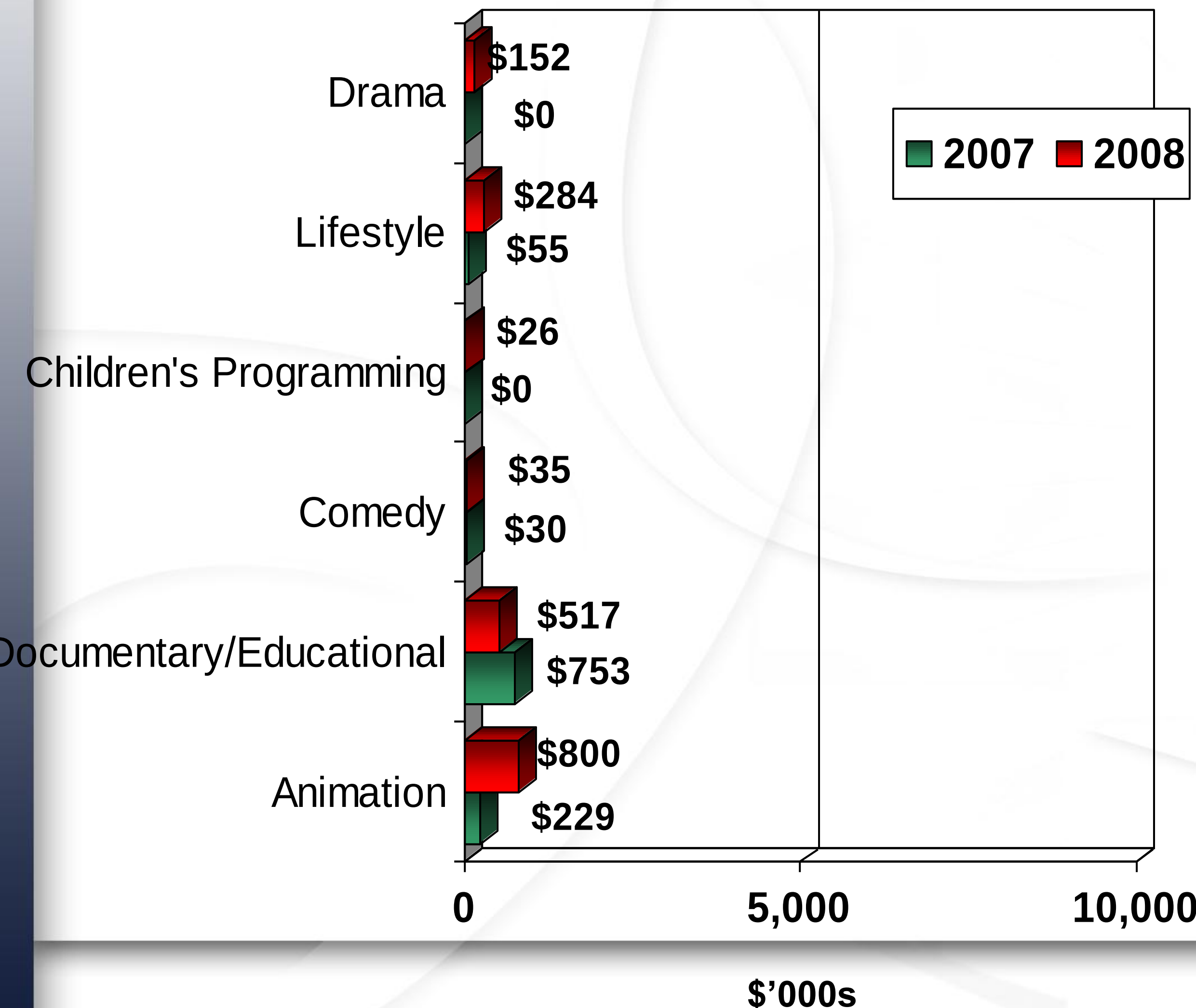
Breakdown of Sales by Genre: Tracking from 2007



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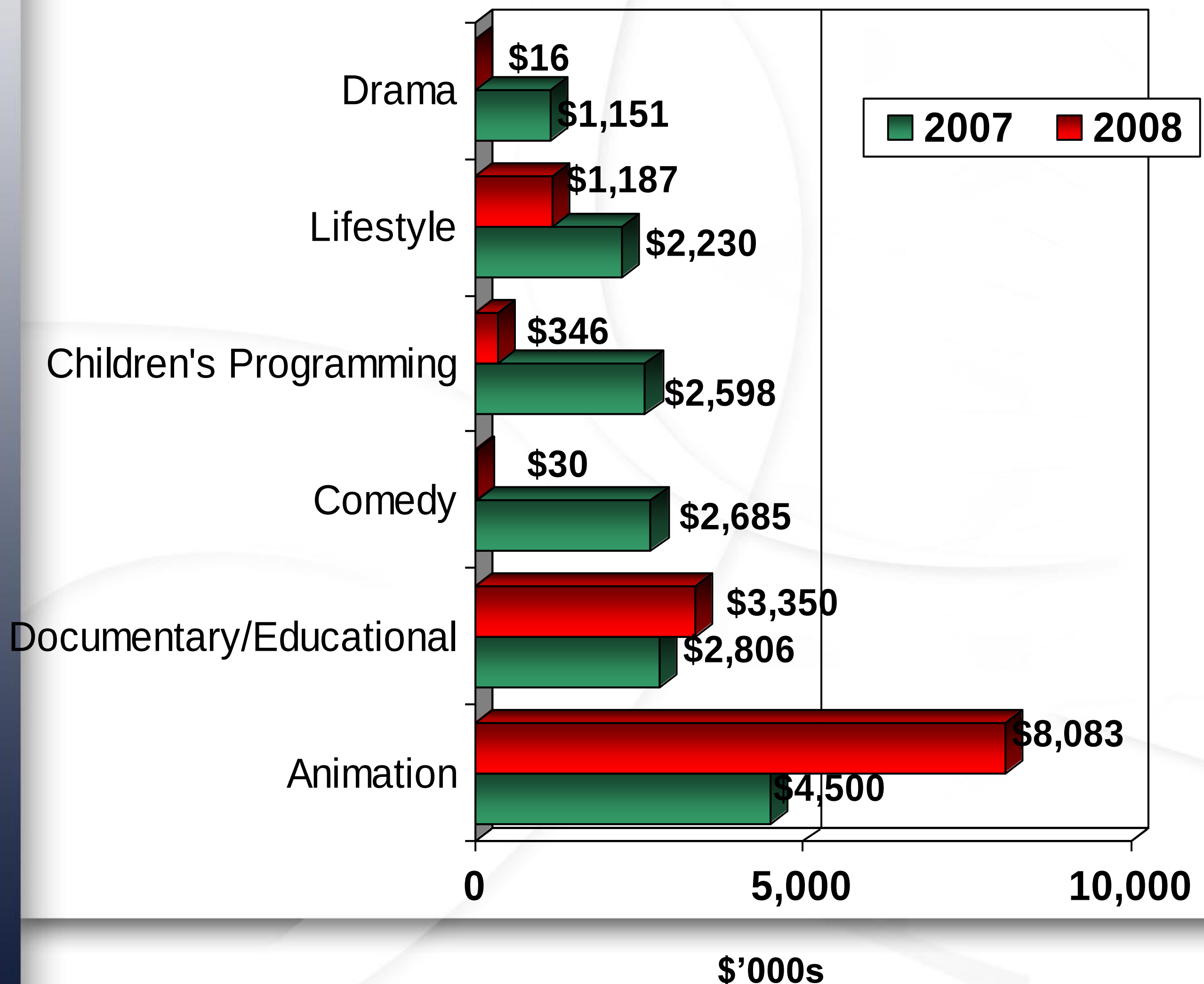
Breakdown of Likely Sales by Genre: Tracking from 2007



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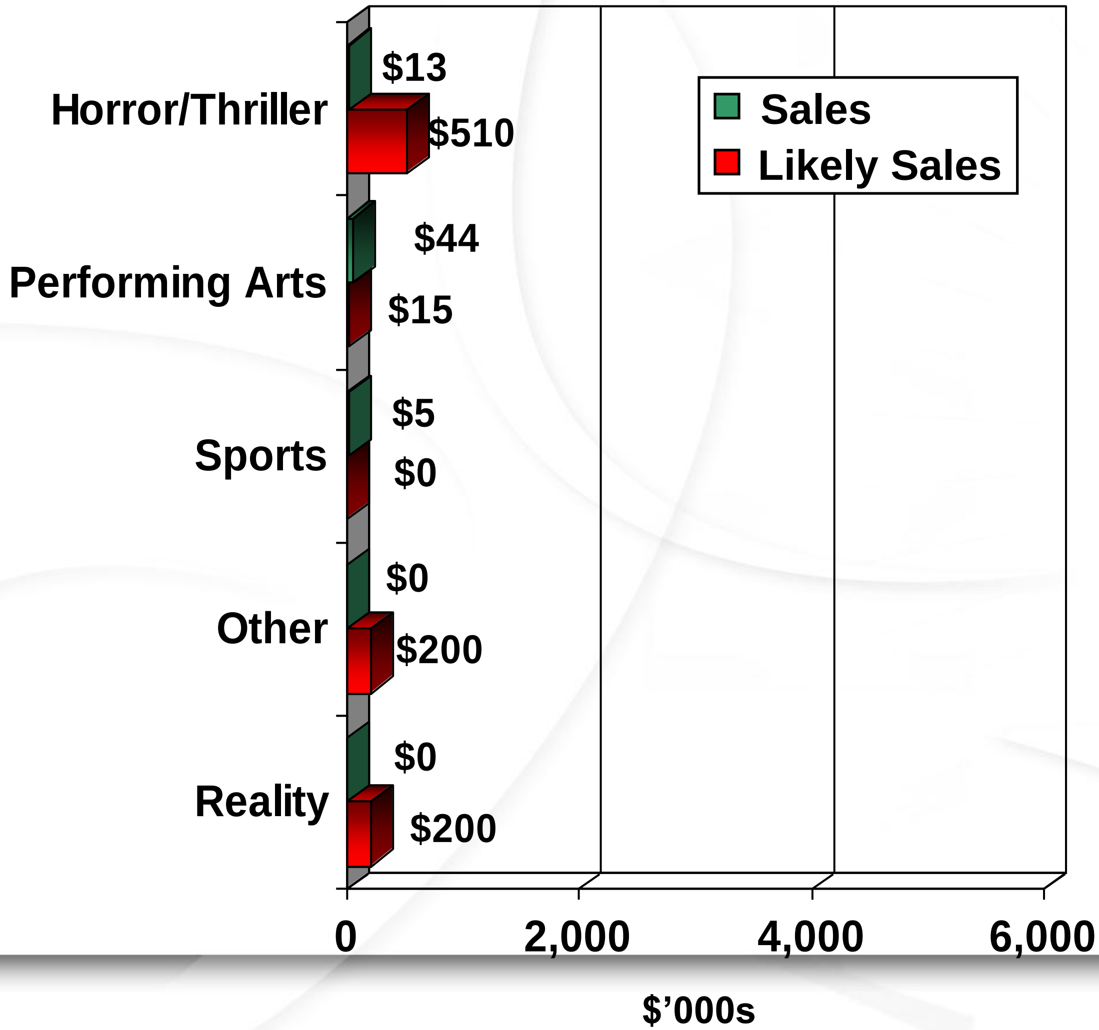
Breakdown of Sales by Genre: Tracking from 2007

	Companies		Titles		Deals	
	2007	2008	2007	2008	2007	2008
Drama	**5**	**4**	**5**	**4**	**5**	**4**
Lifestyle	**12**	**5**	**26**	**12**	**33**	**21**
Children's Programming	**3**	**3**	**8**	**4**	**13**	**6**
Comedy	**5**	**2**	**6**	**2**	**9**	**2**
Documentary/Educational	**16**	**11**	**34**	**22**	**35**	**31**
Animation	**7**	**9**	**15**	**12**	**21**	**14**

Breakdown of Sales and Likely Sales by Genre (cont'd)



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

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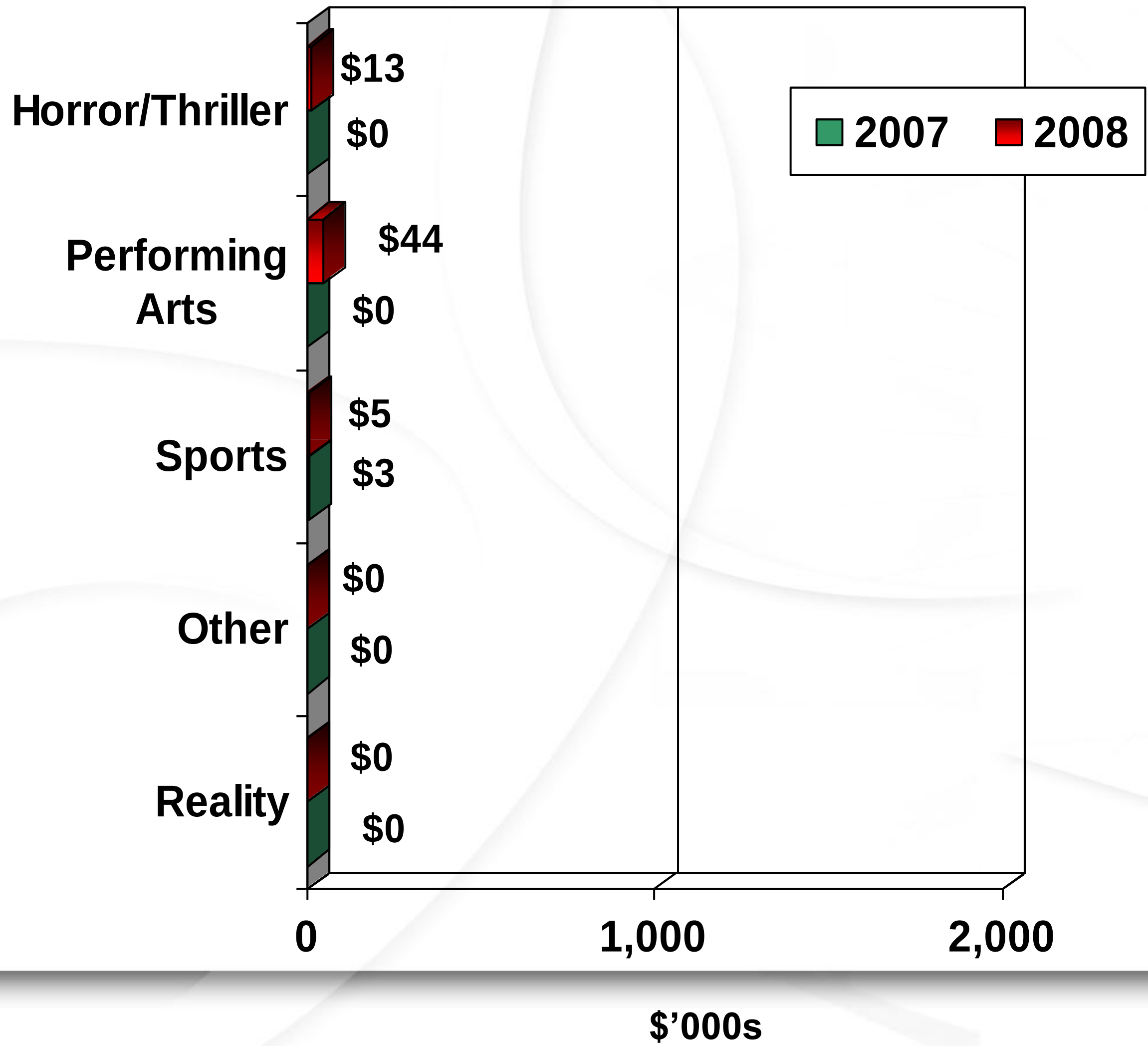
Breakdown of Sales by Genre (cont'd): Tracking from 2007



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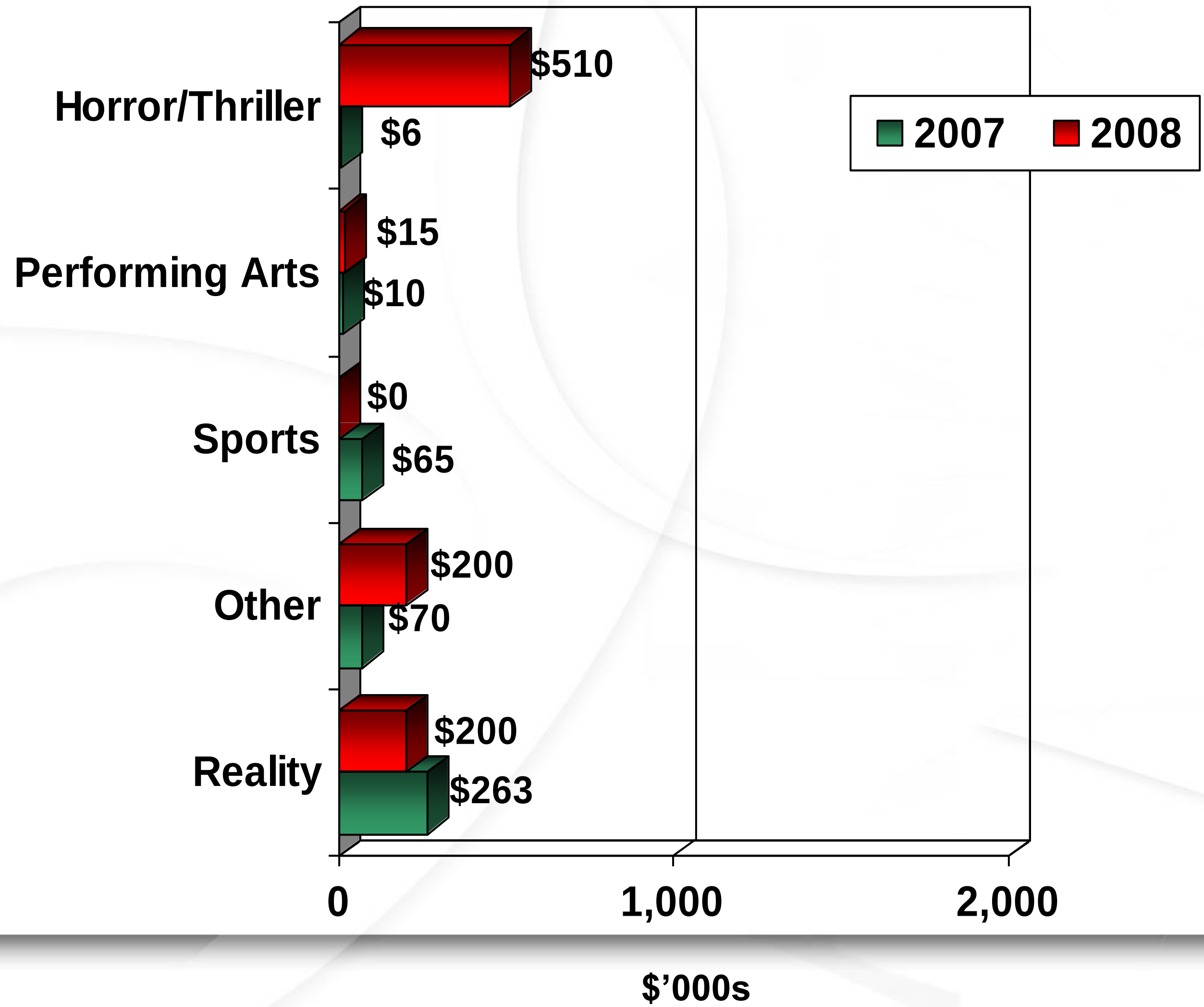
Breakdown of Likely Sales by Genre (cont'd): Tracking from 2007



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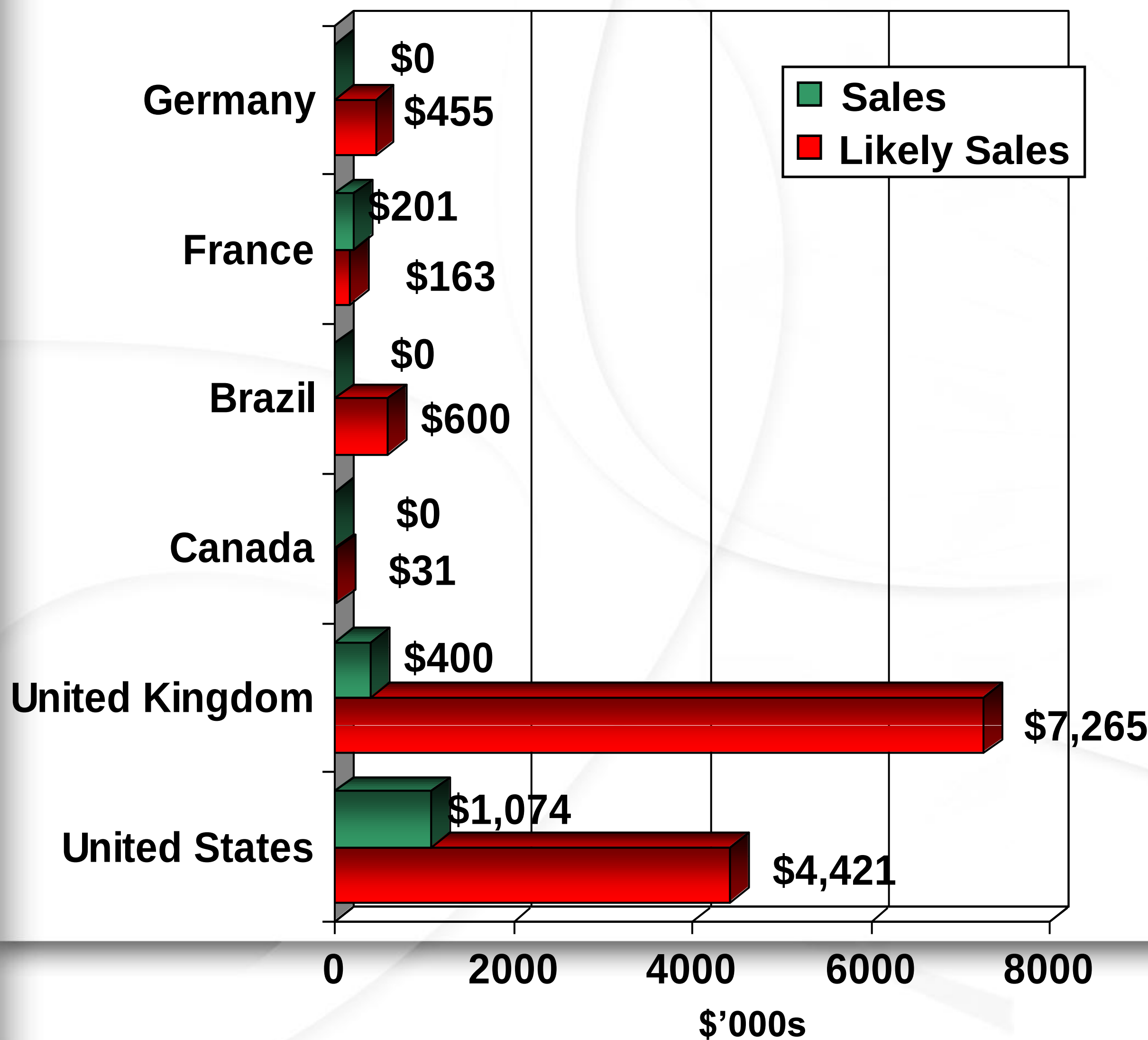
Breakdown of Sales by Genre (cont'd): Tracking from 2007

	Companies		Titles		Deals	
	2007	2008	2007	2008	2007	2008
Horror/Thriller	**1**	**1**	**2**	**2**	**2**	**5**
Performing Arts	**1**	**3**	**1**	**4**	**1**	**4**
Sports	**2**	**1**	**6**	**1**	**7**	**1**
Other	**1**	**1**	**1**	**1**	**2**	**1**
Reality	**1**	**1**	**2**	**1**	**4**	**2**

Breakdown of Sales & Likely Sales by Country



Companies	Titles	Deals
3	4	4
7	7	9
1	1	1
2	2	2
8	9	9
10	16	17

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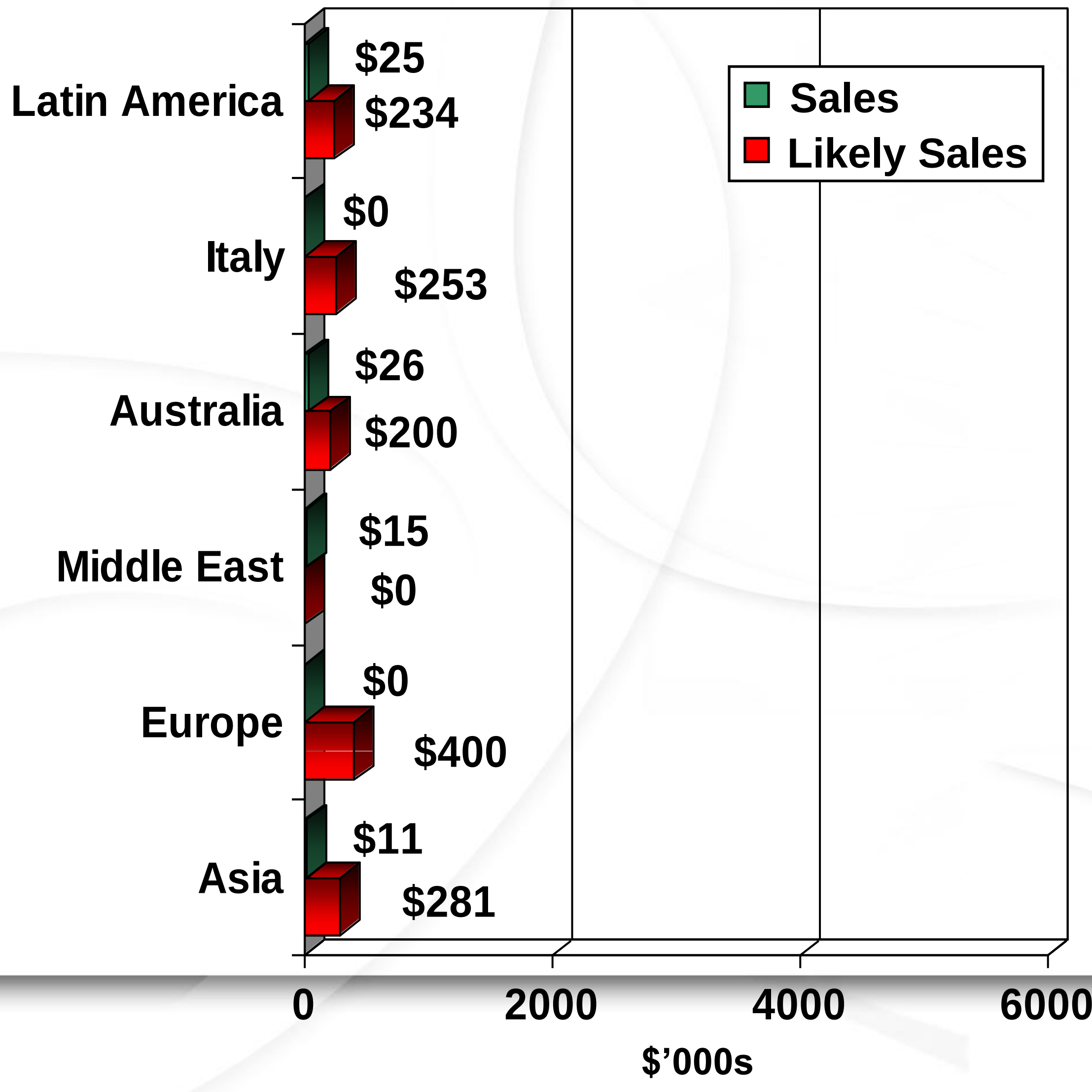
Breakdown of Sales & Likely Sales by Country (cont'd)



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

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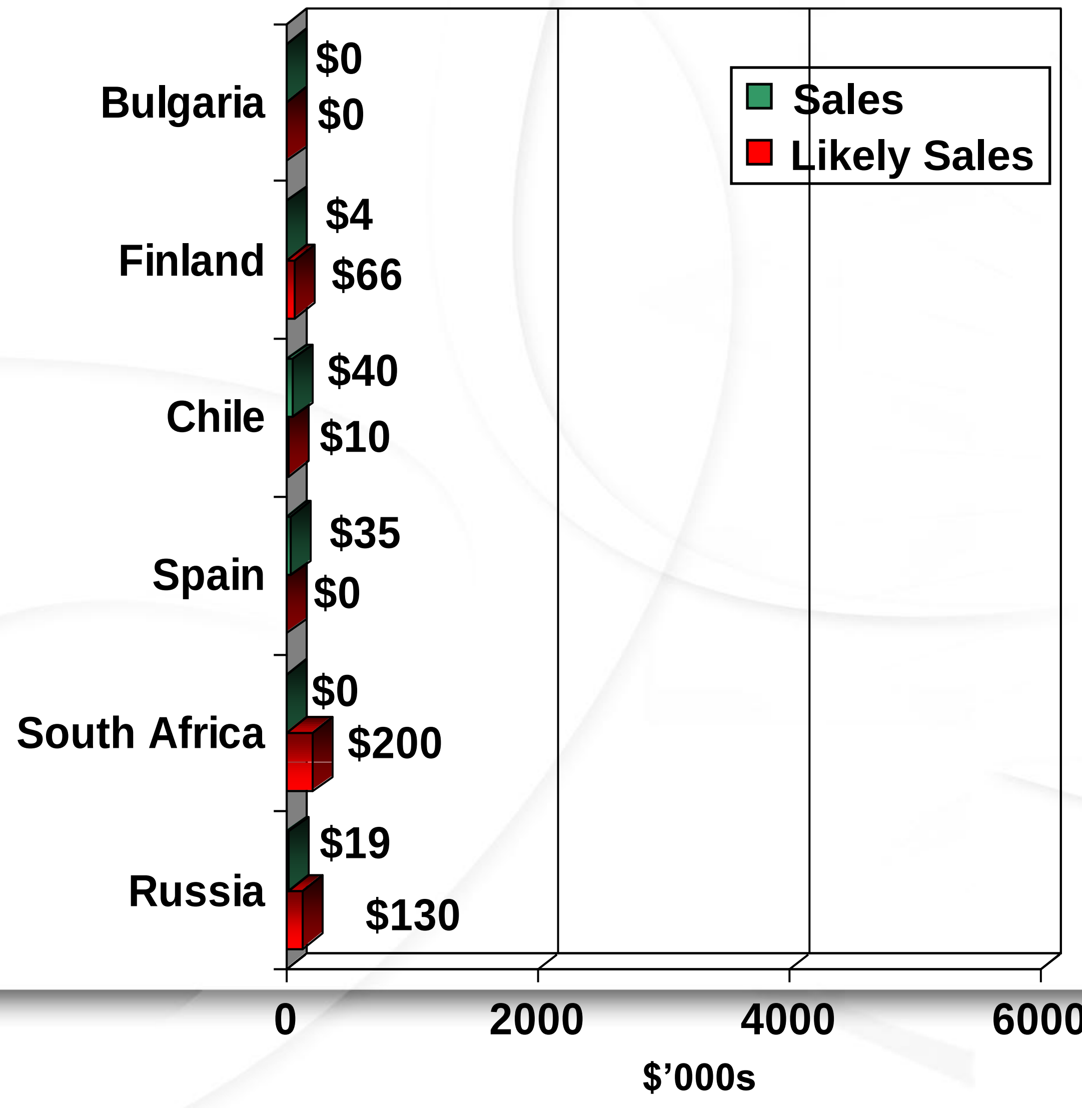
Breakdown of Sales & Likely Sales by Country (cont'd)



Companies	Titles	Deals
1	1	1
2	6	6
1	2	2
2	2	2
1	1	1
3	7	7

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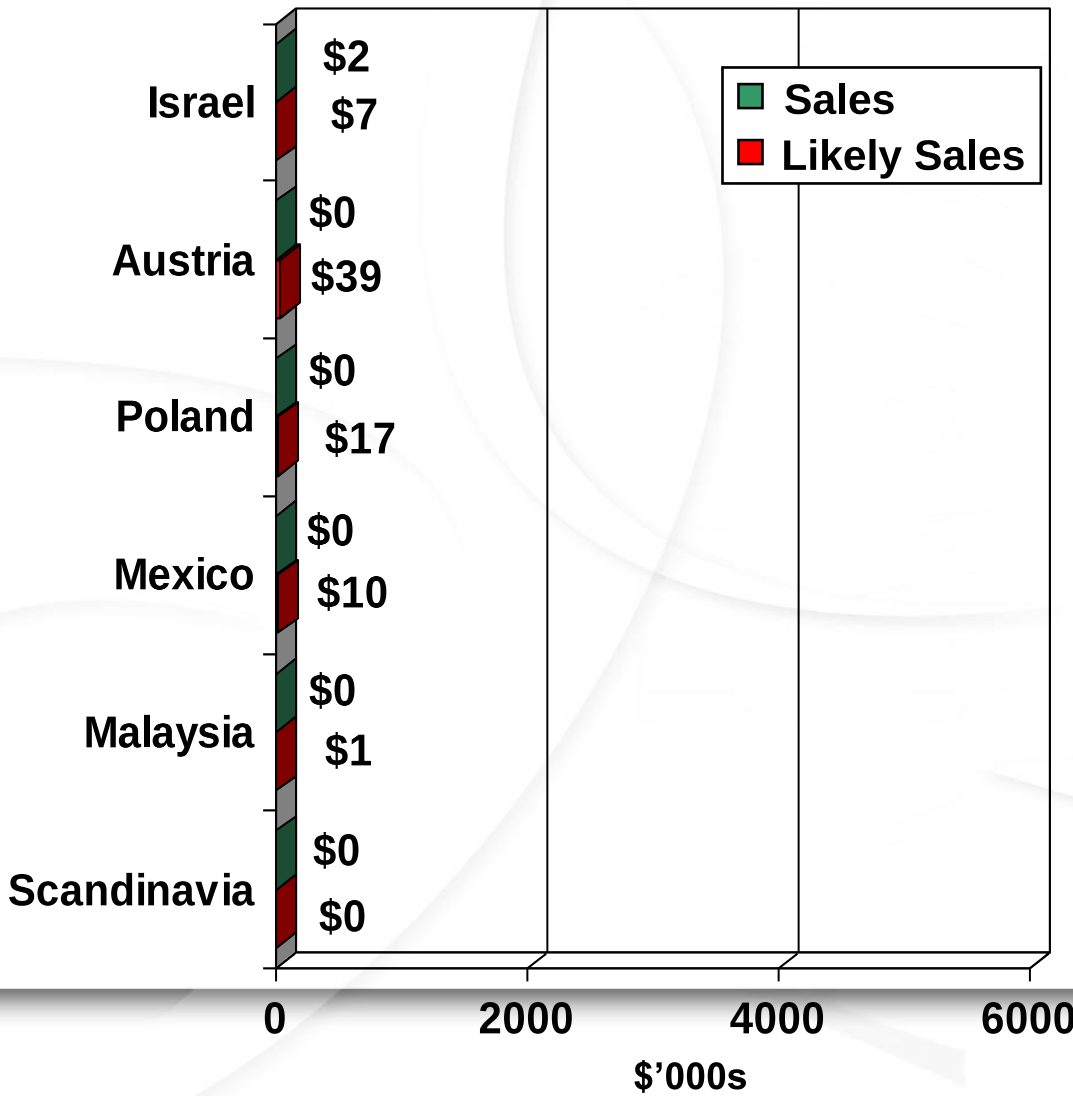
Breakdown of Sales & Likely Sales by Country (cont'd)



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

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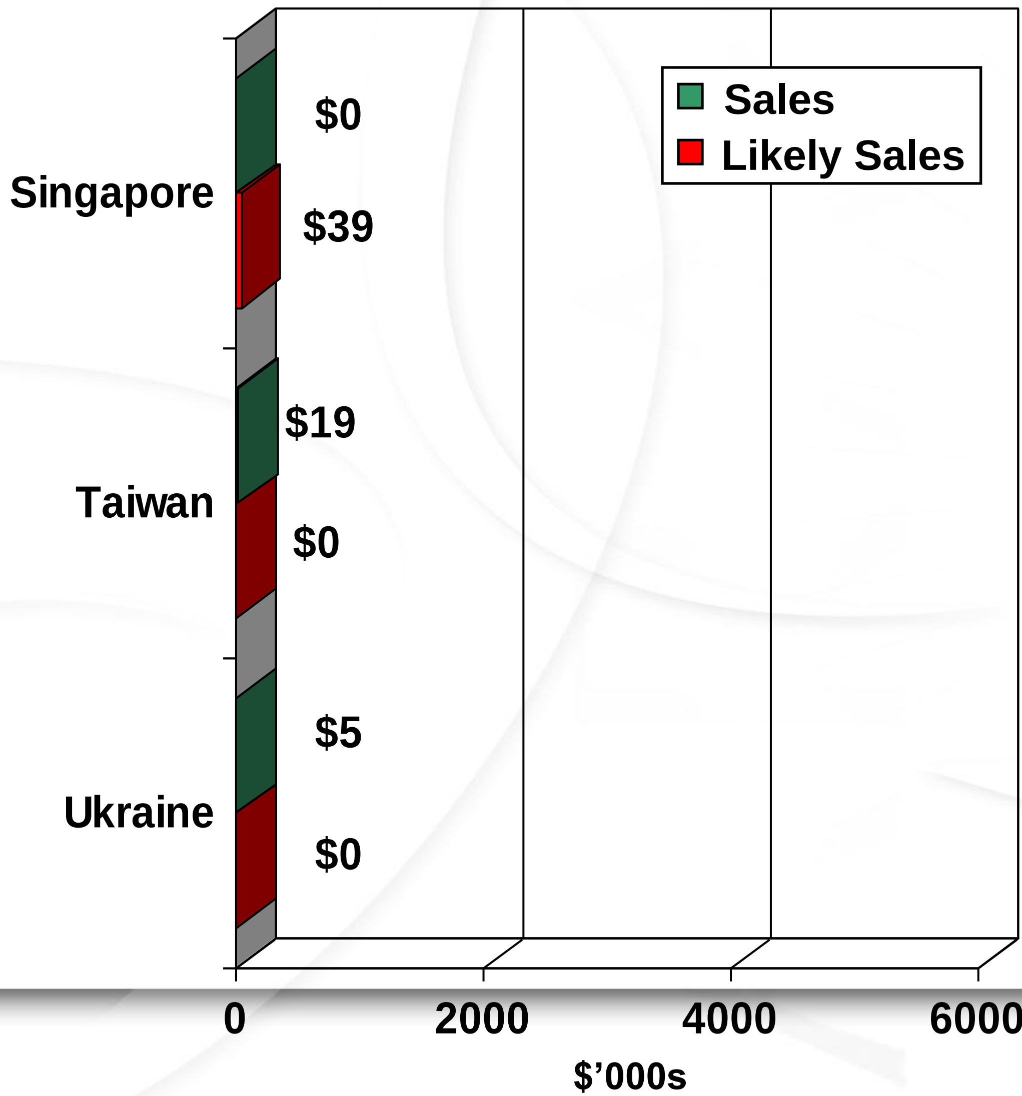
Breakdown of Sales & Likely Sales by Country (cont'd)



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

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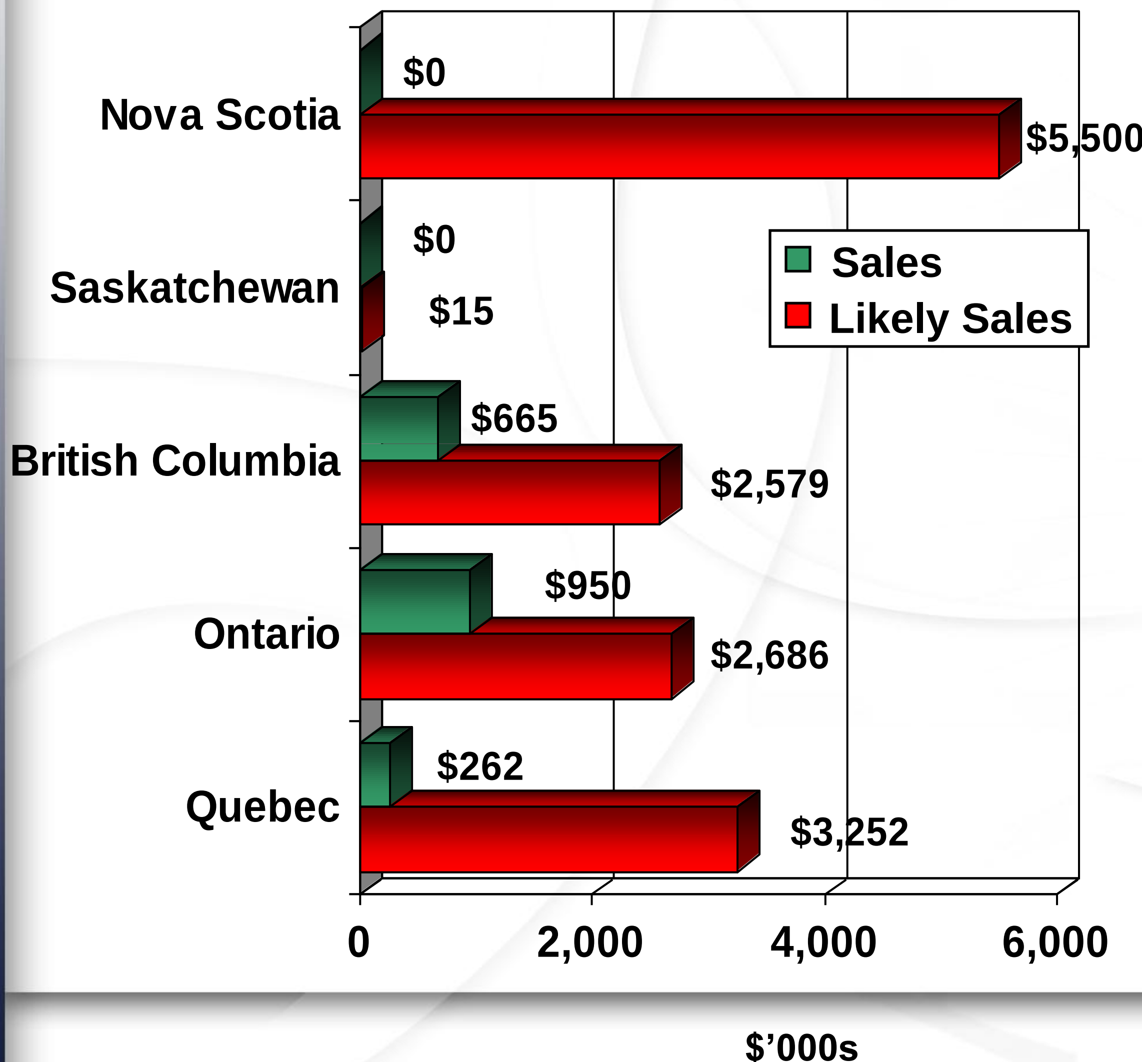
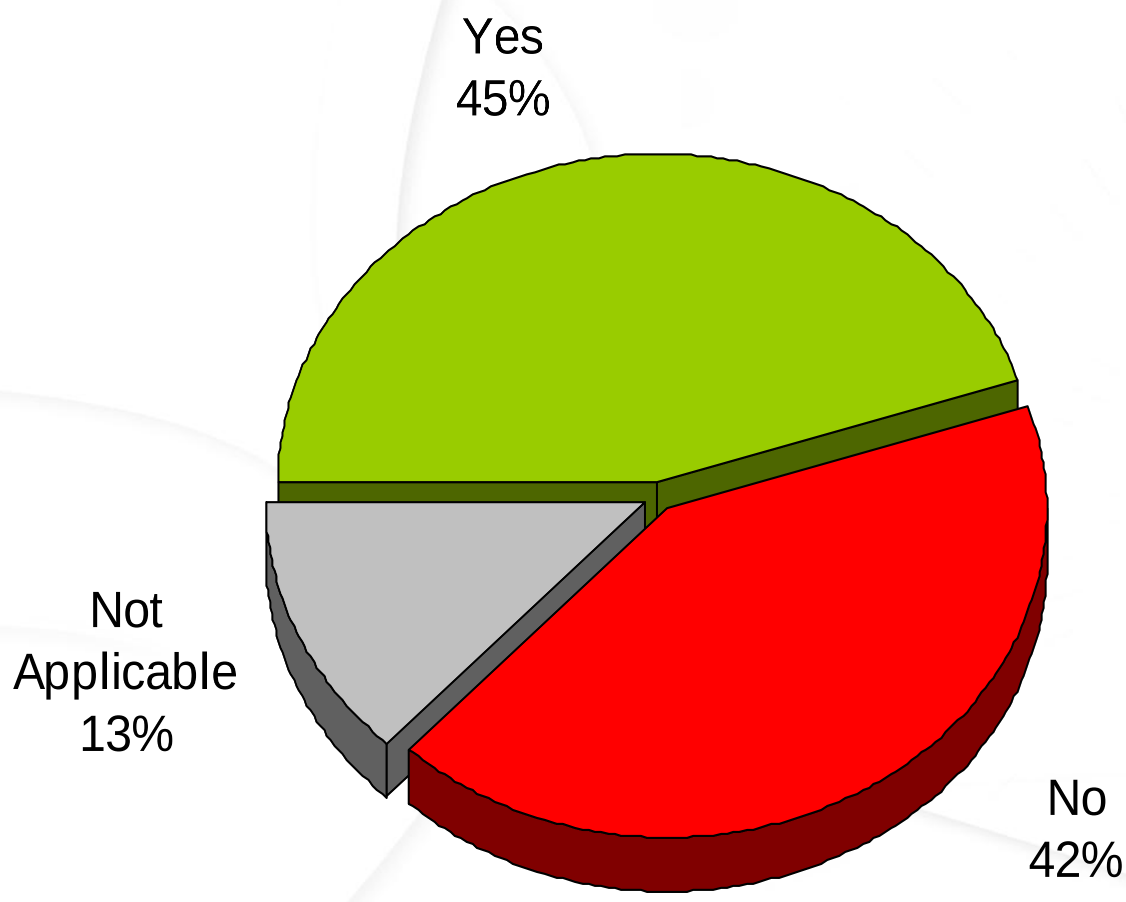
Breakdown of Sales and Likely Sales by Company Region



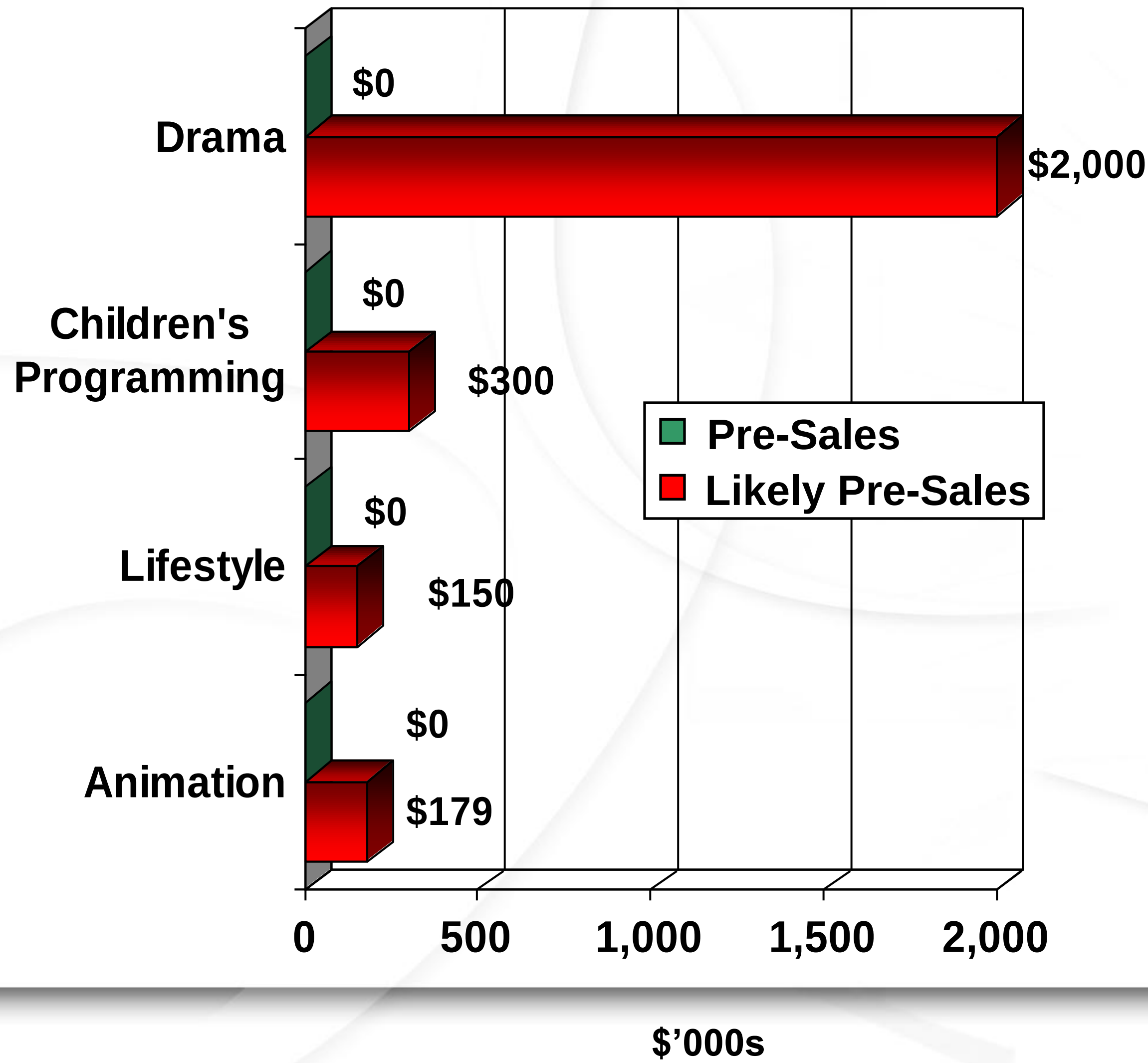
Companies	Titles	Deals
1	1	1
1	1	1
7	7	32
11	11	42
7	7	18

Pre-Sales



Q8e. Did you complete any pre-sales or begin discussions that will likely lead to pre-sales while at MIPCOM 2008? n=55

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



Companies	Titles	Deals
2	2	2
1	1	1
1	1	1
3	3	7

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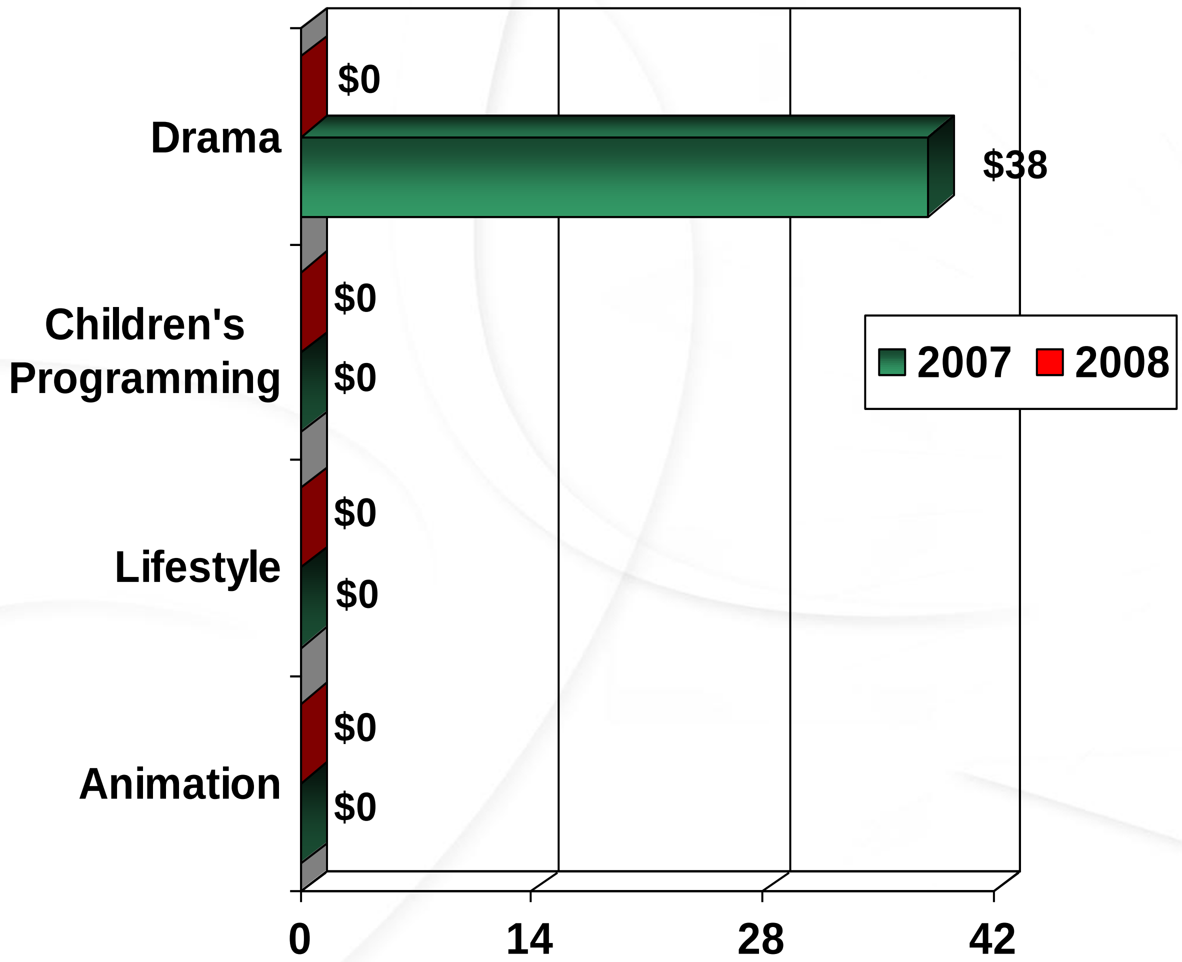
Breakdown of Pre-Sales by Genre: Tracking from 2007



$'000s

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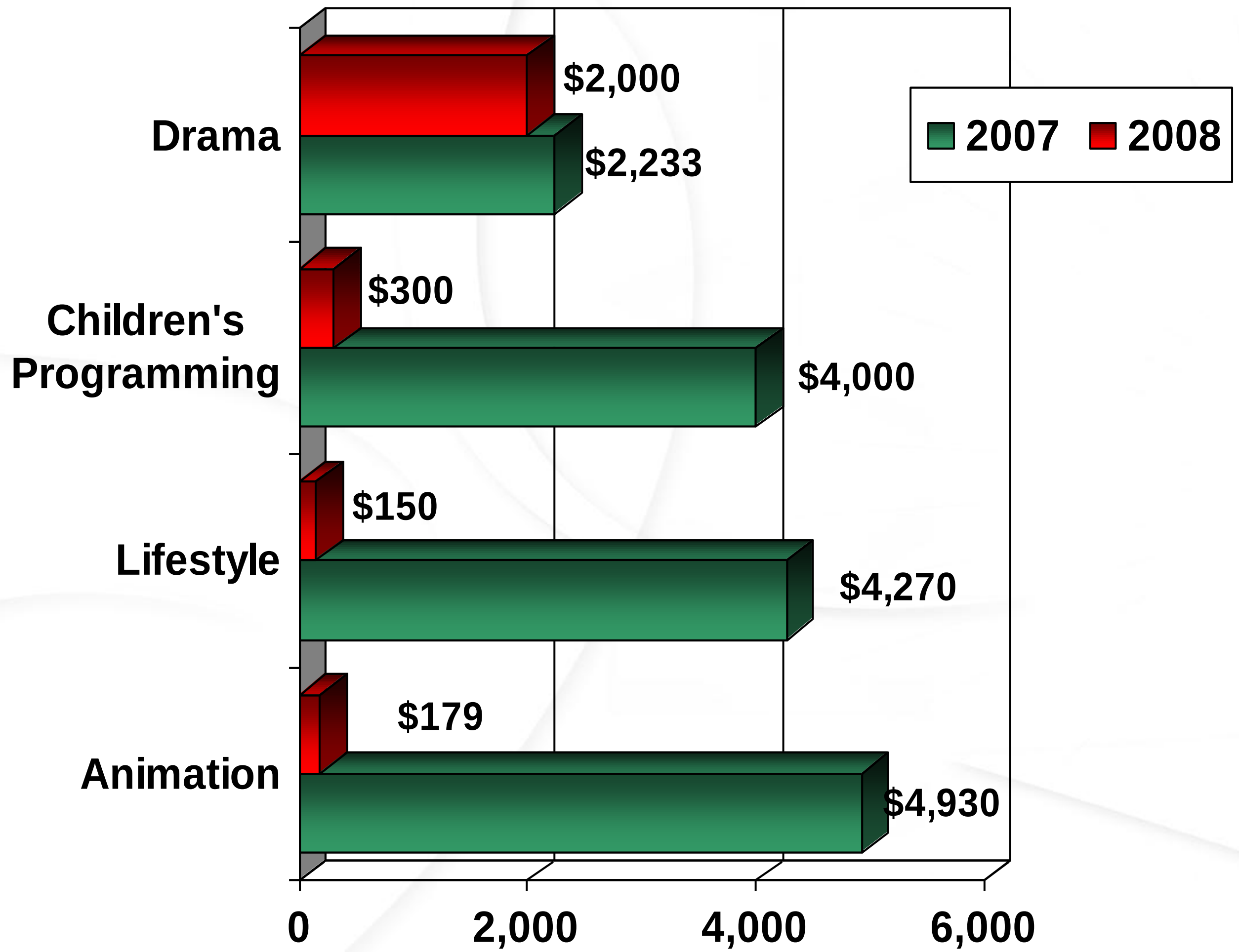
Breakdown of Likely Pre-Sales by Genre: Tracking from 2007



$'000s

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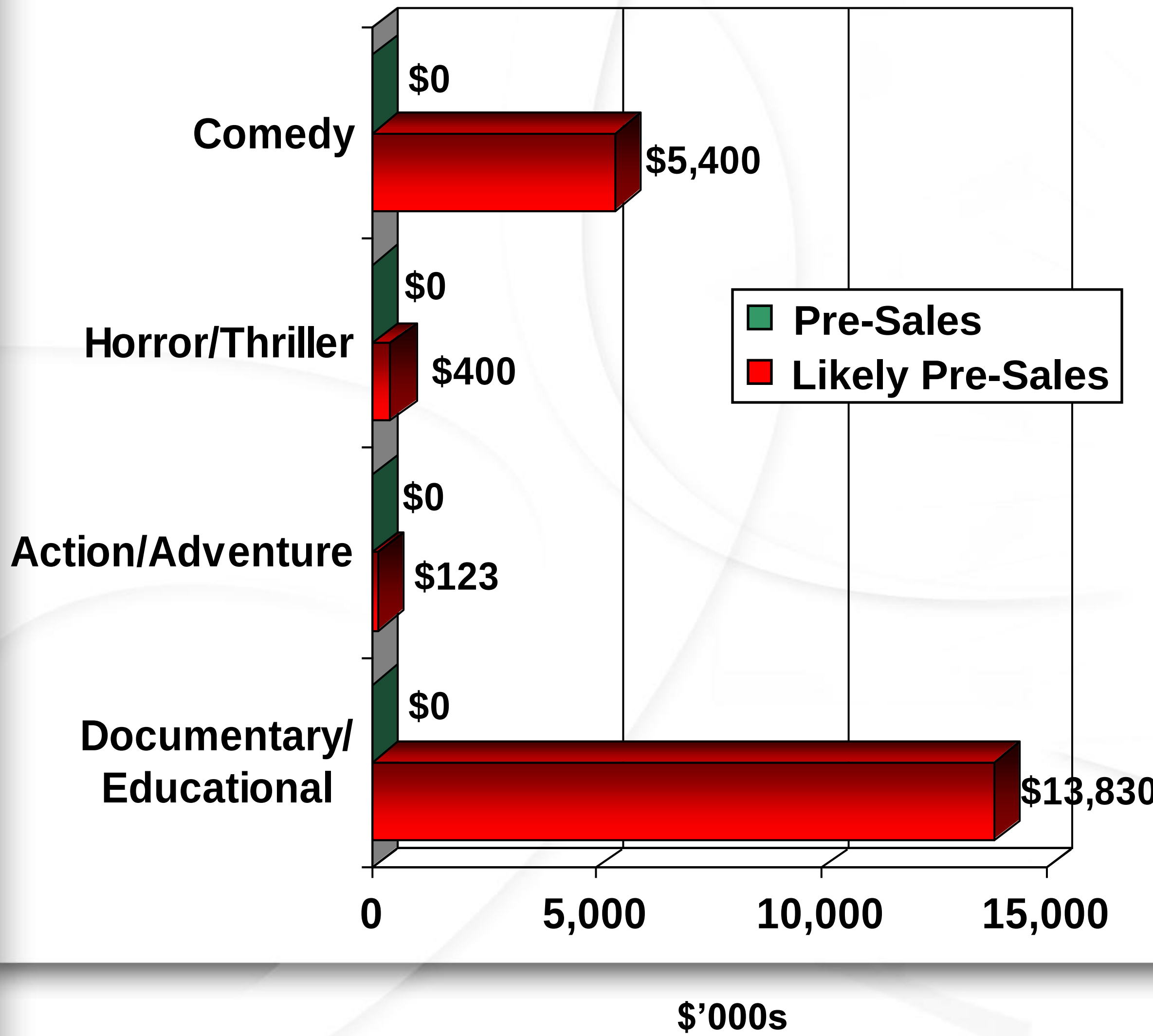
Breakdown of Presales and Likely Pre-Sales by Genre: Tracking from 2007

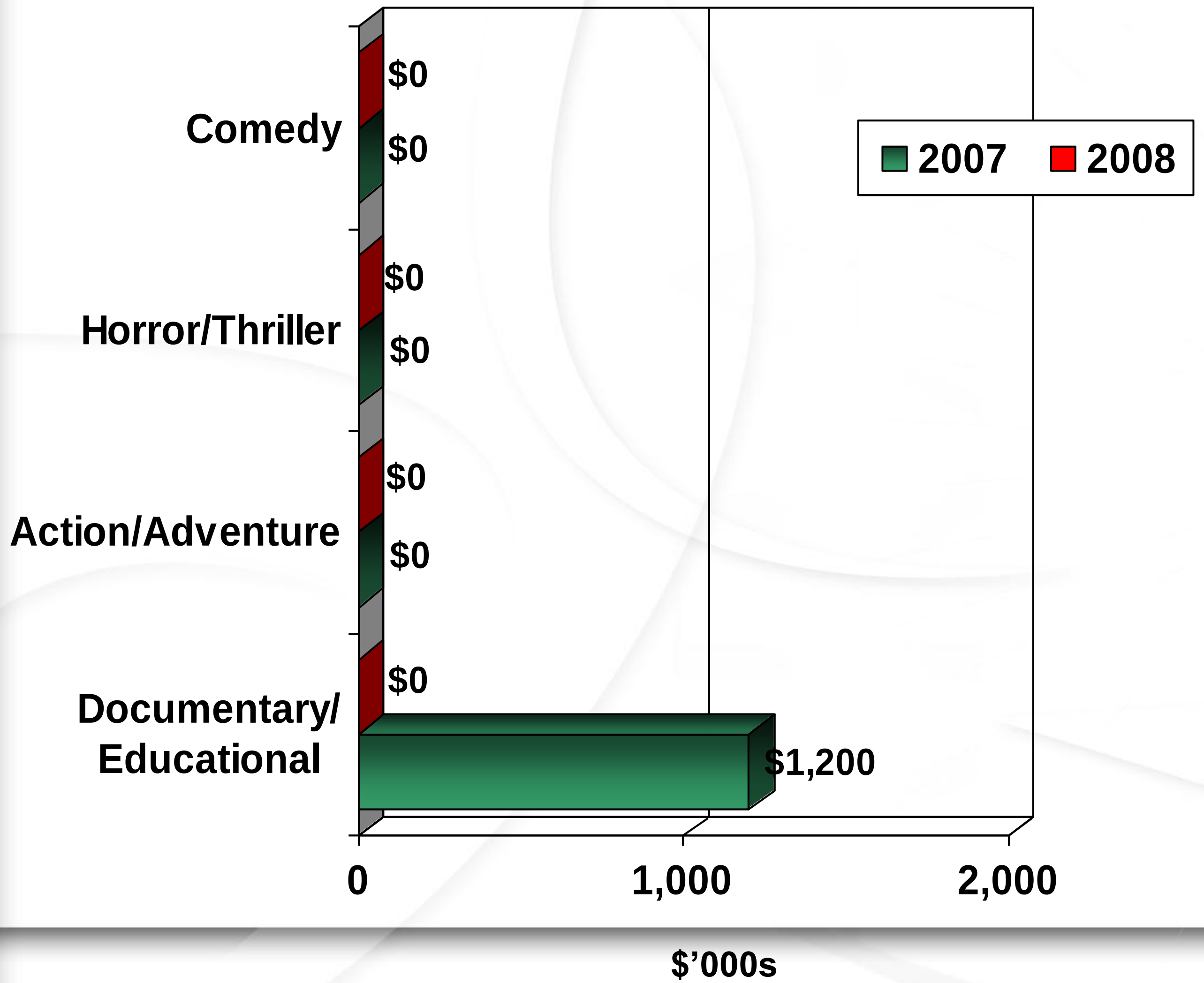
	Companies		Titles		Deals	
	2007	2008	2007	2008	2007	2008
Drama	**3**	**2**	**3**	**2**	**3**	**2**
Children's Programming	**1**	**1**	**2**	**1**	**2**	**1**
Lifestyle	**3**	**1**	**3**	**1**	**4**	**1**
Animation	**4**	**3**	**5**	**3**	**7**	**7**

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

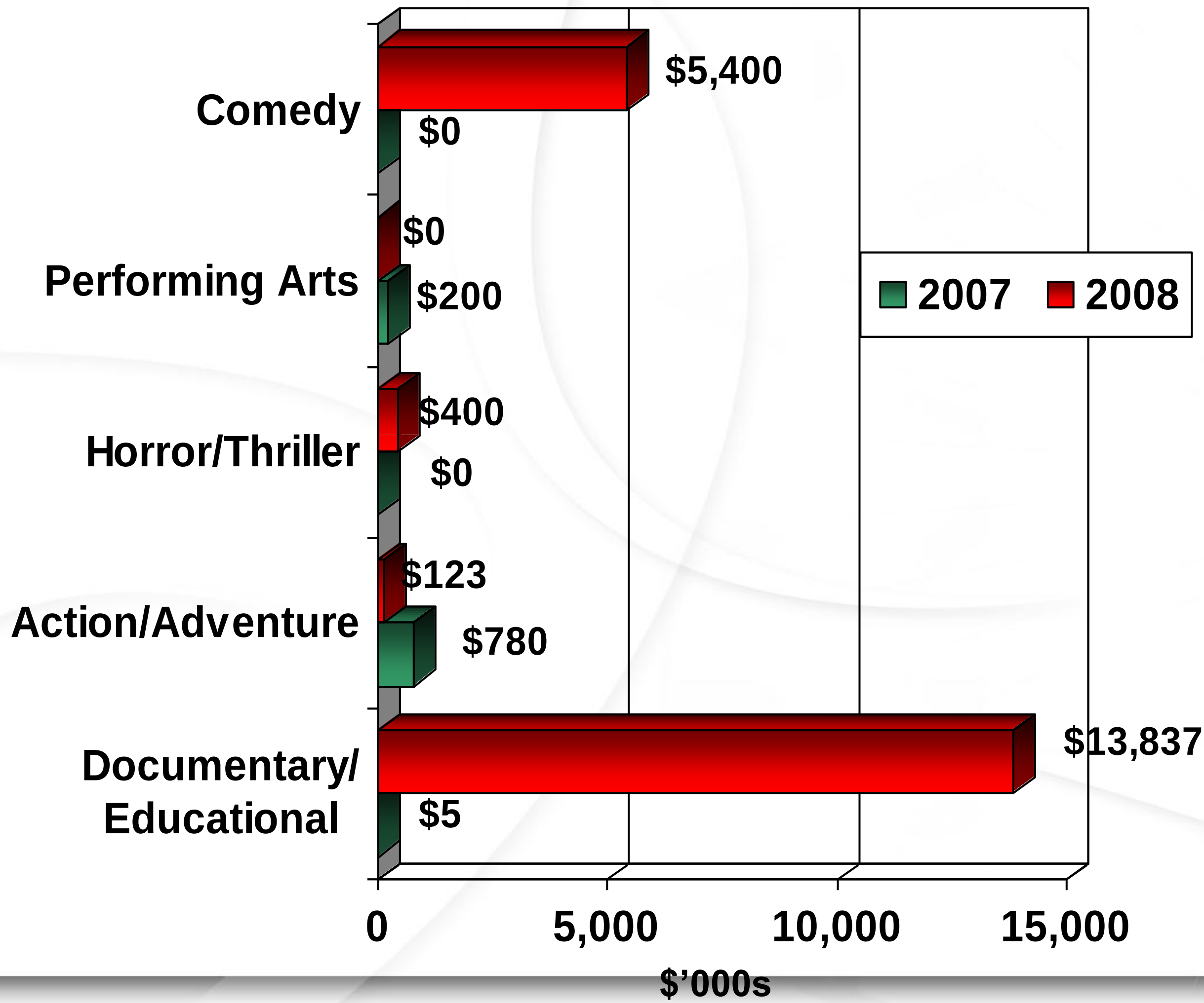


Companies	Titles	Deals
2	2	2
1	1	1
1	1	1
7	9	13

Breakdown of Pre-Sales by Genre (cont'd): Tracking from 2007



Breakdown of Likely Pre-Sales by Genre (cont'd): Tracking from 2007



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Breakdown of Presales and Likely Pre-Sales by Genre (cont'd): Tracking from 2007

	Companies		Titles		Deals	
	2007	2008	2007	2008	2007	2008
Comedy	**1**	**2**	**1**	**2**	**1**	**2**
Performing Arts	**1**	**N/A**	**1**	**N/A**	**1**	**N/A**
Horror/Thriller	**N/A**	**1**	**N/A**	**1**	**N/A**	**1**
Action/adventure	**1**	**1**	**1**	**1**	**1**	**1**
Documentary/Educational	**2**	**7**	**2**	**9**	**2**	**13**

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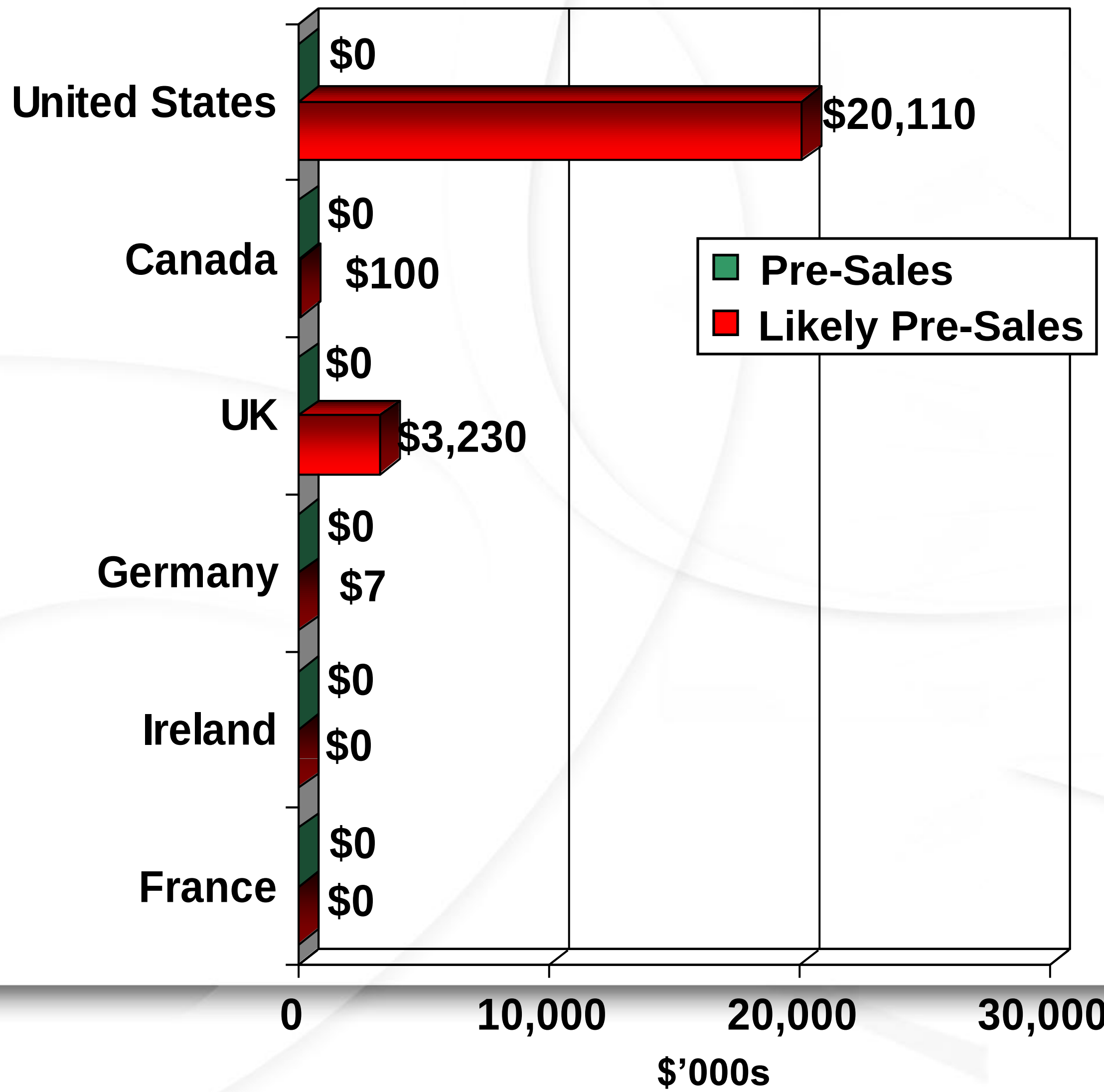
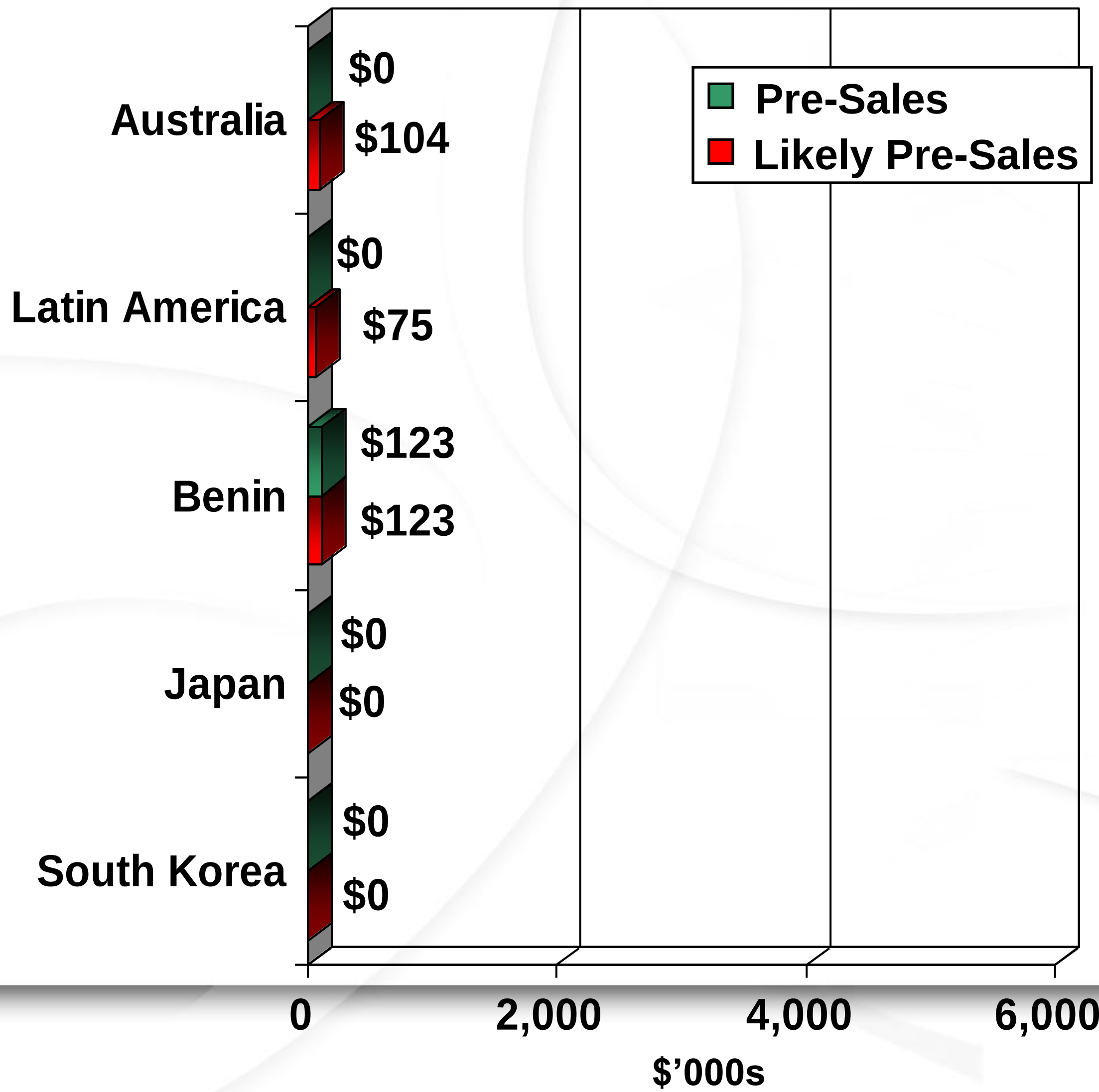
Breakdown of Pre-Sales & Likely Pre-Sales by Country



Companies	Titles	Deals
9	12	14
1	1	1
9	10	10
2	2	2
1	1	1
1	1	1

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



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

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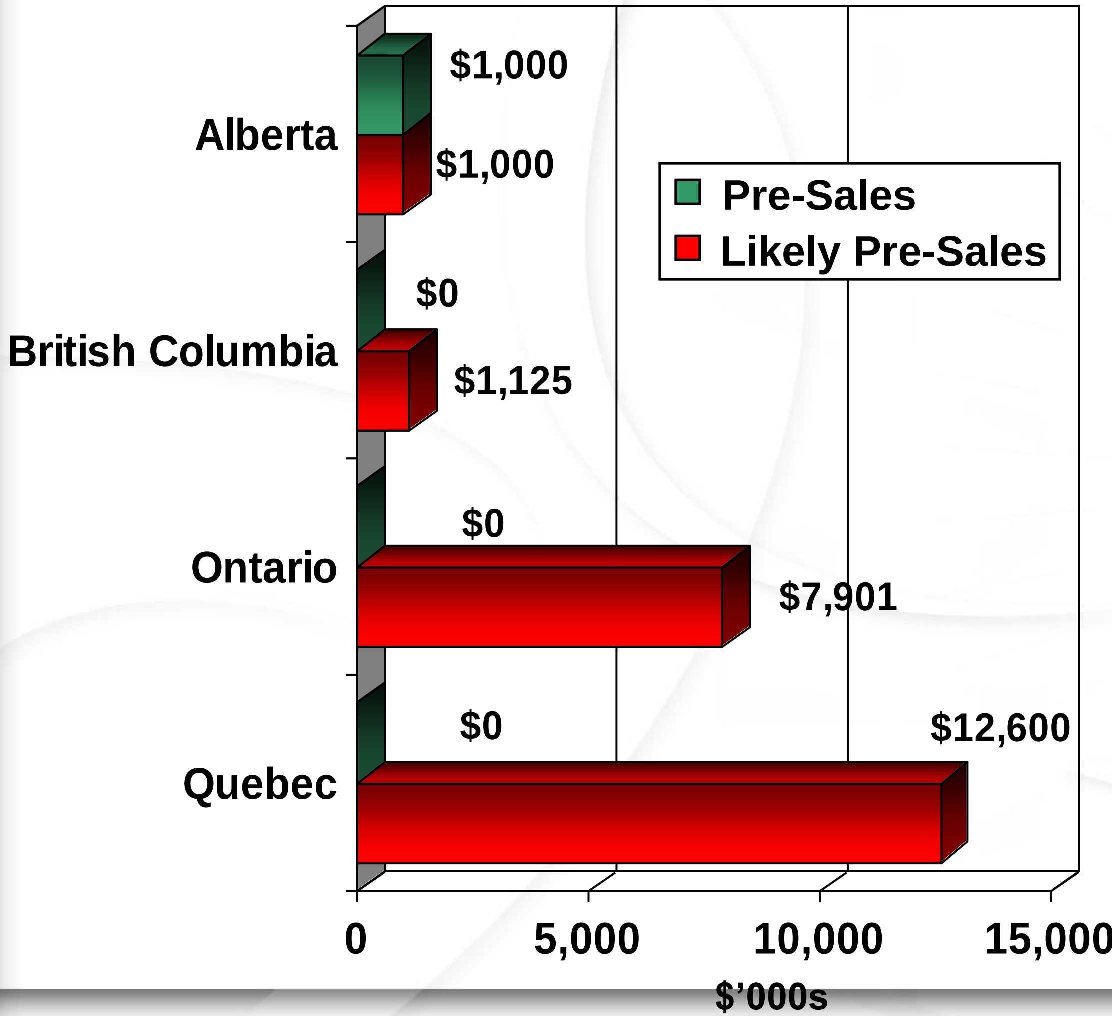
Breakdown of Pre-Sales and Likely Pre-Sales by Company Region



Companies	Titles	Deals
1	1	2
5	7	12
8	11	15
1	3	5

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Co-Production and Co-Venture Deals

- Nineteen companies (35%) indicated that they either signed, or began negotiating co-production or co-venture deals while at MIPCOM 2008. This is up from 2007, when 14 companies signed or began negotiating co-production or co-venture deals.
- Respondents indicated that 29 co-production or co-venture deals were either signed or were likely to be signed.

Co-Production and Co-Venture Deals (cont'd)

- 15 companies provided information about the value of co-production or co-venture deals
- The deals were worth $49,900,000. This is up $16,500,000 from 2007, when deals worth $ 33,400,000 were reported.
- Nearly all companies (17 out of 19) provided information about the countries with which deals were made.
- Respondents reported that they participated in an average of 40 business meetings each while at MIPCOM 2008, up from 36 in 2007.

Co-Production and Co-Venture Deals

Respon-dent	Number of co-production or co-venture deals	Estimated value of deals to company	Countries involved
1	**2**	**$12,000,000**	**Australia, UK**
2	**2**	**$10,000,000**	**Germany**
3	**2**	**$5,000,000**	**Australia**
4	**2**	**$5,000,000**	**France**
5	**1**	**$2,600,000**	**Ireland**
6	**1**	**$2,000,000**	**Germany, UK**
7	**1**	**$1,800,000**	**Australia**

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 MIPCOM 2008?

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

Co-Production and Co-Venture Deals (cont'd)

Respon-dent	Number of co-production or co-venture deals	Estimated value of deals to company	Countries involved
8	**2**	**$1,000,000**	**UK**
9	**3**	**$1,000,000**	**France**
10	**2**	**$500,000**	**France**
11	**3**	**$500,000**	**N/A**
12	**2**	**$200,000**	**Australia**
13	**1**	**$100,000**	**Germany, UK, US**
14	**1**	**$100,000**	**France**
15	**1**	**$100,000**	**Australia**

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 MIPCOM 2008?

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

Co-Production and Co-Venture Deals by Company Region

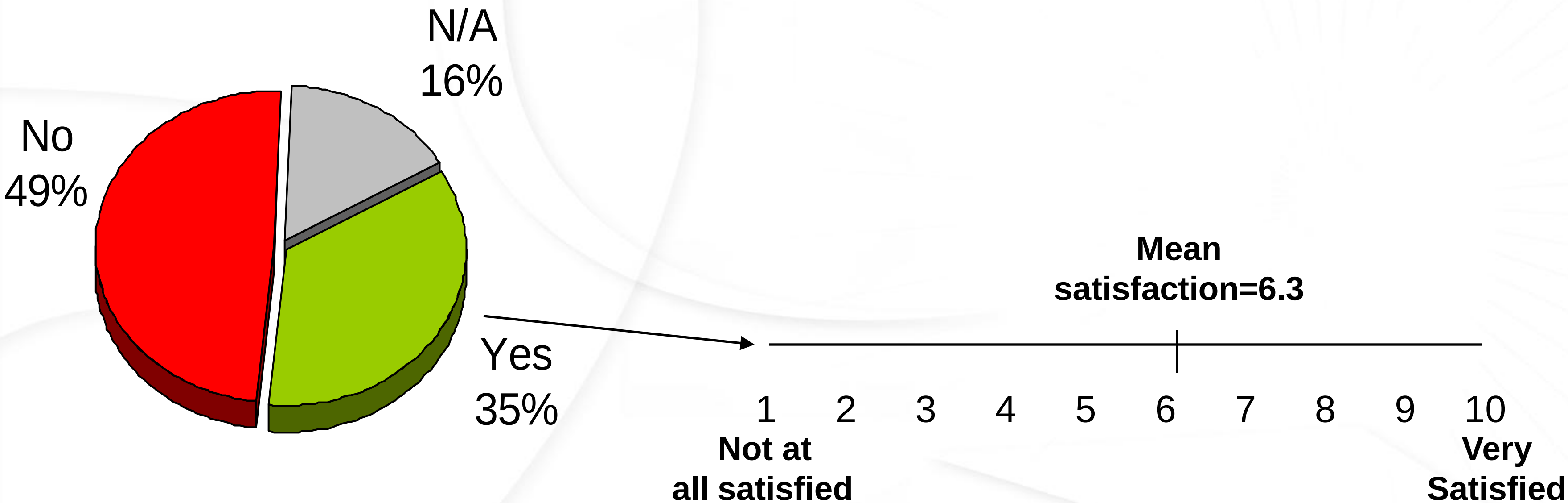
Region	Number of companies	Number of co-production or co-venture deals	Estimated Value of deals to company
Ontario	**9**	**11**	**$26,800,000**
Quebec	**4**	**9**	**$11,000,000**
British Columbia	**5**	**6**	**$3,100,000**
Nova Scotia	**1**	**1**	**$1,000,000**

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 MIPCOM 2008?

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

Title Screening

- **19 companies (35%) indicated that they had a title screened at MIPCOM 2008.**
- **These respondents gave an average satisfaction score of 6.3 for the visibility their titles received from the screenings, down from 7.4 in 2007.**



Q11. Were any of your titles screened at MIPCOM 2008? (n=55)

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=19)

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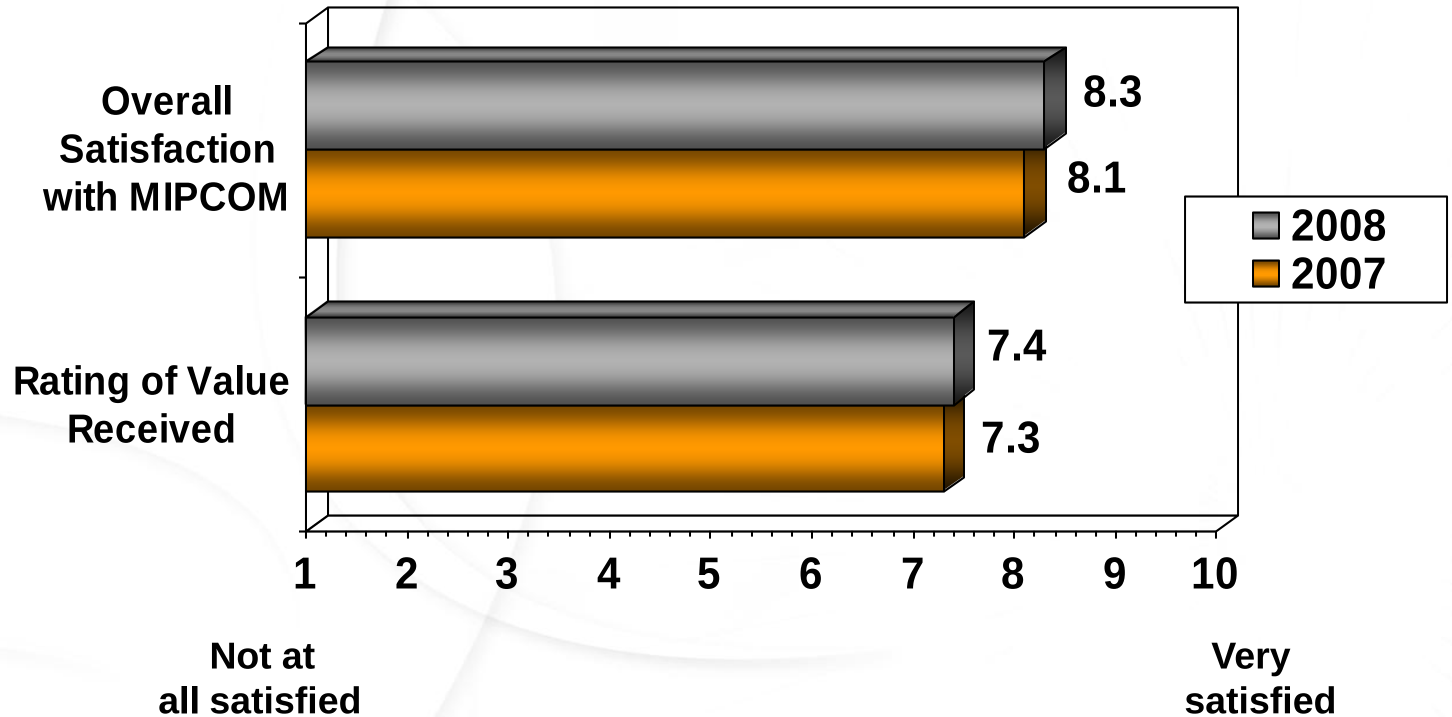
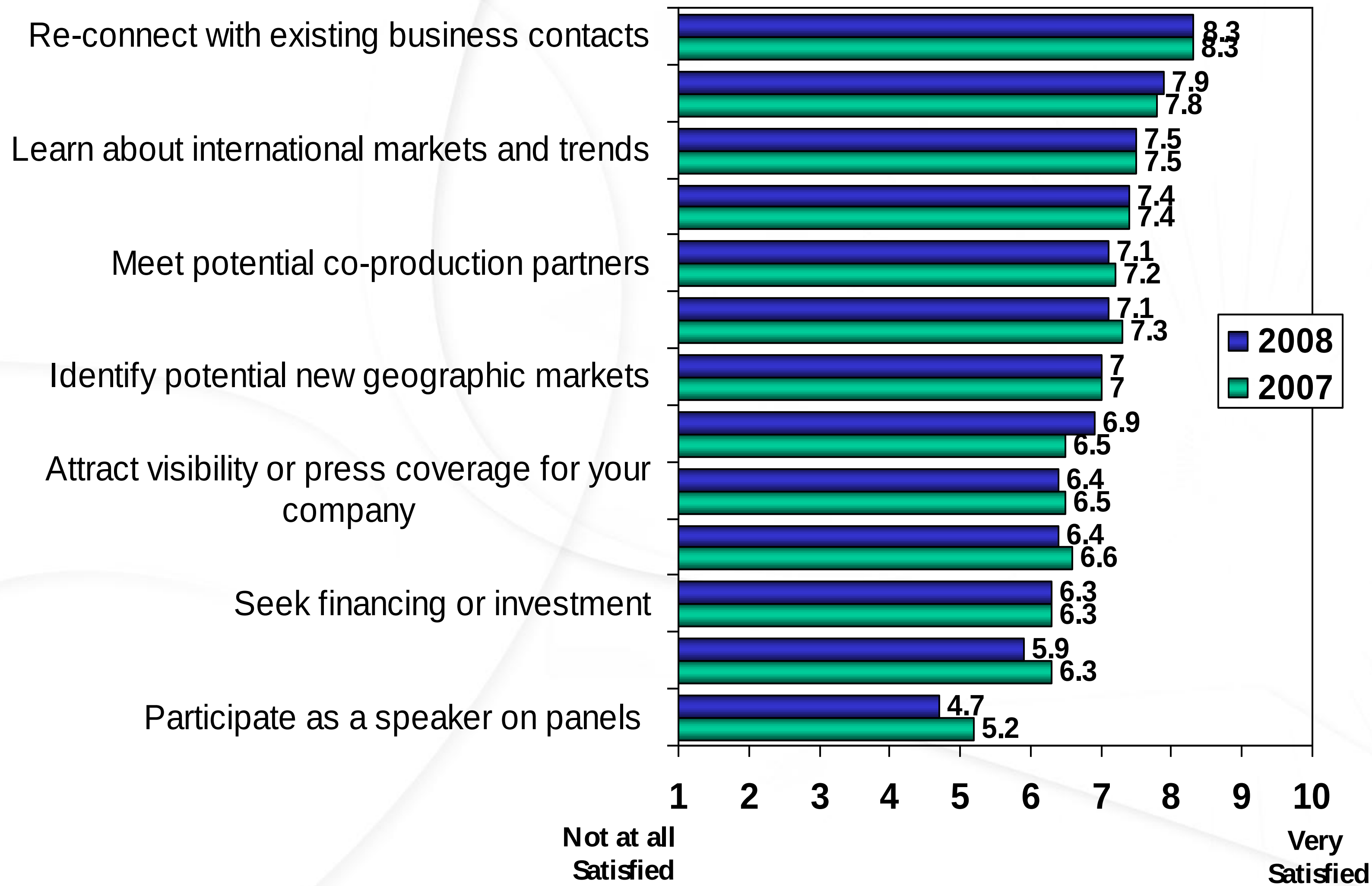
Overall Satisfaction With, and Value of, MIPCOM 2008, Compared with MIPCOM 2007



Q13a. How satisfied would you say you were overall with MIPCOM 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 MIPCOM 2008, how would you rate the VALUE you received on the same 1-10 scale...? n=55

Satisfaction with MIPCOM 2008, Compared with MIPCOM 2007



Q13. **How satisfied were you with MIPCOM 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=55**

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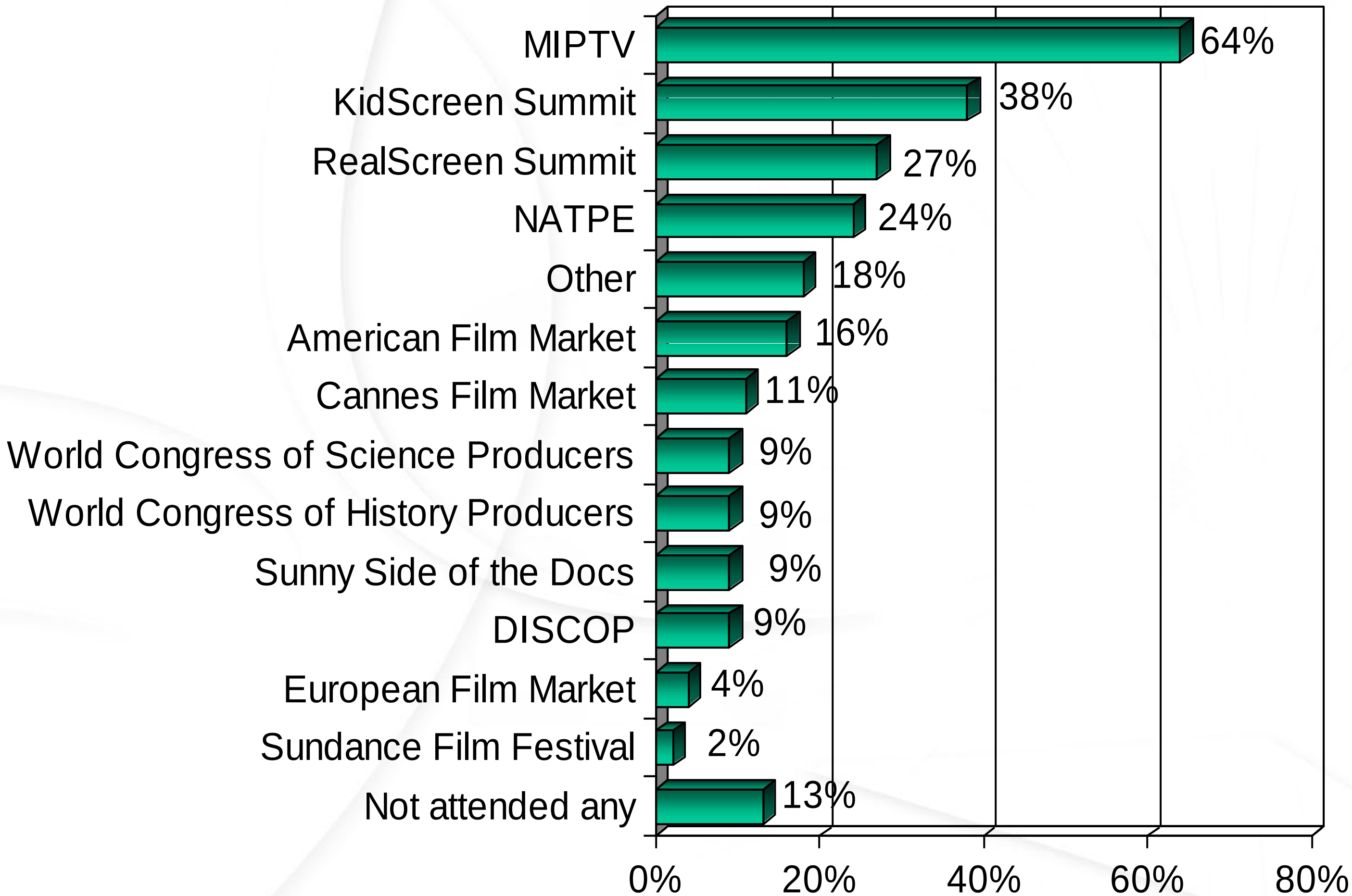
International Markets & Festivals Attended



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=55

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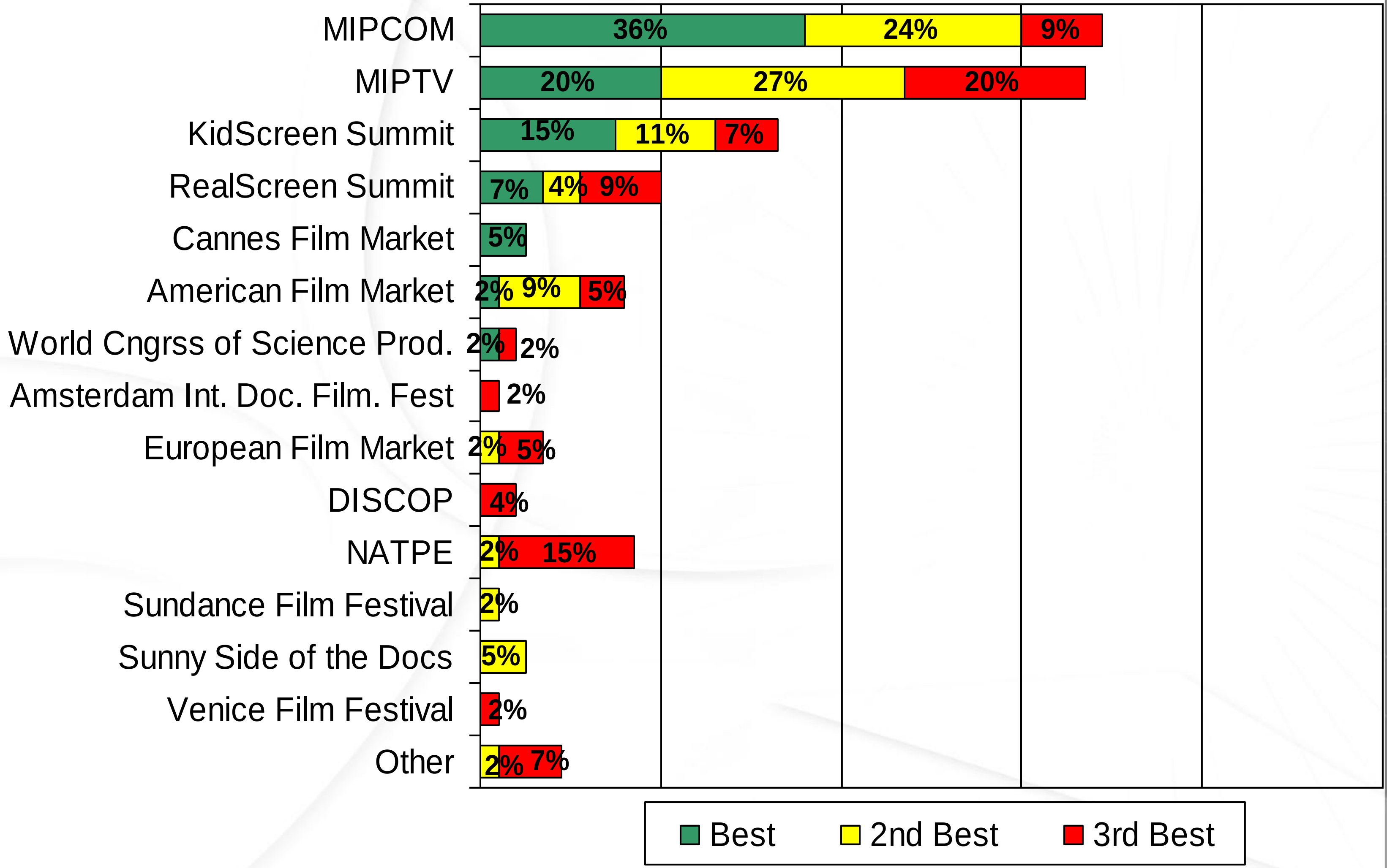
Rating of International Festivals & Markets



Q15 Thinking of MIPCOM 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=55

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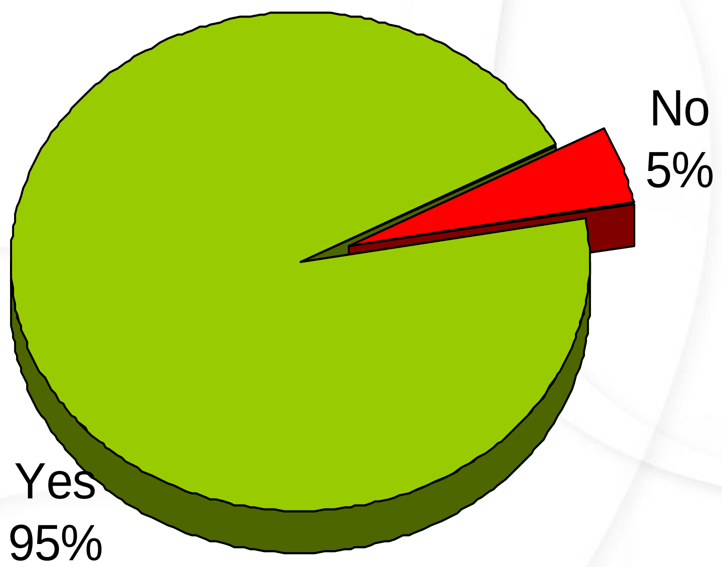
Used Services of Canada Pavilion?

Used Canada Pavilion?



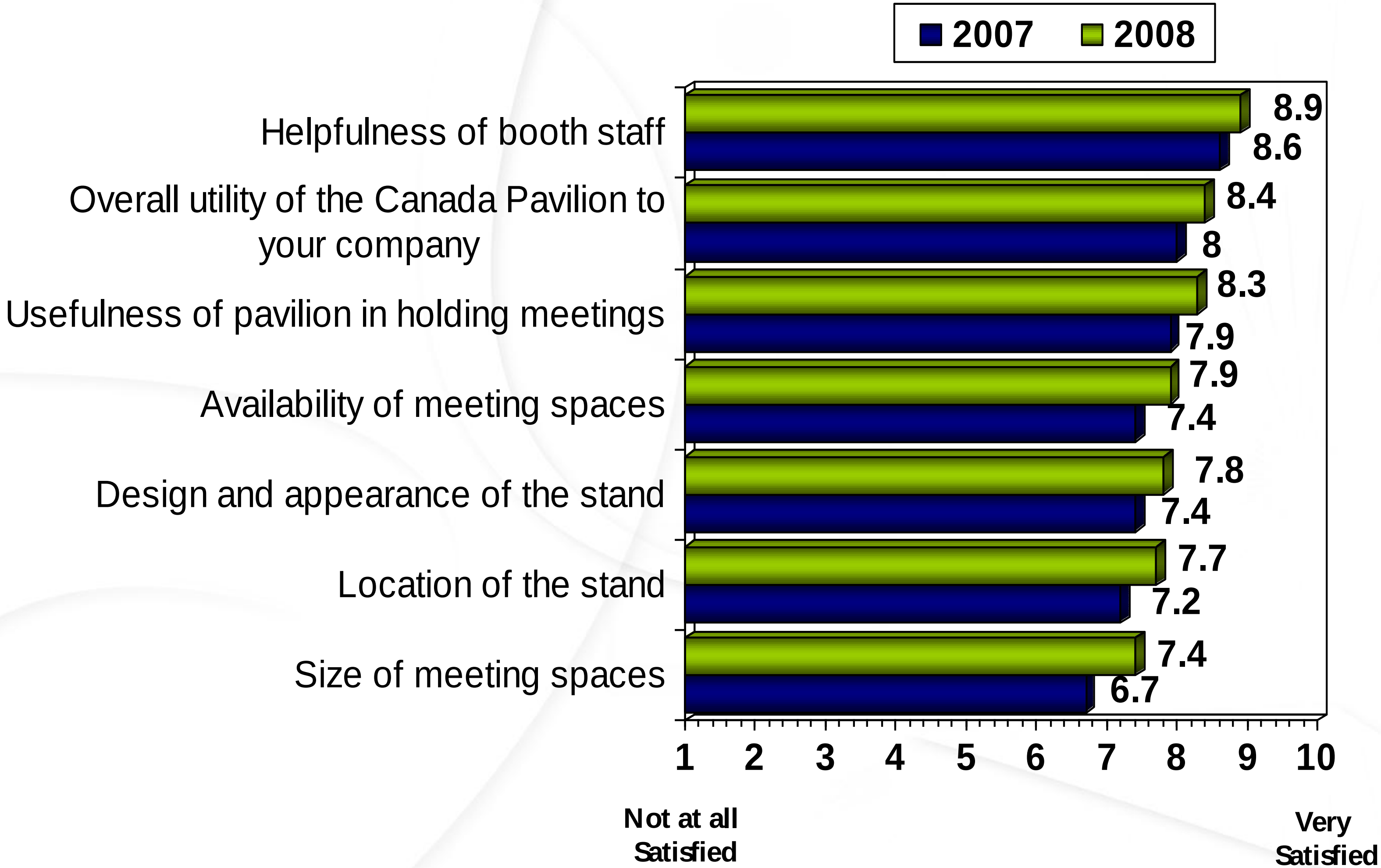
Why Not?

- *Meetings took place elsewhere*
- *Used DVD*
- *I was engaged as a consultant by ITV Global Enterprises just before MIPCOM and spent virtually all my time at MIPCOM with them.*

Q17 Did you use the services provided by the Canada Pavilion at MIPCOM 2008? n=55

Q18 (IF "NO" TO Q17) Why didn't you use the services provided at the Canada Pavilion? n=3

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 MIPCOM 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

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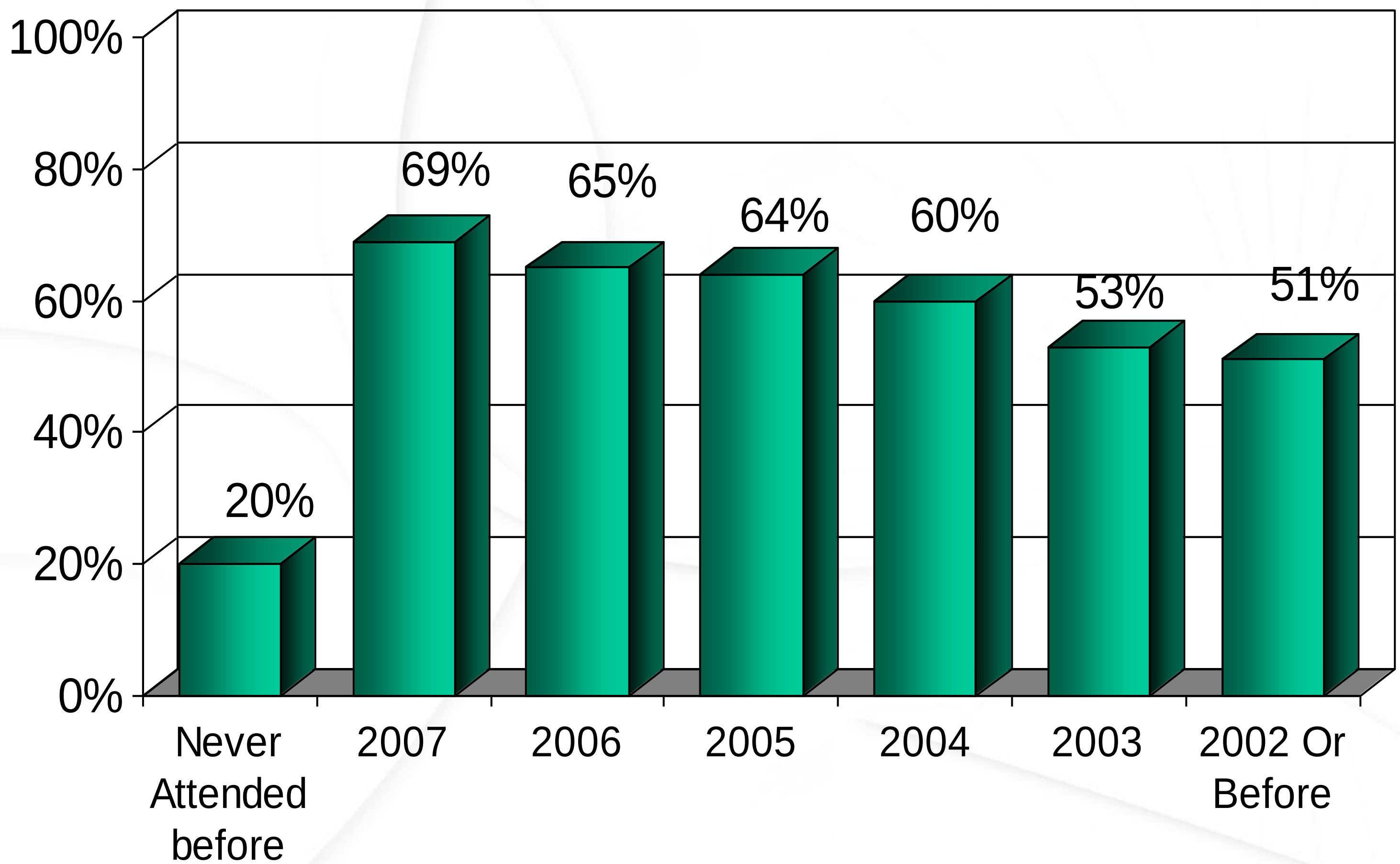
Past Attendance at MIPCOM



Q21. Which previous MIPCOM events, if any, has your company attended?
Select all that apply n=55

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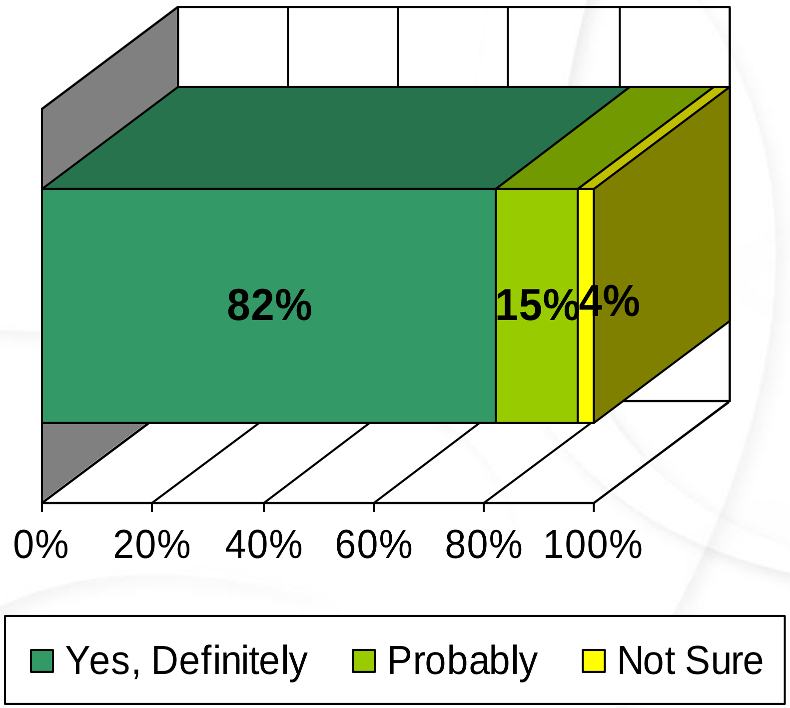
Likelihood of, and Reasons for, Recommending MIPCOM to Others*



- *"It is the most crucial international market for the TV industry."*
- *"It is the key event to feel trends, make new business contacts."*
- *"MIPCOM is an extremely important market for international and particularly European television and all rights sales for feature films, documentaries, short films and television series."*
- *"Invaluable market and networking opportunity."*
- *"It's the biggest TV event so for those looking for a truly int'l scope, it's the one to attend."*

Q22a. Would you recommend MIPCOM to other companies in the Canadian audio-visual industry? n=55

Q22b. Please explain your answer. n=38

This is just a sample of verbatim comments. A complete list of verbatim comments can be found in a separate document.

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Cost of Attending MIPCOM 2008

- Companies incurred an average cost of $13,270 (median amount $10,000) in attending MIPCOM 2008.
- 35% of respondents (19 companies) indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend the event.
- Four companies reported receiving federal funding ranging in amount from $1,000 to $9,000. The mean amount was $4,250.
- Fourteen companies indicated that they had received provincial funding ranging in amount from $2,000 to $10,000. The mean amount was $4,866.

Conclusions

Conclusions

- Similar to 2007 (97%), television continues to be the most popular format of interest (91%) in 2008 for companies attending MIPCOM. Interest in feature film is higher among companies in 2008 (35%) compared to last year (25%) and higher once again for new media (36%) in 2007 compared to 2007 (29%) and 2006 (22%).
- Children's programming (55%) and Documentary/Educational (55%) were the most popular programming genres that companies were interested in selling and/or pre-selling. For television, Children's Programming was the most popular genre (53%) as well as for new media (18%). For Feature Films, Drama (15%) continued to be the most popular genre compared to slightly less interest in 2007 (9%).

Conclusions

- More than eight-in-ten (84%) respondents indicated that they either completed sales, or began discussions that are likely to lead to sales while at the event.
- Equal to last year, almost half (45%) said that they either completed pre-sales, or began discussions that are likely to lead to pre-sales.
- Almost two-fifths (35%) of the companies said that they either signed or began negotiating co-production or co-venture deals.
- **$1,875,724** of actual sales, **$14,032,818** of likely sales, **$22,359,123** of likely pre-sales, together with **$49,900,000** of co-production or co-venture deals were reported by survey participants for a total of **$88,167,665**. This is up **$19,659,745** from last years total of $68,507,920.

Conclusions

- Overall, participants were extremely satisfied with MIPCOM 2008, giving an overall satisfaction score of 8.3 out of 10. This is up slightly from last year's score of 8.1
- Respondents were marginally more satisfied with MIPCOM 2008 in terms of the value they received, giving an average rating of 7.4 (up from 7.3 since last year).
- Respondents indicated that the MIPCOM Market is the best (36%) international event held outside of Canada at meeting their needs, with MIPTV (20%) coming in second place and KidScreen Summit (15%) ranking third.
- Participants were most satisfied with the 2008 MIPCOM Market in terms of *re-connecting with existing business contacts* (8.3 out of 10), *make new business contacts* (7.9) and *learn about international markets and trends* (7.5).
- They were least satisfied with it in terms of *participate as a speaker on panels* (4.7).
- In general, participants were slightly more satisfied with MIPCOM 2008 on almost all measures, compared with MIPCOM 2007.

Conclusions

- Ninety-five percent (95%) of the survey respondents used the services provided by the Canada Pavilion at MIPCOM 2008.
- They were quite satisfied with the overall utility of the Canada Pavilion (rating their satisfaction as 8.4 out of 10).
- More specifically, they were most satisfied with the Pavilion in terms of:
  - The helpfulness of booth staff (8.9)
  - The usefulness of Pavilion in holding meetings (8.3)
  - Availability of meeting spaces (7.9)
  - The design and appearance of the stand (7.8).
- They were slightly less satisfied with the stand in terms of the physical space:
  - The location of the stand (7.7)
  - Size of meeting spaces (7.4).
- Participants were slightly more satisfied with the Canada Pavilion on most aspects, compared with last year.

Conclusions

- Attendees of MIPCOM 2008 are generally very satisfied with the market itself and with the services provided by the Canada Pavilion. As result of the success this event accomplished, Telefilm could use this market as a platform or benchmark for what all future events should aim to provide.
- Telefilm should continue to provide the Canada Pavilion at as many events as possible in order to better cater to clients' needs in terms of meeting international partners.
- Telefilm should continue to make efforts to control costs so that it remains accessible to the smaller, independent companies.

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