

MIPTV 2008
Outcomes Report

Conducted by:

POLLARA 

For:
Telefilm Canada

June 2008

Methodology

Methodology

- A total of 65 e-mail invitations were sent to Canadian companies that attended MIPTV 2008.
- 51 of the 65 companies clicked on the link in the e-mail invitations to go to the survey site.
- Of these 51, 47 completed all of the survey - a 92% open link and complete response rate.
- The overall response rate was 72%.
- The survey was open from May 7th until June 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 65 companies



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



47 companies reached the
end of the survey

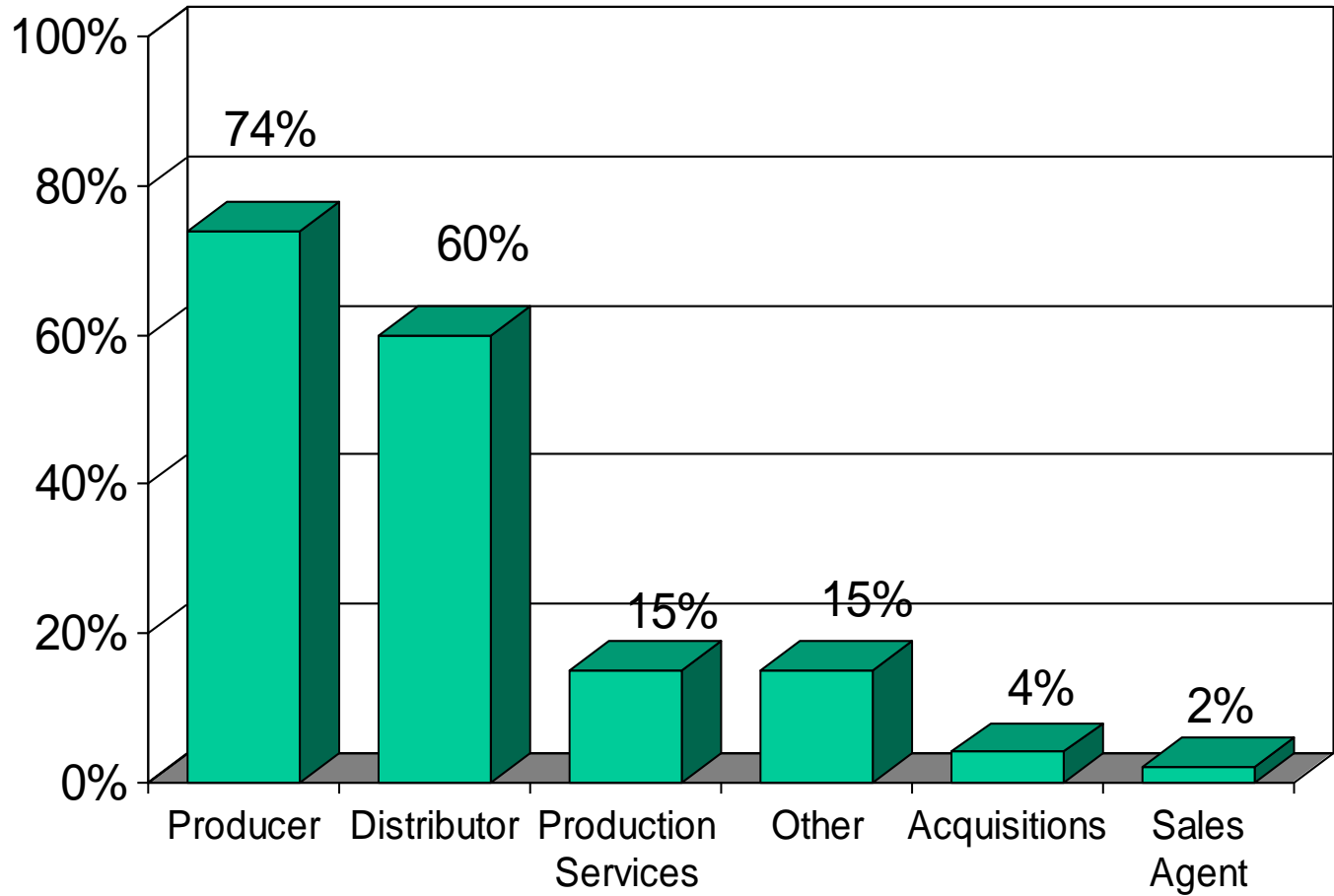
Sample and Respondents by Province

- 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	19	15	13
Ontario	30	22	22
British Columbia	6	6	6
Alberta	3	2	2
Manitoba	1	0	0
New Brunswick	1	1	1
Nova Scotia	1	1	1
Saskatchewan	4	4	2
Total	65	51	47

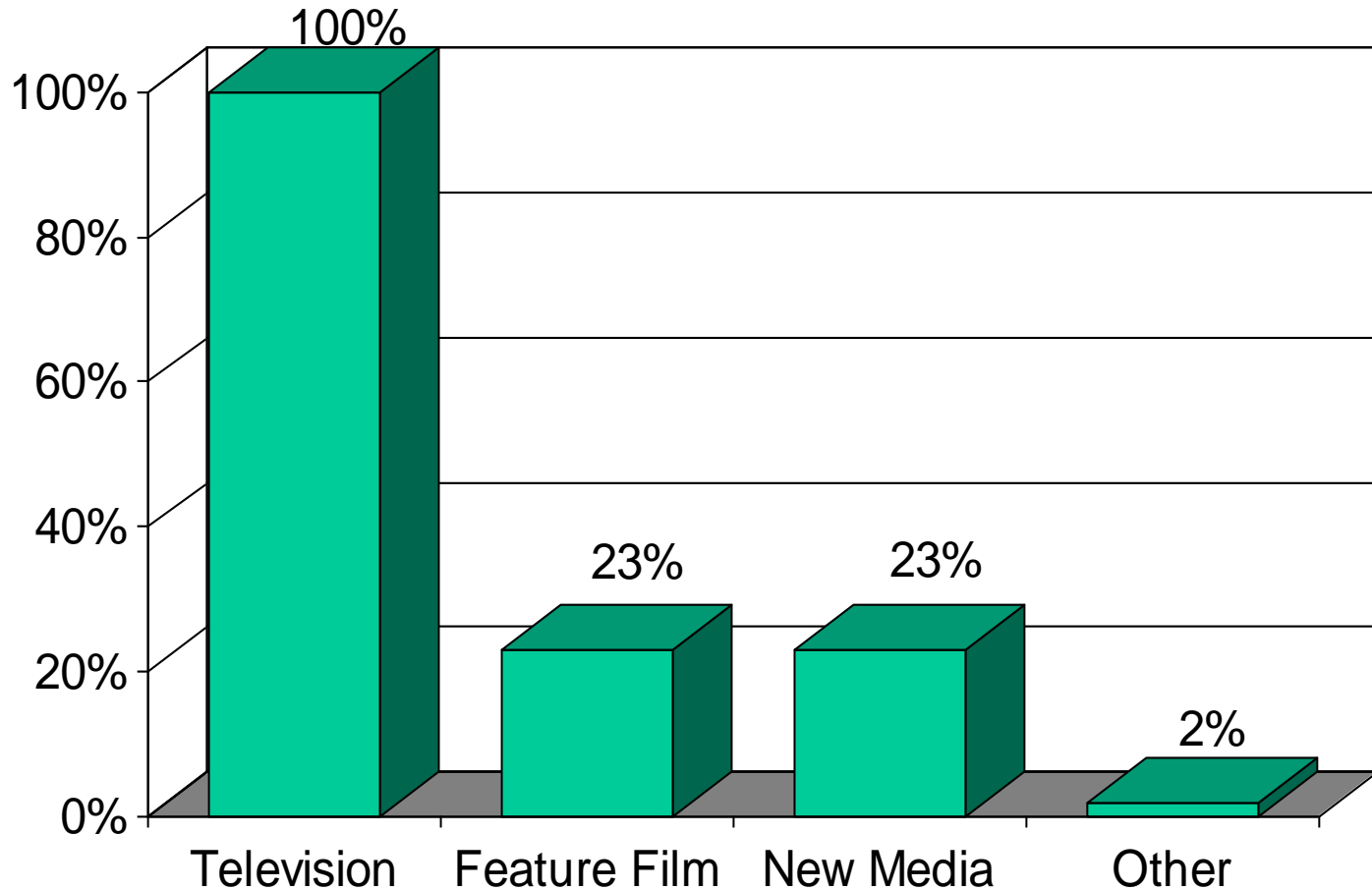
Respondent Profile

Primary Business Focus of Company



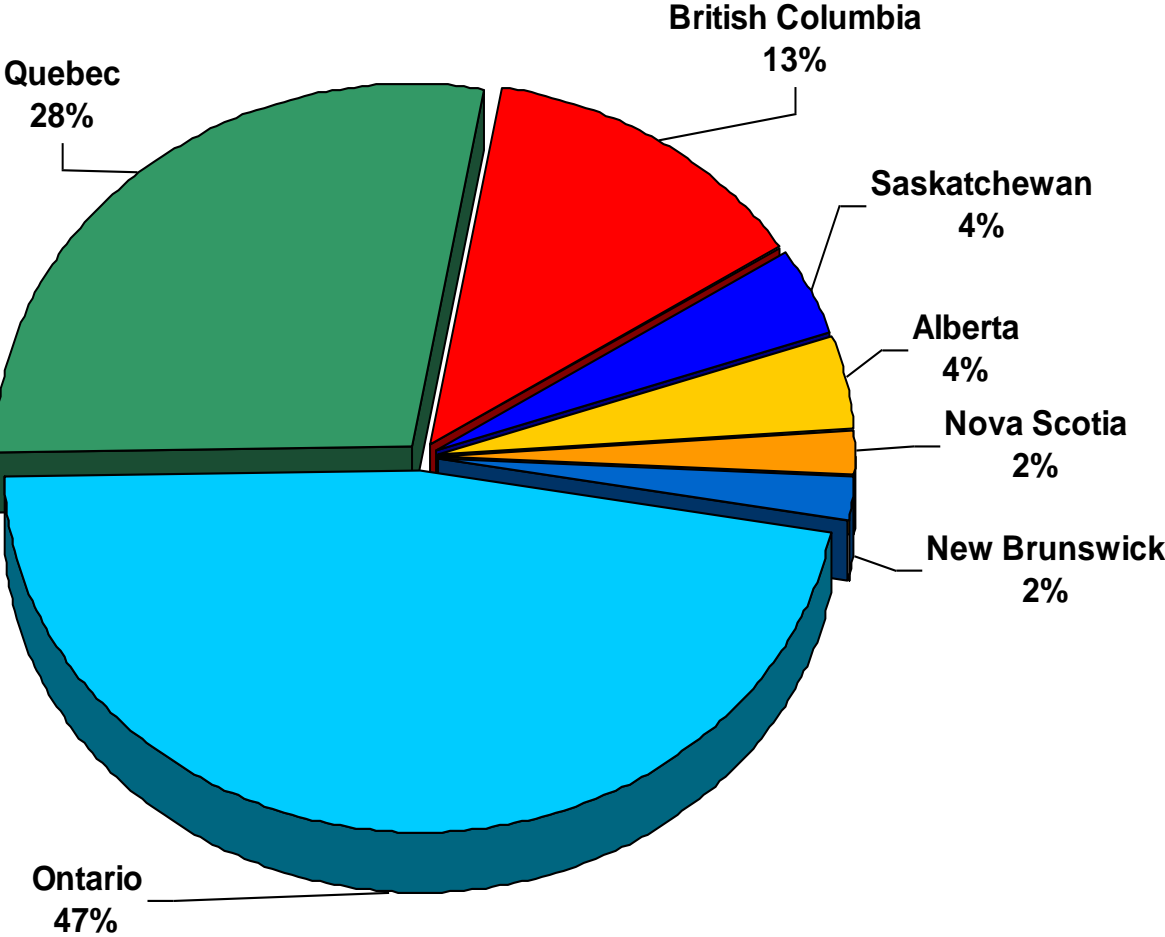
Q1. What is the primary business focus of your company? *Select all that apply.*
N=47

Main Format(s) of Interest



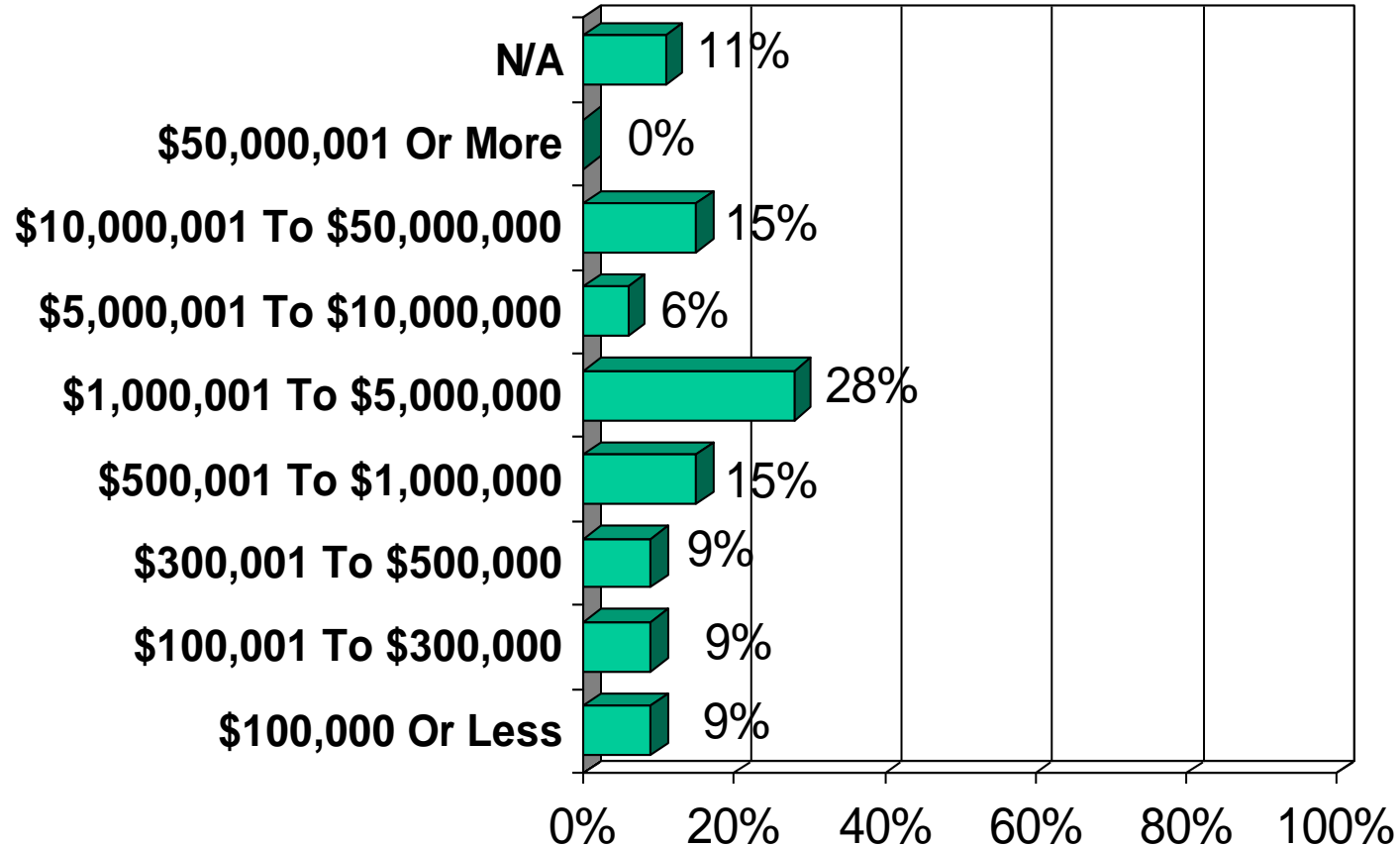
Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=47

Location of Head Office



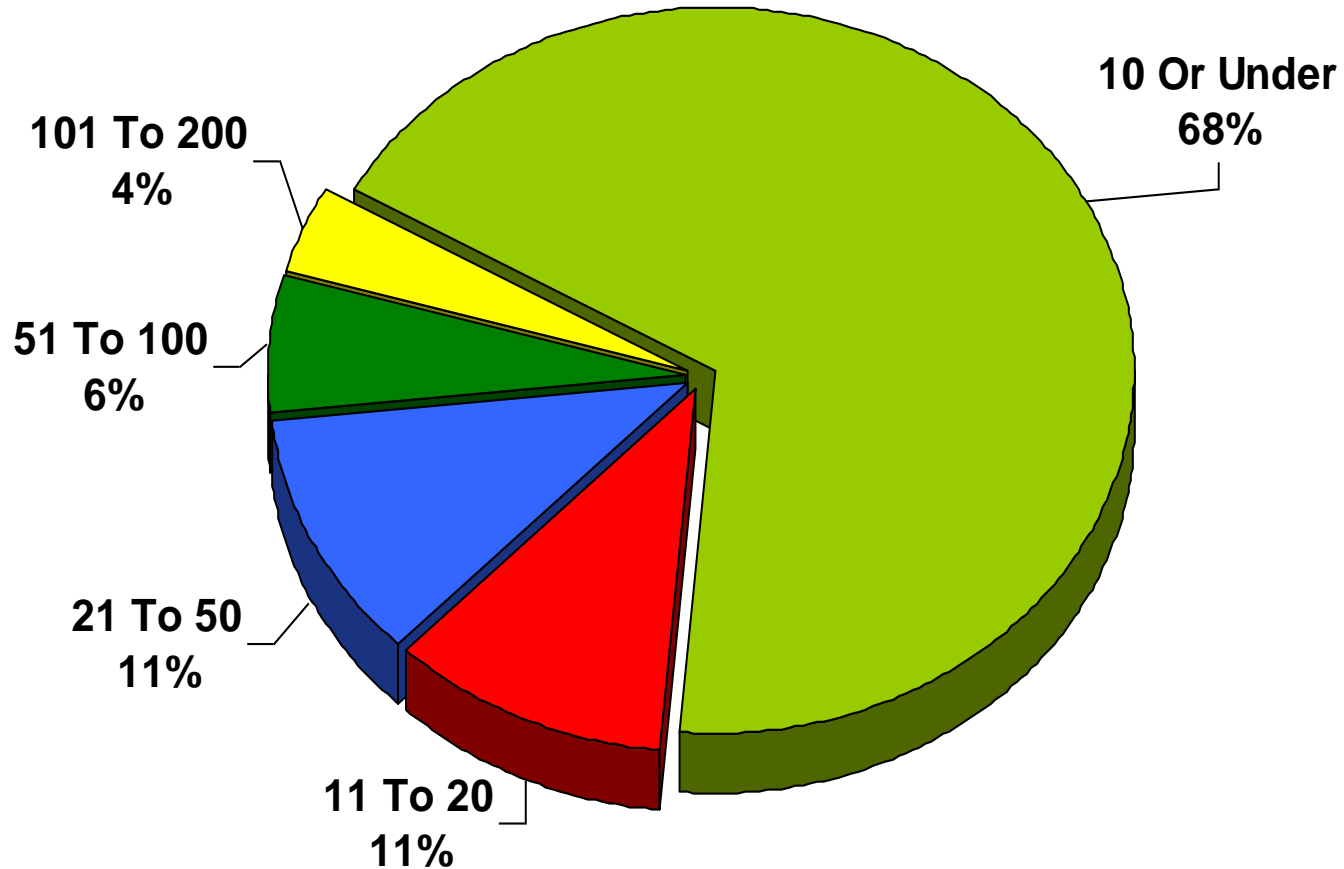
Q3. In which province/territory is your head office located? N=47

Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?
N=47

Number of Employees



Q5. How many full-time employees are there currently in your company?
N=47

The Film Market

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

	Genre (Q6)	Feature Film	Television	New Media
Drama	19%	11%	19%	2%
Horror/Thriller	2%	2%	2%	0%
Comedy	19%	2%	19%	2%
Action/Adventure	15%	11%	13%	4%
Reality	26%	0%	26%	4%
Documentary/Educational	68%	9%	68%	15%
Animation	28%	6%	26%	9%
Public Affairs	9%	0%	9%	4%
Children's Programming	32%	2%	32%	11%
Sports	9%	0%	9%	6%
Lifestyle	45%	0%	45%	13%
Performing Arts	9%	2%	9%	0%
Other	6%	0%	4%	2%

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

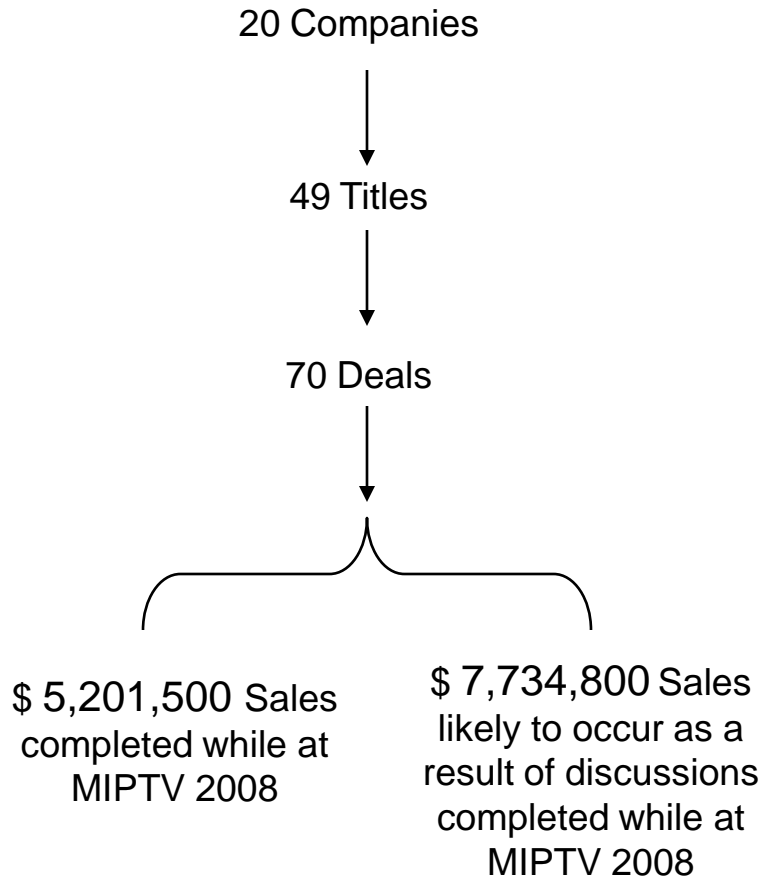
Q7. For each of the programming genre(s) of interest to your company, what was the type of media? N=47

Sales & Pre-Sales

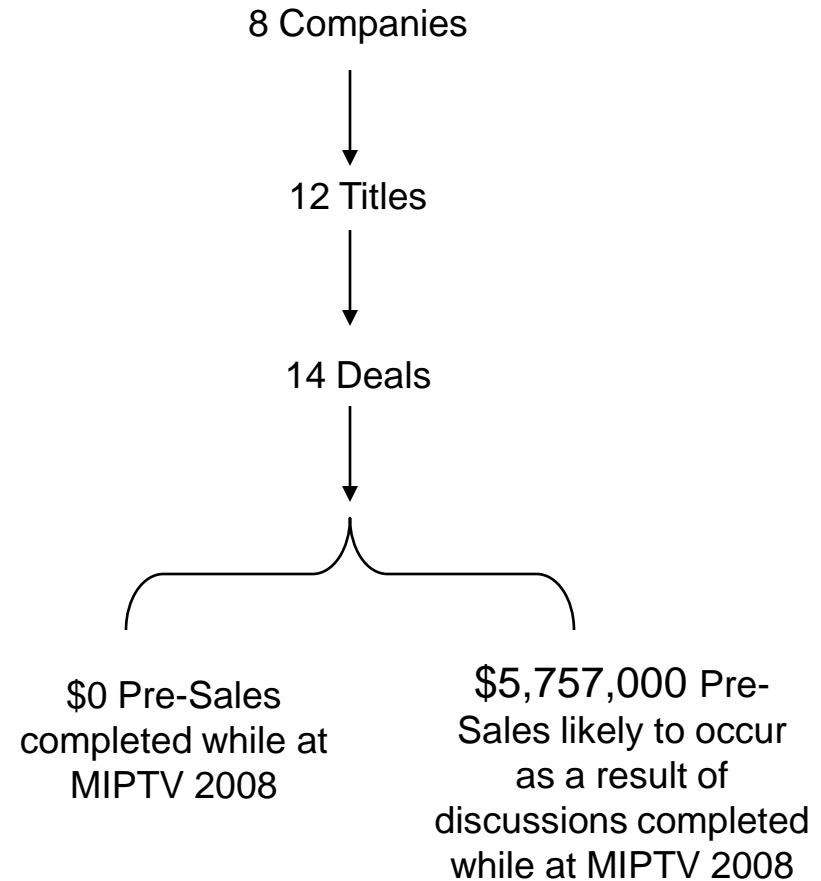
- 45 (96%) companies indicated that they either completed sales while at MIPTV or began discussions that are likely to lead to sales.
- 20 companies indicated that they either completed pre-sales while at MIPTV or began discussions that are likely to lead to pre-sales.
- In all, 23 companies provided information on 84 deals involving 58 titles.
- Companies reported that 19 distribution agreements were signed.
- Respondents reported that \$5,201,500 of sales were completed while at MIPTV 2008 and that \$7,734,800 worth of sales are likely to occur as a result of discussions initiated at the market.
- Companies reported \$0 worth of presales at MIPTV although they do expect \$5,757,000 of pre-sales to occur as a result of discussions initiated at MIPTV 2008.

Breakdown of Sales and Pre-Sales Deals

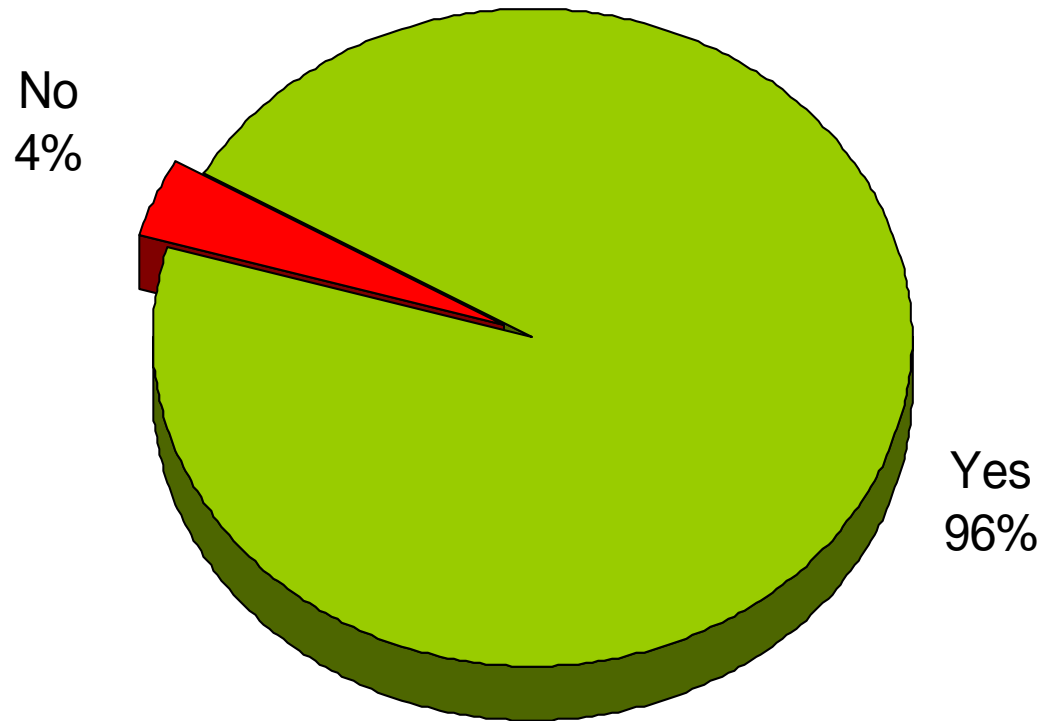
Sales/Likely Sales



Pre-Sales/Likely Pre-Sales

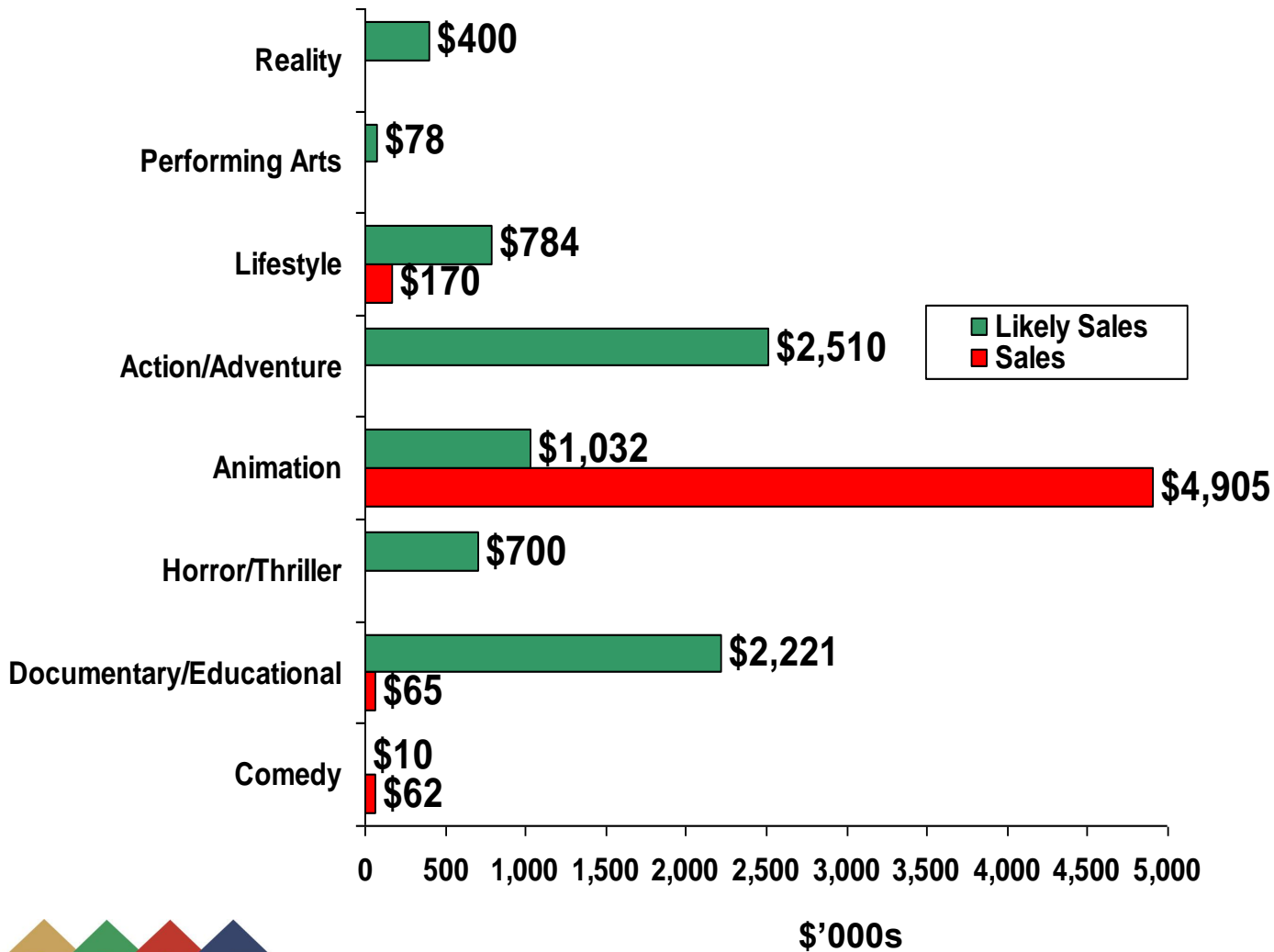


Sales



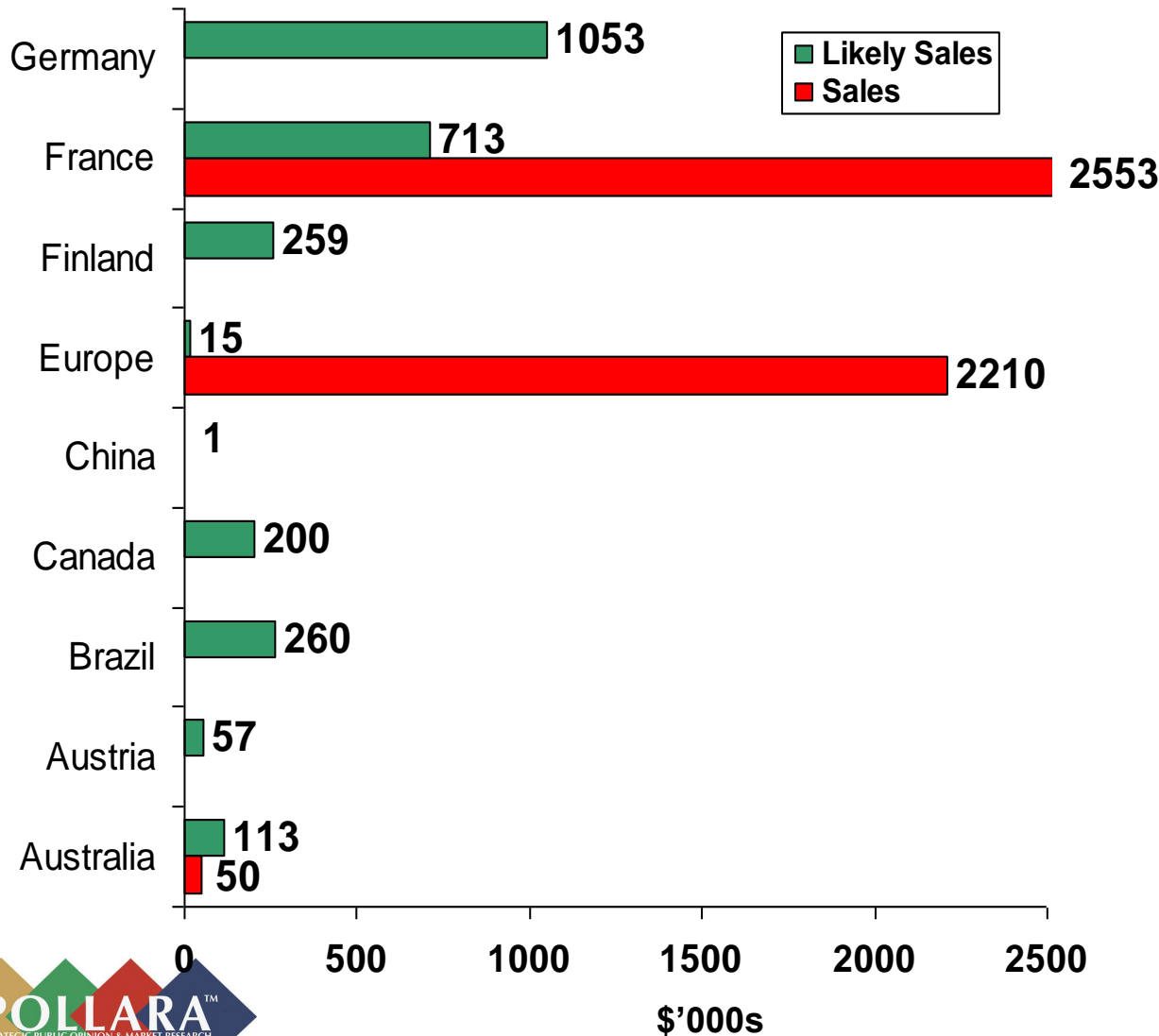
Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at MIPTV 2008? N=47

Breakdown of Likely Sales and Sales by Genre



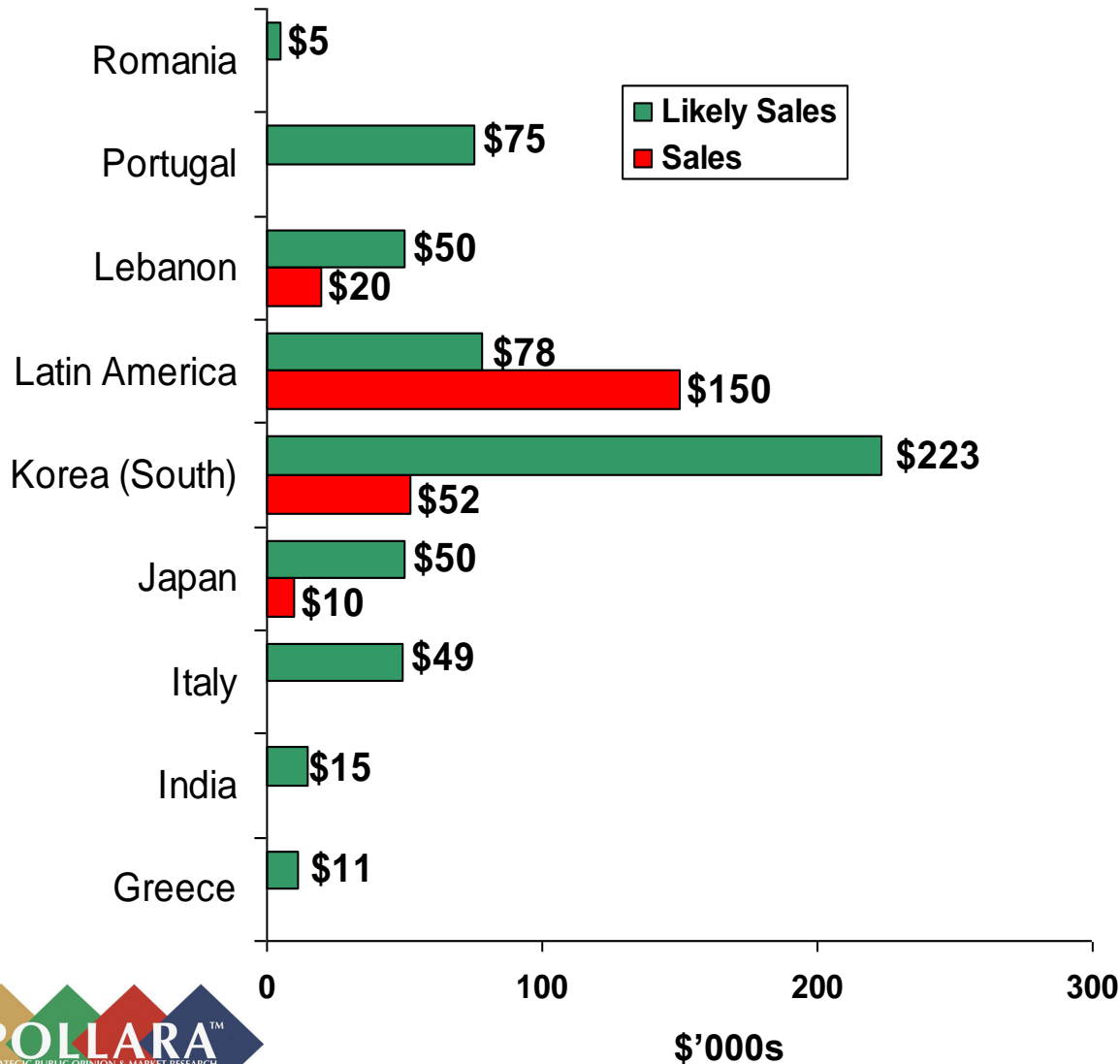
Comp	Titles	Deals
1	1	1
1	1	1
7	13	22
2	2	2
6	10	15
1	2	4
10	19	23
1	1	2

Breakdown of Likely Sales and Sales by Country



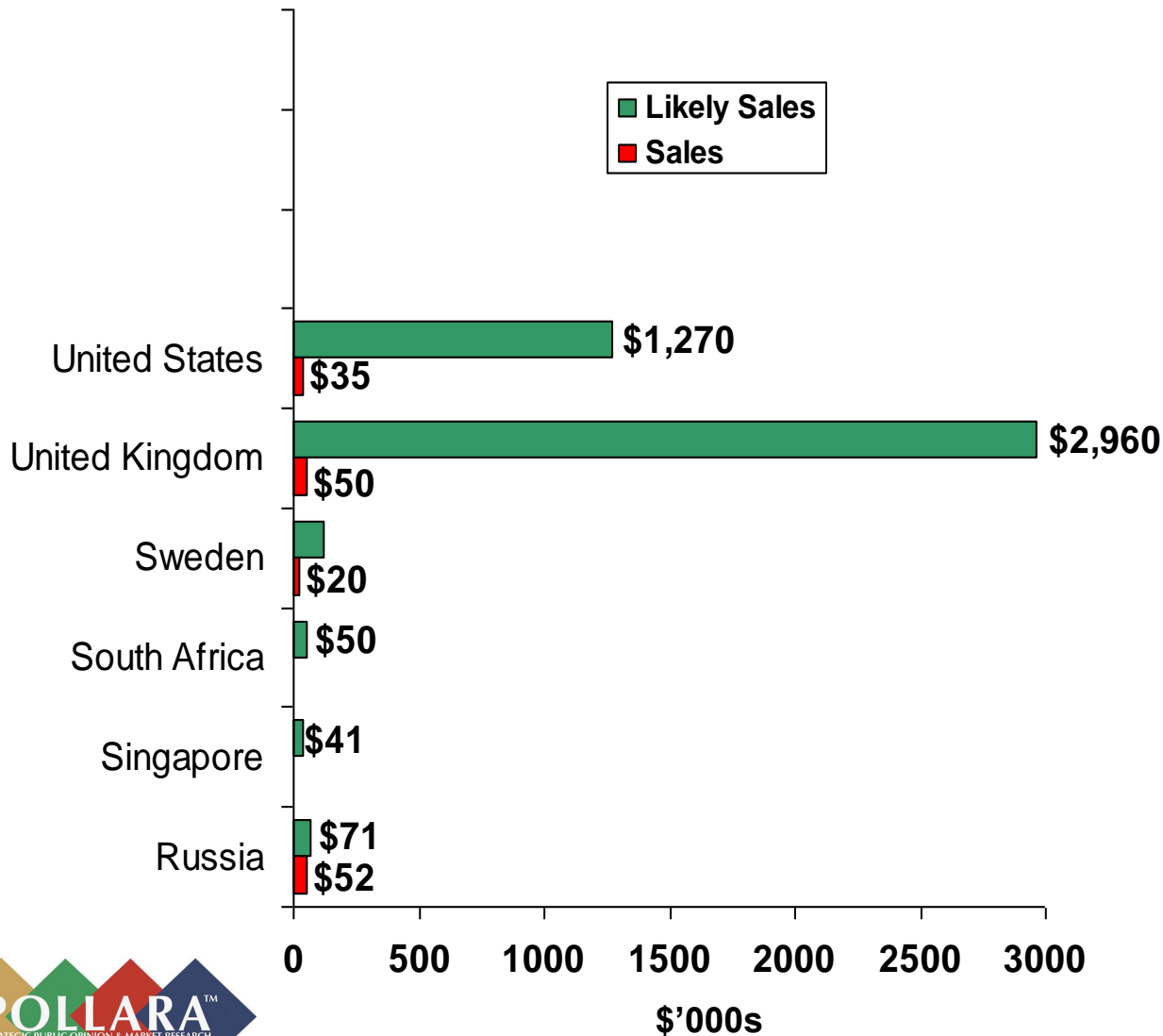
Companies	Titles	Deals
3	4	4
7	11	11
2	3	3
2	2	2
1	1	1
4	5	5
1	1	1
1	3	3
2	3	3

Breakdown of Likely Sales and Sales by Country



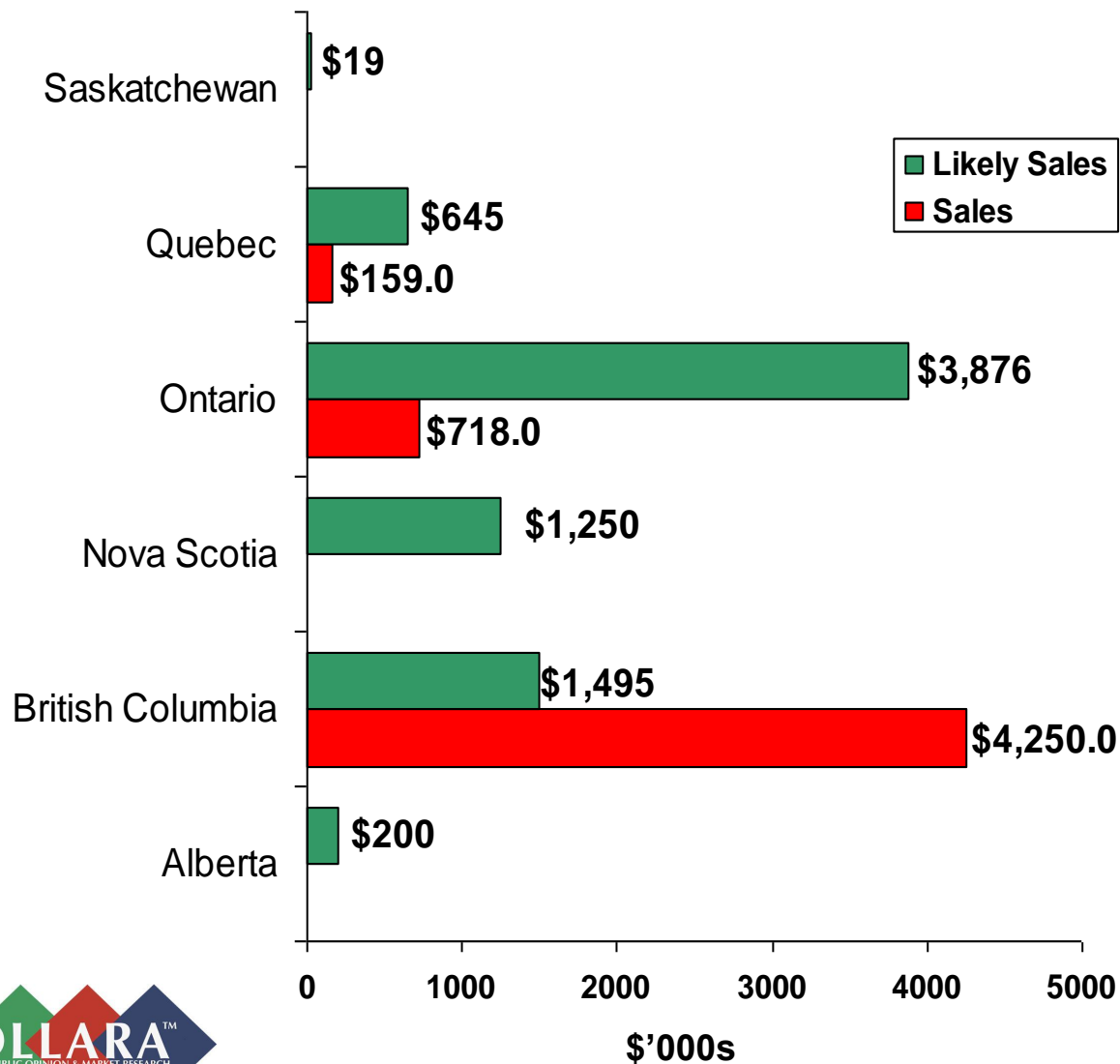
Companies	Titles	Deals
1	1	1
1	1	1
1	1	1
2	4	4
3	4	4
1	1	1
1	1	1
1	1	1

Breakdown of Likely Sales and Sales by Country



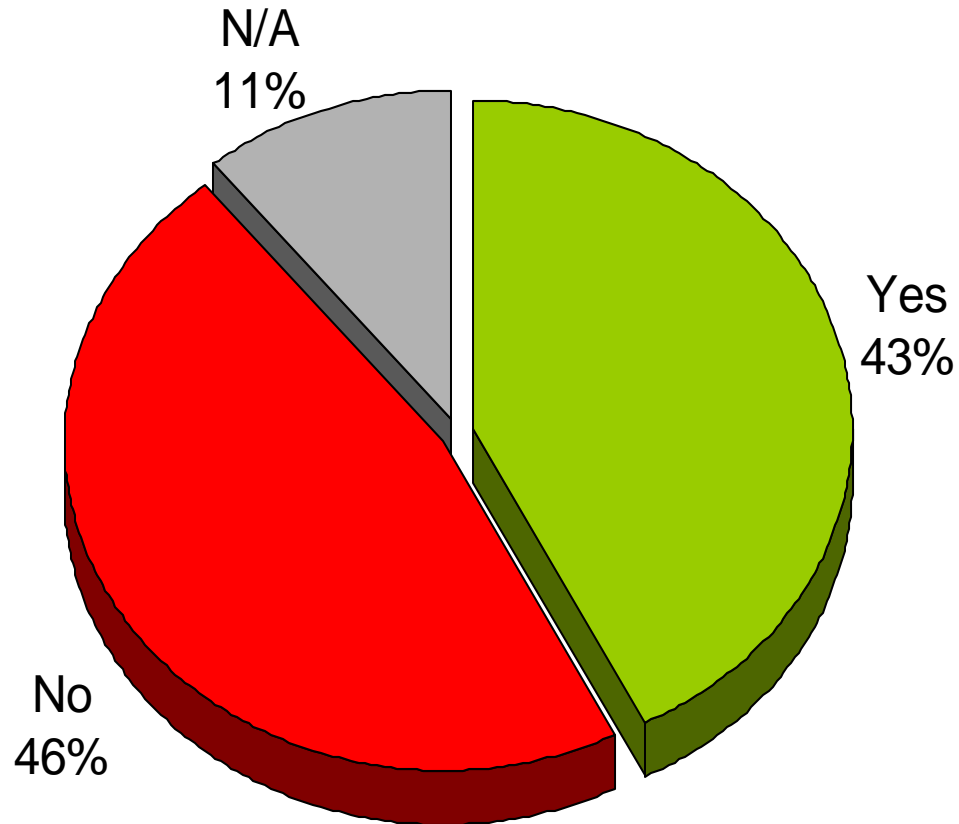
Companies	Titles	Deals
4	5	5
5	6	7
2	2	2
1	1	1
2	2	2
4	5	5

Breakdown of Likely Sales and Sales by Company Region



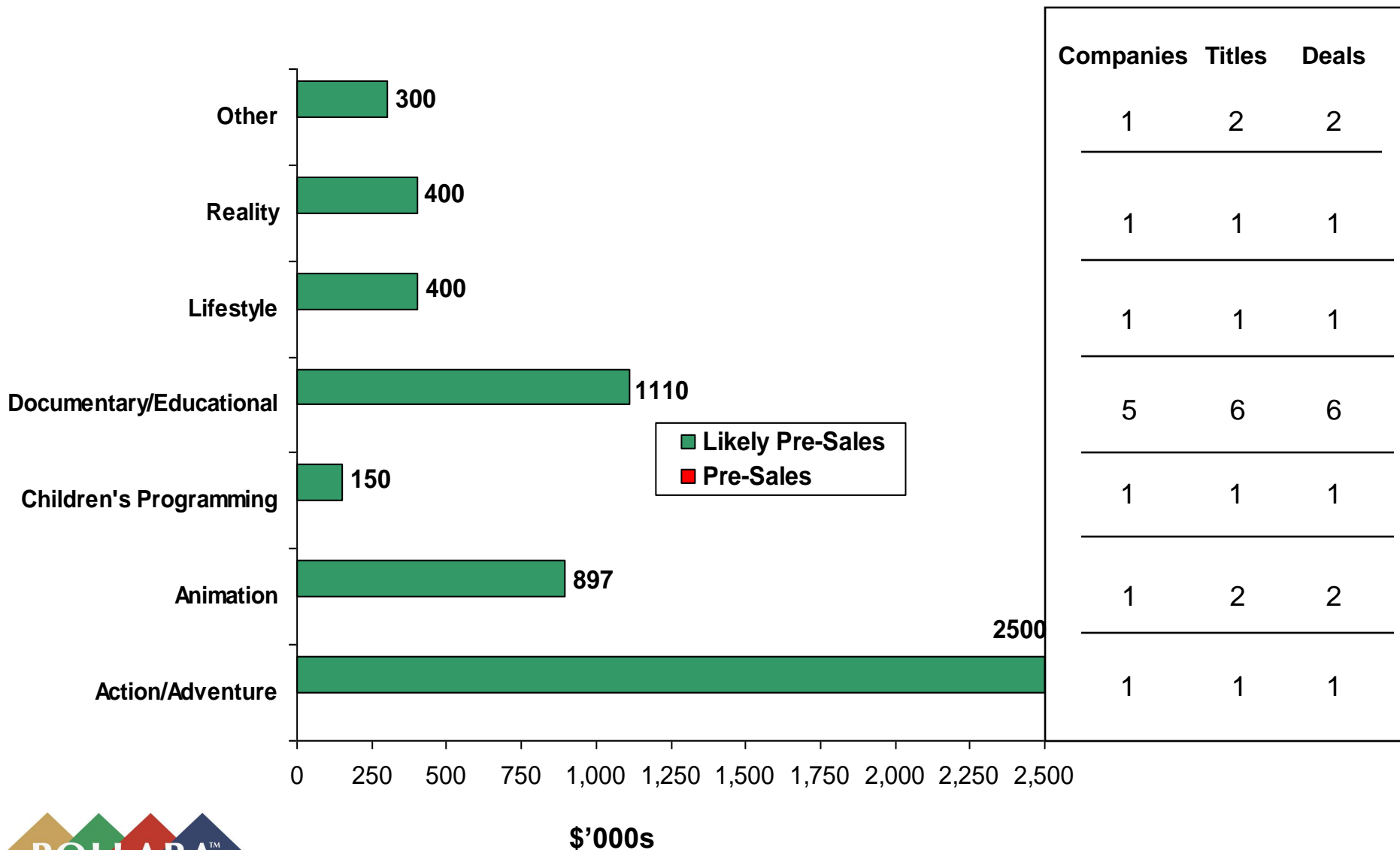
Companies	Titles	Deals
1	1	1
1	10	13
8	21	36
1	3	4
4	9	12
1	1	2

Pre-Sales

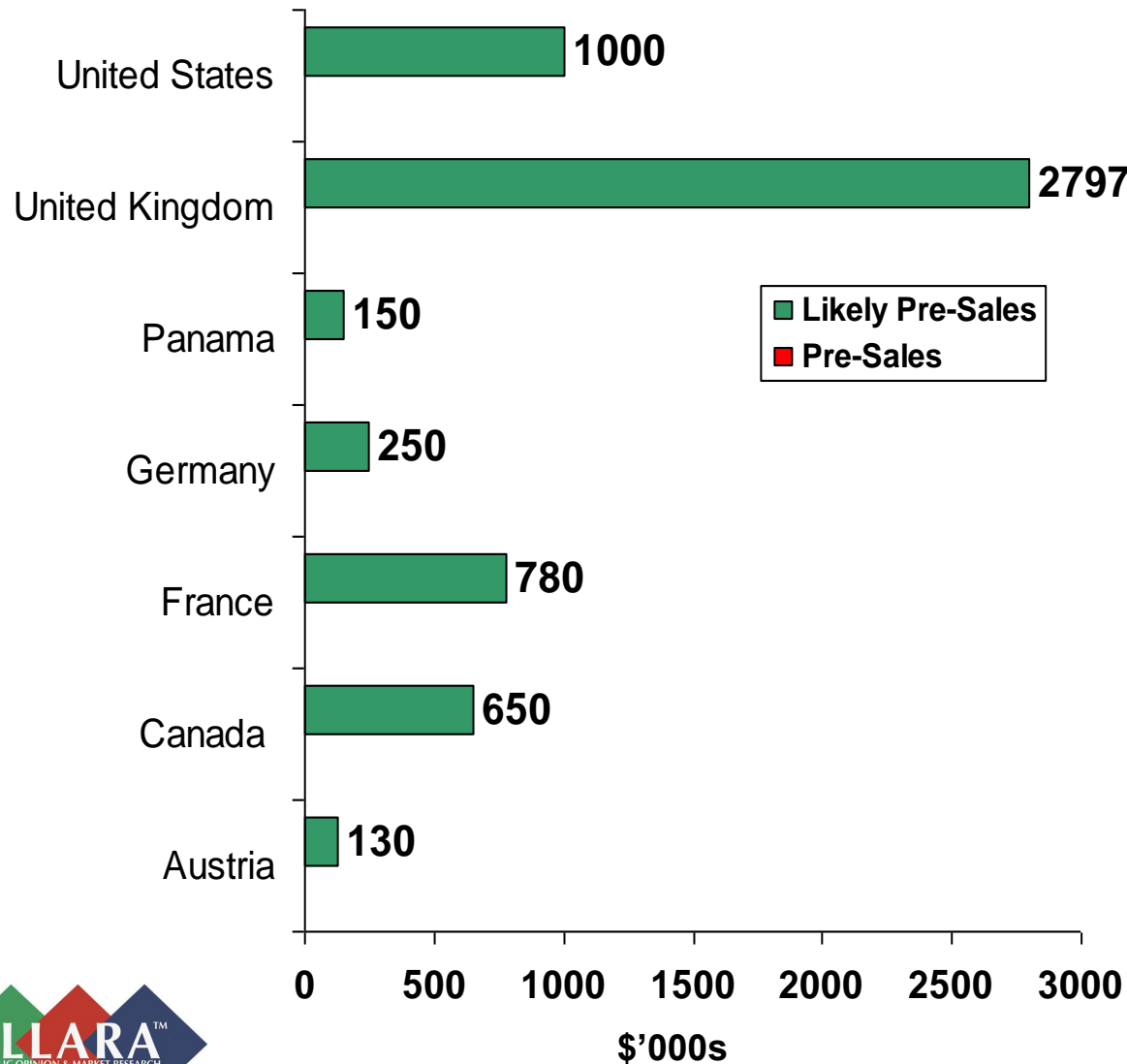


Q8e. Did you complete any pre-sales or begin discussions that will likely lead to pre-sales while at MIPTV 2008? N=47

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

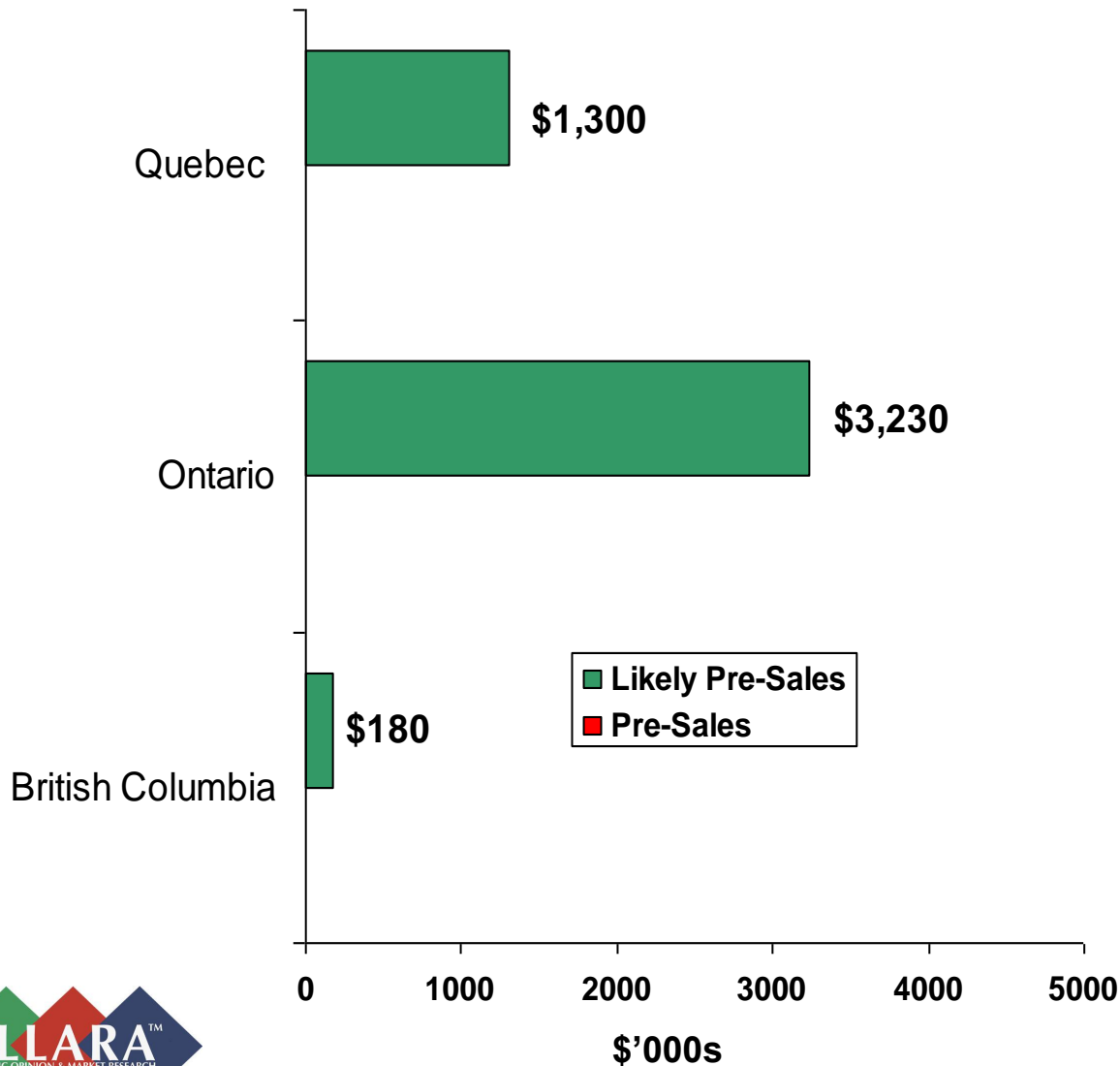


Breakdown of Likely Pre-Sales and Pre-Sales by Country



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

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



Companies	Titles	Deals
1	2	2
<hr/>		
4	6	6
<hr/>		
1	2	2

Co-Production and Co-Venture Deals

- 10 companies (21% of those who answered the question) indicated that they either signed, or began negotiating co-production or co-venture deals while at the MIPTV 2008.
- All 10 of these companies declared that 17 co-production or co-venture deals were either signed or would likely be signed as a result of discussions at MIPTV 2008.
- 5 companies provided information about the value of co-production or co-venture deals - and reported that the deals were worth \$13,400,000.
- 7 companies provided information about the countries with which deals were made.
- Respondents reported that they participated in an average of 39 business meetings each while at MIPTV 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	3	\$1,000,000	France
2	1	\$1,200,000	Australia
3	1	-	-
4	1	\$5,000,000	Europe
5	1	-	France
6	2	\$200,000	United Kingdom
7	1	-	Canada
8	1	\$6,000,000	Netherlands/Holland
9	5	-	-
10	1	-	-

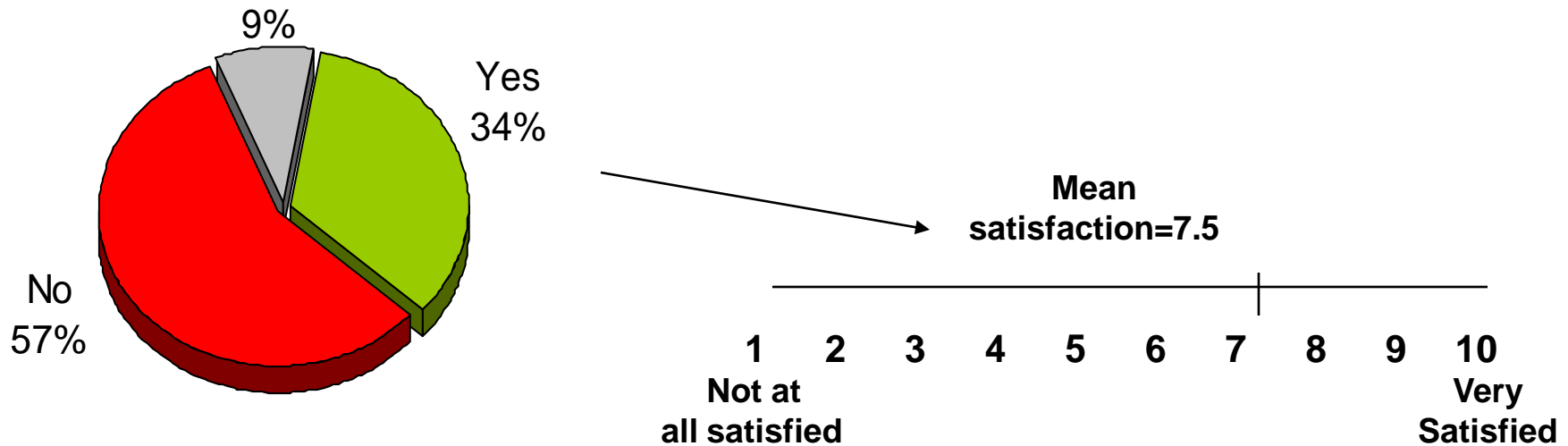
Co-Production and Co-Venture Deals by Company Region

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	1	1	\$5,000,000
Quebec	2	8	\$1,000,000
Ontario	7	8	\$7,400,000

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

Title Screening

- 17 respondents (34%) indicated that they had a title screened at MIPTV 2008. (31% in 2007 where n=64)
- These respondents gave an average satisfaction score of 7.5 for the visibility their titles received from the screenings. (7.4 in 2007 where n=20)

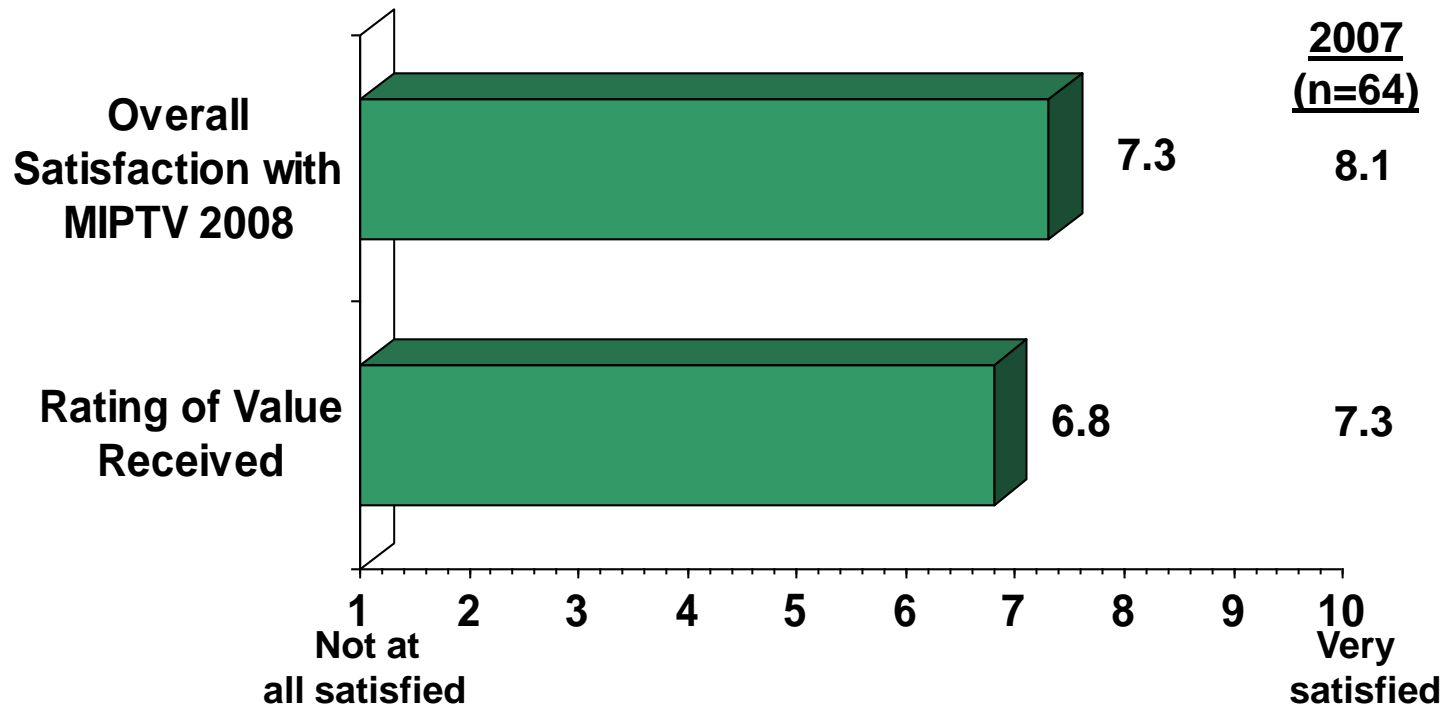


Q11. Were any of your titles screened at MIPTV 2008? (n=47)

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=17)

Overall Satisfaction With, and Value of, MIPTV 2008

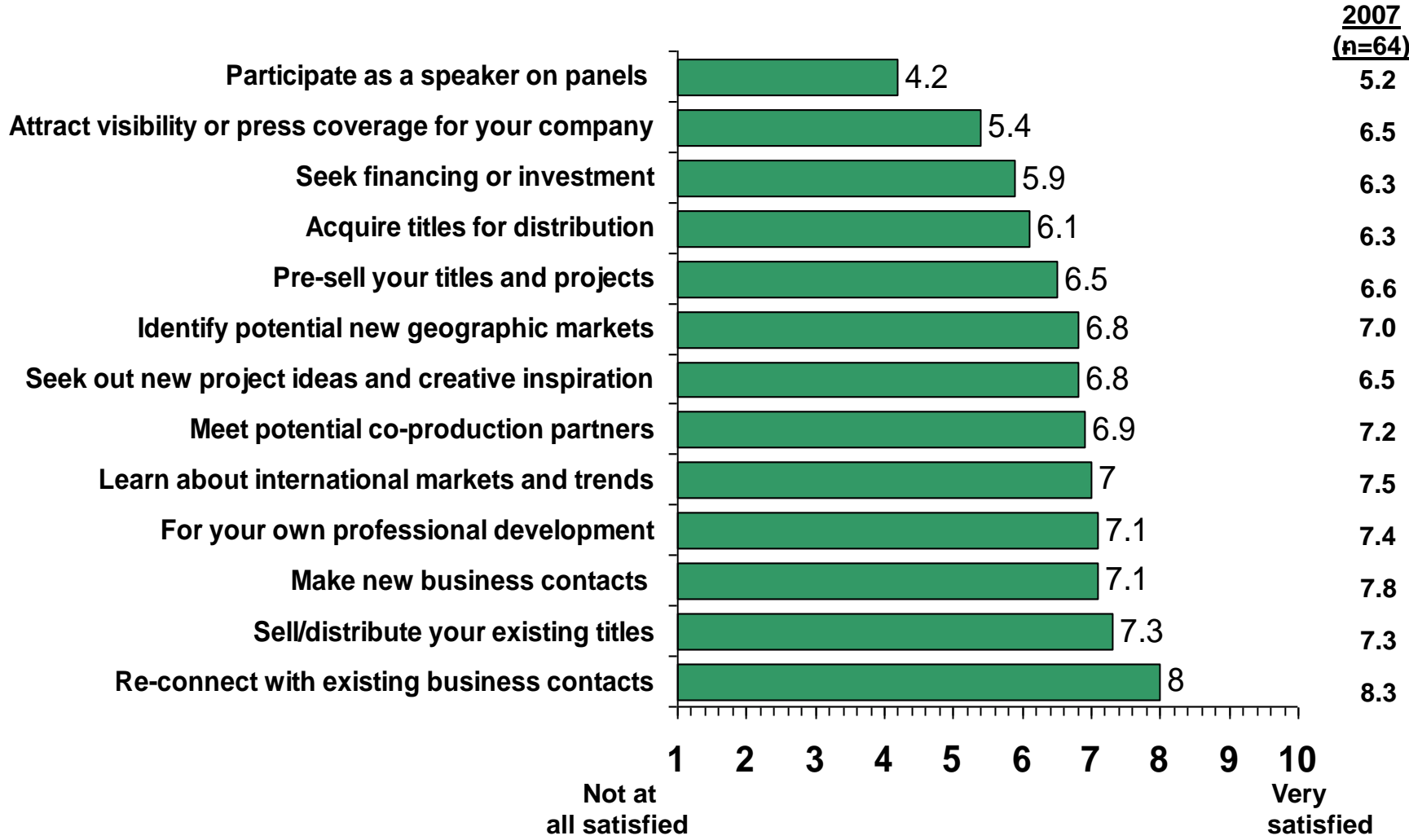
- When rating the overall satisfaction with MIPTV 2008 over 7 in 10 (7.3 out-of-ten) companies are satisfied (Down 8 points from 2007).



Q13a. How satisfied would you say you were overall with MIPTV 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. N=47

Q13b. And thinking about what it costs your company to attend, and the quality of the services and support provided at MIPTV 2008, how would you rate the VALUE you received on the same 1-10 scale...? N= 47

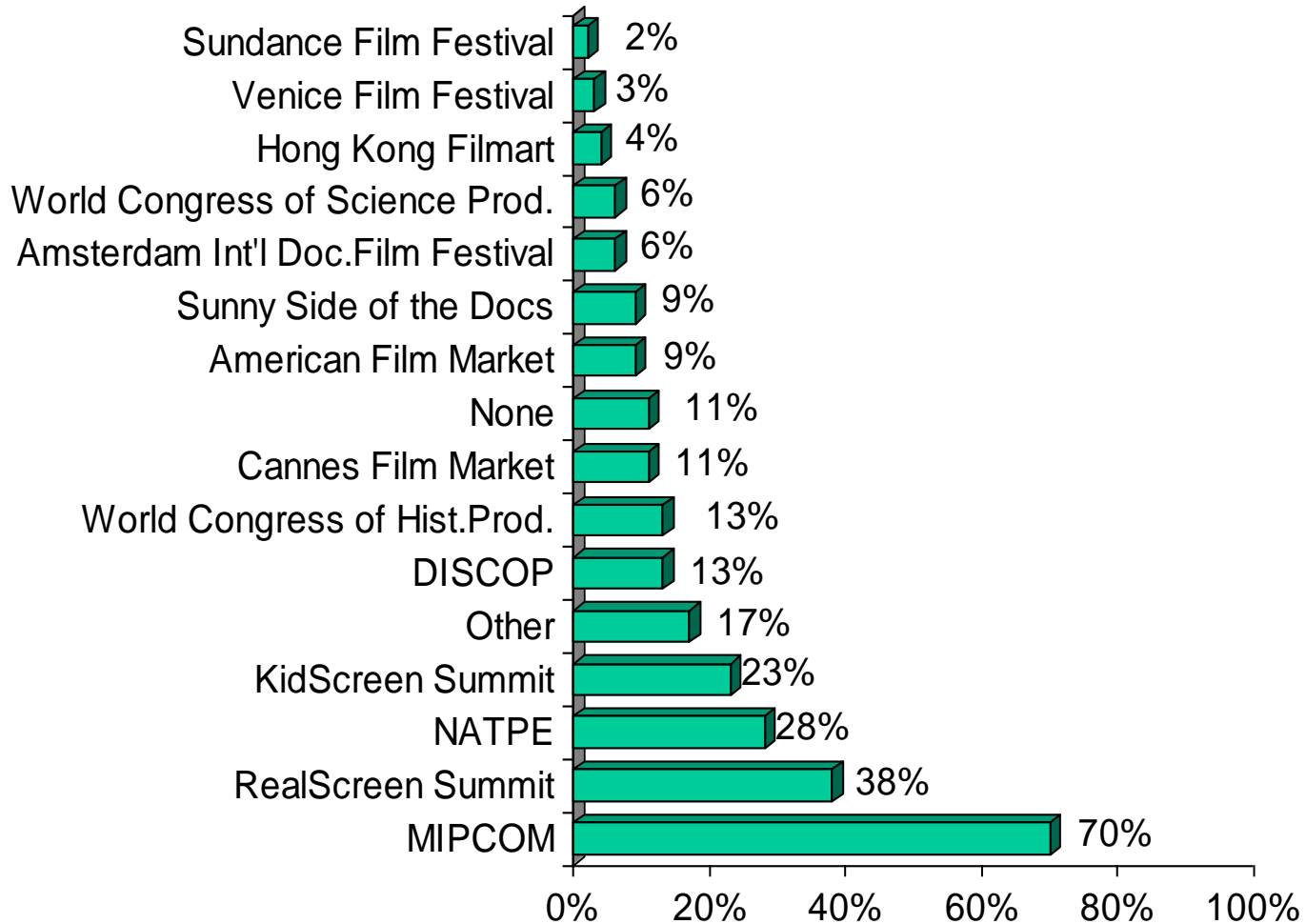
Satisfaction with MIPTV 2008



Q13c. How satisfied were you with MIPTV 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=47

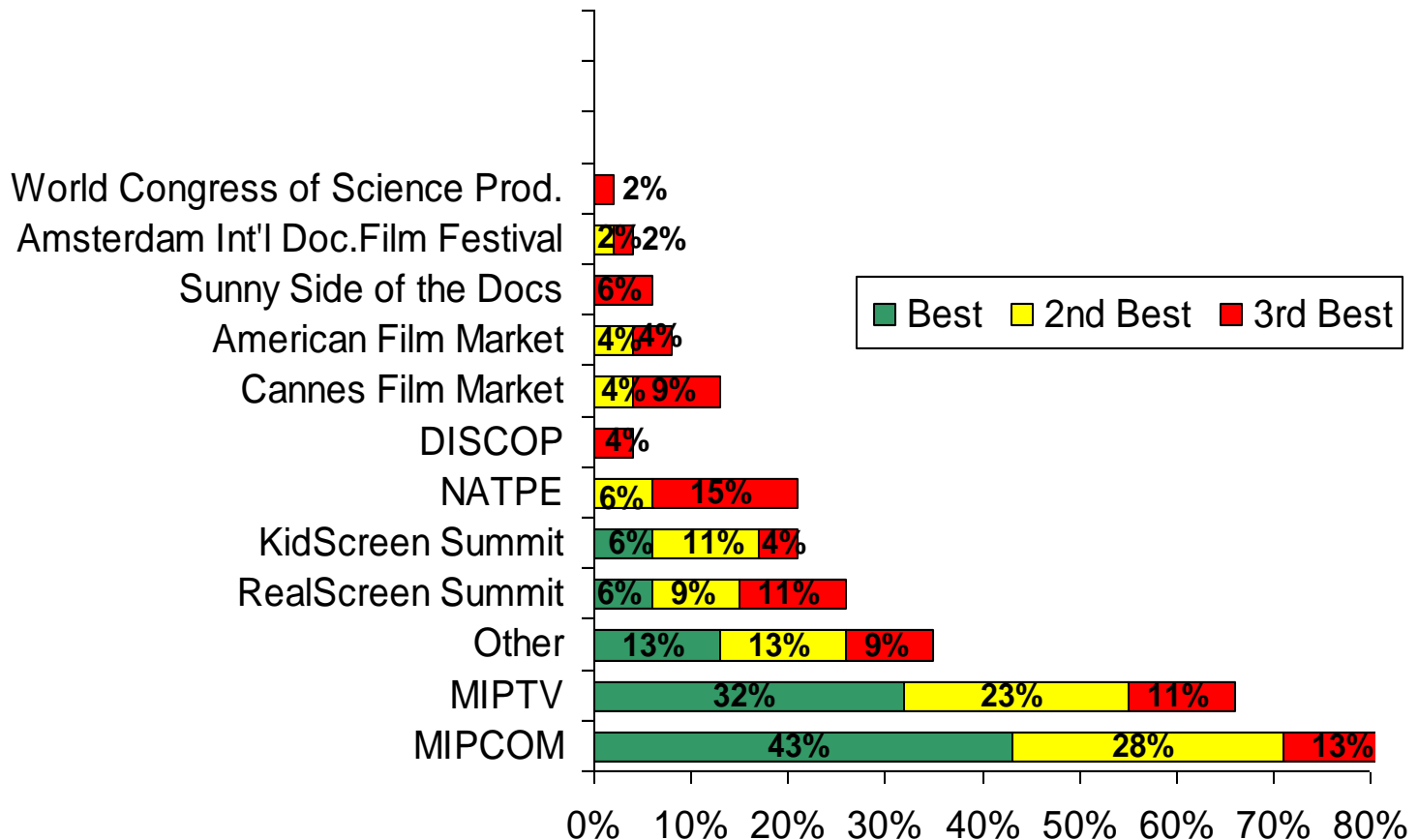


International Markets & Festivals Attended



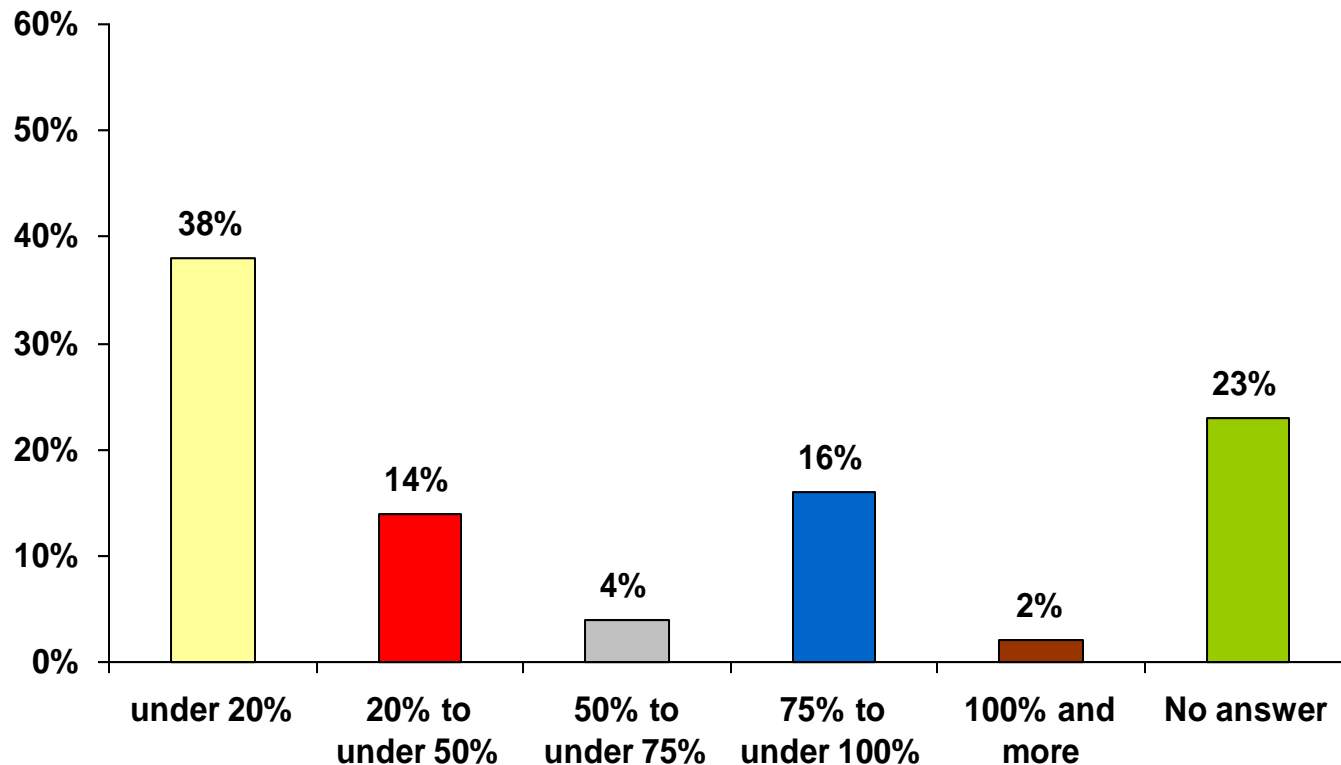
Q14. Which, if any of the following international markets and festivals held in other countries have you attended during the past two years? *Select all that apply*
N=47

Rating of International Festivals & Markets



Q15a,b,c Thinking of MIPTV 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=42

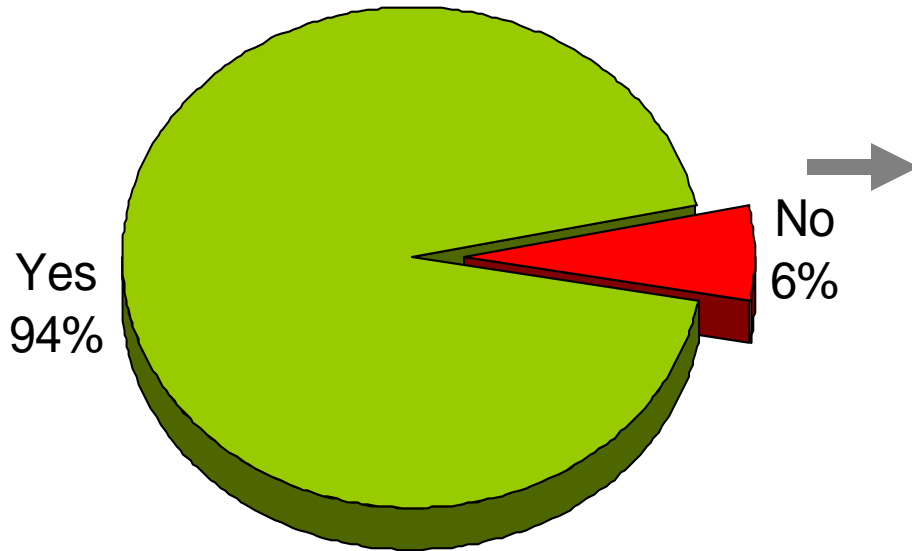
Percentage of sales from international sales



Q16. What percentage of your company's gross revenues in the most recent fiscal year came from international sales? N=47

Used Services of Canada Pavilion?

Used Canada Pavilion?



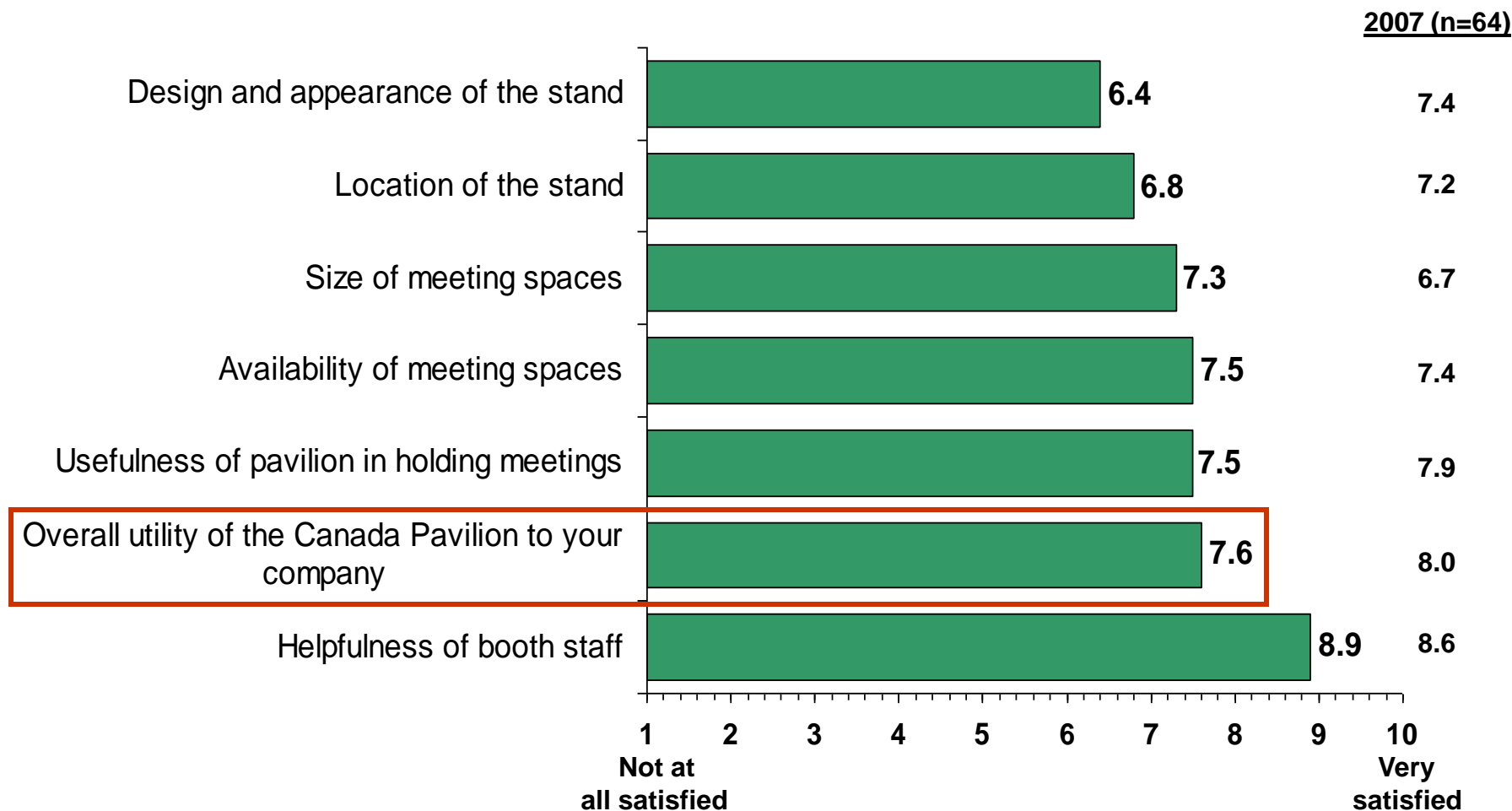
Why Not?

- *"I basically just use my space for international sales meetings and nothing else."*
- *"All of our meetings were located elsewhere."*

Q17 Did you use the services provided by the Canada Pavilion at MIPTV 2008? N=47

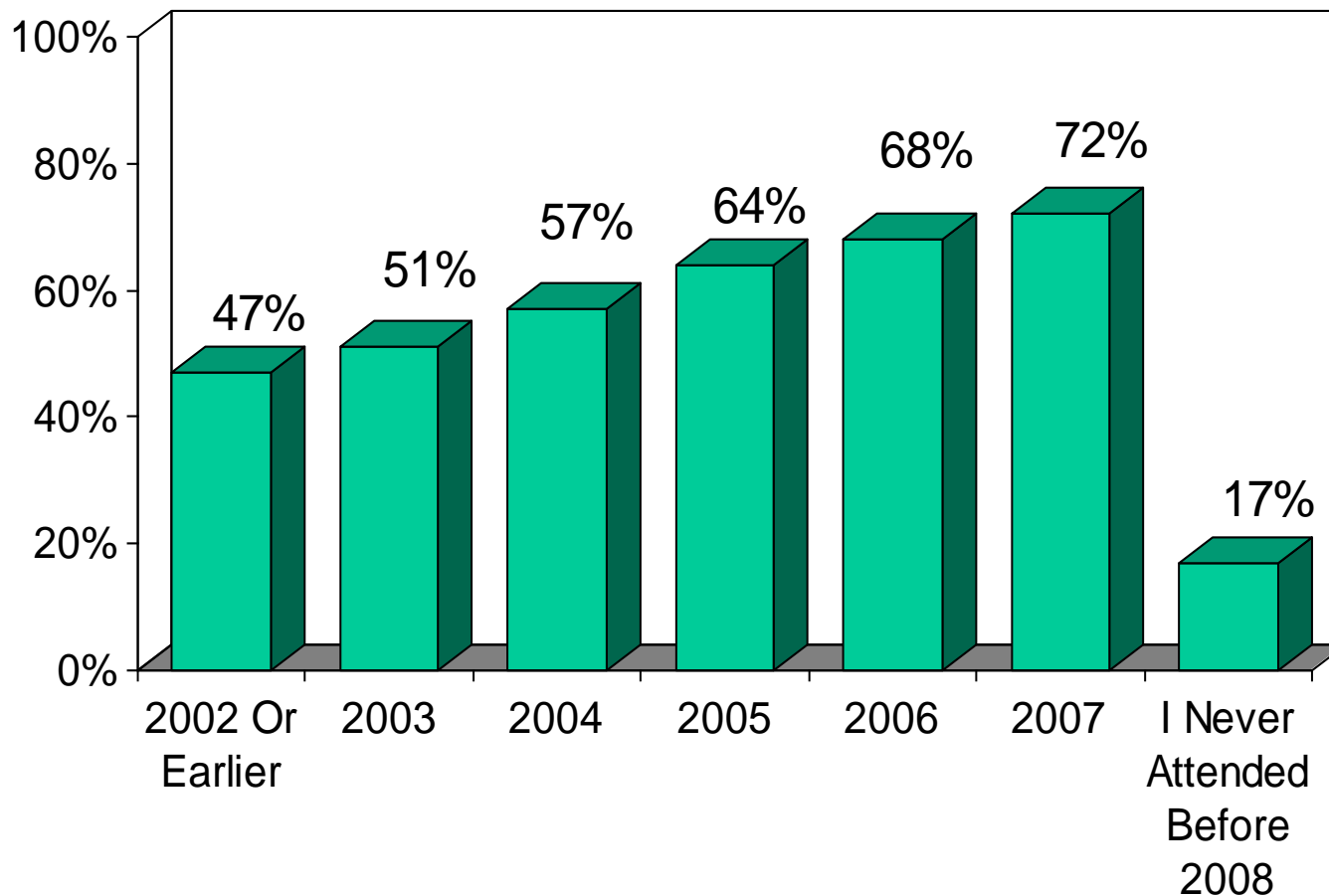
Q18 (IF "NO" TO Q17) Why didn't you use the services provided at the Canada Pavilion? N=3

Satisfaction with Canada Pavilion



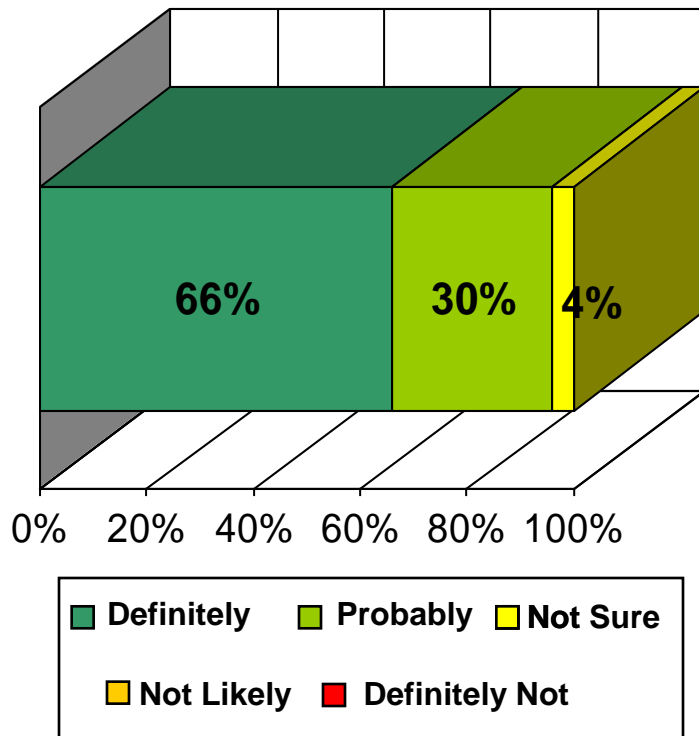
Q19 (THOSE WHO DID USE THE CANADA PAVILION) Please rate your level of satisfaction with each of the following aspects of the Canada Pavilion at MIPTV 2008 using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. If a particular item does not apply, select “not applicable.” N= 44

Past Attendance at MIPTV events



Q21. Which previous MIPTV events, if any, has your company attended?
Select all that apply
N=47

Likelihood of, and Reasons for, Recommending MIPTV to Others



- *“It is a good market and it's changed a lot over the past fifteen or so years I've been attending. It's now much better for pre sales than it was when it was just simply finished programming”.*
- *“MIPTV is still the best international market to connect with potential partners from around the world and keep in touch with people in the industry.”*
- *“Very cost effective way for small production companies to build relationships with Intl. broadcasters and secure pre-sales.”*
- *“I thought it was a great place to reconnect with other broadcasters from Canada (who aren't located where I am) and it was a great place to start making international contacts. Since I want the business to grow internationally this is a great market for that. Same with my colleagues from other production companies!”*
- *“Was very meaningful for a first time exhibitor.”*

Q22a. Would you recommend MIPTV to other companies in the Canadian audio-visual industry? N=47

Q22b. Please explain your answer.

Cost of Attending MIPTV 2008 and Funding Received

- Companies incurred an average cost of \$15,917 in attending the MIPTV 2008.
- 32% of respondents (15 companies) indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend MIPTV 2008.
- Two companies reported receiving federal funding in amount of \$3,000 and \$3,300. The median amount was \$3,150.
- Seven companies indicated that they had received provincial funding ranging in amount from \$2,000 to \$5,000. The median amount was \$3,214.

Q24. Did you receive any funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend MIPTV 2008? N=47

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

Conclusions

Conclusions

- Similar to 2007 (98%), television continues to be the most popular format of interest (100%) in 2008 for companies attending MIPTV. Interest in feature film is almost identical among companies in 2007 (23%) compared to last year (25%) and slightly lower for new media (23%) in 2008 compared to 2007 (29%).
- In deciding to attend MIPTV 2008, Documentary/Educational (68% overall) was the programming genre of most interest in selling and/or pre-selling. Specifically, Drama (11%, up 2 percentage points) and Action/Adventure (11%, up 6 percentage points) were the most popular genre for feature film formats. For television, Documentary/Educational continued to be the most popular genre (68%), up from 2007 (61%). For New Media, Documentary/Educational (15%) was the most popular genre of programming that companies were interested in selling.

Conclusions

- More than nine-in-ten (96%) of participating companies either completed sales, or began discussions that are likely to lead to sales while at the event.
- Forty-three percent either completed pre-sales, or began discussions that are likely to lead to pre-sales.
- Less than one-quarter of respondents (21%) either signed or began negotiating co-production or co-venture deals.
- Slightly over three-in-ten (34%) indicated that they had their title screened.
- These respondents gave an average satisfaction score of 7.5 out-of-ten for the visibility their titles received from the screenings.
- Respondents' overall satisfaction with the market was 7.3 out-of-10 (down 8 points from 2007).

Conclusions

- A slightly lower rating (6.8) was indicated for the value received for the money.
- Participants were most satisfied with MIPTV 2008 for re-connecting with existing business contacts (8.0 out-of-ten) and selling/distributing your existing titles (7.3 out-of-ten).
- The participating companies were least satisfied with the objective of participating as a speaker on panels (4.2 out-of-10).

Conclusions

- More than nine-in-ten (94%) respondents used the services provided by the Canada Pavilion at MIPTV 2008.
- They rated their satisfaction with the overall utility of the Canada Pavilion quite high, 7.6 out-of-ten (down 4 points from 2007).
- Participants were most satisfied and dissatisfied with the following aspects of the Canada Pavilion:
 - The helpfulness of booth staff (8.9)
 - Usefulness of pavilion in holding meetings (7.5)
 - Availability of meeting spaces (7.5)
- They were least satisfied with the stand in terms of the design and location of it. Specifically:
 - Design and appearance of the stand (6.4)
 - Location of the stand (6.8)

Conclusions

- Although attendees of MIPTV 2008 are generally satisfied (7.3 out-of-ten) with the market itself and with the services provided by the Canada Pavilion (7.6 out-of-ten), a decline in satisfaction levels was evident.
- Telefilm could allow for more participation on speaker panels and increase awareness of the event through press coverage.
- Telefilm should look at ways of re-designing the pavilion to allow for clear visibility of companies participating. In addition, a social event day is recommended to help companies network and help build the Canada brand internationally.



**101 Yorkville Avenue
Toronto, Ontario M5R 1C1
Tel: 416.921.0090 / Toll Free: 1.888.POLLARA
www.pollara.com**