



## **SUMMARY REPORT**

### **CANADIAN FEATURE FILM INDUSTRY FOCUS GROUP ENGLISH LANGUAGE MARKET**

#### **WHY A FOCUS GROUP**

In 2000 the Government of Canada launched the new Canadian feature film policy and set a goal of capturing 5% of the domestic box office by 2006. In meeting this goal it was expected that a more than proportional increase in market share would occur in the English-language market.

As of June 2005, a 5% theatrical market share has been met and maintained, with Canadian films closing the year at 5.3%. This growth in overall domestic market share however is largely the result of the success of French-language films.

Statistics show that although the value of ticket sales for English Canadian films has seen some improvement since 2000, market share has remained relatively flat. In comparison to other countries producing independent films, English Canada's domestic market share is among the lowest in the world. This is an embarrassment to our industry and without a unified and common purpose and commitment from all sectors, public and private, English Canadian films will be hard pressed to garner any success beyond what we see today.

#### **WHAT TELEFILM CANADA WANTED TO ACHIEVE**

To address the issues and challenges facing the English Canadian feature film industry that have contributed to the limited theatrical market share, Telefilm Canada hosted an English-Language Market Focus Group in Toronto on Thursday, January 26, 2006.

The intent of the Focus Group was to take a first step in establishing a new dialogue within the industry towards increasing audiences for English-language Canadian films. The session was led by a professional facilitator and brought together the expertise and knowledge of executives from production, distribution, exhibition and broadcast, as well as Telefilm Canada, with the stated objectives of:

- Identifying opportunities for collective action, across stakeholder groups, to build audiences for Canadian films;
- Arriving at consensus on how public policy could be adapted to better serve the industry, and in meeting the audience objective; and
- Identifying responsibility and accountability for a film's success or failure from development through production to marketing and release.

In addition to the stated objectives, an unstated goal was to have participants engage in discussions about their business realities in committing to Canadian feature films and explain to the other industry sectors how these realities might differ from common industry perceptions.

Key recommendations arising out of the day's discussion, put forward by participants and acknowledged by Telefilm Canada's Executive Director, Wayne Clarkson, coupled with Exit Survey results point to the objectives of the Focus Group having largely been met.

### Discussion Themes and Assumptions

In order to ensure the discussion was as effective as possible Telefilm Canada presented two themes for discussion: Decision-Making and Risk and Reward, with a particular focus on the choice of films and corporate health. Participants were divided into five groups, with representation from each industry sector to discuss and explore these themes.

Telefilm Canada also provided participants with a list of basic assumptions, which have shaped the industry since the inception of the CFFF, as a common set of starting points that discussions could evolve from. These were:

- That many of the CFFF policies have proven to be ineffective support mechanisms for building audiences;
- That the Government of Canada's contribution to the CFFF will remain unchanged for 2006/07, but requests for new funding for 2007/08 will be made this year;
- That the primary audience objective going-forward will remain the theatrical box office objective, although TV and DVD will play an increasingly important role;
- That Canada's English and French language film markets are different and require unique box office targets and public policy support;
- That government intervention has an important role to play in stimulating and supporting the private sector in taking the additional risks required to reach audiences with Canadian films. The objectives of government, and associated policies and guidelines however, may be in conflict with private sector priorities;
- That various sources of public sector financing exist to support Canadian content productions. The at risk public funding made available through the CFFF is reserved first and foremost for those films that reflect the Canadian experience for Canadian audiences (i.e. that present distinctively Canadian stories, characters and settings); and
- That success internationally is a secondary objective to achieving audience success domestically.

Despite these assumptions, some of the recommendations put forward fall outside these parameters and may not, for regulatory, policy or other reasons, be directly addressed at this time. Others reflect private sector priorities that do not correspond, in whole or in part, with public policy objectives. These recommendations nevertheless provide an important context going forward and will help to shape the thinking around the development of new policies, programs and business practices.

It should also be noted that in advance of the Focus Group, participants were asked to fill out a brief confidential questionnaire (returned directly to the facilitator) providing their views on the issues facing the English Canadian feature film industry and on their expectations for the Focus Group.

In total, eighteen of the forty-one participants responded to the questionnaire. Without exception, all the topics identified as key issues facing the industry were discussed by participants during the Focus Group session.

#### Next Steps:

All recommendations made by the Focus Group are being brought forward to the Canada Feature Film Fund Working Group for further consideration. The CFFF Working Group will be convening for a first meeting in March/April.

As noted above, this Focus Group meeting was intended to be a first step in establishing a new dialogue within the industry. It will be followed by an industry meeting to discuss the creative process by which feature films are developed and produced in late spring and a marketing session in the fall, focusing on how to more effectively market and promote Canadian films in a marketplace heavily dominated by foreign films.

## **RESULTS OF DISCUSSION**

### **1. Theme One: Decision-Making**

Participants (through discussion at each table) were asked to consider the following two questions:

1. What factors do you (each sector) take into consideration when you decide to commit to a Canadian film? For example, in order of importance how would you rank the following:
  - Script; Director; Producer; Distributor; Cast; Marketability; Audience potential; Budget level; Potential to finance; Other?

In terms of bringing a film to audiences, who is responsible for what? Is this different from who should be responsible? For example, a producer may be interested in asking an exhibitor how they decide what films to exhibit, how broadly and for how long. An exhibitor may be interested in asking a producer why so many Canadian films are made that do so little business.

2. In making your decisions about which films to commit to, what CFFF policies do you find unnecessarily restrictive or limiting? What changes do you recommend to these policies? Which policies do you feel should remain as is? Are there any that you would recommend removing completely from the CFFF guidelines? Would you add any new ones? (See attached document "CFFF Policies Summary" as a guide).

For example, industry feedback suggests the following areas related to decision-making may be worth looking at:

- The value-added or timing of a distributor trigger for films budgeted at \$1 million or more;

- Opportunities to provide greater flexibility in financing 6/10 or 7/10 Canadian content productions without losing distinctively Canadian story, character and setting elements;
- Should Telefilm's investment cap increase with the level of distinctively Canadian content;
- The value of investment levels as a basis for a national versus regional decision-making process as opposed to others like budget size;
- Other?

## **Analysis of Report Backs (Theme One: Decision-Making)**

During the report back session participants raised a number of common factors related to how they made the decision to commit to a Canadian feature film, notably: the script and marketability.

Participants also offered several suggestions with respect to adapting policy to improve the audience potential of Canadian films. These suggestions included: reviewing the definition of Canadian content, introducing automatic, or market driven funding triggers for bigger budget films, increased funding to support continual talent development, and setting realistic box office targets.

### 1. Script

From the perspective of both the producers and distributors, having a good script was the most important factor in whether or not they chose to commit to a film.

- Most producers expressed the need to feel passionate about a script they are committing to, as they will be living with the project for the next three to five years. Moreover, as it is the producer who is responsible for selling the script to potential investors, their passion and conviction in the script is an important sales tool.
- From the distribution perspective, it was noted that if a script is good it will "attract a good director, which will attract good cast and the rest will fall into place."

### 2. Marketability

The marketability of a film was identified as a key decision-making criterion for both distributors and exhibitors.

- Some distributors suggested that the core idea of the film was a key factor in its marketability, stating that "a film has to (be able to) be described in five words or less in order for it to have any potential on a Friday night".
- Beyond the market potential of the story itself, reference was made to the importance of the whole package – the director, cast etc.
- One exhibitor indicated that the most important question in deciding to commit to films for him is why. "Why are they getting made? Why are they expected to be released?" If these questions cannot be answered satisfactorily it is likely the film will only play theatrically for one to two weeks.

### 3. Defining Canadian Content

The current definition of distinctively Canadian content (Canadian story, characters and setting) was challenged as was the Telefilm Canada policy requiring a film to achieve a minimum of 8/10 CAVCO points to be eligible for funding.

- There was agreement that the key criterion in determining whether a film is Canadian should be whether the Canadian producer has creative and financial control. There was disagreement as to whether this definition went far enough.
- There were differing views on whether the degree of “Canadianness” should influence the level of Telefilm funding available to a film.
  - “We are not trying to use Telefilm dollars for service productions, but we are trying to build a thriving, successful industry that would benefit everybody... Whether an uber Canadian movie should get more support than others, we’re saying not necessarily...”
  - “The more Canadian (a film) is the more percentage of money it (should) get.”
- There was consensus in favour of reducing CAVCO point requirements to 6/10, however some commented that either the writer or director must remain Canadian.

### 4. Automatic Funding Triggers

Broad support in favour of a more automatic funding system for big budget films, based on the level of genuine, or at risk, market support for a film was expressed.

- “The only way that constructive change can come about is if the marketplace forces rule... Only those who are genuinely at financial risk (distributors) can actually trigger a film (for Telefilm funding).”
- “Telefilm should automatically provide x dollars or a percentage of the budget based on a scale of Canadianess and international support – distributors, financiers and broadcasters.”

The discussion surrounding automatic funding triggers also raised comments on where the existing distributor trigger or market speaks mechanism, intended to guide Telefilm Canada in its decision-making during the past five years has failed:

- One distributor expressed the opinion that legislated pre-sales create expectations on the part of producers that distributors will invest that amount and more in their film rather than allowing the distributor to look at the actual value of the film in the marketplace.
- “Last year there were distributors that triggered 47 projects. How is that possible... There can’t be that many projects that are ready to go.”

### 5. Increased Funding

Alongside the desire for a more market oriented funding trigger for big budget productions was a wide recognition that significant funds should be set aside in support of lower budget films as a training/testing ground for emerging talent.

- “We believe that developing talent is most important and giving them the resources and not requiring them to hit certain financial measures is the way to do that.” This will require however “much more money”.
- There was also agreement that these films should be picked using much more subjective criteria by Telefilm Canada. One table suggested that the evaluation of lower budget films should be undertaken by either Telefilm Canada, the Canada Council or a peer jury.

## 6. Setting a Realistic Box Office Target

There was consensus that the existing box office target was artificial and a Government of Canada priority that did not correspond to the realities of the marketplace. There was also an acknowledgement that English Canadian films need to improve at the box office.

- A million dollars was regarded as too high a box office target. A comment was made that \$500,000 would be a more realistic target for Canadian and non-Canadian independent films.
- One table inferred that the measure of box office success for Canadian films should be against other independent films. “By definition Canadian films are indie-films.” No clear definition of what constitutes an independent film was arrived at however.
- “We should certainly improve our box office but let’s change the rhetoric about any film that doesn’t make a million dollars not being successful.”
- Although it was widely held that in general it is difficult to make a commercial film there was admittance that “the majority of the films that we make in Canada at present are for very limited audiences. We have not been able to figure out how to enhance the audience numbers we aspire for.”

## 7. Other

Additional areas that arose during the Theme One discussion included:

- Difficulty in getting Telefilm funds in a timely manner;
- The artificiality of Telefilm Canada’s development phases; and
- The need to looking for Canadian talent outside the traditional centres of Toronto, Vancouver and Montreal.

## **2. Theme Two: Risk and Reward**

Participants (through discussions at each table) were asked to consider the following three questions:

1. In what way are Canadian box office revenues an important contributor to your (each sector’s) bottom line? In what ways do existing business models and/or corporate objectives fit with the federal government objective of reaching audiences?
2. Performance envelopes were intended both to reward companies for an initial success at the box office and to promote the continued success of Canadian

films, by providing guaranteed financing to films from these same companies. In principle, are performance envelopes a worthy public policy mechanism for encouraging the production of Canadian films with audience potential? If yes, what recommendations can you make for improving the current system? If no, can you suggest another reward or incentive mechanism?

3. How do public policy mechanisms encourage or discourage you to include Canadian films as a component of your corporate business plan? (See attached document “CFFF Policies Summary” as a guide). In your opinion, are there additional risks that you or other industry players could be taking that would benefit Canadian films? What are they? What incentives could be provided to encourage you to take these additional risks?

For example, industry feedback suggests the following additional areas related to risk and reward may be worth looking at:

- How can the producer fees and corporate overhead policy be adjusted to encourage producers to be more involved with the success of their films at the Canadian box office?
- How can Telefilm’s recoupment policy be adjusted to provide more of an incentive for domestic box office success?
- If Telefilm relaxed its requirement that the federal tax credit be included in the financial structure what suggestions do you have for filling the financial gap?
- How to consider “bang for the buck” in evaluating success?
- Others?

### **Analysis of Table Report Backs (Theme Two: Decision-Making)**

During the report back session participants indicated the importance of the box office results of Canadian films towards their bottom line relative to revenues earned from ancillary sales and theatrical revenues generated by non-Canadian films.

Participants also offered several suggestions on how existing Telefilm Canada policies designed to reward performance – namely performance envelopes and recoupment – could be adapted to better compensate producers and distributors.

One group of participants took the opportunity to elaborate on the Theme One suggestion of moving towards automatic funding triggers to present an alternative funding model to the current system, including the elimination of performance envelopes.

#### **1. Box Office Results of Canadian Films**

From the perspective of producers, exhibitors and distributors operating in the English language Canadian market there was agreement that the box office results of Canadian films did not contribute significantly to their bottom line. For one distributor with significant operations in the French language market Canadian box office results were viewed as important to the bottom line.

- Many Canadian distributors and producers indicated that they cared about and felt a sense of pride in, the theatrical release of a Canadian film but acknowledged that they returned little revenue or profit.
- Distributors in particular noted that Canadian films are a small part of their overall business model and are a small percentage of their profit. It was suggested that increasing marketing expenditures over a certain level to earn more box office revenue could in fact diminish a distributor's bottom line given the fixed nature of television revenues.
- Where performance at the box office was acknowledged as being important towards the bottom line was with respect to a production company earning a performance envelope. "For producer's (box office) is very important because... it's a measure for reward. That reward is critical to their on-going ability to produce."
- Exhibitors stated that their business is completely tied to box office and they do not distinguish between box office revenues for Canadian and non-Canadian films. For exhibitors the customer "vote is the box office and if a film is (performing) they will keep it in theatres." One exhibitor noted that overall, concessions contribute the lions share - 55% of revenues and 125% of profit.

## 2. Performance Envelopes

There was strong support for the continued existence of a reward for performance but some concern was expressed regarding the percentage of funds currently allocated to performance envelopes as well as a sense that the current criteria for calculating performance envelopes and for use of performance envelopes is flawed.

- Given the limited production funds available it was suggested that there should be a cap on the percentage of dollars flowing to performance envelopes to encourage the development of new talent.
- In an environment of limited resources, concern was also raised about awarding performance envelopes to films made outside the CFFF. The producer of "Resident Evil (II)... getting money from Telefilm to deploy into Resident Evil (III) is probably not what was intended."
- Support was expressed in favour of broadening the criteria used to calculate performance envelopes. Suggestions included: DVD sales and rentals, television audience numbers and international sales and box office.
- In addition to broadening the criteria, interest in including a "bang for the buck" element was also expressed. Several suggestions of what this might look like were put forward, including: (Telefilm) investment vs box office, total budget vs box office or P&A spend vs box office.
- A strong desire for greater flexibility in the use of envelope funds was expressed, with particular emphasis on the ability to bank envelope amounts over a period of years.

## 3. Recoupment

Various opinions were expressed as to how Telefilm Canada's recoupment policy could be modified to provide greater opportunity for producers to recoup.



- The opinion was expressed that “Telefilm should probably take a back seat at this point and offer incentives to producers.” Different options for what those incentives might be were offered:
  - The adoption of the model currently in place for French-language productions for English-language productions (i.e. 50% of revenues in first tier flow to the producer until full recoupment of the provincial tax credit)
  - Offering producers revenue from gross box office receipts once a certain box office target had been met.

#### 4. Alternative Funding Model

As a follow-up to the recommendation brought forward in Theme One regarding the implementation of two separate funding streams – an automatic funding trigger for big budget films and a more subjective, non-market driven stream for low budget films, one group of participants presented a more fully fleshed out model.

##### *Automatic Funding Trigger (“Canada Large”)*

- A \$20M fund to be allocated towards development and production based on the level of distributor interest in a film.
- At the production stage, any film with a minimum at risk distributor investment would automatically receive financing from Telefilm.
- Performance envelopes could then be eliminated. “Your reward is having the best idea. You get distributors to hold hands with you (producers) and take the risk.”
- With such a high level of distributor risk required to trigger CFFF funding, there was an acknowledgement that this could lead to very few films being triggered.
  - Note: For this model to succeed Telefilm Canada would require the flexibility to carry CFFF funds over from one year to the next. This type of funding flexibility is not currently available.

Note:

- This model was proposed as a 2 to 3 year pilot project.
- Some concern was raised that this model would unfairly favour vertically integrated production and distribution companies.
- The definition of what constitutes at risk distributor investment needs to be determined.

##### *Low Budget (“Canada Light”)*

- “Projects under some amount of money, like a million and a half. These would be totally, completely subjective, financed through the system, no distributor requirements...”

#### • 5. Other

Other areas of interest during the afternoon report-backs included:

- A recommendation that the requirement that federal tax credits be included in the financing structure be removed; and
- Having the industry conduct a post-mortem on Telefilm’s investment in both production and investment.

### **3. Business Realities of Each Sector**

In addition to discussions about recommendations for changes to existing policies related to decision-making and risk and reward, participants also took time throughout the day to openly question and discuss each other's business realities.

Differences on how each sector decides to commit to a feature film are captured above in the analysis of the report backs on Theme One, however during Theme Two time was spent by several groups exploring how various sectors define their level of risk in a Canadian feature film.

- It was suggested that producers take little to no risk in a feature film because they use third party investor financing to cover the cost.
- Producers explained that it takes years to develop and raise the financing required to produce a project. In theory they are compensated through producer fees and corporate overhead allowances and tax credits. In reality it was noted that producers are often required to defer 10% to 50% of their fees as well as invest tax credits in the production.
- Distributors noted that they operate in a very high fixed cost business, which makes them risk averse. By its very nature, their business makes it unlikely that they will take greater risk than what they currently take.
- The example was raised that although broadcasters can make equity investments in feature films they are ultimately accountable to their shareholders. When one broadcaster invested in a feature film "they got punished by Bay Street... so taking production risk is much more costly than simply the cost of production."
- Some exhibitors expressed surprise at the vagueness of the business models of the other sectors in comparison to their own.

### **4. The Audience Objective**

With the objective of the Focus Group being to address the issues and challenges facing the English Canadian feature film industry that have contributed to a limited theatrical market share, Telefilm Canada took the opportunity to make a brief presentation on market share during the lunch break. The goal of the presentation was to illustrate what a 1% increase in market share for English Canadian feature films was equivalent to, in terms of total box office receipts as well as average box office per CFFF financed film.

- Total English-language box office in Canada in 2005 was \$700,000,000
- This means that each 1% increase in market share is equivalent to \$7,000,000 in box office
- It is estimated that at 2005/06 levels of CFFF production resources (performance and selective) in support of English-language feature films (\$31M), Telefilm Canada will be able to support an average of 14 films per year, based on a traditional average investment of \$2.12M per film.

Market Share	Average Box Office of CFFF Films (14 films)
5%	\$2.5M
4%	\$2M
3%	\$1.5M
2.5%	\$1.25M
2%	\$1M
1%	\$500,000

The current average box office of English-language CFFF films (PER&SEL) is **\$435,000**

## GOING FORWARD

### 1. Wayne Clarkson’s “Take Aways”

In closing, Wayne Clarkson expressed gratitude to participants for committing their time and energy to the Focus Group. He acknowledged that he had been apprehensive that the Focus Group might not work, “that there wouldn’t be willingness (for) disparate parts of the industry to sit down at five different tables and ... constructively and productively debate and discuss (the issues). He noted that he was exceedingly impressed with the ideas brought forward and shared his five “take aways” from the day’s discussions:

1. **More Money:** It was made clear throughout the day that increased funding in support of English-language Canadian films is needed if we are going to increase box office results. Going forward, it is incumbent upon Telefilm Canada and the industry to establish a reasonable box office target, and viable strategies for reaching this target, that will justify the desired funding increase to the Department of Canadian Heritage and the Government of Canada.
2. **Automatic Trigger:** A strong expression of support in favour of a more market driven funding model was expressed. The model proposed represents a significant change to the current funding process for bigger budget films, placing control of public funds within the hands of the industry. Telefilm Canada strongly supports the principle of a market voice in funding decisions and looks forward to exploring this idea more fully in the context of the CFFF Working Group. The Focus Group quite rightly cautioned that this model is predicated on Telefilm Canada being able to carry funds over from one year to the next. It should be noted that it is outside of Telefilm Canada’s control to implement this change.
3. **Selective Fund:** In addition to increasing audiences for Canadian films, the industry also recognized the need for on-going training opportunities for emerging Canadian talent in the form of a low budget film fund. It was suggested that this fund should be more subjective in its decision-making with little to no box office expectation.
4. **Scripts:** The need for better scripts as the route to better films was universally acknowledged. Telefilm Canada is in agreement and will be hosting a Creative Summit in early summer to review the creative process by which Canadian feature films are developed and produced.

5. **Flexibility in Canadian Content:** Support for a reduction in the number of CAVCO points needed to access Telefilm Canada funding was commonly expressed. Telefilm Canada will use the CFFF Working Group as a forum to explore what checks and balances should be put in place to ensure a reduction in Canadian content points does not erode on-screen distinctively Canadian elements.

## 2. Additional “Take-Aways” from Participants

In addition to Wayne Clarkson’s take-aways, focus group participants also highlighted the following ideas as key recommendations they believed would help English Canadian feature films to better reach audiences going forward:

- Taking talent on the road and across the country to promote the theatrical release of a Canadian film;
- Developing a producer/distributor working relationship or partnership regarding development funds, where the decision-making power would rest in the hands of distributors (similar to a U.S. studio style);
- Clearly defining what is meant by a Canadian film;
- Allowing Telefilm Canada to carry funds over from one year to the next.

## 3. Evaluation Results

### Evaluation Results (27 of 41 participants responded)

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Don't Know	NA (Observer)
a. The purpose of today's meeting was met.	3	22	2	0	0	0	0
b. I was provided with sufficient information in advance of the focus group to come prepared	6	11	4	3	2	1	0
c. Decision-Making, as a theme, provided an opportunity to explore key issues facing the English-language Canadian feature film industry.	7	18	1	0	0	1	0
d. Risk and Reward, as a theme, provided an opportunity to explore key issues facing the English-language Canadian feature film industry.	5	19	3	0	0	0	0
e. I was provided with sufficient opportunity to express my views on the discussion questions.	8	13	3	1	0	1	1
f. I was provided with a good understanding of the views of other stakeholders.	7	20	0	0	0	0	0

**Do you have any further comments about today's focus group, or about Canada's English-language feature film industry?**

- Telefilm should follow up quickly and keep us updated
- Lots of intellect in the room, yet much of the thinking was "fuzzy"
- A very good start for continuing dialogue
- Smaller groups, fewer people is a very good thing
- Other stakeholders should be present i.e. more broadcasters / cable funds
- Still a huge gap between (the) exhibitor and production "world views"
- Should not have booked during Sundance Film Festival and more lead time for questionnaire would have been better; but overall good
- This is a good start for industry consultation
- The focus group was effective because the stakeholders were in attendance without Guilds and Unions present
- Group was small enough to be productive
- Would have been better to switch tables after lunch
- It's time for radical change and allowing the market place to drive
- Great first step
- Reality checks are good; that's what this was. Consultations are important, this was that too

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(See appendix below for participant list)

## Appendix

### Participant List

Sector	Name	Title	Organization
<b>Distribution Sector</b>	Bryan Gliserman	President	Odeon Films
	Michael Mosca	Senior Vice-President & COO	Equinoxe Films
	Christian Larouche	President	Christal Films
	Laurie May	Co-President	Maple Pictures
	Hussain Amarshi	President	Mongrel Media
	Jeff Sackman	President & CEO	ThinkFilm
	John Fulton	Executive Director & Vice-President of Distribution	TVA Films
	David Reckziegel	Co-President	Seville Pictures
<b>Exhibition Sector</b>	Michael Kennedy	Executive Vice-President, Programming	Cineplex Galaxy
	Stuart Fraser	President	Empire Theatres
	Rob Wales	VP of Film Programming	Empire Theatres
	Neil Campbell	CEO	Landmark Cinemas
	Leonard Schein	President	Festival Cinemas
<b>Production Sector</b>	Paul Pope	Producer	Pope Productions
	Kevin Tierney	Producer	Park Ex Pictures
	Robert Lantos	Producer	Serendipity Point Films
	Sandra Cunningham	Producer	Strada Films
	Julia Sereny	Producer	Sienna Films
	Stephen Heyges	Producer	Brightlight Pictures
	Nicholas Tabarrok	Producer	Darius Films
	Shirley Vercreyusse	Producer	Burns Films
	David Hamilton	Producer	David Hamilton Productions
	Steve Hoban	Producer	Copper Heart Entertainment
<b>Broadcast Sector</b>	Marcela Kadanka	Senior Director, English Television A&E	CBC
	Paul Gratton	Vice-President, Entertainment and Speciality Channels	Chum/City
<b>Industry Observers</b>	Ted East	Executive Director	CAFDE
	Adina Lebo	Executive Director	MPTAC
	Marc Séguin	Vice-President Feature Film & New Technology	CFTPA
	Claire Samson	President & CEO	APFTQ
	Nick Ketchum	Director, English-language Radio and Television Policy	CRTC
	Jean-Pierre Gauthier	Director, Film Policy	DCH
<b>Telefilm Canada</b>	S. Wayne Clarkson	Executive Director	Telefilm Canada
	Elizabeth Friesen	Chief Operating Officer	Telefilm Canada
	Karen Franklin	Director, English Operations	Telefilm Canada
	Ralph Holt	Feature Film Sector Head	Telefilm Canada
	John Dippong	FF Unit Director, Western Regiona	Telefilm Canada
	Dan Lyon	FF Unit Director, Ontario and Nunavut	Telefilm Canada
	Melanie Hartley	FF Deputy Director, Quebec	Telefilm Canada
	Karen Pare	FF Unit Director, Atlantic Region	Telefilm Canada
	Maria DeRosa	Director, Corporate Affairs	Telefilm Canada
	Jacqueline MacDonald	Senior Policy Advisor, Feature Film	Telefilm Canada

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