

Telefilm Export Sales Study

Conducted by:



April 2006

Methodology

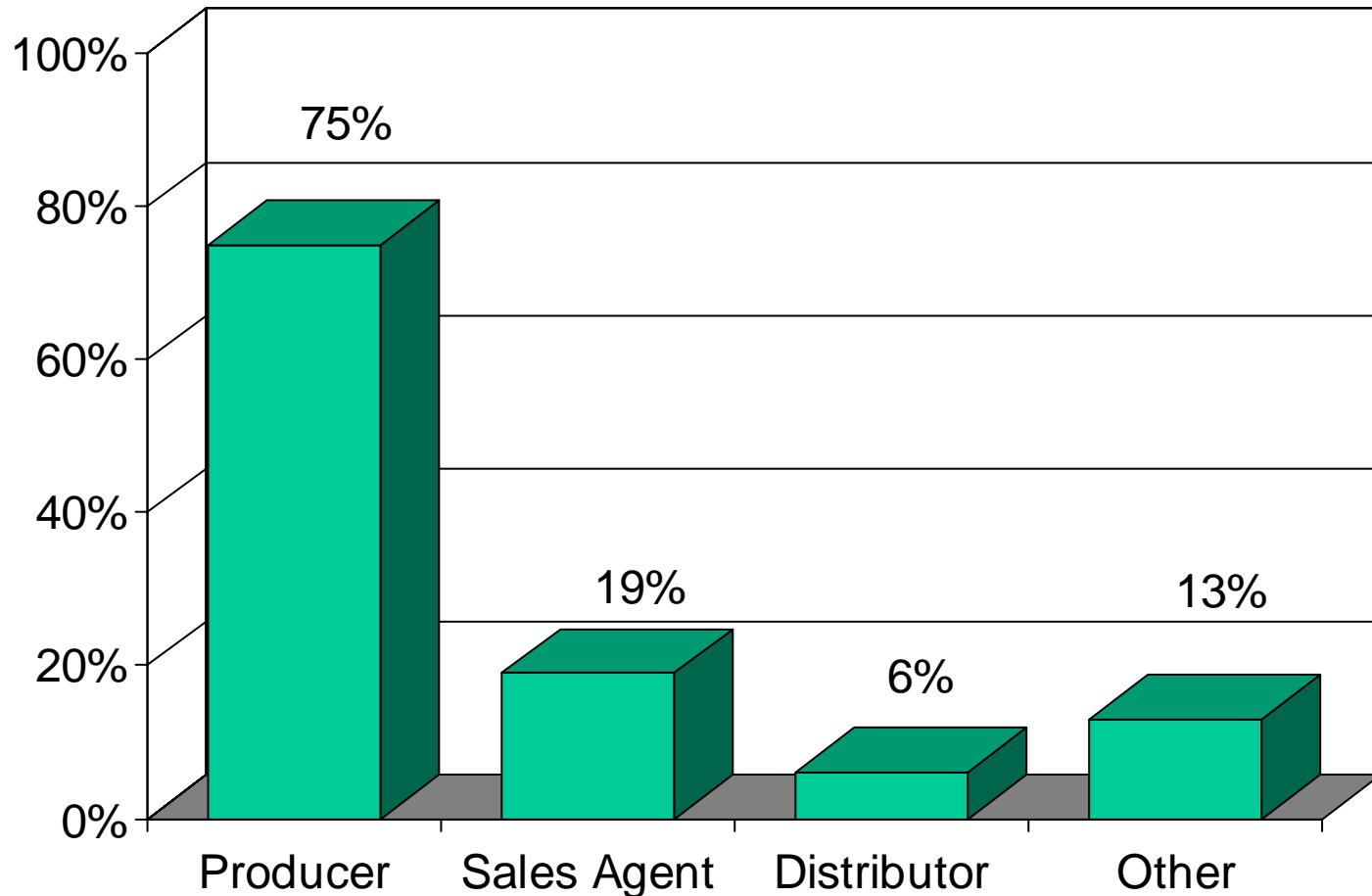
- **A total of 41 e-mailed invitations were sent to Canadian participants of the 2006 European Film Market (EFM) in Berlin.**
- **21 companies visited the survey website and, of these, 13 completed all sections of the questionnaire.**



Respondent Profile

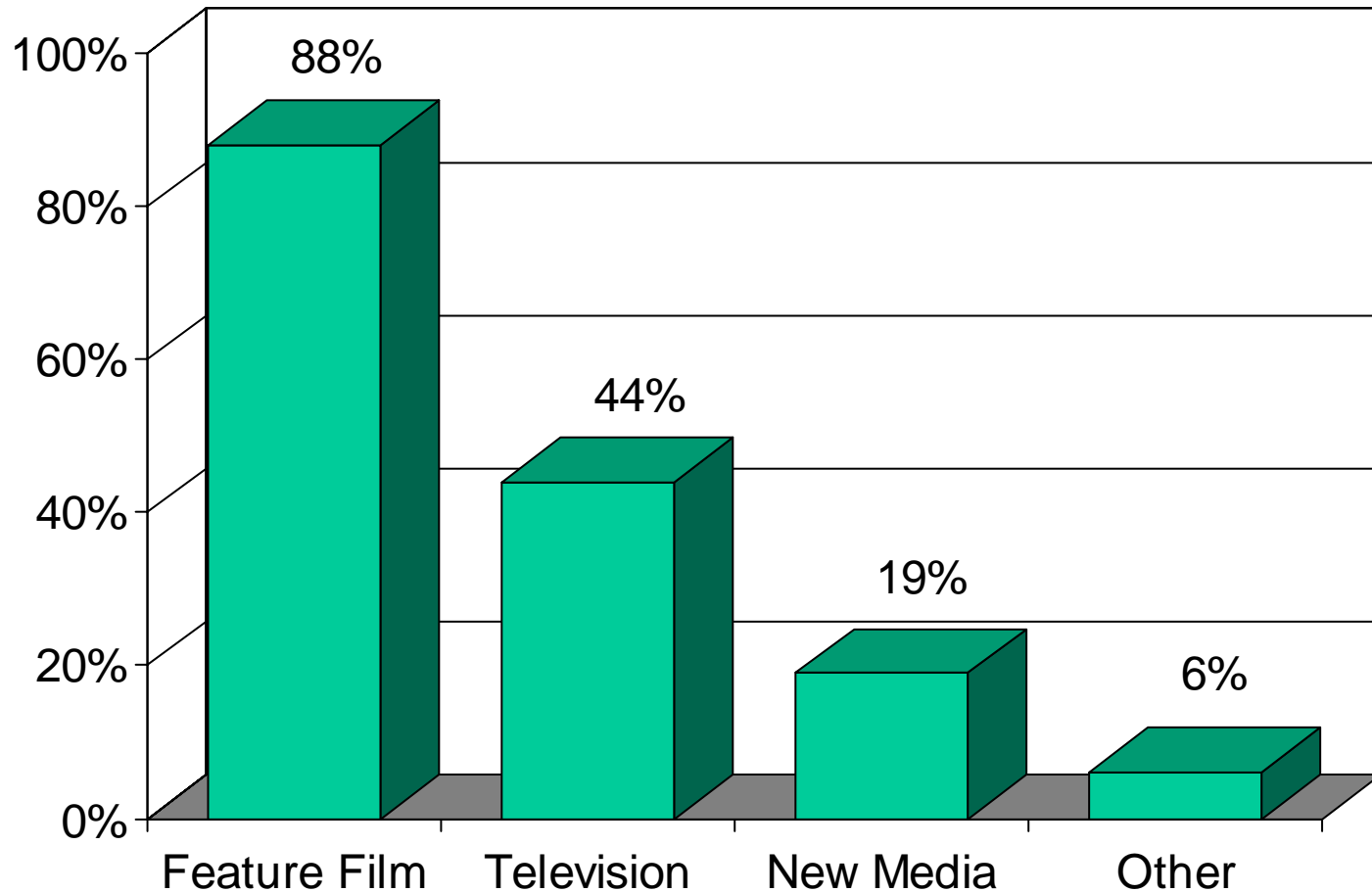


Primary Business Focus of Company



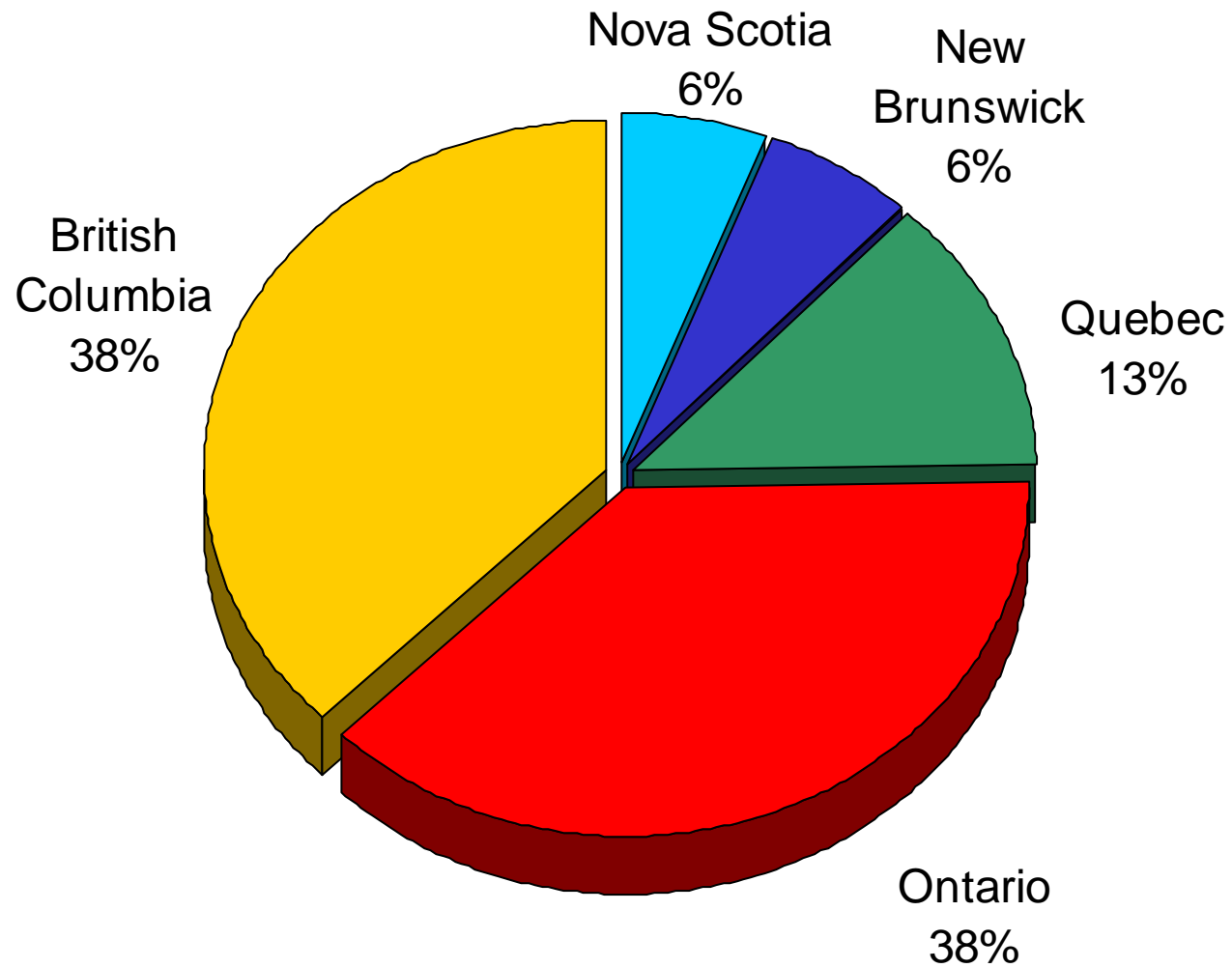
Q1. What is the primary business focus of your company? *Select all that apply.*
N=16

Main Format(s) of Interest



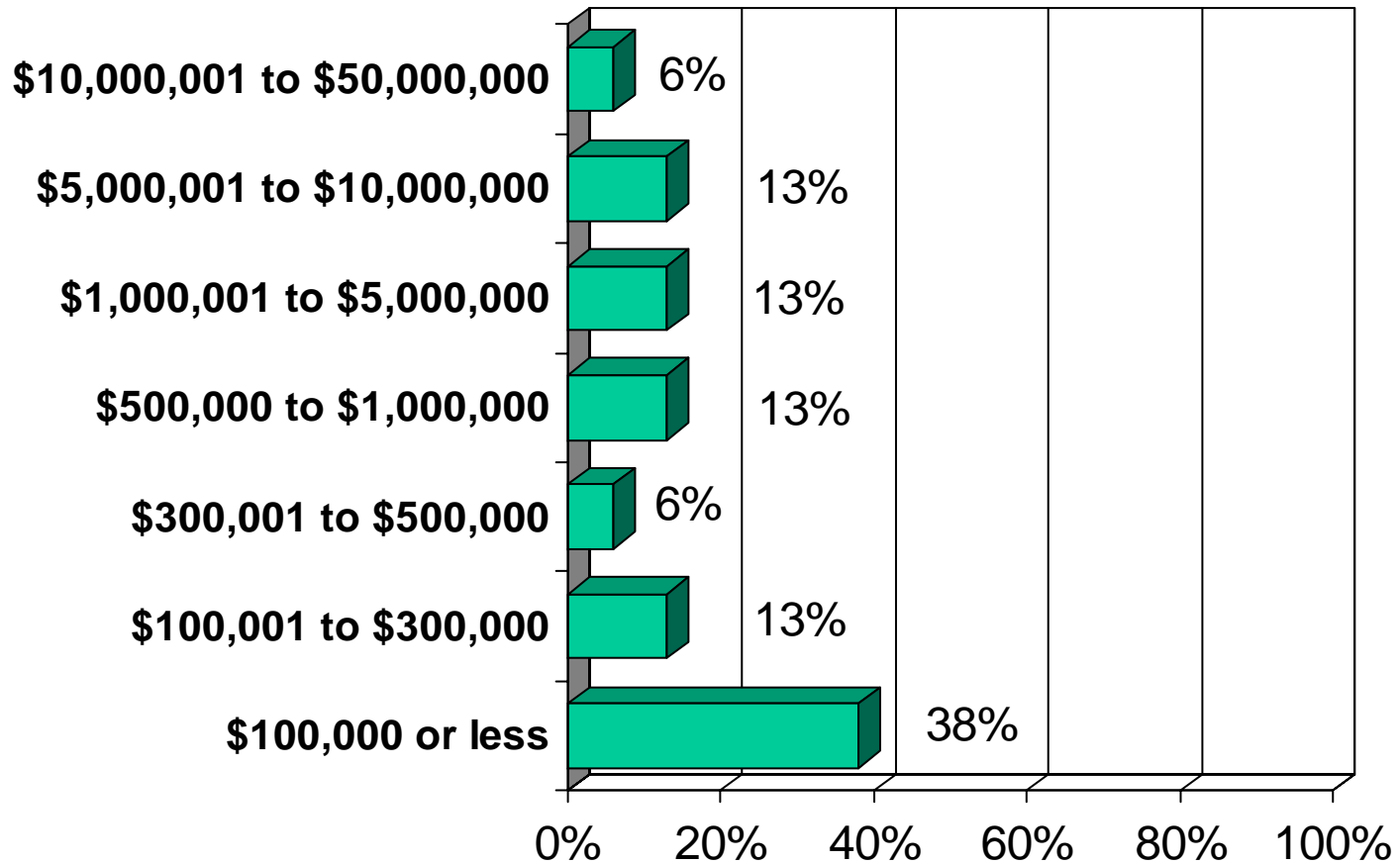
Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=16

Location of Head Office



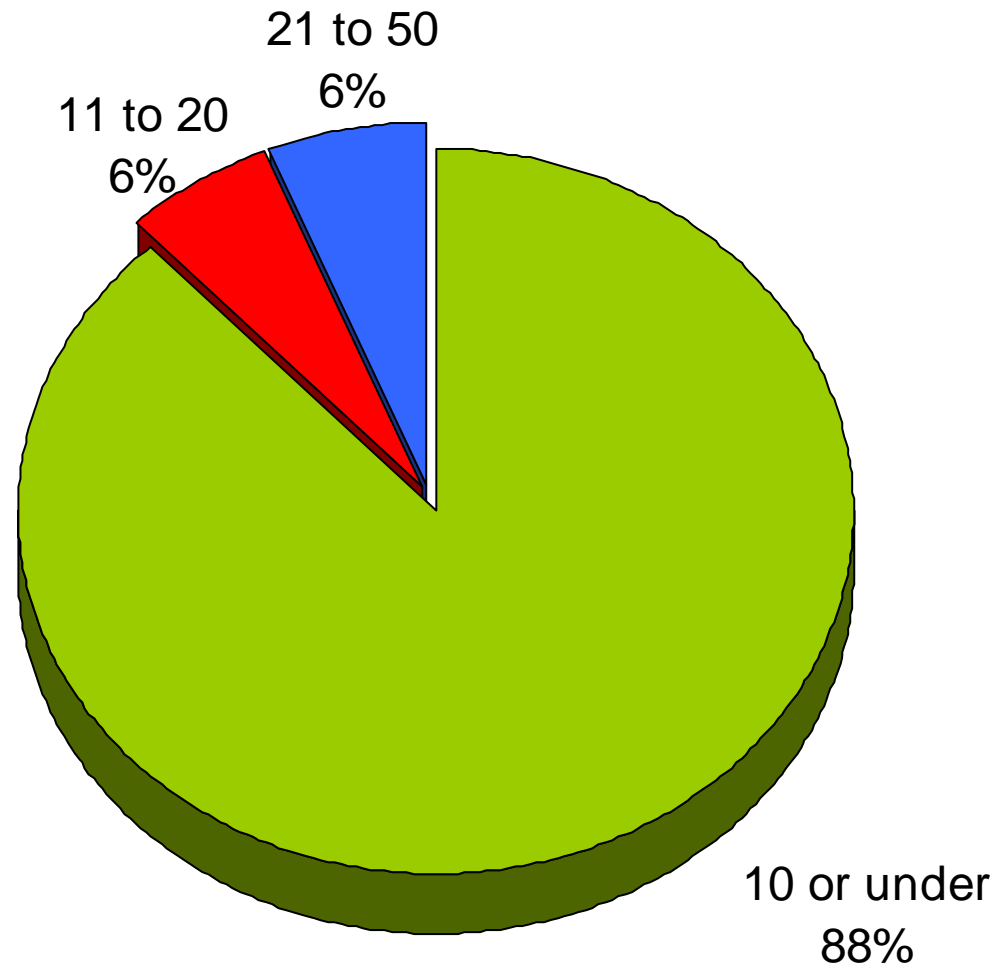
Q3. In which province/territory is your head office located?.
N=16

Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?.
N=16

Number of Employees



Q5. How many full-time employees are there currently in your company?
N=16

The Film Market



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

	Feature Film	Television	New Media
Animation	0%	6%	0%
Action/Adventure	31%	6%	0%
Comedy	44%	0%	6%
Documentary/educational	31%	25%	0%
Drama	81%	13%	0%
Erotica	6%	0%	0%
Horror/Thriller	31%	13%	6%
Performing Arts	0%	6%	0%
Romantic	19%	0%	6%
Science Fiction	25%	6%	0%
Art House	6%	0%	0%

Q6. In deciding to attend the 2006 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=16

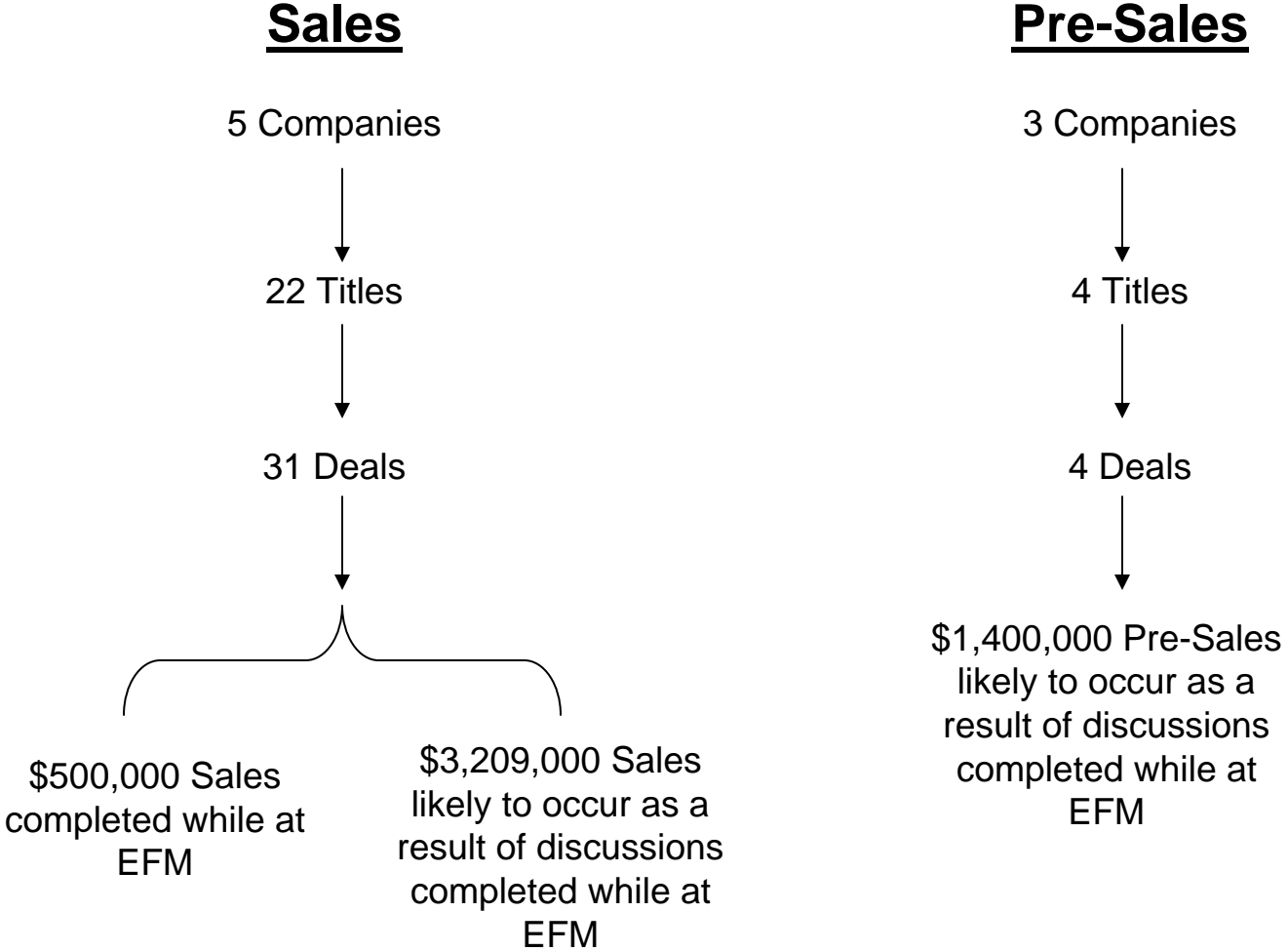


Sales/Pre-Sales

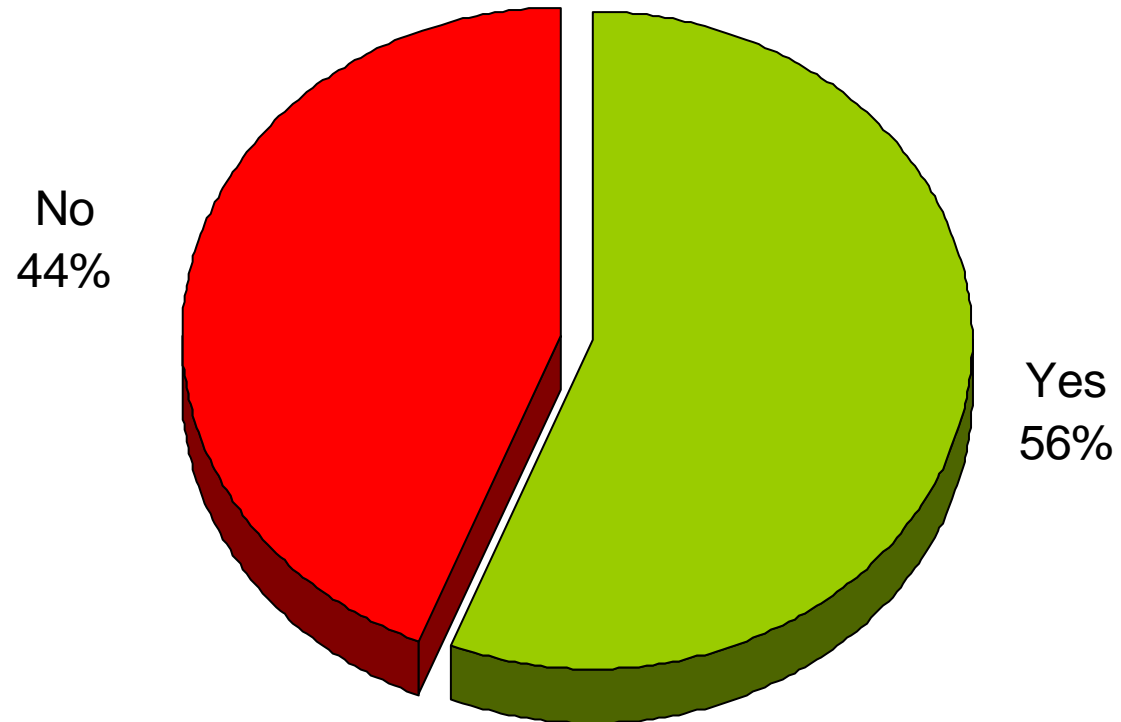
- 7 companies provided information on 35 deals involving 26 titles.
- Companies reported that 20 distribution agreements were signed.
- Companies reported that \$500,000 of sales were completed while at EFM 2006 and that \$3,209,000 worth of sales are likely to occur as a result of discussions initiated at EFM.
- Companies also report that they expect \$1,400,000 of pre-sales to occur as a result of discussions initiated at EFM.



Breakdown of Sales and Pre-Sales Deals



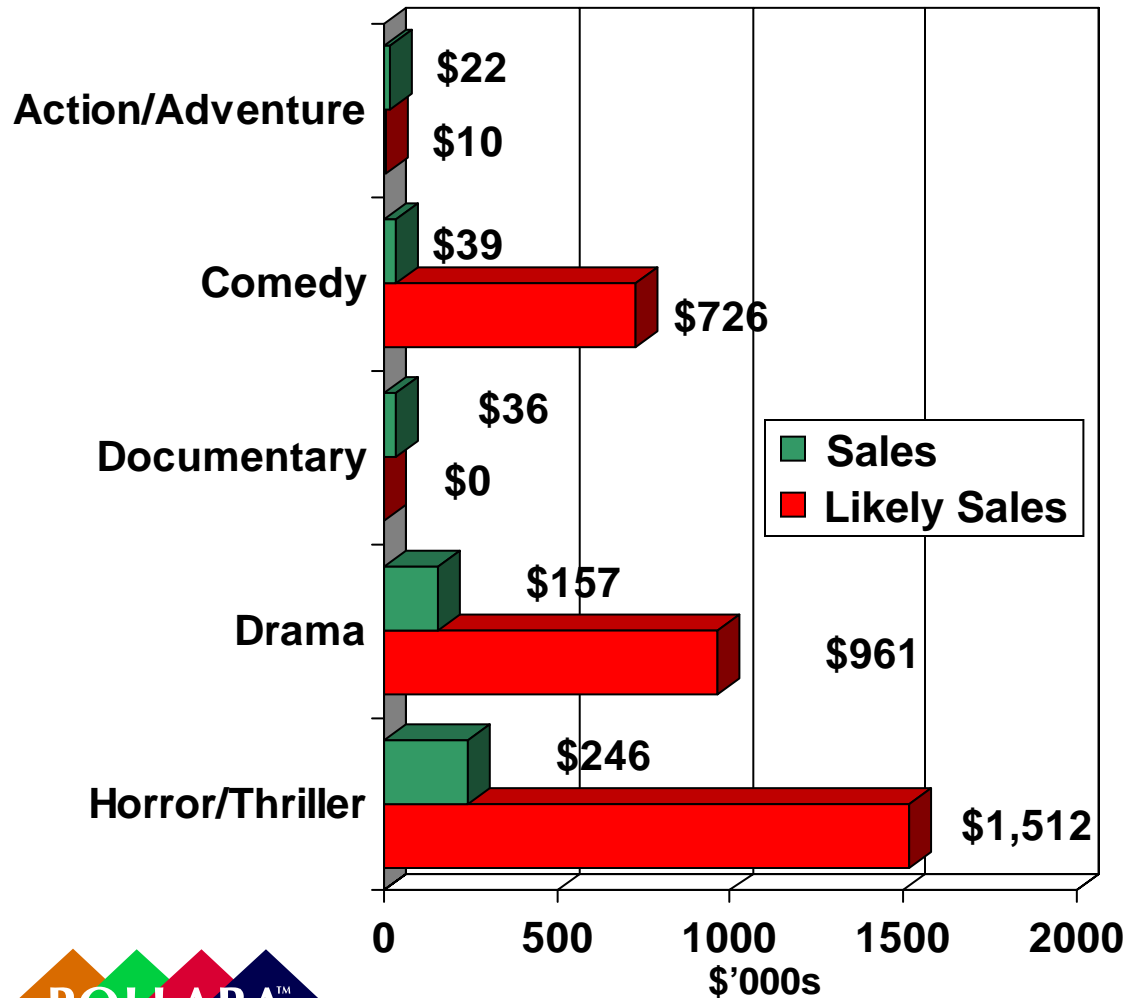
Sales



Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at the 2006 European Film Market (EFM)?

N=16

Breakdown of Sales by Genre*

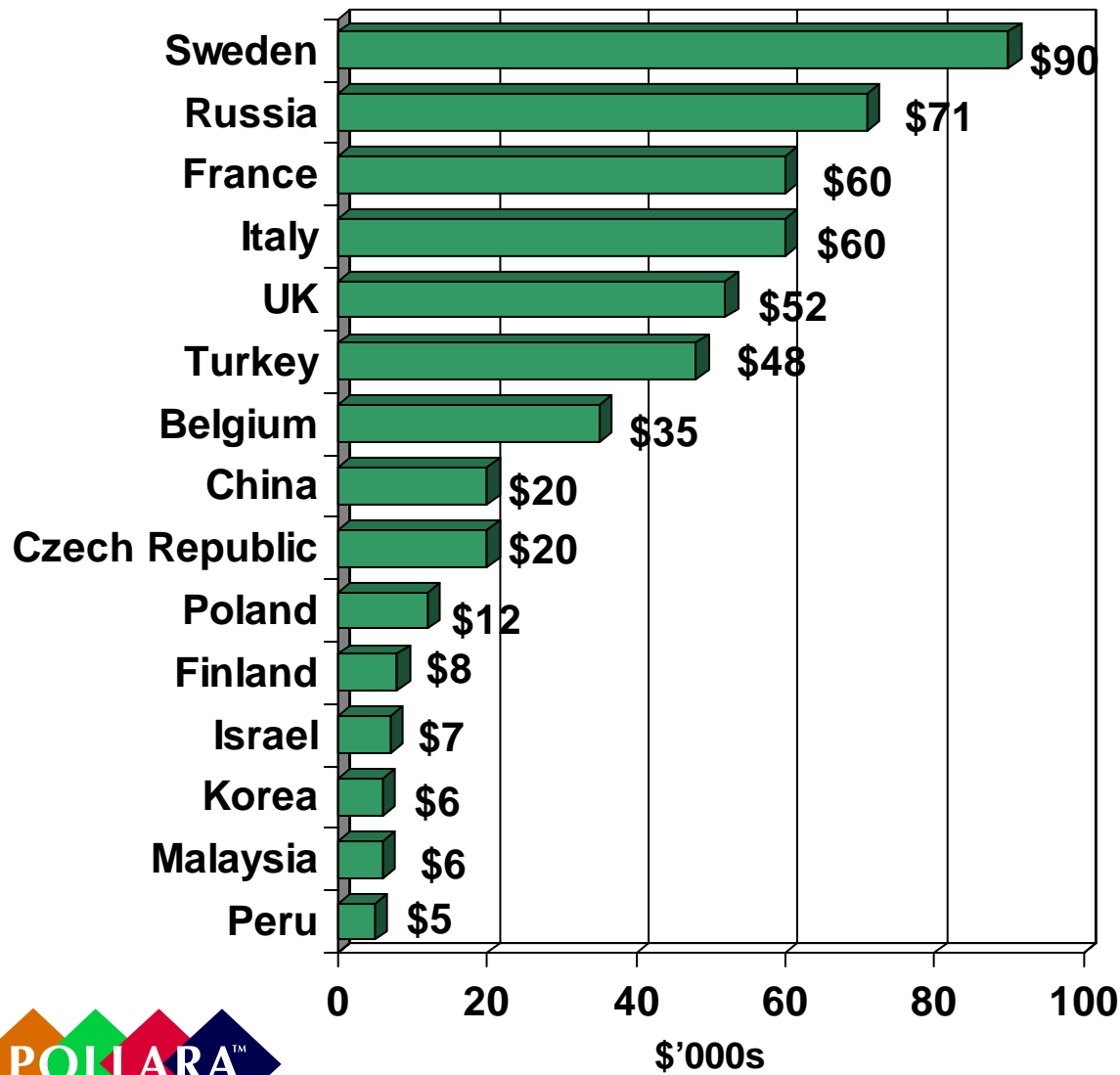


Companies	Titles	Deals
1	2	3
2	5	5
1	2	2
4	4	7
3	9	14



*All sales were of feature films

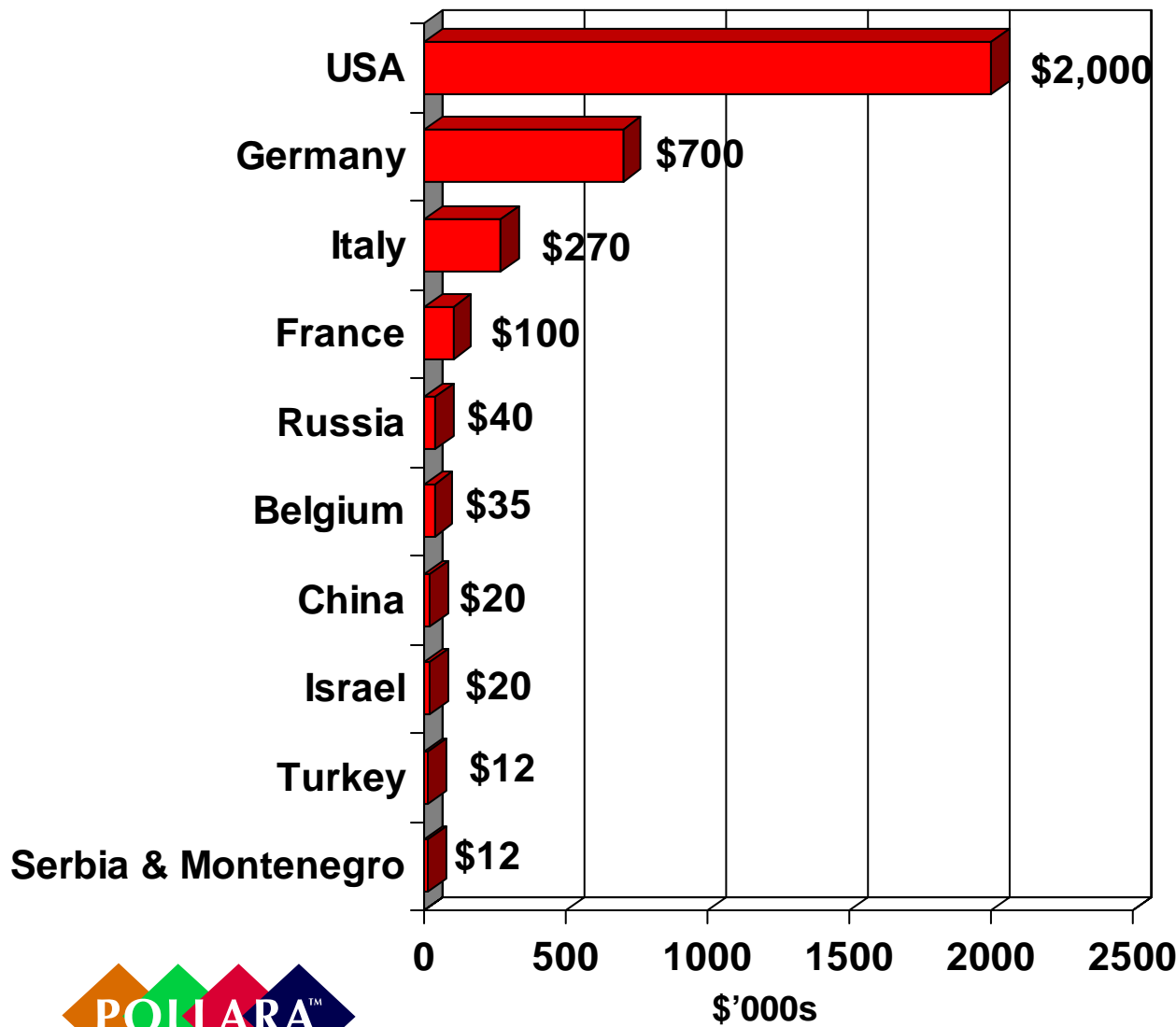
Breakdown of Sales by Country



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



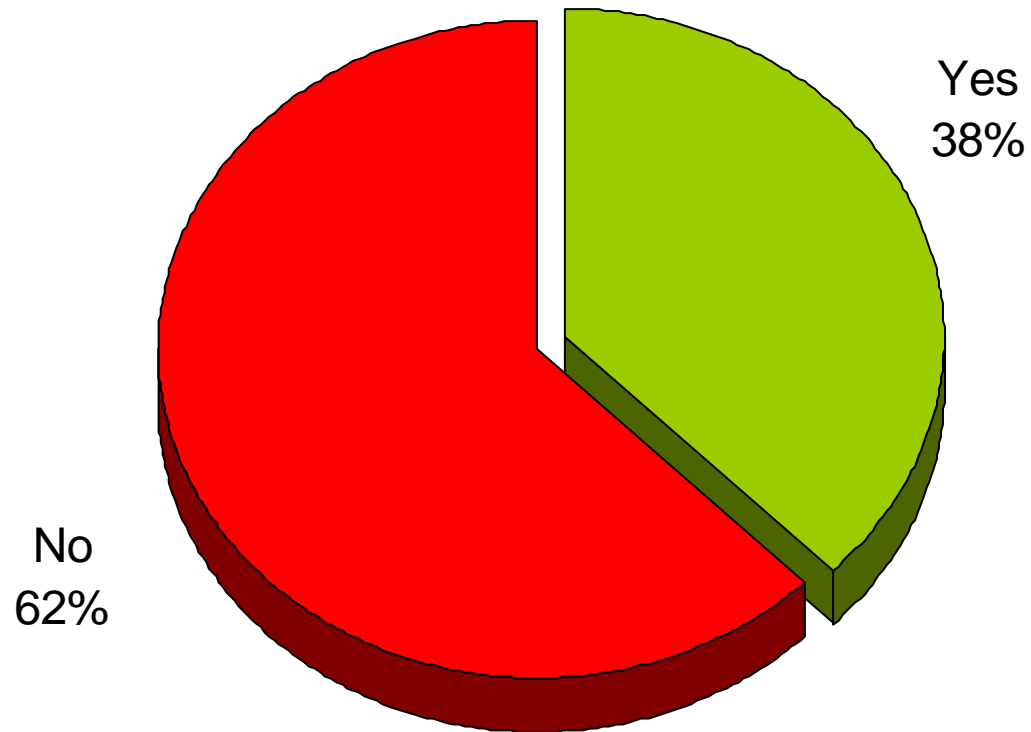
Breakdown of Likely Sales by Country



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



Pre-Sales



Q8e. Did you complete any pre-sales or begin discussions that will likely lead to pre-sales while at EFM 2006?

N=16

Breakdown of Likely Pre-Sales

<u>Deal</u>	<u>Media</u>	<u>Genre</u>	<u>Country</u>	<u>Value of Pre-Sales Likely to Occur</u>
1	Feature Film	Drama	United States	\$800,000
2	Feature Film	Drama	United Kingdom	\$300,000
3	Feature Film	Comedy	United Kingdom	\$200,000
4	Feature Film	Drama	Germany	\$100,000
			TOTAL	\$1,400,000



Co-Production and Co-Venture Deals

- 5 companies (31% of those who responded to the survey) indicated that they either signed, or began negotiating co-production or co-venture deals while at the 2006 EFM.
- In total, 12 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 2006 EFM.
- These deals are reported to be worth \$10,525,000.
- Respondents reported that they participated in an average of 26 business meetings each while at the 2006 EFM.



Co-Production and Co-Venture Deals

Respondent	Q9b - Number of co-production or co-venture deals	Q9c - Estimated Value of deals to company	Q9d - Countries involved
1	2	\$1,000,000	Japan
2	3	\$250,000	Germany
3	1	\$3,000,000	Germany
4	1	\$275,000	UK
5	4	\$6,000,000	France, Germany, UK
Total	12	\$10,525,000	

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 the 2006 European Film Market?

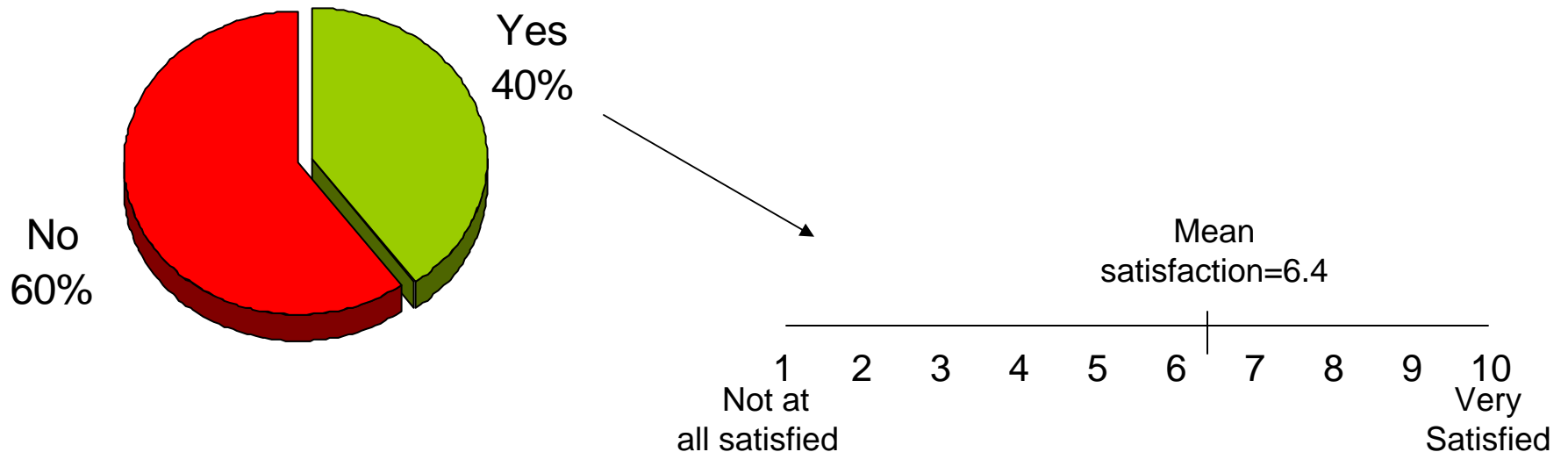
Q9c. What is the estimated value to your company of these co-productions or co-venture deals (in Canadian Dollars)

Q9d. With which countries are these co-production or co-venture deals?



Title Screening

- 40% of respondents indicated that they had a title screened at the 2006 European Film Market.
- They gave an average satisfaction score of 6.4 for the visibility their titles received from the screenings

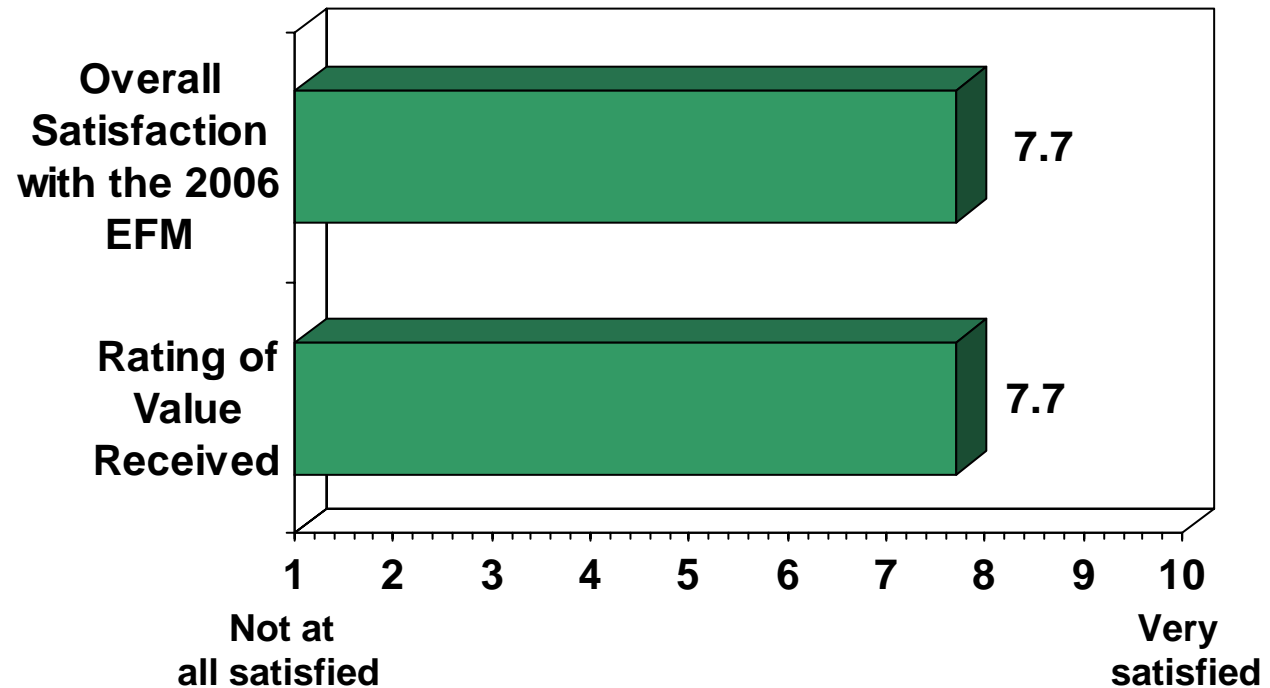


Q11. Were any of your titles screened at the 2006 European Film Market

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?



Overall Satisfaction With and Value of 2006 EFM



Q13a. How satisfied would you say you were overall with the 2006 European Film Market 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 the European Film Market 2006, how would you rate the VALUE you received on the same 1-10 scale...



N=14

Satisfaction with the 2006 EFM

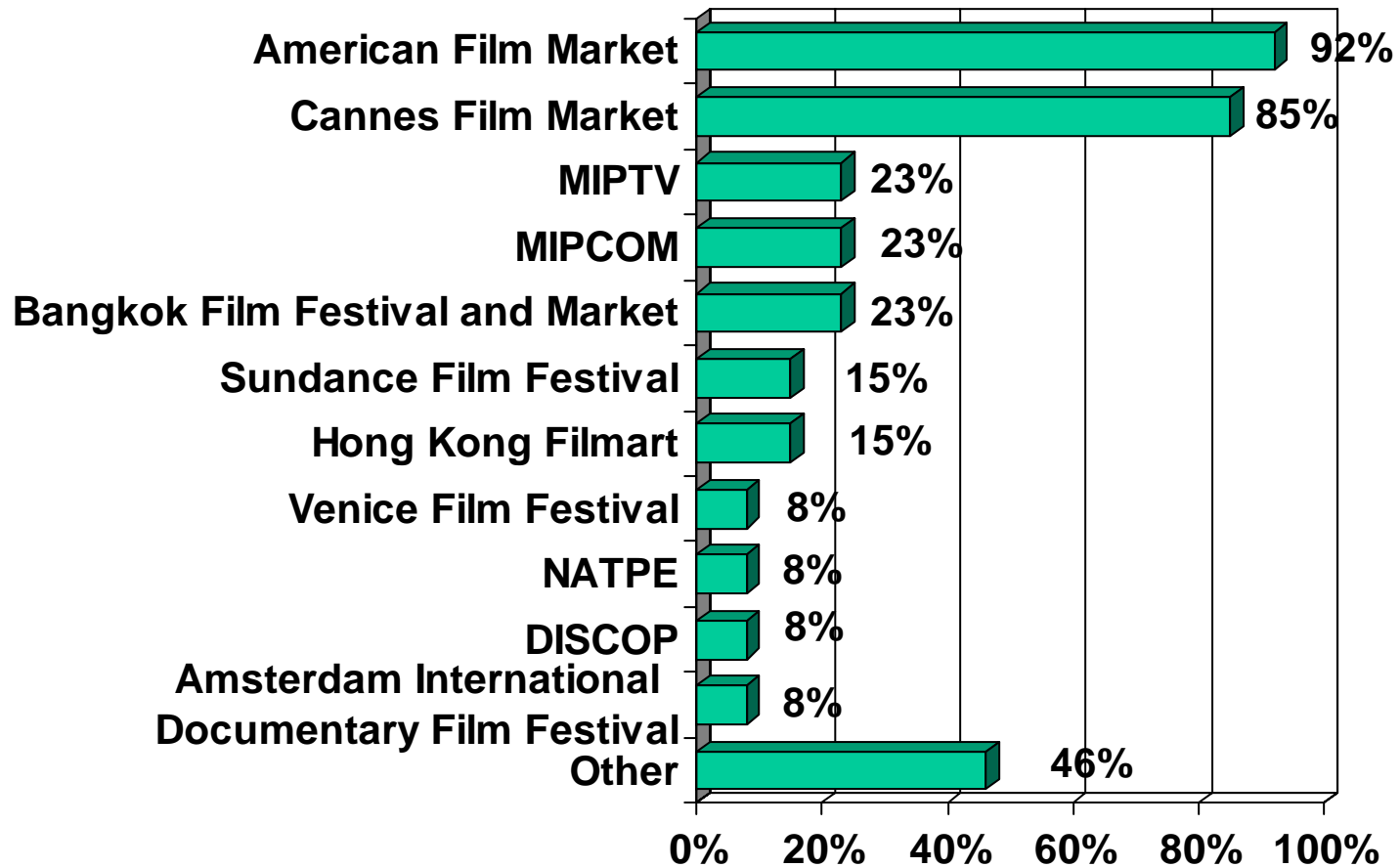


Q13c. How satisfied were you with the 2006 European Film Market in terms of meeting the following objectives for attending, using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. If a particular item does not apply, select, "not applicable".



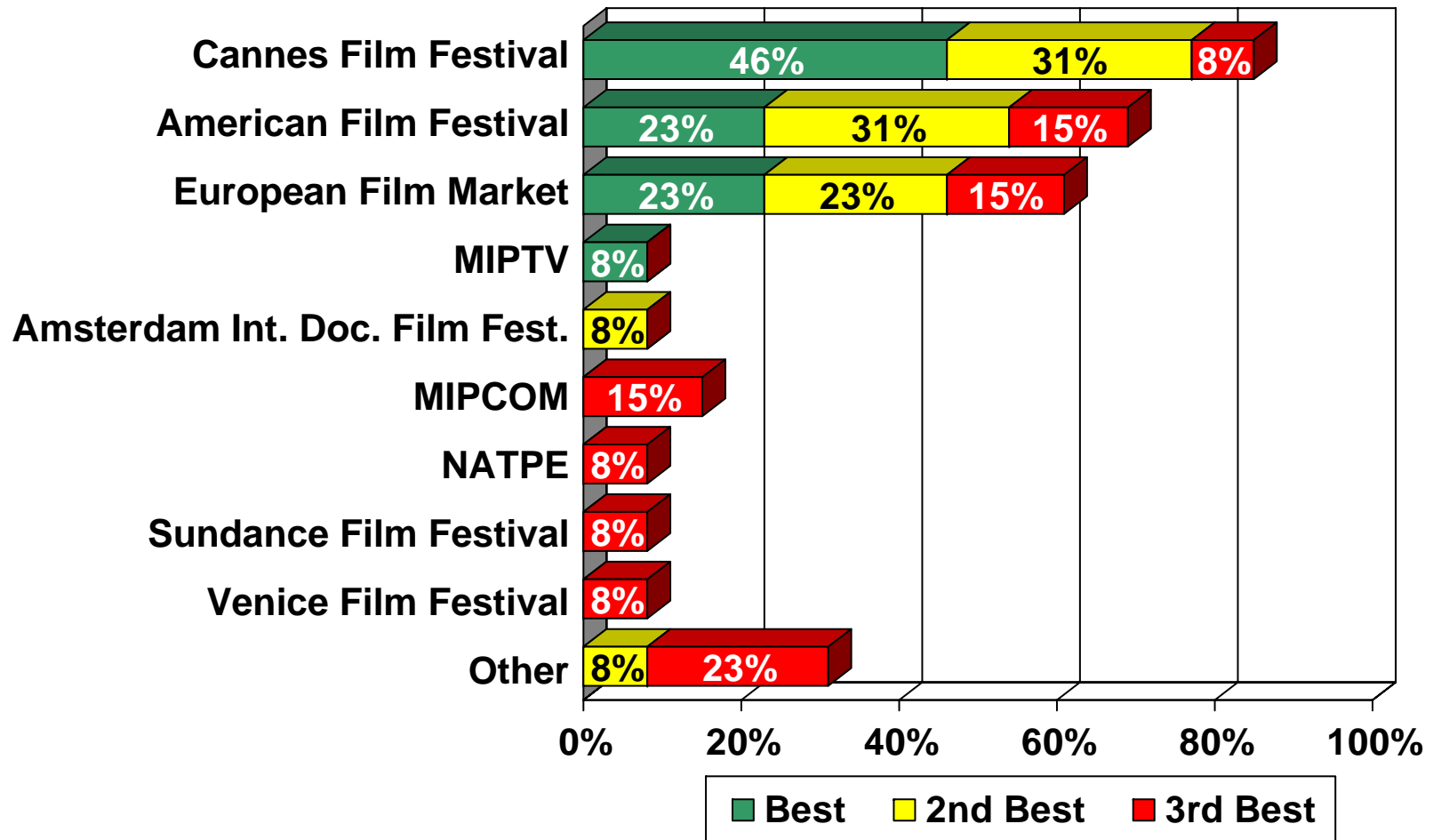
N=13

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*

Rating of International Festivals & Markets

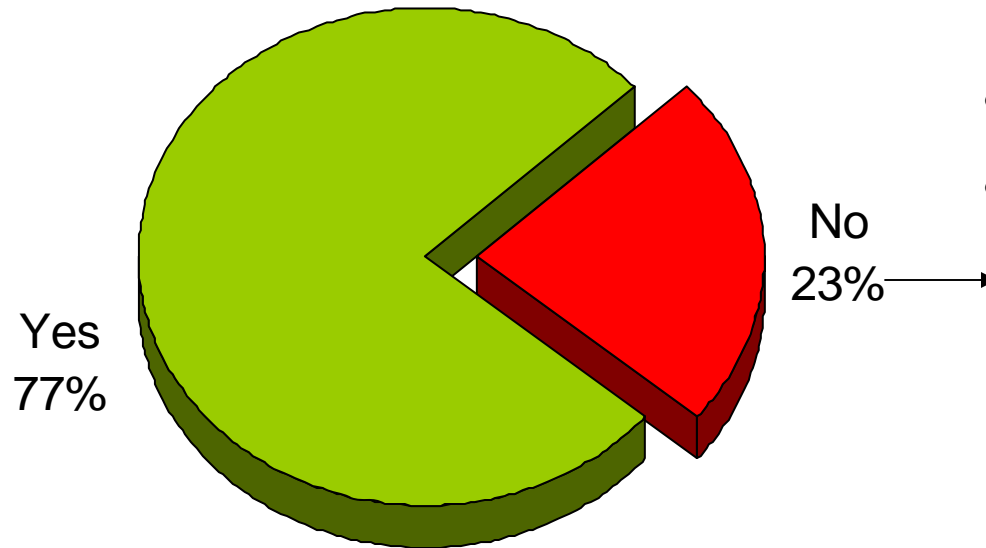


Q15 Thinking of the European Film Market together with the other major international events held outside of Canada, which one best meets your needs, is second best at meeting your needs, is third best at meeting your needs?



N=13

Used Services of Canada Pavilion?



WHY NOT?

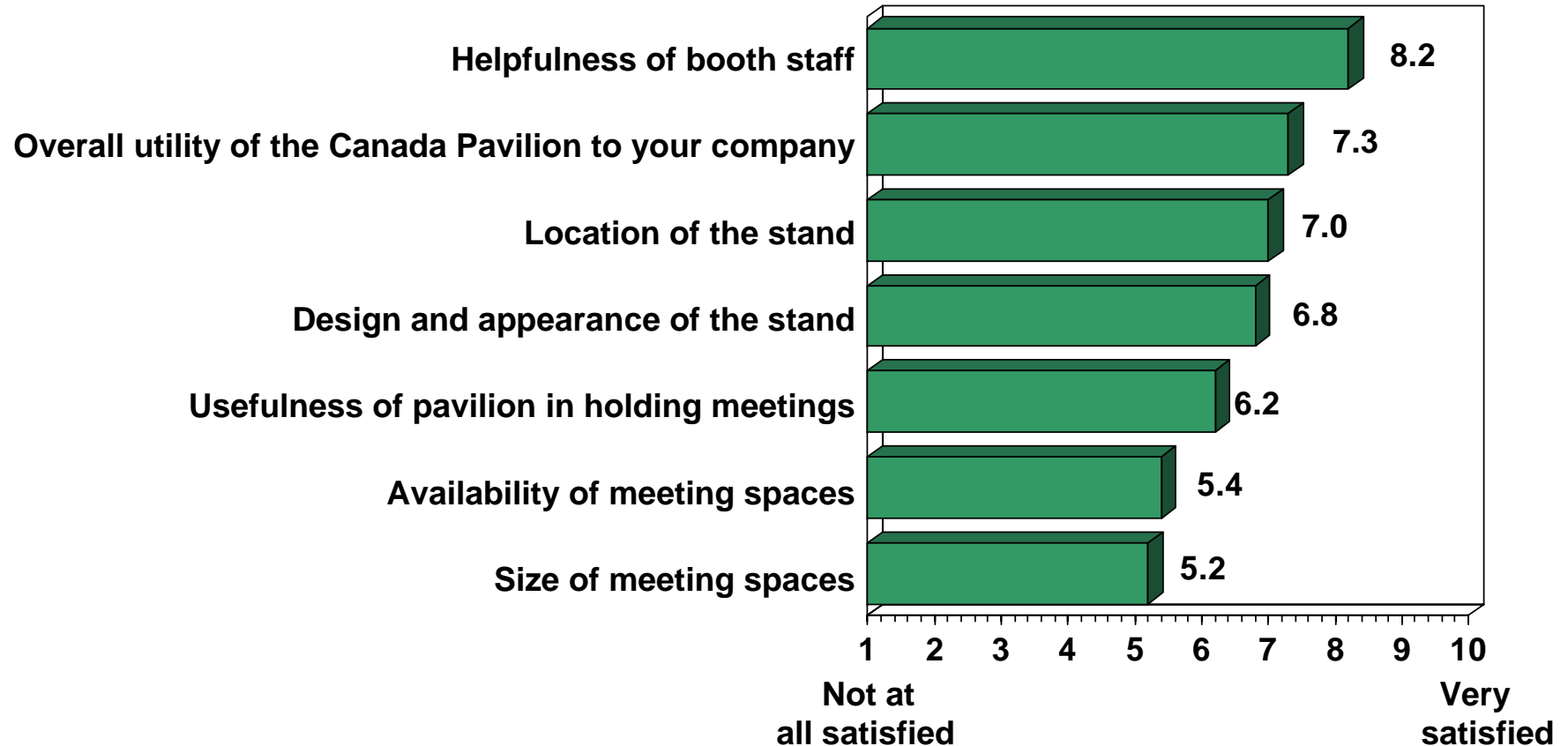
- *"It was structured for sales."*
- *"Not suitable, too small, no way for international community to easily identify Canadian producers. Needs to be rethought. Should be a directory of Canadian producers, more meeting areas, message system, boxes for people to leave messages. More opportunity to display materials & products"*

Q17 Did you use the services provided by the Canada Pavilion at the 2006 European Film Market? N=13

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



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 2006 European Film Market 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=10



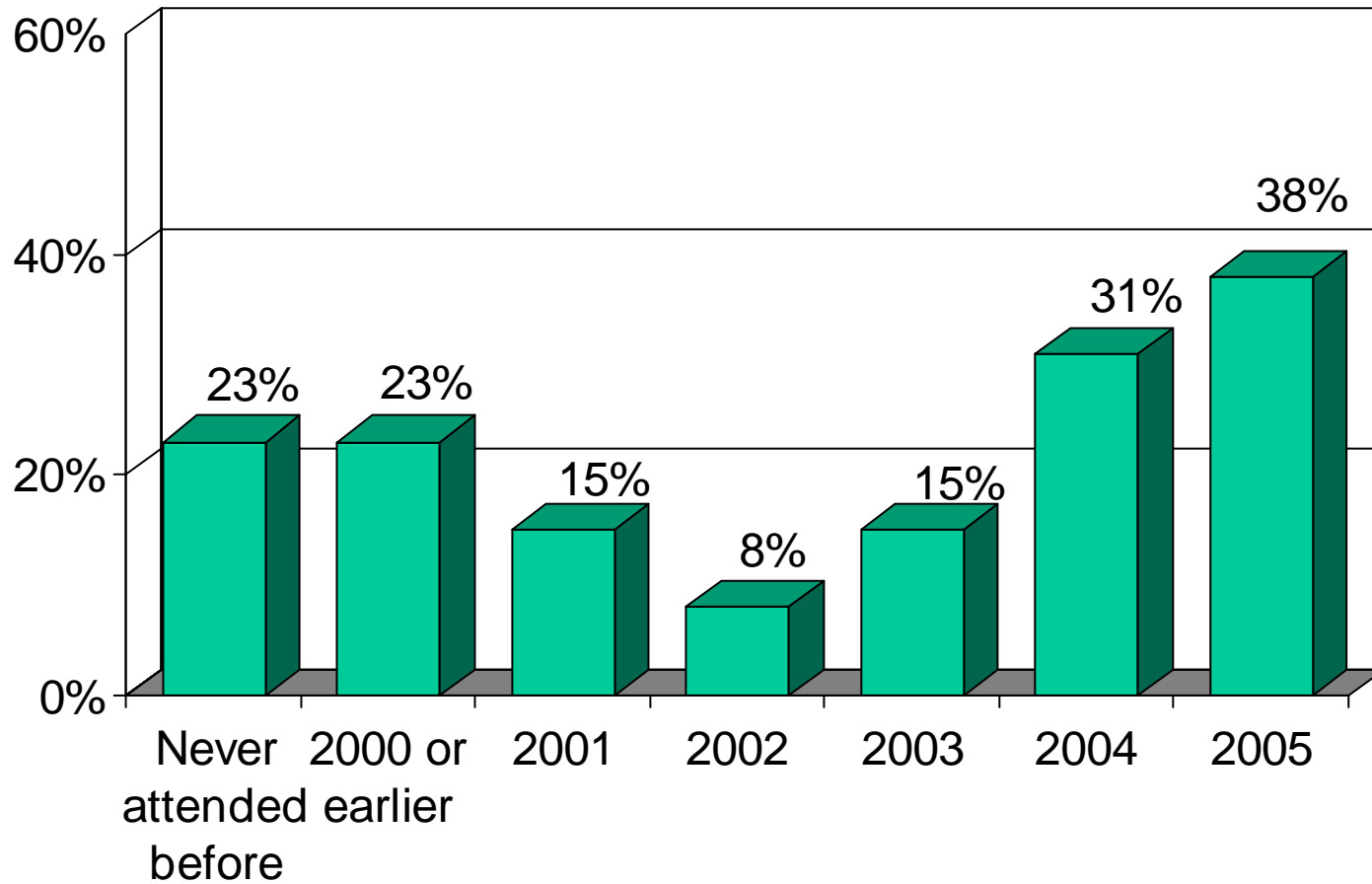
Suggestions for Future Improvements to the Canada Pavilion

- ***“More seating for meetings. Well-located, great staff, just not enough room.”***
- ***“The space provided was fine but, if finances permit, a bit more space would be useful”***
- ***“Larger space, less congested”***
- ***“SVP plus d'espace pour le prix payé, avoir une distributrice d'eau, organisation moins efficace que lors des MIP (ex matériel arrivé en retard, personnel a l'accueil plus ou moins professionnel)”***
- ***“Better leadership from organizers and assistance in addressing technical problems and company representation issues. Fulfill an active role in more actively linking Sellers and Producers”***
- ***“Centralization of everything in general would be better.”***

Q20 (THOSE WHO DID USE THE CANADA PAVILION) Please provide any suggestions you may have on how the Canada Pavilion could be improved in the future.



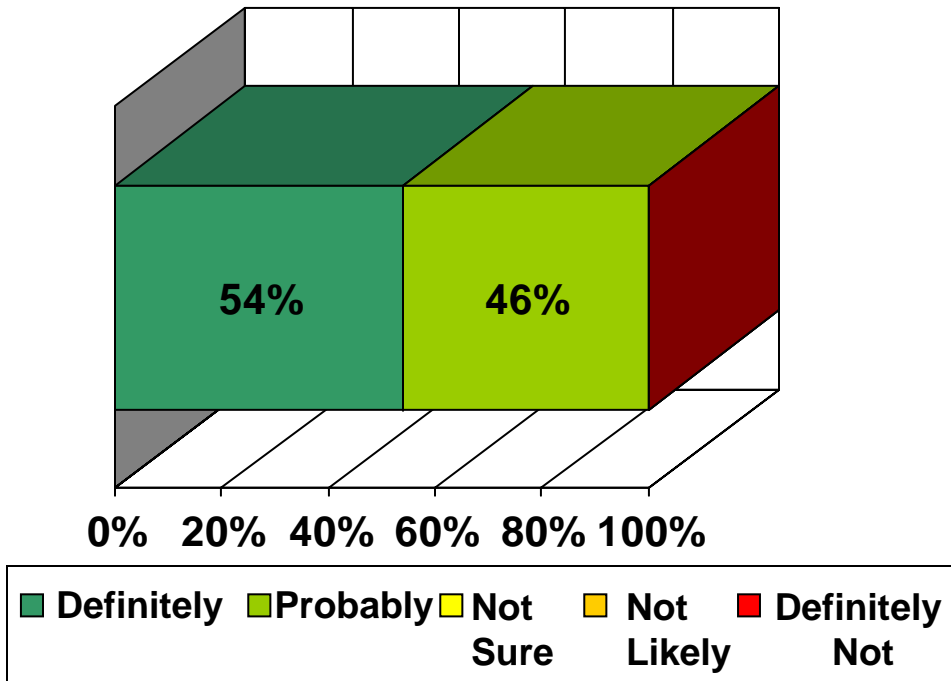
Past Attendance at EFM



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

N=13

Likelihood of Recommending EFM to Others



- *“It is obviously one of the key international markets for filmmakers.”*
- *“Useful, smaller than Cannes, geared to indie and arthouse films, good selection of European distributors & sales agents, good access to press”*

- *“The EFM attracts serious and accomplished business individuals, is more accessible than Cannes and broader opportunities than the AFM.”*

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

Q22b. Please explain your answer.

N=13



Likelihood of Recommending EFM to Others

- *“I had a wonderful experience. Have found international interest for all my feature film projects in development. Have made GREAT connections. Best festival I have attended.”*
- *“Excellent venue and user friendly market for producers seeking pre-sales (sales agents) and contacts”*
- *“Great opportunity to make new industry acquaintances and research future business partnerships, important to meet buyers and distributors and have a presence in the marketplace.”*
- *“Last year I made incredibly good contacts. Germans were especially interested in meeting Canadian producers. I am now using 2 of the funds (VIP and Equity) and a private one from those meetings even though there are issues these companies are dealing with at the moment.”*
- *“It's easy to navigate, easy to find people, staff helpful, manageable size, friendly atmosphere.”*



Q22b. Please explain your answer.

N=13

Likelihood of Recommending EFM to Others

- *“Pas pour tous mais très utile pour ceux qui ont un film sélectionné et des projets de coproductions internationales”*
- *“Cannes and AFM are better”*
- *“Je crois que c'était pa première année a voir ette expérience et qu'avec le temps les choses rouleront mieux mais les couts demandés sont très chers pour les entreprises canadiennes voila pourquoi nous niveau de satisfaction est plus élevé. Demander qu'on baisse la température de la pièce c'était invivable, empêcher les exposants de fumer etc...Il y avait un manque de rigueur a cet effet de la part de l'organisation générale...”*



Q22b. Please explain your answer.

N=13

Cost of Attending the 2006 EFM

- Companies incurred an average cost of \$6,900 in attending the 2006 European Film Market.
- 69% of companies indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend the event.
- 2 companies each received \$2000 of federal funding.
- Companies received an average of \$1456 in provincial funding.



Other Comments

- *“Telefilm's staff did a terrific job of providing on the ground support for Canadians in Berlin. The EFM has come into its own as a viable place to make deals and get business done. Besides the logistical support, it is also valuable to have a national stand there (and at Cannes, Sundance & the AFM for that matter) for the purposes of promoting Canada as (a) player on the international scene -- much like the Australians, Unifrance and the European Film Promotion offices.”*
- *“The EFM is very producer friendly and the TFC booth functions extremely well”*
- *“Better information to companies exhibiting information to the stand. I did not receive an invitation to the Telefilm organized party and had to request this along with the Producer for pick”*



Q26. Finally, please provide any other comments you have on the 2006 European Film Market or suggestions for improving the support provided by Telefilm and its partners.

Other Comments

- *“Need more of a menu of support to be discussed in advance of the market. Needs are not all the same. Different targets and objectives should be established.”*
- *“Possibly help in the distribution end of things. Round tables with distributors and producers. Telefilm in Cannes does a fantastic job. It isn't as apparent in Berlin.”*
- *“More profile for Canadians. A screening facility, pictures-board for Canadians. More presence, better organized seminar day - it was not useful.”*



Q26. Finally, please provide any other comments you have on the 2006 European Film Market or suggestions for improving the support provided by Telefilm and its partners.