

MIPTV - Outcomes Report

Conducted by:



June 2006

Methodology

- A total of 68 e-mailed invitations were sent to Canadian companies that attended MIPTV 2006.
- 58 of the 68 companies clicked on the link in the e-mail invitations to go to the survey site.
- Of these 58, 54 completed all of the survey - a 79% response rate.
- The survey was open from April 25 until June 22, 2006.
- During the course of the survey, POLLARA and members of the IIAC followed up with non-responding companies by e-mail and by telephone to encourage them to participate.

Methodology

E-mail invitations sent to 68 companies



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



54 companies reached the
end of the survey



Sample and Respondents by Province

➔ Broken down by province, the sample consisted of the following companies.

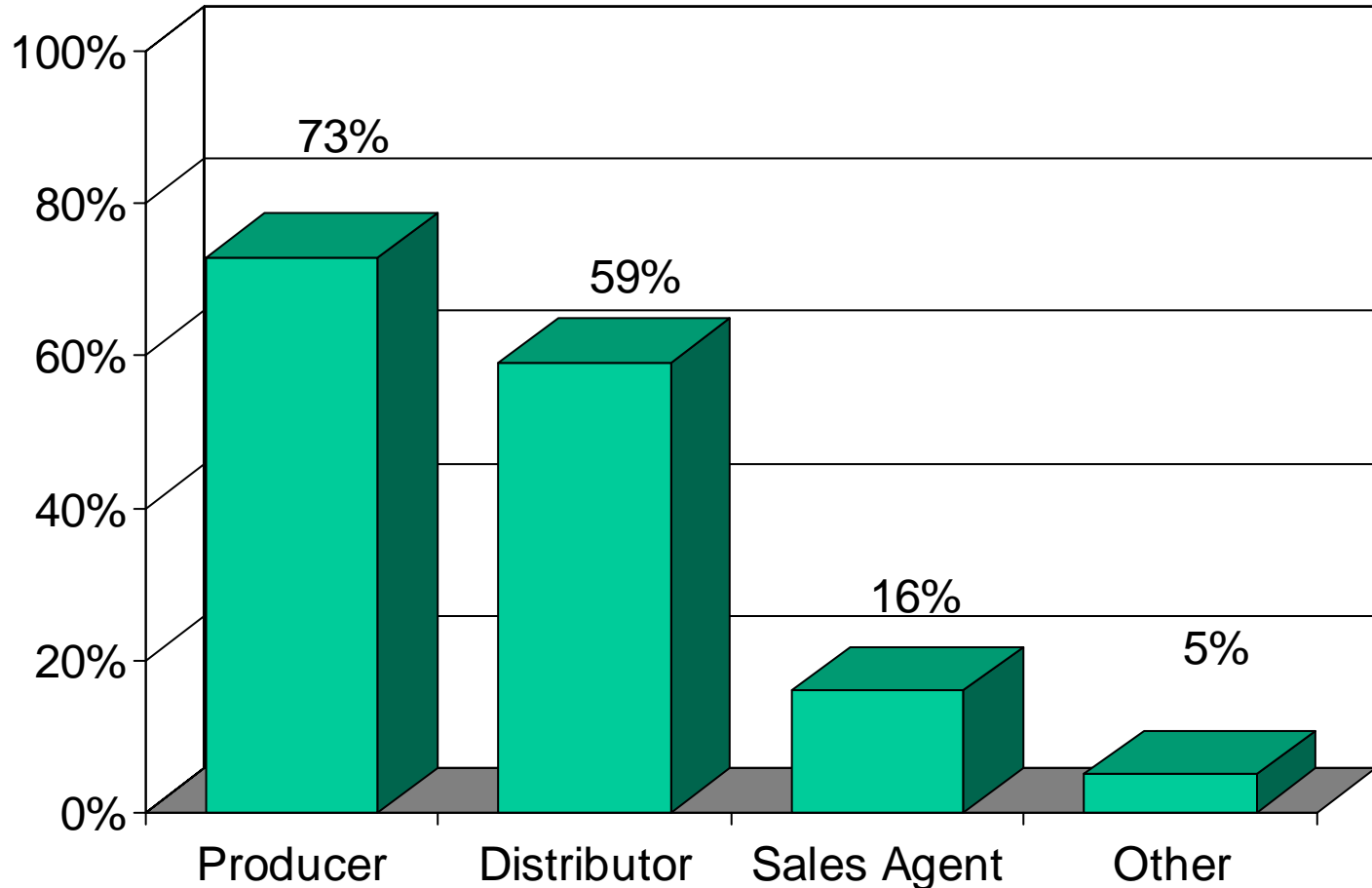
Province	Number of companies in sample	Number of companies starting survey	Number of companies completing survey
Ontario	36	31	31
Quebec	18	14	12
British Columbia	9	8	8
Alberta	2	0	0
Nova Scotia	1	1	1
Saskatchewan	1	1	1
Manitoba	1	1	1
Total	68	56	54



Respondent Profile

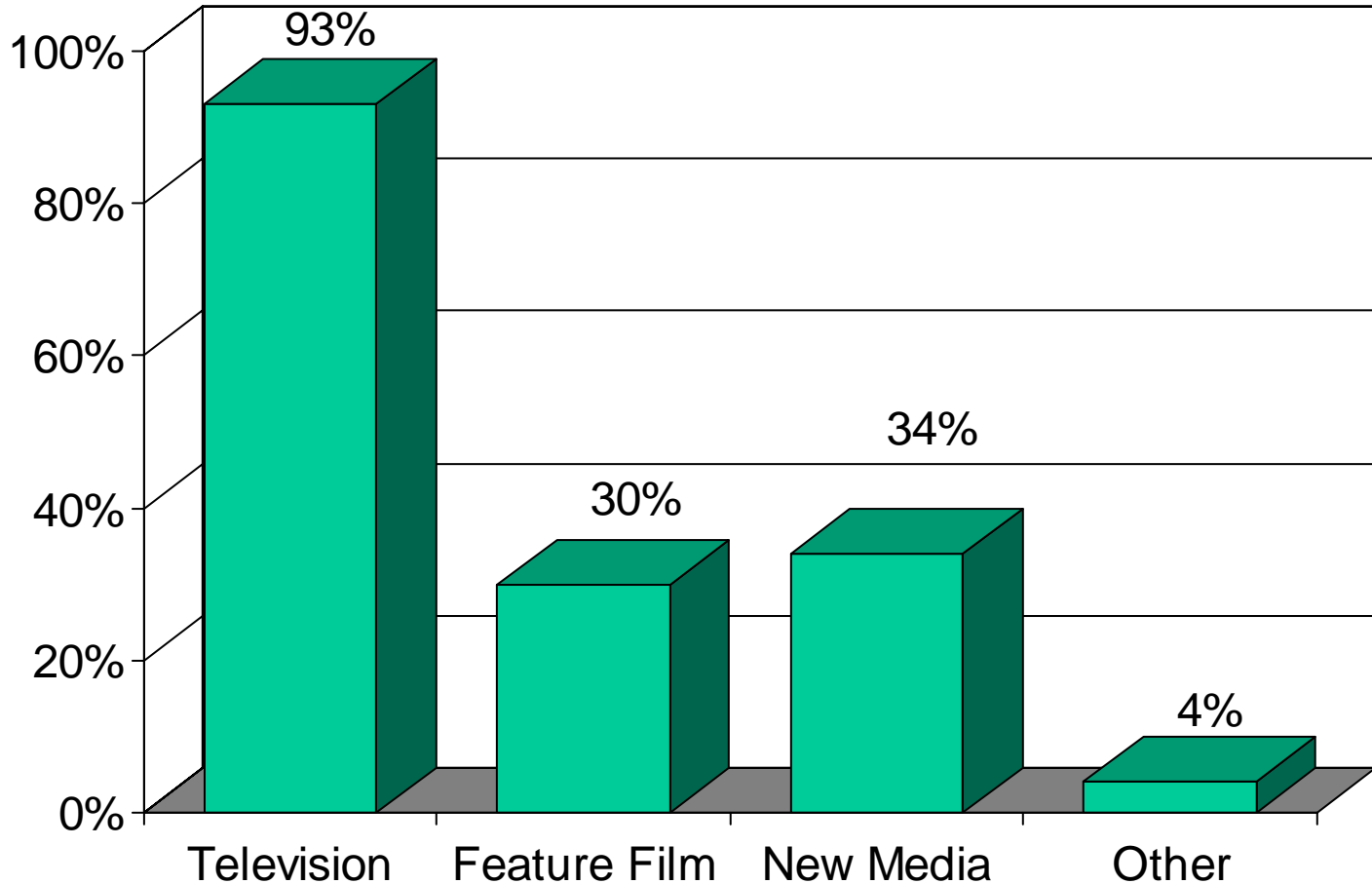


Primary Business Focus of Company



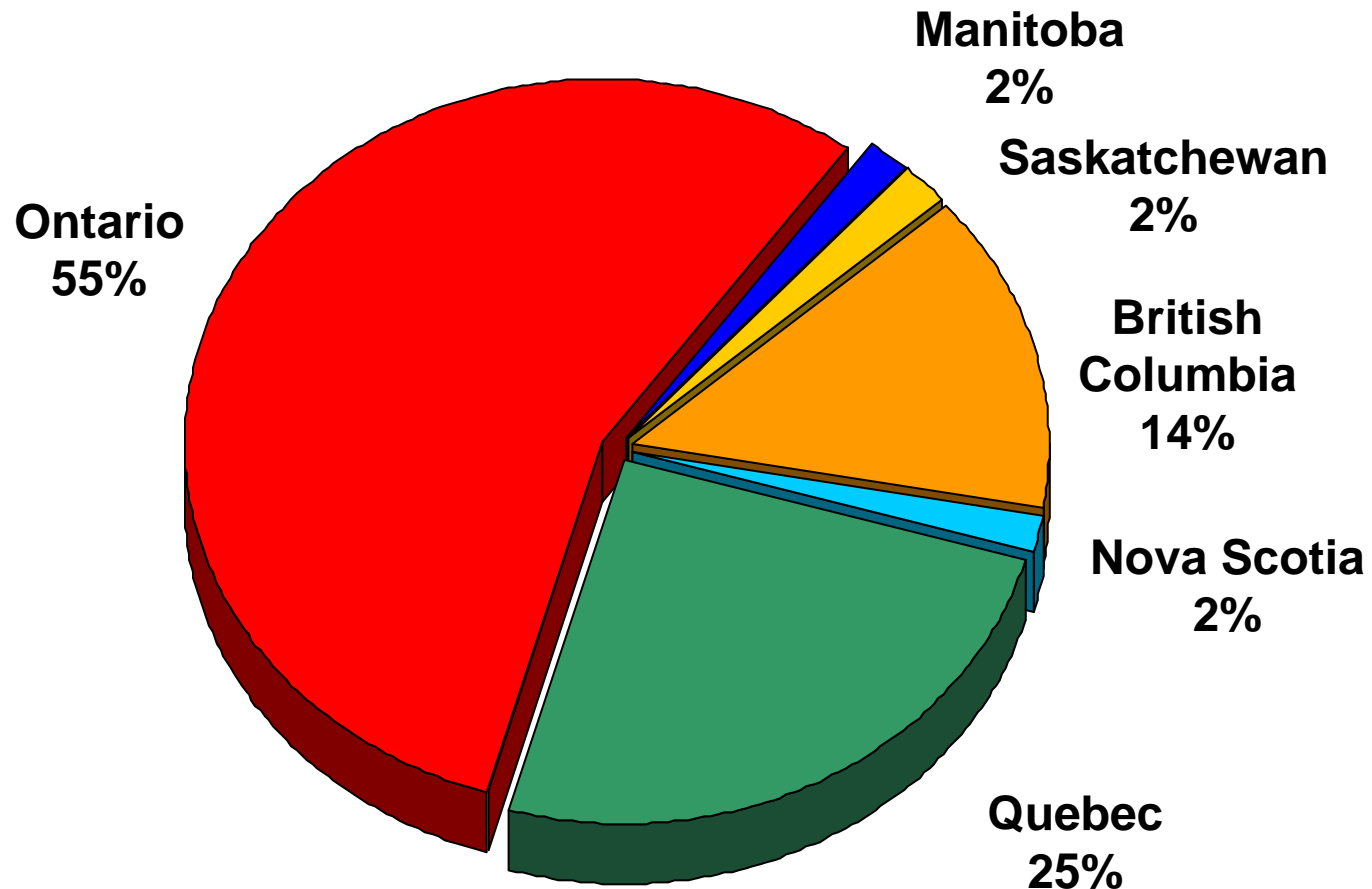
Q1. What is the primary business focus of your company? *Select all that apply.*
N=56

Main Format(s) of Interest



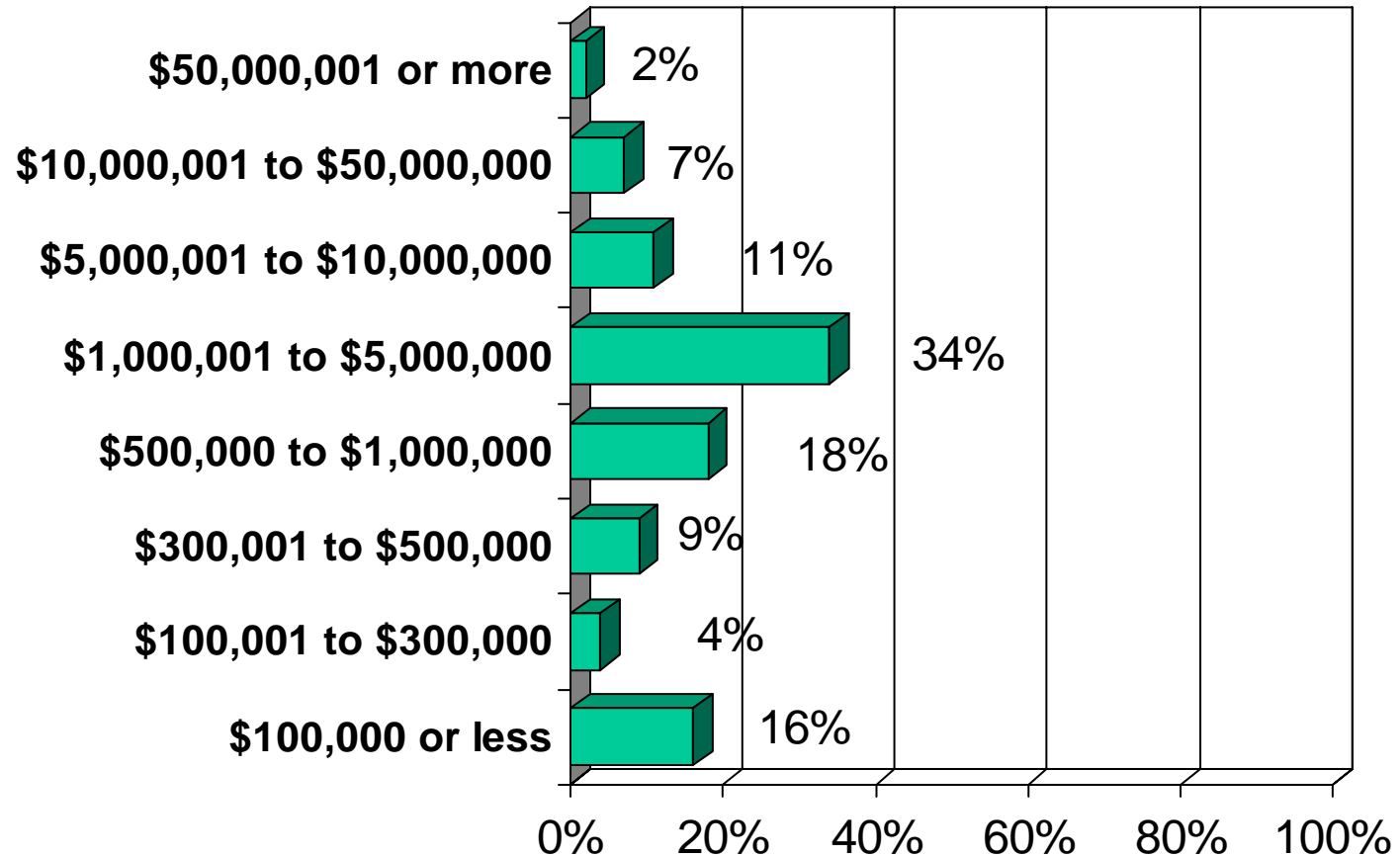
Q2. What is the main format(s) of interest to your company? *Select all that apply.*
N=56

Location of Head Office



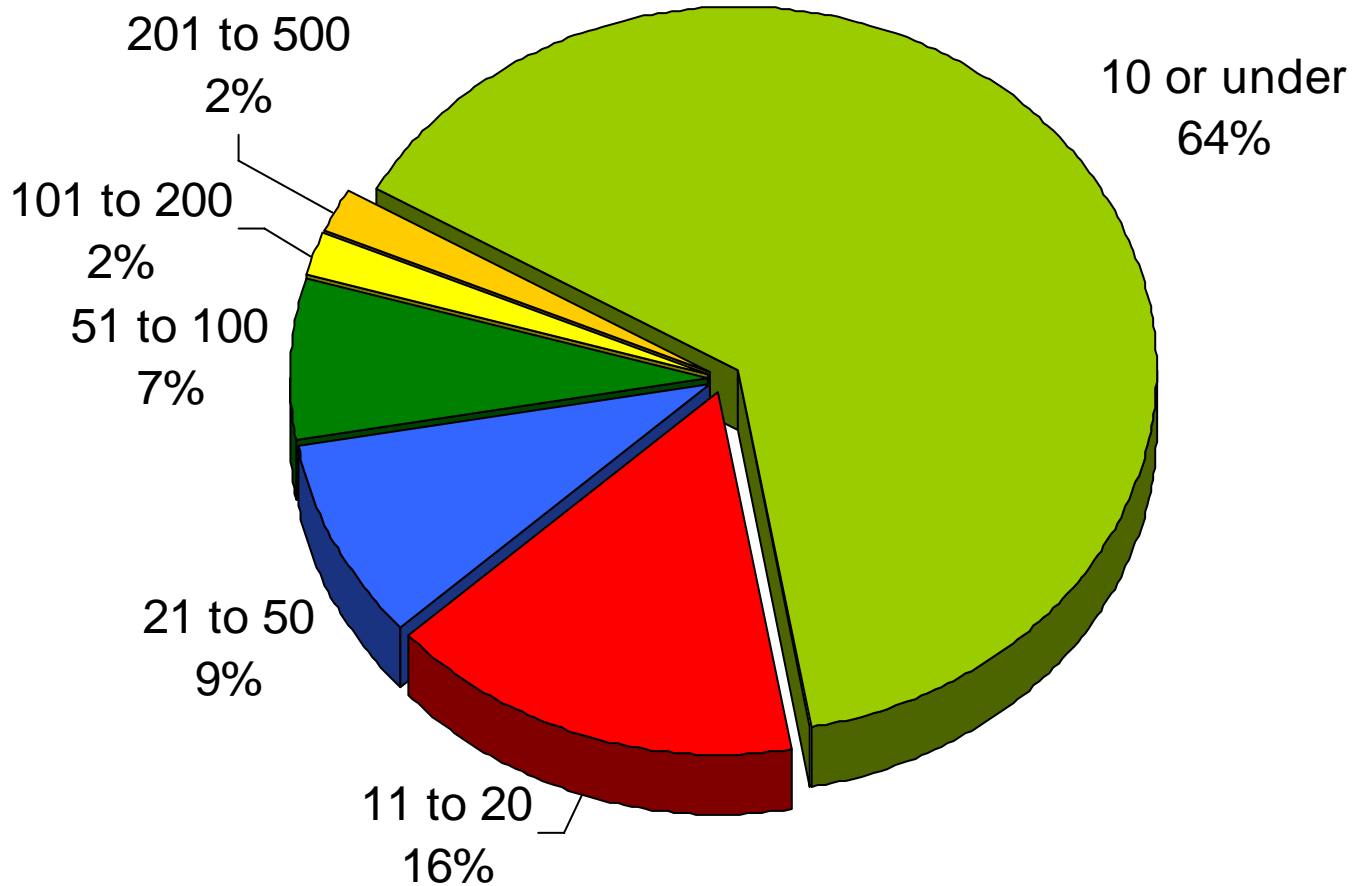
Q3. In which province/territory is your head office located? N=56

Company Revenues



Q4. What were your company's total gross revenues for its most recent fiscal year?
N=56

Number of Employees



Q5. How many full-time employees are there currently in your company?
N=56

The Television Market



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

	Feature Film	Television	New Media
Children's Programming	11%	62%	20%
Documentary/educational	9%	56%	9%
Animation	16%	47%	18%
Lifestyle	2%	36%	5%
Drama	20%	25%	4%
Comedy	13%	29%	7%
Reality	0%	25%	7%
Performing Arts	5%	18%	4%
Action/Adventure	4%	11%	4%
Sports	0%	11%	4%
Horror/Thriller	7%	5%	0%
Science Fiction	4%	7%	0%
Romantic	4%	4%	2%
Public Affairs	0%	7%	2%
Erotica	0%	5%	0%
Other	0%	2%	4%

Q6. In deciding to attend the 2006 MIPTV, 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

- 52 companies indicated that they either completed sales while at MIPTV or began discussions that are likely to lead to sales while at MIPTV. 31 companies indicated that they either completed pre-sales while at MIPTV or began discussions that are likely to lead to pre-sales.
- Of these, 34 companies provided information on 223 deals involving 154 titles.
- Companies reported that 54 distribution agreements were signed.
- Respondents reported that \$1,660,050 of sales were completed while at MIPTV 2006 and that \$20,651,004 worth of sales are likely to occur as a result of discussions initiated at MIPTV.
- Companies also report that \$530,400 of pre-sales were completed at MIPTV and that they expect \$14,481,200 of pre-sales to occur as a result of discussions initiated at MIPTV.

Breakdown of Sales and Pre-Sales Deals

Sales

31 Companies



138 Titles



188 Deals



\$1,660,050 Sales
completed while at
MIPTV 2006

\$20,651,004 Sales
likely to occur as a
result of discussions
completed while at
MIPTV 2006

Pre-Sales

15 Companies



26 Titles



35 Deals

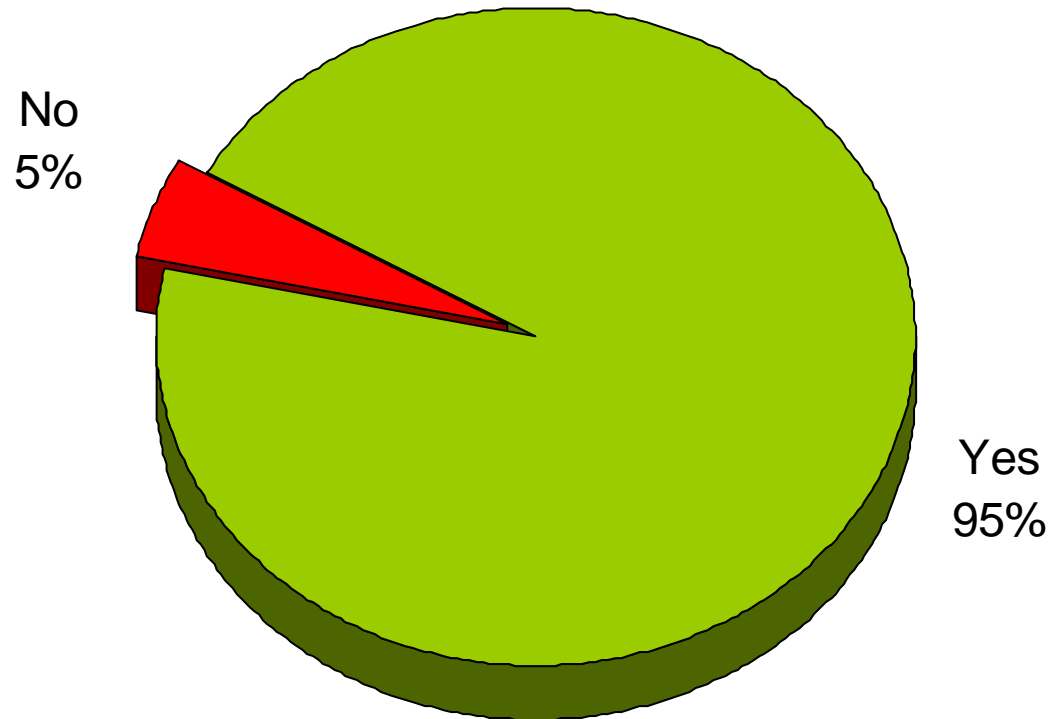


\$530,400 Pre-Sales
completed while at
MIPTV 2006

\$14,481,200
Pre-Sales likely to
occur as a result of
discussions completed
while at MIPTV 2006

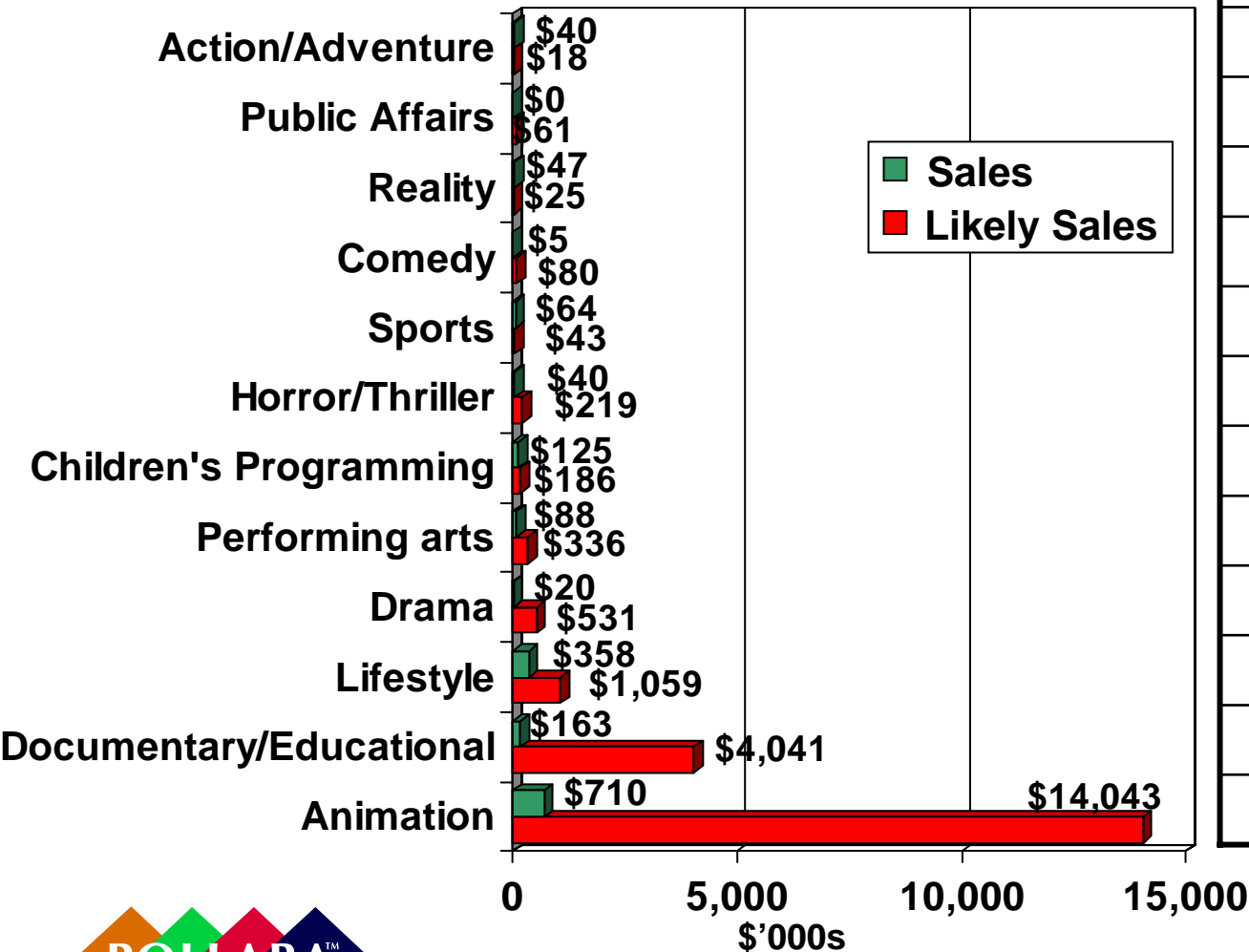


Sales



Q8a. Did you complete any sales of your titles, or begin discussions that will likely lead to future sales while at the 2006 International Television Programme Market (MIPTV)? N=55

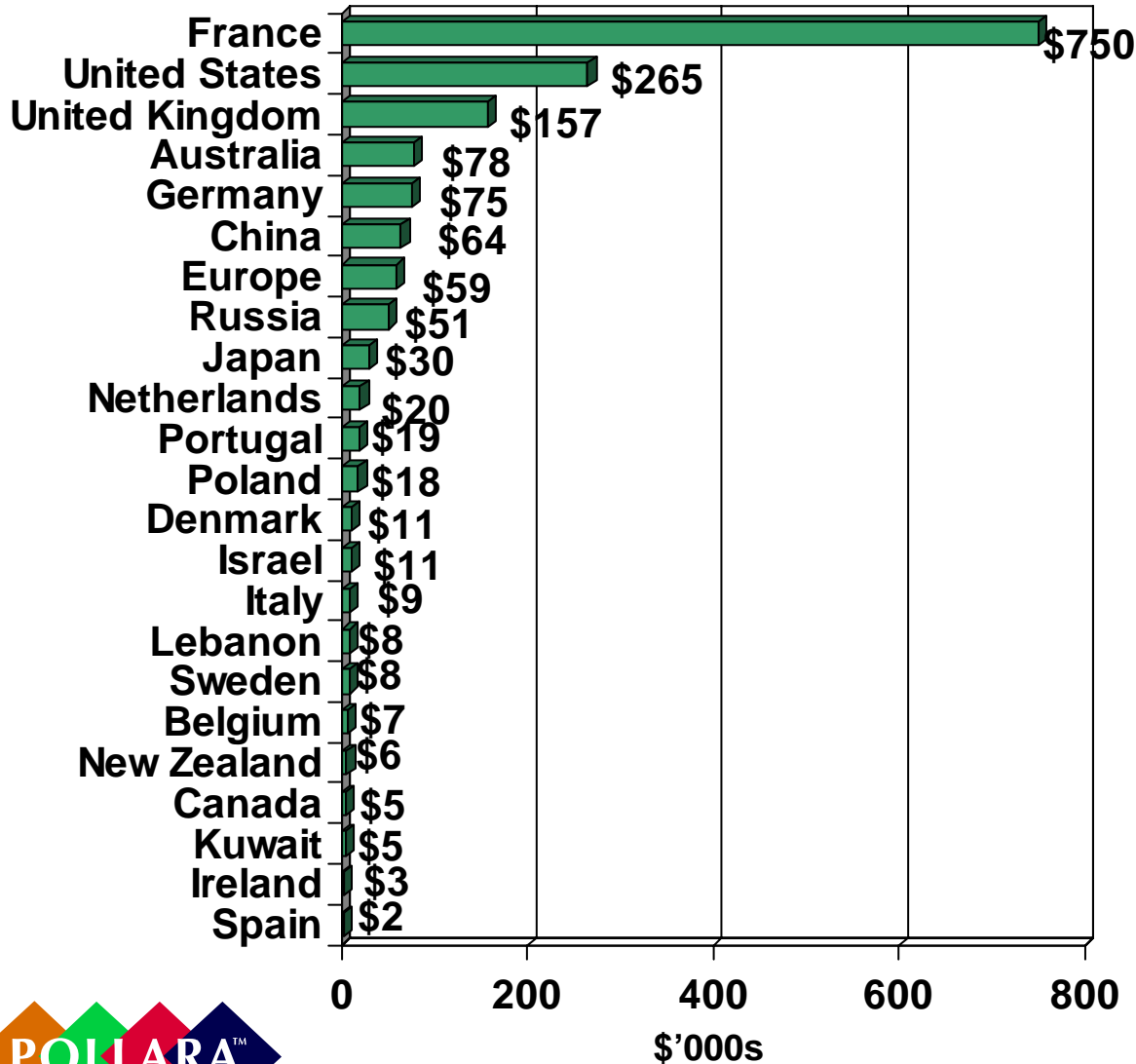
Breakdown of Sales and Likely Sales by Genre



Companies	Titles	Deals
2	4	4
1	1	6
3	3	3
3	3	4
3	6	7
2	2	5
5	8	12
4	7	12
6	14	21
9	25	31
16	44	52
11	21	31



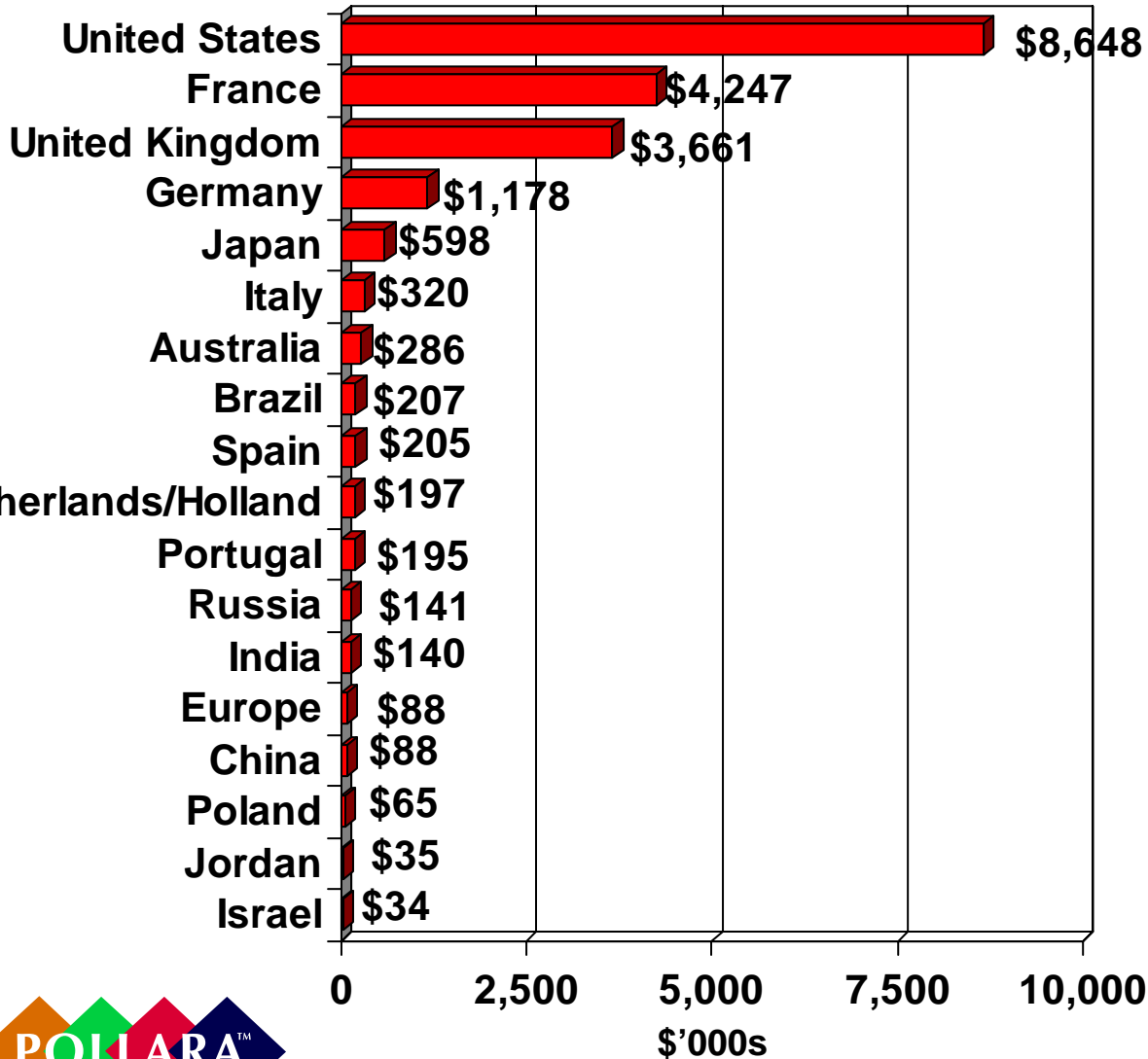
Breakdown of Sales by Country



Companies	Titles	Deals
2	2	2
3	3	3
3	4	4
2	4	6
1	1	1
2	3	3
2	2	2
2	2	2
1	1	1
1	1	1
1	4	4
2	2	2
2	2	2
2	3	3
1	1	1
1	3	3
1	1	1
1	1	1
1	3	3
1	1	1
1	1	1
1	1	1



Breakdown of Likely Sales by Country



Companies	Titles	Deals
11	17	17
13	14	14
6	8	8
5	10	10
3	4	4
7	8	8
4	7	9
3	3	3
4	5	5
3	4	4
1	4	4
4	6	6
3	3	3
3	4	4
2	4	4
4	10	10
1	3	3
3	4	4



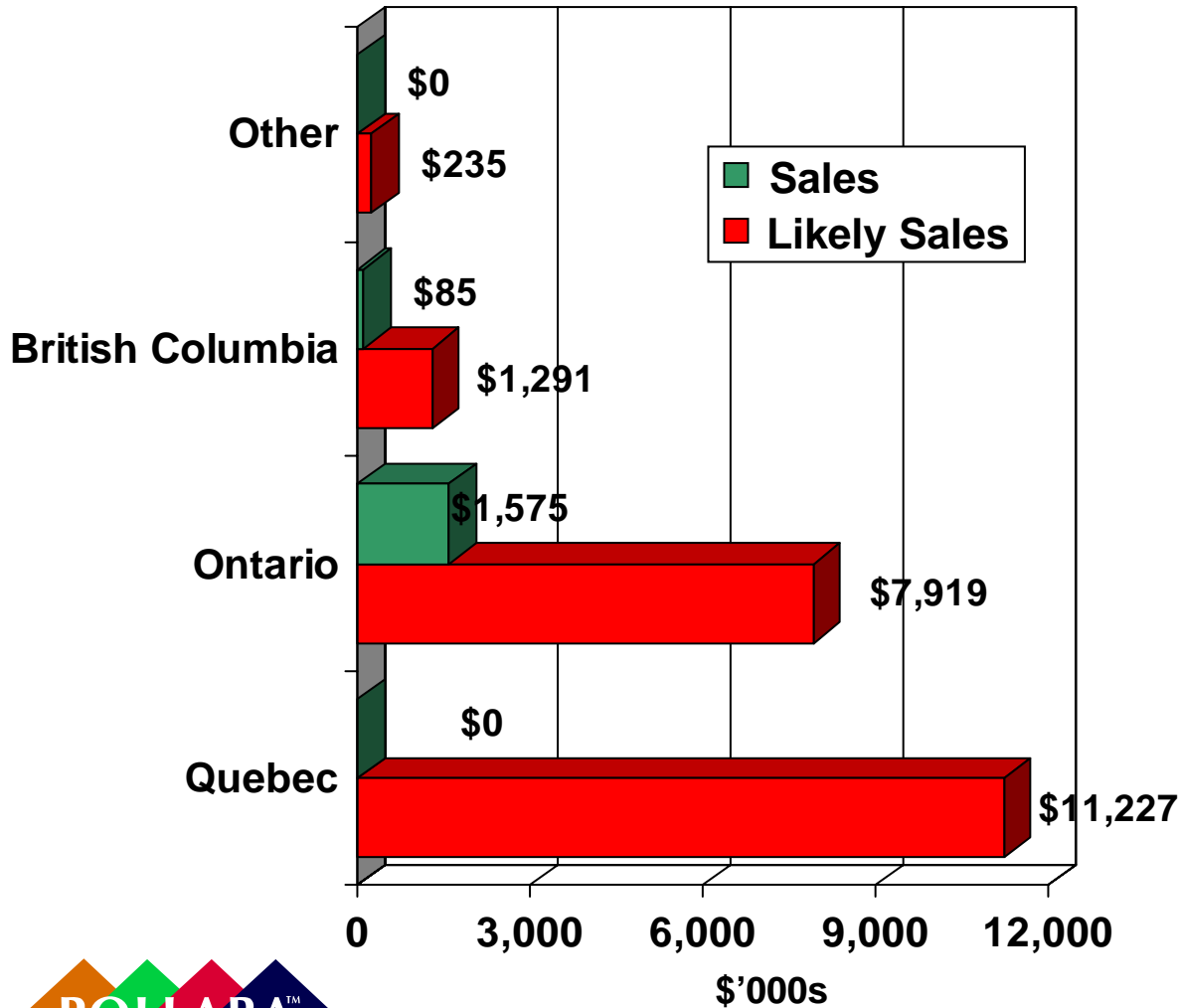
Breakdown of Likely Sales by Country (cont'd)



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



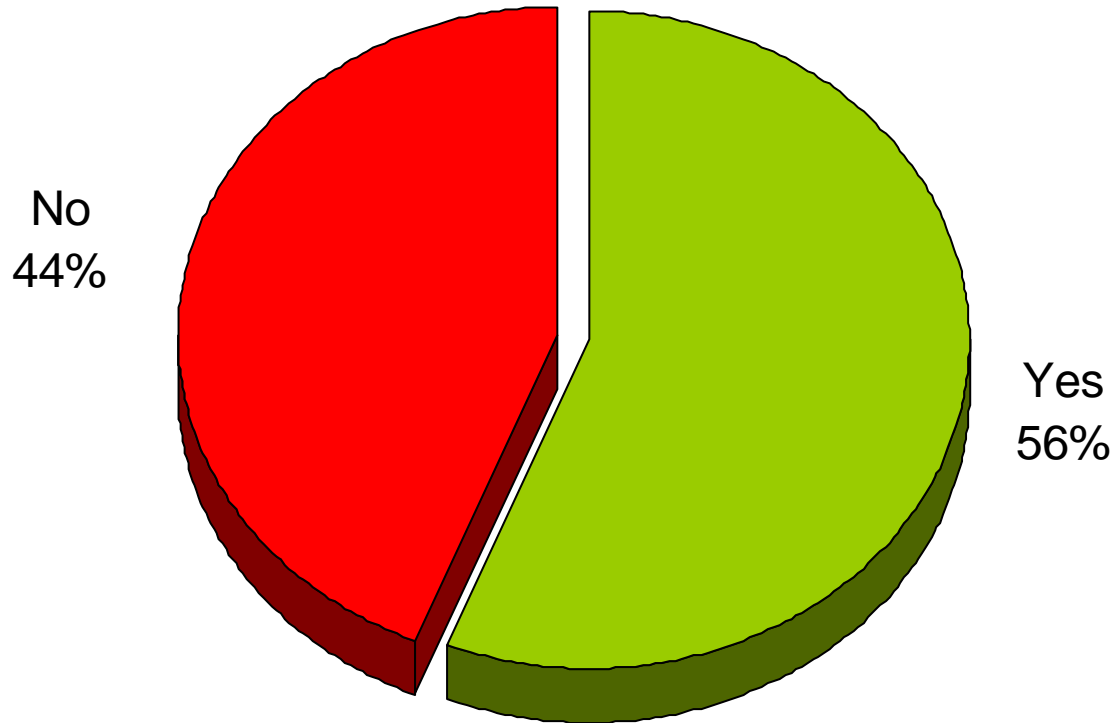
Breakdown of Sales and Likely Sales by Company Region



Companies	Titles	Deals
2	3	3
5	10	18
18	102	128
6	23	39



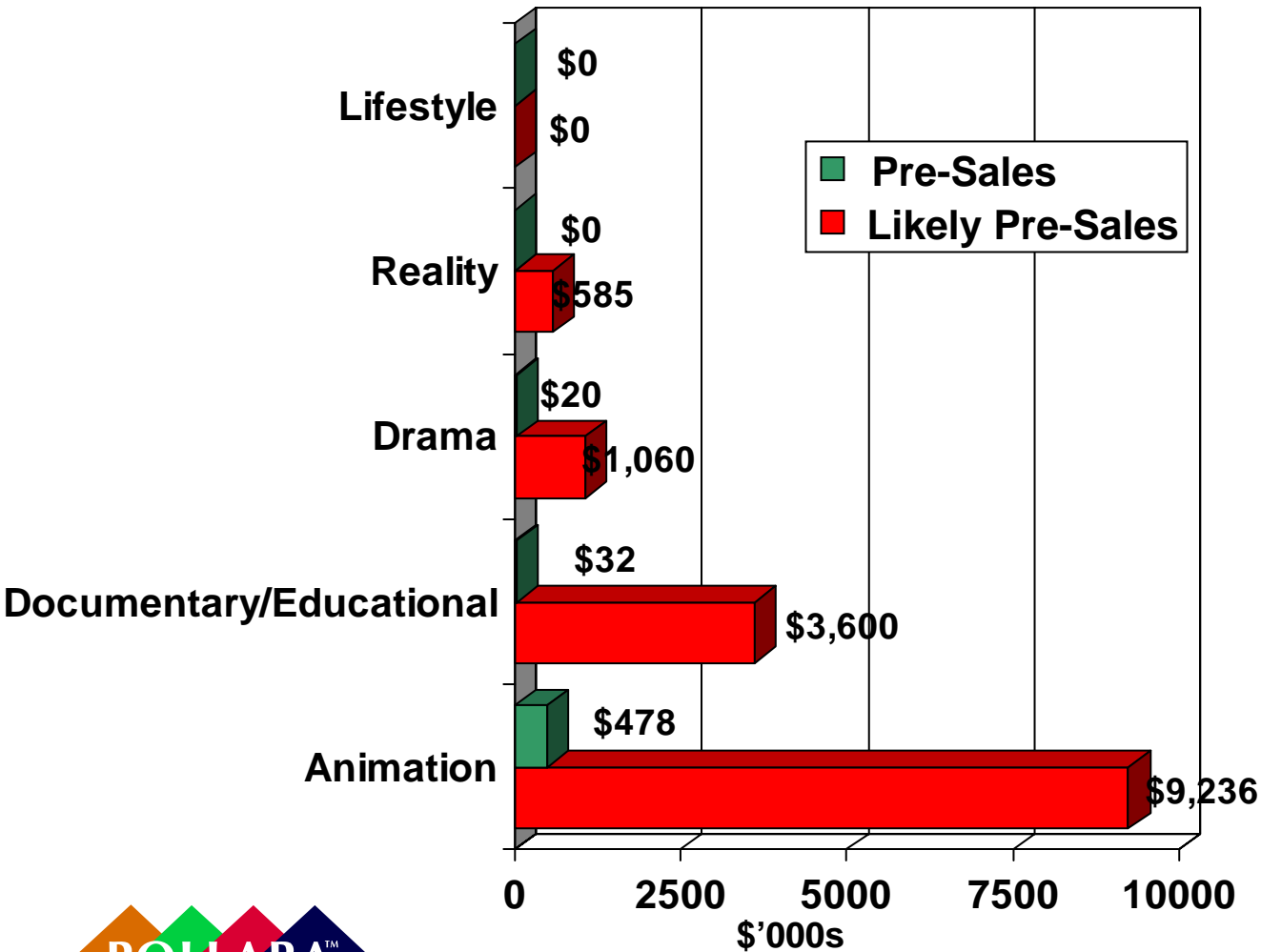
Pre-Sales



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

N=55

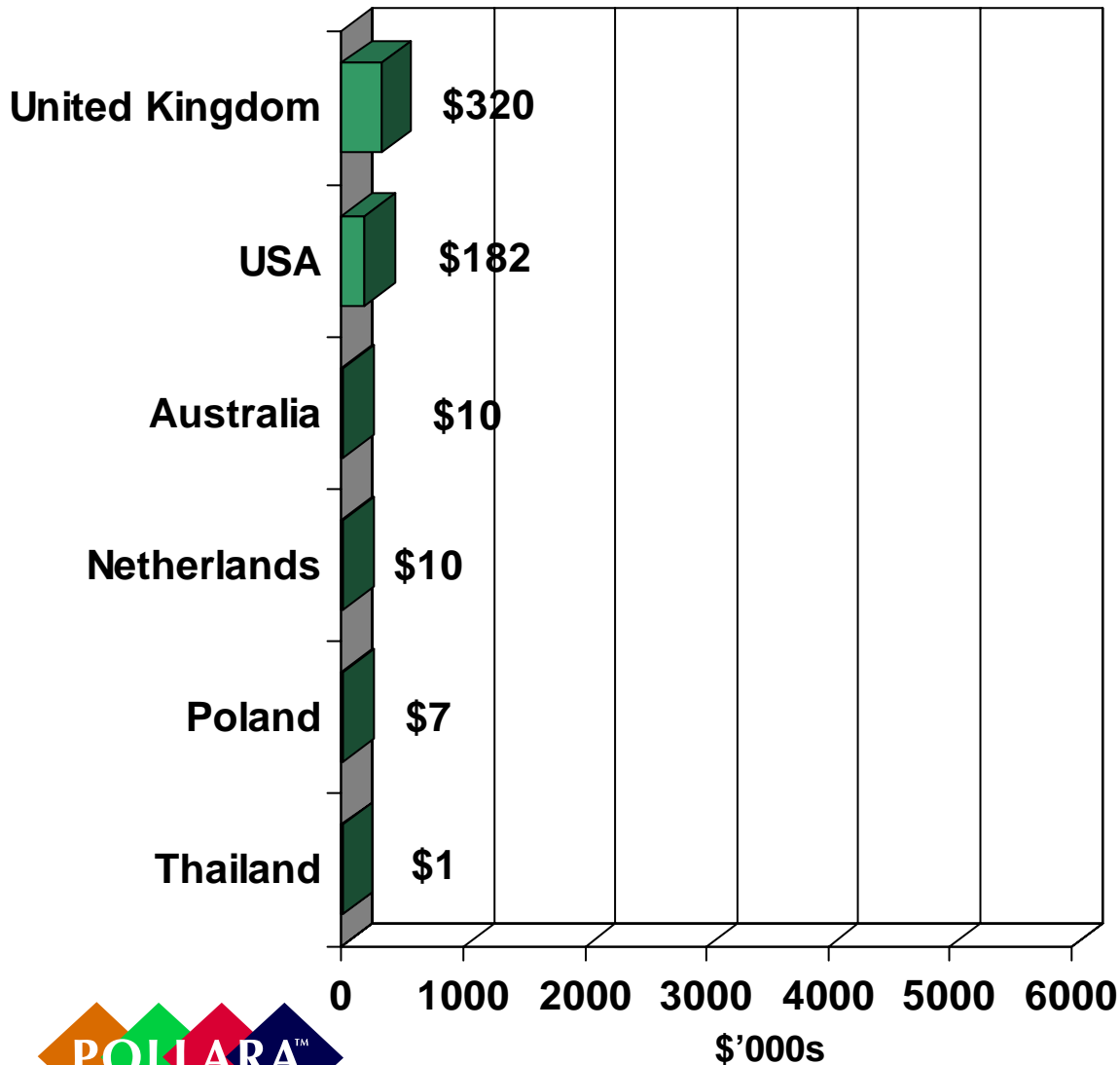
Breakdown of Pre-Sales and Likely Pre-Sales by Genre



Companies	Titles	Deals
1	1	1
1	1	2
3	3	3
6	11	11
7	10	18



Breakdown of Pre-Sales by Country



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



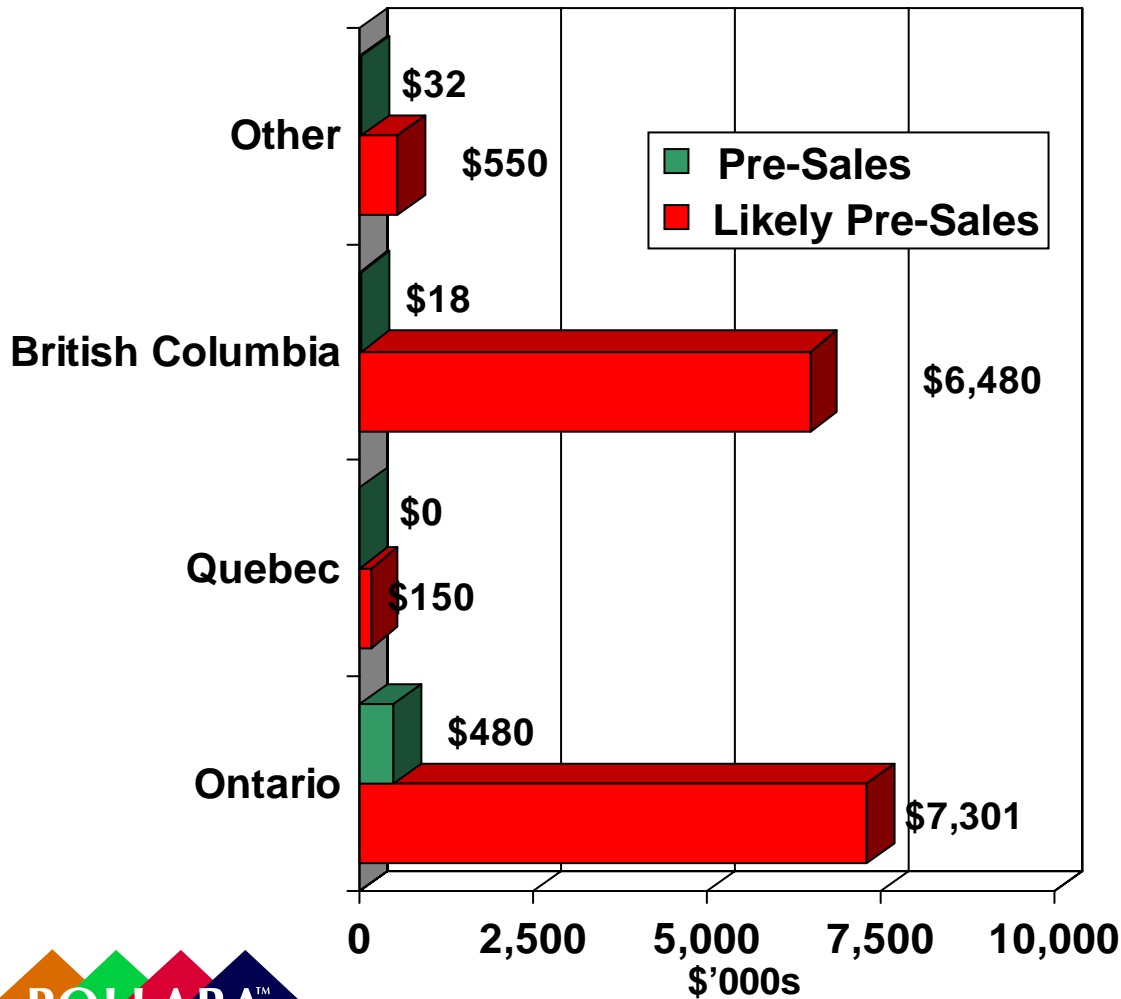
Breakdown of Likely Pre-Sales by Country



Companies	Titles	Deals
5	5	5
5	6	6
5	9	9
1	2	2
1	1	1
1	1	1
1	2	2
1	1	1



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



Companies	Titles	Deals
1	3	3
5	8	10
2	2	2
7	14	20



Co-Production and Co-Venture Deals

- 19 companies (35% of those who completed the survey) indicated that they either signed, or began negotiating co-production or co-venture deals while at MIPTV 2006.
- However, only 11 of these companies answer to all subsequent questions concerning the number of deals, the value of deals, and the countries with which these deals were made.
- 13 companies provided information about the number of co-production or co-venture deals - and reported a total of 28 deals.
- 13 companies provided information about the value of co-production or co-venture deals - and report that the deals were worth \$40,970,000
- 18 companies provided information about the countries with which deals were made.
- Respondents reported that they participated in an average of 41 business meetings each while at MIPTV 2006.*



*Note: This average is skewed by a two companies that reported participating in over 130 business meetings each - a more representative average is the median score which is 30 meetings.

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	3	\$3,500,000	France
2	3	\$800,000	Ireland, UK
3	3	\$10,000,000	France, UK
4	6	\$6,000,000	-
5	2	\$800,000	Switzerland
6	-	\$7,000,000	UK
7	1	\$70,000	UK
8	2	\$1,500,000	Australia, UK
9	1	\$1,000,000	France
10	1	\$300,000	UK
11	2	\$100,000	Israel
12	2	\$900,000	France
13	2	\$9,000,000	France, Germany, UK, USA

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 MIPTV 2006?

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?



Co-Production and Co-Venture Deals by Company Region

Region	Number of companies	Q9b - Number of co-production or co-venture deals	Q9c - Estimated Value of deals to company
Ontario	8	13	\$11,470,000
Quebec	3	6	\$20,000,000
British Columbia	1	3	\$3,500,000
Other	1	6	\$6,000,000

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 MIPTV 2006?

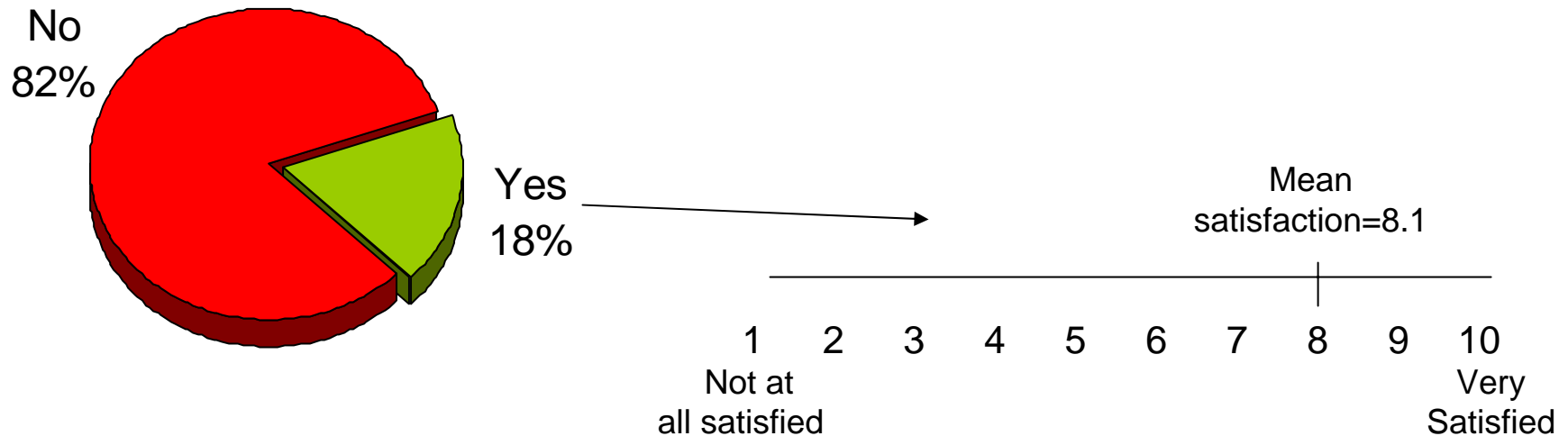
Q9c. What is the estimated value to your company of these co-productions or co-venture deals (in Canadian Dollars)



Title Screening

→ 18% of respondents indicated that they had a title screened at the 2006 International Television Program Market.

→ These respondents gave an average satisfaction score of 8.1 for the visibility their titles received from the screenings

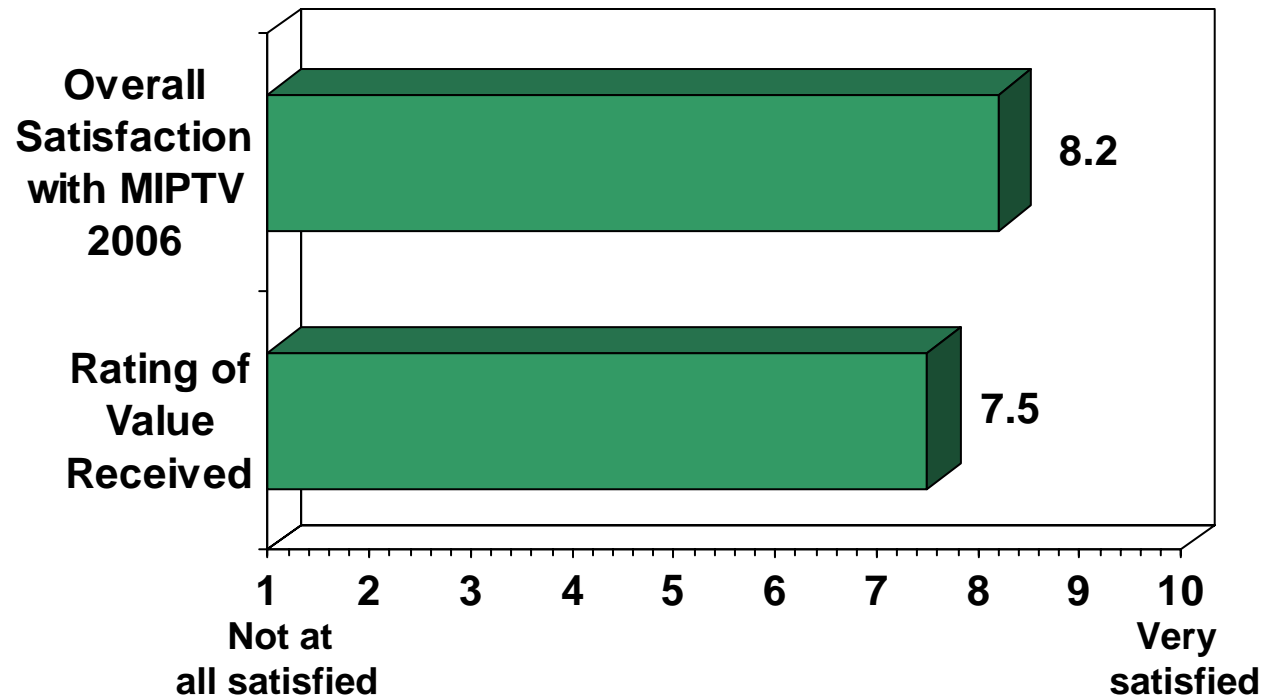


Q11. Were any of your titles screened at the 2006 International Telefilm Program Market (n=55)

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=10)



Overall Satisfaction With and Value of MIPTV 2006



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



N=55

Satisfaction with MIPTV 2006

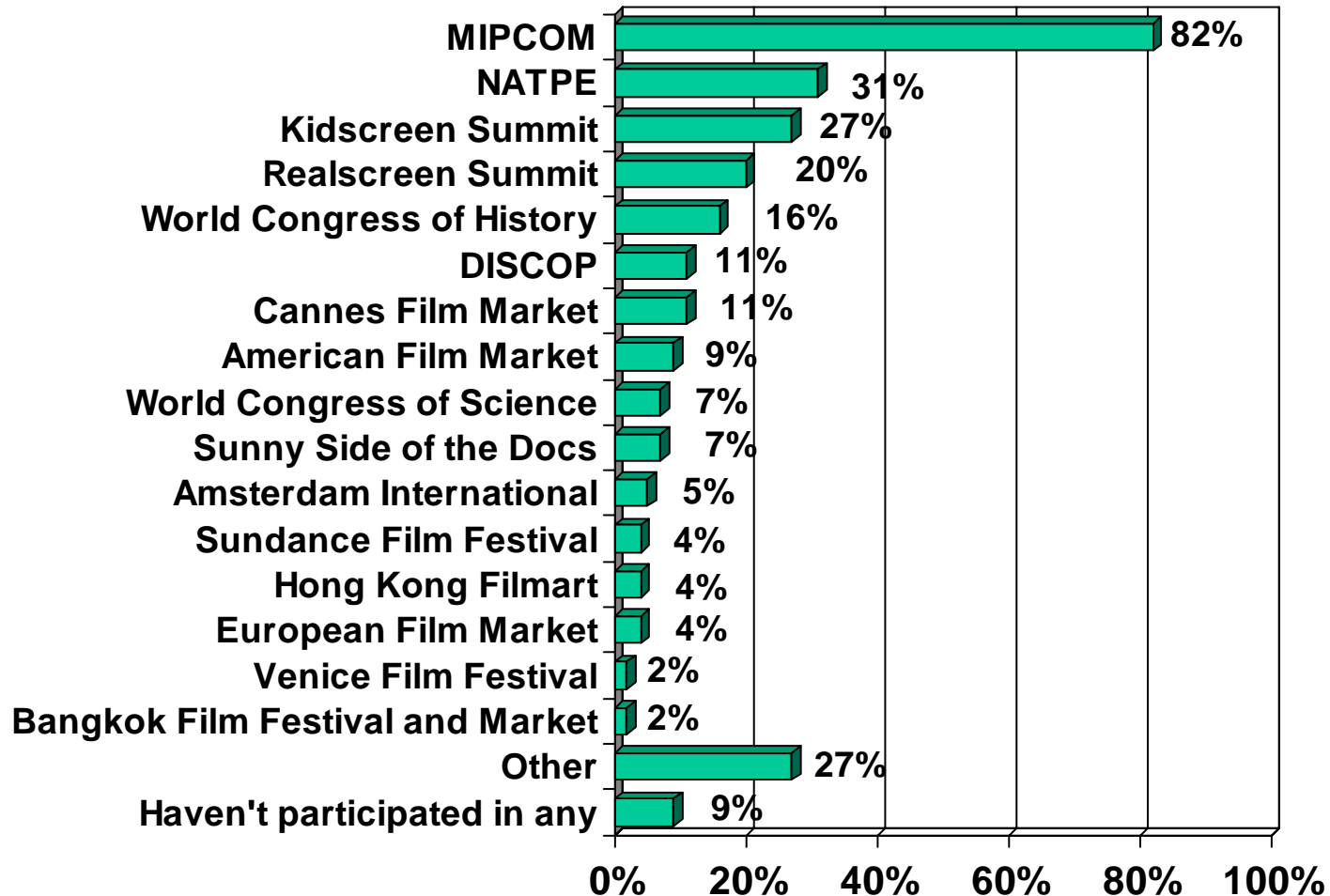


Q13c. How satisfied were you with the 2006 International Television Programme Market in terms of meeting the following objectives for attending, using a scale from 1 to 10, where 1 means not at all satisfied, and 10 means very satisfied. If a particular item does not apply, select, "not applicable".



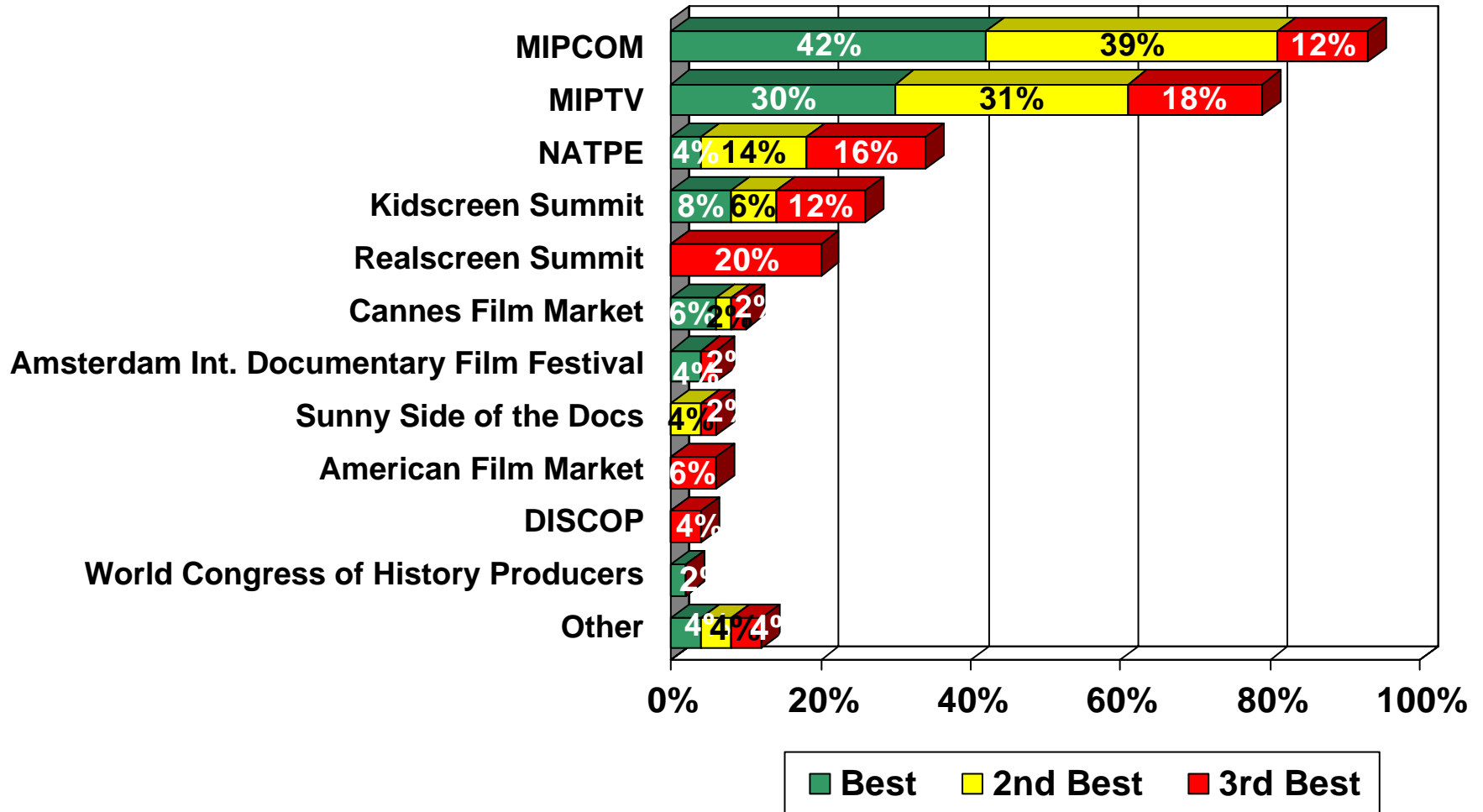
N=55

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

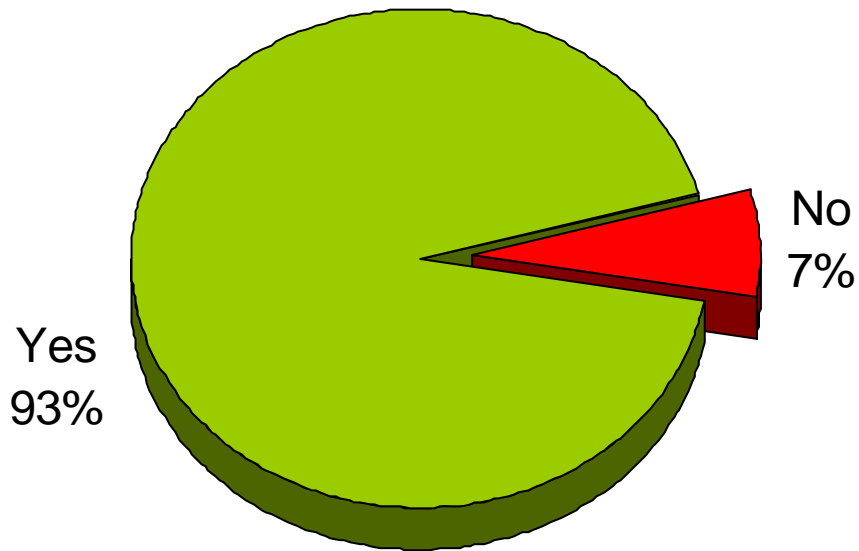


Q15 Thinking of MIPTV together with the other major international events held outside of Canada, which one best meets your needs, is second best at meeting your needs, is third best at meeting your needs?



N=49

Used Services of Canada Pavilion?



WHY NOT?

- *“Even though we took a semi-private lounge on the Canada Pavilion it turned out that we didn't really need it as we were buying and spent the majority of our time at other companies' booths.”*
- *“Pas requis”*
- *“Pas utile”*

Q17 Did you use the services provided by the Canada Pavilion at the 2006 International Television Programme Market? N=54

Q18 (IF “NO” TO Q17) Why didn't you use the services provided at the Canada Pavilion? N=4



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 International Television Programme Market (MIPTV) 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=50



Suggestions for Future Improvements to the Canada Pavilion

➔ **Suggestions for improvements primarily concerned better signage, more space, or a change of location for the stand to ensure greater exposure.**

- *“Our only suggestion as to improving it would be to have more chairs and seating room in the open meeting area.”*
- *“A few more tables in the Shared Business Lounges, and a new option providing for two tables for one exhibiting company without shared TV/DVD player at same cost as Shared Business Lounge, to accommodate 2 registrants”*
- *“A better location would be great. More emphasis on the front of the booth with multi-purpose meeting areas that are not pre-assigned.”*

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. N=50



Suggestions for Future Improvements to the Canada Pavilion

- *“More signage throughout the Pavilion, more exposure in any way possible”*
- *“The print on the sign (card) is very small and appointments had to come in and look around to spot them. Perhaps bigger letters would help.”*
- *“There was some confusion as our booth was not in the main pavilion but was down the hall and therefore many of our meetings arrived late because of misunderstandings of our location. Not sure how to resolve this but just some signs or maps that give details at the front desk of where each production company is located, might help.”*
- *“A redesign of stand could give producers more exposure to foot traffic.”*

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. N=49



Suggestions for Future Improvements to the Canada Pavilion

- *“An effort has been made to provide more holders for flyers which helped greatly but still it wasn't enough. Apart from our scheduled meetings we need exposure for our product to the walk by clients to enhance sales potential.”*
- *“Change location to the Riviera area”*
- *“Location for the Canada Pavilion in France is claustrophobic and is split into multiple areas perhaps it is time to find a new location for all Canadian participants to be together”*
- *“It would be great to be in Section R (or equivalent) where there is light, fresh air and high ceilings. It would be better if the meeting spaces were slightly larger”*

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. N=49



Suggestions for Future Improvements to the Canada Pavilion

- ➔ **A couple of respondents talked about technical difficulties while two others mentioned the cost of participating.**
- *“We had some issues with the DVD player, and the way the aspect ratio appeared on some of our DVD's”*
 - *“I would like to make sure the wireless works on all spots of the pavilion, as it did in the past, which did not happen this year. I would like to be able to achieve a little more by the cost we pay to be with the Pavilion (in decoration and space, etc.) Sometimes it would be nice to be able to personalize your space according to your company... beyond posters.”*
 - *“L'aire sous les escaliers est fort bruyant pour la tenue des rencontres”*

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. N=49



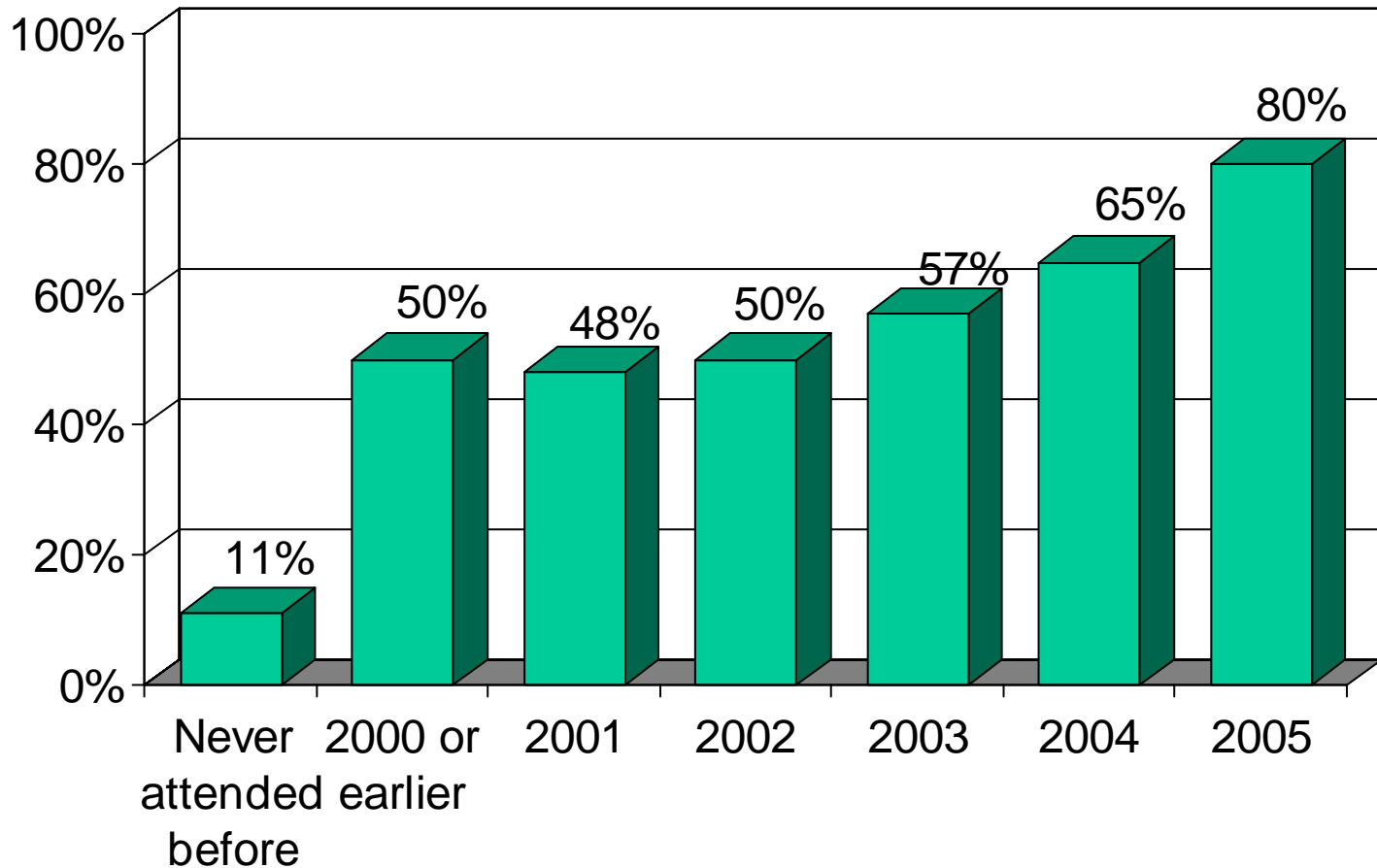
Suggestions for Future Improvements to the Canada Pavilion

- *“Les coûts sont trop élevé et plusieurs distributeurs m'ont exprimer leurs intention de regarder d'autres options!”*
- *“Very little improvement required. Staff & services offered were exceptional. My only concern would be the price for a shared meeting space. There was a significant increase in price and as a small company, it really affected our budget. So much so that we could only send 1 rep from our company rather than 2.”*
- *“Provide lockers with keys”*

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. N=49



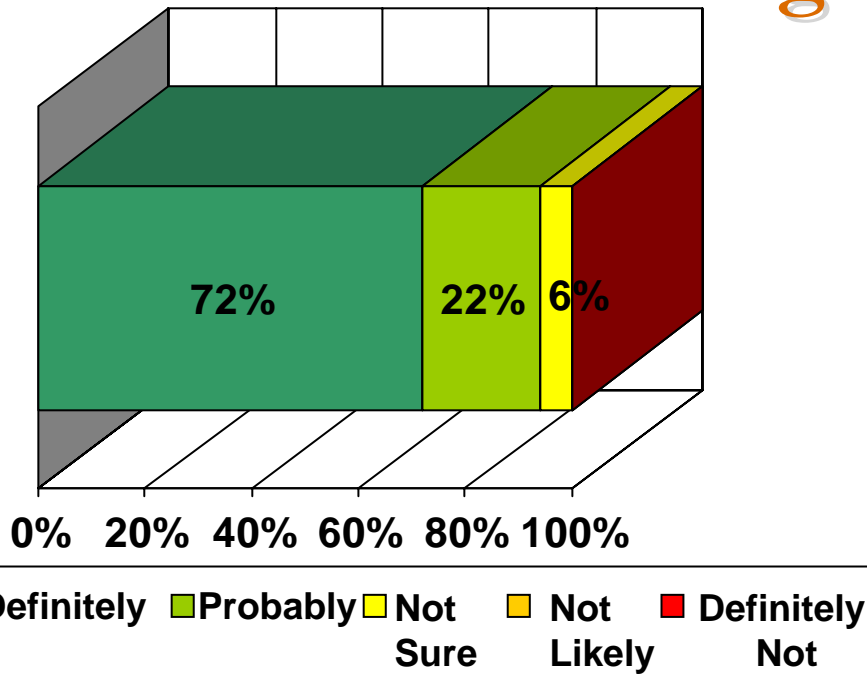
Past Attendance at MIPTV



Q21. Which previous International Television Programme Markets (MIPTV), if any, has your company attended? *Select all that apply*

N=54

Likelihood of, and Reasons for, Recommending MIPTV to Others



- *“Excellent meeting place for broadcasters and distributors from the international community.”*
- *“A great opportunity for smaller CDN companies to create some int'l exposure re: their programming.”*
- *“Cela dépend d l'envergure des projets a mettre en place et de l'entreprise au niveau international car la grosseur de l'événement fait en sorte qu'il est difficile d'obtenir des rendez-vous”*
- *“C'est un must pour qui fait de l'international”*

- *“C'est le plus grand marché de télévision au monde. Il faut y etre autant pour mousser son entreprise que pour connaitre les tendances a venir.”*

Q22a. Would you recommend the International Television Programme Market (MIPTV) to other companies in the Canadian audio-visual industry? N=54

Q22b. Please explain your answer. N=51



Reasons for Recommending MIPTV to Others

- *“I found the Canada Pavilion to be an economical, yet also highly functional option for attending the market.”*
- *“It depends on the situation of the company. I would definitely market it to distribution companies as being a complete necessity. However, for other service or production companies, they may benefit from attending only one MIP per year and coupling it with other markets targeted directly to their product.”*
- *“It is the best venue to meet buyers and see what is available in the TV market.”*
- *“It is vital for Canadians to have a unified presence at key international markets. The Canada stand gives our entire industry a professional image and edge.”*



Q22b. Please explain your answer.

Cost of Attending MIPTV 2006

- Companies incurred an average cost of \$14,812 in attending MIPTV 2006
- 19% of respondents (10 companies) indicated that they received funding support from Telefilm, other federal government organizations or the provincial funding agencies to attend the event.
- Only one company reported receiving federal funding (in the amount of \$4,000).
- Four companies provided details of the provincial funding they received. These companies received an average of \$3346.50 in provincial funding.

Other Comments

- *“Any support for us is very helpful as I believe it is more than paid back with employment opportunities inside Canada to help us keep work in Canada in a market that relies on global profile and sales when competing with quality, creativity and cost in an expanding global market.”*
- *“This is probably one of the most beneficial of ALL the programs Telefilm Canada participates in or organizes. It should continue and the costs should try to remain as low as possible if Canadians are going to make progress as exporters of programming. Thank you.”*
- *“Nothing but wonderful things to say about the individuals working with Telefilm and representing them at the market. Everyone is extremely helpful, organized and supportive. Very much appreciated.”*

Q26. Finally, please provide any other comments you have on the 2006 International Television Programme Market or suggestions for improving the support provided by Telefilm and its partners. N=54



Other Comments

- *“Other than the cost of my exhibit area (as noted in my previous comments), I was most pleased with the Telefilm services offered at MIPTV. I would like to take this opportunity to thank all staff that worked in the Canada Pavilion. They were extremely professional and went out of their way to accommodate all CDN distributors/producers exhibiting in the Canada Pavilion.”*
- *“I think they are doing a wonderful job, but we did notice a huge change in fees and costs. As it sits now, we could consider the possibility of taking an independent stand for the same costs. It is important to keep in mind that TFC is supposed to support the industry not only in service, but in achieving deals with providers that are good for everyone, in all the markets. That is the only way the industry will grow for real. It is more and more an international marketplace and closing up to only Canadian production and format of production and distribution is not working anymore.”*

Q26. Finally, please provide any other comments you have on the 2006 International Television Programme Market or suggestions for improving the support provided by Telefilm and its partners. N=54



Other Comments

- *“I appreciated wireless and of course liked it when it cost less.”*
- *“More advance notice to Canada Pavilion distributors as to confirmed networking Cocktail parties sponsored by Telefilm, so that more broadcasters can be invited, successfully.”*
- *“It would be great to have more choices of lunch kiosks - with more variety in the menus. When you don't have time to leave the pavilion, the same menu everyday is tedious. The Canadian pavilion should also provide the option of tea in addition to the current coffee option.”*
- *“Pourquoi horizon Québec ne serait pas annexé ou tout pret de Téléfilm... Ce serait un atout certain pour les deux!!!”*



Q26. Finally, please provide any other comments you have on the 2006 International Television Programme Market or suggestions for improving the support provided by Telefilm and its partners. N=54