NEW APPROACHES FOR GREATER DIVERSITY
OF CINEMA IN EUROPE?

ANALYSES OF EXPERIMENTS LAUNCHED IN THE CONTEXT
"CIRCULATION OF FILMS IN THE DIGITAL ERA"
(EUROPEAN PARLIAMENT AND EUROPEAN COMMISSION)

Preparatory action - waves 1 & 2

Thomas Paris
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1 Preparatory action participants:

IFFR LIVE coordinated by the International Film Festival Rotterdam
SPIDE coordinated by L’ARP, Société des Auteurs-Réalisateurs-Producteurs.
STREAMS DAY-AND-DATE coordinated by EuroVOD
New approaches for greater diversity of cinema in Europe?

Analyses of experiments launched in the context of the preparatory action
"Circulation of films in the digital era"
(European Parliament and European Commission)

Thomas Paris¹

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Introduction

Digital technology, new forms of film distribution and consumption, piracy, the growing saturation of screens and the arrival of new economic players are some of the factors which are transforming the world of cinema. The European Parliament has launched a Preparatory Action, "Circulation of European Films in the Digital Era," a series of experiments to turn these threats into opportunities, with the aim of improving the circulation of films in Europe. A first initiative (voted on 26th of October, 2011), then a second, aimed to experiment with new film distribution channels in Europe through simultaneous or quasi-simultaneous releases in several territories. The goal was to learn and understand - this is the meaning of an 'experiment' - with no bias other than that of seeing the new film distribution channels, whatever risks they may involve, as a potential source of opportunities.

These experiments, led by several different players in the European film industry, resulted in several film releases using innovative types of distribution, with a multi-country dynamic. While there have been more and more spontaneous experiments over recent years (mainly in the United States and in the United Kingdom) on simultaneous cinema theatre-VOD (Day-and-Date) releases, VOD pre-releases (ultra-VOD), or exclusively VOD releases (Direct-to-VOD), experimentation driven by the European Parliament has endeavoured to include the multi-territorial dimension, to encourage the simultaneous release of films in several European countries.

Table 1: projects launched in the context of preparatory action 2

<table>
<thead>
<tr>
<th>Projects</th>
<th>Companies and organisations</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFFR LIVE</td>
<td>IFFR (f), Distrify (ag; dd), Doc &amp; Film (is), Fortissimo (is), Filmin (ag; dd), Trustnordisk (is).</td>
</tr>
<tr>
<td>SPIDE</td>
<td>L’ARP (po), Autlook (is), BIM Distribuzione (d), Celluloid (is), Europa Distribution (op), Elle Driver (is), Fandango (is), FilmoTV (dd), IPEDA (op), Kinology (is), Premium Films (is), Protagonist (is), Under the Milky Way (ag.), Versatile (is), Vertigo (d), Wide (is), Wild Bunch (is), Wild Bunch Distribution (d), Wild Side Vidéo (ag; d), Wild Bunch Germany (d), associate partner: The Film Agency (ma).</td>
</tr>
<tr>
<td>STREAMS DAY-AND-DATE</td>
<td>EuroVod (po), Memento Films International (is), Doc &amp; Film International (is), The Match Factory (is).</td>
</tr>
</tbody>
</table>

ag.: VOD aggregator, d: distributor, dd: digital distributor, f: festival, is: international sales, ma: marketing agency, po: professional organization
These experiments have led to the distribution of 23 films to date, in 22 European countries, totalling 112 releases, 39 of them on a Day-and Date (D&D) or Ultra-VOD basis and 21 on a Direct-to-VOD or e-cinema basis.

**Figure 1: the experiments in practice**

### 23 FILMS

- *Viramundo*
- *Prezencia Magica* (Portugal)
- *For Those In Peril* (UK)
- *After the Night* (Ireland)
- *The Spirit of ’45* (Spain)
- *Jimmy P* (US)
- *Mademoiselle C* (France)
- *Iosomi* (Japan)
- *Bastards* (France)
- *Welcome to New York* (US)
- *Master of the Universe* (UK)
- *Adieu Au Langage* (France)
- *Under the Rainbow* (Ireland)
- *Like an Open Sky* (UK)
- *White Shadow* (USA)
- *The Sky Above Us* (Canada)
- *Love Battles* (Canada)
- *Atlantic* (UK)
- *Erbarme Dich* (Germany)
- *Speed Walking* (UK)
- *Melow* (UK)
- *Eat Your Bones* (UK)
- *The Keeper of Lost Causes* (UK)

### 22 TERRITORIES - Multi-territorial Dimension

- Austria
- Belgium
- Bosnia-Herzegovina
- Bulgaria
- Czech Republic
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Lithuania
- Luxembourg
- Netherlands
- Poland
- Portugal
- Romania
- Serbia
- Slovakia
- Slovenia
- Spain
- United-Kingdom

### 133 RELEASES - Multi-platform Dimension

- 112 Day-and-date releases or quasi Day-and-date releases
- 21 Direct-to-VOD or e-cinema releases

The aim of this independent report is to spark a discussion, based on the results of these experiments, on the potential benefits of these new distribution channels for European films in the digital era, in particular in terms of the complementarity of the media, the accessibility of films to audiences and of audiences to films.
In 2015, the cinema will be celebrating its 120th birthday on 28 December, exactly 120 years after the Lumière brothers offered spectators the opportunity to pay for an admission ticket to see a film projected on the big screen. This date, which is considered the creation of cinema, also saw the birth of its economic model. This model has lasted and has gained momentum over time, to the extent that collective distribution forms part of the very nature of the cinematographic opus.

Another less familiar date is equally important in the economic history of the cinema. On 17 January 1984, the Supreme Court of the United States pronounced its ruling in Sony vs Universal, dubbed the "Betamax case": recording television programmes did not constitute an infringement of copyright. This paved the way for the development of VHS equipment use, and a few years later, video cassette sales would account for a large proportion of the large studios' income.

The first date marks the emergence of the economic model consubstantial to the cinema. The second was not a remarkable date in itself, but rather because it paved the way for the demonstration of complementarity among different types of film consumption. Although Universal and the other leaders feared that the VHS would damage their revenues by cannibalising film theatres, what happened next showed them that the two types of consumption could coexist. It showed that their initial fears were unfounded because videos themselves soon generated more income than cinema theatres.

It would be dangerous to try and extrapolate this story to the current context: the emergence and development of electronic distribution in its different formats (VOD, Day&Date, Direct-to-VOD, UltraVOD, SVOD, eCinema) is considerably different.
The lesson here is that different types of film consumption are not in head-to-head competition with one another. The arrival of a new distribution channel may unsettle the existing economic balances, but it will not necessarily wholly replace an existing one. What we intend to highlight here are the determining factors in this balance between substitutability and complementarity.

There are three determining factors: the complementarity of distribution channels is defined based on parameters of differentiation, in the user experience and types of consumption; it is also defined from the point of view of the rights holder, where films more or less undergo "switching" (in the sense of railway points); it is finally defined around complementarity in terms of promotion. We will discuss each of these elements in turn. First some background, which will enable us to better understand the challenges surrounding these questions of complementarity. These elements are drawn from the previous report².

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1.1. Limited film circulation and access to exposure

The market for films faces two underlying trends which raise questions as to its evolution. These trends originate in two long-term processes, globalisation and the implementation of digital technologies, which have impacts on access to screens for films and changes in consumption habits.

Globalisation in cinema leads to the coexistence of two economies in the different countries: on one hand a "global" cinema, which is essentially Hollywood-based and derives its revenues from multi-national releases backed by massive advertising campaigns; on the other hand films that are confined to their national markets, with comparatively minuscule resources. This coexistence leads to an inherently unequal competition for access to screens and promotional visibility.

National box-office receipts, in countries that still have a film industry, are thus divided between American blockbusters, present in all countries, and local films, often restricted to a domestic market. We should also mention art-house films, which have an international audience: due to their limited potential at a national level, these films face difficulties in obtaining access to theatres in all of the countries where they are distributed.

| Table 2: Average national market share, in terms of admissions, in the European Union, in 2012 (AEO data) |
| American films (or with an American partner) | 63.1% |
| Non-national European films | 12.5% |

| Table 3: degree of concentration of admissions for American and European films |
| Share of European admissions in a single country | Share of European admissions in three countries |
| American films (or with an American partner) | 26.65 % | 56.37 % |
| European films (no American partner) | 69.33 % | 85.78 % |

Globalisation thus leads to the creation of a dual economy, in which European films enjoy only limited circulation.

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3 Market share in top three countries, in terms of admissions.
Added to this is the concentration of film showings (number of screens per film) and the growing increase in the number of films distributed, which combine to limit the possibilities of screening for a large number of films, mainly those in the second category.

The saturation of cinema screens is determined by infrastructure limitations (the theoretical maximum potential for exploitation of a film depends on the total number of screenings offered in a given zone), but above all by programming habits, which involve unity of programming of one film per week on one screen\(^4\), and programming with a certain number of prints over several weeks. Once films which enjoy widespread exposure have been programmed, little room remains for the others.

The number of films on exclusive first release is increasing, with a rise for example from 400 to over 600 in France between 1996 and 2013, or 600 to 650 in the UK between 2007 and 2012. This increase leads to greater pressure on theatres, which in turn makes it difficult for some films to obtain access to adequate exposure. This causes a decreased life cycle for films\(^5\), and a decrease in the number of screens available for less visible films. In the UK, 35% to 40% of films distributed between 2007 and 2012 had fewer than 10 prints in circulation. In France, non-national European films were screened in 60 to 110 theatres on average between 2003 and 2012.

In general, the offering accessible for an individual depends, in qualitative terms, on their country of residence. The inhabitant of a "small" country will have access to a much more restricted choice of films than the inhabitant of a more populated country, even when the country offers a large number of films per inhabitant.

\(^4\) This habit has been partly called into question by the development of multiprogramming which enables some films to share a screen while others, with greater potential, can be programmed on several screens in a multi-screen complex.

\(^5\) "Durée de vie des films en salles", CNC, July 2008
Table 4: Number of exclusive first releases in a few European territories.

<table>
<thead>
<tr>
<th>Country</th>
<th>Inhabitants (M)</th>
<th>Films distributed as exclusive first releases (2012)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>83</td>
<td>551</td>
</tr>
<tr>
<td>UK (+ Eire)</td>
<td>67</td>
<td>647</td>
</tr>
<tr>
<td>France</td>
<td>66</td>
<td>615</td>
</tr>
<tr>
<td>Italy</td>
<td>61</td>
<td>363</td>
</tr>
<tr>
<td>Spain</td>
<td>47</td>
<td>472</td>
</tr>
<tr>
<td>Romania</td>
<td>22</td>
<td>186</td>
</tr>
<tr>
<td>Netherlands</td>
<td>17</td>
<td>406</td>
</tr>
<tr>
<td>Portugal</td>
<td>11</td>
<td>264</td>
</tr>
<tr>
<td>Sweden</td>
<td>10</td>
<td>217</td>
</tr>
<tr>
<td>Denmark</td>
<td>6</td>
<td>231</td>
</tr>
</tbody>
</table>

It depends even more strongly where they live, because for all of these countries the available offering is linked to the size of the local markets. 14% of the European population has no cinema within 30 minutes of home (the figure is as high as 37% in Romania)\(^7\).

The offering available falls off very sharply between the capital and other large cities, as the following examples show.

Figure 2: films distributed in Spain in 2012\(^8\)

\(^6\) 2010 figures
\(^7\) 11 Attentional, Headway International and Harris Interactive (2014).
\(^8\) total number of films, exclusive first releases and others. Source: Ministerio de Educación, Cultura y Deporte. Instituto de Cinematografía y de las Artes Audiovisuales. Estadística de Cinematografía: Producción, Exhibición, Distribución y Fomento.
On a European scale, the variation in the accessible offering from one area to another works mainly to the detriment of third-country films (neither national nor American) and domestic films. In the territories of the previous sample the number of films distributed varies in the ratio of 1 to 3 from one territory to another, but for American films the ratio is only 1 to 2. It is true that the number of domestic films varies from 10 to 1, but this is linked to differences in national production potential.

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9 Exclusive first releases. CNC data.
10 Exclusive first release or subsequent release. Source: Cinetel.
Figure 5: number of films distributed in 2012. by nationality, in a few European countries

These figures highlight a structural obstacle to the distribution in theatres of certain films, including European films for which the ability to circulate from one territory to another is limited by effective distribution capacity. This gives European cinema-goers the impression that their choice is curtailed. A recent study by the European Commission recently showed that 30% of the people questioned and who were free down-loaders used the Internet because many of the films they wanted to see were simply not available in their country.

These figures should be compared with those for production. 1,299 films were produced in the European Union in 2012, and 200 American films were distributed there.

11 Sources: FFA, BFI, CNC, Ministero dei beni e delle attivita' culturali e del turismo, ICAA, CNC (Romania), Nederlands Film Fonds, ICA, Swedish Film Institute, Danish Film Institute.
13 Source: FOCUS 2013.
Table 5: capacity for film distribution in Europe

<table>
<thead>
<tr>
<th>Available films (annual European production + American films distributed)</th>
<th>1,500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution capacity (maximum number of films distributed in European cities)</td>
<td>650</td>
</tr>
<tr>
<td>Distribution capacity for third-country films (after deduction of American films and domestic films)</td>
<td>290</td>
</tr>
</tbody>
</table>

While the debate on the cultural obstacles to the international circulation of films is outside the scope of this paper, we can safely say that these obstacles are very strong and that, simply because more films are being produced, they affect a growing number of films.

### 1.2. Parameters for differentiating between types of consumption

The complementary nature of different film distribution channels is due to both differentiation of the user experience and “consumer” segmentation. VHS did not kill the cinema because consumers see them as very different. The collective dimension of theatres is often seen as an inherent quality of the cinema. This is one factor in differentiation, but it is not the only one. Video comes out ahead on other points, which explains how theatres and video can coexist. While theatres offer a higher-quality show, consuming films at home is more flexible and does away with a whole series of logistical issues, in particular for families with children. Video did not kill the theatre because they are very different types of distribution, so neither one can fully eclipse the other. Some viewers did stop going to see films in theatres because videos offered them a solution which was a better overall fit. On the other hand, people who never went to the cinema started watching films at home. And others, doubtless the majority, split their film consumption between theatres and home, depending on the occasion and the film in question.

More generally, the different types of film consumption highlight a series of differentiation variables.
Table 6: Differentiation parameters for film distribution channels

<table>
<thead>
<tr>
<th>Variables</th>
<th>Possible values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place of consumption</td>
<td>Theatre / Home / On-the-go</td>
</tr>
<tr>
<td>Consumer unit</td>
<td>Individual / Family / Collective</td>
</tr>
<tr>
<td>Projection quality</td>
<td>Screen size, sound system</td>
</tr>
<tr>
<td>Consumption temporality</td>
<td>Linear / non linear</td>
</tr>
<tr>
<td>Breadth of offer</td>
<td>Broad or not, legally restricted or not</td>
</tr>
<tr>
<td>Payment</td>
<td>Subscription / unit / third party</td>
</tr>
<tr>
<td>Price</td>
<td></td>
</tr>
</tbody>
</table>

Some of these variables are inherent to the distribution channel, others are conventional, and others are legal. The restriction of the offer calls to mind the mechanisms of media chronology: this variable, imposed by legal systems or professional agreements, affects the type of films that each distribution channel can offer at a given time. A conventional variable is, for example, the fact that cinema has historically been paid for by the unit. The invention of unlimited passes has called into question the unicity of this model. Cinema financed by a third party - advertising for example - does not currently exist, but could be developed in the future.

These different variables enable us to examine the difference between the different types of film consumption.

Table 7: Characterisation of film distribution channels

<table>
<thead>
<tr>
<th>Place</th>
<th>Quality</th>
<th>Temporality</th>
<th>Breadth of offer</th>
<th>Restrictions</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theatre</td>
<td>Theatre</td>
<td>Maximum</td>
<td>Linear</td>
<td>Limited</td>
<td>None</td>
</tr>
<tr>
<td>Free TV</td>
<td>Home</td>
<td>Average</td>
<td>Linear</td>
<td>Limited</td>
<td>&gt; x₁ month</td>
</tr>
<tr>
<td>Fee-paying TV</td>
<td>Home</td>
<td>Average</td>
<td>Linear</td>
<td>Limited</td>
<td>&gt; x₄ month</td>
</tr>
<tr>
<td>Video</td>
<td>Home</td>
<td>Average</td>
<td>Delinearized</td>
<td>High</td>
<td>&gt; x₃ month</td>
</tr>
<tr>
<td>VOD</td>
<td>Home</td>
<td>Average</td>
<td>Delinearized</td>
<td>Unlimited</td>
<td>&gt; x₃ month</td>
</tr>
<tr>
<td>SVOD</td>
<td>Home</td>
<td>Average</td>
<td>Delinearized</td>
<td>High</td>
<td>&gt; x₄ month</td>
</tr>
<tr>
<td>Piracy</td>
<td>Home</td>
<td>Average</td>
<td>Delinearized</td>
<td>Unlimited</td>
<td>None</td>
</tr>
</tbody>
</table>

¹⁴ Payment by subscription is possible but is not compulsory.
¹⁵ For public TV, the licence fee can be considered a form of payment by a third party (the contributor).
This table highlights several phenomena. First, it allows us to grasp the drop in the physical video market: this distribution channel is completely dominated by VOD, i.e. it has qualities which are lower or equal on each variable. The offering is narrower because it is dependent on other users, access to films does not require two trips (to go get it and return it.)

If we leave aside the criterion of legality, which is not significant for all users, we can also clearly see why piracy is an important threat to all fee-paying distribution channels, with the possible exception of theatres, which offer a higher quality experience.

Finally, we can see more generally why different distribution channels are not in direct competition with one another, and have given rise, over time, to a superimposition of distribution channels instead of a substitution.

*Figure 6: changes in expenditure on different distribution channels for films in France (in constant €M)*

These differences in the nature of user experience offered by each distribution channel generate complementarity between the different distribution channels.

This complementarity does, however, involve the transfer of consumption from one channel to another. Establishing a balance between different distribution channels raises the issue of the economic viability of the different channels as well as specialisation by film categories. These two questions can only find their answers in experience.
1.3. Complementarity in the creation economy: an economy of abundance

The complementarity of distribution channels can be examined from another angle, the perspective of the economics of creation. The creation economy has several particularities\(^\text{16}\). Structurally, it is an economy of abundance and selectivity. Many projects are put forward, some of which are developed by established organisations. Of the projects that are launched, only a limited few enjoy a certain level of visibility and distribution, and only some of those will have a large audience. This is the principle of superstars or\(^\text{17}\) long tail economics\(^\text{18}\). This successive funnel structure can be found in publishing, music, perfume, video games, and more generally in all creative industries. Some of these sectors have no difficulty in outsourcing the risks of over-abundance: in publishing, huge numbers of aspiring writers produce manuscripts, which are sent to publishing houses. This type of procedure is based on the intrinsic uncertainty involved in creative activities - it is impossible to predict the success of a product - which is amplified by the difficulty of forming an idea of the quality of a product before it is complete. The classical creation economy is based on the fact that each step in the chain involves a high level of selection from contributors to the value chain, who serve as gatekeepers: an editor makes a choice from among many manuscripts, a bookseller selects those he wants to highlight from the many books received, the media choose those they will discuss later from among the many books sold by booksellers. It is this process of successive selection, ultimately completed by consumers, which builds the value of works.

The quasi-necessity of launching a large number of projects must take the structural characteristics of each sector into account. In cinema, production costs make it virtually impossible to outsource this abundance. The sector thus finances huge numbers of projects. However the institutional acceptance of "abandoning" projects during the process, which is inherent to certain creative sectors, comes into conflict with the sums invested. While publishing incorporates the fact that manuscripts may never see the light of day, or that


published books may not have any visibility in the media or in stores, the levels of investment required for a film make this situation unacceptable. The cinema industry must therefore take this paradoxical situation in stride: on the one hand, the normality of the fact that different players involved in the chain should make a selection, starting with distributors and exhibitors; and on the other, the challenge of giving every film a chance, in view of the sums invested\(^{19}\). Put another way, exhibitors' work on programming, and upstream, the work of distributors, involve making choices which may lead to the inaccessibility of certain films in the theatre, despite the fact that they cost large sums of money.

The "switching" of films to distribution in theatres, VOD or even on television, is a solution to this dual constraint. Although it is difficult to get an idea of the potential of films based on a screenplay or a script, it is much easier once they are finished and they have begun to be shown. The decision to market a film through an alternative channel may therefore either require arbitration, for rights holders, given the estimated potential of the film, or be a solution for these same rights holders with a film which would not have access - or only very limited access - to theatres.

When arbitration is required, two factors enter into consideration: the recognition that comes from being screened in theatres and the comparative profitability of the different distribution channels. Let us examine the latter. To properly separate these two factors, one must exclude the "sum of investment in promotion" variable from the analysis, by considering that it will have the same impact for a cinema release or for digital distribution\(^{20}\). Economic arbitration is then based on the takings alone. For theatre exhibition, the share which goes to distributors is the sales price including tax, from which the taxes and the share kept by the exhibitors are deducted. In France, for example, the average net remuneration for distributors was 38% of the ticket price in 2010.\(^{21}\). For digital exploitation, the distributor's share is calculated based on a contractual agreement, generally around 70% to 80%.

\(^{19}\) added to this challenge is the issue of diversity, which suggests that the public should have access to a varied offering.

\(^{20}\) This is an initial approximation, insofar as the theatre plays an important role as an opinion leader

\(^{21}\) "Mission sur la transparence de la filière cinématographique - La relation entre le producteur et ses mandataires", Michel Gomez, report, September 2011.
<table>
<thead>
<tr>
<th></th>
<th>Theatre showings</th>
<th>Digital exploitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sale price incl. tax</td>
<td>€6.50</td>
<td>€8-12</td>
</tr>
<tr>
<td>Distributors’ share excl. tax</td>
<td>€2.50</td>
<td>€5-8</td>
</tr>
</tbody>
</table>

The distributor’s revenues may therefore be double or triple the revenues for theatre exhibition given the current market. This translates into a breakeven point differential which grows quickly as a function of the fixed costs invested in purchase of rights (MG) and promotion (P&A).

Figure 7: breakeven point for theatre exhibition and e-cinema as function of fixed costs

Today, by choosing direct economic profitability as the sole criterion, the conditions of arbitration favour direct exploitation through VOD, which can create pressure on alternative types of exploitation, and which looks likely to increase with this form of exploitation becoming standard. While arbitration of this kind is currently often biased by the exclusive nature of cinema release, this will doubtless change over time: as it becomes more common, not screening a film in theatres will create less stigma.

Furthermore, consumers today are still relatively unused to e-cinema, which is the direct release of films to VOD accompanied by a strong advertising campaign, which makes marketing investment more risky. Distributors define the level of expenditure on a release based on the expected audience. Direct digital exploitation is therefore a vicious circle: a
limited estimated potential leads to limited expenditure, with sales to a limited audience. There is another dimension to take into consideration in this vicious circle, which is due to the nature of culture itself. For consumers, the value of a production is linked to a network effect: it depends on the value that others give to it. This implies that a film with an audience which is considered small will lose its attraction to consumers. Therefore, the perception of a film exhibited through e-cinema as being marginal will partly be confirmed by the facts. When consumers feel that an e-cinema film could be seen by a large audience, it might gain value as a result. If e-cinema takes hold, it will make its reputation and may be seen by consumers as a distribution channel like any other, no longer just for second-rate films. The recognition of TV series as productions in their own right, although they are only broadcast on television, has demonstrated this effect.

Nevertheless, de facto specialisation by type of production may be expected. This is already partly under way: linear television has tended, for the past few years, to prioritise special events programmes, and the cinema offering seems to be focused on making Hollywood "sequel and children's films. In 2014, the 30 top films at the French box office included 8 French family comedies, 8 sequels of Hollywood franchises and 4 animated films. On the scale of the European Union, the top 20 films at the box office for 2014 included 9 sequels.

This specialisation results from both the actual economic choices made by distributors and choices made by default when their films do not have access to satisfactory distribution in theatres. The analysis of Day&Date releases (hereinafter D&D) in the United Kingdom for the past several years highlights this kind of specialisation: this distribution channel is used for specific types of film.

The United Kingdom has experimented with D&D releases since the middle of the 2010s, with the trend taking off starting in 2013. We have identified 205 releases of this kind.
Analysis of the list of films concerned reveals several trends which demonstrate that this type of release has started to focus on certain types of film:

- documentaries account for 28% of these releases (up from 20% in the first years);

- films shown at festivals: 48% on average,

- European films (non-UK): 43% on average.

Conversely, American films and comedies were initially released this way (respectively 21% and 21% of releases), but now only account for a negligible share (5% and 5%) of releases. D&D is gradually being consolidated as a distribution channel for non-national European and art-house films, with a significant share of documentaries.
The following points should be noted. The different distribution channels appear to be complementary in terms of the cinema economy. Each film, which is a unique creation, has its own economics: its cost, its estimated potential, and the extent of its access to theatre screenings could lead its distributor to opt for an alternative distribution channel when faced with a more or less restricted choice: directly to electronic format (e-cinema or Direct-to-VOD) or a simultaneous theatre and VOD release (D&D). The economic equation of direct revenues is an aspect of this choice: it is not the only one, in particular due to the recognition that distribution in theatres still confers today, and will no doubt continue to confer in the years to come. When the choice of a simultaneous release is made, it is intended to maximise the audience, due to limited access to theatres. Complementarity is in this case based on a third factor, which we will address in the next part.

1.4. Complementarity in promotion

A third type of complementarity among distribution channels may arise due to the superimposition of the two geographies in which films evolve: a geography of distribution and a geography of promotion.

The geography of in-theatre film distribution is discrete, in the mathematical sense, meaning that it comprises a sum of areas which do not cover an entire territory. Rights are acquired on a national level: an operator has the prerogative to market the film in theatres to the entire population of a country. But the effective coverage provided by the operator depends on both the locations of theatres and the actual placement of the film. In the best scenario, the operator will be able to offer the films to people living in all of the country's cinema theatre catchment areas.

The geography of promotion is different. It comprises central promotion, which goes through the opinion leaders which reach the entire country (TV, radio, press, Internet, and to a lesser extent, billboards). Most promotional expenditures are made on a national level, more or less homogeneously, independent of the places where the films are actually screened. In addition to central promotion, which is managed by the national rights holders, local promotion is handled by the theatres themselves; it is at best of very limited scope. In
most countries, promotion mainly occurs at a national level. There is therefore a disconnect between the geography of how films are promoted and how they are actually distributed.

Promotional efforts, in terms of space purchases, are defined on the basis of the number of distribution locations. Reduced promotional costs do not lead to better targeting of promotional efforts, but simply to a reduced effort nationwide. Therefore the proportionality of promotional expenditure as a function of the number of screens does not exist at the local level. A low number of screens simply means a proportionately low marketing effort nationwide, including in areas where the film is not shown at all.

At theatre level, the visibility of a film generated by the distributor's promotion is not proportional to the sums invested. There is a critical mass effect.

In France, for example, 42% of urban areas have theatres\textsuperscript{22}. The sums invested in space purchases vary based on the number of prints.

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure8.png}
\caption{Purchases of space (in €M), as a function of the number of prints\textsuperscript{23}}
\end{figure}

\textsuperscript{22} “La géographie du cinéma”, CNC files, no.331, September 2014.
Figure 9: relative impact of 1 Euro invested in promotion, as a function of the number of prints

This curve shows that an individual located in an urban area where the film is exhibited will be 8 times more likely to be exposed to promotion surrounding the film if 400 prints are released, than if 50 to 100 prints are released.

The dissociation between distribution, which is discrete, and promotion, which is homogeneous, leads to squeezed visibility for films distributed on a limited number of screens. To be visible, these theatres’ operators must generate their own promotion. Exhibitors may, depending on the films they show, settle for central promotion or develop local promotional efforts.

This creates a third form of complementarity, for theatres which do not enjoy nationwide promotion for a given film. Joint VOD distribution may involve an extra promotional effort which may increase the visibility of this film. As VOD distribution is homogeneous (reaching an entire country and not just certain areas), the potential audience covers the entire country. A high level of promotion may therefore mean high visibility for the films, and extra audiences in the theatres which show them.

The benefit for theatres of VOD distribution is therefore based on a balance between the effects of transferring from theatre spectators to VOD viewers, and the heightened visibility that promotion surrounding VOD distribution can provide.

---

This curve is based on an estimate of the population exposed to a film as a function of the number of prints (20% of the population for at least 10 prints and 42% for more than 400).
Let us consider a film which is being shown in a limited number of theatres.

$S$ is the number of spectators watching the film in a given theatre, without VOD distribution.

$P$ is the film’s promotional budget in the absence of VOD distribution; $\Delta P$ is the extra promotional effort created by VOD distribution.

$\Delta_1 S$ is the number of spectators who choose to see the film on VOD instead of in the theatre, in the given catchment area.

$\Delta_2 S$ is the number of extra spectators who are brought by the extra promotional effort to the theatre in question.

\[
\frac{\Delta_2 S}{S} = k_1 \times \frac{\Delta P}{P} \text{ with } k_1 \leq 1
\]

This reflects the fact that the extra promotional effort creates a surplus of spectators which is less than proportional: one may consider that the film’s initial spectators are less sensitive to promotion, because they make an effort to find out about it themselves.

\[
\frac{\Delta_1 S}{S} = k_2 \times \frac{P}{P_\infty}
\]

$k_2 \leq 1$ is the proportion of the film’s spectators who are likely to switch to VOD.

$P_\infty$ is the promotional effort which would mean that the entire theatre audience is informed of the VOD distribution.

For a theatre, the variation in the number of spectators resulting from VOD distribution is given by:

\[
\Delta S = \Delta_1 S - \Delta_2 S
\]

Whether the end result is positive or negative is unknown, and depends on the way in which the transfer of spectators to VOD and the increase in the number of theatre spectators due to the heightened visibility from VOD distribution interact. A VOD release with small-scale promotion would take away a few spectators from the theatre, but more promotion would bring new ones. The curve showing the growth of theatre audiences as a function of investment in promotion as a result of VOD distribution could therefore have the following shape:
1.5. Conclusion

This section aimed to examine the complementarity between different film distribution channels. We have shown that this question was not reduced to the mechanical effects of transfer of spectators (cannibalisation), but involved different components, the aggregation of which led to uncertain results. Although it is evident that electronic distribution will take away some spectators from theatres, the weight and the effect of this is much less clear. Distributors can find a way forward because VOD distribution offers them a way to make the most out of films which have little room in theatres, because the revenues lost from theatre distribution can be compensated for by VOD distribution.

As for theatres, at first glance they are the link most threatened by these new forms of exploitation, and it is important to avoid putting their finances in jeopardy. It is without a doubt art-house theatres which are the most vulnerable. Although their spectators may be less likely to switch to VOD, the films they distribute are the most likely be released simultaneously on VOD. Even a marginal loss of spectators may have a very detrimental

\[ \Delta S \]

\[ \Delta P \]

This hypothetical curve in no way reflects observed behaviour. The key to its real shape is based on the behaviour of \( k_1 \) and \( K_2 \). It also depends on the type of film, on which depend the extent of transfer to VOD (\( k_2 \)) and the transformation of the informed public into spectators (\( k_1 \)).

25 As a first approach, \( k_1 \) and \( k_2 \) may be considered as constants. In reality, they are doubtless constant when \( \Delta P \) is low, but they then change: this reflects the fact that the number of potential spectators is not infinite.
effect for theatres with fragile finances. However, analysis indicates that the overall effect is not necessarily negative: a loss of spectators due to VOD release may be counteracted by an increase in visibility. The respective weighting of these two effects is unknown, and would benefit from being tested. It also depends, as do the other parameters, on the types of film in question.
Experiments led within the context of Preparatory Actions 1 and 2 involved 23 films, which were released in 22 European countries.

**Countries involved in the experiment**

Austria, Belgium, Bosnia-Herzegovina, Bulgaria, Czech Republic, France, Germany, Greece, Hungary, Ireland, Italy, Lithuania, Luxembourg, the Netherlands, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain and the United Kingdom.

These releases involved 112 D&D or Ultra-VOD releases, and 21 Direct-to-VOD or e-cinema releases. 5 films from the Preparatory Action 2 were presented at the Rotterdam International Film Festival, before their commercial exploitation. These films were presented in 40 cinemas in 9 countries: Bosnia-Herzegovina, Italy, Luxembourg, the Netherlands, Poland, Serbia, Slovenia, Spain and the United Kingdom.
<table>
<thead>
<tr>
<th>Film</th>
<th>D&amp;D releases</th>
<th>Direct-to-VOD releases</th>
<th>e-cinema releases</th>
<th>Festival theatre + VOD distributions</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viramundo</td>
<td>Pierre-Yves Borgeaud, 2013 (F/Switzerland)</td>
<td>10</td>
<td></td>
<td></td>
<td>TIDE</td>
</tr>
<tr>
<td>For those in peril</td>
<td>Paul Wright, 2013 (UK)</td>
<td>5</td>
<td></td>
<td></td>
<td>TIDE</td>
</tr>
<tr>
<td>Magnifica presenza</td>
<td>Ferzan Özpetek, 2012 (I)</td>
<td>4</td>
<td></td>
<td></td>
<td>TIDE</td>
</tr>
<tr>
<td>After the Night</td>
<td>Basil Da Cunha, 2013 (Switzerland/Portugal)</td>
<td>4</td>
<td></td>
<td></td>
<td>TIDE</td>
</tr>
<tr>
<td>The Spirit of 45</td>
<td>Ken Loach, 2013 (UK)</td>
<td>4</td>
<td>1</td>
<td></td>
<td>Speed Bunch</td>
</tr>
<tr>
<td>Jimmy P.</td>
<td>Arnaud Desplechin, 2013 (F)</td>
<td>2</td>
<td>1</td>
<td></td>
<td>Speed Bunch</td>
</tr>
<tr>
<td>Mademoiselle C.</td>
<td>Fabien Constant, 2013 (F)</td>
<td>2</td>
<td>1</td>
<td></td>
<td>Speed Bunch</td>
</tr>
<tr>
<td>Welcome to New York</td>
<td>Abel Ferrara, 2014 (F/USA)</td>
<td>5</td>
<td></td>
<td></td>
<td>Speed Bunch</td>
</tr>
<tr>
<td>Io sono Li</td>
<td>Andrea Segre, 2011 (I)</td>
<td>5</td>
<td></td>
<td></td>
<td>EDAD</td>
</tr>
<tr>
<td>Bastards</td>
<td>Claire Denis, 2013 (F)</td>
<td>4</td>
<td></td>
<td></td>
<td>EDAD</td>
</tr>
<tr>
<td>Goodbye to Language</td>
<td>Jean-Luc Godard, 2014 (F/Switzerland)</td>
<td>3</td>
<td>1</td>
<td></td>
<td>Spide</td>
</tr>
<tr>
<td>Department Q : The Keeper of lost cause</td>
<td>Mikkel Norgaard, 2013 (D,G,S)</td>
<td>1</td>
<td>2</td>
<td></td>
<td>Spide</td>
</tr>
<tr>
<td>Master of the Universe</td>
<td>Marc Bauder, 2013 (G, A)</td>
<td>5</td>
<td></td>
<td></td>
<td>Spide</td>
</tr>
<tr>
<td>White Shadow</td>
<td>Noaz Deshe, 2013 (Tanzania, G, I)</td>
<td>6</td>
<td></td>
<td></td>
<td>Spide</td>
</tr>
<tr>
<td>Eat your bones</td>
<td>Jean-Charles Hue, 2014 (F)</td>
<td>7</td>
<td></td>
<td></td>
<td>Spide</td>
</tr>
<tr>
<td>Under the Rainbow</td>
<td>Agnès Jaoui, 2013 (F)</td>
<td>4</td>
<td></td>
<td></td>
<td>Streams D&amp;D</td>
</tr>
<tr>
<td>Like an open Sky</td>
<td>Mariana Otero, 2013 (F)</td>
<td>2</td>
<td></td>
<td></td>
<td>Streams D&amp;D</td>
</tr>
<tr>
<td>Love Battles</td>
<td>Jacques Doillon, 2013 (F)</td>
<td>3</td>
<td></td>
<td></td>
<td>Streams D&amp;D</td>
</tr>
<tr>
<td>Atlantic</td>
<td>Jan Willen van Ewijk, 2014 (NL/Bel/G/Morocco)</td>
<td>9</td>
<td></td>
<td></td>
<td>IFFR Live</td>
</tr>
<tr>
<td>Erbarme Dich - Matthäus Passion Stories</td>
<td>Ramón Gieling, 2015 (NL)</td>
<td>8</td>
<td></td>
<td></td>
<td>IFFR Live</td>
</tr>
<tr>
<td>Speed Walking</td>
<td>Niels Arden Oplev, 2014 (D)</td>
<td>9</td>
<td></td>
<td></td>
<td>IFFR Live</td>
</tr>
<tr>
<td>Melody</td>
<td>Bernard Bellefroid, 2014 (Bel)</td>
<td>8</td>
<td></td>
<td></td>
<td>IFFR Live</td>
</tr>
<tr>
<td>The Sky Above Us</td>
<td>Marinus Groothof, 2015 (NL, Bel, Serbia, Greece)</td>
<td>8</td>
<td></td>
<td></td>
<td>IFFR Live</td>
</tr>
</tbody>
</table>

| 23 films | 72 | 4 | 7 | 42 |

---

26 simultaneous or quasi-simultaneous or Ultra-VOD releases (VOD window before theatres window)
We will divide these films into several categories:

- films which were commercially released long enough ago for us to have definite data on ticket sales and revenues;
- within this first category, films which were released voluntarily to e-cinema, i.e. direct-to-VOD with a considerable promotional budget;
- films released as part of the IFRR Festival, which must be considered separately, insofar as they were distributed under the special conditions of a festival, which are very different from the conditions of commercial release for a film.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Data unavailable</td>
<td>3 films</td>
<td>Eat your bones, Love Battles, Bastards</td>
</tr>
<tr>
<td>e-Cinema releases</td>
<td>2 films</td>
<td>Welcome to New York, The Keeper of lost causes</td>
</tr>
<tr>
<td>Festival films</td>
<td>5 films</td>
<td>Atlantic, Erbarme Dich - Matthäus Passion Stories, Speed Walking, Melody, The Sky Above Us</td>
</tr>
</tbody>
</table>

It is important to remember the limits as to what interpretations may be made of these studies. Here we must reiterate the warnings from the last report:

- Each film and each release is unique. It is therefore difficult to draw general conclusions from individual cases;
- Comparing the results of an experimental release with those of a traditional release is an exercise in pure speculation, insofar as only the results of the former are actually available, the other, by definition, not having taken place;
- All these results were obtained in the framework of an experiment, which necessarily influences the conditions: the commitment of the various players involved and also the media interest in the films concerned were biased by their inclusion in this experiment;
- The experimental sample - nine films - was too small to allow strict statistical analysis;
- The observations that can be made in the context of this very marginal experiment are in no way indicative of the impact it might have, particularly on the economics of the industry, if it were generalised or made part of a permanent system.

In particular, one should note that most of these films had a limited potential in the countries where they were distributed within the context of the Preparatory Actions.
The notion of a film's potential must be taken with a grain of salt, because it assumes the idea of a pre-existing market, when the work of distribution consists in building the audience gradually. Nevertheless, it is often used, perhaps partly because of its self-fulfilling nature: the expected potential serves as a basis for the release plan which will have an important influence on the actual audience.

In schematic terms, let us consider three configurations on a European scale: films with dense and diffuse potential, films with dense and localised potential, and films with sparse potential. Dense potential in a given area means that the film has a sufficient audience in this area to be shown in a theatre.

One could therefore imagine a film which has a large potential audience on a national or European scale, which is too greatly dispersed for theatre exhibition.

If one considers ticket sales for films released within the context of the first two initiatives of the Preparatory Action, some seem to have a more diffuse potential across several countries: this gives them high potential on the scale of all these countries, but which is doubtless too limited locally to justify theatre showings.

_Magnifica Presenza_ sold between 1,000 and 18,000 tickets in 6 European countries: this is little on a national scale, but represents 34,000 across all of these 6 countries. Similarly, _les Bastards_ sold 87,000 tickets in France and 23,000 across 7 countries. And _Jimmy P._, after having sold 264,000 tickets in France, then sold 24,000 across 10 countries.
The table below provides an overview of the audience structure for films in Europe. The x axis shows the time between the first theatre release and the theatre release for the country in question.

**Figure 11: structures with varied potentials**

<table>
<thead>
<tr>
<th>Films with high potential in a country</th>
<th>Films with diffuse potential</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Jimmy P.</em></td>
<td><em>Magnifica Presenza</em></td>
</tr>
<tr>
<td><img src="image1.png" alt="Graph" /></td>
<td><img src="image2.png" alt="Graph" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Films with average potential across one or two countries</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>The Spirit of 45</em></td>
</tr>
<tr>
<td><img src="image3.png" alt="Graph" /></td>
</tr>
<tr>
<td><em>Io Sono Li</em></td>
</tr>
<tr>
<td><img src="image4.png" alt="Graph" /></td>
</tr>
</tbody>
</table>
4. Film accessibility

We have data for 54 D&D or Ultra-VOD releases.

The previous report highlighted the significant increase in the visibility given to films at the time of their distribution due to simultaneous VOD distribution. The following table reflects this increase.

<table>
<thead>
<tr>
<th>Film</th>
<th>Countries of exhibition in theatres (EU 36)</th>
<th>Countries of experimentation</th>
<th>Potential audience in theatres in the countries of experimentation</th>
<th>Potential audience in theatres + VOD27 in the countries of experimentation</th>
<th>Increase in visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magnifico Presenza</td>
<td>9 Austria, France, Ireland and United Kingdom</td>
<td>71M</td>
<td>102M</td>
<td>+ 44%</td>
<td></td>
</tr>
<tr>
<td>Viramundo</td>
<td>11 France, Italy, Lithuania, Poland, Portugal, Belgium, the Netherlands, Luxembourg, the United Kingdom and Ireland</td>
<td>75M</td>
<td>179M</td>
<td>+ 178%</td>
<td></td>
</tr>
<tr>
<td>The Spirit of 45</td>
<td>14 Belgium, Luxembourg, Italy, Spain, Germany and the Netherlands</td>
<td>45M</td>
<td>62M</td>
<td>+ 44%</td>
<td></td>
</tr>
<tr>
<td>Jimmy P.</td>
<td>12 Italy, Germany and Spain</td>
<td>18M</td>
<td>56M</td>
<td>+ 211%</td>
<td></td>
</tr>
<tr>
<td>Io sono Li</td>
<td>17 Portugal, Belgium, the Netherlands, the United Kingdom and Ireland</td>
<td>28M</td>
<td>76M</td>
<td>+ 171%</td>
<td></td>
</tr>
<tr>
<td>For those in peril</td>
<td>7 France, Poland, Italy, Portugal and the Netherlands</td>
<td>48M</td>
<td>120M</td>
<td>+ 150%</td>
<td></td>
</tr>
<tr>
<td>After the night</td>
<td>6 France, Belgium, Spain and the United Kingdom</td>
<td>41M</td>
<td>115M</td>
<td>+ 180%</td>
<td></td>
</tr>
<tr>
<td>Master of the Universe</td>
<td>France, Italy, the Netherlands, Poland and Greece</td>
<td>49M</td>
<td>115M</td>
<td>+ 135%</td>
<td></td>
</tr>
<tr>
<td>Goodbye to Language</td>
<td>7 Spain, Italy, Germany and Belgium</td>
<td>28M</td>
<td>64M</td>
<td>+ 129%</td>
<td></td>
</tr>
<tr>
<td>Mademoiselle C.</td>
<td>5 Spain, Italy and Germany</td>
<td>27M</td>
<td>64M</td>
<td>+ 137%</td>
<td></td>
</tr>
<tr>
<td>White Shadow</td>
<td>6 France, the United Kingdom, the Netherlands, Lithuania, Hungary and Romania</td>
<td>37M</td>
<td>106M</td>
<td>+ 186%28</td>
<td></td>
</tr>
<tr>
<td>Under the Rainbow</td>
<td>15 United Kingdom, Ireland, Bulgaria and Spain</td>
<td>34M</td>
<td>70M</td>
<td>+ 106%</td>
<td></td>
</tr>
<tr>
<td>Like an open sky</td>
<td>4 Spain and Bulgaria</td>
<td>12M</td>
<td>22M</td>
<td>+ 83%</td>
<td></td>
</tr>
</tbody>
</table>

These figures are rough estimates, based on the population numbers in the urban areas surrounding theatres which showed the films, and the penetration - given or estimated - of VOD. They do, however, show that for all the films which have been released in new formats, the population pool which potentially has access to the film has broadly increased, often at least doubled. This is due to the fact that films are visible to a structurally limited section of the population, the population of areas where the cinema theatres are located, and that in addition, for the films under consideration, the very restricted release plans limit this access even further.

27 calculated with the login data to a VOD service, provided by Digital Agenda for Europe.
28 apart from the Netherlands, for which the data was not known.
Let us take the example of *Goodbye to Language*, by Jean-Luc Godard. Due to the fame of its director, its award at the 2014 Cannes Festival and its experimental nature, this film could arouse spontaneous interest in spectators from all over Europe. It was exhibited in 7 European countries: 3 under traditional release (France, Hungary, Austria), 3 as Day&Date and 1 as Direct-to-VOD.

<table>
<thead>
<tr>
<th>Countries</th>
<th>Urban areas where film exhibited</th>
<th>Coverage</th>
<th>Release within the context of experimentation</th>
<th>Additional population with access to the film</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>142</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td>?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td>?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td>5</td>
<td>39%</td>
<td>D&amp;D</td>
<td>4M</td>
</tr>
<tr>
<td>Spain</td>
<td>4</td>
<td>28%</td>
<td>D&amp;D</td>
<td>7M</td>
</tr>
<tr>
<td>Italy</td>
<td>5</td>
<td>24%</td>
<td>D&amp;D</td>
<td>9M</td>
</tr>
<tr>
<td>Germany</td>
<td>0</td>
<td>0%</td>
<td>Direct-to-VOD</td>
<td>20M</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>40M</strong></td>
</tr>
</tbody>
</table>

So therefore at least 40M additional people in Europe had the possibility of seeing the film when it generated visibility.
5. Additional audience for films released as D&D or Ultra-VOD

The following table summarises the number of admissions and VOD transactions made for these films, in the countries which had been involved in at least 3 experiments.

Figure 12: average results by country for D&D releases

<table>
<thead>
<tr>
<th>Country</th>
<th>No. of Ultra-VOD or D&amp;D releases</th>
<th>Theatre admissions (average)</th>
<th>VOD transactions (average)</th>
<th>Transactions / admissions</th>
<th>Screens / millions of inhabitants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>4</td>
<td>1,466</td>
<td>199</td>
<td>14 %</td>
<td>49</td>
</tr>
<tr>
<td>France</td>
<td>6</td>
<td>4,800</td>
<td>750</td>
<td>16 %</td>
<td>85</td>
</tr>
<tr>
<td>Italy</td>
<td>7</td>
<td>2,581</td>
<td>984</td>
<td>38 %</td>
<td>53</td>
</tr>
<tr>
<td>Netherlands</td>
<td>5</td>
<td>2,319</td>
<td>318</td>
<td>14 %</td>
<td>52</td>
</tr>
<tr>
<td>Poland</td>
<td>3</td>
<td>1,221</td>
<td>366</td>
<td>30 %</td>
<td>31</td>
</tr>
<tr>
<td>Portugal</td>
<td>3</td>
<td>470</td>
<td>92</td>
<td>20 %</td>
<td>51</td>
</tr>
<tr>
<td>Spain</td>
<td>8</td>
<td>3,137</td>
<td>612</td>
<td>20 %</td>
<td>85</td>
</tr>
<tr>
<td>UK/Ireland</td>
<td>7</td>
<td>8,337</td>
<td>763</td>
<td>9 %</td>
<td>61</td>
</tr>
</tbody>
</table>

The ratio of the number of VOD transactions over the number of theatre admissions for a film in a given country is on average 0.66 with a standard deviation of 1.2. This ratio is very important in some cases, as shown in the table below.

Figure 13: D&D releases with a VOD/admissions ratio above 2

<table>
<thead>
<tr>
<th>Film</th>
<th>Country</th>
<th>VOD/admissions ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viramundo</td>
<td>Lithuania</td>
<td>2.18</td>
</tr>
<tr>
<td>For those in peril</td>
<td>Italy</td>
<td>2.01</td>
</tr>
<tr>
<td>After the night</td>
<td>Belgium</td>
<td>2.02</td>
</tr>
<tr>
<td>Master of the Universe</td>
<td>Italy</td>
<td>7.05</td>
</tr>
<tr>
<td>Mademoiselle C.</td>
<td>Italy</td>
<td>3.88</td>
</tr>
<tr>
<td>White Shadow</td>
<td>Hungary</td>
<td>2.68</td>
</tr>
</tbody>
</table>

This ratio between the number of VOD transactions and theatre admissions varies by 10% on average to 40% depending on the countries. One might question the correlation between this report and the density of cinema screens in the countries. The following curve seems to show that there is in fact a correlation as the relative number of VOD transactions increases when the number of theatres in the country falls. This seems to indicate that VOD is a real solution for accessing films.
Italy is an exception: the ratio between VOD transactions and the number of cinema theatres is relatively very high in comparison to the number of theatres in the country.

Italy, Spain and the United Kingdom respectively issued 7, 8 and 7 D&D releases. We can compare the results of the different films in one country.

The following figures show that there is no correlation between the VOD transactions / theatre admissions ratio and the number of film prints, in the cases of Italy and Spain.
The figure below does not reveal any obvious correlation between the country coverage (percentage of the population with the possibility of seeing the film in theatres) and the VOD transactions / theatre admissions ratio in the case of Italy.

We could question the dynamics behind the adoption of these new distribution channels, which suffer at the outset from a lack of reputation. The cases of Spain, Italy and the United Kingdom offer a certain perspective: these three countries each issued seven to eight D&D releases in the space of 12 to 20 months. Spain and Italy seem to show that there is a trend towards adoption, as this ratio increases over time. There does not appear to be the same trend in the United Kingdom.
Figure 18: VOD/admissions ratio in Spain

Figure 19: VOD/admissions ratio in Italy

Figure 20: VOD/admissions ratio in United Kingdom
The degree to which VOD replaces theatres (or cannibalisation) is a very important factor in the recreation of economic balance resulting from the deployment of new film distribution channels, such as D&D.

Experiments provide information on the geography of consumption in theatres and on iTunes. iTunes sales only represent a part of VOD transactions, their geography may serve an accurate approximation of the geography of all electronic transactions.

Let us take the film *Master of the Universe*, which gave rise to high numbers of electronic transactions in certain countries.

<table>
<thead>
<tr>
<th>Countries</th>
<th>Release</th>
<th>Theatres</th>
<th>Admissions</th>
<th>VOD transactions</th>
<th>iTunes share</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>12/11/14 UVOD</td>
<td>26</td>
<td>1160</td>
<td>1503</td>
<td>27 %</td>
</tr>
<tr>
<td></td>
<td>26/11/14 theatres</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>02/10/2014</td>
<td>20</td>
<td>621</td>
<td>323</td>
<td>64 %</td>
</tr>
<tr>
<td>Italy</td>
<td>27/11/2014</td>
<td>12</td>
<td>539</td>
<td>775</td>
<td>92 %</td>
</tr>
<tr>
<td>Poland</td>
<td>05/12/2014</td>
<td>25</td>
<td>2270</td>
<td>807</td>
<td>31 %</td>
</tr>
<tr>
<td>Greece</td>
<td>20/01/2014</td>
<td>1</td>
<td>528</td>
<td>68</td>
<td>100%</td>
</tr>
</tbody>
</table>

The film was screened in theatres in 8 countries, including 5 as part of the Preparatory Action - France, the Netherlands, Italy, Poland and Greece - and 3 outside Preparatory Action (Germany, Switzerland and Austria). The map below shows the geography of theatre admissions for the 5 countries of the experiment, and highlights the very limited nature of the film's accessibility for the populations of the countries concerned.
Figure 21: geography of Master of the Universe theatre admissions for the 5 countries of the experiment

Comparing the geographical distribution of theatre admissions and VOD transactions firstly show that VOD distribution covers a country much more densely, and seems to respond to a demand, as shown in Italy and France.
Figure 22: geographical distribution of theatre admissions and iTunes transactions in Italy

Figure 23: geographical distribution of theatre admissions and iTunes transactions in France

in red are iTunes transactions and in black are theatre admissions. The large dots correspond to a higher number of transactions.
We can compare the geographical distribution of iTunes transactions in the first VOD window (Ultra-VOD, exclusive for two weeks before the cinema release) and the second window, open three months and a half after the film release in theatres.

<table>
<thead>
<tr>
<th>1st VOD window</th>
<th>Theatre exhibition</th>
<th>2nd VOD window</th>
</tr>
</thead>
<tbody>
<tr>
<td>429 transactions (2 weeks)</td>
<td>1,160 admissions</td>
<td>269 transactions (6 weeks)</td>
</tr>
</tbody>
</table>

The number of VOD transactions is clearly higher in the first window, when the film was released in theatres.

Figure 24: Breakdown of iTunes sales during the first and second window of VOD exploitation

The juxtaposition of these two maps demonstrates a general decline in the number of transactions, in particular in areas where the film was distributed in theatres. Thus, around Toulouse, around ten VOD transactions were recorded when the film was available in theatres, and none in the second window, when the film was no longer available.

The same comparison can be made for the Paris region:
Several observations can be made on the basis of these two comparisons:

- the number of VOD transactions falls in the second window;
- the geographical distribution of VOD transactions is relatively similar in the two windows, with perhaps a more pronounced reduction in transactions in the suburbs in the second window;
- a greater concentration of transactions in the city centre than in the suburbs;
- an apparently positive correlation between theatre admissions and VOD transactions.

The same comparison can be made in Milan, where the film was initially offered in VOD, before coming out in the theatres and then being available only on VOD again. With VOD, the film was released on two platforms, but most of the transactions were made on iTunes (95% in the first three weeks).
Figure 28: Master of the Universe audience in Milan

<table>
<thead>
<tr>
<th></th>
<th>Theatre</th>
<th>VOD (iTunes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week of 26 Nov 14</td>
<td>-</td>
<td>51 transactions</td>
</tr>
<tr>
<td>Week of 3 Dec. 14</td>
<td>1 theatre, 2 sessions, 84 admissions</td>
<td>47 transactions</td>
</tr>
<tr>
<td>Week of 10 Dec. 14</td>
<td>-</td>
<td>19 transactions</td>
</tr>
</tbody>
</table>

Although these maps do not provide any information about the potential number of theatre admissions transformed into VOD transactions, they do not necessarily suggest the existence of cannibalisation. The low number of transactions does not allow us to say whether a joint release in theatres and on VOD takes away some of the spectators from the theatre catchment area.
Experiments gave rise to 11 exclusively VOD releases. Of these ten releases, two were "e-cinema" releases, which enjoyed a considerable marketing campaign: *Welcome to New York* in France, Italy, Spain and Germany and *The Keeper of lost causes* in France and Spain.

The case of *The Keeper of lost causes* is interesting to analyse. This film was originally released in France. It is the first episode in a pair of Danish thrillers: *The Keeper of lost causes* and *The Absent One*. The distributor chose to release the two episodes almost jointly - the first only for e-cinema, the second as a traditional release - by putting in place a single promotion campaign for the two films, with the exception of purchasing space on the television, which, in compliance with the prohibition on advertising cinema on the television, only applied to the first episode released for e-cinema.

A theatre release survey was performed by L’Observatoire *de la satisfaction* between Wednesday 8 April and Tuesday 21 April 2015 in the Montparnasse and Opéra neighbourhoods in Paris. Here are the main results.
Several lessons can be drawn from these answers:

- Competition with theatres from e-cinema seems very low on this film, because only 5% of spectators would have preferred seeing it in e-cinema;
- more generally, no spectators calling themselves regulars would prefer e-cinema. Spectators who would have preferred to see the film in e-cinema are from the keen spectators segment who go to the cinema at least once a week. This may mean that for keen spectators, e-cinema is a way to better satisfy their desire for cinema, by seeing more films while still going to the cinema as much as before;
- awareness of e-cinema, for the spectators of this film, is not insignificant, but there is still much room for it to increase;
- there is very good 'catch-on' between the two films in one sense: 58% of the film's spectator intend to rent it. Furthermore, e-cinema brings 3% additional spectators to the theatre, but the survey results do not indicate what proportion of the people who viewed the film in e-cinema came to see the other film in the theatre.

In terms of results, the comparison between the number of tickets sold for *The Absent One* and the number of VOD transactions for *The Keeper of lost causes*, from a shared promotional campaign30, shows, to no surprise, that e-cinema is still far from having set in: the sum spent on purchasing space for 1 spectator is 7 times higher today for e-cinema than for theatres.

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30 or even higher for *The Keeper of lost causes*, because the promotional television campaign, for legal reasons, only covered the VOD release.
The Absent One  |  The Keeper of lost causes
---|---
France theatre release, 8 April 2015 | France e-cinema release, 27 March 2015

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Relative number of spectators per € invested in purchase of space</td>
<td>1</td>
</tr>
</tbody>
</table>

With the development of this new distribution channel, the gap between the cost of acquiring a theatre spectator and an e-cinema spectator is likely to decrease.

The distributor share per spectators is, however, higher for e-cinema. The distributor share per Euro invested in purchase of space is, consequently, not as low in relative terms: 5 times lower for e-cinema in comparison to theatre exhibition. Here again, this relative gap is likely to decrease.

We can compare the audience breakdown in theatres and in e-cinema for the two films. The proximity between the two maps is striking, in particular on a nationwide scale. On a small scale, the audience essentially breaks down in the same way across the whole country, for both types of release, with a polarisation effect for the theatre release. Interpreting this phenomenon is not simple, in particular due to the exclusive nature of each release. One cannot conclude that substitution occurred, because in both cases, the film was only available through one distribution channel.

A larger scale reflects a greater dispersion: VOD spectators are much more dispersed than spectators in theatres, which further corroborates the idea that digital distribution enables potential spectators to access a film. The maps of the Paris region show that many spectators would only have been able to see the film in theatres by travelling long distances.

The comparison between these two maps therefore suggests that e-cinema may be of interest to audiences dispersed across the entire country, who are less "urban".

---

31 brought to base 1, for the number of spectators in theatres per € invested.
32 The size of the dots is not on the same scale, as the number of iTunes transactions and the number of theatre admissions are not of the same amplitude.
It is interesting to compare the audience breakdowns over time. The figure below shows a significant difference in the slope between theatres and e-cinema, which is more than ten times lower for e-cinema. The e-cinema exploitation period is less restricted by theatre saturation. Let us note that there is no reason why this outcome should be specific to e-cinema: it is no doubt valid in general for digital exploitation. Less abrupt audience time structures - with a more gentle slope and a longer duration - are more suited to films which are more difficult to access.
Figure 34: dynamic compared to audience over time

The scales are not the same for *The Absent One* and *The Keeper of lost causes*.
8. The IFFR Live Festival

A festival offers one-off visibility to films which are shown there, which can sometimes go beyond the actual venue. For films which are not yet commercially distributed on a large scale, VOD distribution at the time the festival is scheduled may increase their audience, and may enable potential spectators to see them.

The involvement of the Rotterdam Festival IFFR Live (IFRR) in the Preparatory Action can be examined from this angle. It consisted in showing five of the festival’s films both in 40 theatres in 10 European countries and in VOD in these same countries, and to enable web users to chat to the film teams. It therefore consisted in using the means provided by the Internet to give Festival access to a greater audience.

The results of this experiment cannot be compared to others, because it involved both films that were ambitious in artistic terms but with a naturally limited audience, and films which did not have the means to promote a commercial release.

<table>
<thead>
<tr>
<th>Film</th>
<th>Countries participating</th>
<th>Admissions</th>
<th>VOD transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlantic</td>
<td>8</td>
<td>1,580</td>
<td>319</td>
</tr>
<tr>
<td>Erbarme dich</td>
<td>7</td>
<td>1,869</td>
<td>285</td>
</tr>
<tr>
<td>Melody</td>
<td>7</td>
<td>909</td>
<td>1,027</td>
</tr>
<tr>
<td>Speed Walking</td>
<td>9</td>
<td>1,232</td>
<td>135</td>
</tr>
<tr>
<td>The Sky Above Us</td>
<td>7</td>
<td>405</td>
<td>408</td>
</tr>
</tbody>
</table>
The purpose of this report was not to declare these experiments as successes or failures. In a context where the cinema industry's economics and practices are undergoing profound transformation, the purpose of these experiments is to better understand the changes taking place, and especially to better anticipate the factors which determine complementarity between different distribution channels.

The quantitative results of these experiments remain modest. This was necessarily the case in their construction, because the films chosen, with the exception of films released in e-cinema, were films which were experiencing difficulties in terms of exposure and circulation. Insofar as the idea was to offer extra visibility to films which were lacking it, it is natural that they would have low audience levels, all the more so as they lacked a hefty promotional budget.

Nevertheless, several lessons can be drawn from these experiments.

The first, which is indisputable, is the considerable expansion of the films' potential audience. Whether this is seen in the increase in the potential audience pool, in the comparisons between theatre audiences and digital transactions or in the maps which highlight the audience geography, one can only observe that simultaneous VOD and theatre releases mitigate the aberration of a large proportion of a country having limited access to a film. Day&Date releases are a factor in reducing the real cinematographic divide.

Further conclusions can be drawn on the types of films. Although it is evident that not all films have the same potential, the structure of the audience for the films considered in the experiments highlights a difference in local density of potential, which may make an alternative form of distribution more advantageous. Some films have high potential on a national, or even European scale, but insufficient local potential for in-theatre showings. Combined theatre and VOD releases enable these films to reach a large, yet disparate audience.

Film revenues, in numbers of electronic transactions, are not inconsiderable in comparison to the numbers of theatre admissions and may, in some cases, reach very significant levels.
Furthermore, the countries involved in several experiments show an increase in the transactions/admissions ratio, which seems to show that there is an effect where the audience is educated about this type of distribution and/or distributors learn how to promote it.

The issue of spectators transferring from the theatre to VOD is important for maintaining economic balance in the industry. The geographical reports on iTunes transactions and their comparison with the geography of theatre admissions does not provide any significant information on potential cannibalisation.

Finally, the experiments show, through the major differences that there may be in the films' revenues, that each film is unique, both in terms of the audience it may reach and its reception in a given country. The increasing number of distribution channels is a response to this diversity in film profiles, where the choice of a distribution channel may optimise its audience and improve its overall finances. Theatre, D&D or direct-to-VOD (or e-cinema) releases therefore present options depending on the films' profile.
10. Annexes

Film Forms

AFTER THE NIGHT aka ATE VER A LUZ by Basil da Cunha
ATLANTIC by Jan Willen van Ewijk
BASTARDS aka LES SALAUDS by Claire Denis
EAT YOUR BONES aka MANGE TES MORTS by Jean-Charles Hue
ERBARME DICH – MATTHAUS PASSION STORIES by Ramon Gieling
FOR THOSE IN PERIL by Paul Wright
GOODBYE TO LANGUAGE aka ADIEU AU LANGAGE by Jean-Luc Godard
IO SONO LI aka LA PETITE VENISE by Andrea Segre
JIMMY P aka JIMMY P. PSYCHOTHERAPIE D’UN INDIEN DES PLAINES by Arnaud Desplechin
LIKE AN OPEN SKY aka A CIEL OUVERT by Mariana Otero
LOVE BATTLES aka MES SEANCES DE LUTTE by Jacques Doillon
MADEMOISELLE C. by Fabien Constant
MAGNIFICA PRESENZA by Ferzan Ozpetek
MASTER OF THE UNIVERSE by Marc Bauder
MELODY by Bernard Bellefroid
MISERICORDE aka DEPARTMENT Q : THE KEEPER OF LOST CAUSES by Mikkel Norgaard
SPEED WALKING by Niels Arden Oplev
THE SKY ABOVE US by Marinus Groothof
THE SPIRIT OF 45 aka L’ESPRIT DE 45 by Ken Loach
UNDER THE RAINBOW aka AU BOUT DU CONTE by Agnès Jaoui
VIRAMUNDO de Pierre-Yves Borgeaud
WHITE SHADOW by Noaz Deshe
ATE VER A LUZ (After the Night) by Basil da Cunha

Après la nuit (France)
After the Night (Belgique et Royaume-Uni)
Hasta Ver la Luz (Espagne)

Directed by Basil da Cunha (1st feature)
With Pedro Ferreira, Joao Veiga, Nelson da Cruz Duarte Rodrigues
Nationality: Switzerland/Portugal – Year: 2013
Producers: BOX Productions, HEAD - Geneva
Genre: Drama
Festivals: La Quinzaine des Réalisateurs 2013, Festival de Rotterdam 2014

Synopsis: Straight out of jail, Sombra returns to his life as a drug dealer in the creole slum of Lisbon. In between the money he has lent and can’t get back, the money he owes, a fanciful iguana, an invasive little girl and a ringleader who begins to mistrust him, he starts to think that he might have been better off in the clink...

Distributed by: Numéro Zéro (Belgium), Capricci Films Espana (Spain) Capricci Films (France) and Capricci UK (United Kingdom).
International Sales: Urban Distribution International

Film spotted in the catalogue of Urban Distribution International by Capricci and European partners, interested in a multi-territory and multi-platform release via The Tide Experiment.

3 day-and-date releases, 1 VOD preview release

4 territories
- Belgium, Spain, France and United Kingdom

5 languages
- English, Castilian, Catalan, Flemish and French

17 VOD platforms
- Multiterritorial: iTunes (4 local stores), Google (3 local stores),
- Belgium: Unvisciné, DVDPost, Plush, Voo, Belgacom
- France: La Vod d’Orange, FilmoTV, Distrify
- Spain: Filmin
- United Kingdom: Curzon Home Cinema

20 screens (1st week of exploitation)
Marketing

Joint positioning
- **Target audience:** 25-45 age-group, well-informed, connected film fans
- **Release dates:** release periods grouped within 3 weeks

<table>
<thead>
<tr>
<th>Até ver a luz</th>
<th>Release date</th>
<th>$15</th>
<th>$16</th>
<th>$17</th>
<th>$18</th>
<th>$19</th>
<th>$20</th>
<th>$21</th>
<th>$22</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>09/04/2014 (VOD)</td>
<td>VOD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>23/04/2014 (theatre)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Spain</strong></td>
<td>16/04/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Belgium</strong></td>
<td>23/04/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>United Kingdom</strong></td>
<td>25/04/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* in France, *Après la nuit* was released on VOD 2 weeks (9 April) before the theatrical release (23 April) and its VOD preview exploitation ceased the day before theatrical release.

- **Pooled tools – a shared visual identity**
  - Common poster and trailer;
  - Organization and live on-line streaming on Dailymotion of a debate between the director, Basil da Cunha, and Joël Farges, author-director-producer, member of L’ARP (material subsequently reused for promotion on social media);
  - Promotion on social media centralized and coordinated, on a shared Facebook page (geolocalization);
  - Pooled Internet advertising campaign: videoseeding (placing of trailer on targeted sites with advertising message (call to action) and advertising campaign on Facebook;
  - Relationships with influential European bloggers (newsletters);

- **Local promotion campaigns (and cross-border tools):**
  Local promotion campaigns systematically highlighted the multiplatform release:
  - Mention of the two platforms on all promotional supports;
  - Purchase of advertising space on different media, whether or not they traditionally target one or other mode of exploitation (posters, press inserts, Internet banners, etc.);
  - Highlighting in the local press of the exceptional release scheme. A partnership with the magazine *So Film* also made it possible to promote the film, particularly by making it available to readers on the Internet (solution already proposed to the distributors of *For Those in Peril*).

The director, Basil da Cunha, made himself readily available, being present at previews and evening debates (Paris, London, Barcelona), and granting interviews to the local press (RFI, Le Mouv’, France Inter, El Pais, BTV, etc.) and local VOD platforms (FilmoTV – interview by Laurent Delmas).
ATLANTIC. by Jan-Willem van Ewijk

Directed by Jan-Willem van Ewijk (second feature film)

With Thekla Reuten, Fettah Lamara, Jan-Willem van Ewijk

Production country: The Netherlands — Production year: 2014

Producers: Augustus Film, Propellor Film, Man’s Film Production, Endorphine Production

Budget Production: 1.710.000 euros

Genre: drama

Festivals: Toronto International Film Festival, Busan International Film Festival, Dubai International Film Festival, International Film Festival Rotterdam, Istanbul Film Festival, Seattle International Film Festival.

Synopsis: Fettah’s desire for freedom in Europe is greater than his love for his homeland and family. The young fisherman sets off on an exhausting, perilous journey across the terrain he knows best: the ocean. And not by boat, but on his surfboard. Breathtaking poetic and exciting.

Distributed by: ABC- Cinemien (The Netherlands).

International Sales: Fortissimo Films

8 sorties day-and-date

8 territoires

• The Netherlands, Poland, United Kingdom, Serbia, Slovenia, Spain, Italy, Bosnia-Herzegovina

7 langues

• Dutch, Polish, English, Serbian, Slovenian, Spanish, Italian

2 plateformes VOD

• Multiterritoire: Distrify
  • Spain: Filmin

31 salles
Marketing strategy

A special website was developed: www.iffr.com/live

In the early stages of the project this website was used to inform interested cinemas and other professionals. Close to and during the events the website was used to promote IFFR Live to the audience, to stream films via VOD and function as a second screen during the introductions and Q&A’s.

In addition to this dedicated website participating cinemas received a media kit to promote the events in their cinemas to their audience.

Media Kit

A media kit was developed to promote IFFR LIVE through the participating European cinemas. The media kit contained amongst other things: 6 Facebook and 6 Twitter headers (1 general, and 5 for each specific film) and an IFFR Live introduction film.

Twitter

The media kit also included an extensive schedule of tweets for different target audiences using #livecinema. IFFR Live was promoted as event and as individual screenings. The tweets included specially made trailers, stills and after movies (see below).

The tweet schedule was structured as follows:

<table>
<thead>
<tr>
<th>Before the festival</th>
<th>During IFFR Live</th>
<th>After the screening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spread the word (film lovers)</td>
<td>Premiere Announcements</td>
<td>Premiere Announcements</td>
</tr>
<tr>
<td>Spread the word (press &amp; influencers)</td>
<td>Engagement Boosts</td>
<td>Engagement Boosts</td>
</tr>
<tr>
<td>Boost Ticket Sales (Tiger Friends of the IFFR)</td>
<td>Aftermovies</td>
<td>Aftermovies</td>
</tr>
<tr>
<td>Premiere Announcements</td>
<td>Next premiere announcements</td>
<td>Next premiere announcements</td>
</tr>
<tr>
<td></td>
<td>retweets (ad hoc)</td>
<td>retweets (ad hoc)</td>
</tr>
<tr>
<td></td>
<td>Live Reporting and Quotes</td>
<td>Live Reporting and Quotes</td>
</tr>
</tbody>
</table>

Different messages were prepared for different groups of Twitter users: IFFR, cinemas and VOD platforms, KPN and so called influencers: such as cast and crew of the film.

Twitter was not only the tool for the interactive Q&A, but also an active media partner that helped to promote IFFR Live on a large scale within Europe.

After movies

An ‘After Movie’ was made after each IFFR Live event. This after move gave an impression of the IFFR Live event. The after movies were distributed through Twitter (see above) and YouTube.

Analogue Promotion in and by cinemas

Film posters of the films with special stickers were sent to the cinemas. The stickers mentioned: ‘IFFR Live. Special screening + live Twitter Q&A with film maker and cast. #livecinema @IFFR www.IFFR.com/Live.’ Participating cinemas were invited to make their own marketing plan and apply for reimbursement of related costs.

VOD promotion in the cinemas
After each cinema screening, a special promotion code was shown on the screens. Audiences were encouraged to tell their friends about the experience they had and share the promotion code.

**Promotion on Filmin**

Filmin dedicated a post on its blog to IFFR Live in general and to each specific event.

**Impact social media**

- IFFR Live website was visited from 640 cities in 61 countries.
- Over a period of 5 days, 2,496 film fans were responsible for 4,162 views, using their mobile phone, tablet or computer.
- #livecinema was trending topic in The Netherlands 3 times and has reached an estimated amount of 4 million impressions
- Nearly 67,000 people we reached on Facebook

**Audience numbers**

**Audience in cinemas**

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of cinemas (TOTAL)</th>
<th>Audience numbers (TOTAL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>14</td>
<td>1066</td>
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<tr>
<td>Poland</td>
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<tr>
<td>UK</td>
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<tr>
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<tr>
<td>Spain</td>
<td>1</td>
<td>16</td>
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<tr>
<td>Italy</td>
<td>2</td>
<td>24</td>
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<tr>
<td>Serbia</td>
<td>3</td>
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<td>Bosnia-Herzegovina</td>
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**VOD numbers**

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<tr>
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<tr>
<td>Spain</td>
<td>1</td>
<td>Filmin</td>
<td>276</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>319</strong></td>
</tr>
</tbody>
</table>
BASTARDS by Claire Denis

**Director:** Claire Denis
**With:** Vincent Lindon, Chiara Mastroianni, Julie Bataille, Lola Créton, Michel Subor
**Nationality:** France – **Year:** 2013
**Producers:** Alcatraz Film, Wild Bunch
**Genre:** Drama
**Festivals:** Festival de Cannes 2013: nominated in Un Certain Regard, Prague French Film Festival, Fabiofest film festival (Slovakia)

**Synopsis:** A man commits suicide, leaving his affairs in chaos and wife in a state of distress. She contacts her brother (Vincent Lindon), who gives up his job as a merchant sea captain to investigate what happened. But the truth may be something that no one ever wants revealed. Acclaimed French filmmaker Claire Denis (White Material, Beau Travail) returns with arguably her most mysterious work since 2004’s L’intrus.

**EDAD Distributors:** Artcam (Czech Republic), Curzon Film World (UK + Eire), ASFK (Slovakia), Golem (Spain)
**International sales:** Wild Bunch

**Key arguments why we chose bastard for EDAD:**
- Claire Denis is one of the most acclaimed European directors
- The cast had the potential to appeal to a foreign, arthouse audience
- 4 European distributors were willing to release the film day-and-date

**5 day-and-date releases**
- Theatrical: 28 November 2013 in Czech Republic, 14 February 2014 in the UK and Eire, 21 March 2014 in Spain and Slovakia
- VOD: strictly day-and-date with the theatrical release in all territories

**5 territories**
- Czech Republic, UK, Eire, Spain, Slovakia

**9 VOD platforms**
- Czech Republic + Slovakia - SVOD: Voyo.cz (48 hours only) / TVOD: Aerovod.cz
- UK + Eire - Premium VOD: Curzon Home Cinema / Filmflex / BFI Player / GFT Player (Glasgow Film Theatre) / Current VOD: iTunes
- Spain - Filmin, Imagenio
**Release schedule**

<table>
<thead>
<tr>
<th>Date</th>
<th>Territory</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>28 Nov 13</td>
<td>Czech Republic</td>
<td>D&amp;D release</td>
</tr>
<tr>
<td>14 Feb 14</td>
<td>UK + Eire</td>
<td>D&amp;D release</td>
</tr>
<tr>
<td>21 Mar 14</td>
<td>Spain + Slovakia</td>
<td>D&amp;D release</td>
</tr>
</tbody>
</table>

**Marketing Plan**

- **Title:** The film was released under three different titles according to the local specs of each territory: *Parchanti spi dobře* in Czech Republic and Slovakia, *Bastards* in the UK and Eire, *Los Canallas* in Spain.

- In all five territories, the film was meant to appeal to an arthouse cinema audience, males and females aged 40 to 60 with an urban profile. The French community along with fans of Claire Denis were also targeted.

- The marketing campaign emphasized as much as possible that the film was released day-and-date in theatres and on demand.

- Press advertising focused on general newspapers (Periodico de Cataluna in Spain, The Observer and The Guardian in the UK), cultural magazines (Time Out in the UK, A2 in Czech Republic) and film magazines (La Guia del Ocio and Cine 200 in Spain).

- Online advertising was key to make people aware of the day-and-date release. All four distributors used Facebook and Twitter promoted posts. Web banners and/or trailers were displayed on Cinepur.cz (Czech Republic), The Guardian website (UK), Preview Network (Spain).

- Special events were organised to raise awareness around the film: Claire Denis came to the UK for a Q&A following the UK premiere of the film and was in Madrid to promote the film on the 19 March 2014. In Czech Republic, the film pre-premiered at the Prague French Film Festival with a reception and the release was followed by a Claire Denis retrospective at the National Film Archive. In Slovakia the release took place during the Febiofest Film Festival as one of the first D&D release of a foreign film in the territory.

- The UK, Eire and Czech Republic also ran competitions around the film online and on the radio.

- Posters, flyers, postcards were created and displayed.
EAT YOUR BONES by Jean-Charles Hue

Directed by Jean-Charles Hue
Nationality: Italy/Germany – Year: 2013
Producers: Asmara Film, Chromosom Film
Production Budget: 1 103 434 Euros
Genre: fiction

Synopsis: 18-year-old Jason Dorkel belongs to the community of travelers. He is about to celebrate his Christian baptism while Fred, his half-brother, returns after several years in prison.

Distributors: Artcam (Czech Republic and Slovakia), Contact Film (The Netherlands), Gutek Films (Poland), Numéro Zero (Belgium), Capricci Cine (Spain), Capricci UK (UK).
Sales Agent: Capricci Films

7 day-and-date releases

7 European territories

• Belgium, Czech Republic, Poland, Slovakia, Spain, The Netherlands and United Kingdom

7 languages

• Czech, English, French, Dutch, Polish, Slovak and Spanish

23 VOD platforms

• Multi-territory: iTunes (7 local stores), Google Play (3 local stores), Sony (2 local stores).
• Netherlands: KPN, UPC
• Spain: Filmin, Wuaki TV
• United Kingdom: Curzon Home Cinema, Amazon
• Poland: Onet
• Belgium: Universciné, DVPPost, Plush, Voo
• Czech Republic: Alza.cz, Voyo.cz, aerovod.cz
Marketing

Joint positioning

Target audiences:
Primary target: Men and women between 25 and 50 years-old, highly educated, urban, relatively-frequent cinemagoers, the so-called “Movie selectives”. More for theatrical. Men between 25 and 50 years-old with eclectic tastes for cinema, the so-called hyper-connected movie addicts. More for VOD.

Secondary target: Political and social engaged communities with diversity; Eventually gypsies / Roman communities for event-driven actions (not for theatrical or VOD figures)

Release dates:

<table>
<thead>
<tr>
<th>White Shadow</th>
<th>Release dates</th>
<th>W13</th>
<th>W14</th>
<th>W15</th>
<th>W16</th>
<th>W17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slovakia</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Netherlands</td>
<td>2/04/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Czech Rep</td>
<td>2/04/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>10/04/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>17/04/2015 (theaters) &amp; 23/04/2015 (VOD)</td>
<td></td>
<td></td>
<td></td>
<td>Theaters</td>
<td>VOD</td>
</tr>
<tr>
<td>Belgium</td>
<td>22/04/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>United-Kingdom</td>
<td>25/04/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comparisons:
- Animal Kingdom (2010) by David Michôd
- The Lord’s ride (2010) by Jean-Charkes Hue

Pooled and pan-European promotional tools:
A genuine consensus on the positioning of the film made it possible to:
- design of new poster, new trailer edit, press-dossier and website translated for all territories (http://eatyourbonesfilm.com/). Two different posters were chosen by all the territories
- create a Facebook page (https://www.facebook.com/eatyourbones) in order to launch the geo-localized trailers and boost them for each territory. As the film had a different title on each territory the page was just used as a launch platform. We collaborated with each territory to boost the title in their own networks
- manage digital video campaign through Emerse to promote the trailers in YouTube and linked to specialized sites and in simple Emerse YouTube TrueView
- launch an event-driven element: the director visited UK and we shot an exclusive video about his experience and contact with the audience. This video was used across the other countries as well.
ERBARMÉ DICH- MATTHÉAUS PASSION STORIES

by Ramón Gieling

Directed by: Ramón Gieling
Production country: The Netherlands – Production year: 2015
Producers: KeyDocs
Genre: documentary

Festivals: International Film Festival Rotterdam, Visions du Réel, Jeonju International Film Festival,

Synopsis: Impressive, labyrinthine narrative by Gieling (Johan Cruijff: en un momento dado on Bach’s Matthew Passion and the exceptional relationship that experts (including theatre director Peter Sellars and conductor Pieter Jan Leusink) and enthusiasts have with this work. In the meantime, a homeless choir rehearses the piece.

Distributed by: ABC- Cinemien (The Netherlands)

Marketing strategy
See Marketing strategy Atlantic.
**Audience numbers**

**Audience in cinemas**

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of cinemas (TOTAL)</th>
<th>Audience numbers (TOTAL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>14</td>
<td>1476</td>
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<tr>
<td>Poland</td>
<td>6</td>
<td>144</td>
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<tr>
<td>UK</td>
<td>2</td>
<td>21</td>
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<tr>
<td>Italy</td>
<td>2</td>
<td>30</td>
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<td>Spain</td>
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<td>16</td>
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<tr>
<td>Serbia</td>
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<tr>
<td>Bosnia-Herzegovina</td>
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<tr>
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<td><strong>1869</strong></td>
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**VOD numbers**

<table>
<thead>
<tr>
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<th>Platforms</th>
<th>Total views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poland, UK, Serbia, Italy, Bosnia and Herzegovina</td>
<td>1</td>
<td>Distrify</td>
<td>2</td>
</tr>
<tr>
<td>Spain</td>
<td>1</td>
<td>Filmin</td>
<td>283</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>285</strong></td>
</tr>
</tbody>
</table>
GOODBYE TO LANGUAGE 3D
By Jean-Luc Godard

Directed by Jean-Luc Godard
Nationality: France/Suisse – Production year: 2014
Producers: Brahim Chioua, Vincent Maraval, Alain Sarde
Production Budget: 2M€
Genre: Drame
Festivals: Jury Prize of the 2014 Cannes Film Festival, Best Picture of the 2014 National Society Critics Awards

Synopsis:
The idea is simple: A married woman and a single man meet. They love, they argue, fists fly. A dog strays between town and country. The seasons pass. The man and woman meet again. The dog finds itself between them. The other is in one, the one is in the other and they are three. The former husband shatters everything. A second film begins: the same as the first, and yet not. From the human race we pass to metaphor. This ends in barking and a baby’s cries.

Distributors: BiM Distribuzione (Italy); Wild Bunch Germany (Germany); Vertigo (Spain); Numéro Zéro (Belgium)
Sales agent: Wild Bunch

3 day-and-date releases & 1 festival premiere followed by a direct-to-VOD release
• Day-and-date release in Spain, Italy & Belgium
• Festival & direct-to-VOD release in Germany (AROUND THE WORLD IN 14 FILMS Festival in Berlin)

4 territories
• Belgium, Germany, Italy and Spain

5 languages
• Dutch, French, German, Italian and Spanish

18 VOD platforms
• Multiterritorial: iTunes (4 local stores)
• Italy: GooglePlay, Chili, Timvision, Mymovies, Infinity, Premium Play e Anicaondemand
• Spain: Filmin, Wuaki, Nubeox, Yomvi, Ono, Movistar
• Belgium: UniversCiné

42 cinemas

Key arguments in the selection of this title for the Speed Bunch project:
- Jean-Luc Godard is a famous European director;
Jean-Luc Godard is one of the first European directors who have really shown a deep willingness to test new distribution models, as shown before with the release strategy of *Film Socialism* which was premiered on VOD simultaneously to its official screening in Competition at Un Certain Regard of the Festival de Cannes 2010, during two days before its theatrical release;

*Goodbye to Language* was selected at the Festival de Cannes 2014 and received the Jury Prize, confirming Godard’s international reputation.

**Marketing**

**Common release date:** choice of a common release date taking into account respective line-ups and markets of each distributor and following one rule: release the film in all territories and on all medias concerned within the shortest possible time-frame

**Release dates:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Territory/Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov 20</td>
<td>Italian theatrical release</td>
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<tr>
<td>Nov 27</td>
<td>Spanish theatrical release</td>
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<tr>
<td>Dec 3</td>
<td>French &amp; German VOD releases</td>
</tr>
<tr>
<td>Dec 10</td>
<td>Belgium day-and-date release</td>
</tr>
<tr>
<td>Dec 11</td>
<td>Spanish &amp; Italian VOD releases</td>
</tr>
</tbody>
</table>

**Pooled and pan-European promotional tools:**

A genuine consensus on the positioning of the film made it possible to:

- **Share visual identity:** use of the same designer to draw up a joint graphics charter (common poster, trailer, etc.). However, freedom for each distributor to adapt to his own market and the expectations of his local audience.

- **Social media campaign:** Facebook, Twitter, Youtube
  - **Distributors’ social media pages:** these pages already have their fan bases so it’s more efficient than create a new specific one for the film and start from 0 like.
  - **iTunes facebook pages:** the international main page has more than 29 million likes with the possibility to target only the French or German fans. The Italian page has more than 500,000 fans.
  - **VOD platform’s social media pages:** promotion by the VOD platforms such as MYmovies or Filmin

- **Web campaign:** targeted by territory with banners mentioning the VOD release and also the theatrical release for the countries concerned.

- **Get a single and strong promotion strategy on iTunes VOD platform:**
  - Promotion on home pages of local stores (sliders+bricks)
  - Promotion on iTunes Facebook pages
Focus on the partnership with MYmovies, the Italian VOD platform (with more than 700,000 daily page views): Starting from November 10th, Goodbye to Language was launched on many placements of MyMovies website, which reserved to the movie a wide coverage. MyMovies.it hold a live event with a big web coverage on the first day of the VOD release (December 11th): a live streaming in a virtual theatre for 300 viewers. They re-launched each news on their social media pages (Facebook: more than 300,000 fans. Twitter: 18,500 followers).
FOR THOSE IN PERIL by Paul Wright

Directed by Paul Wright (1st feature film)
With George Mackay, Kate Dickie, Nichola Burley
Nationality: UK – Year: 2013
Producers: Warp X, Film 4, BFI, Creative Scotland
Genre: drama
Festivals: Semaine de la Critique (Cannes 2013), Edinburgh International Film Festival 2013, Stockholm International Film Festival, Dinard Festival of British Cinema, BAFTA

Synopsis: Aaron, a young misfit living in a remote Scottish fishing community, is the lone survivor of a strange fishing accident that claimed the lives of five men including his older brother. Spurred on by sea-going folklore and local superstition, the village blames Aaron for this tragedy, making him an outcast amongst his own people. Steadfastly refusing to believe that his brother has died, he sets out to recover him and the rest of men.

Distributed by: Alambique (Portugal), Amstel Films (Netherlands), Distrib Films (France), Nomad Films (Italy) and Tongariro Releasing (Poland).
International sales: Protagonist Pictures
Film suggested to TIDE by Protagonist Pictures following the 2013 Cannes Festival.

4 day-and-date releases, 1 VOD preview release

5 territories
  • France, Italy; Netherlands, Poland and Portugal

5 languages
  • French, Italian, Dutch, Polish and Portuguese.

27 VOD platforms
  • Multiterritorial: iTunes (5 local stores) and Distrify
  • France: FilmoTV, La Vod d’Orange
  • Italy: OwnAir, MyMovies
  • Netherlands: Videoland, MovieMaxOnline, Mejane, Mubi
  • Poland: Vod.pl, Kinoplex, Vectra
  • Portugal: MEO, Vodafone, Screenburn, Vodafone, Optimus, Cabovisao

40 screens (1st week)
Marketing

Joint positioning

- **Target audience**: film fans (Art House)

- **Release dates**: initially the European releases were grouped in early 2014, but the release timetables (of distributors and their local competitors) obliged the Portuguese and Italian distributors to postpone their releases of *For Those in Peril*.

  > 15-week cycle

<table>
<thead>
<tr>
<th>For Those in Peril</th>
<th>Release dates</th>
<th>S3</th>
<th>S4</th>
<th>S7</th>
<th>S10</th>
<th>S17</th>
<th>S18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
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<tr>
<td>France*</td>
<td>22/01/2014 (VOD)</td>
<td>VoD</td>
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<tr>
<td></td>
<td>12/02/2014 (salle)</td>
<td>Theatre</td>
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<tr>
<td>Poland</td>
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<td></td>
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<tr>
<td>Italy</td>
<td>06/03/2014</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Portugal</td>
<td>24/04/2014</td>
<td></td>
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</tbody>
</table>

* in France, *For Those in Peril* was released on VOD 3 weeks (22 January) before the theatrical release (12 February) and its VOD preview exploitation ceased the day before theatrical release.

- **Comparisons**:  
  - *Beasts of the Southern Wild* (2012) by Benh Zeitlin  

- **Pooled and pan-European promotional tools**:  
  A genuine consensus on the positioning of the film made it possible to:
  - Fully develop a common visual identity and aim at pan-European awareness: common poster, trailer, Internet banners and Web site. All the more so in that other distributors outside the scope of TIDE used the same identity (Non-Stop Entertainment in Sweden and Soda Pictures in the UK) and helped to maintain live awareness (see below);
  - Encourage cross-cutting promotion. Thus the shared Web site informed audiences about different release sites (links to VOD platforms and theatres);
  - Launch new joint promotion actions: videoseeding (placing of trailer on targeted sites with advertising message (call to action), actions targeting specialized cinema bloggers (SEO) and launch of a dedicated operation (with live streaming on Youtube and Dailymotion) of an interview of Paul Wright, director of *For Those in Peril*, and the lead actor, Georges MacKay, moderated by a BBC journalist. This event was used for promotion on social media and through bloggers.

**Local promotion campaigns (and cross-border tools):**  
The distributors worked to implement cross-cutting strategies:

- In contacts with the press. However the local media did not really cover the event despite the exceptional character of the releases and the proposal made by the distributors, at the instigation of TIDE, to involve them in the release by making the film available on line on their sites (following the model proposed by *The Guardian*). The local media in fact showed little interest in this initiative.
Director: Andrea Segre
With: Tao Zhao, Rade Serbedzija
Nationality: Italy – Year: 2011
Producers: Jole Film, Aeternam Films
Genre: Drama
Festivals: Venice Film Festival, London Film Festival, 8 ½ - Festa do Cinema Italiano (Lisbon), Panazorean (Faial), Brussels Film Festival, Festival du Film Européen de Virton, Mooov festival (Turnhout), etc.

Synopsis: Andrea Segre’s intimate drama tells the story of Shun Li, a Chinese immigrant forced to move from Rome in order to work in a bar on a small island in the Veneto lagoon. Though lonely at first, she meets Bepi, a Slavic fisherman, nicknamed the Poet, who befriends her. However, the locals are not so happy about this. Tao Zhao and Rade Serbedzija are impressive as the oddly matched pairing in this evocative drama.

EDAD Distributors: Curzon Film World (UK + Eire), Cinemien (Belgium + The Netherlands), Associação Il Sorpasso (Portugal)
International sales: Adriana Chiesa

Key arguments why we chose Io Sono Li for EDAD:
- a European film par excellence given its subject matter
- Andrea Segre already involved in expanding the audience for art-house films, having co-founded the distribution network ZaLab
- 3 European distributors were willing to release the film day-and-date

5 day-and-date releases
- Theatrical: 21 June 2013 in the UK and Eire, 17 July 2013 in Belgium, 18 July 2013 in the Netherlands and 30 September 2013 in Portugal
- VOD: strictly day-and-date with the theatrical release in the UK and Eire, maximum 2 weeks after the theatrical release in Belgium, the Netherlands and Portugal

5 territories
- UK, Eire, Belgium, the Netherlands, Portugal

8 VOD platforms
- UK, Eire - Day-and-date: Curzon Home Cinema/ Current: iTunes, Blinkbox, Volta
- Belgium, the Netherlands: Belgacom, Cinemalink.tv, Chello
- Portugal: Mubi
Release schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Territory</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>21 June 13</td>
<td>UK + Eire</td>
<td>D&amp;D release</td>
</tr>
<tr>
<td>17 Jul 13</td>
<td>Belgium</td>
<td>nearly-D&amp;D release</td>
</tr>
<tr>
<td>18 Jul 13</td>
<td>Netherlands</td>
<td>nearly-D&amp;D release</td>
</tr>
<tr>
<td>19 Sept 13</td>
<td>Portugal</td>
<td>nearly-D&amp;D release</td>
</tr>
</tbody>
</table>

Marketing Plan

- In all five territories, the film was meant to appeal to the Italian community, but also to a wider audience made of males and females aged 25 to 55, yet limited to a niche, “art-house” crowd.

- Our press campaign emphasized as much as possible that the film was released day and date in theatres and on demand. It was more focused on general newspapers and magazines in the UK and Eire (15x5 in The Observer and The Guardian, ½ page in Time Out…) whereas Belgium and the Netherlands concentrated on more specific film press (VPRO Gids, Filmagenda, De Filmkrant). In the Netherlands, the film was also advertised on local TV through the AT5 film magazine.

- Internet and social networks were used as a core media to promote the film in all five territories. Online banners and super-headers were displayed on newspapers websites such as theguardian.co.uk or Ilgiornale.nl. Facebook promoted posts and email newsletters also helped us to raise awareness of the film being released day and date.

- Special, interactive marketing: Curzon Cinemas ran a competition that went live on their curzoncinemas.com/win page. A partnership was established with London cinema Cine Lumiere who also ran a competition via their newsletter (50K subscribers) a week prior to the release. Both the UK and Portugal organised a special screening followed by a Q&A (“Questions & Answers”) with the director Andrea Segre – within the framework of their partnership with Cine Lumiere for Curzon Film World, and at the Cinemateca Portuguesa, Museu do Cinema for Il Sorpasso.

- All five territories shared their experience and sought advice from each other via regular phone calls and emails as well as in meetings in Berlin and Cannes.
**SPEED BUNCH**

**JIMMY P. by Arnaud Desplechin**

**Director:** Arnaud Desplechin  
**With:** Benicio Del Toro, Mathieu Amalric,  
**Nationality:** France – **Year:** 2013  
**Producers:** Why Not Productions  
**Genre:** Drama  
**Festivals:** Official Selection, Competition - Festival de Cannes 2013

**Synopsis:** At the end of World War II, Jimmy Picard, a Native American Blackfoot who fought in France, is admitted to Topeka Military Hospital in Kansas – an institution specializing in mental illness. Jimmy suffers from numerous symptoms: dizzy spells, temporary blindness, hearing loss... and withdrawal. In the absence of any physiological causes, he is diagnosed as schizophrenic. Nevertheless, the hospital management decides to seek the opinion of Georges Devereux, a French anthropologist, psychoanalyst and specialist in Native American culture. JIMMY P. (Psychotherapy of a Plains Indian) tells the story of the encounter and developing friendship between two men who would never normally have met, and who appear to have nothing in common. Together, they embark on an exploration of Jimmy’s memories and dreams, an experiment they conduct like a couple of detectives, and with an ever-growing complicity.

**Distributors:** BiM Distribuzione (Italy), Vertigo (Spain) and Wild Bunch Germany (Germany)

**International sales:** Wild Bunch

Key arguments in the selection of this title for the Speed Bunch project:
- Arnaud Desplechin is a well-known European director  
- JIMMY P benefited from good visibility during the 2013 Cannes Film Festival where it was part of the official selection.  
- Well-known international cast: Benicio del Toro, Mathieu Amalric

**2 day-and-date releases and 1 direct-to-VOD release**

- Theatre: March 20, 2014 in Italy and March 21 in Spain  
- VOD: March 20 in Italy and March 21 in Spain and Germany

**3 territories**
- Germany, Spain, Italy

**3 languages**
- German, Spanish, Italian

**16 VOD platforms**
- Multiterritorial: iTunes (3 local stores)  
- Italy: MyMovies, GooglePlay, Infinity, PremiumPlay, Chili, Cubovision  
- Spain: Yomvi(Canal+), Wuaki, Filmin, Imagenio, Ono, Nubeox  
- Germany: Maxdome

**13 cinemas**
Marketing

- **Common release date:** choice of a common release date taking into account applicable regulations, the respective line-ups and markets of each distributor and following one rule: release the film on all territories and all medias concerned within the shortest possible time-frame.

- **Shared visual identity:** use of the same designer to draw up a joint graphics charter. However, freedom for each distributor to adapt to his own market and the expectations of his local audience.

- **Promotion on VOD platforms:**
  - Multiterritorial platform: iTunes
    - Promotion on home pages of local stores (sliders+bricks)
    - Promotion on iTunes Facebook pages
  - Local platforms: highlighting on their home pages, promotion in their newsletters

- **Promotion on social media** of distributors' VOD platforms

- **Web campaign:** targeted by territory with banners mentioning the VOD release and also the theatrical release for the countries concerned.

- **Press coverage** with articles in national newspapers. Same difficulty as was encountered during the first release of *THE SPIRIT OF ’45* concerning coverage of the experimental aspect of day-and-date releases. Few articles in fact mentioned this information.

- **Focus on the partnership with MYmovies,** the Italian VOD platform: creation of an official site, cover of the newsletter, post-roll trailer 14 days before the release (140,000 hits), highlighting on the home page, banners, Facebook and Twitter posts and also an exceptional VOD preview on release day. On this occasion, MYMOVIES pre-bought 300 VOD transactions and offered them to the first 300 applicants (sold out several days before release).
Directed by Mariana Otero
Country: France – Production year: 2013
Producers: Archipel 33, Les Films du Fleuve
Production Budget: 666,339 euros
Genre: Documentary
Festivals: Gindou Film Festival, Zurich Film Festival, Rio de Janeiro International Film Festival

Synopsis: On the franco-belgian border, there’s a unique place that takes in children with mental and social problems. Day after day, the adults try to understand the enigma that each one of them represents and without ever imposing anything on them, invent the solutions that will help them to live in peace, case by case. Through their stories ‘Like An Open Sky’ reveals their singular vision of the world to us.

Distributed by: Filmin & Cameo (Spain), Art Fest & NetCinema (Bulgaria)
Sales Agent: Doc & Film International

2 day & date releases
2 territories
• Spain, Bulgaria
2 languages
• Spanish, Bulgarian
4 VOD platforms
• Spain: Filmin, iTunes, Ara TV
• Bulgaria: NetCinema
7 prints (1st week)

1. Marketing

Global positioning
Targeted audience: mental health professionals and families who suffer from this kind of psychological disorder

Release dates:

<table>
<thead>
<tr>
<th></th>
<th>Premiere</th>
<th>Theatrical release</th>
<th>VOD release</th>
<th>DVD release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>16/10/2014 (Barcelona) 17/10/2014 (Madrid)</td>
<td>24/10/2014</td>
<td>24/10/2014</td>
<td>03/12/2014</td>
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<tr>
<td>Bulgaria</td>
<td>23/01/2014</td>
<td>23/01/2014</td>
<td>23/01/2014</td>
<td>-</td>
</tr>
</tbody>
</table>

Similar titles:
- *Etre et avoir / To Be and To Have* (2002) by Nicolas Philibert
- *Entre nos mains / Into Our Own Hands* (2010) by Mariana Otero

Transnational Marketing & Promotion:
- At a first glance, 'Like An Open Sky' seemed to be the hardest film to market out of the three that compose the Streams Day & Date project. First of all because of its subject: the Lacanian approach of autism. Then because of its genre; indeed documentaries are not very popular among audiences at the theatre. To top it off, even though the director Mariana Otero won many awards for her previous films, she is not widely known on an international scale.
- Given the nature of the documentary, we reached out to the Ecole de la Cause Freudienne, an association of psychoanalysts that was already involved in the production and distribution of the film in France. This association has many branches worldwide and so they helped us to get in touch with a lot of professionals interested in the subject of the film.
- The director also played an important part in the promotion of the film since she attended the two premieres organised in Barcelona and Madrid, and participated in a Q&A session.
- We used the same promotional assets (trailer, poster...) for the theatrical, VOD and DVD releases.

Exploitation results

Theatrical

<table>
<thead>
<tr>
<th></th>
<th>NUMBER OF THEATERS (1st WEEK)</th>
<th>NUMBER OF THEATERS (TOTAL)</th>
<th>NUMBER OF ADMISSIONS (1st week)</th>
<th>NUMBER OF ADMISSIONS (4th week)</th>
<th>NUMBER OF ADMISSIONS (8th week)</th>
<th>NUMBER OF ADMISSIONS (TOTAL)</th>
<th>GROSS BOX-OFFICE</th>
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<tr>
<td>Spain</td>
<td>4</td>
<td>4</td>
<td>132</td>
<td>0</td>
<td>0</td>
<td>207</td>
<td>€1,413</td>
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<tr>
<td>Bulgaria</td>
<td>3</td>
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<td>105</td>
<td>0</td>
<td>0</td>
<td>105</td>
<td>€366</td>
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<tr>
<td>Total</td>
<td>7</td>
<td>8</td>
<td>237</td>
<td>0</td>
<td>0</td>
<td>312</td>
<td>€1,779</td>
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VOD

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<tr>
<th>NUMBER OF PLATFORMS</th>
<th>PLATFORMS</th>
<th>VIEWS (Weeks 1-4)</th>
<th>VIEWS (Weeks 4-8)</th>
<th>VIEWS (TOTAL)</th>
<th>GROSS RECEIPTS</th>
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<tbody>
<tr>
<td>Spain</td>
<td>3</td>
<td>Filmin, Ara TV, Itunes</td>
<td>93</td>
<td>20</td>
<td>121 + 37 itunes</td>
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<tr>
<td>Bulgaria</td>
<td>1</td>
<td>NetCinema.bg</td>
<td>38</td>
<td>4</td>
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<tr>
<td>Total</td>
<td>131</td>
<td>24</td>
<td>163</td>
<td></td>
<td>€337.24</td>
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</table>

DVD

<table>
<thead>
<tr>
<th></th>
<th>UNITS SOLD</th>
<th>GROSS RECEIPTS</th>
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</thead>
<tbody>
<tr>
<td>Spain</td>
<td>562</td>
<td>€2,689.69</td>
</tr>
</tbody>
</table>
Directed by Jacques Doillon
With Sara Forestier, James Thierrée
Country: France – Production year: 2012
Genre: Drama
Festivals: Berlin International Film Festival, CPHPIX, Taipei Film Festival, Paris Cinéma, São Paulo International Film Festival

Synopsis: A bucolic summer landscape in the French countryside. A nameless couple meet. The woman has returned to her village following the death of her father, who never loved her. Here she meets a man – a sort of Pan – who spends his days farming and writing. Every encounter culminates in the need for them to confront each other physically. The man and woman embark on a playful exploration, each making use of their own weapons. The verbal sparring intensifies with shoving, punching and wrestling, escalating to the point where their frequent fighting sessions become real love battles...

Distributed by: Filmin & Cameo (Spain), Art Fest & NetCinema (Bulgaria), Universcine Belgium (Belgium)
Sales agent: Doc & Film International

3 day & date releases

3 territories
• Spain, Bulgaria, Belgium

3 languages
• Spanish, Bulgarian, French

6 VOD platforms
• Spain: Filmin, iTunes, Ara TV
• Bulgaria: NetCinema
• Belgium: Universcine Belgium, iTunes, Belgacom

11 prints (1st week)
Marketing

Global positioning

- **Targeted audience:**
  - Women aged 30 to 45, interested in art-house films (theatrical release)
  - Men aged 35 to 50 (VOD release)

- **Release dates:**

<table>
<thead>
<tr>
<th>Mes séances de lutte</th>
<th>Premiere</th>
<th>Theatrical release</th>
<th>VOD release</th>
<th>DVD release</th>
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<tbody>
<tr>
<td>Bulgaria</td>
<td>12th June 2015</td>
<td>12th June 2015</td>
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<tr>
<td>Belgium</td>
<td>8th June 2015</td>
<td>10th June 2015</td>
<td>10th June 2015</td>
<td>n/a</td>
</tr>
</tbody>
</table>

- **Similar titles:**
  - *La Vie d’Adèle / Blue Is The Warmest Color* (2013) by Abdellatif Kechiche
  - *Q / Desire* (2011) by Laurent Bouhnik

- **Promotional strategy – common pan-European tools:**
  It was decided to develop two different strategies for the theatrical release and the VOD release.
  - For the theatrical release, we wanted to attract a female-oriented audience by presenting the film as an art-house film about a love story.
  - For the VOD release, however, we decided to put the emphasis on the sex scenes and the controversial aspect of the film in order to attract a male-oriented audience.

- **Local promotional campaigns:**
  - Belgium: In order to receive wide media coverage, a master class with Jacques Doillon was organised at the Brussels Film Festival (BRFF). The Cinémathèque launched a retrospective of the director’s previous films at the same time.
  - Spain: Jacques Doillon was invited to push the promotion of the film.

3. **Results**

No data are available at this time.
MADEMOISELLE C. by Fabien Constant

Director: Fabien Constant
Nationality: France – Year: 2013
Producers: Black Dynamique Films, Tarkovspop
Genre: documentary

Synopsis: Carine Roitfeld is French, and the most renowned fashion editor on the planet along with her opposite number at American Vogue, Anna Wintour. During her 10 years as editor-in-chief at Vogue Paris she was noted for her successes and scandals (“porno chic” was her creation). Last year, she left Vogue Paris with the greatest challenge to date, to create a new fashion magazine: CR, the ultimate fashion magazine, the most unpredictable, glamorous and innovative. CR will be the anti-Vogue. It will be even more chic, more exclusive, more ambitious. Having been granted unprecedented access, the aim of this documentary is to follow the making of a magazine from the first editorial meeting through to the extravagant launch party in New York. The filmmaker’s take on this subject is not to be too edgy but instead amusing and upbeat. Fashion, drama, power, models, all circle around this most iconic of fashion editors, the most Parisian, the Eiffel Tower in 12 cm heels: the irreverent Mademoiselle C. We, the viewers, are fully immersed in the creative process of producing a new magazine: the “just to see” photo shoots for the pilot issue that get trashed and do not make it into the magazine, the chaos of fashion week, greeting the designers, previewing new collections, press trips, glamorous soirees, choosing photographers, finding new talents, creating surprise, photo shoot disasters, shopping expeditions, award ceremonies, front row, backstage. This is the hectic life of one of the few people in the world who does not make the wheel of fashion turn, but has the wheel of fashion turning around her. But above all else, behind the surface glamour, this film takes the viewer behind the fantasy and tries to understand the way the fashion industry really functions.

On this journey... Karl Lagerfeld, Kanye West, Riccardo Tisci, Albert Elbaz, Jean-Paul Gaultier, Puff Daddy, Alicia Keys, Cassie, Cate Blanchett, Diane Von Furstenberg, Mario Sorrenti, Natalia Vodianova, Proenza Schouler, Alexander Wang, Donatella Versace, Mario Testino, Matthew Avedon, Nick Knight, Tom Ford to name but a few.

Distributors: BiM Distribuzione (Italy); Wild Bunch Germany (Germany); Vertigo (Spain)
International sales: Elle Driver

Key arguments in the selection of this title for the Speed Bunch project:
- Carine Roitfeld is a famous personality of the fashion world business, which is a key element to define a target audience in each one of the territories.
- Documentaries sell well on VOD

2 day-and-date releases and 1 direct-to-VOD release
- Theatre: June 20, 2014 in Italy and June 21 in Spain
- VOD: June 20, 2014 in Italy and June 21 in Spain and Germany

3 territories
- Italy, Germany and Spain

3 languages
- Italian, German and Spanish
Marketing

- **Common release date**: choice of a common release date taking into account regulations applicable in France, the respective line-ups and markets of each distributor and following one rule: release the film in all territories and on all medias concerned within the shortest possible time-frame.
MAGNIFICA PRESENZA by Ferzan Ozpetek

Magnifica Presenza (Austria and France)
A Magnificent Haunting (UK and Ireland)

Director: Ferzan Ozpetek (9th film feature)
With Elio Germano, Paola Minaccioni, Beppe Fiorello
Nationality: Italy – Year: 2012
Producers: Fandango, Faros Film, Rai Cinema
Genre: comedy
Festivals: Moscow International Film Festival, Montreal World Film Festival, Cinema Made in Italy (London), Brussels Mediterranean Film Festival

Synopsis: Twenty eight year old Pietro, a lonely soul who works nightshifts in a bakery, has just moved to Rome into a beautiful apartment which is badly in need of repair but crucially has low rent. He soon starts noticing objects have been moved and there are strange noises coming from empty rooms...

Distributed by: Distrib Films (France), Film Laden (Austria) and Peccadillo Pictures (UK and Ireland).
International sales: Fandango Portobello
Film suggested to TIDE by Fandango Portobello as from December 2012 among 6 other films.

3 day-and-date releases, 1 VOD preview release

4 territories
• Austria, France, Ireland and United Kingdom

3 languages
• German, English and French

11 VOD platforms
• Multiterritorial: iTunes (4 local stores)
• Austria: FilmLaden VOD, Filmmit
• France : La Vod d’Orange
• Ireland: Volta
• United Kingdom: Blinkbox, Distrify, Filmflex

32 screens

1. Marketing

Joint positioning
- **Target audience**: over-30s, occasional or regular cinema-goers for commercial and Art House films.

- **Release dates**: initially fixed around summer 2013; the distributor Peccadillo Pictures finally preferred to release the film in the autumn and focus his strategy on the fantastic aspect of the film (rather than the "Italian summer comedy" approach chosen by the two other distributors).

<--- 16-week cycle --->

<table>
<thead>
<tr>
<th>Release dates</th>
<th>S28</th>
<th>S29</th>
<th>S30</th>
<th>S31</th>
<th>S32</th>
<th>S33</th>
<th>S34</th>
<th>S35</th>
<th>S36</th>
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<th>S38</th>
<th>S39</th>
<th>S40</th>
<th>S41</th>
<th>S42</th>
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<tbody>
<tr>
<td>France*</td>
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<tr>
<td></td>
<td>10/07/2013 (VOD)</td>
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<td></td>
<td>31/07/2013 (theatre)</td>
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</table>

* in France, *Magnifica Presenza* was released on VOD 3 weeks (10 July) before the theatrical release (31 July) and its VOD preview exploitation ceased the day before theatrical release.

- **Comparisons**:
  - *His Secret Life* (2001) by Ferzan Ozpetek
  - *La Finestra di fronte* (2003) by Ferzan Ozpetek
  - *Saturno Contro* (2008) by Ferzan Ozpetek
  - *Mine Vaganti* (2010) by Ferzan Ozpetek
  - *Un Giorno Speciale* (2012) by Francesca Comencini

- **Pooled tools**: pan-European promotion, slightly disturbed by specific local market positioning. The European distributors chose slightly different marketing positions in different countries, either stressing the "Italian summer comedy" genre of *Magnifica Presenza* or its fantastic aspect.
  - an extended release period: between July/August (for France and Austria) and the Christmas holidays for the UK and Ireland;
  - two posters: one for exploitation in Austria, Ireland and the UK, the other for France only.
  - Nevertheless, consensus was reached concerning several joint actions:
    - a common trailer for all territories;
    - a joint participative social media campaign (via geolocalization) based on pooled marketing materials;
    - no real consensus on the positioning of the film (between Italian comedy and "fantastic").

**Local promotion campaigns (and cross-border tools):**
A genuine attempt by distributors to create and implement innovative cross-cutting tools for both modes (theatre and VOD) and go beyond the traditional parallel campaigns for the two supports:

- systematic mention of the two platforms concerned (and when applicable the two release dates);
- space purchases; contacts with the press; etc.

However this special effort often ran up against the habits of the profession. Film journalists covered only the theatrical releases, despite the still-exceptional nature (at least in Austria and France) of (quasi)simultaneous releases.
**TIDE**

**MASTER OF THE UNIVERSE** by Marc Bauder

**Directed by** Marc Bauder

**Nationality:** Germany/Austria – **Year:** 2013

**Producers:** Bauder Films; NGF Geyrhalter Film

**Production Budget:** 276,294 Euros

**Genre:** documentary

**Festivals:** Prix SRG SSR de la Semaine de la critique du Festival du Film de Locarno 2013, Best Documentary

**European Film Awards 2014**

**Synopsis:** Investment bankers are the real Masters of the Universe, not politicians, armies or even countries. In economic powerhouse Germany, a top banker gives a disturbing insider’s account of his emotions, motivations and predictions. Revealing a parallel universe of extreme income and merciless pressure.

**Distributors** Héliotrope Films (France), Nomad Films (Italy), Amstel Film (The Netherlands), CineDoc (Greece), Gutek Films (Poland).

**Sales Agent:** Autlook Film Sales

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**4 day-and-date releases, 1 avant-première VOD release**

**5 European territories**

- France, Italy, The Netherlands, Greece and Poland

**5 languages**

- French, Italian, Greek, Dutch and Polish

**21 VOD platforms**

- Multi-territory: iTunes (5 local stores), Google (2 local stores),
- France: La Vod d’Orange, FilmoTV, Universciné, Vodeo.tv (Video-en-Poche),
- Italy: Mubi, MyMovies
- The Netherlands: Mubi, KPN, Tele 2, Moviemaxonline, Mejane, Videoland
- Poland: VOD.pl

**34 screens (1st week)**
Marketing

Target audiences:

Primary target: Mostly men between 25 and 50 years old, highly educated, with interests on the financial systems, geopolitics, non-frequent cinemagoers but users of VOD platforms.

Secondary target: Mostly women between 25 and 50 years old, highly educated, urban, relatively frequent cinemagoers.

Communities and niches: Bankers, Ex-bankers, University students (related careers), Politically engaged, predominantly leb-wing oriented, belonging to the parties and movements “sick-of-it-all-in-Europe”, “indignados”. Non-moviegoers (VOD target).

Release dates:

<table>
<thead>
<tr>
<th>Master of the Universe</th>
<th>Release dates</th>
<th>S40</th>
<th>S46</th>
<th>S47</th>
<th>S48</th>
<th>S49</th>
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<tbody>
<tr>
<td>The Netherlands</td>
<td>02/10/2014</td>
<td></td>
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<td>Greece</td>
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<td>Poland</td>
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</tbody>
</table>

* in France, *Master of the Universe* was released on VOD 2 weeks (November 12) before the theatrical release (November 26) and its VOD preview exploitation ceased the day before theatrical release.

Comparisons:

Pooled and pan-European promotional tools:
A genuine consensus on the positioning of the film made it possible to:
- Fully develop a common visual identity and aim at pan-European awareness: common poster, trailer, an asset locker with social media friendly materials such as facts, blog articles, graphic materials, infographics. These were shared from the distributors’ social media profiles.
- Encourage cross-cutting promotion. Thus the shared Web site informed audiences about different release sites (links to VOD platforms and theatres);
- Launch new joint promotion actions: videoseeding (placing of trailer on targeted sites with advertising message (call to action), actions targeting specialized cinema bloggers (SEO) and launch of a dedicated operation (with live streaming on Youtube) of an interview of Rainer Voss, the main protagonist of the documentary, in Strasburg and moderated by Marc Roche (journalist). This event was used for promotion on social media and through bloggers.
MELODY by Bernard Bellefroid

Directed by Bernard Bellefroid
With – Rachael Blake, Lucie Debay.
Production country: Belgium—Production year: 2014
Producers: Artémis Productions
Genre: drama
Festivals: Montréal Film Festival, International Film Festival Rotterdam, Transilvania International Film Festival.
Synopsis: Two women: one a rich, single businesswoman aged 48, the other a homeless hairdresser with a dream. These two very different lives are brought together by a pregnancy. Poignant, emphatic and strongly acted drama that asks questions about motherhood and childhood. Who takes care of who? And what makes a good mother?
Distributed by: Cinéart (The Netherlands).
International Sales: Doc&Film International

7 sorties day-and-date

7 territoires
- The Netherlands, Poland, United Kingdom, Serbia, Spain, Slovenian, Bosnia-Herzegovina

6 langues
- Dutch, Polish, English, Serbian, Spanish, Slovenian.

2 plateformes VOD
- Multiterritoire: Distrify
- Spain: Filmin

28 salles

Marketing strategy
See Marketing strategy Atlantic.
## Audience numbers

### Audience in cinemas

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of cinemas (TOTAL)</th>
<th>Audience numbers (TOTAL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>13</td>
<td>527</td>
</tr>
<tr>
<td>Poland</td>
<td>5</td>
<td>112</td>
</tr>
<tr>
<td>UK</td>
<td>4</td>
<td>32</td>
</tr>
<tr>
<td>Slovenia</td>
<td>1</td>
<td>59</td>
</tr>
<tr>
<td>Spain</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>Serbia</td>
<td>3</td>
<td>130</td>
</tr>
<tr>
<td>Bosnia-Herzegovina</td>
<td>1</td>
<td>34</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>28</strong></td>
<td><strong>909</strong></td>
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</tbody>
</table>

### VOD numbers

<table>
<thead>
<tr>
<th>Platform</th>
<th>Number of platforms</th>
<th>Platforms</th>
<th>Total views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poland, UK, Serbia, Slovenia, Bosnia and Herzegovina</td>
<td>1</td>
<td>Distrify</td>
<td>1</td>
</tr>
<tr>
<td>Spain</td>
<td>1</td>
<td>Filmin</td>
<td>1026</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1</strong></td>
<td></td>
<td><strong>1027</strong></td>
</tr>
</tbody>
</table>
THE KEEPER OF LOST CAUSES
By Mikkel Norgaard

Directed by Mikkel Norgaard
Nationality: Danish – Production year: 2013
Producers: Zentropa Entertainment
Production Budget: 5M€
Genre: Thriller
Festivals: Official Selection – Out of Competition International Beaune International Thriller Film Festival

Synopsis: Following a shootout that left his two partners respectively dead and paralyzed, chief detective Carl Mørck is assigned to the newly established Department Q, a department for old, terminated cases. The department consists only of himself and his new assistant Assad. Although they get explicit orders to only read and sort through the cases, only a single day passes before Carl’s stubborn nature throws them headfirst into the mystery of Merete Lynggaard’s disappearance; a well-known female politician who vanished five years ago from a passenger ferry. The only witness is her brain-damaged brother who was found on the car deck, screaming at the top of his lungs. The case was put to rest as an apparent suicide. Unconvinced by this explanation Carl and Assad venture on a journey that will take them deep into the undercurrent of abuse and malice that lurks beneath the polished surface of Scandinavia.

The Keeper of Lost Causes is the first title adapted from the famous books of Jussi Adler-Olsen. The second one, The Absent One, is also link to the following experimental releases.

Distributors: Wild Side/Wild Bunch Distribution (France); Vertigo (Spain)
Sales agent: Trusk Nordisk
1. **Key arguments in the selection of this title for the Speed Bunch project:**

   - International success of the books: The book *The Keeper of Lost Causes* by Jussi Adler-Olsen was published in 2007 and is so far followed by four books in the series about Department Q. The books have been awarded with numerous prizes and have been placed on several bestseller lists both nationally and internationally. In October 2012, Jussi Adler-Olsen received the Barry Award in the US for Best Novel of the Year and in August 2012 *The Keeper of Lost Causes* made it to the New York Times bestseller list. The books in the series have been sold to more than 35 countries and sold in more than 7 million copies worldwide.
   - Success of the thrillers such as *True Detective, Millenium*...
   - By the scriptwriter of *Millenium*
   - #1 of the Scandinavian box office

2. **Marketing**

3. **Positioning**

   High standard European thrillers—adapted from best-sellers—a same scriptwriter as *Millenium*
Target
Men/women, 35+, UMC++, urban, thriller film and literature fans
Men/women, 25+, UMC+, urban, thriller film and literature fans, frequent viewers in circuit cinemas.

Common release date: choice of a common release date taking into account respective line-ups and markets of each distributor and following one rule: release the film in all territories and on all medias concerned within the shortest possible time-frame

Release dates:

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 27</td>
<td>Screening in the Official Selection Out of Competition of the Beaune International Thriller Film Festival</td>
</tr>
<tr>
<td>March 28</td>
<td>Closing night with the screening of THE ABSENT ONE in the Official Selection Out of Competition of the Beaune International Thriller Film Festival</td>
</tr>
<tr>
<td>April 8</td>
<td>France Theatrical release of THE ABSENT ONE</td>
</tr>
<tr>
<td>June 5</td>
<td>Spain Theatrical release of THE KEEPER OF LOST CAUSES</td>
</tr>
<tr>
<td>July 3</td>
<td>Spain VOD release of THE KEEPER OF LOST CAUSES simultaneously to the theatrical release of THE ABSENT ONE</td>
</tr>
</tbody>
</table>

Share visual identity for the two titles: use of the same designer to draw up a joint graphics charter (common poster, trailer, etc.). However, freedom for each distributor to adapt to his own market and the expectations of his local audience.

Common marketing strategy for the two films and also for the two territories: cross promotion between the two titles and between the different targeted media (VOD & theatrical). Here are some examples of the implemented marketing and promotion tools:

- Double poster display
- Common teaser & trailer promotion in theatres about 3 weeks before the release
- Spot TV campaign to promote the license
- Press campaign
- Web campaign
- Social media campaign
- Relaunching of the books and crosspromotion books/films in collaboration with the editors (ie. distribution of bookmarks promoting the films during the book fair and in bookstores)
- Premieres events:
- Premiere in the presence of main actor Fares Fares and the producer and one premiere followed by a Q&A on e-cinema animated by Wild Side and Wild Bunch Distribution in France
- Premiere with contest to win tickets with some partners such as Fnac or Filmin in Spain
  - Promotion by the Danish Embassies
SPEED WALKING by Niels Arden Oplev

Directed by: Niels Arden Oplev
With: Villads Boye, Sidse Babett Knudsen, Pilou Asbaek
Production country: Denmark — Production year: 2014
Producers: Nordisk Film, Production A/S
Budget Production: 3.016.280 euros
Genre: drama

Festivals: Chicago International Film Festival, Thessaloniki International Film Festival, Tallinn Black Nights Film Festival, International Film Festival Rotterdam, Göteborg International Film Festival, Beijing International Film Festival.

Synopsis: Bitter-Sweet coming-of-age comedy about 14-year-old Martin. The sudden death of his mother puts his rite of passage from boy to man in a higher gear. With 1970s clothing and music, racing hormones and refined supporting roles from Borgen start Sidse Babett Knudsen and Pilou Asbaek.

International Sales: TrustNordisk

9 sorties day-and-date
9 territoires
- The Netherlands, Luxemburg, Poland, United Kingdom, Serbia, Spain, Slovenia, Italy, Bosnia-Herzegovina
7 langues
- Dutch, Polish, English, Serbian, Slovenian, Spanish, Italian
2 plateformes VOD
- Multiterritoire: Distrify
- Spain: Filmin
29 salles
Marketing strategy
See Marketing strategy Atlantic

Audience numbers

Audience in cinemas

<table>
<thead>
<tr>
<th>Number of cinemas (TOTAL)</th>
<th>Audience numbers (TOTAL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>11</td>
</tr>
<tr>
<td>Luxemburg</td>
<td>1</td>
</tr>
<tr>
<td>Poland</td>
<td>5</td>
</tr>
<tr>
<td>UK</td>
<td>4</td>
</tr>
<tr>
<td>Serbia</td>
<td>3</td>
</tr>
<tr>
<td>Spain</td>
<td>1</td>
</tr>
<tr>
<td>Italy</td>
<td>3</td>
</tr>
<tr>
<td>Serbia</td>
<td>3</td>
</tr>
<tr>
<td>Bosnia-Herzegovina</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
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VOD numbers

<table>
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<tr>
<th>Number of platforms</th>
<th>Platforms</th>
<th>Total views</th>
</tr>
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<tbody>
<tr>
<td>Poland, UK, Serbia, Slovenia, Italy, Bosnia and Herzegovina</td>
<td>Distrify</td>
<td>3</td>
</tr>
<tr>
<td>Spain</td>
<td>Filmin</td>
<td>132</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>135</td>
</tr>
</tbody>
</table>
THE SKY ABOVE US by Marinus Groothof

Directed by Marinus Groothof
With  Nada Sargin, Boris Isakovic, Nikola Rakocevic
Production country: The Netherlands—Production year: 2015
Producers: CTM Pictures, Entre Chien et Loup, Art & Popcorn, Heretic
Genre: drama
Festivals: International Film Festival Rotterdam, Belgrade Film Festival, Jeonju International Film Festival
Synopsis: While NATO has been bombing military and civilian targets for months in 1999, three inhabitants of Belgrade attempt to lead a more or less normal life in spite of all the death around them. The city itself is not only a backdrop but also a protagonist in this story of fear, love, loyalty and the madness of war.
Distributed by: September Film (The Netherlands).
International Sales: Doc&Film International

7 sorties day-and-date

7 territoires
- The Netherlands, Poland, United Kingdom, Serbia, Spain, Slovenian, Bosnia-Herzegovina

6 langues
- Dutch, Polish, English, Serbian, Spanish, Slovenian.

2 plateformes VOD
- Multiterritoire: Distrify
  Spain: Filmin

25 salles

1 TV channel (in The Netherlands: KPN)
Marketing strategy
See Marketing strategy Atlantic.

<table>
<thead>
<tr>
<th></th>
<th>Number of cinemas (TOTAL)</th>
<th>Audience numbers (TOTAL)</th>
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</thead>
<tbody>
<tr>
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<td>841</td>
</tr>
<tr>
<td>Poland</td>
<td>5</td>
<td>113</td>
</tr>
<tr>
<td>UK</td>
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<td>40</td>
</tr>
<tr>
<td>Serbia</td>
<td>3</td>
<td>196</td>
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<tr>
<td>Spain</td>
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<td>8</td>
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<tr>
<td>Italy</td>
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<td>72</td>
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<td>Bosnia-Herzegovina</td>
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<td>Total</td>
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TV numbers

<table>
<thead>
<tr>
<th></th>
<th>Number of channels</th>
<th>Channel</th>
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<tbody>
<tr>
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<tr>
<td>Total</td>
<td></td>
<td></td>
<td>34000</td>
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VOD numbers

<table>
<thead>
<tr>
<th></th>
<th>Number of platforms</th>
<th>Platforms</th>
<th>Total views</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Netherlands, Poland, UK, Serbia, Italy, Bosnia and Herzegovina</td>
<td>1</td>
<td>Distrify</td>
<td>3</td>
</tr>
<tr>
<td>Spain</td>
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<td>Filmin</td>
<td>405</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>408</td>
</tr>
</tbody>
</table>
THE SPIRIT OF ’45 by Ken Loach

Directed by Ken Loach
Nationality: UK – Year: 2013
Producers: Sixteen Films
Genre: documentary, history
Festivals: Berlinale Special 2013

Synopsis: 1945 was a pivotal year in British history, when great changes in the post-war social and political landscape helped redefine how Britain was run. The film is about the spirit of a new kind of socialism that shaped that era, and reflects upon where those ideals are now.

Distributors: BiM Distribuzione (Italy) ; Cinéart (Benelux) ; Vertigo (Spain) ; Wild Bunch Germany (Germany) ; Wild Side (France – VOD rights only)
International sales: Wild Bunch

Key arguments in the selection of this title for the Speed Bunch project:
- Ken Loach is a great name in European cinema
- Ken Loach displays a genuine desire to innovate and a definite interest in this type of test, as witnessed by the release plan for the film in the United Kingdom (http://www.thespiritof45.com/)
- Documentaries sell well on VOD

3 day-and-date releases, 1 direct-to-VOD release and 1 traditional VOD release
- Theatre: September 4, 2013 in Belgium, September 12 in Italy and September 13 in Spain
- VOD: September 13 in all territories and on all platforms

7 territories
- Belgium, France, Germany, Italy, Luxemburg, Netherlands and Spain

5 languages
- Dutch, French, german, Italian and Spanish

26 VOD platforms
- Multiterritorial: iTunes (7 local stores)
- France: FilmoTV, CanalPlay, Orange, SFR, Videofutur, GooglePlay
- Italy: Chili, Cubovision, OwnAir, MyMovies
- Spain: Filmin, Wuaki, Nubeox, Canal+, Yomvi, Ono, Movistar
- Benelux: Belgacom, Voo et UniversCiné

33 cinemas
• **Common release date:** choice of a common release date taking into account regulations applicable in France, the respective line-ups and markets of each distributor and following one rule: release the film in all territories and on all medias concerned within the shortest possible time-frame.

<table>
<thead>
<tr>
<th>Territory</th>
<th>Sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Le nouvel Obs, Culture G, Evene.fr, Deezer</td>
</tr>
<tr>
<td>Germany</td>
<td>History.de, Spiegel.de, Taz.de</td>
</tr>
<tr>
<td>Spain</td>
<td>Ccoo, Notodo.com, Fnac, The Cult</td>
</tr>
<tr>
<td>Italy</td>
<td>Il Fatto Quotidiano, MyMovies, Facebook</td>
</tr>
<tr>
<td>Benelux</td>
<td>Lalibre.be, Lesoir, BeTV</td>
</tr>
</tbody>
</table>

- **Shared visual identity:** use of the same designer to draw up a joint graphics charter. However, freedom for each distributor to adapt to his own market and the expectations of his local audience.

- **Common bonus:** Exclusive interview of Ken Loach by FilmoTV made available to all distributors.
  - Multiterritorial platform: iTunes
    - Promotion on home pages of local stores (sliders+bricks)
    - Promotion on iTunes Facebook pages
  - Local platforms: highlighting on their home pages, promotion in their newsletters, exclusive content (extracts, interview of Ken Loach by FilmoTV)

- **Promotion on social media** of distributors' VOD platforms

- **Web campaign:** targeted by territory with banners mentioning the VOD release and also the theatrical release for the countries concerned.

- **Press coverage** with articles in national newspapers and competitions to win cinema tickets. Despite an effort to highlight the experimental aspect of day-and-date releases, few articles mentioned this information.

- **Event-type previews:**
  - Italy: final evening of a workshop devoted to the economy and social protection in the presence of Wilma Labate (Italian director), Elio Germano (Italian actor - best actor award in Cannes in 2010) and Giovanni Spagnoletti (film critic)
  - Spain: preview in partnership with Sensacine introduced by a historian and special preview for CC.OO, major Spanish trade-union.

- **Search for European partnership:** In the name of all the distributors of the group, Vertigo launched negotiations with History Channel and National Geographic in order to obtain a TV screening of *THE SPIRIT OF ’45* simultaneously in all the territories. While these negotiations did not lead to an agreement, they did make it possible to promote the Speed Bunch project and the preparatory action to channels in several European territories. The distributors keep in mind the idea of concluding a multi-territorial TV sales deal for forthcoming titles in the project.
AU BOUT DU CONTE by Agnès Jaoui

*Under the Rainbow* (UK & Ireland)
*Un Cuento Francés* (Spain)
*Френска приказка* (Bulgaria)

**Directed by** Agnès Jaoui
**With** Agnès Jaoui, Jean-Pierre Bacri, Agathe Bonitzer, Arthur Dupont
**Country:** France – **Production year:** 2012
**Producers:** Memento Films Production, La Cinéfacture, France 2 Cinéma, Hérodiade
**Production Budget:** 1 666 510 euros
**Genre:** Comedy
**Festivals:** Vancouver International Film Festival, Hamptons International Film Festival, Chicago International Film Festival, Seminci Film Festival

**Synopsis:** Laura is still waiting for Prince Charming at the age of 24. So when Sandro appears at a party exactly like her prince would be in her dreams, she thinks she’s found the right one. But then again when she meets Maxime, Laura starts to wonder if some Princes can be more charming than other. Of course Sandro has problems of his own: his father, Pierre, just bumped into Madam Irma at his father’s funeral and this reminded him of the date of his own death which Madam Irma had predicted ages ago. Now Pierre is unable to make any plans, not with his new partner Eleonore, nor with Sandro. And Maxime has his own problems, and so does Eleonore, Marianne, Jacqueline and many other. But don’t worry, in the end, they’ll all live happily ever after.

**Distributed by:** Artificial Eye & Curzon (UK & Ireland), Filmin & Cameo (Spain), Art Fest & NetCinema (Bulgaria)
**Sales Agent:** Memento Films International

---

**4 day & date releases**

**4 territories**
- United Kingdom, Ireland, Spain, Bulgaria

**3 languages**
- English, Spanish, Bulgarian

**8 VOD platforms**
- United Kingdom & Ireland: CHC/BT, iTunes, Filmflex
- Spain: Filmin, iTunes, Ara TV
- Bulgaria: NetCinema

**23 prints (1st week)**
Marketing

Global positioning

- Targeted Audience: women aged 30 to 45, urban, rom com lovers

- Release dates: unlike the UK, Irish and Bulgarian distributors, who decided to release the film simultaneously on all distribution channels, the Spanish distributors feel it would be best to delay the VOD and DVD releases compared to the theatrical release in order to maximise the number of screens and to keep the film on those screens as long as possible (6 weeks in total, therefore the film could be seen simultaneously on screen and on VoD for 4 weeks).

<table>
<thead>
<tr>
<th>Film Title</th>
<th>Premiere</th>
<th>Theatrical release</th>
<th>VOD release</th>
<th>DVD release</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK &amp; Ireland</td>
<td>-</td>
<td>27/06/2014</td>
<td>27/06/2014</td>
<td>n/a</td>
</tr>
<tr>
<td>Spain</td>
<td>19/06/2014</td>
<td>20/06/2014</td>
<td>04/07/2014</td>
<td>09/07/2014</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>18/09/2014</td>
<td>19/09/2014</td>
<td>19/09/2014</td>
<td>n/a</td>
</tr>
</tbody>
</table>

- Similar titles:
  - *Alceste à Bicyclette/ Cycling with Moliere* (2013) by Philippe Le Guay

- Promotional strategy - common pan-European tools:
  - It was decided to present the film the same way on all four territories. In France, the distributor took advantage of Agnès Jaoui and Jean-Pierre Bacri’s fame to launch the film, however, they are not very famous actors in other countries, so it was decided to present the film as a romantic comedy and to highlight the couple played by Agathe Bonitzer and Arthur Dupont on the poster. The Spanish and Bulgarian posters both show the couple only. On the English poster, the couple is in the foreground while Agnès Jaoui and Jean-Pierre Bacri are in the background.
  - Even though Jean-Pierre Bacri’s character is a typical comedy character (he plays the grumpy one), it was decided to not put the emphasis on him for the promotional campaign.

Local promotional campaigns:

- In the UK and Ireland, the film was advertised mostly through social media: the poster was launched on Artificial Eye’s Facebook page, and the trailer was published on YouTube and then pushed through Facebook and Twitter.

- In Spain, the distributor developed a strategy based on the French aspect of the film. They wanted to create a link between French elegance and the fairy tale side of the film, so they organised a series of macaroon tastings for the premiere (where Agnès Jaoui was also present). There was also a lot of media coverage (in newspapers and local radios, and on websites) due to the presence of the director at the premiere.

- In Bulgaria, the premiere was presented by the director of photography of the film (who is Bulgarian). For this market, it was decided to focus on the fairy tale aspect of the film. As a consequence, a number of fairy-tale-related activities were organised for the premiere.
## Results

### Theatrical results

<table>
<thead>
<tr>
<th></th>
<th>NUMBER OF THEATERS (1&lt;sup&gt;st&lt;/sup&gt; week)</th>
<th>NUMBER OF THEATERS (TOTAL)</th>
<th>NUMBER OF ADMISSIONS (1&lt;sup&gt;st&lt;/sup&gt; week)</th>
<th>NUMBER OF ADMISSIONS (4&lt;sup&gt;th&lt;/sup&gt; week)</th>
<th>NUMBER OF ADMISSIONS (8&lt;sup&gt;th&lt;/sup&gt; week)</th>
<th>NUMBER OF ADMISSIONS (TOTAL)</th>
<th>GROSS BOX OFFICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>11</td>
<td>11</td>
<td>1,482</td>
<td>234</td>
<td>0</td>
<td>3,417</td>
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<td>269</td>
<td>155</td>
<td>2,039</td>
<td>£13,254 / €18,604.71</td>
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<tr>
<td>Bulgaria</td>
<td>4</td>
<td>4</td>
<td>165</td>
<td>18</td>
<td>10</td>
<td>660</td>
<td>€1,949</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>40</strong></td>
<td><strong>2,743</strong></td>
<td><strong>521</strong></td>
<td><strong>165</strong></td>
<td><strong>6,116</strong></td>
<td><strong>€4,216.71</strong></td>
</tr>
</tbody>
</table>

### VOD results

<table>
<thead>
<tr>
<th></th>
<th>NUMBER OF PLATFORMS</th>
<th>PLATFORMS</th>
<th>VIEWS (Weeks 1-4)</th>
<th>VIEWS (Weeks 4-8)</th>
<th>TOTAL VIEWS</th>
<th>GROSS RECEIPTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>3</td>
<td>Filmin, Ara TV, Itunes</td>
<td>115</td>
<td>31</td>
<td>227 (Itunes + 594)</td>
<td>€553.88 (Itunes receipts excluded)</td>
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<tr>
<td>UK &amp; Ireland</td>
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<td>CHC/BT, FILMFLEX and iTUNES</td>
<td>-</td>
<td>-</td>
<td>331</td>
<td>£1,234 / €1,732.17</td>
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<tr>
<td>Bulgaria</td>
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<td>NetCinema.bg</td>
<td>16</td>
<td>4</td>
<td>25</td>
<td>€25</td>
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<tr>
<td><strong>Total</strong></td>
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<td><strong>35</strong></td>
<td></td>
<td><strong>583</strong></td>
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### DVD results

<table>
<thead>
<tr>
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<th>UNITS SOLD</th>
<th>GROSS RECEIPTS</th>
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<tbody>
<tr>
<td>Spain</td>
<td>844</td>
<td>€4,237.70</td>
</tr>
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</table>
VIRAMUNDO by Pierre-Yves Borgeaud

**Director:** Pierre-Yves Borgeaud (2nd film)
**With** Gilberto Gil
**Nationality:** Switzerland / France - **Year:** 2013
**Producers:** Dreampixies, Urban Factory
**Genre:** documentary
**Festival:** Visions du Réel Film Festival 2013

**Synopsis:** After decades of sold out shows and international recognition, musician Gilberto Gil embarks on a new kind of world tour through the southern hemisphere. From Bahia, he travels to the land of the Aborigines of Australia and the townships of South Africa, ending in the Brazilian Amazon region. With the same passion, Gil continues the work he began as Brazil’s first black Minister of Culture – promoting the power of cultural diversity in a globalized world and sharing his vision for our future: a diverse, interconnected planet filled with hope, exchange… and of course music!

**Distributed by:** Alambique (Portugal), BrunBro Films (Benelux), Gutek Film (Poland), Kaunas International Film Festival (Lithuania), Nomad Films (Italy), Urban Distribution (France) & Soda Pictures (Ireland and UK).
**International sales:** Urban Distribution International

Film proposed by Urban Distribution International as from December 2012 among eight other films.

8 day-and-date releases, 1 VOD preview release, 1 direct-to-VOD release

10 territories
- Belgium, France, Ireland, Italy, Lithuania, Luxemburg, Netherlands, Poland, Portugal and United Kingdom.

7 languages
- Dutch, English, French, Italian, Lithuanian, Polish and Portuguese.

26 VOD platforms
- Multiterritorial: iTunes (10 local stores)
- Belgium: UniversCiné
- France: La VoD d’Orange
- Ireland/UK: Curzon-on-demand, Blinkbox, The Guardian
- Italy: MyMovie, FilmIt
- Lithuania: Gala
- Netherlands: Universcine
- Poland: Kinoplex
- Portugal: MEO, Vodafone, Screenburn, Vodafone, Optimus, Cabovisao

100 cinemas
Marketing

Joint positioning

- **Target audience**: women over 30, world music, interested in cultural, social and environmental questions, not necessarily film fans but keen to watch documentaries...

- **Release dates**: initially fixed before/during summer, but the Benelux distributor preferred to postpone the release to the autumn (Belgium) and benefit from buzz that might be created by the Ghent Festival. The release period thus spanned 19 weeks.

<--- 19-week cycle --->

| Release dates | S16 | S17 | S18 | S19 | S23 | S24 | S25 | S26 | S27 | S28 | S29 | S30 | S33 | S34 | S46 |
|---------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| France*       |     |     |     | VOD |     |     |     |     |     |     |     |     |     |     |     |
| 17/04/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| (VOD)         |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 08/05/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| (salle)       |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| Lux           |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 05/06/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| Lithuania     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 20/06/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| Poland        |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 28/06/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| Italy         |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 10/07/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| UK            |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 26/07/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| Ireland       |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 26/07/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| N’lands       |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 15/08/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| Portugal      |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 22/08/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| Belgium       |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
| 13/11/2013    |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |

* In France, **Viramundo** was released on VOD 3 weeks (17 April) before the theatrical release (8 May) and its VOD preview exploitation ceased the day before theatrical release.

Comparisons:

- **Buesna Vista Social Club** (1999) by Wim Wenders
- **Baraka** (1999) by Ron Fricke
- **Benda Bilili** (2010) by Renaud Barret and Florent de La Tullaye
- **Marley** (2012) de Kevin Macdonald

**a single visual identity and pooled tools**: the European distributors reached a broad consensus as to the choice of focusing promotion on the cultural and political personality of Gilberto Gil and/or the "world music" angle developed in the documentary. The popularity of Gilberto Gil varies considerably from one country to another: very popular in Portugal but unknown in Poland or Lithuania.

- a common poster and trailer (France nevertheless chose to adapt the common trailer so as to underline the political personality of Gilberto Gil);
- a joint participative social media campaign (via geolocalization) based on pooled marketing materials.

In addition, most distributors had focused their local marketing on Gilberto Gil and his participation in local events (concerts, interview, etc.). But unfortunately his tour schedule did not allow him to respond to all these demands.

**Local promotion campaigns (and cross-border tools):**
In most countries promotion was based on a fairly traditional model:

- juxtaposition of two parallel strategies, each linked to one platform, with no real pooling,
- a strategy oriented more towards the theatre than towards VOD

Nevertheless in several countries these unusual releases enabled distributors to form partnerships with local VOD platforms. Thus, in Poland and Lithuania (countries where it was perhaps difficult to change the habits of web users, accustomed to Internet piracy) communication actions were undertaken jointly by the platforms and the distributors.
WHITE SHADOW by Noaz Deshe

Directed by Noaz Deshe
Nationality: Italy/Germany – Year: 2013
Producers: Asmara Film, Chromosom Film
Production Budget: 256,611 Euros
Genre: fiction
Festivals: Venice International Film Critics Week (2013), Sundance Film Festival (2014)

Synopsis: WHITE SHADOW is the story of Alias, a young albino boy on the run. After witnessing his father’s murder, his mother sends him away to find refuge in the city. He’s brought to the care of his uncle, Kosmos, a truck driver struggling with a few small businesses. In the city, Alias is a quick learner, selling sunglasses, DVDs and mobile phones. He is fond of his uncle’s daughter, Antoinette, although his uncle disapproves. Gradually the city becomes no different than the bush and wherever Alias travels the same rules of survival apply.

Distributors: Premium Films (France), Amstel Film (The Netherlands), Aya Distribution (UK), Mozinet (Hungary), Kino Pasaka (Lithuania), Kloro Films (Romania)
Sales Agent: Premium Films

5 day-and-date releases, 1 avant-première VOD release

6 European territories
• France, Greece, Hungary, Lithuania, The Netherlands, Romania and United Kingdom

7 languages
• English, French, Greek, Hungarian, Lithuanian, Dutch and Romanian

23 VOD platforms
• Multi-territorial: iTunes (5 local stores), Google Play (3 local stores).
• Hungary: UPC, Telecom
• Lithuania: Kino.Lt
• The Netherlands: Pathe-Thuis, Videolandondemand.com, Mejane.com, moviemaxonline.eu, Mubi.com, UPC, Ziggo
• France: FilmoTV, le Service VOD de la télévision d’Orange
• Roumania: Mubi
• UK: Curzon Home Cinema, Amazon

50 screens (1st week) - TBC
Marketing

Joint positioning

Target audiences:
Primary target: Mostly women between 25 and 60 years-old, highly educated, urban, relatively-frequent cinemagoers.

Secondary target: Political and social engaged communities with responsibility for Africa.

Release dates:

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<th>White Shadow</th>
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<td>France*</td>
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<td>The Netherlands</td>
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* in France, White Shadow was released on VOD 2 weeks (February 25) before the theatrical release (March 11) and its VOD preview exploitation ceased the day before theatrical release.

Comparisons:
- White Material (2008) by Claire Denis
- Shooting Dogs (2005) by Michael Caton-Jones
- Desert Flowers (2009) by Sherry Hormann

Pooled and pan-European promotional tools:
A genuine consensus on the positioning of the film made it possible to:
- Create an asset locker with social media friendly materials such as facts, blog articles, graphic materials, infographics. These was shared from the distributors’ social media profiles.
- Encourage cross-cutting promotion. Thus the shared Web site informed audiences about different release sites (links to VOD platforms and theatres);
- Launch new joint promotion actions: videoseeding (placing of trailer on targeted sites with advertising message (call to action), actions targeting specialized cinema bloggers (SEO) and an important event-driven element: the director and talents visited Paris and London and we shot exclusive videos about their experience and contact with the audience. These videos were used across the other countries as well.