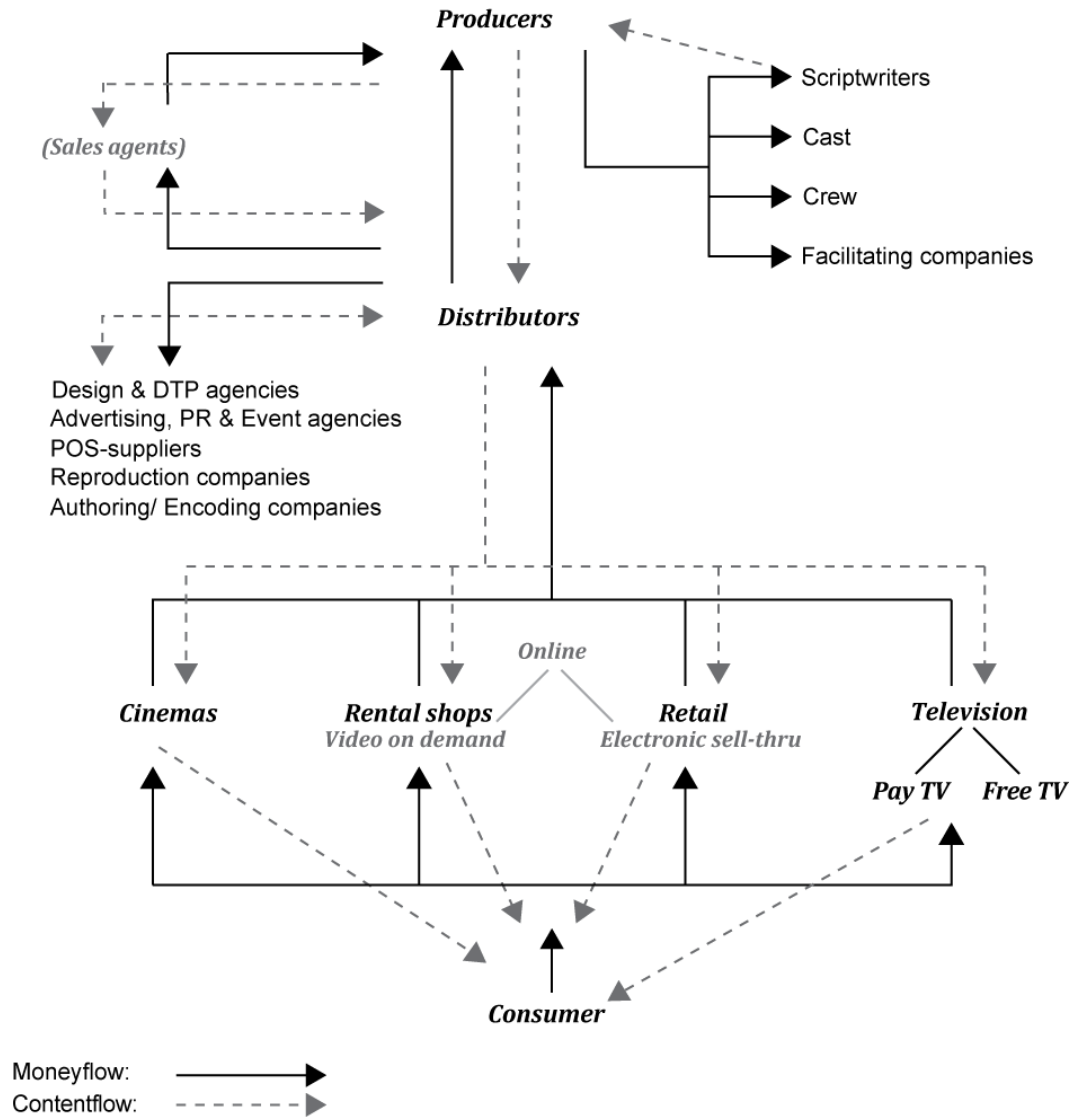


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Appendix 1 Supply chain of the film industry



Source: Derksen & Driessen (2007), 'vereenvoudigd stroomschema van de filmindustrie'.

Appendix 2.1 Market figures

	1999	2000	2001	2002	2003	2004	2005	2006	2007
Gross box-office x € 1.000	104.762 113.861	128.540 126.294	148.510 132.287	156.476 136.042	163.168 131.826	154.059 142.313	135.248 128.790	155.862 143.837	159.679 136.250
Admissions x 1.000	18.647 21.869	21.581 23.548	23.787 24.035	24.119 24.379	24.862 22.713	23.044 24.116	20.632 21.902	23.387 23.807	23.059 22.326
Population	15.760.225 10.213.752	15.863.950 10.239.085	15.105.285 10.263.414	16.105.285 10.309.725	16.192.572 10.355.844	16.258.032 10.396.421	16.305.526 10.445.852	16.334.210 10.511.382	16.357.992 10.584.534
Annual frequency per capita	1,18 2,14	1,36 2,30	1,49 2,34	1,50 2,36	1,54 2,19	1,42 2,32	1,27 2,10	1,43 2,26	1,41 2,11
Expenditure per capita (ECU/ €)	6,65 11,15	8,10 12,33	9,29 12,89	9,72 13,20	10,08 12,73	9,48 13,69	8,29 12,33	9,54 13,68	9,76 12,90
Average ticket prices (ECU/ €)	5,62 5,21	5,96 5,36	6,24 5,50	6,49 5,58	6,56 5,80	6,69 5,90	6,56 5,88	6,66 6,04	6,92 6,10
Index of ticket prices	100 100	103,59 100,33	103,31 100,51	103,40 100,34	102,31 102,81	102,80 102,63	99,31 99,74	99,32 100,14	101,60 99,30

Appendix 2.1.1 Market share by origin

	1999	2000	2001	2002	2003	2004	2005	2006	2007
National film productions	30 26	34 31	28 27	29 19	29 15	28 16	31 -	21 -	22 -
Market shares of domestic markets	5,0% 4,1%	5,5% 2,9%	9,5% 1,4%	10,0% 1,2%	12,5% 4,6%	8,8% 1,5%	10,9% 3,4%	11,3% 6,3%	13,4% -
Market shares of European films	14,3% 17,0%	4,8% 10,5%	5,4% 16,5%	9,7% 16,3%	10,8% 16,0%	9,2% 18,1%	10,3% 15,5%	9,9% 15,9%	19,1% -
Market shares of US films	79,6% 77,8%	85,6% 84,4%	84,1% 81,0%	79,3% 81,5%	75,9% 74,1%	74,1% 77,9%	75,7% 79,5%	76,9% 77,1%	65,7% -
Market shares of other films	1,1% 1,1%	4,1% 2,2%	1,0% 1,1%	1,0% 1,0%	0,8% 5,3%	7,9% 2,4%	3,1% 1,6%	1,9% 0,7%	1,7% -

The Netherlands
Belgium

Source: MEDIA SALLES European Cinema Yearbook 2008

Appendix 2.2 Cinema figures

Cinema	1999	2000	2001	2002	2003	2004	2005	2006	2007
Number of cinemas	183	181	175	175	174	174	171	163	160
	135	135	123	126	128	122	122	109	-
Number of art cinemas	33	31	57	30	45	42	41	37	37
	17	14	11	-	16	16	16	15	-
Number of screens	520	562	565	593	603	623	625	629	630
	492	491	493	514	525	515	536	515	515
Number of seats	97.900	105.205	102.700	109.748	108.600	112.880	108.186	107.776	115.299
	114.878	111.717	109.059	114.272	116.980	115.239	118.522	113.885	-
Number of inhabitants per screen	30.308	28.228	28.296	27.159	26.853	26.096	26.089	25.969	25.965
	20.760	20.854	20.818	20.058	19.725	20.187	19.489	20.410	20.552
Density of screens in multiplexes	6,35%	12,46%	12,39%	16,86%	17,91%	20,06%	18,56%	20,03%	20,00%
	43,50%	43,99%	48,68%	50,19%	52,38%	53,20%	55,04%	59,03%	60,58%

Appendix 2.2.1 Density of screens

	1 screen %	2 screens %	3-5 screens %	6-7 screens %	≥8 screens %
Density of screens in cinemas 2007	-	-	-	18,25	20,00
	-	-	-	-	60,58
Density of screens in cinemas 2006	3,50	10,49	47,69	18,28	20,03
	7,96	4,66	16,50	11,84	59,03

Appendix 2.2.2 Digital projection

	1 st Jan 2004	1 st Jan 2005	1 st Jan 2006	1 st Jan 2007	1 st Jan 2008
Total number of digital cinemas	-	1	10	17	18
	8	10	14	16	16
Total number of digital screens	-	3	18	30	34
	10	14	20	35	76

The Netherlands
Belgium

Source: MEDIA SALLES European Cinema Yearbook 2008

Appendix 2.3 Market concentration in the Netherlands

Exhibition	Cinemas %	Screens %	Admissions %	Gross box-office %
Pathé/ Jogchem's-Punt/ Wolff Cinema Group in 2007	21,3	32,1	52,2	52,4
Pathé only in 2007	5,7	15,5	36,5	36,7
Jogchem's-Punt only in 2007	14,8	22,6	19,3	20,0
Pathé/ Jogchem's-Punt/ Wolff Cinema Group in 2006	22,1	33,1	52,7	54,4

Distribution:	Films distributed %	Gross box-office %
UIP/ Warner Bros/ Buena Vista International in 2007	-	53,3
Universal Pictures only in 2007	-	22,5
Warner Bros only in 2007	-	19,7
Walt Disney Studio Motion Pictures (Buena Vista) in 2007	-	11,2
UIP/ Warner Bros/ Buena Vista International in 2006	20,7	45,7

Source: MEDIA SALLES European Cinema Yearbook 2008, NVF & NVB Annual Report 2008

Appendix 2.4 Market concentration in Belgium

Exhibition	Cinemas %	Screens %	Admissions %	Gross box-office %
Kinepolis / UGC / Groupe Hanne in 2005	-	-	-	68,5
Kinepolis only in 2005	-	-	-	46,6

Distribution	Films distributed %	Gross box-office %
UIP/ 20 th Century Fox / Warner Bros in 2005	15,8	"almost 50%"

Source: BILTEREYST, D. & MEERS, PH., (ed.), 2007. De verlichte stad. Leuven: LannooCampus.

Appendix 2.5 Murphy's Law in the Netherlands in 2007

	Title	Distributor	Gross BO (€)	Admissions
1	Pirates O/T Caribbean:At World's End	WDS	10.111.301	1.225.799
2	Harry Potter A/T Order O/T Phoenix	WB	10.102.345	1.322.163
3	Alles Is Liefde	AFD	9.737.044	1.292.682
4	Shrek The Third	UPI	5.880.864	883.518
5	Mr. Bean's Holiday	UPI	4.902.368	686.134
6	Ratatouille	WDS	4.482.058	765.498
7	I Am Legend	WB	4.072.442	512.143
8	Ocean's 13	WB	3.276.132	438.044
9	Spider-Man 3	SPR	3.138.413	403.443
10	Bee Movie	UPI	2.951.968	451.360
11	Golden Compass, The	RCV	2.754.969	371.626
12	Bourne Ultimatum, The	UPI	2.710.840	431.559
13	Transformers	UPI	2.704.300	357.427
14	Die Hard 4.0	FOX	2.405.628	325.292
15	Blood Diamond	WB	2.388.055	314.555
16	Waar Is Het Paard Van Sinterklaas?	WB	2.214.617	352.258
17	Night At The Museum	FOX	2.179.578	309.018
18	Leben Der Anderen, Das	CM	2.071.856	310.189
19	Simpsons, The	FOX	1.991.186	340.557
20	300	WB	1.888.985	249.046
21	American Gangster	UPI	1.767.075	216.903
22	Music & Lyrics	WB	1.736.238	240.240
23	Enchanted	WDS	1.632.998	238.246
24	Zoop In Zuid-Amerika	IF	1.577.030	261.041
25	Norbit	UPI	1.547.814	213.257
26	Hairspray	RCV	1.526.701	278.846
27	Timboektoe	RCV	1.449.936	216.434
28	Ernst, Bobbie En De Geslepen Onix	IF	1.372.281	231.283
29	Atonement	UPI	1.363.893	197.407
30	Moordwijken	IF	1.281.781	165.218
31	Scheepjongens Van Bontekoe, De	RCV	1.269.689	186.081
32	I Now Pronounce You Chuck And Larry	UPI	1.241.831	182.858
33	Saw 3	IF	1.173.116	156.270
34	Pursuit Of Happyness	SPR	1.029.743	141.432
35	Heartbreak Kid, The	UPI	1.007.649	137.317
36	No Reservations	WB	1.002.972	182.408
37	Wild Hogs	WDS	984.410	135.973
38	Rush Hour 3	PAR	983.652	134.715
39	1408	BFD	971.649	168.532
40	Beowulf	WB	907.469	110.120
41	Beestenboel (NI)(Barnyard)	UPI	903.785	148.574
42	Apocalypto	AFD	873.411	117.897
43	Evan Almighty	UPI	853.258	130.668
44	Disturbia	UPI	811.736	145.353
45	Fracture	RCV	800.226	110.952
46	Kingdom, The	UPI	798.162	108.108
47	Knocked Up	UPI	784.191	111.838
48	Dreamgirls	UPI	777.105	120.362
49	Surf's Up: Een Oceanimatiefilm (NI)	SPR	775.638	120.527
50	Stardust	UPI	733.713	100.129
51	Plop En De Pinguin	IF	710.688	117.949
52	Haaibaai	IF	693.109	110.463
53	Earth	IF	674.282	94.753
54	Arthur En De Minimoy's (NI+Ov)	IF	627.233	102.389
55	Prestige, The	WB	613.157	85.202
56	Good Shepherd, The	BFD	610.984	80.008
57	Vie En Rose, La	RCV	605.254	88.816
58	Premonition	RCV	589.530	82.232
	Total top 20% (58 films)		121.028.339	17.113.112
	Gross total in 2007		159.679.000	23.059.000
	Total percentage		75,79 %	74,21 %

Source: NVF, Top 999 by GBO (2008)

DUTCH FILM DISTRIBUTORS ASSOCIATION, 2008. *Weekend Openings Top 50 – Netherlands*. (s.l.): NVF. Available at:<URL: <http://www.nfcstatistiek.nl/topop.pdf>> [Accessed 8 April 2009].

Appendix 2.6 Top 50 OWBO the Netherlands of all times

		OWBO x € 1.000	LTBO x € 1.000	Prints	Date	Sequel	Prequel	Familiar concept		Other
1	Pirates of the Caribbean 3	2.237	10.111	178	24-05-07	X		X	Franchise	
2	Harry Potter 1	1.999	15.354	248	22-11-01		X	X	Book, franchise	
3	Harry Potter 2	1.950	13.616	275	21-11-02	X		X	Book, franchise	
4	Harry Potter 4	1.948	10.999	252	24-11-05	X		X	Book, franchise	
5	Harry Potter 5	1.880	10.102	197	12-07-07	X		X	Book, franchise	
6	Harry Potter 3	1.853	8.301	307	03-06-04	X		X	Book, franchise	
7	Pirates of the Caribbean 2	1.766	10.525	132	13-07-06	X		X	Franchise	
8	Lord of the Rings 3	1.735	15.683	199	17-12-03	X		X	Book	
9	The Matrix Reloaded	1.653	6.595	145	15-05-03	X		X	Franchise	
10	The Da Vinci Code	1.650	8.089	143	18-05-06			X	Book, franchise	
11	Lord of the Rings 2	1.429	13.779	154	18-12-02	X		X	Book, franchise	
12	Shrek 2	1.311	6.017	224	01-07-04	X		X	Book, franchise	
13	The Matrix Revolutions	1.279	3.785	152	06-11-03	X		X	Franchise	
14	Die Another Day	1.259	6.804	112	09-01-03	X		X	Franchise	
15	Casino Royale	1.214	8.054	132	23-11-06	X		X	Book, franchise	
16	Spider-Man 1	1.175	4.207	128	04-07-02		X	X	Comic, franchise	
17	Jurassic Park	1.174	10.134	94	30-09-93		X		Book, franchise	
18	Pirates of the Caribbean 1	1.140	6.567	110	14-08-03		X			
19	Ice Age: the Meltdown	1.118	6.170	189	30-03-06	X		X	Franchise	
20	Shrek the Third	1.112	5.880	216	12-06-07	X		X	Book , Franchise	
21	Independence Day	1.107	6.895	100	03-10-96					
22	Hannibal	1.098	5.180	95	22-02-01	X		X	Book	
23	Star Wars – Episode III	1.095	3.908	115	19-05-05	X		X	Franchise	
24	Mission: Impossible 2	1.055	4.965	108	08-07-00	X		X	Franchise	
25	Day After Tomorrow	1.041	4.476	116	27-05-04				Creators	Director
26	Ocean's Twelve	1.024	5.184	135	16-12-04	X		X	Franchise	
27	Star Wars – Episode I	1.022	5.928	110	30-09-99	X		X	Franchise	
28	I Am Legend	1.013	4.072	96	20-12-07			X	Book	
29	Indiana Jones 4	1.011	4.374	132	22-05-08	X		X	Franchise	
30	Star Wars – Episode II	1.009	4.200	114	16-05-02	X		X	Franchise	
31	Titanic	1.006	23.567	106	29-01-98			X	True story	
32	War of the Worlds	1.005	4.286	113	30-06-05				Book, concept	
33	Lord of the Rings 1	1.002	13.951	121	20-12-01			X	Book	
34	Troy	989	5.345	136	13-05-04			X	Legend	
35	Bruce Almighty	958	5.563	102	26-06-03		X			
36	Flodder in Amerika	936	8.305	93	03-07-92	X		X	Franchise	
37	The Sixth Sense	907	7.615	90	13-01-00					
38	The Lost World	903	4.586	99	25-09-97	X		X	Book	
39	Finding Nemo	892	12.181	193	27-11-03				Creators	Pixar
40	Hancock	886	3.182	89	10-07-08					
41	The Lion King	882	13.350	142	24-11-94				Creators	Disney
42	Mr.Bean's Holiday	871	4.908	104	29-03-07	X		X	Franchise	
43	Bridget Jones 2	866	5.082	110	11-11-04	X		X	Book	
44	What Women Want	855	4.307	106	08-02-01					
45	Twister	847	5.935	95	22-08-96					
46	Goldeneye	843	6.852	92	07-12-95	X		X	Franchise	
47	The Dark Knight	863	-	90	24-07-08	X		X	Comic, Franchise	
48	The Village	834	2.246	100	26-08-04				Creators	Director
49	Unbreakable	831	3.402	95	11-01-01				Creators	Director
50	Signs	818	3.440	102	05-09-02				Creators	Director

Source:

DUTCH FILM DISTRIBUTORS ASSOCIATION, 2008. *Weekend Openings Top 50 – Netherlands*. (s.l.): NVF. Available at:
<URL:http://www.nfcstatistiek.nl/topop.pdf> [Accessed May 2009].

Appendix 2.7 Consumer behaviour of cinemagoers in the Netherlands in 2006/2007

Sex	x 1 000	%
Men	11268	45
Women	13665	55

Age	x 1 000	%
0 to 15 years	5225	21
15 to 25 years	7785	31
25 to 45 years	6564	26
45 to 65 years	4373	18
65 years and up	985	4

Source: CBS Statline: dagtochten naar kenmerken.

Frequency over age	2006 %	2007 %
4 to 11 years	2,15	2,16
12 to 17 years	2,49	3,29
18 to 23 years	3,33	3,95
24 to 29 years	2,02	3,25
30 to 39 years	2,41	1,68
40 to 54 year	1,25	1,63
55 to 65 years	0,68	0,88
65 years and up	0,82	0,75

Companionship	x 1 000	%
Alone	713	3
With housemates	8404	34
With housemates and others	3496	14
With others	12319	49

Companionship composition	2006 %	2007 %
Friends	43	41
Housemates or family members	43	39
Partner	25	21
Date	1	1

Alternative activity for cinema visit	2006 %	2007 %
Staying home, nothing special	36	30
Visiting different film	7	10
Playing outside, playground	-	8
Going to the café	5	6
Renting a DVD, VHS	3	4
Dining out	3	2
Gaming	-	2
Shopping	-	2
Other	13	28
Don't know, no response	6	9

Source: NVB and NVF Bioscoopmonitor 2006, 2007

Appendix 2.8 Decision making for a film in the Netherlands in 2006/2007 (top 20 films only)

Decision made for specific film	2006 %	2007 %
Prior to visit	90	90
At the cinema	9	9

Decision made by who	2006 %	2007 %
Myself	45	46
Friend(s)	18	21
Partner	11	11
Parent(s)	10	9
Other family member(s)/ housemate(s)	-	9
Child(ren)	10	8

Reason of choice	2006 %	2007 %
Story	49	54
Advertisements	38	37
Recommendation	33	35
Actors	24	34
Trailer in cinema	29	33
Prequel	27	30
Reviews	28	28
Special effects	16	17
Book	11	9
Director	7	6

Genre relation in 2007	Reason of choice
Action	Actors, special effects, prequel, trailer, reviews
Animation	Prequel, advertisements
Adventure	Actors, special effects, story, book, prequel, reviews
Drama	Actors, story, book, reviews
Family	Special effects, story, book, prequel, advertisements
Fantasy	Special effects, story, book, prequel
Horror	Director, prequel
Kids	Actors, prequel
Comedy	Actors, prequel, advertisements
Crime	Actors, prequel

Source: NVB and NVF Bioscoopmonitor 2006, 2007

Appendix 2.9 Cognition of a film in the Netherlands in 2006/2007 (top 20 films only)

Information source exhibitions	2007 %
Website local cinema	35
Internet	26
Newspaper, magazine	19
Leisure agenda, flyer, brochure	3
Phoning local cinema	3
Other	15

Cognition information sources	2006 %	2007 %
TV	68	67
POS-materials	45	46
Newspapers	45	41
Trailer in cinema	39	40
Internet	33	38
Magazine (minus film magazines)	31	26
OOH-advertisements	24	26
Film magazines	20	20
Leisure agenda, flyer, brochure	16	17
Radio	13	10
None of the above	5	4

Genre relation in 2007	Cognition information sources
Action	TV, radio, newspapers, film magazines, internet, trailer, OOH-advertisements, POS-materials
Animation	TV
Adventure	TV, radio, newspapers, film magazines, internet, trailer, OOH-advertisements, POS-materials
Drama	Newspapers, leisure agenda
Family	TV
Fantasy	TV, internet, OOH-advertising, POS-materials
Kids	TV
Comedy	TV, radio
Crime	Film magazines

Source: NVB and NVF Bioscoopmonitor 2006, 2007

Appendix 2.10 Decision making for theatrical consumption in the Netherlands in 2006/2007

Most important factors film visit in 2006	Positive %
Sociably / going out	42
Optimal film experience	42
Entertaining / good film	18
Taking a break from everyday life	11
Newest films	9
Enjoying going to the cinema	8
Relaxation	7
Good atmosphere	7
Comfortable seats	6
Spacious seating	4
Popcorn	4
Beverages / other consumptions	3

Most important factors film visit in 2006	Negative %
Nuisance from other visitors	20
Expensive tickets	15
Expensive food / beverages	12
Long lines at the counter	4
Too loud sound	4
Far distance to cinema	4
Bad hygiene at the cinema	4
Cramped seating	3
Uncomfortable seats	3
No negative factors	25
Don't know/ no response	7

Source: NVB and NVF Bioscoopmonitor 2006

Appendix 2.11 Characteristics of cinemagoers in the Netherlands in 2006/2007

Profiling	Not a cinemagoer		Less frequent cinemagoer		Frequent cinemagoer (≥3 times)	
	2006	2007	2006	2007	2006	2007
Age category	≥ 40 years	≥ 40 years	30 – 39 years	< 55 years		12 – 29 years
Residence region	Northern	Northern	Sub-urban	Urban	Urban	Urban
Household	1 – 2 persons	1 - 2 persons	2, 4 persons	≥ 3 persons	1, 2, 4 persons	≥ 3 persons
Social class	Lower	Lower	Mid to higher	Mid to higher	Mid to higher	Mid to higher
Education	Lower	Lower	Mid to higher	Higher	Higher	Higher

Source: NVB and NVF Bioscoopmonitor 2006, 2007

Appendix 2.12 Genre preference in Belgium

	Youth % Good to very good	Parents % Good to very good
Comedy	86,8	74,8
Thrillers	83,2	52,9
Adventure and action	80,1	68,7
Horror	73,3	19,3
Romance	71,0	78,0
Psychology and message	69,8	67,4
Crime and police	69,4	57,7
Cartoon	57,4	57,5
Science fiction	55,5	28,8
War	55,7	45,6
Violent	52,4	20,7
Social issues	51,3	69,7
Erotic	42,6	30,7
Cult	37,6	34,2
Political	19,3	29,5

Source:

SIONGERS, J. & STEVENS, F., 2002. Esthetica voor gevorderden: Over smaken en mediavorkeuren. in: Elchardus, Mark & Ignace Glorieux (red.), 2002. *De symbolische samenleving: Een exploratie van de nieuwe sociale en culturele ruimtes*. Tiel: Lannoo, chapter 3.

Appendix 2.13 Dutch television consumption per week in 2007

Sex	≥ 20 hours %	10 - 20 hours %	5 - 10 hours %	1 - 5 hours %	< 1 hours %
Men	28	36	21	11	3
Women	30	37	19	11	3

Age	≥ 20 hours %	10 - 20 hours %	5 - 10 hours %	1 - 5 hours %	< 1 hours %
12 to 18 years	22	41	21	13	2
18 to 25 years	22	35	26	14	3
25 to 45 years	25	40	21	12	2
45 to 65 years	34	39	17	8	2
65 years and up	57	27	11	4	1

Education	≥ 20 hours %	10 - 20 hours %	5 - 10 hours %	1 - 5 hours %	< 1 hours %
Lower	48	29	13	8	2
Lower secondary, lower vocational	44	32	15	8	1
Secondary	32	38	19	9	1
Higher secondary, vocational	29	39	19	10	2
Higher professional, university	15	44	26	12	2

Urbanisation	≥ 20 hours %	10 - 20 hours %	5 - 10 hours %	1 - 5 hours %	< 1 hours %
Extremely urban	31	35	20	11	3
Strongly urban	30	38	19	11	2
Moderately urban	28	38	21	11	3
Lesser urban	29	36	20	12	4
Not urban at all	28	37	21	10	4

Source: CBS Statline Media en ICT; gebruik televisie, krant, pc en internet.

Appendix 2.14 Belgian television consumption per week* in 2004

Average by sex	
Men	14:16
Women	12:40

Average by age	Men	Women
12 to 18 years	-	-
18 to 25 years	9:10	10:47
25 to 45 years	10:32	10:04
45 to 55 years	14:06	10:54
55 to 65 years	18:22	14:53
65 to 75 years	23:42	20:56

Average by education	Men	Women
Low	18:25	15:57
Medium	12:37	11:42
High	9:45	8:30

Average by urbanisation	Men	Women
Extremely urban	14:20	11:38
Moderately urban	14:27	13:46
Not urban at all	14:06	12:18

* In hours:minutes

Source: Database Tijdsbestedingsonderzoek
ONDERZOEKSGROEP TOR, tijdbestedinggegevens TOR'04. (www.tijdszonderzoek.be), Brussel: Vrije Universiteit.

Appendix 2.15 Frequency of news consumption per media in 2005

	Television %			Radio %			Newspapers %		
	Daily	Weekly	Fewer	Daily	Weekly	Fewer	Daily	Weekly	Fewer
Netherlands	74	21	5	54	21	25	61	23	16
Belgium	62	31	7	52	22	26	32	29	39
- Francophone	66	26	8	47	22	32	27	30	43
- Flemish	59	35	6	56	22	22	36	27	36

EUROBAROMETER, 2006. Europese vergelijking van het mediagebruik: frequentie van nieuwsgaring via de traditionele media 2005.
Available at: <URL:<http://www4.vlaanderen.be/dar/svr/cijfers/Exceltabellen/media/algemeen/Medium%20nieuwsgaring/MEDIALGE016.xls>> [Accessed May 2009]

Appendix 2.16 Dutch news consumption per media in 2007

Minutes per day	< 35 years %	35 – 54 years %	> 55 years %	Total %
TV	31,9	41,4	68,9	46,7
Radio	12,5	12,7	20,0	15,3
Newspapers (e-papers)	11,7	16,8	35,5	20,9
Magazines	0,5	0,9	3,4	1,5
Internet / RSS-feeds	8,9	6,6	5,2	6,9
Teletext	4,6	8,5	6,9	6,7

Source: COMMISSARIAAT VOOR DE MEDIA, 2008. Mediaconcentratie in beeld: Concentratie en pluriformiteit van de Nederlandse media 2007. Hilversum: Commissariaat voor de media.

Appendix 2.17 Dutch newspaper consumption in 2007

Appendix 2.17.1 Daily consumption

Sex	%
Men	62
Women	57

Appendix 2.17.2 Subscription

Sex	%
Men	50
Women	50

Age	%
12 to 18 years	51
18 to 25 years	45
25 to 45 years	34
45 to 65 years	61
65 years or older	71

Education	%
Primary	44
Lower secondary, lower vocational	51
Secondary	52
Higher secondary, vocational	49
Higher professional, university	63

Urbanisation	%
Extremely urban	40
Strongly urban	45
Moderately urban	53
Lesser urban	55
Not urban at all	62

Source: CBS Statline Media en ICT (2009), *gebruik televisie, krant, pc en internet*.

Appendix 2.18 Dutch internet participation in 2006 and 2007

Appendix 2.18.1 Users in population*

Sex	2006 %	2007 %
Men	86	88
Women	79	82
Age	2006 %	2007 %
12 to 25 years	99	99
25 to 45 years	92	95
45 to 65 years	73	80
65 to 75 years	40	43
Education	2006 %	2007 %
Low	69	73
Medium	87	91
High	96	97

* Over the past three months

Source: CBS Statline

Appendix 2.18.2 Daily users**

Sex	2006 %	2007 %
Men	80	82
Women	70	75
Age	2006 %	2007 %
12 to 25 years	79	86
25 to 45 years	76	80
45 to 65 years	73	75
65 to 75 years	56	61
Education	2006 %	2007 %
Low	68	75
Medium	73	76
High	86	87

** From users only

Appendix 2.19 Belgian internet participation in 2006

Appendix 2.19.1 Users in population*

Sex	Belgium	Brussels	Flanders	Wallonia
Men	66	79	70	58
Women	58	66	61	50

Age	Belgium	Brussels	Flanders	Wallonia
16 to 24 years	86	96	93	73
25 to 34 years	79	82	83	70
35 to 44 years	73	70	78	64
45 to 54 years	64	69	68	54
55 to 64 years	40	44	41	37
65 to 74 years	14	21	15	10

Education	Belgium	Brussels	Flanders	Wallonia
High	86	86	90	79
Medium	68	73	72	59
Low	40	48	41	37

Age and sex	Belgium	Brussels	Flanders	Wallonia
Men / 16 to 24	86	94	93	71
Men / 25 to 54	74	75	79	66
Men / 55 to 74	36	42	38	32
Women / 16 to 24	87	97	92	75
Women / 25 to 54	69	74	73	59
Women / 55 to 74	21	28	22	19

Education and sex	Belgium	Brussels	Flanders	Wallonia
High / men	89	90	91	84
High / women	84	82	89	74
Medium / men	71	72	76	61
Medium / women	65	73	68	56
Low / men	46	50	49	41
Low / women	34	45	34	33

* Over the past three months, in %

Source: StatBel, DIGITALE KLOOF IN BELGIË 2006.

Available at: <URL:http://statbel.fgov.be/downloads/ict_hh_2006detail_nl.xls> [accessed May 2009]

Appendix 2.19.2 Daily users**

Sex	Belgium	Brussels	Flanders	Wallonia
Men	74	76	75	72
Women	69	67	70	69

Age	Belgium	Brussels	Flanders	Wallonia
16 to 24 years	77	70	80	73
25 to 34 years	72	71	73	68
35 to 44 years	72	75	70	73
45 to 54 years	71	76	72	69
55 to 64 years	68	69	65	73
65 to 74 years	61	58	61	60

Education	Belgium	Brussels	Flanders	Wallonia
High	81	83	82	78
Medium	68	62	68	69
Low	65	63	66	65

Age and sex	Belgium	Brussels	Flanders	Wallonia
Men / 16 to 24	78	77	78	76
Men / 25 to 54	74	77	75	72
Men / 55 to 74	70	72	70	70
Women / 16 to 24	77	65	82	70
Women / 25 to 54	69	70	69	68
Women / 55 to 74	60	59	54	72

Education and sex	Belgium	Brussels	Flanders	Wallonia
High / men	86	87	88	81
High / women	76	79	76	74
Medium / men	69	70	68	72
Medium / women	66	56	67	65
Low / men	66	64	68	63
Low / women	65	63	64	67

** From users only, in %

Source: StatBel, DIGITALE KLOOF IN BELGIË 2006.

Available at: <URL:http://statbel.fgov.be/downloads/ict_hh_2006detail_nl.xls> [accessed May 2009]

Appendix 2.20 Attentiveness scores for each medium

	Hard avoidance %	Inattentive %	Engagement %
Radio	18	64	18
Cinema	18	49	33
TV	31	48	22
Magazines	34	47	19
Newspapers	37	48	15
Average	28	51	21

Source: RADIO ADVERTISING BUREAU, 200-. Ad avoidance report. (s.l.): Radio Advertising Bureau.

Appendix 3.1 Background information interviewees

Appendix 3.1.1 Diane Borst

Diane Borst is publicity manager at BFD Netherlands since February 1st 2009. Prior to this function she has spend 6 months at a PR Agency after she had left the Dutch office of major distributor Warner Bros Here she has achieved almost 9 years of experience in free publicity in film.

Appendix 3.1.2 Cynthia Ophorst

Cynthia Ophorst is marketing director at BFD Netherlands since the beginning of 2009, after being marketing manager at BFD for more than three years. Prior to her career at BFD she has spend 6.5 years at A-film and she many years of experience at production companies, Polygram and RCV. During these years she has dealt with functions in publicity and marketing.

Appendix 3.1.3 ValérieDepreeuw

ValérieDepreeuw is marketing manager at BFD Belgium since its establishment in 2005. At that moment she was responsible for press relations at KFD for three years. Before she started in the film industry, Valérie had several years of experience in the music industry in marketing and publicity.

Appendix 3.1.4 Veerle Creve

Veerle Creve has started at BFD Belgium through Lumière five years ago, first in marketing and promotions. When the companies expanded, Veerle concentrated in publicity, now being in this position for three years. Previously she workedat Flanders Image forfour years, now merged into the VlaamsAudiovisueelFonds,next to her studies and after graduation.

Appendix 3.2 *Methods: Interview questions*

Appendix 3.2.1 *Diane Borst*

- How do you see the Dutch theatrical film exhibition market? Is there a good balance between offer and demand? Do you believe the market is saturated?
- How crucial is promotional communication for a film? Would a film get visitors by only push strategies? How important is PR for a film?
- Do you believe the promotional communication perhaps influence the attitude of exhibitors?
- How effective is PR? Do you notice a difference in a variety of films or strategies? Do PR efforts have a direct effect on the box-office revenues?
- Do you believe there is a difference between the amount and usage of PR in the film industry or in general in the Netherlands in comparison to other regions?
- Is the right amount invested in advertising or media buying?
- Do you believe it is becoming harder to reach the audience and get noticed? Or is promotional communication becoming more effective? Please give your vision.
- Is there any pressure on the Dutch executives to search for innovative communication to gain effectiveness?
- Could PR perhaps become increasingly important due to the advertising climate or simply as a low-cost alternative?
- Do you believe the attitude of the audience towards film advertising has an effect on the effectiveness on PR? Is there a difference between the attitude of art-house and mainstream audiences towards advertising or PR?
- Would an intensive increase in advertising have a positive effect on the BO of films that are presumably art-house? Or is there a clear distinction in favoured strategies by the audience?

- Do you believe the distinction between art-house and mainstream will be the same? If not, in what way will the connection change? Will separation increase or decrease?
- Do you believe the audience makes a choice for a specific movie? Which differences do you notice in different segments of the audience?
- Cinema going is often done in groups; do you believe this affects involvement? Do you bear this in mind when you targeting an audience?
- Could you describe the most important cinema goers? Frequency, sex, income, etc.
- Do you apply targeting specific media onto the audience features? Could you describe how? Is the audience more selective in media usage today?
- Could you describe how the focus on OWBO and blockbusters affects your work as a PR executive?
- Do you perhaps invest more in PR prior to the OW to increase effect at the BO? Does PR have a different effect after the OW?
- What do you believe is most effective: media buying, free publicity or worth-of-mouth? Do believe in different levels of credibility? Does the amount influence of either three shift to another during a film's run?
- Does negative WOM or buzz directly have an effect on the BO?
- Can you create WOM prior to a release? Is WOM manageable?
- Do you notice a difference in WOM in relation to networking sites? Do you think networking sites will be replacing WOM? Is internet a suitable medium for PR or buzz/WOM?
- Does WOM cross borders? If so, does delaying a release have an effect on the buzz and therefore success of a foreign film?

- What is the main source for reviews? (newspapers) Why are newspapers so important to films in the Netherlands?
- Do you notice a difference between art-house and mainstream in the way the printed press gives attention to a film? Does either of them receive more exposure? Do critics have a more positive attitude towards one or the other? Does that depend on the type of newspaper?
- Does success attract more attention from the reporting media? Do journalists perhaps change their minds when a film is thought to be successful? Do you believe in a snowballing effect for successful films with the media enhancing the box office and the box office enhancing the media?
- In case of seasonality, is it harder to promote a film in a popular season because there is more offer or do media also provide more exposure?
- Do you notice an effect of a negative or positive review on the box-office?
- Do critics judge a film differently from the audience?
- What do you prefer? A good review in the middle of a newspaper or a moderate review at the front page? Do you notice a difference for different type of films or audiences?
- What sort of effect, if any, has the 'Kijkwijzer' on the box-office?
- What sort of effect, if any, do Awards have on the box-office?
- What sort of effect, if any, do celebrities have on the box-office?
- What sort of effect, if any, does a large production budget have on the box-office?
- Do you treat big budget films differently based on budget solely?
- How do junkets, festivals and premieres serve in terms of PR?
- Do you believe that a strong corporate identity of distributors such as Disney could improve the relation with a certain audience?

Appendix 3.2.2 Cynthia Ophorst

- How do you see the Dutch theatrical film exhibition market? Is there a good balance between offer and demand? Do you believe the market is saturated?
- Is there an increase on the focus on the OW? If so, is there an increase in the distributors focus on blockbusters such as is the case in the US?
- Are successful sleepers or platform releases manageable according to you? Is there a trend?
- Figures show there has been a growth in the revenues of the film market since 1992. What do you believe is the reason?
- In the US only 30-40% of the films in theatrical release break even and only 10% receive profits. Are these figures similar in the Dutch market?
- How crucial is promotional communication for a film? Would a film get visitors by only push strategies? How important is a marketing campaign for a film?
- Do you believe the promotional communication perhaps influence the attitude of exhibitors?
- How effective is advertising? Do you notice a difference in a variety of films or strategies? Do advertising efforts have a direct effect on the box-office revenues?
- Is the right amount invested in advertising or media buying? Is there an increase over the past years? In the US 27% of the BO revenue is spend on advertising, is the figure similar in the Netherlands? Has advertising become more expensive over the past years?
- Do you believe it is becoming harder to reach the audience and get noticed? Or is promotional communication becoming more effective? Please give your vision.

- Is there any pressure on the Dutch executives to search for innovative communication to gain effectiveness?
- What is the attitude of the audience towards film advertising in the Netherlands? Is there a difference between the attitude of art-house and mainstream audiences towards advertising or PR?
- Could PR perhaps become increasingly important due to the advertising climate or simply as a low-cost alternative?
- Would an intensive increase in advertising have a positive effect on the BO of films that are presumably art-house? Or is there a clear distinction in favoured strategies by the audience?
- Do you believe the distinction between art-house and mainstream will be the same? If not, in what way will the connection change? Will separation increase or decrease?
- Do you believe the audience makes a choice for a specific film? Which differences do you notice in different segments of the audience?
- Cinema going is often done in groups; do you believe this affects involvement? Do you bear this in mind when you targeting an audience?
- Could you describe the most important cinema goers? Frequency, sex, income, etc.
- Do you apply targeting specific media onto the audience features? Could you describe how? Is the audience more selective in media usage today?
- Do you perhaps invest more in marketing efforts prior to the OW to increase effect at the BO? Do marketing efforts have a different effect after the OW?
- What do you believe is most effective: media buying, free publicity or word-of-mouth? Do believe in different levels of credibility? Does

the amount influence of either three shift to another during a film's run?

- Do you believe a specific medium is most effective? (trailers, printed press, internet, etc?)
- Do you believe advertising has an effect later in a film's run?
- Does negative WOM or buzz directly have an effect on the BO?
- Can you create WOM prior to a release? Is WOM manageable?
- Do you notice a difference in WOM in relation to networking sites? Do you think networking sites will be replacing WOM? Is internet a suitable medium for promotion or buzz/WOM?
- Does WOM cross borders? If so, does delaying a release have an effect on the buzz and therefore success of a foreign film?
- Does delaying the release of a foreign film decrease the creditability of its quality?
- Are BO results in the US related to BO results here in such a way to make a prediction? And does Belgium stand in this relation?
- Do you notice a difference between art-house and mainstream in the way the printed press gives attention to a film? Does either of them receive more exposure? Do critics have a more positive attitude towards one or the other? Does that depend on the type of newspaper?
- Does BO success attract more visitors? Do you believe in a snowballing effect for successful films with the media enhancing the box office and the box office enhancing the media?
- In case of seasonality, is it harder to promote a film in a popular season because there is more offer or do media also provide more exposure?
- Do you notice an effect of a negative or positive review on the box-office?
- Do critics judge a film differently from the audience?

- What do you prefer? A good review in the middle of a newspaper or a moderate review at the front page? Do you notice a difference for different type of films or audiences?
- What sort of effect, if any, have certain genres on the box-office?
- What sort of effect, if any, has the 'Kijkwijzer' on the box-office?
- What sort of effect, if any, do Awards have on the box-office?
- What sort of effect, if any, do celebrities have on the box-office?
- What sort of effect, if any, does a large production budget have on the box-office?
- Do you treat big budget films differently based on budget solely?
- Do you concur with the widespread opinion that there is a trend towards sequels and films based on a familiar concept (such as books, comics, theatre plays or true events)
- How do sequels generally perform at the BO in relation to their parents and 'other' films? How effective is advertising for these films?
- A large complain from the Dutch film industry is that many Dutch cinemas are behind on innovation or have outdated interiors, bad hygiene. How much does this affect the revenues?
- Do you think the investment in digital projectors at cinemas attracts more revenues?
- Do you believe that a strong corporate identity of distributors such as Disney could improve the relation with a certain audience?

Appendix 3.2.3 Valérie Depreeuw

- How do you see the theatrical film exhibition market in Belgium? Is there a good balance between offer and demand? Do you believe the market is saturated?
- Is there an increase on the focus on the OW? If so, is there an increase in the distributors focus on blockbusters such as is the case in the US?
- Are successful sleepers or platform releases manageable according to you? Is there a trend?
- Figures show there has been a growth in the revenues of the Dutch film market since 1992. How is this in Belgium?
- In the US only 30-40% of the films in theatrical release break even and only 10% receive profits. Are these figures similar in the Belgian market?
- How crucial is promotional communication for a film? Would a film get visitors by only push strategies? How important is a marketing campaign for a film?
- Do you believe the promotional communication perhaps influence the attitude of exhibitors?
- How effective is advertising? Do you notice a difference in a variety of films or strategies? Do advertising efforts have a direct effect on the box-office revenues?
- Is the right amount invested in advertising or media buying? Is there an increase over the past years? In the US 27% of the BO revenue is spend on advertising, is the figure similar in the Netherlands? Has advertising become more expensive over the past years?
- Do you believe it is becoming harder to reach the audience and get noticed? Or is promotional communication becoming more effective? Please give your vision.

- Is there any pressure on the Belgian executives to search for innovative communication to gain effectiveness?
- What is the attitude of the audience towards film advertising in Belgium and particularly Flanders? Is there a difference between the attitude of art-house and mainstream audiences towards advertising or PR?
- Could PR perhaps become increasingly important due to the advertising climate or simply as a low-cost alternative?
- Would an intensive increase in advertising have a positive effect on the BO of films that are presumably art-house? Or is there a clear distinction in favoured strategies by the audience?
- Do you believe the distinction between art-house and mainstream will be the same? If not, in what way will the connection change? Will separation increase or decrease?
- Do you believe the audience makes a choice for a specific film? Which differences do you notice in different segments of the audience?
- Cinema going is often done in groups; do you believe this affects involvement? Do you bear this in mind when you targeting an audience?
- Could you describe the most important cinema goers? Frequency, sex, income, etc.
- Do you apply targeting specific media onto the audience features? Could you describe how? Is the audience more selective in media usage today?
- Do you perhaps invest more in marketing efforts prior to the OW to increase effect at the BO? Do marketing efforts have a different effect after the OW?
- What do you believe is most effective: media buying, free publicity or word-of-mouth? Do you believe in different levels of credibility? Does

the amount influence of either three shift to another during a film's run?

- Do you believe a specific medium is most effective? (trailers, printed press, internet, etc?)
- Do you believe advertising has an effect later in a film's run?
- Does negative WOM or buzz directly have an effect on the BO?
- Can you create WOM prior to a release? Is WOM manageable?
- Do you notice a difference in WOM in relation to networking sites? Do you think networking sites will be replacing WOM? Is internet a suitable medium for promotion or buzz/WOM?
- Does WOM cross borders? If so, does delaying a release have an effect on the buzz and therefore success of a foreign film?
- Does delaying the release of a foreign film decrease the creditability of its quality?
- Are BO results in the US related to BO results here in such a way to make a prediction? And does the Netherlands have a stand in this relation?
- Do you notice a difference between art-house and mainstream in the way the printed press gives attention to a film? Does either of them receive more exposure? Do critics have a more positive attitude towards one or the other? Does that depend on the type of newspaper?
- Does BO success attract more visitors? Do you believe in a snowballing effect for successful films with the media enhancing the box office and the box office enhancing the media?
- In case of seasonality, is it harder to promote a film in a popular season because there is more offer or do media also provide more exposure?
- Do you notice an effect of a negative or positive review on the box-office?

- Do critics judge a film differently from the audience?
- What do you prefer? A good review in the middle of a newspaper or a moderate review at the front page? Do you notice a difference for different type of films or audiences?
- What sort of effect, if any, have certain genres on the box-office?
- What sort of effect, if any, has the Belgian rating system on the box-office?
- What sort of effect, if any, do Awards have on the box-office?
- What sort of effect, if any, do celebrities have on the box-office?
- What sort of effect, if any, does a large production budget have on the box-office?
- Do you treat big budget films differently based on budget solely?
- Do you concur with the widespread opinion that there is a trend towards sequels and films based on a familiar concept (such as books, comics, theatre plays or true events)
- How do sequels generally perform at the BO in relation to their parents and 'other' films? How effective is advertising for these films?
- A large complain from the Dutch film industry is that many Dutch cinemas are behind on innovation or have outdated interiors, bad hygiene. How much does this apply to Belgium?
- Do you think the investment in digital projectors at cinemas attracts more revenues?
- Do you believe that a strong corporate identity of distributors such as Disney could improve the relation with a certain audience?

Appendix 3.2.4 *Veerle Creve*

- How do you see the Belgian theatrical film exhibition market? Is there a good balance between offer and demand? Do you believe the market is saturated?
- How crucial is promotional communication for a film? Would a film get visitors by only push strategies? How important is PR for a film?
- Do you believe the promotional communication perhaps influence the attitude of exhibitors?
- How effective is PR? Do you notice a difference in a variety of films or strategies? Do PR efforts have a direct effect on the box-office revenues?
- Is the right amount invested in advertising or media buying?
- Do you believe it is becoming harder to reach the audience and get noticed? Or is promotional communication becoming more effective? Please give your vision.
- Is there any pressure on the Belgian executives to search for innovative communication to gain effectiveness?
- Could PR perhaps become increasingly important due to the advertising climate or simply as a low-cost alternative?
- Do you believe the attitude of the audience towards film advertising has an effect on the effectiveness on PR? Is there a difference between the attitude of art-house and mainstream audiences towards advertising or PR?
- Would an intensive increase in advertising have a positive effect on the BO of films that are presumably art-house? Or is there a clear distinction in favoured strategies by the audience?
- Do you believe the distinction between art-house and mainstream will be the same? If not, in what way will the connection change? Will separation increase or decrease?

- Do you believe the audience makes a choice for a specific movie? Which differences do you notice in different segments of the audience?
- Cinema going is often done in groups; do you believe this affects involvement? Do you bear this in mind when you targeting an audience?
- Could you describe the most important cinema goers? Frequency, sex, income, etc.
- Do you apply targeting specific media onto the audience features? Could you describe how? Is the audience more selective in media usage today?
- Could you describe how the focus on OWBO and blockbusters affects your work as a PR executive?
- Do you perhaps invest more in PR prior to the OW to increase effect at the BO? Does PR have a different effect after the OW?
- What do you believe is most effective: media buying, free publicity or worth-of-mouth? Do believe in different levels of credibility? Does the amount influence of either three shift to another during a film's run?
- Does negative WOM or buzz directly have an effect on the BO?
- Can you create WOM prior to a release? Is WOM manageable?
- Do you notice a difference in WOM in relation to networking sites? Do you think networking sites will be replacing WOM? Is internet a suitable medium for PR or buzz/WOM?
- Does WOM cross borders? If so, does delaying a release have an effect on the buzz and therefore success of a foreign film?
- What is the main source for reviews?
- Do you notice a difference between art-house and mainstream in the way the printed press gives attention to a film? Does either of them receive more exposure? Do critics have a more positive

attitude towards one or the other? Does that depend on the type of newspaper?

- Does success attract more attention from the reporting media? Do journalists perhaps change their minds when a film is thought to be successful? Do you believe in a snowballing effect for successful films with the media enhancing the box office and the box office enhancing the media?
- In case of seasonality, is it harder to promote a film in a popular season because there is more offer or do media also provide more exposure?
- Do you notice an effect of a negative or positive review on the box-office?
- Do critics judge a film differently from the audience?
- What do you prefer? A good review in the middle of a newspaper or a moderate review at the front page? Do you notice a difference for different type of films or audiences?
- What sort of effect, if any, has the Belgian rating system on the box-office?
- What sort of effect, if any, do Awards have on the box-office?
- What sort of effect, if any, do celebrities have on the box-office?
- What sort of effect, if any, does a large production budget have on the box-office?
- Do you treat big budget films differently based on budget solely?
- How do junkets, festivals and premieres serve in terms of PR?
- Do you believe that a strong corporate identity of distributors such as Disney could improve the relation with a certain audience?

Appendix 3.3 Results: summary of interviews

3.3.1 Diane Borst

When addressing the saturation in the Netherlands, Diane Borst agrees that the market is suffocating and that there are too few screens available for the amount of films being released. Though, she says, this does not necessarily give power to exhibitors. Commerciality is the most important issue to them, but that is also the case for commercial distributors. The commercial and short-term vision has a smaller effect on PR, since PR is a peaking moment around the release anyway, also when the pressure was less.

On the other hand: journalists today have to choose which film will be reviewed and which review will be printed. She mentions this is especially the case for the printed press since the space is limited and the advertising income is dropping. Content that is interesting for the target audience and amount of space spend is much more important. This is less applicable to online media, where access through search engines delivers content easily and many different articles can be hosted. The increase of the amount of film releases during the popular seasons and holidays puts a bigger pressure on the printed press during these times. Diane has not noticed an increase of attention on film by the media other than the leisure suggestions in special holiday enclosures.

Since critics have to choose between film reviews today, Diane believes that it is best to have a good relation with certain critics. Nonetheless, critics still have a preference for films that attract a larger audience, but this also depends on the target audience of the newspaper itself. In general are large mainstream films the norm, Diane explains this is because large films large in society. Examples she makes are de Telegraaf with a large focus on large mainstream films and de

Volkskrant offering a platform for smaller art-house. She also mentions Dutch films are practically always treated. Critics cannot afford to skip large or Dutch films, since the audience would question the newspaper's choice. Diane thinks big blockbuster films will be covered; next a Dutch film disregarded its size; when there is space perhaps a mainstream or a smaller art-house production depending on the newspaper's audience.

Newspapers are so intensely important to film audiences since newspapers have such a wide reach and high circulation. On the other hand doe TV-weeklies have a clear segment of the public, making it easier to define a target audience. Critics do not criticize films differently in their reviews; mainstream and art-house are equally criticized based on quality. She does note a difference between TV-weeklies and newspapers. Newspaper critics are often specialists and have stronger criticism, whereas TV-weeklies are milder and try to approach the probable opinion of their target audience. Diane notes that this especially applies to women's weeklies.

Diane also believes that there is a clear difference in the use of newspapers between audiences. Art-house audiences are much more subject to reviews than younger mainstream audiences. She thinks this is mainly because the elder audiences are more interested in reading in general and also read more newspapers. For a very big mainstream film such as the Fast and the Furious, the audience does not find a good review significant for their decision making.

Still she believes that negative reviews can have a strong direct impact on the box-office for all type of films. Though, she admits it is hard to be sure in this case since free publicity or PR efforts are difficult to be measured. Only exposure can be compared, the actual impact of a message per medium is impossible. If Diane had to choose between an excellent review in the film section of a newspaper and a mediocre review on the front page

she refers to the different audiences. The visibility on the front page is of value to mainstream productions, whereas art-house audiences tend to actually read and value reviews. The art-house audience is more likely to open the film section because this audience has a specific interest in film. Diane does mention that certain positions are preferred such as right-below on a page.

Next to that, Diane mentions that PR never has an independent effect since many communication channels influence the audience. She neither believes that PR is a full substitute for advertising to reduce costs. The entire package consists of factors such as positioning by the sales department and a film running in most cinemas, the visibility of POS-materials, advertising exposure, reviews, a good poster, etc. The audience must be confronted with the film many times in many ways, through audio and visuals.

WOM is important in case of film as a promotional tool but negative WOM can also break a film. The most important success factor therefore is the quality of the film, which in turn will drive the communication to follow. Diane says it is really hard to turn a film of lesser quality into a success and PR will never be able to save a really bad film.

For a big film the buzz made by the distributor is very important, again a part of visibility. In case of very large openings (80-100 prints in the Netherlands) the audience must have heard and seen much about a film, it must be positioned wide and a great amount of buzz from the US is important. These hype dependent films are mainly mainstream productions from major distributors. The hype makes people motivated for a film visit. Buzz from the US is especially important for journalists; they are largely influenced by film magazines such as 'Variety', 'Empire', 'Hollywood Report', 'Screen International' and by the 'IMDb'.

Diane explains that journalists and critics write their articles weeks ahead of its printed publication including back ground information, with the amount of attention being predetermined. If there is a reason for buzz in the later run of a film, this must be intended by the distributor itself. Special attention of a film evolving from recent milestones such as a box-office milestone, always need to be initiated by a publicity executive through a press-release.

Diane believes that negative buzz from the US can also pass over but that buzz is still manageable to some extend. She says that in case of bad buzz it is sometimes better to delay a release and hope that the buzz will skip in the Netherlands. She mentions that during her years at one of the majors that this was not possible. Larger films are often released day-to-date, since the policy is governed from the headquarters in the US. Majors hope to achieve a volcano outburst of attention around a release's film. Independents buy films themselves and can position the film more freely, though in this case it is also best to stay close to the release date in the US in order to profit from the global buzz.

She also believes that buzz among people in the form of WOM can start without people actually having experiences the film, which is the case prior to the release. She thinks the influence of WOM is mainly dependent on lifestyle and hypes for younger audiences whereas older art-house audiences define their own opinions. She agrees that younger people are more connected through media though she mentions that there are many different subcultures and therefore target groups within the young mainstream audiences.

The use of network websites is becoming increasingly important for youth, though older generations are also widely present on Hyves in the Netherlands. Younger people are not only more familiar with the new media but also more influential and their lifestyle is more determent by

fashion. Next to that, do the elderly still read more newspapers and value these better. Diane calls network sites a positive development for segmenting, since you can target very specifically on Hyves through demographics and interests.

To what extent audiences adapt opinions of others varies per audience Group and some audience Group affect each other also, though this is very complex. Diane mentions the reflection of critics on this; one critic has more influence than the other because its target group might adapt more easily.

Diane agrees on the issue that people are more selective on media consumption, according to her simply because the audience has to divide its attention. She says it has always been hard to attract attention and influence audiences. The selection is not a specific feature of PR, according to Diane, also in advertising and promotions executives must increasingly invest in differentiation by being creative.

In order to target and influence certain audiences, the quality of a film and the presence of certain celebrities can be very helpful. Especially when an award is won, Diane says it is useful to rely on the reference of quality. These attributes can already give an indication of the audience and the probable success at the box-office in the first couple of weeks. The first couple of weeks are crucial for the final success of most films, but particularly for large mainstream productions.

Diane considers award won films different from mainstream films; the award nominees are closer to art-house or at least quality focused. She thinks none of the film festivals is really mainstream oriented, and the films are mostly not blockbusters until the actual awards are won. Award films compete in the mainstream cinemas because their nominations or awards enhance the cross-over to other segments in the public. Still these films

attract older audiences, according to Diane mostly 25 years old and up, and these consider awards most credible. She says some people really need the benefit of such awards and that especially best picture, best actor and best actress have the biggest impact, with these awards belonging to extreme transformation performances. The academy awards are therefore not only a good tool for the box-office but also an acknowledgement for the people that have contributed to the production, with an impact on their future projects.

Awards are specifically important to free publicity, not only the buzz from the United States is larger but the awards also create a new opportunity for press releases in the Netherlands itself. The title of the film is mentioned everywhere and naming the award as 'the Oscar winner Kate Winslet' creates extra value. Now the film competes in the mainstream cinemas but award films in general do not have an advertising budget that competes. The pressure on PR executives is therefore much higher when it comes to promotion of a small release. Diane does mention that these smaller productions are more suitable for free publicity. Diane is not aware of the effects of an intensive increase of advertising expenditures on art-house in relation to credibility and free publicity.

Younger audiences base their preferences on different factors and have lesser interest in awards or reviews. Younger people often decide in groups and go often to the cinema because of the experience. They search for companions and then consider the films offered. Especially the large cinemas such as those of Pathé are targeted at these groups. They offer big multiplexes in urban areas, large service desks with popcorn, continuous programming of the newest and biggest films in large auditoria with big commercial promotions. This is where the market segmentation already starts. Some particular films do attract younger generations as a loyal customer. The films have communication attributes such as a

celebrity starring or have a fashionable aspect to them. The younger generations are more sensitive to hypes and peer pressure, and the weekends are particularly popular among the younger target groups. This also causes a run on the opening weekend box-office according to Diane, after the first few weeks the youth has less interest in a film or has already seen it. Public relations activities in this group are less influential but the overall visibility and image is.

Diane notes there is a large audience of visitors that go by one self or decide to visit a cinema because of a film, often are these from older generations. The 'older' generations, people in their twenties and upwards, choose to go to the large cinemas during weekdays to avoid the commotion of the young crowd. The older generations are also more present at the consumption of film in the art-house cinemas. Diane says this same audience is going to a certain film whenever they have the time, sometimes weeks after its release. Free publicity is not so much driven by to OWBO peak and a volcano outburst of attention.

While discussing consumer loyalty and the brand of a distributor such as is the case of Disney, Diane believes the name of a film itself is mentioned most. According to her, even in case of Disney, people do not refer to a distributor. She does imply that expectations can be higher with brand such as Disney or Pixar but she believes that the brand recognition comes from the person Walt Disney, the famous short cartoons and the merchandising. She notes that today the images of distributors are not relevant to the audience. On the other hand could a clear identity and image help with building a relationship with a critic. Intensifying a relationship with the audience would be harder, even the target audience of Disney has many segments and is changing overtime. But Diane does believe you could make a quality brand, especially towards certain

cinemas. The origin of a film is now mainly pointed out by referring to directors and producers, for example with denoting “by the creator of”.

The rating system in the Netherlands (Kijkwijzer) is subordinate to film critics. The issue is only discussed when there is a clear doubt or criticism on the rating, for example with Harry Potter between the 6+ and 12+ classifications. This publicity could work out both positively and negatively according to Diane. But today this is not as much the case since the rating system has introduced a new standard of 9+. The 12+ rating excludes a large segment of the public, which can be disastrous to the family genre. On the other hand, Diane brings up the production *Oorlogswinter*, a family film with a 12+ rating being extremely popular, but the film must be attractive for a very wide range of audience. The rating system itself as a message does not put off audiences other than the exclusion of younger age groups. Of course this excludes extreme situations; family films with a warning for sex or horror films with a ‘suitable for all ages’ rating affects the perceived image of a film. A rating does limit the possibilities for promotion, according to Diane. In some cases advertising is prohibited at daytime.

Appendix 3.3.2 Cynthia Ophorst

When the interview starts off with a discussion on the saturation of the Dutch film market of theatrical releases, finds Cynthia the figures of profitability in the US rather extreme in comparison to the Netherlands. These figures that show only a 10% of films released being profitable, do not apply to the Netherlands she thinks. But that is only the case when the lifecycle of a film is reflected including the sales of DVD. She mentions that probably no distributor makes profit on theatrical release alone (BFD distributes to the cinemas only, but drives on the supply of its three stockholding companies).

Cynthia finds the increasing focus on OWBO a logical result of the saturation of the market. Distributors want to prevent that films are already out of the programming before the BO peak comes. There is no second chance in the theatrical release of a film, so there is a lot at stake.

Cynthia sees the majors dealing with saturation by an increase of expenditures, pushing the film into the market and the focus on blockbusters. For independents this is harder, she believes independents try to defend their position by taking risks and spending more money, being more creative or by a more critical selection and carrying out the faith. There is always a situation that more people could visit the cinema more often, perhaps an increase of advertising by the entire industry would draw more audience to the cinemas, but you can never be sure. With holidays she thinks this is an exception, the run to the cinema and campaigning during these days definitely can enhance success on the long term.

BFD does not join in the game of extreme expenditures for the sake of it, the expenditures vary a lot per production but the budgets are not changed by trends. BFD does not release blockbusters in general; their mainstream films are a lot smaller. BFD has to critically select its films,

though sometimes BFD is obliged to release a film from its stockholders for its DVD release. This creates a bigger challenge in drawing attention. Nonetheless, Cynthia does not believe that it is harder to break through the advertising cloud. Because of the decline of advertising income of media, the advertising space is offered for stunt prices. These stunt deals are sometimes already considered beforehand in marketing plans. Cynthia believes BFD does not spend more money on films based on the fact they are 'bigger', instead of looking at quality and potential in general. BFD does not acquire its own films and sometimes the stockholding parent wants BFD to invest more in advertising campaign, simply because the rights were expensive. BFD always starts with a realistic prediction and then negotiates about the value. The audience also judges on the quality and not so much on production budget, unless they are extreme and revealed in the media she thinks.

Cynthia thinks an enormous increase in investment in marketing activities and particularly advertising generates more consumers but that the break-even point in this case is hard to determine. She doubts of this will give a return of investment. She complies that advertising has a direct relation on the box-office but that its actual effect is not clear. Strategies to minimize risk, according to Cynthia are original bustles such as joint-promotions, applying free publicity, targeting at a very specific audience and try to advertise precisely to this audience. She comments that this depends per film or audience whether these measures are applicable.

She gives the clear example of mainstream dance film 'Make it Happen'. This film has a young, urban nature and is predictably not so much appreciated by an older generation. This film was targeted through MTV and TMF. Advertising in other media could have had an effect but Cynthia says the waste would have been worse. Expenditures in advertising for this film was a necessity, releasing mainstream films has no point without.

Cynthia believes this is different for art-house films, these productions can find their own way through the industry with some free-publicity. Nonetheless, standard material such as trailers, poster and POS-materials are an obligation. An increase of advertising expenditures for art films do not necessarily have a negative effect on the perceived quality and credibility, Cynthia says you can adapt the look and feel of advertising to make it suitable for an art audience. Overhyping a film on television channels when this is totally unexpected could have a negative effect.

People are indeed more selective on their media consumption, but according to Cynthia promotion is becoming more complex also because of the increase of media offered. Nowadays it costs a lot of money to be present in all media and a selection must be made. For films it is hard to invest into internet structurally because films have a short life cycle. By the time the investments pay off, the film does not longer run in the cinemas. BFD also keeps on releasing films with different target audiences which enhances the complexity. Cynthia has doubts about the effectiveness of internet campaigns since it is so big and widespread. Films are also already present online, the largest and most important film websites collect materials and information and agencies spread the information on websites.

Cynthia gives an example on dilemmas in decision making; studies show that people zap when commercials are shown but the visual element is crucial for film. Trailers in cinemas are therefore very effective; it is an audiovisual medium presented at the right target audience (cinema visitors), prior to the right film (with the same target audience) and in the right setting (a cinema). Online trailers also have the audiovisual effect but first the audience has to find, open and watch the video. Targeting is more difficult through the internet. According to Cynthia, online reviews have an increasing amount of effect. In the case of newspapers, reviews mainly

have an effect on the art-house audience. Though she does not believe that PR activities are more valuable than before, PR is always valuable and needed. Free publicity has impact because the audience finds these messages more credible than advertisements.

Blockbuster audiences read newspapers a lot less whereas daily newspapers mainly affect audiences of quality art-house. Reviews published on the internet and in magazines are often more positive, Cynthia noticed. She also believes the actual reviews in TV weeklies are more often read than newspapers, but stresses this is a total different audience. The content of a review is just as important as the amount of exposure, but it depends on the film she says. For some films it would be better to have a large photo and only 3 stars, rather than a good review. Many factors play part in this process, such as the heading and location. Critics do not necessarily treat art-house different from mainstream, other than selection. This is because of the lack of space and the amount of films offered. Cynthia mentions that she personally notices that some critics put more value on their own opinion rather than on targeting their target group. These critics then review films that they consider important, not considering whether this film is suitable for the target group.

Cynthia notices that holidays and seasoning have an increasing impact on the box-office, those are popular times, but the media do not devote more attention to films other than in holiday specials on all leisure activities. More films are released in these times and a more critical selection in reviews and press-releases is made. Film executives do not necessarily invest more in these releases relatively, but more films are being released. In advertising she does see a clear increase by film coverage in these seasons- especially on television, but notes that only a limited amount of media space such as with abri's can be filled.

She believes WOM is stronger than advertising; it could make a must-see film whereas other promotions barely obtain such an effect. Negative word-of-mouth on the other hand limit the film's run. But WOM is not the only effect, Cynthia believes it is indeed valid to campaign a film later in its run when holidays come up. Pushing the film with press releases during also pays off, though Cynthia emphasizes the effectiveness of marketing prior to a film's release and doubts if investment at the end of a film's run pay off, other than in DVD sales.

Cynthia mentions that the amount of buzz in the US for a film is very important to success here; if a film was barely covered in the US this has a negative influence, though some films would be more suitable for Europe. The hypes in the US is especially important to major films. Day-to-date releases are therefore not always better for the buzz here, since the WOM is still not to a maximum in the US. Sometimes the buzz in the US has no effect. Buzz is a very relative factor; some audiences such as those of the film festival in Rotterdam are a special segment and have a large influence. Cynthia says she tries to enhance this type of WOM by sneak previews, premieres, promotions and pre-premieres.

Awards from abroad also result in a gain of media attention, the buzz is not only adopted but the nominations of awards also generate new attention in the Netherlands. From a marketing perspective, Cynthia values celebrities. Certain stars attract audiences or make it easier to market a film. On the other hand are some stars so diverse that the exact audience is hard to determine, but these are often a quality prediction instead. Cynthia believes the same counts for directors, though this mainly applies to the art-house segments since these are most familiar with directors.

Cynthia finds sequels easier to target but does not believe that Dutch distributors only release these in order to minimize risk, since they are

definitely not a guarantee to success. One possible explanation could be there are more sequels made than before. Cynthia gave an example with the Saw series, she found the sequels easier to target because of previous experiences. The box-office was higher for the sequels of Saw, but the expenditures were in marketing higher. Delaying a sequel release does not only decrease the buzz effect but during this interview Cynthia also suggested the target groups might have aged. Films such as Lord of the Rings have an advantage not only because its sequels are part of the storyline but also because the audience was familiar with the books. The advantage of an adaption of a novel is clearly, but according to Cynthia the prices for these films are also much higher.

A film with a narrow audience is easiest to target but on the other hand there is always a demand for the family genre in the Netherlands. Quality in such films is then very important and Cynthia thinks it is best to target at children and parents. Films for the elderly are hardest since these go to the cinema the fewest; women go the most, especially with friends. In case of couples are women most likely to choose a specific film. Kijkwijzer ratings could help target a film, especially 16+ is a necessity to some genres.

Targeting art-house audience is doable she thinks, but the quality is even more significant. The typical art-house audience finds it important to visit many films, even though they are more likely to visit a film after three or four weeks after its release, in contrast to mainstream audiences. A platform release is therefore easier to manage with art-house productions, finds Cynthia. Building up demand with a limited amount of prints and perhaps expansion of prints helps limit risks but is hard because of the pressure on screens. A cross-over film of very high quality would be most suitable according to Cynthia, but negative WOM would be disastrous.

Cynthia believes the clear distinction between art-house and mainstream is made throughout the industry, all players affecting each other. Art-house cinemas are a different leisure experience than mainstream multiplexes. The art-house industry is a lot less developed in Belgium than in the Netherlands, she thinks. Art-house films have to compete with mainstream in the multiplexes. She also thinks that in case of multiplexes, people decide to go to which movie at the cinema, making POS-material much more valid. But all audiences could change their minds when their first choice is sold-out or when companions have seen their first choice already.

In case of cinema visits, the audiences find it very important to be in a good atmosphere. Here she sees a big difference between the mainstream cinemas such as those of Pathé, offering luxurious seats and large service desks, and Louis Hartlooper, an art cinema with a warm atmosphere. There is no market for 'shabby' cinemas. Cynthia expects a lot will change in the cinema market, especially in digital projectors. This is especially noticeable by distributors (cheaper distribution) and by cinemas (easier) but not so much to the audience. She does not believe the audience really cares if they are watching a 35mm or digital projection, in contrast to the service offered by cinemas. An exception is made for 3D; Cynthia thinks this innovation will last but that the hype will wear off.

Cinemas and theatrical film consumption mainly compete with musicals and other leisure activities and less with home entertainment or piracy. Cynthia refers to the introduction of VHS not affecting the cinema industry either. She thinks these media compete amongst each other and with the rental stores, though these factors might enhance the popularity of film too. Day-to-date releases are an approach against piracy, though these measures are only in reach of big films by majors. Pirate activities might

be focused on these releases. Cynthia has faith in the existence of cinemas in the future.

Cynthia believes specialization by a distributor could improve success, simply because a focus makes a distributor better at its activities. It is a different approach to the market and not all companies could do that. Making a brand out of a distributor's identity such as Disney is not of importance to the audience, especially not in case of independent distributors. But sticking to small identity is proven not to be needed, Cynthia appoints the independents delivering blockbusters (and giving these independents the tag of mini-major).

Appendix 3.3.3 Valérie Depreeuw

Valerie believes there is a clear sign of saturation in the Belgian market, perhaps even worse than in the Netherlands. Belgium has more cinemas than the Netherlands but there are also more films released. This is because in Belgium more French films hit the cinemas, also in Flanders. In Wallonia this is of course the most extreme case, the French titles have to compete with all American titles. There are too many films released but there is not an increase in screens says Valerie. She draws a comparison with the Netherlands, there cross-over titles have longer runs in art-house cinemas but in Belgium this is not the case. The cut is mostly made on the runtime and in lesser extent on the amount of screens. Valerie says that in former times films would run for four months while two months is a long run today. Travel prints or platform releases where a print runs for 3 months divided over 5 cinemas are rare. In comparison to the Netherlands this is still a short period of time. Platform releases with an increase in prints during the runtime practically never happens in the Belgian market, with exceptions such as 'Slumdog Millionaire' and Milk, small films that win weighty awards.

The Netherlands also has a larger number of art-house cinemas in comparison to Flanders and Belgium. In Belgium, the distinction between the two markets of art-house and mainstream is less obvious. Any French title is most only released in art-house cinemas in the Netherlands but in Belgium these are more often considered cross-over titles. Valérie says cross-over titles run both in cross-over cinemas (such as UGC), in multiplexes and art-house cinemas.

Valerie mentions that the art-house cinemas have very small auditoria and have smaller budgets available for maintenance. The Kinopolis and Utopolis cinemas are the commercial key players and UGC offers cross-over cinemas. She sees a trend where the art-house cinemas and

multiplexes both have an increasing interest in cross-over titles. The art-house cinemas have less interest in the Film museum titles than before, where Valerie also works with. A result of this development is that even art-house and cross-over productions do not run over a very long time, as they do in the Netherlands. Mainstream titles have similar runs. Valérie does not believe that due to the policies of the cinemas, distributors are not willing to release small art-house films, even when this is becoming harder. A blockbuster trend is not valid in Belgium in such a way that Valérie believes all distributors always wanted to buy a successful film. So there might be a blockbuster trend but that was also relevant before. All distributors release films with faith in its potential (exceptions made in package deals), unless when a film is purchased as a script appears disappointing.

BFD Belgium distributes cross-over prints to the large multiplexes of Kinepolis since they have a market share of around 60%. The prints distributed to these multiplexes have a lower return of investment per print, but all together they account for one third of total box-office. Because the cinemas having an increasing interest in cross-over regardless of their nature, Valerie sees that in some cities the cinemas compete amongst themselves with the same films. She says the choice of art-house cinemas for these cross-over titles is not very evident since they offer a auditorium of lesser quality. In Antwerp Valerie tries to influence the market with film posters, especially at UGC. Valerie does not believe the art-house exhibitors become more commercial in their policies by choosing cross-over titles. Contracts prior to a films release are still more common in these cinemas. Some art-house cinemas made a shift from extremely art-house to broader titles, such as Vendome near Brussels.

In contrast to the Netherlands, Belgium does not have an increase of box-office in the past couple of years. The steady decline that was present in

the Dutch market until 1992 is still a trend in the Belgian market. Valerie says that especially the last three year there has been a decline in revenues. She mentions that some years are exceptions and therefore error the trend, such as the year that Titanic was released. When addressing the profit in the industry, Valerie notices that also in Belgium only a few films break even or gain profit from all sales and making losses at theatrical only. She believes this is a direct result from the saturation and short run.

During the interview Valerie brought a few budgets on recent films, calculating that she indeed spends between 25 and 30 percent of the predicted box-office. In some cases, the percentage is larger in the end because the expected box-office may not be obtained. Valerie believes there is an increase in the expenditures in marketing, especially from the majors' side. They have an international machine driving them. Independent cannot afford that, so they need to determine their own market. Valerie says this is harder because more and more films are being offered and especially larger films. She notices that distributors especially invest more in television commercials than before.

Valerie believes advertising indeed enhances the box-office revenues directly but that it is also part of a bigger process. Or as she says "you buy your audience". She clearly believes that when she would invest 500.000 instead of 100.000 on P&A on a film it would receive better box-office results, but this does not mean it would go break-even in the end. Valerie believes that executives in the industry need to become more creative but that major distributors are also very creative. In case of an independent, creative ideas still cost money. She notes that keeping things in own hands such as distributing material over dancing schools yourself can save money. Majors would have outsourced this to an agency and spent less time and more money.

In Belgium there is too much marketing on film releases finds Valerie, for some films she believe they over-advertise. She tries to limit advertising as much as possible, keeping a main emphasis on publicity efforts. PR activities are very important, especially for BFD Belgium. Especially for cross-over productions press has a large influence. Valerie believes articles and interviews published in the printed press are more credible than an advertisements and that people rather prefer to read an interview than look at an ad. She also notes this is cheaper, with interviews a film can have 2 pages of exposure, and a more expensive advertisement is still a lot smaller. Especially a large photo is of high value when generated as free publicity. For horror films publicity cannot do much, this is the film type that solely depends on advertising and other commercial marketing efforts.

The audience is not always open towards advertising, the first have to know a film is being released and second, when and where it runs. Before the audience is aware of both a distributor has to invest a lot of money. Valerie does not believe the audience has a negative attitude towards commercial advertising of films, not even for the art-house segment. Also the art-house cinemas prefer the distributor to invest more into advertising. She believes even the art-house audience needs to be stimulated with messages. Valerie thinks audiences have a negative attitude to some television commercials from products such as detergents but not so much with film. Film is a more exciting topic, it has visual elements and films are promoted over a shorter time since they have a short run.

When discussing reviews, Valerie prefers much exposure over content. Much attention by photo's and large headlines on the front cover are more important than a good review. Valerie does mention she prefers many stars together with exposure and good content. And an article with visuals is still more effective than an advertisement with the same exposure. BFD Belgium often buys an advertisement next to an article or review to

increase exposure. Especially for mainstream is that a good combination since it makes the film bigger as a whole.

Valerie finds it hard to advertise with a target on mainstream through newspapers, there is one large newspaper targeted at a broad audience but advertising here would be too expensive. She rather invests the budget in television commercials which are more effective for this segment. The same counts for TV weeklies. She mentions Humo, the second largest commercial magazine but slightly alternative. This magazine would be suitable for cross-over films but also for commercial productions. Humo is still expensive for BFD budgets. Valerie would have invested in more advertising in large magazines if she had larger budgets. She prefers weekly magazines over newspapers especially. Newspapers are only used one day, whereas a magazine lays around the house and is read by more people and several times spread over a week. A newspaper is more passing. In relation to the Netherlands Valerie believes the printed press has a different role, Belgium has fewer magazines and newspapers because the audience is much smaller; only six million Flemings and four million Walloons.

In Belgian newspapers the reviews are published on the day of the release, namely Wednesday and for magazines in the same week before the weekend. For some this would be Tuesday. In newspapers an interview can already be published beforehand. Normally newspapers do not publish articles or interviews the first week of release, unless a newspaper has clearly missed out on a popular film, though this is rare.

In the art-house segment negative reviews can have a very strong effect on the box-office. In mainstream this is not so much the case. For mainstream an interview could still be published even when the review is negative, especially when an actor is an interest of its own, such as Tom Hanks. Though Valerie does not think the interviews have much impact in

this case. Journalists do not discriminate in criticizing just on the fact if a film is an art-house or mainstream production. They do tend to visit more mainstream press screenings because they need to reach a large audience. Films they predict to be of better quality is also more often visited. Valerie says the Belgian journalists target their reviews at their audience but that they should do that more convincingly. The critics stick to their own opinions, sometimes being negative while the film would be perfect for their audience, she says. Belgium does not have a large girl magazines market or female critics so for some films such as *Make It Happen* (a dance film), the masculine journalists tend to avoid this production.

Belgium also deals with popular film seasons, but here the press does not adapt its coverage on film. The pressure on publicity efforts is therefore harder during these times. Valerie also noted that a film really needs to be a maximum coverage during the first five days of its run, this is heavier than before. If a film has started off well, sometimes she enhances the effect with an advertisement mentioning the amount of visitors so far. Other than that she does not invest in marketing efforts in the later run of a film, unless an award is won. When a film is doing bad, advertisements cannot save the box-office anymore.

Awards increase the amount of press coverage intensely; Valerie believes an award won helps the cross-over titles especially in the multiplexes. Valerie knows the awards draw a larger audience but she does not know quite which characteristics this award oriented audience has. Films that have a rather cross-over or art-house audience gain the most from awards, whereas mainstream films such as *The Departed* gain less; these films are rather broad and open already. The awards that have a significant value are Academy Awards, Golden Bears, Golden Globes and

Golden Palms. Nominations are only effective by the gain of publicity during a film's run.

In case of celebrities Valerie believes these actors and actresses attract audiences directly, but that it depends on the film and person. Kate Winslet in *The Reader* has a large fan base among men and women and therefore she helped the film. The attention surrounding Kate Winslet was building up during the awards and was at the highest point when the *Reader* was released in Belgium. Valerie says the film was planned at the right moment and that in this case a good star really helps. She mentions that Nicole Kidman would have had a lesser effect since she is less popular these days. Kate Winslet is a typical actress that attracts art-house and cross-over audiences which helped with this film. Valerie says at UGC the younger cross-over audience was attracted by Kate Winslet especially. In Kinopolis cinemas on the other hand, the effect was less. She notes that some stars such as Kate Winslet have a commercial value but not necessarily are attracting mainstream. Cameron Diaz on the other hand is mainstream but not accepted in the art-house and in lesser extend in the cross-over audience. Valerie believes the success of a film is not directly influenced by a star but that it is the combination of success factors, such as a star, the director and the awards. In most cases, the mainstream audience is not familiar with directors whereas the art-house sector is. Some exceptions are made, in case of director Quentin Tarantino for example, who has a popularity in the mainstream audiences.

Television commercials are very effective for promotion says Valerie, but then you especially need the familiar faces of stars. As she mentioned before is the visual element very important. In Belgium there are only commercial channels and there is no such thing as *Ster & Cultuur*, an attractive advertisement on the public channel only available to cultural leisure. Film posters are also very effective for promotion and even more

in case this is enhanced with radio advertisements. In case of internet advertisements Valerie has doubts on the effectiveness. She would never invest the majority of a budget into online campaigns. These ads would be too superficial, people click advertisements away or ignore those, and are annoyed by most of the advertisements. Sometimes BFD invests in internet campaigning at MSN, specially for Make It Happen since the young target group was easy definable through this medium. When addressing network marketing Valerie mentions that BFD does not involve in this by own means. In some cases BFD has tried to advertise on popular websites through the Belgian Mediacentrale, giving a description on a films target audience. Valerie says she is always disappointed in the click-through results while the reporting party is very enthusiastic.

According to Valerie trailers in cinemas are most effective, the longer in advance the better. BFD Belgium often has their trailers relatively late, reducing its effect. People that are in the cinemas are the most important target group, making the promotion here most important. POS-materials are of great significance too, in all types of cinemas. Valerie believes pictures from scenes, the so called 'movie stills' are also very important when the film poster or artwork is not very convincing, giving a good representation of a film's scenes next to trailers. Valerie believes especially the art-house audience choose their film beforehand, while at multiplexes visitors often peek at the displays. But also here a great share chooses beforehand in case of must-see films. Valerie does not know how these proportions are and finds POS-materials equally important in cinemas that are art-house, cross-over or mainstream.

WOM is very important, but Valerie believes the audience must have seen a film before they spread the word. In some cases trailers will also do. She thinks WOM is not spread based on buzz from the media; the audience might be influenced in their opinion about a film but do not spread

information they have gained other than from experience. Therefore WOM only helps later in a film's run, sometimes when a film is already out of the cinemas. BFD Belgium tries to enhance WOM through pre-premieres and tours with cast and crew. Valerie spots a significant increase at the box-office but only locally. Nation-wide tours are rare and cinemas must be willing to cooperate.

Valerie does not believe the buzz from surrounding countries has much influence on the audience in Belgium. Keeping a film's release close to its release in the United States might help at the box-office, but mainly because the film is not widely available through illegal downloads. For some films a prediction of success can be made, though most films are not as successful as Valerie predicts based on the results from the United States. On the other hand; films are dropping more extremely over time there, in comparison to Belgium. A success abroad could therefore only be limited indication of success in Belgium, especially for independents. On the contrary, mainly horror films do better in Belgium than in the United States. She says this is also the case in the Netherlands but more extreme in Belgium. Day to date releases are limited to majors but would not work for independents neither, since majors can make an event out of a film, whereas an independent cannot obtain such results.

The press is in fact sometimes affected by the results or especially media coverage from the US; some journalists remain absent from press screenings when they have spotted negative signals. Delaying a film's release does not have a negative influence on the credibility of a film. Valerie explains that Belgian distributors are very dependent on French distributors. Often a film is being delayed three or four times and so far Valerie has not noticed any negative effect on press, exhibitors or audience. Neither does the attitude of confidence by distributors. When BFD would invest more into P&A the opinions of the press and exhibitors

is still not altered. Valerie does not believe she herself is influenced by the production budget or largeness of a film. Her own opinion is not relevant either, she is solely determining budget on the potential of a film, regardless whether she find a film good or not. Since BFD does not acquire its own films, she sometimes has to enlarge a film's budget since the stockholders wish to.

Valerie is not sure if audiences go to the cinema for a specific film more quickly because 'everyone else is also going'. She thinks this is only attainable for great success productions such as *Slumdog Millionaire*. Mainstream can be made bigger because of a hype but Valerie is not sure whether art-house or mainstream are subject to influence of peer pressure. She rather appoints success to WOM and that in case of extreme successful films the media give repeated attention over a longer time, though she thinks this is very rare.

A factor that involves consumer acceptance is the presence of an existing concept. Valerie says that a book that is widely known in Belgium has an increasing value for a film. *Oorlogswinter* was a success in Belgium, not because it was a Dutch film with success but because the book was popular in Belgium too. In general are Dutch films not very successful in Belgium. If a book is not known, the film will not perform as well at the box-office. When the public sees a book is filmed, this enhances the interest in both the film and book. Joint promotions are difficult in the Belgium market; she mentions the arrangements are made abroad. Sequels have a similar effect on familiarity. Valerie says she has fewer experiences with sequels but believes marketing the concept as a whole enlarges the potential. She is aware that sequels need less marketing investments and are easier when it comes to targeting an audience. Nonetheless, Valerie only invests in a sequel when the results of the prequel are sufficient.

Creating a corporate identity or a brand value out of the distributor's name is hard for theatrical distribution, says Valerie. Lumière had a loyal audience for a while, and so had Cinéart but this was solely a niche market and based on quality. For wide commercial markets this would be less effective. Now Lumière has released a wide range of films and has lost its brand loyal audience. Branding would be easier through DVD says Valerie, through collection boxes and series of films. A brand is harder to communicate in cinema.

The differences in audiences is as follows, according to Valerie; the art-house audiences are somewhat older, equally as much women as men. Valerie sees a trend of students not being interested in art-house or most cross-over films. Art-house targeted at younger audiences are therefore not released by BFD. Valerie believes this is a trend of the last three years, she remembers this was different before and notes that while she was a student, the art-house cinemas were more popular among her age group. In some art-house cinemas, such as the one owned by Lumière in Brugge, the audience is more feminine and even over 35. Even though the characteristics of the art-house audience is very clear, pointing at the demographics and defining which of the 30+ public is a cinema audience is not possible.

(During my interview with VeerleValérie gives me a note, coming back to this subject: The note mentions that the art-house cinemas have audiences that are rather 'upscale'; with liberal professions, lawyers, teachers etc, but mainly in an age group of above 30ies. Currently, the youth that visits art-house cinemas are considered 'nerds'.)

Valerie notices that the difference between the art-house audiences and those of the multiplexes is still large and staying similar, while the programming of the cinemas changes and differentiating less. Determining the target audiences can be either easy or hard, depending on the film.

For *Make It Happen*, she notes, was targeting easy. In Belgium they focused on young teenage girls. For the Reader she found it also rather easy; older generations who read newspapers and listen to the radio. For *Millennium I* this was harder; the production is of good quality, of Swedish origin, full of unknown actors, somewhat commercial and has a thriller genre. The art-house cinemas will like the film because of its origin and quality but this film is still rather commercial. The multiplexes will like the thriller genre of the film and the commercial value, but the film is Swedish and full of unknown actors. The readers of the *Millennium* trilogy could be targeted but they have different characteristics than the target audience of the film. The readers of the book are also less eager to go to the cinema. Therefore Valerie aimed mostly at loyal cinema visitors, in order to start off with a high OWBO. In some cases the solution for this sort of films would be wide positioning, but this has more risk and is more likely to fail. She noticed that television commercials on the channel VIJFtv (comparable to NET5 in the Netherlands with a large feminine audience) had barely any effect for the film *Chéri*, a typical film for women. The film appeared not to be suitable for a wide positioning since its leadsperson was an elder woman having an affair with a younger man, making the film not attractive to younger female audience. The film ran in multiplexes also. According to Valerie, the older generations are not so eager to visit multiplex cinemas whatsoever. The cinemas offer a total different experience: smaller art-house cinemas have less hygiene (except for Lumière, stresses Valérie) and the quality of the projection is a lot less. The commercial multiplexes such as Kinepolis are focused on tidiness (though this depends on the personnel and management, stresses Valérie) and innovation. The art-house audience has a dilemma; they do not wish to go to the multiplexes since these are commercial, but the quality offered is better. Small art-house cinemas have their own atmosphere but are less tidy and the screen is dark. Valérie believes this has a direct effect on the audience and believes people visit the cinemas less because of this. The

commercial multiplexes offer digital projection, though Valérie does not think this will attract more visitors. Kinopolis charges higher ticket prices for digital exhibition and the average layman does not notice the difference. Currently with the economic crisis, Valérie believes the general audience is more willing to go to a 35mm projection.

In Belgium there is not a real sophisticated rating system applied to films. Valerie explains that children are either allowed or not allowed, with its age boundary on 16 years. In many cases this rating system limits the audience greatly, though it is not as strictly supervised as in the Netherlands. Films that are suitable for 12 year olds often receive a 16 year old rating. Valerie does not believe this scares off the audience because the film might have provocative elements. Youngsters might find a film more interesting, especially when they are officially not allowed to watch. Valerie thinks parents are mostly bothered from a pedagogic point of view. Valérie also mentions a case where children were allowed to a violent film because of its historic value.

Appendix 3.3.4 *Veerle Creve*

Also with Veerle Creve this interview starts off with a review over the saturation of the local market in Belgium and more specifically in Flanders. She says Belgian distributors face the same pressure. She says that sometimes 17 new titles are released at once in Belgium, which is practically impossible for all films to be successful. In some periods, it is undoable to release a film in Belgium or Flanders. She also believes not all films released in these regions are good enough to be in cinemas. The amount of films offered is increasing, visits are declining and the amount of screens stays either the same or decreasing.

Veerle believes that as a result, films are not only exhibited on fewer screens but especially over a shorter runtime. She recognises this trend in both the art-house cinemas and the commercial multiplexes, but the last mentioned are most subject to this trend.

In Belgium the week programming starts on Wednesday, on Friday the results of two days is evaluated and on Monday definitive decisions will be made based on the results of five days. Veerle says a film must be most successful in these five days otherwise the film's run will not be extended. She does mention that in case of some art-house cinemas contracts determine the runtime of a film prior to its release. In Lumière cinema this is the case, but this excludes participation on successful films.

In case of the blockbuster trend, according to Veerle an independent film distributor has to balance between its own preference for a beautiful film or reaching a large audience with profit as a result. Majors do not have to chose since these focus on commercial films only. BFD and Lumière sometimes release films with a dedication of love for cinema.

Veerle notes the printed press has most affinity with smaller art-house productions. Critics do not necessarily review these films differently than

mainstream but are more likely to find quality in art-house and cross-over. She sees practically all critics stick to their own opinion, whereas she believes it would be better if critics would write for their audience. Some Belgian newspapers cover neutral articles on films rather than reviewing these. She does not believe there is a difference between the tone of newspaper critics and those of magazines or TV-weeklies.

In Belgium most interviews are for films that have no position in the top 10 of BO results. She believes smaller films are most suitable for publicity efforts and gain the most from these investments. For these films the emphasis is on interviews and articles. Mainstream films such as the horror genre receive less benefit from publicity efforts and Veerle only provides the minimal to press. The minimal effort would be a press screening and a press kit.

Publicity is most important for cinemas rather than for large multiplex releases, because smaller films have limited advertising budgets. She thinks the audience would not have negative associations if an art-house film gets more commercial promotions. For films that are believed not to be favoured by the press also receive more advertising budget says Veerle. A large film cannot be successful without marketing, a smaller art-house release not without publicity.

In order to receive a review or an article in the Flemish media, the film needs to run with a Dutch print in Brussels and Flanders. Veerle says all films released are covered and no selection is made based on a shortage of space. Some magazines leave out releases that are very small and insignificant to their audience, but a newspaper could not disappoint its audience by not writing on the films released. Belgian newspapers have less space available for the amount of cultural leisure offered than before but still all films are covered. If the film critics favour a film they are more likely to write an article or place an interview in print, or if the newspapers

order them to cover certain films. During the holidays, in Belgium the amount of film offered also increases. During this time the Belgian media do not spend extra attention on film, which makes it harder to generate free publicity. Veerle says she really has to defend the BFD films in these weeks, by means of publicity and that planning is more important. Especially when competing films in the same weeks were in the Cannes film festival, journalists have precious interviews already. They will not be as eager to place an interview when Veerle arranges a director to travel to Belgium.

Veerle prefers a journalist being positive over a good position in a newspaper for personal confidence but does not know whether a good position has more influence. She believes the art-house audience rely on the reviews in especially newspapers, whereas mainstream is not hurt by a negative review. The art-house is loyal to its newspapers and in some cases to its critics. The mainstream audiences need repeated confrontation by television commercials and outdoor film posters. Nonetheless does Veerle invite all critics for press screenings. If she needs to select certain media or journalists for interviews, she would choose *LeSoir* in Wallonia since this is the biggest Francophone newspaper and has a cultural emphasis. In case of Flanders the decision would be harder: *De Standaard* is the biggest newspaper but *De Morgen* has an audience that has a larger interest for cultural leisure.

Its becomes harder to get noticed according to Veerle. She believes there is too much choice offered in case of media and leisure activities. Markets are changing increasingly faster and by the time people are willing to visit a film it no longer runs. People do not only have to choose for cinema but also for a particular film. Veerle says more effort is needed to draw attention but budgets are limited.

She thinks the art-house audience is more attached to its local cinema and are more likely to choose a film at the cinema itself. She believes mainstream and especially large blockbuster audiences go to the cinemas, the large multiplexes for a specific film they have seen on advertisements.

Veerle believes in the effectiveness of publicity efforts, though she points out that one can never be sure since the effect cannot be measured directly. For some films much press coverage could not deliver a good box-office whereas other films that almost went unnoticed in the media ran well.

Nonetheless Veerle believes a film at least needs the minimum attention in order to inform people of its existence. A film without exposure will not run. Cinema visits in Belgium are still declining and people barely get the chance to visit a film of their choice before it leaves the cinema. In the past film used to have a longer run, but the public visited the cinema more often too, this way people were more up to date about the films offered especially because of film posters and trailers. Nowadays people need more persuasion to visit the cinema. Veerle finds that she even misses out on releases even though she is in the industry, just because so much is offered.

The Flemish audience is not so much influenced by the foreign media or success of a film in the United States. The buzz does not cross unless the film is from the Netherlands, which makes the Dutch success somewhat relevant. The Francophone community is very dependent on the French media and therefore the success in France is very important for the success in Wallonia. Some Flemish journalists do base their opinions on the success or media attention in the United States. Sometimes journalists decide to skip a press screening because of what they have read in *Variety*. In general, Belgian journalists have more curiosity for films that have been a great success abroad or when important awards are won.

Exhibitors are mainly interested in the success and attention of a film abroad, in order to make a prediction on the expected box-office. Not for all films are box-offices abroad an indication of what a film could do in Belgium.

In case of the production budget, Veerle believes the press is more cynical when large figures are spent. Exhibitors and the audience receive films more enthusiastically if they have such a reputation. Veerle does not believe she adapts her opinion of a film or investment of hours based on production budget. She is more focused on the potential and quality, regardless of its size.

Veerle notices the Academy awards; the golden lions and bears have the most impact when generating publicity. Also the presence of stardom is recognised. Especially Nicolas Cage is a success factor in Belgium. Directors are not known at the Belgian mainstream audience, with exceptions made for Quentin Tarantino. For art-house and cross-over the director is more accredited. An big star in a production makes people more eager to watch a film, even though its quality might not be better. Veerle says this is because people feel some recognition and familiarity when choosing a film. When a stronger brand of the distributor is suggested, she does not believe this would help to create a loyal audience. It would be need a very long-term strategy, a lot of work and for independent distributors it would be undoable. Towards journalists, she says BFD Belgium already has a strong brand. Journalists know BFD offers a higher quality in French productions.

WOM is very important finds Veerle and BFD Belgium tries to enhance the effect with pre-premieres or a tour with cast and director. She believes positive WOM works better than confronting someone with a film poster 20 times, the audience actively participates on WOM and film is more alive because of WOM. Veerle thinks in case of positive reviews almost always

a film has positive WOM too. With negative reviews a film can still have positive WOM, for example with a mainstream film such as Scary Movie, though it will be less extensive as with good reviews. Veerle believes the combination of publicity, advertising and WOM makes a good success.

Publicity or marketing efforts after the release have barely any effect in Belgium according to Veerle, since a film does not run for a very long time. Next to that, are journalists in Belgium not very eager to place articles weeks after a release because they wish to be the first to publish news. The only chance is at the end of the year, when journalists make top 10 lists, in case of award wins or a great box-office milestone of a Belgian production. In case of advertising efforts, BFD Belgium invests in films after a release only if they are running well. The risk of a film with a drop at the box-office would be too high, so BFD Belgium has not tried this recently, unless this is intended for the DVD release. Veerle therefore would not know for sure if advertisements have an effect in this case.

In case of internet Veerle believes this medium only has an effect on the younger audience, up to students, simply because the elderly are less familiar with internet in Belgium. Therefore, the internet would be only suitable for mainstream films and not so much for art-house since this audience is from an older generation. Veerle is not sure if there is much to gain from internet promotion, since these people are also most likely to use illegal downloads.

In Flanders the rating system is not very elaborate. Only two rating are used; children allowed or prohibited, the age limit is 16. This situation has been since a long time and therefore Belgians are not paying attention to controversies in judgements. Veerle says it is not possible anymore to generate publicity out of a rating in case it limits an audience. In case of 'Zack and Miri Make A Porno', when openly objecting to a 'children not allowed' rating, it would even give bad credibility and negative publicity.

The film would have been perfectly suitable for 14 and 15 year olds, she said, but the title was too controversial. 'Steven + Sky' was one of the very few films where the audience and media gave attention to a 16+ rating, mainly because the film was successful in Cannes says Veerle.