Abstract

This paper covers promotional communication of a theatrical film release in the Netherlands and Flanders. The client, Benelux Film Distributors wishes to gain knowledge on effective communication applied to these markets so policy decisions can be taken more strategically.

A participating observation of BFD and the Dutch industry was the main source of the pre-research. This was done through a marketing internship at BFD Netherlands by the writer of this paper, for five months, 24 hours a week. Theories were found through an extensive evaluation of available and relevant publications. The actual research consisted of desk-research and expert interviews. Expert interviews were taken from the relevant BFD executives in both regions. This gives a clear indication of the experience by the business and of the knowledge that is not known. The interviews also determine whether the strategic measures suggested by literature are indeed suitable for implications by BFD in either the Netherlands or Belgium. In-depth interviews give the best qualitative results and are best when researching in-depth decision processes.

Two theories were found to be controversial and were also confirmed after extensive analysis. The most interesting conclusions appoint negative reviews to be harmless since only the exposure has effect. The same applies to reviews, though the exposure generated is mostly affective for art-house films and not so much for mainstream. The media landscape and local markets of both regions puts these results in context. The effectiveness of communication tactics and audience characteristics have also supplied new insights that could be applied to future film releases.

Through this research the need of future research in missing audience characteristics and preferences came forward.

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List of abbreviations

ABDF-VFDB	AssocationBelge des Distributeurs de Films – Vereniging van Filmdistributeurs van België
BFD	Benelux Film Distributors
BO	box-office
DFW	Dutch FilmWorks
FCB	Federatie van Cinema's van België
ICM	Integrated Communication Management
IMDb	Internet Movie Database
LTBO	long term box-office
MG	minimum guarantee
NVB	NederlandseVereniging van Bioscoopexploitanten
NVF	NederlandseVereniging van Filmdistributeurs
OOH-advertising	out-of-home advertising
OWBO	opening weekend box-office
P&A-costs	print & advertising costs
POS-material	point-of-sale material
Q&A	question & answer
SBS-effect	success-breeds-success effect
WOM	word-of-mouth

Acknowledgements

Nothing of these works provided in this paper would exist without the support of my dissertation and internship company; Benelux Film Distributors. The people in this organisation have provided the means that helped me grow in the best subject ever; film marketing.

Therefore I wish to thank all my colleagues that have kept me with patience, even through difficult times:

Mirjam van Ansem, Maartje Verhoeven, Hein van Joolen, Hanneke Leenders and especially the interviewees; Cynthia Ophorst and Diane Borst.

Also the support from the Belgian office is much appreciated, in particular my interviewees; Valérie Depreeuw and Veerle Creve.

Many thanks go to my dissertation tutor from Hogeschool Utrceht; Theo Bors. I owe my perception of my work to him.

My last special appreciations are for my father, who was faced with supporting me for two parents, too sudden and too unexpected.

Thank you all.

Diantha Nota, June 2009.

1 Introduction

This paper will cover promotional communication of a theatrical film release in the Netherlands and Flanders. The client, Benelux Film Distributors wishes to gain knowledge on effective communication applied to these markets so policy decisions can be taken more strategically. Both regions do not only have a different film market but also have a different media landscape. Taking these differences in account, BFD wishes to justify strategic tactics.

1.1 Introduction to the problem

The film industry is complex and dependent of many aspects deriving from culture, media usage, technology and the industry itself. In this field, where ‘nobody knows anything’ is a familiar saying, knowledge is indeed valuable. BFD is a young business and establishes itself in the Dutch and Belgian film distribution market by successfully releasing films into cinemas. In such a complex field, knowledge is power and determines survival. Several policy questions rise to the surface in everyday business:

- *Can we use tactics for certain films based on the success and strategies in the neighbouring country?*
- *Which differences should we take in account for these decisions?*
- *Which tactics are considered successful in this industry and can we apply these to either one of the regions?*
- *In short: what are the most effective tactics applied to both regions*?

1.2 Justification

Since little books or few studies have focussed solely on the communication aspect of success at the box-office, this paper will make a contribution by doing so. Most of the literature available is only applicable to the United States and either on smaller independent releases or major blockbusters. The industry of film distributors in The Netherlands and Flanders perhaps has a different nature and surely a different media landscape. Applying these features specifically will make this study valuable for all distributors in the mentioned regions.

The outcome of this study is even more valuable to BFD since this is such a young operator in the business, and even more so because of its independent nature. The paper will be providing practical and relevant knowledge, with an eye on BFD's specific situation.

1.3 Problem definition

When we focus on the knowledge we wish to gain we come to the following policy question:

Which, if any, tactics in promotional communication of a film release can be implemented in the Netherlands and Flanders by independent film distributors?

1.3.1 Sub-questions

Next, in order to make the research tangible the following sub-questions could provide us with a specific angle:

- What are the core communication activities of theatrical film distributors?
- To what extend are these different from the communication activities in The Netherlands and/or Flanders applied today?
- Which, if any, (new) insights are provided by the literature?
- How do these insights relate to tactics towards audiences?
- To what extend are BFD Netherlands and/or Belgium aware of these insights?

- Are the discovered insights applicable to the Dutch and/or Flemish film market?
- To what extend does the media landscape and the public in the Netherlands and/or Flanders have an impact on the feasibility of implication of these new insights?
- Which insights can we conclude to be useful implications or important knowledge?
- Which, if any, useful insights and/or knowledge are still missing?

1.4 Operationalisation

In order to develop the research question into a practical and feasible project, several boundaries must be set by means of definitions.

1.4.1 Promotional communication

The term promotional communication will be used to indicate any activities invested by distributors (or employed third parties by distributors) to increase the awareness of a specific film and/or to persuade the audience to visit that specific film. The activities are normally intended by the marketing or publicity executives and are pull strategies. Push strategies such as business to business sales and actual distribution do not belong to the definition, but the spreading of POS-material in fact does.

1.4.2 Tactics, strategies and measures

When looking up the terms tactic, strategy or measure in the standard Collins dictionary (2009) we find the following definitions:

Definition tactic: "*a move or method used to achieve an aim or task*"
Definition strategy: "*a long-term plan for success*"
Definition measure: "*a particular action intended to achieve an effect*"

The above definitions show a small difference between measure and tactic versus strategy, namely time. The term strategy would denote a long term plan, whereas tactics or measures involve every indented strategic action. The above mentioned terms denote intended actions by the film distributor with an aim for commercial success by the same film distributor.

1.4.3 The Netherlands and Flanders

The research on the Netherlands will focus on the Dutch territory in Western-Europe, excluding its post-colonial territories. Flanders will be treated as an autonomous region in Western-Europe, but since some statistical figures relate to Belgium as a whole, the analysis will acknowledge the possible diversion.

1.4.4 Independent film distributors

The term independent film distributor is used to define film distributors that are not related to major Hollywood studios. Further explanation about this classification will be provided in the theoretical framework. Some tactics used by major studios cannot be applied by independent distributors and therefore some findings may be excluded in the final conclusions.

1.4.5 Literature

The term literature will refer to all (written) sources used in the theoretical framework.

1.4.6 Insights and 'new'

Any knowledge, new approach or understanding of current knowledge will be named an insight. Insights of which BFD is not familiar with are considered 'new' insights.

1.4.7 Application and feasibility

As explained earlier, some tactics are not applicable to the circumstances of independent distributors in particular because of their nature. Other measures are not feasible due to their limitations. Feasibility or usability issues that are related to the specific Dutch or Flemish industry or media landscape will be dealt with in the analysis. This paper will not evaluate whether the new insights discovered are feasible in case of BFD the Netherlands or Flanders. For example, the economic feasibility or approval of the industry will not be statistically researched in that manner.

1.4.8 Usefulness, importance and impact

Any insight gained by this research providing an improvement, by either an increase of effectiveness or efficiency, change of strategies or a greater understanding will be considered useful. Measures that can be directly executed with an increase on the box-office revenues or a decrease in investment will be considered most important. Controversial insights or those that are highly effective will be considered of great impact and could also include measures on the long term.

1.5 Restrictions

This paper will focus on the activities of distributors in the Netherlands and Flanders. Therefore the research is limited to feature film. The writer of this paper is aware that similar products are excluded such as documentaries, short films, media art and adult productions. The justification for excluding these film types is simple: most Dutch and Flemish theatrical film distributors do not deal with these films in a similar way. These films are a different product category and belong to different distribution channels. The paper also neglects niche segments with exotic origins, those which represent no relevant market share or those without a relevant effect on the industry examined. This paper does bear in mind the differences between art-house and mainstream productions since distributors in the investigated regions consider both part of the core activities.

The second restriction is the exclusion of other distribution channels other than that of theatrical exhibition. Home entertainment via DVD, VHS, (paid-) television channels or internet will not be discussed in this paper, while these factors are closely related and of massive influence on the marketing decisions of executives in the industry. The successes at the box-office directly affect the sales revenues of the subsequent channels. The profitability of a film is linked to all channels, whereas most marketing activities play part during the first few stages. The theatrical release can make a financial loss but can be paid off in home entertainment sales, making the theatrical exhibition a marketing tool of itself. Since its relation is of such influence, marketing strategies to enhance the box-office performance is of much greater importance. Another reason why this paper focuses on theatrical release only is because of the nature of the client. BFD is involved in theatrical distribution only.

Another restriction is the small sample size; BFD has a relatively small team, limiting the amount of interviewees. The sizes of the industries and populations of the Netherlands and Belgium are also modest, resulting in a limited scale of sources. In order to deal with this restriction, qualitative research will be preferred over quantitative.

The final most important restriction is the focus on Flanders as an independent region. Flanders operates as an autonomous state in Belgium and is culturally independent. Nonetheless, most figures are based on entire Belgium, including Wallonia. This will be kept in mind during the analysis but it could still jeopardise the final market results.

1.6 Purpose and rationale

This research was initiated to achieve understanding of promotional communication in relation to box-office success. The objective is to serve BFD in gaining insight in the field of theatrical film distribution by providing the outcome of this study. This study will bind the theoretical knowledge based on academic literature with the practical findings of research. Recommendations will be made based on the conclusions of this study, with the intention of implication by BFD.

1.7 Structure

This dissertation will consist of an introductive chapter with information about the problem definition and its purpose. The next item will be a methodology, justifying the methods used in research. The theoretical framework will follow, preceding an explanatory chapter about the film industry. Results from desk research and expert interviews will be provided. Subsequent will the paper provide an analysis of the actual research. Finally the conclusions and recommendations will be presented.

To enhance reading comfort, the list of abbreviations will be provided at the beginning of the paper together with the table of contents and list of figures and tables. The glossary will be at the end. The bibliography will follow with references and other consulted sources. The appendix will be closing this paper.

1.8 Benelux Film Distributors

Benelux Film Distributors (BFD) is a joint venture of three independent film distributors and brings a wide range of films to the Dutch, Belgian and Luxembourgian cinemas. BFD has been established as a small film distributor in 2005 and has grown into an all-round player with relevant market share and position today. BFD has an office in Ghent responsible for Belgium and Luxembourg and an office in Houten for the Netherlands. With only 5 people in a fixed team, BFD Netherlands released 22 films in 2007 from Inspire Pictures (NL), Dutch FilmWorks (NL) and Lumière (BE). The releases vary between art-house and mainstream films like *The Good Shepherd*, *Oorlogswinter*, *Brief voor de Koning*, *The Reader*, *Silk*, *Duska*, *Il Y A LongtempsQue Je T'Aime*, *Kruistocht in Spijkerbroek*, *Hanibal Rising*, *Saw IV* and many more.
(Source: BFD)

2 Methodology

This study has the goal to provide us with clear insight in promotional communication of film releases. The recommendations should provide practical implications for the marketing executives of the film industry and specifically of BFD. Therefore, the research undertaken must relate to the practical world and should credibly contribute in the relevant knowledge.

2.1 Pre-research

A participating observation of BFD and the Dutch industry was the main source of the pre-research. This was done through a marketing internship at BFD Netherlands by the writer of this paper, for five months, 24 hours a week. The internship gave the opportunity to experience the common issues in marketing films in contrast to theory, which helps keeping the paper relevant for the industry.

2.3 Theoretical framework

Theories will be found through an extensive evaluation of available and relevant publications. These publications include articles from business journals, academic journals or stand-alone publications of a credible nature. The new insights gained from the literature will be summarised in the chapter of the theoretical framework.

2.2 Research

The actual research will consist of desk-research and expert-interviews with the relevant professionals from BFD. Finding new insights belongs to an explorative approach of research, but also evaluative since this research will deal with the understanding of current knowledge. The sample size of this research is relatively small (the industries of film distribution and populations of both the Netherlands and Flanders are small), which is why qualitative research will provide the most representative and in-depth results.

2.2.1 Desk research

Any credible source may be used for the desk research, preferably from the industry. These include books on local industries or media landscapes, reports, weblogs, news articles and audiovisuals.

2.2.2 Analysis of statistical data

Statistical data such as provided by the governments (CBS Statline and Statbel), the NVF and NVB (annual reports) and MEDIA Salles (yearbooks) will deliver insight in market shares, cinema visits and media usage in both the Netherlands and Belgium. These figures are credible and these figures are easy to compare.

2.2.3 Expert interviews

Expert interviews with the relevant executives at BFD were taken. This could give a clear definition of the experience by the business and of the knowledge that is missing. The interviews could also determine whether the strategic measures suggested by literature are indeed suitable for implications by BFD in either The Netherlands or Belgium. In-dept interviews give the best qualitative results and are best when researching in-dept decision processes.

Interviews were taken with the following professionals:

- Cynthia Ophorst, marketing director at BFD Netherlands
- Diana Borst, publicity manager at BFD Netherlands
- ValérieDepreeuw, marketing manager at BFD Belgium
- Veerle Creve, publicity manager at BFD Belgium

The results will be provided in the appendix and discussed in its chapter.

2.3 Analysis

The results of the interviews will be compared to the hypotheses and statistical data, leading to conclusions and recommendations. Statistical data will be appointed most credible, since these figures are factual and controlled for. A gap analysis between the literature and interview results will appoint the differences between theory and practise. By this method, shortcomings in the knowledge of BFD or faulty theories will come forth. Provisional conclusions will be drawn based on all the materials analysed.

2.3 Conclusion

Overall conclusions will be drawn and recommendations will be made in the final chapter, based on the finding from the analysis. Only conclusions that offer new insights or those with explanatory value will be discussed in the final conclusions. Recommendations will be made in the form of managerial implications or address suggestions for further study.

3 Industry

3.1 The film industry and theatrical consumption

The film industry exists just as any other industry to make profit. Though no other business has such an unique product and such extreme circumstances. Or as Squire states in the introduction of his book:

"*The public's demand and use of entertainment products such as motion pictures are unlike the demand and use of any other product. In no other business is a single product fully created at an investment of tens of millions of dollars, with no real assurance that the public will buy it. In no other business does the public 'use' the product and then take away with them merely the memory of it.*"
(Source: Squire 2006, pp.4)

3.1.1 Supply chain

The supply chain of the film industry is has many layers and windows. The complexity is visible in appendix 1.

3.1.2 Product type

Theatrical consumption is part of the product type film. In this case film is a leisure activity and an intellectual good, whereas it competes with recreational activities as well as home consumption of media. Demand is defined by the attractiveness of the experience provided by cinemas but also by the fashionable demand of film productions. In this paper we mainly focus on the demand of a film production itself, since this feature has the opportunity to be controlled by the distributor.

The film market is divided into two different product types, without a clear distinction and much overlap. In this paper we call the two product types 'mainstream' and 'art-house'. Mainstream films are considered to be commercial and targeted at the mass audiences, with art-house are often considered being arty or a niche. Art-house often has an inconvenient genre, content or structure. Mainstream films are made to be blockbusters and to achieve this huge budgets are spend on marketing and production costs, such as stars and special effects. Art-house on the other hand, deals with a smaller budget. The origin lays in the production of films; mainstream films are mainly produced by the major studios, art-house by independent filmmakers who have fewer financial resources to rely on. The films made by the major studios are considered to be the dominant product in the market, much moiré art-house films are being made in comparison but they receive a much smaller market share in box-office revenues. Mainstream films have wide releases opening on many screens at the same time but with a shorter run in comparison to art-house. In most countries, companies in the film market only deal with either mainstream or art-house films. Due to their market profile, art-house films are also called 'indie' (from independent).

Both film types can have all kinds of genres, depending on the format of the film. Mainstream films often have the genre horror, action, thriller, science fiction, romance, family or comedy. Art-house films could be considered documentaries, drama, costume, true stories, politics, war, life stories, etc.

3.1.3 The 'majors'

The dominant studios or the so-called 'majors' have a special position in the film market worldwide. These studios have both producing and distributing activities, resulting with power in the biggest influence on the Western film market. Their main emphasis is commercial success and they feed the world with mainstream films. They are often held responsible for over-marketing the industry with many wide releases and massive advertising campaigns. All of the studios have their origins in Hollywood and are thought to be the exporters of American popular culture worldwide. All of the majors have extra-curricular activities that provide them with large profits and a big influence. These activities are other media productions and franchise merchandising.

The following companies are considered 'majors':

- Paramount (Viacom)
- Columbia Tristar or Sony Pictures
- Buena Vista or Walt Disney Pictures
- Twentieth Century Fox (News Corporation)
- Universal (NBC Universal)
- Warner Bros. (Time Warner)

3.1.4 The 'independents'

The term independent could be used to appoint either studios or distributors not belonging to one of the major studios. The independents are known for their smaller market share in comparison to the majors and their niche films with a less commercial emphasis. The independents are more vulnerable because of their fewer financial means and less dependability by nature. These natural characteristics also provide them with more freedom and less pressure from mother companies, though independents are much more subject to dependence on the success of one film. The independents' films have the image to be more artistic with a certain atmosphere. These films are called 'indie' films, though independents may also be involved in mainstream.

3.1.5 The 'mini-majors'

The mini-majors are considered to become increasingly influential in the market over the past couple of years. They have produced numerous successful films with high quality standards each being a differentiating format in comparison to most mainstream films. These mini-majors used to be independents but have gained large economic success. A response of from the majors' side is the establishment of self-governing departments and daughter companies with a focus on art-house or 'indie' films.

The following companies are considered 'mini-majors':

- MGM
- New Line Cinema
- Miramax
- Lion's Gate

3.2 Film distributors

Distributors owe their existence to the international nature of film, state Croon & Bosklopper (2008). Because film productions are being sold and acquired internationally, specialized distributors arose to distribute the films in a certain territory and maintained close contact to cinemas' programmers. Film distribution is considered an unpredictable business, completely product-driven. The market figures in the industry have heavy fluctuations and so have the distributor's earnings. This is a reflection of an industry where single titles determine the existence of a business. Worldwide, the market is crowded, the offer is immense and there is direct competition from other leisure activities. The most important decisions a film distributor makes are how and when to release a film. A film can only be released once and theatrical results directly affect further channels.

The following belong to core activities of a film distributor:

- Acquisition
- Marketing
- Sales
- Actual distribution

3.2.1 Acquisition

The film industry is product-driven and therefore the selection of the films is very important.

There are several ways to acquire a film:

- A continuous flow of new content from a parent studio
- Ties with a production company with whom the distributor has a package deal or a deal with continuous flow
- Via an external sales agent, the intermediate between producer and distributors
- A single production acquired before, during or after the production, perhaps with an investment in the production itself

A film distributor often acquires its film licenses with a minimum guarantee (MG), devoting a minimum investment. This in turn means that the producer will not receive a share of the profit until the distributor has a return of investment. Different film distributors could acquire the different licenses of a film production: theatrical rights can be purchased apart from the DVD rights, television rights or online rights. Between these licenses are so-called 'windows', the timing of each release is determined by contract. This will prevent the different mediums competing on the same market, as would be the situation when a film is running in cinemas but is also available on DVD or seen on television (Croon & Bosklopper, 2008).

3.2.2 Marketing and publicity

When making a marketing plan for a film the following issues will be addressed:

- Is the film mass market or specialized?
- What competition will the film be facing?
- Is it a season film?
- Does the film have any star power?

- Sequel / franchise: what are its features for existence?
- Are nominations and awards expected?
- Has the film already been released elsewhere?
- Is there buzz already? What is there to be found online?
- Will the film lead the media reviews?
- Is the cast and crew available for publicity or premiere?
- What rating will the film have?

(Source: FDA Guide 2008)

All these attributes together position the film and create a concept. With this concept the audience can be profiled and strategies in targeting the audience can be made. The market executives will always focus on a target audience, though they hope ‘to break out’ into the entire public or ‘cross over’ to other segments. A distributor is therefore always anticipating on the results, the strategies are flexible to achieve the best result. In the film industry this is called marketability and playability. Marketability is the value of promoting the film to the audience, while playability is the actual performance of a film related to aspects of the film itself.

3.2.3 Sales and distribution

As the FDA (DFA Guide 2008, pp.25) mentions, every theatrical release is a joint-venture between the distributor and exhibitors. The distributor supplies the film, whereas the exhibitor supplies the opportunity to exhibit, the screens and location. The sales executives are directly linked to those of marketing, in order to optimize strategies. Because film belongs to the industry of intellectual property, the prints that are exhibited are rented by the operator with a license, instead of selling the actual print with its content. This means that distributors are responsible for the realization and costs of film prints, including transportation, security, dubbing and subtitling. Distributors receive a percentage of the box-office revenues, mostly around 40%. Distributors do not get a share from the advertising income, beverages or other secondary service profits of the exhibitor.

Exhibitors have a reasonable amount of power since there are often no alternatives to find and the market is crowded. Every week the box-office results are analysed by exhibitors and distributors, especially those of the weekends. Only the films with the highest profit per screen can stay in the programming, moving aside for new releases of that week. The result is a focus on films that start-of with a high box office in the opening weekend and most films only surviving a couple of weeks. Release dates move over the calendar to find the best timed release with the maximum amount of screens available and the least competitive films targeting at the same audience.

4 Theoretical framework

In the following paragraphs the relevant theories will be discussed per topic, summarised and leading to a structure for analysis. All of the theories together should form a relevant representative view on which tactics are best suitable for implementation.

4.1 Art-house and mainstream

As explained earlier, two main product types can be observed in the film industry. This paper will stick to Gemser, Oostrum & Leenders (2007) making a distinction between art-house and mainstream as niche products and mass market products. They also refer to the following definitions:

Independent or mainstream market identity (Zuckerman & Kim 2003), 'artistic' versus 'commercial' qualities (Bagella & Becchetti 1999, Baumann 2002), the available production and/or marketing budget (Geer 1998), the presence of star power or special effects (Geer 1998, Bagella & Becchetti 1999), the amount of screens on release (Reinstein & Snyder 2005), or content, genre, or narrative structure of the film (Bordwell & Thompson 2001).

4.2 Market performance

Murphy's Law (named after A.D. Murphy, Variety journalist – not to be confused with "Anything that can go wrong will go wrong") describes the unequal distribution of revenues in the film industry; the top 20% of films account for 80% of the box-office. Collins, Hand & Snell (2002) have proven Murphy's Law to be valid in the United Kingdom; the top 20% accounts for 85% of the box-office in 1997.

More studies (Valenti 2004, Vogel 2001, cited by Hennig-Thurau, Houston & Walsh 2007) acclaim the unequal distribution; 30 to 40% of all theatrical releases break-even, only 10% is profitable. These same studies explain the losses to be (excessively) compensated by single profit hits.

Krider & Weinberg (1998) add that the OWBO accounts for 25% of the LTBO and 76% of the films have its box-office peak in the first week. They also state that ‘sleepers’, films that climb in box-office over time, are rare and generally not intended.

4.3 Necessity of promotion

Lukk (1997) stresses the need for promotion throughout his book; solely producing and distributing a quality film would not lead to good box-office results. Hennig-Thurau, Houston & Sridhar (2006) teach us the audience predominantly needs to be informed through distributor’s efforts.

In addition is the film market dynamic; the exhibition conditions adapt to the demand during a film’s runtime (Devany & Walls 1999 and Gemser, Oostrum & Leenders 2007) and according to Krider, Li, Liu & Weinberg (2005) cinemas deal with over distribution worldwide. Therefore they believe pull-strategies be most effective.

Elberse & Anand (2007) believe pre-release advertisements to be attracting visitors who would have opted different films (with advertisements) otherwise. Next, they find promotions to raise expectations in the industry, especially affecting exhibitors, which is confirmed by Elberse & Eliashberg (2003).

Next, Kerrigan & Özbilgin (2004) elaborate the larger need for promotion in Europe; films released in Europe have been created with a focus on production rather than on marketing. They also believe the cultural and linguistic diversity to barricade. Another study of their hand (2002) calls marketing efforts to be of greater importance in Europe since its lack of strategic partnerships in film releasing. This study earlier referred to Kerrigan & Culkin (1999) revealing the hostile attitude of the European public towards film marketing, dating back to the post-war propaganda from the United States.

4.4 Advertising

Advertising is manifested to be a direct influence on box-office performance (for example by Prag & Casavant 1994, Elberse & Eliashberg 2003). Elberse & Anand (2007) add to this knowledge that the impact of advertising on the LTBO is lower for movies of lower quality. Hennig-Thurau, Houston & Sridhar (2006b) state a film cannot be saved by promotion after a bad OWBO.

Many empirical studies reveal advertising expenditures to be excessively high for theatrical film; 27% of total revenues on average, in contrast to 1 to 4% in other industries. (Rose 2001, Nelson 1974, cited by Basuroy, Desai & Talukdar 2006).Elberse & Anand (2007) spotted an increase in expenditures by 50% between 1999 and 2005. They refer to an interview with Marc Schmuger in Variety, stating the ascending pressure on marketing executives to invest effectively.

Highlighting another side of the story, Mohr (2007) cites a study of Court from 2004 showing a 65% of consumers feels bombarded with advertisements, with 54% claiming to avoid products with overwhelming advertising campaigns. Mohr adduces multi-task theories to be applicable to media consumption, suggesting consumers tend to ‘switch off’ or to be progressively selective.

Hennig-Thurau, Houston & Walsh (2007) and Moul (2008) believe the opposite; an increase in advertising still leads to better profits, which would indicate too little advertising is purchased. These studies agree with Mohr

(2007) on the missed opportunity of major studios by lacking product differentiation and targeting specific audiences.

4.5 Word-of-mouth

WOM is generally found to be more credible and easier accessible than information provided through promotion campaigns (Brown & Reingen 1987, Murray 1991, Banerjee 1992, all cited by Liu 2006), earlier studies of Moul (2007) in turn show good WOM to extend a film's runtime. Though, Elberse & Eliashberg (2003) have found WOM to be fading overtime, losing effect greatly.

Mohr (2007) even believes buzz marketing is best capable to break through the advertising clout. Buzz marketing in this study encompasses word-of-mouth and viral marketing.

A more controversial study by Liu (2006) claims the volume has an effect on the box-office, but the emotional valence is unrelated. This means WOM is always helpful, no matter what the message is. Nonetheless, the study adds that socially desired (positive) and popular topics are most likely to be spread wide. Another finding is that the actual experience of the film is not required before WOM is spread.

Gemser, Oostrum & Leenders (2007) comment art-house films benefit less from WOM because of its smaller audiences. Boatwright, Basuroy& Kamakura (2007) comply by showing WOM is most effective for wide releases. WOM moves across boarder and there seems to be a strong relationship of box-office performance of a film in the US to the performance abroad (Elberse & Eliashberg 2003).

4.6 Branding

Prag & Casavant (1994) state no relation exists between the production costs and quality of a film; nonetheless they note distributors spend more on promotion of expensive films. They discovered a similar relation with the presence of stars, award nominations and genre. Next, the study claims promotion expenditures to be more effective when clear communication attributes are present. Other studies support the importance of branding tools (such as Keller 1998, Levin 1997, Chang& Ki 2005), with a claim from Basuroy, Desai & Talukdar (2006) that credible signals specifically directly affect the perceived quality.

4.6.1 Genre

Genre is proven to be a convenient method by consumers to determine the story type of the film, leading to associations and preferences (Austin & Gordon 1987, cited by Desai & Basuroy 2005)

4.6.2 Starpower

Star power by both directors and actors seems to be unrelated to box-office success directly, yet indirectly it affects the production budget (Litman & Ahn 1998, cited by Desai & Basuroy 2005, DeVany & Walls 1999, Ravid 1999).

4.6.3 Existing concepts

Several studies (Hennig-Thurau, Houston & Walsh 2007, Litman 1983, Ravid 1999, Basuroy & Chatterjee 2008) teach us that communication with cultural familiarity is very effective, using an existing popular concept as a branding tool. Basuroy, Desai & Talukdar (2006) support this theory by finding advertisements more effective for sequels.

4.6.4 Institutional acceptance

Hennig-Thurau, Houston & Walsh (2007) support Litman's (1983) claim on awards having the best effect on box-office success. They reason awards are a sign of institutional acceptance. Gemser, Leenders & Wijnberg (2008) argue expert jury awards to be most effective on art-house films, whilst mainstream makes no distinction. Nominations are already sufficient for an increase at the box-office, besides winning (Deuchert, Adjamah & Pauly 2005). In contrast, ratings by censorships have no relation with success according to Litman (1983).

4.6.5 Corporate branding

Chang & Ki (2005) believe the market position of a distributor greatly affects the attitude of exhibitors. According to Zuckerman & Kim (2003) believe art-house and mainstream are conflicting, finding distributors must choose between either product type. Eliashberg, Elberse & Leenders (2006) provide a similar insight; distributors should increase focus on their corporate brands as an alternative for investing in existing concepts.

4.7 Free-publicity

Free-publicity is often stated to be a low-cost alternative for advertising, though the actual effects are not yet compared. So far, most studies have been on reviews. Krider & Weinberg (1998) have studies the use of press relations in general, acknowledging the big competition during popular seasons such as Christmas and summer. They believe these weeks are preceded by more media attention.

4.7.1 Reviews

Many studies (Eliashberg & Sawhney 1994, Nelson 1974, cited by Basuroy, Desai & Talukdar 2006) have theorised film reviews' purpose as expert information to reduce the high uncertainty on the film's experience.

Reinstein & Snyder (2005) conclude the effect of reviews is strongest for the drama genre and narrow releases, but absent for action movies and comedies. They believe this indicates art-house films being more affected by reviews, arguing these films have less certainty signals to communicate.

A controversial insight is provided by Gemser, Oostrum & Leenders (2007); reviews have a predictive effect on mainstream, art-house is affected, but particularly by the volume of reviews, not so much the tone. The study refers to the lacking signals and advertising budget of art-house in contrast to mainstream. Similar studies stress the importance of exposure over message (Wyat Badger 1990 pp.368, Shrum 1991, cited by Gemser, Oostrum & Leenders 2007 and Ravid 1999). In addition, Hirschman Pieros (1985, cited Gemser, Oostrum & Leenders 2007) discovered audiences to judge film quality similar as professional film critics. Elliott & Simmons (2008) expound positive reviews are more effective as a result of distributors reaction with efforts such as quoting critics in advertisements.

4.8 Success-breeds-success

Hennig-Thurau, Houston & Walsh (2007) reason higher advertising expenditures itself are a quality signal to the consumer. They argue that expensive films are more successful because of the higher investments made by the distributor. Films that are expected to be popular also receive higher advertising budgets (Einav 2007, Lehmann & Weinberg 2000, cited by Elberse & Anand 2007, Eliashberg, Elberse & Leenders 2006).

Elberse & Eliashberg (2003) introduce the success-breeds-success theory; success or positive perception leads to more success in a snowball effect. Elliot & Simmons (2008) support the theory by claiming distributors respond to success with more efforts. Hennig-Thurau, Houston & Walsh (2007) call box-office success affecting consumers as ‘social proof’.

4.9 Two-path model

Holbrook & Addis (2008) have developed the Two-Path-Model which shows A- industry recognition is not correlated to B- commercial success. A film could have either, both or none A and B. Nonetheless describes the model the actions intended for either A or B would affect the other negatively. The authors believe the experts and art-house audiences appreciate films for their artistic integrity, commercial oriented audiences enjoy impressive entertainment.

4.10 Involvement

Early researchers (for example: Spraos 1969) suggested films are inferior goods; solely entertainment targeted at the massed and used as escapism by the poor. Collins & Hand (2005) reject this finding based on Cameron (1990, cited Collins & Hand 2005) study. Cameron showed theatrical film visit in the UK has a price elasticity of 1.04, Collins & Hand concluded that films are normal goods.

Nonetheless, Individuals visit films solely for the experience and enjoyment (Hirschman & Holbrook 1982, Holbrook & Hirschman 1982, cited by Chang & Ki, 2005). Consumers sometimes enjoy movies of lesser quality for entertainment according to Holbrook (2005). Frequent cinemagoers develop stronger preferences (Zaichkowsky 1986, cited by Garlin & McGuiggan 2002). But preference does not necessarily lead to choice (Garlin & McGuiggan 2002). An actual Choice is often made in groups; cinema visit is a social activity (Collins, Hand & Linnell 2008). Involvement and uncertainty is lower when the choice is made by a group (Garlin & McGuiggan 2002).

Garlin & McGuiggan (2002) refer to Barwise & Ehrenberg (1988), claiming deliberate activities such as cinema visit to be of higher involvement than television watching. Though, the first mentioned believe involvement is still low while the film watching experience seems to be more important than preference for a film, which is confirmed by Collins & Hand (2005)

4.11 Audience

Cinema going is most appealing to young audiences from 15 up to 29 years of age, according to Elliott & Simmons (2008). Collins & Hand (2005) report 15 year olds visit cinemas most frequent, the frequency decreases when age increases. Next, their study shows the visitors up to 40 are most likely male, those over 40 are predominantly female. Collins, Hand & Linnell (2008) deliberate that children aged 10 to 14 are the most likely group to visit a film twice. They reckon this also counts for audiences with an economic advantage.

4.11.1 Genre preferences

A study on rental films by Collins, Fernández-Blanco & Prieto-Rodríguez (2009) provides which genre preferences belong to which target audiences. Women have repeating interests in thriller-mystery, drama, romantic and message films, men in action films. Comedy and adventure are enjoyed by both sexes of any age, though last mentioned has highest popularity among lower income audiences. Drama and message films are mainly consumed by well-educated culturally-oriented groups.

4.12 Media choice

Basuroy, Desai & Talukdar (2006) believe film trailers are important but can still not reduce all uncertainty. Other visions suggest trailers could result in too high expectations leading to negative WOM after the consumption of a film (Lieberman & Esgate 2002, cited by Liu 2006).

According to Austin (1984) cinemagoers find newspapers the most important source of information for film releases. This could be changing; Eliashberg, Elberse & Leenders (2006) expect a trend in a rise of internet expenditures, because of the increasing importance of word-of-mouse, denoting online WOM. Next, online discussions can give good representations of those in the real world regardless of deviations in demographic (Dellarocas, Awad & Zhang 2004, cited by Liu 2006).

Several studies (Hennig-Thurau 2006, Elberse & Eliashberg 2003 and Elberse & Anand 2007) discovered that after the film's release the promotion efforts by distributors completely lose effectiveness. One explanation given is the increasing effect of WOM over its runtime.

5 Results: desk research

Desk research has provided many figures and text explanations on each specific local industry. An oversight of the differences is provided in the appendices and these will be discussed in the analysis. The following paragraphs will treat the textual information found through desk-research.

5.1 Film industry in the Netherlands

In the Netherlands, art-house film is segregated from mainstream film towards the consumer. Jan Blokker, appraised journalist and film script writer, comments in Allemaal Film that the gap between Dutch high-brow and low-brow culture is extreme. He believes that the Dutch Film Liga started this in the 1920s by defining film as very lowbrow by nature and that everything that defines this should be abandoned. He believes that this is rooted in the Netherlands and has left a big fingerprint on film policies (Allemaal Film 2007, Tussenkunst en kassa). Earlier in this documentary, the voice-over by Jeroen Krabbé tells us that financial success is considered 'dirty' in the high-brow classes of the motion picture industry. The socialist movement in the 1970s is the suggested to be responsible for this with the result of denial of successful talent.

As a result today, Dutch film still only has a small market share and a bad reputation. The market is limited due to the little amount of Dutch natives throughout the world. The Dutch films with highest box-office ever all date from before 1986 (NVF Annual Report 2008). In general, practically all films distributed within the Netherlands are acquired from abroad. Dutch films can be acquired, though an investment by the distributor is more likely.

Dutch cinemas have a clear market profile: they exhibit either art-house or mainstream films, in contrast to distributors in The Netherlands which often do business in both. (Gemser, Oostrum & Leenders 2007) The audience of art-house films is considered to be more likely higher educated, social involved, female and 25+. The mainstream audience can be divided in more categories per genre. Examples of those are: romantic comedies, which are likely to attract a rather broad, low-brow female audience and couples on dates and horror and action movies, which attract a broad audience of young males up to 25. In The Netherlands, 14% of all people that go to cinemas go to art-house cinemas, making this a niche market. These art-house visitors do have a reputation of more regular visits.

The cinema industry in The Netherlands has a scarcity of screens in relation to the amount of films being released. Croon & Bosklopper (2008, pp.157) finds this scarcity gives cinemas a luxury position and long-term programming contracts are not very common in the Netherlands. They explain that every week on Monday the cinemas' programmers review the results of that weekend and make a planning for the next week.

The Netherlands is still behind on the amount of digital cinemas in comparison to neighbouring countries, with only 34 screens in 2008 (MEDIA Salles 2008). Exhibitors are less eager to invest in the new technology that gives the Dutch distributors a cut in the costs, neglecting the experience of the consumer. Many cinemas are also blamed to lack in renovating or renewing their inventory, with bad seats and facilities as a result. Rumours on the expansion of 3D releases are very alive instead.

Data from CBS Statline show that in 2007 12% of all Dutch women and 11% of men went to the cinema every month, the group that goes fewer than once a month but still 3 times a year represents 20% of all women and 18% of all men.

More interesting figures can be found in the NVF Annual Report 2008. A growth in the visits of art-house in the Netherlands is implied and so is the fading distinction between both markets. The amount of cinemas in the

Netherlands is declining, though the amount of screens stays about the same. The amount of screens per cinema is increasing, all following the trend of the multiplexes. The amount of released films is changing over time but the amount of films with more than 10 copies has increased with an exception in 2007, meaning that the market has fewer limited releases. Interestingly, the amount of screens has also grown in the art-house sector, while the amount of cinemas is the same, suggesting a multiplex effect on the cultural side. The Dutch public goes to the cinema 1,4 times a year, a figure that has steady over the past years. Ticket sales in the Netherlands were on 23,4 million in 2006 and 23,1 million in 2007.

Pathé, Jochem's (Utopia), Minerva and Wolff are the four important players in the exhibition market with taking 77% of all revenues. Pathé is the most important accounting for around 37% with most of its cinemas in the urban regions. Wolff is the second player with 20%. The three cities Amsterdam, Rotterdam and The Hague account for almost one third of the national box-office, with only 10% of the population situated in these cities (Media Salles Yearbook 2007: final edition).

In 2005, 26.556 citizens share one screen, a relative depressive figure in comparison to neighbouring countries such as Belgium with only 19.489 citizens sharing a screen (Biltereyst & Meers 2007). When we look at the figures from NVF (NVF Annual Report 2008) we see that this has improved to 25,965 in 2007 and counting the smaller cinemas also, this figure shows 23,000. If we look at employment only, the film exhibition has grown 17% between 1996 and 2004, suggesting an economic growth (Raes & Hofstede 2005). If we compare with market figures, ticket sales declined to 14 million in 1992, with a steady growth since.

Whereas the United States profits from a large summer break and its resulting teenage visits, this situation is not the same in The Netherlands. The summer has both peaks and a falls, depending on the weather and other competitive leisure activities of that year. The Christmas season is most important, especially for family films. After seasonal peaks, the revenues are lowest, especially in March-April and September.

In 1999 the rating system Kijkwijzer was introduced, after a lang history of censorships. Kijkwijzer advises on the harmfulness of films through symbols and age categories. These symbols could indicate violence, offensive language or sex, the age categories classify on 6, 9, 12 and 16.

Gemser, Oostrum & Leenders (2007) suggest the media applied to film in The Netherlands has a unique feature in comparison to surrounding countries: television weeklies are absent, other relevant film magazines are scarce and other media hardly pay attention to film releases. The writer of this paper has seen this situation worsen in the time of observation. The newly introduced film glossy Cut!, the subsidized art oriented Skrien and even the established magazine FilmValley all quit in a few months' time, leaving no film magazine behind. As result of this scarcity, the Dutch newspapers have an increasing importance for the Dutch film audience. Gemser, Oostrum & Leenders (2007) note that newspaper have taken the most important place for film reviews, with Dutch newspapers having an extreme high circulation and printing their reviews on the day before or the day itself of a film's release. Another observation noted by the writer of this paper was the concern of experts in the industry noting that not all reviews are being printed and not all films being reviewed. Only the best films get a review and tone of reviews therefore may be important because of this, in contrast to studies. In addition, Gemser, Oostrum & Leenders (2007) show that in the Netherlands newspapers with a focus on the cultural elite publish lengthier but fewer reviews. This makes sense to the point that art-house visitors are often considered the cultural elite. For art-house it therefore seems more important to achieve a positive review. Although art-house films have longer reviews, mainstream films are still much more visible in the Dutch press.

The following majors are active in the Netherlands:

- Sony Pictures
- Walt Disney Motion Pictures
- Warner Brothers (Time Warner)
- United International Pictures (jointly owned by Universal and Paramount)

The following independent distributors are active in the Netherlands:

- A-film
- Benelux Film Distributors
- Cinéart
- Cinemien
- European Film Partners
- Filmmuseum
- Independent Films
- Moonlight
- Multitone
- Paradiso
- RCV
- Shooting Star
- Twin

The following exhibition companies are key players in the Netherlands:

- Pathé
- Jochem's (Utopia)
- Minerva
- Wolff

5.2 Media in the Netherlands

The Netherlands belonged to the pillared countries with segregated public societies until the 1960s. Since then the Christian democrats, the socialists and the liberals have been the most influential groups. The Dutch press only has one news agency; ANP (AlgemeenNederlandsPersbureau) and has many associations for professional journalism.

Printed press: Newspapers in the Netherlands have a large stake in the Dutch media society. High circulation but especially many subscriptions indicate this. Also the Dutch newspapers deal with decline in readership and advertising income, yet these actively try to innovate through new media. 55% of the households had paid newspaper copies in 2005with a circulation of 3.8 million copies. Three publishers account for 90% of the paid newspaper circulation of which PCM is the most important having de Volkskrant, NRC Handelsblad, Algemeen Dagblad and Trouw. The market of news is therefore quite concentrated. De Telegraaf has the highest (paid) circulation of 650,000 copies, Algemeen Dagblad including several regional titles, has a circulation of 460,000. The free dailies have become increasingly important. The two free newspapers Spits (owned by de Telegraaf) and Metro (owned by Metro International), distribute around 450,000 copies through public places each and recently De Pers and already ceased Dag were added. There are over 8000 different magazine titles accessible for Dutch readers but the circulation of traditional magazines is declining. Over half of the circulation in public magazines is published by the Finnish publisher Sanoma.

Broadcasting Media: The Dutch media landscape has a clear distinction between commercial and public broadcasters. The programming offers is very diverse as a result. More commercial channels are introduced and the first signs of a fragmented trend are visible. The public broadcasters offer the opportunity of low-cost advertisements for to cultural leisure.

New Media: The Dutch public is among the most participatory populations online. Local community site Hyves is very popular with almost as much accounts as citizens. The participation online is relatively equally distributed.

Advertising: All Dutch media suffer from declining advertising incomes. As a result, the Dutch media tries to renew itself through new media and new formats.

5.3 Film industry in Flanders and Belgium

Even though Flanders is part of Belgium in government, the segregated bi-state system exists through culture and also in film consumption. Jeroen van der Kris (2009), journalist at NRC-Next even reports that there is no such thing as a Belgian cinema, especially not for Belgian productions. Whereas Flanders is used to subtitles, Francophone audiences are not and prefer dubbing, which is a rather expensive translation method. Flemish films are therefore often not released in Wallonia until a French distributor has invested in French dubbing. In this same article an anonymous commenter mentions that either Flemish or Walloon productions are not acknowledged in both regions until international awards are won.

Flanders is a small market for film releasing due to its population and the consumption is decreasing according to Erik van Looy, Flemish director:

"*In the era of Urbanus (late 1980s until mid 1990s) entertainment had more scarcity, DVDs and home cinemas were not founded yet.*"
(Source: NRC-Next article by Jeroen van der Kris)

His film 'Loft' is now best visited ever in Belgium, replacing the old record of 'KoKoFlanel' of 1990. (In the Netherlands this is worse; all of the top 10 best visited films were made between 1955 and 1986.). But Jeroen van der Kris (2009) adds that Flemish films are not very successful In the

Netherlands and vice versa. According to him, insiders would blame this on the language barrier. Flemish and Dutch are too familiar but still too odd in relation to each other, although Flemish children's productions are an exception to this. Well-known Dutch producer San Fu Malta agrees: in principle a Flemish film only achieves a maximum of 10 percent of the consumers in the Netherlands and vice versa. If this is really the case, bearing population in mind, Flemish films do have more consumers in the neighbouring region then Dutch films.

Distribution also develops into wide releases and shorter lifetimes. Flanders develops a similar system as the Netherlands by short programming and blockbuster films dominating the screens. Films do not get the chance to develop worth of mouth and are replaced by a more profitable film quickly. Seasons become increasingly important for box-office success, especially in summer. Windows in Belgium are relatively small in comparison to neighbouring countries: the timing frame between theatrical release and other media is shorter, often initiated to reduce marketing costs.

The art-house market is called to be a crucial but vulnerable market, especially focussed on cinephil experiences in the urban cities. Flanders knows only seven art-houses with Cartoon's in Antwerp being the most important, and five other relevant exhibitors in this field. Next to that, cultural centres occasionally exhibit these productions. Mainstream exploiter Kinepolis is now breaking into the segment with its Cinémanie, taking the top revenues. The audience of art-house films in Flanders is not homogeneous according to Meers (2004), but does represent higher educated people in their twenties or above. On the other hand, research showed that Flemish youth uses American film a substitute word for Cinema film, meaning that American mainstream movies are especially dominant for this age category.

Belgium is ahead in the world when it comes to digitalising its cinemas. In 2007 all Kinepolis screens have digital projectors. Paper film posters have changed into flat screens and lobbies have PlayStations. Kinepolis has replaced its ticket desks almost entirely with automatic ticket sales, and tries to stimulate the audience to purchase tickets online. Seats have a quick sensor system to indicate occupied seats. Multiplexes are specifically targeting at families, with special services and exhibitions with themes. As a result of more digitalization, Belgium is now also part of the 'home film cultures', especially due to the home cinemas (Barara Klinger, cited by Biltereyst & Meers 2007).

Belgium has a similar situation as the Netherlands and the rest of Europe when it comes to film acquisition; most of the films are bought from abroad. American mainstream films are most dominant with 77,1% in the Belgian market in 2006, with European films taking 15,9% and Belgian film 6,3% (MEDIA Salles). In 2005, the major distributors in Belgium; UIP, 20th Century Fox and Warner Bros, take almost half of the market share in revenues with only 15,8% of the released films (Biltereyst & Meers 2007). Kinepolis is also active as a distributor in Belgium. The industry of film distribution grows poorer with less diversity in the business. Ticket sales were around 23,8 million in 2006 and 22,3 million in 2007, with Belgians visiting the cinema 2 times a year. In 2007, 20.552 citizens share one screen, in comparison to the Netherlands with 25.965. The big players in exhibition are Kinepolis, UGC and Groupe Hanne (last mentioned only in Wallonia) with only 40% of the screens taking 68,5% of the market share in revenue. Kinepolis only is responsible for 46,6% of all revenues.

Belgium and Flanders always had many and a diversity of cinemas in the 20th century, though in 1980 Flanders has lost 2/3r, with 80% of the surviving cinemas located in the urban regions, attracting 92% of all visitors and merely showing mainstream blockbusters. At the end of the 1980s Belgium starts a pioneering policy to create multiplexes, cinemas with at least 8 screens outside the city next to shopping malls. These were specifically targeted at a younger audience. (Biltereyst & Meers 2007)

The following majors are active in Belgium:

- Sony Pictures
- Walt Disney Motion Pictures
- Twentieth Century Fox (News Corporation)
- United International Pictures (jointly owned by Universal and Paramount)

The following independent distributors are active in Belgium:

- A-film
- Belga Films
- Benelux Film Distributors
- Cinéart
- Kinepolis
- Paradiso

The following exhibition companies are key players in Belgium:

- Kinepolis
- UGC
- Euroscoop
- Utopia

5.4 Media in Flanders and Belgium

Belgium is among the best liberated countries on media regulation (De Bens 2004). Over 1.000 journalists are accredited in Belgium; the main cause for this is the office of the EU being located in Brussels and not so much national activities. The media of Flanders is dominated with a very national view as a result of the political situation. The Belgian media often is associated with populism instead of investigative journalism (De Bens, 2004). Flanders is among the most concentrated media landscapes in Europe with only five corporate owners, two of which, De Persgroep and Corelio, are dominating the market for 75% (De Brabander, 2007). In addition, the Flemish council journalistic ethics was only established in 2002 (Blanken, 2009). Belgium only has one news agency: BELGA, owned by traditional media and split into a Flemish and a Francophone department (European Journalism Center). The media market in Belgium has a trend of fragmentation with advertising revenues declining. Flanders today is still subject to Pillarisation with the Catholic pillar to be most powerful, followed by the Socialist group.

Printed press:

The newspaper readership in Flanders is declining, while readership in Flanders was relatively low already. 160 per 1000 Belgians read newspapers, with over half of the Belgians buy their newspapers daily as a single copy (European Journalism Center). The Flemish newspapers released themselves later from Pillarisation than, for instance, The Netherlands (Blanken 2009). The Flemish ‘qualitative journalism’ has a left-wing, egalitarian and anti-American reputation (De Roeck, 2008). The qualitative journalism would exist of daily newspapers such as De Standaard. De Financieel EconomischeTijd (FET) and De Morgen but even these have been accused of sensational reporting.

Broadcasting media

Television and Radio in Flanders is becoming increasingly fragmented over the years with a focus on commercialisation, affecting the quality and credibility negatively (European Journalism Center). Flanders has public broadcasting channels, yet these have a commercial emphasis.

New media

Flanders scores a bit better than average in Europe when it comes to digitalization, doing especially well at public availability. Research conducted by NUA in 2001 shows that 33% of the Belgians had access to the internet at home, against 32% average in Europe. Nowadays 56% of the population uses Internet, regardless the home access and 40% is connected to broadband infrastructure (European Journalism Center). Statistical research by the Flemish government shows (Vanacker, 2002b) more participation of the higher educated and males in Flanders, the lower educated and the elderly do not participate online or even have a negative attitude towards computers (Volckaert, 2002a). Higher educated people spend 7 times more time online than the lower educated in Flanders, lower educated listen more to the radio and watch more television (Volckaert, 2002b). Politicians and media organizations publish more with new media facilities but the Belgian public is more sceptical (European Journalism Center). Around 2 million Flemish have joined a social network online (Blanken, 2009), mainly the international oriented Facebook. Many newspapers charge online visitors for access to their articles and Google has been convicted not to link to Belgian newspapers in Google News. Weblogs on the contrary, have become very popular but the credibility of the traditional newspapers scores much higher (European Journalism Center).

Advertising

The media in Flanders are increasingly suffering from a decline in advertisement revenues. As a result many media business have merged with a larger increase in concentration in the Flemish media. Especially smaller sized media business went bankrupt or had to assimilate into larger corporations. Less content is being devoted to qualitative information and the need to recruit readers and memberships have been determining the content.

6 Results: expert interviews

Four interviews were taken from press and marketing executives from BFD Netherlands and BFD Belgium. During these interviews a profile is made on the knowledge of BFD per region. In this chapter the outcomes are divided over the structure from the theoretical framework. An introduction on the interviewees, the questions asked and summaries of all interviews can be found in appendix 3.

6.1 Art-house and mainstream

When addressing the art-house and mainstream distinction in the Netherlands, the explanation is given that the strong identities of films and cinemas are kept in position throughout the market, affecting each other. In Belgium a different trend arises: the interviewees see a trend of art-house and multiplex cinemas with great interest in cross-over titles. They call the distinction to be fading, but mainly in films offered. The audiences and market positions of cinemas stay relatively the same. The Dutch executives call the cinemas two different ways of going out.

6.2 Market performance

Interviewees from both markets seem to disagree with the claim of only 30% to 40% of films to break-even and 10% to gain profit, but only when it comes to the entire distribution cycle. It is confirmed that profits in theatrical distribution only are rare, though a Belgian executive noted the Dutch BFD office to break-even quite often. All interviewees believe the market is extremely saturated, Valérie Depreeuw added that Belgium might have more cinemas per capita but also more films releases. All interviewees in both regions have seen a trend of an OWBO emphasis and believe the market is becoming tougher, mainly because too many films are released.

6.3 Necessity of promotion

From all interviews we can conclude that promotion is indeed a necessity for all films that will run. The opinions differ on whatever may be the minimum. It is believed that for films with little budget can benefit greatly from free-publicity. Next, Veerle Creve adds that the amount of attention is not linear with box-office success. All agree film-posters, POS-materials and trailers definitely belong to the minimum efforts. Veerle Creve also notes that informing audiences is more needed today than before, because people visit the cinemas less frequently and the market is now much more dynamic.

Opinions on how promotional communication affects the decision making are not quite clear. Some of the interviewees admit the lack of insight in this process. The press executives give an explanation for this; the effect of free-publicity is hard to measure, especially since these efforts are never independent. Especially advertising is believed to be necessary for large mainstream films in order to be opted by consumers.

On whether the market is affected by high promotional efforts such as advertising expenditures, are the interviewees not clear. Mentioned is that directly it will not affect cinemas in their opinion on potential, though cinemas prefer films with high expenditures. All believe journalists are definitely not affected in their opinions.

The interviewees do not agree with the vision of European consumers having a negative attitude towards film marketing. Suggested by Belgian executive is the awareness of consumers on the commercial nature of the film industry and that this is accepted. The cultural diversity of Europe only seems an issue in Belgium, where the executives directly face a multilingual society. The success of American film is not so much blamed on the cultural diversity and lack of competence in the industry. Many successful American films belong to major distributors and therefore have different financial means.

6.4 Advertising

Advertising is indeed believed to have a direct effect on the box-office. Higher expenditures would lead to higher box-office results, though all interviewees stress the return of investment. The break-even balance is called to be shifted in the industry often, with other distributors spending more than the increase of profit generated. All interviewees believe quality is the most important attribute of a film. Advertising would be less effective if the quality is less. After a film has opened with a really bad OWBO a film cannot be saved through promotion efforts of the distributor.

During one of the interviews in Belgium, an evaluation is given on current film budgets. The 27% (25-30%) spending of the box-office revenue is confirmed, though Valérie Depreeuw stresses this percentage applies to films that reach their estimated box-office. The interviewees disagree with the rise in costs of advertisements in the film industry. The advertising incomes for media corporations are declining which results in stunt prices. Nonetheless, the executives all spot a trend of increasing advertisement expenditures by major distributors. The general opinion is that this is probably overdone and puts pressure on the industry. All BFD executives explain these tactics are not in reach for independent distributors, stressing BFD Netherlands and Belgium do not involve in such activities.

If there are too many advertisements on film already is not clear. Most of the executives believe the offer of both film ánd media is so large that the audience has to make choices naturally. Some even add that, while even part of the industry, they themselves miss out on new film releases. Cynthia Ophorst adds the arrival of internet makes the media landscape too complex. All opinions lead to the conclusion to much advertising is bought in the industry; nonetheless Cynthia Ophorst adds still more people would be convinced to go to the cinemas if more advertising was purchased.

6.5 Word-of-mouth

The tendency of the interviews is that WOM is acknowledged to be more credible and very effective. All interviewees note that negative WOM would definitely reduce the box-office success. There does seem to be some doubt about how WOM works. Films with a bad reputation of quality but with much attention can still be a good box-office success.

Whether buzz-marketing would break through the advertising clout is not entirely supported. Most of the executives believe WOM to be manageable, though some believe actual experience is needed. Especially the Dutch executives believe WOM can be generated by media-buzz, the Belgian executives think this will affect attitudes but not enhance new WOM. The interviewees do not have strong opinions on difference of WOM for mainstream or art-house.

WOM is indeed recognised as fading over time. The Dutch executives believe the media buzz but also WOM abroad enhanced success in their market, though this mainly applies to the opinions of journalists and exhibitors. The Belgian executives believe the Francophone audience is mainly affected by the French opinions, the Flemish audiences have no such influences, and the effect on Flemish journalists is limited. An exception is made for Dutch films; for these buzz does cross boarders.

6.6 Branding

The interviewees do not believe the production budget of a film affects their attitude towards films. They all believe they act on quality and commercial potential. Later in the interviews this was put in context; BFD's stockholders supply the film licenses and often ask for a bigger P&A budget because of the expenses made so far. They add that audiences are not aware of production budgets but only see the signals made by distributors such as advertising and free-publicity.

Genre is found to be an important branding tool indeed. The interviewees note that genres attract different audiences and inform the audience on what a film is like. They also believe stars and directors have the same effect, though this depends on the persona. Veerle Creve adds that Nicholas Cage is a clear example of the effect of stars; his films promise good box-office results. The diversity of an actor is also mentioned; some actors have a clear identity and therefore attract a strict target audience or fan base. Others with a diverse career are only an indication of quality. The interviewees mention that targeting very tight on a strict audience can be a solution to reduce risk, since there is less waste in communication reach.

Existing concepts are clearly confirmed to be important branding tools. These provide a positioning strategy and attract audiences. Cynthia Ophorst adds that these concepts, such as films based on books, are generally also more expensive. Valérie Depreeuw notes that some target audiences of the original concept such as a book might not be cinemagoers, and therefore a second audience must be targeted. Sequels function as a good concept, less advertising is indeed needed because of the familiarity and attention of the prequel.

Awards are indeed claimed to be of great significance, not only as a branding tool but especially as a free-publicity generator. Awards are believed to widen the film onto general audiences. One of the executives notes a cross-over film benefits more from (and depends stronger on) awards than mainstream. The most important awards would be the Academy awards, Golden Globes, Golden Bears, Golden Lions and

Golden Palms. Nominations are indeed already a good boost, though this mainly applies to the ‘best film’, ‘best actor’ and ‘best actress’ awards.

The interviewees do not believe in positive effect of corporate branding of a distributor’s name. Audiences would not be aware of the identity of a distributor and it was commented that this is very hard to achieve through theatrical distribution. Labelling would be more applicable to DVD releasing. All believe Disney and Pixar are exceptions, mainly because of a unique style, Walt Disney as a person and franchises. Specialising in a specific film type is believed to become better at distribution. It would also make business to business or business to press relations more effective. BFD Belgium mentions they had a clear brand towards journalists already through Lumière, though this faded when both distributed a more diverse range.

6.7 Free-publicity

Free publicity is not called to be of increasing importance by the interviewees but always has been important already. It is not seen as a direct low-cost substitute for advertisements since different films need different approaches. The Belgian executives appraise the value of free-publicity to be most important. The exposure generated through interviews, photos and headings is not only more credible but also too expensive to be bought as advertising. Mostly reviews are part of free-publicity but the Belgian executives state they have a clear emphasize on articles and interviews, rather than generating the attention through advertisements. Free-publicity attention after the release is called scarce in Belgium. In the Netherlands Diane Borst mentions practically all attention must be intended by the distributor itself through press-releases.

The season peaks are indeed recognised by the executives of BFD, though no increase of media attention prior or during these seasons is spotted. It is even said that more films are released and therefore free-publicity is harder during the seasons. The only addition attention that can be generated is in general leisure agendas.

6.7.1 Reviews

The interviewees believe reviews have an impact on the box-office, though the effect if larger for mainstream than for art-house. They believe art-house audiences are more likely to read newspapers and have an interest in quality. Mainstream audiences are not as much interested in reviews and are mostly affected by advertising instead. The interviewees point out that some films with little attention or negative attention, can be still good box-office successes.

If asked which is preferred; good position of review or positive appraisal, most choose for good positions. Diane Borst adds that art-house films a positive review in the film section would work, since these have an interest for film. They would open the film section and actually read reviews. Often it is called that a good heading and photo are preferred over appraising text or many stars. Critics do not seem to judge art-house differently from mainstream in their opinions; they often have more affinity with art-house though mainstream receives more exposure. In the Netherlands publishing space is scarce, as a result see the distributors a trend of narrow selection. Especially the large releases and good reviews are placed. In Belgium all reviews are placed, though the amount of exposure is dependent on the same factors. In both regions are reviews placed mainly in the same day of the release or at least in the same week.

Next it is said that critics sometimes write towards their audiences but in general the executives believe this is not done enough. Sometimes films are selected for reviews that do not fit the medium’s audience or the tone does not. TV-weeklies are called to be milder in the Netherlands, appointing newspaper journalists as specialised critics with critical views.

6.8 Success-breeds-success

Earlier the production budget was called to be affecting distributors' efforts somewhat, though this is not done consciously. The amount of advertisements was called not to be affecting exhibitors directly, though they prefer higher expenditures. It was also clear that journalists are not affected by higher budgets but are in fact affected by the buzz from abroad. The interviewees are not quite sure if great box-office success affects audiences but it does affect exhibitors extremely on a weekly basis. Some of the executives mention that efforts in a film's later run is only initiated when a film is doing well. Whether this has a snowball effect is not confirmed, too this seems likely. Especially award wins are called to be of great effect on other factors.

6.9 Two-path model

The interviewees do not believe commercial success or high advertisement expenses would affect the perception on the arty nature of art-house. Advertisements can still communicate an arty 'feel'. If the money was available, all would intend more advertising for art-house. On the other hand; these films are called to be suitable for press activities in contrast to mainstream. Mainstream film such as horror or urban dance films for young audiences are called to be affected by advertising only.

6.10 Involvement

All of the interviewees believe many audiences go to the cinema for a specific film, though most believe mainstream audiences to be 'looking around' at the displays at the cinema also. In contrast, Veerle Creve thinks art-house audiences are more connected to their preferred cinema. Cynthia Ophorst also thinks art-audiences wish to see many films, which denotes a less specific choice. POS-materials are not considered more or less important in either mainstream or art-house cinemas, argued that at both cinemas the preferred film can be sold out. Next, POS-materials would inform for future visits.

It was earlier agreed on that films with a reputation of lesser quality can still be a success at the box-office. Some interviewees appointed entertainment of lesser quality films is important, some acknowledged that film perhaps has lower involvement. In both regions the group decision making is mentioned as an influence, the Dutch executives add that women are more likely to make the choice when in couples. Diane Borst calls the choice for a specific film by mainstream audiences to be dependent on fashion and lifestyle, in contrast to art-house audiences which are older and better informed. Digital screens are called to be of lesser importance, though all the interviewees stress the importance of good service towards the consumer.

6.11 Audience

The interviewees indeed believe younger audiences are most frequent visitors, though this mainly applies to mainstream audiences. In case of art-house, some differences are made. In the Netherlands the art-house cinemas have an older audience, mostly women over 25 though students are also a relevant group. The Belgian executives believe the art-house audiences to be equally men and women, though the age is above 30 or even 35. In both regions these audiences are called higher educated. They see a trend of fewer students visiting the art-house cinemas over the past three years.

6.12 Media choice

Newspapers are considered important for film releases by the interviewees because of the wide circulation. The Belgian interviewees do stress advertising in newspapers is only targeting higher social classes. It is called that Belgium has a fewer diversity of magazines and newspapers because of the smaller audiences. The important magazines would also be too expensive for advertising. Diane Borst believes the limited TV-weeklies in the Netherlands are still of great importance for film, especially since these have a clear segment of the public.

The most important medium is considered to be trailers in cinemas. These would directly target the right audience, at the right time in the right setting with visual elements. The effect of trailers is considered great in relation to the costs. A comment from the Belgian side is made on the limited effect of trailers; trailers are often received too late and need a long run in order to be very effective.

All of the interviewees have doubts concerning the effectiveness of internet campaigns. Cynthia Ophorst notes it is a very widespread medium. Trailers on the internet would be less effective since the confrontation is different. They audience would first need to find, open and watch the trailer. None of the interviewees believe heavy spending in internet would lead to return of investments. Another comment is made by Valérie Depreeuw, the public would be online for the search of information and would be annoyed by advertisements, ignoring them more often.

On whether which medium or which strategy would work best for which target audience is not affirmed. WOM is believed to be very powerful but no clear statements are made on whether free-publicity, advertising or WOM is most effective except from the division between art-house and mainstream. Cynthia values television but also mentions audiences are ‘zapping’ during commercials. If publicity or advertising efforts are not effective after a film’s release (because WOM would be too influential), is hoped to be untrue.

7 Extended analysis

In this extended analysis the gaps between theory, results from desk-research and results from the expert interviews will be analysed. Each theory will be addressed and compared in order to achieve relevant conclusion. This chapter will also follow the structure as was preceded in the theoretical framework.

7.1 Art-house and mainstream

When defining the actual difference in product type, the market position of cinemas is appointed as the cause of continuance by the interviewees. Also the literature on the Dutch market has provided the insight that distributor's in the Netherlands deal with both product types. Interestingly, the Belgian executives note that both distinctive types of cinemas have an increasing interest for cross-over film, but the audiences remain the same. This is notable since Flanders has less art-house cinemas. We could therefore conclude that the distinction between art-house and mainstream indeed is kept by different audiences and cinema experiences. This would confirm Zuckerman & Kim's theory (2003) on market identity, though from a cinema perspective only.

7.2 Market performance

When looking at the figures available through desk research and provided in appendix 2.5 we can see a list of the top 20% films released in the Netherlands in 2007. The LTBO results from these films account for 75,79% of the entire Dutch market in 2007. Though literally Murphy's Law is not proven because it should contain 80% at least, we could definitely state a similar situation is going on in the Netherlands. In Belgium nu such figures were available, though the market distinction which offers better ground for commercial success would suggest a similar or worse situation.

At first, the Dutch market seems to be more subject to the saturation; the Netherlands has fewer cinemas and a lower frequency per capita. The Belgian executives give another perspective; Belgium has more films released each year, having the American films compete with the large French offer. This is supported by appendix 2.1.1, showing market share by origin. The market share of European films is substantially higher than in the Netherlands. We could therefore conclude that the saturation in both regions is comparable but Belgian faces a more dynamic market. Especially since the higher frequency per capita does not have to be equally distributed throughout the market.

The admissions shown in appendix 2.1 from the Netherlands since 1999 fluctuate somewhat, but the box-office seems to have a steady increase with an exception for 2004/2005. In Belgium both figures fluctuate heavily, increasing and decreasing around the same level. The Belgian interviewees have pointed out that the market is in fact shrinking, showing some concern.

If we look at the top 50 OWBO films of all times in appendix 2.6, not even half of these seem to have an OWBO that is 25% of the LTBO. At the bottom and the top of the list the relation seems to be missing most. An analysis of all films of a year or multiple years would be too extensive. Nonetheless, since the bottom of the list does not seem to fit the theory, we could assume this phenomenon is continued. The OWBO would then account for less than 25% of the LTBO in the Netherlands. The OWBO does not have to be less important in this case since the OWBO determines the programming conditions of the following weeks. An increasing trend may be spotted through the timeline in this table. Most films in this table have been released in the new millennium.

After elaborate analysis, the blockbuster trend seems to be a valid result. When looking at the executives experiences they all seem to agree that an increasing focus on OWBO directly derives from the market saturation. Films have to perform at the OWBO in order to ensure a favourable programming. Bigger films are bought and bigger expenses are made by majors for the hope on a blockbuster. These higher risks toughen the market for independents. Also the information on local markets found in books supports these findings, in both regions. In both regions films end up with short runtimes, but in Belgium this even applies to art-house films because of a small number in art-house cinemas.

7.3 Necessity of promotion

The need of promotion through communication is indeed stressed by the interviewees. More persuasion and pro-active information would be needed to reach the target audiences. The table in appendix 2.8 shows us the decision making process in the Netherlands. Almost 40 percent would be choosing a film because of its advertisements, around 30 percent because of the trailer and another almost 30 percent would choose because of the reviews on a film. Though multiple answers were possible, this would indicate the distributor's efforts in communication are indeed essential. This is has resemblance with Hennig-Thurau, Houston & Sridhar's vision (2006). Perhaps one could state that without any promotion, distributors should not release a film at all. This also confirms pull-strategies mentioned by Krider, Li, Liu & Weinberg (2005) are indeed best. Whether this has an increasing nature lately is confirmed by one of the interviewees. Since the audience visit cinemas not very frequently but the offer grows, more persuasion and communication is needed to achieve (re)cognition. This would indicate the existence of an advertising clout as suggested by Mohr (2007).

The mentioned importance by the audiences of these communication efforts seems to confirm Elberse & Anand's theory (2007) that visitors would opt other films with advertisements instead. The story of a film is mentioned most in the table with around 50%, though one must bear in mind this story is also communicated through the distributor's efforts. Still, the high percentage on story would indicate a product loyalty. 90% of the cinemagoers would make its film choice before actually going to the cinema. In addition, appendix 2.7 tells us only up to 10% of the audience would visit a different film as an alternative activity. This would indicate the theory to be faulty.

The interviewees clearly disagreed with Kerrigan & Culkin's idea (1999) that Belgian or Dutch audiences would have a negative attitude towards film marketing. The blockbuster trend mentioned earlier and the excessive market shares for majors and American films provided in appendix 2.3 and 2.1.1 reject this idea also. Belgian youth would confuse 'cinema film' with 'American film, suggesting at least a positive attitude by this group. Many mainstream films which were initiated are released by independents in the Netherlands, suggesting missing partnerships are not the cause but the lack of focus on domestic film. This is in contrast with Kerrigan & Özbilgin's studies (2002, 2004).

7.4 Advertising

All sources manifest advertising to be directly effective for box-office success. Nonetheless, finding the right balance for return of investment in order to at least break-even is mentioned to be the difficult trick. Since not all data on profitability of films are available, no representative conclusion for both entire markets can be made. An increase in advertisement still leads to better box-office successes, though all interviewees express concerns about the increasing difficulty to get noticed. Especially major distributors seem to make high (and risky) expenditures. The interviewees react that independents, and especially BFD, are not capable and willing to follow this trend. Yet, the P&A budgets of BFD still consist of 25 to 30% from the LTBO, or expected box-office. The increase in advertisement costs is not likely; both Belgian and Dutch media suffer from a clear decline in advertising income. The interviewees even believe the advertisement costs to be dropping over time.

Creativity, though still costing money, and selecting more critically on quality films is given as an alternative strategy. The interviewees clearly appoint bad quality films to be less successful at the box-office and that promotion cannot save a film which has started off with a bad OWBO. This confirms the findings of Houston & Sridhar (2006b) and in lesser extend of Elberse & Anand (2007). Suggesting presence of quality (or potential) to be most effective, one could state advertisements are not only less effective on the long-term but in general context.

7.5 Word-of-mouth

The importance of WOM is acknowledged by all interviewees and all written sources. Its credibility and social recourses are acknowledged. Nonetheless, all of the executives clearly prop on the effect of the content of WOM. Negative WOM is especially feared for its negative impact. The literature on both audiences assists on these findings. Strikingly, the interviewees note some films are successful despite of their reputation. If audiences indeed enjoy films solely because of entertainment, this experience would count most. One could state that the volume becomes more important while it increases, since gossip adds in entertainment value, while the content of the message applies on different experience values. When looking at appendix 2.8, we find around one third of the cinemagoers call recommendations to be influencing choice. This would mean WOM is a very important factor for promotion indeed with the word recommendation suggesting positive WOM over negative WOM.

The manageable side of WOM seems controversial. In general, buzz-marketing is called effective by the literature such as Mohr (2007). The Dutch executives support the manageable nature of WOM prior to a release, since WOM would react on media buzz. In Belgium, this opinion is less favoured since media buzz would affect attitudes but probably not make the audience start a conversation as a result. Analysing these findings logically, WOM needs an interactive element or differentiating news value in order to be spread. The interviewees believe event films are mainly reserved for major distributors with large resources. This would confirm Boatwright, Basuroy & Kamakura's finding (2007) that WOM is most effective for wide releases. Though, this is not proven to be linked with the audience size but news value seems to be valid.

Since experience is still very valid for WOM, both BFD offices enhance its effect by pre-premieres, Q&A tours and sneak previews. Especially local Q&A tours are called effective, supporting the importance of interactive elements and optimum experience. Managing WOM through opinion leaders, for example online, is less popular. Especially BFD Belgium has doubts about the effectiveness.

The interviewees are very aware of the fading effect of WOM, though the offices have some differences in international perspective. Flanders seems to be less dependent on foreign buzz, while Dutch media especially receive great influences from abroad, more specifically the United States. Both offices try to keep the local film releases as close to the American release as possible. Belgium calls internet piracy to be the dominant argument for this, adding releases shift over the calendar often because of its links with the French market. Desk research has confirmed the narrow (national) view by referring to the political situation as its cause.

7.6 Branding

The production cost of a film indeed seems to be a relevant influence on distributor's expenses and campaigning. The effect seems to be subconscious but the relation of BFD with stockholders have shown the effects. Since distributor's efforts are directly affecting the audience, the production budget affects promotion and box-office success. The interviewees do not believe the audience is aware on the production budget and it seems unlikely that this has a persuasive effect.

Other branding elements such as genre, star power, existing concepts and awards are indeed confirmed to help in communication and positioning by all sources. The interviewees have stressed high quality to be very effective. Quality perception is not necessarily directly deriving from the other branding elements, yet awards are already a credible signal of quality.

7.6.1 Genre

Genres appear to denote more than communication attributes or branding tools. The interview results clearly define the product type, audiences and strategies dependent on genre. Appendix 2.8 has already shown the differences in decision making of genre audiences; appendix 2.9 reveals media consumption is different among different genre audiences. One could conclude genre does not just determine communication but determines the film product and its consumption. Appendix 2.8 reveals that half of the cinemagoers were attracted by the predicted storyline. Especially genre gives an indication of storyline and film experience.

7.6.2 Starpower

The literature on star power provided many study results claiming that star actors or star directors do not have a direct link with box-office success. These factors would not be of significance in persuading consumers. The interviewees clearly disagree, claiming certain star actors are directly responsible for attracting visitors. These star powers are considered rare but definitely present for personas such as Kate Winslet, Nicholas Cage and Arnold Schwarzenegger. One explanatory comment is made; some stars determine the product type of a film. Diverse stars would only give a certain quality signal. The success of Kate Winslet's persona in the Reader was often given as an example for effective star power, though this could also derive from the won Academy award for best actress. When looking at the top 50 OWBO in the Netherlands in appendix 2.6 most of the films have star powers. Yet the prequels of the most successful films have started off without superstars, such as Harry Potter and Lord of the Rings. In contrast, these films are based on famous concepts. We may assume that cultural familiarity of stars has a similar attractiveness as other familiar concepts.

7.6.3 Existing concepts

In appendix 2.6 a table is provided with the top 50 OWBO films in the Netherlands of all times. This list mentions merely films that are based on familiar concepts, with only a handful of exceptions. The presence of these films in this list and most of those dating since the 2000 confirms the trend in OWBO, large films and existing concepts as a risk minimiser. The executives in both regions acclaim the existing concept. BFD releases many films which are based on books, though it was commented these films are a lot more expensive to acquire. In Belgium is was found that the audiences of these concepts, such as novels, might not be cinemagoers. BFD Belgium therefore targets general audiences among cinemagoers to achieve a good OWBO. Sequels indeed seem to need less advertising since the target audience can targeted very specifically.

7.6.4 Institutional acceptance

All of the sources found acclaim awards to be very effective for box-office success. The interviewees believe the Academy awards, Golden Globes, Golden Bears, Golden Palms and Golden Lions are most important. The awards that are meant to be of great impact are best film, best actor and best actress, yet nominations are indeed sufficient. The awards mentioned are all from expert juries, which reveals the importance of credibility and authority. Both the Belgian and Dutch office stress the value of the free-publicity generated through the awards. The film and person is always mentioned with the quality signal. Awards would widen the audience, though this is contradicted. The audience which is attracted by award films is still described as older and higher educated. These characteristics are similar with those of the art-house audiences. Award films are in this case just extremely successful among this age group.

7.6.5 Corporate branding

The believe of Zuckerman & Kim (2003) that distributors should chose an identity of either mainstream or art-house does not seem to apply to either the Netherlands or Belgium. In these regions most distributors release both. Independent distributors also release mainstream films; majors have an increase of 'indie' films and also release domestic products. If a distributor's strong market position would affect deals with exhibitors cannot be proven in Belgium or the Netherlands. In these regions long-term contracts are rare, since all films are judged every week based on their OWBO. Favourable positions are mainly a matter of economics, leaving Chang & Ki's theory (2005) unproven and probably not applicable. A corporate image towards the consumer is not believed to be effective, since the audience is not aware of distributors whatsoever. Branding theatrical releases was stated to be impossible because of its lack of tangible labelling (such as with DVDs). BFD Belgium claims to have owned a brand identity in the past through Lumière, thought the diversity of releases has damaged this. The Belgian BFD brand seems to be still intact towards journalists, offering higher quality French films.

7.7 Free-publicity

Free-publicity is the main focus of BFD Belgium and also of great importance in the Netherlands. The interviewees do not believe these actions are becoming more important because of the earlier mentioned advertising clout; press relations have always been very important. The advertising incomes of media corporations are declining and because of that the pressure on exposure increases, and thus on free-publicity. During the important film seasons the media attention on film does not grow in contrast to the findings of Krider & Weinberg (1998). During these weeks press efforts may be less effective.

7.7.1 Reviews

The controversial insight provided by Gemser, Oostrum & Leenders (2007) seems legitimate; the volume of exposure generated through reviews has more impact than the tone. In case of mainstream, reviews practically have no effect. The effect of reviews on art-house was believed to be stronger because of the audience characteristics, but many exceptions were given during the interviews. The interviewees believe negative reviews to be of strong negative effect. Art-house audiences indeed read more newspapers than mainstream audiences but the preference of headings and photo's for art-house gives a different signal. Nonetheless, because of the current media landscape in the Netherlands, journalists are obligated to select only a few reviews. In Flanders all films are reviewed, though the attention devoted is under pressure. Journalists tend to choose films they favour and films that are largest. The large films do not benefit from the reviews because the gain in exposure is minimal. Art-house films on the other hand benefit from all additional attention, making it more important to be favoured. TV-weeklies are called to criticise films milder than newspapers, but this only seems relevant for selection. The interviewees stress that journalists do not target their reviews to their audiences very well, suggesting the opinions are rather personal. This would contradict Gemser, Oostrum & Leenders (2007) by indicating that for mainstream films that are not extremely large, the amount of reviews is not a prediction of box-office success.

The tables in appendix 2.8 are contradicting all of the above mentioned findings. Drama visitors believe to be affected by reviews in their decision making. In contrast, so do the typical mainstream audiences of action and adventure films. Perhaps the questionnaire research in Bioscoopmonitor 2006 and 2007 was biased by audiences could willingly name an information source without proving to actually know any of those.

7.8 Success-breeds-success

Because of the trend in OWBO focus, the SBS-effect is valid just because unsuccessful films have short runs. Earlier it was mentioned that production budget affects the attitudes of distributors and as a result the audience. Very large films receive increasingly more focus by journalists because of the selection. Some of the interviewees have confirmed that in extreme cases, consumer acceptance and hypes make a must-see film. Critical appraisal would lead to awards from expert juries. All of the above indicates a snowball effect in success. In Flanders the journalists and audiences do not seem to be affected by foreign buzz as much as in the Netherlands. This would mean the Dutch release would benefit more from staying close to the international release.

In both Belgium and the Netherlands journalists are called less eager to publish articles on a film after its release, except for award films. This would mean journalists are not part of the snowball effect later in a film's later run. Another indication is that press efforts are indeed losing effect after a film release, but WOM is not the cause. The marketing executives have clearly seen positive effects of campaigns in a film's later run, but only when a film has not dropped too much in box-office revenues. A logical assumption would be that WOM does not dominate over advertising and press efforts after release, but replaces free-publicity instead.

7.9 Two-path model

A heavy increase in advertising for art-house films would not affect the art perception of the consumer, according to the interviewees. A trend in mini-majors seems to prove this. These were independent studios and distributors, now successfully pursuing commercial success. In contrast, mainstream audiences are called to be only affected by advertising rather than free-publicity. In appendix 2.8 we see the mainstream adventure and action audiences express to be affected by reviews in their decision making. These results seem highly unlikely, since mainstream genres can still succeed at the box-office after negative reviews. No conclusions can be made for the functioning of the two-path models for mainstream films.

7.10 Involvement

Appendix 2.8 shows 90% if the cinemagoers chooses a specific movie beforehand and appendix 2.7 indicates that only up to 10% of the visitors would have opted a different films as an alternative activity. This would indicate some product preference and involvement. Appendix 2,7 also shows only 3% of the cinemagoers visits the cinema alone, which is relative low in comparison to expectations from the interviewees. This means that for 97% of the cinemagoers the decision is made by multiple people, affecting the decision making process. Around 45% of the respondents in appendix 2.8 said to have chosen the film by him or herself. These figures do not seem very reliable; larger groups than duo's are also formed and the chance of making the actual decision declines. In this same table we see action, adventure and family film audiences to be naming the most factors that have influenced their decision making. These mainstream audiences are profiled to be young and frequent visitors. The theory of Zaichkowsky (1986, cited by Garlin & McGuiggan 20002) of frequent visitors to have stronger preferences seems confirmed.

When looking at appendix 2.9, one may conclude many communication sources are remembered to be affecting the decision making. This denoted claims could be biased, typical mainstream genres mention all information sources possible while the actual usage of all the mentioned media is unlikely.

This contradicts the responses of the interviewees. Three out of four believed the mainstream audiences were more likely to be affected by the POS-materials at the counter. A different explanation would be that younger audiences are better informed through a diversity of media and have stronger preferences because of lifestyle. The interviewees also stress the importance of good cinema experience and good service. This thought is confirmed by appendix 2.10. In this table the actual experience seems to be of great importance, while the factor 'entertaining film' is only mentioned by 18%. This would indicate that the cinema experience itself has more effect than promoting a specific film.

7.11 Audience

Appendix 2.7 and 2.11 provide detailed information on the profiles of the average cinemagoer in the Netherlands. Sadly, no distinction was made between art-house and mainstream visitors. In appendix 2.11 specifically we could draw conclusions based on characteristics. The frequent cinema visitor is young, urban and lives in larger families. The less frequent cinemagoer is under 55 and probably between 30 and 39, sub-urban and in families. Both groups seem to be higher educated and positioned in higher social classes. The typical person which is least likely to be a cinemagoer belongs to an older age group, lives alone or in duo's and is lower educated. The first two groups could appoint mainstream and art-house audiences. The interviewees thought the art-house audience were still frequent visitors, compensating a large group of the same age. This seems to be incorrect.

No such figures were available for Belgium while these would be very valuable. The interviewees in Belgium spotted a trend of students visiting art-house cinemas less frequently since the past three years. In addition, they believe the films offered by cinemas is integrating but the audience would remain similar distinctive. No such statements can be confirmed because the lack of monitoring.

In appendix 2.12 genre preferences are listed by youth and parents. Surprisingly are parents much more critical about genres they consider good or very good. The youth can be called less critical, contradicting earlier conclusions on involvement. The young group prefers mainstream genres such as comedy, thrillers and adventure/ action the most as predicted, followed up by horror after a long gap. Parents value comedy, romance and social issue film the most, denoting these would be the art-house target audience, followed up by adventure/action and psychological/ message films. These findings would support the current basic classification of audiences.

7.12 Media choice

Newspapers are not the most important medium for film releases as was claimed by Austin (1984). This is not due to technologic advances since. The most important promotion instrument is still the cinema trailer. The references Liu (2006) mentions about raising too high expectations seem invalid. No such thing can be found in any other source, no experiences by the interviews confirm such an effect. On the contrary; trailers are appraised by the interviewees for their visuals persuasion. When looking at appendix 2.8 we see around one third of the total audiences recalls trailers as part of their decision making. Strangely, only action film audiences seem to have a strong relation with trailers. In Appendix 2.20

the high engagement and low avoidance of cinema commercials adds even more value. All of the executives are very aware of the positive effect of trailers, though the Belgian executives mention they receive these too late for an effective long run prior to release.

Newspapers come second as an important recourse for cinemagoers. There is some difference between the Netherlands and Flanders though; the Dutch have more subscriptions on newspapers and appendix 2.15 shows the daily consumption is much higher. The Belgian executives explain this caused by the Flemish having a much smaller population, adding newspapers only reach higher social classes in comparison to the Netherlands.

The increasing importance of internet advertising was clearly doubted by the interviewees. The importance of word-of-mouse has raised interest but Belgium seems to be less active on these activities. If we compare appendix 2.18 and 2.19 some differences may be spotted. Internet participation in Flanders is distributed less equally as in the Netherlands. Especially the elderly and lower educated are behind in Flanders and Brussels. This would make internet less suitable for these target groups, yet these are also the least frequent visitors. If we look at appendix 2.13 and 2.14 we see these elderly watching television more frequently in both countries, though in Belgium this seems more extreme. In case of the lower educated, the Netherlands has more excessively figures.

8 Conclusion

8.1 Relevant conclusions

The Dutch and Belgian film markets are both saturated, though the Belgian market is more dynamic due to the larger offer. Each region faces shorter runtimes and an increasing focus on OWBO. Belgium is more subject to these phenomena because of fewer art-house cinemas. And whereas the Netherlands has a slight increase of revenues, is the Belgian market unpredictable.

In addition are the revenues made not equally distributed over the market, as ‘the winners are taking it all’. Almost all films released with the highest OWBO ever are dating from this millennium. As a result on the pressure, major studios raise the expenditures with potential blockbuster hits.

The smaller independents cannot afford risky expenditures and need to be more selective on quality. This is preferred anyway, since bad quality films without potential cannot be saved through promotion efforts. But even for quality films, promotional communication is a pure necessity in such a market. Audiences would chose to visit a specific film based on film characteristics, advertisements, trailers, free-publicity and recommendations. Because of the increasing saturation, promotion is becoming tougher and more crucial.

Next, almost all choices made for specific films are made prior to the cinema visit. Besides that, cinemagoers barely opt other films as an alternative. POS-materials are less important for direct decision making than expected and no distinction is made between art-house and mainstream in this process. Of course are POS-materials still important informants for future releases.

WOM is probably the most influential as promotion because of its trusted source. WOM and buzz are best manageable as tools if the messages have interactive news value or experience elements. Yet, the tone of WOM has no effect on the box-office and only the volume of WOM counts. Positive messages are preferred though; socially accepted messages are more widely spread. Mainstream films have clearly more benefits from WOM.

For reviews the amount of exposure is also more important than the tone, but these only have effect on art-house films. Because of the strict selection of reviews based on favourability and importance, a film is better off with a positive tone. All attention is positive, though the effect might be limited because journalists do not target their reviews very well.

The Netherlands has more benefits of the WOM and media buzz from abroad than Flanders. This is because of the internal focussed media climate in Flanders. Nonetheless, it is best to stay close to foreign releases to benefit as maximally and suffer the least from fading over time.

Branding elements are the most appreciated by audiences. Any form of familiarity could help; stars, genre, awards, existing concepts. These product features determine the audience and are most mentioned to be cognised. Therefore, these should determine the communication the most.

Awards are extremely effective for generating free-publicity, yet an award does not attract entirely new audiences but still quality oriented (older) groups. This must be kept in mind when enhancing the promotion.

The distributor’s corporate identity towards the audience is not crucial for survival, though it might be an opportunity for differentiation. Specialising could make one better. In the Netherlands and Belgium long-term contract are rare and therefore a strong (economic) market position is subordinate to a specific film’s performance.

Success generates more success as a snowball effect. A high production budget generates more effort from the distributor, these affect the market and audiences, in turn is a big film more likely to be covered in reviews, these reviews have their effect etc. Bluffing about the size of a film or altering one success factor at the beginning of the snowball stage could affect the entire LTBO outcome. Only journalists do not seem to react in a film's later stage, unless when there are awards involved. Free-publicity is less-effective in a film's later run anyway, being replaced by the credible WOM.

Art-house films are not affected negatively by commercial advertising an can remain their aesthetic identity through good product placement and branding. In contrast, commercial mainstream genres such as horror cannot solely depend on free-publicity if at all effective.

The involvement of film choice seems to be higher than expected, when other films are not opted for or many information sources make part of the decision process. Yet these figures could be biased and therefore need more examination.

When preferences, media usage and demographics are linked the distinction in mainstream and art-house audiences indeed seems valid. Older generations and higher educated groups indeed prefer message films and read more newspapers. The same counts for younger audiences; these prefer mainstream films and new media. These are the most frequent cinema visitors.

Young and higher educated audiences are most participative on the internet, in contrast to elderly and lower educated. Belgium is more subject to this than the Netherlands. These non-participating audiences can be best reached through television, or not at all since these are also the less frequent visitors. One must keep in mind strategies cannot be copied from one region to another, simply because the media landscape is different.

Trailers are the best promotion media for film releases. This is not only because these are targeted at the right audience in the right context. Cinema commercials achieve the most engagement in comparison to other media with only radio coming close.

8.2 Recommendations for managerial implications

Based on the previous conclusions recommendations can be formed applied to the specific situation of BFD. One must keep in mind these are general implications and applied specifically for independent distributors such as BFD. Some interesting, unexpected and controversial conclusions came forth by this research, which justifies this research.

The following recommendations can be made:

Fewer risks in promotion should be taken in the Belgian market in comparison to the Netherlands.

The dynamic Belgian market could result in less equal distribution, which is especially a risk factor for independents. High advertising spending would be more risky than in the Netherlands.

POS-materials are only of use for returning cinemagoers.

Decision making is done before arrival at the cinema and not so much by looking at displays. Involvement is also higher than expected. Influencing cinemagoers must be done before they actually depart to the cinema.

Even for quality art-house releasing films has no use without promotion.

All cognised information is intended through communication of a distributor's efforts, such as advertising, trailers or free-publicity. Distributor's cannot depend on WOM only, hoping for reviews or depending on push-strategies.

Generating WOM, even if not only positive, deserves the most attention, especially for mainstream films.

WOM only has a positive effect through volume, not through tone. Mainstream benefits the most from this attention because the message is more socially acceptable and these films are more likely to become an event. Actively spreading WOM and making this personal from experience or valuable news could make the difference of spreading or not spreading.

Generating reviews even if not only positive, deserves the most attention, especially for art-house films.

Reviews only have a positive effect through exposure, not through tone. Art-house benefits the most from this exposure because of limited advertising budgets and are less likely to receive much exposure. Distributor's should invest much in press relations.

Film in the Dutch market benefit more from staying close to an American release than in the Belgian market.

The Dutch market is more affected by the buzz of foreign countries and is not dependent on a neighbouring market such as France. This means the Belgian executives need to create their own buzz.

Commercial advertising does not harm art-house films in their aesthetic value directly.

Even commercial advertising can be positioned as 'arty'. When more budget becomes available, this can be spend on advertising without any harm. Mainstream on the other hand is not benefited by free-publicity only.

Communication should focus on giving a clear representation of a film.

Cultural familiarity is rewarded at the box-office; the uncertainty must be declined. The right target audiences are attracted when genre, stars and concept are communicated well through advertising and trailers.

Awards do not widen target audiences as expected.

Award won films still manage to attract target audiences with the same characteristics. This means the film does not break out onto other segments but is just very successful at this specific group. The communication then must be adapted to this group instead of targeting a 'general breaking-out' audience.

Success breeds success.

Once the snowball rolls, the entire market will be affected. Altering one of the first chains in this system such as generating many reviews through good press relations or showing confidence could result in better LTBO.

Internet is not the perfect media for film, especially not in Belgium.

Internet participation is lower in this region and some target audiences are entirely excluded. The effect of wide spread campaigns needs further proof in the future before high expenditures are made. Word-of-mouse on the other hand should become a focus in future, enhancing WOM.

Trailers are effective for other reasons.

Cinema commercials have the highest engagement scores. Running trailers over a longer time should be the main emphasis.

8.3 Recommendations for further study

This paper focussed on the significant elements of film promotion from a communication view. The objective of this paper is to gain knowledge on the process of these elements and explain its relation. These findings have resulted in recommendations in tactics that are apply to the practice in the Netherlands and Belgium. This paper did not research the statistical relation of these elements; neither did it investigate the statistical relation between budgets from these two regions. If one wishes to know how much box-office can be predicted or how a budget would look like, this paper would not be sufficient. The writer of this paper wishes to refer to the prediction models accounted for by experienced researchers such as MOVIEMOD by Eliashberg, Jonker, Sawhney &Wierenga (2000).

Next, this communication study did not examine audience opinions through quantitative research. A large scale research in this field would be highly valuable. This paper did not focus on these features since a great sociologic understanding and much more time is needed to determine all different target audiences. Also, the audiences change dynamically every time a film releases.

Finally, this thesis is not representative for all businesses in the local industries of the Netherlands and Flanders. The recommendations are formed and based on the experience and culture of BFD. A greater understanding of communication in film marketing is needed.

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