

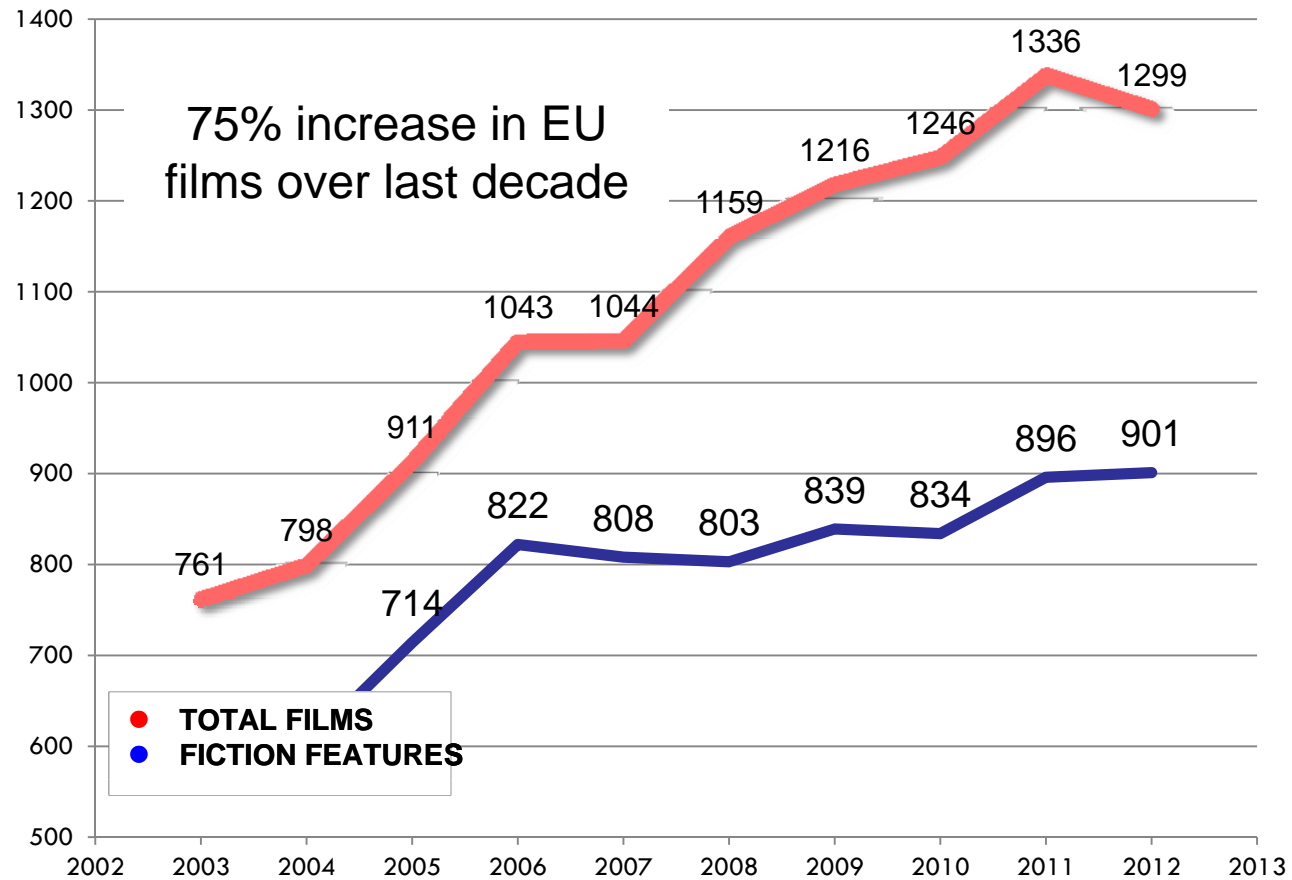


QUESTION

Module 1

**Should we support less films for an overcrowded market,
or focus on ensuring that the films we select find
audiences on new platforms?**

EU FILM PRODUCTION



Source: European Audiovisual Observatory

www.sampomedia.com

EU MARKET SHARE

MARKET SHARE

- 328.5m for EU films (35.2%)
- Of 993.3m total

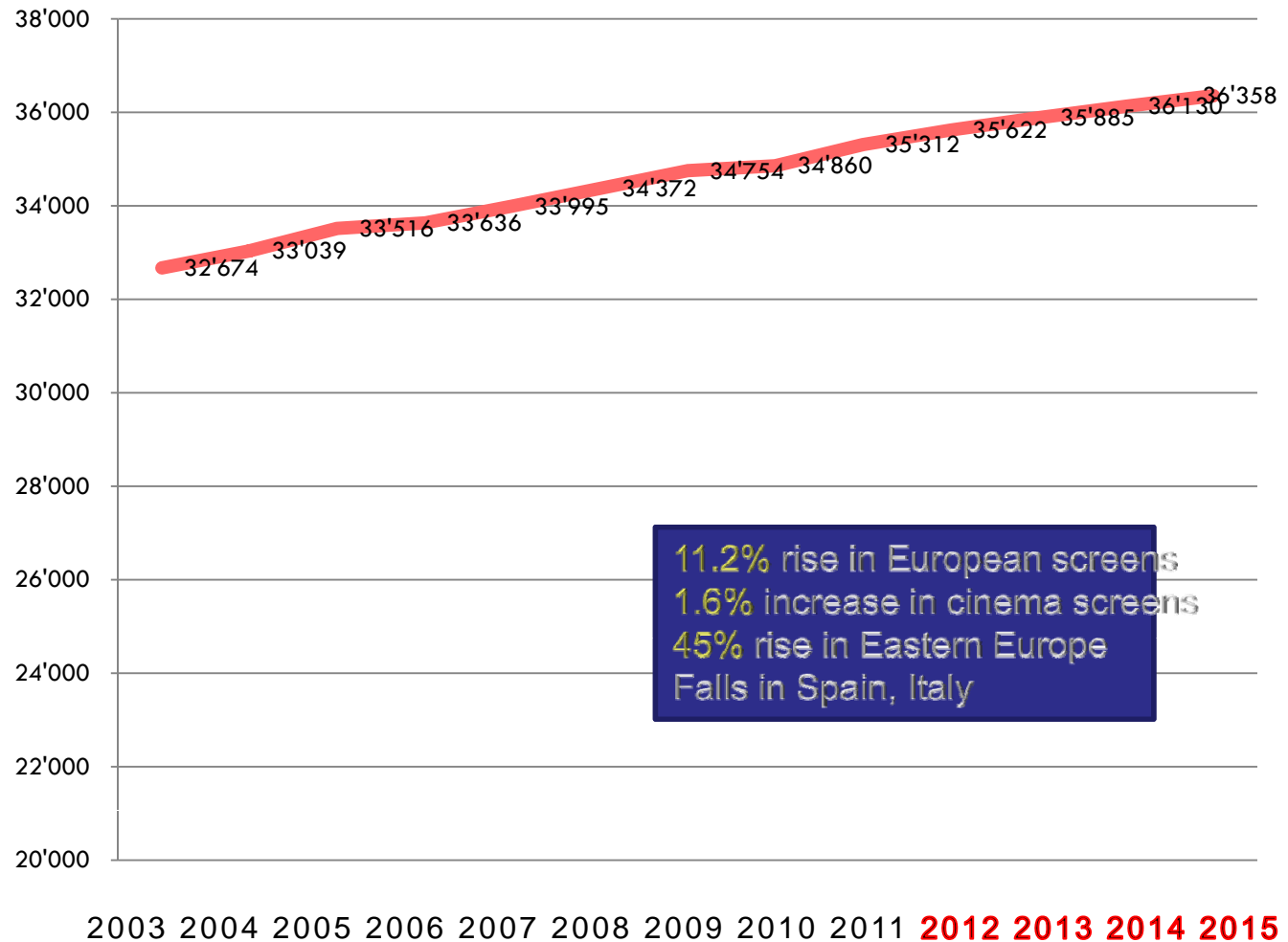
SKYFALL

- 44.4m admissions
- 4.8% marketshare

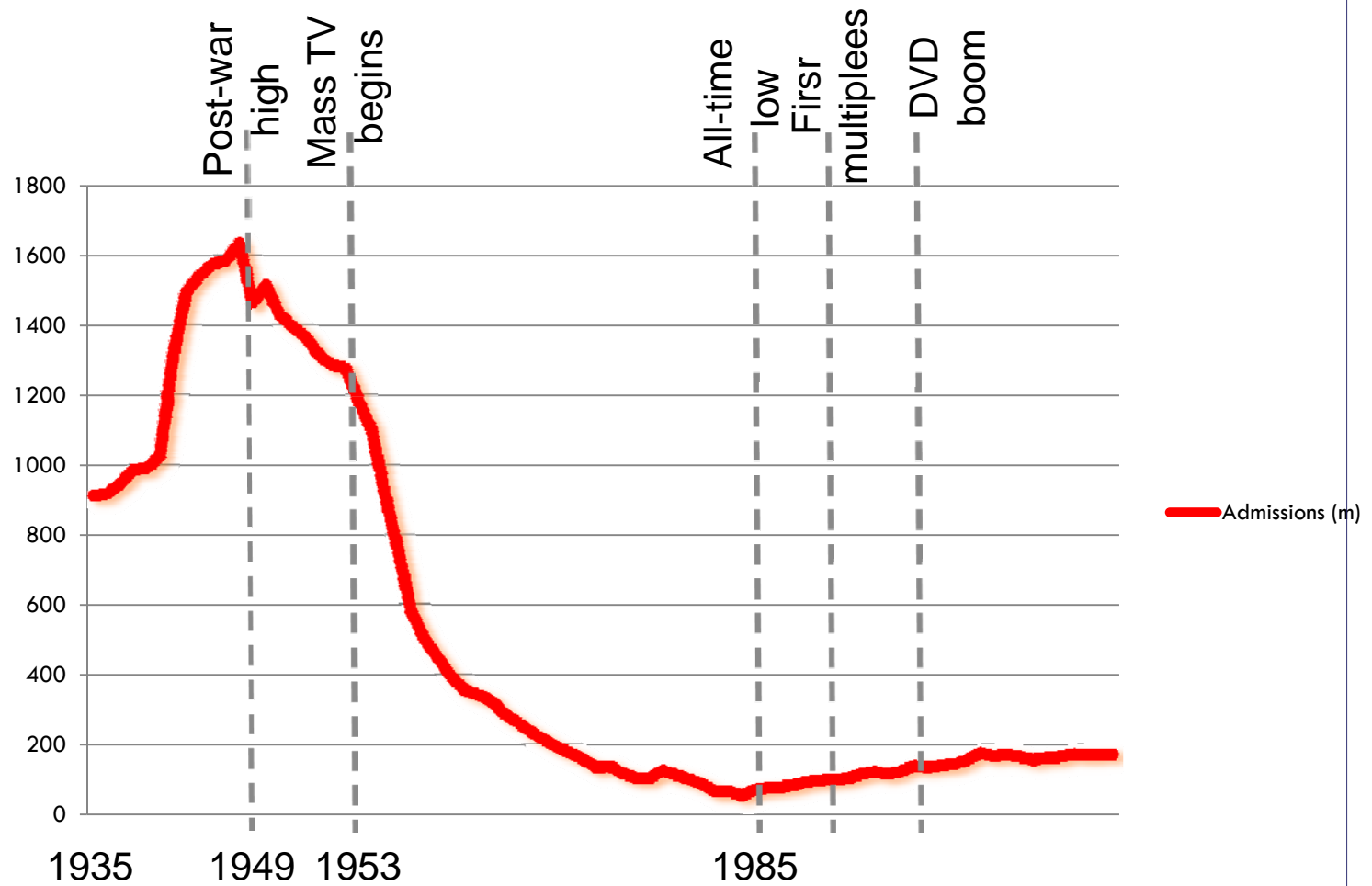
TOP 20 (1.5%)

- 105.4m
- 52% of EU total
- 98.5%, 178m (19% share)

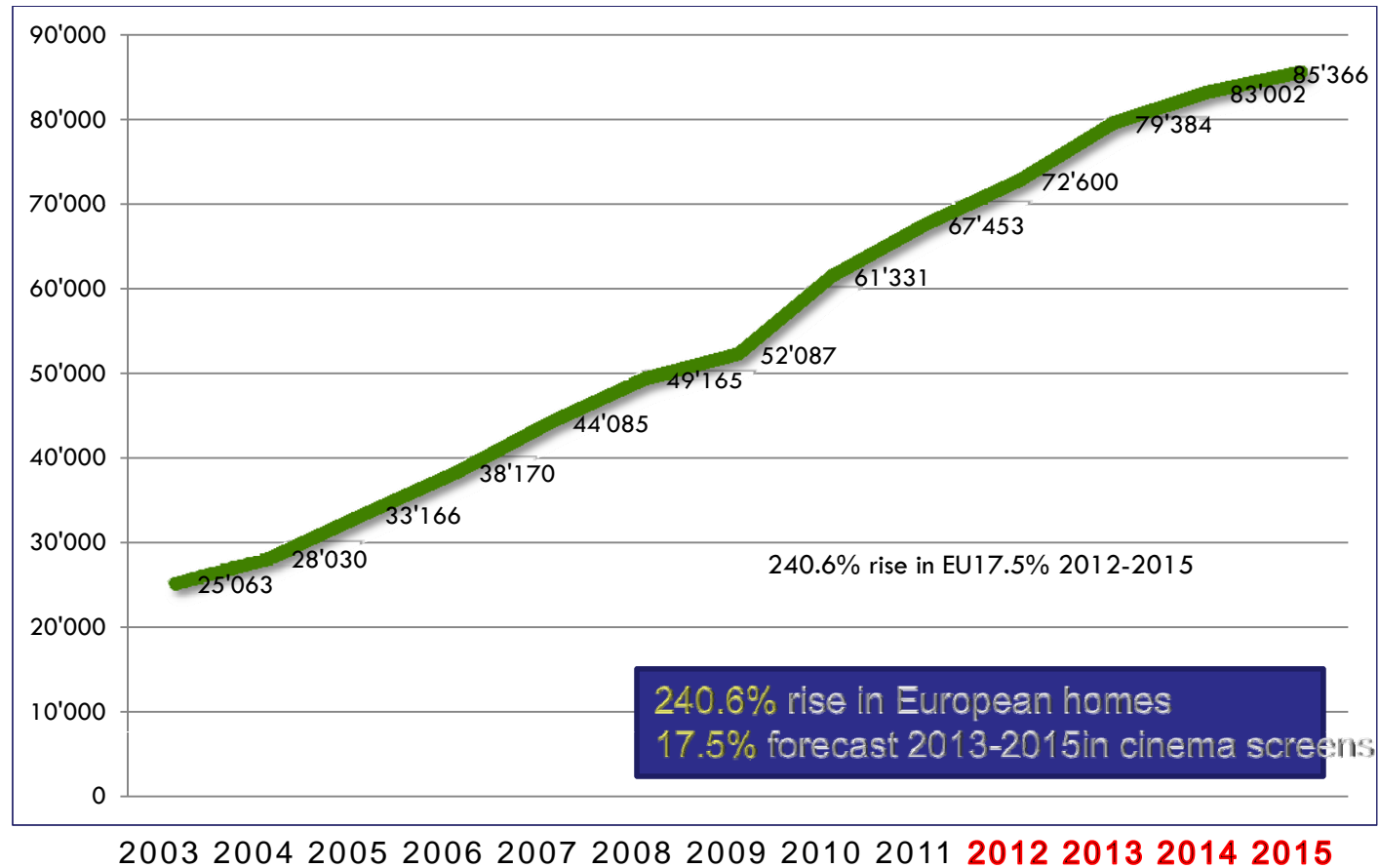
CINEMA SCREENS EUROPE



ADMISSIONS DECLINE (UK)



ON-DEMAND HOMES



Source: Screen Digest

MORE MEANS TO ACCESS FILM

- 70% Europeans watch HD on TVs by 2016
- 40% have 3D compatible TV by 2015
- 46% increase in tablets 2011-16 (from 14m)
- 30-40m Smart TVs
- First wave of D-cinema completed 2015
- EU wants universal 30Mbps connection 2020
- Streaming overtakes DVD (2013) LoveFilm

THE ILLUSION OF CHOICE

90% CONTENT
BEHIND PAYWALL

75% INCREASE
IN NUMBER OF
EU FILMS

500+ VOD
CHANNELS
EU

BOREDOM
THRESHOLD

TIME

MAINSTREAMING

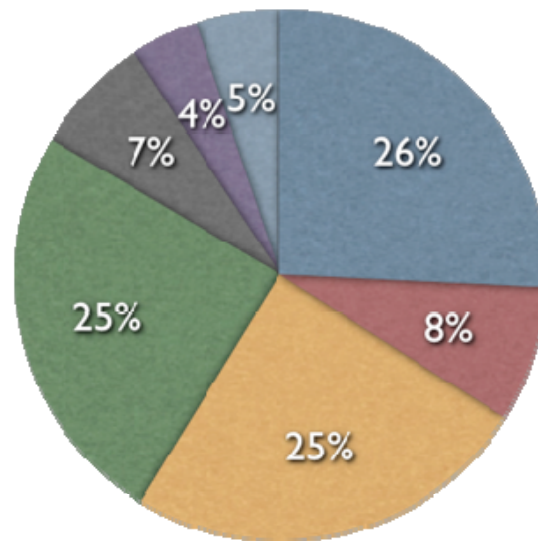
INCREASE IN
STUDIO
BUDGETS

TENDENCY TO
MONOPOLY

YOUTUBE
PREROLL
REVS FALL

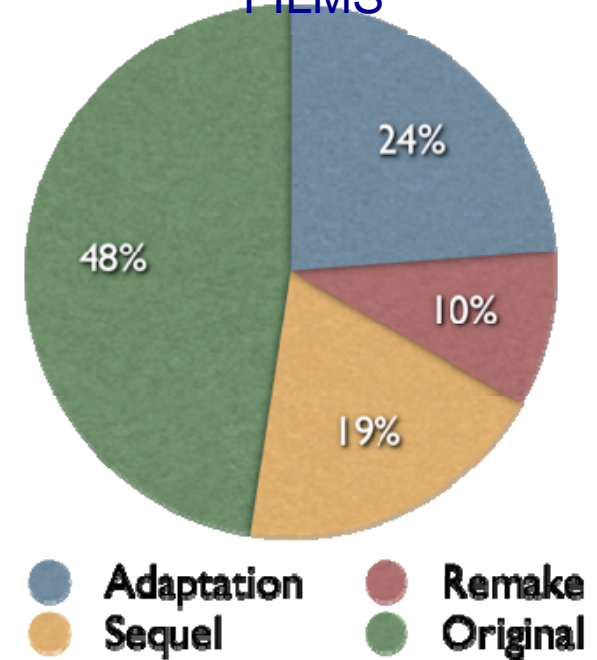
PRE-AWARENESS

- Adaptation**
- Sequel/franchise**
- Animation**
- Horror**
- Remake/re-release**
- Original**
- True story**



TOP 20 FILMS IN EU

TOP 20 EU FILMS



- Adaptation**
- Sequel**
- Remake**
- Original**

CURATORS

SnagFilr

MUBI

Picture
house

ZENTROPA



ON DEMAND

CURZON
HOME CINEMA

univers|ciné
www.universcine.com

movieurope



indieflix



EUROVOD



Sheffield
Doc/Fest

ONLINEFILMAG

NEW DISTRIBUTION

distribber
An IndieGoGo Company

SnagFilms®



Withoutabox®

createspace

indieflix



STONEHENGE PRODUCTIONS

YouTube
PARTNER

DEMOCRATIZING

BREAK THE

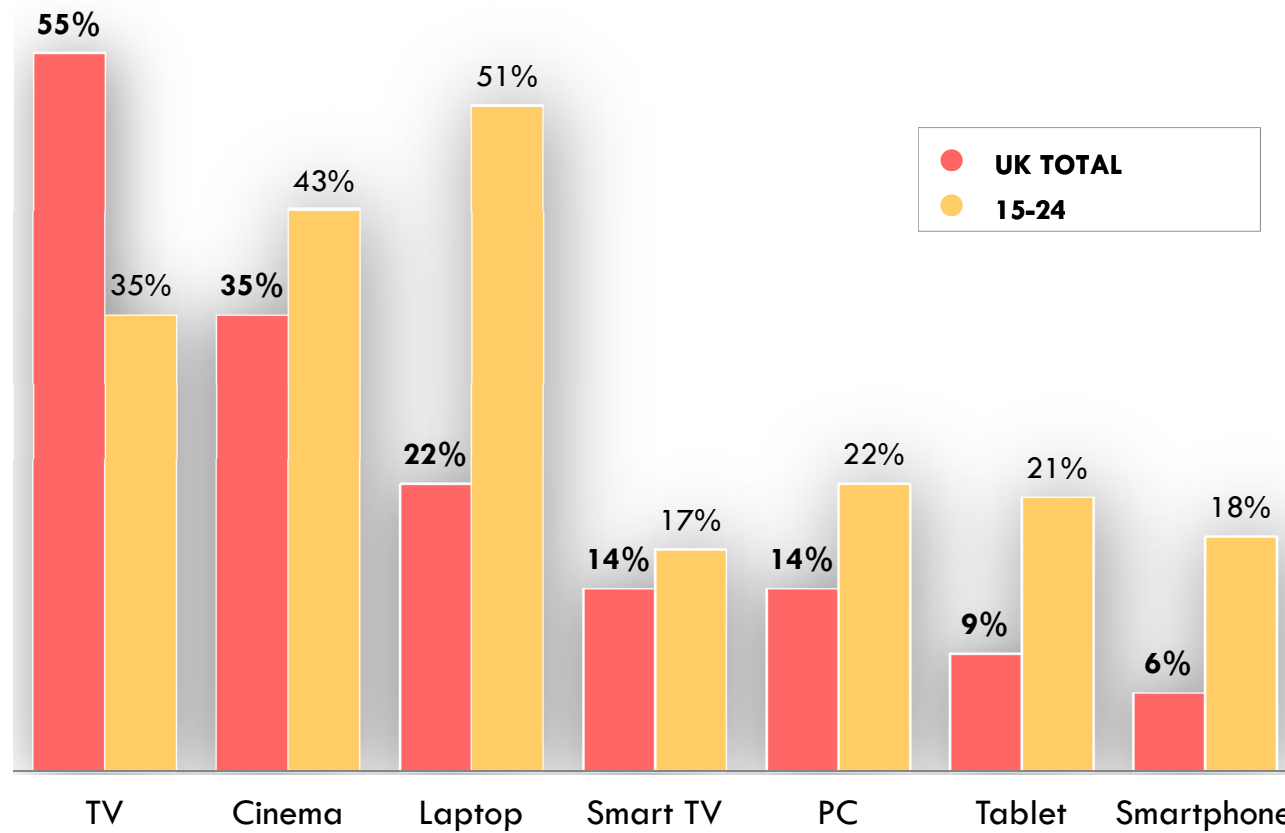
DISTRIE

distrify™



vimeo

DIGITAL DIVIDE



Source:
ICM

www.sampomedia.com

CONSUMER BEHAVIOUR

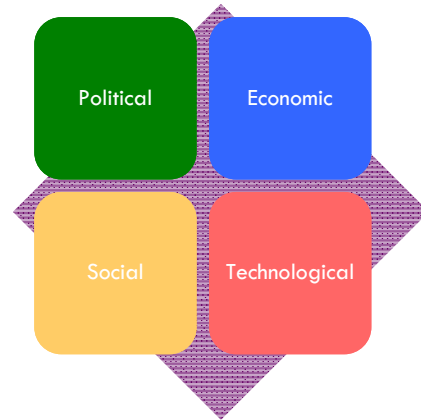
- 77% 13-16 have social media profile
- 10,000 hours and 'gameification'
- 62% teenagers use social media while watching film
- 72% multitaskers post about movies...
- 8% while viewing
- ***72 hours of content posted every minute on YouTube***



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PEST ANALYSIS



POLITICAL

Why should public support public film funds support non-film content?

ECONOMIC

Can the on-demand economics support our vision for film?

SOCIAL

What is the value of the vast increase in user generated content?

TECHNOLOGICAL

What is the potential for a dramatic increase in social screens?