

Increasing the competitiveness of the European Film and Audiovisual Industry...in small countries!

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What is Crescine?

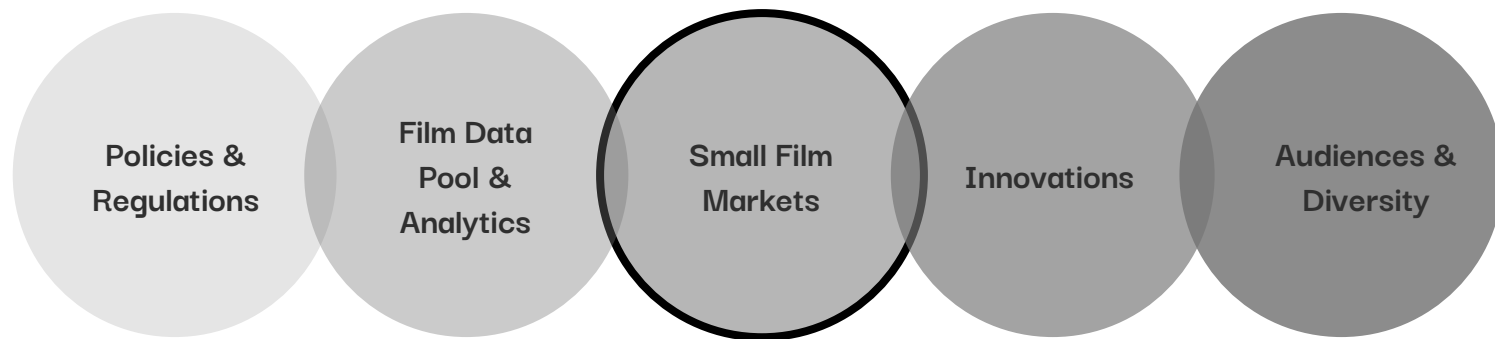
What is Crescine

An Horizon funded project dealing with increasing the future competitiveness of the European Film industry.

CRESCINE's overall objective is to enhance the competitiveness and cultural diversity of the European film industry by focusing on small markets.

This will be achieved by understanding, engaging with, empowering, and ultimately transforming European small markets through original research and piloting the results in 7 countries.

The countries within our specific scope are Estonia, Lithuania, Denmark, Ireland, Belgium (Flanders), Croatia, and Portugal.





Coordinator



Partners



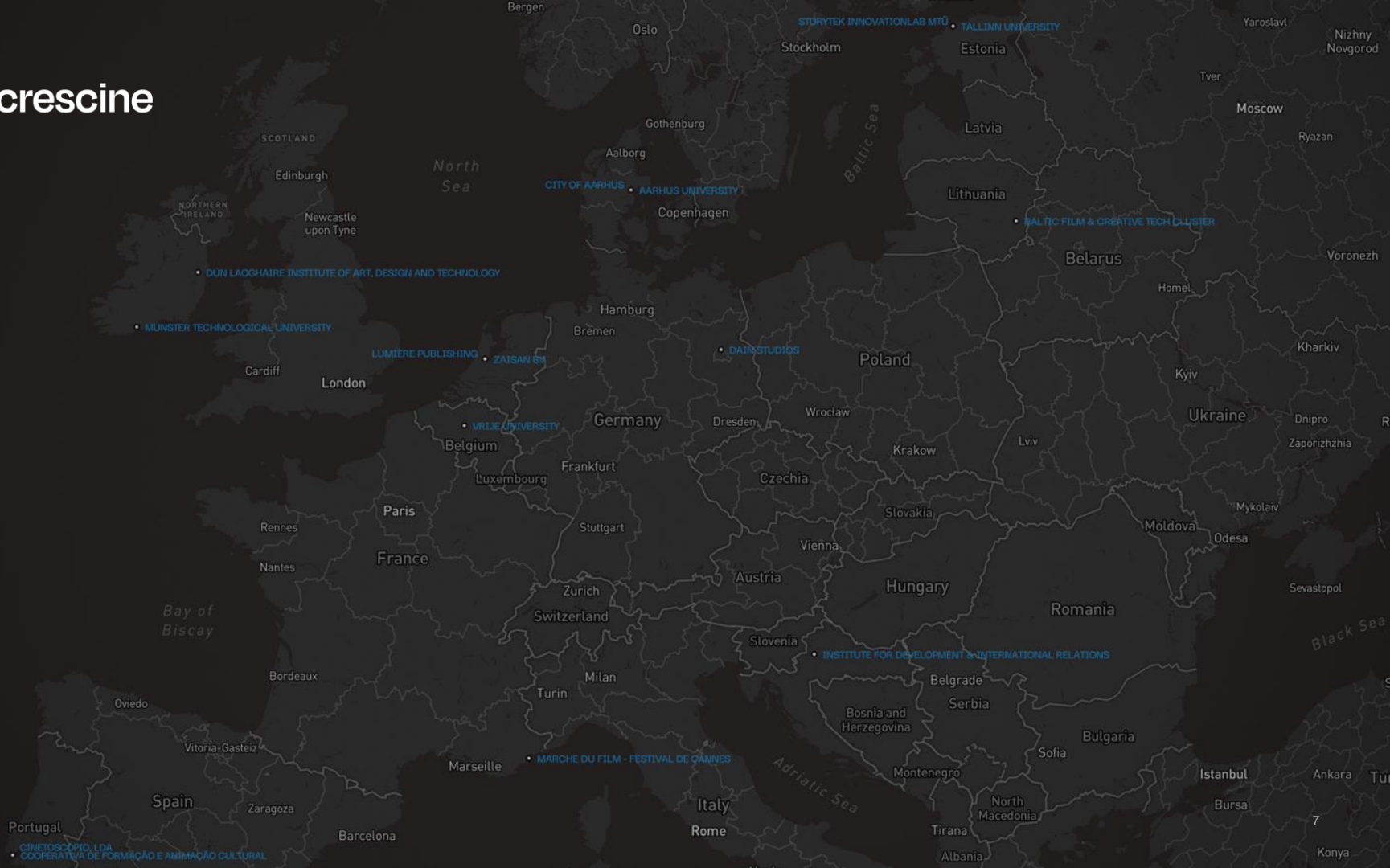
CINETOSCÓPIO

Associated Partners



The background of the slide is a black and white halftone image of an empty theater. The rows of seats are visible, receding into the distance, creating a sense of depth and solitude. The text is centered in the middle of the frame.

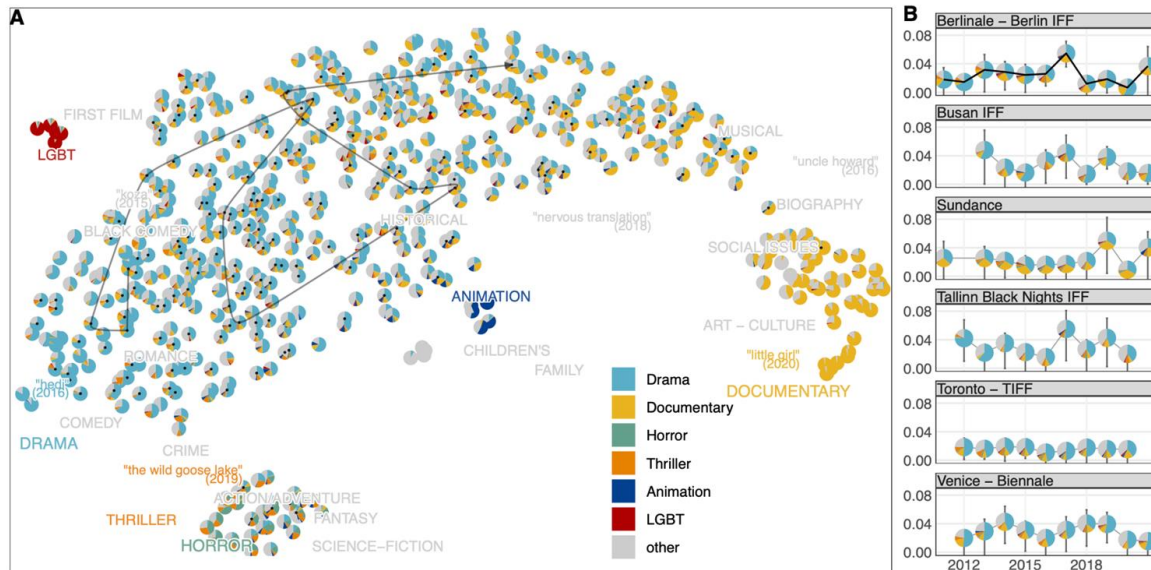
Why small markets?



• CINETOSCOPIO, LDA
• COOPERATIVA DE FORMAÇÃO E ANIMAÇÃO CULTURAL

Focus 1: Data

Working on Cinando and other databases to study festivals and market dynamics.



Cross linking public datasets

Training, skills (film schools/CILECT, etc.)

Tallinn University

Public funding measures (OLFFI)

Lusofona University

Public funding data (film funds)

DAIN Studios

Films (TMDB, IMDB, EIDR)

Festivals: Cinando, Eventival, Eventive

Market activities: Cinando

TV: broadcasters

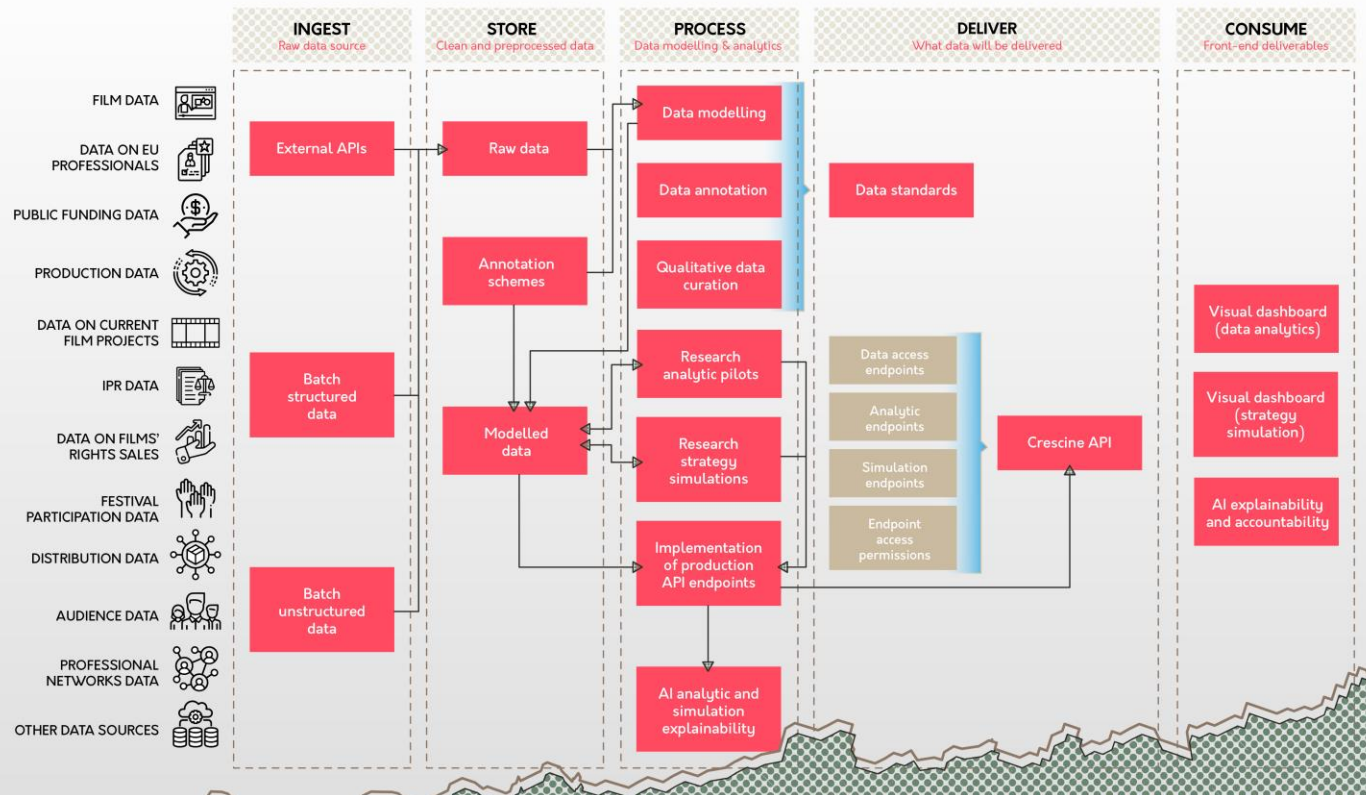
Cinemas: EAO, ticketing firms

VOD platforms: JustWatch, EAO, etc.

Reception: scraping, Letterboxd, Rotten

Tomatoes etc.

FIDA



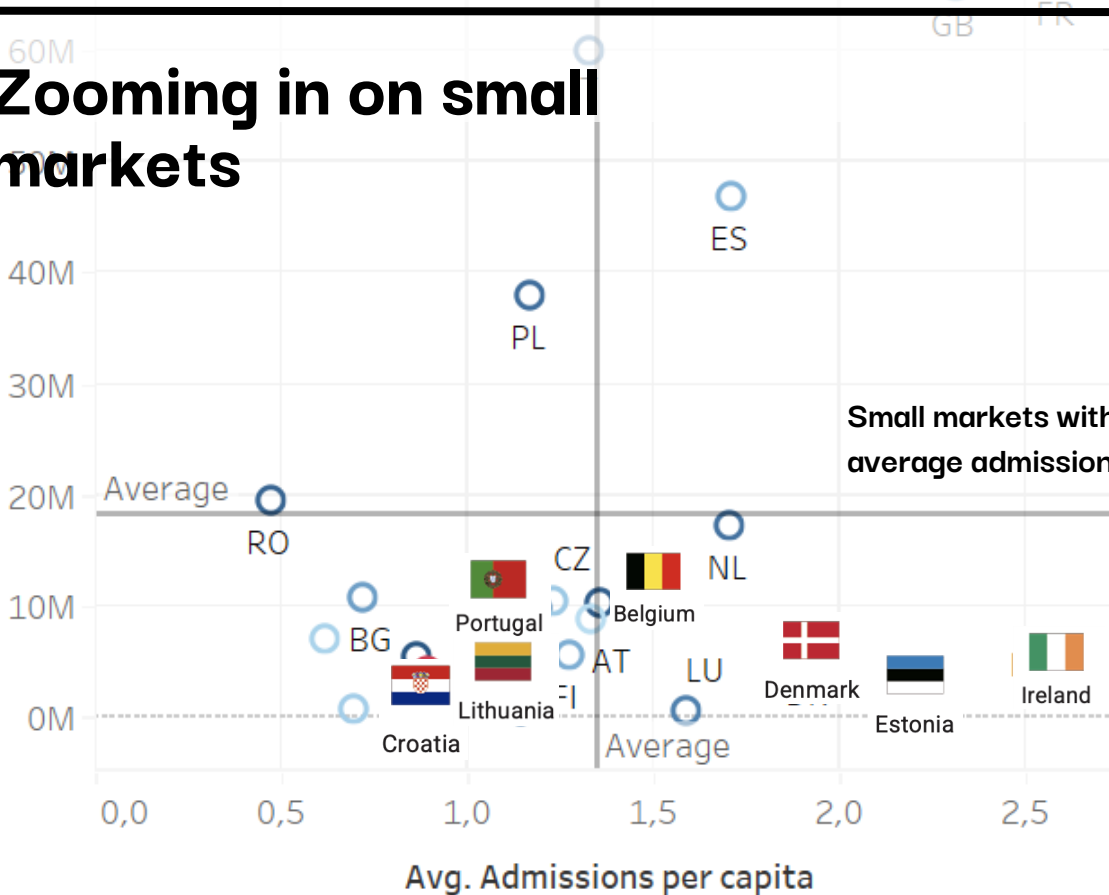
Focus 2: Comparing small markets

Zooming in on small markets

Avg. Inhabitants

Small markets with below EU average admission per capita

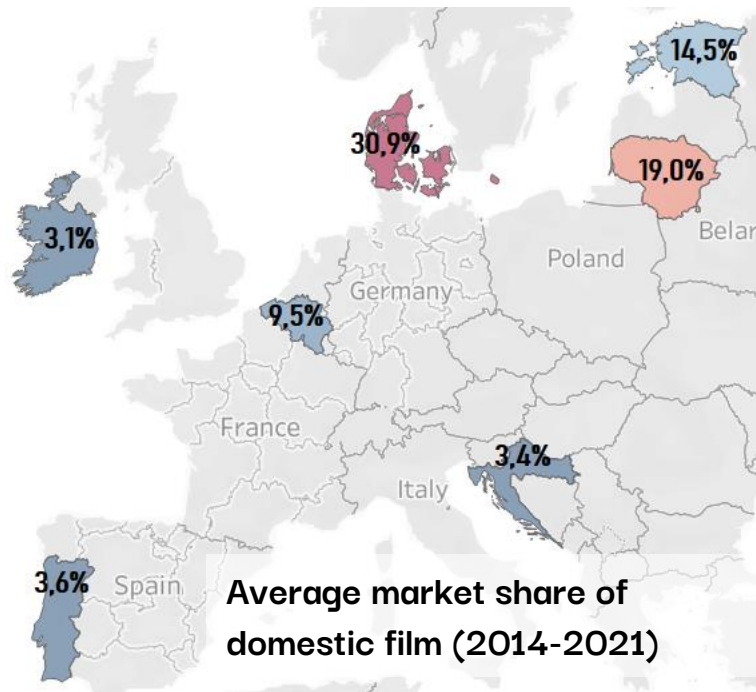
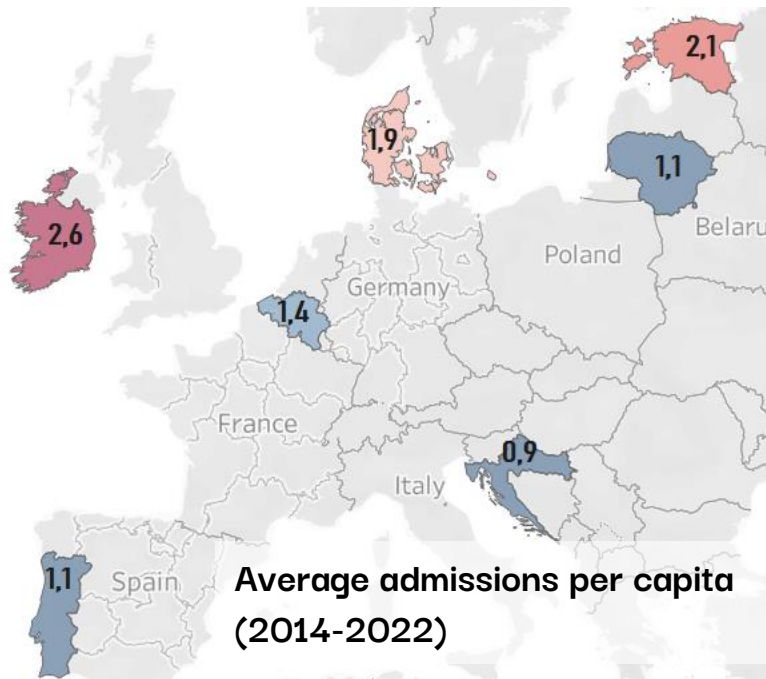
Small markets with above EU average admission per capita



Data based on EAO Yearbook FILM-ADM
 Cinema admissions (2014-2022*)
 *22: provisional numbers in Marché du
 Film Focus 2023

Exploring their differences

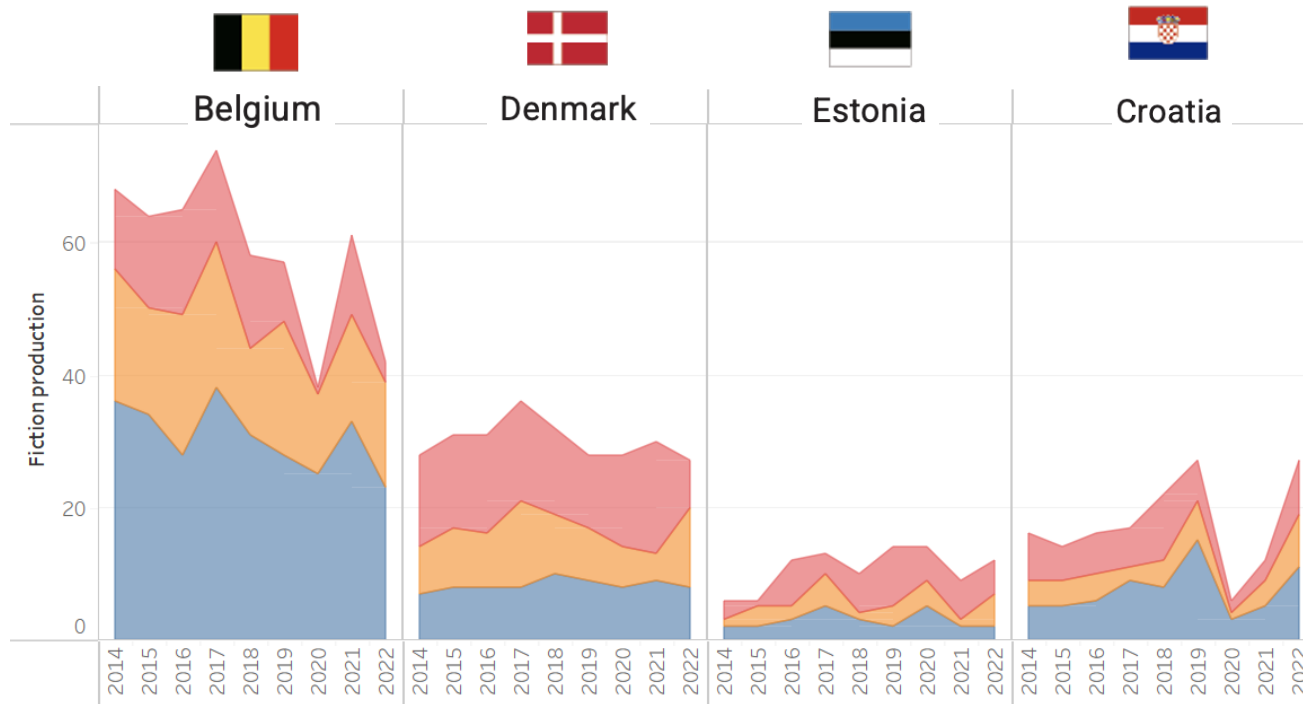
Data based on EAO Yearbook FILM-MS
Admissions market share by origin
(2014-2021)



Across time

Fiction prod

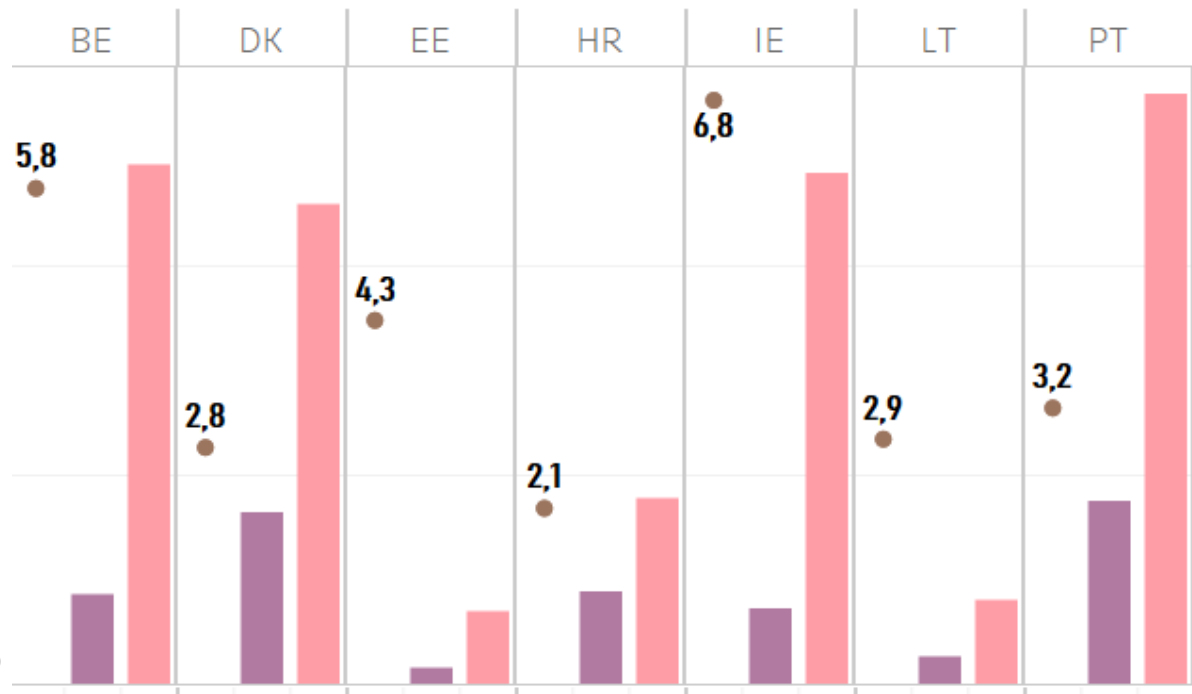
- Fiction titles 100% national
- Fiction titles majority co-pro
- Fiction titles minority co-pro



Data based on FILM-PROD Number of theatrical feature films produced (2014-2022*)

*22: provisional numbers in Marché du Film Focus 2023

Across dimensions of film culture



Average number of cinema sites vs. average number of screens + ratio sites/screens (2014-21)

Data based on EAO Yearbook FILM-INFR
Number of cinemas and screens (2014-21)

Across dimensions of film culture

Average AV revenues per capita in € (2014-21)



Data based on EAO Yearbook FILM-INFR
Number of cinemas and screens (2014-21)



Focus 3: Audiences, distribution, business

Why we need a more in-depth understanding for distribution, audiences and platforms

- Increasing potential of SVODs, but mostly benefiting scripted TV and not enough to compensate cost of film.
- Working with SVODS has instigated a series of new challenges (IP, transparency, etc.)
- Release windows reshuffled and fundamentally transformed: a shift from one size fits all strategies to new custom-made strategies
- People are slowly getting back to the theatres, but cinemagoing is shifting

Especially for small markets...

- Platforms impact small markets differently
- We still know little about the effectiveness of screen agencies distribution and promotion support strategies in small markets
- Screen agencies and policymakers are struggling in how to deal with platforms
- We're all looking at what's happening in each others' markets, but we're lacking context and we need to look at differences between small markets



Outcomes for industry, policymakers and screen agencies

- Guide for collaboration with global VOD providers
- Scenarios for increasing revenue based on more flexible windowing strategies
- Guide on strengthening the alternative distribution circuit
- Strategies for increasing the effectiveness of promotion campaign
- Best practices for industry and screen agencies on supporting audience development, distribution and promotion

Focus 4: Innovation

Green Innovation
Ip Management & Business
Changes in Digital/AI
Interventions with Co Pro Markets
Alliance Pilots
European Skills report

State of European Film Platform



**But we are small...we need others
to be bigger!**

A lot can be done...so let's pool expertise to go deeper

- **Key stakeholders:** European Audiovisual Observatory, EFAD, Europa Distribution, European Producers Club, VOD platforms, online film communities, screen agencies, film and media literacy organizations, film distributors, policymakers, etc
- **Aggregated data:** reports, databases
- **Networking – spillover effect of platforms**
- **Lessons learned** from existing practices in distribution, audience development, promotion strategies, best and worst practices can inform the future
- **Questions to steer our research:** core struggles in distribution, in working with platforms, in redefining film fund strategy...in designing a future for film and media in Europe!

Get in touch at Crescine.eu

