DIGITAL DISTRIBUTION OF DANISH DOCU-MENTARIES

DANISH FILM INSTITUTE
& DANISH PRODUCERS ASSOCIATION
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Table of contents

Executive summary

Det følger af filmaftale 2015 – 2018, at: *"Det Danske Filminstitut iværksætter i samarbejde med Producentforeningen i 2015 – 16 en analyse af dansk dokumentarfilms digitale markedspotentiale. Analysen bør omfatte det danske marked til forbrugere samt det offentlige som aftager af dokumentarfilm. Analysen bør endvidere omfatte dansk dokumentarfilms eksportpotentiale."*.

Afsættet for analysen er et fælles ønske fra Producentforeningen og Det Danske Filminstitut (DFI) om at opnå større indsigt i, hvorvidt der er et særligt digitalt marked for dokumentarfilm og om dansk dokumentarfilm i højere grad kan udnytte et eventuelt potentiale.

Analysen viser ikke et egentligt uudnyttet digitalt markedspotentiale, som vurderes at kunne forbedre økonomien i den danske dokumentarfilmbranche væsentligt på nuværende tidspunkt. Det kan ikke entydigt konkluderes, at der er nye indtægter at hente på danske og internationale markeder, som det ser ud pt. Det betyder dermed også, at dokumentarfilms økonomi i Danmark fortsat er mest velfungerende under de nuværende ordninger, hvor filmene hovedsageligt støttes af DFI og TV-stationerne. På det internationale marked er der behov for fleksibilitet, således støttevilkår og politiske aftaler ikke begrænser filmenes muligheder for at skabe og nå et internationalt publikum.

Analysen peger i stedet på en vifte af faktorer, som er væsentlige i dokumentarfilmbranchens fælles projekt med fremadrettet at udvikle et decideret marked på de digitale platforme. Analyserapporten giver branchen et fælles udgangspunkt for at diskutere vidensdeling, best practice og konkrete strategier for at bringe danske dokumentarfilm endnu videre ud på de digitale platforme samt for at drøfte om støtte-systemet i højere grad kan facilitere den proces.

Anbefalinger

Producentforeningen anbefales at:

- fortsætte arbejdet med at afsøge det danske VOD-marked og på kollektiv basis sælge kataloger af film til VOD-tjenesterne;
- indsamle viden om de store tjenesters strategier for indkøb og vurdering af film på branchens vegne.

Producenterne anbefales, at:

- arbejde kreativt med filmens vinduer;
- opbygge og fastholde viden om outreach i firmaet;
- arbejde med forskellige formater og anvende disse til at teste filmene i forhold til publikum.

DFI anbefales, at:

- yde støtte til at arbejde med både outreach og distribution;
- facilitere vidensdeling om best practice på området;
- undersøge om det nordiske samarbejde kan udnyttes bedre.

Digital distribution
Alle filmene i analysen er tilgængelige på danske VOD-platforme (Video on Demand), herunder dr.tv, TV 2 Play; VOD-tjenester, som er gratis for forbrugeren – Filmcentralen, inkl. undervisning og Filmstriben samt de kommercielle tvod-tjenester, DBC Sofarækken, Blockbuster, Danishdox.dk og SF Anytime. Antallet af visninger på platformene vurderes at være lave og hvis tv-stationernes platforme fraregnes, når ingen af filmene op over 3.000 visninger i hele filmens liv.

De gratis tjenester og tv-stationernes platforme fylder således forholdsvis meget i den digitale distribution og understreger betydningen af den distribution, som følger af finansieringen. En films succes vurderes i forhold til filmens målgruppe og målsætning, og filmens økonomiske succes samt evnen til at nå sit publikum kan ikke bedømmes ud fra VOD alene. Filmens liv i biografen, på tv, på dvd og på VOD må ses som en helhed, og dokumentarfilmens finansieringsmodel med støtte fra DFI samt en lang række danske, nordiske og internationale finansiører lægger grunden for de muligheder for VOD, der kan arbejdes med. Analysen af VOD-succeser – både økonomisk og i forhold til at nå et publikum – viser, at der er tale om lave tal på området. Ganske få dokumentarfilm kan skabe en indtjening på det rent kommercielle marked, som kan matche de 50.000 kr., som det tidligere var muligt at få for et salg til Filmcentralen Alle.

Outreach på det internationale marked fremstår imponerende, når tallet opgøres på"eye balls", men heller ikke her er det dokumenteret, at der på nuværende tidspunkt er en betydelig uudnyttet VOD indtjening, som både opvejer VOD omkostninger og arbejdstid. Der er dog anbefalet en række nye især europæiske VOD-services, hvis vilkår og potentiale bør undersøges nærmere.

Analysen har afdækket tre centrale barrierer for digitale distribution
Modellen for distribution af dokumentarfilm halter

Danske dokumentarproducenter agerer som distributører i Danmark, idet området ikke er kommercielt interessant for deciderede distributionsselskaber. Økonomien i dansk dokumentarfilm er presset, og det primære fokus for enhver producent ligger på at producere filmene.

Budgetterne til PR og marketing er lave
PR og marketingbudgetterne for filmene spænder fra 50.000 kr. til 500.000 kr., og dækker alle marketingsaktiviteter for filmene, herunder marketingkampagner, grafik og tryk, sociale mediakampagner og websites, pressearbejde og eksterne konsulenter samt i nogle tilfælde også leje af biograf, teknik og produktion af dvd'er. Markedsføringsbudgetterne, som kan henføres specifikt til VOD er markant mindre, typisk på et par procent af det samlede marketingbudget. Producenterne arbejder med outreachkampagner, strategier for publikumsengagement på de sociale medier, optimering af resultater når publikum anvender søgemaskiner, og opbygning af fællesskaber omkring filmene og deres tematikker, og aktiviteterne kan med fordel udvides og udvikles. Det kræver dog, at der afsættes et budget til dette i lanceringsfasen, og til at fastholde publikum over tid.

Data er begrænsede
Analysen har tydeliggjort, at det er vanskeligt at samle og analysere data på området. Det er ikke muligt at adskille vod-indtjening fra andre indtjeningskilder i de data, som

producenten modtager fra internationale salgsagenter. Adskillige af de store tjenester leverer ikke oplysninger om antal visninger, og på det danske marked opererer tv-stationerne med forskellige opgørelsesmetoder, som gør det vanskeligt at sammenligne på tværs. Tilsammen betyder det, at det er svært at arbejde strategisk med digital distribution og især uden standardiseret data.

På det internationale marked kan der være uudnyttede muligheder
En stor del af den internationale distribution, broadcast og VOD, følger af producentens aftaler med broadcastere, idet frasalg af VOD-rettigheder oftest er en del af aftalen. Hertil kommer salgsagenters salg til TVOD (leje) OTT-tjenester som Netflix, Google og Amazon. Der er på det internationale marked en lang række tjenester, som kan være interessante for danske dokumentarproducenter og som det kræver en særlig indsats at nå. Det har ikke kunnet dokumenteres i hvilket omfang indsatsen står mål med indtjeningen. Analysen indeholder således en omfattende oversigt over større og mindre VOD-tjenester, som kan være relevante.

Af hensyn til at øge læserfeltet samt muliggøre inddragelse af en ekstern, international konsulent, er analysen udarbejdet på engelsk.

Producentforeningen og Det Danske Filminstitut, Januar, 2017.

Summary

The Danish Film Accord 2015-2018 states that in 2015-2016 the Danish Film Institute in collaboration with the Danish Producers Association will initiate an analysis of the digital market potential for Danish documentary films. The analysis should include the Danish market for consumers and the public as acquirer of documentary films. The Analysis should also include the export potential of Danish documentary films.

The study is based on collected basic distribution data from Denmark, and interviews with all six producers of the case films:

The Act of Killing, 2012 (Final Cut for Real)
The Agreement, 2014 (Bullitt Film)
The Circus Dynasty, 2014 (Hansen & Pedersen Film og fjernsyn)
Free the Mind, 2012 (Danish Documentary)
Motley's Law, 2015 (Made in Copenhagen)
Sport Kids, 2015 (Final Cut for Real)

External consultant Cecilie Stranger-Thorsen, Nordisk Panorama, would interview the producers of the 6-8 cases, supplement with short interviews with distributors, and compile the data and analysis in a report. External consultant Wendy Bernfeld, Rights Stuff, would supplement the analysis on the international digital potential of the films selected and give general input on digital distribution. Supplementary interviews were done with Danish and international Sales agents and other producers.

The goal of the study has been to explore best practices, new opportunities and hindrances connected to utilizing VOD from a producers' perspective. It aims to highlight the support and new partnerships required for producers to take advantage of new opportunities and strengthen the sustainability of the industry.

New digital opportunities
The new opportunities available for VOD distribution include:

- New players commissioning and funding content
- New buyers of both new and older production
- New ways to reach audiences directly

Working proactively with new distribution opportunities and audiences can mean prolonging the life of a production from 2-3 year up to 10 years. Especially the SVOD market is interesting for slightly older productions, with a sweet spot from 2-6 years.

Hybrid distribution, meaning producers combine traditional distribution with carving up specific rights or activities for specific types of distribution, is necessary. Producers approach new platforms on their own, work with Sales agents and distributors, and / or work together with digital representatives and aggregators.

It's important to note that producers are facing new costs connected with the different VOD formats and financial prospects of the new players are not predictable, and it has yet to be proven as a source of real substantial income that covers both the cost involved, the work time involved and actually gives an overhead. Still, the revenues from these services are cumulative, and do add to the existing revenue streams, though at a very limited level.

Are producers utilizing the new digital opportunities?
Collecting Danish data proved complicated. The lack of demand to report numbers makes VOD data hard to find and analyze, the reason being that distributors, and thus sales agents often report income in bulk, not divided up on specific media – and even if they do report specific VOD numbers, those numbers are almost never reported in details re. which type of VOD.

The data collected show that VOD distribution in Denmark is concentrated through the DFI-initiated services Filmstriben and Filmcentralen, and as a result of the DPAs common sales initiative "One stop shop". In the Danish market, there are small possibilities for documentary producers in the private market, though some opportunities for multiple non-exclusive VOD sales seem untested for our cases in question. This is for example due to the fact that some of the films have to fulfill their obligations from the pre-buys that contributed towards the finance of the production of the film in the first place, before the rights are free to potentially be resold.

Internationally, comprehensible distribution data were unavailable. The study suggests that there is a potential for strategies that bring the films beyond the largest services (Netflix, iTunes, Amazon). To use the new potential of VOD internationally, producers are advised to work with Sales Agents to explore the possibilities of hybrid distribution, to keep close track of which rights are sold off and to follow up on the local work of distributors.

Though the films are available in several VOD services, the popularity of the films varies. It's impossible to discuss VOD distribution without looking at the marketing and outreach work drawing attention to the availability of the films, and a preliminary analysis of the marketing budgets of the films show that there are few resources available for marketing in general, in particular for specific VOD efforts or Social Media work.

There might be a potential for new partnerships in film distribution, the territory is largely unexplored. To develop new business models for film, the industry is wise to seek inspiration and partners from industries such as start-ups and game developers, especially the strict customer focus these industries adhere to. New models are needed, not only for documentaries but for all films that are not US blockbusters.

Need for innovation of the film industry's business model
Producers operate in a Limbo between the old economy and many possible new economical models, and it must be seen as highly rational for producers to concentrate on the old business models when the new are riddled with complexity and risk. Producers need more knowledge regarding international distribution, revenue models and outreach work to take advantage of new opportunities, especially hybrid distribution, allowing for a combination of traditional and new financial models.

Innovating business modes in the film industry has been a discussion of new players filling a financial gap according to old distribution models. The industry would benefit from exploring a more agile and customer focused approach to business development in addition to the traditional one e.g. collaboration with other players within marketing and distribution.

The key is for producers to keep track of which rights are sold off, and how to benefit from non-exclusive deals by selling the rights several times for each window and in each territory. The key for the support system is to ensure that traditional financing can be combined with new approaches, to build a sustainable future for Danish documentaries.

It is suggested that the catalogue of activities concluded in this study could be discussed with the producers to point out the road ahead.

1. Goal of study and methodology

Goal
The study has been carried out by The Danish Film Institute (DFI) and The Danish Producers' Association (DPA)[1], as part of the commitments in the Film Accord 2015-2018 to analyze the digital market potential for Danish documentary films. The Danish market for consumers, the public as acquirer of documentary films and the export potential of Danish documentary films should be included in the study.

Definitions and demarcations

- **Danish documentary film**
  A Danish documentary film is here defined as a documentary film with a Danish majority producer. The documentary film can be produced with or without support from the DFI. All versions / lengths will be considered: (e.g. 4x 10, 58 and 75 min. versions of the same film).

- **Digital distribution**
  With digital distribution, we here mean Video On Demand (VOD), aimed both at public and private customers. DVD and Blu-ray is not included as part of digital distribution analyzed.

- **Market**
  Market is defined both as economic market (revenue streams) and as audience (eyeballs).

Methodology
The study set out to identify 6-8 best cases to act as inspiration for other producers. From an initial selection of 20 Danish documentaries, the working group would choose the cases according to a set of variables:

- Danish majors with international potential
- Support from the DFI is not a criteria: the films can be produced without government support
- Children's & adult productions should be represented (approx. 2 films aimed at children)
- Variation in the choice of Danish producers (different knowhow and experiences)
- Variation as to international sales agents (different approaches, partners and know how)
- Ensuring the films aren't too old, yet have had time to explore their windows and market potential, films premiering after 2012 were suggested
- Minimum one case should be financed and distributed by Netflix
- Minimum one case should have performed well on YouBio (TDC)
- Minimum one case should be featured on iTunes

[1] For participants in the study, see Appendix 2.

Based on the selection done by the working group and the data submitted, Cecilie Stranger-Thorsen interviewed the producers and distributors, and compiled the data and analysis in a report. Wendy Bernfeld supplemented the analysis on the international digital potential of the films selected and gave general input on digital distribution.

The data collection and first contact with producers should start medio September, and based on the data available October 1st 2016, interviews would commence.

Notable deviations
Data submitted from the 20 contacted producers were sparse and proved hard to compare because the films have premiered at different times, thus had a different distribution life span, had different finance plans, ie different territories sold off as part of the production financing etc. The working group chose 6 varied films from the material, whereof *Sport Kids* is a children's production (documentary series):

The Act of Killing, 2012 (Final Cut for Real)
The Agreement, 2014 (Bullitt Film)
The Circus Dynasty, 2014 (Hansen & Pedersen Film og fjernsyn)
Free the Mind, 2012(Danish Documentary)
Motley's Law, 2015 (Made in Copenhagen)
Sport Kids, 2015 (Final Cut for Real)

Producers were asked to present the cases themselves, and the working group decided to supplement with interviews with two producers with different approaches: House of Real and Plus Pictures were interviewed about outreach strategies and working with new sources for financing. The working group also decided to use the production *Mercy, Mercy* (2012), as a benchmark example of a film that sold well in the private VOD-market in Denmark[2].

DFI collected key numbers for distribution in key Danish VOD-services, and producers and Sales Agents were asked to supplement with key activities, if audience numbers and revenue streams were unavailable. Presentations from 5 producers were submitted, see Appendix 1. The data for the Danish distribution were finally collected early December.

International Sales Agents Autlook and Cinephil were interviewed and supplemented with information on international VOD activities. It was difficult to access distribution data internationally, as VOD numbers are often compiled with other distribution data, and e.g. distributors like Netflix don't even share data with producers.

What is a "VOD success"?
With the strategy of identifying VOD best practices, the study has focused on searching for examples of success in VOD distribution. This raises the question of what a success is, as there are no formal success criteria for VOD distribution, as has established for a broadcast slot or theatrical release.

[2] The Producer, Fridthjof film, no longer produces documentaries, because they claim that it cannot be done on a viable commercial level, and was unable to take part of the study.

The working group established that the success of each film would have to be measured in regards to its specific goals. The financial success of a film and its ability to reach an audience is also impossible to judge from VOD alone. Theatrical, Broadcast, DVD and VOD must be seen as a whole for the film's success to be considered. The study of VOD distribution in a vacuum therefore has clear limitations.

Taking this into consideration, adding the difficulty of finding data for international distribution, the goal of the study should not be to evaluate the success of the six chosen cases. The goal is to explore the opportunities and difficulties connected with utilizing VOD from a producers' perspective, and to highlight the investments and new partnerships required to take advantage of the opportunities.

VOD terminology and strategy
Video On Demand span different types of business models and delivery means: From set top boxes via a Pay TV / Satellite operator like CanalDigital to OTT (direct to consumer without needing a subscription from an operator) such as Netflix.

Today, VOD goes beyond the 24 hour rental for 5 EURO watched on a television set. VOD is in many forms now, each a separate potential revenue stream and each when usually nonexclusive, allowing multiple deals in each ''window'' and each region and in offerings across various devices – including mobile.

The most common forms of VOD are:

TVOD	Transactional VOD (pay per view): Itunes rental, Amazon Instant, Blockbuster.
SVOD	Subscription VOD (subscription, monthly or bundles): Netflix, Amazon prime, Viaplay.
FVOD	Free VOD means giving it away for free: Filmcentralen.
AVOD	Advertising VOD is free to consumer, but rights holders get revenue from ads: YouTube, Viafree
EST / DTO	Electronic sell through / Download to own. Buying and downloading films: ITunes.

Broadcasters' catch up services usually offer a short window (14 – 30 days) where consumers can watch programmes broadcast without ads or charge, though this is a constant negotiation as VOD-rights become more important.

2. The Digital Market for documentaries

The digitalization of media production and distribution the past 20 years has radically changed the content producing industries: It has revolutionized the music industry and is threatening to demolish journalism and publishing as we know it.

Following suit, the global film industry is now subject to changes so disruptive that it's hard to keep track. In the 3-year period the films in this study have been launched (2012 – 2015), the development has escalated, with the global domination of Netflix and with an array of new players buying, commissioning and distributing content. The development is continuing as we speak: December 2016, Amazon Prime has declared an expansion to 200 markets globally, offering Netflix competition.

The many new subscription services have changed audiences' behavior and expectances. Exceedingly disloyal, audiences are less willing to pay according to the old business models. Telecoms and cable providers are forced to comply, offering flexibility with skinny bundles, and OTT-services ("Over the top", direct sales to customers). The affordability of the services also affects the revenue streams for producers, demanding increased sales to maintain returns.

Within Danish documentary production, development is happening at a slower pace. Financing is traditionally done with support from the Danish Film Institute, presales to broadcasters (that in turn opens up for support from Nordisk Film and TV Fund and Creative Europe), and possibly support from the Film Institutes of co-producers' countries – in addition to the producer's own investment. The public support system ensures stable conditions for the production of Danish films.

Often using several years to bring together financing for a film, producers are forced to sell off rights in several territories early as prebuys, to access cross-national funds. This makes it harder, sometimes impossible, to make big international sales when the film is produced, and of course interferes with larger VOD deals such as Netflix global.

New discussions of an EU Single Market might influence the way the support system and presales work. And the public support system expects producers to seek new opportunities. The Film Accord for 2015-18 between the DFI and the Ministry of Culture places the responsibility of creating new business models "within the film industry". The many new VOD channels can give audiences better access to film, and the conclusion is reasonably that revenues from VOD distribution in part will compensate decreasing income from the traditional business models. The problem is that the level of compensation that VOD can provide for the collapse of the traditional business model is extremely low. Given the low fee that the consumer pays to access a huge number of films on a VOD-service, the amount that each film can earn will be extremely limited at the moment, even if the film is present on several different services.

The Danish documentary industry has been strengthened the past 15 years. Concentrating funds have contributed to higher budgets per production, but also to increased competition. Still, the project based financing model of the film industry is fragile and render producers vulnerable, dependent on results on a project to project basis.

It is essential to the sustainability of the industry that producers are able to take advantage of new financing and distribution opportunities. To discuss producers' ability to do this, we will need to look at the possibilities of the new distribution platforms, discuss the hindrances to utilize VOD opportunities, and the support required from the support system to overcome these hindrances.

2.1 New digital opportunities

The array of new VOD platforms and buyers may seem overwhelming. Even though only a handful of VOD services are relevant to documentary producers, estimates quote 98 VOD-channels in Denmark alone, around 3.000 in Europe.

Adding to the complexity of this new landscape is the blurring between traditional players and the new: Traditional players such as Cable and Telecom are adapting by offering more flexibility for audiences (new OTT-services, their own SVODs, skinny bundles), while the formerly "new players" of Digital are moving towards exclusivity and securing all rights. The disintegrating window models and the old gatekeepers are being replaced with a new world order, with global players such as Netflix, HBO, Amazon, iTunes and Google setting the stage.

In this everchanging landscape, it's easy to miss opportunities and the market of the new players that might lie beyond these major players[3]:

New financiers
Netflix' venturing into original docs have gotten a lot of attention, with Amanda Knox as a prominent Danish example. Niche players are also commissioning and funding content, like Vivendi (France) and CuriosityStream (short documentaries).

New buyers
The niche VOD market keeps growing:

- the number of SVOD channels doubled from 2015 to 2016
- 33% of this growth is in Europe
- a third of all films on VOD are European

A 2015 prediction from Digital TV Research is that OTT revenues can reach 48,3 billion EURO by 2020, doubling in 5 years. Still, Europe is behind the US in both watching OTT services (viewing numbers and services available) as well as paying for the services, perhaps an indication of the commercial potential in Europe in the many local varieties of mainstream services, such as Filmin (Spain), Orange (France), Viasat / Viaplay (Nordic).

Even though the singular fees might be modest, the cumulative revenue streams from different platforms and successive windows could add up. A low flat fee price of

[3] See Appendix 3 for background

500EUR from a small player might not amount to much, but if there are several windows per region, and many regions then the initial VOD costs may get covered and some profit might eventually be found. These sales, however, must always be seen as part of the larger production finance and sales strategy for the film, and the smaller services should only be pursued once the bigger ones, who pay more, have been tried without success or in addition to bigger services, if those agree to be non-exclusive, which is not always the case. Further: once you've established a relationship to the buyer, future sales are quicker and self-curating and might have a potential to add up.

Additionally: there's a variety of different platforms, catering to smaller, loyal audiences. If a film resonates with a particular target group, new sources of revenues are available. Niche SVOD services platforms such as: Kids' MinBio, Manga / Anime Animax, Sci Fi and graphic novel ConTV, doc sites Curiosity Stream, Xive.tv, Yaddo, Curio, etc.

Like Chris Anderson stated in 2006, about the power of niche over mainstream (with a reference to the American Network sitcom Everybody Loves Raymond and pre-Facebook webseries/Alternaet Reality Game LonelyGirl15):

*Nobody **loves** Raymond. Everybody **likes** Raymond. But **somebody loves LonelyGirl15**.*

New ways of reaching audiences directly
Several producers offer TVOD and download of films on their own sites, through platforms such as Distrify or Vimeo.

The possibility of meeting young audiences' willingness to watch online and new formats, like Norwegian broadcaster NRKs short fiction webseries Skam, or audiences' willingness to invest in quality reporting, like Swedish The Blank Spot Project point to an increasing willingness to engage. Films can build change in new ways with communities and campaigns that capture audiences' engagement and that create impact.

Not all films have the desire or potential to become multi-platform stories or create political impact. But no films can be successfully distributed without systematic work on marketing and outreach. It's not enough to make films available. Audiences have to be made aware, motivated to pay and invited to engage for a distribution strategy to be successful.

2.2 Strategies

How should producers approach the different types of VOD? Wendy Bernfeld of Rights Stuff, advise:

Remember that VOD[4] can ripple across various consecutive windows (from pay per view, to pay per month, to free / ad supported).

[4] VOD sales are always assumed to be non-exclusive, unless stated otherwise.

TVOD customarily is on a revenue share ranging from 50/50 to 70/30 (sometimes higher depending on the service). Do multiple deals in the same region.
SVOD is by now usually more of a sweet spot for VOD revenues and audiences: it is ideally based on flat fee license (ranging from a few hundred EUR to thousands per title, per region, per platform in the region). Sometimes SVOD is offered to producers on a revenue share, which doesn't often pay off - with some exceptions (Hulu, Amazon).

AVOD should ideally be with a small flat fee plus a rev share based on CPM (cost per thousand).

Hybrid distribution is a trend that has strengthened over the last years. Starting in USA, Canada, UK, and now going through Europe, the buzzword can mean different models:

- Sometimes it means DYI alongside traditional distribution, whether by producer / staff or Sales agent / Distributors.

- Other times, Hybrid distribution means separating different kinds of rights for separate types of distribution[5].

- A third way is, rights aside, a pragmatic collaboration of the two. DYI work combined with strategic carving of rights or even just the activities, where producers / Sales Agent can work with a digital representative or aggregator to balance opportunities, playing off one offer or potential buyer from another, or working with complementary deals.

- This has a potential to combine 'traditional' and new sources of funding and to have effect, it should start in the production phase together with a strong social media / engagement strategy to support the film, through sales and post sales, helping audiences find the film. For films already out there, producers can approach new platforms alongside the usual, working together with Sales Agents, Digital representatives, or on their own.

A few interesting initiatives may serve as inspiration for Danish producers:

- The Film Collaborative's initiative "Collaborative releasing", November 2016, consists of a long list of players joining together to maximize distribution of a film: from digital distributors to producers and sales agents and social marketing / outreach experts specifically for indie documentaries. It represents a more structural approach to the prior cases of ad hoc hybrid distribution.

- Other non-US examples (where public funding and national broadcasters can sometimes be an issue) include Canadian producers Shaftesbury / Smokebomb and Omni's work with Rights Stuff, expanding to new platforms. Both producers later hired an in house junior executive to work on digital for newer productions going forward, as well as sales of catalogue to the digital sector.

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[5] See the article "Types of distribution" in Appendix 3 for more detail.

- Gravitas and MoMedia are examples of big5-aggregators that work with producers direct and with sales agents, distributors and digital experts, including in docs and indie film (Gravitas has done so in the past, MoMedia is doing it now).

3. Danish documentaries and the new opportunities

When we investigate how Danish Documentary Producers are utilizing the new opportunities, a few findings emerge:

3.1 VOD as part of the bigger picture

The most prominent finding in the study is that information about distributors, usage and revenues from VOD-distributors are so difficult to collect. This is the result of a number of difficulties, including many of the major services, like Netflix, refusing to share data.

Still, the lack of routines around reporting and analyzing results must be seen as a reflection of how new the VOD-market is and how much it is changing all the time, plus how the old routines of reporting have not yet integrated all the new types of services for separate data reporting. Were the numbers to be reported and serve as the basis of future support, more attention would be spent on collecting and reporting data. However, the level of reporting could maybe be discussed on a political level.

In VOD, the “devil is in the detail”: Which type of VOD (TVOD, SVOD, AVOD), which platform type, (online, or mobile, or telecom, cable), and which regions. Without detailed reports, it will be hard to identify gaps and for producers to build strategies for the films’ different cycles. Without the proper data, producers will continue to operate in the limbo between optimistic expectancies of VOD sales replacing traditional revenue streams, and the self-fulfilling prophecies that ‘there’s no money in VOD’. Keeping track of which rights are sold and how the different platforms perform empowers producers to take charge of distribution strategies, even though they might collaborate with Sales agents or Digital representatives to make the deals.

To strengthen VOD distribution, it’s important to collect data and to integrate goals for digital distribution and -revenues in project financing.

3.2. Resources for marketing efforts are limited

The financial reports from production and marketing of the films are of limited value when it comes to VOD distribution, as they don’t show agreements made, revenues received, or deals made after finalizing the financial work. But the reports show that the five feature films case studies are typical Danish documentaries (*Sport kids* as a shorts series for kids naturally diverge):

- They range from the classic TV-documentary to films with bigger scope and theatrical ambitions
- Budgets range from 0,5 – 1,3 million EURO
- They are produced by small independent Danish companies

- They are reliant on a combination of financing sources such as public support by the Danish Film Institute, combined with presales to (mainly) public service broadcasters both Danish and international, co-productions with producers in other countries and the sources of finance that they can access in their own countries such as public and regional funds and private foundations, and by contributions from the Nordic and Euroopean funds supporting such co-productions. Additionally, some of the productions also raise finance from private foundations in the US or internationally. Finally, producers often have to invest some funds themselves too.

The PR and marketing budgets for the films is in the range from 7.000 – 68.000 EURO, sometimes including cinema rentals and technique, production of DVDs, marketing campaigns, graphics and print, production of social media and website, external consultants and presswork etc. The money spent on pure advertising and on VOD-related activities only represent a couple of percent of the whole PR budget, even if we allow for social media and web costs to be included.

SEO and Social Media

Most internet searches for the film title bring up relevant hits (though “film” or “movie” must be included in the more generic titles). Filmcentralen for everyone is frequently featured in the top ten search results, though only Danish Documentary’s “Free the Mind” – where the producer have retained the VOD-rights – have a TVOD service featured in the top ten search results[6].

Regarding social media, the films have modest followings on Facebook (400 – 20.000 followers), some films have Twitter accounts – though Twitter is better suited for individuals (Joshua Oppenheimer and Kimberley Motley has more traction with their personal accounts). Common for all the cases is that the social media activity focuses on the launch and availability of the film.

In general, it seems the attention and momentum created by the film has not been captured and translated into a social value or a directed engagement. Attention and activities around social media peak around the launch of the film, then dwindle away. Notable exceptions are *The Act of Killing* that has kept the conversation going through the launch of the follow-up *The Look of Silence*, and also ran a 4 year campaign in Indonesia. *Motley’s Law* is also funneling engagement to Kimberley Motleys ventures (a TED talk and an attempted Kickstarter campaign).

Outreach campaigns and transmedia efforts have been given a lot of attention in the past, creating attention and engagement around projects. But in a market with increasing competition, films don’t only need campaigns, they also need basic digital marketing skills like SEO, Social Media nurturing and community building skills. Not all projects need to build their own platforms, but utilizing the internet means having the ability to identify and target niche audiences with relevant content and conversations.

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[6] Although free text searches might not be the ways the audience will find a specific film, working with SEO (Search Engine Optimization) can be quite efficient. For example, if a user is registered in the community for Danish Documentary’s new feature BUGs, your profile (albeit empty) shows up among the top hits of a vanity search, an indirect way of retaining customers.

It's impossible to expect producers to create audiences or revenues on digital platforms without proper investments in marketing efforts, including the time producers spend on distribution and marketing work.

3.3 Does Danish VOD distribution of Danish films have an untapped potential?

The numbers for the Danish distribution proved harder to collect than expected. The working group collected numbers from key services, see below:

Overview, data available for Danish distribution[7]

Broadcasters	Type	TAOK[8]	TA	TCD	FTM	ML	SK[9]	MM
DR	FVOD	3.300	1.200		16.600	10.800	8.100	
TV2	SVOD			25.893				28.788

Free to use	Type	TAOK	TA	TCD	FTM	ML	SK	MM
DFI Filmcentralen (everyone)	FVOD	-	102	850	-	-	1.320	-
DFI Filmcentralen (edu.)	SVOD[10]	2.885	232	577	583	37	956	745
DBC Filmstriben (lib.)	SVOD	40	16	12	53	5	9	1
DBC Filmstriben (home)	SVOD	22	-	-	-	-	-	629
TOTAL Free		**2.947**	**350**	**1.439**	**636**	**42**	**2.285**	**1.375**

Transactional services	Type	TAOK	TA	TCD	FTM	ML	SK	MM
DBC Sofarækken	TVOD	0	-	-	-	-	-	0
TDC-universe	TVOD	600	46	287	-	107	-	2.425
Danish Dox	TVOD	40	57	-	-	-	-	-
SF Anytime	TVOD	-	-	-	-	13	-	-
TOTAL Transactions DK		**640**	**103**	**287**	**0**	**120**	**0**	**2.425**

Estimate, total # views		**6.887**	**1.653**	**27.619**	**17.236**	**10.962**	**10.385**	**32.523**

[7] The classification of FVOD / SVOD / TVOD has been carried out by looking at the business model (capturing and distributing revenue), while the categorization (catch-up / free to use / transactional) has been carried out by looking at the user experience of the service.

Abbreviations
TAOK: *The Act of Killing*, 2012 (Final Cut for Real)
TA: *The Agreement*, 2014 (Bullitt Film)
TCD: *The Circus Dynasty*, 2014 (Hansen & Pedersen Film og fjernsyn)
FTM: *Free the Mind*, 2012(Danish Documentary)
ML: *Motley's Law*, 2015 (Made in Copenhagen)
SK: *Sport Kids*, 2015 (Final Cut for Real)
MM: *Mercy, Mercy* (Fridthjof film) is included in the table below as a benchmark example.

[8] Numbers based on the catch up of the rerun alone.

[9] Based on 4 of the 6 films (financed in DK): *Varicella*, *Chicara*, *Fægtemæsterens Søn* and *Ruth.*

[10] DFIs Filmcentralen is free to use for teachers and students, but is based on a school subscriptions. Therefore, we've classified it as a (non-commercial) SVOD-service. Likewise, DBCs services Filmstriben at the Library and home is a subscription service for libraries, allowing the public to access films with the local library's PIN code.

To estimate a total audience, we've summarized the total number of views above, but this is neither numbers that can be compared, nor used to say something about the size of the actual audience. The "total number of views" number must be seen as an indication only, as the way of calculating differ greatly from platform to platform.

Especially broadcast catch-up numbers are hard to compare, as TV2 and DR calculate them differently (DR re-calculates numbers based on households, with the same methods as for TV, and only counting the viewers who watch whole programmes). Comparing online numbers will hopefully be easier after standards for online viewing is finalized (expected January 2017).

It's clear from the numbers that Danish VOD-distribution is dominated by producers' deals with broadcasters[11], as well as two major initiatives: DFIs distribution services Filmstriben and Filmcentralen, and DPAs 'One stop shop' initiative.

3.3.1 Public as acquirer of Danish documentary films

As the data in chapter 3.3 clearly shows, DFIs services Filmstriben and Filmcentralen are the most important for distributing Danish documentaries to find a digital audience. The services are built on different terms for filmmakers and users:

Filmcentralen Educational: The DFI retains rights to educational distribution through the film support scheme. Schools buy a subscription to the service and it's free to use for teachers and students. Producers receive no revenues from the sales.

Educational material is sometimes made available on Filmcentralen. For the 6 films in this study, there is material available for *The Act of Killing*, *The Agreement* and *Free the Mind*. There seems to be no immediate connection between educational material and the popularity of the films on the service.

Filmcentralen Everyone is a FVOD service where producers get a flat fee, dependent on how old the film is. Users watch for free, without registration.

Filmstriben at the Library: The DFI retains rights to library distribution through the film support scheme. Libraries buy a subscription to the service and it's free to use for the public when visiting the library. Producers receive no revenues from the sales.

Filmstriben at the Library, from home (***Lænestolen***) is an SVOD service provided by DBC[12]. It is free to use for users (with a pin code from their local library and limited access per month – around 3 to 5 films), libraries subscribe to the service and DBC pays revenue share to producers.

In addition, DBC offers films via TVOD (***Filmstriben Sofarækken***) where end users pay and producers receive revenue share of the sale.

[11] Catch up rights are determined by the standardized contract DPA has negotiated with broadcasters.

[12] DBC is a public company, owned by Local Government Denmark and the Danish State. DBC's main task is to develop and maintain the bibliographic and IT infrastructure in the Danish libraries.

The relatively poor results from the TVOD channels available supports the producers' input from the interviews: The generous offers until 2016 from Filmcentralen Everyone, 6.700 EURO for brand new films and 3.400 EURO for slightly older films, can eliminate incentives to create similar revenue streams on their own. The three films that chose not to be distributed on Filmcentralen Everyone: *The Act of Killing*, *Free the Mind* and *Motley's Law*, seem to struggle to provide similar results on their own.

However, our benchmark example, *Mercy Mercy*, shows that there is a possibility for TVOD sales and 'going out on your own'. The broadcast success of *Mercy, Mercy* (1,1 million Danish viewers saw the film during the primary screening and the rerun) seems to be an example of the 'spill over' effect DFI reports, the effect of films doing well in theatres / broadcast trickles down to VOD. The large debate that followed the film, and a social media campaign around the launch, probably contributed to the 2.425 sales on Blockbuster, surpassing the highest flat fee of Filmcentralen (Everyone).

Considering all files and metadata are already available through the DBC Filmstriben Library Service, it is very easy for producers to offer films through DBC's Lænestolen (Library from home) and Sofarækken (TVOD). It's surprising that only *The Act of Killing* and our benchmark example *Mercy, Mercy* are available through these services, though.

The two films have been screened several times through Lænestolen, neither has been screened on Sofarækken (*Mercy, Mercy* has been available for 3 years, *The Act of Killing* for one week). As Sofarækken is a service that is relevant only if the user is not eligible to watch the film for free through the local library's subscription to Lænestolen, it's not a good measure of the commercial potential of a film.

SVOD service Lænestolen pay the producer a revenue share (though DBC considers the service to be a TVOD because of the limited hires per user), not a flat fee as this study recommended in chapter 2. The possibility of making the films available through Lænestolen and Sofarækken must be considered a low hanging fruit that producers might miss.

3.3.2 Danish market for consumers

Central for the distribution of Danish documentaries on the private services shown above is the DPAs initiative 'One Stop Shop' (OSS).

In 2012, The Danish Producers' Association made a deal with Netflix to sell a catalogue of 55 Danish documentaries for a flat fee. Later, 120 titles were presented to TDC for their SVOD and TVOD services.

2012 the TDC SVOD service closed down and the TVOD service was renamed Blockbuster. OSS is still handling single sales for producers to Blockbuster, as distributors don't want to deal with producers individually. OSS also sold a new catalogue to Netflix in 2014 and has an ambition to deliver more films in the future.

Of the six films in this study, only *Motley's Law* was sold directly to the TDC-services (The other distribution deals are made through OSS). *Motley's Law* is also the only film available at SF Anytime (together with Made in Copenhagen's *Who we were*). Both sales were carried out by Sales Agent LevelK, and proves that there is a potential for selling films to several TVOD services non-exclusively, also in Denmark.

VOD-distribution of Danish documentaries in Denmark

The six films in the study seem representative when it comes to the distribution of Danish documentaries on VOD in Denmark. If we look at SF Anytime, Viaplay, CMore and Blockbuster together, we see that the distribution of Danish documentaries is very limited.

Focusing on the DFI supported productions (with Danish majors, supported by DFI commissioners) from 2012 - 2015, we can compare the share of VOD distributed films of the total amount produced, finding that:

- SF Anytime features 8 Danish documentaries (TVOD)
- Viaplay features 0 Danish documentaries (TVOD)
- CMore features 0 Danish documentaries (SVOD)
- Blockbuster features 26 Danish documentaries (TVOD)

In the 4 year period our cases are collected from (2012 – 2015), of the approximately 120 documentary films the DFI has supported, only maximum 34 titles – estimately under a third (28%) – are currently available on VOD in Denmark in services that aren't DFIs own (The services are probably overlapping, making the titles even fewer).

The VOD-availability of these films is mostly due to the Danish Producers Association's One Stop Shop (It should be noted that the total amount of documentaries on Blockbuster in this period is 42 films from 16 producers, made available through the OSS initiative, they're just not all DFI-supported, so the Blockbuster number mentioned above is lower than the total amount available in the service).

The DFI supported documentaries include titles that aren't necessarily commercially interesting, so the 28% isn't necessarily an indication of a great missed potential. To find out if a greater selection of the films are interesting, the services must be approached with the same dedication that OSS approached Blockbuster / TDC.

At a first glance, Viaplay's profile doesn't seem an immediate fit for Danish documentaries (Their limited selection of documentaries isn't featured in the storefront, and consists mostly of international sports / history and celebrity titles). SF Anytime has a limited selection of documentaries, but is a better fit profile wise. CMore might also have a potential for carrying Danish films, based on the profile of featured documentaries.

As we can see, the "SVOD sweet spot" proposed in the international market is not immediately true for the Danish market, although there might be a potential for multiple non-exclusive TVOD sales.

It should be noted that it is impossible to draw a strict line between the Danish and the international market. The Danish market is dominated by international players, yet Netflix or iTunes wouldn't be interested in a 'DK only' deal, so approaching them immediately means an international deal. The same most likely goes for SF Anytime, CMore and Viaplay, that are services targeting the Nordic market.

With the growing market of streaming services, both the number and the usage (DFI reports a 130% increase in time spent on streaming services merely from 2012 - 2013), it's likely that both number of Danish platforms and the usage will increase. As we will see in the analysis of the international potential, producers might benefit approaching platforms beyond the major players.

3.3.3 The importance of marketing and outreach

The data clearly show that distribution is not only about making films available. Making sure Danish users are aware of the films, want to see (and possibly pay for) them, can find them and *actually* see them takes a lot of work. Marketing and outreach campaigns must be built around a film's specific goals and potential, and building strategies from early development is essential.

While development of new partnerships in distribution and financing is moving slowly, new partnerships in sales and marketing could perhaps be easier accessible and, attainable for producers with some creativity. *The Circus Dynasty* has an interesting example of new partnerships, selling 2000 DVDs through collaborating with the Circus featured in the documentary. It's easy to see how this model could be built upon with digital partnerships: If a family has spent over 150 EURO online on booking Circus tickets, adding 7 EURO for an immediate peak into the world they've just invested in is a small fee to add to the experience. Yoga-practitioners may be interested in a documentary on meditation, Amnesty International members in a film on Indonesian genocide. Some partnerships can be collaborative and offer revenue share or kickbacks, other can simply be marketing, offering a discount to add value to a partners' product.

Regarding outreach, some films have big impact goals (changing policy, impacting behavior or legislation) and need strategic campaigns, others simply wants to find an audience. Regardless: If VOD can prolong the lifespan of films, outreach efforts need to have a longer focus than just launching the film. Being part of a conversation that is bigger than the films story is the big challenge, it takes a lot of effort to remain in the mind of the audiences, and often this is difficult for producers, who also move to their next production.

As an example: Norwegian feature film documentary *Magnus* springs from a video news piece on the chess world champion Magnus Carlsen in the Norwegian tabloid VG, was sold to 56 countries before the premiere and is doing the festival circuit. It is remarkable how well the online paper keeps utilizing the film after the premiere earlier this fall: Creating discussions and engagements around AVOD excerpts, working on the new angle with the current championship, bringing interviews with the director about the topic of the film: loneliness, using the film to draw subscribers to their Prime News service, etc.

Of course, VG has a big, established platform, as opposed to producers. And the film is well timed and celebrity-centric. But the take-away is that the film is an integrated part of VGs business strategy, and part of an ongoing conversation that manages to create several levels of interest for the followers in the bigger story. The film becomes part of an ongoing cycle of chess championships that will keep it relevant for years. That is a very different kind of value proposition than offering a single film. And the idea of creating partnerships with already established media, like national newspapers could be worth exploring further for specific films.

3.3.4 Design thinking in distribution

Digitalization has forced many industries to approach product development differently. Design thinking, lean development or prototyping: customer focus and prototyping: testing the reception and interaction of products before producing, even before developing.

The Film Industry is slowly catching up, for example the newly launched Propeller-initiative of CPHDOX and European partners aims to offer filmmakers an education in new methods to meet the need for innovation of the industry's business models.

Danish producers comment that the Danish Film Institute has no innovation criteria for distribution or audience engagement in their cross-platform support schemes, and that they don't know of similar innovation support in Denmark. DFI comments in turn that there are funds for innovation in distribution, so there might be a need to communicate how the available funds can be used.

From a start-up perspective, the film industry is full of companies that start a new venture / product line every three years, and abandon it right when it starts to pay off. To address the needs for new business models, the film industry needs to not only discuss how the new sources of income can be integrated into the established distribution models, but challenge their premise and the established relationship between distribution models and financing.

The biggest effect on VOD sales would be if theatres allowed for simultaneous release of specific films, allowing producers to benefit from the momentum and attention of the premiere, of press and reviews and outreach activities. Building the same momentum years after a premiere, even for a niche audience that might be highly motivated, is difficult in a VOD service with a selective storefront.

In Norway, both filmmakers and cinemas have received innovation support for distribution of films and simultaneous release experiments (f.ex. Fellesfilm and Nettkino, the latter a rev. share collaboration with theatres that has also received EU support, and that may offer a bridge to allow earlier VOD releases while 'protecting' a 30 day theatrical window, as cinema exhibitors get a revenue share).

But producers don't have to wait for structures to change to consider how shorter formats can be used to launch a story and build interest in the story without ruining the opening window in broadcast or theatres. Working with broadcasters, online newspapers or organizations to create engagement around shorter formats or series might be a good way to build audience and momentum if part of a larger strategy.

In an experience economy, audiences are less willing to pay for content, but increasingly willing to engage around causes, products, experiences and stories. Perhaps the documentary product should be redefined to include the engagement created around the film, and the business models updated to include ways of capitalizing on this engagement.

To retain and transfer this energy of this engagement, the business strategy needs to clarify the brand the film is building: is it the topic, a cause, a third party organization, the main character, the director, the producer? *The Act of Killing* is a good example of Social media strategy supporting the project's strategy of building Joshua Oppenheimers name internationally, as he carries on the conversation on Twitter and keeps the direct connection with his fan base.

From the 2-3 year lifespan of a TV documentary, distribution and audience engagement may prolong a films life to 5-10 years. Producers consider the lifespan of the film when investing in its scope and aesthetical choices (choosing music that won't date the film), the same consideration should be made when planning distribution and outreach strategies.

3.4 Does International VOD distribution have an untapped potential?

For the international distribution it proved even harder to collect the numbers needed. Producers did not have access to comprehensible data, they were either unavailable because certain players as a policy refuse to make their numbers public, or hard to find: compiled in revenue reports for several projects or together with other forms of distribution.

The available information is presented in the producer's summaries in Appendix 1. From the activities reported, we can conclude:

- Most of the international VOD distribution happens through the broadcasters' catch-up rights, meaning the producers negotiate themselves in the presales, and Sales Agents continue this when selling to broadcasters internationally. VOD rights are included in broadcast deals, so revenues are hard to distinguish. Data on rating or shares are not always reported.

  Producers report that negotiations with broadcasters for exclusivity in the presale-phase is becoming harder, also regarding international distribution. The broadcasters clearly sees VOD as important, but they tend to believe that it should be included as part of the overall contract and thus often only agree to very small fees for this particular addition of rights.

- The VOD-sales done by Sales Agents are mostly done with major streaming services:
  - The Act of Killing was sold to Netflix US
  - Motley's Law – iTunes, Google, Amazon, National Geographic
  - Sport Kids – wants to attempt a sale to Netflix now that the DR one year holdback is over

Most of these deals are done with TVOD OTT services with revenue shares, and the few numbers available are quite low, with revenues (no comprehensible numbers available). Adding to this the cost for the producer in providing the digital file (if not negotiated otherwise), costing up to 800 EUR for the iTunes standard, for example. Without an international campaign, producers are dependent on marketing in very limited storefront of the services, and recouping the investments take a lot of sales.

- The VOD activities or sales done by local distributors are black boxed to producers, as reports are neither requested nor delivered. *The Act of Killing*'s US distributor, Drafthouse, did a good job with many parallel strategies, but comprehensive numbers are unavailable.

3.4.1 Export potential of Danish documentary film

Even a 'big' Danish documentary is most likely considered an arthouse film internationally.
What helps an international sale is if it has any (or more of) these: theatrical release, a big social following /social cause; a well-known director / main character, a relevant topic, critical acclaim; faster pacing for a younger demographic target can also help in some cases due to more millennials being online and interested in causes / documentaries.

Relying on TVOD sales, where users will recognize the title and pay a relatively high price for a single film, is a challenging model for most Danish documentaries.

Even *The Act of Killing*, with its undeniable international success, reports modest TVOD numbers[13].There were a lot of activity in the US from an active local TVOD distributor (many sites, offerings, including SVOD, TVOD marketing bundles and even BitTorrent). The other 33 international distributors of the film are doing various similar second round VOD deals, depending on when their first distribution deals run out, but it is unlikely that any of them will make a sale the size of the US Netflix one. However, it's not too late for a second wave: The SVOD sweet spot can go up for 5 years, even up to 10 in some key cases.

Digital distribution expert Wendy Bernfeld of Rights Stuff offers specific advice to producers navigating the jungle of OTT-services:

1. **TVOD** is by its nature not often a very remunerative window for docs, it is useful for promotion and visibility, usually first for current films. But it is most efficient done on multiple TVOD platforms non-exclusively, for example combining iTunes with cable / telecom deals and with niche and specialty theme services. If doing one deal, do many!

   Keeping in mind that revenues can be cumulative, some examples of TVOD services beyond the "big 5" who can have appetite for Danish docs are:
   - FilmDoo in UK/Eire (buys foreign language and art house)
   - Pantaflix (Germany) – just beginning but focused on this sector
   - VODD in France (film lovers site by definition)

[13] Comprehensible numbers are unavailable.

- TF1 vod (along with e-cinema their day and date or advance premiere window service)
- SF Anytime (Sweden)
- Pathe NL (theatrical chain with TVOD / DTO alongside)
- Wuaki (10 countries already in EU, mostly TVOD rev share but also svod in Spain and apparently considering moving into more SVOD and more regions in the new year)

There are also a number of specialized TVODs (documentaries, arthouse, foreign films) that profile and position the films well. Without costly technical specifications, producers stand a better chance of revenue shares from the get go.

2. Regarding **SVOD**, the sweet spot is for 2-6 year old films, though the life expectancy is 2-10 years. First run is occasionally a well-paid exclusive, but can usually be an exclusive, and the second run is non-exclusive. So again: If doing one non-exclusive SVOD deal, do many!

   For now, ignore Netflix and Amazon Prime. Though they like some docs with traction or visibility, especially when localizing, they by now as of 2017 tend to focus more on originals and are buying less in bulk back catalogue.

   Going beyond Netflix and Amazon, do many deals when possible. And remember, revenues are cumulative, and the same film can be sold various times per window and per region. Various SVODs are now buying foreign language, art house, festival and doc films, for example:
   - Many traditional Telecom/cable companies or traditional Pay TV networks have set up their own SVOD services, sometimes under a different name:
     - Showmax (from MNET-group), Africa
     - Telenet (Yelo), Belgium (recently also funding series locally)
     - Orange, France / Spain / CEE
     - Telefonica,(Movistar) Spain (recently also funding)
     - KPN Play (Telecom), The Netherlands (recently also funding series locally)
     - OneNet, Poland
     - Liberty Global (MyPrime and Ziggo / ZiggoPlus), The Netherlands

   - Some other Medium (or select smaller) sized SVOD services outside mainstream or specializing in art house, festival and documentary:
     - Filmin, Spain and other latin regions
     - FilmOTV, France
     - Flimmit, Austria (flat fee, welcomes international festival films)
     - Icflix, Middle East and expanding, also sometimes selectively funding Docs and Features (first locally)
     - Fandor, USA (No flat fee but well curated SVOD revenue share)
     - Indieflix, USA (smaller)

- Doc-specific platforms include:
  - Curiosity Stream in USA (Educational / science, (like former Discovery channel/NatGeo style), no foreign language yet)
  - Xive.tv (more Human Interested Docs, series, eg paranormal, war, personalities(Bio) limited foreign language).
  - Yaddo just launched at IDFA, curates some older docs selectively (pays flat fee)

  Yaddo, by Nick Fraser (former BBC Storyville) also commissions new productions, by commissioning series originals (5 x 5'). The series becomes a pilot / springboard for network interest and split revenues with producers, an example of the many new business models that will continue to emerge.

  Local or EU focused basic TV channels / SVOD's:
  - Eurocinema (First in the US, now going global by being featured on Amazon OTT box) buy EU films and pay a modest flat fee
  - Filmbox live (SPII international channels) – limited appetite for docs
  - Canal+ & CanalPlay (covers various regions beyond Fr to SP, Africa, Canada too)
  - Vivendi (who owns Canal+) started Studio+, which commissions originals with other European partners – 10x10min episodes for mobile (can play as a feature). Mostly series, but recently commissioned docs (Fan1/2- on esport topic)

- General interest mainstream Pay TV / SVOD players who also buy some ''foreign'' and ''doc'' complementary:
  - France Television and TF1 apparently starting SVOD shortly
  - HBO EU Is now consolidated for all EU – however docs commissioning activity is currently more out of central Europe at this moment
  - MTG / Viaplay in the Nordic countries and CEE- premium pay, also SVOD, TVOD, DTO, and AVOD: they have begun commissioning too (series – keanue reeves, and family series- not yet docs)
  - Maxdome Germany (some limited docs, foreign ok, but higher end)
  - Wuaki (SVOD in Spain, TVOD elsewhere. Require theatrical release)

A general rule of thumb is to demand flat fee with SVOD, with some exceptions like Hulu, offering revenue share, but generally good money. Hulu has next to no foreign language documentaries, so the opportunity is more in co-producing or finishing funds, as platforms are expected to reach out to internationalize and localize.

Virtually all but the biggest SVOD OTT services will allow pitches directly, from producers or from distributor / sales agent / other representative. Although it can take a while to hear back, it's not very time consuming to try. A well written cover letter and an excel overview of main points (see example in Appendix 4) on email can open discussions - especially if one pre-curates for the platform – highlighting films that suit that platform particularly. The Excel list can put the key points forward without buyers needing to be online.

Price ranges (ignoring big films like *The Act of Killing* and Netflix / Amazon price levels) for older library nonexclusive doc features – are obviously confidential but in general terms can range from 500 to several thousand EUR per film, per platform, and per region. Higher end films, which are more recognizable and acclaimed gets the higher figures of 5 - 100K, can be 10 - 50k in USA alone.

It is so varied, depending on the film but also the timing – the degree of competition between the platforms who are either competing or counterprogramming against the big5, (complementary services). On the plus side, unless the film is rejected because it is not liked for that platform at all, sometimes it is rejected only for timing (f.ex. that genre is full up) so one can circle back next market or a year later to revisit).

A few years ago one couldn't give documentaries away, now they are hotly demanded, and a few years ago foreign language films were not desired, now that is opening up more in late 2016 / 2017 especially with Amazon moving globally as well.

It takes work to establish relationships, but once you start engaging, and do a deal, then you have a relationship directly to a buyer for all future sales (future pipeline). This fee is per deal, per region, so it looks small but it adds up.

Of the 3000+ VOD channels in Europe, Middle East and Africa alone, there's probably only 100 worth talking about as credible, financially remunerative buyers – and from that maybe 25 - 50 interested in documentaries. Perhaps fewer are interested in paying a flat fee for foreign language docs.

3. In **AVOD** there are only a few players in EU who have AVOD for a small flat fee upfront and then rev share of ad revenue.

   However they are interesting if you're putting films up on YouTube anyway or free viewing, YouTube has great visibility but poor returns, and is non-exclusive. For older or lesser known films, screening the film on a good ADVOD service sometimes leads to increased EST / DTO sales (Vimeo or iTunes etc.), as the user wants to buy it for keeps.

The Act of Killing as an example would do well on Tubi.tv (which is only revenue share but like Hulu pays very high returns in practice). However Tubi.tv has more mainstream taste, so won't have huge appetite for docs, more selective high profile ones. Generally they don't buy foreign language films or documentaries, but for really high profile stuff like *The Act of Killing*, it could be a good placement to try indeed, after the SVOD windows are over.

Specific suggestions to the six cases:
The six films in the study could be interesting to most of the arthouse and documentary film services mentioned above. In addition, there's some film specific or other platforms that producers might try on their own or in collaboration with a Sales Agent:

The Act of Killing is infinitely salable in TVOD / SVOD and ADVOD. The Netflix / Amazon Prime deals in the US only covered the US, not global, and are exclusive, still TVOD should be allowed at least with European counterparts: Telecoms, Cable and thematic sites (arthouse and docs), as well as local competitors to Netflix and Amazon would be interested, depending on the sales and activities made in the 35 countries. Netflix in non-US territories is of course an option too, once previous rights deals run out.

The Agreement could be interesting for the documentary services that focus on war and history (e.g. Curiosity stream, XiVE), though they are reluctant to buy foreign language and slower paced films. Consider also the premium pay channels with SVOD sites, such as HBO CEE, Orange, (who operates in CEE too), A&E, C+. In Central & Easter Europe, there are also regional SVODs, such as Voyo, Croatian Telecom, Serbia Telecom, OneNet Poland, etc.

The Circus Dynasty could be interesting for TV, Pay TV and SVOD platforms that focus on or programme the Performing Arts, e.g. SkyArts, NFB, Bravo, Classic Arts Showcase, and ClassicalTV. Also in terms of pitching, consider other TV channels that has programmed documentaries on circus life in past, to reference in the sales pitch, e.g. NatGeo, PBS, CBC.

Free the Mind is extremely saleable in all the VODs (TVOD, SVOD, ADVOD) right now. Rich Davidson with his almost 1M views on youtube is seriously well known Google tech talk personality, so at very least should be on Google VODs, but that should be supplemented with SVOD: Beginning of course with Netflix, Amazon and Hulu, but don't forget documentary specific (science, education, tech) services like Curiosity Stream, XiTV, A&E, ITV, Sky, Yaddo.

It's a strong film for SVOD buyers. Besides Netflix, Amazon and Hulu (who should be interested, if the film's not considered too old), services to be approached could include: Curiosity stream (science, tech), XiVE (bios, holistic, science), and of course A&E networks, ITV / CURIO and possibly even Sky, HBO, C+ and Yaddo. Additionally, regular TV types as well as their VODs might be interested: BBC, TV Ontario (Educational in Canalda), National Film Board Canada (TVOD, Discovery and Gaigam (Thematic svod's).

Motley's Law should be considered for IcFlix (Middle East) and iflix (Philippines / Asia), possibly Youku (svod/advod china). Since it was sold exclusively for the world for NatGeo, producer should check if that precludes TVOD (It should not normally).

Sport Kids spans Japan, Russia, South Africa and Scandinavia thematically, so all those "region specific'' sites can be pitched. Also aim for the kids specific sites / channels, e.g. Nickelodeon Jr. (that has a Kids Sports program already) and European equivalents.

Also TVO, NFB, educational channels and sites/market. Even HBO has a *Trophy Kids* program, and even though Sport Kids doesn't fit with the mainstream channel profile, perhaps the growing OTT offering will make HBO consider the series for complementary programming.

All the productions should optimize SEO and draw on and drive social media following to tell viewers where to find the film. Especially with the revenue share model of TVOD, it's in the producers' interest to drive viewers to the platforms.

4. Overcoming hindrances to utilize VOD potential

The new distribution opportunities might seem like a plug and play new revenue stream for film producers. In reality, this study has revealed several hindrances for producers taking advantage of them:

- As we've seen, the opportunities we point to here are new and unestablished. The producers operate in a Limbo between the old economy and many possible new economies, which must be combined, since the key financiers are still the established players. It may be considered highly rational for producers to concentrate on the old business models when the new are riddled with complexity and risk.

- In the interviews, producers stress the need for more knowledge regarding international distribution, revenue models and outreach work to take advantage of new opportunities.

- Innovating business modes in the film industry has been a discussion of new players filling in the gaps in a financing model built on old distribution models. The industry could benefit from a more agile and customer focused approach to business development and audience engagement. However, the basic problem of the consumer model, even when it is utilized through several platforms, creating too little income per film to sustain production is still a major problem.

The key is for individual producers to keep track of which rights are sold off, and how to benefit from non-exclusive deals by selling the rights several times for each window and in each territory. The key for the support system is to ensure that traditional financing can be combined with new approaches, to build a sustainable future for Danish documentaries. However, producers must also think out of the box in order to create new additional finance generating models for film production, so Denmark can continue to be a world leading film production country in the future. We have the talent, the knowhow, the skills, a well-functioning support system and strong broadcasters. But the VOD technology and the changes in consumer behavior that this system has brought about is a challenge on the level of the challenges already being faced by the music and publishing industries.

4.1 Support for producers to innovate

As we've described in this study, the era of stability of film formats, financing models and distribution models is over, and the opportunities described in this report with patchwork distribution and financing, demand new ways of working and new investments from producers, with uncertain returns.

Support schemes must mirror the dynamic development of the industry itself, with flexibility and agility. Pilot projects on simultaneous releases, new partnerships and sales initiatives may support industry's endeavors.

4.2 More resources for distribution and marketing work

Danish documentary producers have been forced to act as distributors in Denmark, as there were no one else to do the job. With the distribution efforts needed to bring the films to an audience, support to outreach and marketing efforts must be strengthened, including the producers’ own distribution work.

The DFI today supports outreach campaigns towards the national market. Any campaign internationally depends on the producers’ own investment. Without considerable support and investments in marketing efforts, Danish documentaries can’t be expected to reach a digital audience.

4.3 More knowledge about international distribution

The potential income from new services is still unknown to producers, who would like more knowledge on how to work with international sales and who to work with. How can producers ensure that Sales Agents have access to both traditional decision makers as well as new platforms? What questions are essential to ask a Sales Agent when discussing strategies?

Keeping control of the VOD-rights (to build own distribution systems, communities or target the educational market) is a long term strategy, but it is hard to measure both immediate rewards and future possibilities.

Funding pilot projects to explore and share results from hybrid distribution or new platforms could contribute to shared knowledge.

4.4 New outreach roles and partners

Producers want more knowledge of best practice in regards to distribution platforms and outreach. External consultants are often used to campaign, few producers have the resources to invest in building these competences and connecting them to long term business development.

In the field of Transmedia, the importance of the Producers Guild establishing a credit for “Transmedia producer” in 2010 is often mentioned as an important step in defining the new role. Clarifying roles and functions of an outreach producer or an impact producer, and the different roles and activities needed for operative outreach work might be helpful for producers in hiring experts as well as in building in house expertise.

4.5 Suggested activities

How can producers' ability to utilize the new opportunities be strengthened?

After the initial interviews, this report has been finalized with little opportunity for feedback from producers, because of the time pressure. To ensure engagement in the conclusions and further activities, it's suggested that a seminar be held to discuss the findings and the activities producers themselves find most relevant, preferably combined with one of the activities suggested below, like an introduction to new platforms internationally.

The following list of activities is meant as an inspiration for the further discussions:

The Danish Film Institute

Support schemes

Investigate how criteria for VOD strategies and reporting in the support scheme may strengthen focus on VOD results.

Consider strengthening financial support to specific distribution and outreach functions in productions.

Allow further inclusion of outreach costs in production budgets

Investigate the possibility of pilot support to producers with innovative projects within e.g. hybrid distribution, outreach or new partnerships.

Danish Film Institute could discuss strengthening internal working procedures when supporting both national and international launch of the same documentary film.

Best practice

Hold seminars on new opportunities: who else is out there, buying or funding, how to reach them, deal models, creative windowing, audience engagement etc.

Network and collaboration

Can the existing Nordic collaboration be used as a stepping stone to brand or sell content?

Explore collaboration on innovation funding together with private funds and stakeholders.

Producers

Strategy

Clarify distribution goals for the project from the start. How long is the film expected to live? How will that affect the development and the budget? How will the different long tail revenue streams help recoup that investment?

Strengthen sales

Consider creative ‘’windowing’’ where it suits the film: a shorter theatrical window or premiering online - building audiences and promotion before going theatrical.

Interview your Sales Agent about what they’re doing in digital. Are they doing TVOD? SVOD? Only the major players or do they ‘’go beyond’’ and to telecom, cable, OTT?

If Sales Agent isn’t interested, consider working with an agent or approaching platforms yourself. You’ll own the pipeline for the future.

Review your back catalog and see if films that are 3-10 years old have a potential for packaging. Join with other producers / distributors / reps if you don’t have enough volume – so you can group by theme, female director, best Danish, topics etc.

Produce and update a list of availabilities see Appendix 4 for an example, to allow buyers an overview of the main points.

If a rights holder is not exploiting the rights, can you cut them in on new deals instead of accepting their “no”.

Strengthen outreach and audience engagement

Plan a variety of formats from the start, use them to test and build audiences during development or to ‘remake’ your feature into a series, web series, cross platform.

Build knowledge about outreach in house. Build campaigns beyond the launch of your film and make sure you stay relevant to audiences by focusing on larger topics and conversations.

Hire interns that don’t go to Film School, but rather from Marketing or Business.

Make a daily social media routine part of every employee’s job description.

Ensure ownership of the channels where audience are engaged, and make customer retention strategies to build on their engagement.

Meet with people from the games industry or the start-up scene for new inspiration.

Producers' Association

Prioritizing new platforms

Continue acting as a testbed for Danish VOD distribution, testing out distribution deals with multiple platforms.

Create a database like the Canadian Media Production Association's[14], to create an overview of new platforms, with their focus, (frequently shifting) appetites and tastes, their windows and their deal terms, as well as their performance.

Contacting major players like Amazon and Netflix about their commissioning strategies for documentaries, and HBO Europe for discussions of their expected strategy.

Contact the French producer's association and study their own VOD initiative for inspiration.

Do a collective check of the 25 VOD-services relevant to documentaries in order to check - do they actually deal with producers directly or only with sales agents or aggregators, who is the relevant contact person, what are their reach geographically, what are their terms, what are their audiences, so that all producers don't have to contact each one of these services individually.

New roles and networks

Help clarify the new roles in outreach and marketing work, so producers know the difference between an "impact producer" and a "branding expert".

Host network meetings / masterclasses with a wide range of industries, with cases on hybrid distribution, outreach, search engine optimization etc.

[14] http://cmpa.ca/business-affairs-production-tools/digital-sales-database

Appendix 1 – Producers summaries, cases

The Act of Killing

Producer: Final Cut for Real
Sales Agent: Cinephil

Producer's summary

The Act of Killing was produced by Final Cut for Real in Denmark. The co-production companies were Piraya Film, Norway and Novaya Zemlya, UK - in association with André Singer, Spring Films Ltd, UK. The production period was from 2005 to 2012. Final Cut for Real came on board in 2007. The total cost of the film was 1.410.135 EURO

PRESALES DURING THE PRODUCTION PHASE
The film was financed with presales to the following territories:
Denmark (DR K), Sweden (SVT), Norway (NRK), Finland (YLE), Poland (Against Gravity, all rights deal), Holland (VPRO) & Germany and France (ZDF Arte). ZDF Arte contributed 8 % to the budget. DR less than 2 % and most other broadcasters less than 1% each.

Besides the prebuys the film was produced with the support of: The DFI, Danida, NFI, Fritt Ord, Stavanger Kommune, AHRC UK, Westminster University, Media Development, Media Broadcast, Kudos Family, Stiftelsen Matriark, international foundations and Nordic Film and TV Fund.

The VOD parts of the contracts were like this:
All deals started on the 1st of October 2013 (after Oscar holdback negotiations)
Denmark – No VOD,
Norway – 3 years, 30 day streaming after each run, 6 runs plus re-run within 36 hours.
Sweden – 3 years, 6 transmissions including streaming, but only exclusive for 30 days after each broadcast.
Finland – 7 years, 6 transmissions, includes VOD, but only exclusive 30 days after each broadcast.
Holland – 1/3/2013 – 28/2/1018 these are the dates for Delicatessen. For VPRO, 4 years, 4 runs, non-exclusive VOD.
Poland – - 1/4/2012 – 31/3/2017, all rights deal
German/France – TV-rights in Germany/France and German and French speaking areas of Europe, includes exclusive VOD 7 days after the first broadcast.

SALES AGENT
Before the world premiere we got Cinephil on board as the sales agent.

Cinephil (Philippa Kowarsky)
18 Levontin Street
Tel Aviv 65112, Israel
Tel: +972 3 566 4129
E: info(at)cinephil.co.il
www.cinephil.co.il

Before we released the film we made a strategy together with Philippa Kowarsky from Cinephil for the release of the film. Our list of priorities was the following:

1. Create the widest possible debate globally and especially in Indonesia through the release of the film theatrically wherever possible. (Because films that are released theatrically are often reviewed and written about in general in the press – and international attention for the film would raise interest in Indonesia). It was important for us that the debate in Indonesia would be as peaceful as possible.
2. Establish the director on the world film map.
3. Get an income from distribution, and hopefully cover our over cost on the production as well as our distribution costs and maybe even make an overhead.

World premiere and launch

The Act of Killing premiered at Telluride and Toronto in August/September 2012. In the autumn of 2012 it was released in Indonesia and Denmark only, because the European premiere was promised to the Berlinale in February 2013. After the Berlinale the film was free to go on all festivals. So far it has been screened at more than 200 festivals and won 62 awards including a European Film Award, a BAFTA for Best Documentary and an Asia Pacific Screen Award and 15 nominations including an Oscar nomination, an extra BAFTA nomination for Best Foreign Film and an Independent Spirit nomination (see list attached).

National premiere

In Denmark the film premiered as opening film for Cph Dox on the 30th of October. It was also a Dox Bio film (7th of November) and part of the festival and continued in the cinemas awards. It sold 6485 tickets in Denmark. The last Danish cinema day was the 2nd of January 2013 at VesterVovVov. There were 309 articles about the film in the Danish press between the 1st of August 2012 and the 3rd of May 2013. The film was screened on DR K in the winter of 2013. It was available on filmstriben.dk the day after the DR K screening. It could not be broadcast before because of the need to qualify the film for the Oscars.

The film has been sold to 34 territories including the US. The US distributor was Drafthouse. The US premiere was in July 2013, and at that time the Academy demanded a 60 day holdback from broadcast anywhere in the world after the first cinema release in the US.

Indonesian release

The Act of Killing has not been released theatrically in Indonesia (due to censorship and security concerns) but was made available for free for Indonesians first through DVDs and screenings and later through download. The film had a closed premiere in Jakarta first plus several closed press screenings leading up to this premiere. It became more widely accessible on International Human Rights Day in 2012, when 50 public screenings of the film were held in 30 cities across the nation. In October of 2012, *Tempo*, one of Indonesia's leading news magazines, published a special section on the 1965-66 killings, with testimony from the perpetrators. As of February 2013 more than 600 new press articles related to the genocide had been published in Indonesia.

DISTRIBUTION

All potential distributors for major territories were interviewed by Philippa Kowarsky, Joshua Oppenheimer and Signe Byrge Sørensen before they were selected and contracts were signed. The deals were typically all rights deals for each territory including both cinema, TV, DVD and VOD. These deals are often with an MG, and with a list of percentages for shares of future income on various media types. Where ever possible Cinephil negotiated bonuses and non-cross collaterisation.

DISTRIBUTORS:
US - Contact Drafthouse
France - Contact ZED
Canada - Contact FilmsWeLike
Netherlands - Contact Cinema Delicatessen
Poland - Contact Against Gravity
Australia / New Zealand - Contact Madman Entertainment
Norway - Contact Kudos Family
United Kingdom - Contact Dogwoof
Serbia/Montenegro/Croatia/Slovenia - Contact Tricon Ltd
Lithuania - Contact Grazina Arlickaite
Italy - Contact I Wonder Srl
Iceland - Contact Bio Paradis
Singapore - Contact the Indie Entertainment Company
Germany - Contact Wolf/Neue Visionen
Spain - Contact Avalon
Switzerland - Contact Aardvark Film Emporium
Portugal - Contact Alambique
Japan - Contact Transformer
China - Contact DDDream
Romania - Contact One World
Hong Kong – Edko Films
South Korea – Atnine
Malta – KRS
Tricon – Serbia
Taiwan – Maison Notion
Thailand – Movies Matter
Mars Cinema – Turkey

THE VOD SALES FOR THE VARIOUS TERRITORIES
US - Contact Drafthouse
France - Contact ZED
Canada - Contact FilmsWeLike
Netherlands - Contact Cinema Delicatessen
Poland - Contact Against Gravity
Australia / New Zealand - Contact Madman Entertainment
Norway - Contact Kudos Family
United Kingdom - Contact Dogwoof
Serbia/Montenegro/Croatia/Slovenia
Lithuania - Contact Grazina Arlickaite
Italy - Contact I Wonder Srl
Iceland - Contact Bio Paradis
Singapore - Contact the Indie Entertainment Company
Germany - Contact Koch Media
Spain - Contact Avalon
Switzerland –Contact Cinelux
Portugal - Contact Alambique
Japan - Contact Transformer
China - Contact DDDream
Romania - Contact One World
LATAM – Netflix

EDUCATIONAL DISTRIBUTION
Besides the territory deals we agreed with Cinephil to be part of their new Filmplatform.com. An educational platform that provides US universities with streaming licenses and organizes

director visits and skypes for the films. The streaming license fees goes into the general income stream for the film. The director gets the speaking fees directly.

It's important to note that The Act of Killing is also available through the platform's streaming subscription, and the revenues generated through streaming usage are reported at the end of each customer's license term.

Link to demo can be found here: http://filmplatform.net/about-fp/streaming/#topdemo.

STRATEGY FOR THE FUTURE

Our strategy for the future distribution of TAOK: Whenever a region like for example Scandinavia becomes free we will first sell the region to the highest paying SVOD service for a new MG, if possible and if it makes sense in terms of the offer then non-exclusively. Then we will sell the film to as many MG paying SVOD services in the areas as possible, and add TVOD like iTtunes and Amazon to the lot.

The Agreement

Producer: Bullit Film
Sales Agent: DR Sales, Kim Christiansen / Charlotte Gry Madsen

Producer's summary

THE AGREEMENT was produced by Bullitt Film in co-production with Klaffi in Finland. It was in production 2011 – 13 and its total production budget was 3.867.685. It is a midlengt documentary, 58 minutes long.

Sales agent came on board early to support the work on financing.

Presales
We pitched the project in Sheffield, Nordisk Forum and IDFA and the film was presold to: Denmark, DR 2; Sweden, SVT (Dokument Utifrån), Finland (YLE); Germany/France, ZDF/Arte; The Netherlands, VPRO; Israel, Yes; British Columbia/Canada; Knowledge Network, Croatia; HRT; Estonia, ERR.

The film was produced with support from DFI, Finnish Film Foundation, Creative Europe, Nordisk Film & TV Fond.

VOD parts of the contracts were:
SVT: 6 releases followed på 30 catch-up days over a period of 3 years. Non exclusive
ZDF: Exclusivity in Germany 7 years and 1 year in France
VPRO: 3 releases followed by 30 catch-up days over a period of 3 years. Non-exclusive
Knowledge Network: 25 releases followed by 30 catch-up days over 5 years. Non-exclusive
DR: 12 releases with 12 repeats over a period of 4 years. Three releases can be converted to one VOD-period of 40 days, and three repeats can be converted to one catch-up, 30 days. All non-exclusive.
Yes/DBS: 8 releases followed by 30 catch-up days over a period of 3 years. Non exclusive
YLE: 4 releases followed by 30 catch-up days over a period of 7 years. Non-exclusive.
ERR: 3 releases over a period of three years with 30 catch-up days. Non-exclusive.

Launch
THE AGREEMENT was nominated for a F:ACT AWARD and it opened this new programme series at Cph:Dox 2013 under the presence of two of the films three protagonists on November 8th. The film had two more screenings at the festival in relation with live events followed by screenings at Aarhus Filmfestival the week after.

That same month the film was part of the opening of CRIC: Center for Resolution of Int. Conflicts, in Copenhagen followed by Q&A with director Karen S. Poulsen. This showcase created an important door for other screenings as reps from different international organizations and Danish ministries were present. Our debates connected to screenings have shown us that there is rich opportunity for the film in this field. On an international level the film has had such event screenings at ASIL in Washington, USA, Ciné-Onu in Brussels, EU headquarters in Brussels, The Frontline Club in UK, etc.

Right after the premiere at Cph:Dox, director and producer conducted a Balkan tour with screenings in Albania, Serbia and Kosovo, and with the presence of the two protagonists Borko Stefanovic and Edita Tahiri..

Other
The film has been selected for a number of international film festivals and has been sold to some 20 territories. It was awarded a Special Commendation at Prix Europa 2014. Filmmakers Library in USA holds exclusive rights for the educational market in USA.

”The Agreement” has had quite good press coverage in Denmark and abroad. It is especially worth mentioning thorough interviews on BBC World with Robert Cooper and KarenStokkendal Poulsen and Carol Off´s extensive interview with the same two for CBC ”As it Happens”.

In Denmark an effort has been made together with the Danish Filminstitute to develop a with teacher´s guide for the film to be used in class. This material along the film is available on Filmcentralen. Besides Filmcentralen, the film is available on Blockbuster, Danish Dox, Vimeo On Demand and producer´s own website.

Ratings at DR
The film was braodcast in the week of Cph:Dox at DR 2 at 11 pm and had 44.000 viewers and a 5% share. The film was released right around the time when DR 2 changed their profile. We had hoped that ”The Agreement” would be brodacast in the Dokumania slot a bit earlier, but the film that was shown there actually had lower ratings and viewers, and a comparison with other documentary titles in November on DR we can see that ”The Agreement” has performed quite well.

Future plans
Focusing on the European educational market, especially universities, where there is still a lot of space with only Germany ”ruled out”. Vimeo On Demand and YouTube Channels are recently established.

The Circus Dynasty

Producer: Hansen & Pedersen Film og fjernsyn
Sales Agent: Cat & Doc

Producer's summary

The film premiered on DOXBIO November 19 - 21 2014, selling 2.100 tickets. The result was influenced both by CPH:DOX and the theatrical premieres of The act of killing og Citizen four the same week. Later, the film sold around 800 tickets in various DOXBIO screenings.

The Circus Dynasty premiered internationally at IDFA in Amsterdam and have since been to over 25 festivals, from HotDocs to Korea and Moscow. In April 2015, the film was shown on TV2 in a 2 x 40' version. It had 600.000 viewers and a share of 25 for each broadcast.

The Cirkus Dynasty premiered on YouBio May 28th 2015.

The DVD has been sold at the Circus, where 2000 titles have been sold. In Hansen & Pedersens webshop, 70 DVDs were sold, and 20 DVDs were sold through Laserdisken, Ålborg.

The future plans for The Circus Dynasty is to sell it to iTunes and Amazon.

Free the Mind

Producer: Danish Documentary
Sales Agent: DR Sales

Motley's Law

Producer: Made in Copenhagen
Sales Agent: Level K

Producer's summary

Motley's Law premiered at Chicago FF and won the Grand Jury Award on DOC NYC and AWFJ Award at IDFA. It has played on approx. 20 festivals world wide – many of them in the US. The film sold a fair amount of tickets (1700) in the Danish cinemas and was released for cinema in UK and Poland as well.

The film has been sold or was already pre-sold to 15 countries by our distributor, Level K, who also made the film available on iTunes, Google & Blockbuster. The numbers are very small though – I would say less than a 100 in a total from the release in January 2016.

The biggest tv-sale was made with Al-Jazeera America. The rights have just expired, so we are now selling the film again to National Geographic (exclusive world wide rights) and Amazon (TVOD).

Sport Kids

Producer: Final Cut for Real
Sales Agent: Autlook

Producer's summary

SPORTKIDS is a series of 6 high quality documentary films for kids. The series was produced by Final Cut for Real in Denmark, Sant & Usant in Norway & STORY in Sweden. The production period was from 2012 to 2015. Final Cut for Real took the initiative for the collaboration and the strategy was for each country to produce two kids documentaries each, one national and one taking place abroad. This way we made a film from all the Scandinavian countries including a film in Japan, South Africa and Russia and thereby covered other parts of the world. As Danish director Simon Lereng Wilmont was already in production with the first film "Chikara – The Sumo Wrestler's Son" when we started the collaboration, his two films were produced and realized two years and one year before the 4 other films.

PRESALES DURING THE PRODUCTION PHASE
The film was financed with presales to the following territories:
Denmark (DRUltra) and Norway (NRK Super).

Besides the pre-buys the film was produced with the support of: DFI, SFI, NFI and Nordic Film and TV Fund, as well as smaller local funds.

The VOD parts of the contracts were like this:

All deals started on the 1st of October 2013.

Denmark – 3 years, 30 day streaming after each run + 3 extra 30 days (so a total of 9 x 30 days run a year). As part of the agreement we cannot sell the films to Netflix until after a year after the first screening at DR).

The films have been screened at FOLKETS bio in Sweden who also bought the DVD and VOD rights.

SALES AGENT
Before the world premiere we got AUTLOOK on board as the sales agent.
Spittelbergasse 3/14 I A
1070 Vienna
Austria
www.autlookfilms.com

World premiere and launch
5 of the films premiered at IDFA (Amsterdam) and have since then travelled the world

National premiere
In Denmark the films premiered at BUSTER FILM FESTIVAL. Varicella was nominated for best film at the festival. We also held event screening for the kids before the TV premiere.
The films were shown on DR Ultra in November and December 2015.
In Sweden the films premiered in Malmö at Folkets Bio and in Norway 3 of the films (Dancing for you, Ruth and Varicella) had cinema screenings.

DISTRIBUTION
Other than the above mention distribution, the films have been in cinemas in France and Germany.

Future plans
The plan is to sell the films to a Scandinavian distributor like The Milkey way or Angel Distribution and through them get the film into VOD platforms like Yousee, NetFlix ect. We have been waiting for the DR holdback to be up, which it is now (dec 2016). We will also distribute the films on our own website, Danish documentaries and other VOD platforms.

ARTE has the VOD rights for France and Germany and have made French and German versions of the films.

As the films have not been versioned for English it limits our possibilities internationally. We’re looking into the possibility of dubbing the films.

Appendix 2 - Participants in study

Steering Group
Henrik Bo Nielsen, The Danish Film Institute
Claus Ladegaard, The Danish Film Institute
Klaus Hansen, Danish Producers' Association

Working group
Ane Mandrup, The Danish Film Institute
Louise Haugstrup Jensen, The Danish Film Institute
Palle Dam Leegaard, The Danish Film Institute
Birthe Møller, Danish Producers' Association
Vibeke Vogel, Bullitt Film
Signe Byrge Sørensen, Final Cut for Real

External consultants
Wendy Bernfeld, Rights Stuff (Advisory role)
Cecilie Stranger-Thorsen, Nordisk Panorama Filmfestival (Author of Report)

Case producers
Sigrid Dyekjær, Danish Documentary ("Free the mind")
Helle Faber, Made in Copenhagen ("Motley's Law")
Monica Hellström, Final Cut for Real ("Sport Kids")
Malene Flindt Pedersen, Hansen & Pedersen Film og fjernsyn ("Cirkusdynastiet")
Signe Byrge Sørensen, Final Cut for Real ("The Act of Killing")
Vibeke Vogel, Bullitt Film ("The Agreement")

Other producers
Mette Heide, Plus Pictures
Jesper Jack, House of Real
Anna Ljungmark, House of Real

Sales Agents
Salma Abdalla, Autlook
Kim Christiansen, DR Sales
Philippa Kowarsky, Cinephil

Appendix 3 – Sources

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MAVISE EXTRA: Linear and on-demand audiovisual media services in Europe (2015)
Sundhetstilstanden i dansk dokumentarfilmproduktion, Deloitte (2014)
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Non-Public reports

Den digitale forbruger, Det Danske Filminstitut
Danskernes nye videovaner – tiden efter OTT-tjenesternes indtog YouGov (2013)
Filmmarkedet i Danmark, Notat Wilke (2014)
Financial reports, Production and PR for "*The Act of Killing*", The Danish Film Institute
Financial reports, Production and PR for "*The Agrement*", The Danish Film Institute
Financial reports, Production and PR for "*The Circus Dynasty*", The Danish Film Institute
Financial reports, Production and PR for "*Free the Mind*", The Danish Film Institute
Financial reports, Production and PR for "*Motley's Law*", The Danish Film Institute
Financial reports, Production and PR for "*Sport Kids: Varicella*, *Chicara*, *Fægtemæsterens Søn* and *Ruth*", The Danish Film Institute

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Appendix 4 – Sample template for VOD sales

To position films and do deals with to buyers in the international platforms that won't necessarily know about the film / filmmaker, sales points need to be made.

An Excel sheet like the one below can summarize briefly key points the buyers are looking for. Don't forget links to trailers and screeners available (Vimeo link / password). Trailers are more essential than the screener link for the first pitch. Screeners can always follow.

Regardless of producers wanting to do this job on their own, an overview like this also helps distributors/sales agents do their jobs as producers know their film best.

Rights Stuff Metadata Template

Features - Available Title														
Title	Synopsis	Prod. Year[15]	Genre	Director	Festival/ Awards[16]	Theatrical / DVD[17]	Trailer link	Runtime	Website	Screener	Territory / language	IMDB	Rotten Tomatoes	Notes

Series - Available Titles														
Title[18]	Synopsis	Prod. Year	Genre	Channels	Ratings / Awards	#eps	Runtime[19]	Comm. Hours	Screener	Website	Territory / language	IMDB	Rotten Tomatoes	Notes

Other Formats/Programs (eg. Webisodes) - Available Titles														
Title[20]	Synopsis	Prod. Year	Genre	Channels	Ratings / Awards	#eps	Runtime	Comm. Hours	Screener	Website	Territory / language	IMDB	Rotten Tomatoes	Notes

Programs seeking funding														
Title[21]	Synopsis	Prod. Year	Genre	Channels	Ratings / Awards	#eps	Runtime	Comm. hours	Screener	Website	Territory Notes	IMDB	Rotten Tomatoes	Notes

[15] Sort newer to older
[16] Key festival / awards, not full list
[17] If applicable
[18] Inclusive seasons
[19] Minutes
[20] Inclusive seasons
[21] Inclusive seasons

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Claus Ladegaard, The Danish Film Institute
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Working group
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Vibeke Vogel, Bullitt Film
Signe Byrge Sørensen, Final Cut for Real

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