

Film  
Forever

**INSIGHT REPORT**

# Frances Ha

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# INTRODUCTION

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This Insight Report examines in detail Metrodome Distribution's theatrical campaign for *Frances Ha*, supported by the New Models strand of the BFI's Distribution Fund for its approach to audience building using 'talker' preview screenings.

The film opened at 60 sites nationwide on 26 July 2013, backed by generally enthusiastic reviews and a highly visible PR campaign. To capitalise on this positive buzz, an extensive programme of talker screenings preceded the film's theatrical debut, with the intention of catalyzing word of mouth to deliver a strong opening weekend and ensure the film enjoyed a sustained theatrical run.

Recognising the film's twin appeal to young, urban 'hipsters' and older, upscale arthouse audiences, Metrodome hoped the campaign would maximise the film's chances of finding cinemagoers well disposed to the release within the confines of a relatively modest marketing budget (the campaign's media spend totaled £81,374). The BFI awarded Metrodome nearly £50,000 to meet the cost of the talker programme and associated audience research, representing a quarter of the campaign's total budget of £200,000.

Talkers generally run as follows: a distributor pays one or more media partners (commonly national newspapers,

but also including magazines and brand partners) or a specialist promoter (like ShowFilmFirst) to hire cinema venues and recruit audiences to screenings scheduled a few weeks before a film opens. The distributor stipulates how many free tickets to give away, the geographic spread of screenings and the demographic profile of audiences it wishes to recruit. Media partners promote screenings through the different channels available to them (e.g. print and online advertising, mailing lists etc.), using the film's branding to raise awareness. Readers or subscribers are offered free tickets and encouraged to complete a survey, the results of which are shared with the distributor.

Talker screenings are increasingly common for large-scale releases, where films have consistently rated highly in reviews (four or five stars) and carry the potential for strong word of mouth. The risk of propagating negative word of mouth ahead of release makes it unwise to deploy talker previews for films with mixed or poor reviews.



Talker programmes are also used for specialised titles with more limited distribution budgets, but no systematic evaluation of their efficacy for this type of release has been conducted until now. This Insight Report represents the first attempt to assess the costs and benefits of talker previews for smaller-scale, specialised film campaigns.

*'[N]obody's really sure in this smaller, low print release space whether talker screenings are having any impact at all.'*

Jezz Vernon, Metrodome

The report draws on box office data and the findings of preview audience surveys and exit polling, alongside interviews with key people involved in the campaign, to establish what role talker screenings played in *Frances Ha's* theatrical performance.

# EXECUTIVE SUMMARY

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- Billed as a modern comic fable, *Frances Ha* was felt to have obvious appeal to arthouse audiences and young, upscale urban types thanks to its cinematic references (principally to Woody Allen and the French New Wave), and involvement of indie filmmaker Noah Baumbach and rising star Greta Gerwig.
- Arriving in the UK with positive international festival buzz, the film was released nationwide in 60 cinemas on Friday 26 July 2013.
- Modestly budgeted, Metrodome's release campaign involved a strong PR drive in tandem with a programme of talker screenings funded by the BFI's New Distribution Fund. Total campaign spend was around £200,000. Two fifths of this (41%, £81,374) was spent on media (including print, outdoor and online advertising).
- The campaign strategy aimed to create strong opening weekend box office through high visibility press and PR activity, in the hope that good word of mouth primed by the talkers would sustain a long theatrical run.
- In total, there were 7,723 attendances at 100 talker screenings in 93 sites across the UK and Republic of Ireland. Metrodome worked with seven media partners and promoters selected to hit their target audiences.
- Metrodome also commissioned First Movies International to conduct opening weekend exit polls on Saturday 27 July.
- Opening towards the end of the hottest and driest month since 2006, *Frances Ha* took £150,689 in its first weekend, at the lower end of forecasts. However, its final box office gross was on target, at £742,695 (by 3 November 2013), nearly five times the opening weekend gross.
- The film performed particularly well in London, where venues accounted for 65% of all the money *Frances Ha* grossed during its theatrical run. The film tended to open strongly in arthouse sites elsewhere in the country then fade rapidly. The film failed to take off in multiplexes in towns and cities outside London.
- This is partly explained by the fact that while generally positive, reactions to *Frances Ha*, captured in the talker preview audience surveys, were divided and approval ratings were not as uniformly positive as the film's critical reception suggested they might be.
- As a result, word of mouth among those who might not ordinarily have chosen to see the film was likely to have been more mixed than anticipated, dampening the prospects for peer-to-peer recommendations.
- Evidence suggests the film's appeal resonated most powerfully with a younger section of the metropolitan audience amenable to its offbeat, 'hip' charms, and sites in London did well because such potential audience members are most highly concentrated there. Prominent circuits like Curzon and Picturehouse Cinemas actively cultivate these audiences, and the release benefited as a result.
- The question of how to quantify the impact of talkers on box office performance is far from easy to address. Measuring their direct effect would require a controlled experiment, as too

many confounding factors influence the course of a release. Such an approach is impractical in real world conditions.

- Taking another tack, statistical techniques comparing *Frances Ha*'s opening weekend performance at different sites found no statistically significant relationship between opening weekend box office gross and whether or not a cinema hosted a talker preview.
- A significant relationship was observed between the number of talker preview attendances at sites and their opening weekend box office gross, but this correlation is no indicator of causality. Sites where the film opened were judged by exhibitors and Metrodome to have the best chance of success with *Frances Ha*, and they were selected for preview screenings for much the same reason. We cannot, therefore, exclude the possibility that one or more other factors were responsible for talker attendance and opening weekend box office.
- Survey evidence offers the best indication of the impact of talkers. Opening weekend exit polls suggest the talker programme directly influenced between 2% to 5% of ticket sales during the first weekend, or £3,014 to £7,534 in box office gross. Applying the same logic to box office gross in the first full week of play, the talker contribution is estimated at between £5,710 and £14,276.
- Favourable media coverage linked to the programme is likely to have had an even bigger effect. According to exit polls, print coverage had the most significant effect on audience awareness of *Frances Ha*: two-fifths (39%) of respondents identified newspaper and magazine reviews, articles and advertisements in this connection.

- Having a well-regarded film and good PR were key to the film's performance. The latter was undoubtedly enhanced by talker preview media partnerships.
- Assuming the direct contribution of talkers to the film's box office gross lay somewhere in the region of £3,014 to £14,276, and the cost of associated media coverage was valued at around twice that of the talkers (according to estimates), then this release strategy can be judged cost effective for *Frances Ha*.
- Furthermore, the talker programme did not unduly harm the film's box office performance against projections (by, for example, cannibalising ticket sales), suggesting the campaign was justified in view of the potential risks involved.

In conclusion the campaign offers several lessons:

1. The case of *Frances Ha* supports the view that talkers' principal benefit is in generating cost-effective coverage through sympathetic and supportive media partners.
2. Press reviews, though influential in raising awareness of films, are not always an accurate guide to a title's potential for positive word of mouth. In this case, the view of broadsheet critics proved out of step with mainstream opinion of the film's singular, metropolitan character. The unanimity of critical response (albeit with some exceptions) was unmatched elsewhere and the film proved more divisive with viewers than anticipated.
3. Metrodome's experience with *Frances Ha* confirms the need for talker previews to be properly targeted, and at this scale

of release there seems little benefit in booking preview sites unlikely to participate in the opening weekend (as happened with Odeon and Showcase cinemas).

4. Talkers can enhance the commercial relationship between distributor and exhibitor, by demonstrating a distributor's commitment to a strong title, giving sympathetic exhibitors additional reason to back the film, and giving participating exhibitors (when properly targeted) a value-added experience for their audiences and members.

Further research is necessary to address questions around how talkers generate word of mouth over the course of a release campaign, and how this, in turn, translates into box office. This could inform development of guidance for distributors with limited resources in deciding the most appropriate, and cost effective, number of talker attendances to commission.

Specifically, more could be done to build a body of audience survey evidence on the subject, researching the underlying mechanics of the way peer-to-peer recommendations operate for different types of film and release strategy, and building exit poll benchmarks for talker influence so distributors can compare performance against industry norms.



# SECTION ONE: PLANNING AND EXECUTION

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## 1.1 Overview

Shot in black and white, comedy-drama *Frances Ha* is Noah Baumbach's second collaboration with Greta Gerwig, who plays the eponymous lead and co-wrote the screenplay.

The film, billed as a modern comic fable, follows twenty-something Frances as she flits through her nomadic life, pursuing an unlikely dream of making it as a professional dancer. With touches of Woody Allen (*Manhattan* is frequently name-checked in reviews) and the French New Wave, the film has obvious appeal to arthouse audiences. In addition, the filmmaker's indie credentials (*The Squid and the Whale* [2006], *Greenberg* [2010]) coupled with Gerwig's involvement ('It girl' persona off screen, loveable goofball on screen) and an eclectic soundtrack, are draws for younger audiences in search of novelty and 'hip' entertainment.

Arguably Baumbach's warmest and most accessible work to date, the film arrived in the UK on a wave of positive reviews and festival buzz. Shortly after premiering at the Telluride Film Festival in September 2012, the film screened at Toronto Film Festival, where IFC Films picked up the North American rights. IFC opened the film at four sites on 17 May, grossing \$137,398 in the first weekend, before eventually widening the release to 233 cinemas. The film played for 17 weeks in the US, taking just over \$4 million (£2.5 million).

Metrodome picked up the UK rights from Celluloid Dreams in January 2013, overcoming strong interest from other buyers, including Picturehouse Entertainment.

*'The film was very buzzy when we acquired it in terms of the industry. There were a few people who were after it. So we secured it and straightaway there was industry perception that it was a very good film, the performances, the way it had been done, there's some pedigree in the director.'*

Jezz Vernon, Metrodome

*'We actually tried to buy the film. So as far as I was concerned, it was a film that I thought would do very well, and [...] I personally loved it.'*

Clare Binns, Picturehouse Cinemas

By their own admission, Metrodome lacks the requisite budget to spend £500,000 on marketing and distribution to secure box office receipts of £750,000, with no guaranteed SVOD or Pay TV output to justify it. In order to make the release strategy work, they needed to get maximum value for money from their media spend, in particular by generating a critical mass of pre-release press coverage. The talker preview programme was central in this regard.

*'[T]here would be a healthy but small strategic media spend, not enough to deliver the result alone - in that low print release [category] the spend can never create a box office hit: it's always press that's essential.'*

Jezz Vernon, Metrodome

In June 2013 the film made its UK debut at the Edinburgh International Film Festival, where it was nominated for an Audience Award. In line with its reception in the US, press screenings in the UK generated an impressive number of 4 and 5 star reviews, in theory making the film a perfect vehicle for talker previews.

## 1.2 Campaign strategy

Lacking the resources to ‘buy’ a strong opening weekend with an extensive marketing campaign, Metrodome felt *Frances Ha* was most likely to succeed theatrically if it had time to find and build its audience at key sites and cities. The campaign strategy therefore aimed to create strong opening weekend box office through high visibility press and PR activity, in the hope that good word of mouth would sustain a long theatrical run.

Metrodome identified frequent cinemagoers in the ABC1 group as the target audience, especially fans of arthouse and American indie films. They recognised the film had initial female appeal although feedback from early screenings suggested the audience response was less divided along gender lines. In other words, if you could get males in the target groups to attend, they were just as likely to enjoy the film as their female counterparts.

Given the film’s urban setting and likely appeal, the campaign was focused on London and key cities, including those with large student populations (Manchester, Edinburgh, Glasgow, Bristol, Oxford, Cambridge, Newcastle, Sheffield, Nottingham, Brighton, Liverpool, Cardiff, Bath and Birmingham).

The late July release date was chosen to provide exhibitors with a classic counter-programming option in the over-crowded blockbuster season. In the run up to release Metrodome had firm commitments from key arthouse circuits (Picturehouse, Curzon, ICO and Everyman), and were in negotiations for selected multiplex sites with Cineworld, Vue and Odeon.

*‘It was a very good date for us. We’re always looking for films, quality films, in a period where there aren’t those quality films.’*

Clare Binns, Picturehouse Cinemas

The idea of using talker screenings for specialised films is not new, but such programmes tend to be small-scale, working with key media partners in an effort to generate coverage and raise awareness of a title. Such talkers are felt to be a cost effective way of garnering media attention, but their modest scale makes them less effective at generating sufficient word of mouth to justify the expense on these grounds alone.

Although lacking the kind of budget necessary for a preview programme on a scale of those conducted by the major studios, which can involve many tens of thousands of attendances, Metrodome nonetheless saw an opportunity for a more systematic and concerted attempt to raise the film’s (and it’s star’s) profile through media coverage while also kick-starting positive word of mouth around the country.

*‘[One] concern I had was that [people] didn’t know who the lead actress was, they may vaguely have heard of *The Squid and The Whale*, which was the Director’s previously best grossing film in the UK, but they certainly hadn’t heard of *Frances Ha*. I felt that we should be doing as much by way of preview screenings as we could.’*

Jezz Vernon, Metrodome

By hosting a significant number of talker preview screenings in the weeks before release, Metrodome hoped to capitalise on PR and media coverage, reviews and advertising thereby generating a strong opening weekend and site average and enabling the film to stay on screen longer and maximise its box office gross.

*‘[P]ut another way, you have your opening weekend campaign and on top you add the equivalent of week two word of mouth buzz.’*

Metrodome application to BFI New Models Strand

Metrodome therefore had two clear aims for the preview programme:

- To leverage coverage by media partners which would otherwise be too costly or unattainable for a specialised film on limited release;

*‘We know full well that if you sign up to any kind of talker screening you get a phenomenal amount of press coverage within the magazine and online which is far more cost effective than if you’re just buying paid for advertising.’*

Jezz Vernon, Metrodome

- To generate a significant number of word of mouth recommendations among the target audience.

*‘The theory was good word of mouth from wide talker screening programmes can jump start a film’s opening weekend box office, that might otherwise have a soft opening weekend but then go on to pick up during the week.’*

Kate Bradford, ShowFilmFirst

Every release strategy carries an element of risk, and talker previews are no exception. Metrodome understood the two principal risks associated with talkers and had good reason to believe they could be mitigated in the case of *Frances Ha*:

1. The film generates mixed or negative word of mouth, thereby undermining the release strategy

The positive reviews and feedback from festival screenings gave Metrodome confidence this would not be a factor for *Frances Ha*.

*‘The reason I felt preview screenings were so important was because we’d had almost universally fantastic press reactions and indeed they had been the best press reactions we’d ever experienced for a film [...] [T]here’s no point if you have a 3.5 star film giving away thousands and thousands of free tickets because there would be no roll-on effect.’*

Jezz Vernon, Metrodome

2. Making free tickets available to target audiences ahead of release cannibalises ticket sales

Although acknowledging this potential cost to the campaign, Metrodome felt comfortable balancing the number of free admissions it allocated to the campaign against the benefits of securing media coverage at a fraction of the cost of paid advertising.

### 1.3 Expectations

At the upper end of its forecast range, Metrodome anticipated a box office gross of £700,000, based in part on the track record of Noah Baumbach’s earlier titles (see Table 1). The filmmaker’s best performing film to date, *The Squid and The Whale*, took around this total in 2006 (without adjusting for inflation), opening at only 17 sites. Success on this level would ensure *Frances Ha* recouped its marketing and distribution costs from theatrical revenues and set the stage for decent ancillary revenues (including home entertainment and non-theatrical bookings).

*Greenberg* (2010), the first Baumbach and Gerwig collaboration, saw more modest performance than *The Squid and the Whale*, despite opening at 64 sites. Its box office total, £446,000, marked the lower end of the *Frances Ha* forecast.

*‘I think [Metrodome] realised the last films that director Baumbach and Gerwig had done had slightly disappointed both in terms of their critical reception and in terms of their commercial success. I think that they knew the talker screenings would be a way to get people to see the film and say “Hey, they’re back on form and we don’t need to have any reservations about going to see this film and we don’t need to have any reservations about recommending it to our friends.”’*

Jason Wood, Curzon Cinemas

Table 1: Previous Noah Baumbach films in the UK

Title	Opening weekend			Total box office
	Screens	Box office	Screen average	
<i>The Squid and the Whale</i> (2005)	17	£71,203	£4,188	£708,378
<i>Margot at the Wedding</i> (2007)	17	£33,958	£1,998	£128,391
<i>Greenberg</i> (2010)	64	£118,804	£1,856	£446,133

Source: Rentrak/ BFI

Metrodome’s application to the BFI also made specific mention of the second weekend drop off, which is the percentage decline in box office gross from the opening to the second weekend. The drop off usually sits in the 30-50% range, with some titles doing much better (occasionally recording an increase in second weekend takings) or worse. In *Frances Ha*’s case, Metrodome hoped to see a decline of less than 30% as word of mouth built from pre-release through the opening week, helping to secure exhibitor bookings going forward.

- Opening weekend exit polls at selected sites.

The broad headings of campaign costs are listed in Table 2. The largest proportion of spend went on media, including print, outdoor and online advertising. The talker preview screenings cost around £32,000, equivalent to 16% of the total campaign budget. The BFI’s award to Metrodome (£47,797) covered the cost of the talker programme and associated research.

#### 1.4 Execution

In order to deliver these results, and provide necessary insights into the release strategy’s success, Metrodome’s campaign comprised the following elements:

- Extensive PR around the film, Noah Baumbach and Greta Gerwig;
- A talker programme with key media partners;
- Talker audience surveys;
- Limited, strategic advertising for an opening weekend call-to-action (print, outdoor, online and TV);
- Social media activity (Twitter and Facebook);

Table 2: *Frances Ha* campaign costs

Media partner/ promoter	Date	Participating exhibitor(s)
<b>Media</b> (includes print, outdoor and online advertising)	£81,374	41%
<b>Talker previews</b> (includes ticketing and media partner fees, cinema hire)	£31,700	16%
<b>Publicity</b> (includes PR fees and expenses, press screenings)	£23,303	12%
<b>Production</b> (includes poster, trailer and TV advertisement production)	£7,310	4%
<b>Digital and other</b> (includes virtual print fees, audience research and exit polls)	£55,302	28%
<b>TOTAL</b>	<b>£198,989</b>	<b>100%</b>

Strong PR was central to the campaign, building awareness and buzz that would carry through into word of mouth generated by the talker previews.

Metrodome’s press team had a good base to work from, with favourable international festival coverage that could be parlayed into early ‘must see’ and ‘one to watch out for’ recommendations. Working alongside Way to Blue (online coverage), the team built considerable coverage around Greta Gerwig, up to four months ahead of release.

Closer to release this was complemented by favourable reviews from the all-important broadsheet press, alongside Metrodome’s success in securing high profile PR features with the film’s star and director.

The film was lead review in *The Guardian* (3 stars, Peter Bradshaw, 25 July) and *The Financial Times* (4 stars, Nigel Andrews, 25 July), and scored 5 stars in both *The Daily Telegraph* (Tim Robey, 25 July) and *The Times* (Kate Muir, 25 July) (with another 4 star review in *The Independent*, Anthony Quinn, 26 July).

*‘I think releasing the film on that date they got the lead reviews in the press, there wasn’t really a lot of competition.’*

Jason Wood, Curzon Cinemas

Greta Gerwig was interviewed by Emma Brockes in *The Guardian Weekend* magazine on 13 July, and that same weekend she made the cover of *The Sunday Times Culture* section (14 July), with a profile by Jonathan Dean. Later in the month, the actor was interviewed in the Arts pages of *The Independent* by Kaleem Aftab (30 July). Meanwhile Xan Brooks interviewed Noah Baumbach in *The Guardian’s* G2 section on 19 July, and *The Daily Telegraph* reprinted a *New Yorker* article about the director, by Ian Parker, on 20 July. Interviews also appeared in *The Financial Times* and *The Independent* around this time, and Gerwig featured on the cover of *Sight & Sound* (August 2013 edition).

*'I had the press work very hard to get the lead actress placed as an 'It girl' in opinion-former, long-lead, up-market female magazines and that was then able to roll down through the slightly more mass media nearer the time of release [...] We always say that you have to be able to editorialise a film at this level of release to really get [results]. Reviews alone won't carry it.'*  
Jezz Vernon, Metrodome

Metrodome went on to win the Best PR Campaign of the Year for *Frances Ha*, at the Screen Marketing & Distribution Awards 2013.

Exhibitors played their part, too. For example, a feature on the film appeared in Curzon Cinema's members' magazine and the Cineworld blog offered multiplex audiences five reasons to see *Frances Ha*:

1. It's a deeply cool slice of indie cinema
2. It's also a movie for real film buffs
3. The film has got a cracking soundtrack
4. Greta Gerwig gives a terrific performance
5. It's genuinely warm-hearted

<http://www.cineworld.co.uk/blog/frances-ha-wednesdate>

A strong trailer and poster (which won Best Poster Design at the Screen Marketing & Distribution Awards) also contributed to the campaign:

*'I think their campaign was excellent, I think the poster image was brilliant. I think they cut a really, really smart trailer focusing on Greta Gerwig who's a kind of indie darling.'*  
Jason Wood, Curzon Cinemas

The talker programme comprised 100 screenings in 93 venues across the UK and Republic of Ireland, in the three-week

period running up to the opening weekend (Table 3). Attendances totaled 7,723, which fell short of Metrodome's target (10,000) due to a range of factors including last minute cancellations and rescheduled dates.

Metrodome concedes it should have been more diligent in securing the target number; in mitigation, this would challenge any small, independent distributor working with multiple partners for the first time.

In all, Metrodome worked with seven media partners and promoters selected to hit their target audiences, including broadsheet press, Sky, Emerald Street (online style and culture guide) and Elevenfiftyfive (film PR agency). For a fee, partners booked venues and offered free tickets through readers' offers, promotional mailings and brand partnerships. Talker sites were chosen to ensure a geographic spread across key cities and urban markets.



Table 3: Talker details

Media partner/ promoter	Date	Participating exhibitor(s)	Attendance
The Times	Monday 8 July	Cineworld	1,580
Sky	Tuesday 16 July	Cineworld, Odeon, Vue	2,712
The Daily Telegraph	Monday 15 July & Tuesday 16 July	Odeon, Showcase, Courthouse Hotel	916
The Guardian	Sunday 21 July	Picturehouse Cinemas	1,440
ShowFilmFirst	Monday 22 July	Odeon, Showcase	915
Emerald Street	Tuesday 23 July	Soho Hotel	Cancelled
Elevenfiftyfive	Thursday 25 July	Frame Gyms	160
		TOTAL	7,723

Source: Metrodome Distribution

ShowFilmFirst, a specialist preview agency, ticketed previews promoted by *The Daily Telegraph* and *The Guardian*, and contributed later to the talker programme to widen the target audience (with promotions through Tastecard, Disaronno and Student Money Saver) after disappointing word of mouth potential from the earlier previews:

*'[Our] brief was to broaden the film out to a wider female audience, beyond the core arthouse crowd. From the early talkers there was poor word of mouth from older, upmarket audience so we pitched it at*

*students and females of all ages who liked films like Bridesmaids/Jennifer Aniston/Sex and the City/Girls etc in the hope that they liked the film more.'*

Kate Bradford, ShowFilmFirst

The campaign plan originally included an additional talker programme employing online streaming technology. The idea was to supply up to 200 viewers in key locations with a secure link, giving them access to the film over a 48-hour period; but it was eventually dropped:

*'I think we were just nervy about it. Theoretically it was interesting but it was cancelled because it felt a bit too similar to free VOD and there was just a feeling that it wasn't quite the right thing to do.'*

Jezz Vernon, Metrodome

Finally, Metrodome commissioned First Movies International to conduct opening weekend exit polls (on Saturday 27 July) across two performances at four venues that hosted talker previews (Cineworld Cardiff, Vue in Islington, Cineworld Birmingham and the Watershed in Bristol) and two that didn't (Curzon Soho and Cornerhouse, Manchester).

## SECTION TWO: RESULTS

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### 2.1 Theatrical box office

*Frances Ha* opened towards the end of the hottest and driest month since 2006, factors that can hamper box office performance, particularly of specialised titles lacking 'event movie' status. In fact 2013 saw the worst box office gross for July since 2008, and it was down 8% year-on-year compared with 2012. With a total of 14.3 million admissions, the month was well below average for July over the period 2008 to 2012 (19 million).

Although opening day, Friday 26 July, was hot and sunny, thundery showers moved across the UK over the weekend, which may have brought some relief to exhibitors. The weather is one variable a distribution campaign cannot effectively control for, and it can confound even the best-laid plans.

Nevertheless, *Frances Ha* had other factors in its favour. Several arthouse releases earlier in the summer witnessed muted business, a situation that may have been exacerbated by the weather but also

reflected the lack of standout titles in this market space. Independent cinema circuits that depend on strong specialised programming were in desperate need of a hit, and hopes were high for *Frances Ha*.

*'Talking specifically from Curzon's perspective, the film was released on July 26th and it came along at a point where the market had been really static. The whole of July had basically been a bit of a write-off for arthouse products [...] The only film in that period which had any kind of success was Wadjda which was from Soda. So the market was really static, the worst I can remember in arthouse programming for a while.'*

Jason Wood, Curzon Cinemas

Against this background we need to judge the opening weekend, and it was neither a particularly strong performance nor was it a marked disappointment. By the end of the first weekend the film had taken £150,689 at 60 sites (a site average of £2,511), which Metrodome's Jezz Vernon described as "soft against expectation" though "not embarrassing".

Table 4: Opening weekend, top 15 performers

	Title	Sites	Weekend gross	Site average
1	<i>The Wolverine</i>	522	£4,694,092	£8,993
2	<i>Monsters University</i>	563	£3,114,562	£5,532
3	<i>Despicable Me 2</i>	560	£2,085,392	£3,724
4	<i>The World's End</i>	548	£1,435,469	£2,619
5	<i>Now You See Me</i>	397	£880,783	£2,219
6	<i>Pacific Rim</i>	442	£732,249	£1,657
7	<i>The Internship</i>	140	£174,945	£1,250
8	<i>World War Z</i>	188	£168,060	£894
9	<i>Frances Ha</i>	60	£150,689	£2,511
10	<i>Man of Steel</i>	109	£78,014	£716
11	<i>The Croods</i>	212	£75,574	£356
12	<i>The Frozen Ground</i>	104	£61,775	£594
13	<i>This is the End</i>	66	£48,758	£739
14	<i>Wadjda</i>	29	£35,677	£1,230
15	<i>Best of Luck</i>	14	£31,258	£2,233

Source: Rentrak/ BFI

Using the industry standard average ticket price we can estimate the opening weekend saw over 20,000 admissions to *Frances Ha*. The question is: how many of these were driven by recommendations generated by the talker programme?

Given all the different variables at play, including the effect of other campaign elements (notably PR), it is impossible to say with any certainty. However, that weekend's exit polls offer some indicative evidence.

The questionnaire asked audience members how they found out about *Frances Ha*, including 'through coverage of preview screenings' and 'through friends who saw a preview screening'; 5% of 469 respondents to the question identified one or other of these factors. A subsequent

question asked whether a friend who saw a preview and recommended it motivated attendance, and 2% said it did.

Assuming the exit poll results are representative of all opening weekend audiences, we can therefore estimate the talker programme directly influenced anywhere between 2% and 5% of ticket sales during the first weekend, equivalent to £3,014 to £7,534 in box office gross.

If we apply this same evidence to the film's box office total at the end of the first week, we can estimate the box office gross contribution of between £5,710 and £14,276 (Table 5). However, this assumes the talkers had an effect during the first week consistent with the opening weekend. In truth, word of mouth would have spread organically from paying audiences during this period on a far larger scale than the pre-release talker programme could have achieved.

Table 5: Estimated direct contribution of talkers

Period	Box office gross in period	Estimated direct contribution of talkers (2% to 5% of total)
Opening weekend	£150,689	£3,014 to £7,534
Opening week (26 Jul – 1 Aug)	£285,518	£5,710 o £14,276

Source: Rentrak/BFI, First Movies International, Bigger Picture Research analysis

Although we cannot say whether preview screenings were the determining factor in motivating attendance in all these cases, this estimate of the talkers' impact on the opening weekend is likely to be conservative. It is reasonable to assume that coverage by media partners, notably the broadsheet press (*The Guardian*, *The Daily Telegraph* and *The Times*) had a complementary but indirect effect on admissions, by raising awareness more generally and reinforcing other motivating factors. Exit poll respondents may not even have been aware that such coverage was linked to previews, hence this aspect is likely to have been under-represented in survey responses.

This is relevant because print media coverage is crucial to opening weekend performance, and *Frances Ha*'s release campaign was determinedly print-led. Exit polls indicate that print coverage had the most significant effect on audience awareness of *Frances Ha*: two-fifths (39%) of respondents identified newspaper and magazine reviews, articles and advertisements in this connection. Advertisements, the only directly paid-for element of print activity, had less influence than articles and reviews. Clearly, having a well-regarded film and good PR were key to the film's performance. The latter was undoubtedly enhanced by talker preview media partnerships, although it is impossible to quantify their impact in box office terms.

The campaign had an element of social media activity, but it never really gained traction and exit polls show that Twitter and Facebook had minimal impact on awareness of the film.

Turning to the film's second weekend on release, the three-day gross totaled £89,126 across 52 sites (Table 6), a decline of 41% on the previous weekend's take. This level of second week drop off falls squarely within the normal range quoted in Metrodome's application to the BFI (30-50%); whatever positive impact the talker programme had on the opening weekend, the 'roll on' effect of word of mouth driving new admissions was more muted than Metrodome anticipated.

Table 6: Second weekend, top 15 performers

	Title	Sites	Weekend gross	Site average
1	<i>The Smurfs 2</i>	510	£3,220,911	£6,316
2	<i>The Heat</i>	440	£2,500,522	£5,683
3	<i>The Conjuring</i>	371	£2,156,124	£5,812
4	<i>The Wolverine</i>	525	£1,800,640	£3,430
5	<i>Monsters University</i>	573	£1,753,216	£3,060
6	<i>Despicable Me 2</i>	527	£1,289,450	£2,447
7	<i>Red 2</i>	430	£1,023,349	£2,380
8	<i>The World's End</i>	469	£681,301	£1,453
9	<i>Only God Forgives</i>	188	£465,917	£2,478
10	<i>Now You See Me</i>	317	£436,597	£1,377
11	<i>Pacific Rim</i>	187	£281,955	£1,508
12	<i>Epic</i>	328	£151,070	£461
13	<i>Frances Ha</i>	52	£89,126	£1,714
14	<i>The Internship</i>	72	£45,845	£637
15	<i>World War Z</i>	85	£44,728	£526

Source: Rentrak/ BFI

A word of caution is necessary when considering the second weekend decline figure. Although it can be used for making broad-brush judgments about a film's ongoing prospects, as an aggregated number it masks a great deal of local variation. Numerous factors are at play at each site showing the film, from the scheduling and number of performances it is booked to play to the effectiveness of venue-specific marketing and the local playability of other films vying for audiences. As Table 7 demonstrates, the second week drop off varied widely between cinemas, with some sites recording sizeable box office increases in the second weekend, while others saw steep declines.

Table 7: Examples of variations in second week performance

Period	Difference in box office gross between first and second weekends
Watershed, Bristol	+39.5%
HMV Curzon, Wimbledon	+18.9%
Curzon Soho	+2.8%
Cineworld Wandsworth	-74.0%
Curzon Richmond	-78.3%
Duke of York's, Brighton	-93.8%

Source: Rentrak/ Bigger Picture Research analysis

Jason Wood, of Curzon Cinemas, illustrates the point with reference to Curzon Richmond, which witnessed a 78% decline in the second week:

*'[The] first week of business on Frances Ha in Richmond, on split shows, was actually very good so When Only God Forgives came in on August 2nd I decided I wanted to preserve Frances Ha for a show daily. I had to call up Lionsgate and say, "Look I know you're due to start on all shows but Frances Ha came in before on split shows and actually did pretty well and I want to make an argument to keep Frances Ha for a show daily". So on that August 2nd week Frances Ha was still playing because it deserved to be in the cinema. [But] it would only have been playing for one show daily, hence that huge drop off.'*

Jason Wood, Curzon Cinemas

At the time of writing, towards the end of the film's theatrical run, total box office gross stood at £742,695 (3 November 2013), in line with Metrodome's original forecast. The total is nearly five times the opening weekend haul. On this measure the release can fairly be judged a success, although for reasons stated earlier it is not possible to reliably quantify the contribution made by the talker previews.

*'We as a company felt anything over £500,000 would be respectable. [W]hat's nice is on top of the huge editorial impact and awareness the film had, when you begin hitting £700,000-£800,000 box office then your ancillary value [e.g. home entertainment] increases.'*  
Jezz Vernon, Metrodome

At this point it is worth commenting on the importance of key circuits and sites to the film's overall performance, dominated by London-based venues. Both Curzon and Picturehouse Cinemas provided enthusiastic support for *Frances Ha*, and the film performed well at many of their sites. Cinemas owned and programmed by Curzon accounted for 17% of the film's total box office gross, with Curzon Soho alone taking over £85,000. Picturehouse Cinemas shared a further quarter (25%) of the total, and their three best performing sites (Hackney Picturehouse, the Ritzy in Brixton and the Gate in Notting Hill) saw tickets sales totaling around £85,000.

*'The film ran for 6 weeks at Curzon Soho and in those 6 weeks it was the top grossing film every week [...] It was one of those films where we were selling out on the opening weekend, people were coming out and talking about the film, and it had the [effect] of completely reigniting our summer.'*

Jason Wood, Curzon Cinemas

In all, London-based venues accounted for 65% of all the money *Frances Ha* grossed during its theatrical run. The film often opened strongly in arthouse sites in metropolitan areas around the country, then faded rapidly:

*'Something in general I think is more and more an issue for films with that metropolitan feel [is that] outside London it's becoming harder and harder for these films [...] [The] opening week was fine but once it had played its second week it disappeared much more quickly outside of London [...] The further away you got from London the less of an impact the film had.'*

Jason Wood, Curzon Cinemas

Equally, the film never took off at multiplex sites in towns and cities outside London. It played only two Odeon sites, both in London (Covent Garden and Panton Street), which saw respectable business (totaling £23,000), while Cineworld Cinemas secured 10% of the film's box office total, half of which came from two London sites (Cineworld Fulham Road and Haymarket). It was a similar story for Vue, which played the film at 26 sites around the country, grossing 4% of the total (40% of which came from Vue Islington in London).

*'I don't think the out of town [multiplexes] necessarily cracked the film. Actually there was an experiment where Cineworld [...] offered us four very unlikely sites for a locked in period of several weeks [...] despite the extended run the figures were dreadful at those sites and [...] I think we ran at a loss in all of them just through paying VPF and delivery. But we're grateful to Cineworld for experimenting.'*

Jezz Vernon, Metrodome

## 2.2 Audiences

To understand why the film worked so well in key London sites but not elsewhere, despite talker previews around the country, audience research conducted at the time proves instructive.

While generally positive, reactions to *Frances Ha*, captured in the talker preview audience surveys, confounded expectations. The film divided opinion, and approval ratings were not as uniformly positive as the film's critical reception suggested they might be.

*'Clearly it matched perfectly the taste of the Press. But in terms of a cross-section [of the population] there were some very strong reactions against it [...] If you are young, hip, urban-leaning and edgy then you'll like the proposition and you'll like the film. But if it's not a film you'd voluntarily go and see, chances are you'll find it objectionable.'*

Jezz Vernon, Metrodome

As a result, word of mouth among those who might not ordinarily have chosen to see the film was likely to have been more mixed than anticipated, dampening the prospects for peer-to-peer recommendations.

*'To be honest, [the audience reaction] probably wasn't as good as we would have liked for a word of mouth film [...] Potentially its [appeal] wasn't as broad as the distributor had anticipated.'*

Kate Bradford, ShowFilmFirst

Table 8 summarises the main talker preview audience survey findings. Results varied across the different talker programmes, with the film's approval ratings ('excellent' or 'good') ranging from 40% to 63%. Even at the upper end, these results are not especially strong for a film attracting four and five star reviews.

The proportion of the audience who would recommend the film to a friend also varied, from just 33% of those attending ShowFilmFirst previews to 52% of the audience at *The Times* screenings. Again, these numbers are on the low side for a release built around a word of mouth campaign.

Table 8: Talker preview audience survey results

	The Times (8 July)	Sky (16 July)	The Daily Telegraph (16 July)	The Guardian (21 July)	Show Film First (22 July)
Number of respondents	278	294	167	188	482
'Excellent' or 'good' rating	57%	49%	40%	63%	52%
Recommend to a friend	52%	48%	39%	46%	33%
<i>Gender</i>					
Female	43%	-	-	55%	65%
Male	57%	-	-	45%	35%
<i>Age</i>					
40+	-	-	-	56%	50%
31-40	-	-	-	25%	24%
19-30	-	-	-	20%	25%
Under 18	-	-	-	0%	1%

Sources: ShowFilmFirst, Metrodome Distribution

The opening weekend exit polls tell a more positive story, reflecting the fact that respondents **chose to pay** to see the film, and were therefore predisposed to its key selling points.

Poll results reveal the opening weekend audience was skewed towards females (58%), as expected, with an average age of 40, two thirds of whom were frequent cinemagoers (attending once a month or more).

In terms of ratings, the film scored 30% 'excellent', in line with the industry norm, and there were no significant differences by age or gender. A further 42% rated it 'very good', giving it a favourable score of 72% (above the industry norm of 60%). According to the exit poll report, these favourable ratings were 'significantly driven by the younger audience'. London-based respondents were more likely to rate the film favourably than those outside London (75% compared with 69%).

Half of exit poll respondents (51%) said they 'would definitely recommend' the film to friends and family (the industry norm is 50%); younger females were most likely to recommend *Frances Ha*, and older males were least likely to do so. Again, respondents in London were more likely to recommend the film than those in other parts of the country (54% compared with 48%).

Taken together, this evidence suggests the film's appeal resonated most powerfully with a younger section of the metropolitan audience amenable to its offbeat, 'hip' charms, and sites in London did well because such potential audience members are most highly concentrated there. Just as importantly, given the film's success at key London sites programmed by Curzon and Picturehouse Cinemas, such audiences have a pre-established relationship with certain circuits that can be mobilised to good effect around the right film.

## SECTION THREE: DISCUSSION AND LESSONS

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*‘Accurate measurements are very difficult to quantify [...] and it is all about gut instinct, about whether something’s worked or not.’*

Clare Binns, Picturehouse Cinemas

This final section considers in the round all the evidence about the *Frances Ha* release campaign, identifying any future lessons. But first it is necessary to say a few words about limitations of the present enquiry, as they condition the type and quality of conclusions we can draw.

The central research question (did the talker programme make sufficient difference to the film’s theatrical performance to justify expenditure?) requires a controlled experiment to answer with any degree of confidence. In other words, research would need to compare the performance of two, near-identical film releases, one using talkers the other not, while controlling for other key variables (like the quality and ‘talkability’ of the films, release dates, PR activity etc.). Any observed differences could then be attributed to the talkers.

As such a scenario is unlikely ever to avail itself in real world conditions, we must content ourselves with proxy measures. For the present research, we have the film’s box office and audience survey data, alongside the professional testimony of those involved in the release. This evidence allows us to make an informed estimate of the impact of *Frances Ha*’s talkers, but no more than that.

Another type of research design, using statistical techniques to compare the opening weekend performance of the same film released at two groups of sites (those where talkers occurred and those where they did not), yielded inconclusive

results. Appendix 1 reports the findings in greater detail, but in summary there was no statistically significant relationship between opening weekend box office gross and whether or not a cinema hosted a talker preview.

A significant relationship was observed between the number of talker preview attendances at sites and their opening weekend box office grosses, but this correlation is no indicator of causality. Sites where the film opened were judged by exhibitors and Metrodome to have the best chance of success with *Frances Ha*, and they were selected for preview screenings for much the same reason. We cannot, therefore, exclude the possibility that another factor was responsible for driving both talker attendance and opening weekend box office.

Distinguishing between the effect of word of mouth sparked by talker previews and word of mouth generated after a film is released also poses a challenge. Around 8,000 people saw the film ahead of release, while over 20,000 saw it during the opening weekend, a difference in scale not lost on Metrodome:

*‘The problem is far higher quantities of people see that film on the opening weekend and opening week than have seen it in the talker screenings [...] Being able to extricate the effect of the talker screenings and the effect of X thousand people seeing it in its first week of release, it’s tricky.’*

Jezz Vernon, Metrodome

So we come back to what we know about the release. Ultimately the campaign was successful; there is no doubt of that. The film performed in line with projections, at least in terms of its final box office gross. The extent to which the talker programme contributed to this can only be inferred, given other factors at play. Survey evidence suggests the film’s award-winning PR campaign, particularly the resulting print coverage, was a major draw.

Even here, though, the talker programme is likely to have played a role through involvement of media partners.

Two circuits, Odeon and Showcase, participated in the talker programme but did not subsequently book *Frances Ha* in the majority of sites involved, which may have undermined the effectiveness of these previews (in total Odeon accounted for 2,051 talker attendances and there were 653 to Showcase previews). Could *Frances Ha* have performed better had the talker programme been run differently (with higher attendances, more or different sites etc.)? We can never know; suffice to say, opening weekend exit polling revealed a relatively low level of awareness generated directly by talker preview recommendations, even among sites where talkers took place.

This evidence should be weighed against the views of exhibitors interviewed for this research, who certainly felt the talkers had a beneficial effect at their prime London sites:

*'The talker screenings just meant that there was a buzz about this film so when it opened there was a kind of collective desire to see it. And it couldn't have gone better. From my point of view it's one of those textbook releases.'*

Jason Wood, Curzon Cinemas

Taking all these strands of evidence into consideration, we can make the following observations:

- Up to one-in-twenty tickets sales during the opening weekend were directly influenced by the talker previews, but favourable media coverage linked to the programme is likely to have had an even bigger effect. The case of *Frances Ha* supports the view that talkers' principal benefit is likely to be in generating coverage through sympathetic and supportive media partners:

*'We would always aim to get at least double the cost of the [talker] programmes in media coverage, sometimes much more. This means it's never an additional cost [...] For this film it was about positioning it in media that the distributor couldn't afford to buy in.'*

Kate Bradford, ShowFilmFirst

- Assuming the direct contribution of talkers to the film's box office gross lay somewhere in the region of £3,014 to £14,276, and the cost of associated media coverage was valued at around twice that of the talkers (according to estimates), then this release strategy can be judged cost effective for *Frances Ha*.
- The talker programme did not unduly harm the film's box office performance against projections (by, for example, cannibalising ticket sales), suggesting the campaign was justified in view of the potential risks involved.
- Press reviews, though influential in raising awareness of films, are not always an accurate guide to a title's potential for positive word of mouth. In this case, the views of broadsheet critics proved out of step with mainstream opinion of the film. The unanimity of critical response (there were exceptions, but few in number) was unmatched elsewhere and the film proved more divisive with viewers than anticipated.
- Although the recommendation value of *Frances Ha* proved weaker than expected in the general audience, positive word of mouth was strong among the target group (upscale under 40s in metropolitan areas, particularly London).
- A talker programme can demonstrate a distributor's commitment to a strong title, giving sympathetic exhibitors additional reason to back the film.

*'I think where they do work [is] if you have a film that you know people are going to like, you know people are [...] going to talk about it and they're going to enjoy it. It's a [...] good public relations exercise, and it's a good [...] cinema building exercise [...] It means that when you get to the end of the [opening] week you have really strong figures to back up the desire to get behind the film and get that run.'*

Jason Wood, Curzon Cinemas

- That said, Metrodome's experience with *Frances Ha* confirms the need for talker previews to be properly targeted, and at this scale of release there seems little benefit in booking preview sites unlikely to participate in the opening weekend (as happened with Odeon and Showcase cinemas).

*'What was interesting is that when you put a film with a very singular identity [like *Frances Ha*] into a broad market, you get a lot of negativity as opposed to positivity.'*

Jezz Vernon, Metrodome

*'If you are showing a good film to an audience that is going to appreciate it that is absolutely the best way to spend your money [...] It's got to be the right venues, the right dates [...] Just doing a blanket talker screening in sites where you haven't got that audience, there's not much point.'*

Clare Binns, Picturehouse Cinemas

- Beyond the immediate potential benefit to the distributor's bottom line, hosting talker previews also gives participating exhibitors a value-added experience for audiences and members:

*'We have a huge membership scheme and they have entitlements to see these talker screenings [...] I think they give us an extra incentive to get people to become members. I'm not sure that the distributor, in this case Metrodome, would necessarily feel that benefit, but from our point of view it offers a service, something extra that we can get people to come into our cinemas.'*

Jason Wood, Curzon Cinemas

This research has not exhausted everything that can be said about the value of talker previews for small- and medium-scale specialised film releases. *Frances Ha* was a particular case, with additional attributes of the release campaign in its favour. Further research is necessary to address questions around the impact of talkers on box office performance, in particular whether it is possible to develop guidance for distributors with limited resources to assist in judging the most appropriate level of talker attendances to commission.

In the absence of controlled experiments, much more could be done to build a body of audience survey evidence on the subject, researching the underlying mechanics of the way peer-to-peer recommendations operate for different types of film and release strategy, and building benchmarks against which to compare title-specific results. Companies like ShowFilmFirst have built up a reliable body of audience survey evidence over the course of many talker programmes, but this is not matched by exit poll evidence for talker-led campaigns, and questions about talker influence on opening weekend performance lack much needed industry-wide norms.

Jim Barratt

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# APPENDIX: RESEARCH METHODS

## Methods

Three strands of evidence gathering were employed in researching this Insight Report:

- Desk research

Review of published sources about the film and conditions in the UK exhibition market at the time of the film's release, including trade press articles, published reviews, Metrodome's press book for *Frances Ha*, and online news sites.

- Interviews

Telephone interviews, lasting up to 45 minutes, were held with key players in the release campaign: Jezz Vernon (Managing Director, Metrodome Distribution); Kate Bradford (Director, ShowFilmFirst); Lisa Nicholl (Research Manager, First Movies International); Clare Binns (Director of Programming and Acquisitions, Picturehouse Cinemas); Jason Wood (Director of Programming, Curzon Cinemas).

- Data analysis

Site-by-site box office gross figures, supplied by Rentrak, were collated and analysed for the period from opening weekend to Sunday 3 November 2013, inclusive. Data was generated describing the film's opening weekend and total grosses, and performance in and outside London, by site and circuit, and over time.

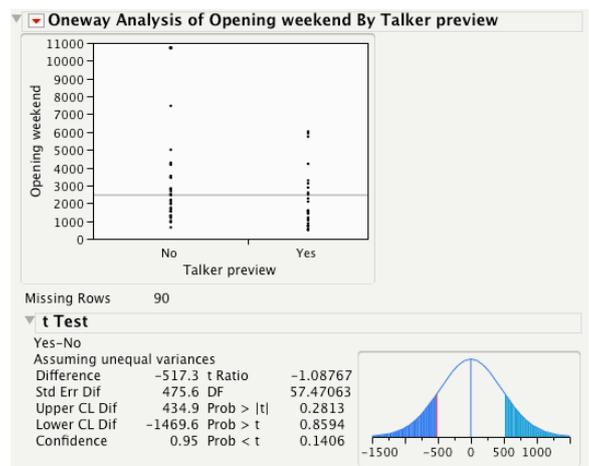
Box office data was also used in conjunction with talker preview attendance figures, organised by site, to

conduct two statistical tests examining the relationship between previews and opening weekend box office performance:

### 1. Relationship between opening weekend box office gross and talker preview occurrence

- *Frances Ha* opened at 60 sites, 26 of which had previously hosted a talker screening while 34 had not.
- An unpaired t Test was applied to this data set, comparing these two groups' opening weekend box office performance.
- The analysis found no statistically significant relationship between opening weekend box office gross and the occurrence of talker previews, even after excluding outliers.

Figure A1: Unpaired t Test results

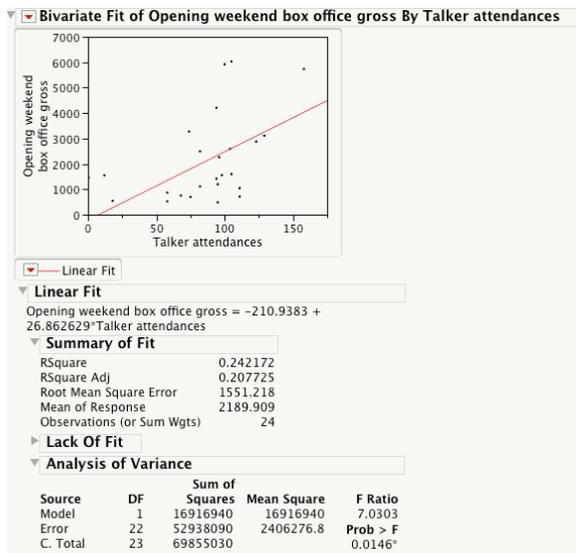


### 2. Relationship between opening weekend box office gross and talker preview attendances

- In order to test whether the size of preview screening attendances bore any relationship with opening weekend box office performance, a bivariate analysis was run using data from 24 sites where talker previews were hosted and the film opened in the first week of release.

- The analysis found evidence of a correlation, such that cinemas with larger preview attendances tended to have stronger opening weekend box office.
- However, this is only a correlation, and does not mean that the size of talker attendances determined opening weekend box office. Sites where the film opened were judged by exhibitors and Metrodome to have the best chance of success with *Frances Ha*, and they were selected for preview screenings for much the same reason. We cannot, therefore, exclude the possibility that one or more other factors were responsible for high talker attendance and opening weekend box office at individual sites.

Figure A2: Bivariate analysis results





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