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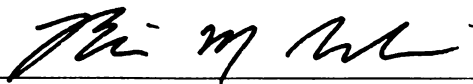
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**THE PROCESS AND METHODOLOGY OF DISTRIBUTING
INDEPENDENT FILMS ON DVD**

By

Jeffrey W. Hamlin

A THESIS

Submitted to
Michigan State University
in partial fulfillment of the requirements
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ABSTRACT

THE PROCESS AND METHODOLOGY OF DISTRIBUTING INDEPENDENT FILMS ON DVD

By

Jeffrey W. Hamlin

Independent filmmaking is currently in a state of crisis and flux. Traditional distributors are no longer acquiring small, independently produced films. This factor has created a shift in the market place, where supply has grown greater than demand.

A solution can be found, however, in the form of self-distributing films on DVD. If approached properly, this method can produce positive results allowing the filmmaker to garner greater market awareness and profits.

This thesis will provide a picture of the current landscape which independent filmmakers face in establishing a market share. In addition, both traditional distribution methods and case studies pertaining to self-distribution of independent films in today's world will be provided. Based upon thesis' findings, the author will design, develop and formulate a distribution plan for his own independent film's DVD.

ACKNOWLEDGMENTS

It is hard to imagine that 10 years ago I was a sailing bum living and sailing throughout the Caribbean. My life was simple and laidback with little in the way of pressure or money. It was a lifestyle that I fully embraced and did not want to give up. Friends and family accepted my whim, but always asked the same question – “what are you going to do with your life?”

I never really gave it too much thought. At the time, I was content living aboard my small boat and scratching out a few dollars. Of importance to me was the next port of call - Cuba, Mexico, the Bahamas, or the Florida Keys. I was driven by wanderlust and the excitement of what lay ahead.

One day, however, something changed. Something happened that caused me to stop cold and think. Perhaps it was one too many storms or the leaky boat cabin or the broken tiller. Whatever it was, I too began to wonder - “what are you going to do with your life?”

While no answers jumped out at me, I began to realize that something needed to change. I needed to find direction - a purpose

– a reason. Slowly, over the course of a year, I seriously examined my life and where I wanted it to go.

One day my dad sent me some literature from Michigan State University. It was from the English program. He included a handwritten note indicating that a career in writing may be just the thing for me. As he put it, I could continue to live the adventuresome life whilst making a living at the same time.

It sounded great! I was so excited that I read the information over and over again. The only foreseeable downside was moving back to Michigan...but with the blessing of my parents (and a free place to stay) I took the plunge. *Thanks Mom and Dad!*

I applied and was accepted into Michigan State University. Upon receiving my acceptance letter, I attended orientation and looked forward to meeting members of the English Department. However, while wondering campus, I took a wrong turn and became hopelessly lost. I ended up asking directions from a curly haired man named Bob Carlisle. As it turns out, he was an advisor for the Telecommunication Department and a fellow sailor to boot.

To make a long story short, I never found the English Department. I followed Bob back to the Communication Arts and Sciences building and officially became a Telecomm student. Instead of writing about my adventures, I would document them on film and videotape. From that moment, my life took on new meaning complete with a sense of being and direction. *Thank you Bob!*

Over the next two years, I worked very hard at finishing my education. Fortunately, the Telecommunication Department offered both excellent facilities and instruction. One such instructor, Dr. Bella Mody, was extremely instrumental in guiding me along the way. She was incredibly caring and helped me identify a method in which I could merge my love of travel with my education. For that, I will always be extremely grateful. *Thank you Dr. Mody!*

To supplement my formal education, I searched for a production related job that would give me 'hands on' experience. When an editing position opened at WKAR television I applied and was given the job. Responsible for my hire was Marge Mooney, a colorful character that would act as my direct supervisor for the

next two years. In that time, I would gain a better understanding of both editing and public television. *Thank you Marge!*

I also took a job at the DMAT lab where I acted as the lab supervisor. The position afforded me the opportunity to learn all about the various production equipment ranging from digital video cameras and XLR cables to non-linear editing suites and patch bays. Thanks to Rich Tibbals and Gary Roettger, I also learned a lot about supervision and teamwork. *Thank you Rich and Gary!*

Upon graduating I took a full time editing job at WKAR television. Over the next two years, I would gain an incredible amount of television production experience ranging from editing, motion graphics, remote videography, lighting, and audio. At one point, I was given complete creative control over two programs; *We Were Known As* and *One on One*. It was the former that afforded me the opportunity to define my editing and motion graphic style, which eventually cumulated into an Emmy nomination.

Of course, I would not have learned nearly as much if it were not for a handful of talented people. I am very thankful to those individuals with whom I most closely worked including Paul

Pierantozzi, Mike Lewis, Dick Best, John Moralez, Rob Burke, and Mike Milhaes. *Thank You Very Much!*

I eventually left WKAR to become a full time graduate student in the Telecommunication Department where I would study Digital Media Design and Technology. Thanks to the kindness of Bob Albers, I landed a teaching assistant position. This afforded me numerous opportunities and I learned much from the experience. *Thanks Bob!*

As a student in the DMAT program, I was fortunate to take a number of classes taught by Brian Winn. His knowledge and dedication to the field of technology and teaching were unsurpassed. He created incredibly positive learning environments enabling every student to prosper and grow. I am very thankful for all of his help and guidance. *Thank you Brian!*

Taking the time to serve on my thesis committee were Brian Winn, Gary Reid, and Bob Albers. I am thankful for all of their input and willingness to serve. *Thank you!*

Of course, I could not have done anything without the loving support of my wonderful parents, Thomas and Susan. To them, I will be eternally thankful. *Thanks mom and dad!* I am also very thankful and appreciative of my lovely wife Jolee. She is the bedrock that continues to support me to this day. Her kindness, friendship, gentle spirit and enduring love have kept me going through the good and bad. *Thanks JoJo!* Thanks also to my pride and joy Harrison, who cannot wait for Daddy to finish his thesis so that we can play outside together. Finally, thanks to little Hope who is busy growing in mommy's tummy. *I love you one and all!*

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CHAPTER ONE

BACKGROUND

In the spring of 2002, I premiered my independent documentary film, *Finding Fidel, A Young Man's Journey*, on the campus of Michigan State University. The event, which was sponsored by the East Lansing Film Festival and Kresge Art Museum, drew more than 150 people and was covered extensively by print and television local media, including front-page coverage in the *State News*. The excitement surrounding the film and its premiere drew a highly captivated audience. Upon completion of the film, nearly everyone stuck around for an hour Q and A session that led to a line of people wanting to discuss everything from cinematography to wanderlust to politics with the filmmaker.

In and of itself, the reviews and positive attention were enjoyable and quite validating. But I soon came to realize that I had I had done myself a disservice by doing nothing to carry on any momentum of the moment. For example, many interested parties wanted to purchase a copy of the film, but none were available. No contact cards were on hand, and no website information was passed along. When the event ended, patrons left with nothing in hand and

nothing that would bring them back for more, keeping them abreast of the filmmaker's future projects.

Such was the position I found myself in, or more correctly, the position I put myself in. I was so wrapped up in the creative aspect of filmmaking that I never appropriately identified the importance of self-promotion, marketing, branding, and distribution. When a golden opportunity arose, I was ill prepared to take advantage of it. I left the experience wondering what had gone wrong, particularly since it seemed as if the event went well. Therein lies the context in which this thesis was undertaken.

Like the presentation, the undertaking of the film (*Finding Fidel, A Young Man's Journey*) itself was at best an ill conceived and thought out endeavor. When I began filming, I never envisioned that my footage would be used to create a film. Consequently, I filmed in a haphazard manner. I did not consider a script or develop a concept, clear or otherwise, of future use of the footage. I was filming "for fun," and mere entertainment. I never put myself on camera, and I never treated myself as the subject. I filmed whatever was of interest to me over a six-year timeframe, never following a story line per say. Of course, the overall plot of the film ended up being my search for Fidel

Castro, but while filming, I never actually or concretely identified that concept as the basis for a future film. Not until I returned to the states and a college setting did I decide to use the footage for a class project. Even at that point, I had not differentiated between using the footage for the comparatively simple task of developing an undergraduate class project versus that of making a feature-length documentary to increase personal livelihood and edification.

Still, as it worked out, I filmed everything I needed for the making of a film. Whether it was dumb luck or some guttural knowledge of filmmaking, my footage all ended up coming together into a coherent cinema verite' style documentary. Seeing everything come together helped convince me that I have a story to tell, and perhaps a talent in which to tell it, too. But, it would be a long while before I realized the all-important concepts of marketing and distributing the creative work or before I would see how these tasks should be at the forefront of a creative filmmaking venture, not allotted to a secondary or non-existent position, as I had treated them. Again, the learning experience laid the foundation for this thesis.

CHAPTER TWO

OVERVIEW

Every aspiring independent filmmaker dreams of having his or her work shown on the “big screen.” Bringing this dream to fruition, however, never truly happens without some sort of distribution deal. Ultra low budget films such as *Clerks*, *El Mariachi*, and *The Blair Witch Project* are recognizable examples of this notion. Each of these films had established small scale success; however, without distribution contracts, the broader viewing public never would have been able to watch these inventive independent films. The unique outcome for these films directly relates to the fact that a major Hollywood studio picked them up for national theatrical distribution.

While *Clerks*, *El Mariachi*, and *The Blair Witch Project* are highly successful independently produced films, they are the exception. The truth of the matter is that most independent films will never be picked up for distribution. The principle factor is that the former titans of the independent film world, the Miramax’s and the Artisans, have all but stopped taking risks. They essentially have ceased acquiring small movies from emerging filmmakers. “It’s times like these when we are all reminded that this is the film business. The Kevin Smiths [*Clerks*]

of tomorrow are simply going undiscovered as their little \$30,000 low-budget independents join the mass of *Cine-Orphans*, basically films without a home – movies without distribution” (Gore).

This is sobering news considering that nearly four thousand independent films were produced in 2002 alone (Bosko 153). The saturated market finds struggling filmmakers throughout the country desperate to secure a profit making deal (preferably, high profit) and see that their film reaches the big screen and commercial marketplace in theaters. The chances of this happening, however, are slim to none. “It is almost impossible to get a theatrical audience [for independently made films],” states Lloyd Kaufman, president of Troma Films. “The Hollywood studios see to that. They control the game, they have the money, and they strongly prefer to push their own lousy movies.”

Ultimately then, desperation prompts many independent filmmakers to all but give away their artistic creation. They may have been holding out for the best “deal,” but at a certain point, when it looks as if the film may *never* sell, it no longer is a matter of breaking even, making a profit, or choosing between various pleasant options. By necessity, it becomes about the filmmaker’s ability to get on someone’s radar – or, in other words, to get some exposure. In

essence, the exposure itself serves as a stepping-stone in launching the filmmaker's career.

The introduction of DVD technology provides a new beacon of hope for independent filmmakers struggling to achieve successful distribution of their product. Truly, the technology is changing both the entertainment industry and the future of filmmaking. As Lloyd Kaufman states "DVDs have made independent film much more accessible to the viewing public and given the power back to the filmmakers. DVDs are going to change the whole game, and for the better." Chris Gore, editor of Filmthreat.com agrees, "The time is ripe for a revolution in independent film and the answer lies in three little letters... D-V-D."

DVDs (Digital Video Disk/Digital Versatile Disk) have been on the market since 1994. At the time, several competing formats were bidding for market share and acceptance. Slowly, common standards were established. As the technology became standardized, the entertainment industry began to realize the format's full potential. One single-sided, single-layered DVD could hold 4.7GB of material. This equated into 133 minutes of full motion MPEG-2 video, enough space

to contain 95% of all Hollywood movies. In addition, the picture quality is greater and the playback ability is more enhanced than VHS.

DVDs furthermore have had a vast impact on the marketing, sales and distribution of both studio and independently produced films. The harsh reality is that it is increasingly difficult for independents to turn a profit in the theatrical distribution market. Even the major studios have come to accept the fact that 4 out of 5, or 80 %, of their pictures will lose money in the course of their theatrical runs (Simens pg. 359). Marketing costs to take a film to thousands of screens are astronomical; however, even lackluster theatrical performance of studio produced pictures helps in marketing for the home release of DVD and VHS that inevitably follows. As such, theatrical releases are more often than not being looked on as mainly a way to promote and market the upcoming DVD. In fact, 2001 was the first year in which DVD sales eclipsed the total box office take of all films released to theaters (Bosko 243).

In today's market, DVDs are more popular than ever before. People from all walks of life are buying and using the technology. According to research presented by the DVD Entertainment Group, an industry trade organization, 60 million homes were expected to have

DVD players by the end of 2003. Of that number, 29 % would have at least two players in the home. In addition, 69 % of homes with game systems have watched DVDs on their game consoles and 59 % of homes with DVD enhanced computers have watched a movie using the PC (Hernandez).

One of the primary factors that enable DVDs to continue their gain of market share relates to their pricing structure. DVDs were introduced at sell through price allowing them to blast their way into the marketplace, blurring the once clear lines between retail product and rental product. In today's market, sell through price finds DVDs often cheaper to buy than rent. As such, the average DVD household buys about 15 titles per year, more than double the level of VHS purchases, even at the height of that medium's sales success.

Another reason for the popularity of DVDs is the flexibility offered by the format. They afford the consumer the opportunity to watch a film on a variety of machines, including a traditional DVD player, a computer, or even a DVD enabled game console. They also allow for many of "extras" to be viewed on one, self-paced interactive disk. Besides the actual film, DVDs this often include behind the scenes documentaries, interviews with filmmakers, outtakes, games,

and much more. This feature has exceptional appeal to film buffs and other niche audiences that now are able to explore their esoteric hobbies and interests in a much more flexible and interactive way.

Accordingly, DVDs have become highly collectable. For home use, they are highly durable and last a long time, and they have a high re-sale value. Creative artwork and additional inserts add further value to the product and are most commonly found in "Collector's and Platinum Editions." Ted Sorrandos, acquisition director of Netflix.com, finds that DVDs have become likened to baseball cards of the old days. "DVDs are traded extensively and have intrinsic value outside of the actual film. Their size allows them to be shipped across the country in quantity as collectors from all over trade and barter their favorite titles."

The location in which DVDs are sold is yet another aspect impacting their popularity. In today's market, you will find DVDs on sale at grocery stores, convenience stores, truck stops, and gift shops. They are set up in displays to create a state of impulse buying. In the very recent past, buyers would not have seen DVDs or videos for sale in these establishments. Grocery stores, gift shops and the like were not in the business of selling movies. Customers had to go to a

specialty shop to buy videos/films. Not any more. As Lloyd Kaufman states, "Although it is still extremely difficult for our films to get shelf space in major retailers, we do sell lots of product in big chains such as Best Buy, Musicland, and Wal-Mart." Don May of Synapse films sees the popularity and accessibility of the DVD format as having a huge impact on the independent filmmaking industry. "I believe DVD has really helped the indie scene," he says. "I walk into stores like Best Buy and see loads of smaller, more independent films on the shelves every day. DVD is catching on like wildfire and the sell-through price and availability has allowed for independent filmmakers to really showcase their material into outlets like never before."

As this trend continues, a handful of small distribution companies are re-releasing previously undiscovered independent films on DVD. Companies like Troma, Synapse Films, Indie DVD, and York Entertainment are taking the lead and getting their products to the market. By establishing brand names and keeping up with industry trends, these small independent distribution companies are able to gain shelf space in the major retailers. *Drawing Flies*, *Toxic Avenger*, and *Star Warp'd* are a few of the most successful titles, and all have sold over 35,000 units worldwide (Gore).

This example provides a rare instance in which Hollywood actually followed the lead of trailblazing independent filmmakers by re-releasing both current and classic studio owned films. It is the ladder that is making the most noticeable splash on the industry. The re-release of classics now is seen by many in the entertainment industry as the bread-and-butter stash, often keeping studios sailing during the slow times of the year or in between new releases. "I think the classic DVD market is key to the growth of the format." Says Bob Chapek, President of Buena Vista Home Entertainment. Joe Amodie, USA Home Entertainment executive vice president agrees. "We really look at classic films as being extremely important for our revenue stream. It compliments our new-release market and it makes the collection of movies easier. It keeps collecting alive." Titles such as *Gone with the Wind*, *Citizen Kane*, *Casablanca*, *Ben Hur*, and *Cleopatra* are popular re-releases and have opened up new target audiences, primarily the over 40 crowd (Gore).

As Hollywood and independent distributors strive for DVD market share, a handful of independent filmmakers are tackling the challenge of distributing their products directly. In itself, this is a revolutionary consideration. Distribution remains a highly specialized area of expertise. It is time, labor, money, and mentally intensive. Traditional

distributors have established contacts, formulas, marketing resources and plans, in addition to a beneficial, self-serving expertise in contract negotiation. As such, the process itself of self-distributing has understandably scared away independent filmmakers, who tend to prefer remaining focused on their creative works rather than centering on the intricacies of business plans and market research.

Still, for an independent filmmaker to reach any semblance of profit making success, he/she must face the reality that distribution is paramount, regardless of the decision to self- or studio-distribute. Both the literature and the author's own experiences irrefutably confirm this position. The assertion formulates a basis for the forthcoming thesis. A close examination will follow, including a literature review of traditional distribution models, and an assessment of both the challenges and benefits of self-distribution. The unique attributes of distributing independently made films, specifically in the DVD format, also will be scrutinized.

In summary, DVDs have expanded the market place for both mainstream studio movies and independents alike. Unlike the mainstream Hollywood system, however, independent filmmakers do not have built in distribution channels or seemingly endless supplies of

cash. Their success, if they are to achieve it, depends on identifying new and innovative ways of distributing their films (DVD's) to the viewing public.

CHAPTER THREE

DISTRIBUTION

From the onset of the motion picture industry, the distribution process has been a vital link between filmmakers/studios and their audience. It is, after all, the process by which films are physically placed before the viewing public. Traditionally, distribution has entailed taking a finished film and getting it into the nation's various movie theatres. Today, however, distribution has gone global. Distributors find themselves attempting to get films to a worldwide audience by utilizing every conceivable form of media available. The home video/DVD market, broadcast and cable television, video on demand, and pay per view are but a few of the markets that distributors aim to fill.

On the surface, the distribution process may seem to be a relatively straightforward process. It is, however, a highly specialized endeavor that is time, labor, and money intensive, with a seemingly endless stream of administrative tasks involved, including deal making, contract negotiation, quality inspections, collection management, etc. Other intricacies to film distribution entail variables

such as geography, season and demographics of target audience, (Sherman 68).

Due to the nature of the business, therefore, distribution has typically been left to those studios or individuals with a large bankrolls and connections within the entertainment industry. Distributors (as they are known) make it their business to take on the financially risky task of delivering films to the viewing public. Distributors have become the de facto gatekeepers of the industry. Without them, a film typically has no chance to gain an audience. The industry has come to rely on their expertise, trusting that they can deliver on the promises they make. Most importantly, experience has taught distributors what sells, what doesn't, when to sell, and to whom to sell.

Working with an established distributor has definite advantages for filmmakers the world over, who tend to seek their services. Distributors have resources, both financial and otherwise, that they use to get a film to market. They have both the clout and leverage within the industry and can command for superior release dates, low cost prints, and marquee theatres in the most desirable cities. Distributors are key to the economics of filmmaking as they help

ensure that payment is collected and dispersed among all the significant players (Cones 44).

Types of Distributors

Distributors can generally be categorized into four groups -- studio, independent, sub, and wholesale. Studios are the largest distributor group, and they have the most resources at their disposal. Sub distributors, on the other hand, are often small agencies employing as few as 5 people. While distributors may vary in size and scope, however, the purpose of each is the same: to make a completed film available to the markets and venues that may wish to sell or exhibit it in exchange for an agreed upon portion of the revenues (Sherman 67).

Studio

These are the big Hollywood players such as Metro-Goldwyn-Mayer, Warner Brothers, Universal Studios, Twentieth Century Fox, Sony Pictures Entertainment, Walt Disney Studios (Buena Vista) and Paramount Pictures. They are extremely large corporations with huge operating budgets and offices/staff both nationally and internationally. Studio distributors, sometimes referred to as "majors," are the most established and revered in the business, as they have been around

since the advent of the motion picture industry. Their primary function is to release their own product, that is, distribute the films made within their own studios (Harmon 22).

In a process called direct distribution, the studios work directly with the large theatre groups across the country and place movies produced under their trademark on as many screens as possible. Because they are so powerful within the industry, studios usually have no problem arranging for screen space at whatever theatre they seek.

However, the number of in-house films that a studio can produce each year is limited, usually around 10 to 15 (Sherman 69). Therefore, they often seek to distribute films which have been produced by other than their production facility. Many times this entails collaboration with another major studio, or in some cases, an independent filmmaker.

When distributing an externally produced film, many of the studios use a specialty releasing label, or subsidiary distributor of the parent company. For example, Fox Searchlight is Twentieth Century Fox's branch for independent product offerings including such films as the *Full Monty*, *Antwone Fisher*, and *One Hour Photo*. Another example

is Fine Line, the independent branch of New Line Cinema, which distributed *Hoop Dreams*, *Shine*, and *Gummo*.

Through both the size of the companies and the scale of productions released into the market place, studio distributors command the industry. Most have long histories in the business and are very efficient at getting product into every possible market and territory. Studio distributors usually deal with all other kinds of distributor to locate and release a steady stream of films (Bosko 70).

Independent Distributors

Independent distributors operate independently of the traditional Hollywood studio system, yet they seek to accomplish the same task: to deliver films to the viewing public. Unlike their studio counterparts, however, independents have limited financial and personnel resources. Because of this, independents tend to shy away from competing with studios by focusing their efforts on locating and meeting the needs of niche markets.

By embracing the niche market philosophy, independent companies such as Lions Gate, Troma Entertainment, York Entertainment, Synapse Films, and Regent Entertainment have thrived

in the distribution business. Their very names have become synonymous with the genre they are representing. As a result, the market knows what to expect from each of their releases. Lloyd Kaufman explains, "When people hear the name Troma they automatically know what to expect...bad acting, gore, blood, cheesy effects, and lots and lots of T and A" (Kaufman).

The majority of independent distributors choose to specialize in specific genres like horror, sci-fi, and action. York Entertainment, for example, focuses its efforts on releasing urban action flicks. With titles like *Thrill Seekers* and *Random Acts of Violence*, York has become the worldwide leader in urban entertainment releasing more feature films annually than any other independent distributor (Gore).

Another successful independent distributor is Synapse Films. Based in Detroit, Michigan, Synapse specializes in distributing sci-fi and horror flicks. They purchase approximately ten films a year and distribute them to niche markets through the web, magazines, and video stores. One of their biggest titles is *Star Warp'd*, an animated short film parodying sci-fi hits like *Star Wars*, *X-Files*, and *Star Trek* (May).

Like the large studio operations, many independents also finance, produce, and distribute their own product. The most notable example is Troma Entertainment. Based in New York City, Troma has produced over 100 films with titles like the *Toxic Avenger*, *Citizen Toxie*, *Tromeo and Juliet*, and *Sgt. Kabukiman NYPD*. These low budget horror movies are distributed to an international audience, and they enjoy a cult following. Troma has released many of its films in regional theatres, but it mainly relies upon the video/DVD market for profits (Kaufman).

Sub Distributors

Sub distributors are unique in that they do not produce any films, and they rarely acquire the rights. They are, in fact, middlemen. Their sole purpose is to work with studio, independent and/or self-distributors in finding niche, foreign, geographical, and retail markets. They primarily serve as sales agents working on a commission-based contact.

Many distributors specifically choose to work with a sub distributor when attempting to sell a film abroad. By understanding international policies and practices, sub distributors can cut through the traditional red tape and get a film into almost any foreign market.

They are used extensively, for example, at the Cannes, Milan, London, Munich, Bombay, and Johannesburg film festival markets (Harmon 29). While in attendance, they represent films by holding screenings for prospective buyers and distributing all the ancillary information pertaining to a particular movie. The sub distributor then will receive a commission if any the film receives any sales, based on the price of the sale.

Wholesale Distributors

Wholesale distributors are interested only in selling to the DVD/VHS market, as opposed to direct theatrical release. Wholesale distributors can be categorized into four distinct groups according to their products and services -- adult, new product, used product, and leased product. Distribution wholesalers move large quantities of product from suppliers to stores. Suppliers can be studios, independent producers, video stores, or anyone who has a large inventory of product to sell.

Adult wholesalers deal with adult themed programming including both soft and hard-core pornography. Because of the controversial nature of the business fraught with potential for lawsuit, distributors of adult wholesale materials make it their business to understand federal,

state, and local regulations describing how and where their product can be distributed and displayed. International law also must be considered since they distribute their product to a worldwide audience. Nonetheless, if adult wholesalers operate within the parameters of the law, they stand to reap substantial revenues. The demand for their product has risen dramatically over the past five years and is expected to continue to rise (Bosko 73).

An adult wholesaler will obtain product by one of two ways. First, they may choose to work with an established production company specializing in the creation of X-rated material. Because this option gives the wholesaler a great deal of control concerning the number of pieces ordered, titles, formats, and genres, it is the most popular acquisition technique. Adult wholesalers also might obtain bulk product from a fledging video store or production company looking to liquidate its assets. While this method can produce mass inventory at a very low price, it leaves the adult wholesaler with little variety. Also, because much of the material may be used or previously viewed, they may have to repackage it and sell it at a reduced price (Bosko 73).

New product wholesalers are the bread and butter of the home entertainment industry. Companies like Ingram, Baker and Taylor, and

Video Products Distributors provide retailers and video rental stores with access to thousands of videos and DVDs. Included in their list are titles released by Hollywood studios, independent film and video companies, and additional producers of movies, fitness, instructional, educational, and do it yourself which have not utilized a theatrical release. New product wholesalers do not sell directly to the public; they only operate in a business-to-business manner. In addition to offering tapes and DVD's, many new product wholesalers provide additional service to their customers like web site design and maintenance, poster packages, and other sales/rental enhancing marketing and merchandising tools (Bosko 74).

Used product wholesalers concentrate their efforts on buying and selling used videos and DVDs. Specializing in closeouts, they do enormous liquidations from video store facilities, video duplicators, mass merchants and, on occasion, Hollywood studios. In these deals, videos and DVDs can be retail returns, overruns, discontinued items, and cutouts with quantities usually reaching into the thousands. Also known as "secondary distributors," used product wholesalers cater to a niche market such as dollar chains, truck stops, rackers, warehouse clubs, and flea markets. A Florida based company called Distribution Video and Audio, specializes in distribution to government and military

installations including their equivalent of “public libraries”, governmental agency libraries, embassies, and domestic and foreign bases. In 2002, the company moved over ten million tapes (Bosko 74).

Leased product wholesalers operate through a revenue sharing model called *pay per transaction*, or PPT. Using the PPT system, more than 10,000 video outlets throughout North America acquire videocassettes and DVDs from major studios and other suppliers at a much lower cost in return for sharing a portion of their rental revenue with the supplier. In this set up, a retailer will pay anywhere from \$0 to \$8 upfront for the same movie or video that would have cost up to \$65 from a traditional supplier. After all fees and splits, the retailer keeps about 50% of the rental revenue (Bosko 76). This system is very popular with small video stores because lower cassette costs allow for less risk, quicker “breakeven,” and greater cash flow.

Distribution Markets

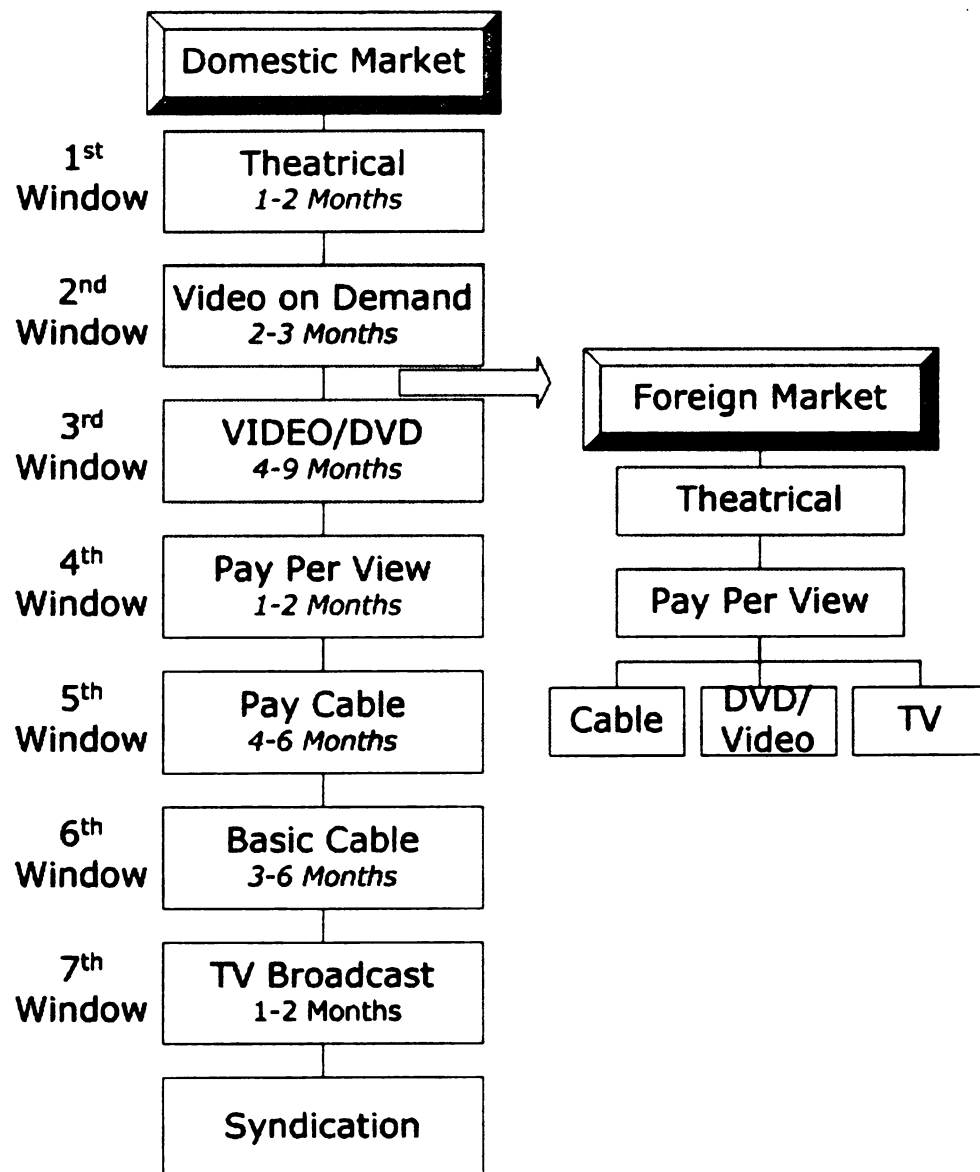
In today’s market, every conceivable market venue wants access to movies and their revenue. From television networks to basic cable companies, video stores, and theatre groups, the list of outlets is ever growing and changing. As the list grows, the demand for program

content (films) becomes even greater. The demand, however, is not only for content, but also for exclusivity. Exclusivity allows a particular market to acquire revenues from the screening, renting, or selling of movies for their specific industry within a specific timeframe (for example, a television network broadcast, as opposed to a video store rental) (Simens 357). Granting exclusivity not only allows a particular market to gather revenues, but the distributor and producers of the film also may benefit financially. It is, after all, a symbiotic relationship in which all parties are guaranteed to collect revenue if exclusivity is maintained contractually.

To assure exclusivity, distributors will release films in a particular order to various different markets. This process is called “ordered selling” and is based upon a specific release hierarchy to ensure maximum profitability from the overall entertainment marketplace. The order of release follows a pattern, and most markets are designated with a window. In all there are seven windows; theatrical, Video on Demand, Video/DVD release, pay per view, pay cable, standard cable, and television broadcast (See Figure 1). Each window maintains an agreed upon timeframe, in which each stakeholder maintains the rights to sell, rent, or exhibit the film (Cones 143). Upon reaching each of these windows, distributors are apt to approach a

handful of markets that fall outside of the windows, but which have a proven track record of purchasing and product interest. These markets include public libraries and other institutions, schools/universities. direct internet sales, and broadcast syndication.

Figure 1: Ordered Selling



As stated, if windows are orderly maintained, then each successive window should have ample opportunity to reap revenue. If ordered selling is not kept, and a window is offered exclusivity at random, then the revenue model is shattered, and the distributor will lose a lot of money. It will also prevent windows higher on the flowchart from a chance at collecting their share of the revenues.

Theatrical

In the grand scheme of things, most filmmakers and distributors seek theatrical distribution as the first outlet for the movie. They see this as the best opportunity to recoup on a film's cost and reap a profit. Theatrical distribution, however, can be extremely risky. High costs of advertising, promotion, prints, and theatre rentals make the chance profit relatively low. Even major Hollywood studios lose money on 80 percent of their yearly releases (Simens 359). The one or two blockbusters that make huge profits are counted on to carry the other, less profitable movies. If a film is to see a theatrical release, it is up to the distributor to design and implement the marketing plan. This includes market research, poster work, creating TV/radio advertisement and trailers, establishing a web presence, and anything else needed to promote the film.

Next, the distributor works on booking theatres. Theatres range from national first run chains, which normally only show Hollywood products, to smaller independent and art house theatres specializing in independent and foreign films. When booking a theatre, a distributor will work with the theatre owner (exhibitor) to arrange all the specifics. The national chains have a central office while art house theatres typically have a local owner. In both cases, the distributor and exhibitor will work out a financial contract to deal with the box office sales. Various types of exhibitor/distributor deals exist. One of the most common is the 90/10 deal. In this instance, all of the box office gross is given to the exhibitor until his costs are covered. Then, the distributor gets 90 % of the remaining profits, and the exhibitor gets 10%. In another arrangement, the exhibitor pays the distributor an agreed upon minimum (floor) dollar amount, or a flat percentage of the box office revenue. As a ballpark figure for all films, the distributor will get about half the box office gross. For independent films, this usually amounts to 35 to 40 percent (Goodell 352).

While a theatrical release is usually a money-losing venture, the process still plays a crucial role in the overall distribution process. A theatrical release will raise the price of a film when it eventually is released to other markets such as video on demand, pay per view,

video/DVD market, etc (Weise 226). The theatrical release also gives the filmmaker a boost in his credentials, so that he can garner more funds for his next project.

Video On Demand

There are approximately 110 million homes or apartments in the U.S. equipped with a television. Of that number, 90 million subscribe to a cable or satellite service (80% cable penetration) (Whitney).

Video on demand is identical to the in room movie service found in many hotels, only now it is available in the consumer's home. Viewers can watch a variety of programs including new movies, favorite television programs, concerts, and sports exactly when they want.

New technology even allows the viewer to pause, rewind, restart, and fast-forward at any time. Like pay per view, niche markets are an increasing focus of many VOD operators, as the service allows for economical delivery of specialty programming to a broad audience.

Video/DVD

Home video distribution refers to selling videos/DVD's either directly to consumers, to wholesale and retail sales outlets, or to video stores that rent videos to consumers. Some movies are made specifically with this market in mind, but when others go direct to

video, this is a sign of failure to find theatrical or other distribution success. Videos/DVDs are generally released in two stages. First they are sold at higher prices (\$50-\$150) to video stores who in turn rent them to costumers (rental price). After a period of several months, the price is then dropped to a lower level (\$10-\$19) so consumers will purchase videos/DVDs directly for home use (sell through price) (Goodell 372).

In the past two years, there has been a downward pressure on prices due to the inundation of DVD market. Studios have dumped thousands of titles on the market in places like Best Buy, Wal-Mart, Musicland, and Circuit City. By introducing DVDs with a very low sell through price (usually below \$18), many consumers have been more apt to buy than rent (Gore).

Pay per view

Pay per view was created for consumers to watch a movie or special event without leaving their home. Available through all traditional and digital cable systems and satellite television, pay per view usually is available on at least six, and sometimes as many as 25 or more, channels on a system. Consisting of mostly new movies, sporting events, wrestling, adult oriented programs, and music

concerts, pay per view is available 24 hours a day. The largest players in the PPV field are Encore, inDEMAND, Playboy TV, Spice, and Starz (Stanley). These companies have partnerships with major Hollywood studios and get most of their contents due to those relationships; however, they also examine more niche-oriented markets and look to independent suppliers to fulfill at least a portion of their programming needs.

Cable Markets (CATV)

With more than 280 national, regional, and local stations, cable TV may provide the best opportunity for the independent film/video producers. CATV began in 1948 as an alternative television service for households where reception of over the air TV signals was poor. Cable television now has expanded into a multi-billion dollar industry serving more than 70% of the U.S. television market. Today's broadband infrastructure provides the ideal pipeline for delivery of new and advanced services including digital networks, video-on-demand, interactive television, high-speed internet access, and telephony.

National cable networks such as TBS, Discovery, and TLC rely heavily on originally produced programming. Reaching upwards of 86 million subscribers, the top 25 cable networks work with syndicated

package suppliers to provide a vast and diverse array of programs (Bosko 133). Though many of the cable networks support broad genres, specialty programming is increasingly popular. Specialized networks have seen tremendous growth and now fill the 500+ channel capacity of most providers. Some of the specialty networks and channels include: American Legal Network, Animal Planet, Black Entertainment Television, Boating Channel, Collectors channel, Hip Hop channel, Outdoor channel, and the Sundance channel.

Broadcast

In terms of audience size, no other means of distribution comes close to that of TV. With millions of viewers tuning in each day, even an unpopular program will have viewers. Filmmakers often complain that the type of programming on TV is too conservative and fairly uniform; compared with theatrical distribution, however, TV is a remarkably democratic medium (Ascher 558). TV viewers will tune in to many types of programs including public affairs, documentaries, nature, and dramas, all of which they probably would not go to a theatre and pay additional funds to watch.

For the purpose of distribution, the broadcast market consists of three areas: network affiliates, UHF/LPTV, and PBS. None of the

national networks (ABC, CBS, NBC, FOX, UPN, WB) buy independent films or videos. They all create their own programming or get product access through high level studio deals.

Network affiliates are local channels that carry network programming. They have time slots open for additional programming, although the slots tend to be the least sought-after (usually very late at night or early in the morning). Network affiliates do work with independent producers in a limited capacity.

UHF stations will acquire product for air, but in a limited capacity. Like Network affiliates, most of their open time slots are late at night and early in the morning. Many UHF stations are part of a consortium owned by companies like Infinity Broadcasting and Clear Channel. Programmers at these stations are often willing to work with independent film and video makers for one time shot arrangements. Series programming (hunting, fishing, cooking, home improvement) sells best because it offers the programmers an opportunity to build an audience.

LPTV is similar to UHF except that its signal is only transmitted a short distance. They serve small communities by offering a mix of

locally originated productions and low costs syndicated shows. A 24-hour a day, general entertainment company specializing in family oriented programming, American One provides many of the syndicated shows. The company works with over 130 stations nationwide (Americaone.com).

Created in 1969 to air publicly created and themed programming, Public Broadcasting Service (PBS) has grown to compete with other networks in providing high quality programming in a non-commercial environment. Based in Alexandria, Virginia, the private, non-profit media enterprise is owned and operated by the nation's 349 public television stations. They deliver quality programs and educational services to approximately 99% of the American market (Gregory 102). As competition with the commercial stations heats up, PBS has gotten very selective with regards to the programs that it is willing to air. While programs such as POV, Frontline, Independent Lens and Nova do purchase independent productions, their standards are incredibly high, and seemingly unreachable for many independent filmmakers.

Institutional

The institutional market is comprised of schools, universities, libraries, and a wide slew of other organizations including prisons, corporations, and churches. The diversity of this market entails attraction to different audiences, many of which are interested in learning, teaching, and examining subject matter or issues relevant to the group's beliefs or reason for being. (Bosko 171) Therefore, independent productions concerning very specific topics or specialized, esoteric interests, hobbies, cultures, geography, or individuals, are perfect fits for distribution within institutional systems.

Schools/Universities – Across the country, videos/DVDs are playing a bigger and bigger role in education. Depending on the class and grade level, instructional, educational, and informational programming is used to enhance the learning experience. This market can be further defined by region (local, state, national), audience served (pre, elementary, middle and high school, undergraduate and graduate colleges), and subject matter (academics, social skill, athletics, special interest). A system of specialized educational distributors serves much of this market (i.e., www.teachersvideos.com). These businesses acquire products through a network of independent suppliers, and sell to schools and

universities with a combination of catalog, on-line, personal calling, and relationship establishing approaches (Gregory 90).

Libraries – Sometimes referred to as another home video market since patrons can borrow videos/DVDs along with books, libraries present the independent film and video maker an accessible and supportive outlet for their work. Libraries get videos and DVDs from specialty distributors serving their market. Taking into account the buyer's needs, direction, budget, and taste, programming is selected and purchased on a fairly regular basis. Approved distributors make up the bulk of video and DVD sales to this market, although the independent trade is very brisk.

Many successful independents have sold their work directly to libraries, if only on a small scale. Perhaps the film offers local interest because of its shooting location, cast or crew. The film also may appeal to libraries seeking to fulfill their dedication to the promotion of the local arts. Most regional libraries house extensive collections books both written about the area and by authors from the area. The same holds true for independent films and videos. Libraries also tend to be accommodating when it comes to hosting screenings (including the

after screening sales opportunities), particularly if the film has local interest.

Prisons, organizations, corporations, and other institutions – In addition to schools, universities, and libraries, a number of other institutions exist that are viable candidates for videos and DVDs. The highly populated prison system is just one example. Entertainment, educational, and instructional films and videos are brought into facilities for a rental fee. Distributors acquire most of their product from Hollywood studios, as blockbusters prove to be the most popular choice with this audience; however, independent fare (both features and instructional products) has gained an increased presence, especially in minimum-security environments where inmates have more freedom and access to entertainment (Sherman 91).

After school daycare, senior centers, churches, mental health centers, hospitals, and community recreation centers are other institutional markets aggressively utilizing video to serve their clients.

Professional and/or Social Organizations – Too numerous to count, organizations are always looking for entertainment, enrichment, or education to share with their members. Independent videos/DVDs

dealing with subject matter close to the group's interests or goals usually is well received and used in a number of ways. The material can be bought for a public showing, listed for sale in a group's newsletter, or offered at a meeting. Some specialty independent distributors exist to serve extremely defined segments like hunting videos to sportsmen's groups, nature tapes to environmental clubs, and war videos to veteran's associations. As with some other niches of the institutional market, no official way of doing business is established currently (Ascher 559).

Corporations – The corporate environment is another market segment utilizing video in its day-to-day operations. Buying and renting videos/DVDs mostly for training purposes, companies are always on the look out for new and improved ways to work, to teach employees various aspects of managing work, and to orient new hires in the workplace. The corporate market is mostly served through a variety of suppliers including specialty distributors and independent sellers. Most products are purchased through mail and on-line ordering.

Non-Theatrical – Often called A/V distribution, projects made specifically for educational, institutional, and/or corporations are

considered non-theatrical releases. These include training videos, curriculum aides, and instructional material. Non-theatrical distribution is a specialty business with some companies doing this exclusively. Midwest Tapes, for example, specializes in getting videos and DVDs into the nation's libraries. Some theatrical distributors have a non-theatrical division, while others contract with sub distributors to handle non-theatrical releases (Bosko, 119).

Internet

In the past couple of years, the internet has become one of the most important venues in the distribution process. Films are both rented and sold directly to consumers through the internet. Studios, independents, and filmmakers have all taken to World Wide Web. Some, like Synapse Films choose to sell films from a dedicated website. Others, like Universal and Miramax, sell their product to Netflix. Netflix is the leading U.S. online DVD renter, commanding about a 95 % share of the market (Sorrandos). It makes money by charging a monthly fee and directly shipping DVDs to customers, who make their rental choices on-line. Recently, the U.S. Patent & Trademark Office issued Netflix a patent that covers its on-line subscription service.

Distributor Functions

The ultimate goal of a motion picture distributor is to get a film before a paying audience. In executing this task, a distributor must perform a variety of functions ranging from film acquisition and promotion to revenue collections and market research. By their very nature, these functions are time, money and labor intensive. As such, it is important to note that every decision distributors make in getting a film to market is based upon that film's potential profitability.

Distributors are in the business of making money and will not acquire a film for its beauty or other artful qualities. *Their sole motivation is financial!*

One of the first functions a distributor aims to fulfill, therefore, is film acquisition. Because the market demands a constant supply of new films, distributors are always on the lookout for the next big hit. To determine desirable films for acquisition, distributors spend a lot of time and money searching. Both studio and independent distributors attend competitive film festivals where they court organizers, solicit buyers, promote projects, arrange sales, and hopefully acquire the next blockbuster film. *The Blair Witch Project* is the most notable example of an independent film that was signed to a distribution deal after being viewed at a film festival (Gore 131). It was perceived by

distributors as a marketable film, and went on to become a high grossing hit. When searching for films, marketability is a key area in which decisions are based.

The marketability of a film is based on both objective and subjective criteria such as genre, production quality, violence, the presence and/or absence of stars, sexual content, program length, soundtrack, market conditions, director, MPAA rating, etc (Rosen 227). If a distributor believes that a film is marketable and henceforth profitable, he will offer a contract to the producers/filmmakers, and the distribution process will begin in earnest.

When the distribution process begins, the duties of a distributor change as well. Depending on the size of the company, the distributor starts to function as a marketing specialist initiating several marketing activities at once. These include market research, promotion, publicity, and advertising. Each one depends upon the other..."As in weaving a fabric, each strand must have a relationship to the whole and add to the total effect or pattern, so as a marketing ingredient, promotion, publicity, advertising, and research must be entwined and not go marching off by itself" (Gregory 172).

With the tools of promotion, distributors hope to shape the look and feel of the film, giving it a uniform and commercially viable image. In doing so, they create key art, posters, logos, trailers, and other support materials. Publicity also begins at this point: writing, arranging and planning press releases, interviews, video press kits, and premieres. Key entertainment contacts are targeted, such as film critics, entertainment magazine editors and television producers to arrange for exclusive interviews and other opportunities.

Advertising includes all forms of paid media exposure on radio, television, newspaper, web, trade journals, direct mail, and billboards. Most Hollywood produced films run ad campaigns ranging in price from \$20 to \$50 million dollars while the average independent distributor will spend around \$500,000 for a large production and as little as \$10,000 for small ventures (Neale 37). Decisions on type, size and length, look, and schedules are influenced by the forecasted profit of the project. This forecast is created from distributor-conducted research on potential audience size, test screenings, screen availability, competitive products, economic situations, and sometimes, gut feelings.

At the same time, business-to-business materials are crafted. These are the tools used to sell the film to theatres, video stores, retail outlets, web sites, and broadcast and cable stations. The tools include sell sheets, catalog pages, program incentives, movie posters, shelf talkers, and customer give-aways. Anything that can be used to create excitement about a film and demonstrate its potential appeal to an audience is used.

The distributor must find an audience for the film (rental, retail, broadcast, theatrical, and/or national/international). Doing so additionally the distributor to: acquire the film and its rights; sell film units; meet with prospective clients; attend and promote the film at conventions and film festivals; market the film; manage the physical distribution of the movie (i.e., shipping, packaging, etc); and establish methodology of payment collection

CHAPTER FOUR

CASE STUDIES

While traditional distribution techniques are as old as the motion picture industry, the art of self-distribution is relatively new and untested. Yet, for an independent filmmaker to get his/her film noticed in today's market, self-distribution has become a necessity. Traditional distributors (from studios and large operations) simply are not buying independently produced films. This assertion is particularly true for a first time, unknown, and previously un-established filmmaker. In addition, the number of people making films is ever increasing – in other words, the competition, from both studios and independents, is greater. And while self-distribution typically is the least preferred method of distribution by filmmakers, realistically, an independent has no other way of getting his film to market. Therefore, the author herein builds upon traditional distribution models, as explained by academic and trade publications, by turning to individuals with self-taught expertise and a proven track record of success in the realm of self-distribution. These individuals offer the most thorough picture of self-distribution in the independent filmmaking arena, as the literature on the subject is pointedly all but non-existent.

CASE STUDIES: Background

Before a viable self-distribution plan could be developed, it was imperative to ascertain more detailed information regarding what equates self-distribution success in the independent filmmaking realm. To obtain such a sketch, seven interviews were conducted over a month with persons having expertise in marketing, distribution, promotion, acquisition, and utilization of the internet. Due to the complexity and nuances of self-distribution, it was decided to employ the expertise of individuals with diverse backgrounds relating to independent filmmaking. The individual's chosen were:

- Lloyd Kaufman – President, Troma Films
- Ted Bonnitt - President, 7th Planet Radio Productions
- Mark Taipo Kines – Independent Filmmaker
- Chris Gore – Founder/Editor, Filmthreat.com
- Bradley Beasley – Independent Filmmaker
- Don May – Founder/President, Synopsis Films
- Ted Sarrandos – Acquisitions Director, Netflix.com

Initially, individual specified case studies will be examined followed by findings confirmed through all or most of the interviews.

CASE STUDIES: Individual interviews

Mau Mau Sex Sex

Get to know independent cinema's original Butch Cassidy and the Sundance Kid – Dan Sonney and David Freeman – two purveyors of sexploitation films who gained fame as “The Sunshine Boys of Smut.” This critically acclaimed documentary takes a hilarious and affectionate look at the friendship, families, and fortunes of two filmmakers who supplied the fervid “reality” to the forbidden dreams of a repressed society.

Filmmaker

Ted Bonnitt directed, produced, edited, and co-wrote *Mau Mau Sex Sex*. The feature length documentary was the first film to be distributed independently to theatres across the United State on DVD. Bonnitt also owns a California production company that creates and produces radio campaigns for major motion pictures, including *Spiderman*, *Lord of the Rings*, and *Charlie's Angels*. Mr. Bonnitt has served as a journalist and has written and produced for CNN, NBC, and National Public Radio.

Key Point: Revolutionary Distribution Techniques

Self-distribution was not the first choice for Bonnitt. He had been in negotiations with very notable distributors but decided to pass when their offers amounted to “exclusive rights for them and no money

down for me.” He felt his only choice, therefore, was to embrace self-distribution and brave the risky waters of all that it entailed.

Because his film was a documentary with no marquee talent attached, Bonnitt needed to establish a perceived value. “If you want to make money in the potentially lucrative distribution channels of broadcast television, cable, and home video/DVD sales, the cache of a theatrical run will make all the difference in the world.” With that, Bonnitt decided to shun conventional wisdom and theatrically distribute his digitally shot feature.

“I decided that if I opened in New York City and got some positive reviews, it would launch me out of the gate with some serious momentum.” To accomplish this monumental task, Bonnitt phoned three Manhattan theatres and offered them VHS screeners of his film. While the theatres loved his film, they were extremely hesitant to commit because he did not have a 35mm print.

Bonnitt could not afford to spend the approximately \$40,000 to make transfers and prints. What he did, therefore, was to counter with a radical idea whereas the theatres would digitally project his documentary feature from DVD. First, he convinced Sharp Electronics

to provide their latest digital projector as a means of promoting their equipment to theatres. He then persuaded the theatres to pay for the projector to be shipped and installed. "Necessity is the mother of all invention. I could not afford to make a print and they did not want to pass up the chance to make money off of my film." In the end, everyone won. Sharp Electronics gained market share and continues to sell their projectors, the theatres made money, and *Mau Mau Sex Sex* received rave reviews from influential New York media.

Mau Mau Sex Sex since has played theatrically before Los Angeles, San Francisco, Chicago, Boston, Philadelphia, Seattle, Portland, and Salt Lake City. In each case, Bonnitt was on hand to sell DVDs and further promote his film. *Mau Mau Sex Sex* continued to gather rave reviews, which eventually parlayed into a variety of lucrative national and international distribution deals.

Foreign Correspondents

Mark Tapio Kines's directorial debut is a two-part meditation on love and correspondence. The first, "Dear Jenny," looks at what a woman (Melanie Lynskey) does with love letters she gets in the mail that are really meant for the woman who used to live in her apartment. "Love, Trevor" examines the choice a man (Corin Nemec) makes when he visits a pen pal staying in the United States and finds she needs him to marry her to prevent deportation.

Filmmaker

Mark Taipo Kines wrote and directed *Foreign Correspondents*. He is also the founder of Cassava Films, an independent production company based in Southern California. Previously, Kines worked in the Internet industry and was responsible for designing entertainment web sites. His credits include *MADtv*, *12 Monkeys*, *Waterworld*, and *Star Trek*. He is a graduate of Cal Arts where he received his BFA in Film with an emphasis on Experimental Animation.

Key Point: Utilizing the Web and Targeting Niche Audiences

In the summer of 1997, filmmaker Mark Kines personally financed the shooting of his feature length film *Foreign Correspondents*. He spent more than \$40,000 on 35mm film stock, camera, light, and sound rentals, actors, food, set design, and crew. A serious problem arose, however, when he came to the sober realization that he had no monies left for post-production. In essence

he saw no way of finishing his film - no chance of ever recouping his investment. Ultimately, the web designer turned filmmaker decided to turn to the Internet for help.

"I thought the only possible chance to get money fast was to see if I could get the word out about the film." Therefore, Kines designed and developed a website for his film, www.forcor.com. The site was user-friendly and comprehensive. It allowed visitors and potential investors a chance to follow the film's progress by utilizing bulletin boards, updates, production stills, polls, and film dailies. Realistically, however, Kines knew that very few people would ever find his site unless he found a way of making people aware of its existence.

Because Kines had cast fairly well known actors including Melanie Lynskey (*Heavenly Creatures*) and Will Wheaton (*Star Trek: The Next Generation* and *Stand by Me*), he turned to their fan sites and mailing lists. "I hunted down the people that ran those sites and said, hey your favorite actor is in my movie." The word quickly spread, and before he knew it, Kines and his film had a following.

A couple of months after Kines launched his site, a Canadian fan of Will Wheaton's expressed serious interest and eventually invested

\$25,000. Another big investment came from a Melanie Lynskey fan that stumbled upon the site and agreed to contribute \$5,000. "I was surprised to see so many people help a complete stranger, and I worked incredibly hard to make sure people had faith in me. I would send them updates and rough cuts, anything I could to let them know that they were not putting their faith and money in the wrong person." All told, 25 web fans sent funds totaling more than \$150,000 to Kines to help finance his project.

Upon completing his film, Kines began selling copies of the DVD directly from his site, utilizing the web as a distribution tool. "Web sales were a huge success. I had a lot of very interested people that could not afford to invest money in my movie but they were willing to spend \$30 bucks to buy a copy." Kines since has taken his movie on the film festival circuit, which ultimately helped land him national and international distribution deals. Today, the *Foreign Correspondents* DVD can be purchased at Netflix.com, Amazon.com, and forcor.com.

Okie Noodling

Noodling, a type of fishing activity that uses hands as bait is the subject of this engrossing documentary by Brad Beasley. With a healthy dose of humor and panache, Beasley captures *noodling* in all its eccentric glory, presenting it not merely as folly but as a true sport in Oklahoma, where he trails a band of men (and their sons) who have taken to “extreme” fishing.

Filmmaker

Bradley Beasley wrote and directed *Okie Noodling*. He is also the founder and President of Sage Brush Shorty Productions, a small independent production company based in Oklahoma. In 2002, Beasley was named one of *Filmmaker Magazine’s* “Top 25 Independent Filmmakers.” He has a long-term collaboration with the Grammy award-winning group Flaming Lips, and he has directed nine of their music videos.

Key Point: Communicating your Film, Theme, and Story

A native Oklahoman, Bradley Beasley is an independent filmmaker with a passion for his state. He has written and produced several documentaries pertaining to Oklahoma, covering about everything from hometown little league games to hand fishing for 200 pound catfish. His films are simple and straightforward and often shot handheld in a cinema vertie’ style.

In today's world, Beasley's style and storytelling techniques may not seem like very marketable commodities. Beasley, however, has developed a tried and true method of communicating his films to key stakeholders such as film festival directors, Public Television Executives, and funding agencies. "When writing a film treatment, grant proposal, or synopsis, I try to communicate my passion for the project and why I feel it needs to be seen...and while I write with a lot of excitement and energy, I strive for complete honesty. Most importantly though I feel it is imperative to communicate how my story will be told using style, structure, theme, voice, etc."

Bradley Beasley has been extremely successful in his efforts. He has found funding and audiences for all of his films. In 2001, he received \$60,000 from ITVS (Independent Television and Video Service, a quasi-governmental funding agency for programs specifically designed for public television) for his 16mm feature length documentary *Okie Noodling*. The deal provided Beasley with the monies necessary to finish production. Upon completion, the film was picked up by PBS and continues to run in numerous television markets. "The ITVS deal really helped me, not only in providing finishing funds, but also in DVD sales. I sell a ton of DVDs each week from my website to people that saw my film on PBS."

Okie Noodling furthermore has won awards at several prominent film festivals including South by Southwest and the Toronto International Film Festival. Because of the film's success and critical acclaim, *Okie Noodling* eventually was picked up by Red Line Entertainment and is currently being sold at stores such as Best Buy and Wal-Mart. "I am often asked how a film about hand fishing could be so successful...what I tell people is that on its own, the film is nothing. I could not have gotten the exposure I have without writing a very compelling treatment."

In 2004, Beasley scored again when he successfully pitched his latest documentary (*The Creek Runs Red*) to the LInCS ITVS Funding Initiative. The initiative receives approximately 1200 submissions, with 10-12 films receiving funding. When asked about his success, Beasley once more pointed to the importance of a passionate, compelling, and clearly communicated treatment.

CASE STUDIES: General findings

Film as a Product

A recurring theme stressed throughout the interviews was that, from the onset of creation, independent filmmakers need to treat their film/DVD as a product, not only or simply as a creative, artistic venture. Filmmakers need to remain cognizant of the end goal – selling their film. Everything in the making of the film should be done in order to better the film as “product.” Nothing of impact should be an afterthought (i.e., “oh, we should have taken some stills,” or “wouldn’t it have been cool to document some behind the scenes footage?” etc.). Unless the filmmaker is independently wealthy, his/her primary motivation behind making the film should not be thoughts of their film as a piece of art. Rather, the end goal of selling the product must remain the focus. Before the first stage of production, therefore, filmmakers should consider or identify a variety of factors including, but not limited to, target audience, marketing, advertising, promotional plans, and theme.

After planning out the film, filmmakers should do a budget analysis to examine the costs. As Chris Gore puts it, “I have seen filmmakers invest all of their money on film, processing, prints, and actors without having set aside a penny for advertising and marketing.

I ask them, would General Motors do that? Would they spend millions of dollars on developing a car and then not advertise it? It would be corporate insanity." Ted Bonnitt agrees, "I planned out *Mau Mau Sex Sex* very thoroughly and knew upon completing my film that I would spend \$15,000 on the marketing campaign. It is just a part of doing business."

To summarize, the experts concurred that a filmmaker continually must key in on their film as product, considering concept, design, production and distribution, remaining emotionally detached, defining the customer base, then keeping that costumer always in view. Thematically or artistically, new ground can be blazed, but again, with the guiding precept that people must want to watch the film – in other words, the film remains a product that consumers will want to consume.

Marketing and Promotion

"Start marketing your movie the day you decide to make a movie. Really- tell everyone you know about what you are going to do. Print up business cards with the movie title and your name and pass them around. Start planning the poster, tagline, audience description, concept capsule, media kit, website, media coverage and sales letter as early as possible" (Gore).

The only way an independent film is going to get noticed is through marketing and promotion. Regardless if a filmmaker is searching for an audience or hoping for media reviews, he/she must market the product in some manner. Notice, the field experts again used the word "product" throughout the interview/case studies when they were describing promotion and marketing of independent films. Independent films *are* products and must be thought of as such to market them to respective audiences with any semblance of success. Without knowing things like who is the target audience and what are the demographics of the target audience, it is impossible to clearly define who wants to view or purchase the movie. Without this market research, it is even tougher to identify appropriate promotion plans for the film. If a film is not promoted correctly (and to the appropriate market/s), it will never get noticed.

The interviewees mentioned the following specific techniques relating to promotion and marketing:

Grass Roots- While the benefits of a promotional website are many and obvious, both the DVD and the site must be pushed relentlessly. Troma owes much of its success to its grass-roots campaigns in which

fans spread the word on the web through emails, posts, message boards, and blogs (Kaufman).

Unconventional Marketing- "Dress up in character at a niche convention" (Kaufman). Troma goes to the Cannes Film Festival and takes a bunch of 'crazy' young adults that dress up to in costumes to draw attention to Troma and its films. Kaufman further claims that scantily clad women never seem to hurt the process (in other words, sex sells). The same principle would work at comic book conventions for movies that were targeted to persons with related interests. At Sundance, the producers of *Memento* passed around flyers that looked like "Wanted" posters saying "someone killed my wife, help me find him."

Word of Mouth/Get a Champion- Find someone who will champion the film. This should be someone with credibility and/or celebrity status. In the case of the former, find a film critic, for example, to write a great blurb that can be used on the website, DVD cover, print and electronic media, etc.

Website

"It does not matter how many people want to rent Troma movies, they won't be able to if store owners refuse to buy them {...} Newly important in the sell-through market, and to the continued survival of independent film is the world wide web." (Kaufman 194).

Kaufman's alludes to the fact that the Internet offers the best opportunity for niche marketing, especially for small and limited audience movies and videos. Before use of the internet reached critical mass in both homes and offices, a film marketer had to promote to broad audiences in hopes of finding his niche in the whole. In many cases, a filmmaker could only hope that the niche audience actually "found" the film – in other words, a vocal, connected source got wind of the befitting resource, and inadvertently helped spread the word. Now, with the popularity and use of the Internet, a film marketer can directly approach niche audiences via connections on the web. Utilizing listservs, posting on message boards, "talking" in chat rooms and directing media and promotions to these specific venues (and their subsequent supporters) will make marketing efforts all the more effective than simply trying to send the same film out to a general audience. "You may not become a big star, but the project may become a big event within these niches" (May).

“Creating and maintaining a website is an absolute necessity in the world of independent filmmaking. It is the vital link between the audience and filmmaker (Bonnitt).” The website adds another avenue of marketing that is both accessible and tangible to the audience, or consumer. In addition, it provides another sales outlet and the ability to control content in a manner that is not possible with emails, message board updates, and blogs. The marketing message can remain “pure,” according to the webmaster/filmmaker’s specifications.

In or by itself, however, a website is not the saving grace of a movie’s marketing venture. In today’s day and age, a lucrative website *must* be employed, but it is still one of many promotional venues that should, in most cases, be used in conjunction with other avenues. It is simply yet another tract that an independent filmmaker must pursue along with market research, identifying a target audience, etc., even if it is a very important tract in the world of independent filmmaking.

The web is increasingly important in letting people know practical information, such as when and where films are playing. Such information may be the single most important thing that an indie film site can provide to viewers. In addition, case study interviewees conceded that it is valuable for the independent filmmaker to get

creative with the site, creating an experience for the surfers. Try and do something different to get noticed. The *Memento* website offers a valuable example. The film centered on a puzzle, and the website incorporated that theme by offering online games. Such resources got people talking about the film.

The best example of a notable independent film utilizing the web to its full marketing potential is *The Blair Witch Project*. The filmmakers used creative techniques to draw viewers to the film for more than a year before its release date. Authentic looking newsreels, interviews, police reports, and diary entries all were utilized. At its grandest, the site was viewed 2 million times a day. The site became an extension of the movie, and the movie went on to gross 150 million dollars.

The film and its presence on the web created a crescendo effect. Websites were fashioned introducing back-stories, subplots, character development, fan created scenarios and alternate endings. In addition, a plethora of other internet resources centered on the film, including blogs, surveys, screen savers, film trailers, games, music downloads, product sales sites ... the list is endless.

It also is interesting to note the successful, early-on marketing and promotion that the filmmakers of *Blair Witch* entailed. While promotional efforts related to this film were tied largely to the web, much of the film's box office success is tied directly to the attention its filmmakers paid to early promotion and establishment of a market presence, regardless of the message's venue. Its success pointedly confirms the necessity and usefulness of checking out market interest – in the case of *Blair Witch*, the initial and chief market consisted of teens, college students and urbanites. As stated earlier, promotion started early and hard.

Several of the interviewees made individual points pertaining to web presence that were true in their particular situation. Bradley Beasley (okienoodling.com) conveyed that he made a large contract deal pertaining to the general marketing of his film, but he kept ownership of the film's website so that he could control its content. His website also provides a successful sales outlet for many units even though his movie additionally is sold in Best Buy, Music Land, Wal-Mart, Amazon, and Netflix. Lloyd Kaufman (troma.com) states that he heavily relies on a movie's website. He makes the most of the site to build excitement, recruit actors, give information about upcoming films and tours, etc.

Ted Bonnitt (maumausexsex.com) released his movie in stores but he still sells many units on the film's website. He claims that the site builds excitement and adds to his film's credibility in the eyes of many consumers. Bonnitt furthermore tracks user information via the web, such as geographic location. The site posts show times, premiers, and touring information. Bonnitt asserts that numerous deals were made "right off of website."

Mark Taipo Kines (forcor.com) asserts the benefits of getting people actively involved via the website. For example, he involves people through polls, design contest, updates, and sales promotions.

Target Audience/Identifiable Niche

"You have to market to your niche. You must have a core audience to launch your film/DVD. It may broaden out from there, but you have to go after the niche first. Whatever your niche is, hit it hard" (Gore).

Identifying a target audience should be one of the first steps in the independent filmmaking production process. A "niche" audience may be identified as such depending on numerous factors. In addition, a core audience may consist of a niche that is distinguishable by any single factor or by multiple factors (i.e., senior travelers vs. young

travelers; sexual orientation and the church vs. the death penalty and the church (or religious perspective concerning the death penalty). A film's target audience may consist of a distinct niche or the film may be appealing to a handful of niche audiences.

The following list offers a sampling of personal descriptors that may be used to represent a niche audience; it is by no means exhaustive. The listing is meant to offer examples of different niches to which a film may be targeted, and it is derived in part from case study examples:

- Sexual Orientation
- Political or social issues
- Religion
- Local or regional interest
- Hobbies
- Seniors
- Travelers, "real" or the armchair variety
- Age – Generation X, Generation Y, Baby Boomers, etc
- Demographics (socioeconomic, etc)
- Race

When identifying a target audience, a filmmaker must consider the marketing techniques and venues that are most appropriate to that particular group or groups. For example, arguably, persons of Generation Y, followed by Generation X, are considered the earliest adopters of technology. Such information may indicate that the web as a promotional tool may be most appropriate to audiences that consist

of these age groups. Ask, is this group most likely to hear about the film through radio, television, periodicals, newspapers, etc? Which newspapers, periodicals, stations, etc?

Packaging

The importance of packaging is irrefutable. Of course, how the product is packaged should be tied heavily and consistently with its marketing concept. For example, to whom is the product being marketed? In general, what is appealing to this particular target audience? Product packaging should have a look and style consistent with other promotional materials such the webpage, posters, giveaways, etc. A similar vein of color, style and text should be used for anything that describes or promotes the product. Again, the film is a product, and the marketing and packaging should treat the film as such – a product desired by consumers. If available and appropriate, review comments are a positive touch for the package's cover.

Consider whether the packaging is conducive to merchantability. In other words, are UPC codes present? Is the wrap bulky and difficult to shelve, or is the package shrink-wrapped and potentially easy for a store to shelve? Would the packaging help or hinder small or major mailing projects? Packaging should be protective of materials, especially when a product is being used in high use settings (such as

video rental stores or libraries). Follow standards if they exist, again, making the handling of product as simple as possible for the potential purchaser. Any text presented on the physical DVD should be printed, not adhered by a label, since labels are more prone to damage user machinery. Take these factors into consideration, and attempt to make the packaging as merchantable as possible.

Patience

All interviewees noted the importance of patience with the distribution and selling process. They explained that an independent filmmaker should not expect to make a million dollars or sell thousands of copies (even hundreds) on the first day of film's release. Distribution and profitability takes a long time, and involved parties should be prepared to stick it out for the long haul. The case studies advised against such practices as maxing out credit cards because money will not be made fast enough to cover such expenses. The more patience a filmmaker has, the stronger his/her position will be to negotiate.

Non-Ordered Selling

Unlike the major studios, independents can not afford to release their DVDs in stages. They should be prepared to sell the DVD

whenever and wherever the chance arises. If a filmmaker is holding a premiere or showing, he/she should take a substantial number of DVDs along. Do not run out! Everyone in attendance should know that copies are available for purchase. The same concept holds true for any TV/cable showings. Arrange to plug the DVD via a tag at the end of the program. With that, let viewers know where they can purchase the DVD directly (i.e., www.whatever.com).

CHAPTER FIVE

DESIGN

While content may be the main attraction of a DVD, menus play a vital supporting role by providing cohesion and structure to the entire production. A menu adds interactivity to the disc -- a virtual tool that allows the viewer to explore and control the digital environment (Williams 114.)

In preparing to design the menu and interface for *Finding Fidel*, much time and energy was spent analyzing both Hollywood (studio) and independently produced DVDs. Such analysis allowed for a greater structured understanding and appreciation of the different options including menu style, navigational tools, features, themes, and overall functionality. This highly beneficial process allowed for the careful examination of over 35 unique menu layouts. To gain the greatest exposure, a variety of genres were cross-examined including Sci-Fi, Horror, Comedy, Documentary, Action, Foreign, Mystery, and Drama.

Upon viewing, it became apparent that no two DVDs were alike. Of course, the visuals included on each menu were unique to the film's content – each film contained its own photographs, video clips, and theme. The menu content consistently differed, although all the DVDs

shared common design principles. The principles could be categorized into three basic menu styles; utilitarian, derivative or conceptual (LaBarge 14).

Utilitarian Menu

A *utilitarian menu* solely exists to provide navigation of DVD content. In its most basic form, utilitarian style displays little or no intent to acknowledge the disc's unique content either visually or conceptually. This menu style is most frequently used in non-commercial ventures such as home movies or corporate produced DVDs intended for internal use. Often times, the menu includes only text buttons on a single color and motionless background with no sound. *REASONS TO USE*: economical; requires little effort and talent; practical.

Derivative Menu

The most common type of professional menu design is the *derivative menu*. With this style, the majority of the graphic and video elements used in a menu composition have been lifted or derived from the main video content of the disk. A deliberate, literal connection exists between what is seen in the menu system and what is seen in

the video (content) itself. The video content placed in the menu may be in the form of still images, key motion clips, or audio extracted from a movie. These components then are used as the basis for a menu background.

Most Hollywood created DVDs use derivative menus in some form. The menus function as a kind of preview for the video content and usually depict some of the most exciting or representative scenes. Such ties offer the most obvious way to ensure a meaningful connection between the menu system and the movie. *REASONS TO USE*: consistency, convenience, cost, visual interest

Conceptual Menu

The most ambiguous design style for a DVD is the *conceptual menu*, which requires much more effort to create, but often provides the most interesting visual experience. This style consists of original visual elements conceptually related to the disc's content. The new imagery is suggestive of the overall character and spirit of the video, but unlike derivative menus, the imagery is extracted is not extracted from the film directly. Conceptual style visuals are unique to the menu system itself and are not repeated anywhere in the video content.

Conceptual menus are both fun and challenging to create because the designer is not limited to pre-existing visuals. The imagination can run wild, allowing for the creation of fresh imagery that expands and builds on the themes presented in the movie itself. Conceptual menu systems can take on many forms such as a virtual world that contains the DVD navigation. These worlds, or menu environments, use visual metaphor of three-dimensional space in which the DVD viewer can move around and interact. Navigational buttons are made to appear as an integrated part of the virtual scene, rather than superimposed over a background image. For example, in a menu environment designed to replicate the interior of a futuristic spaceship, the buttons might be shown as a three dimensional toggle arranged on a high tech panel.

Conceptual menus can be based on 3D animations, still photographs, motion graphics, or even hand drawn illustrations. To be effective, the menu scene should have some connection, however loose, to something present in the main video content. The best DVD designs use a visual style that is well matched with the content to inspire and delight the audience (Williams 133). *REASONS TO USE:*

Creativity, enhances perceived value, provides a theme, suited to content

FINDING FIDEL DESIGN

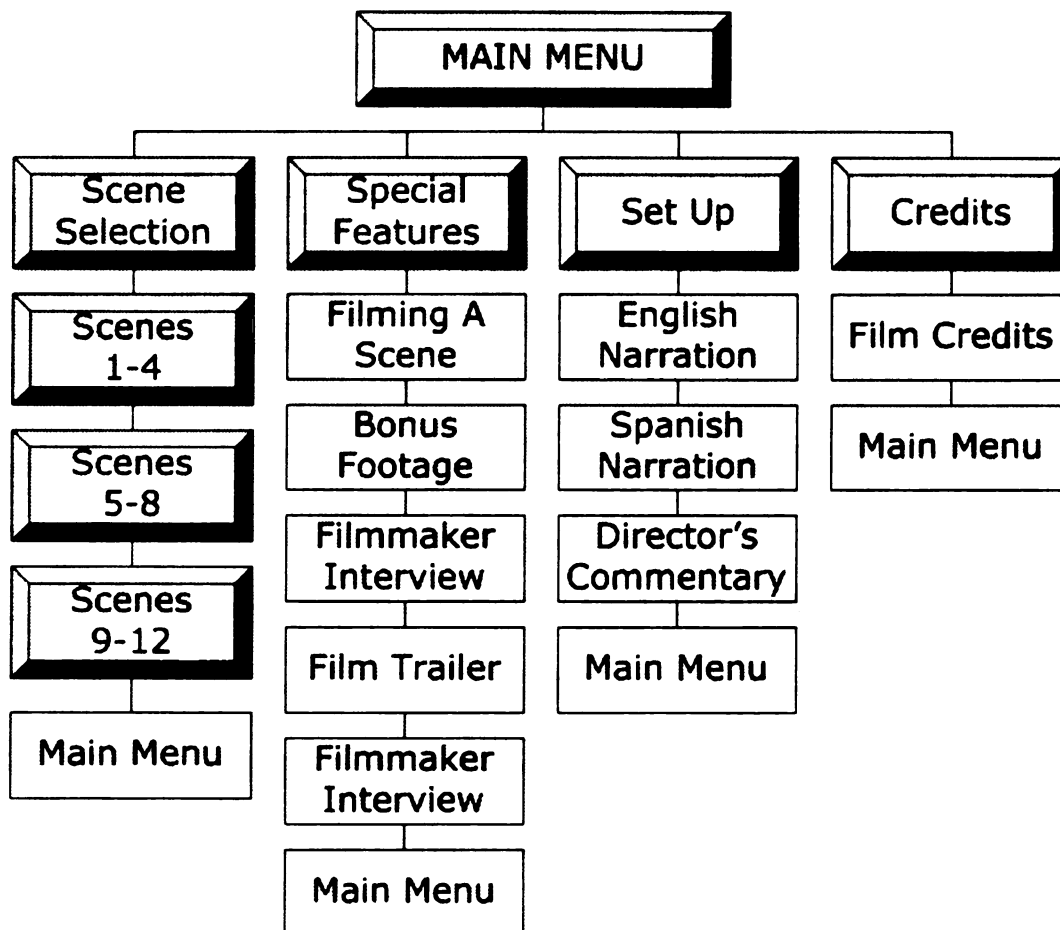
Various menu styles were analyzed, personally and academically, allowing for informed decision making when designing the *Finding Fidel* DVD interface/menu. From the onset, the overall goal was to create a visual interesting, conceptual set of menus. An important assumption was that the menus were to contain motion graphics, text, photographs, and video. Furthermore, it was highly desirable to keep the overall look and feel as clean and simple as possible.

Another essential design factor concerned usability. It was important for menus to be easily understood with clearly defined, consistent, and organized interfaces. Users must be able to navigate the menu system in a logical and straightforward manner.

To ensure organization and consistency, it was necessary to map out the DVD hierarchy (Figure 2). This initial step was crucial to the design process because it helped ensure that all necessary elements

and information would be included on each menu. For example, on the set up menu, the hierarchy made it clear that 4 items needed to be included in the navigational menu -- *English Narration, Spanish Narration, Director's Commentary, and Main Menu.*

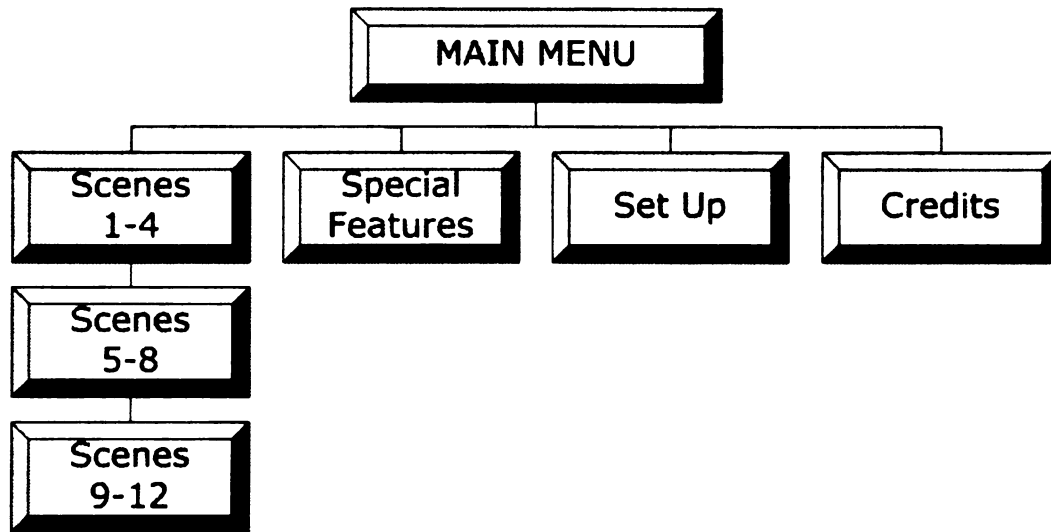
Figure 2: Complete DVD Hierarchy



Once the complete DVD hierarchy had been established, the next step was to narrow down the hierarchical structure to include only the

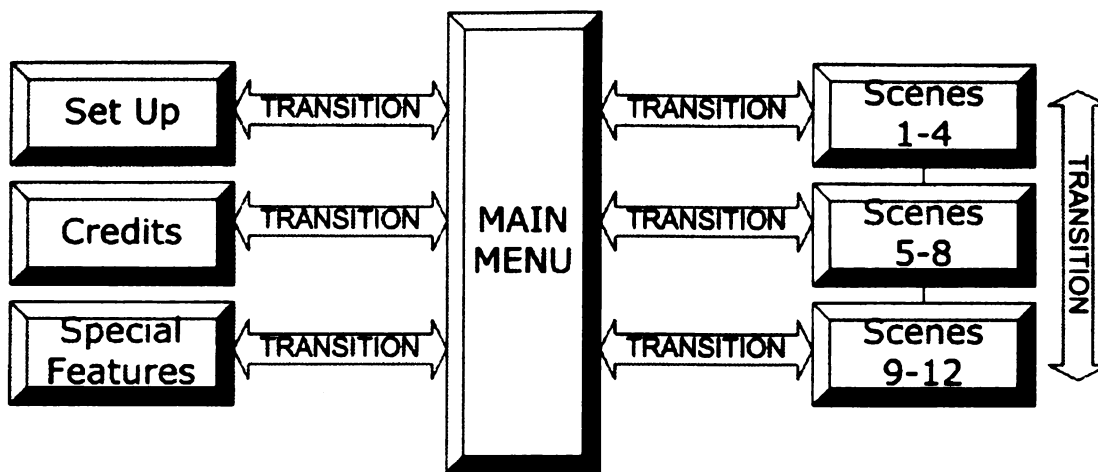
DVD menus (Figure 3), or those only that needed to be designed and developed and put onto the DVD.

Figure 3: DVD Menu Hierarchy



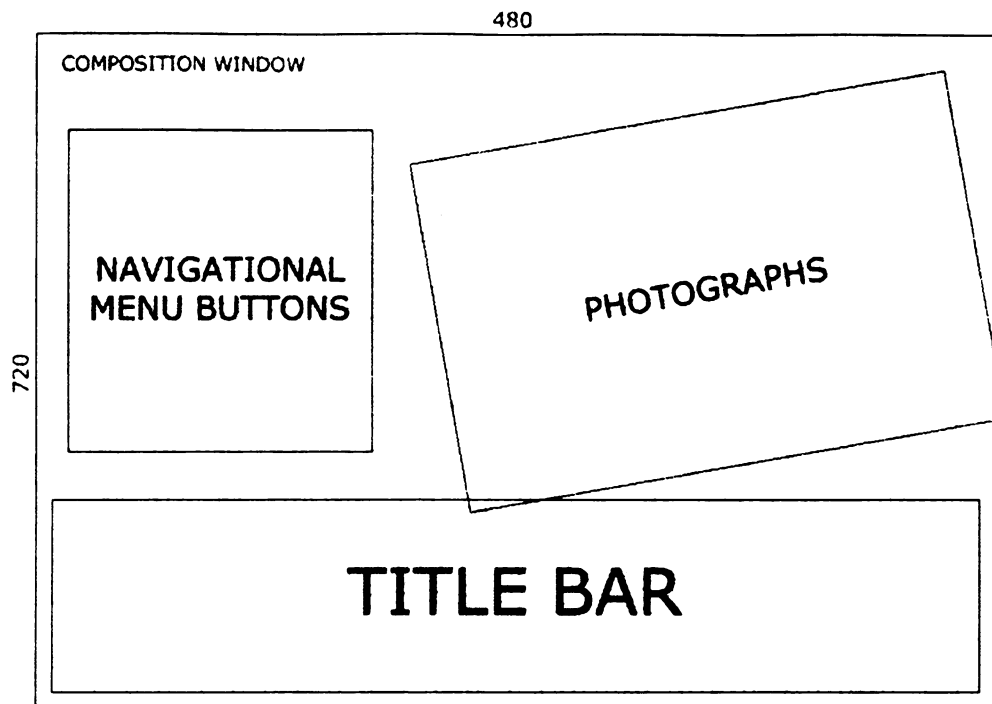
Next, necessary menu transitions were identified and mapped (Figure 4). Again, this was a very critical step involving the design and development of all transitions. A clearly organized hierarchy allowed for and supported an organized workflow and consistency.

Figure 4: DVD Menu Transitions



With the hierarchy mapped in detail, an initial design model could be sketched out and created (Figure 5). The model had an aspect ratio of 720x480 and consisted of text, photographs, and motion graphics. The design model (*design model 1*) would be used as a template for the main menu, special features menu, set up menu, and credits menu. As a working and functional template, content could be added or subtracted depending on the menu. Three distinct design areas were created -- photographs, title bar, and navigational menu buttons. The distinct design areas were conceptually beneficial because they allowed for content to be added while maintaining characteristics across all the menus ie, font type, color, size, scrolling speed, rotating speed, drop shadows, etc.

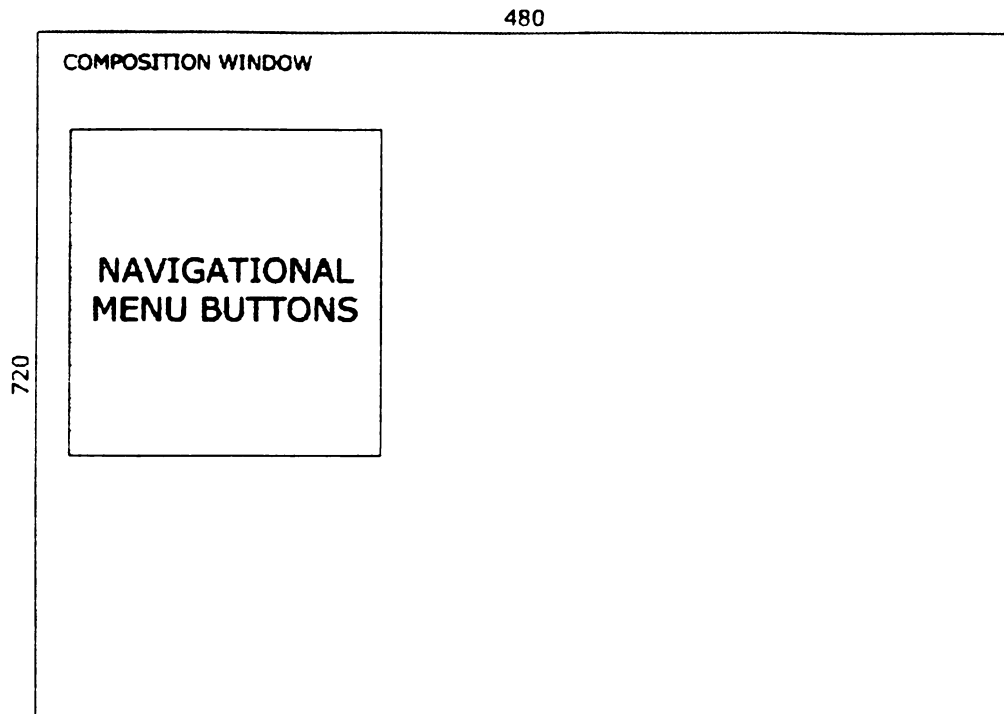
Figure 5: Design Model I



Navigational Menu Buttons

In creating the menu buttons (figure 6), the primary goal was to make them clearly legible for use as navigational aids. A bold san-serif type font became an important font choice because it is capable of being viewed on a variety of monitors. It was also decided, to use a white as the primary font color with a slightly blurred black drop shadow. The placement of the text was consistent across all the menus and was located in the left quadrant of the screen.

Figure 6: Navigational Menu Buttons

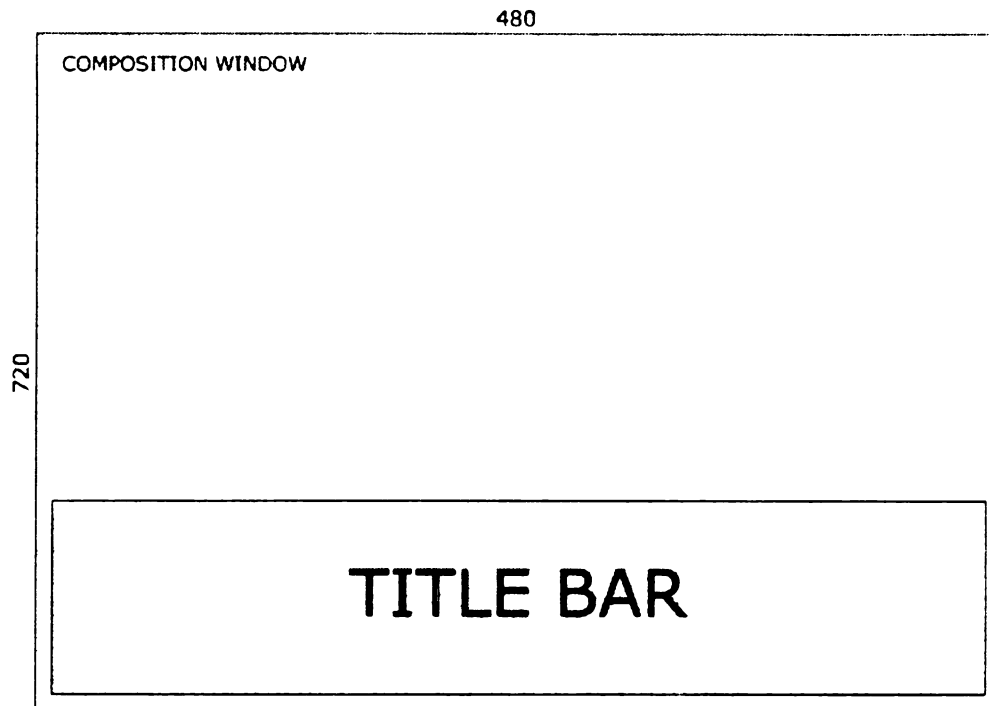


Title Bar

The purpose of the title bar (Figure 7) was two fold; decorative and informative. To a certain extent, the title itself, *FINDING FIDEL, A Young Man's Journey*, was decorative. In keeping with the overall look and feel of the DVD menu system, the font was bold san-serif. The informative nature of the title bar found the specific menu title (MAIN MENU, SPECIAL FEATURES, etc) scrolling horizontally across the screen, providing users with a clear navigational label or marker. Like the other text, it too was san-serif. The placement of the title bar was

consistently located in the bottom quadrant of the screen across all menus.

Figure 7: Title Bar

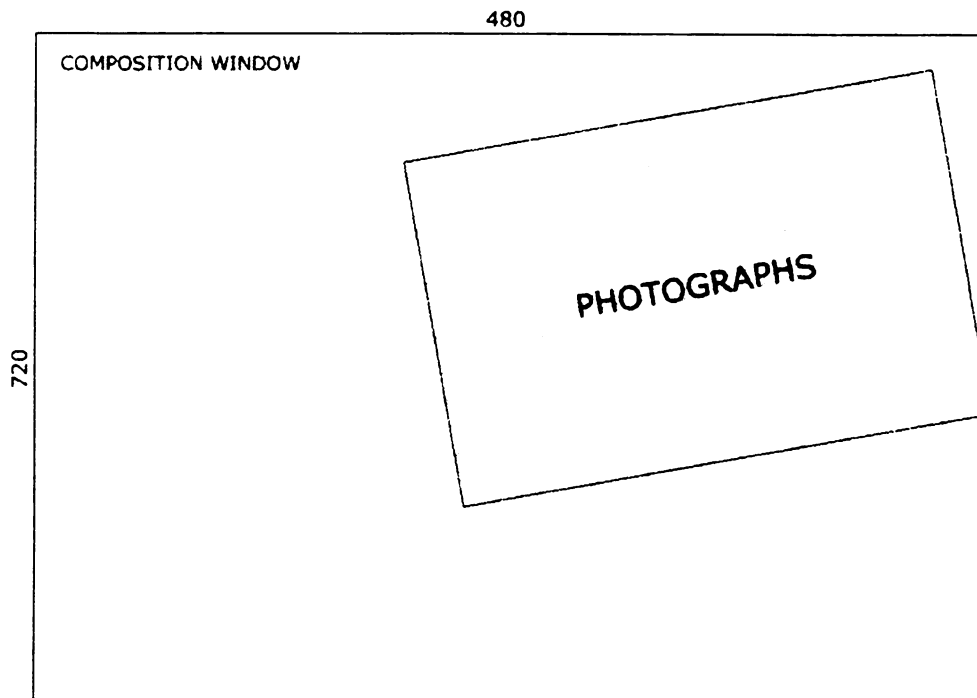


Photographs

The purpose of the photographs (Figure 8) was purely visual. They existed to provide a colorful, rich experience for the viewer. The photographs are suggestive of the overall character and spirit of the film and are intended to illicit a visceral reaction from the viewers consistent with the film's overall tone. To further convey the

conceptual look, the photographs would be set on a white background, symbolizing the look of a scrapbook or travelogue.

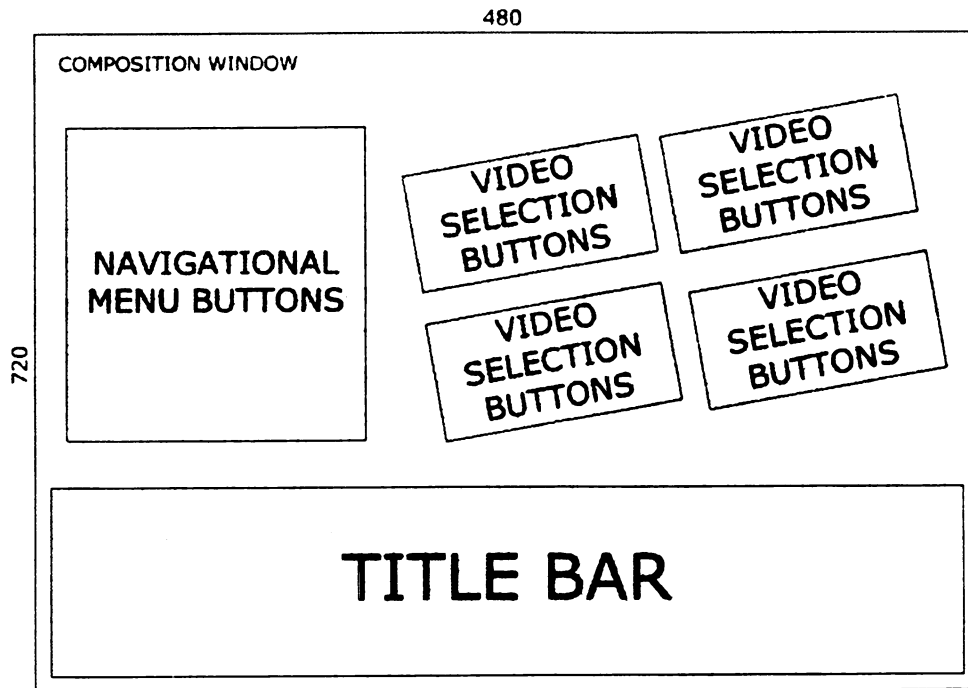
Figure 8: Photographs



In creating a model for the scene selection menus (Figure 9), a necessary design consideration was that video clips would be utilized. In constructing this model, the area previously reserved for photographs was replaced by four video clips. The other design areas remained the same (navigational menu buttons and title bar) with the exception of the content being included in each. The video included in each of the buttons would represent the DVD chapters from which

each of the videos would originate. Furthermore, the videos would be set to loop after a period of 30-45 seconds.

Figure 9: Design Model II



CHAPTER SIX

DEVELOPMENT

The development process began with the identification of necessary authoring tools. The project's nature made it essential to choose professional software packages capable of digital video/audio editing, motion graphic/video compositing, graphic design, MPEG compression, and DVD authoring. The programs needed to be Mac OS-X compatible and able to be run on an Apple Powerbook with 1Ghz processor/1 Gig of RAM. As such, the following tools were eventually identified and purchased:

- Final Cut Pro IV
- Adobe After Effects 6 Professional
- Adobe Photoshop 6
- DVD Studio Pro II
- QuickTime Pro

Final Cut Pro (FCP)

FCP was crucial to the development process, as it allowed for full frame (NTSC 29.97) capture, playback, and editing of digital video/audio. FCP was utilized to digitize footage from both the *Finding Fidel* master and source DV-Cam tapes. Captured/Edited footage consisted of:

- Finding Fidel (Main Film on DVD)

- Directors Commentary (DVD Set Up)
- Filming a Scene (DVD Special Feature)
- Interview with Director (DVD Special Feature)
- Video Buttons (Scene Selection)

Upon completion of both the capturing and editing, footage was exported from FCP as self-contained movies and saved to an external hard drive.

After Effects

After Effects was chosen due to its powerful compositing capabilities. The software allowed for various graphics, video/audio, photographs, and text to be assembled, modified, pre-composed and eventually output as a single QuickTime movie. In all, 23 separate movies were created, including 7 motion menus and 16 transition movies. All movies were rendered and exported as full frame QuickTime movies. Each movie had an aspect ratio of 720x480.

QuickTime Pro

Before the rendered movies could be utilized in a DVD authoring program, they had to be converted from QuickTime files (Table 1) to MPEG 2 files (Table 2). QuickTime Pro was used to accomplish this task. Within the program, the 23 QuickTime movies were opened and saved as MPEG 2 files. The compression setting for each was a value

of 7, as per the compression scheme. The files were rendered out as separate audio/video files.

Table 1: QuickTime Files

NAME	LENGTH	SIZE	FORMAT
mainmenu.mov	:45 sec	308.1 MB	QuickTime Movie
Special.mov	:47 sec	307.0 MB	QuickTime Movie
scene 3 (9-12).mov	:37 sec	255.8 MB	QuickTime Movie
scene 2 (5-8).mov	:37 sec	252.5 MB	QuickTime Movie
scene 1 (1-4).mov	:35 sec	236.2 MB	QuickTime Movie
setup.mov	:34 sec	188.3 MB	QuickTime Movie
Credits.mov	:21 sec	88.5 MB	QuickTime Movie
3-2.mov	:4 sec	28.3 MB	QuickTime Movie
2-3.mov	:4 sec	28.2 MB	QuickTime Movie
3-1.mov	:4 sec	28.0 MB	QuickTime Movie
1-3.mov	:4 sec	27.9 MB	QuickTime Movie
2-1.mov	:4 sec	27.8 MB	QuickTime Movie
scene3-main.mov	:4 sec	27.8 MB	QuickTime Movie
1-2.mov	:4 sec	27.7 MB	QuickTime Movie
scene2-main.mov	:4 sec	27.6 MB	QuickTime Movie
scene1-main.mov	:4 sec	27.2 MB	QuickTime Movie
main-special.mov	:4 sec	24.5 MB	QuickTime Movie
main-scene.mov	:4 sec	24.2 MB	QuickTime Movie
Special-main.mov	:4 sec	23.7 MB	QuickTime Movie
main-setup.mov	:4 sec	23.0 MB	QuickTime Movie
main-credits.mov	:4 sec	22.9 MB	QuickTime Movie
setup-main.mov	:4 sec	21.9 MB	QuickTime Movie
Credits-main.mov	:4 sec	19.0 MB	QuickTime Movie

Table 2: MPEG 2 Files

NAME	LENGTH	FILESIZE	FORMAT
mainmenu.m2v	:45 sec	38.8 MB	MPEG Movie
mainmenu.aif	:45 sec	8.0 MB	AIFC Audio
Special.m2v	:47 sec	40.0 MB	MPEG Movie
Special.aif	:47 sec	8.4 MB	AIFC Audio
scene 3 (9-12).m2v	:37 sec	34.0 MB	MPEG Movie
scene 3 (9-12).aif	:37 sec	6.6 MB	AIFC Audio
scene 2 (5-8).m2v	:37 sec	33.1 MB	MPEG Movie
scene 2 (5-8).aif	:37 sec	6.6 MB	AIFC Audio
scene 1 (1-4).m2v	:35 sec	31.7 MB	MPEG Movie
scene 1 (1-4).aif	:35 sec	6.2 MB	AIFC Audio
setup.m2v	:34 sec	27.2 MB	MPEG Movie
setup.aif	:34 sec	6.1 MB	AIFC Audio
credits.m2v	:21 sec	11.9 MB	MPEG Movie
credits.aif	:21 sec	3.6 MB	AIFC Audio
3-2.m2v	:4 sec	3.7 MB	MPEG Movie
3-2.aif	:4 sec	752 KB	AIFC Audio
2-3.m2v	:4 sec	3.7 MB	MPEG Movie
2-3.aif	:4 sec	752 KB	AIFC Audio
3-1.m2v	:4 sec	3.7 MB	MPEG Movie
3-1.aif	:4 sec	752 KB	AIFC Audio
1-3.m2v	:4 sec	3.7 MB	MPEG Movie
1-3.aif	:4 sec	752 KB	AIFC Audio
2-1.m2v	:4 sec	3.7 MB	MPEG Movie
2-1.aif	:4 sec	752 KB	AIFC Audio
scene3-main.m2v	:4 sec	3.4 MB	MPEG Movie
scene3-main.aif	:4 sec	752 KB	AIFC Audio
1-2.m2v	:4 sec	3.7 MB	MPEG Movie
1-2.aif	:4 sec	752 KB	AIFC Audio
scene2-main.m2v	:4 sec	3.4 MB	MPEG Movie
scene2-main.aif	:4 sec	752 KB	AIFC Audio
scene1-main.m2v	:4 sec	3.5 MB	MPEG Movie
scene1-main.aif	:4 sec	752 KB	AIFC Audio
main-special.m2v	:4 sec	3.5 MB	MPEG Movie
main-special.aif	:4 sec	752 KB	AIFC Audio
main-scene.m2v	:4 sec	2.5 MB	MPEG Movie
main-scene.aif	:4 sec	752 KB	AIFC Audio
special-main.m2v	:4 sec	3.5 MB	MPEG Movie
special-main.aif	:4 sec	752 KB	AIFC Audio
main-setup.m2v	:4 sec	3.4 MB	MPEG Movie
main-setup.aif	:4 sec	752 KB	AIFC Audio
main-credits.m2v	:4 sec	3.4 MB	MPEG Movie
main-credits.aif	:4 sec	752 KB	AIFC Audio

Table 2: MPEG 2 Files, Continued

setup-main.m2v	:4 sec	3.4 MB	MPEG Movie
setup-main.aif	:4 sec	752 KB	AIFC Audio
credits-main.mov	:4 sec	2.9 MB	MPEG Movie
credits-main.mov	:4 sec	752 KB	AIFC Audio

Adobe Photoshop

Adobe Photoshop was employed to create the menu overlays to be used within the DVD. The overlays were created for all the navigational menus and scene selection video boxes. By using screen captures of each menu, the necessary alignment of the overlays could be determined and developed. Once accomplished, the files were flattened and saved as psd files.

DVD Studio Pro II

The final program to be utilized was DVD Studio Pro II and with it, all of the design elements would be imported and authored into a single sided DVD. In authoring the DVD, a number of tasks needed to be accomplished ranging from setting chapter markers and menu overlays to linking menus and setting their hierarchy. Upon completion the DVD was built and authored to disk.

CHAPTER SEVEN

SELF-DISTRIBUTING *FINDING FIDEL*

Ultimately, it was decided that the best approach for distributing *Finding Fidel* would be primarily through the use of a well-designed self-distribution plan. The plan combines components of both traditional distribution models and key points from the case studies. These key points are addressed below and pertain specifically to self-distribution and/or independent film/DVDs. A noteworthy byproduct of a quality self-distribution plan may be to get picked up by a large distributor, but the only way this would happen for a so inclined independent filmmaker is by getting noticed through a successful “go” at self-distribution. In other words, to establish market success, an independent filmmaker *must* undertake *some* level of self-distribution. All decisions about the self-distribution plan rest on a overriding posit: *treat the film as a product*. This hypothesis is consistent with traditional distribution models, as covered by the literature, and with findings from the case studies.

Treating the Film as a Product

It is imperative, from day one, to treat a film as a product. This insight not only will lead to a better film, but also will allow for the

successful marketing, promotion, and distribution campaign.

Unfortunately, in the making of Finding Fidel, this notion was not realized early on or prior to production being completed. Otherwise, steps would have been implemented earlier in the filmmaking process, such as photographing production stills, utilizing listservs, creating an earlier web presence, identifying a target audience and generating publicity within that group, etc. While the aforementioned techniques have since been implemented into the current distribution model, the point nevertheless cannot be overstated that they should have been applied from day one, not years into the process.

Additional efforts have been employed to date in an endeavor to transform the film into a marketable commodity. Specifically, a website has been designed and developed; a presentation package was created; a target audience has been identified; listservs have been joined, with active participation taking place; sales letters were produced; a DVD was designed, developed, authored, and packaged; and (both solicited and unsolicited) positive media reviews have been received.

Identifying a Target (Niche) Audience

Due to the subject matter of the film, identifying a primary audience -- Cuban-Americans -- was a relatively straightforward process. Demographics specific to the group were examined thoroughly. Through the use of the U.S. Census Bureau data, it was ascertained that, statistically, Cubans have the highest level of education of all the nation's Latino groups. Cuban-Americans also are the oldest (40 years, as opposed to 24) and have the lowest poverty rate among the country's Latino population. The majority of Cuban-Americans live in and around large urban areas including Miami, New York City, Los Angeles, and Las Vegas. Smaller pockets of the population also live throughout the U.S. in midsize urban communities. Furthermore, Cuban-Americans are predominately white Catholics, and evenly distributed in terms of sex (US Census Bureau).

With a clearly defined primary audience, the next step was to consider the methods necessary to reach that group. Through careful examination, several large organizations were identified that are appropriate for targeting, including The Cuban American Foundation and The Center for Cuban Studies. These organizations are extremely well known and hold sway in the Cuban-American community. Also, such groups have a digital presence on the web and utilize that stature

to communicate to members and the community via electronic emails and listservs. They also hold a number of structured, formal events that provide a venue for networking and dissemination of information among the Cuban American community. Quite often, the events focus on Cuban culture as represented through film, photography, poetry, song and dance, and food.

These events also provide opportunities to reach secondary audiences. Essentially, the secondary audiences are comprised of people interested in Cuban culture and other Latin American immigrants. While many cultural differences exist between Caribbean, Central, and South American nations, the film offers a thematic perspective that offers common appeal to persons from all these geographic areas. Finally, the film has a general and broad appeal to people with interests in culture and travel. Forty years of an economic and travel embargo have isolated Cuba, leaving many American citizens curious about the island nation.

Certain characteristics of both the primary and secondary audiences make them ideal candidates for marketing of films on DVD. Few films are geared specifically towards Cuban Americans. Coupled with the fact that Cuban Americans have a higher than average

household income and education level, they are more likely to have DVD players in their homes and the funds necessary to purchase them than many other Latino populations. In addition, secondary audiences who have an interest in culture and travel, and frequently are in a young demographic group are statistically likely to have DVD players in their home or to have ready access to such equipment. Their level of disposable income usually allows for easy purchase of DVDs, and a frequently a desire to take something home from cultural events exists. The small, affordable, interactive nature of DVDs provides an ideal combination.

Communicating the Film, Story, and Idea

As part of the overall distribution strategy, it is essential to communicate with passion and clarity the unique story and idea specific and distinct to the film. In addition, an independent filmmaker generally has a vested interest in conveying this message to certain stakeholders, such as funding agencies, film festival audiences (which contain decision-making, purse-string holding stakeholders), local PBS-affiliates and other local organizations that financially support art and cultural ventures.

Finding Fidel finds itself at the early stages of this process. Exact steps undertaken have included approaching the Center for Cuban Studies (see Appendix A), ITVS (see Appendix B), and the MSU Kresge Art Museum, in conjunction with the East Lansing Film Festival. Future plans include contacting several film festivals and public broadcasting stations, and identifying key funding agencies. In doing so, it will be essential to keep in mind the importance of communicating the film, its story and idea.

In addition, calendar houses theatres will be approached with diligence. These theatres lean toward “art house” ventures, and they importantly have members and reputable media coverage. Such stakes allow for built in, in house advertising and publicity through the membership and media supporters. In addition, such establishments tend to have big followings with pointed interest in “something different” and independent films. In Michigan, the Michigan Theatre in Ann Arbor is but one well-known example. On a similar, but often smaller vein, universities, public libraries, and social clubs (such as Kiwanis or Community Education Foundations), also have many of the same characteristics – a built in audience and advertising lines; a willingness and eagerness to support and participate; and an interest in independent and/or cultural ventures. These paths may offer sales

ventures and opportunities for either fee-based or free viewings. Even in environments in which the viewings would be free (for example, public libraries), the atmospheres tend to be quite supportive and willing to allow for sales prior to or after aforementioned viewings they options should not be overlooked. In addition, since attendance peaks interest and provides free, word-of-mouth promotion in a ready made group, these options should not be overlooked. In approaching all of these groups, the significance of communication the film, its story and idea cannot be overlooked.

Utilizing the Web

As the film will be self-distributed, it is vital to utilize the web. The venue is not only extremely cost effective, but through its use, a worldwide audience of millions may be reached. As such, the web provides a virtual storefront that allows potential customers opportunities to purchase the film/DVD, interact with the filmmaker, learn about the film, and find useful information such as film showings and speaking engagements.

A website for the film was created (www.findingfidel.com) and launched in March 2003. The multi-page site includes; information on

the filmmaker, the film, and Cuba; video clips; an electronic press kit; a bulletin board; an interactive slide show; and a point of purchase.

As part of the overall distribution strategy, attempts will be made to make the site URL known to as many potential costumers as possible. Primary and secondary audiences will be targeted via well-known and highly frequented sites such as www.cubanstudies.org and www.caf.org. To accomplish this, direct links, bulletin boards, and listservs will all be utilized. To reach a broader audience metadata will be employed and key words and phrases will be inserted heavily so that search engines may pick up www.findingfidel.com. The site URL will become disseminated to larger audiences if it is listed in a national, regional, or local papers, or magazines, especially if the title is available on the web and is indexed by established resources. References to the site URL in will be included in all literature, communiqués, business cards, emails, treatments, etc.

Attempts will also be made to sell the film directly to and through web businesses such as www.netflix.com , www.amazon.com and www.ebay.com . As the industry leader in on-line DVD rental, Netflix is constantly seeking to expand its product base. Accordingly, the company often purchases DVDs directly from independent

filmmakers -- that is, of course, if the DVD is professionally packaged and authored. If so, a first time documentary filmmaker can expect to sell 50 to 100 copies for approximately \$5-\$10 each. If the filmmaker has more "notoriety" (for example, through film festivals, media reviews, or publicity), Netflix will purchase more units at a higher price.

With E-Bay, all of the pertinent functions, such as listing the item, collecting monies, shipping the product, etc, must be handled by the filmmaker. The number of units that can be listed at one time also is limited. Amazon, on the other hand, will handle a majority of the pragmatic duties, and the company only requires that the selling party be able to supply a steady stream of packaged product. Because Amazon handles so much of the process, they take a greater share of the gross. For example, on a \$20 DVD, they will collect little more than half. E-Bay, on the other hand, charges a small fee for each sale, usually around \$1 for products selling for under \$20.

Budgeting as a Tool

A realistic, well-thought out budget (Table 3) creates an immeasurably valuable planning tool. It contains sales goals, which in turn are based on all necessary costs in creating and distributing the

film, including salaries and break-even points. The budget offers guidance throughout the entire filmmaking and distribution process. Funding sources, such as grant making agencies, may require a detailed budget as part of their consideration process, and the ability to produce a complete, realistic plan concretely displays to such sources that they are dealing with a party that is capable of carrying through the project. In addition, when addressed and considered from the beginning, the budget assists the filmmaker in consistently treating the film as product, not simply or only a creative venture.

Table 3: Budget

PRODUCTION BUDGET		
TITLE: <u>Finding Fidel, A Young Man's Journey</u>		
WRITER, DIRECTOR, PRODUCER: <u>Jeff Hamlin</u>		
Acct. Number	Description	Budget
01-00	Producer	\$30,000.00
02-00	Writer	\$10,000.00
03-00	Director	\$20,000.00
04-00	Narrator	\$1500.00
05-00	Music Rights	\$12,500.00
TOTAL ABOVE THE LINE (Pre-Production)		\$74,000.00
BELOW-THE-LINE		
06-00	Tape Stock	\$1500.00

07-00	Camera/Tripod	\$3500.00
08-00	Air Fare	\$2000.00
09-00	Food	\$4500.00
10-00	Lodging	\$2500.00
11-00	Visas	\$350.00
12-00	Boat Trips/Gas	\$2500.00
13-00	Legal	\$2500.00
14-00	Medical	\$250.00
15-00	Audio Microphone/Cable	\$400.00
16-00	Miscellaneous	\$1200.00
TOTAL BELOW THE LINE (Production)		\$21200.00
POST-PRODUCTION		
17-00	Edit Suite Rental (in-kind)	\$8000.00
18-00	Sound Mix (in-kind)	\$500.00
19-00	Audio Studio (in-kind)	\$500.00
TOTAL POST-PRODUCTION		\$9000.00
DVD REPLICATION/PACKAGING		
20-00	3000 DVD-R (includes artwork and packaging)	\$7500.00
TOTAL DVD REPLICATION/PACKAGING		\$7500.00
TOTAL BUDGET		\$111,700.00

Distribution Goal

The overall distribution goal is to sell a total of 5585 units over a period of two years. If 2185 units were sold in this timeframe, the filmmaker, whom is the sole stakeholder, would break even. 2185 units sold, however, would not address any salary costs for the director, writer, or producer. This figure is based on total expenses of \$43,700., which addresses actual costs incurred. To recoup a salary, and in essence gain this amount as profit, the aforementioned 5585 units must be sold, with an average unit price of \$20 ($5585 * 20 = \$111,700$).

CHAPTER EIGHT

CONCLUDING THOUGHTS: *What I have learned, what I would differently*

As a result of my personal experiences and research, I have concluded that to be truly successful, today's independent filmmaker must recognize the importance of **treating their film as a product**. I have come to realize that doing so only increases the overall creativity, quality, and ultimately, the marketability, of their film. While I stated this posit earlier, and hold it as the guiding principle in distributing an independently made film and as my primary lesson learned.

Had I treated my film more like a product from its formative stages, I would have been in a better position to sell copies at the premiere. Obviously, if I had the opportunity to undertake the process over again, I would do things differently, assuring that I was better prepared for selling at the premiere. I would have created a mailing list, I would have used the event as a parlay into a college tour, I would have recorded and saved the media reports for future press releases and publicity. In other words, I would have taken much better care to treat the overall film and showing as a business endeavor.

While I have several other examples of lessons learned from my experiences and research, they demand no particular order. Still, an important – and truly tough one for me to absorb – was the realization that a certain level of **self-confidence** is absolutely necessary. No one is going to be as passionate about your film as you are. Therefore, you need to be able to self promote the heck out of it without being, or sounding like, a totally self-absorbed jerk. While it is acceptable to “be yourself,” which may mean being shy, timid, or eccentric, you must be able to put aside any self esteem issues that hinder you from being able to sell your film, which equals “selling” yourself, or your image. You need to be able to ask people for \$20 per copy without being ashamed, self-deprecating, or flinching. If you treat your film as a product, the self-confidence falls into place.

Another important lesson that I have learned is that **nothing will ever be perfect**. Trying to make everything just right has paralyzed me at times. The perfect becomes the enemy of the good when you become so focused on perfection, that you never are able to finish a project, film, DVD, etc. Perhaps, if I had spent more initial time on **planning**, the fixation on perfection would not have become such a stumbling block. I now cannot understate the importance of proper *Planning, planning, and planning* ... In creating the DVD, I spent

a great deal of precious time doing double work. Had I spent more time at the beginning of the project, simply planning, sketching, and storyboarding, I would have saved myself a great deal of grief later in the process.

I also found that to be successful, an independent filmmaker needs to be a **jack-of-all-trades**. He/she needs to have a serious understanding of audio, video, compression, design, budgeting, marketing, etc. While no one person can be an expert in everything, a broad base area of knowledge is important. That is not to say that I do not believe in working with others. In fact, I would argue that one should work smarter, not harder. If you can find someone to do quality work (audio recording, for example), great -- they probably have a better understanding, a broader skill set, more tools, etc. Your broad knowledge of the filmmaking techniques, however, will allow you to ask exactly for what you need, saving time and money.

Looking back, it would have been nice to **budget money** for an original musical score for both the film and DVD. I also would have budgeted for a "known" voice to be the narrator, perhaps someone with a connection to Cuba, such as a celebrity like Andy Garcia or Pico Turino. Overall quality and marketability would have been enhanced

with an additional "in" to the greater Cuban community and resellers like Netflix, Amazon, etc. I also would have budgeted for marketing, promotion, etc – a novel concept.

The last **piece of advice** that I would pass along to aspiring independent filmmakers is imperative: **spend time researching the market**. Spend *a lot of time* and energy on identifying your audience and the ways of getting your film to them. I would go so far as to recommend that no film be made unless a specific audience can be clearly identified. My reasoning is this -- anyone can make a film. As the thesis pointed out, 4000 independents were on the market in 2003. The trick is to make a film and sell it to an audience. Better yet, find an audience and *then* make your film! To become prepared, I would recommend taking marketing classes, researching marketing techniques, and gathering as much information on the topic as possible. Look at what others have done, and glean from them what will work for you. While I would encourage everyone to follow his or her dreams, I also would suggest keeping a realistic goal in mind. Find an area of interest and pursue it with the maximum amount of time, energy, and money possible. Nothing is going to drop in your lap, so you must be willing to work extremely hard in going after your goals,

whatever they may be. Anything worthwhile is going to take a long time, for if it was easy, everyone would be doing it!

APPENDIX A

APPENDIX A
Presentation Package Center For Cuban Studies

Carmen Garcia
Center for Cuban Studies
1500 18th Avenue
New York, New York. 10027

Dear Ms. Garcia,

Have you ever thought of traveling to Cuba on a 25ft sailboat for the purpose of finding Fidel Castro? Jeff Hamlin did...

"Hey mom and dad...I'm going to Cuba. Probably be back in a week...or two. Love you" And so begins the feature length documentary, *Finding Fidel*. After leaving his parents a quick and cryptic phone message, Jeff Hamlin embarks on an adventure of a lifetime. What begins as a sailing trip to communist Cuba becomes a six year adventure as a young man becomes obsessed with tracking down the infamous Cuban dictator; Fidel Castro.

Directed and Produced by Michigan native Jeff Hamlin, *Finding Fidel* has recently been released on DVD and will undoubtedly appeal to your audience. The film has received critical acclaim before sold out audiences at both the East Lansing Film Festival and Kresge Art Museum. However, while highly successful, the film has never been marketed commercially. Now is your chance to reap the financial benefits by offering this unique product to your costumers. For only \$49.95 per copy, you can purchase the rental rights to *Finding Fidel*. For re-sale purposes, additional copies of the film may be purchased for \$12.95 each.

The DVD includes a feature length narrative documentary in addition to several special features: Directors commentary, Spanish/English Narration, Interview with the Director, a Ten Minute Film School, and Interactive Menus. The DVD has been professionally packaged and comes with unique artwork imprinted upon color inserts as well as color silkscreen DVD faces.

While titled *Finding Fidel*, much of the narrative documentary focuses on Cuba, its people, and their colorful way of life. Hamlin includes vibrant images of carnival in Santiago, musical groups playing rumba and sol, traditional santeria ceremonies, and first hand footage of Cuba's infamous "Nuclear City." And a young man's journey becomes much more than a trollop through an unknown country. His journey leads to self-discovery and coming-of-age in the classic sense and he finds much more than a charismatic leader complete with both fallacies and fluff. In the end, he discovers the exuberance, perseverance, and joy of the Cuban people and culture.

For more information about the film including video clips, press kit, reviews, etc., please visit www.findingfidel.com

Sincerely,

Jeff Hamlin

APPENDIX A

Finding Fidel Fact Sheet

Movie Title: Finding Fidel

Year: 2002

Theatrical Release Date: None

Film Festival Debut: March 2003

DVD Release Date: May 2004

Director: Jeff Hamlin

Producer: Jeff Hamlin

Production Company: Fej Films, LLC

MPAA Rating: None

Genre: Documentary

Keywords: Cuba, Fidel, Castro, Carnival, Santeria, Trinidad, Havana, Santiago, Moncada, Revolution, M26, Rumba, Sol, Documentary, Travel, Adventure.

DVD Technical Details:

- Region 0 (all regions)
- Faux Letter Box 1.33:1
- Color
- 4 Audio Tracks
- Feature Runtime: 60 minutes
- Special Features: Animated Menus, Directors Commentary, Spanish/English Narration, Interview with Filmmaker, and Ten Minute Film School
- Number of Disks: 1 single sided/single layered
- Languages: English/Spanish
- Subtitles: None
- Closed Caption: No
- UPC: 8033236100298

Brief description I (60 words): *Finding Fidel* is a narrative documentary that takes you on a visual journey from Havana to the interior of Cuba, experiencing the faces, customs, and rhythms of its people. What begins as a spur-of-the-moment trip by sailboat to find Fidel Castro becomes a life-changing event that spans the course of six years and is indeed, the journey of a lifetime.

Brief description II (120 words): *Finding Fidel* is a narrative documentary that takes you on a visual journey from Havana to the interior of Cuba, experiencing the faces, customs, and rhythms of its people. What begins as a spur-of-the-moment trip by sailboat to find Fidel Castro becomes a life-changing event that spans the course of six years and is indeed, the journey of a lifetime. And a young man's journey becomes much more than a trollop through an unknown country. His journey leads to self-discovery and coming-of-age in the classic sense and he finds much more than a charismatic leader complete with both fallacies and fluff. In the end, he discovers the exuberance, perseverance, and joy of the Cuban people and culture.

APPENDIX A

TREATMENT

About the Film:

Finding Fidel is a digitally shot documentary that was filmed over a period of six years (1994-2000). Directed and Produced by Jeff Hamlin, the film takes a unique look at Cuba, its people, and their dictator - Fidel Castro. While shooting the film, Hamlin chose to live amongst the Cuban people, which afforded him the opportunity to gain a true insight into their colorful culture. During his travels, Hamlin was fortunate enough to film numerous historic events including Pope John Paul's trip to Cuba, the "special period", and numerous speeches by Fidel Castro. However, Hamlin's favorite subject was the Cubans themselves and his love of the people comes through via his colorfully composed images; children smiling, couples dancing, and families playing together.

Adding to the colorful images of Cuba and its people, Hamlin includes archival footage of the U.S.S Maine in Havana Harbor, Teddy Roosevelt and the Rough Riders, San Juan Hill, Flugenica Batista, Fidel Castro and his revolution, and the Bay of Pigs Crisis. Edited into the film, the footage plays an integral part in helping to establish the history and events that lead to Fidel Castro's rise to power.

The musical score of the film was composed and recorded by Cuban born musician Celia Gonzalez. Ms. Gonzalez has performed with Gloria Estafan and the Miami Sound Machine and is recognized for her powerful singing voice and dazzling guitar play. Furthermore, she has played backup singer for Celia Cruz and several other Cuban performers.

The narrator of the film was John Morrison. Mr. Morrison is a professional voice over artist and has performed on award winning documentaries including *Dent de Lyon* and *The Lottery for life*.

The film was completed in 2002.

Target Audience:

The target audience includes the Cuban community living in the United States. This community has been underserved as few films have given a voice to their unique and diverse culture, heritage, traditions, beliefs, and values. What programs do exist tend to focus on pre-revolutionary Cuba and or the Cuban-American community, a conservative political action committee seeking to restore their positions of power and prestige in a post-Castro Cuba. The average Cuban, whether a naturalized citizen of the United States or a recent immigrant, has little to view in the way of programming that offers a true expose` into their culture. So frequently, Cuban Americans must hold their heads in shame under the prevue of popular culture and political representation within the United States - they either are deemed corrupt Batista supporters or closet Castro confidantes, neither of which offers a kind or fully human representation beyond a stereotype or a caricature. The movie attempts to embrace Cubans as Cubans - full humans, with experiences, lifestyles, cultures, joys and tragedies that transcend political agendas.

APPENDIX A

In addition, the film may have particular, yet secondary, appeal to this country's growing Latino culture in general. As with the Cuban American population, these persons also tend to be underserved. While many cultural differences exist between Caribbean, Central, and South American nations, the film offers a thematic perspective that may offer common appeal to persons from all these geographic areas.

Finally, the film may have a general and broad appeal to the viewing public at large. Forty years of an economic and travel embargo have isolated Cuba, leaving many American citizens curious about the island nation.

Target Platform:

The target platform is a DVD readable by all North American Players.

Scope:

Finding Fidel is an interactive DVD that contains a feature length (60 min) narrative documentary film. In addition to the documentary, the DVD also contains: Directors commentary, Spanish/English Narration, Interview with the Director, a Ten Minute Film School, and Interactive Menus. The DVD has been professionally packaged and comes with unique artwork imprinted upon color inserts.

Video/Audio Elements:

The film was shot with a digital video camera and has exceptional resolution and quality. The video elements within the DVD are the sole property of Jeff Hamlin and were recorded by him while in Cuba. The DVD does contain archival footage, which is public domain and was obtained through the Library of Congress and the University of Miami Special Collections Library. The natural sound of the film is the sole property of Jeff Hamlin and was recorded while on location in Cuba.

Cuban born composer Celia Gonzalez recorded the musical elements within the film. As such, the rights have been purchased and secured allowing for worldwide distribution. The rights have also been secured for the voice over narration, which were recorded by John Morrison.

Defining Elements:

The defining element of this project is the unique nature of the documentary. It tells the story of a young American student who throws caution into the wind and actively searches for Cuban dictator Fidel Castro. While filming, the American lives amongst the people allowing him to film the "real Cuba." The film covers a six-year time span and takes the viewer into a world rarely seen before; the world of every day Cubans and their colorful culture and spirited way of life.

APPENDIX B

APPENDIX B
ITVS Open Call Submission

PART I: COVER SHEET

CONTACT INFORMATION

Name: Jeff Hamlin

Production Entity: Fej Films

Co-Applicant:

Mailing Address:

2813 Greenbriar Ave.

Lansing, MI 48912

Daytime Phone: 517.483.1981 **Evening Phone:** 517.267.8770

Fax:

Email: hamlinj1@msu.edu

BACKGROUND INFORMATION

Gender:

Ethnicity/Race:

PROGRAM INFORMATION

Program Title: Finding Fidel: A Young Man's Journey Through Cuba

Brief Summary of Program

What begins as a sailing trip to communist Cuba becomes a six-year adventure as a young man becomes obsessed with tracking down Fidel Castro.

If this is your first time applying, where did you hear about ITVS Open Call?

Yes. I heard about it through the Independent Film Project

Length: 56:40

Genre: Documentary

Shooting Format: DV

WORK SAMPLES

1. Completed Work - 1 copy mandatory

Title: We Were Known As: African Americans in Lansing

Applicant's Role: co-producer

2. Work-in-Progress - 1 copy required

Title: Video Selects of Proposed Program (Finding Fidel)

Length: 14:29

Applicant's Role: producer-director

BUDGET INFORMATION

TOTAL BUDGET: \$111,700.00

TOTAL SPENT TO DATE, IF ANY: \$30,000.00

PENDING FUNDS: \$0.00

CASH SECURED: \$0.00

REQUEST TO ITVS: \$81,700.00

APPENDIX B

LEGAL INFORMATION

I certify that I have reviewed the guidelines and warrant that I meet all ITVS eligibility requirements. The information in this application, including all attachments and supporting materials, is true and correct to the best of my knowledge. If funded and contracted by ITVS, my proposed program will be completed within one year.

APPLICANT SIGNATURE

DATE SIGNED

CO-APPLICANT SIGNATURE

DATE SIGNED

Above applicant(s) will be signatories to ITVS contracts, if offered.

MAIL ALL MATERIALS AND TAPES IN ONE PACKAGE TO:

ITVS

OPEN CALL 2004 SPRING REVIEW

501 YORK STREET

SAN FRANCISCO, CA 94110

ALL MATERIALS MUST BE RECEIVED AT THE ITVS OFFICE BY 5 p.m.
February 12, 2004.

- * ITVS will NOT accept applications that are faxed, late, incomplete or not prepared according to guideline specifications.
- * ITVS is not responsible for loss of or damage to application materials due to shipping, storage or presentation.
- * DO NOT CALL THE OFFICE to inquire about the status of your application.
- * NOTIFY ITVS of changes on your mail address, telephone and email address ASAP.

APPENDIX B

PART II: PROGRAM DESCRIPTION

A. Synopsis

"Hey mom and dad, I am going to Cuba. Probably be back in a week or two. Ok, love you lots..."

...And so begins the narrative documentary *Finding Fidel*. After leaving his parents a quick and cryptic phone message, filmmaker Jeff Hamlin embarks on an adventure of a lifetime. What begins as an unplanned and illegal sailing trip to communist Cuba becomes a six-year life and perspective changing adventure as a young man becomes obsessed with tracking down the infamous Cuban dictator, Fidel Castro.

Although titled *Finding Fidel*, much of the documentary truly focuses on Cuba, its people, and their colorful way of life. And a young man's journey becomes much more than a trollop through an unknown country; his journey leads to self-discovery and tells a coming-of-age story in the classic sense. The filmmaker ultimately "finds" the charismatic leader, complete with both the fallacies and fluff that go along with being a dynamic, undisputed, loved *and* hated leader. Ultimately, though, he discovers and portrays much more – the exuberance, perseverance, and joy of the diverse Cuban people and their culture.

B. Treatment

The documentary film begins showing a young American man setting out on an inquisitive and illegal sailing journey to Cuba, and chronologically follows his exploits in the island nation over a six-year period of time. Throughout this time, the young man's love for the nation, its people and culture grow. He realizes that much of what he has heard in his own country regarding Cuba provides a single viewpoint, frequently laden with propaganda. He becomes enraptured with the dynamic, charismatic and much admired dictator, Fidel Castro, and begins the pursuit of "Finding Fidel."

However, throughout his journey, he unknowingly and unwittingly becomes connected, enamored with the Cuban people; living with them, staying in their homes, sharing their meals, tickling their babies, and flirting with their daughters. Slowing learning, but also being accepted into, their culture. Barriers of capitalist America and communist Cuba are slowly eroded away, and he discovers the humanistic face of the Cuban people. The Cuban people also discover a free spirited, friendly face rather than a bullying, wealthier neighbor from the north.

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During his journey traversing the countryside to Find Fidel, key events undermine the filmmaker's idealistic view of not only the nation's enigmatic and admired leader, but also of the oftentimes tyrannical system which ultimately provides a duplicitous front to "the people" for whom the revolution was meant to serve.

He finds Cubans being detained for having a few ounces more than their allotment of cheese and being discriminated against because they are Cubans, rather than higher paying tourists. He finds himself having more rights than the average Cuban, and is stunned and dismayed by the hypocrisy.

And yet, despite the obvious and sometimes mammoth shortcomings of living in Communist Cuba, the filmmaker discovers what is behind the visceral and profound reverence in which Castro is held by his people. Regardless of the societal discrepancies which the filmmaker faces and sees Cubans facing, Cubans remain ever faithful to 'el jefe' because he gave them what they for so long wanted most – freedom and independence from foreign domination. And more importantly and compelling than that, he gave them pride in being Cuban!

These are longings that we all have at our core – to have freedom, and independence from oppression, a certain quality of life that does not necessarily add up to money in the bank or a certain food on the table. Ultimately, this film addresses the Cuban version of this theme, in addition to telling a coming-of-age tale of a young, American man.

During the course of filming, the filmmaker embraces a stylistic approach in which he fully engages with his subjects, allowing him to capture up close, intimate, and realistic vantages of their lives and culture. This style of shooting is significant to the film because it lends to the filmmaker's credibility as he portrays a deep involvement, empathy, and knowledge of the people and culture. It also creates an environment for the viewer to become fully involved and attached with the Cuban people and their lives.

To capture this stylistic approach most effectively, the filmmaker chose to utilize a Mini-DV camera. The small format camera diminished the physical barrier between filmmaker and subject allowing for the recording of very close and intimate images. The smaller format also afforded the filmmaker the opportunity to attend several Castro speeches. Its demure nature made for a less imposing presence at the highly secure venues.

The proposed running length of Finding Fidel 56:40. This format will best allow the filmmaker to tell the six-year story in an evenly paced and timely manner. The time frame also helps maintain the continuity of the stylistic

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approach, whereas images are presented methodically and rhythmically, symbolic perhaps of day-to-day Cuban life.

C. Target Audience

The target audience includes the Cuban community living in the United States. This community has been underserved by public television, as few programs have given a voice to their unique and diverse culture, heritage, traditions, beliefs, and values. What programs do exist tend to focus on pre-revolutionary Cuba and or the Cuban-American community, a conservative political action committee seeking to restore their positions of power and prestige in a post-Castro Cuba. The average Cuban, whether a naturalized citizen of the United States or a recent immigrant, has little to view in the way of programming that offers a true expose` into their culture. So frequently, Cuban Americans must hold their heads in shame under the prevue of popular culture and political representation within the United States – they either are deemed corrupt Batista supporters or closet Castro confidantes, neither of which offers a kind or fully human representation beyond a stereotype or a caricature. The movie attempts to embrace Cubans as Cubans – full humans, with experiences, lifestyles, cultures, joys and tragedies that transcend political agendas.

In addition, the film may have particular, yet secondary, appeal to this country's growing Latino culture in general. As with the Cuban American population, these persons also tend to be underserved. While many cultural differences exist between Caribbean, Central, and South American nations, the film offers a thematic perspective that may offer common appeal to persons from all these geographic areas.

Finally, the film may have a general and broad appeal to the viewing public at large. Forty years of an economic and travel embargo have isolated Cuba, leaving many American citizens curious about the island nation.

D. Program Relevance to Public Television

In keeping with the goals of public television, *Finding Fidel* seeks to bring forward the voice of a people too often represented from a single viewpoint. Through a creative and sometimes risky manner, the filmmaker presents a unique look into communist Cuba and its culturally diverse people. Furthermore, the program seeks to foster public discourse by drawing into question America's foreign policy and xenophobic writing of history.

APPENDIX B

The filmmaker believes that the vision of public television and the scope of his film are much aligned. Public television, therefore, offers the most compelling venue for this story.

E. Project Status

The project is currently in post-production. As such, the film has been edited to content but is still in need of a narration track.

PART III: PRODUCTION PERSONNEL

Jeff Hamlin is the writer, director, producer, videographer, and editor of *Finding Fidel*. He is a graduate of Michigan State University where he studied Digital Media Design and Technology. While attending Michigan State, he was active in the filmmaking community and worked extensively with the East Lansing Film Festival. Since graduation, Hamlin has worked for a public television affiliate and as a freelance producer, allowing him to focus much of his time and energy on Cuba. He is currently employed as an instructor with the Motion Picture Program at Lansing Community College where he is able to share his passion and love of filmmaking.

PART IV: SAMPLE WORK AND WORK IN PROGRESS TAPE

Sample Tape:

The sample work tape includes a program entitled, *We Were Known As: African-Americans in Lansing*. The film provides a nostalgic snapshot of African American life in Lansing, Michigan from the mid-1930s to the mid-1970s. In conveying the story, the filmmakers chose to utilize archival photographs and film, formal interviews, b-roll footage, and motion graphics. The length of the sample tape is 26:46

The sample tape relates to the proposed program in a few manners. Both films represent diverse cultures from a particular geographic setting. Both films also speak to communities that traditionally are underserved. On a broader note, the sample tape represents a well-received program that was successfully produced for Public Television audiences. In addition, the filmmaker's role in the making of this program was critical. He served as Co-Producer, Editor and Motion Graphics Artist.

Work in Progress Tape:

The work in progress tape is comprised of select video clips that are representative of the master source tapes and filmmaker's stylistic approach.

APPENDIX B

The work in progress tape also includes some archival footage that will be used in the completed program. Below is a list of video selects:

- Traditional Afro-Cuban Dance (Niquero, Cuba)
- Carnival and Conga (Santiago, Cuba)
- Musical Group (Cienfuegos, Cuba)
- Rumba Dance (Cienfuegos, Cuba)
- Castro Speech (Santiago, Cuba)
- Street Scenes (Trinidad, Cuba)
- Archival Footage
- Musical Montage

APPENDIX C

APPENDIX C
RECRUITMENT LETTER FOR FILMMAKERS/INDUSTRY
PROFESSIONALS

Dear Mr/Mrs. _____

My name is Jeff Hamlin and I am a graduate student at Michigan State University studying Digital Media Design and Technology. As such, I am in the process of conducting research for my written thesis. The title of my work is entitled "The process and methodology of distributing independent films on DVD."

In researching this project, I have concluded that interviews with industry experts, such as yourself, would allow me to further understand the nature of the motion picture industry and to set a benchmark from which to establish my own theoretical model.

With that said, I would like to know if you would be willing to participate in my research project. My research will be in an interview format and should last 20 to 30 minutes. If the interview goes longer than that, a break will be provided so that fatigue does not become a factor. The interview will be conducted between you and I and will be audibly recorded so that I can review your answers carefully. Depending on your desire, the results of our interview can be reported so that you receive full accreditation or remain anonymous. Also, as per University guidelines, the audio recordings will be kept for a period of three years upon completion of the thesis. To protect your confidentiality rights, the audiotapes will be kept in a locked cabinet accessible to only the primary and secondary investigators.

Finally, if during the interview there are questions you are not comfortable answering, you are free to skip them. You may also choose to terminate the interview at any time you desire.

Interview Specifics:

- 20-30 minutes in length
- Audibly recorded
- Performed via the phone
- Conducted between Jeff Hamlin and yourself
- Strict confidentiality or full accreditation

If you have any questions or concerns regarding your rights as a study participant, or are dissatisfied at any time with any aspect of this study, you may contact - anonymously, if you wish - Peter Vasilenko, Ph.D., Chair of the University Committee on Research Involving Human Subjects (UCRIHS) by phone: (517) 355-2180, fax: (517) 432-4503, email address: ucrihs@msu.edu, or regular mail: 202 Olds Hall, East Lansing, MI 48824.

I hope you will consider my request to participate in this project. If you are willing to be interviewed, please review the attached consent form and fill it out in its entirety and fax it to (517)-483-9781. I will need a signed copy before we can proceed further.

Thank you for your time and I look forward to hearing from you.

Sincerely,

Jeff Hamlin

APPENDIX D

APPENDIX D

INTERVIEW INSTRUMENT

1. How important do you believe the Internet is to self-distributing independent films?
FOLLOW-UP QUESTIONS
2. In your opinion, what genres are the most marketable, horror, action, comedy, documentary, drama, etc? FOLLOW-UP QUESTIONS
3. How important do believe it is for an independent filmmaker to have an identifiable target audience in mind before he/she starts filming? FOLLOW-UP QUESTIONS
4. In you opinion, what is the most difficult facet of self-distribution? FOLLOW-UP QUESTIONS
5. Do you believe that shooting formats make a difference when it comes to self-distributing an independent film? FOLLOW-UP QUESTIONS
6. What is your opinion on film festivals as it relates to self-distribution? FOLLOW-UP QUESTIONS
7. To make a DVD more marketable, what do you believe are the most important features an independent filmmaker should include? FOLLOW-UP QUESTIONS
8. Concerning ordered selling, should a self-distributor follow this established industry norm or think more out of the box? FOLLOW-UP QUESTIONS
9. How much of an independent films total budget do you believe should be spent on marketing, advertising, and promotion? FOLLOW-UP QUESTIONS
10. What advice would you give to an independent filmmaker thinking about self-distributing his/her film on DVD? FOLLOW-UP QUESTIONS

END OF INTERVIEW

APPENDIX E

APPENDIX E

Consent Form

PROJECT TITLE: *The Process and Methodology of Distributing Independent Films on DVD*

Principal Investigator:
Brian Winn
420 Communication Arts Building
East Lansing, Michigan. 48824
(517) 353-5497
winnb@msu.edu

Secondary Investigator:
Jeff Hamlin
1239 Blake Ave.
Lansing, Michigan. 48912
(517) 267-8770
hamlinj1@msu.edu

Purpose of the Research

You are being asked to volunteer for a research project. Your experience as an independent filmmaker and/or a professional working within the motion picture industry gives you expertise that will assist in my exploration of the distribution process. The research will be conducted via telephone interviews and should last no more than thirty minutes.

A total of ten independent filmmakers and/or professionals from the motion picture industry will participate in the interview sessions.

Procedures

The secondary researcher will ask you a series of questions pertaining to the distribution process. You will be encouraged to elaborate as much as possible on each topic or as much as you deem fit to provide an adequate response. The session will be audibly recorded so that your answers may be more carefully examined. As per University guidelines, the audiotapes will be kept in a secure location for a period of three years upon completion of the project. In that time, the audiotape will only be available to the primary and secondary investigators. After a period of three years the audiotapes will be destroyed.

Foreseeable Risks or Discomforts

Participation in this research poses minimal risk to you. If you feel uncomfortable at any time during the interview, you may immediately end the discussion with no questions asked. All efforts will be made to keep the interview less than thirty minutes.

Benefits

This research will give you the opportunity to assist in the development of research that could be beneficial to both educational and professional communities.

Voluntary Participation/Withdrawal

Your participation in this interview session is voluntary. You have rights as a research Volunteer. You may refuse to participate before the study begins, discontinue at any time, or skip any question that makes you feel uncomfortable. There will be no penalty for refusal to participate.

Please feel free to ask questions concerning the study, both before agreeing to participate and during the course of the research study.

Confidentiality

Your privacy will be protected to the maximum extent allowable by law. Your name will not be associated with the detailed findings and all original recordings will be kept in a locked desk drawer.

APPENDIX E

Confidentiality Alternative

Although it is normal for research results to be reported anonymously i.e., via a fictitious first name, you have the choice to be cited/accredited by your real name. If you would prefer to be cited by name rather than by a fictitious first name in reporting of the interview case study results, please indicate by placing a check mark on the appropriate line at the bottom of this consent form. If you choose to be cited by name rather than by a fictitious first name, the researcher will verify this preference once more at the end of the interview.

Audio and Video Recording

The interview will be recorded on audiotape and kept in the possession of the secondary investigator. Only your first name will be used during the interview. When writing up the results, real first names will be replaced by fictitious first names.

Contact Persons

If you have any questions about this study, please contact the principle investigator:

Brian Winn
420 Communication Arts Building
East Lansing, Michigan. 48824
(517) 353-5497
winnb@msu.edu

If you have questions or concerns regarding your rights as a study participant, or are dissatisfied at any time with any aspect of this study, you may contact – anonymously, if you wish – Peter Vasilenko, Ph.D., Chair of the University Committee on Research Involving Human Subjects (UCRIHS) by phone: (517) 355-2180, fax: (517) 432-4503, e-mail: ucrihs@msu.edu, or regular mail: 202 Olds Hall, East Lansing, MI 48824.

Statement of Consent

_____ I voluntarily agree to participate in this study.
_____ I am willing to have this interview session recorded on audiotape.
_____ I consent to have my comments included in the written summary of the session.

Select only one

_____ I consent to have my real name included in the written summary of the session.
_____ I consent to be identified by a fictitious name in the written summary of this session.

Name: _____
Signature: _____
Date: _____

You will receive a copy of the signed and dated consent form.

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