

Which feature films travel within Europe?

A report by Dr Huw Jones for the MeCETES team meeting

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Introduction

Over the past two months, we have collected and analysed data from industry reports and other publically available databases in order to explore recent trends in European film production, distribution and consumption.

The following is a list of our main data sources and some of the trends we have been able to analyse:

- European Audiovisual Observatory (OBS) – *Focus: World Film Market Trends, 2005-13*:
 - Films produced in the EU27, 2005-12
 - Domestic films, co-productions and documentaries produced in EU27, 2005-12
 - Admissions in the EU27, 2005-12
 - Market share for European films, US and rest of world in EU, 2005-12
 - Market share for domestic and non-domestic films in EU27, 2005-12
 - Number of screens, gross box office and average ticket price in EU27, 2005-12

- LUMIERE database:
 - Admissions in 36 European territories for 4,070 films produced in EU27 (44.6% of all films produced in EU27), 2005-12

- BFI/UK Film Council:
 - Production and UK spend for UK films, 2005-12
 - General information (e.g. category, production company, producer, director, actors, distributor, genre) on 1,479 films produced in UK, 2003-13

- Danish Film Institute:
 - Admissions and box office takings for 1,617 films released in Denmark, 2005-11

- Box Office Mojo:
 - Box office takings for top 200 UK films in EU market, 2005-12
 - Box office takings for all films released in UK cinemas, 2005-13

In this report, I will use this data to try and answer one of the central questions of the MeCETES project: which European films have successfully travelled to other European countries?

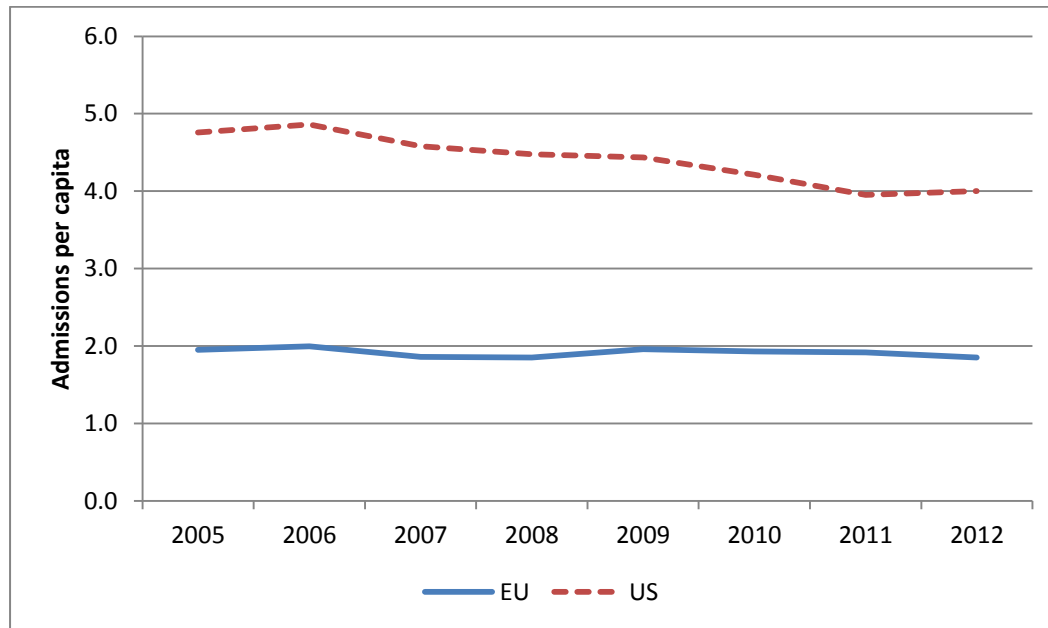
Of course, it is difficult to provide a definitive answer to this question at this early stage in the project, for we have only had access to data on *cinema* admissions. A more comprehensive response would require us to obtain and analyse data on other platforms, such as television, DVD or VOD.¹ Nevertheless, the data on cinema admissions provides a good foundation on which to build.

¹ A recent EU report (2014: 5) found that across Europe, 87% watch films in cinema, 90% on TV and 67% on DVD. 68% of film viewers said they downloaded free films, and 56% said they streamed free films.

Cinema admissions within the EU

First, let us examine some general trends in European cinema admissions. According to data from the OBS, cinema admissions in the EU averaged 938m per year during the period 2005 to 2012. Admissions rose during the period by 40m (a 5% growth), yet this increase was negligible in per capita terms.² EU citizens visited the cinema about half as many times as US citizens – the average EU citizen went to the cinema 1.9 times per year, compared with 4.4 times in the US. However, this gap has narrowed in recent years, due to an 11% decline in US ticket sales since 2005.

Figure 1: Cinema admissions per head of population in the EU and US, 2005-12. (Source: OBS)

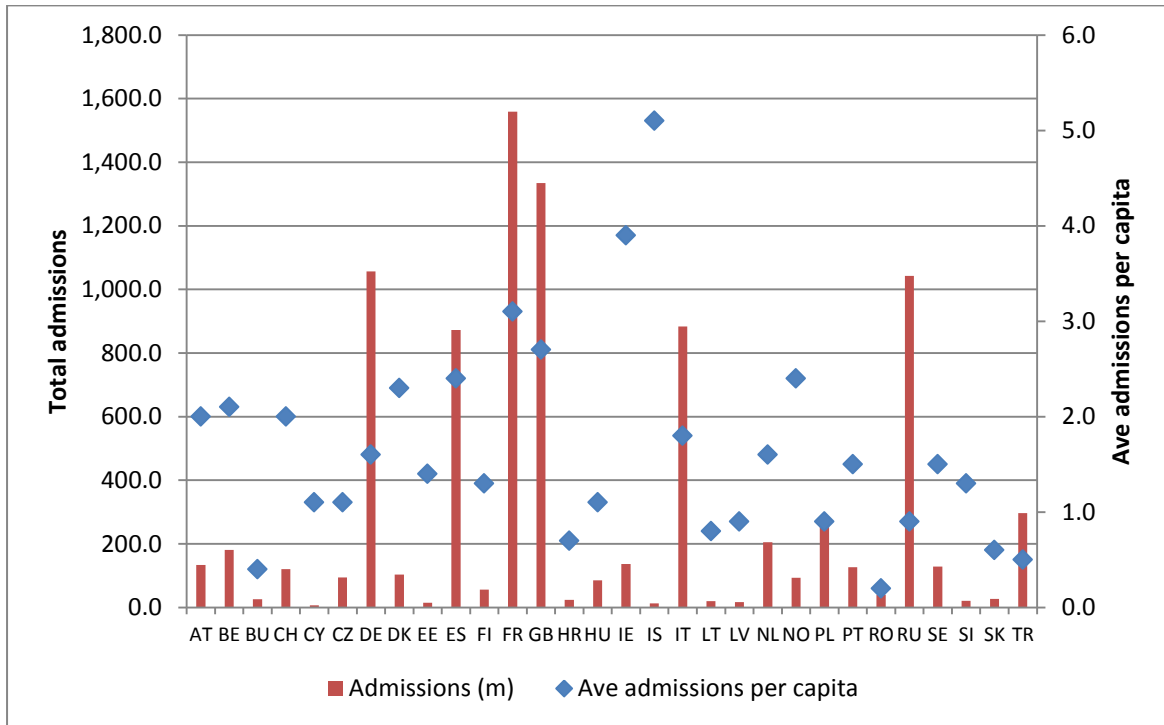


² The latest OBS figures estimate that in 2013 cinema admissions in the EU fell by 4.1% to 908 tickets sold. The 2012 admission figure has been revised to 947m to take into account new member states.

France achieved the highest overall cinema admissions (1,559m) in the period 2005-12, followed by Britain (1,335m), Germany (1,056m) and Russia (1,042m).

Iceland had the highest admissions per capita (5.1), followed by Ireland (3.9), France (3.1) and the United Kingdom (2.7). The EU average was 1.9 admissions per capita (1.6 in the EUR36). The lowest per capita admissions were in Romania (0.2), Bulgaria (0.4) and Turkey (0.5).

Figure 2: Cinema admissions in EUR36, 2005-12. (Source: OBS)

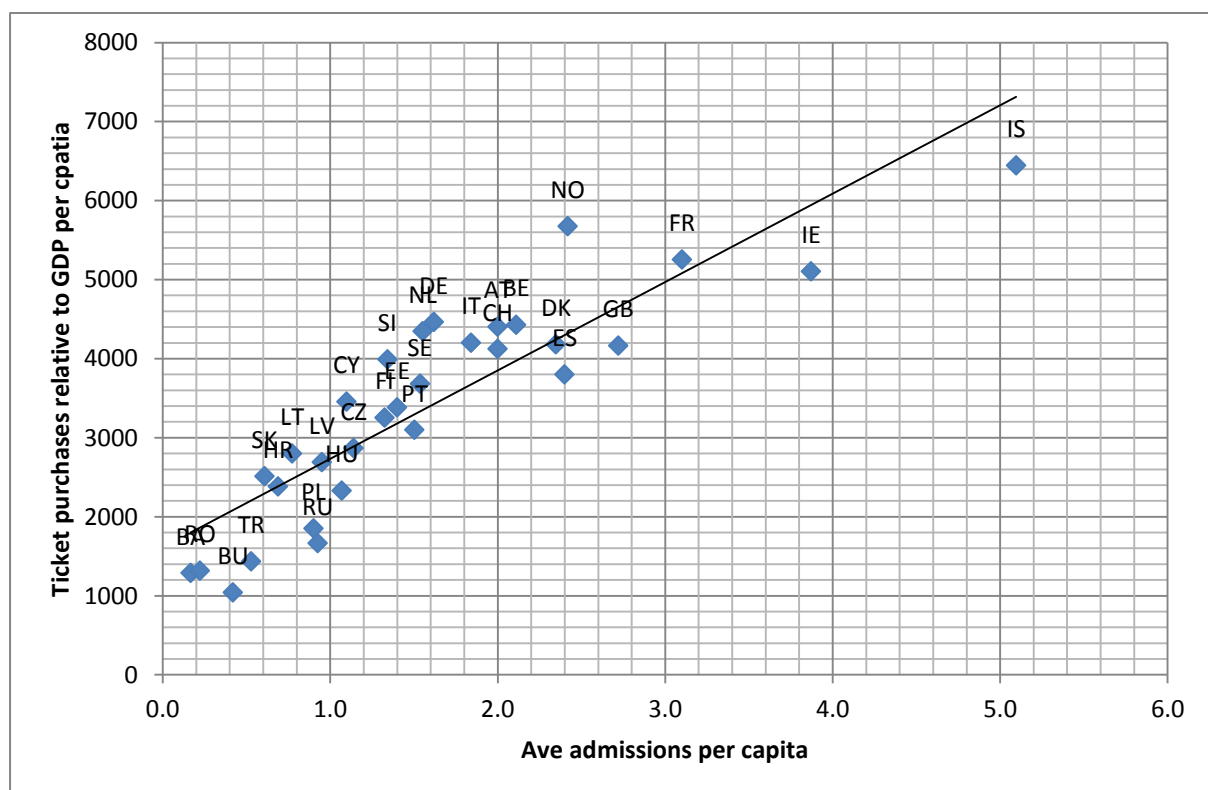


The variation across Europe in per capita cinema admissions may partly be explained by national income. People in poor countries like Romania, Bulgaria and Turkey probably cannot afford to go to the cinema as regularly as those in rich countries. Romania and Bulgaria also have few cinema screens (0.8 and 1.6 screens per 100,000 people respectively). According to a recent EU report (2014: 5), 37% of Romanians have no cinema within 30 minutes of their home.

Yet even some wealthy countries have relatively low admissions in comparison to their GDP. Sweden’s average GDP, for example, is \$48,306 per capita, yet it only averages 1.5 admissions per head of population. By comparison, Ireland, which has a similar GDP per capita of \$48,702, averages 3.9 admissions per head of population – more than twice that of Sweden.

This discrepancy can perhaps be explained by reference to the relative cost of cinema tickets within different countries. There is a strong correlation ($p=0.882$) between average ticket sales per head of population and the price paid for tickets as a proportion of a country’s per capita GDP. Countries like France, Ireland and Iceland, where ticket prices are relatively cheap in relation to per capita GDP, tend to have higher average admissions than countries like Sweden, Switzerland and Denmark, where ticket prices are relatively more expensive.

Figure 3: Ticket purchases (relative to GDP per capita) compared to cinema admissions, 2005-2012. (Source: OBS)



Market share within EU cinemas

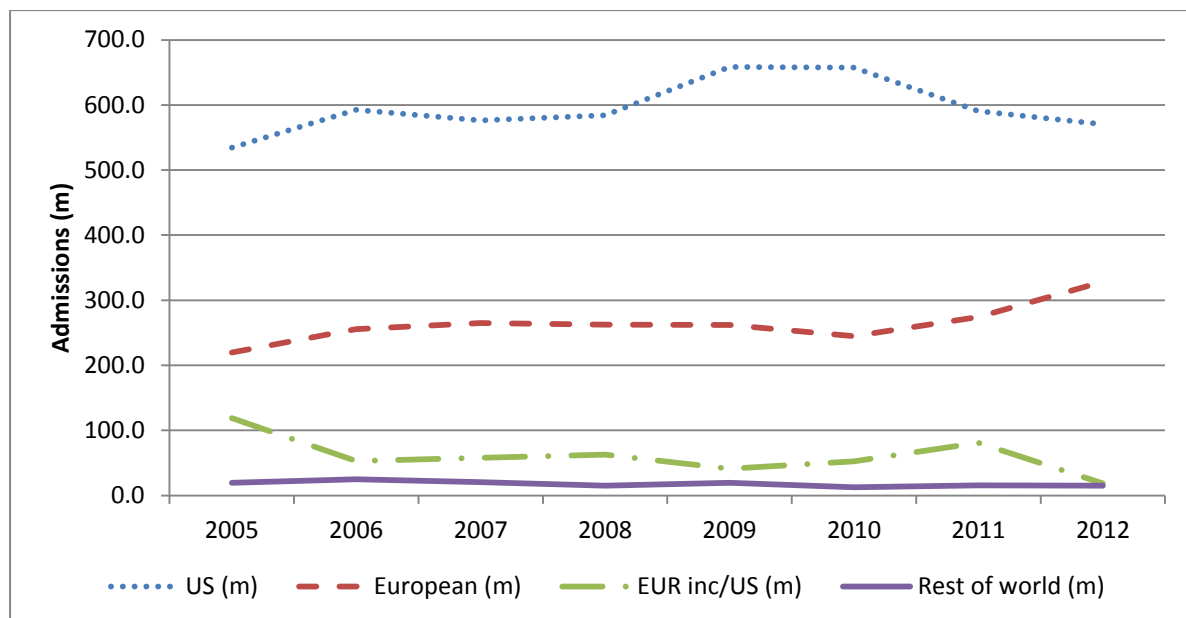
Having examined some of the general trends in European cinema admissions, let us explore in more detail the types of films watched. Between 2005 and 2012, 64% of total EU cinema admissions were for US films, 35% for European films (including 7% made with US inward investment), and 2% came from the rest of the world.

Admissions for European films increased by only 9m (3%) to reach 347m in 2012. Yet this masked a more dramatic change in the balance between purely European films and those made with US inward investment. Admissions for purely European films grew by 50% during the period to reach 329m. At the same time, admissions for European films made with US investment declined by 100m to reach a low-point of 18.7m in 2012 – an 84% fall. The proportion of European films made with US investment has declined from 13% of total EU cinema admissions in 2005, to only 2% in 2012.

Admissions for European films made with US investment were buoyed during the period by the success of the Harry Potter and James Bond franchises. The last five Harry Potter films alone accounted for 185m admissions in the EU since 2005 – 38% of all admissions for European films made with US investment. The recent decline in admissions for these types of film is largely due to the fact that the Harry Potter franchise concluded with the *Deathly Hallows: Part 2* in 2011.

Meanwhile, ticket sales for US films grew by 7% to reach 570m, yet as a proportion of total EU cinema admissions, this represents only a 1% increase. Admissions for films from the rest of the world fell by 5m (a 24% drop), though again, this was only a 1% change in proportional terms.

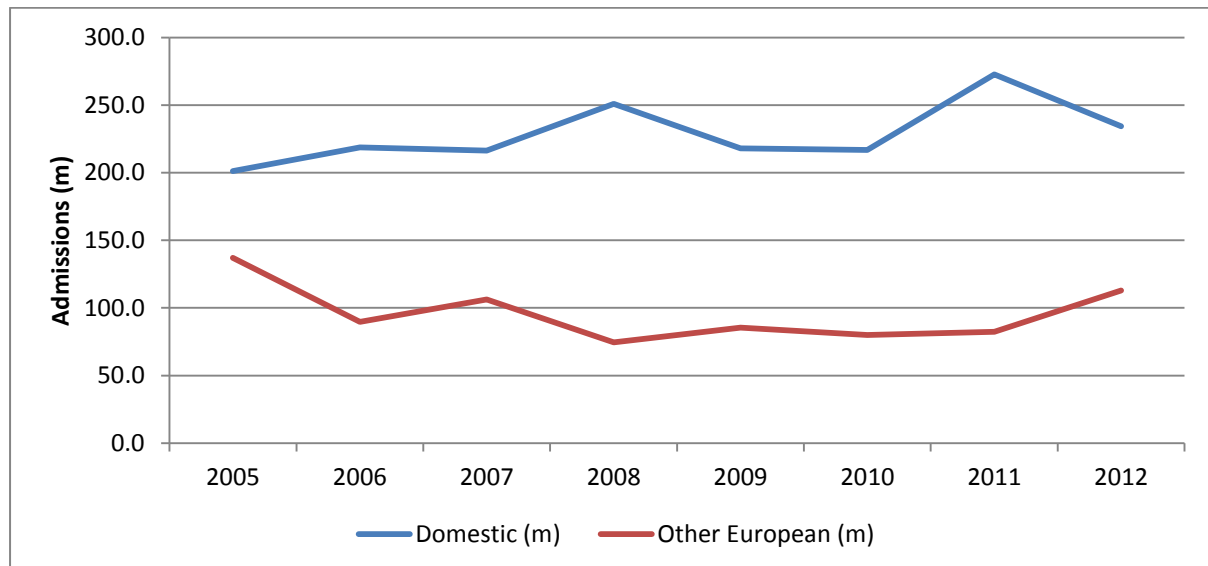
Figure 4: Cinema admissions in the EU, 2005-12. (Source: OBS)



While cinema admissions for European films (including those made with US investment) between 2005 and 2012 averaged 325m per year (35% of total EU admissions), a large proportion of ticket sales were for domestically produced films (e.g. French films watched in French cinemas). On average, 229m admissions (25% of total EU admissions) were for domestic films, compared with 96m (10%) for films made in other European countries.³ This figure accords with the findings of a recent EU report (2014) on audiences, which found that, from a cross-section of 104 recent cinema releases, European films were typically seen by 10-15% of film viewers.

Admissions for domestic films increased by 17% from 201m in 2005 to 228m in 2012. During the same period, average ticket sales for films from other European countries declined 137m to 113m – an 18% drop. Whereas in 2005, non-domestic European films represented about 16% of total EU admissions, by 2012 they accounted for only 12%. Admissions for non-domestic European films slid to a low-point of 75m (8% of total EU admissions) in 2008, but started to recover after 2011.

Figure 5: Admissions for domestic and non-domestic European films, 2005-12. (Source: OBS)



³ This figure may be an overestimation, since there are no admissions figures for domestic films in a many of the smaller European producing countries (e.g. Greece, Cyprus and the CEE countries) for the years 2005-2007, in which case it has been assumed that 100% of the admissions were for non-domestic films. Average admission for non-domestic European films for the period 2008-2012 is 9%.

Admissions for non-domestic European films

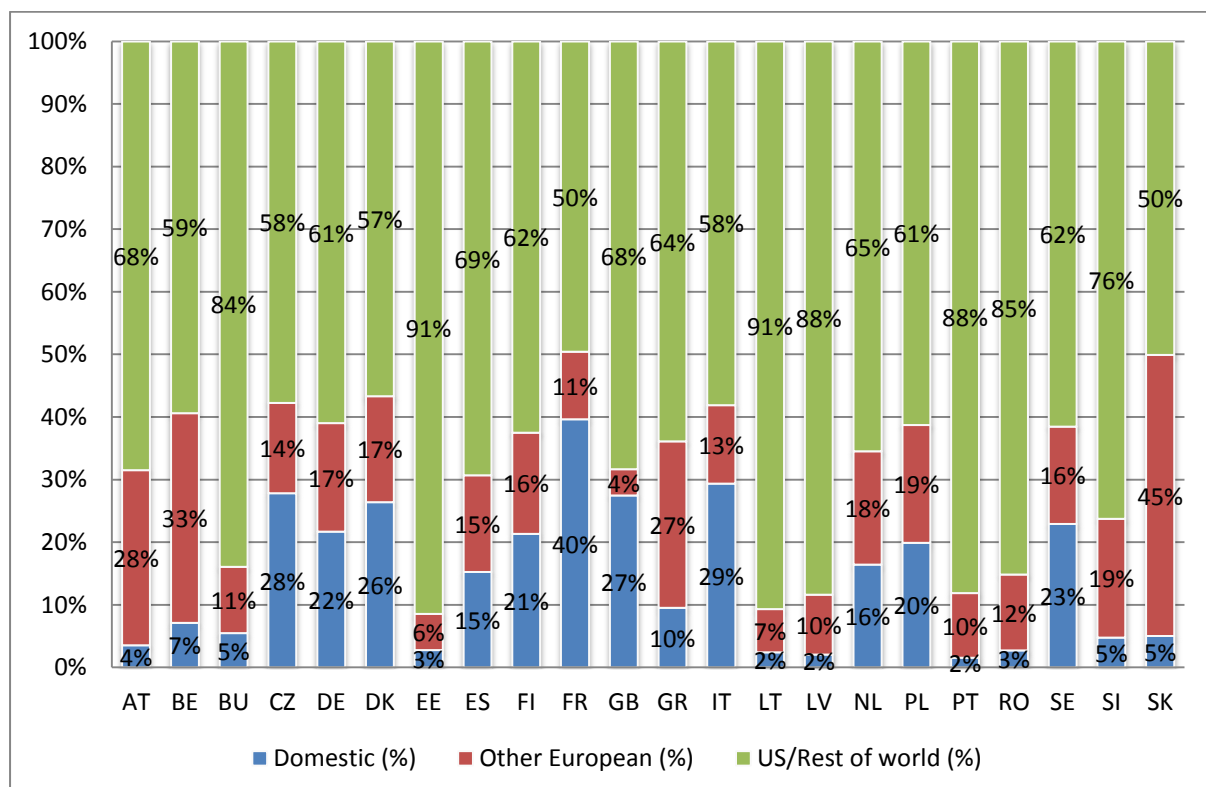
Although the OBS world market reports provide data on admissions for domestic and non-domestic films within EU member states, they rarely record how many of the non-domestic films consumed within a particular country relate to other European countries. Nevertheless, by combining data from the LUMIERE database with figures from the OBS reports, it is possible to estimate the ratio of domestic to non-domestic European films within different EU member states.⁴

Over the period 2005-12, France had the highest proportion of admissions for domestic films (40%), followed by Italy (29%) and the Czech Republic (28%). The Baltic states – Lithuania (2%), Latvia (2%) and Estonia (3%) – all consumed a very low proportion of domestic films, as did Portugal (2%), Romania (3%) and Austria (4%).

Slovakia had the highest proportion of admissions for non-domestic European films (45%), followed by Belgium (33%) and Austria (28%). The high consumption of films from other European countries can perhaps be explained by the fact these small nations all share a common language with a larger producing neighbour.

Britain had the lowest proportion of admissions for non-domestic European films (4%), followed by Estonia (6%) and Lithuania (7%). In the latter two cases there was a very high proportion of admissions for films from the US and the rest of the world.

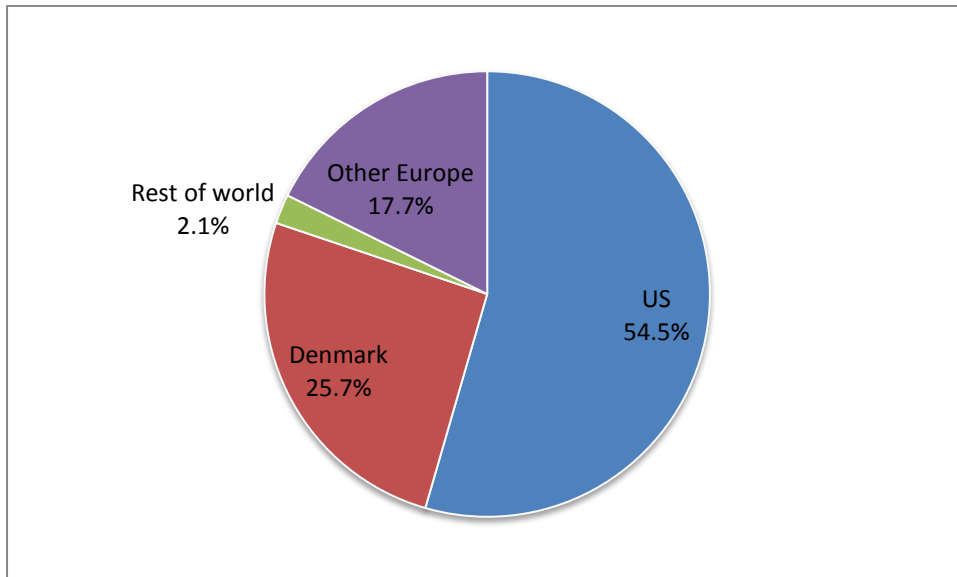
Figure 6: Estimated market share, 2005-12. (Source: LUMIERE/OBS)



⁴ This is done by calculating the ratio of admissions for domestic films to non-domestic Europe films within the sample of 4,070 films produced using the LUMIERE database and applying this ratio to the figures for domestic film admissions taken from the OBS world market reports.

A more accurate picture of admissions for domestic and non-domestic European films can be obtained in the case of Denmark using data from the Danish Film Institute (which provides figures on the admissions for all films screened in Danish cinemas between 1976 and 2011). This data reveals that, of the 88m admissions to Danish cinemas recorded between 2005 and 2011, 55% were for US films, 26% were for Danish films, 18% were for other European films, and 2% came from the rest of the world. (NB. these figures almost exactly mirror the estimates for Denmark calculated above.)

Figure 7: Market share in Danish cinemas, 2005-11. (Source: Danish Film Institute)



Top 20 films by admissions in the EU

The most popular film within the EU market during the period 2005-12 was *Skyfall*, followed by *Harry Potter and the Goblet of Fire* and the French comedy-drama *Intouchables*. The James Bond and Harry Potter franchises dominate the top 10 films.

14 of the top 20 were British films (all but one of which were made with US investment), 5 were French films and 1 was a German film. Films made with US inward investment dominate the top 20.

The majority of films in the top 20 are big budget fantasy, action or adventure films. Comedies are the next most popular genre. *The King's Speech* is the only biopic, and *Perfume* the only crime film.

The average budget is \$109m, and the average number of admissions is 24m. Only *Bienvenue chez les Ch'tis* (Welcome to the Sticks), *The King's Speech* and *Slumdog Millionaire* have a budget of \$15m or less. The top 20 EU films represent 6% of total EU cinema admissions between 2005 and 2012.

Table 1: Top 20 films in the EU by admissions, 2005-12. (Source: LUMIERE)

Film	Producing countries	Year	Budget	Genre ⁵	Admissions
<i>Skyfall</i> (EN)	GB / US	2012	\$200m	Action	44,464,388
<i>Harry Potter and the Goblet of Fire</i> (EN)	GB INC / US	2005	\$150m	Fantasy	42,290,635
<i>Intouchables</i> (FR)	FR	2011	\$103m	Biography	39,775,583
<i>Harry Potter and the Deathly Hallows: Part 2</i> (EN)	GB INC / US	2011	\$125m	Fantasy	37,874,896
<i>Harry Potter and the Order of the Phoenix</i> (EN)	GB INC / US	2007	\$150m	Fantasy	36,874,874
<i>Harry Potter and the Half-Blood Prince</i> (EN)	GB INC / US	2008	\$250m	Fantasy	33,875,035
<i>Harry Potter and the Deathly Hallows: Part 1</i> (EN)	GB INC / US	2010	£150m	Fantasy	33,850,454
<i>Casino Royale</i> (EN)	GB INC / US / DE / CZ	2006	\$150m	Action	27,782,571
<i>Quantum of Solace</i> (EN)	GB INC / US	2008	\$200m	Action	26,076,721
<i>Bienvenue chez les Ch'tis</i> (FR)	FR	2008	\$15m	Comedy	25,511,247
<i>The King's Speech</i> (EN)	GB INC / US	2010	\$15m	Biopic	19,989,044
<i>Slumdog Millionaire</i> (EN)	GB	2008	\$15m	Drama	16,667,974
<i>Mr. Bean's Holiday</i> (EN)	GB / FR / DE / US	2007	\$25m	Comedy	14,727,660
<i>Astérix aux jeux olympiques</i> (FR)	FR / DE / ES / IT	2008	\$115m	Adventure	13,502,542
<i>Wallace & Gromit in The Curse of the Were-Rabbit</i> (EN)	GB INC / US	2005	\$25m	Animation	13,430,121
<i>Robin Hood</i> (EN)	GB INC / US	2010	\$200m	Adventure	13,109,969
<i>Sur la piste du Marsupilami</i> (FR)	FR / BE	2012	\$53m	Adventure	11,430,990
<i>Kingdom of Heaven</i> (EN)	GB INC / DE / ES / US	2005	\$130m	Action	11,142,440
<i>Perfume: The Story of a Murderer</i> (EN)	DE / ES / FR	2006	\$65m	Crime	11,047,765
<i>Les Bronzés 3: amis pour la vie</i> (FR)	FR	2006	\$42m	Comedy	10,797,463

⁵ Genre and budget are taken from IMDb.

If we exclude domestic admissions from the results, then the most popular film within the EU market was *Harry Potter and the Goblet of Fire*, followed by *Skyfall* and the *Order of the Pheonix*. The James Bond and Harry Potter films continue to dominate the top 10, but the French film *Intouchables* slips from 3rd to 7th, while the German film *Perfume* slips from 19th to 24th. This suggests that both these films were far more popular in their domestic market than they were in other European countries.

The British drama *Match Point*, the Swedish crime thriller *Män som hatar kvinnor* (Girl with the Dragon Tattoo), and the English-language French action film *Taken 2* enter the top 20 due to strong performances outside their own domestic markets.

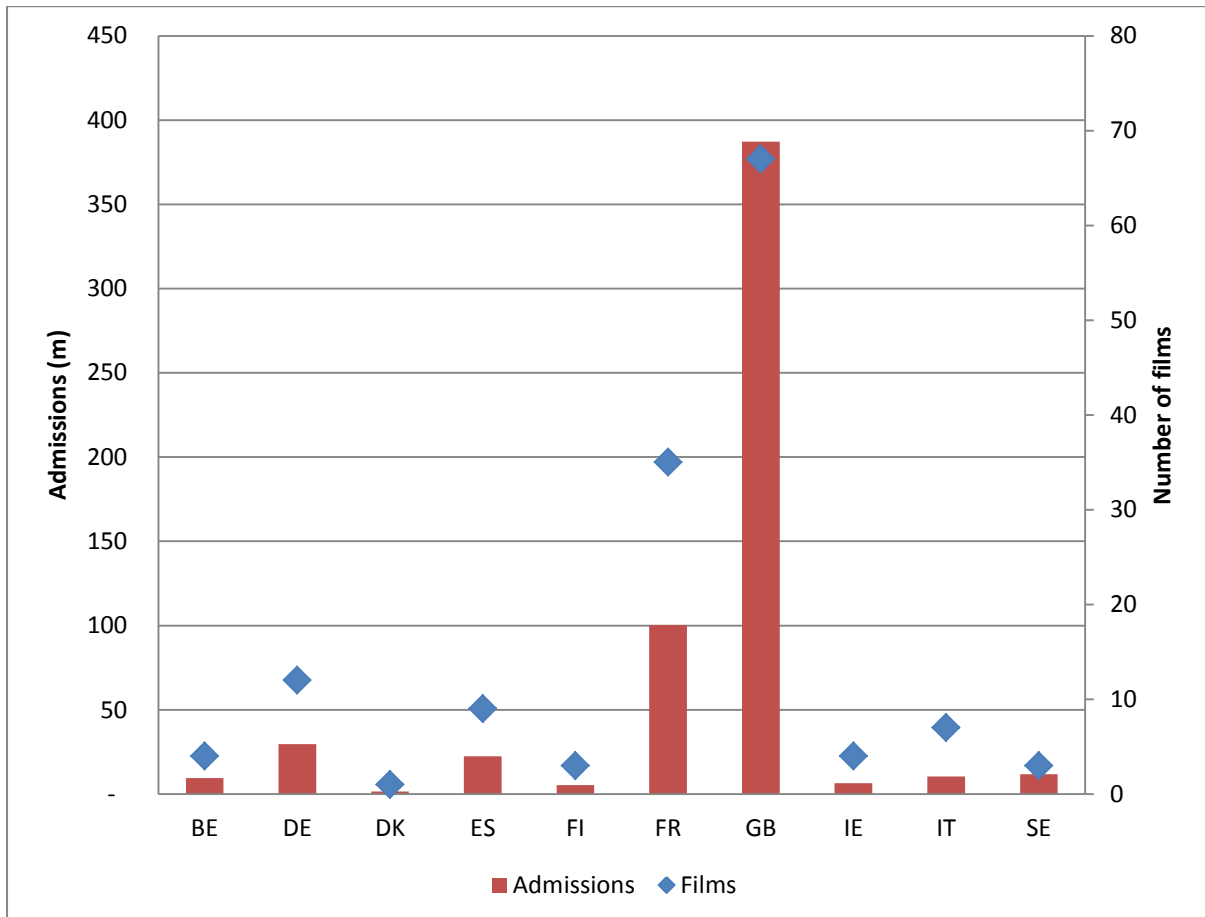
The average budget falls only slightly from \$109m to \$106m, while average admissions fall more substantially from 24m to 15m. With domestic admissions excluded, the threshold for entering the top 20 reduces from 11m to 6m admissions. The top 20 EU films (excluding domestic ticket sales) represent 4% of total EU cinema admissions between 2005 and 2012.

Table 2: Top 20 films in the EU by admissions (excluding domestic ticket sales), 2005-12. (Source: LUMIERE)

Film	Producing countries	Year	Budget	Genre	Admissions
Harry Potter and the Goblet of Fire (EN)	GB INC / US	2005	\$150m	Fantasy	31,884,730
Skyfall (EN)	GB / US	2012	\$200m	Action	28,518,942
Harry Potter and the Order of the Phoenix (EN)	GB INC / US	2007	\$125m	Fantasy	27,086,116
Harry Potter and the Deathly Hallows: Part 2 (EN)	GB INC / US	2011	\$150m	Fantasy	25,813,149
Harry Potter and the Deathly Hallows: Part 1 (EN)	GB INC / US	2010	\$150m	Fantasy	24,886,515
Harry Potter and the Half-Blood Prince (EN)	GB INC / US	2008	\$150m	Fantasy	24,550,861
Intouchables (FR)	FR	2011	\$103m	Biography	18,360,954
Casino Royale (EN)	GB INC / US / DE / CZ	2006	\$150m	Action	17,359,431
Quantum of Solace (EN)	GB INC / US	2008	\$200m	Action	16,193,159
The King's Speech (EN)	GB INC / US	2010	\$15m	Biopic	12,450,630
Slumdog Millionaire (EN)	GB	2008	\$15m	Drama	10,847,322
Robin Hood (EN)	GB INC / US	2010	\$200m	Action	10,465,816
Mr. Bean's Holiday (EN)	GB / FR / DE / US	2007	\$25m	Comedy	10,349,634
Kingdom of Heaven (EN)	GB INC / DE / ES / US	2005	\$130m	Action	9,482,596
Taken 2 (EN)	FR	2012	\$45m	Action	7,536,054
Astérix aux jeux olympiques (FR)	FR / DE / ES / IT	2008	\$115m	Adventure	6,690,164
Män som hatar kvinnor (SV)	SE / DK / DE	2009	\$13m	Crime	6,676,805
Match Point (EN)	GB INC / US / LU	2005	\$15m	Drama	6,621,230
Wallace & Gromit in The Curse of the Were-Rabbit (EN)	GB INC / US	2005	\$25m	Animation	6,591,178
Flushed Away (EN)	GB INC / US	2006	\$149m	Animation	6,360,215

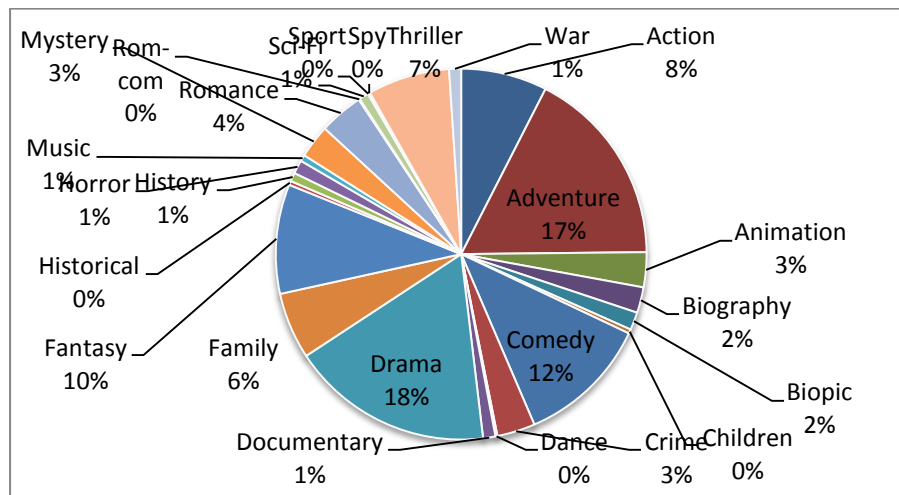
The appendix provides a complete list of European films which have successfully travelled to other European countries. This list has been calculated by identifying those films which have achieved over 1m total admissions in the EU outside their domestic market. Of the total 145 films identified, 67 are British, 35 French, 12 Germany and 9 Spanish. Belgium has only 4 films in this list (*Fly Me to the Moon*, *Irina Palm* and *Sammy's avonturen 1 and 2*) and Denmark only one (*Melancholia*). British films account for 387m (66%) admissions, French 100m (17%) and German 30m (5%).

Figure 8: Country origin of films which have achieved over 1m admissions in EU outside domestic market. (Source: LUMIERE)



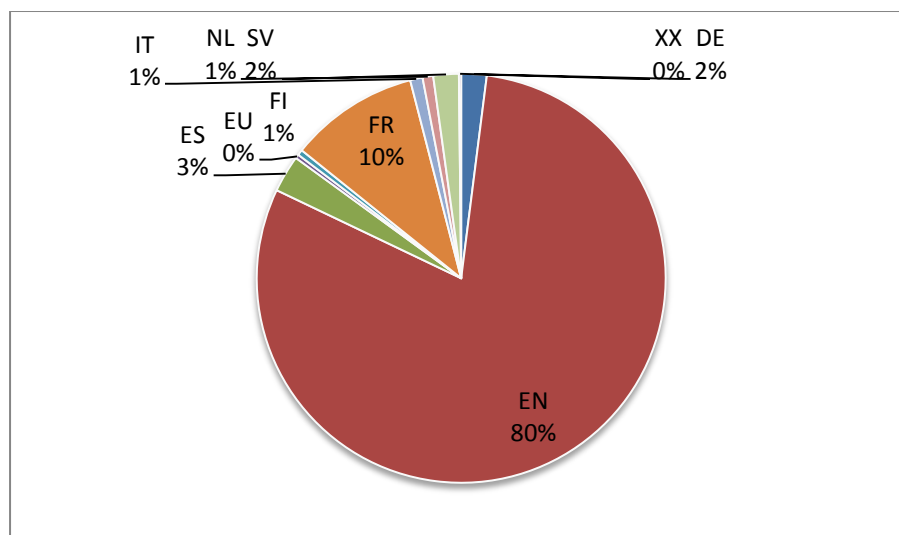
In terms of genre, dramas (17% of admissions) were most successful in travelling to other European markets, followed by adventure films (17%), comedy (12%) and fantasy (10%).⁶ The genres which travelled least well to other European markets were sport, spy, rom-com, children and dance.

Figure 9: Genre of films which have achieved over 1m admissions in EU outside domestic market. (Source: LUMIERE/IMDb)



In terms of language, the vast majority of the films which travelled successfully to other European markets were made in English (80%). French language films account for 10%, Spanish 2% and German 2%. Other languages (Finnish, Italian, Dutch, Swedish and mixed) account for the remaining 6%. The popularity of English language films reflects the dominance of English as a world language (though these figures do not take into account if the film was dubbed into another language when screened).

Figure 10: Original language of films which have achieved over 1m admissions in EU outside domestic market. (Source: LUMIERE)



⁶ IMDb was used to determine the genre of the 145 films in the list. IMDb offers up to three genre codes per film. These were weighted so that if only one genre code was used it weighted 100%, if two genre codes were used they weighted 50% each, and if all three codes were used they weighted 33.3% each. It must be remembered that genre coding is largely subjective and the results presented here are only indicative.

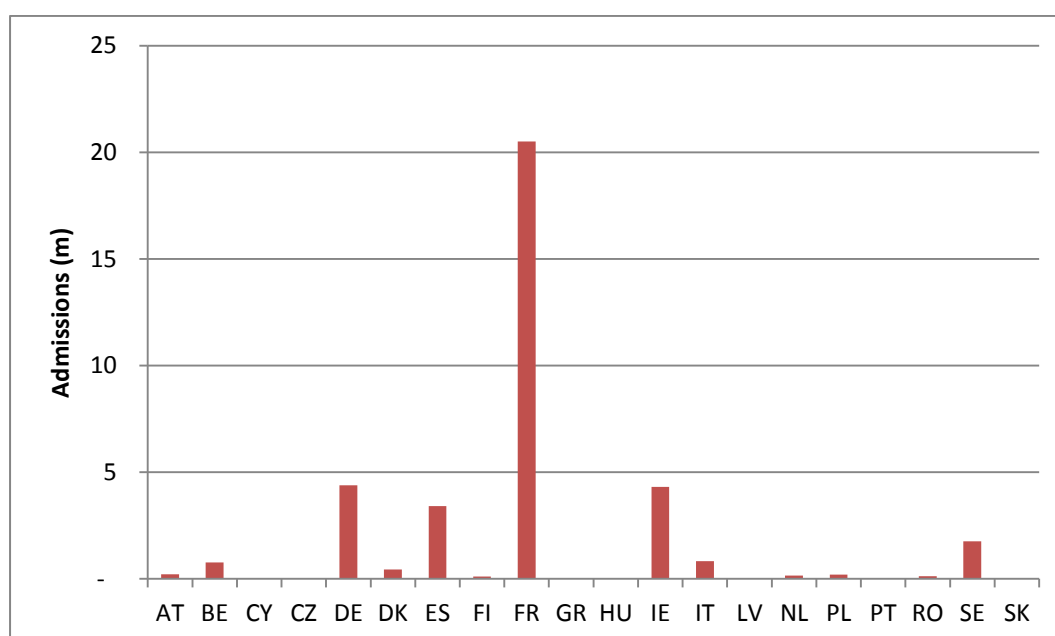
Non-domestic European films in British cinemas

Finally, let us examine the impact of non-domestic European films within three particular countries: Britain, Belgium and Denmark. As well as being our case-study countries, these also nicely illustrate three typical kinds of European market: the large nation (UK), the small nation which shares a common language with a larger producing country (Belgium), and the small nation which does not share a common language with a larger producing country (Denmark).⁷

There were approximately 512 films from the other EU countries released in British cinemas during the period 2005-12. These totalled 37m admissions.

France was responsible for the highest number of non-domestic European films (223), followed by Ireland (60) and Germany (55). France also accounted for the highest amount of admissions (20m), followed by Germany (4.4m) and Ireland (4.3m).

Figure 11: Country origin of non-domestic European films in British cinemas, 2005-12. (Source: LUMIERE)



Taken 2 was the most popular foreign European film in the British cinema, followed by *The Artist* and *The Magic Roundabout*. Many of the films within the top 20 were English language films, despite often being produced in non-English speaking countries. 11 of the top 20 are French films, 3 Irish, 3 German, 2 Spanish and 1 Swedish.

Table 3: Top 20 non-domestic European films in British cinemas, 2005-12. (Source: LUMIERE)

Film	English title	Producing countries	Year	Admissions	Rank ⁸
Taken 2 (EN)		FR	2012	3,692,417	15
The Artist (EN)		FR / BE	2011	1,542,798	37
The Magic Roundabout (EN)		FR / GB	2005	1,273,412	45
Taken (EN)		FR / US / GB	2008	1,232,830	46
Arthur et les Minimoys (FR)	Arthur and the Invisibles	FR	2006	1,09,0792	51

⁷ It is understood that Danish people can often understand other Scandinavian languages (e.g. Swedish, Norwegian, Finnish). However, Denmark's Scandinavian neighbours are not large producing countries.

⁸ Rank refers to how the film ranks in relation to all the European films shown within that country.

Män som hatar kvinnor (SV)	Girl with the Dragon Tattoo	SE / DK / DE	2009	1,06,4438	52
Planet 51 (EN)		ES / GB	2009	916,506	63
Resident Evil: Afterlife (EN)		DE / FR / GB	2010	815,955	70
The Wind That Shakes the Barley (EN)		IE / GB / DE / ES / IT	2006	802,210	72
The Guard (EN)		IE	2011	761,411	74
Becoming Jane (EN)		IE INC / GB	2007	748,510	75
Hitman (EN)		FR / US	2007	726,674	77
The Ghost Writer (EN)		FR / DE / GB	2010	699,720	80
Volver (ES)		ES	2006	606,125	88
The Three Musketeers (EN)		DE / GB / FR	2011	573,764	91
Oliver Twist (EN)		FR / CZ / GB	2005	551,461	93
Un monstre à Paris (FR)	A Monster in Paris	FR	2011	534,717	95
Das Leben Der Anderen (DE)	The Lives of Others	DE	2006	534,610	96
Transporter 3 (EN)		FR / GB	2008	496,334	102
Coco avant Chanel (FR)		FR	2009	482,884	104

If we exclude English language films and children's animations (which are normally dubbed into English for British audiences) from the results, then the most popular foreign-language European film in the UK was *Män som hatar kvinnor* (The Girl with the Dragon Tattoo), followed by *Volver* and the *Das Leben Der Anderen* (The Lives of Others). All of the films in the foreign language European top 20 might be defined as 'serious' dramas.

Table 4: Top 20 non-domestic European films (excluding animations and English language) in British cinemas, 2005-12.
(Source: LUMIERE)

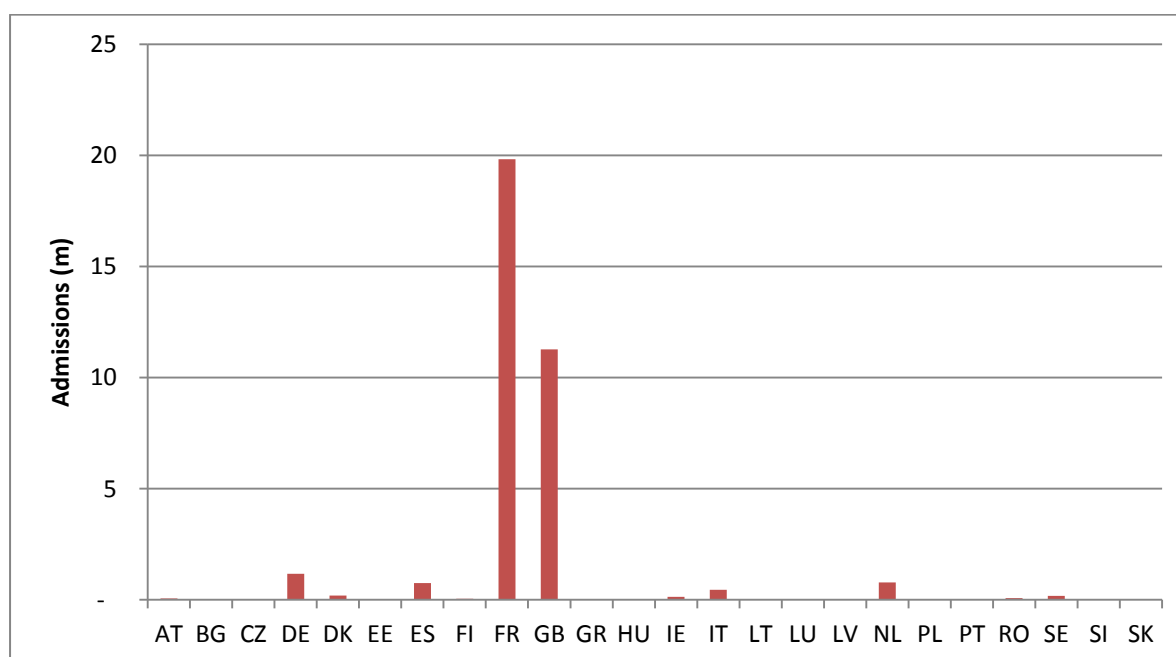
Film	English title	Producing countries	Year	Admissions	Rank
Män som hatar kvinnor (SV)	Girl with the Dragon Tattoo	SE / DK / DE	2009	1,064,438	52
Volver (ES)		ES	2006	606,125	88
Das Leben Der Anderen (DE)	The Lives of Others	DE	2006	534,610	96
Coco avant Chanel (FR)	Coco Before Chanel	FR	2009	482,884	104
El Laberinto del Fauno (ES)	Pan's Labyrinth	ES / MX	2006	384,608	123
El Orfanato (ES)	The Orphanage	ES	2007	341,453	130
La Môme (FR)		FR / CZ / GB	2007	335,568	131
Intouchables (FR)		FR	2011	316,686	136
Caché (FR)	Hidden	FR / AT / DE / IT	2005	297,358	144
Flickan som lekte med elden (SV)	Girl Who Played with Fire	SE / DK / DE	2009	279,038	151
Los abrazos rotos (ES)	Broken Embraces	ES	2009	249,036	157
La piel que habito (ES)	The Skin I Live In	ES	2011	248,487	158
Il y a longtemps que je t'aime (FR)	I've Loved You So Long	FR / DE	2008	236,025	164
Ne le dis à personne (FR)	Tell No One	FR	2006	235,720	165
Låt den rätte komma in (SV)	Let the Right One In	SE	2008	205,252	175
Le Scaphandre et le papillon (FR)	Driving Bell & the Butterfly	FR	2007	194,241	180
Gomorra (IT)		IT	2008	182,029	185
Persepolis (FR)		FR	2007	174,257	193
Entre les murs (FR)	The Class	FR	2008	163,294	200
Io sono l'amore (IT)	I am Love	IT	2009	158,674	205

Non-domestic European films in Belgium cinemas

There were approximately 1,093 films from other EU countries released in Belgium cinemas between 2005 and 2012 (about twice the amount released in Britain). These accounted for 35m admissions in total.

France was responsible for the highest number of non-domestic European films released in Belgium (629), followed by Britain (156) and Germany (63). French films also accounted for the highest amount of admissions (20m), again followed by Britain (11m) and Germany (1m). With the exception of Spain, Ireland and the Netherlands, admissions from other European countries were negligible.

Figure 12: Admissions for non-domestic European films in Belgium cinemas, 2005-12. (Source: LUMIERE)



Harry Potter and the Goblet of Fire was the most popular non-domestic European film in the Belgium cinema, followed by *Skyfall* and *Bienvenue chez les Ch'tis* (Welcome to the Sticks). *Quantum of Solace* and two of the *Harry Potter* films (*Half-Blood Prince* and *Order of the Pheonix*) are noticeable in their absence from the chart. 11 of the top 20 are British and 9 are French.

Table 5: Top 20 non-domestic European films in Belgium cinemas, 2005-12. (Source: LUMIERE)

Film	English title	Producing countries	Year	Admissions	Rank
Harry Potter and the Goblet of Fire (EN)		GB INC / US	2005	1,106,322	1
Skyfall (EN)		GB / US	2012	1,081,429	2
Bienvenue chez les Ch'tis (FR)		FR	2008	1,073,809	3
Harry Potter and the Deathly Hallows: Part 2 (EN)		GB INC / US	2011	997,136	4
Harry Potter and the Deathly Hallows: Part 1 (EN)		GB INC / US	2010	912,149	6
Rien à déclarer (FR)	Nothing to Declare	FR / BE	2010	900,467	7
Astérix aux jeux olympiques (FR)	Asterix at the Olympics	FR / DE / ES / IT	2008	576,572	8
Les Bronzés 3: amis pour la vie (FR)		FR	2006	559,766	9
Casino Royale (EN)		GB INC / US / DE / CZ	2006	540,444	10
Sur la piste du Marsupilami (FR)	Trail of the Marsupilami	FR / BE	2012	509,136	11
Slumdog Millionaire (EN)		GB	2008	398,376	13
Kingdom of Heaven (EN)		GB INC / DE / ES / US	2005	346,521	16
Robin Hood (EN)		GB INC / US	2010	339,501	17
Arthur et les Minimoys (FR)	Arthur and the Invisibles	FR	2006	308,977	18
Astérix et Obélix : Au Service de Sa Majesté (FR)	God Save Britannia	FR / ES / IT / LT	2012	302,527	19

Nanny McPhee (EN)	GB / US / FR	2005	299,176	20
Taken 2 (EN)	FR	2012	275,716	22
Taxi 4 (FR)	FR	2007	274,737	23
The King's Speech (EN)	GB INC / US	2010	266,494	25
Wallace & Gromit...Were-Rabbit (EN)	GB INC / US	2005	251,613	26

If we exclude films made with US investment⁹ from the chart (e.g. the Harry Potter films), the top 20 becomes dominated by French films. 15 of the top 20 are French, 5 British, 2 German and 1 Dutch. French films seem to travel far more easily to French-speaking Wallonia than Dutch films in Dutch-speaking Flanders. This is perhaps because France is a far bigger film producer than the Netherlands.

Table 6: Top 20 non-domestic European films (excluding US inward investment) in Belgium cinemas, 2005-12. (Source: LUMIERE)

Film	English title	Producing countries	Year	Admissions	Rank
Skyfall (EN)		GB / US	2012	1,081,429	2
Bienvenue chez les Ch'tis (FR)	Welcome to the Sticks	FR	2008	1,073,809	3
Rien à déclarer (FR)		FR / BE	2010	900,467	7
Astérix aux jeux olympiques (FR)	Asterix at the Olympics	FR / DE / ES / IT	2008	576,572	8
Les Bronzés 3: amis pour la vie (FR)		FR	2006	559,766	9
Sur la piste du Marsupilami (FR)	Trail of the Marsupilami	FR / BE	2012	509,136	11
Slumdog Millionaire (EN)		GB	2008	398,376	13
Arthur et les Minimoys (FR)	Arthur and the Invisibles	FR	2006	308,977	18
Astérix et Obélix : Au Service de Sa Majesté (FR)	God Save Britannia	FR / ES / IT / LT	2012	302,527	19
Nanny McPhee (EN)		GB / US / FR	2005	299,176	20
Taken 2 (EN)		FR	2012	275,716	22
Taxi 4 (FR)		FR	2007	274,737	23
Johnny English Reborn (EN)		GB / FR / US	2011	220,948	31
Perfume: The Story of a Murderer (EN)		DE / ES / FR	2006	220,057	32
Le petit Nicolas (FR)	Little Nicholas	FR / BE	2009	214,250	33
Arthur et la vengeance de Maltazard (EN)	Arthur...Great Adventure	FR	2009	209,187	34
Nanny McPhee and the Big Bang (EN)		GB / US / FR	2010	202,750	36
Le prénom (FR)		FR	2012	180,627	43
La Môme (FR)	What's in a Name	FR / CZ / GB	2007	175,902	45
United 93 (EN)		GB / FR / US	2006	174,524	46

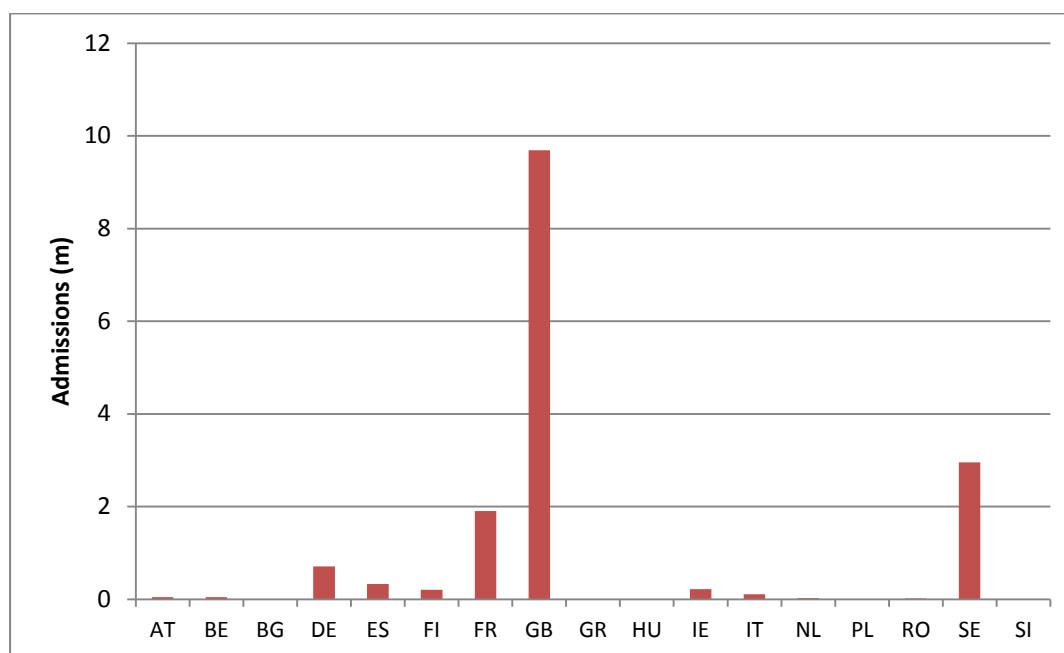
⁹ Films made with US inward investment are identified by the marker 'INC / US' – e.g. GB INC / US.

Non-domestic European films in Danish cinemas

There were approximately 418 films from other EU countries released in Danish cinemas between 2005 and 2012. These accounted for about 16m admissions in total.¹⁰

Britain was responsible for the highest number of non-domestic European films (135), followed by France (120), Germany (37) and Sweden (37). Britain also accounted for the highest amount of admissions (10m). Swedish films (3m) had higher admissions than French films (2m) despite the fact that France released more than three times the amount of films.

Figure 13: Admissions for non-domestic European films in Danish cinemas by country, 2005-12. (Source: LUMIERE)



Man s m hatar kvinnor (The Girl with the Dragon Tattoo) was the most popular non-domestic European film in the Danish cinema, followed by *Skyfall* and *Casino Royale*. 15 of the top 20 are British films, 3 Swedish, 1 French and 1 German.

Table 7: Top 20 non-domestic European films in Danish cinemas, 2005-12. (Source: LUMIERE)

Film	English title	Producing countries	Year	Admissions	Rank
<i>M�n som hatar kvinnor (SV)</i>	Girl with Dragon Tattoo	SE / DK / DE	2009	959,369	1
<i>Skyfall (EN)</i>		GB / US	2012	891,235	2
<i>Casino Royale (EN)</i>		GB INC / US / DE / CZ	2006	879,561	3
<i>Flickan som lekte med elden (SV)</i>	Girl Played with Fire	SE / DK / DE	2009	786,683	4
<i>Harry Potter and the Goblet of Fire (EN)</i>		GB INC / US	2005	682,439	6
<i>Harry Potter and the Deathly Hallows: Part 2 (EN)</i>		GB INC / US	2011	651,546	8
<i>Harry Potter and the Order of the Phoenix (EN)</i>		GB INC / US	2007	645,569	9
<i>Harry Potter and the Half-Blood Prince (EN)</i>		GB INC / US	2008	596,439	11
<i>Harry Potter and the Deathly Hallows: Part 1 (EN)</i>		GB INC / US	2010	521,860	14
<i>Luftslottet som spr�ngdes (SV)</i>	Girl Kicked Hornet's Nest	SE / DK / DE	2009	501,762	17
<i>Quantum of Solace (EN)</i>		GB INC / US	2008	480,056	18
<i>Intouchables (FR)</i>		FR	2011	319,200	38
<i>The King's Speech (EN)</i>		GB INC / US	2010	233,724	47
<i>Match Point (EN)</i>		GB INC / US / LU	2005	214,408	54
<i>Slumdog Millionaire (EN)</i>		GB	2008	212,095	55

¹⁰ The Danish Film Institute dataset puts the number of films from other EU countries released in Danish cinemas at 433 and admissions at 15m for the period 2005-11.

The Iron Lady (EN)		GB / FR	2011	204,550	58
An Education (EN)		GB INC / US	2009	199,810	60
Mr. Bean's Holiday (EN)		GB / FR / DE / US	2007	178,284	72
Das Leben Der Anderen (DE)	The Lives of Others	DE	2006	158,059	80
Eastern Promises (EN)		GB INC / US / CA	2007	152,512	82

A much more diverse set of films is achieved if we exclude films made with US investment. 6 of the top 20 are British, 6 Swedish, 5 French, 2 German and 1 Irish.

Table 8: Top 20 non-domestic European films (ex. US investment) in Danish cinemas, 2005-12. (Source: LUMIERE)

Film	English title	Producing countries	Year	Admissions	Rank
Män som hatar kvinnor (SV)	Girl with the Dragon Tattoo	SE / DK / DE	2009	959,369	1
Skyfall (EN)		GB / US	2012	891,235	2
Flickan som lekte med elden (SV)	Girl Who Played with Fire	SE / DK / DE	2009	786,683	4
Luftslottet som sprängdes (SV)	Girl Who Kicked Hornet's Nest	SE / DK / DE	2009	501,762	17
Intouchables (FR)		FR	2011	319,200	38
Slumdog Millionaire (EN)		GB	2008	212,095	55
The Iron Lady (EN)		GB / FR	2011	204,550	58
Mr. Bean's Holiday (EN)		GB / FR / DE / US	2007	178,284	72
Das Leben Der Anderen (DE)	The Lives Of Others	DE	2006	158,059	80
Elizabeth: The Golden Age (EN)		GB / FR / DE	2007	137,255	88
Arn: Tempelriddaren (SV)	Knights Templar	SE / GB	2007	134,634	89
Astérix et les Vikings (FR)	Asterix and the Vikings	FR / DK	2006	132,082	91
Pettson och Findus 3: Tomtemaskinen (SV)		SE / DK / GB / HU	2005	131,265	92
Coco avant Chanel (FR)	Coco Before Chanel	FR	2009	130,130	93
Becoming Jane (EN)		IE INC / GB	2007	127,885	95
Taken 2 (EN)		FR	2012	127,633	96
Nobels testamente (SV)		SE	2012	115,342	101
Arthur et les Minimoys (FR)	Arthur and the Invisibles	FR	2006	114,702	102
Brideshead Revisited (EN)		GB	2008	110,254	105
Der Baader Meinhof Komplex (DE)		DE / FR / CZ	2008	109,841	107

Conclusions

- EU citizens visit the cinema far less often than their US counterparts. The average EU citizen goes to the cinema about twice a year, compared with 4 times per year in the US.
- Cinema admissions in the EU vary from 5.1 per capita in Iceland to 0.2 per capita in Romania. These variations can perhaps be explained by the cost of cinema tickets in relation to GDP. Countries where ticket prices are relatively cheap as a proportion of GDP per capita tend to have higher admissions than countries where tickets are relatively more expensive.
- Most cinema-goers in the EU watch American films. In certain countries – typically larger nations or countries which do not share a common language with a larger neighbour – domestic films are also popular. However, films produced in other European countries represent only a small proportion (about 10% across the EU) of total EU cinema admissions.
- British cinema-goers are the least likely to watch films from other European countries (and those they do tend to be English language films).
- Slovaks are the most likely to watch films from other European countries.
- The most popular non-domestic European films are usually British (often made with US investment), followed by French and German – i.e. the larger producing nations.
- Dramas, adventures, comedies, fantasies and action films tend to travel successfully to other European countries. Spy films, sport, rom-coms, historical, dance and children's films travel less well (though deciding a film's genre is subject to bias).
- Films primarily made in smaller producing countries rarely travel to other European markets. A notable exception to this trend is Swedish films (e.g. the Millennium trilogy).
- So which European films travel successfully to other European markets? In most cases they are big-budget British (made with US inward investment) adventure-dramas – e.g. *Skyfall*.

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- LUMIERE: <http://lumiere.obs.coe.int/>

Appendix: European films with over 1m admissions in EU outside domestic market (2005-12).

Country / film	EU admissions (ex. Domestic)
BE	9,520,896
Fly Me to the Moon (EN)	1,677,009
Irina Palm (EN)	1,223,439
Sammy's avonturen 2 (EN)	1,731,234
Sammy's avonturen: De geheime doorgang (NL)	4,889,214
DE	29,703,243
Cloud Atlas (EN)	1,202,147
Das Leben Der Anderen (DE)	4,847,477
Das weiße Band (DE)	1,668,486
Die Konferenz der Tiere (DE)	2,623,633
Happily N'Ever After (EN)	1,388,078
Hexe Lilli: Der Drache und das magische Buch (DE)	1,003,188
Perfume: The Story of a Murderer (EN)	5,458,548
Resident Evil: Afterlife (EN)	4,321,268
Resident Evil: Retribution (EN)	1,600,209
The Three Musketeers (EN)	2,958,696
Tristan + Isolde (EN)	1,054,997
Wickie und die starken Männer (DE)	1,576,516
DK	1,424,368
Melancholia (EN)	1,424,368
ES	22,469,712
Agora (EN)	1,011,242
El Laberinto del Fauno (ES)	2,043,269
El Orfanato (ES)	1,533,302
Izarren argia (EU)	1,830,625
La piel que habito (ES)	2,026,005
Los abrazos rotos (ES)	2,706,153
Planet 51 (EN)	3,658,996
Rec (ES)	1,425,552
Volver (ES)	6,234,568
FI	5,400,402
Le Havre (FR)	1,462,499
Niko - lentäjän poika (FI)	2,547,419
Niko 2: Lentäjäväljekset (EN)	1,390,484
FR	100,267,986
2 Days in Paris (EN)	1,068,959
Arthur et la vengeance de Maltazard (EN)	1,583,440
Arthur et les Minimoys (FR)	4,337,399
Astérix aux jeux olympiques (FR)	6,690,164
Astérix et les Vikings (FR)	2,069,143
Astérix et Obélix : Au Service de Sa Majesté (FR)	1,964,913
Babylon A.D. (EN)	1,987,760
Bandidas (ES)	1,135,299
Bienvenue chez les Ch'tis (FR)	5,022,908
Caché (FR)	1,164,507
Carnage (EN)	2,674,810
Coco avant Chanel (FR)	2,558,219
Danny the Dog (EN)	1,492,727
Des hommes et des dieux (FR)	1,321,937
Ensemble, c'est tout (FR)	1,411,744
Entre les murs (FR)	1,421,666
From Paris with Love (EN)	1,245,664
Hitman (EN)	2,681,880
Intouchables (FR)	18,360,954
La Môme (FR)	2,474,382

L'arnacoeur (FR)	1,040,286
Le concert (FR)	1,673,105
Le petit Nicolas (FR)	1,484,066
Le Renard et l'enfant (FR)	1,249,496
Olé! (FR)	1,057,697
Oliver Twist (EN)	3,274,849
Potiche (FR)	1,235,662
Rien à déclarer (FR)	1,780,339
Taken (EN)	3,002,162
Taken 2 (EN)	7,536,054
The Artist (EN)	4,056,987
The Ghost Writer (EN)	3,531,859
The Magic Roundabout (EN)	1,673,254
Transporter 2 (EN)	2,037,392
Transporter 3 (EN)	2,966,303
GB	387,127,801
28 Weeks Later (EN)	1,412,700
A Dangerous Method (EN)	2,254,465
Another Year (EN)	1,103,276
Arthur Christmas (EN)	3,143,840
Atonement (EN)	2,804,008
Casino Royale (EN)	17,359,431
Doom (EN)	1,387,123
Dorian Gray (EN)	1,209,600
Earth (EN)	6,264,522
Eastern Promises (EN)	2,763,372
Easy Virtue (EN)	1,215,015
Elizabeth: The Golden Age (EN)	2,580,607
Flushed Away (EN)	6,360,215
Funeral Party (EN)	1,529,649
Green Zone (EN)	2,573,434
Hannibal Rising (EN)	3,450,961
Happy-Go-Lucky (EN)	1,203,783
Harry Potter and the Deathly Hallows: Part 1 (EN)	24,886,515
Harry Potter and the Deathly Hallows: Part 2 (EN)	25,813,149
Harry Potter and the Goblet of Fire (EN)	31,884,730
Harry Potter and the Half-Blood Prince (EN)	24,550,861
Harry Potter and the Order of the Phoenix (EN)	27,086,116
In Bruges (EN)	1,101,515
Johnny English Reborn (EN)	5,836,363
Keeping Mum (EN)	1,213,832
Kingdom of Heaven (EN)	9,482,596
Looking for Eric (EN)	1,031,086
Match Point (EN)	6,621,230
Mr. Bean's Holiday (EN)	10,349,634
Nanny McPhee (EN)	3,693,244
Nanny McPhee and the Big Bang (EN)	2,723,094
Notes on a Scandal (EN)	1,323,689
One Day (EN)	1,740,965
Pride and Prejudice (EN)	4,371,681
Quantum of Solace (EN)	16,193,159
Robin Hood (EN)	10,465,816
Scoop (EN)	3,217,347
Skyfall (EN)	28,518,942
Slumdog Millionaire (EN)	10,847,322
Solomon Kane (EN)	1,182,936
Stardust (EN)	3,067,026
StreetDance 2 (EN)	1,062,113

StreetDance 3D (EN)	2,019,945
Sunshine (EN)	1,414,174
Tamara Drewe (EN)	1,101,876
The Angels' Share (EN)	1,082,388
The Best Exotic Marigold Hotel (EN)	2,299,773
The Boat That Rocked (EN)	1,472,100
The Boy in the Striped Pyjamas (EN)	2,473,842
The Constant Gardener (EN)	3,586,188
The Descent (EN)	1,092,027
The Duchess (EN)	1,246,277
The Hitchhiker's Guide to the Galaxy (EN)	2,550,455
The Imaginarium of Doctor Parnassus (EN)	3,121,679
The Iron Lady (EN)	3,963,717
The King's Speech (EN)	12,450,630
The Last King of Scotland (EN)	1,482,991
The Last Legion (EN)	1,468,242
The Other Boleyn Girl (EN)	1,379,050
The Pirates! Band of Misfits (EN)	3,188,720
The Queen (EN)	3,645,637
The Woman in Black (EN)	1,503,290
Tinker Tailor Soldier Spy (EN)	2,487,744
United 93 (EN)	2,764,258
V for Vendetta (EN)	2,992,015
Valiant (EN)	2,868,643
Wallace & Gromit in The Curse of the Were-Rabbit (EN)	6,591,178
IE	6,410,278
Becoming Jane (EN)	1,376,585
Once (EN)	1,052,488
The Guard (EN)	1,257,368
The Wind That Shakes the Barley (EN)	2,723,837
IT	10,444,231
Gomorra (IT)	1,610,263
Habemus Papam (XX)	1,032,632
Karol, un Papa rimasto uomo (EN)	1,750,502
Karol, un uomo diventato Papa (IT)	1,881,776
La tigre e la neve (IT)	1,124,464
Pope John Paul II (EN)	1,913,155
Winx club - Il segreto del regno perduto (IT)	1,131,439
SE	11,784,514
Flickan som lekte med elden (SV)	3,183,022
Luftslottet som sprängdes (SV)	1,924,687
Män som hatar kvinnor (SV)	6,676,805
Grand Total	584,553,431