The circulation of EU non-national films

A sample study: Cinema, television and transactional video on-demand

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The circulation of EU non-national films

A sample study: Cinema, television and transactional video on-demand

Christian Grece

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1. Introduction

1.1. The circulation of EU non-national films

This report focuses on the “circulation of EU non-national films”. “Circulation” means, in this report, the export and import of films between Member States (MS) of the European Union (EU).

The objectives of the report are to:

- Quantify the export and import volume of EU films inside the EU.
- Identify the main export and import countries for EU non-national films.
- Establish export and import matrices showing the exchanges of EU non-national films between countries.
- Identify factors impacting the export and import of EU non-national films.
- Identify the existence (or not) of export/import patterns based on shared languages and/or ‘supposed’ cultural proximity.
- Measure the impact of co-productions on the export and import of EU non-national films.
- Establish a different measurement than uniquely volume for EU non-national exports.
- Identify clusters of countries for the import of EU non-national films.
- Research these questions for three distribution platforms: Cinema, television (TV) and transactional video on-demand (TVOD).

The report starts by providing background data on film production in the EU and explaining the methodology and limits of the datasets used.

For films in EU cinemas, the introduction to chapter 2 offers an overview of actual consumption of EU films in EU cinemas by looking at admissions figures (cinema is the only distribution platform for which actual consumption data is available) in order to allow a measurement of EU audiences’ propensity forEU non-national film consumption.

1.2. Background data: Average feature film production by EU country 2011-2015

Around 1 600 feature films produced in the EU each year.

France, the United Kingdom, Germany, Italy and Spain accounted for 65% of the production volume or 1 025 feature films per year.

Majority co-productions accounted on average for 22% of all feature films produced.

As national volume of feature film production has an impact on the export and import of EU films, it is important to first acquire an overview of feature film production in the EU.

National feature films are defined as fiction and feature documentaries, and 100% national and majority co-productions. Minor co-productions are not included. On average, 1 595.5 feature films were produced per year in 28 EU Member States (see Figure 1 and Map 1).

However, significant disparities in production volume were evident between countries (see Figure 2). EU-5 countries (the United Kingdom, France, Germany, Spain and Italy) accounted for 65% of all feature films produced in the EU(see Figure 2 and Map 2).

Ten countries- the Netherlands, Denmark, the Czech Republic, Sweden, Austria, Poland, Greece, Romania, Finland and Belgium - accounted for a quarter of average film production throughout the EU.

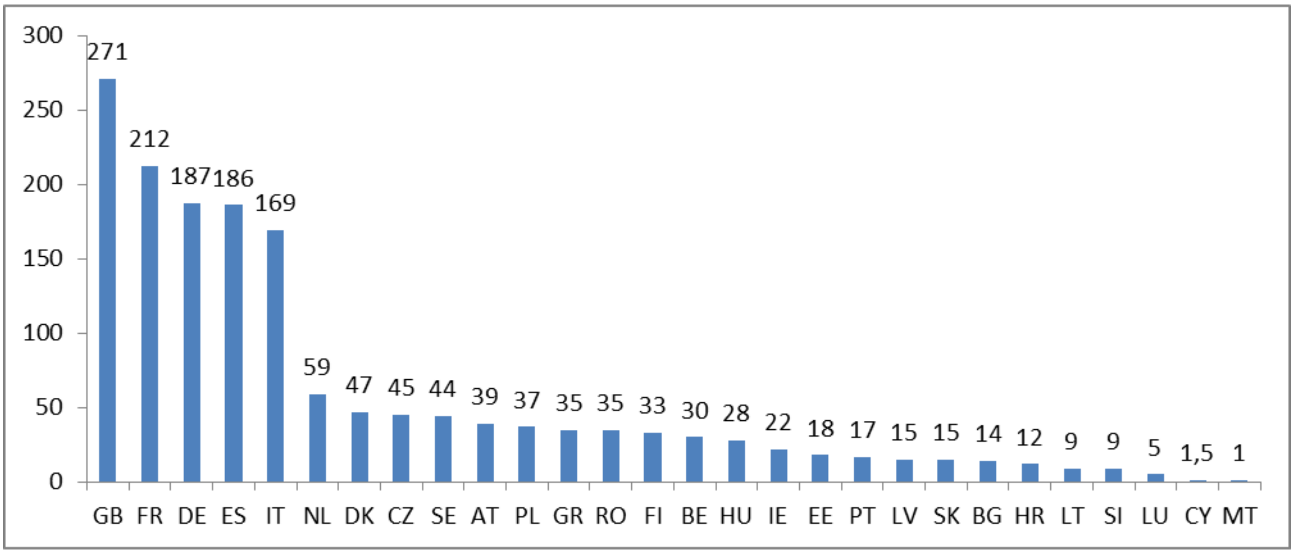
The remaining 13 countries - Hungary, Ireland, Estonia, Portugal, Latvia, the Slovak Republic, Bulgaria, Croatia, Lithuania, Slovenia, Luxembourg, Cyprus and Malta - accounted for 10% of average film production volume in a given year.

This repartition distribution key is of importance, as the following sections will show that EU non-national film exports were correlated to the film production volume.

Another important fact to keep in mind is that co-productions represented on average 22% of all feature films produced in the EU (see Figure 3). For three countries, Cyprus, Belgium and Ireland, majority co-productions comprised the main feature films produced, with a share above 50%. For Luxembourg, Portugal, the Slovak Republic, the Netherlands and Spain (almost), co-productions made up more than one third of feature film production in a given year.

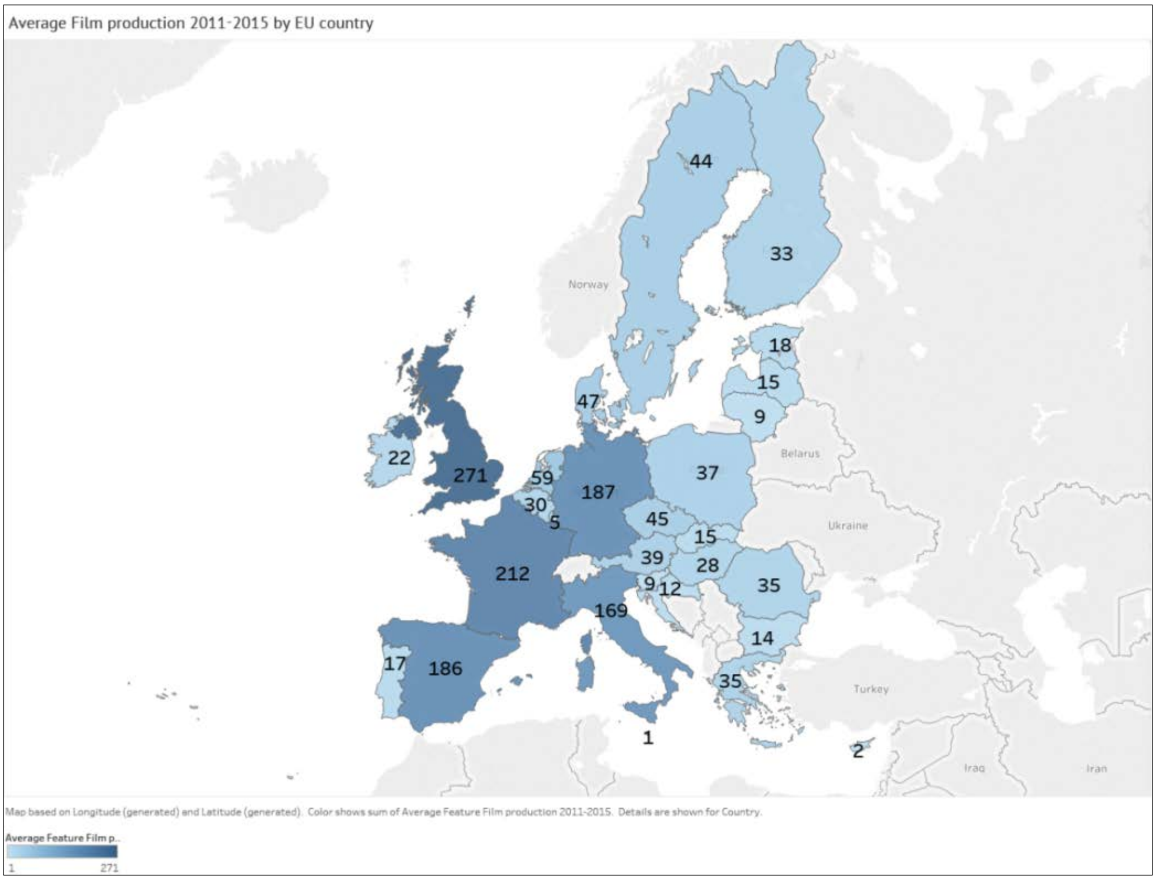
Finally, for some countries, minority co-productions were also of importance (see Figure 4 and Figure 5). Minority co-productions were not included in the figures above or in the datasets of this report for the production volume of each country (only majority co-productions were). The background data are only presented in order to highlight the importance of minority co-productions for several countries, as for Luxembourg (2.7 times more minority co-productions than national productions and majority co-productions) or Belgium, which produced on average as many minority co-productions as feature films per year. On average, EU countries produced 12 films per year as a minority co-producer. France, the no. 2 producer of feature films, was also the country that co-produced most frequently -as a minority partner, with 63 minor coproductions on average per year.

Figure 1. Average feature film production per year 2011-2015 by EU country, in numbers



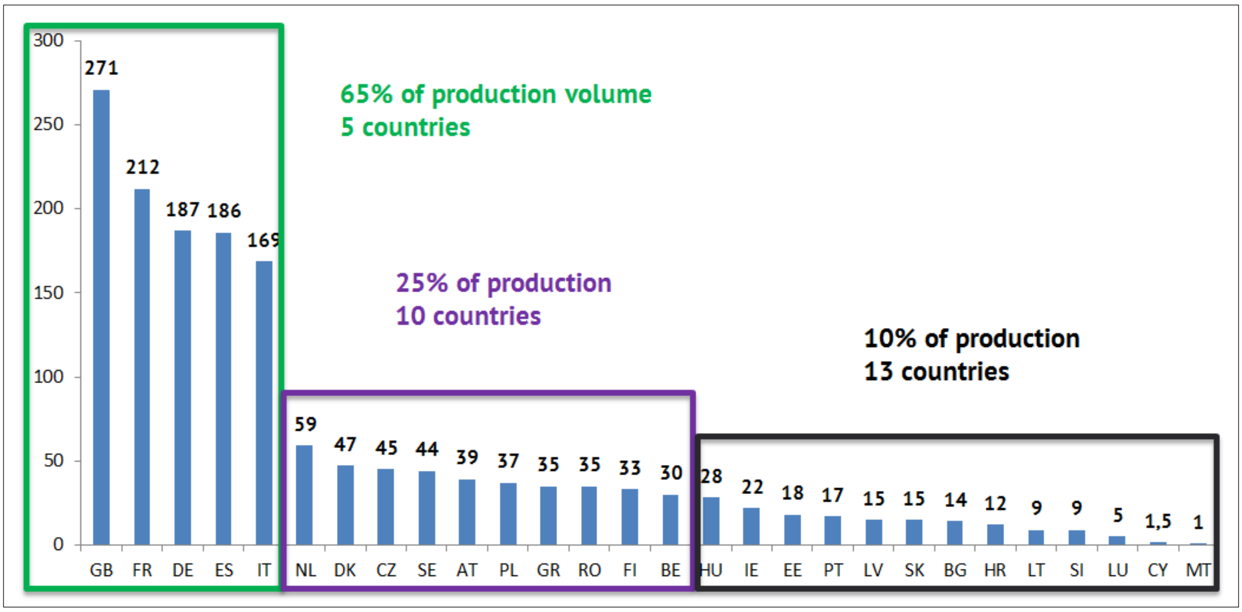
Source: Yearbook 2016, European Audiovisual Observatory

Map 1 Average yearly feature film production in the EU 2011-2015



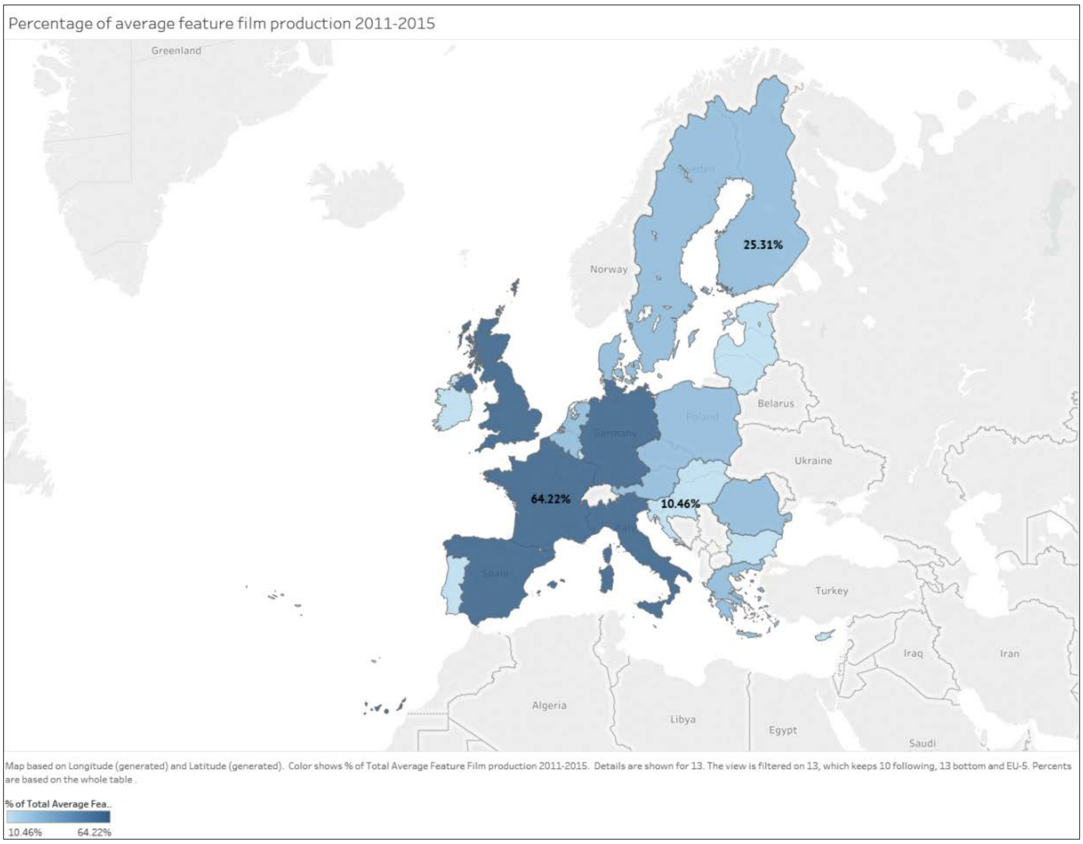
Source: Yearbook 2016, European Audiovisual Observatory

Figure 2. **Split of average feature film production by country groups**



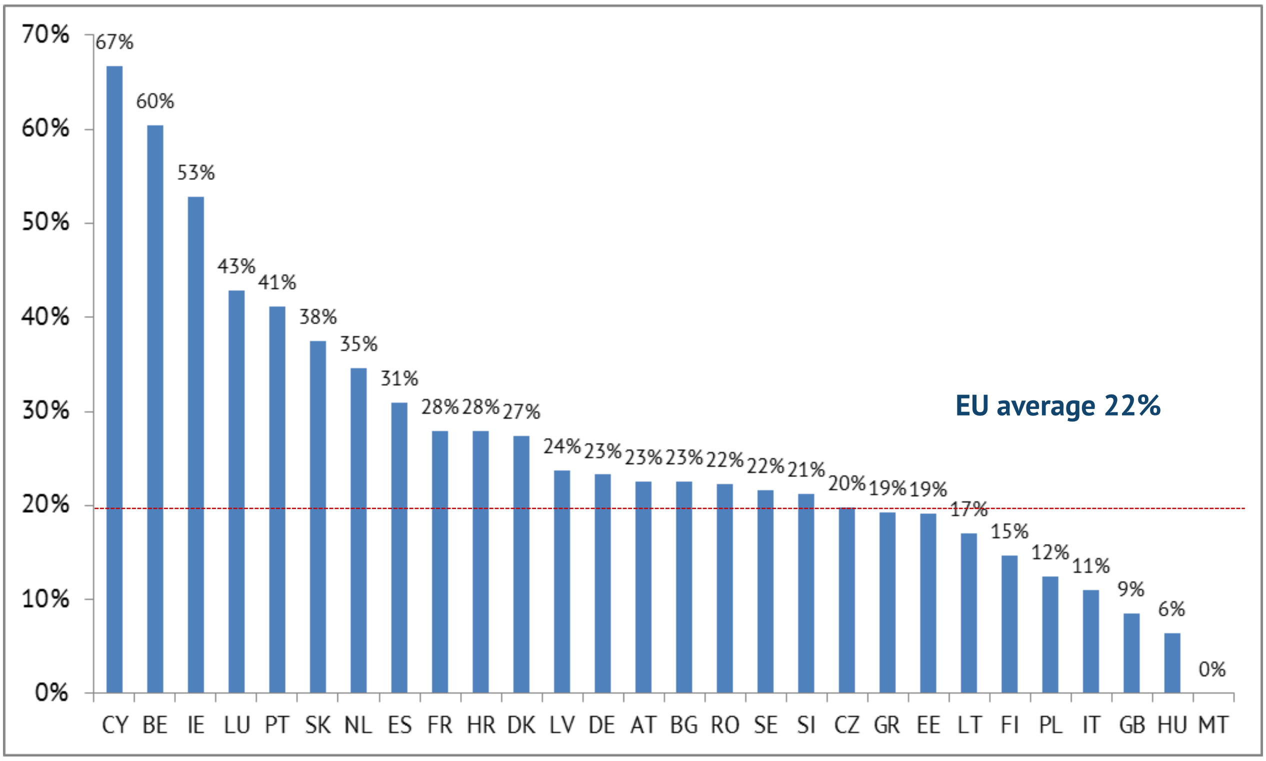
Source: Yearbook 2016, European Audiovisual Observatory

Map 2 **Distribution key of average film production – 3 groups of film - producing countries, in % of yearly total EU film production**



Source: Yearbook 2016, European Audiovisual Observatory

Figure 3. Average share of majority coproduction out of total feature film production by country, in % of total



Source: Yearbook 2016, European Audiovisual Observatory

Map 3 Average share of majority coproduction out of total feature film production by country, in % of total

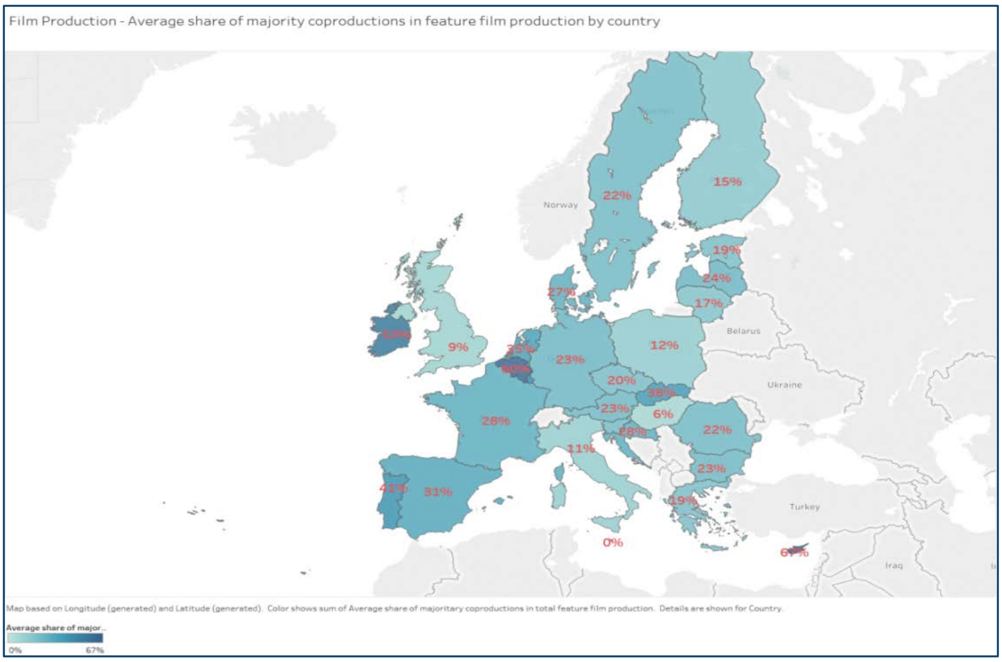
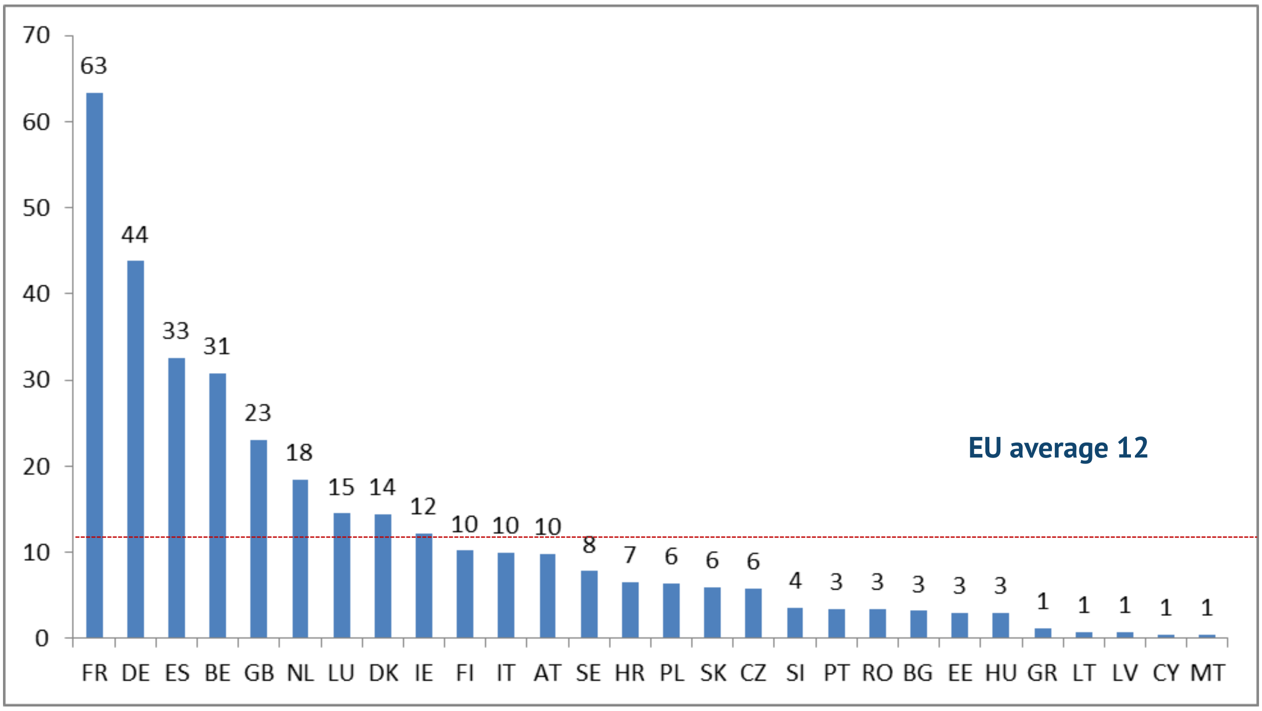
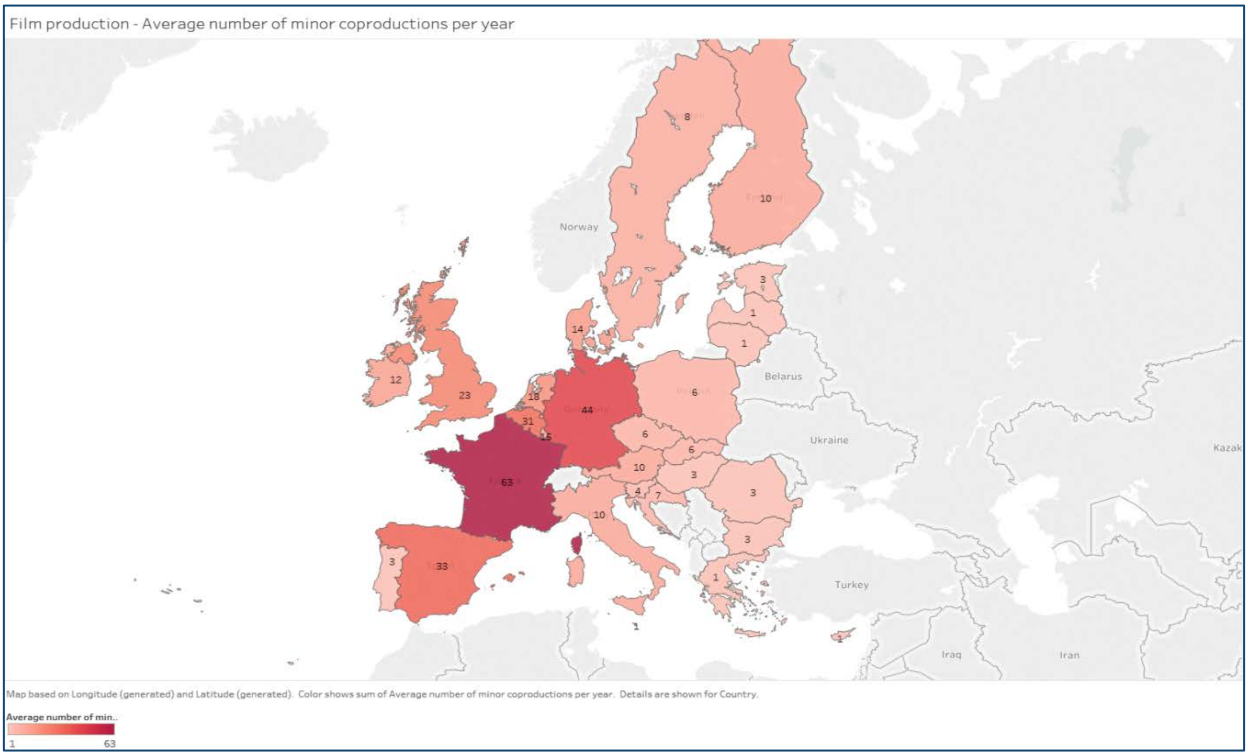


Figure 4. Average number of minority co-productions by year by country, in units



Source: Yearbook 2016, European Audiovisual Observatory

Map 4. Average number of minority co-productions by year by country, in units



Source: Yearbook 2016, European Audiovisual Observatory

Map 5 Ratio minority co-productions / total feature film production by country, in %

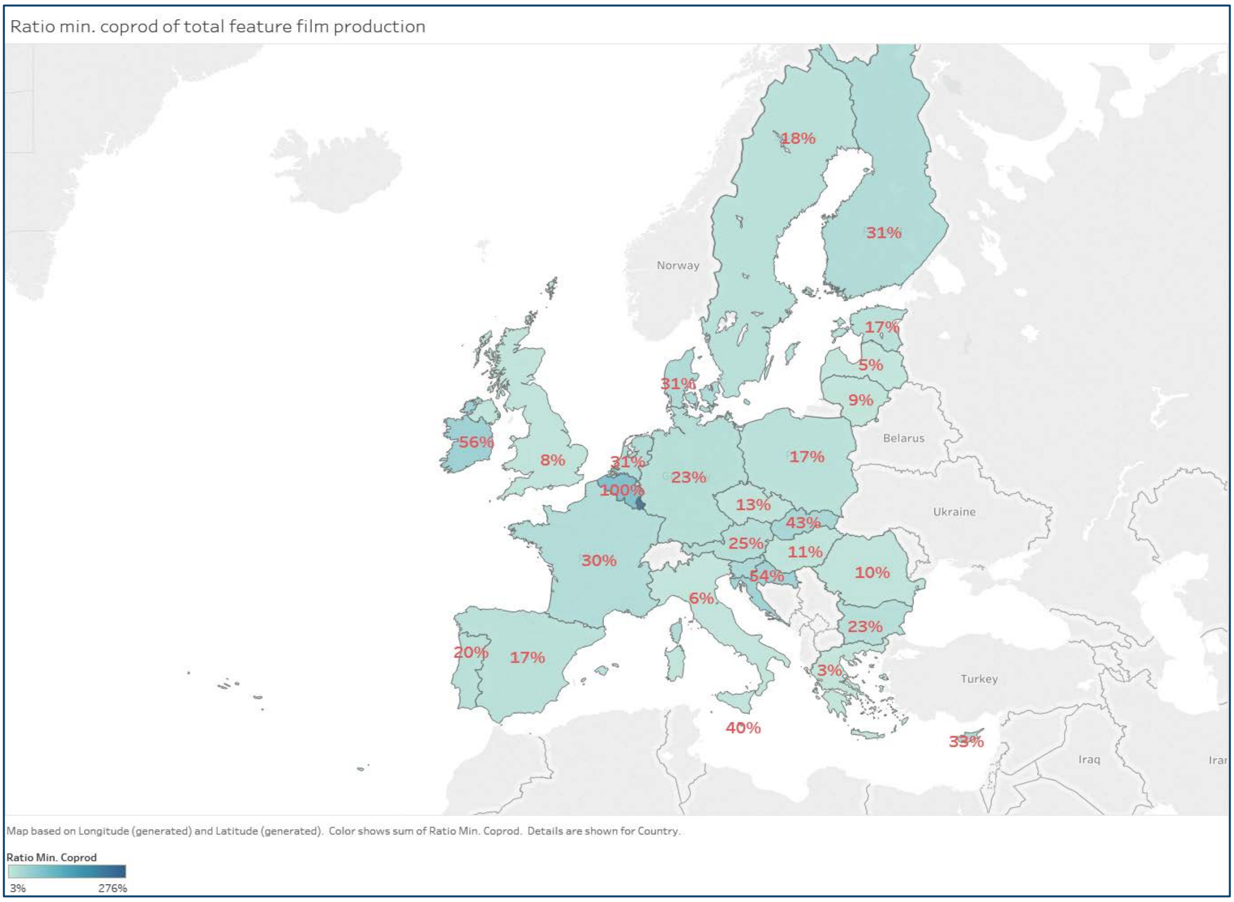
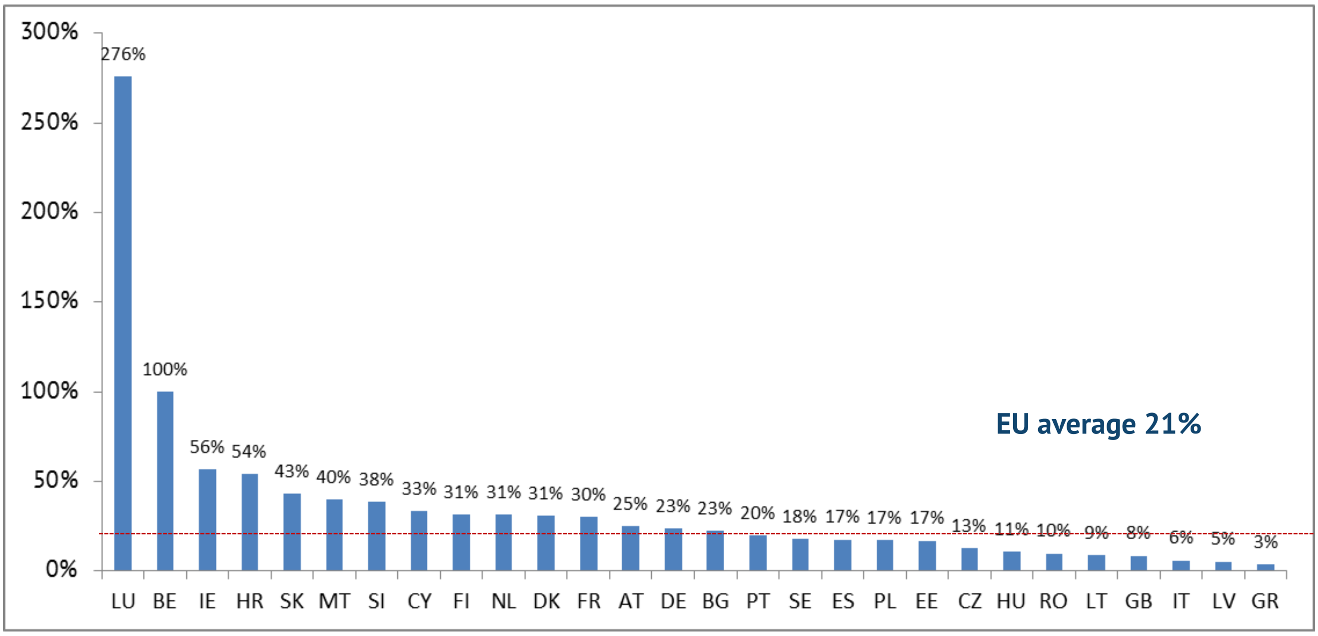


Figure 5. Ratio minority co-productions / feature film production by country, in % of feature films



Source: Yearbook 2016, European Audiovisual Observatory

1.3. Methodology and limits of datasets and report

The datasets of this report are composed of:

- LUMIERE1 data for films on first release in cinemas in 25 EU countries2 in 2015.
- EurodataTV3 for films broadcasted in 18 EU countries4 during the TV season September 2015 to June 2016, comprising 131 TV channels (public, commercial and pay TV).
- European Audiovisual Observatory data5 for films available in 68 TVOD catalogues in 26 EU countries6 (pan-European and national TVOD services).

Methodology:

- A film title is only counted once per country, for each distribution platform.
- The objective of the report is to analyse the circulation of films. Therefore, weconsider a film as available, released or broadcasted if it was present on the distribution platform once. The same film title can thus be present in the same country a maximum of three times (once in cinemas, once on TV, once on TVOD).
- Country of origin of a film is attributed to: 100% national productions + majority co-productions (minority co-productions not included).
- Country of origin is established by looking up film titles in the LUMIERE database (and where not available IMDb).
- LUMIERE data is compiled by the European Audiovisual Observatory and its partners in the 26 out of 28 EU countries.
- EurodataTV film data was purchased and is composed of a representative channel sample in each country comprising the main public, commercial and pay TV

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[1] See http://lumiere.obs.coe.int/web/search/.

[2] Not included are the cinema markets of Croatia, Ireland and Malta.

[3] See http://www.mediametrie.fr/eurodatatv/pages/eurodata-tv-worldwide.php.

[4] National TV markets included are: Austria, Belgium, the Czech Republic, Germany, Denmark, Spain, Finland, France, the United Kingdom, Croatia, Hungary, Ireland, Italy, the Netherlands, Poland, Romania, Slovenia and Sweden.

[5] See Fontaine and Grece, « *Origin of films and TV content in VOD catalogues in the EU & visibility of films on VOD services »,* European Audiovisual Observatory April 2017, available here http://www.obs.coe.int/industry/video/-/asset_publisher/H7fRZzJl0wZv/content/2016-originoffilmsintvodandsvodcatalogues-visibilityoffilms.

[6] Not included are TVOD services in Croatia and Romania.

channels. Minor errors regarding the country of origin could exist in the sample, below 5%.

- TVOD data was compiled by the Observatory by looking at the composition of 68 TVOD catalogues in 26 EU countries. The identification error rate of country of origin for film titles is below 10% (closer to 5%-6%).

Limitations of the report:

- The main limitation is that no consumption data is included for each film title, meaning that relative commercial success/flop data, as well as audience appreciation, are not included. This is a major caveat for which there is no immediate solution as consumption data for films on TVOD services are not public (no data on the purchase or rental of individual film titles) and audience data for films on TV channels is cost-prohibitive.

- In each dataset, several EU countries are missing. The data on films on TV includes 18 EU markets, data on films in cinemas includes 25 EU countries in this report (the Belgian and Greek markets are however not 100% covered) and the data on film in TVOD catalogues includes 26 EU countries.

- TVOD data comprises a small selection of pan-European and national services. The data is therefore not comprehensive and is only a sample of the films available on a given market. However, we estimate that the selected services are a good reflection of what is available and are commercially relevant to each market.

- TVOD data comprises only “over-the-top” TVOD services. TVOD services on managed networks (cable, IPTV) are not included in the dataset.

- TVOD data offer only an October 2016 snapshot. TVOD catalogues change over time so the representation is only valid for this time period.

- Some identification errors may have occurred for TV and TVOD data, although the error rate is below 5% and 10% in general.

- TV data reflects a selection of TV channels in any given country, and encompasses 131 TV channels in total. The picture is not completely comprehensive but covers the main TV channels and is a good representation of films broadcasted on the 18 EU markets of the dataset.

2. The export of EU non-national films

2.1. Executive summary - Key messages on the export of EU non-national films

EU non-national films do circulate

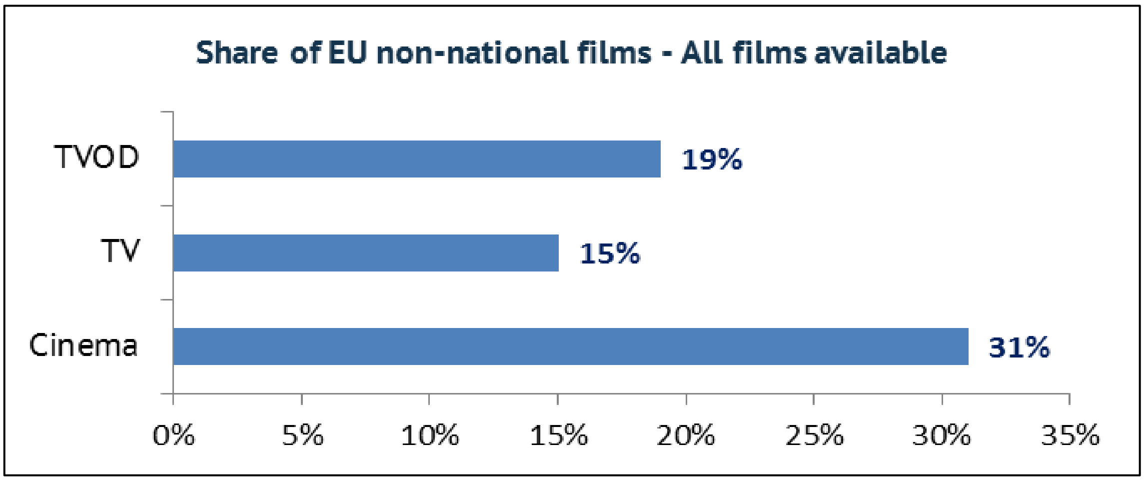
- EU non-national films were the second biggest category of films, behind international films, and ahead of national films, and this for all three distribution platforms(see Sections 2.2 to 2.2.4 and Section 2.4).

- The highest share of EU non-national films was found in cinemas, with 31% of total film offerings, and the lowest was on TV, with 15%.

- Cultural proximity and a shared language played a role, notably in the exchanges for France/Belgium, Belgium/Netherlands, Austria/Germany, Slovak Republic/Czech Republic and the Nordics.

- However, they did not have an outsized impact on the general exchange flow and did not constitute the sole explanation for the circulation figures of EU non-national films.

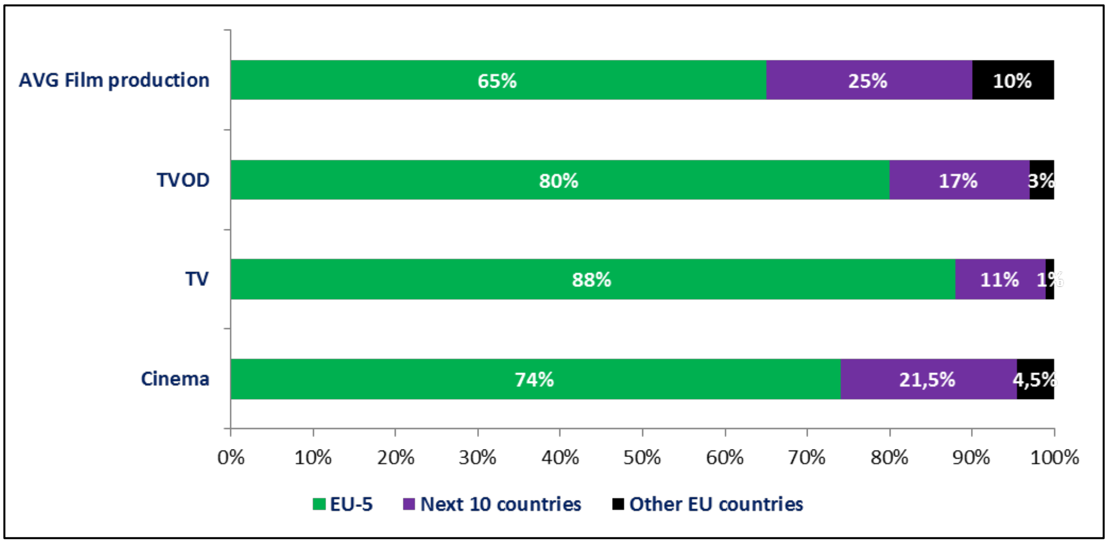
Figure 6. Share of EU non-national films in total film offerings for the 3 distribution platforms



Volume of film production a key factor for EU non-national film exports…

- The leading film-producing countries accounted for the lion's share of EU non-national film exports and a correlation exists between the level of intra-EU film exports of a country and its production volume.
- EU-5 countries accounted on average for 65% of total EU feature film production but their share of EU non-national films was even more noteworthy. The main EU production countries, France and the United Kingdom, accounted for more than 50% of all EU non-national films on the three platforms.
- The next 10 countries by feature film production represented on average 25% of the yearly EU feature film production volume but only 11% of EU non-national film exports on TV, 17% on TVOD and 21.5% in cinemas.
- The remaining 13 EU countries by production volume represented 10% of the average feature film production volume in the EU but only 1% of EU non-national films on TV, 3% on TVOD and 4.5% in cinemas(see Section 2.4).

Figure 7. Comparison between country clusters for film production, and exports of EU non-national films in cinemas, on TV and TVOD, in % of total

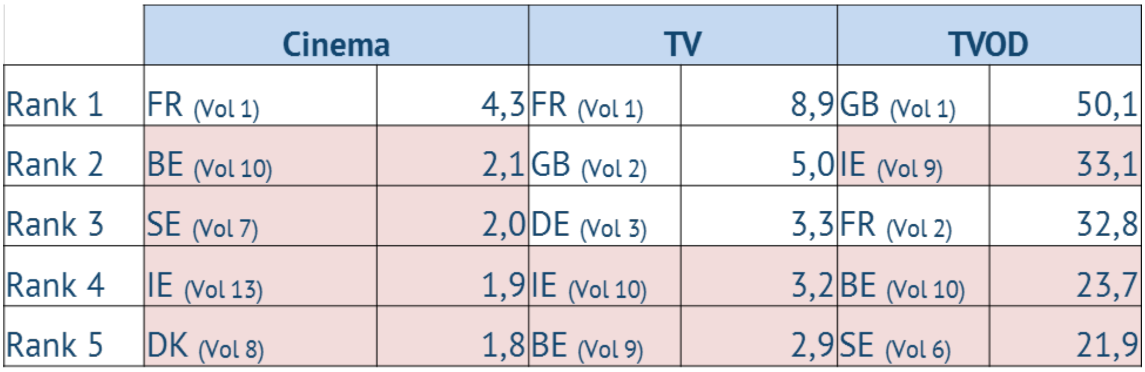


Source: OBS, LUMIERE, Yearbook 2016, EurodataTV

… but volume of production is not the sole possible form of measurement

- The introduction of a relative measure of film exports compared to average national film production shows that smaller film volume-producing countries can be more efficient when it comes to film exports inside the EU (see section 2.5).
- This shows that export volume is not the sole possible form of measurement for EU non-national film exports; the relative export strength compared to feature film production volume is also an important measure.
- In order to reflect this relative importance of exports to film production volume, an “export effiency ratio” has been introduced to compare the broader results with those based uniquely on export volume.
- Countries such as Belgium, Sweden, Ireland and Denmark appear to be more efficient than countries that produced greater volumes of film, such as Spain, Italy and in the case of TVOD, Germany when it comes to EU non-national film imports.

Table 1. **Export effiency ratio for cinema, TV and TVOD – 5 most efficient EU non-national export countries**



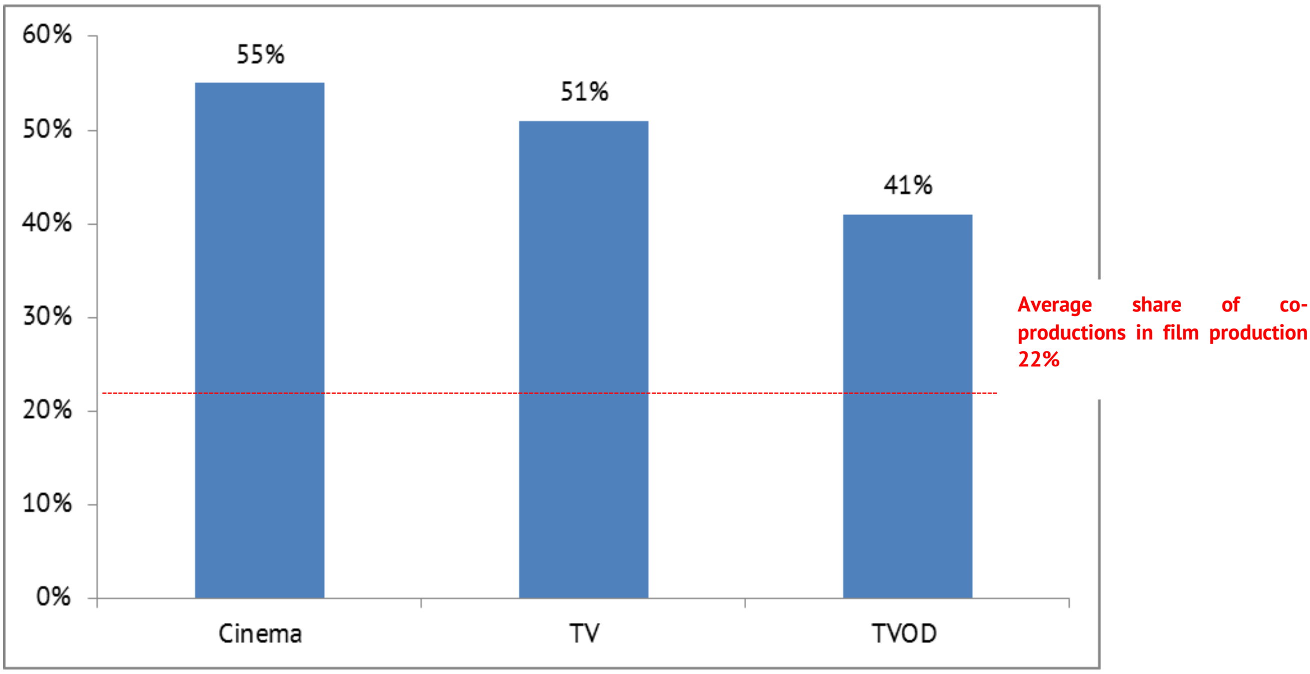
	Cinema		TV		TVOD	
Rank 1	FR (Vol 1)	4,3	FR (Vol 1)	8,9	GB (Vol 1)	50,1
Rank 2	BE (Vol 10)	2,1	GB (Vol 2)	5,0	IE (Vol 9)	33,1
Rank 3	SE (Vol 7)	2,0	DE (Vol 3)	3,3	FR (Vol 2)	32,8
Rank 4	IE (Vol 13)	1,9	IE (Vol 10)	3,2	BE (Vol 10)	23,7
Rank 5	DK (Vol 8)	1,8	BE (Vol 9)	2,9	SE (Vol 6)	21,9

Co-productions travelled better in general and were of major importance for smaller film volume-producing countries for their EU non-national exports.

Co-productions represented between 42% and 55% of EU non-national films but only 22% of EU film production, showing the over-representation of co-production in the circulation of EU films.

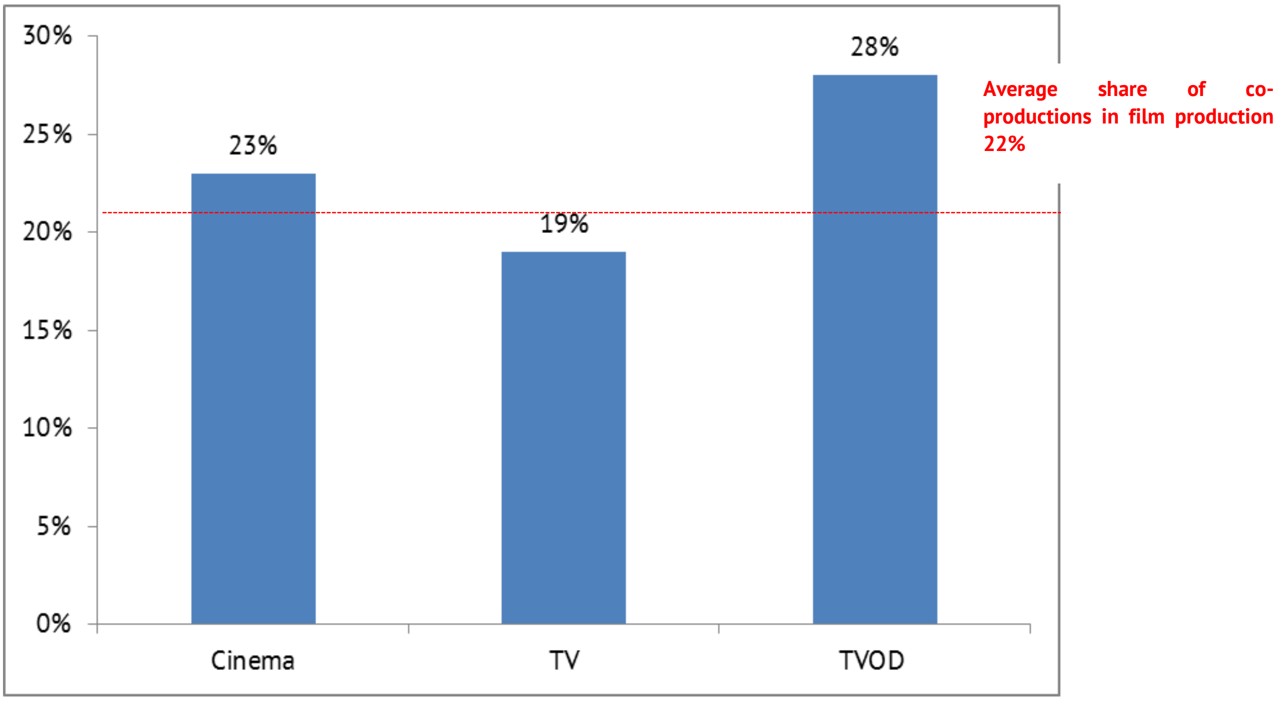
- Co-productions travelled better in cinemas (55% of all EU non-national films) and by a slight margin on TV (51%) (see Section 2.3).
- On TVOD, 100% single national productions made up the largest share of EU non-national films, with 58%, and co-productions constituted 42%.
- However, considering that only 22% of feature films produced in the EU were on average co-productions, co-productions were overrepresented in EU non-national films; this indicates that co-productions clearly had an advantage when it came to travel inside the EU (mainly because co-producing countries also facilitate the arrival of their minor co-productions on their market – be it for cinemas, on TV or on TVOD).
- Co-productions were the main export for smaller volume-producing countries and for some were even the sole films exported.
- For TVOD, considering the large number of films available, the picture was less clear – the impact of co-productions and 100% national productions for exports was different depending on the country of origin.
- The importance of co-productions for intra-EU exchanges becomes more visible when only national films are considered (national films on their national market).
- Co-productions on their national market represented only 23% in cinemas, 19% on TV and 28% on TVOD, the rest being 100% national productions.

Figure 8. **Share of co-productions among EU non-national films by distribution, in % of total**



Source: LUMIERE, OBS on EurodataTV, OBS

Figure 9. **Share of co-productions among national films available by distribution, in % of total**



Source: LUMIERE, OBS on EurodataTV, OBS

Comparison of the 3 distribution methods for EU non-national films

- Total EU non-national films: Unsurprisingly, TVOD, with the greatest capacities, also had the largest number of EU non-national films, followed by TV and cinema. It should be noted that EU-5 countries dominated the export of intra-EU films, as exports are closely correlated to film production volume. Inside the EU-5 countries, French and British films made up the lion's share of all EU non-national films with shares above 50% for all three distribution platforms.

- Single film titles: As with total films, TVOD services and their much bigger capacities provided the highest number, also when it came to single film titles, with 8 973 titles, followed by TV with 2 864 and cinema with 866 film titles. Here again, EU-5 titles, and especially French and British film titles, took the lion's share.

- Average circulation: When a film was exported inside the EU, TVOD provided the widest circulation, with 3.7 countries on average, followed by cinemas with 2.9 countries and TV with 1.8 countries. This indicator also shows that whereas films tend to circulate more widely on TVOD and in cinemas, TV remains a space where audiences appear to prefer national productions, big budget films and films characterised by language and cultural proximity.

- Average reach: TVOD allows films produced in most countries to potentially reach other EU countries, followed by distribution in cinemas and TV.

Table 2. Summary table of cinema, TV and TVOD for main indicators

	Cinema	TV	TVOD
Total EU non-national films	2 501	5 058	33 810
Single film titles	866	2 864	8 973
Average circulation	2.9	1.8	3.7
Average reach *(max)*	15 *(24)*	9 *(17)*	22 *(25)*
Share of co-productions	55%	51%	41%

Source: LUMIERE, EurodataTV, OBS on EurodataTV, OBS

2.2. EU non-national film exports in cinemas, on television and on TVOD – a pan-European overview

This section presents in detail the data for intra-EU film exports, first for films released in EU cinemas in 2015 as first-releases, then for films broadcasted in the 18 countries for which Eurodata TV provided data on the September 2015 to June 2016 season and finally for TVOD catalogues. As film titles are only counted once for each distribution method, the data only shows the circulation of film titles.

One should keep in mind that the data is not weighted, meaning that no consumption data such as admissions for films in cinemas, audiences per films broadcasted or transactions for films on TVOD is reflected in the data (except for the first part, where cinema admissions data provided by the LUMIERE database is used to establish a general split of admissions between international, national and EU non-national films). Basically, a blockbuster has the same weight as an art house film.

However, in order to offer a general indication of the relationships between the most successful films outside their national market, the widest-circulating films in the EU and films with the most admissions, section 2.2.1 provides the main numbers for cinema admissions (national, EU non-national) and circulation for the top 20 films in each category; EU non-national admissions; widest circulation in the EU; and most overall admissions in the EU.

2.2.1. Avant-propos: Admissions to EU non-national films in EU cinemas

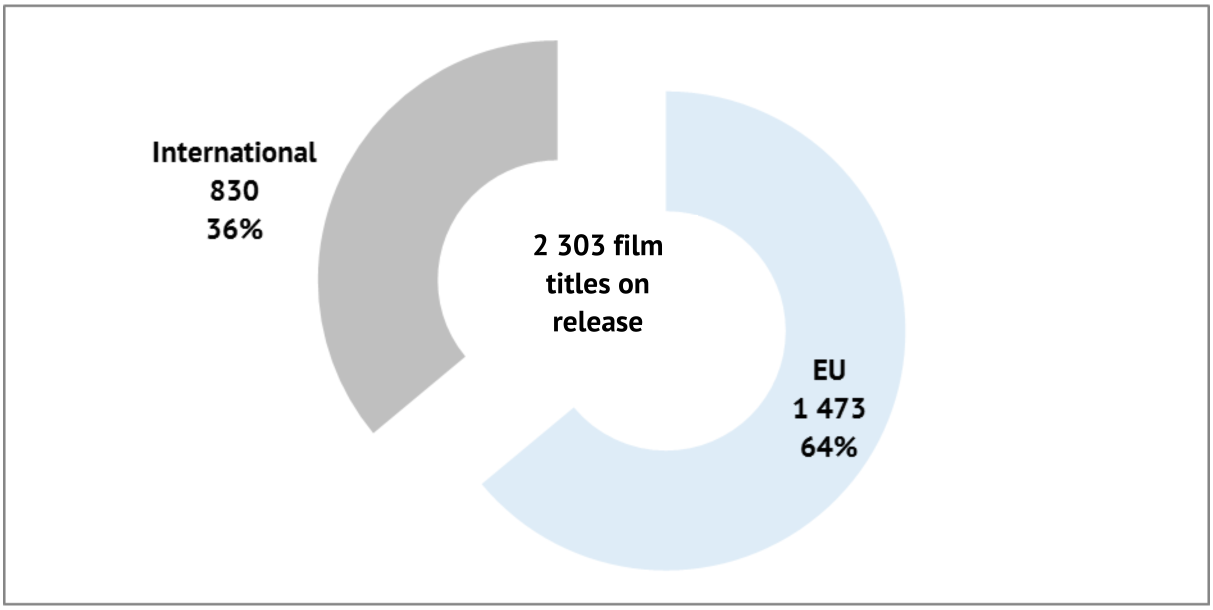
EU films accounted for 64% of all new film titles on release in the EU ...

but for only 26% of overall admissions to films in the EU

(7% of overall admissions to EU non-national films, 19% to national films).

The dataset for films on first release in EU cinemas in 2015 consists of 8 133 film releases in the 26 EU countries tracked by LUMIERE (Ireland and Malta are not tracked by LUMIERE). The 8 133 releases correspond to 2 303 single film titles of which 1 473 were EU film titles, i.e. 63% of all film titles released were of EU origin.

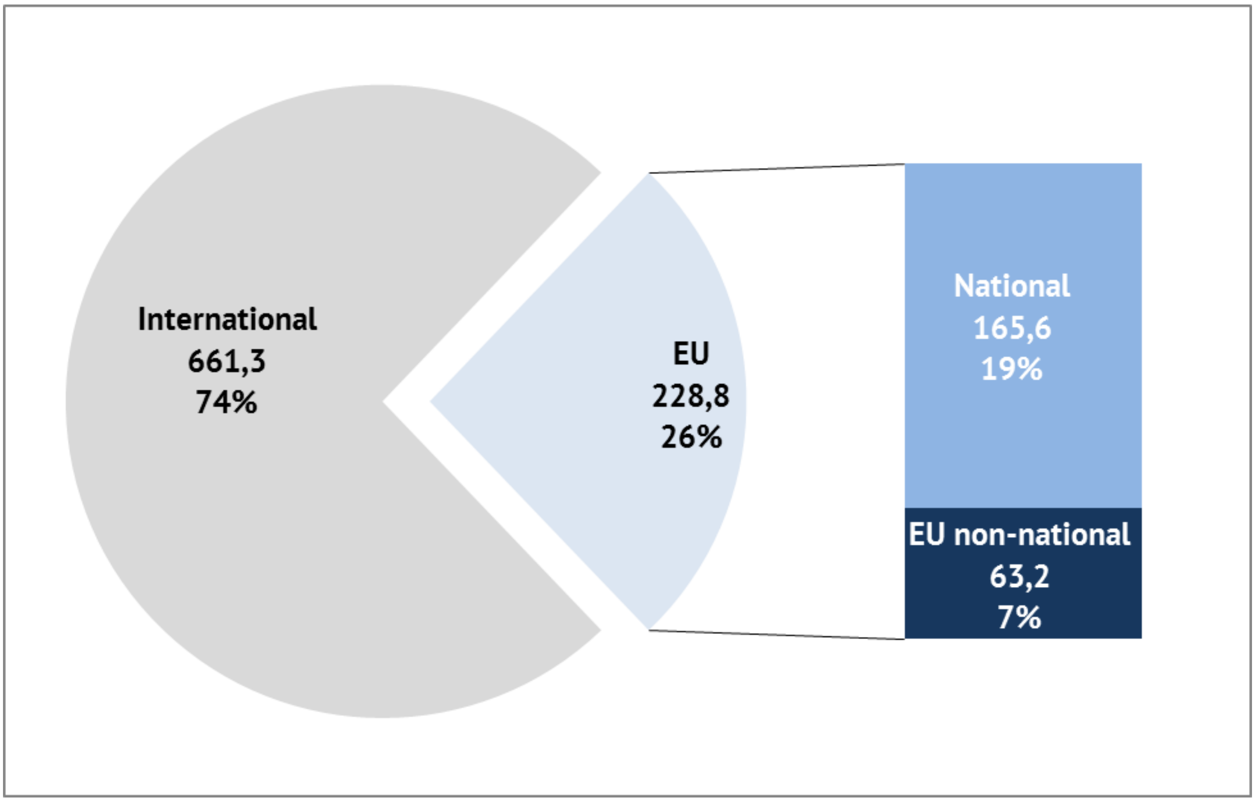
Figure 10. Number of film titles on first release in the EU 2015, in units



Source: LUMIERE

These 8 133 film releases generated admissions of 890.15 million. Out of these 890.15 million admissions for all films on a first release in EU cinemas, EU films (national and non-national) generated 228.81 million admissions, or 26% of total admissions in 2015 for first-releases[7]. When only admissions to EU films other than their national territory are considered, admissions to EU non-national films in another word, admissions represented 63.17 million, or 7.1% of all admissions for first releases in 2015. Admissions to national EU films on the other hand were at 165.63 million or 19% of total admissions.

Figure 11. Admissions split for films on first release in cinemas in the EU 2015 by country of origin, in millions



Source: LUMIERE

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[7] Films with a main origin in the UK but financed mainly by US capital, marked in LUMIERE as GB Inc, are counted as international films. There were 13 films on first release in the EU with such an origin which generated 59.1 million admissions. The films were *Kingsman: Secret Service; The Second Best Exotic Marigold Hotel; Before I Go To sleep; Black Sea; Ex Machina; Spectre; The Theory of Everything; Woman in Gold; Far from the Madding Crowd; Mr. Holmes; Absolutely Anything; The Woman in Black 2; Angel of Death;* and *Legend.*

- Some insights based on the most successful films in EU cinemas in non-national admissions and widest circulation

Factors influencing the circulation and admissions for EU non-national films:

- Co-produced
- Film festival wins and nominations
- Language – English (and French)

"EU blockbusters" circulated well, like US blockbusters; however, EU films generally generated most of their admissions in their home market.

From the data at hand, it becomes clear that even if the demand for EU non-national films was lower than for international or national films on a pan-European level, the demand existed, representing 7% of admissions to films on a first release in the EU in 2015.

Table 3 shows the top 20 EU films with the highest non-national admissions; out of 20 films, 14 are co-productions. This tends to confirm the perception and the results of past studies[8] showing that co-productions travel better in general than 100% national productions.

Furthermore, with the notorious exception[9] of the German comedy film *Fack ju Göhte 2*, all films were released in more than 11 EU markets. Also, for these top-grossing films outside their national market, excepting *Fack ju Göhte 2,* the British biography/history drama *Suffragette* and the Swedish drama comedy *En man som heter Ove*, all generated most of their admissions in the EU outside their national market and more than half were shot in English, which could be an additional factor that boosted their non-national admissions.

Table 4 presents the top 20 films with the widest circulation in EU cinemas. Only seven films made their entry into this top list, demonstrating that widest circulation does not equal highest admissions. Here again, out of these 20 films, 15 are co-productions.

Actually, only two 100% nationally produced films figure on the list: the French *Dheepan* (which won a Palme d'Or at the 2015 Cannes festival and won or was nominated at several other festivals) and the German *Victoria* which also won and was nominated at

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[8] See C. Grece, *How do films circulate on VOD services and in cinemas in the European Union – A comparative analysis*, European Audiovisual Obeservatory, May 2016
M. Kanzler, S. Newman-Baudais, A. Lange, *The circulation of European co-productions and entirely national films in Europe,* European Audiovisual Observatory, September 2008

[9] Comedies have in general difficulties travelling well, as cultural proximity plays an important role in the export of national comedies; non-national admissions represented only 12% of total admissions for this film, with more than 50% of non-national admissions coming from Austria with 630 955 admissions, and 20% from the Czech Republic with 219 260 admissions

several festivals, such as the Berlin International Films Festival, Bambi Awards, German Film Awards and others.

Looking at the other films that appear on this top list of films with the widest circulation (all others are co-productions), the film *Saul Fia* racked up an Oscar, a Golden Globe, several prizes at the Cannes festival, 55 other festival wins and 54 festival nominations. The French-Belgian *Love* was nominated at the Cannes festival, the Italian-French-British-Swiss *Mia Madre* won at 11 festivals and was nominated at 23 and the Spanish-German film *Ma Ma* won four festival prizes and was nominated at 14.

The only film without a festival win and only one nomination on the list is the German-American *She's Funny That Way*, shot in English and with international film celebrities such as Owen Wilson and Jennifer Aniston, which may explain its wide circulation in EU cinemas (21 other EU markets).

Finally, in order to compare the films with the most non-national admissions and the widest circulation, Table 5 shows the top 20 EU films with most overall admissions in the EU (national and non-national). Surprisingly, 12 films make their entrance, nine of them 100% nationally produced (as opposed to the previously-mentioned lists, where co-productions played a predominant role). Another major difference with the previous top lists is that only six films on this one generated more admissions outside their home market and two films weren't released outside their national market (the Polish *List do M. 2* and the Italian *Si Accettano Miracoli*).

Only five films were released in more than 20 non-national markets and made it into the list of films with most non-national admissions, mostly EU blockbusters or animation films, such as *Taken 3* (budget estimated at USD 48 million by IMDb), *Shaun the Sheep Movie* (budget USD 25 million), *The Little Prince* (budget USD 81 million), *The Danish Girl* (budget USD 15 million with 31 festival wins of which one Oscar) and *Youth* (budget USD 12 million with H. Keitel, M. Caine and P. Sorrentino as director).

Table 3. Top 20 EU films with highest non-national admissions in 2015, in units and %

Original title	Prod.Year	Prod.Country	Share EU non-national admissions	EU non-national Admissions	National Admissions	Total Admissions	Number of non-national EU release markets
Taken 3	2014	FR	72%	6 772 940	2 613 428	9 386 368	24
Shaun the Sheep Movie	2015	GB	74%	5 364 936	1 906 764	7 271 700	24
The Little Prince	2015	FR / US	66%	3 685 093	1 914 354	5 599 447	23
The Danish Girl	2015	GB / US / BE / DK / DE	75%	3 147 742	1 033 198	4 180 940	23
Carol	2015	GB / US / AU	83%	1 938 192	389 307	2 327 499	20
Le tout nouveau testament	2015	BE / LU / FR	86%	1 832 189	289 962	2 122 151	21
Ooops! Noah is Gone...	2015	DE / BE / LU / IE	87%	1 756 235	268 936	2 025 171	19
Youth	2015	IT / FR / GB / CH	61%	1 530 455	973 628	2 504 083	23
Heidi	2015	DE / CH	53%	1 408 965	1 246 578	2 655 543	7
Suffragette	2015	GB	48%	1 286 991	1 381 025	2 668 016	17
Amy	2015	GB / US	70%	1 218 788	521 405	1 740 193	24
Suite Française	2014	FR / GB / CA / BE	82%	1 088 365	242 542	1 330 907	11
The Transporter Refueled	2015	FR / CN / BE	64%	1 066 516	595 302	1 661 818	24
Fack ju Göhte 2	2015	DE	12%	1 030 715	7 716 114	8 746 829	7
Brooklyn	2015	GB / IE / CA	55%	989 775	813 310	1 803 085	16
45 Years	2015	GB	79%	940 039	251 652	1 191 691	20
Belle et Sébastien, l'aventure continue	2015	FR	43%	921 229	1 216 493	2 137 722	14
En man som heter Ove	2015	SE / NO	34%	889 582	1 714 994	2 604 576	11
Macbeth	2015	GB / FR	68%	860 897	399 913	1 260 810	21
The Lobster	2015	IE / FR / GB / NL / GR	n/a	838 390	n/a	838 390	14

Source: LUMIERE

Table 4. Top 20 EU films with widest circulation in EU cinemas, in units and %

Ranking by EU non-national admissions	Original title	Prod.Year	Prod.Country	Number of non-national EU release markets	Share EU non-national admissions	EU non-national Admissions	National Admissions	Total Admissions
1	Taken 3	2014	FR	24	72%	6 772 940	2 613 428	9 386 368
2	Shaun the Sheep Movie	2015	GB	24	74%	5 364 936	1 906 764	7 271 700
11	Amy	2015	GB / US	24	70%	1 218 788	521 405	1 740 193
13	The Transporter Refueled	2015	FR / CN / BE	24	64%	1 066 516	595 302	1 661 818
3	The Little Prince	2015	FR / US	23	66%	3 685 093	1 914 354	5 599 447
4	The Danish Girl	2015	GB / US / BE / DK / DE	23	75%	3 147 742	1 033 198	4 180 940
8	Youth	2015	IT / FR / GB / CH	23	61%	1 530 455	973 628	2 504 083
46	**Dheepan**	2015	FR	23	31%	283 147	644 943	928 090
23	**Saul fia**	2015	HU / US / FR / IL / BA	22	71%	651 415	268 714	920 129
75	**Love**	2015	FR / BE	22	67%	126 477	61 543	188 020
6	Le tout nouveau testament	2015	BE / LU / FR	21	86%	1 832 189	289 962	2 122 151
19	Macbeth	2015	GB / FR	21	68%	860 897	399 913	1 260 810
28	**She's Funny That Way**	2014	DE / US	21	90%	579 285	63 032	642 317
31	**Mia madre**	2015	IT / FR / GB / CH	21	45%	477 645	591 321	1 068 966
5	Carol	2015	GB / US / AU	20	83%	1 938 192	389 307	2 327 499
16	45 Years	2015	GB	20	79%	940 039	251 652	1 191 691
65	**Victoria**	2015	DE	20	28%	160 203	407 972	568 175
78	**Ma ma**	2015	ES / FR	20	45%	114 146	138 902	253 048
7	Ooops! Noah is Gone...	2015	DE / BE / LU / IE	19	87%	1 756 235	268 936	2 025 171

Source: LUMIERE

Table 5. Top 20 EU films by total admissions in EU cinemas in 2015, in units and %

Ranking by EU non-national admissions	Original title	Prod.Year	Prod.Country	Number of non-national EU release markets	Share EU non-national admissions	EU non-national Admissions	National Admissions	Total Admissions
1	Taken 3	2014	FR	24	72%	6 772 940	2 613 428	9 386 368
14	Fack ju Göhte 2	2015	DE	7	12%	1 030 715	7 716 114	8 746 829
2	Shaun the Sheep Movie	2015	GB	24	74%	5 364 936	1 906 764	7 271 700
312	**Ocho apellidos catalanes**	2015	ES	3	0,1%	4 010	5 678 616	5 682 626
3	The Little Prince	2015	FR / US	23	66%	3 685 093	1 914 354	5 599 447
42	**Les nouvelles aventures d'Aladin**	2015	FR / BE	8	7%	323 010	4 377 528	4 700 538
45	**Papa ou maman**	2015	FR / BE	13	7%	291 706	3 920 074	4 211 780
4	The Danish Girl	2015	GB / US / BE / DK / DE	23	75%	3 147 742	1 033 198	4 180 940
54	**Les profs 2**	2015	FR	3	5%	192 896	3 494 099	3 686 995
646	**Listy do M. 2**	2015	PL	0	n/a	-	2 968 327	2 968 327
36	**Er ist wieder da**	2015	DE	5	14%	404 997	2 481 692	2 886 689
430	**Palmeras en la nieve**	2015	ES	1	0,03%	945	2 704 817	2 705 762
10	**Suffragette**	2015	GB	17	48%	1 286 991	1 381 025	2 668 016
22	**Atrapa la bandera**	2015	ES	8	27%	724 766	1 936 424	2 661 190
9	Heidi	2015	DE / CH	7	53%	1 408 965	1 246 578	2 655 543
18	En man som heter Ove	2015	SE / NO	11	34%	889 582	1 714 994	2 604 576
64	**Pourquoi j'ai pas mangé mon père**	2015	FR / IT / BE / CN	8	6%	160 750	2 409 636	2 570 386
53	**Babysitting 2**	2015	FR	10	8%	201 581	2 349 746	2 551 327
8	Youth	2015	IT / FR / GB / CH	23	61%	1 530 455	973 628	2 504 083
647	**Si accettano miracoli**	2015	IT	0	n/a	-	2 353 256	2 353 256

Source: LUMIERE

This short section on the actual consumption (admissions) of EU non-national films shows that the films that circulate the most are not necessarily those with the most admissions. Indeed, some of the films with the widest circulation were not hits at the box-office but stimulated interest (and found a distributor) by being nominated for - or having won - film festivals, being produced by several EU countries, or having been shot in English, a language which appears to make films travel better.

The difference between blockbuster hits, the films having generated most admissions, and the films with the widest circulation and/or most non-national admissions is telling. Whereas 12 100% nationally produced films are in the top 20 list for overall admissions (generated, for the majority of these films, on their national market), only six 100% nationally produced films are in the top list for non-national admissions and the same number of such is in the top list for films with the widest circulation.

After having gained a little more insight into what appears to make a film travel in cinemas intra-EU, the following sections highlight the main statistics on intra-EU film exports in cinemas, on TV and on TVOD.

2.2.2. EU non-national film exports in cinemas

Key Insights

- Volume: **EU non-national films accounted for** 31% of all films **on a first release in 2015 in EU cinemas (2 501 EU non-national film releases corresponding to 866 film titles).**
- Concentration: **EU non-national film exports are correlated to the level of film production of each country, with EU-5 countries representing** 74% **of all exports.**
- **French and British films make up the lion's share of EU non-national films in cinemas –** 51% **of all EU non-national film exports.**
- Circulation: **An individual EU film was exported to 2.9 EU countries on average - with significant disparities, however, depending on country of origin.**
- Reach: **Only films produced in EU-5 countries and Sweden were exported to all other 24 EU markets; on average the reach was 15 other countries.**

To identify exported EU non-national films in cinema, LUMIERE data on all first releases in 2015 in EU cinemas were used.

The sample does not include data on cinema markets in Croatia, Ireland and Malta; also, the data for Belgium is only partial (coverage of about 61% of film releases).

Table 6 provides an overview of the main information of the dataset.

The sample consists of 8 133 film releases, representing 2 284 single film titles (1 413 of them single EU film titles) in EU cinemas in 2015.

Out of the 1 413 EU single film titles, 866 were exported to at least one other EU country, meaning that 61% of all EU film titles released in 2015 circulated in at least one other EU country.

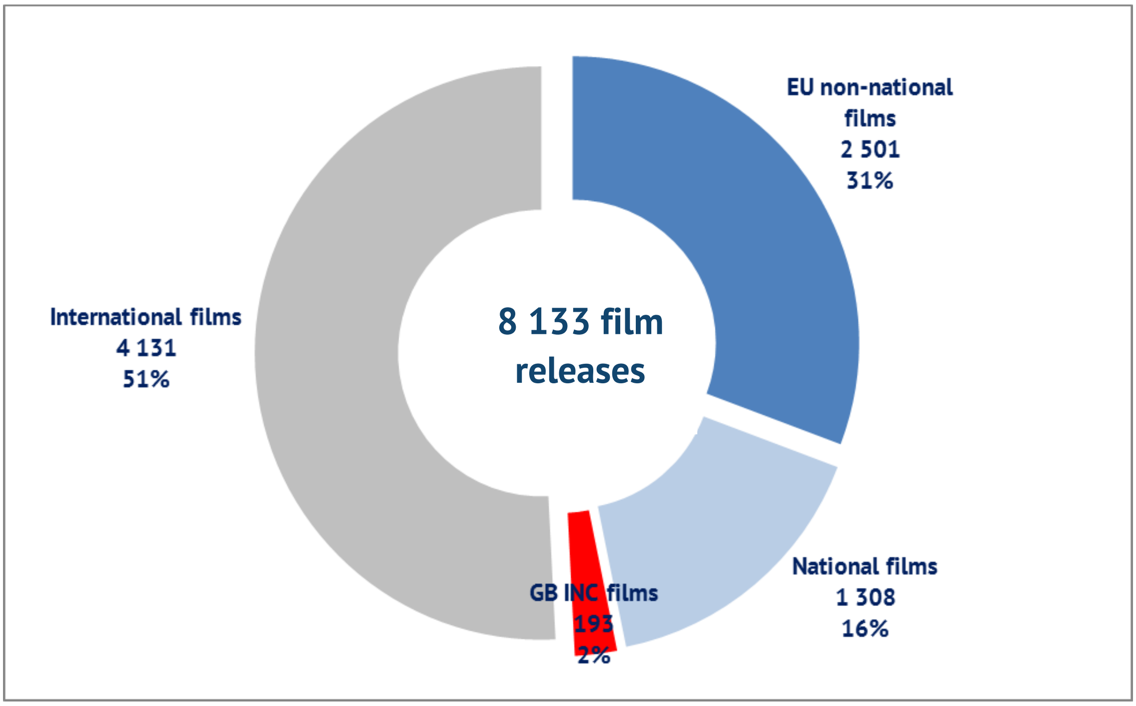
As can be seen in Figure 11, international films made up around half of all film releases, **EU non-national films 31% (or 2 501 EU film releases outside their home market)** and national films (1 308 films released in their national market) 16%.

Table 6. Cinema Sample information

Distribution	Cinema
Sample size	**8 133 film releases**
of which international films	*4 131 film releases*
of which national films	*1 308 film releases*
of which EU non-national films	*2 501 film releases*
of which GB Inc films	*193 film releases*
Year	2015
Details	1st releases only
Number of EU countries[10]	25
Single film titles (all COO)	**2 303**
of which EU film titles	1 413
of which EU non-national single film titles	*866*

Source: OBS on LUMIERE data

Figure 12. Cinema – Region of origin of 8 133 1st release films in EU cinemas 2015, in units and % of total



Source: LUMIERE

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[10] Not included are HR, IE and MT. Also, 2015 data for the Belgian cinema market is only partially comprehensive.

By volume, EU non-national film exports are correlated to the level of film production of each country, with EU-5 countries accounting for 74% of all EU non-national films.

Figure 12 shows the repartition of the 2 501 EU non-national film releases. French (909 film releases) and British (371 film releases) releases accounted for 51% of all EU non-national film exports, whereas film releases from 13 countries accounted for less than 1% for each (CZ, HU, PL, PT, RO, BG, EE, GR, SK, LT, LU, LV and SI).

The volume of film exports in fact reflects the volume of film production of country groups, as can be seen in Figure 1.

Figure 13 shows the average number of films exported to another EU country, another measure of film export volume, but maybe more easily represented than total volumes as in Figure 12. France for example exported 37.9 films on average to each of the other 24 EU countries of the data set in 2015.

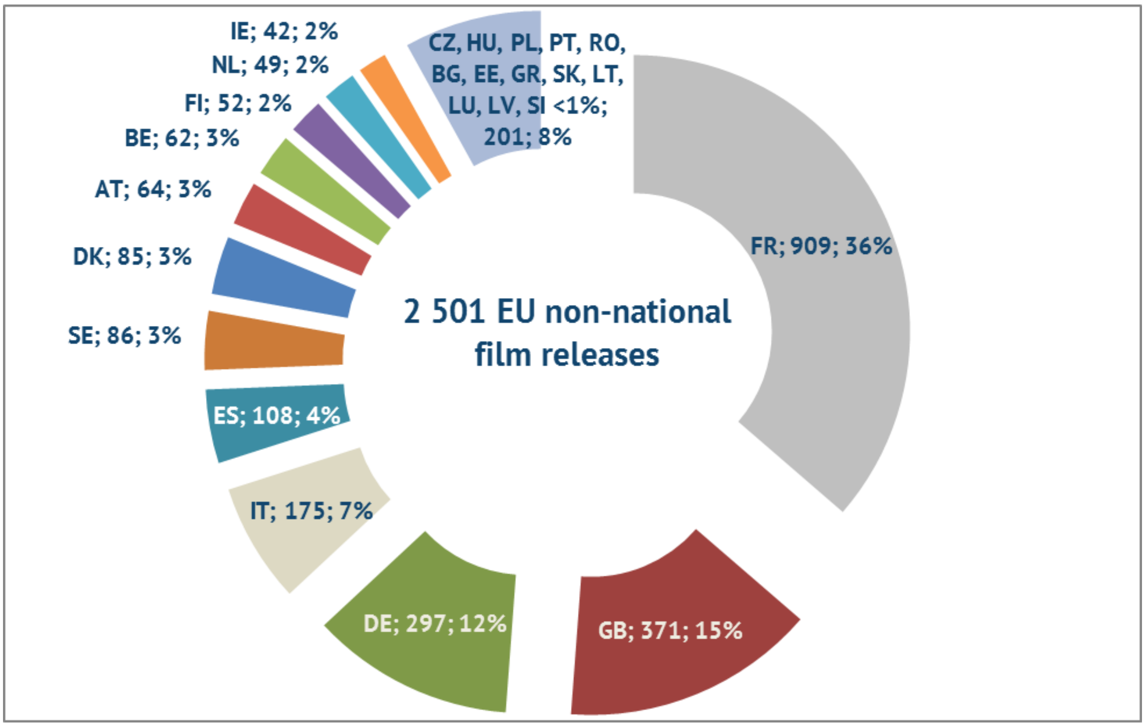
Of course, these are averages calculated by dividing the total volume of film exports by the number of non-national EU markets in the dataset - in the case of cinema 25-1=24.

EU-5 countries accounted for 74% of all exports of EU non-national films (film production volume 65%, see Figure 1), the following 10 countries for 21.5% (film production volume 25%) and the bottom 10 countries 4.5% (bottom 13 countries 10%).

However, Figure 12 and Figure 13 show only volume, one in totals of film exports, the other in average film exports to another EU country.

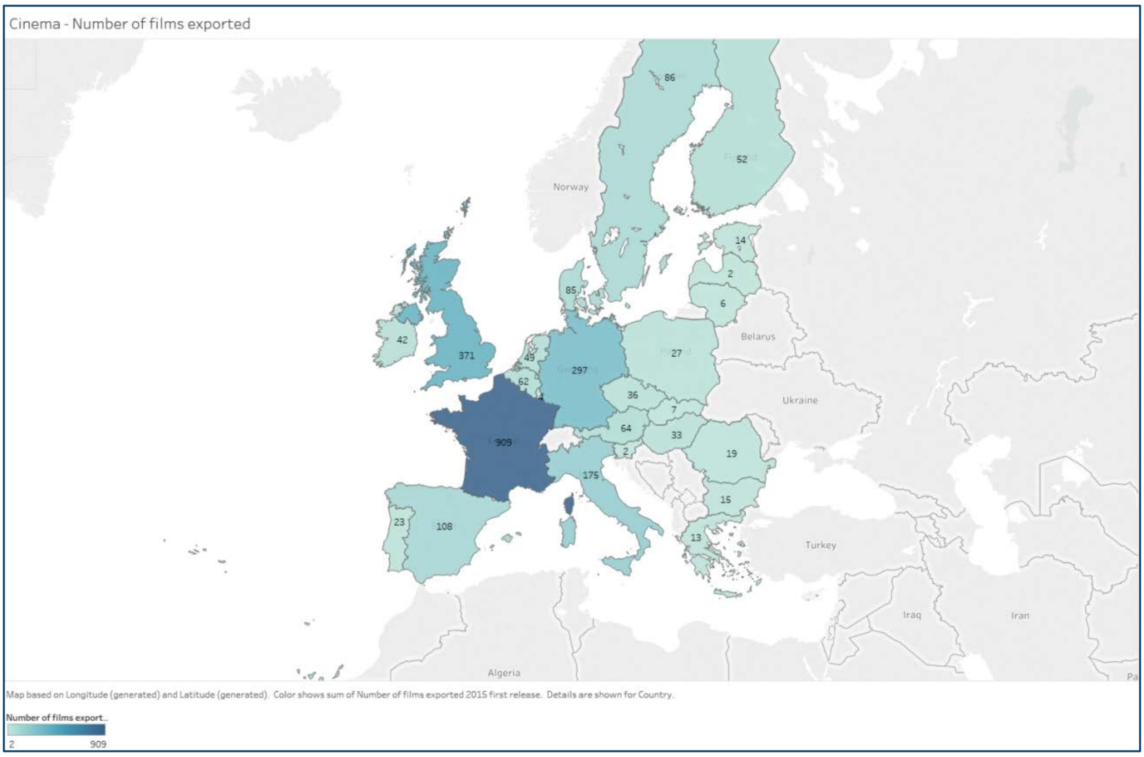
These figures demonstrate that countries with a big film production volume unsurprisingly also have a larger share of film exports. But what does this mean for single film title exports in 2015?

Figure 13. Cinema – Country of origin of 2 501 EU non-national film releases 2015, in units and % of total



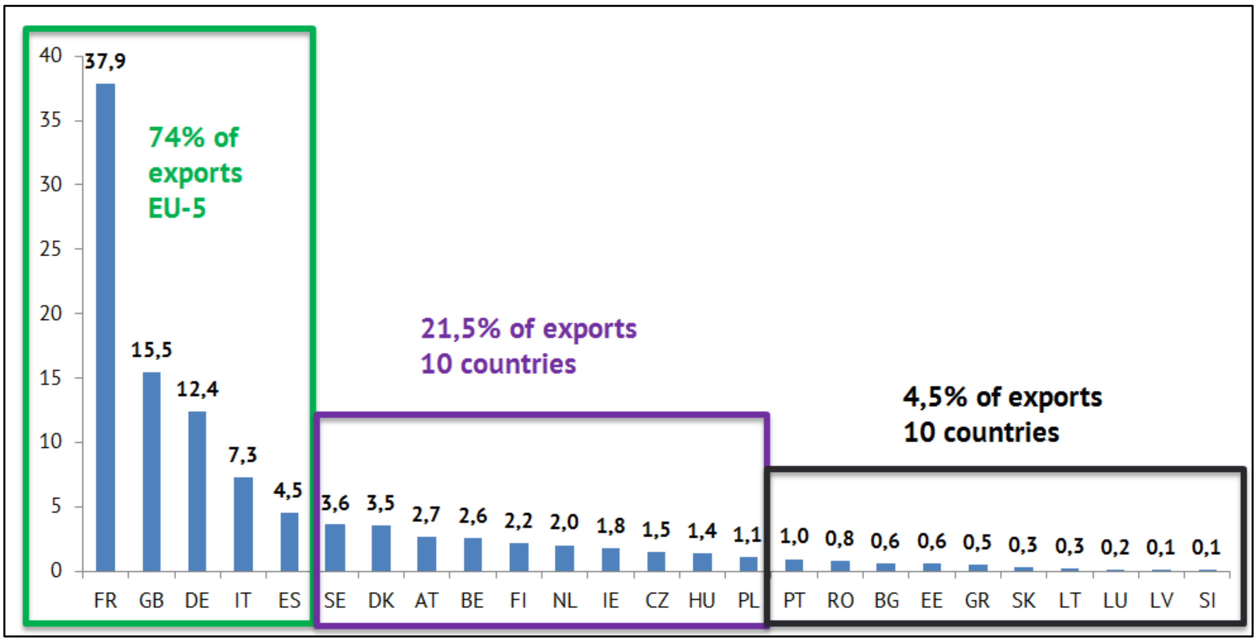
Source: LUMIERE

Map 6 Cinema – Country of origin of 2 501 EU non-national film releases 2015, in units



Map based on Longitude (generated) and Latitude (generated). Color shows sum of Number of films exported 2015 first release. Details are shown for Country.

Figure 14. Cinema – Average number of films exported to another EU country by country, in units



Source: OBS on LUMIERE data

EU-5 countries also accounted for 68% of all EU non-national single film titles, confirming the correlation with the volume of film production for exports.

The total volume of 2 501 EU non-national film releases corresponds to 866 EU non-national single film titles, films that were released in at least one EU non-national market (see Figure 14).

Here again, the repartition follows the production and export volume split; the EU-5 acccounted for 593 film titles or 68% of the total of EU non-national film titles on release in 2015, the following 10 countries accounted for 27% (226 single film titles) and the last 10 countries accounted for 5% (47 single film titles on release in a non-national EU market).

These findings lead us to conclude that EU non-national film exports are, at least to a certain point, correlated to the actual film production volume of a given country.

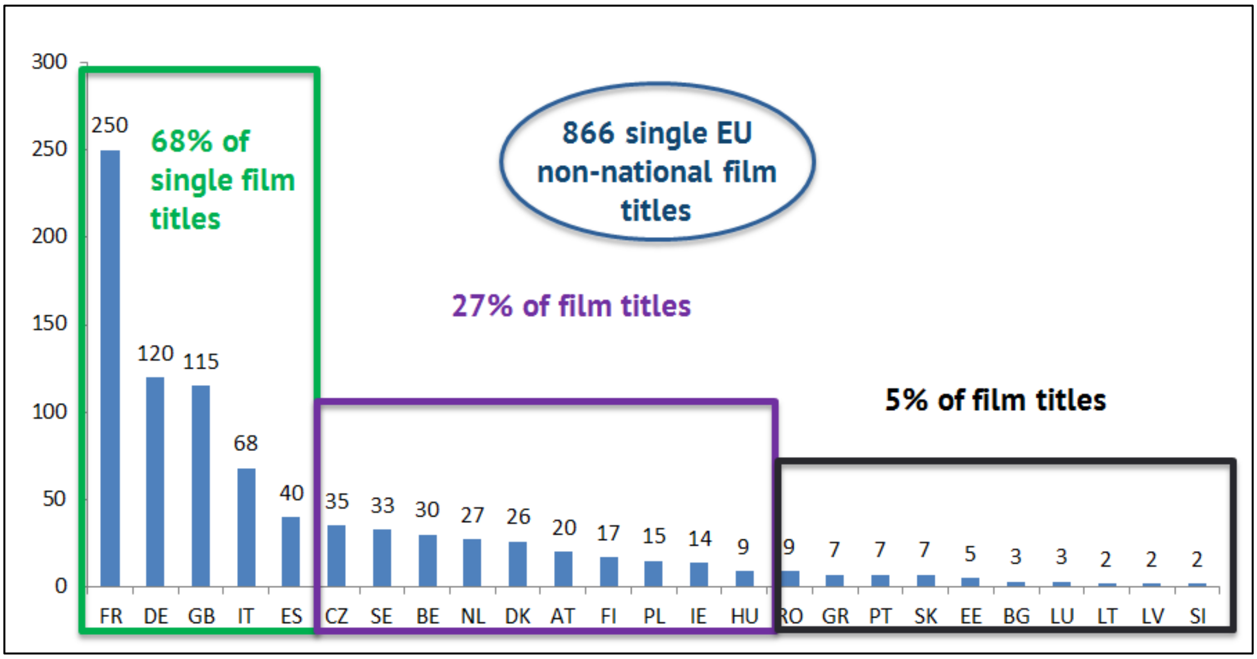
Finally, the volumes of film exports of each country and the number of single film titles these volumes represent, allows calculation of the average number of country exports (or film circulation) to another EU country for a single film title.

Here, the focus is not on all film titles of a given country on release but only those distributed in / exported to another EU country (see Figure 8).

Surprisingly, the disparities are less significant than in previous Figures, meaning that when a title is exported, it is exported to 2.9 EU countries (EU average).

The most extreme values (five countries for BG and one for LV, SI and SK, respectively) can be explained by the rather low export volume (only three titles for BG[11] and, respectively, two, two and seven single film titles for LV, SI and SK[12], on release in other EU countries in 2015).

Figure 15. Single film titles released in at least one other EU country in 2015 by country, in units



Source: LUMIERE

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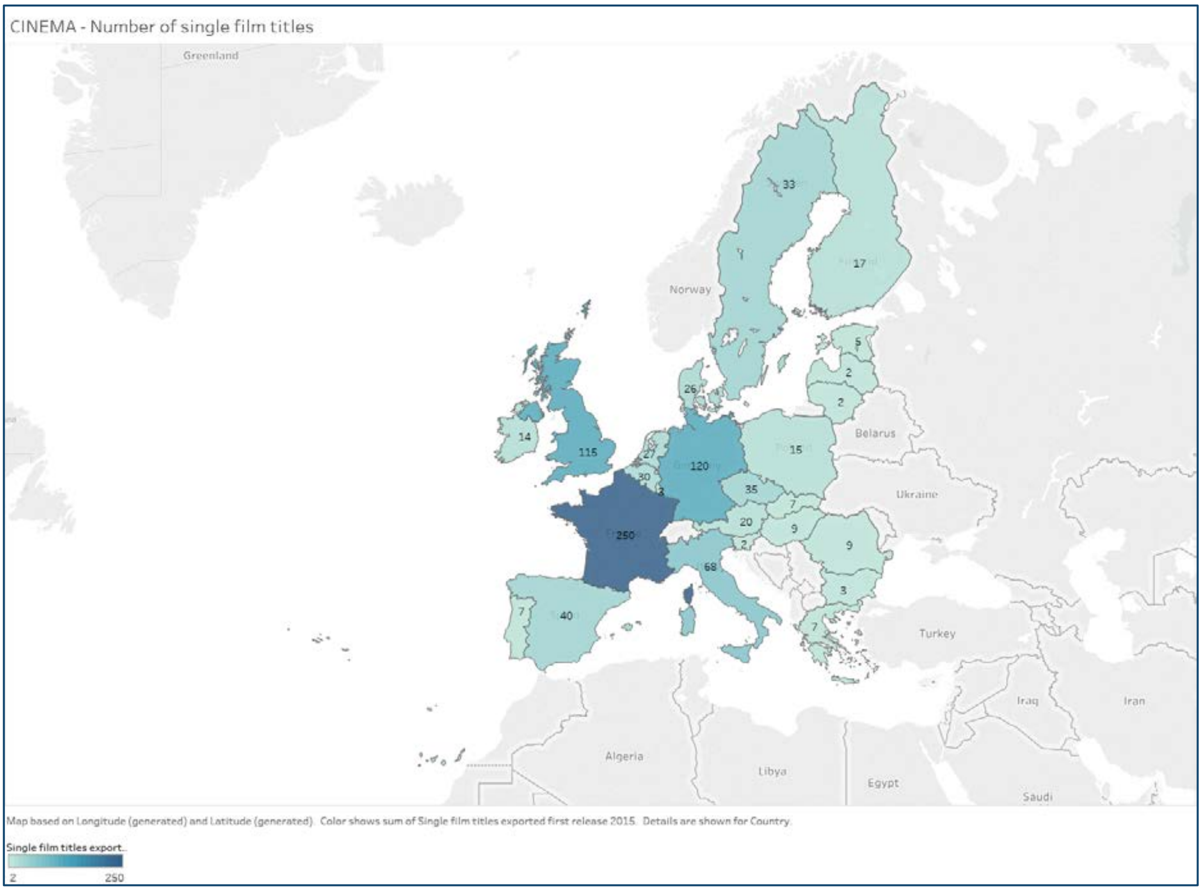
[11] The three films produced in BG: *Automata BG/ES 2014; Sadilisheto BG/DE/HR 2014; Urok BG/GR 2014*

[12] The two films produced in LV; *Hei Rasma ! Praam LV/ES 2015; Need, kes julgesid LV/ES 2015*

The two films produced in SI: *Inferno SI/HR/MK/CS 2014; Razredni sovraznik SI 2013*

Map 7 Single film titles released in at least one other EU country in 2015 by country, in units



Map based on Longitude (generated) and Latitude (generated). Color shows sum of Single film titles exported first release 2015. Details are shown for Country.

Circulation – On average, when a film was exported, it was exported to 2.9 countries, with significant disparaties, however, according to country of origin.

Reach - EU-5 and Swedish films were exported to all other 24 EU markets. On average, films produced in an EU country had a potential reach of 15 countries.

Also, whereas the biggest producers in volume, FR and GB, managed to export their films to more countries on average than the EU average (2.9 countries), with 3.6 and 3.2 countries, respectively, the other three countries with the highestvolume (DE, IT and ES) appeared to export their films to fewer countries than the EU average - 2.5, 2.6 and 2.7 countries, respectively (see Figure 15).

This could mean that whereas in terms of volume they were among the leaders for the export of EU non-national films, they may have rather limited markets for their films - due to language, cultural proximity / closeness, co-production partners or other factors.

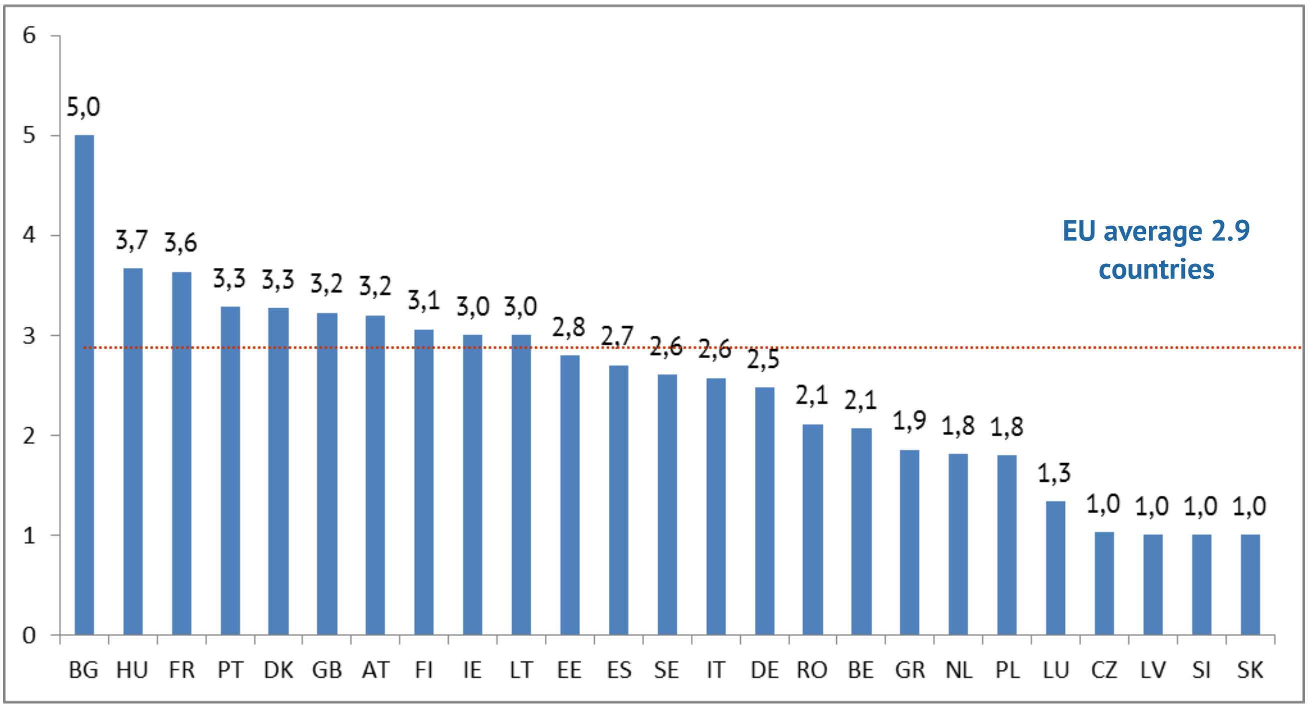
When another indicator is observed - the maximum number of countries in which at least one film[13] was released in cinemas by country of origin (in other words the reach for films of a given country, see Figure 16), major differences once again appear.

Whereas at least one film produced in the EU-5 and Sweden was released in every other EU cinema market (maxium of 24 release markets), Latvia for example managed to export to only one other EU country, namely Estonia.

Slovenian films were only released in France and Croatia, and Slovak films only in the Czech Republic, Germany and Poland.

This indicator is therefore an addition to the average circulation indicator, by giving the maximum "reach" for films produced in each country.

Figure 16. Average number of country exports for 1 film title (when film exported), in units



Source: OBS on LUMIERE data

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[13] Not necessarily the same film title – here, the question for each EU country is: in how many countries was at least one film produced by the EU country released in cinemas? In other words, what was the maximum reach for films produced in a given country?

Map 8 Average number of country exports for 1 film title (when film exported), in units

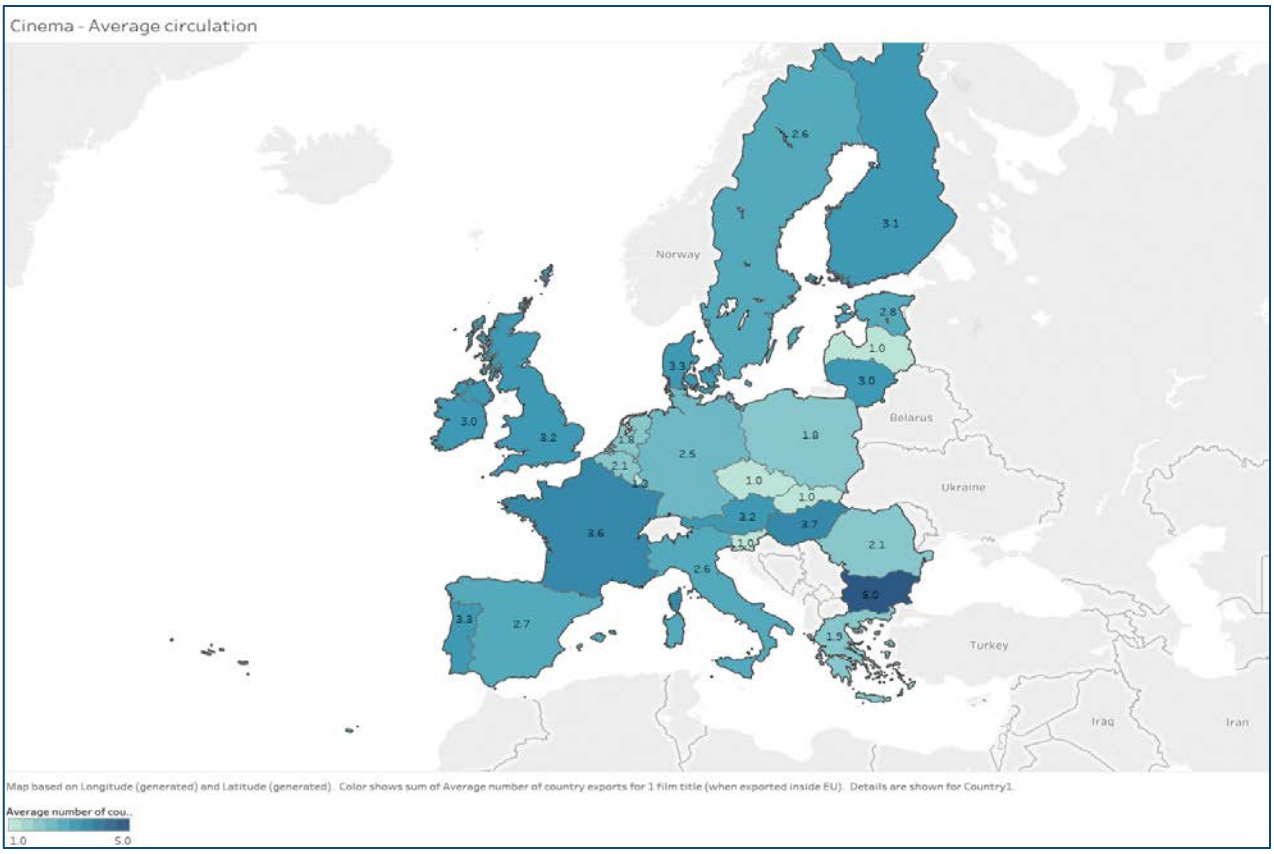
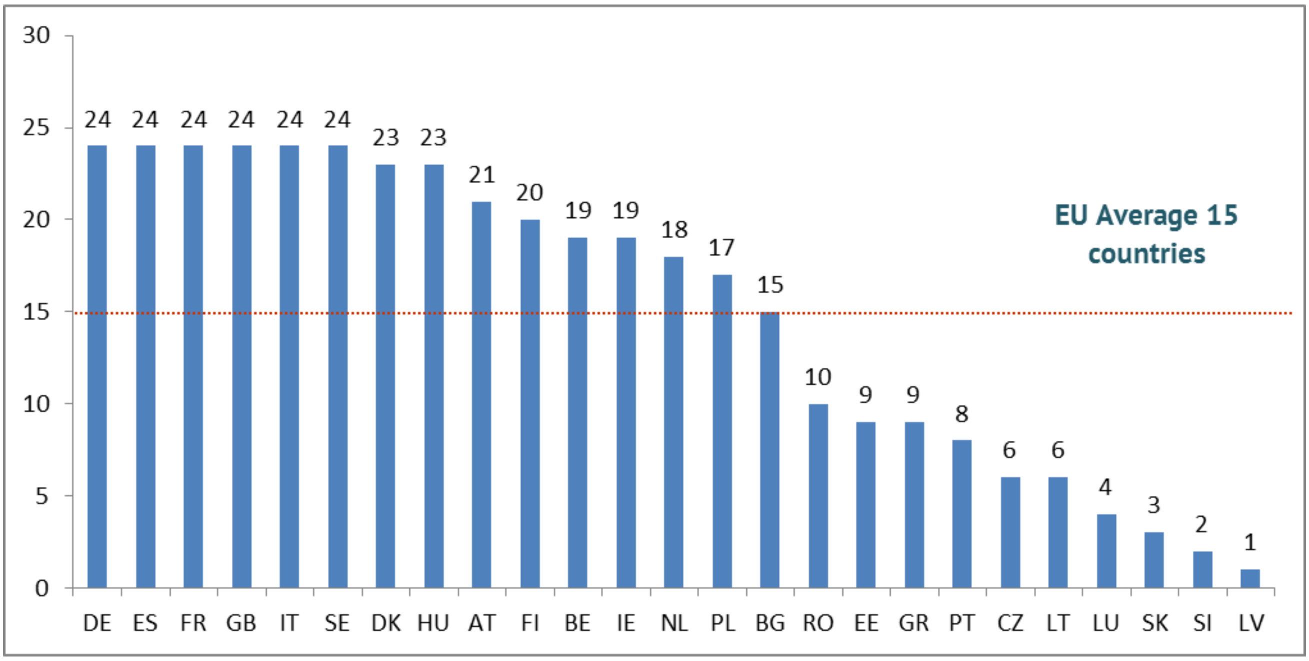
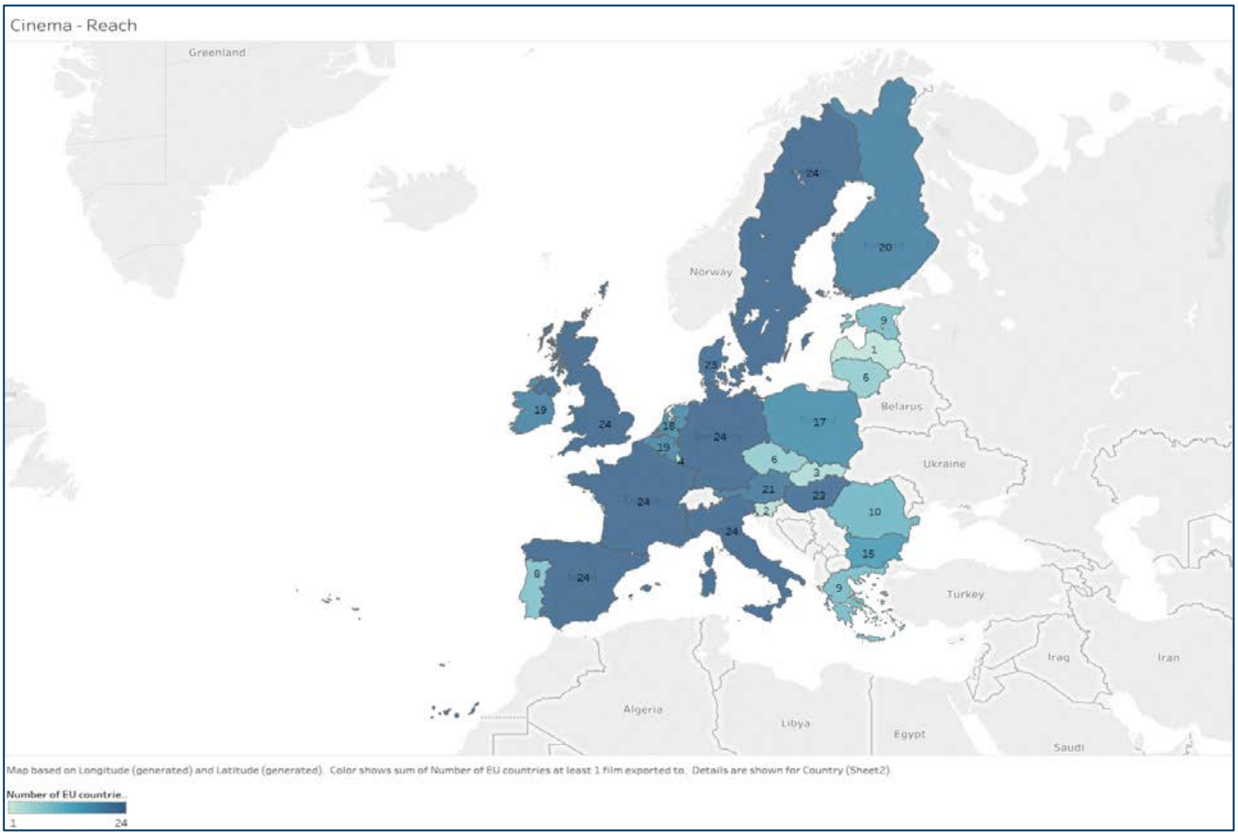


Figure 17. Number of EU countries to which at least 1 film exported by country, in number of countries *(Maximum 24 for countries)*



Source: OBS on LUMIERE data

Map 9 **Number of EU countries to which at least 1 film exported by country, in number of countries**



> The impact of cultural proximity and language: A shared language and cultural proximity favour the export of films.

The export matrices Matrix 1 and Matrix 2 show the flows of exports from one country to another. In columns are listed all export countries; the rows list the import markets. Highlighted in red are the top export markets for each country. So, starting with AT in the columns, DE from among the rows was it's biggest export market with 16% of total Austrian film exports of 64 films in 2015. Thus, 10 films were exported to DE.

These matrices allow for a closer observation of exchange flows and therefore also to appraise the impact of a shared language or cultural proximity on the exchange of films.

Looking closer, one can observe that whereas French and British films were exported to almost all EU markets in equal percentages of their total exports[14], German

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[14] Belgium was the main export market for French films, with 9% of all exports or 85 film titles, and France the main market for British films with 11% of all exports or 39 films

films' main export market was Austria[15]. The same was true for Austrian films for which Germany represented 16% of all film exports (10 film titles).

For Italian and Spanish films the major export market was France; 20% of all film exports, or 35 film titles, for Italian films, and 10% of all exports for Spanish films, or 38 film titles.

The matrix allows identification of the main export markets for films of each country and therefore the main exchange flows.

Another example of the impact of language and cultural proximity is the export of Belgian films. Their main export markets were the Netherlands (26% of all film exports, or 16 film titles) and France (15% of all exports, or nine films), i.e. countries that may be considered to share a language and enjoy a degree of cultural proximity.

Another example of cultural proximity are the exchanges between the Czech and Slovak Republics; the Czech and Slovak Republics are, respectively, the main export markets for each others' films (with 64% of all Czech film exports going to SK and 71% of all SK film exports going to CZ)[16].

Language and cultural proximity have an impact on the level of exchanges between countries; countries that share the same language and / or characterised by cultural proximity are important export markets for each others' films.

The focus in this section is not yet on film imports but it may be observed that France represented one of the main export markets for several EU countries (such as AT, BE, CZ, DE, EE, ES, GB, HU, IT, PT, RO and SE), which could be an indicator of the importance of the theatrical exhibition market in France, the country with the highest admissions in Europe (205.29 million in 2015, or 21% of all EU admissions) and the highest number of cinema screens.

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[15] Austria represented 21% of all German film exports, or 61 films

Table 7. Summary of main indicators for EU non-national film exports by EU country, in units

Country	Number of films exported 2015, first release	Average number of films exported to another EU country *(24 EU non-national cinema markets)*	Single film titles exported 2015, first release	Average number of country exports for 1 film title *(when exported inside EU)*	Number of EU countries to which at least 1 film exported (max 24)
AT	64	2,7	20	3,2	21
BE	62	2,6	30	2,1	19
BG	15	0,6	3	5,0	15
CY	n/a	n/a	n/a	n/a	n/a
CZ	36	1,5	35	1,0	6
DE	297	12,4	120	2,5	24
DK	85	3,5	26	3,3	23
EE	14	0,6	5	2,8	9
ES	108	4,5	40	2,7	24
FI	52	2,2	17	3,1	20
FR	909	37,9	250	3,6	24
GB	371	15,5	115	3,2	24
GR	13	0,5	7	1,9	9
HR	n/a	n/a	n/a	n/a	n/a
HU	33	1,4	9	3,7	23
IE	42	1,8	14	3,0	19
IT	175	7,3	68	2,6	24
LT	6	0,3	2	3,0	6
LU	4	0,2	3	1,3	4
LV	2	0,1	2	1,0	1
MT	n/a	n/a	n/a	n/a	n/a
NL	49	2,0	27	1,8	18
PL	27	1,1	15	1,8	17
PT	23	1,0	7	3,3	8
RO	19	0,8	9	2,1	10
SE	86	3,6	33	2,6	24
SI	2	0,1	2	1,0	2
SK	7	0,3	7	1,0	3
EU TOTAL	**2 501**	n/a	**866**	**2,9**	n/a

Source: OBS on LUMIERE data

Matrix 1 Cinema - Export matrix 2015, in % of total exports for each country and units for total exports

COUNTRY OF IMPORT	COUNTRY OF EXPORT																								
	AT	BE	BG	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HU	IE	IT	LT	LU	LV	NL	PL	PT	RO	SE	SI	SK
AT		3%			21%	5%		5%	6%	4%	4%	8%	3%	2%	5%				2%	4%	13%		3%		
BE	3%				2%	2%		3%	4%	9%	3%		3%	5%	3%		25%		16%		13%		2%		
BG	2%	3%		3%	3%	4%	14%	6%	4%	2%	2%		3%	2%	2%					4%		16%	6%		
CZ	6%	2%			4%	2%		2%	6%	4%	5%		6%	2%	2%				2%	4%		16%	3%		71%
DE	16%	8%	7%			9%		6%	10%	5%	7%	31%	6%	5%	6%	17%	25%		16%	26%	4%		6%		14%
DK	5%	2%			2%		14%	2%		3%	4%	8%	3%	2%	2%	17%			2%	7%			5%		
EE	5%	2%	7%		2%	5%		1%	12%	3%	4%		3%		3%			100%	8%		13%		2%		
ES		6%	7%		5%	7%	7%			4%	4%		3%	7%	5%	17%			4%	7%			3%		
FI					2%	2%	14%	3%		2%	2%		3%		1%				2%	4%			7%		
FR	9%	15%	7%	25%	8%	7%	14%	10%	6%		11%	8%	6%	5%	20%	17%	25%		6%		22%	16%	8%	50%	
GB	6%	5%	7%		4%	7%	14%	6%	6%	6%		8%	9%	31%	6%				4%	7%	9%	5%	6%		
GR	3%		7%		2%	1%		6%		5%	4%		3%		5%								2%		
HR	5%	3%	7%		4%	5%		5%	4%	3%	2%		3%	2%	3%					4%		5%	2%	50%	
HU	6%	2%	7%		4%	6%		5%		5%	5%			5%	4%		25%		6%	4%		11%	5%		
IE																									
IT	3%	3%	7%		6%	5%		6%	2%	5%	6%	8%	6%	5%					6%	7%			5%		
LT		3%	7%		4%		7%	2%	4%	2%	4%				1%				2%				2%		
LU	2%				1%	1%		2%	2%	7%	2%		3%	5%	2%						13%		2%		
LV	2%		7%		1%	2%		1%	6%	2%	3%		3%		2%				2%				1%		
NL	6%	26%	7%	3%	5%	8%		6%	4%	6%	6%	15%	3%	7%	5%	17%				4%			3%		
PL	3%	3%	7%	3%	5%	8%		7%	8%	5%	5%	8%	12%	2%	4%				12%			11%	9%		14%
PT	8%	2%	7%		4%	1%	7%	6%	6%	6%	7%		3%	2%	6%				4%	4%			3%		
RO	2%	3%			2%	4%		2%	2%	4%	2%		3%		2%				2%	4%			3%		
SE	3%				3%	2%	7%	3%	4%	3%	4%		3%	5%	2%					4%		5%			
SI	2%	6%	7%	3%	3%	2%		5%	4%	3%	2%	8%	3%	2%	5%	17%			2%	4%	13%	11%	5%		
SK	5%	3%		64%	3%	4%		3%	4%	3%	3%		6%	2%	3%					4%		5%	3%		
Total Exports	**64**	**62**	**15**	**36**	**297**	**85**	**14**	**108**	**52**	**909**	**371**	**13**	**33**	**42**	**175**	**6**	**4**	**2**	**49**	**27**	**23**	**19**	**86**	**2**	**7**
corresponding to Single Film titles exported	***20***	***30***	***3***	***35***	***120***	***26***	***5***	***40***	***17***	***250***	***115***	***7***	***9***	***14***	***68***	***2***	***3***	***2***	***27***	***15***	***7***	***9***	***33***	***2***	***7***

Source: OBS on LUMIERE data

Matrix 2 Cinema - Export matrix 2015, in units

COUNTRY OF IMPORT	COUNTRY OF EXPORT																								
	AT	BE	BG	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HU	IE	IT	LT	LU	LV	NL	PL	PT	RO	SE	SI	SK
AT		2			61	4		5	3	38	15	1	1	1	9				1	1	3		3		
BE	2				6	2		3	2	85	11		1	2	6		1		8		3		2		
BG	1	2		1	10	3	2	6	2	20	6		1	1	4					1		3	5		
CZ	4	1			11	2		2	3	32	17		2	1	4				1	1		3	3		5
DE	10	5	1			8		6	5	45	27	4	2	2	11	1	1		8	7	1		5		1
DK	3	1			6		2	2		27	16	1	1	1	4	1			1	2			4		
EE	3	1	1		5	4		1	6	28	13		1		5			2	4		3		2		
ES		4	1		16	6	1			38	16		1	3	9	1			2	2			3		
FI					7	2	2	3		14	7		1		2				1	1			6		
FR	6	9	1	9	23	6	2	11	3		39	1	2	2	35	1	1		3		5	3	7	1	
GB	4	3	1		13	6	2	6	3	54		1	3	13	10				2	2	2	1	5		
GR	2		1		7	1		6		42	14		1		8								2		
HR	3	2	1		11	4		5	2	24	9		1	1	5					1		1	2	1	
HU	4	1	1		12	5		5		46	19			2	7		1		3	1		2	4		
IE																									
IT	2	2	1		17	4		7	1	42	24	1	2	2					3	2			4		
LT		2	1		11		1	2	2	20	13				1				1				2		
LU	1				4	1		2	1	60	8		1	2	3						3		2		
LV	1		1		4	2		1	3	18	10		1		4				1				1		
NL	4	16	1	1	14	7		7	2	58	24	2	1	3	9	1				1			3		
PL	2	2	1	1	15	7		8	4	44	17	1	4	1	7				6			2	8		1
PT	5	1	1		13	1	1	7	3	58	26		1	1	11				2	1			3		
RO	1	2			6	3		2	1	34	7		1		3				1	1			3		
SE	2				8	2	1	3	2	28	13		1	2	3					1		1			
SI	1	4	1	1	8	2		5	2	25	9	1	1	1	9	1			1	1	3	2	4		
SK	3	2		23	9	3		3	2	29	11		2	1	6					1		1	3		
Total Exports	**64**	**62**	**15**	**36**	**297**	**85**	**14**	**108**	**52**	**909**	**371**	**13**	**33**	**42**	**175**	**6**	**4**	**2**	**49**	**27**	**23**	**19**	**86**	**2**	**7**
corresponding to Single Film titles exported	***20***	***30***	***3***	***35***	***120***	***26***	***5***	***40***	***17***	***250***	***115***	***7***	***9***	***14***	***68***	***2***	***3***	***2***	***27***	***15***	***7***	***9***	***33***	***2***	***7***

Source: OBS on LUMIERE data

2.2.3. EU non-national film exports on TV

Key Insights

- Volume: **EU non-national films accounted for** 15% of all films **broadcasted on 131 EU TV channels in 18 EU countries (5 058 EU non-national film broadcasts corresponding to 2 864 film titles).**
- Concentration: **EU non-national film exports were correlated to the level of film production of each country, with EU-5 countries representing** 88% **of all exports.**
- **French and British films made up the lion's share of EU non-national films in cinemas –** 65% **of all EU non-national film exports.**
- Circulation: **When an EU film was exported, it was exported to** 1.8 EU countries **on average - with large disparities, however, depending on the country of origin.**
- Reach: **Only films produced in the EU-5, Demark and Ireland were exported to all other 17 EU markets; on average the reach wa** nine other countries**.**

The data set for films broadcasted on TV is comprised of 18 EU TV markets and a selection of 131 TV channels in these countries.

The time period examined was the TV season September 2015 to June 2016, in which 34 046 films were broadcasted.

Of these broadcasts, 24 417 were international films, 5 058 EU non-national films and 4 571 national films.

This corresponds to 15 317 single film titles, of which 7 082 were of EU origin (46.2% of all films broadcasted). Of these film titles of EU origin, 2 864 were EU non-national film titles (18,7%), and 4 218 were national film titles (27.5%).

As we do not have at our disposal actual audience data for TV film consumption (as in the case of TVOD transactions), this section only deals with the export of films and film titles. Table 8 provides an overview of the dataset used for this section.

Table 8. TV sample information

Distribution	**TV**
Sample size	34 046 film broadcasts
Of which International films	*24 417 broadcasts*
Of which EU non-national films	*5 058 broadcasts*
Of which national films	*4 571 broadcasts*
Year	Sep. 2015 - June 2016
Details	Unique broadcasts (no repeats)
Number of EU countries[17]	18
Single film titles (all COO)	**15 317 film titles**
Of which EU single film titles	*7 082 film titles*
Of which EU non-national single film titles	*2 864 film titles*

Source: OBS on EurodataTV

In Figure 17, the regions of origin of all film broadcasts (excluding repeats) are split up. The lion's share of films broadcasted on EU TV channels were films produced outside the EU, with 72% of all films broadcasted on TV (24 417 international film broadcasts, with US film broadcasts alone amounting to 22 702 broadcasts, or 66.7% of all films broadcasted on the selected TV channels in the time period).

EU films made up 28% of all films broadcasted, with an almost equal repartition between EU non-national film broadcasts and national film broadcasts: 5 058 (15% of total) and 4 571 (13%) film broadcasts, respectively.

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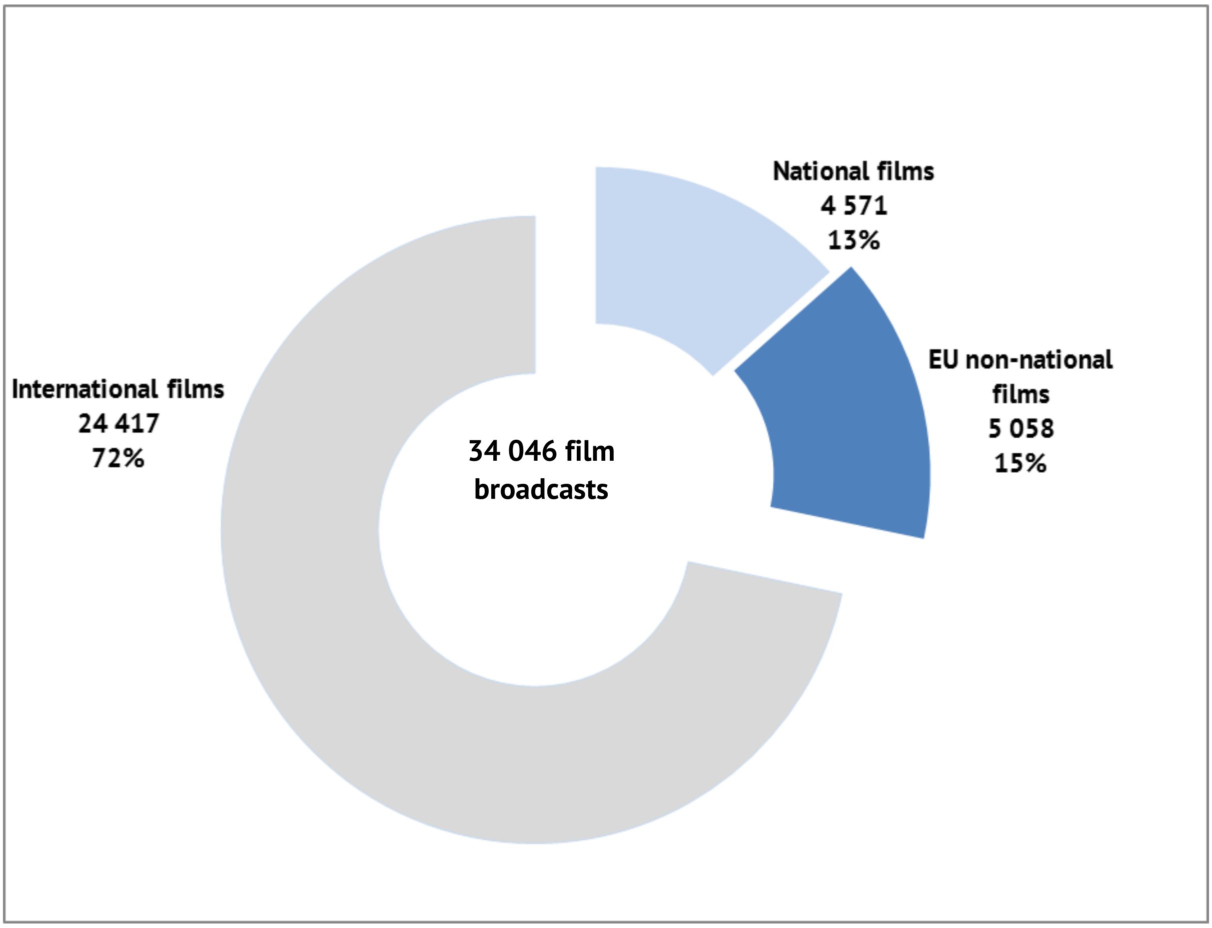
[17] TV markets included are AT, BE, CZ, DE, DK, ES, FI, FR, GB, HR, HU, IE, IT, NL, PL, RO, SI and SE. Therefore, reflection on the export of EU films is only valid for these national markets.

Figure 18. TV – Region of origin of 34 046 film broadcasts on 131 EU TV channels in 18 EU Member States:September 2015 to June 2016, in units and % of total



Source: OBS on EurodataTV

As for films in cinemas, EU non-national film exports were correlated to the level of film production of each country, with the EU-5 accounting for 88% of all EU non-national films.

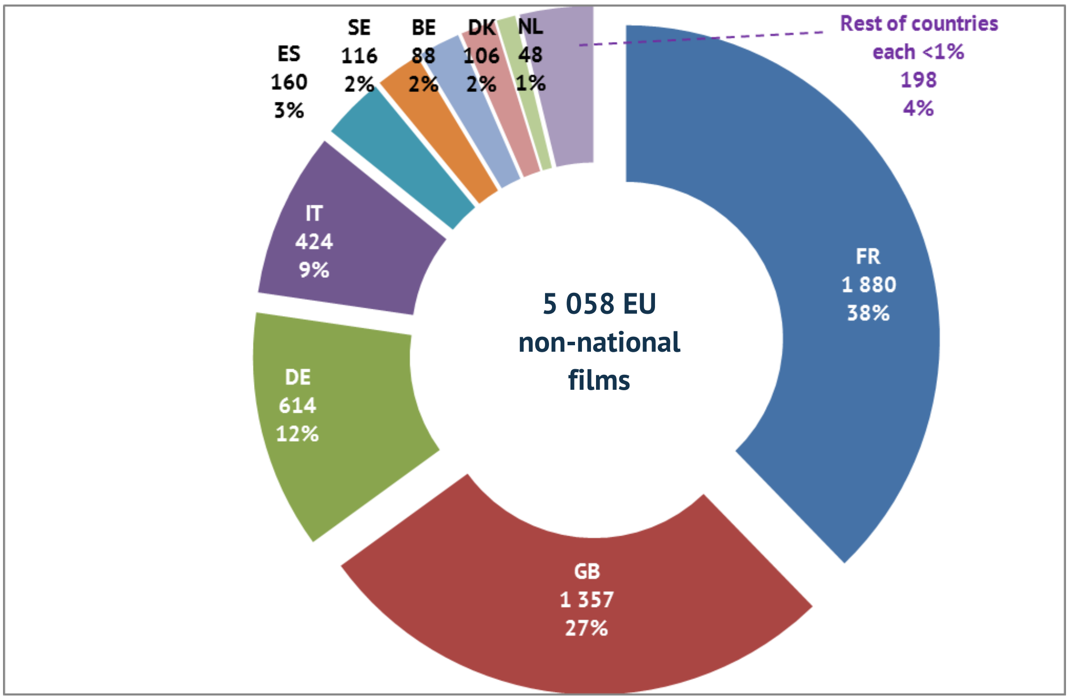
Figure 18 provides the country of origin split for the 5 058 EU non-national film broadcasts. As earlier in this analysis for cinema, more than half of film broadcasts of EU non-national films were of either French or British origin (65%), with the other three EU-5 countries making up 24%.

Films with an origin in EU-5 countries therefore accounted for almost nine out of 10 (88%) broadcasts of EU non-national films, and once again the leading film-producing countries in the EU made up the lion’s share of EU non-national film exports.

Here again, the volume of production (and by inference the volume of investments in films) had a determining influence on the volume of film exports. After the EU-5, the The next 10 countries accounted for the rest of the volume of exports (11%), and the bottom 11 countries contributed less than 1% of EU non-national film broadcasts on TV.

The balance towards films produced in EU-5 countries was even more pronounced than for cinema film exports, and this also represents the value chain of film exploitation; after having been distributed in cinemas, films are then broadcasted on TV (and sold through physical and digital formats). As EU-5-produced films dominated EU non-national films in cinema exhibition, and as our sample of TV channels is composed of pay TV, commercial and public free-to-air TV channels, this continuation of the film exploitation value chain comes as no surprise and explains the large share of EU-5 produced films.

Figure 19. TV – Country of origin of 5 048 EU non-national film broadcasts 2015/2016, in units and % of total



[18]*Source: OBS on EurodataTV*

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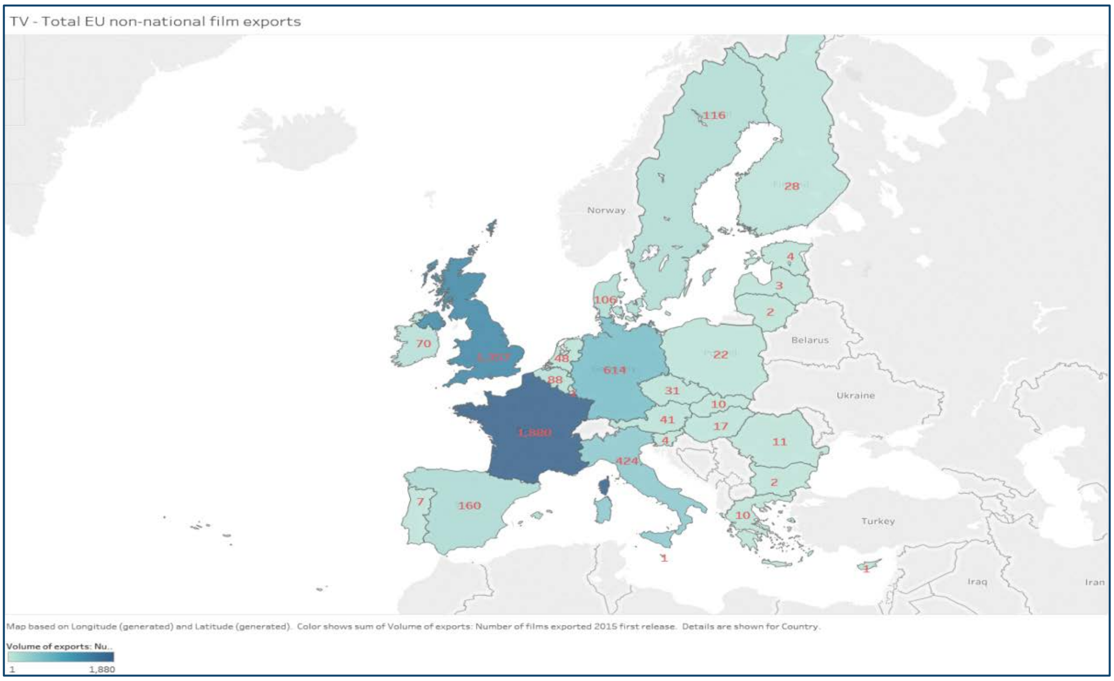
[18] Rest of countries : AT 41 films, CZ 31, FI 28, PL 22, HU 17, RO 11, SK 10, GR 10, PT 7, EE 4, SI 4, LV 3, BG 2, LT 2, CY 1, LU 1, MT 1

Map 10 TV - Country of origin of 5 048 EU non-national film broadcasts 2015/2016,



Map based on Longitude (generated) and Latitude (generated). Color shows sum of Volume of exports: Number of films exported 2015 first release. Details are shown for Country.

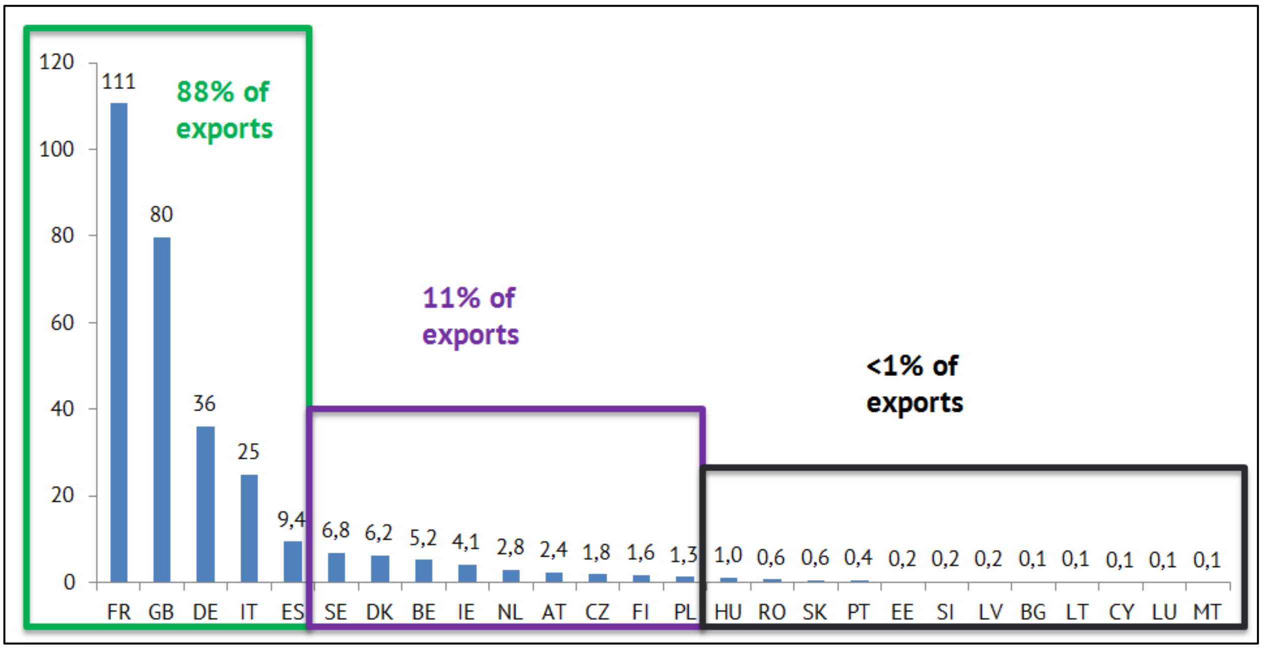
To finish with volume of exports, the same figures as for cinema are represented in Figure 19, namely the average number of film title exports of each EU country to another EU country.

The figures represented mean that for example France exported on average 111 films to each of the 17 EU countries of the dataset, and the United Kingdom 80 films. On the other hand, Hungary managed to export on average one film to each of the other 17 EU countries, while the following countries did not manage, on average, to export even one film to another EU country (meaning the export market for their films on TV was rather limited).

Another observation that can be drawn from these figures is that when it comes to films on TV, channels rely mostly on the leading producer countries for film imports.

The section on the import of films for TV broadcasts shows the importance of national production with regard to TV, which helps explain why their repartition was rather unequal in proportion to to their production volume share. Smaller film volume-producing countries tended to import their “diet” of EU films from higher volume-producing countries - in the case of TV. mainly France and the United Kingdom.

Figure 20. TV – Average number of films exported to another EU country by country, in units



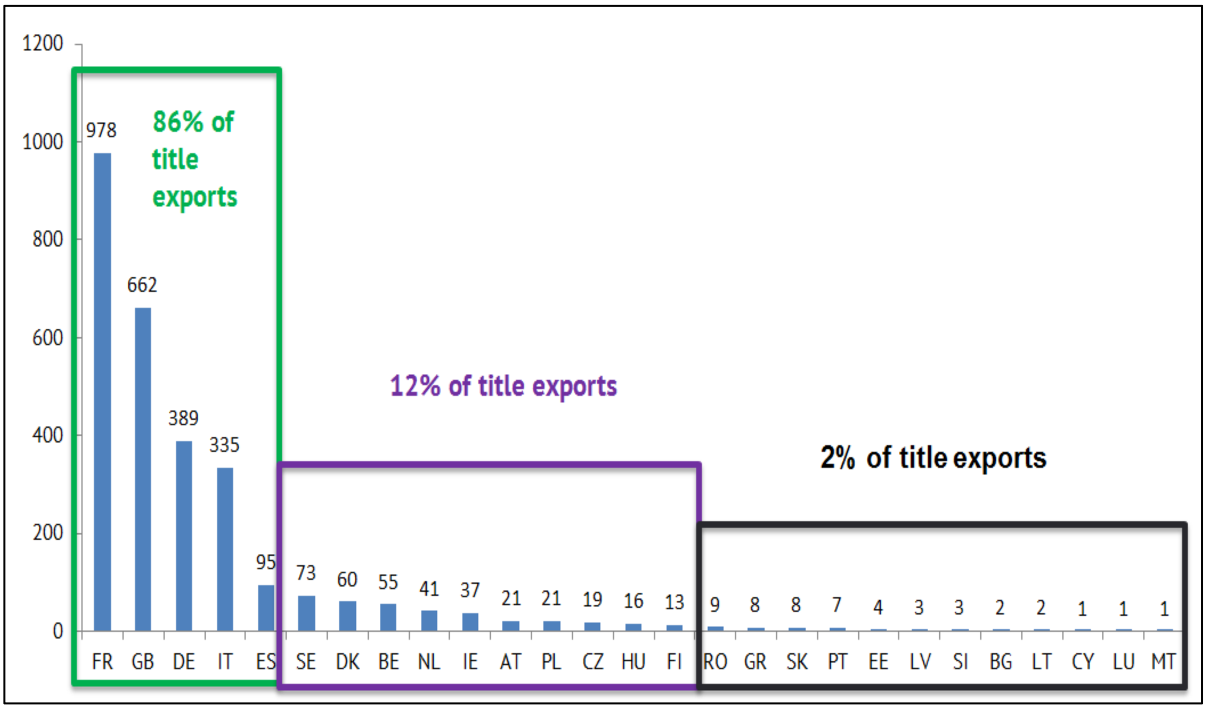
Source: OBS on EurodataTV

EU-5 countries also accounted for 86% of all EU non-national single film titles of broadcasted on TV, confirming once again the correlation with the production volume for EU non-national exports.

In addition to export colume, another interesting statistic is the number of single film titles exported. Figure 20 provides details for each country on the number of single film titles broadcasted in at least one other EU country.

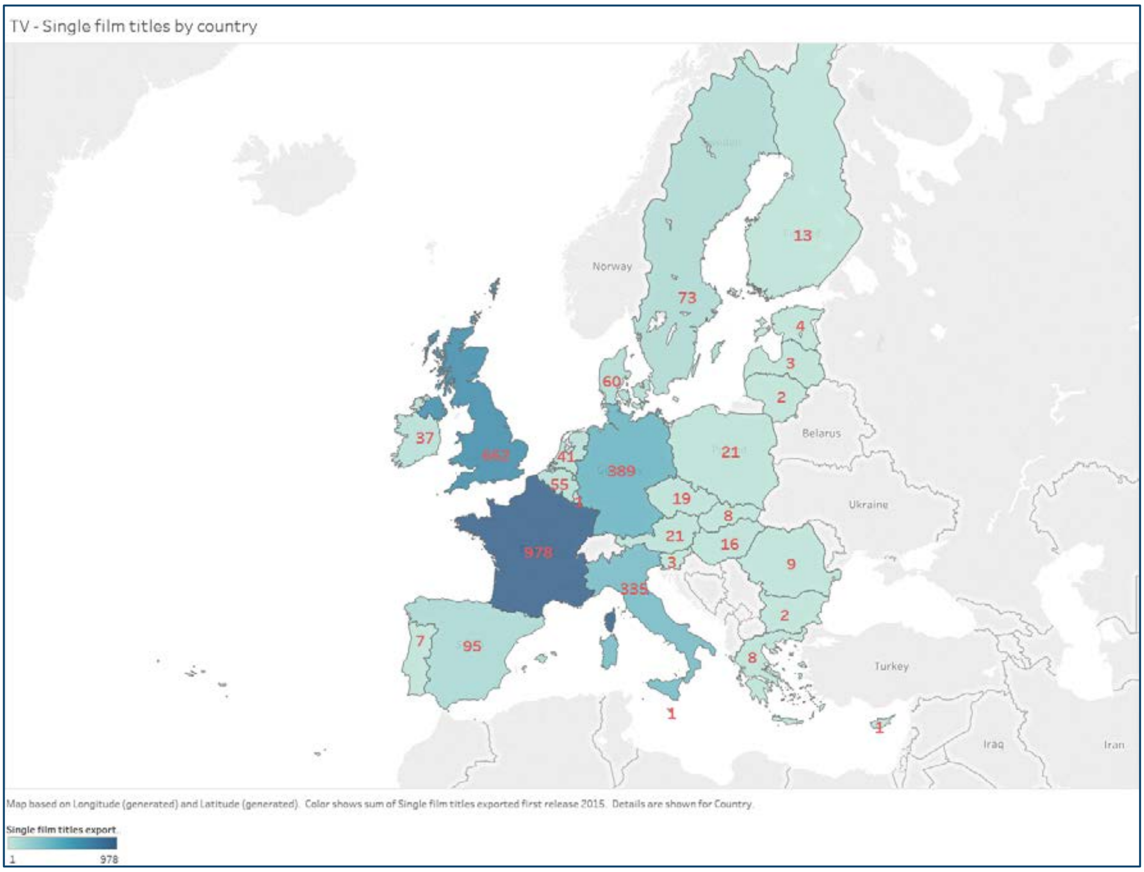
Even when the number of single film titles exported is considered, the same proportions for the export of EU non-national productions as for volume are apparent: EU-5 countries accounted for 86% of single film title exports, with France alone totalling 34% of all EU non-national film titles broadcasted on TV, and British-produced film titles accounting for 23%.

Figure 21. Single film titles broadcasted in at least one other EU country by country, in units



Source: OBS on EurodataTV

Map 11 Single film titles broadcasted in at least one other EU country by country, in units


TV - Single film titles by country

Map based on Longitude (generated) and Latitude (generated). Color shows sum of Single film titles exported first release 2015. Details are shown for Country.

Only films from the United Kingdom, France, Finland, Austria and Ireland circulated on average in more countries than the EU average of 1.8.

Films circulate less, on average, on TV than in cinemas with an EU average of 1.8 countries for TV and 2.9 countries for cinemas

This means also that on average French film titles were exported to 1.9 EU countries when exported and British films, when exported, to two. Average EU circulation for a single film title was 1.8 countries; however, if FR and GB are taken out of the equation, average circulation falls to 1.5 countries.

One additional remark is that films circulated in fewer countries on average when they were exported on TV rather than in cinemas (EU average of 2.9 countries in cinemas, versus 1.8 countries on TV, a difference of more than one country).

One reason for this lower circulation of films on TV could be a greater reliance on national films for TV broadcasts combined with a much larger offering of EU non-national film titles broadcasted on TV.

This is not surprising, as the “catalogue” of EU films available to broadcasters per year is many times larger than that for films released in cinemas per year.

Films produced in nine EU countries did not circulate on average beyond one country, showing a limited export potential, at least on TV, for films originating in these countries.

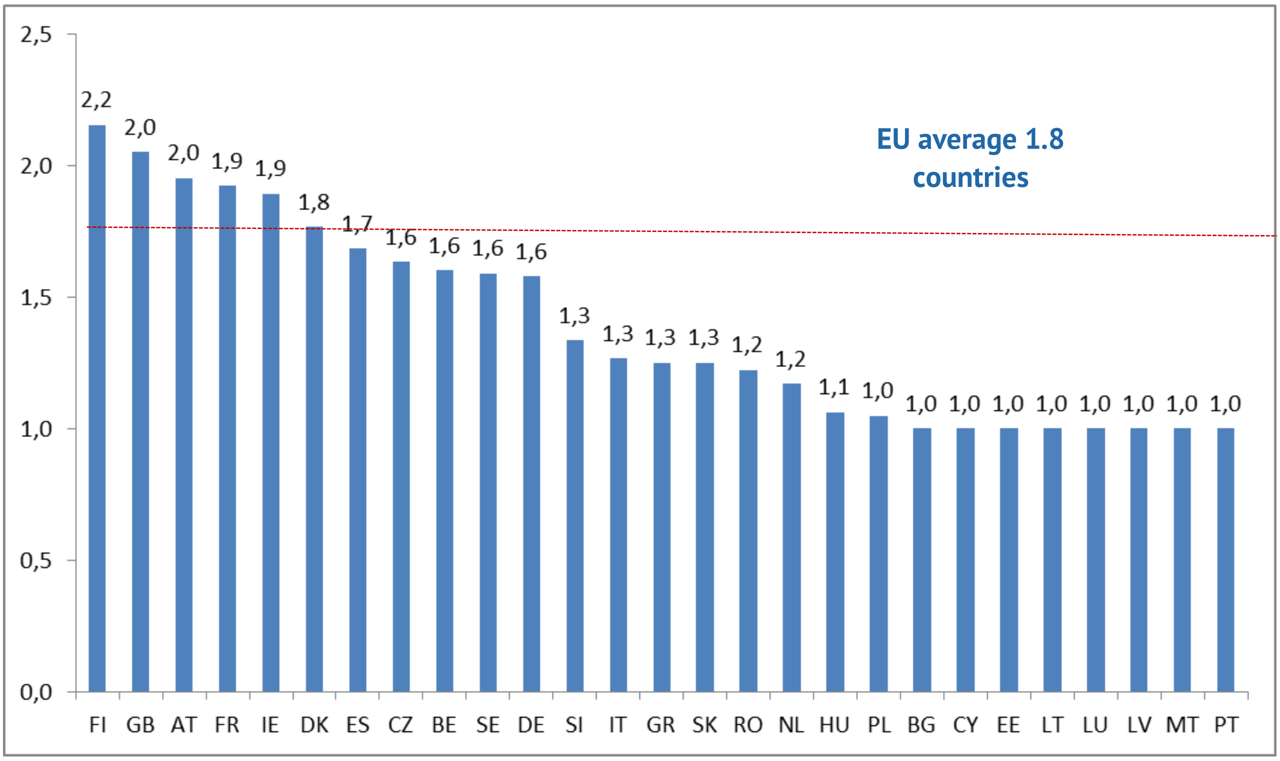
Surprisingly, Italian films struggled as well to be exported to several countries; on average, Italian film titles were ‘only’ exported to the same number of countries (1.3) as film titles produced in Slovenia, Greece and Slovakia. As Italy is among the biggest producers of films in the EU, this shows that its film industry is maybe more focused on the domestic market than on the export market.

And finally, concerning the average circulation of a film title, there appears to be a real gap between countries, with an average country circulation of 1.3.

This seems to mark the limit for films produced in countries with export potential on TV and those that are not so often exported to other markets.

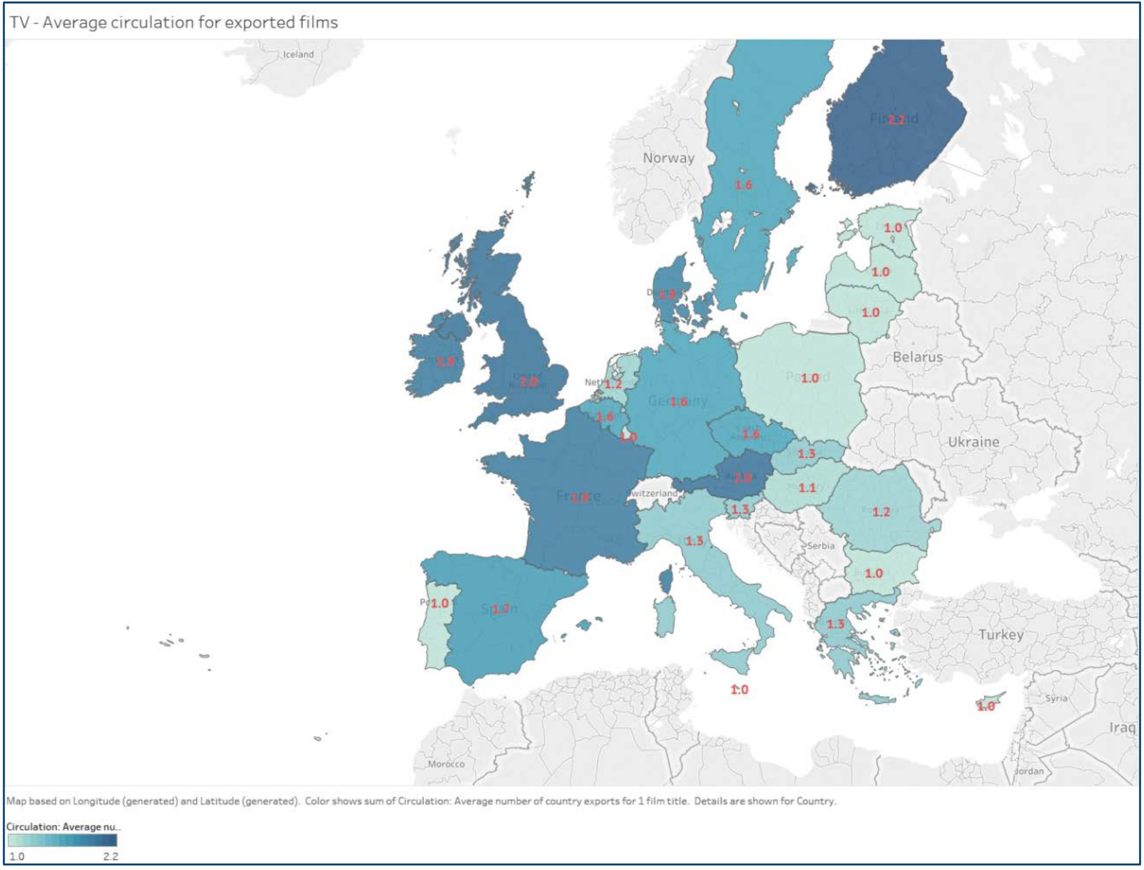
Films on TV appear to be more specific than film releases in cinemas; TV aims at a mass audience, whereas cinemagoers choose their films, and therefore cinemas aim to cater to both mass and niche audiences - exhibitors that are part of the European Cinema network would fall in the second category. This fundamental difference between cinema and TV audiences could also help explain the limited circulation of films on TV.

Figure 22. Average number of country exports / circulation for 1 film title (when film is exported), in units



Source: OBS on EurodataTV

Map 12 Average number of country exports / circulation for 1 film title (when film is exported),



TV - Average circulation for exported films

Map based on Longitude (generated) and Latitude (generated). Color shows sum of Circulation: Average number of country exports for 1 film title. Details are shown for Country.

Only films produced in France, the United Kingdom, Spain, Italy, Germany, Denmark and Ireland had the maximum reach of 17 other EU countries.

On the side of the spectrum, films produced in Cyprus, Lithuania, Luxembourg and Malta were only exported to one other EU country.

Another interesting observation is that only in seven countries (EU-5 + DK and IE, see Figure 22) were films produced that ended up being distributed in all other 17 EU countries that are part of the dataset[19] (here, the focus is on the reach of film-producing countries).

Only in Germany, Denmark, Spain, France, the United Kingdom, Ireland and Italy were films produced that were broadcasted in all other 17 EU countries, ensuring wider

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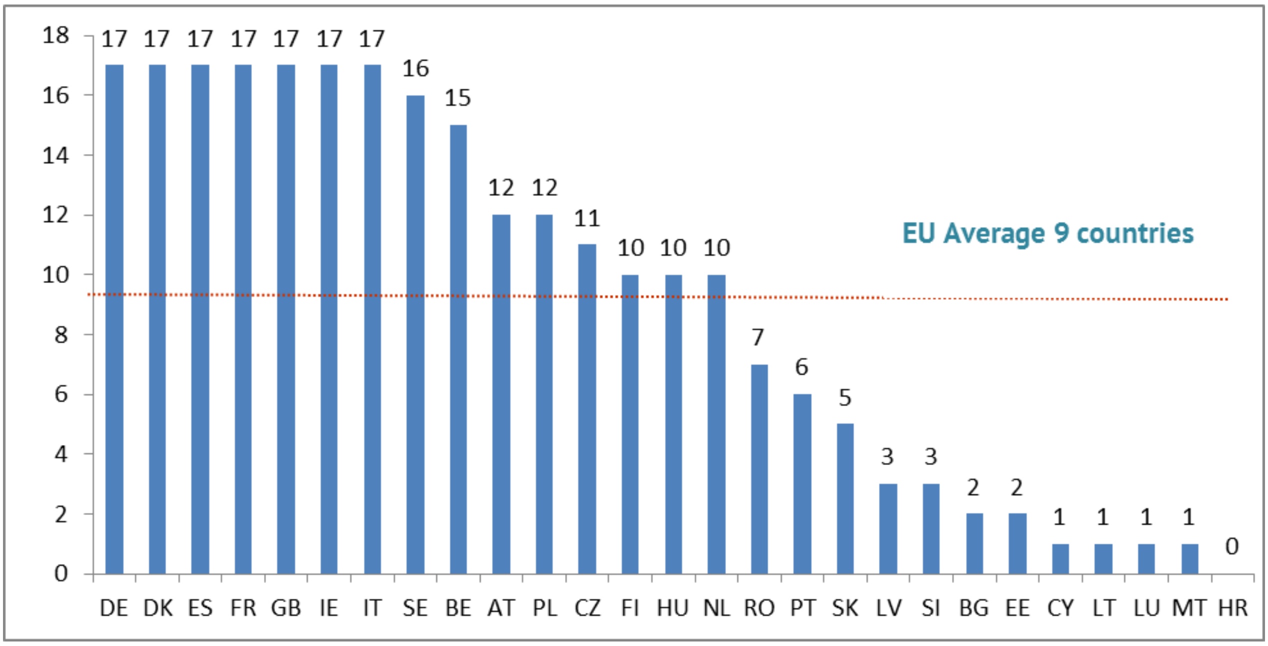
[19] For countries included in the data set the maxium number of export markets is 17, 18 EU countries – national market, whereas for films produced in countries not part of the data set the maxium is 18.

distribution (of at least one film title) than for films produced in other countries (see Figure 22).

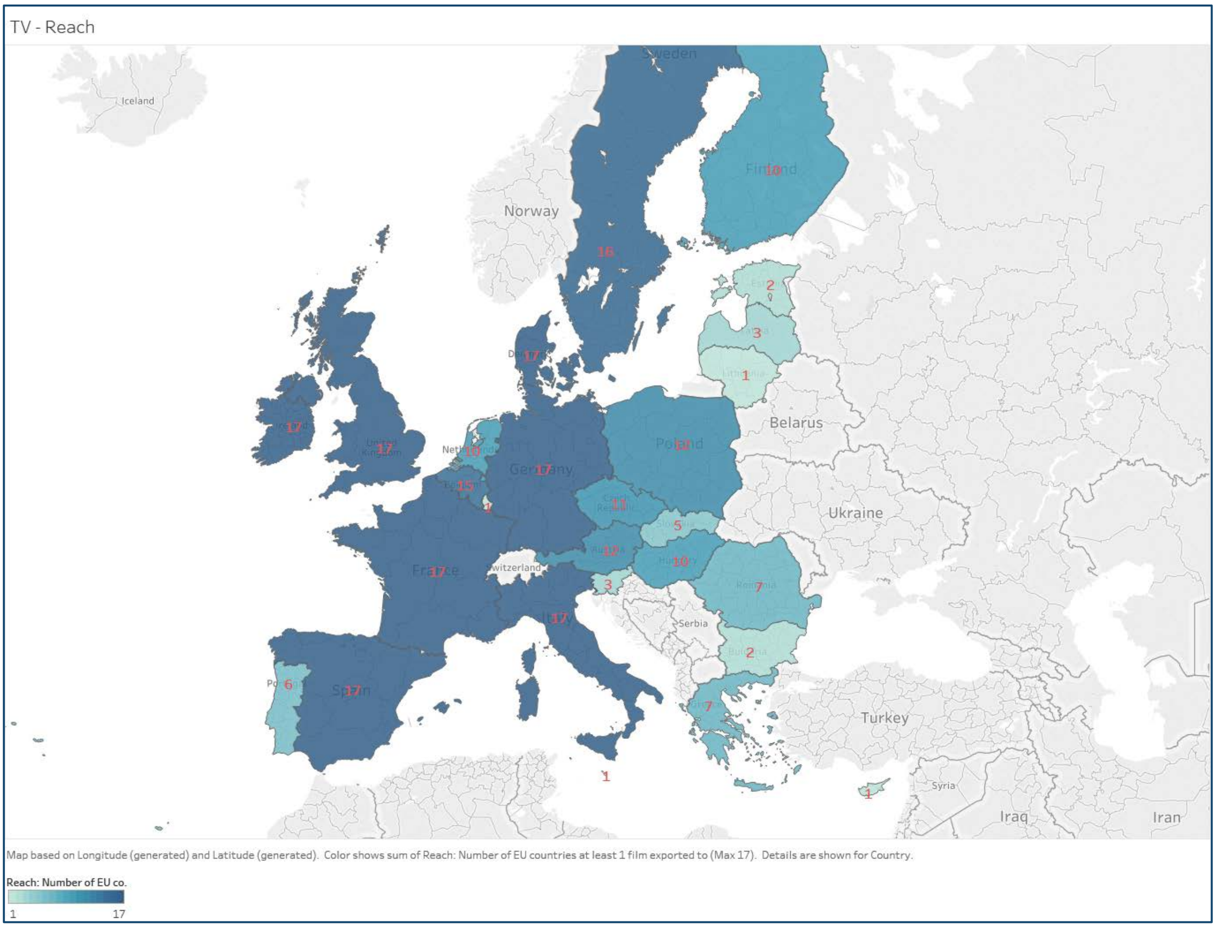
On the other hand, Croatian films were not broadcasted in any country of the sample of 18 EU countries, and films produced in Cyprus, Lithuania, Luxembourg and Malta were only broadcasted in one other country, Poland.

Figure 23. Number of EU countries to which at least 1 film was exported by country, in number of countries (max. 17 for countries included in EurodataTV data, 18 for other countries)



Source: OBS on EurodataTV

Map 13 Number of EU countries to which at least 1 film was exported by country, in number of countries



Map based on Longitude (generated) and Latitude (generated). Color shows sum of Reach: Number of EU countries at least 1 film exported to (Max 17). Details are shown for Country.

The impact of cultural proximity and language (examples) – once again, a shared language and cultural proximity appeared to favour the export of films.

For cinema exports, Matrix 3 and Matrix 4 are the export matrices for film exports. In columns are the export countries, in rows the import countries (France, from among the columns, exported 22% of its total exports to Belgium, or 409 films).

Here again, the impact of language and cultural proximity can be seen. Be reminded that EurodataTV only provided data on 18 EU TV markets, that is to say import markets. This is why no data appears in the rows for BG, CY, EE, GR, LT, LU, LV, MT, PT and SK.

Also, the absence of market data for these countries means that exports of EU non-national films are only partially reflected.

Austria’s main export market, as for cinema, was Germany, with 24% of all Austrian TV exports or 10 films.

Belgium’s largest export markets were the Netherlands and Poland, with 18% of total exports each, or 16 films, followed by Germany with 12 films (14%).

Irish films mostly ended up in the United Kingdom, with 10 exported films, or 14% of all Irish film exports.

France's biggest export markets were Belgium (22%) and Germany (13%). The same was true for Dutch films - Belgium (29%) and Germany (21%).

Surprisingly, the main export market for German films was Spain, with 20% of all German film exports, or 120 films.

As it was the case for cinema, Slovak films were mainly exported to the Czech Republic, with 50% of all exports (as we do not have data on the Slovak market, there is no possibility to verify this relationship).

Another surprise to emerge from the data is the importance of the Polish TV market for several EU countries. Poland was in the top three export markets (and even the only export market for CY, LT, LU, MT films) for films produced in AT, BE, CY, CZ, DE, DK, ES, FI, FR, GB, HU, IE, LT, LU, MT, PT, RO and SK, whereas the reverse is not true: the main export market for Polish films was Slovenia (50% of all PL film exports).

Germany was among the top three export markets for films on TV for 12 other EU countries.

Danish films' main export markets were Poland (15%), Germany (12%) and the Netherlands (11%), and not other Nordic countries.

The same was true for Finnish films for which the main exports markets were FR, NL, PL and SI - all representing 14% of Finnish film exports or four films each. Here, (supposed) cultural proximity did not enhance the export of films.

And finally, Swedish films were exported mainly to DE (18%), DK (14%) and NL (11%).

As in the case of films in cinemas, an explaining factor could be found in the share of national programming.

Language and cultural proximity appeared to play a role in the export of EU non-national films, but that role appeared less pronounced than in the case of films in cinemas (for which, however, more data on national markets was available).

Table 10 lists the top 15 film titles with the widest circulation on TV (number of EU non-national markets in which these titles were broadcasted) as well as their cinema admissions figures in the EU, cumulated after their release.

The top list is only composed of GB and FR films, most of them in English, with a certain theatrical success (a good proportion of them "blockbusters") and with 10 out of 15 co-produced (often with US studios).

Table 9. Summary of main indicators for EU non-national film exports by EU country, in units

Country	Volume of exports: Number of films exported 2015, first release	Average number of films exported to another EU country	Single film titles exported 2015, first release	Circulation: Average number of country exports for 1 film title (when exported inside EU)	Reach: Number of EU countries to which at least 1 film exported (max. 17)
AT	41	2,4	21	2,0	12
BE	88	5,2	55	1,6	15
BG	2	0,1	2	1,0	2
CY	1	0,1	1	1,0	1
CZ	31	1,8	19	1,6	11
DE	614	36,1	389	1,6	17
DK	106	6,2	60	1,8	17
EE	4	0,2	4	1,0	2
ES	160	9,4	95	1,7	17
FI	28	1,6	13	2,2	10
FR	1 880	110,6	978	1,9	17
GB	1 357	79,8	662	2,0	17
GR	10	0,6	8	1,3	7
HR	n/a	n/a	n/a	n/a	n/a
HU	17	1,0	16	1,1	10
IE	70	4,1	37	1,9	17
IT	424	24,9	335	1,3	17
LT	2	0,1	2	1,0	1
LU	1	0,1	1	1,0	1
LV	3	0,2	3	1,0	3
MT	1	0,1	1	1,0	1
NL	48	2,8	41	1,2	10
PL	22	1,3	21	1,0	12
PT	7	0,4	7	1,0	6
RO	11	0,6	9	1,2	7
SE	116	6,8	73	1,6	16
SI	4	0,2	3	1,3	3
SK	10	0,6	8	1,3	5
EU TOTAL	**5 058**	n/a	**2 864**	**1,8**	n/a

Source: OBS on EurodataTV

Table 10. Top 15 film titles with widest country circulation on TV and total admissions in cinema

Original title	**Prod.Year**	**Prod.Country**	**Total EU non-national countries broadcasted** *(Max 17)*	*Total Cinema Admissions EU*
Bean	1997	GB/US	13	*35 376 222*
Taken	2008	FR / GB / US	13	*23 821 043*
Transporter	2002	FR / US	13	*6 164 325*
Transporter 2	2005	FR	12	*10 196 549*
Bridget Jones's Diary	2001	GB / US	11	*43 978 309*
Jane Eyre	2011	GB / US	11	*3 752 072*
Notting Hill	1999	GB / US	11	*52 542 942*
Taken 2	2012	FR	11	*38 612 617*
Transporter 3	2008	FR / GB / US	11	*10 646 818*
Blitz	2001	GB / US/ FR	10	*1 253 853*
Love Actually	2003	GB / US	10	*26 331 417*
The Iron Lady	2011	GB / FR	10	*8 648 775*
Tinker Tailer Soldier Spy	2011	GB / DE / FR	10	*9 407 048*
From Paris with Love	2009	FR	9	*6 405 799*
Lockout	2012	FR	9	*3 790 908*

Source: OBS on EurodataTV and LUMIERE data

Matrix 3 TV – Export matrix 2015/2016, in % of total exports for each country and units for total exports

		COUNTRY OF EXPORT																											
		AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	HR	GR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
COUNTRY OF IMPORT	AT		2%			3%	10%	1%		2%	4%	2%	2%				1%	3%											
	BE	2%					3%	8%		6%		22%	7%				7%	3%					29%				3%		
	BG																												
	CY																												
	CZ						10%	3%		3%		6%	4%				3%	3%						5%	14%		5%		50%
	DE	24%	14%			23%		12%		9%	11%	13%	11%		20%	12%	10%	11%			33%		21%	5%		9%	18%	50%	
	DK		2%				1%			5%		2%	6%			6%	4%	2%									14%		
	EE																												
	ES	7%	2%			3%	20%	2%			4%	6%	6%		20%	6%	6%	22%						5%	14%	18%	6%		
	FI	2%	1%			3%	1%	1%	50%	1%		1%	2%				3%	0%									1%		
	FR	10%	11%				8%	10%	50%	6%	14%		6%		10%		9%	9%						5%	14%	9%	5%	25%	
	GB	7%	9%			6%	2%	7%		10%		4%			10%	6%	14%	3%					4%	5%		9%	4%		
	HR	2%	1%	50%		6%	4%	2%		5%		2%	5%				6%	3%						5%			5%		10%
	GR																												
	HU	7%	5%	50%		3%	7%	4%		8%	7%	7%	7%				6%	18%					8%	5%		9%	3%		
	IE						0%	5%		1%		0%	3%			6%		1%					2%	5%			3%		10%
	IT	5%	8%			3%	6%	7%		16%	7%	11%	11%		20%	18%	3%				33%		8%	5%	14%		5%	25%	
	LT																												
	LU																												
	LV																												
	MT																												
	NL	2%	18%			3%	7%	11%		3%	14%	3%	4%		10%	12%	6%	0%									11%		
	PL	20%	18%		100%	29%	15%	15%		17%	14%	12%	15%			24%	13%	6%	100%	100%		100%	4%		29%	36%	9%		20%
	PT																												
	RO		1%				2%	2%		3%		5%	5%			6%	6%	13%					6%	5%	14%		2%		
	SE		1%				1%	7%		1%	11%	2%	3%				1%	1%					2%	5%					
	SI	10%	6%			16%	3%	5%		6%	14%	4%	5%		10%	6%	3%	3%			33%		15%	50%		9%	6%		10%
	SK																												
	Total exports	**41**	**88**	**2**	**1**	**31**	**614**	**106**	**4**	**160**	**28**	**1880**	**1357**	**0**	**10**	**17**	**70**	**424**	**2**	**1**	**3**	**1**	**48**	**22**	**7**	**11**	**116**	**4**	**10**
	Corresponding to Single Film titles exported	**26**	**59**	**2**	**1**	**25**	**451**	**71**	**4**	**109**	**17**	**1215**	**582**	**0**	**8**	**13**	**32**	**286**	**2**	**1**	**3**	**1**	**31**	**9**	**7**	**7**	**65**	**4**	**8**

Source: OBS on EurodataTV

Matrix 4 TV – Export matrix 2015/2016, in units for exports per country and total exports

	COUNTRY OF EXPORT																											
COUNTRY OF IMPORT	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	HR	GR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
AT		2			1	60	1		3	1	29	28				1	11											
BE	1					21	8		10		409	97				5	12					14				3		
BG																												
CY																												
CZ						61	3		4		117	55				2	13						1	1		6		5
DE	10	12			7		13		15	3	236	144		2	2	7	48			1		10	1		1	21	2	
DK		2				6			8		42	78			1	3	7									16		
EE																												
ES	3	2			1	120	2			1	105	76		2	1	4	93						1	1	2	7		
FI	1	1			1	4	1	2	1		12	21				2	1									1		
FR	4	10				49	11	2	10	4		78		1		6	40						1	1	1	6	1	
GB	3	8			2	15	7		16		69			1	1	10	11					2	1		1	5		
HR	1	1	1		2	27	2		8		33	69				4	11						1			6		1
GR																												
HU	3	4	1		1	40	4		12	2	131	92				4	75					4	1		1	3		
IE						1	5		1		7	40			1		3					1	1			3		1
IT	2	7			1	38	7		25	2	209	148		2	3	2				1		4	1	1		6	1	
LT																												
LU																												
LV																												
MT																												
NL	1	16			1	40	12		4	4	48	58		1	2	4	2									13		
PL	8	16		1	9	92	16		27	4	223	205			4	9	24	2	1		1	2		2	4	11		2
PT																												
RO		1				13	2		5		102	62			1	4	54					3	1	1		2		
SE		1				8	7		1	3	33	42				1	6					1	1					
SI	4	5			5	19	5		10	4	75	64		1	1	2	13			1		7	11		1	7		1
SK																												
Total exports	**41**	**88**	**2**	**1**	**31**	**614**	**106**	**4**	**160**	**28**	**1880**	**1357**	**0**	**10**	**17**	**70**	**424**	**2**	**1**	**3**	**1**	**48**	**22**	**7**	**11**	**116**	**4**	**10**
Corresponding to Single Film titles exported	**26**	**59**	**2**	**1**	**25**	**451**	**71**	**4**	**109**	**17**	**1215**	**582**	**0**	**8**	**13**	**32**	**286**	**2**	**1**	**3**	**1**	**31**	**9**	**7**	**7**	**65**	**4**	**8**

Source: OBS on EurodataTV

2.2.4. EU non-national film exports on Transactional Video on-Demand

Key insights

- Volume: **EU non-national films accounted for** 19% of all films **available in the 68 TVOD catalogues (33 810 EU non-national films corresponding to 8 973 film titles).**
- Concentration: **EU non-national film exports were correlated to the level of film production of each country, with EU-5 countries representing** 80% **of all exports.**
- **French and British films made up the lion's share of EU non-national films in cinemas –** 61% **of all EU non-national film exports.**
- Circulation: **When an EU film was exported, it was exported to** 3.7 EU countries **on average.**
- Reach: **The reach for films of all EU COO is larger than the 2 other distributions, with films produced in 18 countries achieving the maximum reach of 25 other EU countries. Only Slovenian (9 countries reach) and Maltese films (5 countries reach) have a reach below 10 countries.**

The data for TVOD is drawn from the reports *Origin of films and TV content in VOD catalogues in the EU & Visibility of films on VOD services* and takes into account the film titles in 68 country TVOD catalogues of major pan-European services (such as Apple's iTunes) as well as country-specific TVOD services. A total of 26 EU countries are part of the report (no data for RO and SI).

Table 11. TVOD sample information[20]

Distribution	Transactional VOD
Sample size	**181 672 films**
of which international films	*138 672 films*
of which EU non-national films	*33 810 films*
of which national films	*9 187 films*
Year	October 2016
Details	Snapshot – 68 TVOD catalogues
Number of EU countries[1]	26
Single film titles (all COO)	**34 816 film titles**
Of which EU single film titles	*13 267 film titles*
Of which EU non-national single film titles	*8 973 film titles*

Source: OBS

The split by region of origin of the 181 672 films retrieved during October 2016 from the 68 TVOD catalogues that are part of the report can be seen in Figure 23.

The lion's share went once again to international films, which represented 76% of all films retrieved, or 138 675 films.

The second largest category in this split-up by region of origin was **EU non-national films, with 19% or 33 810 films,** and finally came EU national films, with 5% or 9 781 films.

As was the case for films in cinemas and on TV, films produced in the EU-5 accounted for the lion's share of EU non-national films, with 80% of all film exports.

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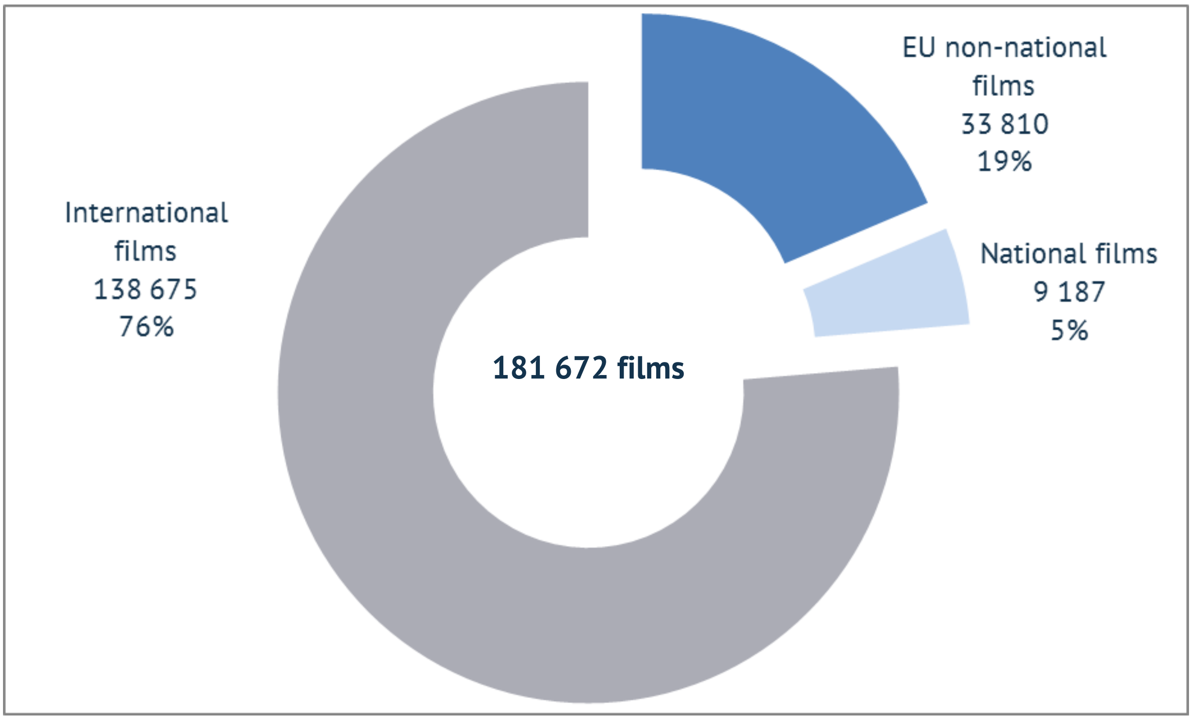
[20] See G. Fontaine and C. Grece, *Origin of films and TV content in VOD catalogues in the EU & Visibility of films on VOD services,* April 2017, European Audiovisual Observatory
Available here: http://www.obs.coe.int/industry/video/-/asset_publisher/H7fRZzJl0wZv/content/2016-originoffilmsintvodandsvodcatalogues-visibilityoffilms

Figure 24. TVOD – Region of origin of 181 672 films in 68 TVOD catalogues in the EU October 2016, in units and % of total



Source: OBS

Figure 24 displays the split-up by country of origin of the 33 810 EU non-national films. As in the case of films in cinemas and on TV, the biggest share of EU non-national films exported went to films produced in the United Kingdom, with 40% (13 563 films) and in France, with 21% (6 961 films).

In total, films produced in the EU-5 represented 80% of the total number of EU non-national films found in TVOD catalogues during the retrieval period.

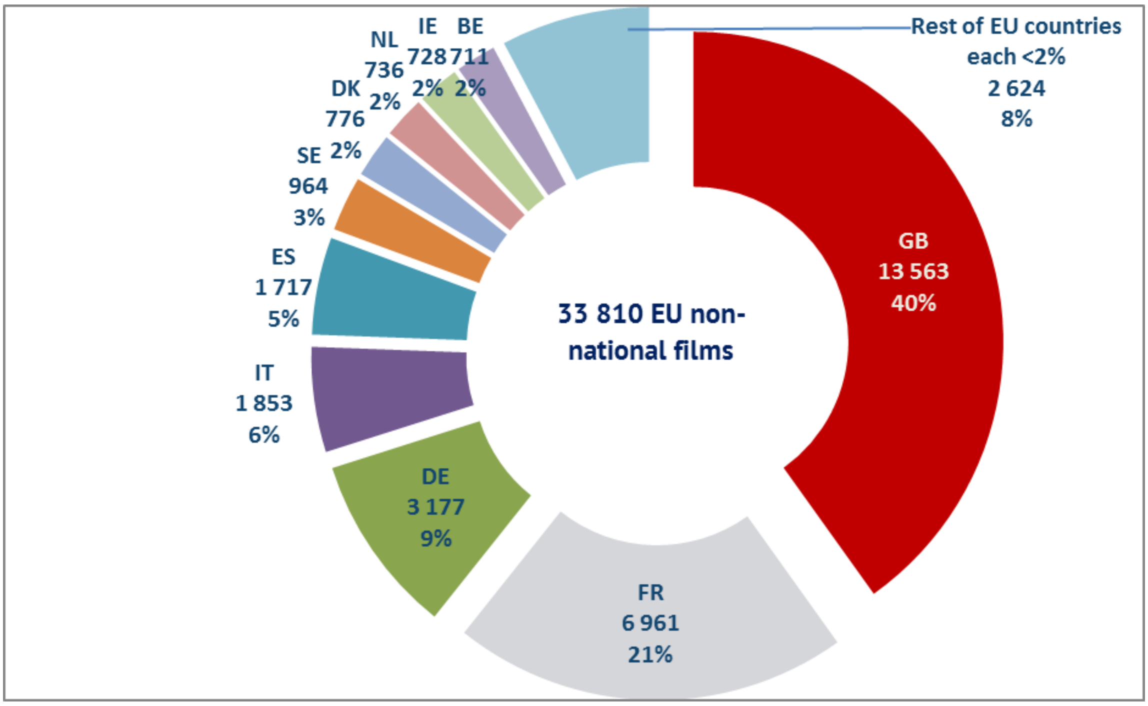
Two Nordics countries, Sweden with 3% (964 films) and Denmark with 2% (776 films), followed.

The top 10 for EU non-national films exported in TVOD catalogues was rounded up by the Netherlands with 2% (736 films), Ireland (728 films) and Belgium, with 2% (711 films).

The remaing films produced in the other 17 EU countries (no data on films produced in HR) and exported to other EU countries did not make up more than 2% for each, and accounted for 7.7% of the total, or 2 624 films. Figure 25 displays the average number of films exported to each EU country by country.

Whereas the United Kingdom exported on average 543 films on TVOD to each other EU country, and France 278 films, on the other side of the spectrum Latvia, Lithuania, Cyprus, Slovenia and Malta exported one film on average to each other EU country on TVOD.

Figure 25. Country of origin of 33 810 EU non-national films in TVOD catalogues October 2016, in units and % of total



Source: OBS

Map 14 Country of origin of 33 810 EU non-national films in TVOD catalogues October 2016

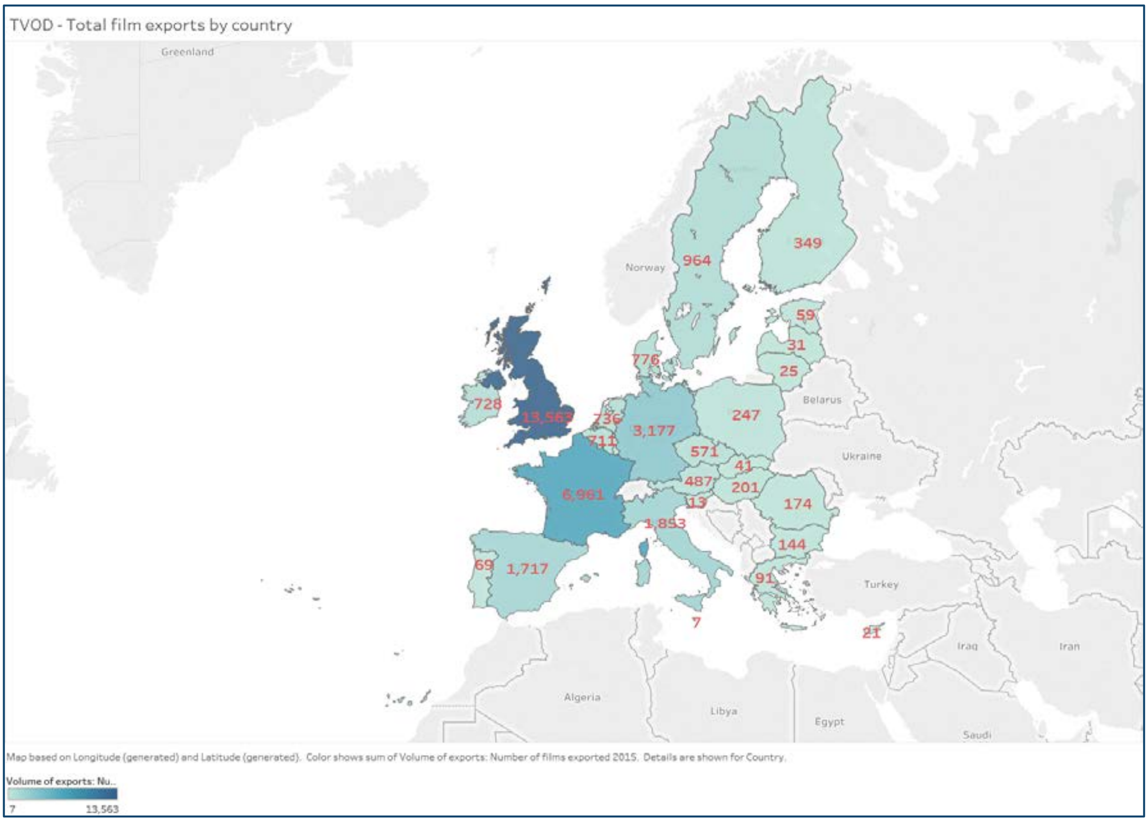
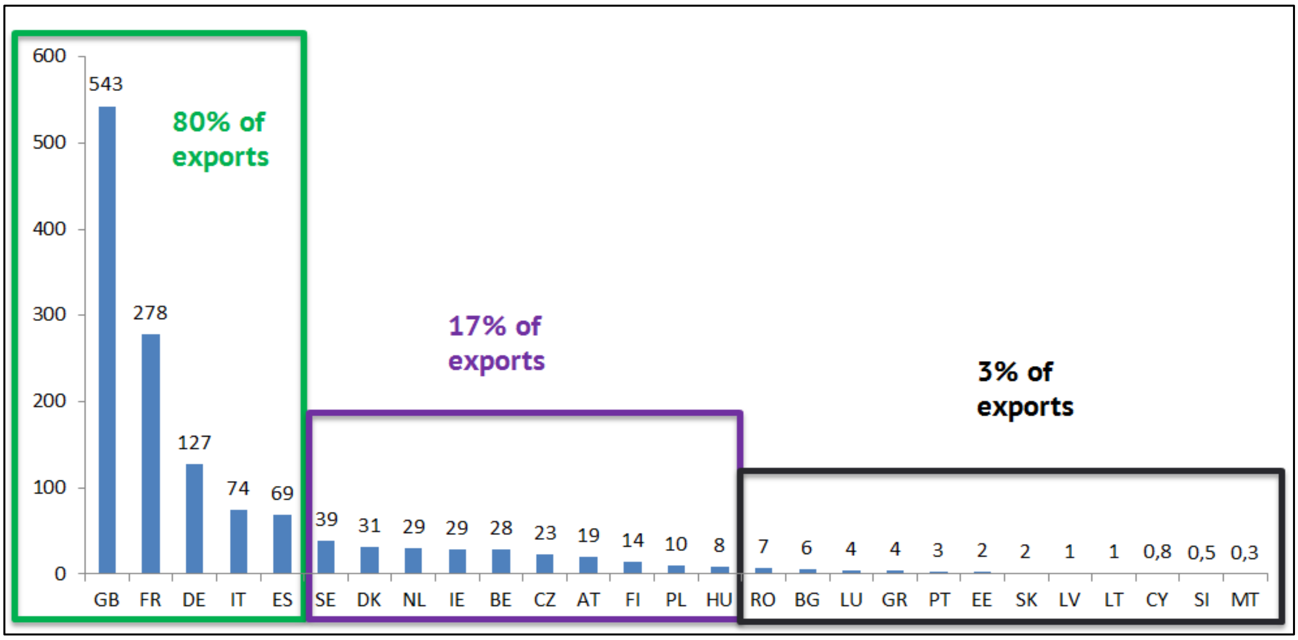


Figure 26. TVOD – Average number of films exported to another EU country by country, in units

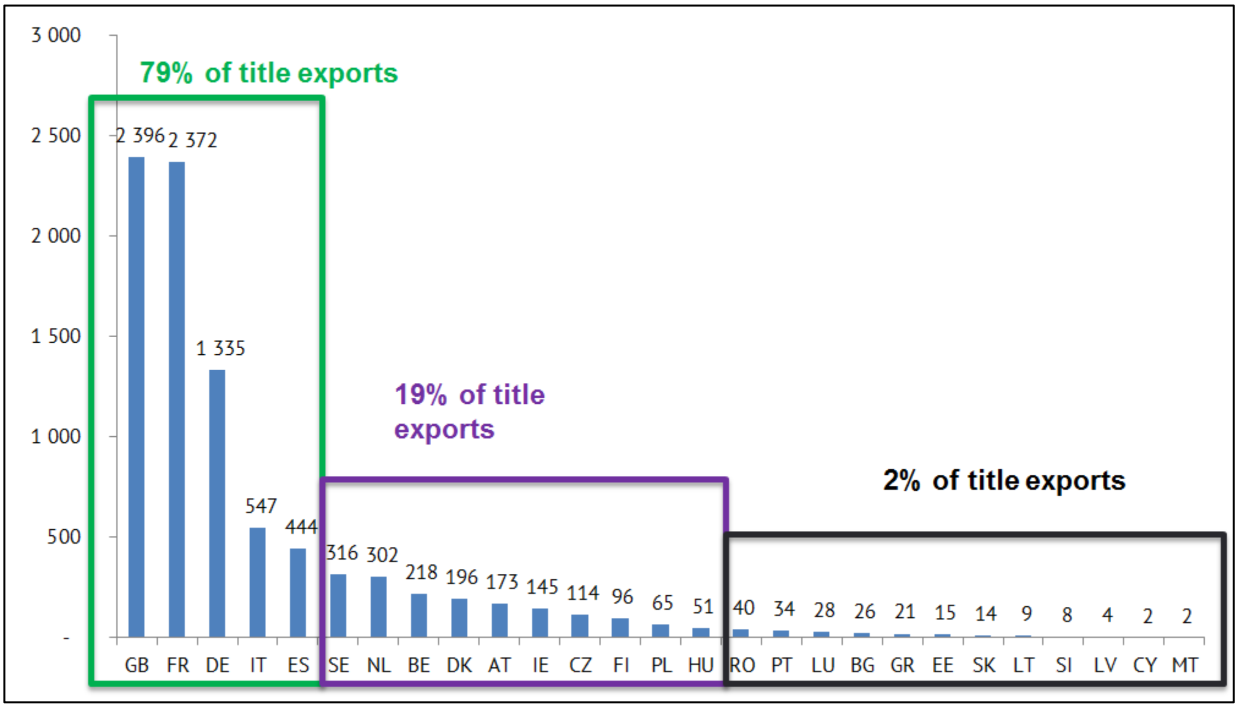


Source: OBS

Films produced in the EU-5 accounted for 79% of all EU non-national single film titles available on TVOD, showing, as was the case for films in cinemas and on TV, the correlation with volume of film production.

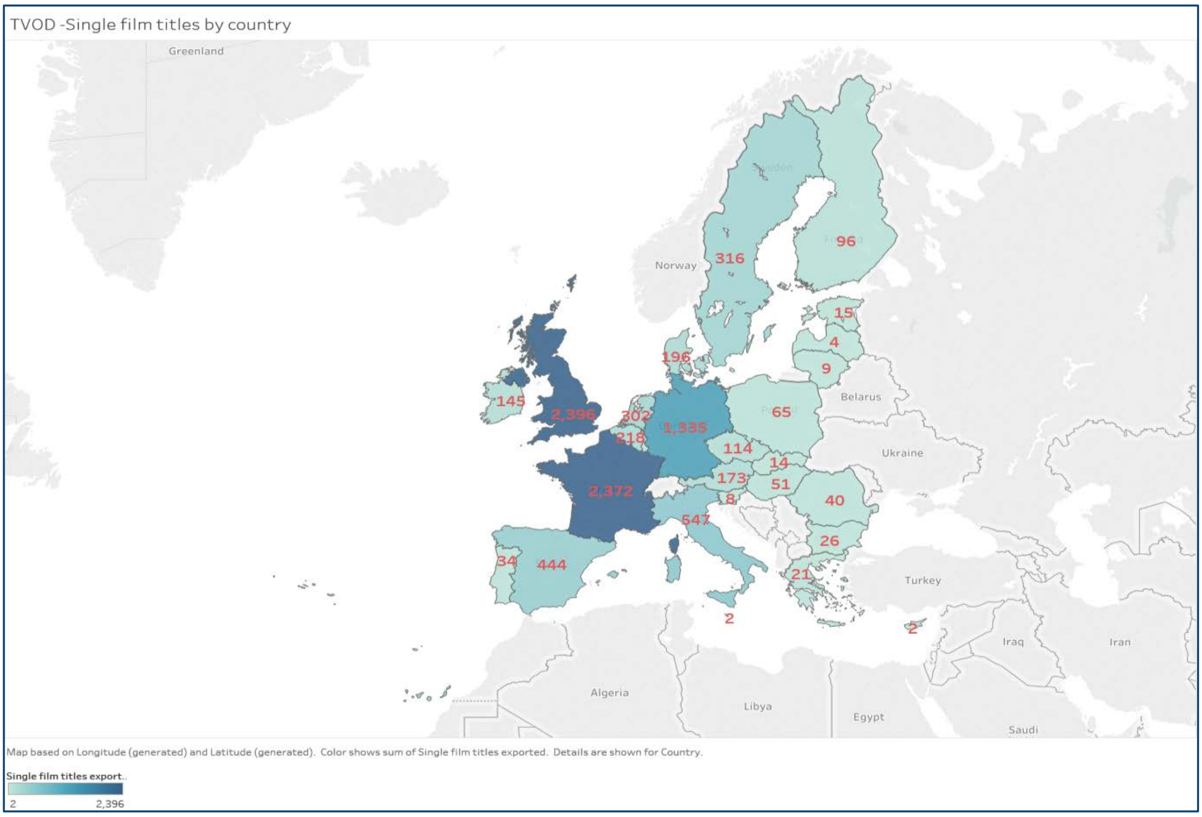
The concentration was also high when it came to single film titles (see Figure 26). A total 79% of all EU non-national film titles available on the examined TVOD services were produced in the EU-5, once again an indication that intra-EU film exports were correlated to the volume of national film production. The next 10 countries represented 18% of all EU non-national film titles and the remaining 12 EU countries produced 2% of EU non-national film titles available on TVOD in October 2016.

Figure 27. Single film titles available in at least one other EU country in October 2016 on TVOD by country of origin, in units



Source: OBS

Map 15 Single film titles available in at least one other EU country in October 2016 on TVOD

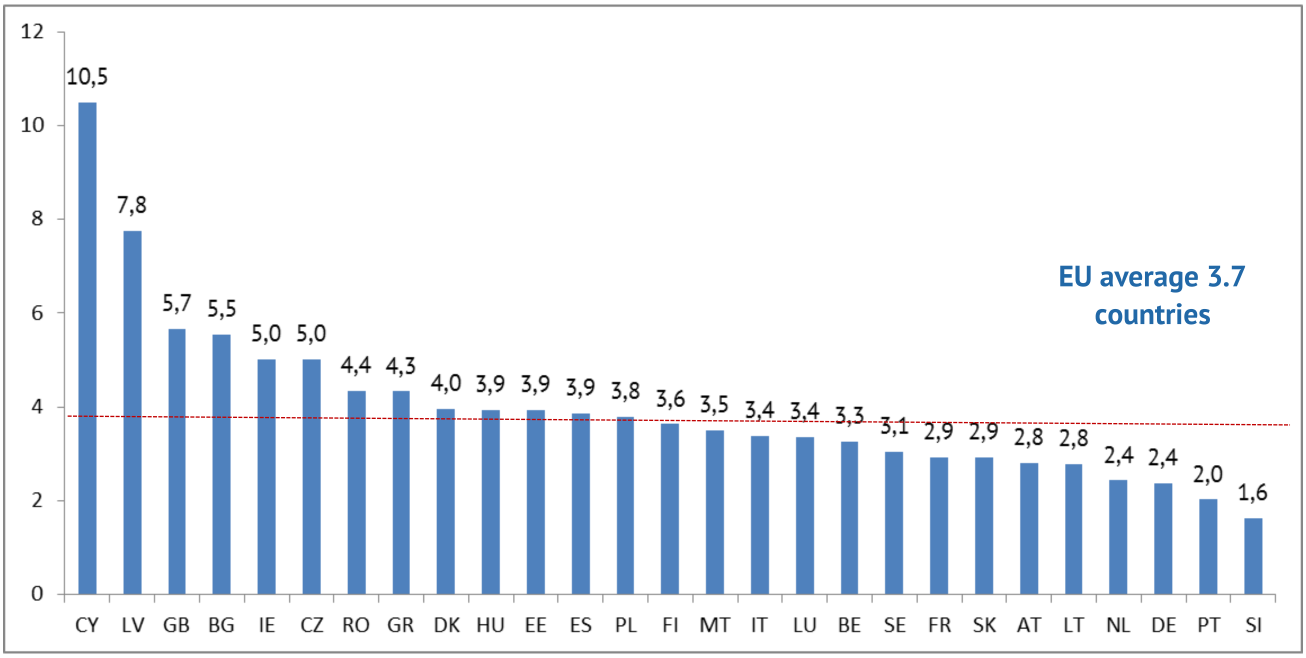


Circulation – On average when a film was exported, it was exported to 3.7 countries. Films produced in 13 countries circulated on average in more than 3.7 countries.

TVOD was the distribtution platform on which films circulated the most widely compared to circulation in cinemas and on TV.

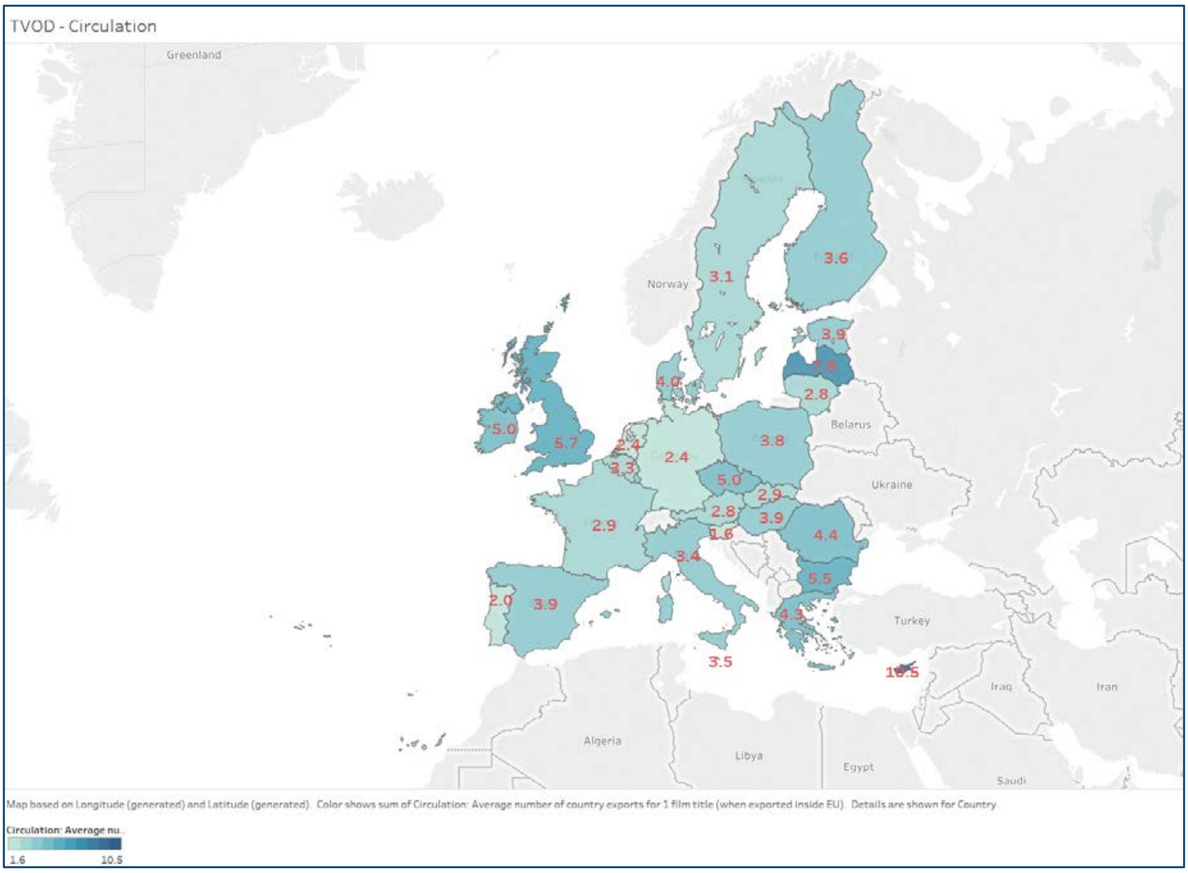
However, considering the volume of films available on TVOD, from among EU-5 countries, only British and Spanish films circulated on average in more countries than the EU average of 3.7,with averages of 5.7 and 3.9, respectively.

Figure 28. Average number of country exports for 1 film title (when film is exported), in units



Source: OBS

Map 16 Average number of country exports for 1 film title (when film is exported), in units



Reach –The reach was widest on TVOD, with films produced in 17 countries reaching the maximum number of EU markets. TVOD also enlarged the reach for films produced in countries that had a minimal reach in cinemas and on TV.

Finally, and here TVOD presented a major difference compared to distribution in cinemas and on TV, Figure 28 displays the number of countries in which at least one film was available by country of production (max. of 25 countries for all, except for RO with a maximum of 26 countries). On TVOD, films of 17 countries were available (at least for 1 title per country) in all other EU markets, whereas in cinemas only films produced in the EU-5 and Sweden were, and for films on TV only films produced in the EU-5, Denmark and Ireland managed to hit that mark.

Even for films produced in countries that had a maximal reach of only one or two countries under the previously examined distribution methods, TVOD distribution allowed for a wider reach; films from Malta were available in at least five countries (AT, DE, GB, HR and IE), films from Slovenia in nine countries and films from Lithuania in 13 countries.

TVOD allowed for much larger catalogue and thus film volume, and therefore for a much wider reach for films produced in most EU countries, in theory. As capacity is theoretically "unlimited[21]", films produced in EU countries that had a much lower reach country-wise, saw their reach increase on digital distribution, in this case TVOD. Of course, no consumption data exist but in theory films could widen their reach through online distribution.

The constraints however are negotiations with TVOD services providers, technical costs such as those related to encoding / dubbing / subtitling, copyrights, release windows and other.

Purely from a capacity point of view, films could widen their distribution online, through TVOD services or other online video providers.

But with the rising number of films available in catalogues, the key is not only getting distributed in TVOD catalgoues but also getting promoted so that consumers see and access/buy the films.

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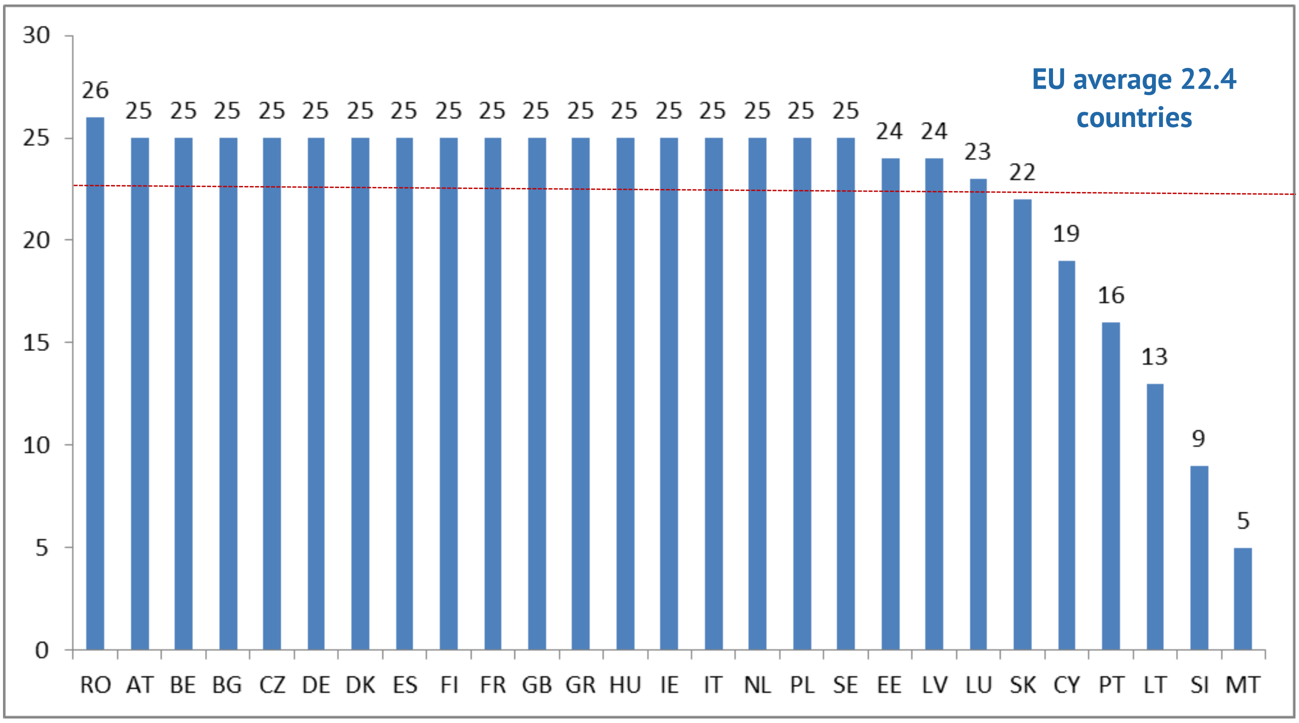
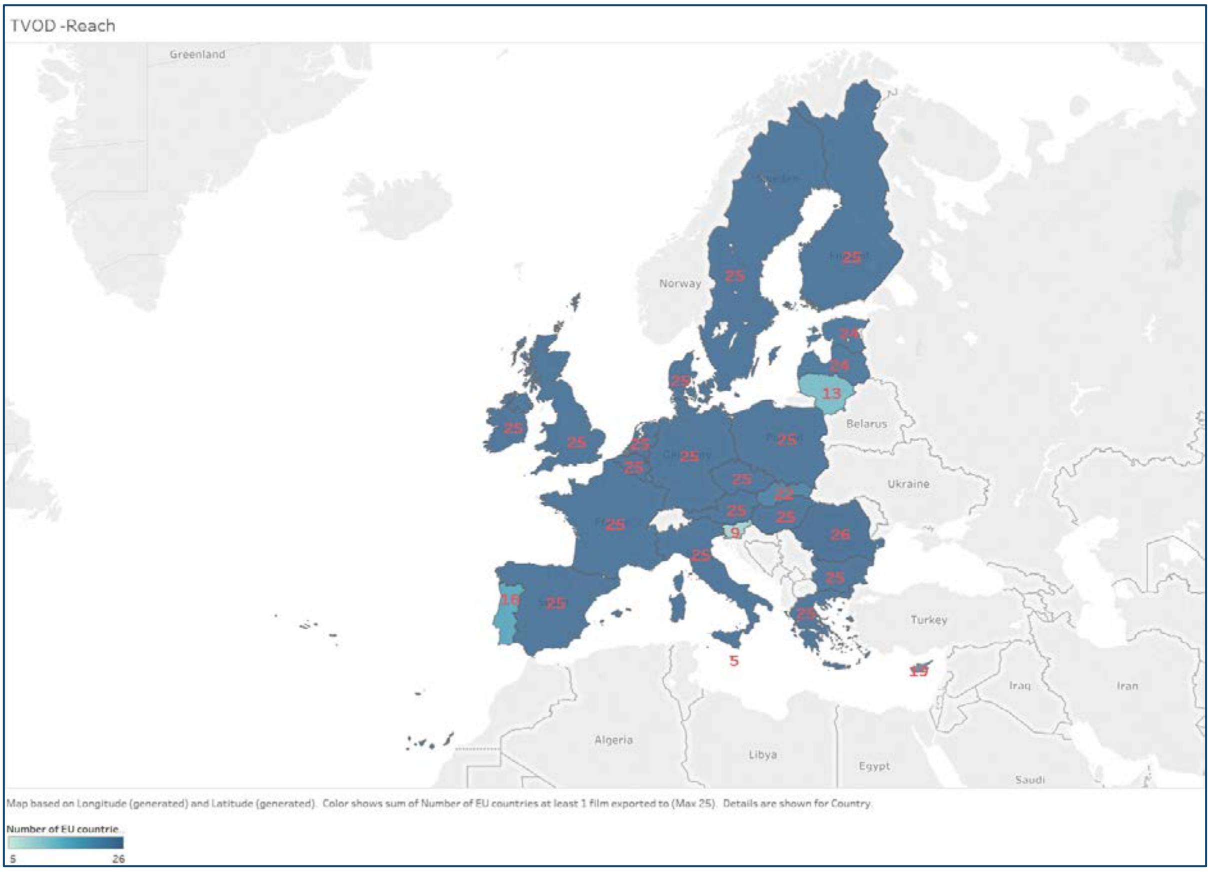
[21] Constraints exist: e.g. monetary, copyright, translation. However, in terms of pure capacity there is no limit. Cinema is limited by the number of screens available, TV by the number of broadcast slots, and DTT frequencies.

Figure 29. Number of EU countries to which at least 1 film exported by country, in number of countries (max. 25 for all countries, except RO maxium of 26 countries)



Source: OBS

Map 17 Number of EU countries to which at least 1 film exported by country



Map based on Longitude (generated) and Latitude (generated). Color shows sum of Number of EU countries at least 1 film exported to (Max 25). Details are shown for Country.

Table 12 displays the top five list of EU films with the widest distribution on TVOD services (it is not possible, currently, to provide a top list per country circulation). All films were produced in the United Kingdom, are in the English language and have been theatrical successes in the EU.

> The impact of cultural proximity and language (examples) – On TVOD also, language and cultural proximity had an impact on the export of EU non-national films.

In Matrix 5 and Matrix 6, the export matrices for TVOD are pictured for each cross-country exchange flow. Some insights can be drawn out of the data, with a focus on language and cultural proximity, to explain commercial flows for films.

German language: Austrian films' main export market on TVOD was Germany, representing 27% (130 films) of total Austrian film exports. The same was true for German films, with Austria accounting for 33% (1 044 films) of German film exports on TVOD.

French and Flemish language: Belgium was the main export market for French films with 22% (1 556 films) of all French film exports on TVOD, and France was the main export market (101 films) for Belgian films, along with the Netherlands (98 films), with both accounting for roughly 14% of Belgian film exports. Luxembourg was the third-largest export market for Belgian films on TVOD, with 10% of all Belgian film exports on TVOD (73 films). The primary export market for Dutch films was Belgium, with 199 films, or 27% of all Dutch film exports.

English language: Ireland was the main export market for British films, with 1 423 films (10% of British film exports) and the United Kingdom was the main market for Irish film exports, with 89 films (12% of Irish film exports). Both countries were, with 29%, the main market for Maltese film exports (two films).

Looking at presumed cultural proximity, the data for exchanges between Nordic countries and between the Slovak and Czech Republic offers indications that cultural proximity has an impact on the export / import of EU non-national films.

The Nordics: Sweden (14% - 50 films) and Denmark (7% - 26 films) were the main markets for Finnish film exports. The same was not true for Danish films for which the top three export markets were Austria, Germany and Ireland, with 68 films each (9% of total Danish film exports). Sweden, however, was close, with 67 films (also 9%). The main export markets for Swedish films were Denmark with 17% of total Swedish film exports (166 films) and Finland with 15% (145 films).

Czech Republic and Slovak Republic: The Slovak Republic was the main export market for Czech films, with 12% of Czech film exports (66 films), and in reverse the Czech Republic served as the primary export for for Slovak films, also with 12% (five films) of Slovak film exports on TVOD.

Table 12. Top 5 films with widest distribution on TVOD services, October 2016

Original title	Prod.Year	Prod.Country	Total VOD services *(Max 68)*	*Total EU cinema admissions*
Les Misérables	2012	GB / US	45	*37 944 259*
The World's End	2013	GB / US / JP	45	*5 203 734*
Bean	1997	GB/US	44	*35 376 222*
28 Days Later	2002	GB	42	*11 826 036*
Mr. Bean's Holiday	2007	GB / FR / DE / US	41	*20 368 510*

Source: OBS, LUMIERE (for admissions)

Table 13. Summary of main indicators for EU non-national film exports by EU country, in units

Country	Volume of exports: Number of films exported 2015	Average number of films exported to another EU country *(25 EU non-national TVOD markets)*	Single film titles exported	Circulation: Average number of country exports for 1 film title (when exported inside EU)	Number of EU countries to which at least 1 film exported (max. 25)
AT	487	19,5	173	2,8	25
BE	711	28,4	218	3,3	25
BG	144	5,8	26	5,5	25
CY	21	0,8	2	10,5	19
CZ	571	22,8	114	5,0	25
DE	3 177	127,1	1 335	2,4	25
DK	776	31	196	4,0	25
EE	59	2,4	15	3,9	24
ES	1 717	68,7	444	3,9	25
FI	349	14	96	3,6	25
FR	6 961	278,4	2 372	2,9	25
GB	13 563	542,5	2 396	5,7	25
GR	91	3,6	21	4,3	25
HR	n/a	n/a	n/a	n/a	n/a
HU	201	8	51	3,9	25
IE	728	29,1	145	5,0	25
IT	1 853	74,1	547	3,4	25
LT	25	1	9	2,8	13

Country	Volume of exports: Number of films exported 2015	Average number of films exported to another EU country *(25 EU non-national TVOD markets)*	Single film titles exported	Circulation: Average number of country exports for 1 film title (when exported inside EU)	Number of EU countries to which at least 1 film exported (max. 25)
LU	94	3,8	28	3,4	23
LV	31	1,2	4	7,8	24
MT	7	0,3	2	3,5	5
NL	736	29,4	302	2,4	25
PL	247	9,9	65	3,8	25
PT	69	2,8	34	2,0	16
RO	174	7	40	4,4	26
SE	964	38,6	316	3,1	25
SI	13	0,5	8	1,6	9
SK	41	1,6	14	2,9	22
EU TOTAL	**33 810**	**n/a**	**8 973**	**3,77**	**n/a**

Source: OBS

Matrix 5 TVOD – Export matrix October 2016, in % of total exports for each country and units for total exports

		COUNTRY OF EXPORT																											
		AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
COUNTRY OF IMPORT	AT		7%	7%	5%	4%	33%	9%	14%	8%	8%	9%	7%	3%		5%	6%	12%	12%	9%	6%	14%	9%	8%	1%	3%	8%		10%
	BE	7%		9%		3%	6%	8%	5%	8%	4%	22%	5%	8%		7%	6%	8%	4%	18%	6%		27%	8%	12%	9%	6%	15%	10%
	BG	2%	1%		5%	3%	1%	1%	2%	1%	2%	0%	2%	2%		2%	2%	1%		2%	3%		1%	1%		2%	1%		2%
	CY	3%	2%	1%		3%	2%	2%	3%	3%	3%	1%	4%	3%		3%	5%	3%	8%	3%	3%		4%	2%	1%	3%	2%		2%
	CZ	2%	1%	2%	5%		1%	1%	2%	1%	2%	1%	2%	2%		2%	2%	1%		2%	3%		1%	2%		2%	1%		12%
	DE	27%	6%	8%	5%	4%		9%	7%	8%	7%	9%	7%	3%		5%	6%	11%	12%	9%	6%	14%	8%	7%	1%	2%	7%		7%
	DK	2%	3%	5%	5%	5%	4%		3%	6%	7%	4%	6%	2%		4%	5%	5%	8%	1%	3%		2%	6%	1%	5%	17%		
	EE	2%	1%	1%	5%	4%	1%	1%		1%	1%	0%	2%	2%		2%	2%	1%		2%	3%		1%	2%		2%	1%		2%
	ES	1%	3%	4%		1%	4%	4%	5%		4%	4%	5%	4%		3%	4%	5%		1%	3%		3%	4%	3%	1%	3%		2%
	FI	2%	3%	4%	5%	5%	3%	7%	5%	5%		3%	5%	2%		3%	5%	4%	4%		3%		2%	4%	3%	3%	15%		5%
	FR	9%	14%	10%		4%	7%	7%	8%	11%	7%		6%	11%		12%	6%	10%	8%	12%	3%		5%	12%	35%	12%	6%	23%	2%
	GB	8%	5%	5%		6%	5%	8%	7%	6%	4%	5%		7%		5%	12%	5%	8%	11%	6%	29%	5%	6%	12%	8%	5%		7%
	GR	3%	2%	2%	10%	5%	2%	2%	5%	3%	2%	2%	3%			3%	3%	2%		2%	3%		2%	2%		3%	1%	8%	2%
	HR	0%	2%	1%		1%	1%	1%		1%	1%	1%	1%	1%		1%	1%	1%		1%		14%	0%	2%	3%	3%	2%	15%	
	HU	2%	2%	1%	5%	4%	1%	1%	2%	1%	1%	1%	2%	2%			2%	1%		2%	3%		1%	2%		2%	1%		2%
	IE	7%	5%	7%	5%	6%	4%	9%	5%	5%	5%	5%	10%	11%		5%		5%	8%	10%	6%	29%	5%	6%	9%	9%	5%		5%
	IT	3%	5%	8%	5%	1%	4%	4%	2%	7%	4%	7%	5%	8%		5%	5%		8%	2%	3%		3%	3%	3%	4%	5%	8%	
	LT	2%	1%	1%	5%	4%	1%	1%	2%	1%	1%	0%	2%	2%		2%	2%	1%		2%	3%		1%	2%		2%	1%		2%
	LU	5%	10%	3%		2%	5%	4%	8%	4%	2%	9%	4%	4%		3%	3%	4%	8%		6%		9%	4%	6%	6%	4%	8%	2%
	LV	2%	1%	1%	5%	4%	1%	1%	2%	1%	1%	0%	2%	2%		2%	2%	1%		2%			1%	2%		2%	1%		2%
	MT	2%	2%	3%	5%	4%	1%	1%	2%	2%	2%	1%	3%	2%		2%	2%	2%		3%	3%		2%	1%		2%	1%		2%
	NL	2%	14%	4%	5%	1%	3%	4%	3%	3%	5%	3%	4%	4%		4%	4%	2%		1%	6%			4%	7%	3%	3%	8%	2%
	PL	2%	3%	3%	10%	6%	3%	4%	3%	5%	5%	4%	3%	4%		4%	3%	7%	4%	2%	3%		3%		1%	6%	3%		10%
	PT	1%	1%	1%	5%	4%	1%	1%	2%	2%	2%	1%	2%	2%		2%	2%	1%			3%		1%	2%		1%	1%	8%	2%
	RO																												
	SE	2%	4%	6%	5%	6%	4%	9%	2%	5%	14%	5%	6%	4%		4%	6%	5%	8%	1%	3%		3%	7%	1%	3%		8%	2%
	SI																												
	SK	2%	2%	1%	5%	12%	1%	1%	2%	2%	3%	1%	2%	1%		3%	3%	1%		2%	3%		1%	2%		2%	1%		
	TOTAL EXPORT	**487**	**711**	**144**	**21**	**571**	**3 177**	**776**	**59**	**1 717**	**349**	**6 961**	**13 563**	**91**	**n/a**	**201**	**728**	**1 853**	**25**	**94**	**31**	**7**	**736**	**247**	**69**	**174**	**964**	**13**	**41**

Source: OBS

Matrix 6 TVOD – Export Matrix October 2016, in units

COUNTRY OF IMPORT	COUNTRY OF EXPORT																										
	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
AT		48	10	1	24	1044	68	8	139	28	641	891	3	n/a	11	46	214	3	8	2	1	65	19	1	5	76		4
BE	35		13		15	183	59	3	130	15	1556	681	7	n/a	14	43	150	1	17	2		199	20	8	15	56	2	4
BG	9	9		1	19	27	6	1	22	6	30	243	2	n/a	5	16	22		2	1		7	3		3	6		1
CY	13	13	2		17	71	16	2	43	12	98	521	3	n/a	6	37	49	2	3	1		28	4	1	5	17		1
CZ	11	10	3	1		35	7	1	24	7	47	264	2	n/a	5	17	22		2	1		7	4		3	7		5
DE	130	42	11	1	24		68	4	133	26	639	895	3	n/a	11	41	199	3	8	2	1	58	18	1	4	72		3
DK	12	22	7	1	30	113		2	95	26	282	773	2	n/a	8	39	85	2	1	1		17	14	1	8	166		
EE	9	10	2	1	24	28	7		22	5	32	248	2	n/a	5	15	24		2	1		8	4		4	9		1
ES	7	22	6		8	129	34	3		13	283	672	4	n/a	6	28	90		1	1		21	9	2	2	31		1
FI	10	20	6	1	29	103	52	3	81		238	731	2	n/a	6	35	73	1		1		15	10	2	6	145		2
FR	42	101	14		22	214	58	5	184	26		832	10	n/a	24	43	191	2	11	1		39	30	24	21	56	3	1
GB	38	33	7		32	152	62	4	101	15	372		6	n/a	11	89	100	2	10	2	2	34	14	8	14	47		3
GR	13	13	3	2	26	70	14	3	46	8	116	414		n/a	7	25	44		2	1		13	5		5	9	1	1
HR	1	12	1		3	32	10		20	2	100	137	1	n/a	3	6	21		1		1	1	4	2	5	17	2	
HU	10	11	2	1	22	29	7	1	24	5	35	238	2	n/a		16	22		2	1		8	5		4	6		1
IE	34	38	10	1	32	139	68	3	90	17	378	1423	10	n/a	10		101	2	9	2	2	38	16	6	15	47		2
IT	15	38	12	1	8	142	34	1	128	13	474	716	7	n/a	10	35		2	2	1		24	8	2	7	51	1	
LT	9	10	1	1	22	25	7	1	22	5	31	245	2	n/a	5	14	22		2	1		8	4		4	8		1
LU	22	73	5		10	145	31	5	69	8	630	495	4	n/a	7	21	68	2		2		63	10	4	10	35	1	1
LV	8	10	1	1	21	27	6	1	20	5	30	243	2	n/a	5	14	22		2			8	4		4	8		1
MT	11	12	4	1	21	47	9	1	38	8	68	451	2	n/a	5	17	36		3	1		12	3		4	13		1
NL	8	98	6	1	6	110	32	2	49	17	229	579	4	n/a	9	28	43		1	2			10	5	5	33	1	1
PL	11	20	5	2	37	102	32	2	88	17	254	463	4	n/a	9	25	121	1	2	1		20		1	10	31		4
PT	5	8	2	1	21	31	11	1	26	6	36	279	2	n/a	4	17	17			1		9	6		2	7	1	1
RO	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
SE	12	27	9	1	32	132	67	1	93	50	316	854	4	n/a	9	42	92	2	1	1		23	17	1	5		1	1
SI	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
SK	12	11	2	1	66	47	11	1	30	9	46	275	1	n/a	6	19	25		2	1		11	6		4	11		
TOTAL EXPORT	**487**	**711**	**144**	**21**	**571**	**3177**	**776**	**59**	**1717**	**349**	**6961**	**13563**	**91**	**n/a**	**201**	**728**	**1853**	**25**	**94**	**31**	**7**	**736**	**247**	**69**	**174**	**964**	**13**	**41**

Source: OBS

These three sections have shown in more detail that EU non-national films do circulate and that the volume of film production has an impact on volume of film exports (EU-5 countries, asthe biggest producers of feature films in the EU, are also, not surprisingly, the biggest exporters of EU films). Also, the data shows that language and cultural proximity play a role in the exchange flows for EU non-national films, but are not the only explaining factor.

Before looking at the import market for EU non-national films, two more insights can be drawn from the data which have not yet be shown in these sections: co-productions impact the circulation of EU non-national films and the volume of exports should not be the only measure of EU non-national film circulation. Two related questions need to be answered before we look at how countries import other EU films.

To what extent do co-productions play a role in the export of EU non-national films?

What happens if export volumes are analysed relative to the volume of film production? Could smaller film-producing countries be more efficient?

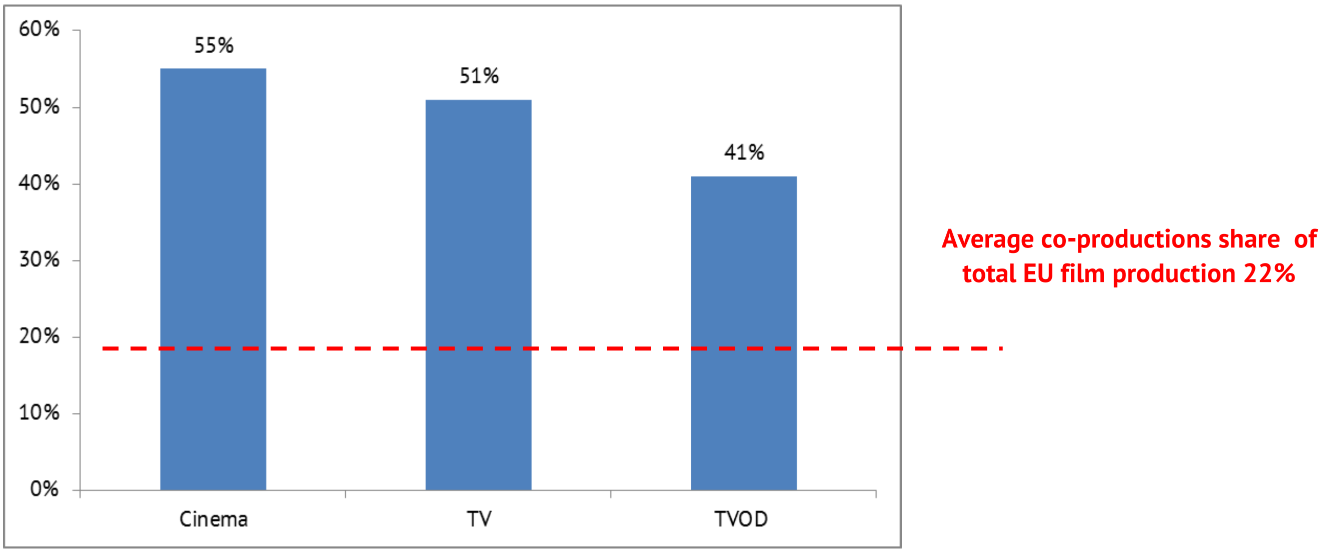
2.3. The share of EU co-productions among EU non-national film exports – A key differentiator for film exports?

Main insights

- Co-productions travelled better in cinemas (55% of all EU non-national films) and by a slight margin on TV (51%). On TVOD, co-productions accounted for 41%.
- Considering that co-productions represented 22% on average of EU film production, they were overrepresented and thus travelled better than 100% national productions.
- Co-productions were the main exports for smaller volume-producing countries and for some they were even the sole films exported.
- Co-productions appeared to enhance the circulation of EU films, at least in cinemas and on TV.
- For TVOD, considering the large number of films available, the picture was less clear – the impact of co-productions and 100% national productions for exports was different depending on the country of origin.

When talking about the export of films, and particulary the export of films inside Europe, it is important to ascertain how a film was produced. Do co-productions help EU films circulate better inside the EU? And if so, are there certain countries for which co-productions are of major importance for film exports and even film production? This section presents several data points on the importance of co-productions for the circulation of EU non-national films.

Figure 30. Co-production share of EU non-national films by distribution, in % of total



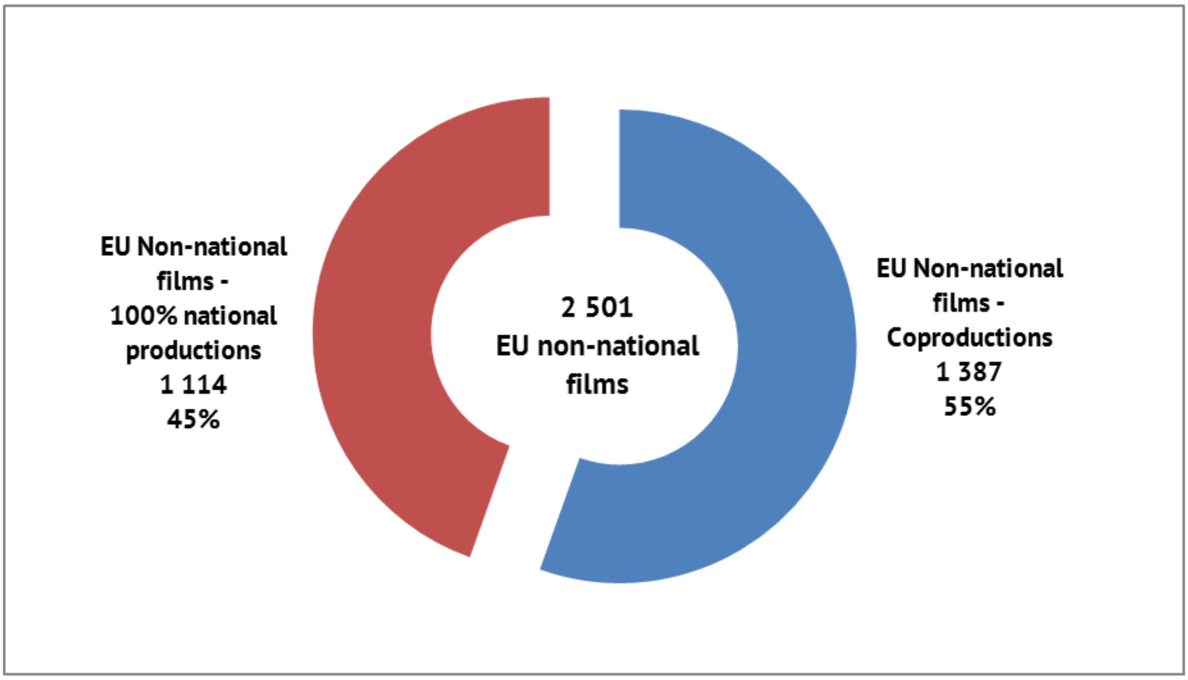
Source: LUMIERE, OBS on EurodataTV, OBS

2.3.1. EU co-productions share of film exports in cinemas

- Co-productions made up the main share of EU non-national film exports, with 55%.
- For smaller film-producing countries, co-productions were essential for intra-EU film exports. The reason could well be that co-productions were released at the very least in the co-producing countries.
- The co-productions share of intra-EU film exports was larger than the co-productions share of average film production; this shows that co-productions, on the whole, travelledbetter than 100% national productions.
- National films on the other hand were strongly skewed towards 100% national productions: a total of 77% of national films in EU cinemas on a first release in 2015 were 100% national productions.

The 2 501 exported EU non-national films in cinemas on first release in 2015 were 55% co-productions and 45% fully national productions (see Figure 24). The balance was thus tipped in favour of co-productions, albeit it by a narrow margin. But for which countries were co-productions of greater importance for film exports?

Figure 31. Cinema – Share of co-productions and 100% national productions out of 2 501 EU non-national films, in % of total and units



Source: OBS on LUMIERE data

Figure 28 displays the co-productions share of total film exports for each EU country. For example, Bulgaria, which exported a total of 15 films (representing three single film titles), had a 100% co-productions share. This was because each of the three Bulgarian film titles on release in other EU countries wa a co-production: *Sadilishteto (2014 - BG/DE/HR); Automata (2014 – BG/ES);* and *Urok (2014 – BG/GR)*. From the figures, it becomes clear that for lower volume film-producing countries such as BG, LT, LU, LV, HU, GR, RO, PT, FI, BE and IE, the majority of film exports were co-productions[22].

Only 11% per year of Italian films were co-productions (see Figure 3) or including an annual average of18.7 majority co-produced films out of a feature film output of 170 films on average per year (see Figure 1). And yet 67% of all Italian film exports were co-productions.

However, the rest of the EU-5 countries were below the EU average when it comes to the co-productions share of total exports; these are countries that produce the most films in the EU, involving in general films with bigger production budgets. These films, when 100% nationally produced, do not appear to have difficulties travelling.

But even these high volume-producing countries exported proportionally more co-productions than the co-productions share of their total feature film production. For bigger or smaller film producers, co-productions appear to enhance the ‘travel ability’, on average, of most films.

The United Kingdom’s film exports (of which co-productions represented on average 9% of total feature film production by year, see Figure 3) included co-productions to the tune of 49%. Hungary, which on average majority co-produced only 6% of its feature film production, recorded an 85% co-productions share of total exports.

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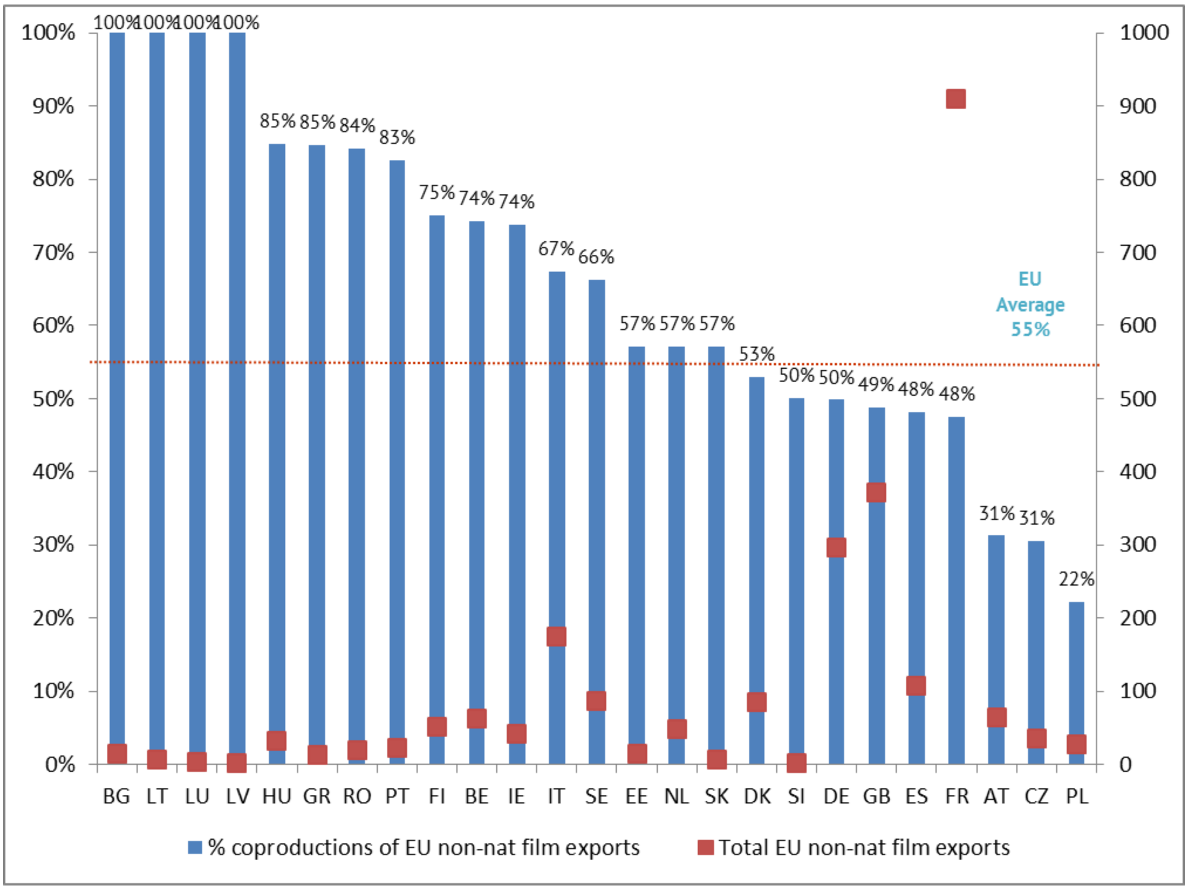
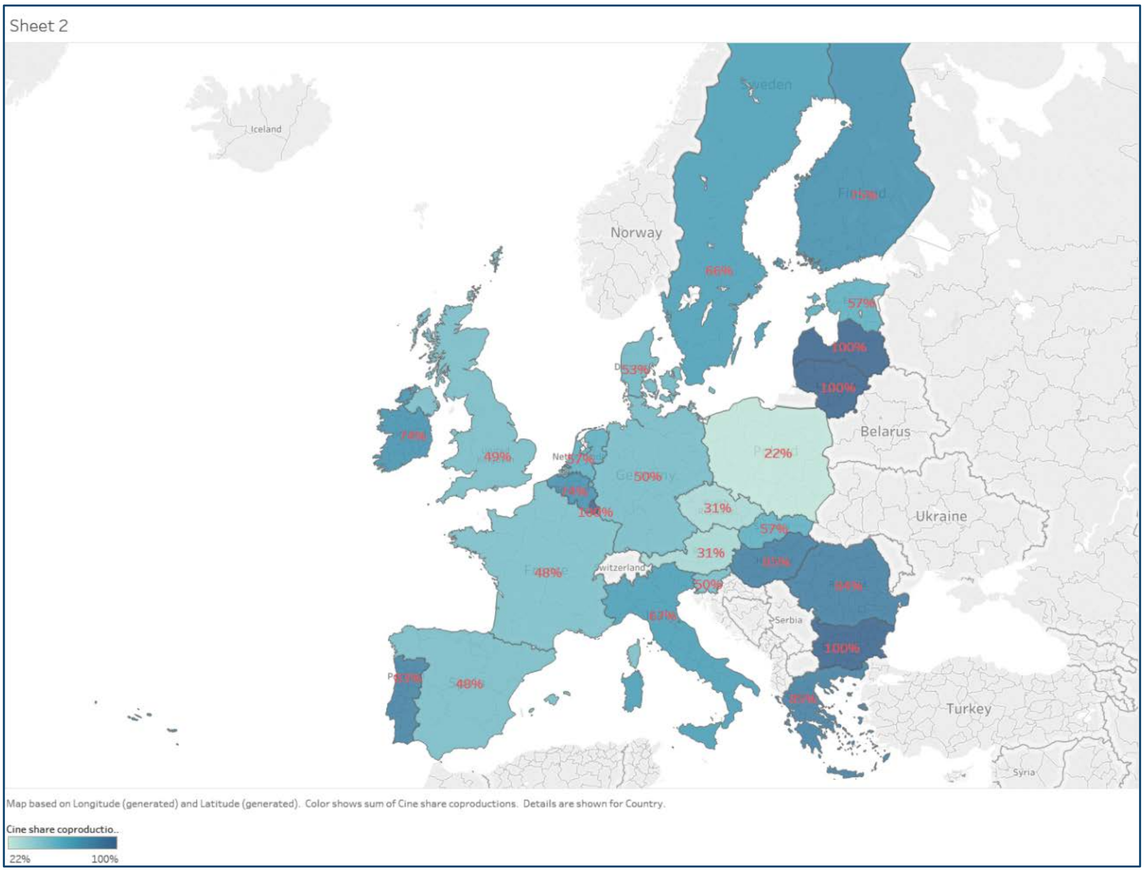
[22] The countries for which co-productions made up 100% of EU non-national film exports:
LT - 2 films on release: *L’adopcio (2015 – LT/ES)* and *Sangailes vasara (2015 – LT/FR/NL)*
LU: 3 films on release: *108 Rois-Démons (2014 – LU/BE/FR), Extraordinary Tales (2013 – LU/US/ES/BE)* and *Les Brigands (2015 – LU/DE/BE)*
LV: 2 films on release: *Hei Rasma! Praam (2015 – LV/EE)* and *Need, Kes Julgesid (2015 – LV/IS)*
And for BG, see above

Figure 32. Cinema - Co-productions share of total film exports by country and total film exports by country, in % of total and units



Source: OBS on LUMIERE data

Map 18 Cinema - Co-productions share of total film exports by country



Co-productions, according to these statistics, fared better as exports than 100% national productions.

This becomes even clearer in Figure 31, which compares the co-productions share of total film exports to the co-productions share of total feature film production by year by country. For each country, the co-productions share of total exports was higher, relatively, than the co-productions share of annual production.

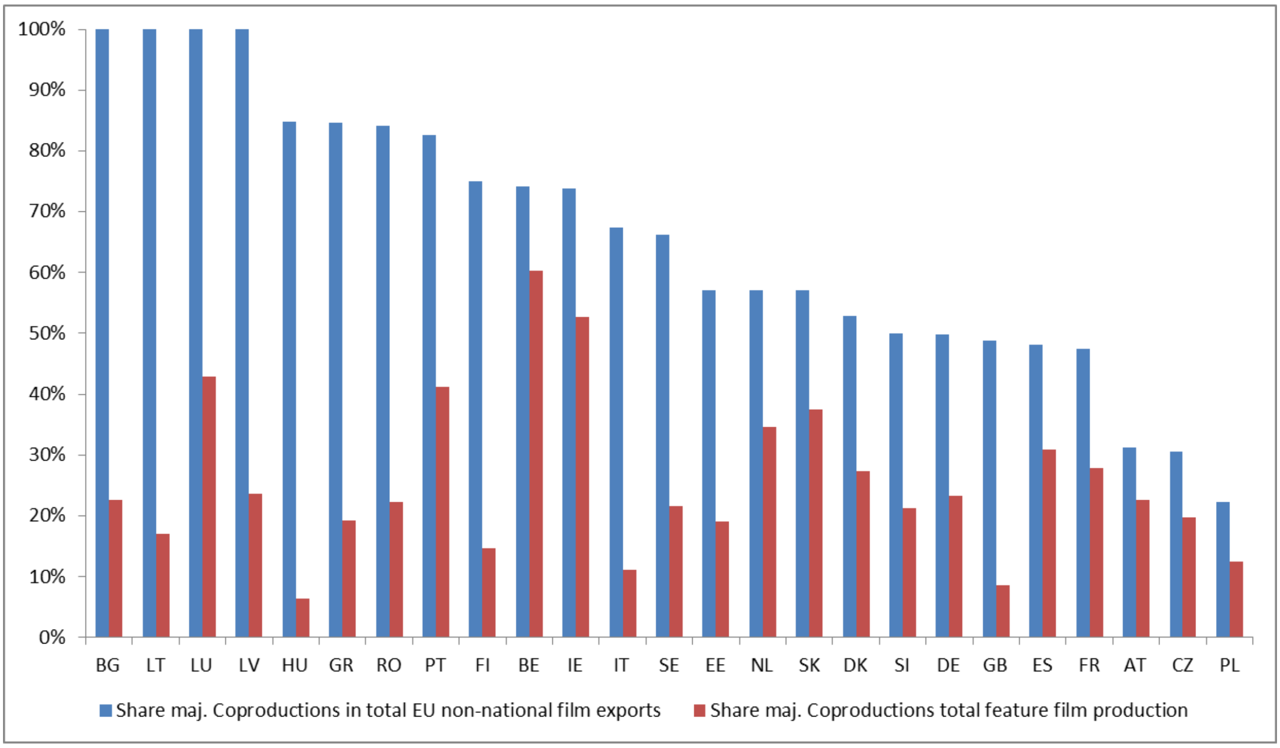
This means that co-productions were overrepresented in EU non-national film exports (there should have been a lower number of co-productions, if one expected a direct link between feature film production and exports).

This overrepresentation therefore demonstrates that co-productions travelled better and were for lower volume-producing countries well-nigh the only way to make their film travel.

Fully national productions of these lower volume film-producing countries (and indeed of all countries) travel, according to these figures and the comparison with average film production (see Figure 1 and Figure 3), more difficultly than co-productions.

Actually, this observation makes sense from a market point of view; a co-produced film will often be released in most of the co-producing countries, unlike 100% national productions which must stimulate interest abroad, either by being nominated for festivals, having a high production budget, being shot in English, dealing with cultural issues close to other countries, or other factors.

Figure 33. Cinema – Comparison: Co-productions share of total film exports and co-productions share of average feature film production by country, in % of totals



Source: OBS on LUMIERE and Yearbook 2016

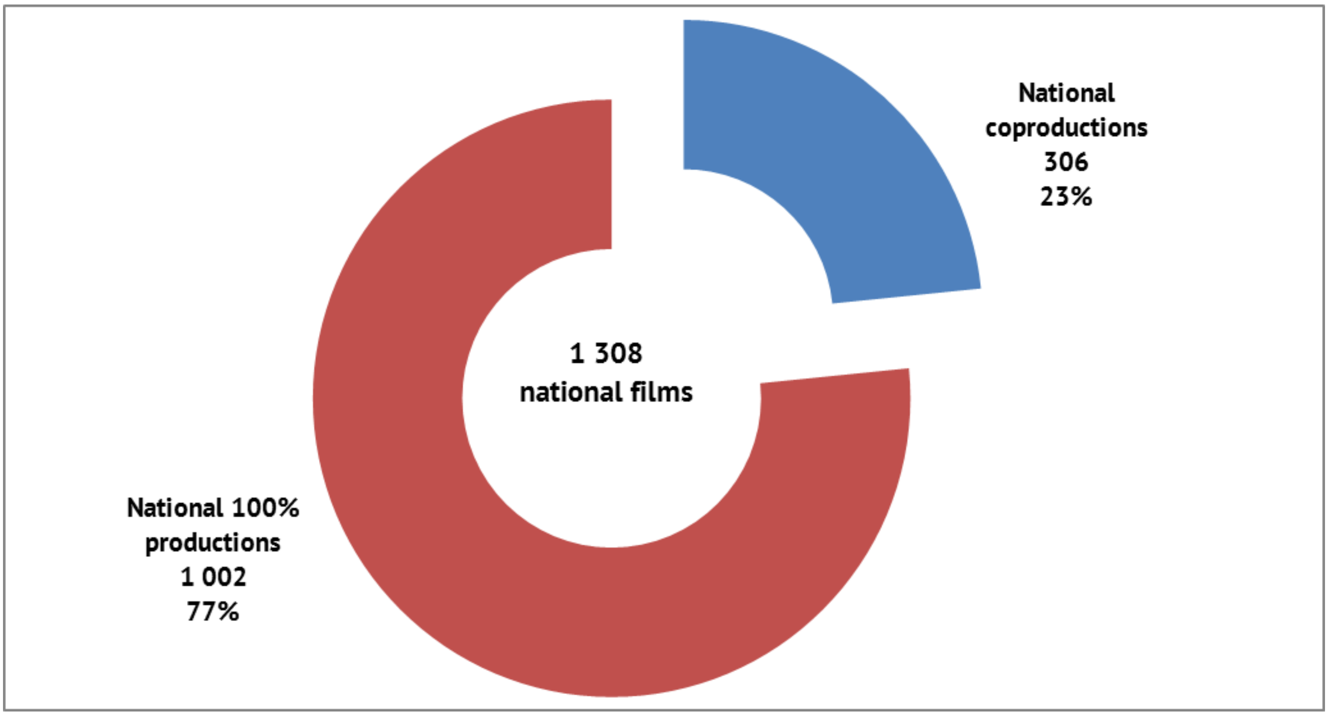
The importance of co-productions becomes even clearer when only the 1 308 national films released on their national market are considered (see Figure 11).

The split-up between 100% national productions and majority co-productions is displayed in Figure 32. In this setting, co-productions made up only 23% (or 306 films), whereas 100% nationally produced films comprised the lion’s share with 77% (1 002 films). This is further evidence that when it comes to film circulation (= export of films), co-productions travel better on average, while audiences prefer to see national films in their home market.

This does not mean that 100% national productions do not travel: they made up 45% of all EU non-national films that were exported. Co-productions appear to travel better, however, and are for lower volume-producing countries the main type of feature films thattravel abroad - for several countries even the only type.

This finding is true in the data set for first releases in cinemas, but could it also be true for films on TV and on TVOD?

Figure 34. Cinema – Share of co-productions and 100% national productions out of national films only, in % of total and units



Source: OBS on LUMIERE data

2.3.2. EU co-productions share of film exports on TV

Co-productions were slightly more represented than 100% national productions among EU non-national films on TV; 51% of all EU non-national films were co-productions

For several countries (LT, LU, MT, SI, PT, RO, IE, SK, FI, HU) co-productions represented more than 75% of their EU non-national film exports.

Even for the United Kingdom, which only co-produced 9% of its feature film production on average, co-productions represented 53% of its EU non-national film exports.

Only for LV, DE, PL, NL and CY did co-productions represent less than 1/3 of EU non-national film exports.

For only seven out of 27 countries did co-productions represent less than 50% of EU non-national film exports.

National films on the other hand comprised mainly 100% national productions – 81% compared to only 19% co-productions.

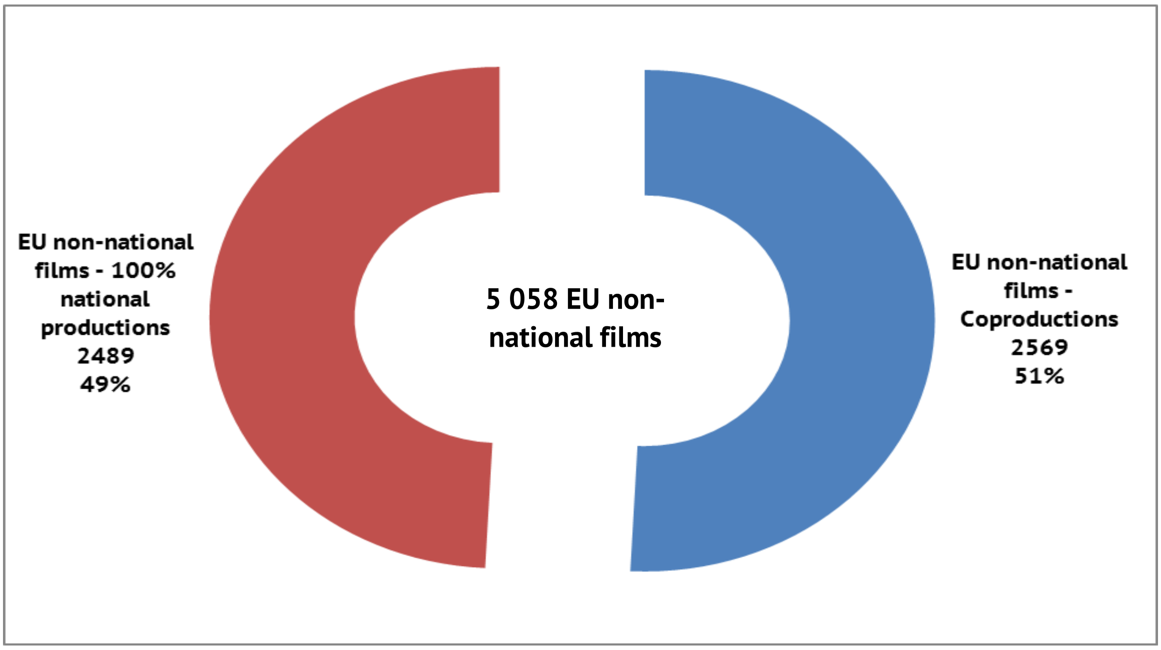
For EU non-national film exports on TV, the split between co-productions and 100% national productions was slightly in favour of co-productions, by a narrow margin (51%-49%). Out of the 5 058 exports of EU non-national films, 51% or 2 569 films were co-productions (see Figure 34).

As was the case for film exports in cinemas, co-productions made up the larger share of film exports for smaller volume-producing countries[23] (see Figure 35), although by a narrow margin.

The findings for cinema distribution relating to smaller volume-producing countriesare echoed here; again, the main exports are co-productions (see Figure 35) and the share of co-productions out of total exports is more significant, relatively, than the co-productions share of total film production (see Figure 36). Co-productions thus appear to really enhance the probability of a film circulating in other EU countries.

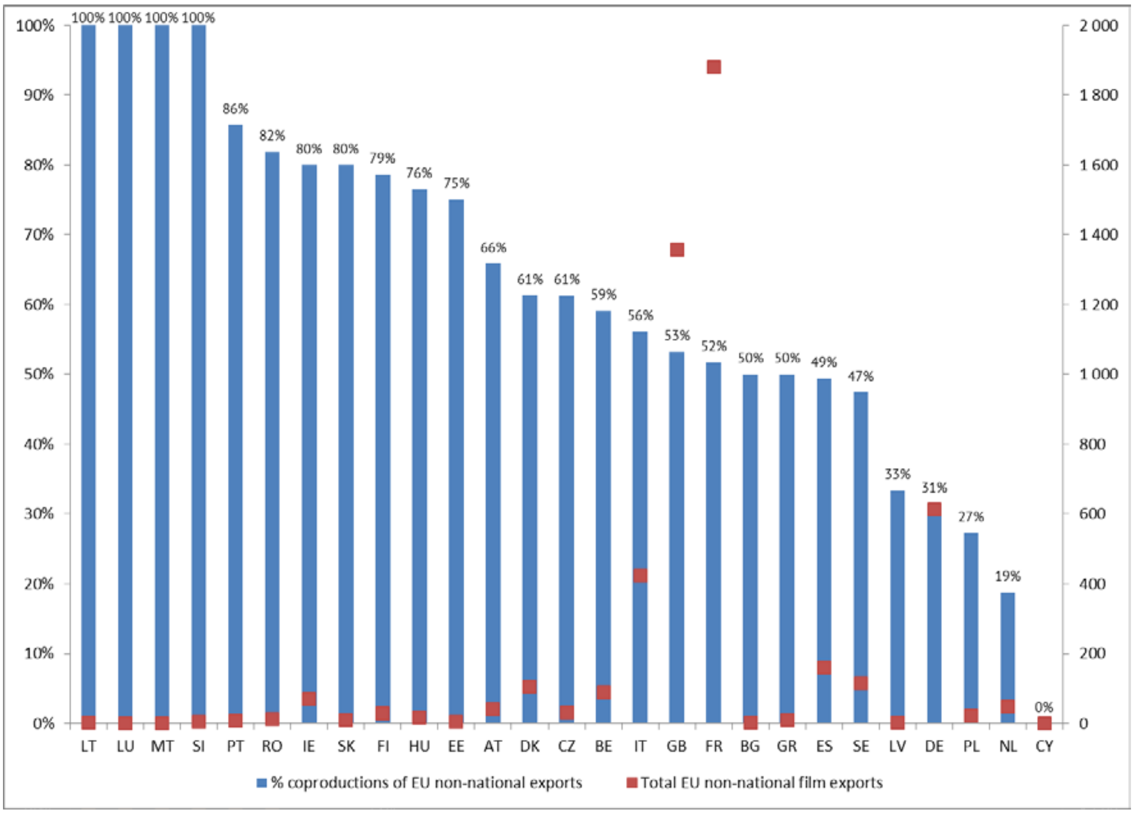
Finally, as was again the case for cinema, national films were more likely to be 100% national productions (81% on a pan-European level) than co-productions.The predominance of 100% national productions on a pan-European level is influenced by the importance of 100% national productions of smaller volume film-producing countries, as can be seen in Figure 35, with Sweden and Finland relying on 100% national productions for 95% of their national films for example.

Figure 35. TV - Share of co-productions and 100% national productions out of 5 058 EU non-national films, in % of total and units



Source: OBS on EurodataTV

Figure 36. TV – Co-productions share of film exports by country and total film exports by country, in % of total and units



Source: OBS on Eurodata TV

Map 19 TV – Co-productions share of film exports by country

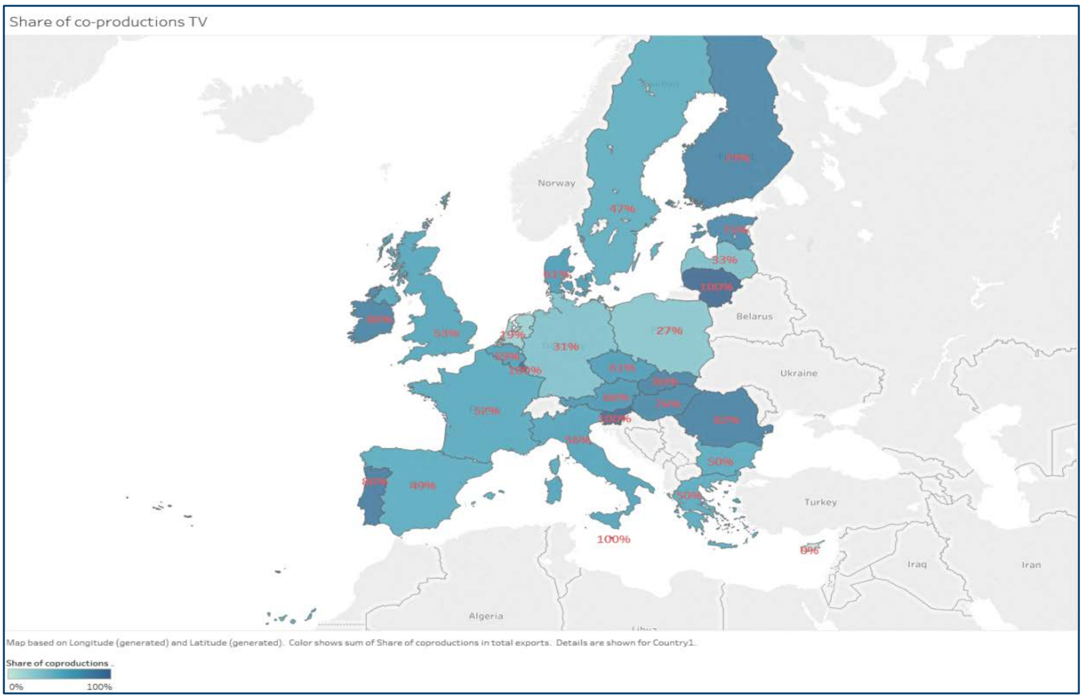
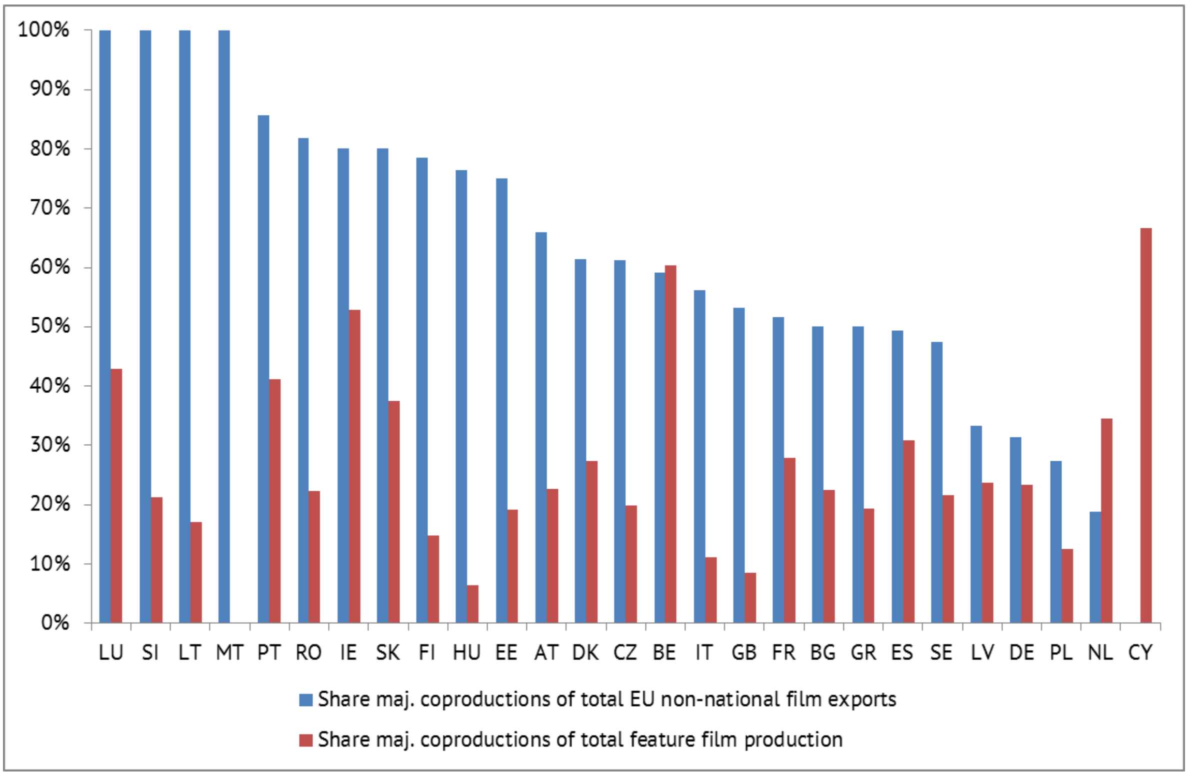
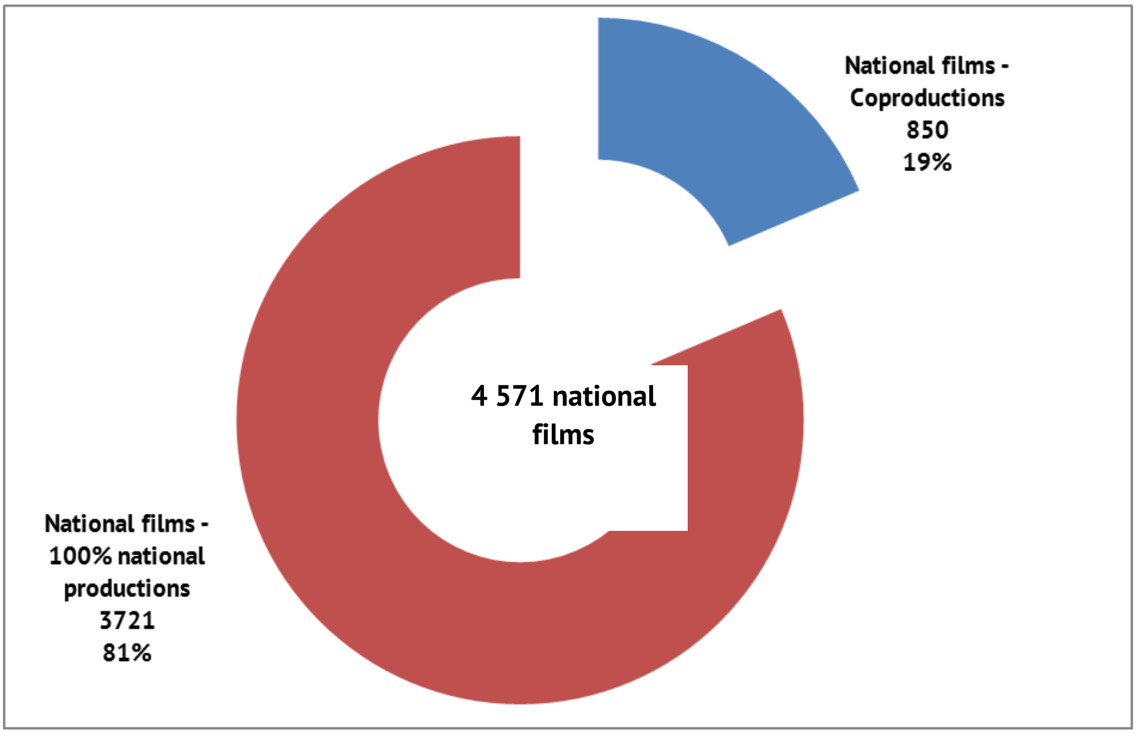


Figure 37. TV – Comparison: Co-productions share of total film exports and co-productions share of average feature film production by country, in % of totals



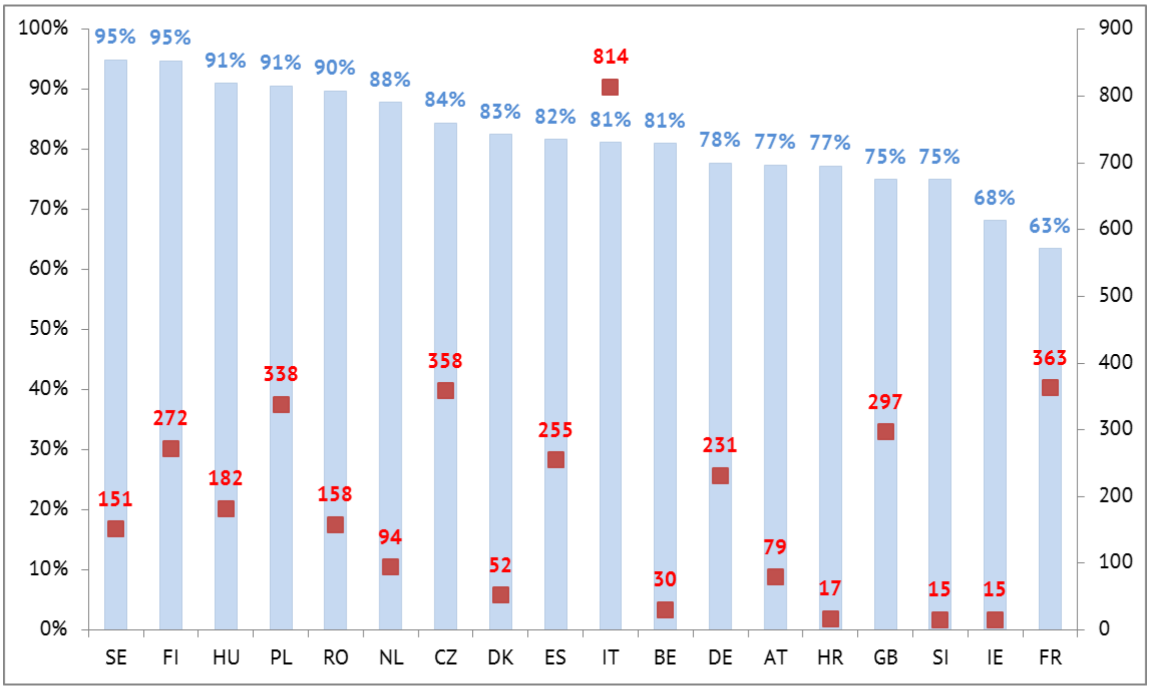
Source: OBS on EurodataTV and Yearbook 2016

Figure 38. TV – Share of co-productions and 100% national productions out of national films only,in % of total and units



Source: OBS on EurodataTV

Figure 39. Number of 100% national films incl. in percentage of total national films by country, in units and % of total



Source: OBS on EurodataTV and Yearbook 2016

2.3.3. EU co-productions share of film exports on TVOD

On TVOD, co-productions did not make up the main share of EU non-national films, with 41%.

However, considering the large number of films available and the average co-productions share of EU film production (22%), they did travel better.

The large 100% national film share could be explained by several big budgets, and theatrical success films produced in the United Kingdom and France.

Except in the case of the Netherlands, Latvia and Malta, co-productions represented more than 1/3 of EU non-national film exports for each country.

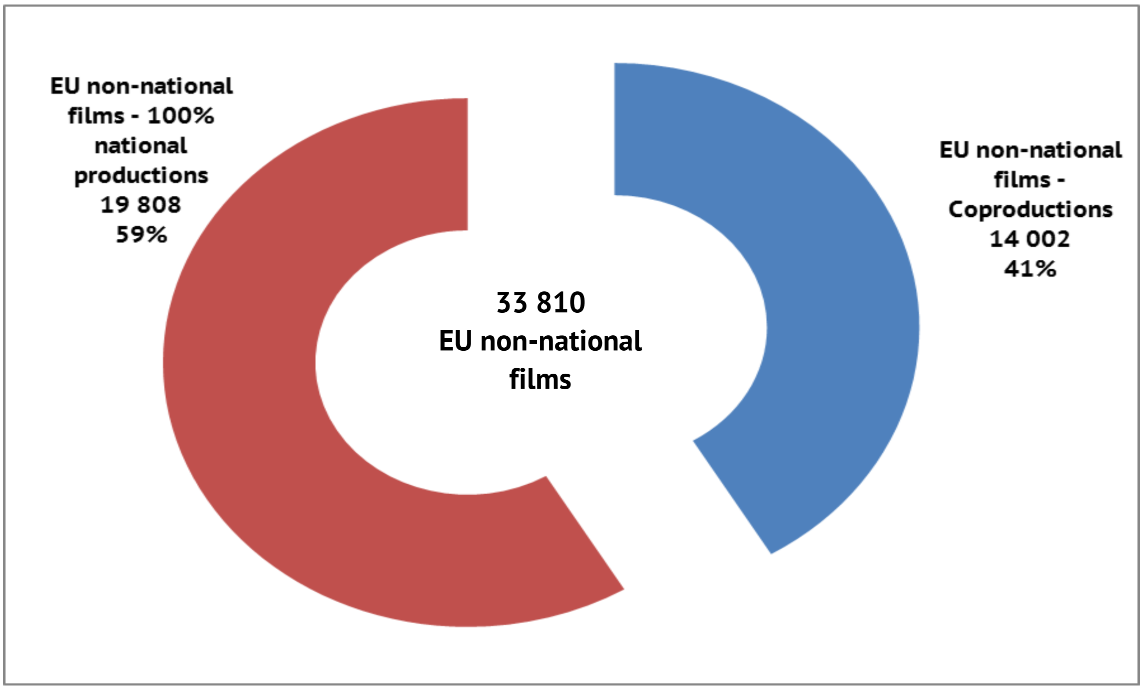
For Romania, the Slovak Republic, Luxembourg, Portugal and Cyprus, co-productions represented more than 70% of their film exports.

Co-productions were overrepresented among the film exports of almost every country relative to their average co-production production volume (except for Belgium, Ireland, the Netherlands and Latvia).

National films available on national TVOD services were mainly (72%) 100% national productions .

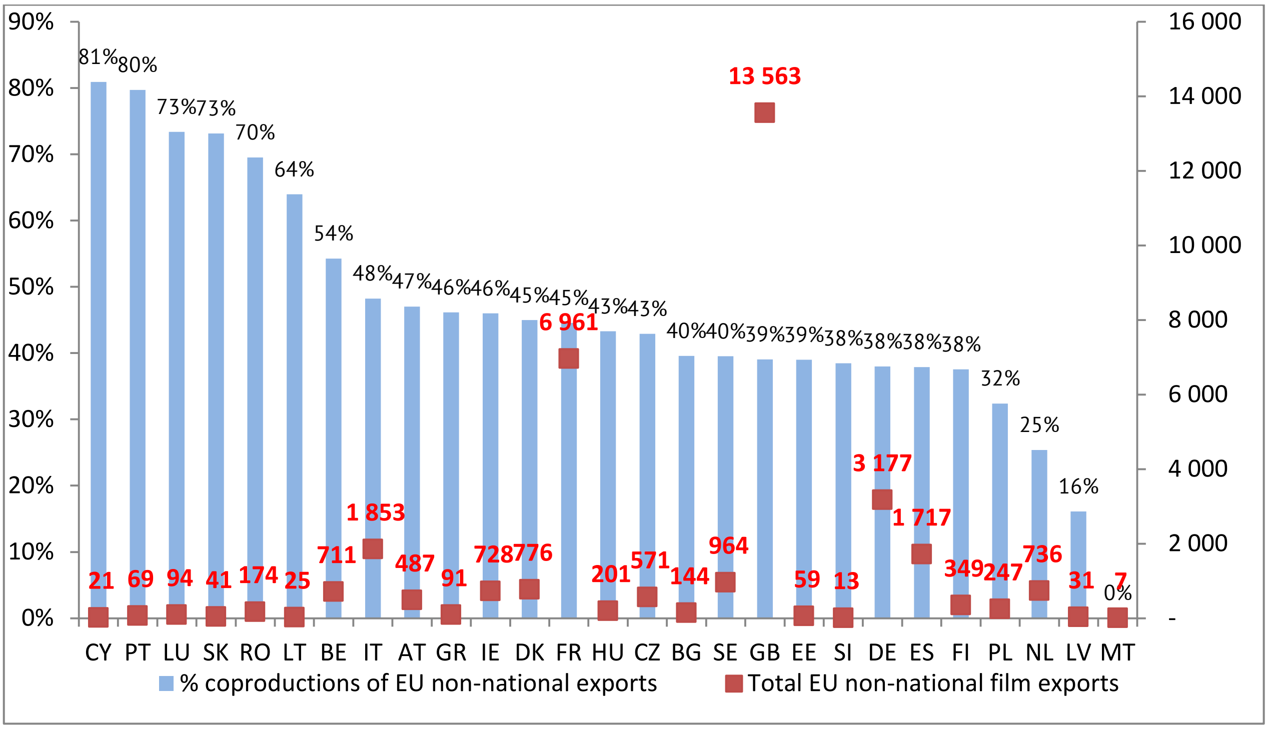
Even if co-productions did not represent the main share in TVOD catalogues for EU non-national films, they still travelled better than 100% national productions (compared to the average film production repartition between 100% national productions and co-productions).

Figure 40. TVOD - Share of co-productions and 100% national productions out of 33 810 EU non-national films, in % of total and units



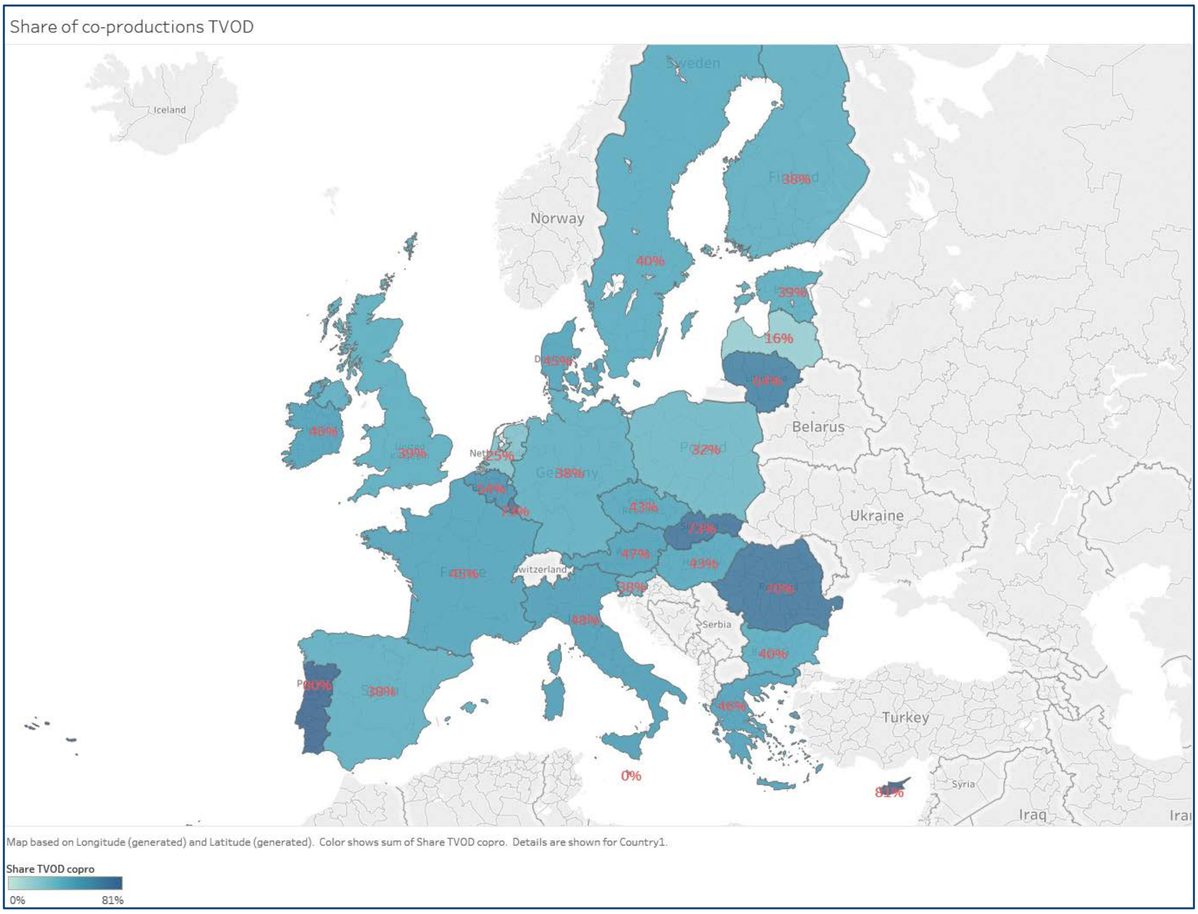
Source: OBS

Figure 41. TVOD – Co-productions share of film exports by country and total film exports by country, in % of total and units



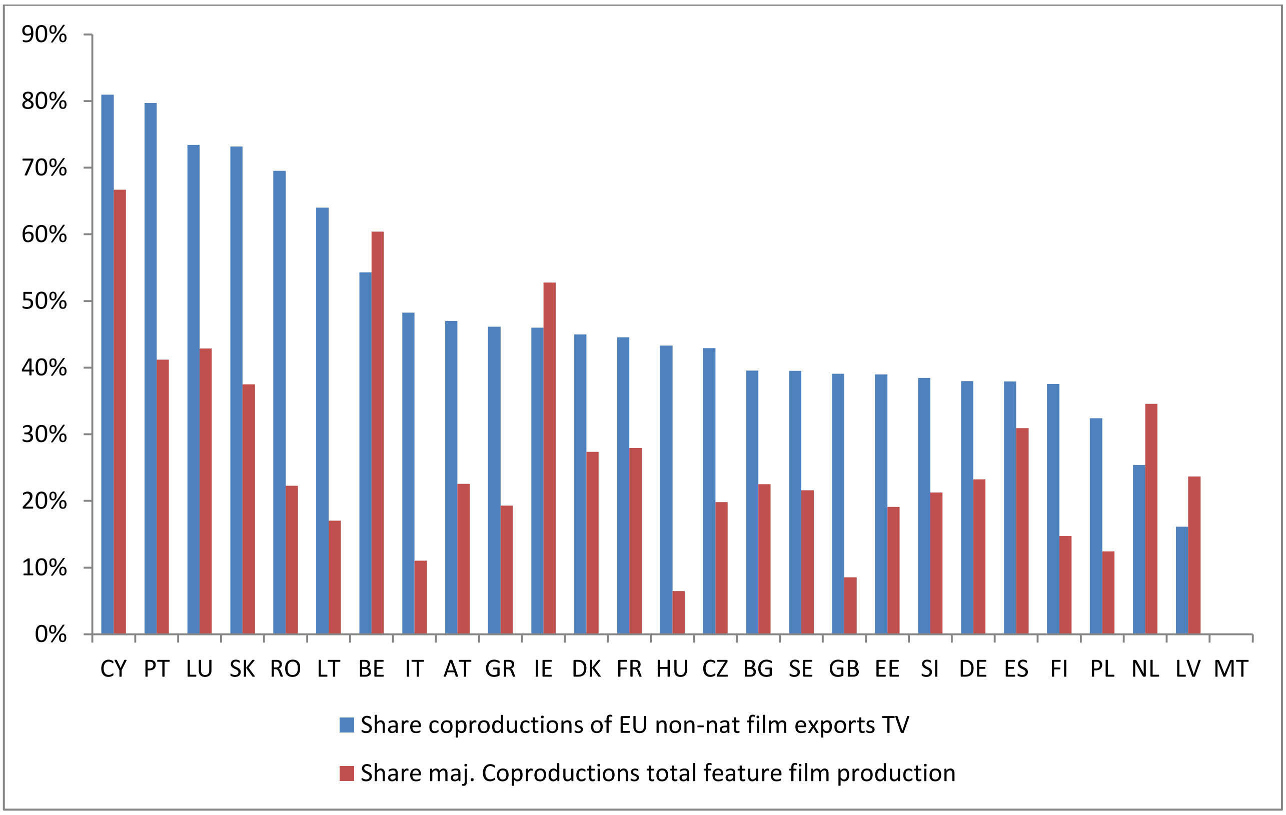
Source: OBS

Map 20 TVOD – Co-productions share of film exports by country



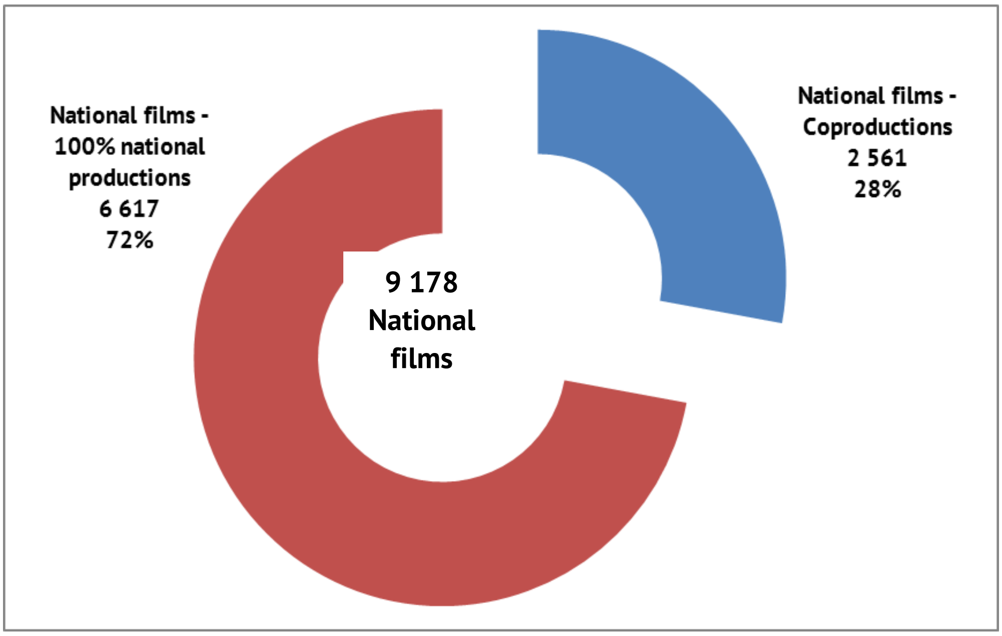
Source: OBS

Figure 42. **TVOD – Comparison: Co-productions share of total film exports and co-productions share of average feature film production by country, in % of totals**



Source: OBS, Yearbook 2016

Figure 43. **TVOD – Share of co-productions and 100% national productions out of national films only, in % of total and units**



Source: OBS

2.4. Wrap-up - A rule of thumb on the export of EU non-national films?

- The share of EU non-national films out of all films released, broadcasted or available varied between 15% (TV) and 31% (cinema).
- When only EU films are taken into consideration (EU non-national and national films), EU non-national films made up the biggest portion of EU films released, broadcasted or available, between 54% (TV) and 79% (TVOD).

- EU non-national film exports were correlated to the volume of film production; The EU-5, as the biggest producers of films in the EU, were also the biggest exporters of films intra-EU.
- A rule of thumb for EU non-national film exports? A total o 80% of films produced in the EU-5 and 20% for the remaining EU countries?
- Whereas the EU-5 accounted for only 65% of films produced in the EU on average, they exportedbetween 74% (cinema) and 88% (TV) of all EU non-national films.

In sections 2.2.2 to 2.2.4 the share of EU non-national films out of total film offerings for cinema, TV and TVOD was analysed in more depth, particulary with regard to the main export countries for EU non-national films.

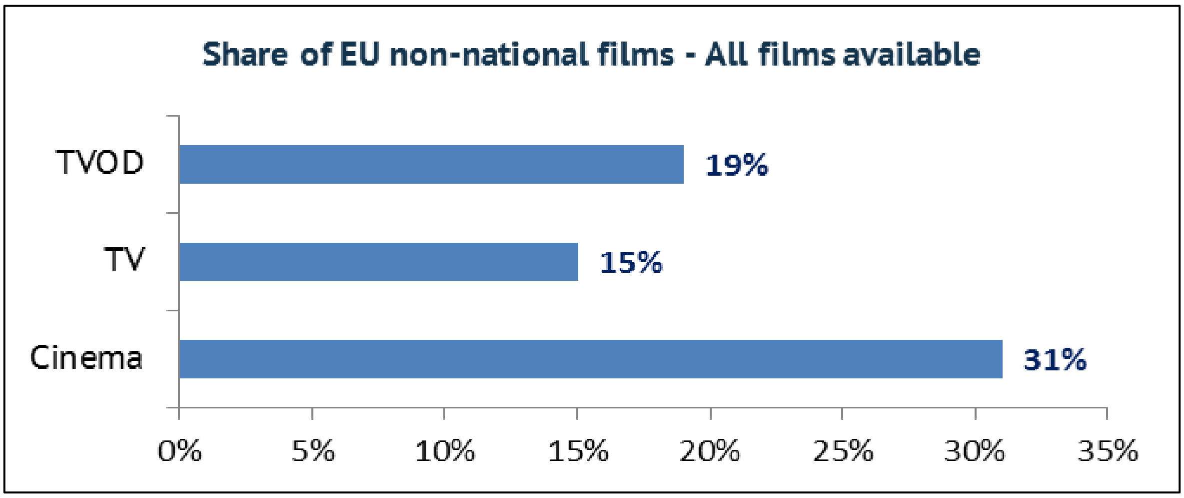
The data sets showed that for each distribution platform EU-5 countries, with the highest volume of feature film production on average per year, dominated the export of EU non-national films.

The importance of co-productions, for lower as well as higher volume film-producing countries, with regard to the export and thus circulation of EU non-national films, could also be inferred from the data sets, at least for films in cinemas and on TV.

It appears from the different data that co-productions made up, for most of the countries, the biggest portion of their EU non-national film exports, except for TVOD.

To sum up, when all films are considered, EU non-national films made up between 15% (TV) and 31% (cinema) of all films available / on release / broadcasted (see Figure 40). This data alone shows that - even if on a lower scale for TV and TVOD - EU non-national films did circulate (and were mainly co-productions). The lion’s share of all films on release / broadcasted / available went to international films, with 51% of international films in cinemas, 72% of international films on TV and 76% of international films on TVOD.

Figure 44. Share of EU non-national films – all films available in cinemas, on TV and TVOD, in % of total

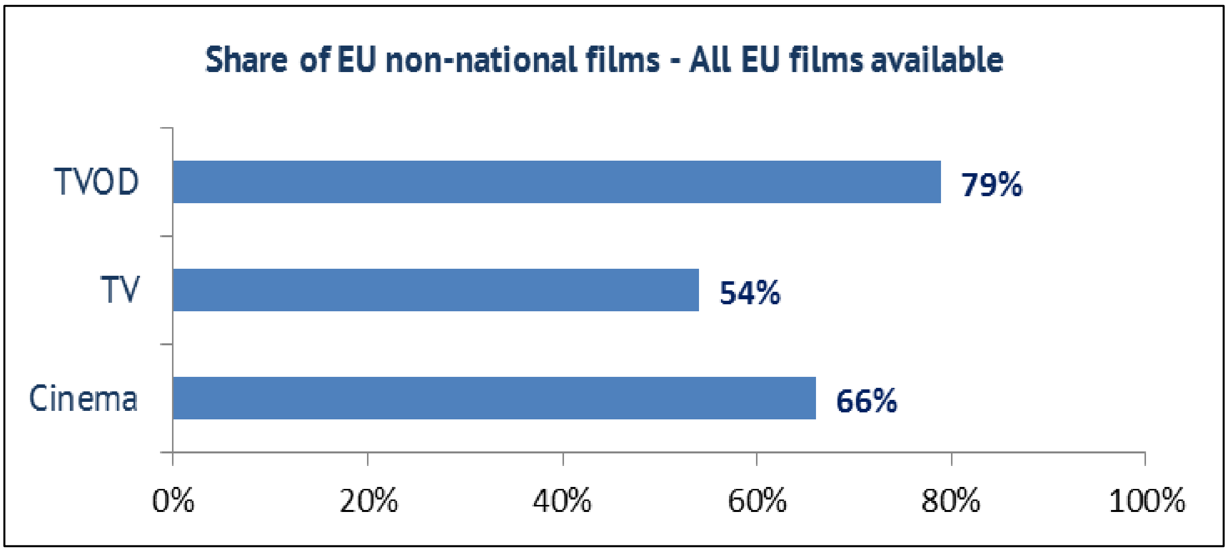


Source: OBS, LUMIERE, EurodataTV

In order to show the importance of EU non-national films, Figure 41 displays the share of EU non-national films when only EU films are considered (EU films are composed of national films, those films that did not circulate / were not exported, EU non-national films, and films that did circulate / were exported).

Here we are no longer looking only at exports but at the composition of the pan-European cinema, TV and TVOD market in terms of EU films. EU non-national films in this setting made up between 54% (TV) and 79% (TVOD) of EU films, so one could conclude that EU non-national films accounted for up the greater portion of EU films available throughout the EU. Of course, notable differences existed between countries, stemming from varying reliance on national production for EU film consumption, as Chapter 3 shows in more depth, and therefore for national film production volume.

Figure 45. Share of EU non-national films – only EU films in cinemas, on TV and TVOD, in % of total (national films and EU non-national films)



Source: OBS, LUMIERE, EurodataTV

But how is the export of EU non-national films related to the volume of national feature film production?

Figure 42 shows that while EU-5 countries accounted on average for 65% of the 1 596 films produced each year in the EU, they accounted for a higher share of the export of EU non-national films..

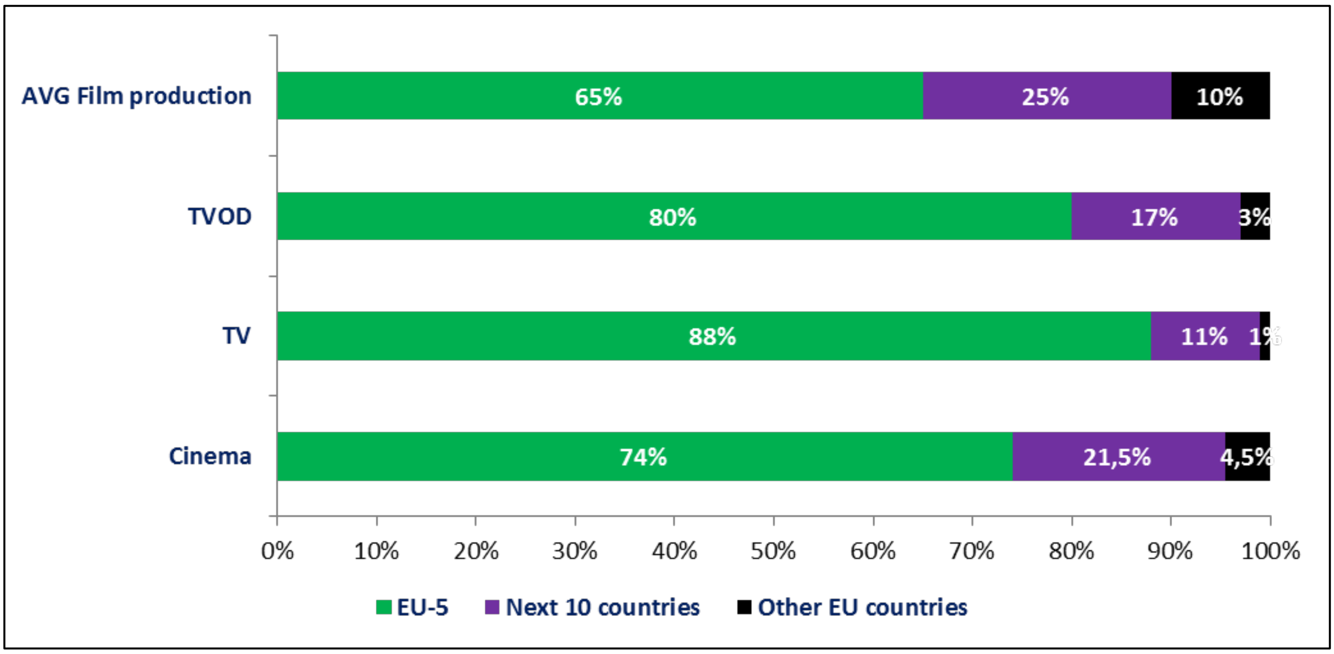
In cinemas, films produced by EU-5 countries accounted for 74% of all EU non-national exports, on TVOD for 80% and on TV for 88%. Relative to their production share (65% of total EU film output on average), these countries ‘outperformed’ when it came to intra-EU film export.

But does that necessarily mean that lower volume film-producing countries ‘underperformed’?

Maybe instead of only looking at shares and total volumes, it could be useful to compare the export of EU non-national films relative to the production volume for each country.

This is the topic of section 2.5 in which an efficiency ratio for EU non-national film exports is introduced in order to allow a comparison not only on volume but on the relative export performance in relation to film production volume.

Figure 46. Comparison between country clusters for film production, exports of EU non-national films in cinemas, on TV and TVOD, in % of total



Source: OBS, LUMIERE, Yearbook 2016, EurodataTV

Comparison of the 3 distribution methods for EU non-national films

- Total EU non-national films: Unsurprisingly, TVOD, with the greatest capacities, also claimed the largest number of EU non-national films, followed by TV and cinema. EU-5 countries dominated the export of intra-EU films, as exports are closely correlated to film production volume. Inside the EU-5 countries, French and British films made up the lion's share of all EU non-national films, with shares above 50% for all three distribution platforms.
- Single film titles: As with total EU non-national films, TVOD services and their much greater capacities claimed the highest number of film titles, at 8 973, followed by TV with 2 864 and cinema with 866 film titles. Here again, EU-5 titles, and especially French and British film titles, took the lion's share
- Average circulation: When a film was exported inside the EU, TVOD provided the widest circulation on average, with 3.7 countries, followed by cinemas with 2.9 countries and TV with 1.8 countries. This indicator also showed that whereas films tended to circulate more widely on TVOD and in cinemas, TV remained a space where audiences seemed to prefer national productions, big budget films and films with language and cultural proximity. TV was also the distribution platform where EU-5 films were the most concentrated at 88%, so almost nine films out of 10 broadcasted on EU TV channels were produced in the EU-5.
- Average reach: TVOD allowed films produced in most countries to potentially reach other EU countries, followed by distribution in cinemas and TV.
- Share of co-productions: EU non-national films were more likely to be co-productions for films in cinemas and on TV (by a narrow margin). For TVOD, 100% national productions were the most available films.

Table 14. Summary table of cinema, TV and TVOD for main indicators

	Cinema	TV	TVOD
Total EU non-national films	2 501	5 058	33 810
Single film titles	866	2 864	8 973
Average circulation	2,9	1,8	3,7
Average reach *(max.)*	15 *(24)*	9 *(17)*	22 *(25)*
Share of co-productions	55%	51%	41%

Source: LUMIERE, EurodataTV, OBS on EurodataTV, OBS

2.5. Volume is not all - Efficiency and relative export strengths: The export efficiency ratio

Volume is not the sole measure for film exports; relative export strength compared to production volume also matters.

When film exports are compared to film production volume, several smaller volume film-producing countries appear to be particulary efficient on EU non-national film exports.

When an export efficiency ratio is introduced, Belgian, Irish, Swedish and Danish films appear to have been efficiently exported to other EU countries.

On the other hand, Spanish and Italian films were, compared to their production volume, not as efficiently exported as films from smaller producer countries

Previous sections concentrated on the volume of exports, highlighting differences among country groups arising mainly from notable disparities in production volume. Co-productions however alleviated these differences for smaller volume film-producing countries, as co-productions tended to be exported more, relative to 100% national productions.

This section introduces a new way of measuring the **effiency of exports relative to film production volume.** This ratio, the "export efficiency ratio" (EER), is not a scientific measurement or a recognised method to evaluate film exports but in our opinion it helps to place EU non-national film exports in perspective. So how is the EER calculated? The ratio is calculated by dividing the total number of EU non-national film exports by average film production for a given country.

Schema 1 Export efficiency ratio

$$\text{Export Efficiency Ratio} = \boxed{\frac{\text{TOTAL FILM EXPORTS}}{\text{AVERAGE FILM PRODUCTION}}}$$

Source: OBS

- If the ratio > 1: The country exported more films in volume than its average film production per year. This situation, in the report, indicates an efficient film export country.

- If the ratio < 1: The country exported fewer films thanit produced; thus the intra-EU export of national films was less efficient, or not efficient.

These evaluations are of course subjective and are not meant to constitute an appraisal of any sort of a given film industry strategy or anything else. The ratio is only introduced to allow reasoning beyond the traditional comparison of volumes when it comes to film circulation and exports. The European Audiovisual Observatory does not see this ratio as an indicator to evaluate export results for national film industries.

Before a more in-depth presentation of the results for each distribution, the changes in the top five lists are telling.

In previous sections, EU-5 countries filled up all first 5 ranks, as volume was the sole indicator. Table 15 shows the changes in the top five places when the EER is introduced and the rankings of the countries when only volume was considered.

For EU non-national film exports in cinemas, four countries make their entry into the top list. Swedish, Belgian, Irish and Danish films appear to have been efficiently exported, more so than German, British, Italian and Spanish films, the top list holders in volume.

Only French films appear to have truly dominated cinema exports, in volume and in efficiency, which is not surprising as France is the country with the most cinemas and most admissions in the EU, and is the No. 2 country for film production.

For cinema, the EER shows that smaller volume-producing countries can actually be efficient in their exports. Belgian and Irish films were among the most co-produced in the EU; 60% of all Belgian films were co-productions, and this was the case for 53% of all Irish films. Sweden and Denmark co-produced on average 22% and 27% of their films, respectively, just above the EU average of 21%.

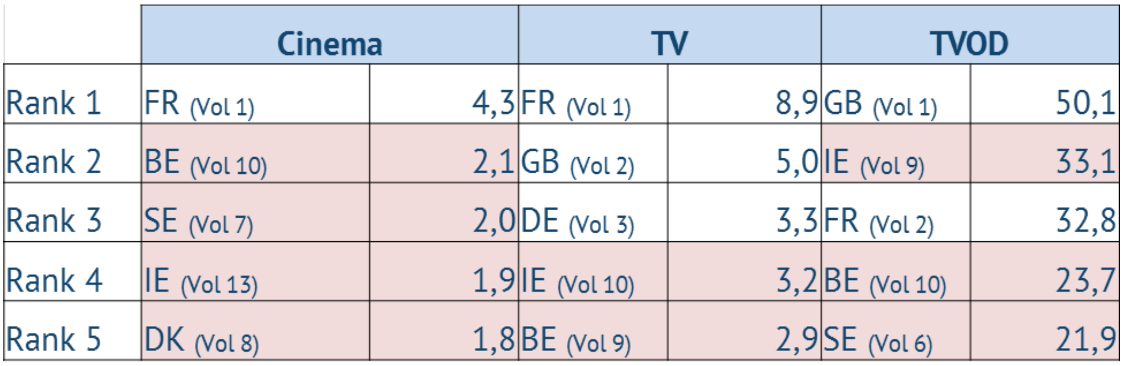
When it comes to TV the changes are less significant: Thetop three producing countries - France, the United Kingdom and Germany - were also efficient when it came to exporting their films into other countries for TV.

However, once again Belgian and Irish films entered the top five list, whereas by volume they were respectively ranked nine and 10. Again, did co-productions enhance the export of their films, and therefore render their export of EU non-national films efficient?

Surely, more than one factor was at play but when the changes in TVOD data are observed, it becomes clear that Irish, Belgian and Swedish films travelled well, or efficiently, be it in cinemas, on TV or on TVOD, compared to their volumes of film production.

Two high film-production volume countries, Spain and Italy, on the other hand, did not perform so efficienctly when it came to film exports.

Table 15. Changes in rankings when export efficiency ratio is introduced



	Cinema		TV		TVOD	
Rank 1	FR (Vol 1)	4,3	FR (Vol 1)	8,9	GB (Vol 1)	50,1
Rank 2	BE (Vol 10)	2,1	GB (Vol 2)	5,0	IE (Vol 9)	33,1
Rank 3	SE (Vol 7)	2,0	DE (Vol 3)	3,3	FR (Vol 2)	32,8
Rank 4	IE (Vol 13)	1,9	IE (Vol 10)	3,2	BE (Vol 10)	23,7
Rank 5	DK (Vol 8)	1,8	BE (Vol 9)	2,9	SE (Vol 6)	21,9

Source: OBS on LUMIERE, EurodataTV and Yearbook 2016

The following bullet points present the impact of the EER for each distribution platform.

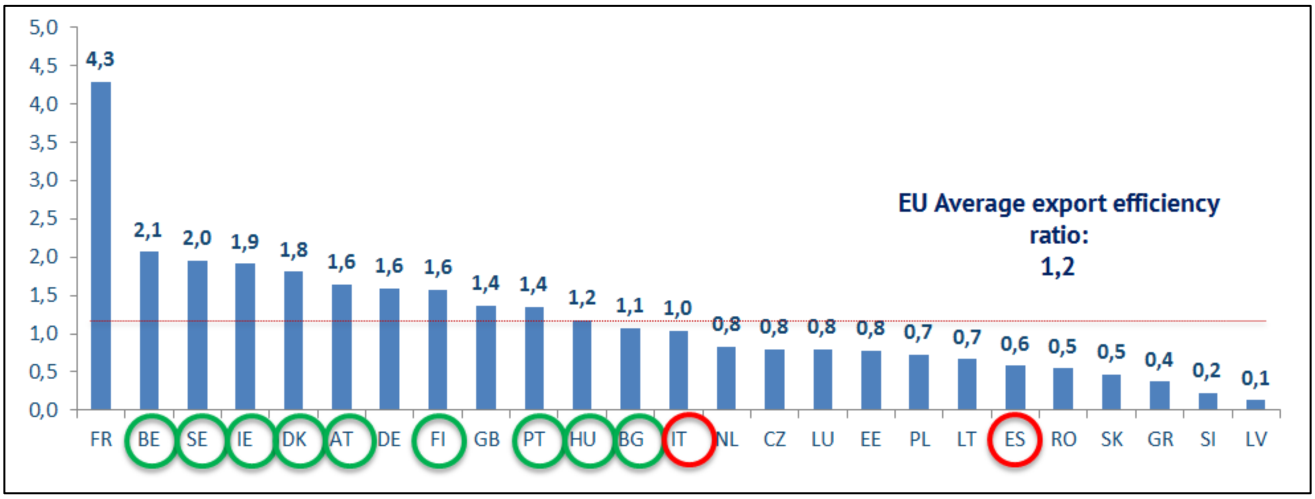
- Efficiency ratio for film exports in cinemas

As noted above, films produced in several low volume-producing countries were actually efficiently exported compared to the countries' yearly average film production.

These countries are BE, SE, IE, DK, AT, FI, PT, HU and BG. French films appear to be in a class of their own in cinemas, as France was the country of production with the highest volume of exports (see Figure 12) and also the most efficient.

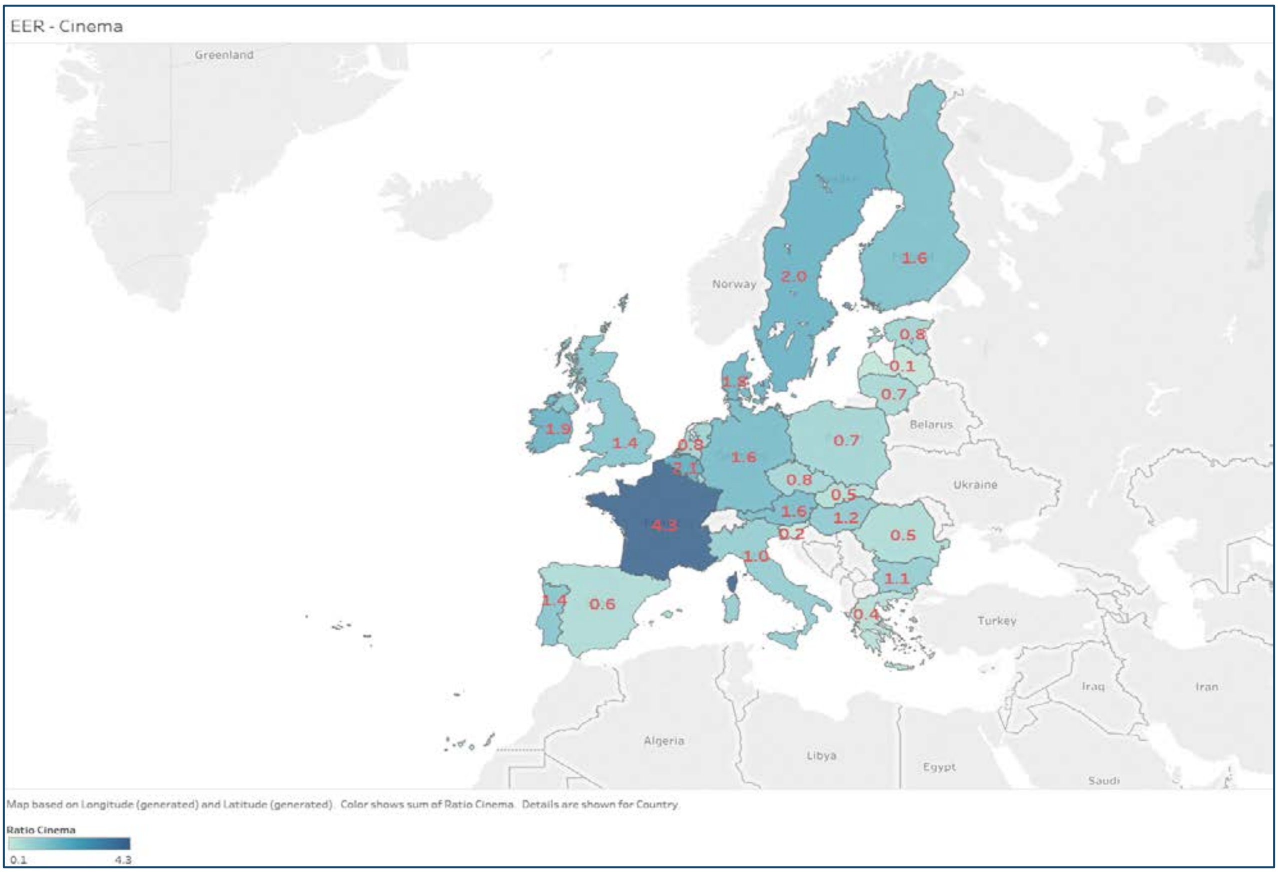
Italian and Spanish films, despite being produced in countries ranked in the top five for average film production volume (see Figure 1), were not so efficiently exported, with Spanish films appearing to underperform when it came to intra-EU exports.

Figure 47. Cinema - Export effiency ratio



Source: OBS on LUMIERE

Map 21 Cinema - Export effiency ratio



- Export efficiency ratio for film exports on TV

TV is the distribution platform where the EER shows the clearest cut between countries that managed to export films efficiently and those that did not. On TV, once again French films dominated when it came to the EER, as was the case in volume of film exports.

This could constitute a manifestation of the film value chain; a film, after having been screened in cinemas, makes its way to TV – pay TV, and commercial and public TV.

Since French films are those most exported to cinemas, their position in the TV exploitation ecosystem seems only logical.

Aside from French films, which decidedly appear to be in a class of their own on TV and in cinemas, seven other countries had an efficient export ratio: GB, DE, IE, BE, SE, IT and DK.

Their films were mostly produced in French or English (FR, BE, GB, IE, and even some films from the Nordics).

Spanish films once again appeared to suffer from a not so efficient export market for TV: The Spanish EER is below 1, as it was for films in cinemas.

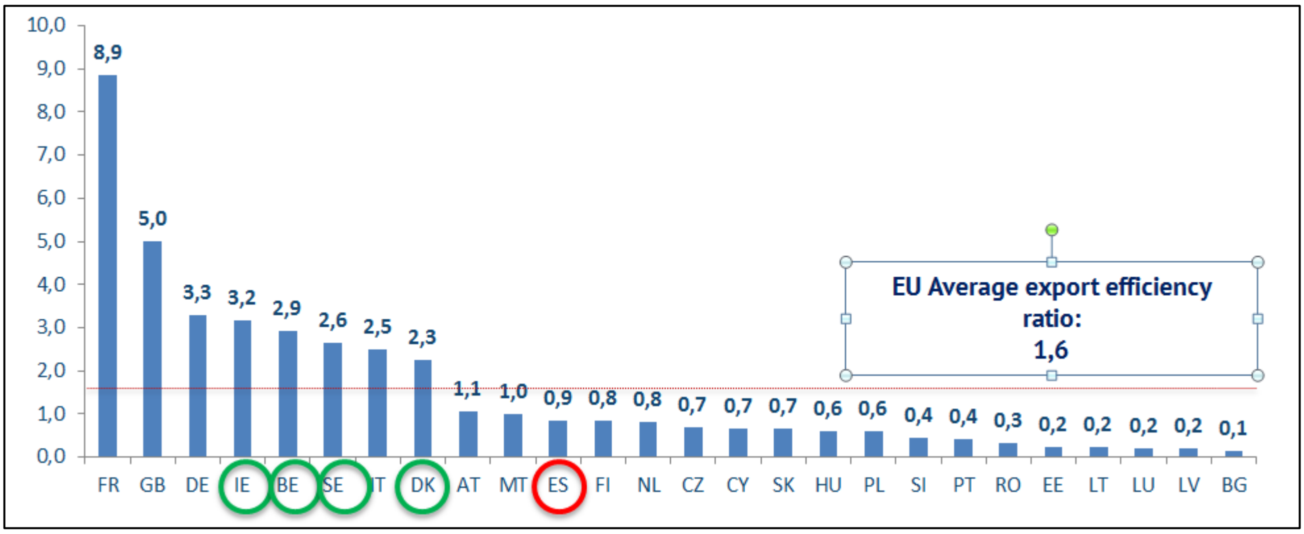
The TV export market appears to be much more difficult to access for films from smaller volume-producing countries, Spain aside.

TV is still a mass medium and audiences seem to prefer national productions or films that had a certain success in cinemas.

The TV market, at least when it comes to EU non-national film circulation, tended to be more concentrated on films produced in eight specific countries, and on national content.

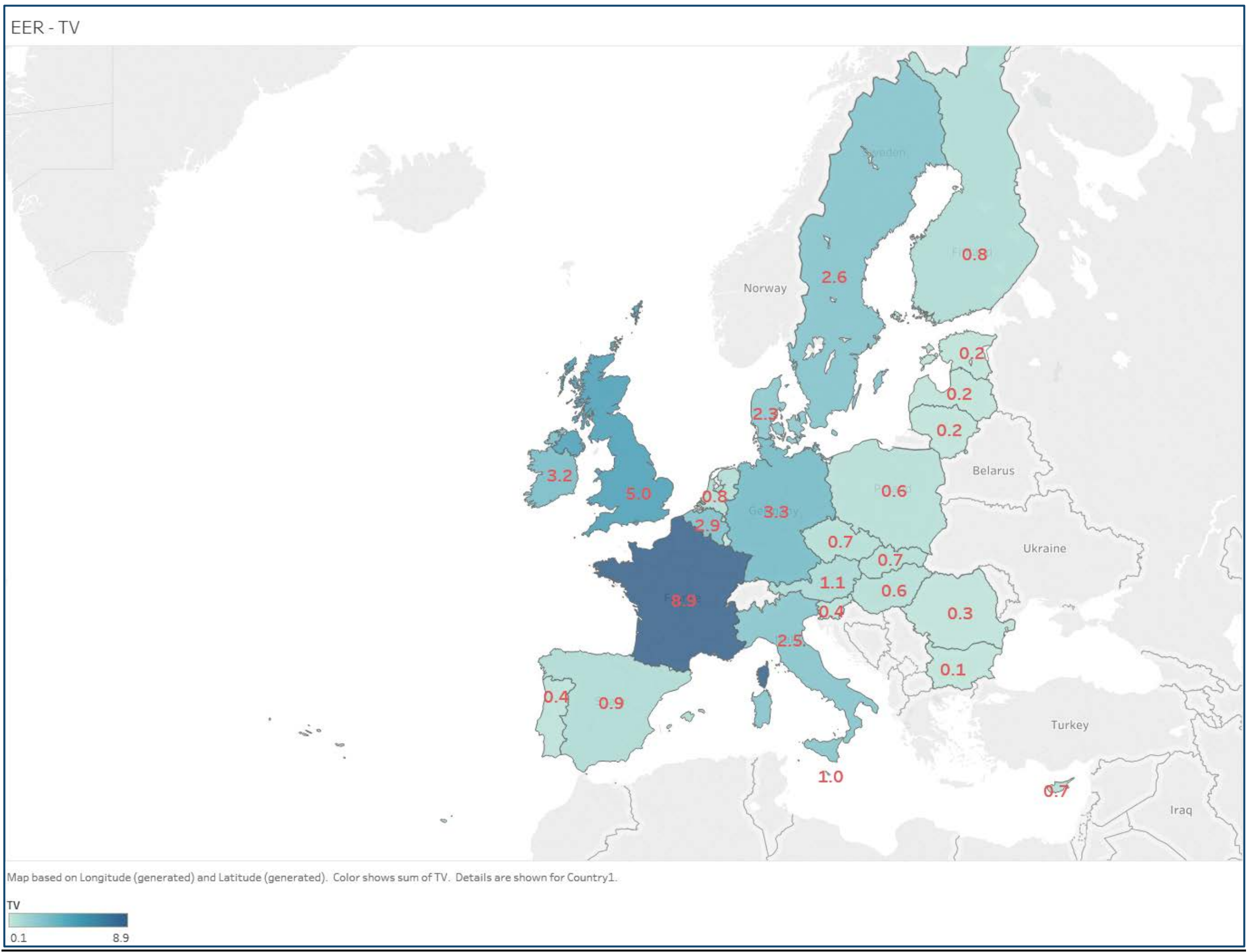
This is also the reason why 88% of film exports on TV were generated by the EU-5, the highest concentration among the three distribution methods.

Figure 48. TV - Export Effiency Ratio



Source: OBS on EurodataTV

Map 22 TV - Export Effiency Ratio



- Efficiency ratio for film exports on TVOD

As seenearlier, TVOD distribution allows for a much larger library and therefore number of films.

Also, TVOD allows films from each country to have a much greater reach than on TV and in cinemas (see Figure 47).

Here again, films produced in IE, BE, SE and DK performed quite well on the export front relative to film production volume.

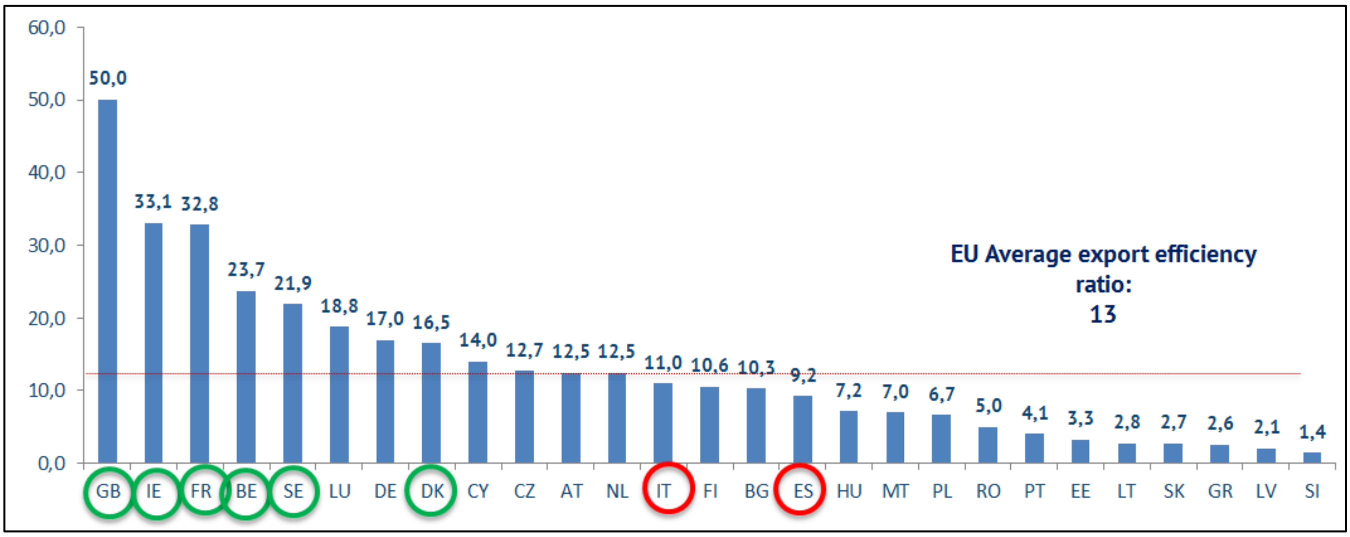
As TVOD offers more ‘room’ for films of every origin and as pan-European platforms such as iTunes tend to distribute films in several countries (once a title makes it to the service), the EER is quite highfor every country.

What does this mean? The sheer volume of films present on TVOD platforms allows efficient export.

In cinemas and, to a lesser degree, on TV, films are mostly recent; however on TVOD they can range between recent productions (after the films have been screened in cinemas) to classic or even heritage films (films with a production age above 20 years).

Therefore it is not easy to come up with a verdict; it can only be said that on TVOD even smaller volume-producing countries managed to export their films to other EU countries. However, films produced in the aforementioned countries (GB, IE, FR, BE, SE, DE, DK) outperformed those of other countries.

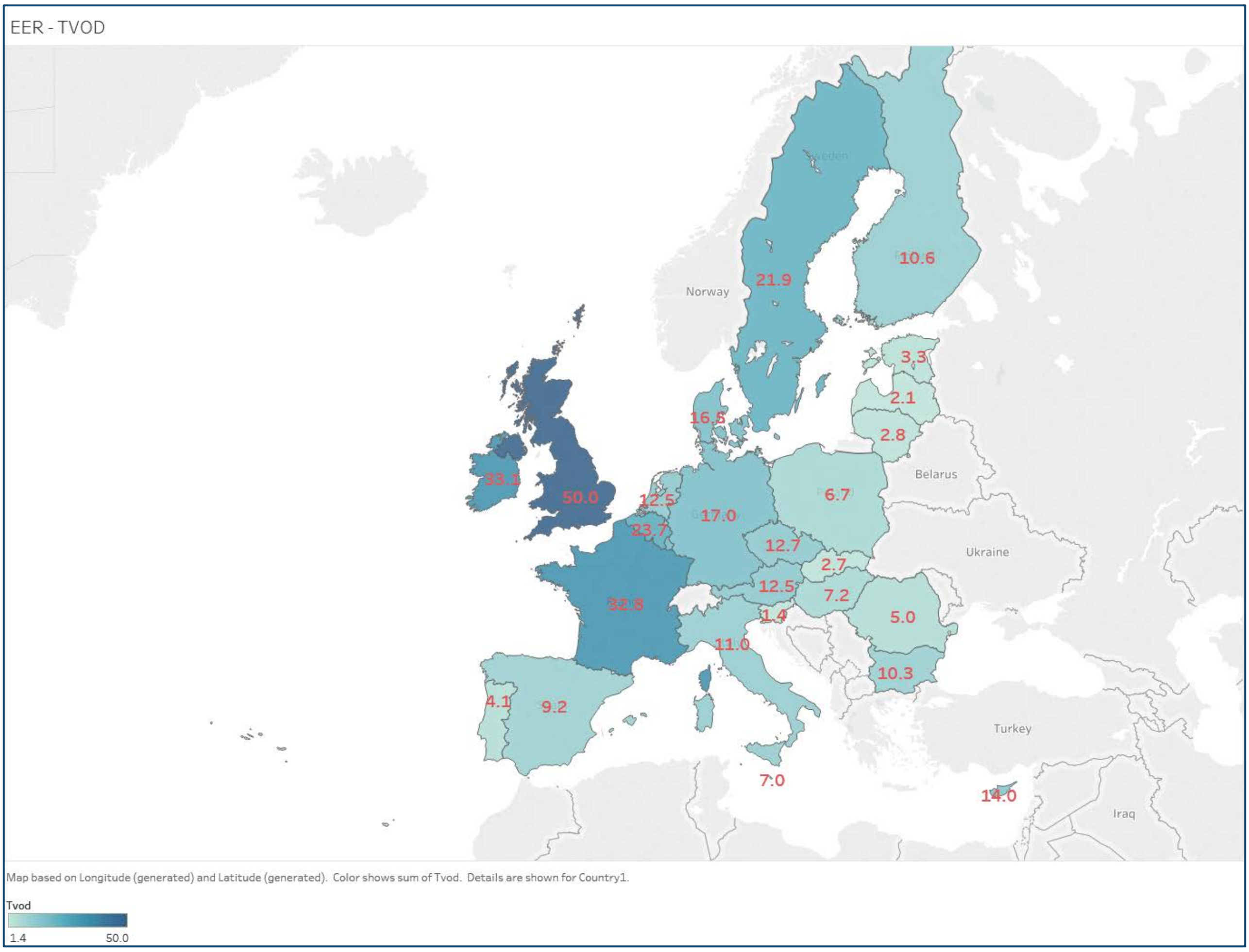
Figure 49. TVOD - Export effiency ratio



Source: OBS

Map 23 TVOD - Export effiency ratio

EER - TVOD



Map based on Longitude (generated) and Latitude (generated). Color shows sum of Tvod. Details are shown for Country1.

3. The import of EU non-national films

3.1. Executive summary - Key messages on the import of EU non-national films

The biggest importers of EU films were not only the biggest countries.

- In cinemas, on TV and on TVOD, several smaller countries were among the biggest importers of EU non-national films, such as Belgium, Poland, Hungary, Austria, the Netherlands or Ireland. EU-5 countries were also among the biggest importers of EU non-national films (see Sections 3.2.1 to 3.2.3).
- It is difficult to compare distribution platforms in absolute numbers as the quantities of films available varied considerably.

Co-productions played an important role for imports of EU films.

- As was the case for exports, co-productions also (logically) played a major role in imports (see Sections 3.2.1 to 3.2.3).
- Depending on the distribution platform, co-productions played a bigger role for several countries. However, this varied with distribution.

Distribution had an impact on EU non-national film imports.

- Cinema and TVOD were the distribution platforms on which EU non-national films had a higher share than national films, in general (see Section 0).
- TV was the distribution platform on which the share of EU non-national productions was the smallest, compared to total EU film offerings.

The level of national production impacted also the import of EU films and could well be the main indicator for EU non-national film imports on TV.

- A key factor that appears to underpin the import of EU non-national films is the level of national production(see Section 3.3).
- The share of national film out of total film offerings allows the identification of countries that relied more on their national production, and countries that relied more on the import of EU non-national films, for their EU film offerings.
- Results varied according to the distribution platform. France and the United Kingdom are the only countries for which national production was greater than EU non-national film imports on all three distribution platforms.
- The level of national production appears to be one of the main factors influencing EU non-national film imports, at least on TV where audiences / TV channels prefer national and / or culturally close content, or films with commercial success.

Clusters of countries according to their share of total EU films and share of national films can be established in order to regroup countries.

- Countries can be regrouped according to their film offerings and this for two ratios: the ratio of national films to total EU films (on release, broadcasted or available) and the ratio of EU films to total film offerings (see Section 3.4).
- Four broad categories of country groups can be established according to these two ratios and countries regrouped into clusters.

3.2. EU non-national film imports by country

3.2.1. EU non-national film imports in cinemas

Insights:

Smaller volume-producing countries, such as the Netherlands, Austria, Portugal, Beglium, Poland and Hungary, were among the biggest importers of EU films in cinemas(see Figure 49).

France was not only the biggest exporter of EU non-national films but also the biggest importer. This stemmed from the fact that France is the country with the most cinema screens and also with the highest admission count in Europe.

On average, each country imported 100 EU films. For cinema, the disparaties between big and small importers were less marked than for the other two distribution methods.

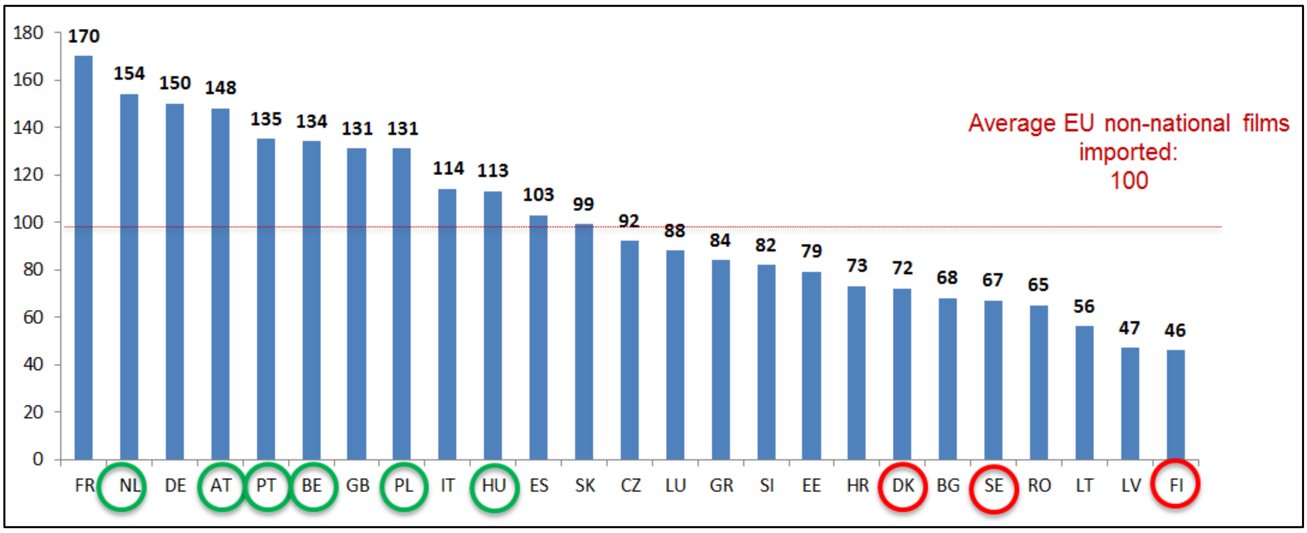
The Nordics, Bulgaria, Romania, Lithuania and Latvia were at the other end of the spectrum, with the lowest imports of EU films.

Co-productions made up the majority of EU non-national film imports, except in the case of Luxembourg, Belgium and Hungary (see Figure 50).

The import matrices, Matrix 7 and Matrix 8, show that French, British and German films were the films most imported on EU markets (which is no surprise, as the data had already indicated that these countries were the biggest exporters).

The impact of language and cultural proximity can also be seen for some countries such as Belgium/Netherlands, Czech Republic/Slovak Republic, United Kingdom/Ireland and Germany/Austria.

Figure 50. Cinema - Total number of EU non-national films imported by country, in units



Source: LUMIERE

Map 24 Cinema - Total number of EU non-national films imported by country, in units

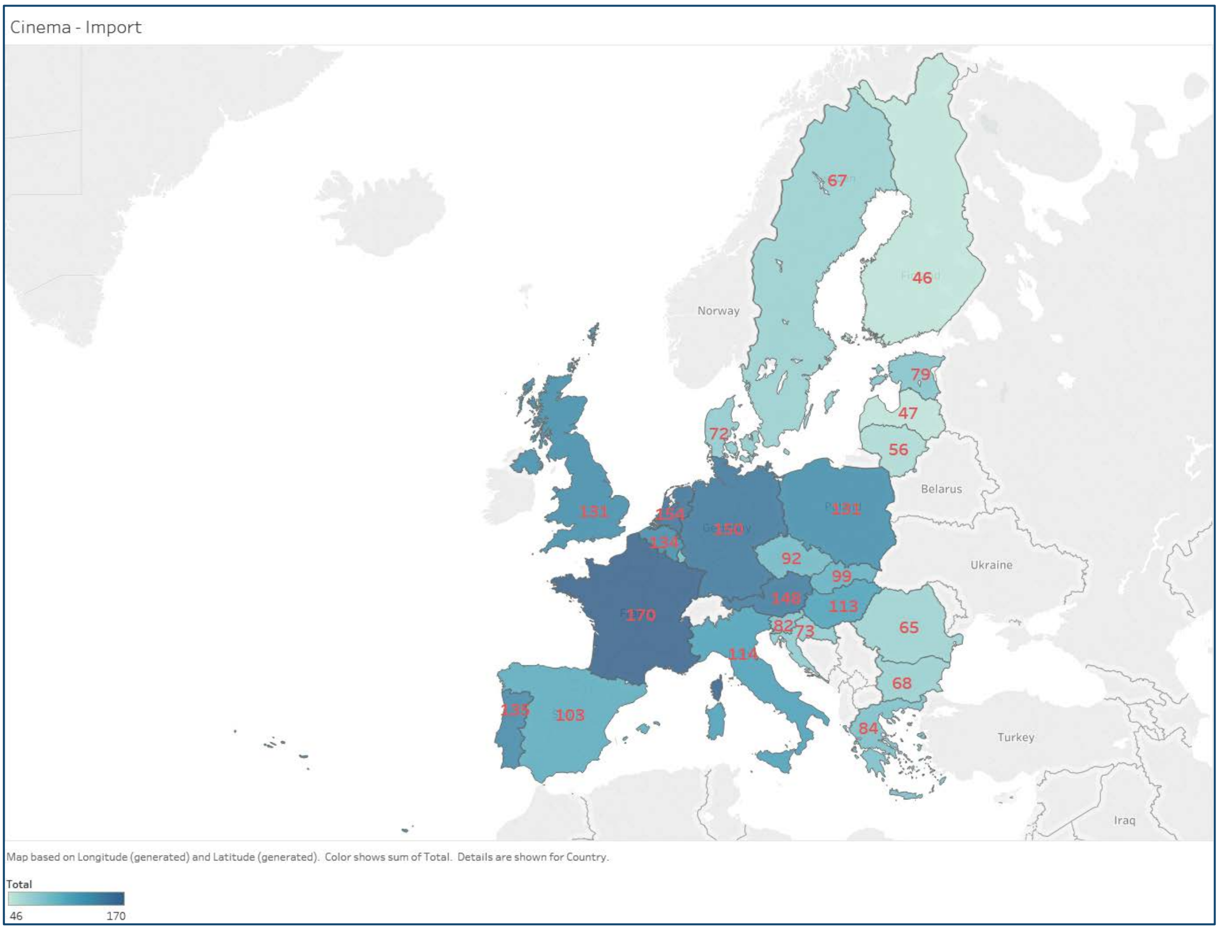
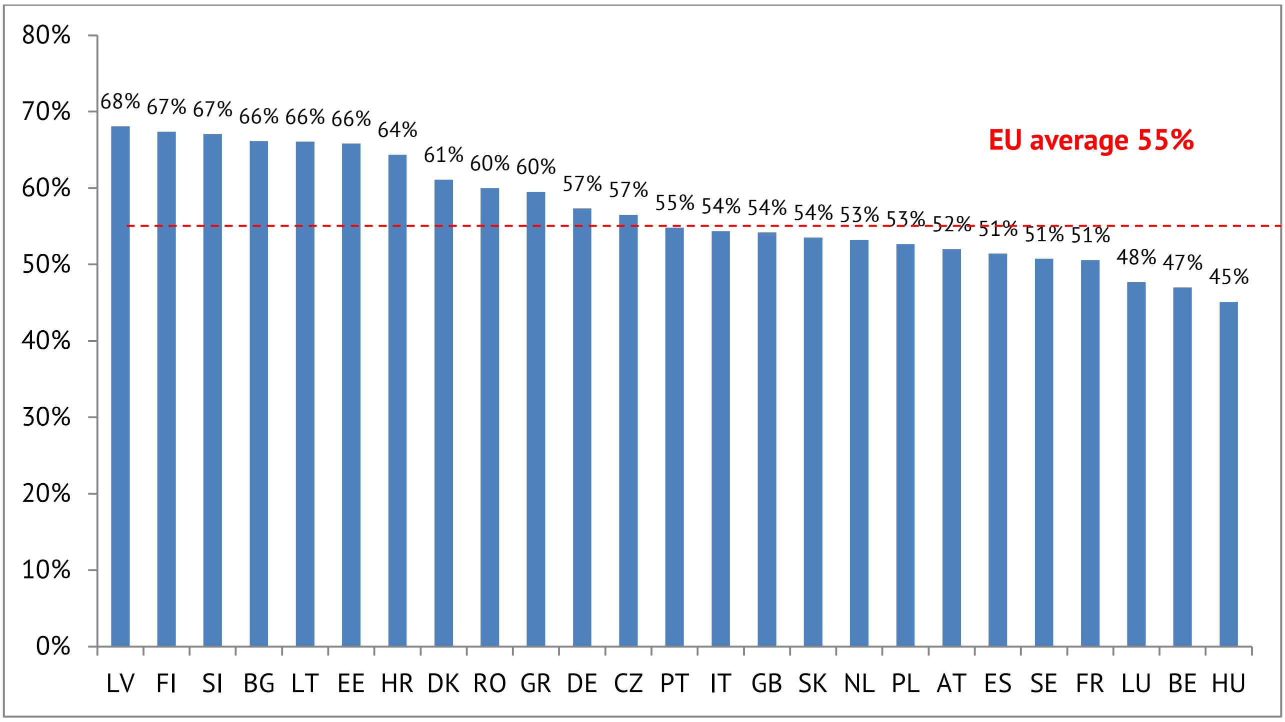
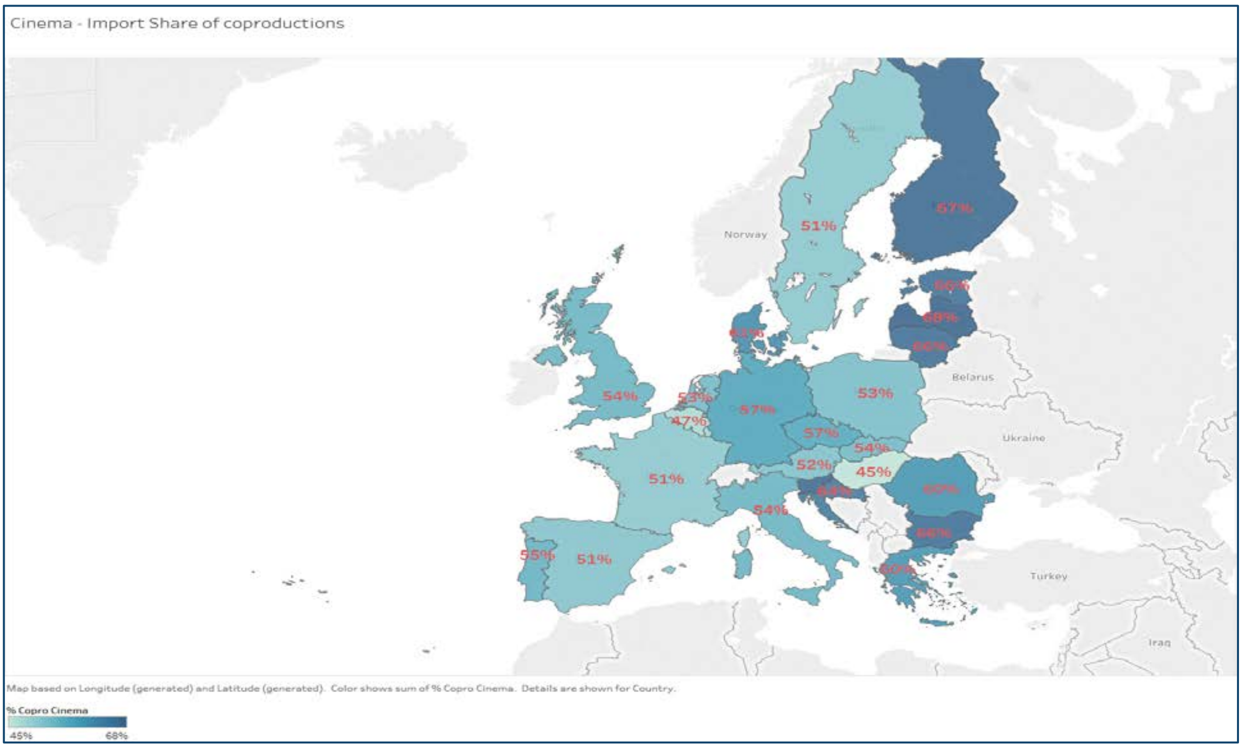


Figure 51. Cinema - Share of co-production out of EU non-national film imports, in % of total imports



Source: LUMIERE

Map 25 Cinema - Share of co-production out of EU non-national film imports



Matrix 7 Cinema– Import matrix 2015/2016, in units for imports per country and total imports

COUNTRY OF EXPORT

COUNTRY OF IMPORT

	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	TOTAL IMPORT NON-NATIONAL EU FILMS
AT		2				61	4		5	3	38	15	1		1	1	9					1	1	3		3			148
BE	2					6	2		3	2	85	11			1	2	6		1			8		3		2			134
BG	1	2			1	10	3	2	6	2	20	6			1	1	4						1		3	5			68
CY																													n/a
CZ	4	1				11	2		2	3	32	17			2	1	4					1	1		3	3		5	92
DE	10	5	1				8		6	5	45	27	4		2	2	11	1	1			8	7	1		5		1	150
DK	3	1				6		2	2		27	16	1		1	1	4	1				1	2			4			72
EE	3	1	1			5	4		1	6	28	13			1		5			2		4		3		2			79
ES		4	1			16	6	1			38	16			1	3	9	1				2	2			3			103
FI						7	2	2	3		14	7			1		2					1	1			6			46
FR	6	9	1		9	23	6	2	11	3		39	1		2	2	35	1	1			3		5	3	7	1		170
GB	4	3	1			13	6	2	6	3	54		1		3	13	10					2	2	2	1	5			131
GR	2		1			7	1		6		42	14			1		8									2			84
HR	3	2	1			11	4		5	2	24	9			1	1	5						1		1	2	1		73
HU	4	1	1			12	5		5		46	19				2	7		1			3	1		2	4			113
IE																													n/a
IT	2	2	1			17	4		7	1	42	24	1		2	2						3	2			4			114
LT		2	1			11		1	2	2	20	13					1					1				2			56
LU	1					4	1		2	1	60	8			1	2	3							3		2			88
LV	1		1			4	2		1	3	18	10			1		4					1				1			47
MT																													n/a
NL	4	16	1		1	14	7		7	2	58	24	2		1	3	9	1					1			3			154
PL	2	2	1		1	15	7		8	4	44	17	1		4	1	7					6			2	8		1	131
PT	5	1	1			13	1	1	7	3	58	26			1	1	11					2	1			3			135
RO	1	2				6	3		2	1	34	7			1		3					1	1			3			65
SE	2					8	2	1	3	2	28	13			1	2	3						1		1				67
SI	1	4	1		1	8	2		5	2	25	9	1		1	1	9	1				1	1	3	2	4			82
SK	3	2			23	9	3		3	2	29	11			2	1	6						1		1	3			99

Source: OBS on LUMIERE

Matrix 8 Cinema– Import matrix 2015/2016, in % of total imports for each country and units for total imports

	COUNTRY OF EXPORT																											
COUNTRY OF IMPORT	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	TOTAL IMPORT NON-NATIONAL EU FILMS
AT		1%				41%	3%		3%	2%	26%	10%	1%	0%	1%	1%	6%					1%	1%	2%		2%			**148**
BE	1%					4%	1%		2%	1%	63%	8%		0%	1%	1%	4%		1%			6%		2%		1%			**134**
BG	1%	3%			1%	15%	4%	3%	9%	3%	29%	9%		0%	1%	1%	6%						1%		4%	7%			**68**
CY														0%															**n/a**
CZ	4%	1%				12%	2%		2%	3%	35%	18%		0%	2%	1%	4%					1%	1%		3%	3%		5%	**92**
DE	7%	3%	1%				5%		4%	3%	30%	18%	3%	0%	1%	1%	7%	1%	1%			5%	5%	1%		3%		1%	**150**
DK	4%	1%				8%		3%	3%		38%	22%	1%	0%	1%	1%	6%	1%				1%	3%			6%			**72**
EE	4%	1%	1%			6%	5%		1%	8%	35%	16%		0%	1%		6%			3%		5%		4%		3%			**79**
ES		4%	1%			16%	6%	1%			37%	16%		0%	1%	3%	9%	1%				2%	2%			3%			**103**
FI						15%	4%	4%	7%		30%	15%		0%	2%		4%					2%	2%			13%			**46**
FR	4%	5%	1%		5%	14%	4%	1%	6%	2%		23%	1%	0%	1%	1%	21%	1%	1%			2%		3%	2%	4%	1%		**170**
GB	3%	2%	1%			10%	5%	2%	5%	2%	41%		1%	0%	2%	10%	8%					2%	2%	2%	1%	4%			**131**
GR	2%		1%			8%	1%		7%		50%	17%		0%	1%		10%									2%			**84**
HR	4%	3%	1%			15%	5%		7%	3%	33%	12%		0%	1%	1%	7%						1%		1%	3%	1%		**73**
HU	4%	1%	1%			11%	4%		4%		41%	17%		0%		2%	6%		1%			3%	1%		2%	4%			**113**
IE														0%															**n/a**
IT	2%	2%	1%			15%	4%		6%	1%	37%	21%	1%	0%	2%	2%						3%	2%			4%			**114**
LT		4%	2%			20%		2%	4%	4%	36%	23%		0%			2%					2%				4%			**56**
LU	1%					5%	1%		2%	1%	68%	9%		0%	1%	2%	3%							3%		2%			**88**
LV	2%		2%			9%	4%		2%	6%	38%	21%		0%	2%		9%					2%				2%			**47**
MT														0%															**n/a**
NL	3%	10%	1%		1%	9%	5%		5%	1%	38%	16%	1%	0%	1%	2%	6%	1%					1%			2%			**154**
PL	2%	2%	1%		1%	11%	5%		6%	3%	34%	13%	1%	0%	3%	1%	5%					5%			2%	6%		1%	**131**
PT	4%	1%	1%			10%	1%	1%	5%	2%	43%	19%		0%	1%	1%	8%					1%	1%			2%			**135**
RO	2%	3%				9%	5%		3%	2%	52%	11%		0%	2%		5%					2%	2%			5%			**65**
SE	3%					12%	3%	1%	4%	3%	42%	19%		0%	1%	3%	4%						1%		1%				**67**
SI	1%	5%	1%		1%	10%	2%		6%	2%	30%	11%	1%	0%	1%	1%	11%	1%				1%	1%	4%	2%	5%			**82**
SK	3%	2%			23%	9%	3%		3%	2%	29%	11%		0%	2%	1%	6%						1%		1%	3%			**99**

Source: OBS on Lumiere

3.2.2. EU non-national film imports on TV

Insights:

For films on TV, the disparaties were very large: on one hand Poland, Belgium and Germany, with more than 500 EU non-national film imports; on the other, Sweden, Ireland and Finland, with fewer than 104 films (see Figure 51).

France and the United Kingdom imported fewer films than the EU average, showing that some large producing countries rely more on their national production for EU films.

This shows that for films on TV, several countries rely either on international films or their national production.

The EU average of 280 EU non-national film imports shows the disparites between countries, with 12 countries or 2/3 of our data set below the EU average.

On TV, Poland emerged as the biggest importer of EU films, with 663 EU non-national films, closely followed by Belgium with 580 films.

For 10 out of 18 countries, co-productions accounted for the majority share of their EU non-national film imports(see Figure 52).

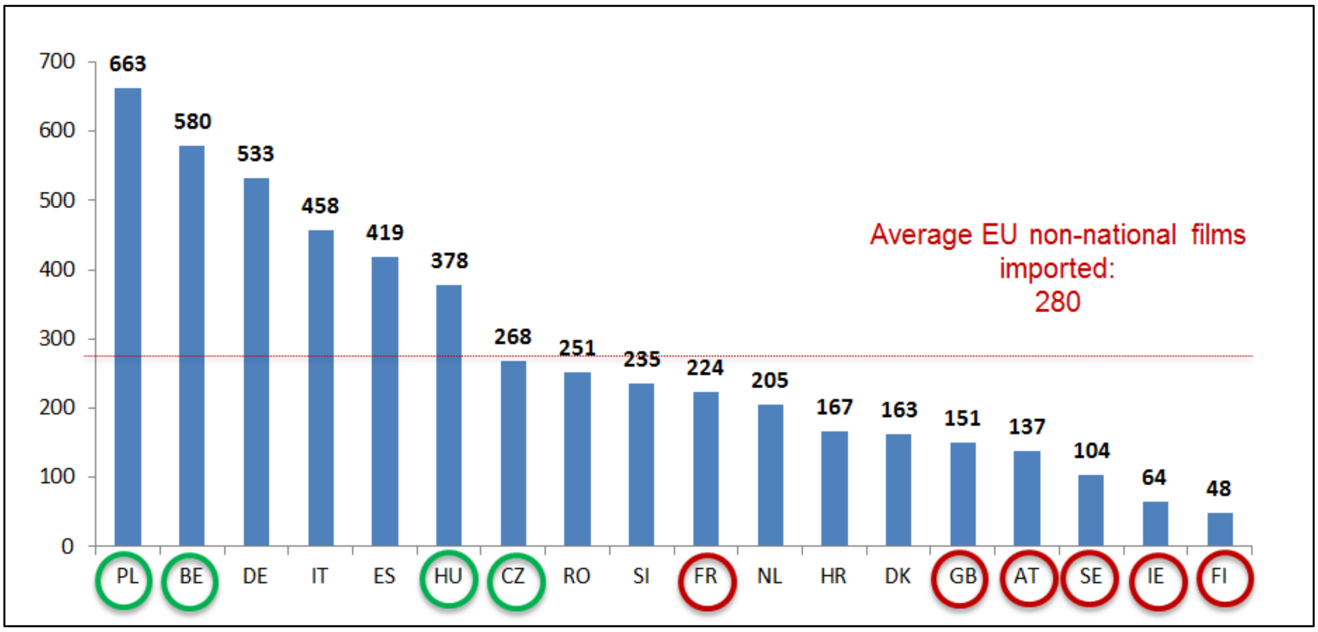
Except for Spain, all high-volume film-producing countries relied more on co-productions for their EU non-national film offerings.

The import matrices, Matrix 9 and Matrix 10, show again that most countries imported their EU non-national films mainly from France, the United Kingdom and Germany.

A slight impact of language/cultural proximity can be seen for films on Danish TV channels (3rd source is Sweden) or Ireland (62.5% of EU non-national films on Irish TV came from the United Kingdom)

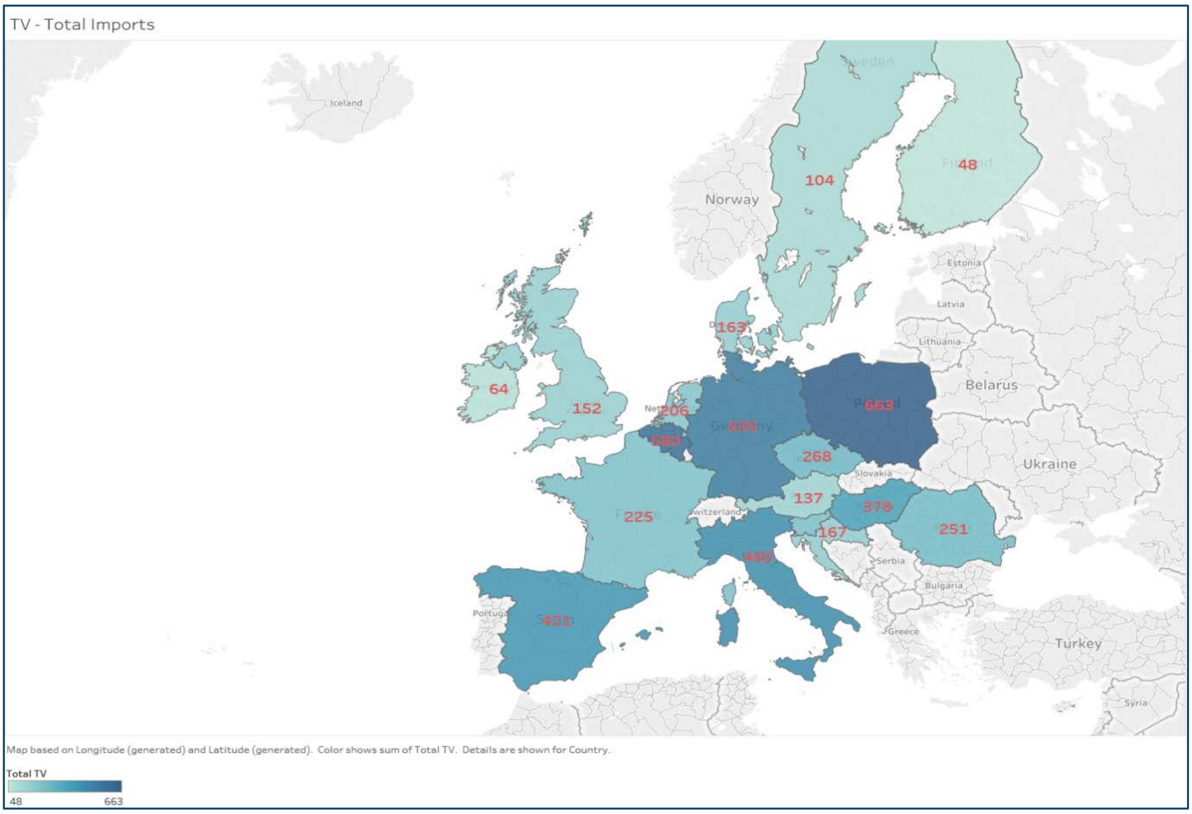
However, TV appears to be the medium where films produced in EU-5 countries were preferred by broadcasters.

Figure 52. TV - Total number of EU non-national films imported by country, in units



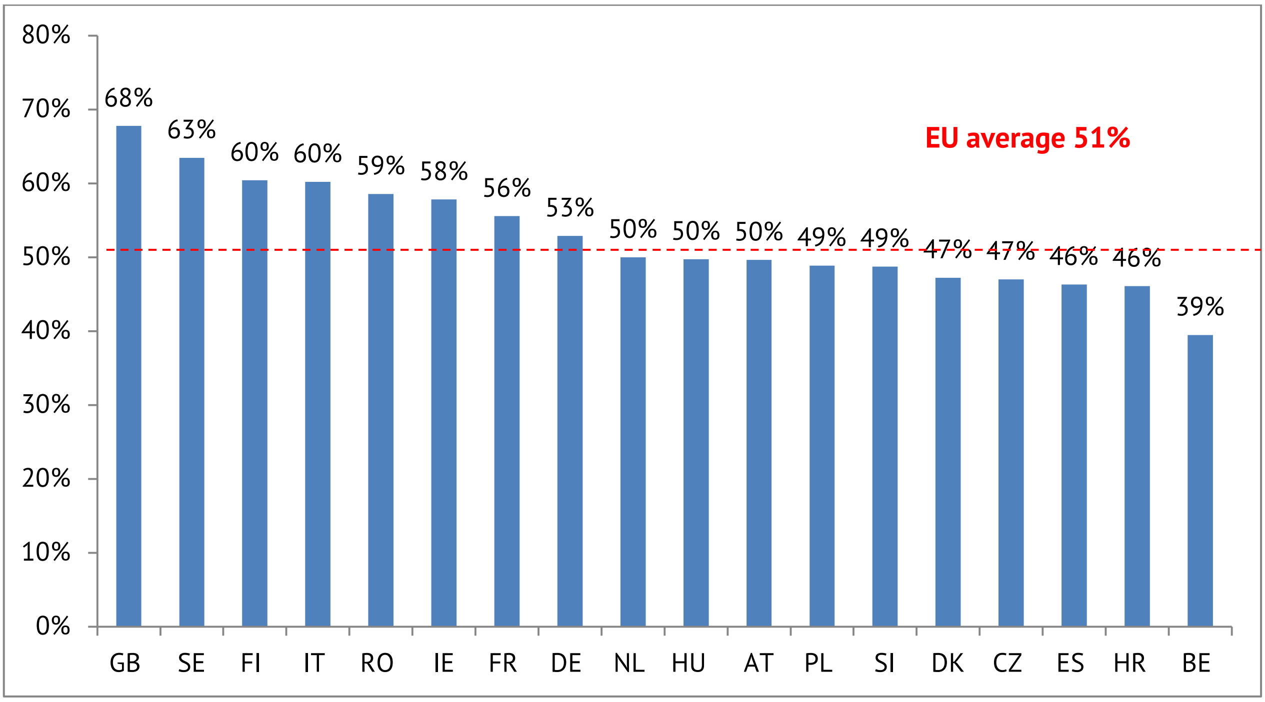
Source: OBS on EurodataTV

Map 26 TV - Total number of EU non-national films imported by country, in units



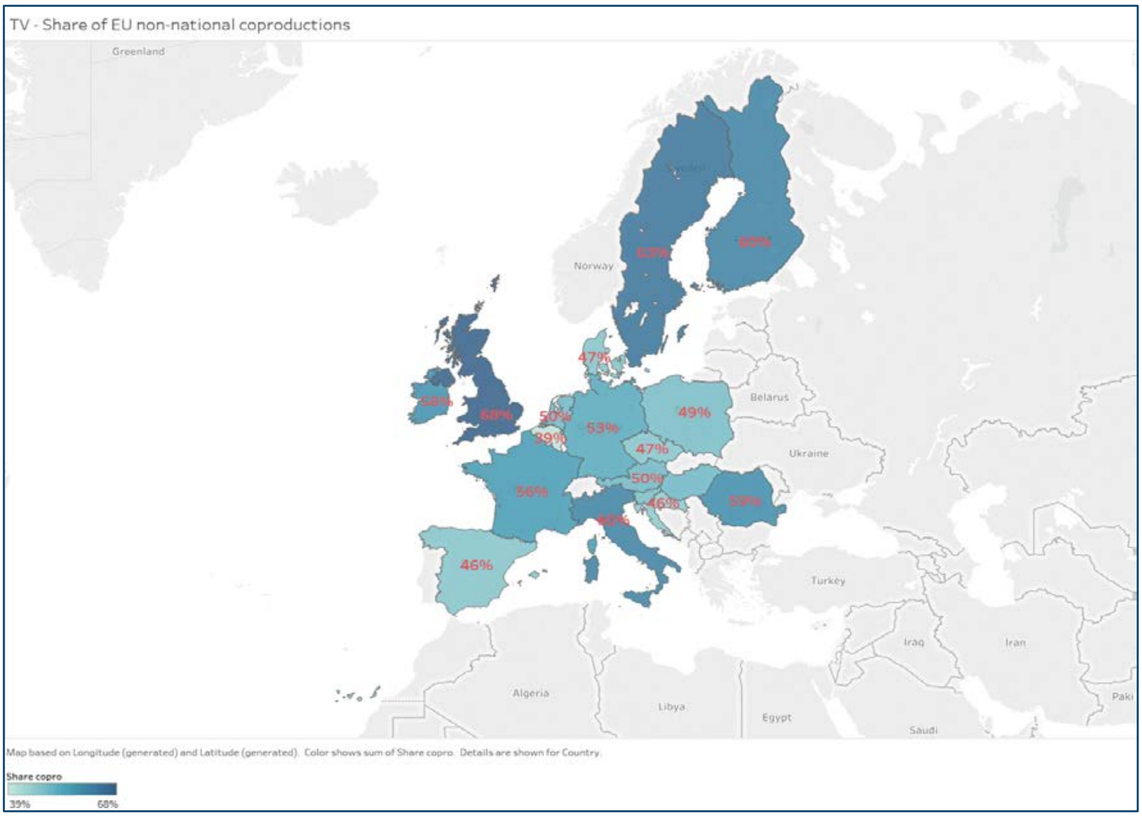
Map based on Longitude (generated) and Latitude (generated). Color shows sum of Total TV. Details are shown for Country.

Figure 53. TV – Share of co-production out of EU non-national film imports, in % of total imports



Source: OBS on EurodataTV

Map 27 TV – Share of co-production out of EU non-national film imports, in % of total imports



Matrix 9 TV – Import matrix 2015/2016, in units for imports per country and total imports

COUNTRY OF IMPORT

	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	Total import EU non-national films
AT		2			1	60	1		3	1	29	28			1	11												**137**
BE	1					21	8		10		409	97			5	12					14				3			**580**
CZ						61	3		4		117	55			2	13						1	1		6		5	**268**
DE	10	12			7		13		15	3	236	144	2	2	7	48			1		10	1		1	21	2		**535**
DK		2				6			8		42	78		1	3	7									16			**163**
ES	3	2			1	120	2			1	105	76	2	1	4	93						1	1	2	7			**421**
FI	1	1			1	4	1	2	1		12	21			2	1									1			**48**
FR	4	10				49	11	2	10	4		78	1		6	40						1	1	1	6	1		**225**
GB	3	8			2	15	7		16		69		1	1	10	11					2	1		1	5			**152**
HR	1	1	1		2	27	2		8		33	69			4	11						1			6		1	**167**
HU	3	4	1		1	40	4		12	2	131	92			4	75					4	1		1	3			**378**
IE						1	5		1		7	40		1		3					1	1			3		1	**64**
IT	2	7			1	38	7		25	2	209	148	2	3	2				1		4	1	1		6	1		**460**
NL	1	16			1	40	12		4	4	48	58	1	2	4	2									13			**206**
PL	8	16		1	9	92	16		27	4	223	205		4	9	24	2	1		1	2		2	4	11		2	**663**
RO		1				13	2		5		102	62		1	4	54					3	1	1		2			**251**
SI	4	5			5	19	5		10	4	75	64	1	1	2	13			1		7	11		1	7		1	**236**
SE		1				8	7		1	3	33	42			1	6					1	1						**104**

Source: OBS on EurodataTV

Matrix 10 TV – Import matrix 2015/2016, in % of total imports for each country and units for total imports

COUNTRY OF IMPORT	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	Total import EU non-national films
AT		1%			1%	44%	1%		2%	1%	21%	20%			1%	8%												**137**
BE	0%					4%	1%		2%		71%	17%			1%	2%					2%				1%			**580**
CZ						23%	1%		1%		44%	21%			1%	5%						0%	0%		2%		2%	**268**
DE	2%	2%			1%		2%		3%	1%	44%	27%	0%	0%	1%	9%			0%		2%	0%		0%	4%	0%		**535**
DK		1%				4%			5%		26%	48%		1%	2%	4%									10%			**163**
ES	1%	0%			0%	29%	0%			0%	25%	18%	0%	0%	1%	22%						0%	0%	0%	2%			**421**
FI	2%	2%			2%	8%	2%	4%	2%		25%	44%			4%	2%									2%			**48**
FR	2%	4%				22%	5%	1%	4%	2%		35%	0%		3%	18%						0%	0%	0%	3%	0%		**225**
GB	2%	5%			1%	10%	5%		11%		45%		1%	1%	7%	7%					1%	1%		1%	3%			**152**
HR	1%	1%	1%		1%	16%	1%		5%		20%	41%			2%	7%						1%			4%		1%	**167**
HU	1%	1%	0%		0%	11%	1%		3%	1%	35%	24%			1%	20%					1%	0%		0%	1%			**378**
IE						2%	8%		2%		11%	63%		2%		5%					2%	2%			5%		2%	**64**
IT	0%	2%			0%	8%	2%		5%	0%	45%	32%	0%	1%	0%				0%		1%	0%	0%		1%	0%		**460**
NL	0%	8%			0%	19%	6%		2%	2%	23%	28%	0%	1%	2%	1%									6%			**206**
PL	1%	2%		0%	1%	14%	2%		4%	1%	34%	31%		1%	1%	4%	0%	0%		0%	0%		0%	1%	2%		0%	**663**
RO		0%				5%	1%		2%		41%	25%		0%	2%	22%					1%	0%	0%		1%			**251**
SI	2%	2%			2%	8%	2%		4%	2%	32%	27%	0%	0%	1%	6%			0%		3%	5%		0%	3%		0%	**236**
SE		1%				8%	7%		1%	3%	32%	40%			1%	6%					1%	1%						**104**

Source: OBS on EurodataTV

3.2.3. EU non-national film imports on TVOD

Insights :

On TVOD, as capacities are unlimited and the datasets include several major pan-European TVOD services, but also smaller national ones, major differences in EU film imports can be seen.

The average for the import of EU non-national films on TVOD in October 2016 was 1 300 films (see Figure 53).

Austria was the country where the most EU non-national films were available, with 3 360 films, closely followed by Belgium, with 3 228 films. Ireland, Sweden, Luxembourg, Denmark and Finland were also among the biggest importers.

Among EU-5 countries, only the United Kingdom had fewer films than the rest of the EU on average, with 1 158 EU non-national films available on British TVOD services.

On the other hand, Portugal, the Czech Republic, Estonia, Hungary, Lithuania, Latvia, Bulgaria and Croatia all had a number of EU non-national films below the EU average of 1 300 films.

Co-productions represented the larger part of EU non-national imports only in catalogues of Hungarian, Greek and Italian TVOD services. They ranged from 45% in Germany to 47% in the United Kingdom

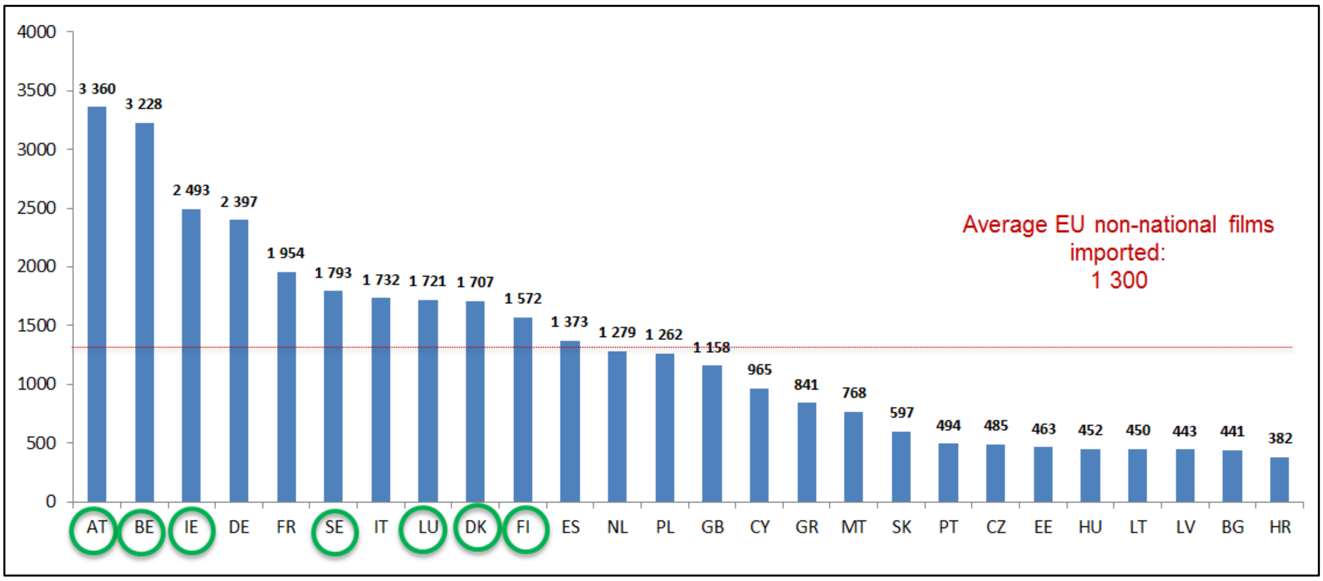
With the exception of Portugal, co-production represented at least 1/3 of EU non-national film imports.

Bigger film volume-producing countries were among the countries with the highest share of co-productions among their EU non-national film imports.

The import matrices Matrix 11 and Matrix 12 show again the dominance of British, French and German films on TVOD, the main sources for film for the majority of countries.

The impact of language and cultural proximity can also be seen in some exchanges, such as BE/NL, CZ/SK, AT/DE and for Swedish films in FI and DK.

Figure 54. TVOD – Total number of EU non-national films imported by country, in units



Source: OBS

Map 28 TVOD – Total number of EU non-national films imported by country, in units

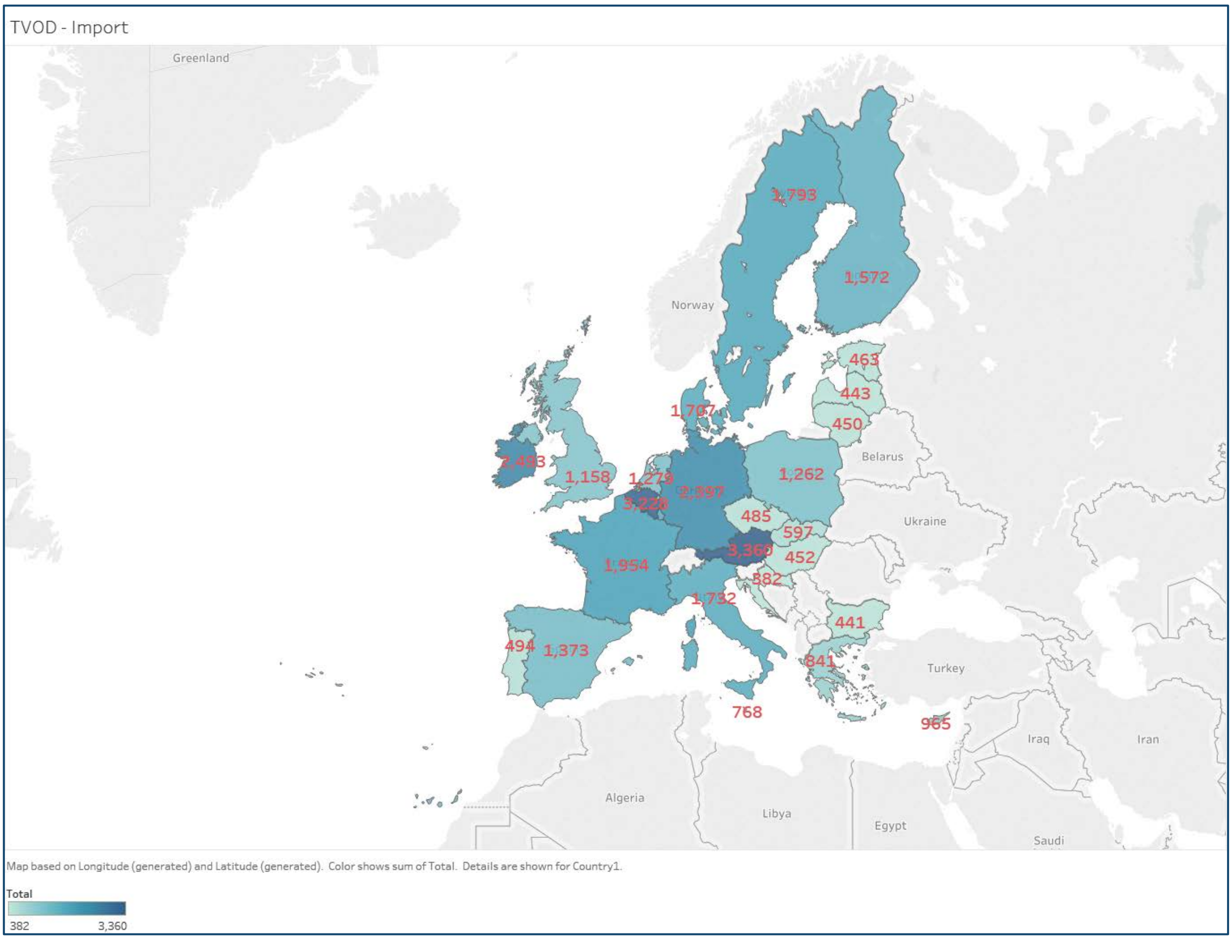
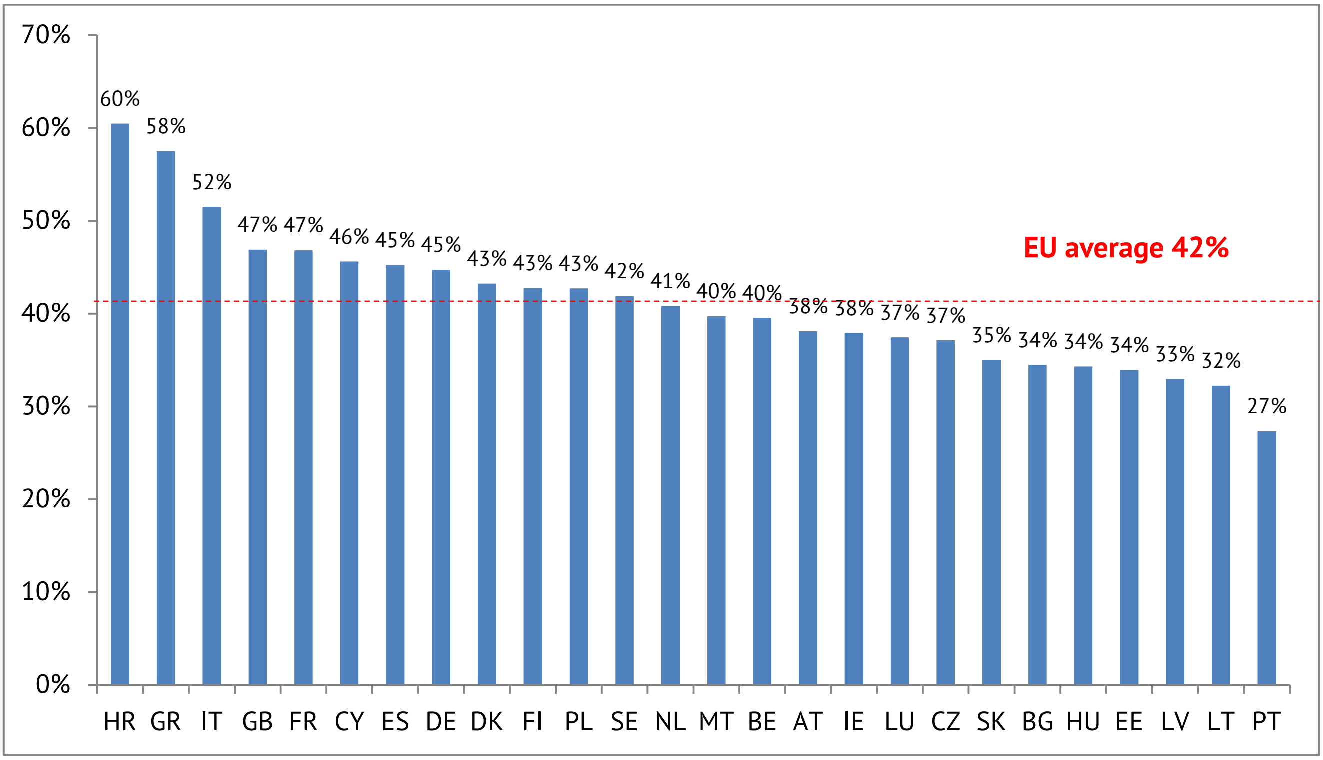
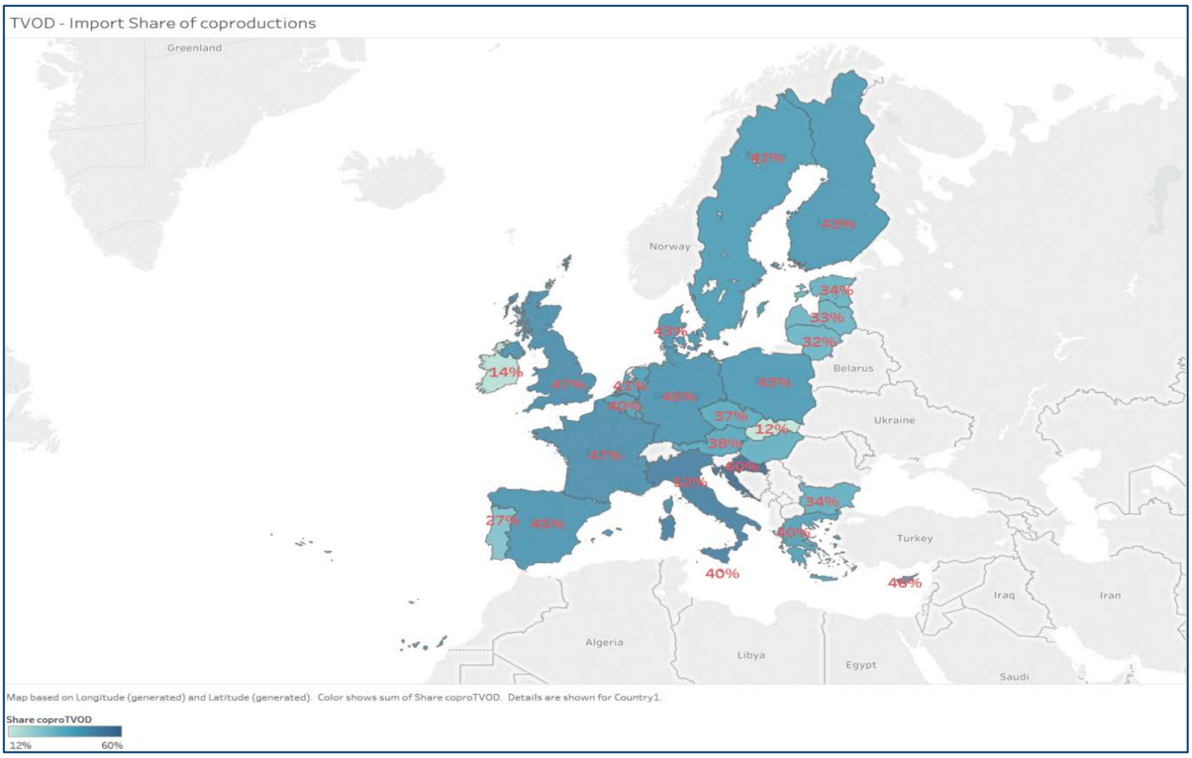


Figure 55. TVOD – Share of co-production out of EU non-national film imports, in % of total imports



Source: OBS

Map 29 TVOD – Share of co-production out of EU non-national film imports



Matrix 11 TVOD – Import Matrix October 2016, in units for imports per country and total imports

	COUNTRY OF EXPORT																												
COUNTRY OF IMPORT	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	Total import EU non-national films
AT		48	10	1	24	1044	68	8	139	28	641	891	3		11	46	214	3	8	2	1	65	19	1	5	76		4	**3360**
BE	35		13		15	183	59	3	130	15	1556	681	7		14	43	150	1	17	2		199	20	8	15	56	2	4	**3228**
BG	9	9		1	19	27	6	1	22	6	30	243	2		5	16	22		2	1		7	3		3	6		1	**441**
CY	13	13	2		17	71	16	2	43	12	98	521	3		6	37	49	2	3	1		28	4	1	5	17		1	**965**
CZ	11	10	3	1		35	7	1	24	7	47	264	2		5	17	22		2	1		7	4		3	7		5	**485**
DE	130	42	11	1	24		68	4	133	26	639	895	3		11	41	199	3	8	2	1	58	18	1	4	72		3	**2397**
DK	12	22	7	1	30	113		2	95	26	282	773	2		8	39	85	2	1	1		17	14	1	8	166			**1707**
EE	9	10	2	1	24	28	7		22	5	32	248	2		5	15	24		2	1		8	4		4	9		1	**463**
ES	7	22	6		8	129	34	3		13	283	672	4		6	28	90		1	1		21	9	2	2	31		1	**1373**
FI	10	20	6	1	29	103	52	3	81		238	731	2		6	35	73	1		1		15	10	2	6	145		2	**1572**
FR	42	101	14		22	214	58	5	184	26		832	10		24	43	191	2	11	1		39	30	24	21	56	3	1	**1954**
GB	38	33	7		32	152	62	4	101	15	372		6		11	89	100	2	10	2	2	34	14	8	14	47		3	**1158**
GR	13	13	3	2	26	70	14	3	46	8	116	414			7	25	44		2	1		13	5		5	9	1	1	**841**
HR	1	12	1		3	32	10		20	2	100	137	1		3	6	21		1		1	1	4	2	5	17	2		**382**
HU	10	11	2	1	22	29	7	1	24	5	35	238	2			16	22		2	1		8	5		4	6		1	**452**
IE	34	38	10	1	32	139	68	3	90	17	378	1423	10		10		101	2	9	2	2	38	16	6	15	47		2	**2493**
IT	15	38	12	1	8	142	34	1	128	13	474	716	7		10	35		2	2	1		24	8	2	7	51	1		**1732**
LT	9	10	1	1	22	25	7	1	22	5	31	245	2		5	14	22		2	1		8	4		4	8		1	**450**
LU	22	73	5		10	145	31	5	69	8	630	495	4		7	21	68	2		2		63	10	4	10	35	1	1	**1721**
LV	8	10	1	1	21	27	6	1	20	5	30	243	2		5	14	22		2			8	4		4	8		1	**443**
MT	11	12	4	1	21	47	9	1	38	8	68	451	2		5	17	36		3	1		12	3		4	13		1	**768**
NL	8	98	6	1	6	110	32	2	49	17	229	579	4		9	28	43		1	2			10	5	5	33	1	1	**1279**
PL	11	20	5	2	37	102	32	2	88	17	254	463	4		9	25	121	1	2	1		20		1	10	31		4	**1262**
PT	5	8	2	1	21	31	11	1	26	6	36	279	2		4	17	17			1		9	6		2	7	1	1	**494**
RO																													**n/a**
SE	12	27	9	1	32	132	67	1	93	50	316	854	4		9	42	92	2	1	1		23	17	1	5		1	1	**1793**
SI																													**n/a**
SK	12	11	2	1	66	47	11	1	30	9	46	275	1		6	19	25		2	1		11	6		4	11			**597**

Source: OBS

Matrix 12 TVOD – Import matrix October 2016, in % of total imports for each country and units for total imports

	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB	GR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	Total import EU non-national films
AT		1,4%	0,3%	0,0%	0,7%	31,1%	2,0%	0,2%	4,1%	0,8%	19,1%	26,5%	0,1%		0,3%	1,4%	6,4%	0,1%	0,2%	0,1%	0,0%	1,9%	0,6%	0,0%	0,1%	2,3%		0,1%	**3 360**
BE	1,1%		0,4%		0,5%	5,7%	1,8%	0,1%	4,0%	0,5%	48,2%	21,1%	0,2%		0,4%	1,3%	4,6%	0,0%	0,5%	0,1%		6,2%	0,6%	0,2%	0,5%	1,7%	0,1%	0,1%	**3 228**
BG	2,0%	2,0%		0,2%	4,3%	6,1%	1,4%	0,2%	5,0%	1,4%	6,8%	55,1%	0,5%		1,1%	3,6%	5,0%		0,5%	0,2%		1,6%	0,7%		0,7%	1,4%		0,2%	**441**
CY	1,3%	1,3%	0,2%		1,8%	7,4%	1,7%	0,2%	4,5%	1,2%	10,2%	54,0%	0,3%		0,6%	3,8%	5,1%	0,2%	0,3%	0,1%		2,9%	0,4%	0,1%	0,5%	1,8%		0,1%	**965**
CZ	2,3%	2,1%	0,6%	0,2%		7,2%	1,4%	0,2%	4,9%	1,4%	9,7%	54,4%	0,4%		1,0%	3,5%	4,5%		0,4%	0,2%		1,4%	0,8%		0,6%	1,4%		1,0%	**485**
DE	5,4%	1,8%	0,5%	0,0%	1,0%		2,8%	0,2%	5,5%	1,1%	26,7%	37,3%	0,1%		0,5%	1,7%	8,3%	0,1%	0,3%	0,1%	0,0%	2,4%	0,8%	0,0%	0,2%	3,0%		0,1%	**2 397**
DK	0,7%	1,3%	0,4%	0,1%	1,8%	6,6%		0,1%	5,6%	1,5%	16,5%	45,3%	0,1%		0,5%	2,3%	5,0%	0,1%	0,1%	0,1%		1,0%	0,8%	0,1%	0,5%	9,7%			**1 707**
EE	1,9%	2,2%	0,4%	0,2%	5,2%	6,0%	1,5%		4,8%	1,1%	6,9%	53,6%	0,4%		1,1%	3,2%	5,2%		0,4%	0,2%		1,7%	0,9%		0,9%	1,9%		0,2%	**463**
ES	0,5%	1,6%	0,4%		0,6%	9,4%	2,5%	0,2%		0,9%	20,6%	48,9%	0,3%		0,4%	2,0%	6,6%		0,1%	0,1%		1,5%	0,7%	0,1%	0,1%	2,3%		0,1%	**1 373**
FI	0,6%	1,3%	0,4%	0,1%	1,8%	6,6%	3,3%	0,2%	5,2%		15,1%	46,5%	0,1%		0,4%	2,2%	4,6%	0,1%		0,1%		1,0%	0,6%	0,1%	0,4%	9,2%		0,1%	**1 572**
FR	2,1%	5,2%	0,7%		1,1%	11,0%	3,0%	0,3%	9,4%	1,3%		42,6%	0,5%		1,2%	2,2%	9,8%	0,1%	0,6%	0,1%		2,0%	1,5%	1,2%	1,1%	2,9%	0,2%	0,1%	**1 954**
GB	3,3%	2,8%	0,6%		2,8%	13,1%	5,4%	0,3%	8,7%	1,3%	32,1%		0,5%		0,9%	7,7%	8,6%	0,2%	0,9%	0,2%	0,2%	2,9%	1,2%	0,7%	1,2%	4,1%		0,3%	**1 158**
GR	1,5%	1,5%	0,4%	0,2%	3,1%	8,3%	1,7%	0,4%	5,5%	1,0%	13,8%	49,2%			0,8%	3,0%	5,2%		0,2%	0,1%		1,5%	0,6%		0,6%	1,1%	0,1%	0,1%	**841**
HR	0,3%	3,1%	0,3%		0,8%	8,4%	2,6%		5,2%	0,5%	26,2%	35,9%	0,3%		0,8%	1,6%	5,5%		0,3%		0,3%	0,3%	1,0%	0,5%	1,3%	4,5%	0,5%		**382**
HU	2,2%	2,4%	0,4%	0,2%	4,9%	6,4%	1,5%	0,2%	5,3%	1,1%	7,7%	52,7%	0,4%			3,5%	4,9%		0,4%	0,2%		1,8%	1,1%		0,9%	1,3%		0,2%	**452**
IE	1,4%	1,5%	0,4%	0,0%	1,3%	5,6%	2,7%	0,1%	3,6%	0,7%	15,2%	57,1%	0,4%		0,4%		4,1%	0,1%	0,4%	0,1%	0,1%	1,5%	0,6%	0,2%	0,6%	1,9%		0,1%	**2 493**
IT	0,9%	2,2%	0,7%	0,1%	0,5%	8,2%	2,0%	0,1%	7,4%	0,8%	27,4%	41,3%	0,4%		0,6%	2,0%		0,1%	0,1%	0,1%		1,4%	0,5%	0,1%	0,4%	2,9%	0,1%		**1 732**
LT	2,0%	2,2%	0,2%	0,2%	4,9%	5,6%	1,6%	0,2%	4,9%	1,1%	6,9%	54,4%	0,4%		1,1%	3,1%	4,9%		0,4%	0,2%		1,8%	0,9%		0,9%	1,8%		0,2%	**450**
LU	1,3%	4,2%	0,3%		0,6%	8,4%	1,8%	0,3%	4,0%	0,5%	36,6%	28,8%	0,2%		0,4%	1,2%	4,0%	0,1%		0,1%		3,7%	0,6%	0,2%	0,6%	2,0%	0,1%	0,1%	**1 721**
LV	1,8%	2,3%	0,2%	0,2%	4,7%	6,1%	1,4%	0,2%	4,5%	1,1%	6,8%	54,9%	0,5%		1,1%	3,2%	5,0%		0,5%			1,8%	0,9%		0,9%	1,8%		0,2%	**443**
MT	1,4%	1,6%	0,5%	0,1%	2,7%	6,1%	1,2%	0,1%	4,9%	1,0%	8,9%	58,7%	0,3%		0,7%	2,2%	4,7%		0,4%	0,1%		1,6%	0,4%		0,5%	1,7%		0,1%	**768**
NL	0,6%	7,7%	0,5%	0,1%	0,5%	8,6%	2,5%	0,2%	3,8%	1,3%	17,9%	45,3%	0,3%		0,7%	2,2%	3,4%		0,1%	0,2%			0,8%	0,4%	0,4%	2,6%	0,1%	0,1%	**1 279**
PL	0,9%	1,6%	0,4%	0,2%	2,9%	8,1%	2,5%	0,2%	7,0%	1,3%	20,1%	36,7%	0,3%		0,7%	2,0%	9,6%	0,1%	0,2%	0,1%		1,6%		0,1%	0,8%	2,5%		0,3%	**1 262**
PT	1,0%	1,6%	0,4%	0,2%	4,3%	6,3%	2,2%	0,2%	5,3%	1,2%	7,3%	56,5%	0,4%		0,8%	3,4%	3,4%			0,2%		1,8%	1,2%		0,4%	1,4%	0,2%	0,2%	**494**
RO																													**n/a**
SE	0,7%	1,5%	0,5%	0,1%	1,8%	7,4%	3,7%	0,1%	5,2%	2,8%	17,6%	47,6%	0,2%		0,5%	2,3%	5,1%	0,1%	0,1%	0,1%		1,3%	0,9%	0,1%	0,3%		0,1%	0,1%	**1 793**
SI																													**n/a**
SK	2,0%	1,8%	0,3%	0,2%	11,1%	7,9%	1,8%	0,2%	5,0%	1,5%	7,7%	46,1%	0,2%		1,0%	3,2%	4,2%		0,3%	0,2%		1,8%	1,0%		0,7%	1,8%			**597**

Source: OBS

3.3. National films played a role in EU non-national film imports – The share of national films among EU film offerings

Another way to examine the import of EU non-national films and their weight in the audiovisual film diet of EU countries, is to look at the share of EU non-national films among total EU films, meaning national and EU non-national films.

As the figures on the region of origin of films in the EU show (see Figure 11, Figure 17 and Figure 23), for all distribution platforms, international films on the whole dominated the film diet of all EU countries.

Therefore, it can be taken as a ‘constant’ that throughout the EU, international films made up above 50% of films on offer (and even around 70% for films on TV and on TVOD).

The following questions on the circulation of EU non-national films arise: Which countries relied more on their national production for their EU film consumption; Which countries depended more on the import of EU films for EU film consumption?

Higher volume-producing countries as well as several smaller volume-producing countries relied more on their national film production than on imports for EU films.

The ratio “Share of national films” (see Schema 2), shows this importance of national films, or of EU non-national films, for EU film consumption.

- If the ratio is above 50%, the country relied more on national films than on EU imports for EU film consumption.
- If the ratio is below 50%, the country relied more on EU non-national films.

Schema 2 Share of national films ratio

$$\frac{\text{NATIONAL FILMS}^{*} \text{ (in cinemas, on TV or TVOD)}}{\text{TOTAL EU FILM OFFERING (in cinemas, on TV or TVOD)}}$$

Source: OBS

- National film share in cinemas

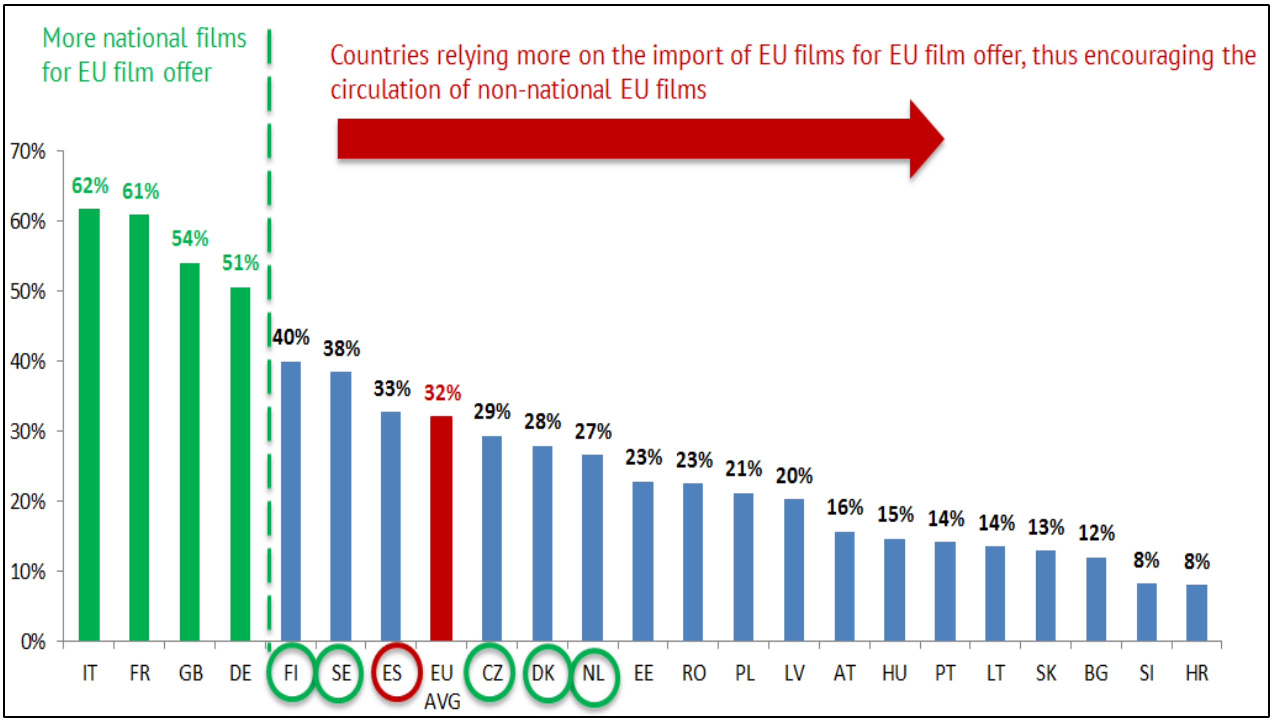
In cinemas, Italy, France, the United Kingdom and Germany relied more on national films than on EU non-national films.

Finland, Sweden and Spain also released more national films than the EU average; the largest share of their EU film offering was however EU non-national films.

Austria, Hungary, Portugal, Lithuania, the Slovak Republic, Bulgaria, Slovenia and Croatia all had a share of national films below 20% in their EU film offering, thus depending for more than 4/5 of their EU film consumption on imports.

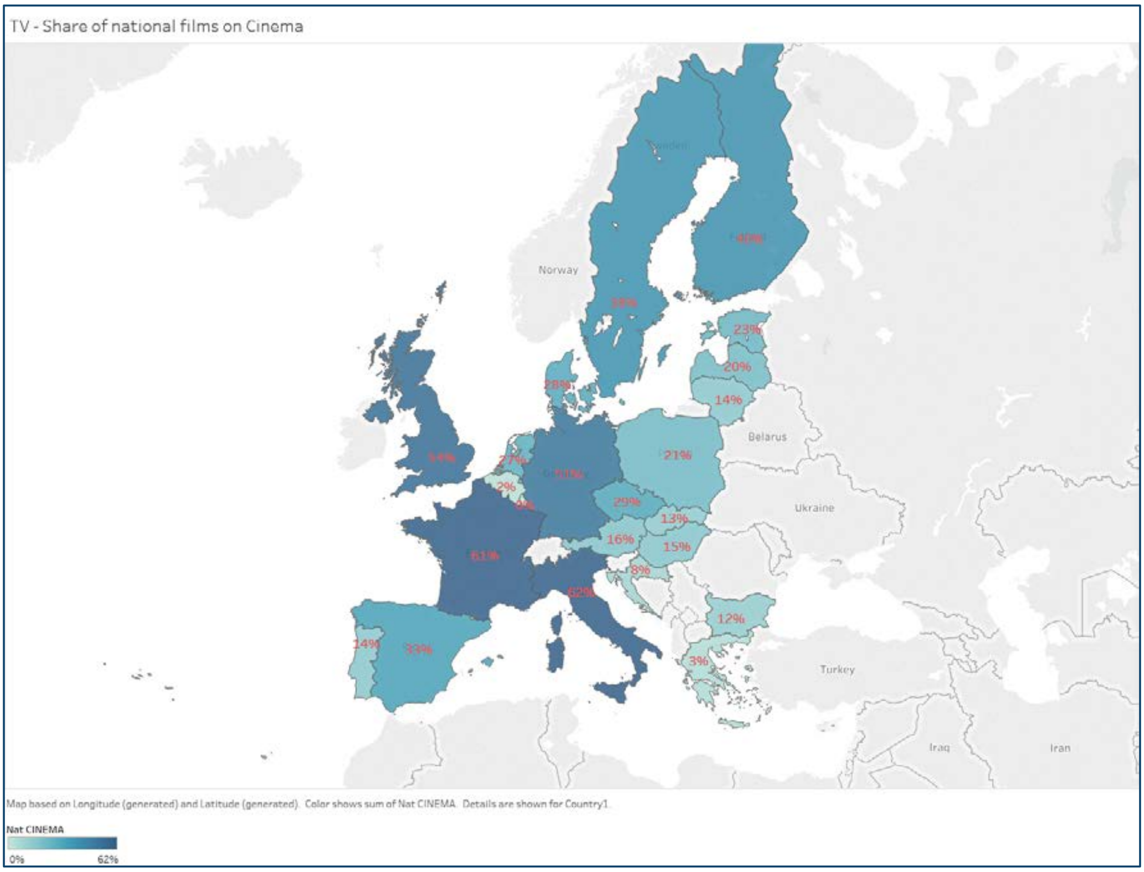
The remainingcountries counted on average on EU non-national films to the tune of 2/3, for their EU film consumption.

Figure 56. Cinema – Share of national films in EU film offering, in % of total EU film offerings



Source: OBS on LUMIERE

Map 30 Cinema – Share of national films in EU film offering, in % of total EU film offerings



Map based on Longitude (generated) and Latitude (generated). Color shows sum of Nat CINEMA. Details are shown for Country1.

- National film share on TV

For films on TV, countries generally relied more on their national production, as the EU average of 48% shows.

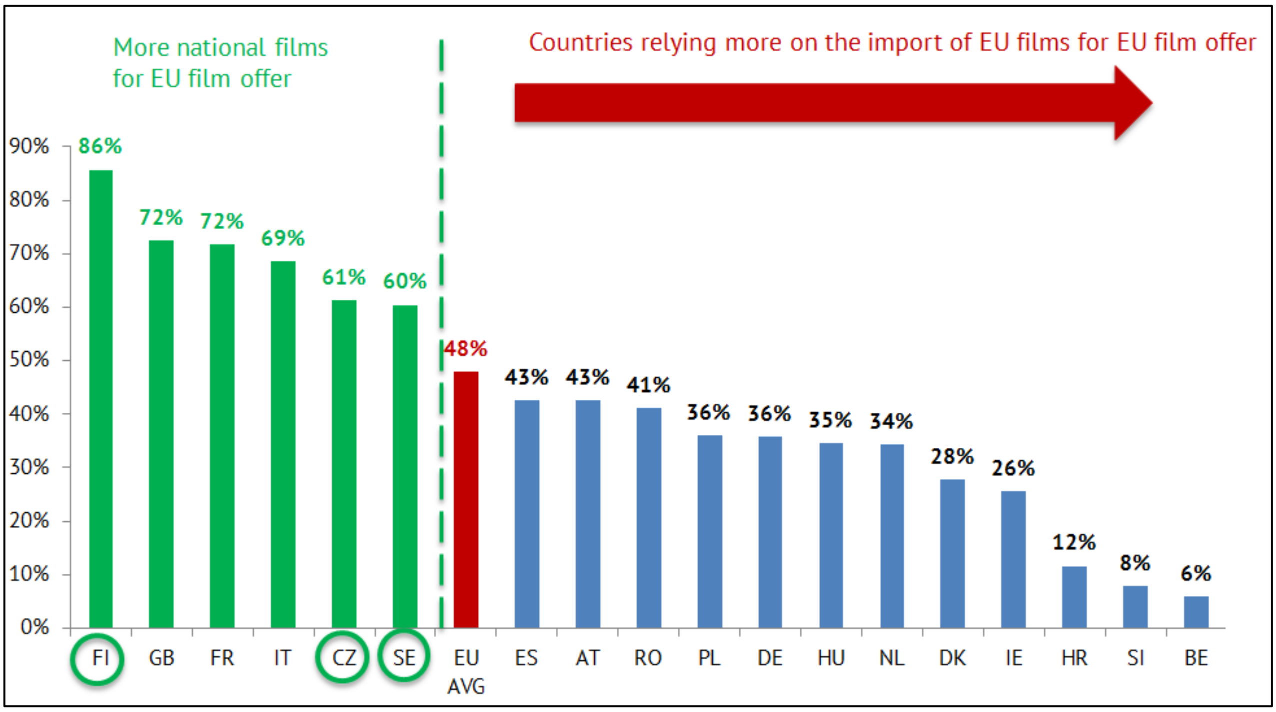
In Finland, the United Kingdom, France, Italy, the Czech Republic and Sweden more national productions were broadcasted on TV channels, showing their audiences' preferences for national productions.

On the other hand, in Denmark, Ireland, Hungary, Slovenia and Belgium, more than 2/3 of their EU offering was made up of EU non-national films.

TV was for bigger and even smaller film-production countries a medium on which national productions appeared to be generally preferred by audiences, as opposed toEU non-national productions.

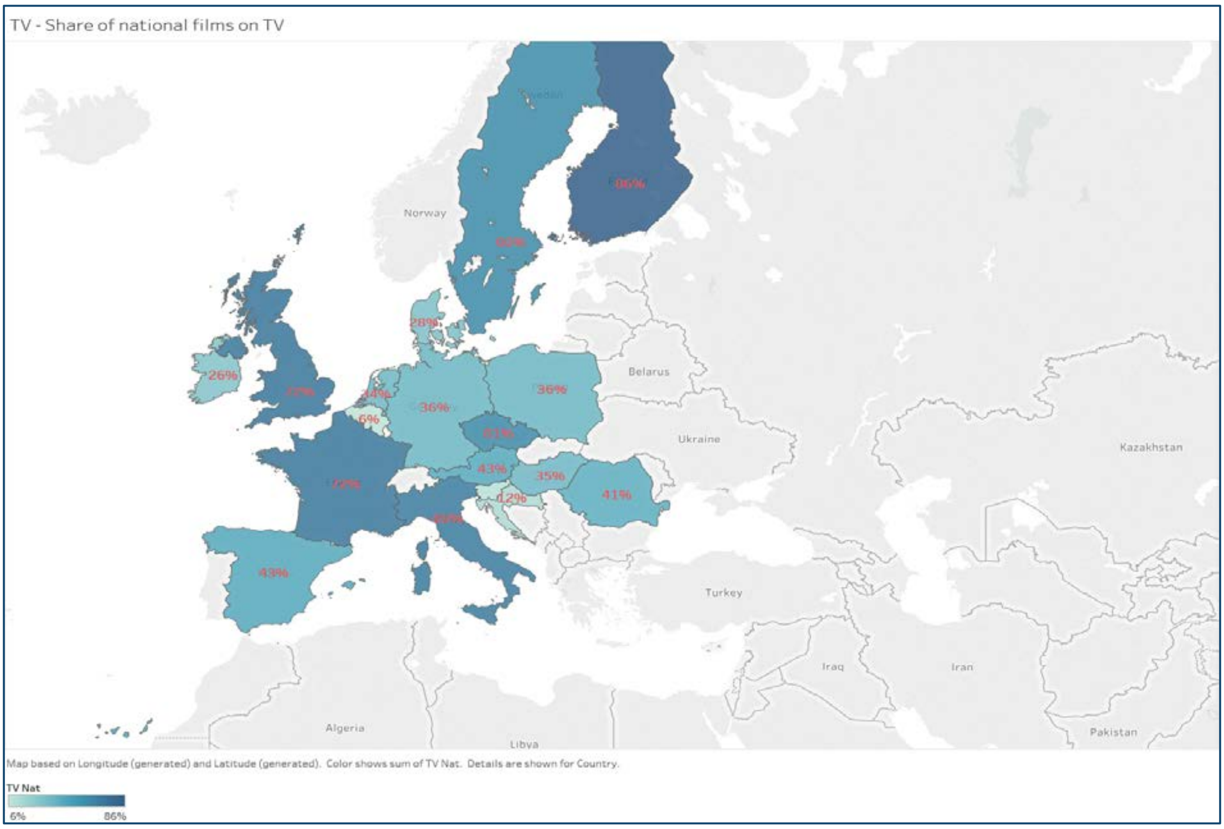
As was seen in the export section for TV, EU non-national films were produced mainly in the EU-5, almost nine out of 10 films. This appears to indicate a general preference on TV for films that had some commercial success upon their theatrical release.

Figure 57. TV - Share of national films in EU film offering, in % of total EU film offerings



Source: OBS on EurodataTV

Map 31 TV - Share of national films in EU film offering, in % of total EU film offerings



- National film share on TVOD

On TVOD, considering the number of films available, only in French and British catalogues did national films prevail over EU non-national films.

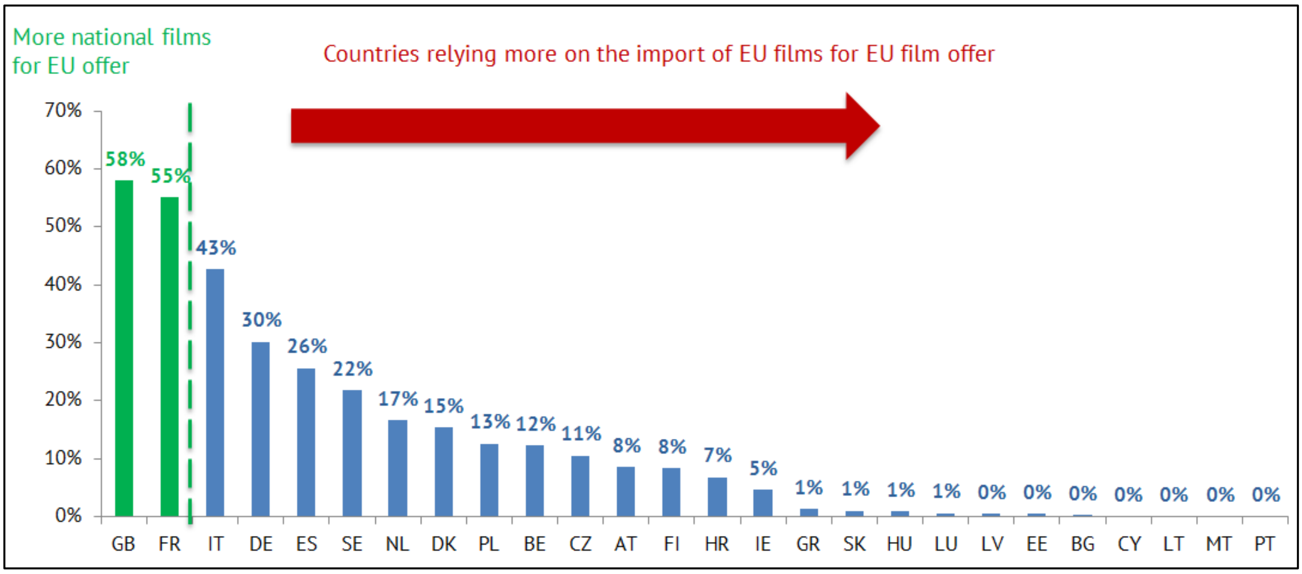
Only high-volume-producing countries had a national film share above 25%.

A total of 15 countries had a share of national films below 10%.

TVOD was the distribution platform on which EU non-national films accounted for the lion's share of EU film offerings through the EU, except for France and the United Kingdom.

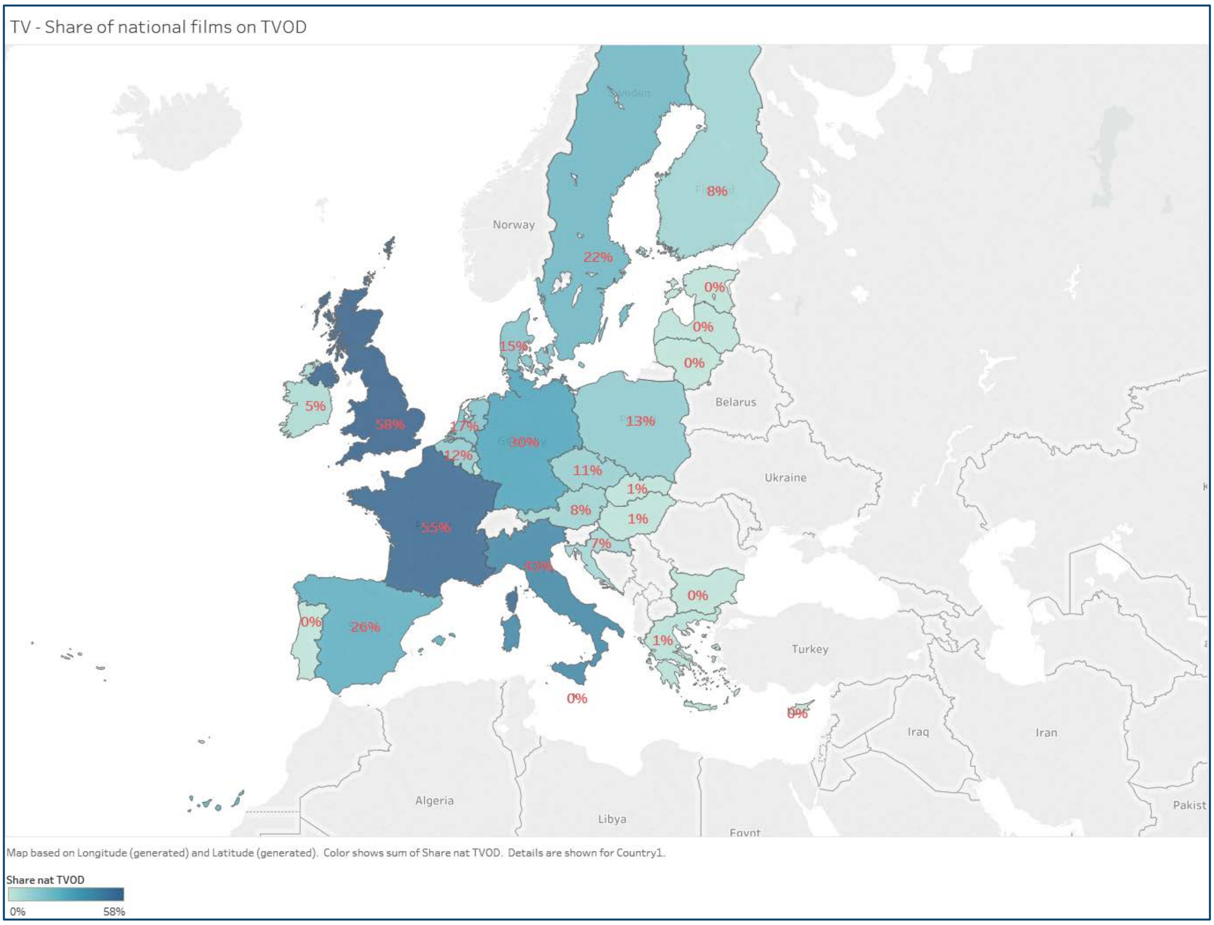
These findings must be noted in the context of the high number of films available on TVOD services.

Figure 58. TVOD - Share of national films out of EU film offering, in % of total EU film offerings



Source: OBS

Map 32 TVOD - Share of national films out of EU film offering, in % of total EU film offerings



TV - Share of national films on TVOD

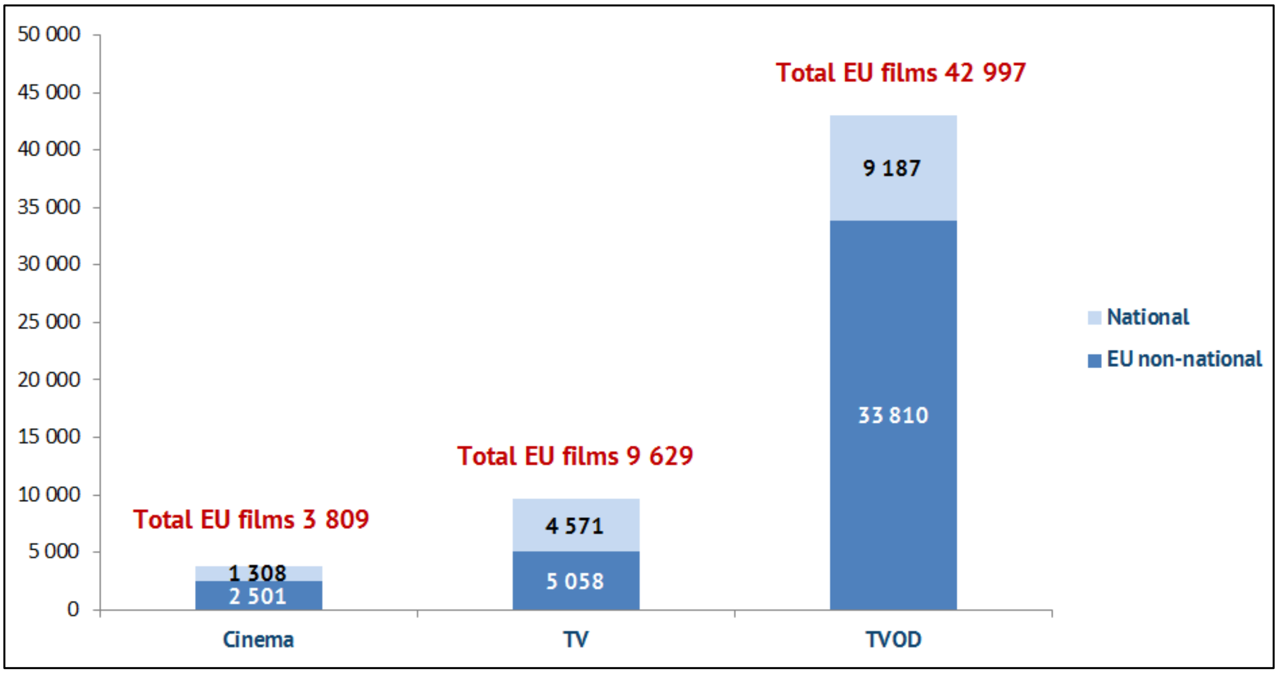
Map based on Longitude (generated) and Latitude (generated). Color shows sum of Share nat TVOD. Details are shown for Country1.

3.3.1. Summary of the repartition of EU non-national and national films in cinemas, on TV and TVOD

Insights:

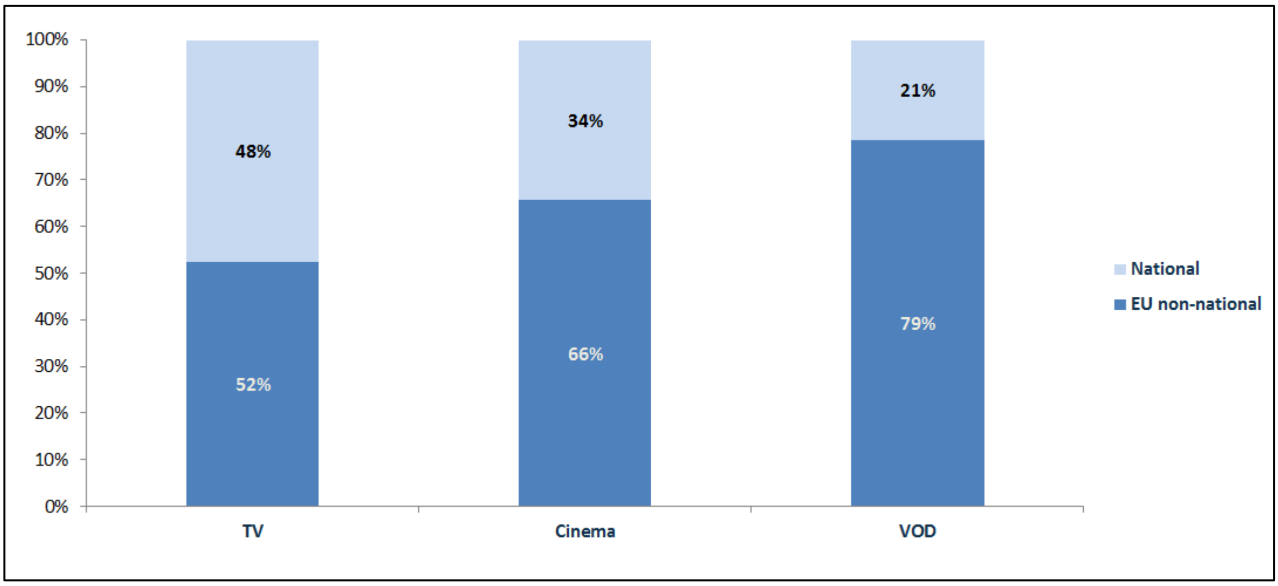
- The highest share of EU non-national films out of total EU film offerings was found on TVOD services, with EU non-national films representing 79% of all EU films available on the 68 TVOD catalogues examined.
- The second highest share of EU non-national films was found in cinemas, with 66% of all EU films on first release in 2015 EU non-national/EU film imports.
- Finally, as seen earlier, TV was the distribution platform where EU non-national films and national films were almost equally broadcasted on a pan-European level.
- These figures show that EU non-national films made up the highest share of EU films available on all three distribution platforms, meaning that EU non-national films did circulate and were the second-highest category of films released, broadcasted and available, behind international films, on a pan-European level.

Figure 59. Summary of the repartition of EU films – EU non-national films and national films for cinema, TV and TVOD, in units



Source: LUMIERE, OBS on EurodataTV, OBS

Figure 60. Summary of the repartition of EU films – EU non-national films and national films for cinema, TV and TVOD, in %



Source: LUMIERE, OBS on EurodataTV, OBS

3.4. Matrix - Cluster analysis of EU non-national and national film offerings

Cinema (see Schema 4):

- Bulgaria, Croatia, Hungary, Lithuania, Latvia, Slovenia and the Slovak Republic are the countries in which the general EU film offering was relatively low compared to the rest of the EU Member States.
- Countries which had more EU films on offer than international films were Austria, Belgium, Greece, Luxembourg, Portugal, the Czech Republic, Poland, Germany, France and Italy.
- The United Kingdom was the only country with more national films than EU non-national films in the general EU film offering, but at the same time a country that relied less on EU films for its film offering - international films made up the lion’s share of films on first release in British cinemas.

TV (see Schema 5):

- On TV, almost all countries, except the Czech Republic, Finland, France and Italy relied more on international films, with such films making up at least 60% of all films broadcasted.
- Only the Czech Republic, Finland, France and Italy had a larger share of national films than EU non-national films, and at the same time a share of total EU films broadcasted above 40% of total films.

- The United Kingdom and Sweden were the only countries with a higher share of national films than EU films, but at the same time a low share of total EU films broadcasted, compared to international films, with EU films representing less than 20% of all films broadcasted.
- Denmark, Croatia, Ireland and Slovenia had a total broadcast share of total EU films below 20%, and EU non-national films represented the main share of their EU films broadcasted.

TVOD (see Schema 6):

- The sole countries with a share of total EU films above the proposed quota of 30% were Austria, Belgium, Hungary, Germany, Italy and France, with France, as previously noted, the only country with a share of national productions relative to EU total film offerings above 50%.
- The United Kingdom once again had a high share of national films among EU film offerings and a low total share of EU films relative to all films available.
- Germany, Italy, Spain and Sweden were, together with France and the United Kingdom, the only countries with a share of national productions relative to total EU film offerings above 20%.
- Bulgaria, Cyprus, the Czech Republic, Denmark, Estonia, Finland, Greece, Hungary, Ireland, Lithuania, Luxembourg, Latvia, Malta, the Netherlands, Poland, Portugual and the Slovak Republic had a low share of EU films available compared to all films available on the examined TVOD services, as well as a low share of national productions among total EU film offerings.
- In these countries, international films and EU non-national films made up the main offer of films available.

EU countries can be categorised into clusters depending on the national films share of total EU films and the EU films share of all films on offer (see Schema 3).

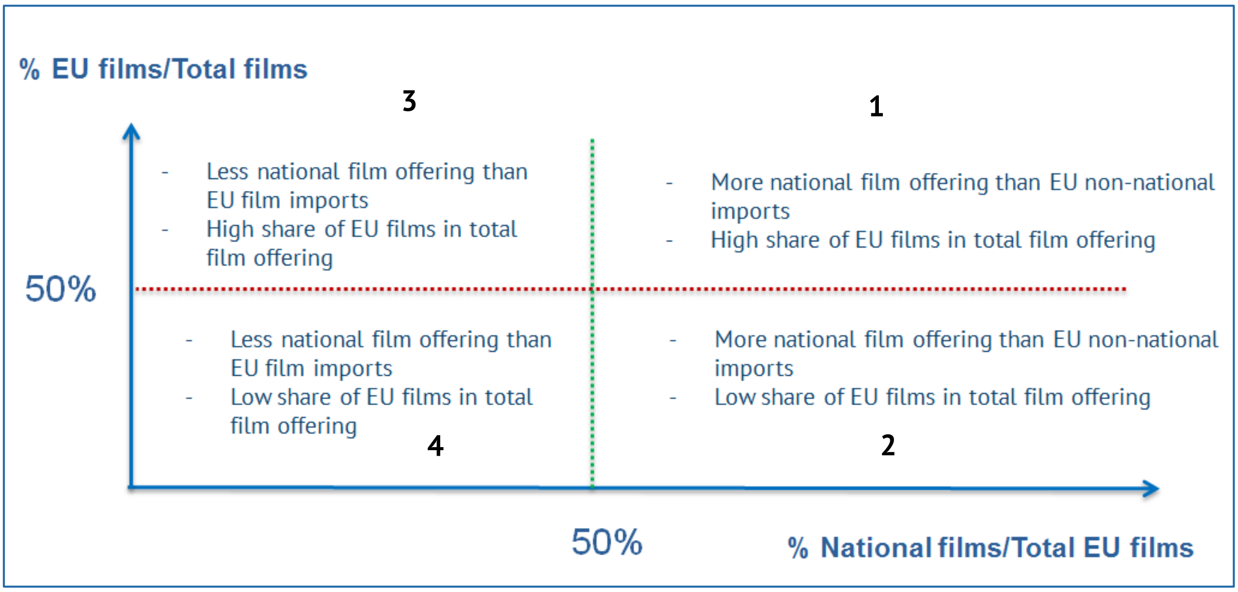
This cluster shows mainly four broad categories of national markets relative to EU films on offer:

1. Countries that relied more on their national production for EU film offerings and at the same time had a high share of EU films compared to total film offerings.
2. Countries that relied more on their national production for EU film offerings and at the same time had a comparatively low share of EU films compared to their total film offerings.
3. Countries that relied more on EU non-national films for their EU film offerings, and at the same time had a high share of EU films compared to their total film offerings.
4. Countries that relied more on EU non-national films, and at the same time had a low share of EU films compared to their total film offerings.

Countries in the quadrant number 4 and to a lesser extent number 2 are the countries where EU non-national film imports could most likely be improved. In fact, these are countries where EU films had a lower share than international films, and with the exception of the United Kingdom (and Sweden for TV), countries in which national films also accounted for a relatively low share compared to total EU film offerings.

Countries in quadrant 1 are countries for which the EU film offering mainly comprised national films but for which EU films already represented a relatively 'high share' compared to total film offerings.

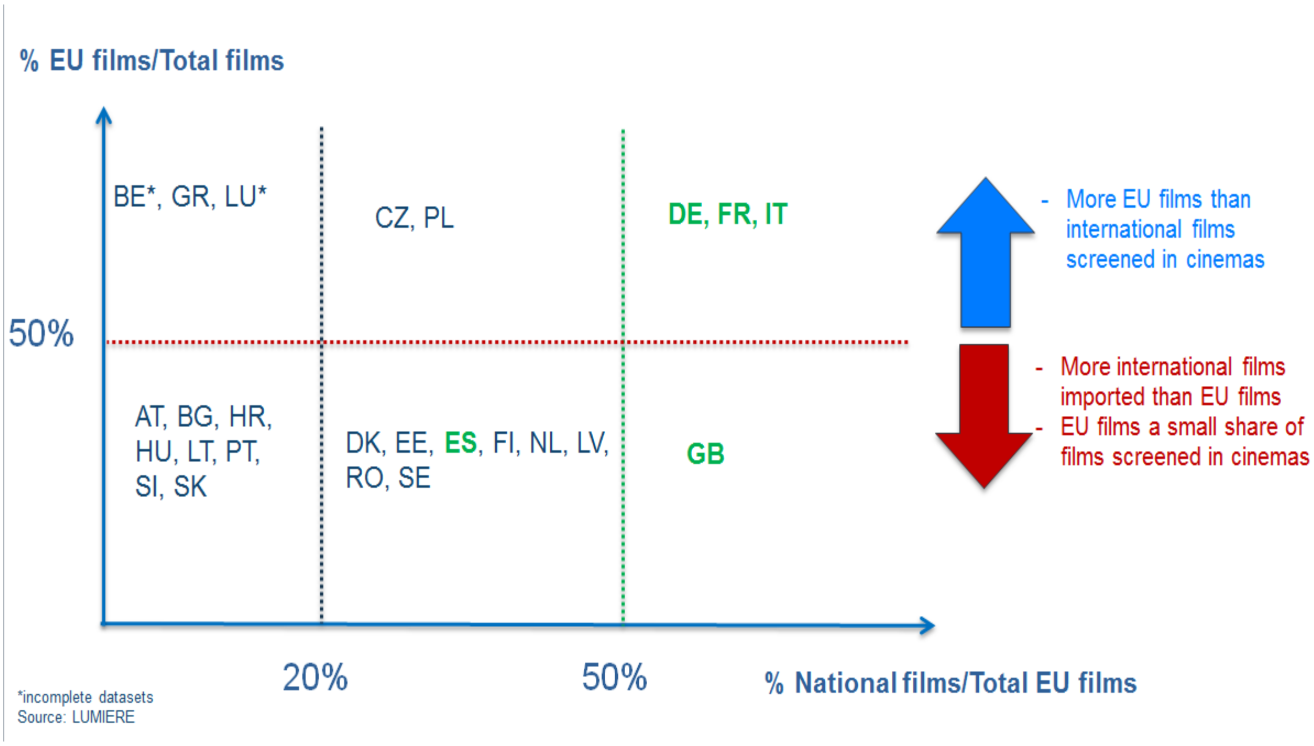
Schema 3 Cluster analysis of EU national markets and EU film offerings



Source: OBS

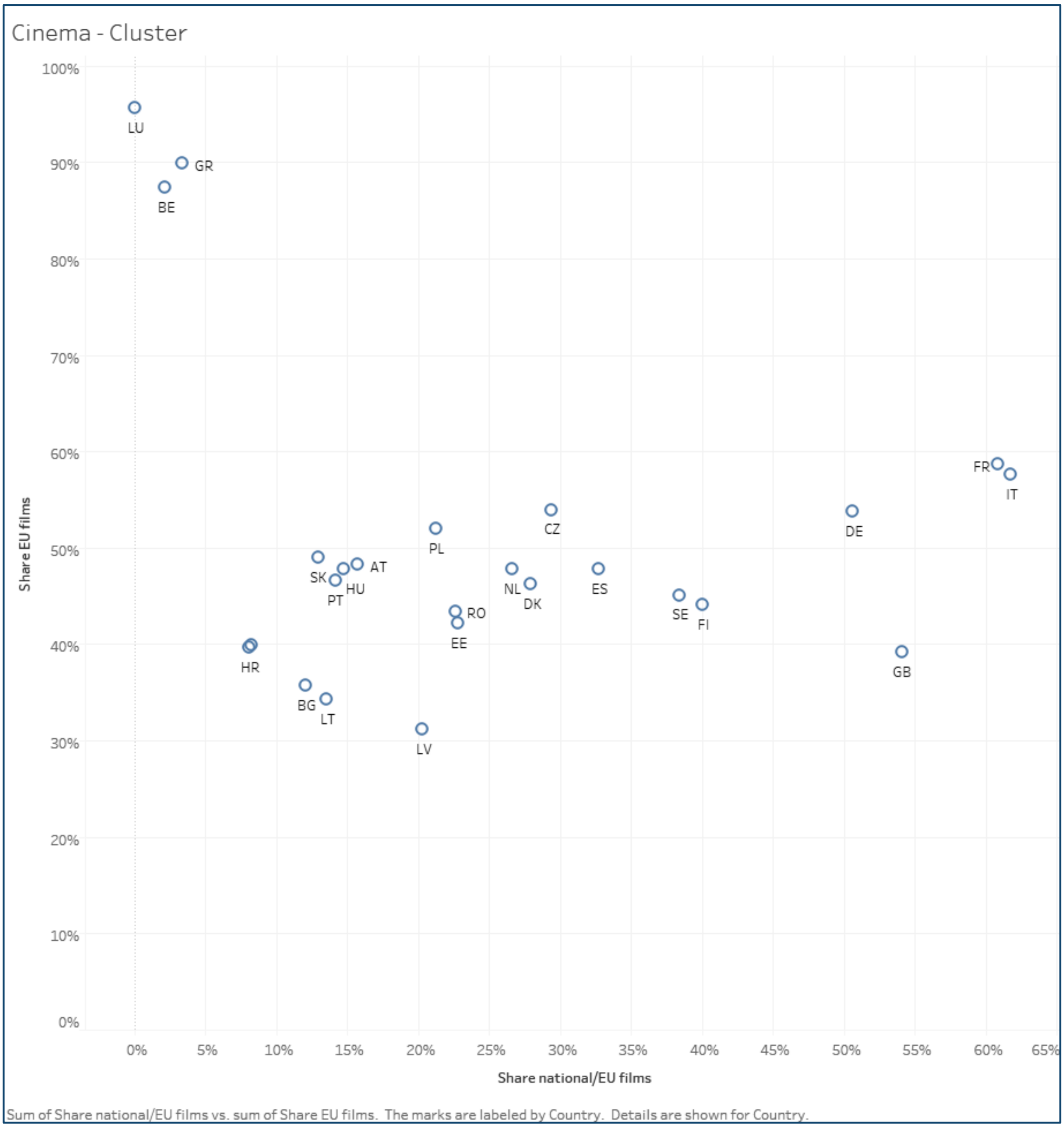
- Cluster matrix of film imports in cinemas

Schema 4 Cinema - Cluster analysis of EU national markets and EU film offerings



Source OBS on LUMIERE data, Data not complete for LU, GR, BE

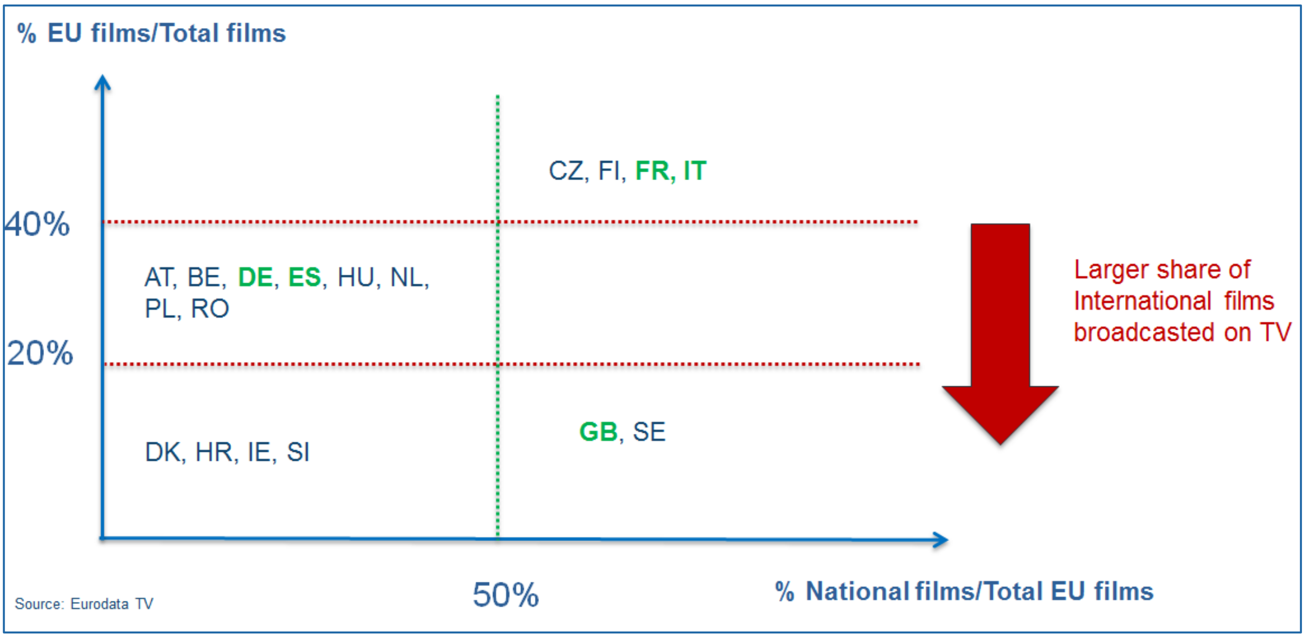
Cluster analysis 1 Cinema



Source: OBS on LUMIERE data, Data not complete for LU, GR, BE

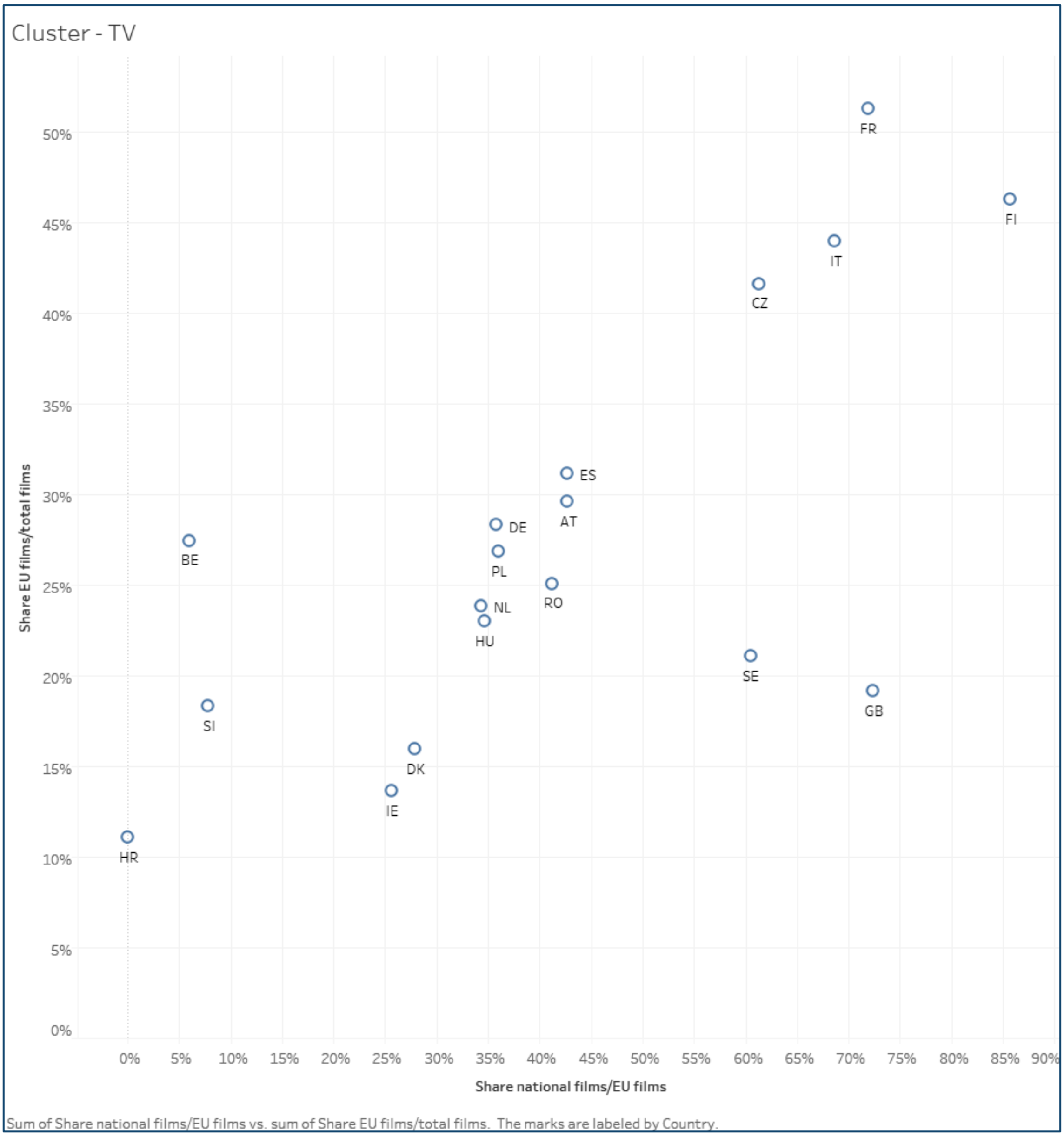
- Cluster matrix of film imports on TV

Schema 5 TV - Cluster analysis of EU national markets and EU film offerings



Source: OBS on EurodataTV

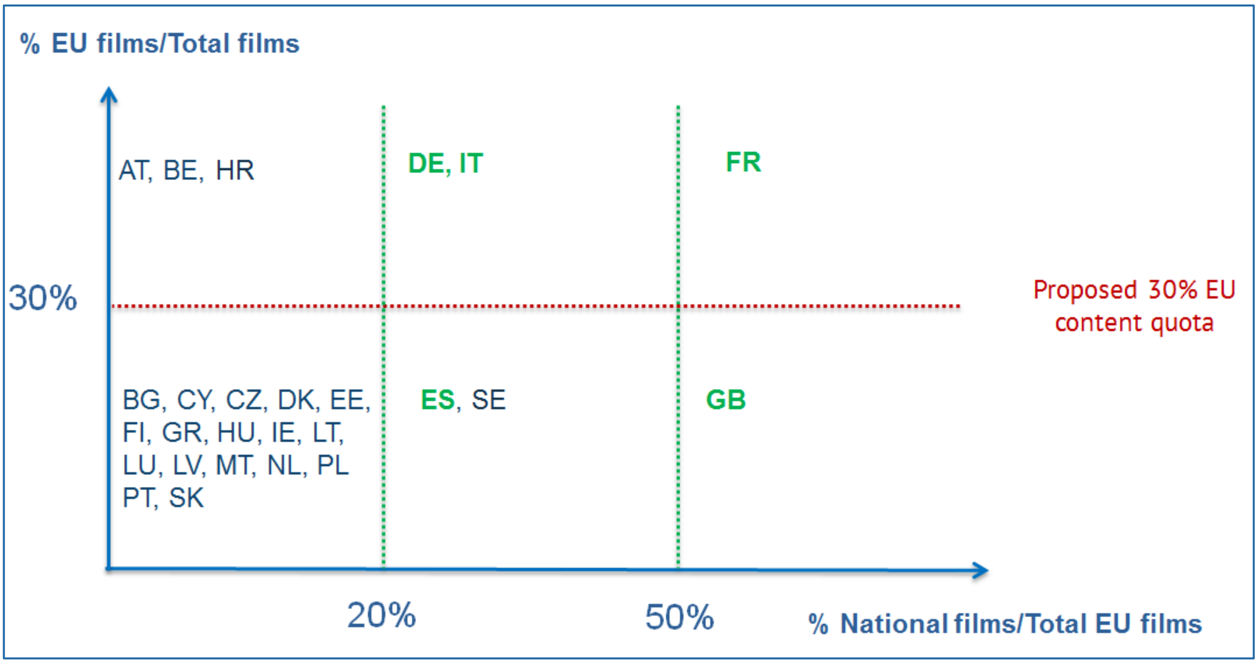
Cluster analysis 2 TV



Sum of Share national films/EU films vs. sum of Share EU films/total films. The marks are labeled by Country.

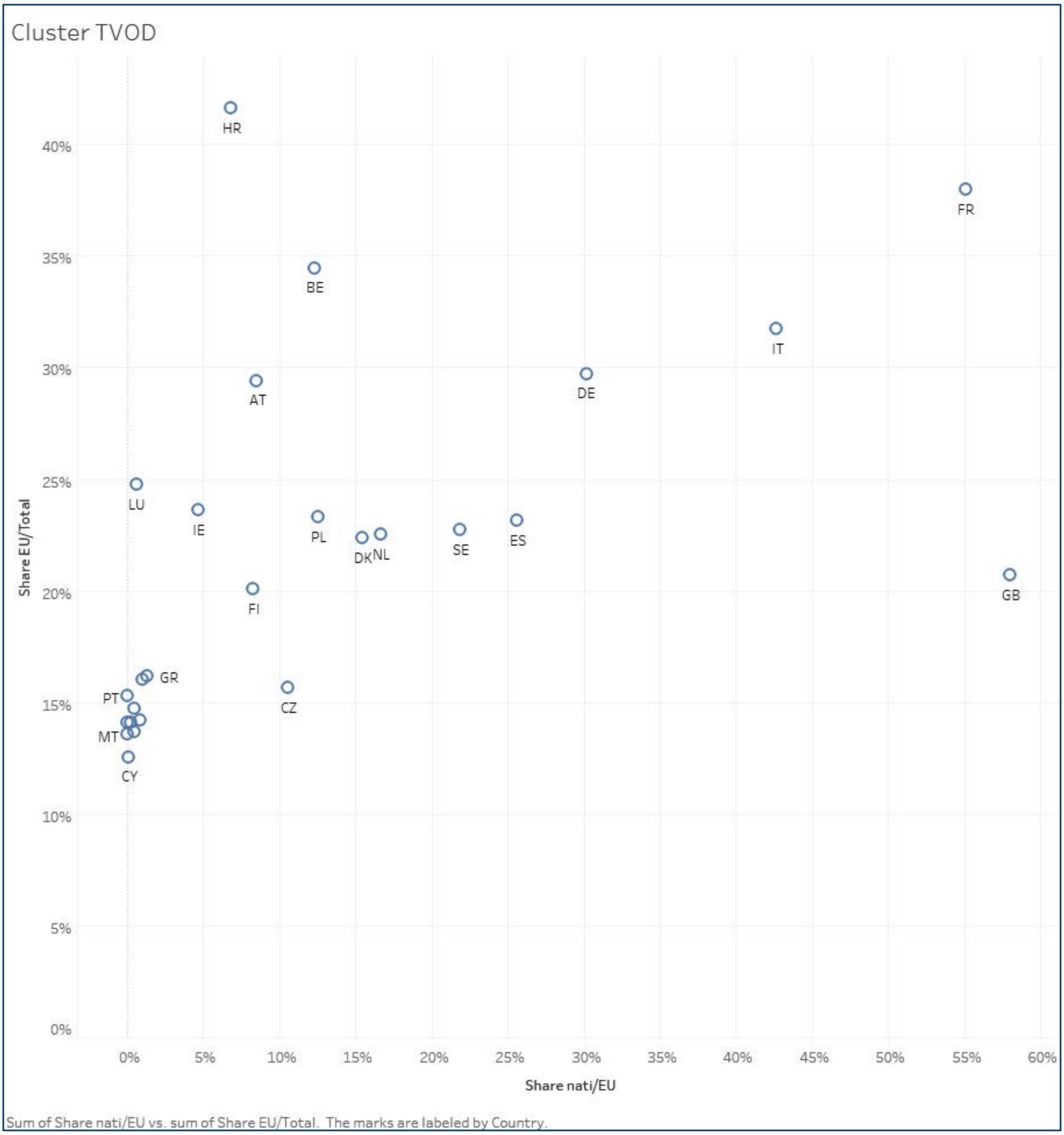
- Cluster matrix of film imports on TVOD

Schema 6 TVOD - Cluster analysis of EU national markets and EU film offering



Source: OBS

Cluster analysis 3 TVOD



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