



Film production in Europe

Production volume, co-production
and worldwide circulation

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Julio Talavera Milla



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1. Executive summary

Film production boomed in Europe by 47% over the past 10 years

More than 18 000 films were produced in Europe between 2007 and 2016, with overall production in Europe growing by 47%, from 1 444 feature films in 2007 to 2 124 in 2016. An upward trend for most of the period was recorded for both purely national productions and co-productions. Majority co-productions accounted for 20.4% of the overall production volume in Europe over the said period. The volume of documentaries boomed, almost doubling, to 698 films in 2016, while production of feature fiction also rose significantly, by 33%.

Top 10 production countries accounted for 73% of total volume

The top five producing European countries – the UK, France, Germany, Spain and Italy – accounted for 53.6% of overall production in the 36 countries covered in the analysis and the top 10 producing countries accounted for 73% of the films shot between 2007 and 2016. A total of 18 countries produced fewer than the average 25 films a year during that period. Only five of the 36 countries covered showed a decline in production between 2007-2008 and 2015-2016 (the UK, Belgium, Norway, Estonia and Hungary). Moreover, 10 countries more than doubled their production volume, with most of the producing countries registering the fastest growth located in Eastern Europe.

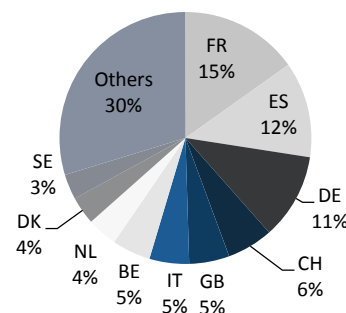
Majority co-production in Europe

Only Belgium (56%) and Luxembourg (53%) produced more films as majority co-producer than as fully national producer. In fact, the share of co-production was below European levels in just 13 countries.

In absolute terms, the top producing countries in Europe were also the main co-producer countries: France topped the list, with 566 co-productions from 2007-2016, followed by Spain (460), Germany (411) and Switzerland (221); only 11

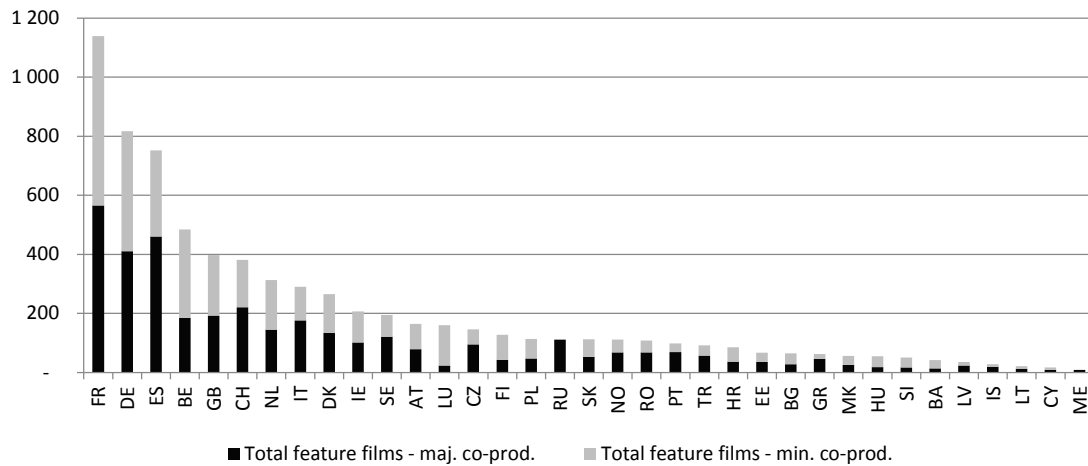
countries co-produced more than a yearly average of 10 films.

Figure 1. Top co-producing countries, 2007-2016



Most of the main film-producing countries in Europe shot an approximately even share of majority and minority co-productions over the period 2007-2016. Moreover, the share of minority co-productions out of the total number of co-productions in most European countries was between 35% and 55%, with just some small - and medium-size production countries shooting significantly more minority co-productions than majority co-productions (Belgium, Poland, Finland and Hungary).

Figure 2. European countries by number of co-productions broken down into majority and minority co-productions, 2007-2016



European film-producing countries interacted with 150 countries; An average 60% of the interactions were with other European countries.

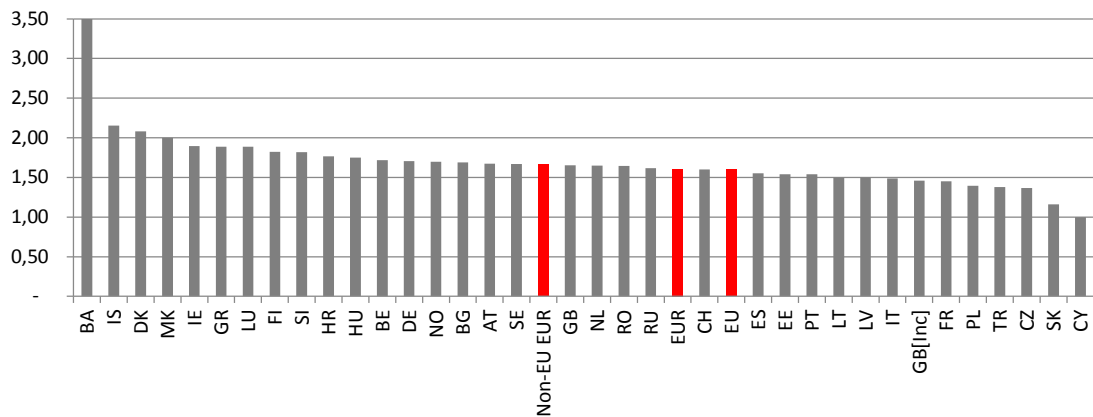
Using bilateral interaction as an indicator of cooperation between two countries, we note a total of 5 203 interactions involving the 3 236 co-production films shot in Europe between 2010 and 2015, with a theatrical release, involving 150 countries – 105 as majority co-producer and 142 as minority co-producer. However, only 11 European majority co-production countries interacted with more than 30 countries over this period.

On average, 40% of the interactions with other countries in the case of European majority co-productions were with non-European partners, with the US as the runaway non-European partner for European majority co-productions. In turn, French/Belgian co-productions clearly topped the ranking for most frequent co-production, with 207 such films between 2010 and 2015. British-American, Italian-French, French-German and Belgian-French productions completed the list of the top five most frequent co-production tie-ups, with the involvement of at least one European partner, over this period.

In terms of diversity, only four countries participated in European co-productions with more than 25 countries: Germany (31), the US (30), France (29) and the UK (26). Moreover, only 36 of the 142 countries involved in a European production as minority co-producer were involved in projects in 10 or more countries over the period 2010-2015.

The average number of co-production partners increased over the period covered; in the EU, it rose from an average 1.48 co-production partners in 2010, to 1.65 in 2015. A total of 27 countries were within a bracket of 1.45-two co-production partners on average, per co-production. The figure rose above two in only four countries.

Figure 3. Average number of co-production partners by main country of production, 2010-2015



24.2% of European co-productions accounted for 50.3% of overall admissions to European films

Co-productions accounted for 24.2% of overall film production volume in Europe over the period 2010-2015 (23.8% when excluding GB^{inc} productions); however, they generated 1 576 million admissions, i.e. 50.3% of overall attendance for European films during the period examined (34.9% when excluding GB^{inc} films). In addition, European co-productions generated three times as many admissions as purely European national films.

A total of 39.5% of the films produced in Europe between 2010 and 2015 received a theatrical release in a country other than the main production country; for majority co-productions the figure rises to 62.9%, i.e. 1 464 films over the period analysed. On average, European co-productions circulate almost twice as widely as purely national productions (32.1%). The overall foreign release territories average for European co-productions was 6.43.

2. Synthèse

La production de films a augmenté de 47 % en Europe en dix ans

Plus de 18 000 films ont été produits en Europe entre 2007 et 2016, et la production globale sur l'Europe s'est accrue de 47 %, passant de 1 444 longs métrages en 2007 à 2 124 en 2016. Cette tendance à la hausse a été enregistrée pour la plupart de cette période tant pour les productions purement nationales que pour les coproductions. Les coproductions majoritaires ont représenté 20,4 % du volume de production total sur l'Europe pour cette période. Le volume de documentaires a quasiment doublé, atteignant 698 films en 2016, tandis que la production de films de fiction a également connu un essor important de 33 %.

Les 10 premiers pays producteurs représentaient 73 % du volume total

Les cinq premiers pays producteurs d'Europe – le Royaume-Uni, la France, l'Allemagne, l'Espagne et l'Italie – ont représenté 53,6 % de la production globale des 36 pays couverts par l'étude tandis que les 10 premiers pays producteurs ont été à l'origine de 73 % des films tournés entre 2007 et 2016. 18 pays au total ont produit moins que la moyenne de 25 films annuels durant cette période. Un déclin de la production entre 2007-2008 et 2015-2016 a été enregistré dans seulement cinq des 36 pays couverts (le Royaume-Uni, la Belgique, la Norvège, l'Estonie et la Hongrie). En outre, 10 pays ont plus que doublé leur volume de production. La majorité des pays de production ayant enregistré la croissance la plus rapide était des pays d'Europe de l'est.

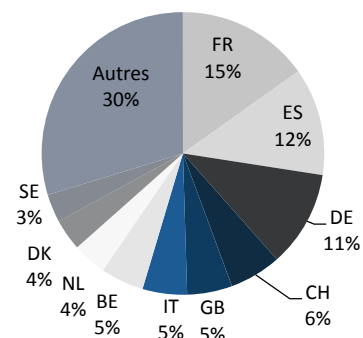
Les coproductions majoritaires en Europe

Seuls la Belgique (56 %) et le Luxembourg (53 %) ont produit davantage de films en tant que coproducteur majoritaire que producteur entièrement national. La part des coproductions a été inférieure à la moyenne européenne dans 13 pays seulement.

En termes absolus, les principaux pays producteurs d'Europe sont aussi les principaux pays de coproduction : la France s'est placée en tête, avec 566 coproductions entre 2007 et 2016, suivie de l'Espagne (460), l'Allemagne (411) et

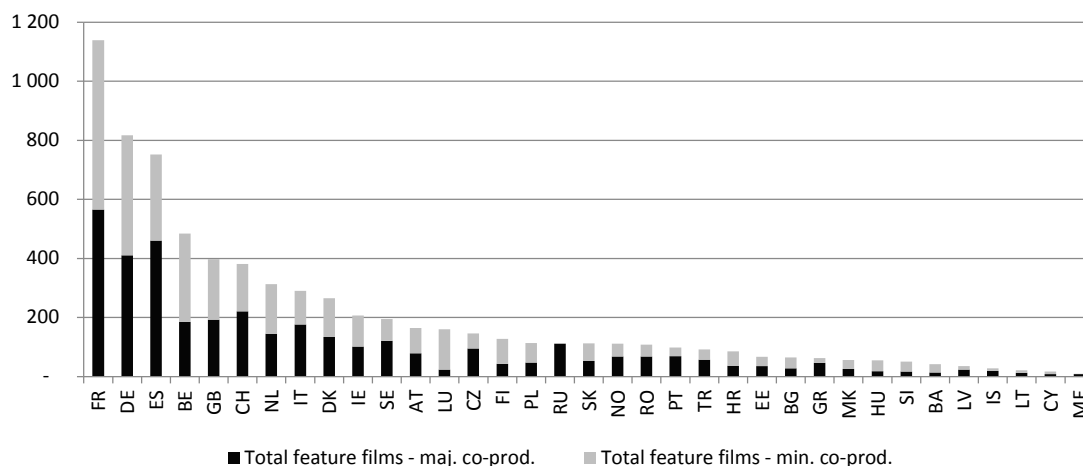
la Suisse (221) ; seuls 11 pays ont coproduit plus de 10 films par an en moyenne.

Figure 4. Principaux pays de coproduction, 2007-2016



La majorité des principaux pays producteurs de films en Europe ont produit environ la même proportion de coproductions majoritaires que minoritaires sur la période 2007-2016. En outre, la part de coproductions minoritaires dans le nombre total de coproductions s'est située entre 35 % et 55 % dans la plupart des pays d'Europe. Dans un nombre limité de pays de production de taille petite ou moyenne, la part des coproductions minoritaires était toutefois bien plus élevée que celle des coproductions majoritaires (Belgique, Pologne, Finlande, Hongrie, Luxembourg).

Figure 5. Pays européens par nombre de coproductions, réparti entre coproductions majoritaires et minoritaires, 2007-2016



Les pays européens producteurs de films ont collaboré avec 150 pays ; en moyenne, 60 % de ces collaborations se sont faites avec d'autres pays européens

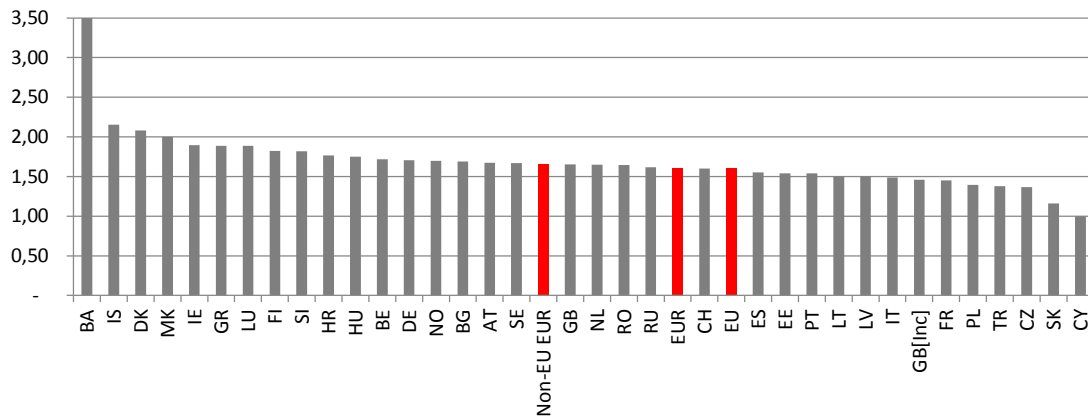
En utilisant la collaboration bilatérale comme indicateur de coopération entre deux pays, on relève un total de 5 203 collaborations, portant sur les 3 236 coproductions tournées en Europe entre 2010 et 2015 et sorties en salle, ayant impliqué 150 pays – 105 en tant que coproducteurs majoritaires et 142 en tant que coproducteurs minoritaires. Néanmoins, seuls 11 pays de coproductions majoritaires ont collaboré avec plus de 30 pays sur cette période.

En moyenne, 40 % des interactions avec d'autres pays dans le cas des coproductions majoritaires européennes ont impliqué des partenaires non européens, les États-Unis étant de loin le principal partenaire non européen dans les coproductions majoritaires européennes. Ensuite, les coproductions France-Belgique étaient clairement en tête du classement des coproductions les plus fréquentes, avec 207 films entre 2010 et 2015. Les productions Royaume-Uni-États-Unis, Italie-France, France-Allemagne et Belgique-France complétaient la liste des cinq modèles de coproduction les plus fréquents, associant au moins un partenaire européen, sur cette période.

En termes de diversité, seuls quatre pays ont participé à des coproductions européennes avec plus de 25 pays : l'Allemagne (31), les États-Unis (30), la France (29) et le Royaume-Uni (26). De plus, seuls 36 des 142 pays ayant participé à une production européenne en tant que coproducteur minoritaire ont pris part à des projets dans 10 pays ou plus durant la période 2010-2015.

Le nombre moyen de partenaires de coproduction a augmenté sur la période : dans l'UE, il est passé de 1,48 partenaires en moyenne en 2010 à 1.65 à 2015. 27 pays au total se sont situés dans une fourchette allant de 1.45 à deux partenaires de coproduction en moyenne par coproduction. Ce chiffre était supérieur à deux dans quatre pays seulement.

Figure 6. Nombre moyen de partenaires de coproduction par principal pays de production, 2010-2015



24,2 % de coproductions européennes ont généré 50,3 % du total des entrées en salle des films européens

Les coproductions ont représenté 24,2 % du volume global de production de films en Europe sur la période 2010-2015 (23,8 % si l'on exclut les productions GB^{inc}) ; elles ont cependant généré 1 576 millions d'entrées, soit 50,3 % des entrées totales des films européens sur la période examinée (34,9 % sans les films GB^{inc}). De plus, les coproductions européennes ont généré trois fois plus d'entrées que les films européens uniquement nationaux.

39,5 % des films produits en Europe entre 2010 et 2015 sont sortis en salle dans un pays autre que leur pays de production principal ; pour les coproductions majoritaires, ce chiffre monte à 62,9 %, soit 1 464 films sur la période considérée. En moyenne, les coproductions européennes circulent près de deux fois plus que les productions purement nationales (32,1 %). En moyenne, les co-productions européens sont sortis dans 6,43 territoires étrangers.

3. Zusammenfassung

Filmproduktion in Europa boomt: 47% Wachstum in den letzten 10 Jahren

Von 2007 bis 2016 wurden in Europa mehr als 18 000 Filme produziert; die Produktion stieg insgesamt von 1 444 auf 2 124 Spielfilme, was einer Zunahme von 47% entspricht. Fast im gesamten Zeitraum war ein Aufwärtstrend bei rein nationalen Produktionen sowie bei Koproduktionen festzustellen. Im genannten Zeitraum entfielen in Europa 20,4% des gesamten Produktionsvolumens auf Mehrheitskoproduktionen. Das Volumen der produzierten Dokumentarfilme hat sich nahezu verdoppelt und lag 2016 bei 698 Filmen, doch auch bei der Produktion von Spielfilmen gab es signifikante Zuwächse (33%).

Die 10 größten Produktionsländer erbringen 73% des gesamten Produktionsvolumens

Auf die fünf größten europäischen Produktionsländer - das Vereinigte Königreich, Frankreich, Deutschland, Spanien und Italien - entfielen 53,6% der Gesamtproduktion in den von der Untersuchung erfassten Ländern; und auf die zehn größten Produktionsländer entfallen 73% der von 2007 bis 2016 gedrehten Filme. Insgesamt 18 Länder lagen im genannten Zeitraum unter dem Durchschnitt von 25 Filmen pro Jahr. In lediglich fünf der erfassten 36 Länder war von 2007 bis 2008 und von 2015 bis 2016 ein Rückgang der Produktion zu verzeichnen (im Vereinigten Königreich, in Belgien, Norwegen, Estland und Ungarn). Darüber hinaus hat sich in 10 Ländern das Produktionsvolumen mehr als verdoppelt, wobei die Länder mit dem größten Produktionswachstum in Osteuropa liegen.

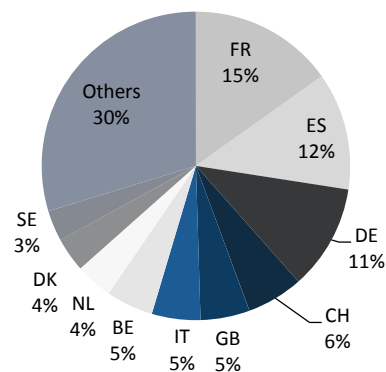
Mehrheitskoproduktionen in Europa

Nur Belgien (56%) und Luxemburg (53%) waren häufiger Mehrheitsproduzent von Koproduktionen als Produzent von rein nationalen Produktionen. Der Koproduktionsanteil lag lediglich in 13 Ländern unter dem europäischen Durchschnitt.

Absolut gesehen waren in Europa die größten Produktionsländer auch die wichtigsten Koproduktionsländer: Frankreich liegt mit 566 Koproduktionen auf dem ersten Platz, gefolgt von Spanien (460), Deutschland (411) und der Schweiz (221); nur 11 Länder haben im

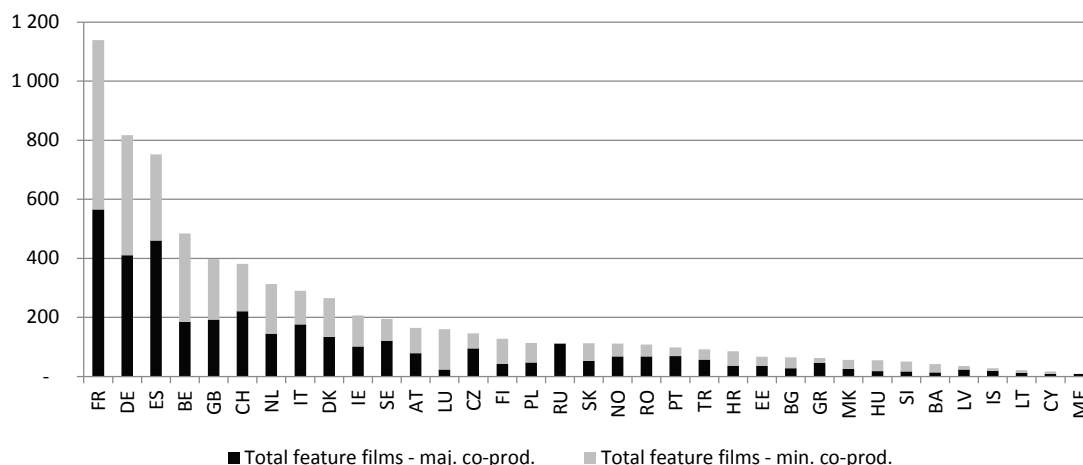
Durchschnitt mehr als 10 Filme pro Jahr koproduziert.

Figure 7. Die größten Koproduktionsländer, 2007-2016



In den meisten wichtigen Produktionsländern in Europa wurden im Zeitraum von 2007 bis 2016 ungefähr gleich viel Mehrheits- und Minderheitsproduktionen hergestellt. Der Anteil der Minderheitsproduktionen an der Gesamtzahl der Koproduktionen lag dabei in den meisten europäischen Ländern zwischen 35% und 55%, wobei in einigen kleineren und mittelgroßen Produktionsländern signifikant mehr Minderheits- als Mehrheitsproduktionen entstanden (Belgien, Polen, Finnland und Ungarn).

Figure 8. Europäische Länder nach Anzahl der Koproduktionen: Minderheits- und Mehrheitsproduktionen, 2007 - 2016



Die europäischen Produktionsländer hatten Kontakte zu 150 Ländern; in durchschnittlich 60% der Fälle handelte es sich um Kontakte zu anderen europäischen Ländern

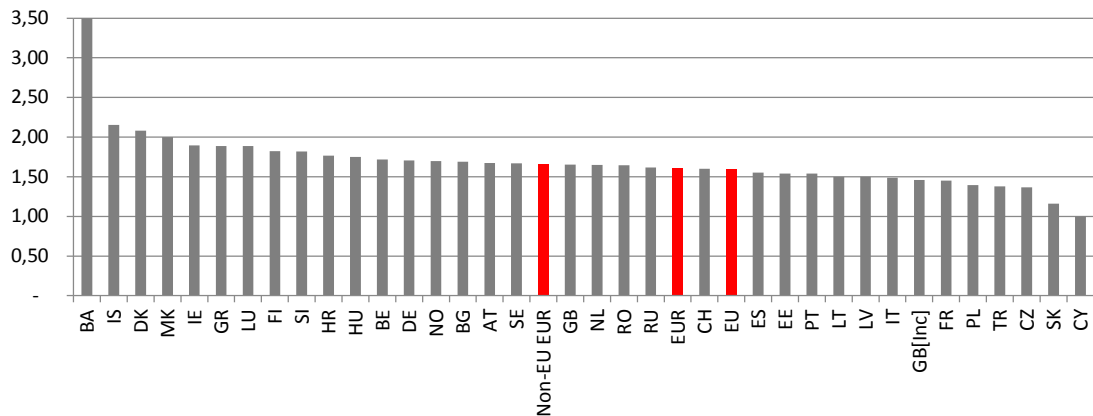
Betrachtet man bilaterale Kontakte als einen Indikator für Zusammenarbeit zwischen zwei Ländern, so lässt sich feststellen, dass es im Zeitraum von 2010 bis 2015 im Zusammenhang mit den 3 236 europäischen Koproduktionen, die im Kino gezeigt wurden und an denen 150 Länder beteiligt waren – 105 als Mehrheitsproduzent und 142 als Minderheitsproduzent –, insgesamt 5 203 Kontakte gab. Doch nur 11 europäische Länder, die als Mehrheitsproduzent fungierten, hatten in dieser Zeit Kontakte zu mehr als 30 Ländern.

Im Falle von europäischen Mehrheitsproduktionen waren im Durchschnitt 40% dieser Kontakte Beziehungen zu nichteuropäischen Partnern, wobei die USA der bevorzugte nichteuropäische Partner für europäische Mehrheitsproduktionen waren. Andererseits lagen französisch-belgische Koproduktionen mit 207 Gemeinschaftsproduktionen in der Zeit von 2010 bis 2015 ganz eindeutig an der Spitze. Zu den fünf häufigsten Koproduktionsformationen mit mindestens einem europäischen Partner in diesem Zeitraum zählten daneben noch englisch-amerikanische, italienisch-französische, französisch-deutsche und belgisch-französische Koproduktionen.

In Bezug auf Aspekte der Vielfalt lässt sich sagen, dass nur vier Länder an europäischen Koproduktionen mit mehr als 25 Ländern beteiligt waren: Deutschland (31), die USA (30), Frankreich (29) und das Vereinigte Königreich (26). Ferner waren von 2010 bis 2015 nur 36 der 142 Länder, die als Minderheitsproduzent europäischer Produktionen auftraten, an Projekten in 10 oder mehr Ländern beteiligt.

Die durchschnittliche Anzahl der Koproduktionspartner hat im betrachteten Zeitraum zugenommen; in der EU stieg sie von 2010 bis 2015 von durchschnittlich 1,48 auf 1,65. Insgesamt 27 Länder lagen im Bereich von durchschnittlich 1,45 bis 2 Koproduktionspartnern pro Koproduktion. In nur vier Ländern lag dieser Wert über 2.

Figure 9. Anzahl der Koproduktionspartner im Durchschnitt nach Hauptproduktionsland, 2010 - 2015



24,2% der europäischen Koproduktionen erreichen 50,3% aller Besucher europäischer Filme

Im Zeitraum 2010 bis 2015 machten Koproduktionen 24,2% des gesamten Produktionsvolumens in Europa aus (ohne GB^{inc} Produktionen 23,8%); diese Filme wurden jedoch von 1 576 Mio. Besuchern gesehen – das sind 50,3% sämtlicher Besucher europäischer Filme im Betrachtungszeitraum (ohne GB^{inc} Filme 34,9%). Darüber hinaus erreichten europäische Koproduktionen dreimal so viele Besucher als rein europäische nationale Filme.

Insgesamt wurden 39,5% der in Europa von 2010 bis 2015 produzierten Filme in einem anderen Land als dem Land des Hauptproduzenten im Kino gezeigt; bei Mehrheitsproduktionen erhöht sich dieser Wert auf 62,9% bzw. 1 464 Filme im Betrachtungszeitraum. Die Verbreitung europäischer Koproduktionen ist nahezu zweimal besser als die rein nationaler Produktionen (32,1%). Im Durchschnitt wurden europäische Koproduktionen im Ausland in 6,43 Ländern verbreitet.

4. Introduction

The European Audiovisual Observatory covers closely any trend related to feature film production volume in Europe. Thanks to the data provided mostly by the national film or statistical centers in most European countries, we are able to produce pan-European statistics on a yearly basis on the evolution of production. Beginning with *Focus. World Film Market Trends*¹, published by the Cannes Film Market, the Observatory provides an estimate of the film production levels not only in the EU, but also across the world, region by region, as well as in the main production countries. Later in the year, production figures for each European country are published in our electronic Yearbook.²

This report goes several steps further, beyond the usual reporting of national and overall figures.

First, the different angles involved in film production (nationality and type of production – purely national, majority co-production and minority co-production) have been analysed. This answers questions related to for example the weight of co-production in Europe, and allows identification of the main co-production countries in absolute and relative terms.

Second, when it comes to international co-productions, the interactions between countries and their frequency have been studied. How many countries do European countries co-produce with on average? What are the more frequent interactions between production countries? What portion of co-production partners for European films are non-European countries? These are some of the questions answered in this part of the analysis.

Last, the circulation and admissions of European productions and co-productions have been assessed; not only in the European markets, but also in a selection of the main non-European markets for which data was available (including the USA, Canada, Brazil, South Korea and Australia, among others). This permits an unveiling of the average number of countries of release for European films, as well as the breakdown of admissions across domestic, non-national European and non-European markets.

¹ http://www.obs.coe.int/en/industry/film/-/asset_publisher/ryUnLWiFD0p/content/focus-world-film-market-trends?

² <http://yearbook.obs.coe.int/>

5. Scope and methodology

5.1. Two different sets of figures

Two different sets of figures were used for the analysis. On the one hand, the data provided by the national film centers/statistical centers of each country were used to determine production volume within each country, in the EU and in Europe. The second set of figures was produced using **Lumière**³, the European Audiovisual Observatory's database for theatrical admissions. It was used to carry out the analysis of the interaction between countries for majority and minority co-productions, as well as to establish links between production and market share.

The first set of figures is closer to real production, since it takes into account the actual production volume in most countries, regardless of whether or not the films were released, and the number of productions released in some others; however, it does not offer a breakdown of co-production by nationality of the co-producing partners. In turn, the second set of figures, based on title-by-title information, allows for the analysis of nationality of the producers involved but does not take into account films produced without a theatrical release.

In addition, occasionally the nationality of a film as stated by a national film center differs from the nationality allocated by the Observatory in the Lumière database. Therefore, even if we restricted our analysis to films produced and released, there could be a discrepancy between the data provided by the national film centers and those calculated using **Lumière**.

5.2. Scope

The analysis of production volume was carried out taking into account 36 European producing countries⁴. Moreover, attendance and circulation figures for 47 markets, including key non-European ones, were taken into account⁵.

³ www.lumiere.obs.coe.int

⁴ The 28 EU countries plus Bosnia and Herzegovina, Iceland, "The former Yugoslav Republic of Macedonia", Montenegro, Norway, Russia, Turkey and Switzerland.

⁵ All 36 European countries covered for production volume except for Malta plus Argentina, Australia, Brazil, Canada, Chile, China, Colombia, Mexico, New Zealand, South Korea, the United States of America and Venezuela.

The period 2007-2016 was used for the analysis of production volume, while the period 2011-2015 was scrutinised for the second part of the analysis, focused on circulation and admissions. There are two reasons for this: first, the coverage rate in the Lumière database has improved over time, so the same level of accuracy could not have been ensured for the entire 2007-2016 period with regard to related indicators. Second, a significant portion of the films produced in 2016 had not been released by the end of that year, so films produced in 2016 were not included.

5.3. Data sources

Data on production volume was provided by the corresponding national institution in charge of film statistics (national film center, national film fund, statistical office, ministry of culture, etc.). Data on film admissions came from the European Audiovisual Observatory's Lumière database, the data of which is drawn from a wide variety of sources, including national film agencies and statistics offices, inter-industry bodies, distributors' and exhibitors' associations, the trade press and a small number of private tracking bodies. This is supplemented by data from the European Union's MEDIA Programme, on the basis of declarations made by distributors to its Automatic Distribution Support scheme. The admissions data for the 11 non-European markets covered in this report have been licensed by private tracking body ComScore.

5.4. Year and country of production

The methodology used to determine the year of production varies from country to country. Some take into account the date of principal photography, others consider the date of registration or certification. In some cases, when this information is not available, the year of release is taken into account.

As indicated above, two sets of figures were used to produce this report. With respect to production volume, we relied on the data provided by the national institutions in charge of film statistics and we accepted the information they provided regarding year of production and nationality of the films produced and co-produced. It is therefore possible that the same film was considered a majority co-production by more than one country depending on the methodological criteria employed.

However, in considering circulation and admissions, we rely on the European Audiovisual Observatory's Lumière database, in which each film is allocated a unique country of origin. Defining the nationality of a film is a complex task. There are no widely accepted international or even European definitions of the criteria to be used to determine the country of origin of a film. This is both a legal and a statistical problem. Different national records - and the statistics on which they are based - can show the same film as having a whole range of nationalities. For a general pan-European database such as Lumière, we have had to adopt a pragmatic approach. We try to list all co-producing countries in the database in a standard way, and we attempt to classify them

by level of financial investment in the film (whether known or assumed), with the country having provided the majority financial investment in the production in first place. This, for e.g., a FR / DE co-production is considered a French film in the Lumière database. In the case of international co-productions, the film is assigned to the country that provided the majority share of production financing.

Please note that the allocation of a country of origin in the Lumière database may differ from the allocation applied by national film agencies or other organisations, and so may thus any statistics related to country of origin.

5.5. Majority and minority co-productions

Again, different methodologies were used for the two sets of data subjected to analysis. With regard to production volume, the number of majority and minority co-productions for each country was extrapolated directly from the figures reported by the statistical unit within the national film center or equivalent institution in each country; it is therefore possible that, exceptionally, the same production was considered a majority production by more than one of the co-producing countries, notably in cases in which there was equal or comparable financial involvement on the part of the two main producing countries.

With respect to the number of admissions and circulation, Lumière data were used in the analysis. Designation of majority and minority co-production status in the Lumière database is approached as follows: A co-production is defined as a film for which the production budget was financed by sources from two or more countries. The country providing the majority of the financing, i.e. the majority co-production country, is considered to be the country of origin. In the case of equal co-production, the nationality of the director and subsidiarily the cultural content of the film are used to determine the country to which the film is allocated, on a case-by-case basis.

The Observatory identifies co-productions on the basis of information provided by various sources. When a new film is created the system will, by default, import the countries of origin as indicated in the Internet Movie Database (IMDb). These data are consequently checked and adjusted through the use of information provided by national film agencies and / or the trade press. As a consequence, the qualification of a film as a co-production and its allocation to a specific country of origin by the Observatory may differ from co-production listings published by other sources.

There is an important distinction between the quantification of majority and minority co-productions because the majority co-producing country is a univocal variable; that is, there is only one main co-producing country. However, several countries can participate in a film as minority co-producers. So, the sum of minority co-productions participated in by each country will be significantly higher than the actual number of minority co-productions.

5.6. Inward production

The analysis did not take into account inward production - feature films produced by companies established outside the country in which they are fully or partially shot without the involvement of a local producer in the financing of the film. This type of production involves the receiving country as a shooting location for diverse reasons (infrastructure, low production costs, set and location needs, fiscal incentives, etc.), but there is no involvement of a local partner in the financing of the film.

5.7. Incoming investment productions

The 'inc' marker is a contraction of 'incoming investment'. An 'incoming investment' film is defined as one for which the main producer is a company established in a country but under the ownership and/or control of a company registered in another country. Thus, a film categorised as GB inc / US is a film produced in the United Kingdom (GB), for which the main producer is a United Kingdom-registered company which may be wholly or partially owned or controlled by a US company. A FR inc / US film is a work produced in France (FR) for which the main producer is French-registered company wholly or partially owned or controlled by a US company. A film categorised as US / GB inc is a work produced entirely or partly in the United Kingdom for which the main producer is a US-registered company acting through a UK-registered company established specifically for the production of the work.

5.8. Comparisons between 2007-2008 and 2015-2016

Since production volume, especially in some countries, is an indicator subject to high fluctuation, biennia, instead of individual years, have been used to calculate the comparison between the beginning and the end of the time period analysed. Thus, instead of a comparison between 2007 and 2016, the average for the years 2007 and 2008 was contrasted with the average for the years 2015 and 2016, in several sections of the analysis.

6. Production volume

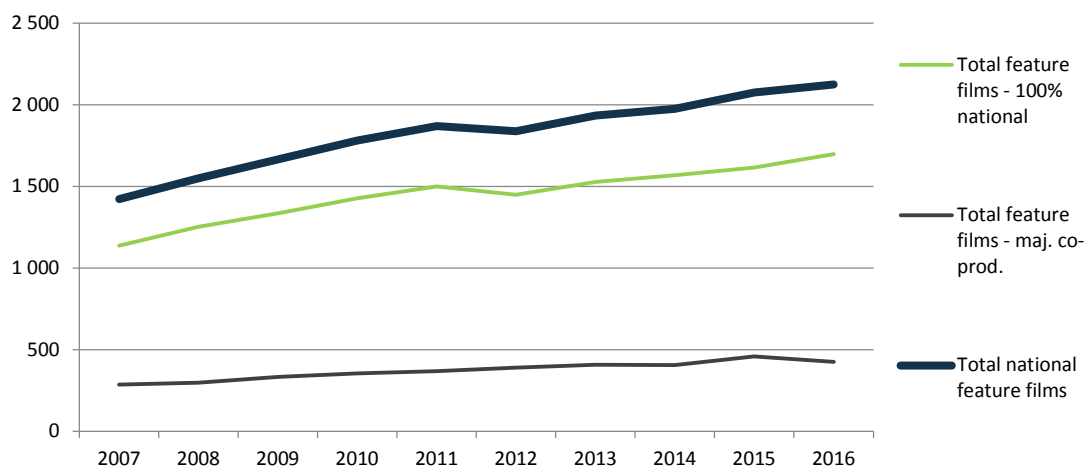
6.1. Overall production volume in Europe

Production boomed in Europe, by 47%, over 10 years

More than 18 000 films were produced in Europe between 2007 and 2016, with overall production in Europe going from 1 422 feature films in 2007 to 2 123 in 2016⁶ - a 49% hike. The volume of documentaries boomed over that period, almost doubling to 698 films in 2016, while production of feature fiction also rose significantly, by 33%, to 1 426 films in 2016. In fact, the documentaries share of overall production increased from 25% in 2007 to 33% in 2016. By contrast, the majority co-production share of the total production volume in Europe remained relatively constant over the 10-year period, between a low 19.2% in 2008 and a 22.1% high in 2015 (20% in 2016).

Figure 10. Evolution of production volume in Europe by type of production (total, 100% national and majority co-production), 2007-2016

In number of films



The overall number of national productions for a country can be broken down into fully national productions (14,505 between 2007 and 2016) and majority co-productions (3,724 over the same period) – i.e. 20.4% of total national production in Europe. Minority co-productions participated in by European countries were not taken into account for the

⁶ These sets of figures may include some double counts, as different countries may consider a same film as a majority co-production in their countries.

calculation of the overall production volume in Europe for two reasons first and foremost, to avoid double counts - any minority co-production of one country is simultaneously a majority co-production of another country; second, while the country of the majority co-producer is a univocal indicator, several countries may be involved in a co-production as minority co-producers.

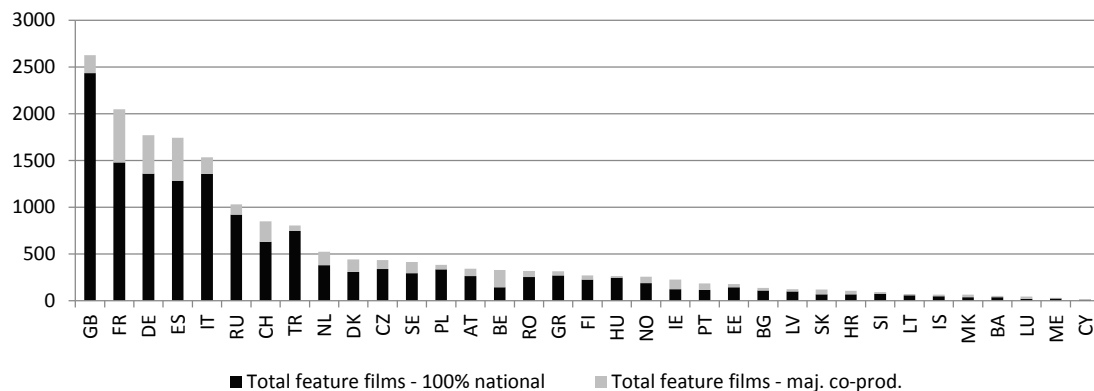
6.2. Producing countries and growth

The top 5 countries account for 53.6% of overall production in Europe

The top five European producing countries –the UK, France, Germany, Spain and Italy - accounted for 53.6% of overall production in the 36 countries covered in the analysis. These same countries were also the only ones with production figures above 1 500 films between 2007 and 2016. Moreover, the top 10 producing countries accounted for 73% of films shot between 2007 and 2016. A total of 18 countries produced fewer than an average of 25 films a year during that period.

Figure 11. Feature film production volume in Europe by country and type of production (100% national and majority co-production), 2007-2016

In number of films



As can be seen in the two pie charts below, Spain and Turkey improved their position at the top, while the relative weight of British and Swiss production decreased over time. In overall terms, the concentration at the top remained the same, with the 26 countries outside the top 10 accounting for between 27% and 28% of overall production.

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Figure 12. Top producing countries, 2007-2016

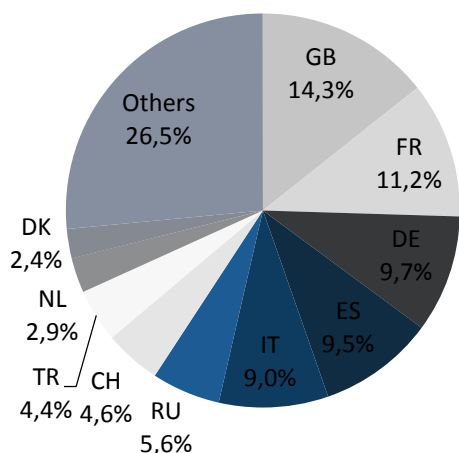
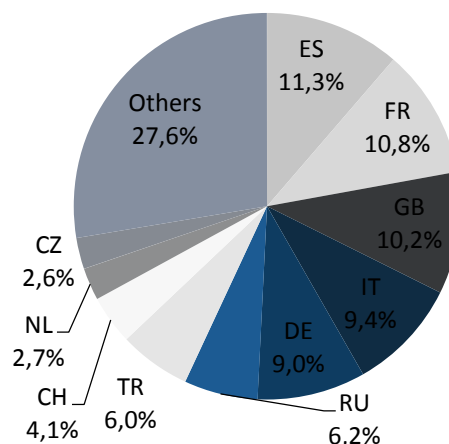
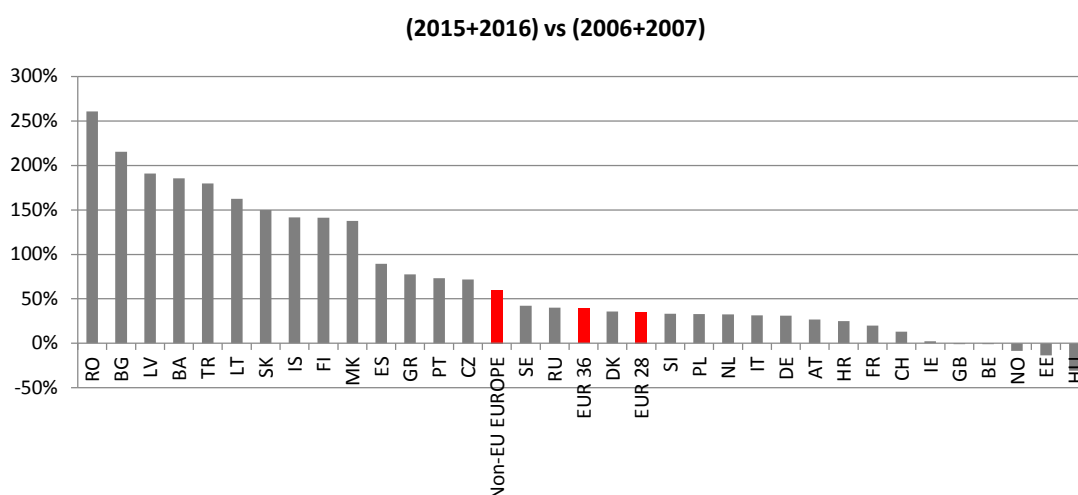


Figure 13. Top producing countries, 2015-2016



Only five of the 36 countries covered indicated a decline in production between 2007-2008 and 2015-2016 (the UK, Belgium, Norway, Estonia and Hungary). Moreover, 10 countries more than doubled their production volume over that period, with most of the fastest-growing producing countries located in Eastern Europe. At the pan-European level, there was 39% growth – 35% within the EU, 60% outside the EU, with Russia (40%) and, notably, Turkey (180%) at above average overall levels. In turn, all top producing countries in the EU, with the exception of Spain (89%) and Denmark (35.6%), showed growth below EU levels.

Figure 14. Production growth by country, comparing the first two and last two years of the series analysed (countries with more than an average of five films a year).

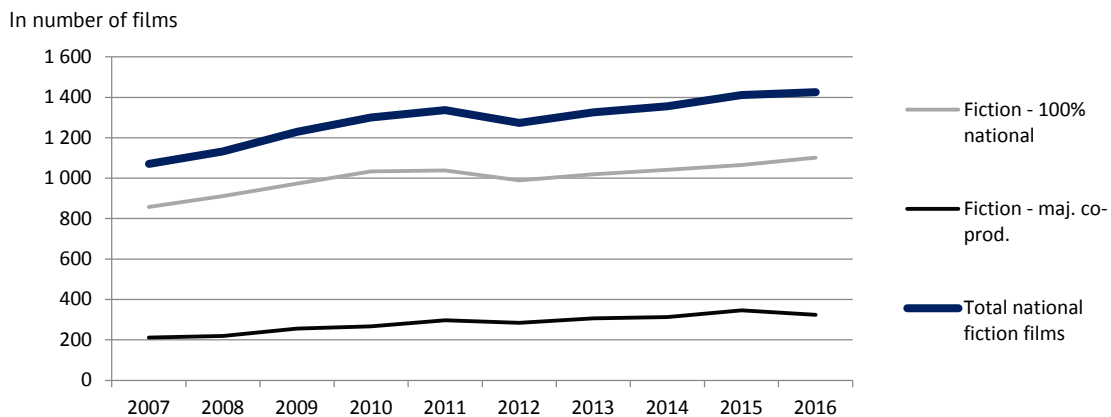


6.3. Feature fiction films

Fiction: Two-thirds of all feature films produced

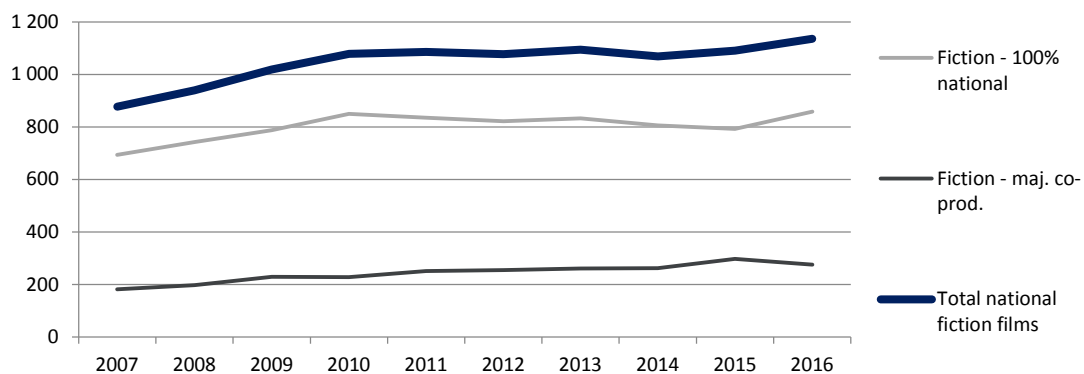
Except for a small decrease in 2012, European production of feature fiction films rose, constantly, over the 10-year period covered, with growth of majority co-productions since 2007 well above the overall 33% feature fiction film figure, at 52.5%, up to 324 in 2016.

Figure 15. Evolution of production volume of feature fiction films in Europe by type of production (total, 100% national and majority co-production), 2007-2016



Despite a rather flat trend for feature film production in the EU for several years, starting in 2010, overall European feature fiction figures kept growing because of a hike in non-EU countries, notably Russia, Turkey and Switzerland. However, this trend was reversed in 2016, with the EU production volume of feature films up again, compensating for stagnation in the two big non-EU markets (Russian and Turkey) and therefore consolidating the European upward trend. Moreover, another EU trend change occurred in 2016: the number of fully national productions grew significantly for the first time since 2010, while majority co-productions went down for the first time during the period analysed.

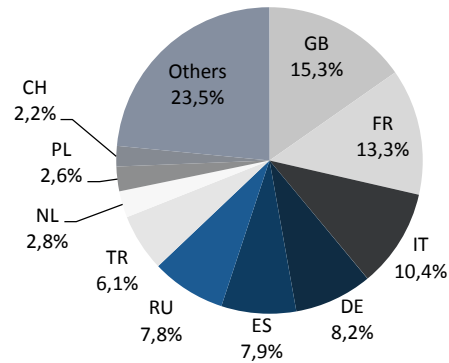
Figure 16. Evolution of production volume of feature fiction films in the EU by type of production (total, 100% national and majority co-production), 2007-2016



Most of the top 10 producers in Europe were also the top producers of feature fiction. In fact, countries' shares of overall production volume did not differ too much from shares of feature fiction production, with the exception of countries with well-above-average documentary production, such as Switzerland or Spain.

In addition, the concentration of production for the top 10 was slightly higher for feature fiction (76.5%), compared to overall production (73.5%).

Figure 17. Top producing countries for feature films, 2007-2016

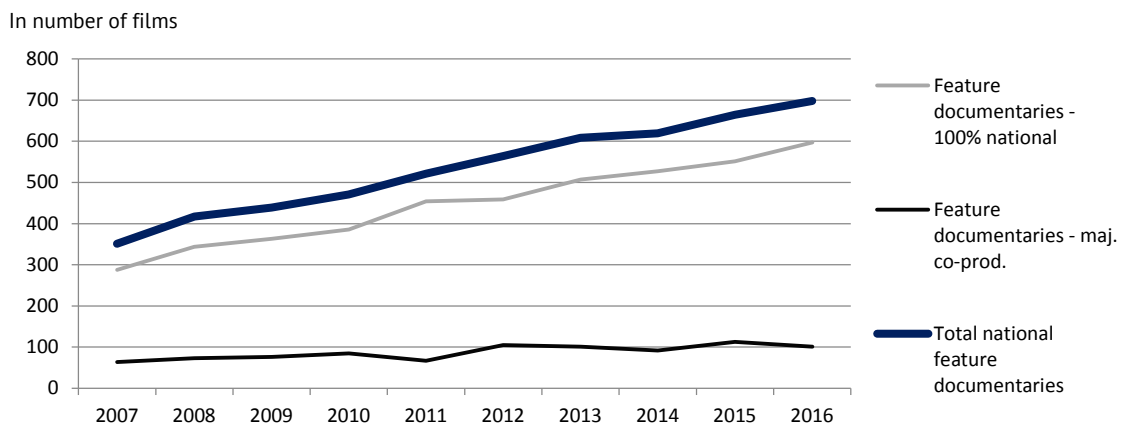


6.4. Documentary

The volume of documentaries increased significantly more than fiction, driven by 100% national films

The increase in documentary production volume was even sharper than that for feature fiction, with figures almost doubling over the period 2007-2016, up to 698 films in 2016. Although the 57.8% 10-year growth figure for majority documentary co-productions was relatively similar to that for feature fiction production (52.5%), fully national documentary productions boomed over the period, from 287 in 2007 to 597 in 2016.

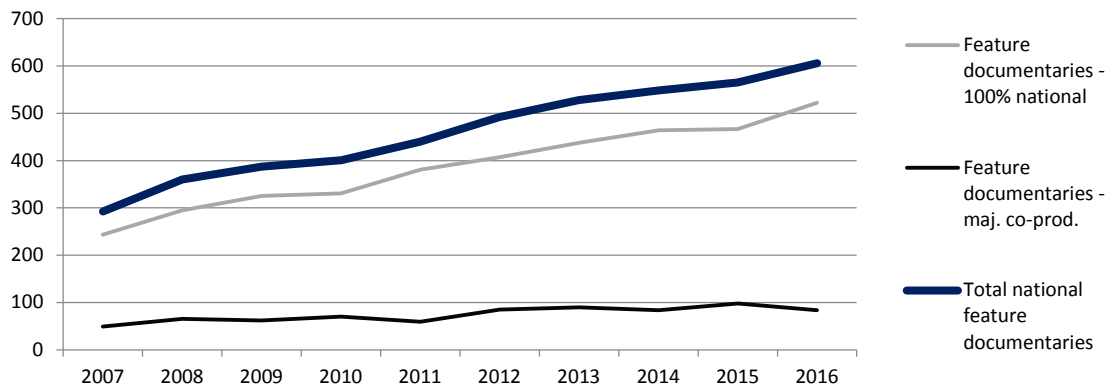
Figure 18. Evolution of production volume of feature documentary films in Europe by type of production (total, 100% national and majority co-production), 2007-2016



The trend was even more pronounced at the EU level, applicable to all of the top documentary producers, with overall documentary production growing by 107.3% over the 10-year period. Notably, as well, 14 EU countries displayed growth well above the EU average – especially relevant were some of the main production markets, such as Poland (up 700% between 2007 and 2016), Sweden (360%), the Czech Republic (286%), Italy

(277%) and Spain (264%). Only seven EU countries experienced a decrease in documentaries.

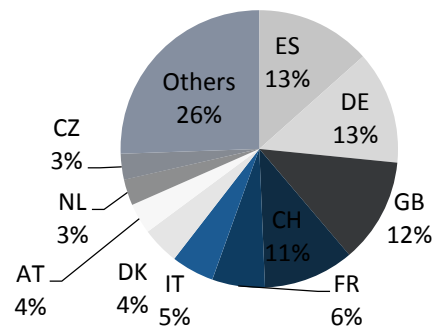
Figure 19. Evolution of the production volume of feature documentary films in the EU, 2007-2016



As mentioned above, documentary films accounted for 33% of the overall production volume in Europe in 2016 – and for 29% over the full 10-year period.

Most of the top producing countries in Europe in overall terms were also at the top of the list of countries by documentary production volume; Russia and Turkey – clearly specialised in feature fiction - did not make it into the top of the list. Other countries significantly improved their documentaries production position, notably Austria, Denmark and, in particular, Switzerland.

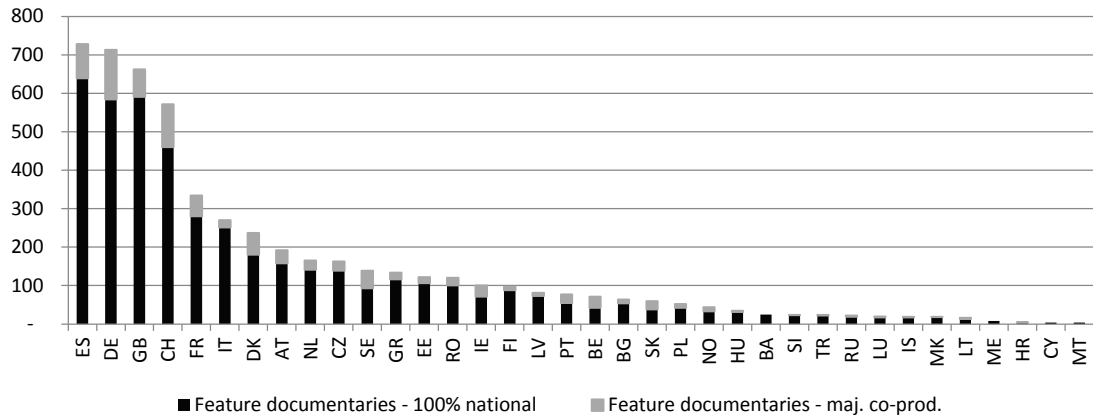
Figure 20. Top documentary producing countries, 2007-2016



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Figure 21. Feature documentaries by country and type of production, 2007-2016

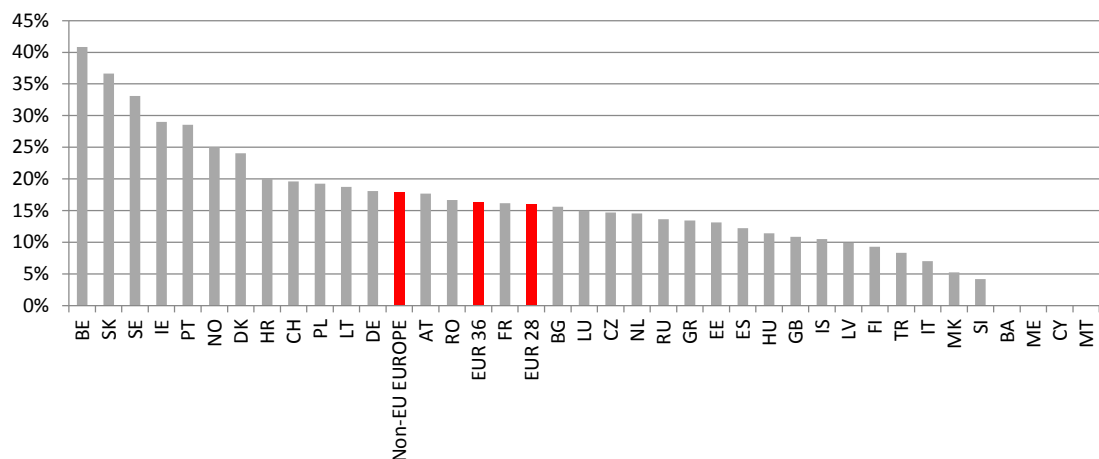
In number of films



Feature fiction more often co-produced than documentaries

The share of majority co-productions out of total documentary production in Europe between 2007 and 2016 lay at 16%, below the 20.4% recorded for overall production. By and large, the share of majority co-productions among feature documentaries was slightly lower than for overall production within each country (with a few exceptions, such as Sweden or Poland). In the few countries in which the difference was quite significant, this was due to a low (even negligible) production rate of documentaries – e.g. Malta, Slovenia, Cyprus or Macedonia. In rare cases, such as Luxemburg – a country with one of the highest shares of majority co-productions (53%) and substantial documentary production - only a small portion of documentaries fall into the majority producer category (15% for Luxemburg).

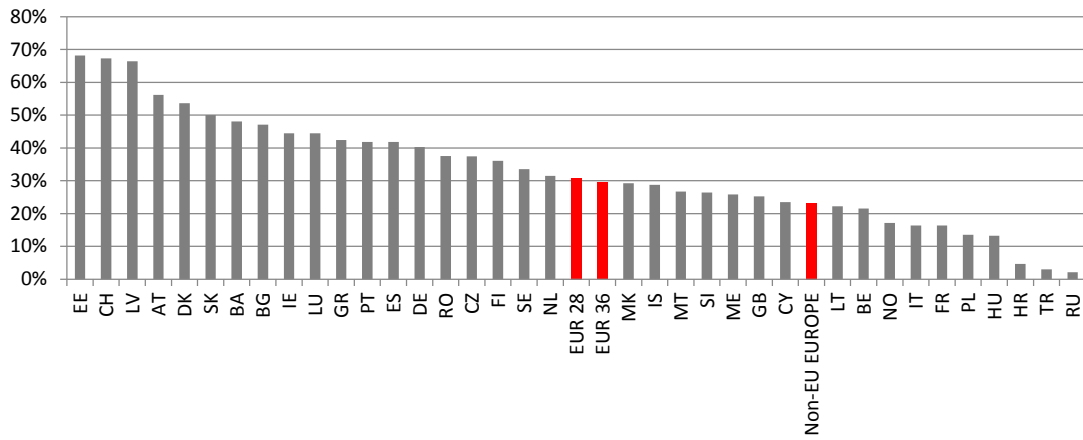
Figure 22. Majority co-production share of documentaries, by country, 2007-2016



A total of 30% of European productions between 2007 and 2016 were feature documentary films, with only five countries shooting more documentaries than feature fiction films (Denmark, Austria, Latvia, Switzerland and Estonia). Moreover, two of the top five producing countries – Spain (42%) and Germany (40%) – came in well above the European average share of documentaries. In addition, most territories with an average share of feature documentary production above 40% were countries with a medium or

low overall production volume.

Figure 23. Countries by share of documentary production, 2007-2016



7. Focus on co-production

7.1. Majority co-productions

Most countries produce more national films than majority co-production ones

Only two European countries produced more films as majority co-producer than as fully national producer: Belgium (56%) and Luxembourg (53%). In turn, the share of co-production was below European levels (20%) in just 13 countries, with only one of the top co-producers - the UK - among them.

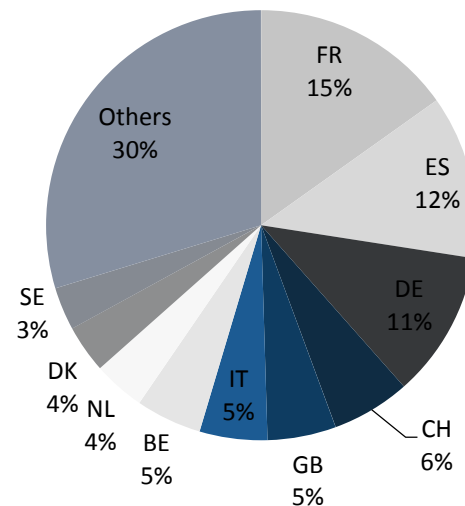
Three types of co-producer were distinguishable: 1) countries with few production resources (usually due to the size of the country and/or the production industry) which need a foreign partner for productions (Luxembourg, Cyprus, Slovakia, Montenegro, Iceland, etc.); 2) medium-sized production countries which try to maximise their production potential by seeking co-production with foreign partners (Belgium, Ireland, Portugal, Croatia, Denmark, Sweden, etc.); 3) Top producing countries which aim to maximise their production potential but with an industry and market that allow for a vast majority of fully national films. Not surprisingly, the share of co-production out of the total production volume in the top eight co-producing countries in Europe was below 30%, and in some cases, such as Turkey,

(7%), the UK (7%), Russia (11%) and Italy (12%), well below the European average of 20%.

Top producing countries are also the top co-producing countries

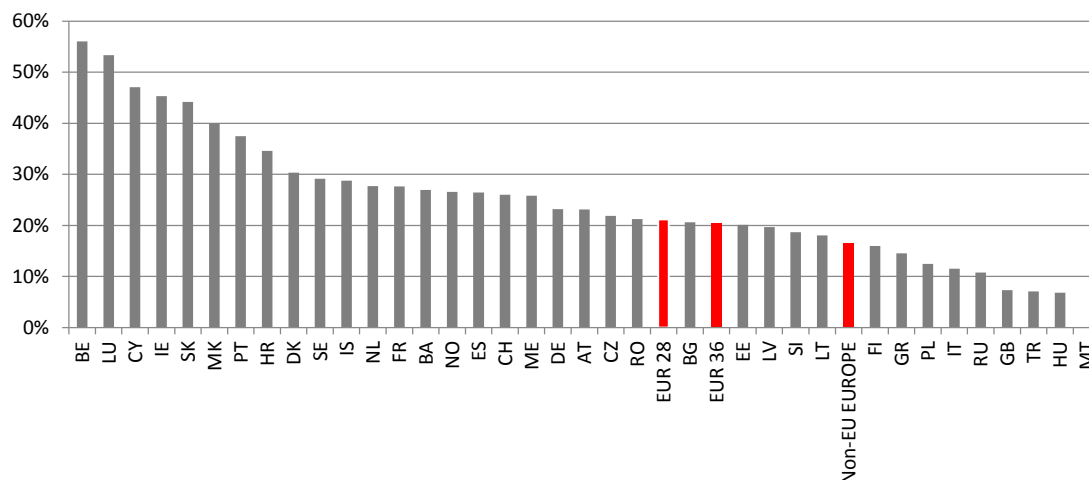
In terms of concentration, the top 10 co-producing countries in Europe accounted for 70% of overall co-production, slightly below the overall average of 27%, over the 2007-2016 period.

Figure 24. Top co-producing countries, 2007-2016



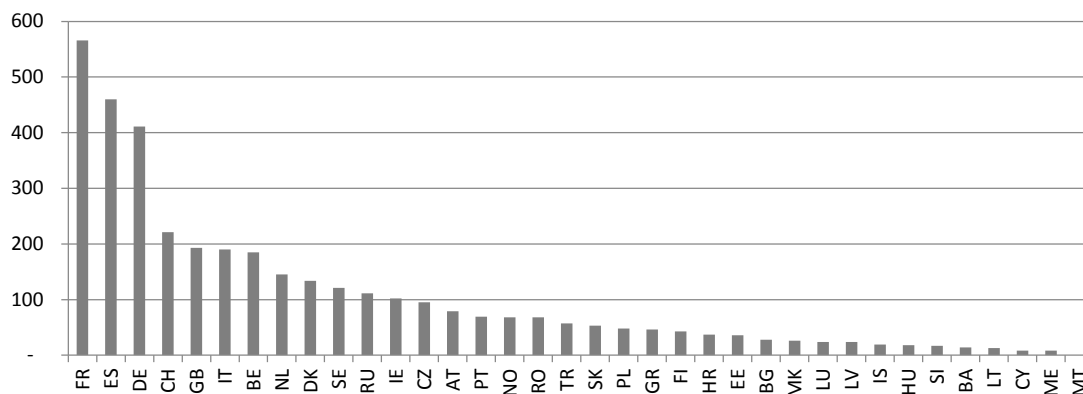
FILM PRODUCTION IN EUROPE

Figure 25. European countries by share of majority co-productions out of the total number of national productions, 2007-2016



In absolute terms, the top producing countries in Europe were, as expected, also the main co-producers, with France topping the list with 566 co-productions over the 2007-2016 period, followed by Spain (460), Germany (411) and Switzerland (221). Only 11 countries co-produced more than a yearly average of 10 films.

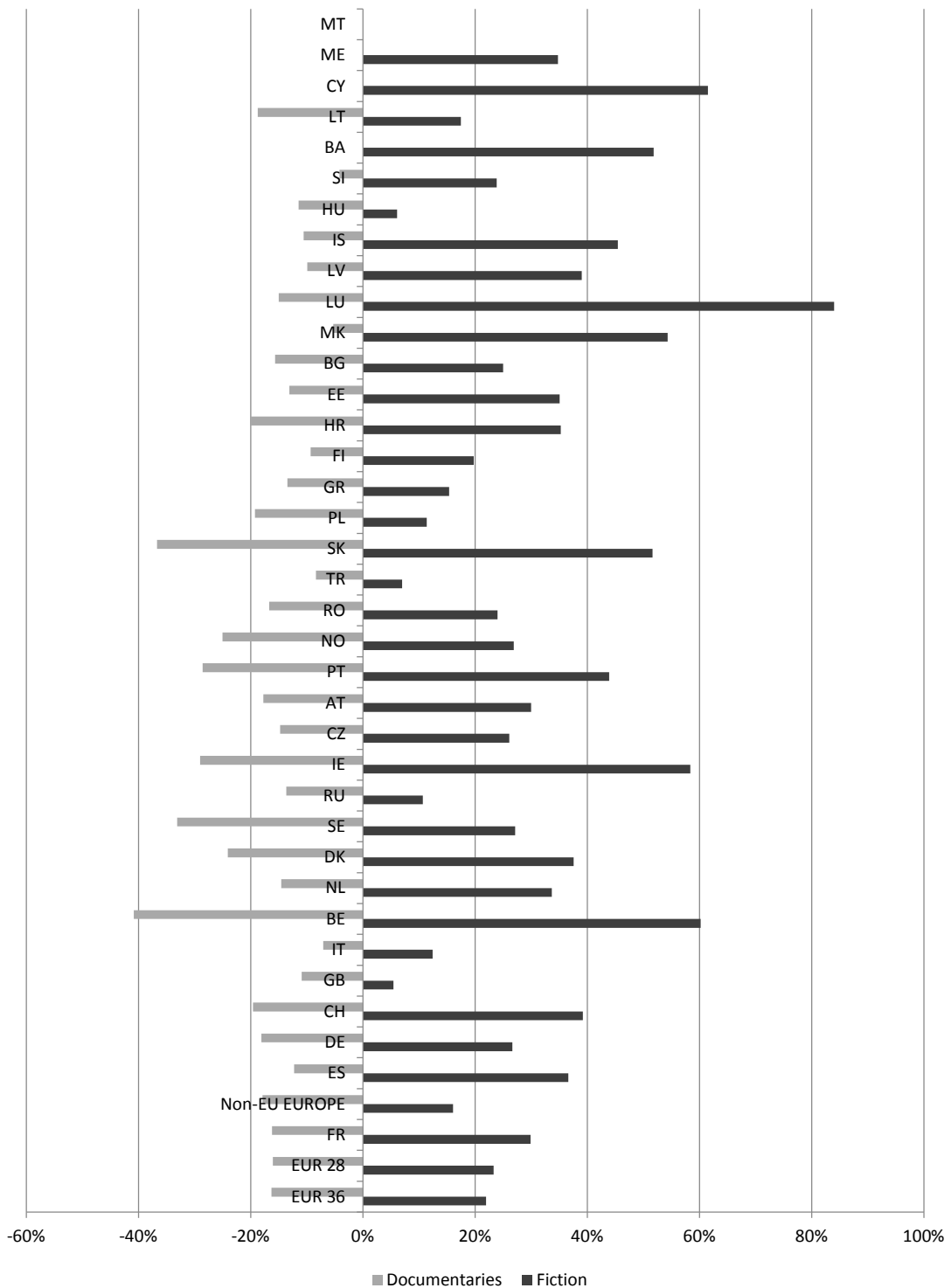
Figure 26. European countries by number of majority co-productions, 2007-2016



More co-production in feature fiction than in feature documentary

Most countries more often co-produced feature fiction than documentaries. At the European level, 22% of the feature fiction films were co-productions between different countries, compared to 16% in the case of feature documentaries. The most likely explanation is that feature fiction films are more expensive than documentaries and have a higher export potential – notably within the same linguistic area; therefore, international co-production becomes the perfect way to maximise revenues and close the financing plan. Moreover, in the few countries in which co-production of documentaries was higher than that of fiction films, the difference was relatively small (Hungary, Lithuania, Poland, Russia, Sweden, the UK and Turkey).

Figure 27. Countries by share of fiction and documentary co-production (out of overall production within each format), 2007-2016



7.2. Minority co-production

As mentioned in previous sections, minority co-productions were not taken into account in the calculation of the total number of productions of a country. However, this indicator is relevant in the definition of the production pattern of each country and was analysed for this section in connection to overall production and overall co-production (including majority and minority co-production). As already indicated, it was to be expected that the main producers would also emerge as the main co-producers, and also that the main co-producers as majority co-producers would populate the top of the list of production countries of minority co-productions.

Figure 28. European countries by number of co-productions broken down into majority and minority co-productions, 2007-2016

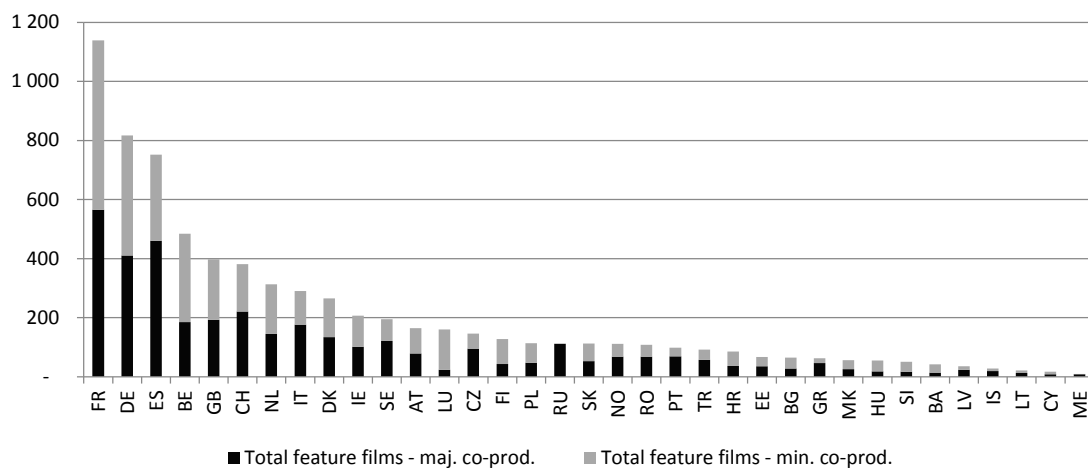
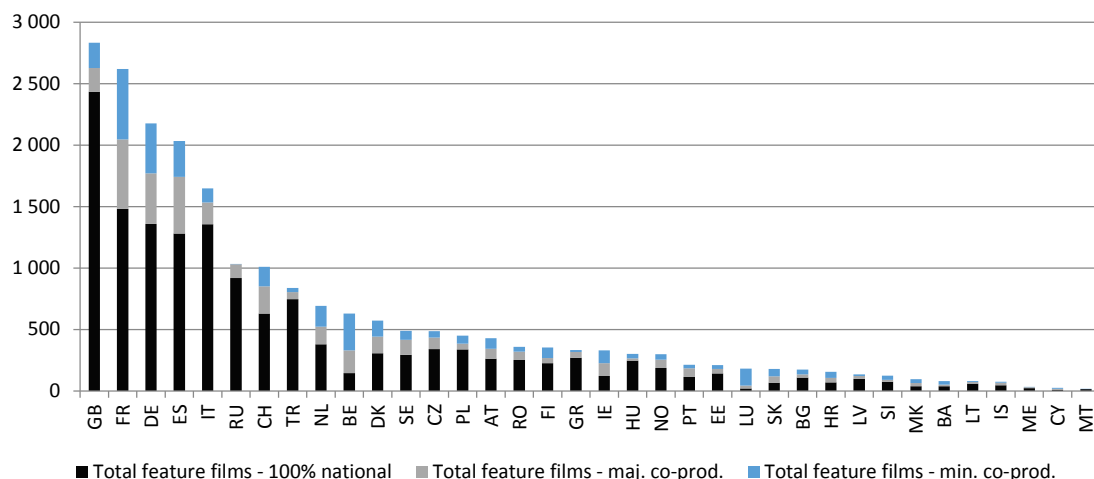


Figure 29. European countries by number of productions broken down into fully national, majority and minority co-productions, 2007-2016



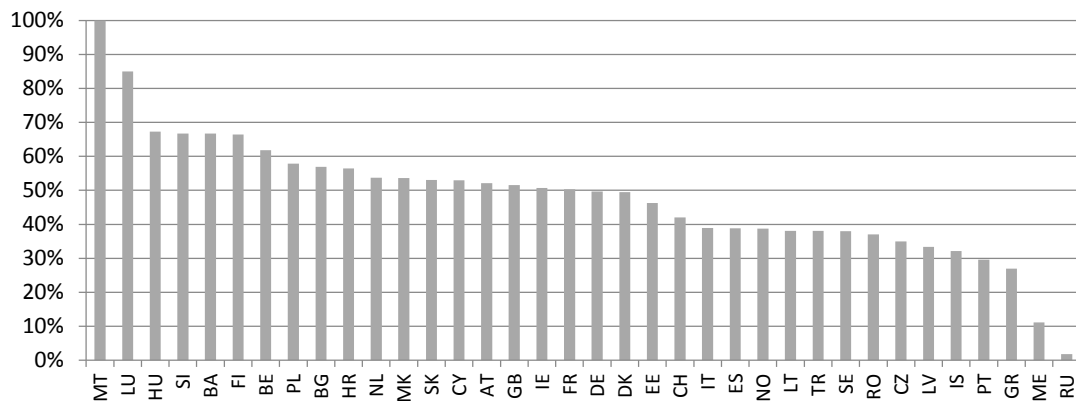
An even share of majority and minority co-productions

Most of the main producers in Europe shot a roughly even share of majority and minority co-productions over the 2007-2016 period. Moreover, the share of minority co-

productions out of the total number of co-productions in most European countries was between 35% and 55%, with just some small- and medium-sized production countries shooting significantly more minority co-productions than majority co-productions – and only four of them produced, overall (including 100% national, majority and minority co-productions), more than an average of 30 films a year; namely, Belgium, Poland, Finland and Hungary.

In addition, very few countries with a minimum relevant yearly production volume could be considered specialised in foreign projects as a minority partner (co-production accounting for more than half of overall production and minority co-production for more than half of overall co-production); only Luxembourg, Belgium, Slovakia, Ireland and Croatia could be included in this group of countries with noteworthy participation in minority co-productions in relative terms.

Figure 30. Share of minority co-productions out of the total number of co-productions, 2007-2016

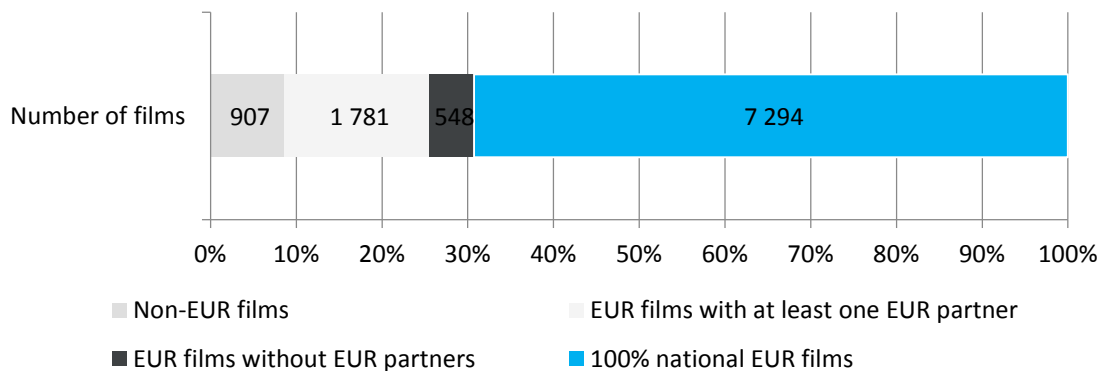


7.3. Co-production partners

Over 3 200 multi-national co-productions between 2007 and 2016

As a reminder, analysis in the following sections rested upon a set of figures drawn from the European Audiovisual Observatory’s Lumière database, and different from the set used in the previous sections. Lumière data are based on the actual number of productions released in at least one of the territories covered by the database, and the nationality of films may differ from that stated by the different national film centers. The sample comprised 10 530 films produced with European involvement between 2010 and 2015, with a theatrical release in at least one territory. A total of 9 623 were European productions, while the rest were non-European productions with European involvement as minority co-producer. Most European productions (7 294) were fully national films, while the remaining 2 329 films were majority co-productions. In addition, 907 non-European films were participated in by European partners, meaning that European production companies were involved in a total of 3 236 multi-national co-productions over the period examined.

Figure 31. Breakdown of the sample of films with European participation by type of production, 2010-2015



150 countries involved in European co-productions

Bearing in mind that several countries can participate in the same production, the number of bilateral interactions is necessarily higher than that of co-productions. Using bilateral interaction as an indicator of cooperation between two countries, we identified a total of 5 203 interactions involving the 3 236 co-productions in the sample, comprising 150 countries– 105 as majority co-producer and 142 as minority co-producer.

5 203 bilateral interactions

in

3 236 co-productions

involving

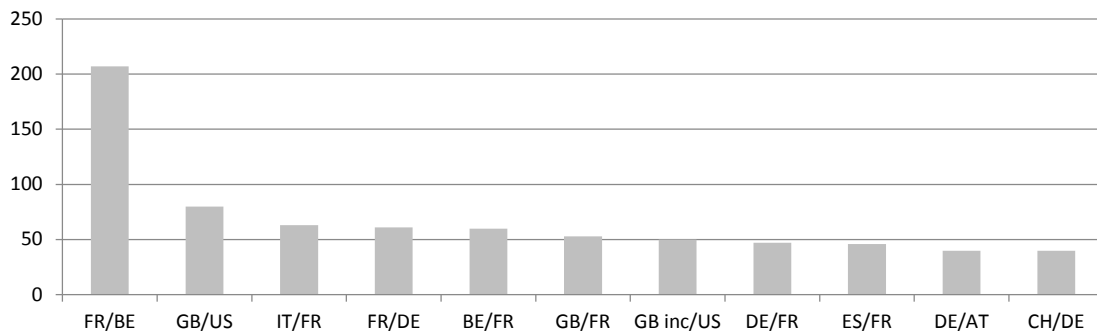
105 countries as majority
co-producer

142 countries as minority
co-producer

The number of interactions can be broken down into those in European majority co-productions and those in European minority co-productions. Thus, 3 686 interactions involved a European country as majority producer, and 2 565 of those 3 686 had a European country as minority co-producer. In turn, 3 707 interactions occurred in co-productions with at least one European country as minority co-producer (2 565 in European productions and 1 142 in non-European productions).

Although the 5 203 bi-national interactions took place in 1 066 combinations between two of the 150 countries involved, most were relatively recurrent, with French/Belgian co-productions emphatically topping the ranking of most frequent bi-national co-production tie-ups, with 207 such films between 2010 and 2015. British-American, Italian-French, French-German and Belgian-French productions completed the list of the top five more frequent bi-national co-production tie-ups with the involvement of at least one European partner over this period.

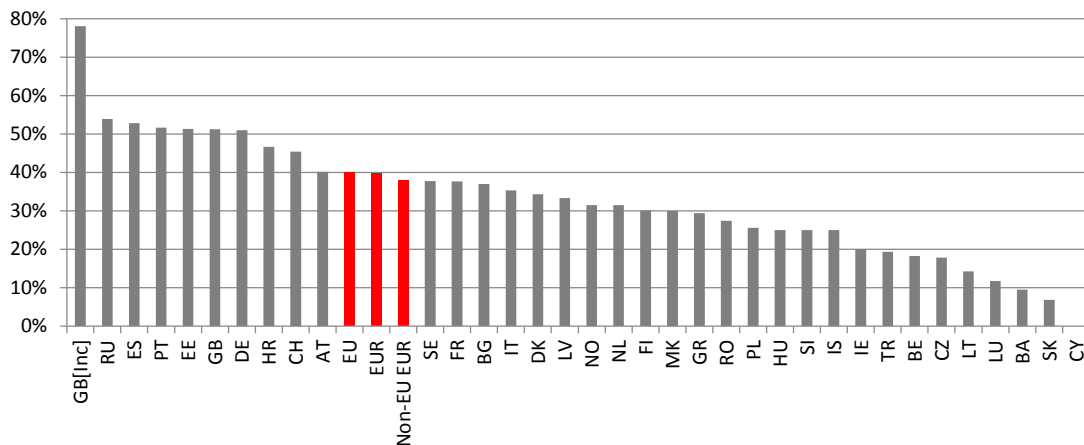
Figure 32. Most common co-productions with EUR countries a majority co-producer, 2010-2015



A significant number of interactions with non-European partners

On average, 40% of the interactions with other countries in European majority co-productions were with non-European partners. In the case of GB inc productions, a full 78% of the interactions were with non-European co-producers, notably the US – a reflection of the fact that the concept of GB inc production was designed mainly to break down British production into those films with, and those without, support from American majors. In addition, only Russian, Spanish, Portuguese, Estonian, British non-inc and German films involved more interactions with non-European partners than with European ones.

Figure 33. Share of partners outside Europe (in majority co-productions of the countries listed), 2010-2015

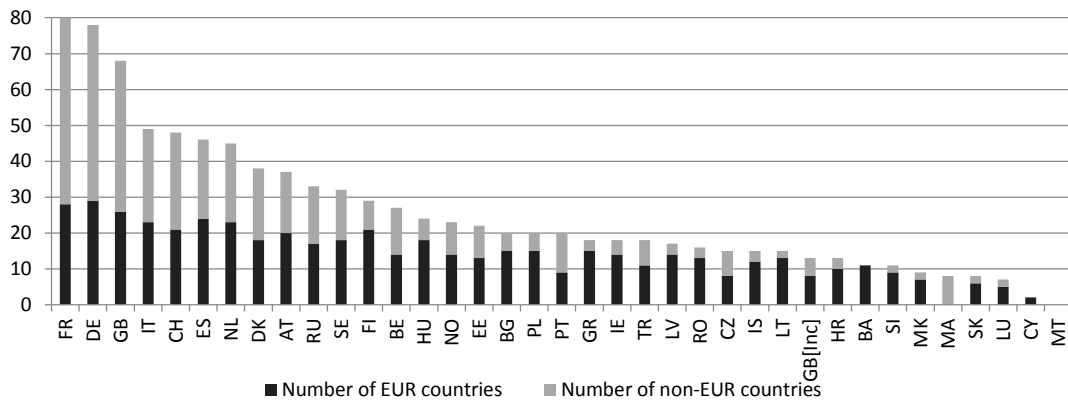


Correlation between co-production volume and number of partner countries

Only 11 European majority co-production countries interacted with more than 30 countries over the period 2010-2015, and all of them figured at the top of the list by number of co-productions in Europe, confirming that the more prolific co-production countries are also more diverse in terms of the number of countries with which they work. It is also worth noting that the number of European countries with which European countries co-produced was higher than that of non-European countries, with the exception of the top five countries by number of countries with which they co-produced, plus Denmark and Portugal. Despite a few exceptions, smaller- and medium-sized

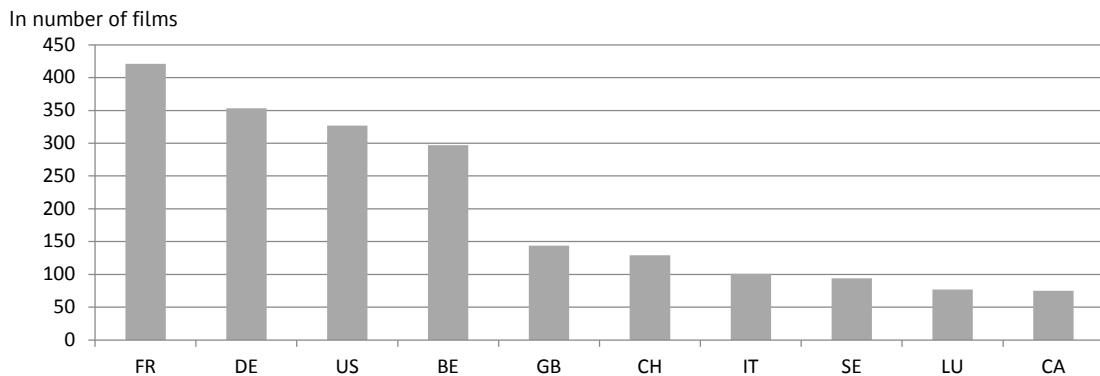
production countries co-produced with fewer countries, and mostly with European countries.

Figure 34. European countries by number of countries with which they co-produced as majority co-producers (broken down into European countries and non-European countries), 2010-2015



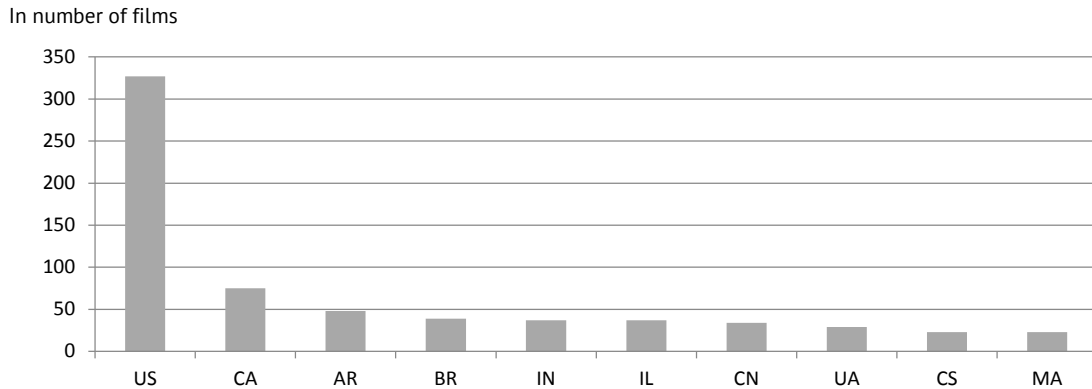
France was the most frequent minority co-production partner in European co-productions, followed by Germany, the US and Belgium. A total of 77% of European co-productions had at least one European co-production partner; 65.8% of all European co-productions involved participation by at least one of the top 10 minority co-producers below.

Figure 35. Most frequent co-producers (as minority co-producer) of European majority co-productions, 2010-2015



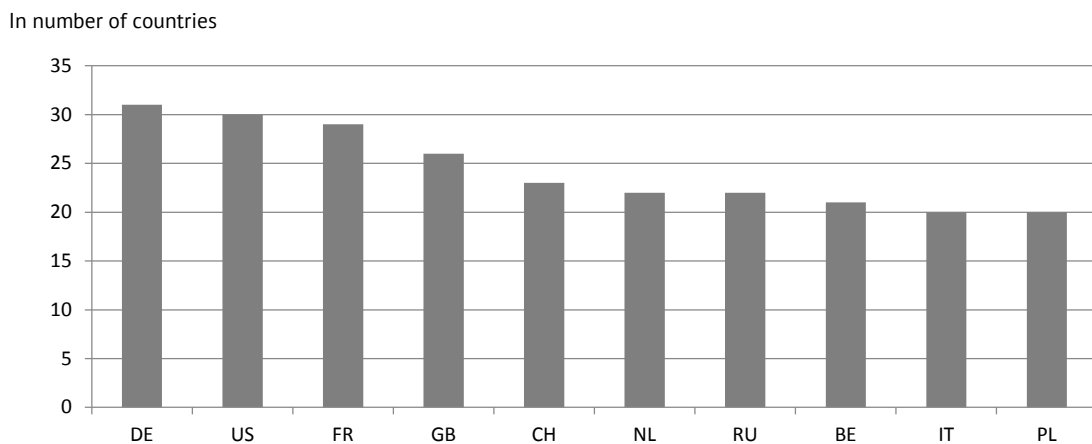
In addition, 38.3% of the European co-productions involved at least one of 115 non-European partners identified over the period 2010-2015; however, most of the interactions with non-European partners (67.5%) were with one of the top 10 countries listed below. Moreover, the list leader – the US, with participation in 327 European productions - was involved in more projects than the next eight non-European co-producers combined, –which is to say that the US was involved in around one third of the European majority co-productions with non-European partners.

Figure 36. Most frequent non-European co-producers of European majority co-productions, 2010-2015



Regarding diversity, only four countries participated in European majority co-productions with more than 25 countries; namely, Germany (31), the US (30), France (29) and the UK(26). Furthermore, only 36 of the 142 countries participating in a European production as minority co-producer were involved in projects in 10 or more countries over the period 2010-2015. A total of 86 countries were involved in co-productions in five or fewer European countries. Overall, minority co-producers in European co-productions participated in projects in an average of 6.65 countries and a median of four.

Figure 37. Top minority co-producers in European films by number of countries with which they co-produced, 2010-2015



Co-production with non-European countries more common among leading producers

It is evident from the two graphs below that the leading producers in Europe opted for high levels of co-production with non-EUR countries, both as majority and minority co-producer. Although there are other producing countries with figures similar to those of the UK, France, Germany, Spain, Italy or Russia, these are also small producing countries with no relevant production volume from which to draw conclusions about the the share of co-production involving European and non-European countries.

Figure 38. Share of co-productions (European and non-European) participated in by European minority co-production countries

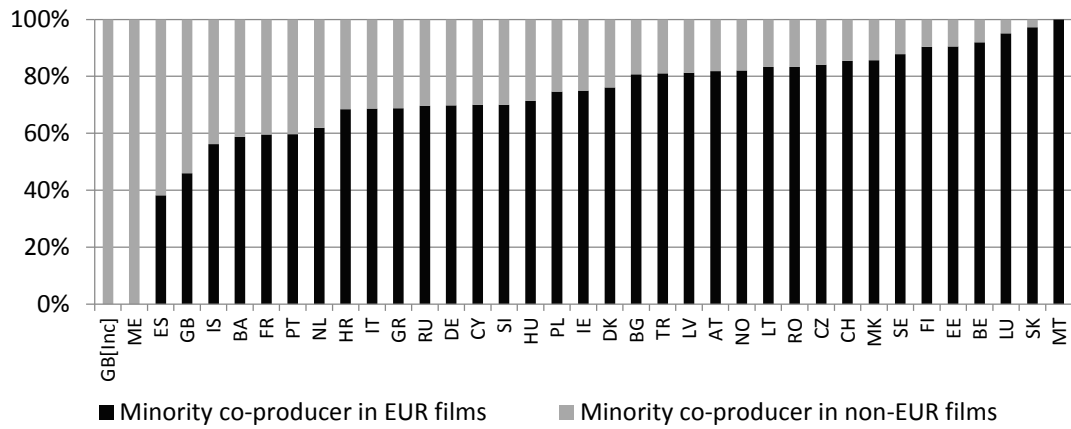
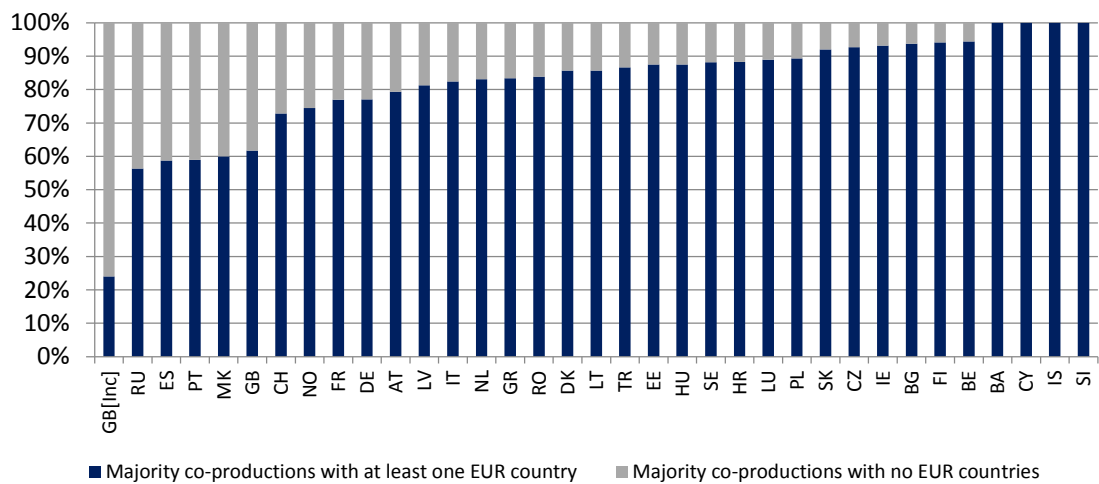


Figure 39. Share of co-productions (with and without European partners) by majority co-production country



7.4. Most frequent bilateral interactions

The concept of **interaction** refers to each instance of binational cooperation in a multilateral co-production. This can be better understood with an example. For instance, if we have a Spanish-Canadian-Romanian-Swiss co-production, it could be variously defined, depending on perspective, as follows:

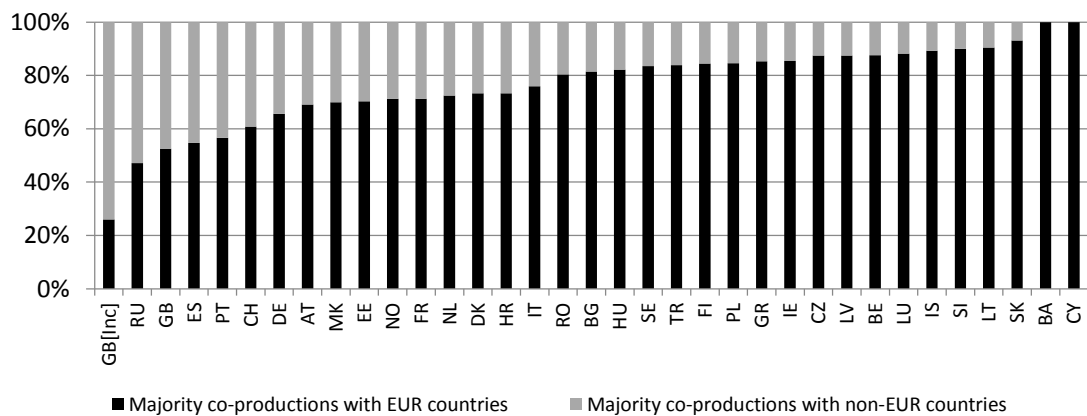
- A Spanish majority co-production
- A Canadian minority co-production
- A Romanian minority co-production
- A Swiss minority co-production
- An interaction between Spain and Canada
- An interaction between Spain and Romania

- An interaction between Spain and Switzerland
- An interaction between Canada and Romania
- An interaction between Canada and Switzerland
- An interaction between Romania and Switzerland

Therefore, we have one film, three co-producers and six bilateral interactions. In the analysis of cooperation between countries, the number of interactions is the most accurate indicator. It is important to bear in mind that interactions refer to the frequency with which a given country co-produces with another; thus, the number of overall interactions of a given country will be higher than the number of majority and minority co-productions of that country, since several interactions can take place within the same production (as in the example above).

Most European countries interacted mostly with other European countries, with only UK and Russia having more interactions with non-EUR countries.

Figure 40. Share of interactions (with and without European partners) by majority co-production country



The most frequent interaction at the European level between 2010 and 2015 was between France as majority co-producer and Belgium as minority co-producer (207), followed by US-British (112), British-American (80), US-French (76), Italian-French (63) and French-German (61).

Table 1. Interactions between countries that most frequently co-produce, 2010-2015

In number of interactions

		MAIN PRODUCER														
		GB(inc)	US	FR	GB	CA	ES	DE	IT	BE	AR	SE	DK	NL	CH	AT
MINORITY PRODUCER	GB(inc)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	US	50	-	34	80	10	19	27	13	3	4	4	7	7	12	10
	FR	5	76	-	53	24	46	47	63	60	22	9	9	6	21	6
	GB	-	112	19	-	12	9	13	10	2	1	8	12	7	3	5
	CA	1	27	25	10	-	3	11	3	3	1	2	1	-	3	-
	ES	-	27	19	12	4	-	7	10	1	36	-	2	2	1	2
	DE	3	45	61	28	5	12	-	11	13	9	14	16	11	40	25
	IT	-	25	32	13	4	6	17	-	7	5	-	4	3	2	2
	BE	2	12	207	10	2	1	12	4	-	-	-	-	33	6	1
	AR	-	4	6	3	-	20	7	5	-	-	2	-	1	2	1
	SE	3	8	6	3	-	2	6	3	-	-	-	25	5	1	-
	DK	-	9	1	7	3	-	1	-	-	2	21	-	2	-	-
	NL	-	11	5	5	2	2	9	2	18	8	1	2	-	2	1
	CH	2	8	37	5	2	3	33	17	6	1	1	-	1	-	6
AT	-	7	8	3	-	1	40	-	2	3	1	2	1	4	-	

The interactions – as majority or minority co-producer - of each of the top 10 European co-producing countries were analysed below. In seven of them, the US ranked among the top three co-producing partners. In six, France appeared in the top three. The top co-production partners of each country enjoyed this status primarily because of two variables: language and proximity. At least one of the official languages in five of the 10 countries analysed was also an official language in the country of the main co-production partner. In addition, the main partner in all 10 countries, with the exception of the UK (whose main co-production partner was the US), was a neighbouring country. Spain aside, the vast majority of the main partners of Europe's top co-producing countries were other European countries.

Figure 41. French interactions, by main partner, broken down into maj. and min.co-productions, 2010-2015

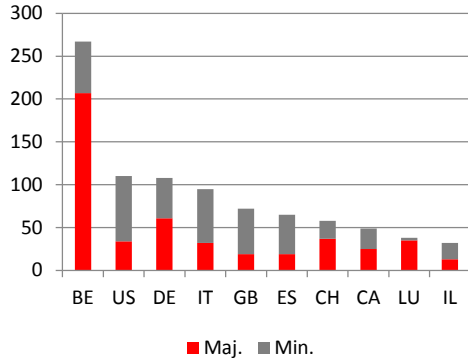


Figure 42. Share of French interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

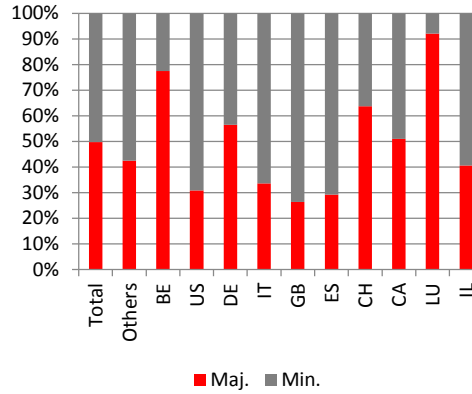


Figure 43. British interactions, by main partner, broken down into maj. and min.co-productions, 2010-2015

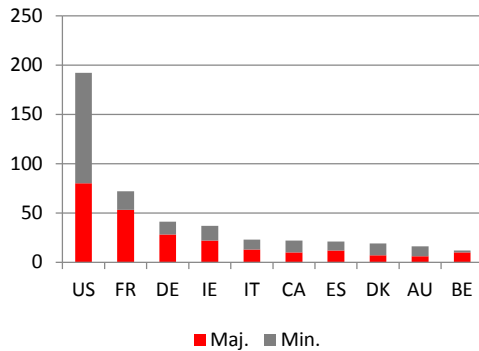


Figure 44. Share of British interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

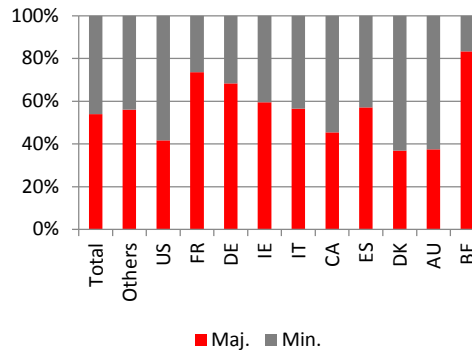


Figure 45. Spanish interactions, by main partner, broken down into maj. and min.co-productions, 2010-2015

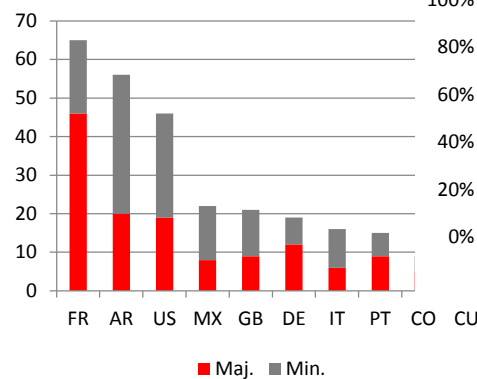


Figure 46. Share of Spanish interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

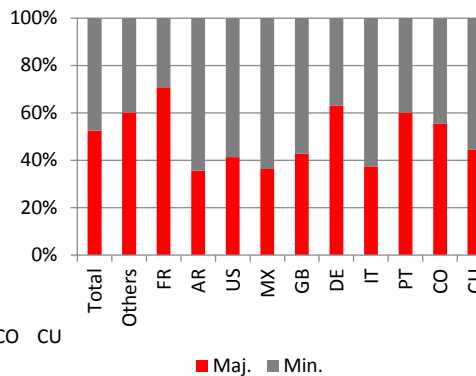


Figure 47. German interactions, by main partner, broken down into maj. and min. co-productions, 2010-2015

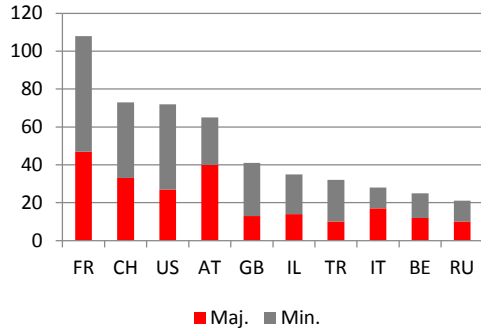


Figure 48. Share of German interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

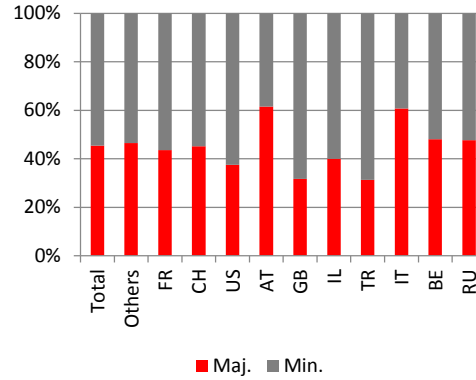


Figure 49. Italian interactions, by main partner, broken down into maj. and min. co-productions, 2010-2015

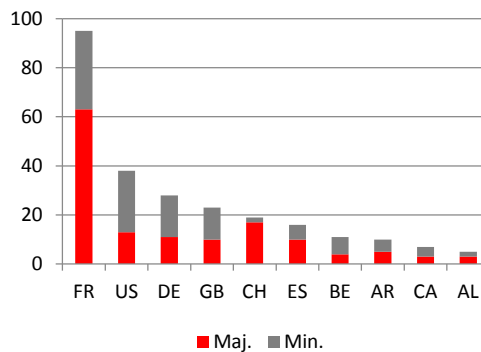


Figure 50. Share of Italian interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

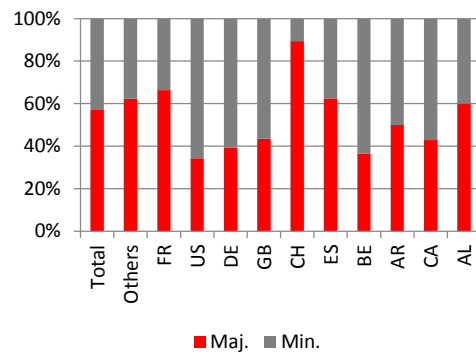


Figure 51. Belgian interactions by main partner, broken down into maj. and min.co-productions, 2010-2015

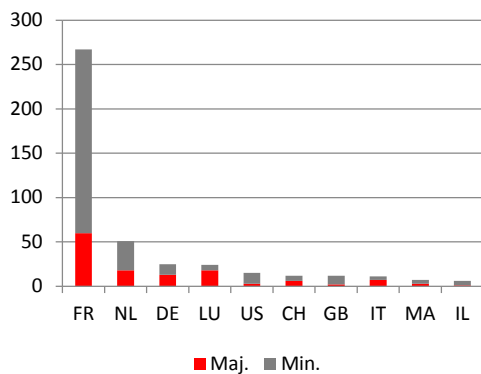


Figure 52. Share of Belgian interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

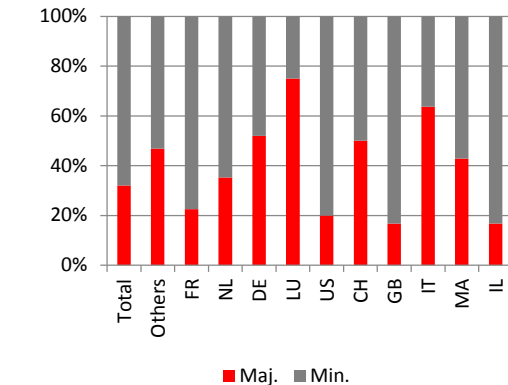


Figure 53. Swedish interactions, by main partner, broken down into maj. and min.co-productions, 2010-2015

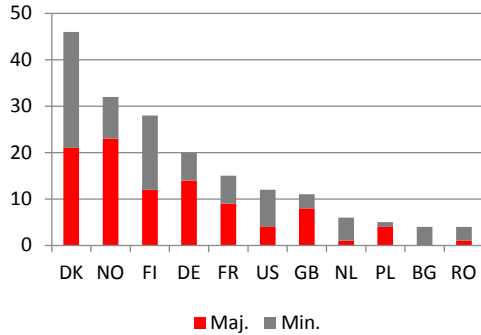


Figure 54. Share of Swedish interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

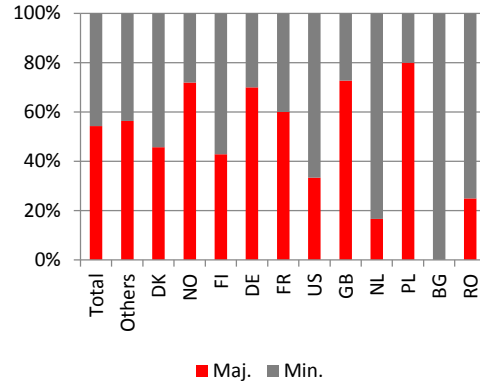


Figure 55. Danish interactions, by main partner, broken down into maj. and min.co-productions, 2010-2015

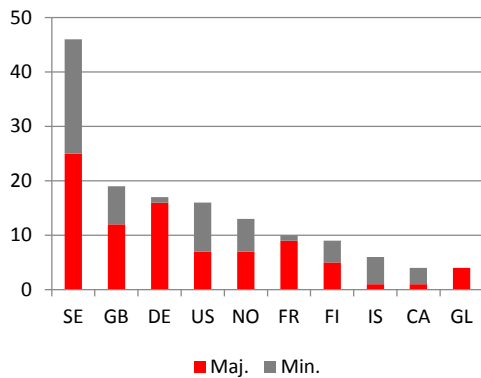


Figure 56. Share of Danish interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

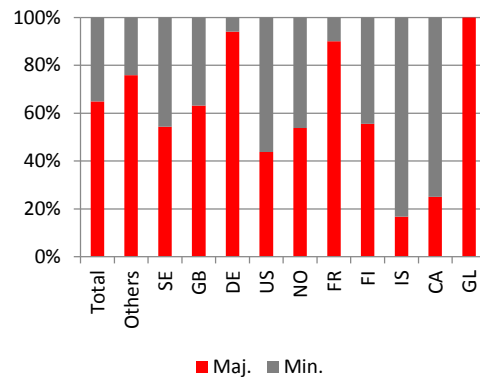


Figure 57. Dutch interactions, by main partner, broken down into maj. and min.co-productions, 2010-2015

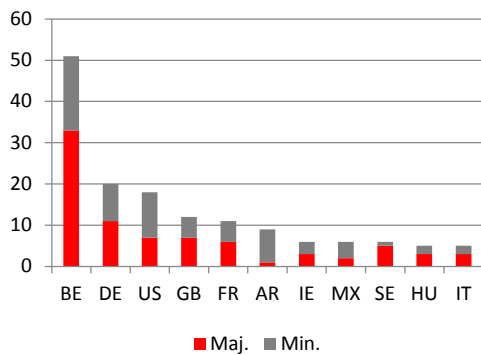


Figure 58. Share of Dutch interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015

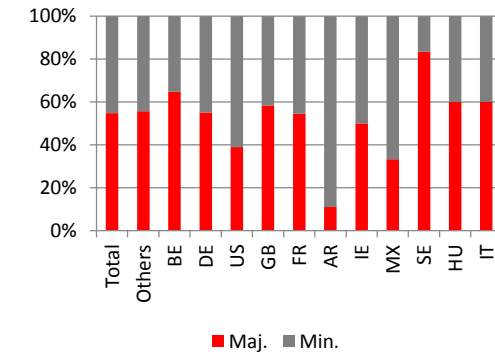


Figure 59. Swiss interactions, by main partner, broken down into maj. and min.co-productions, 2010-2015

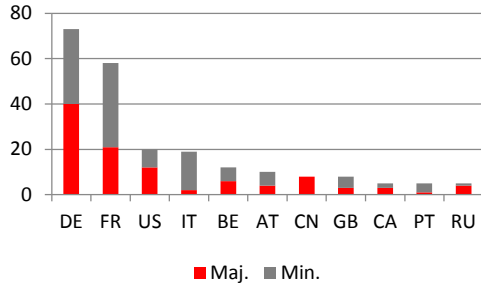
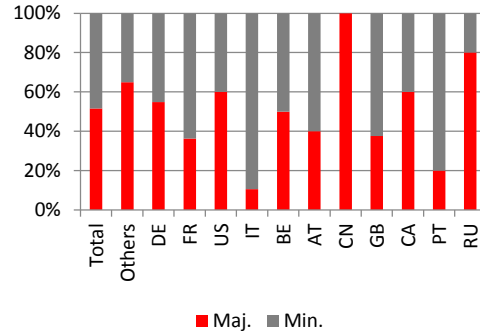
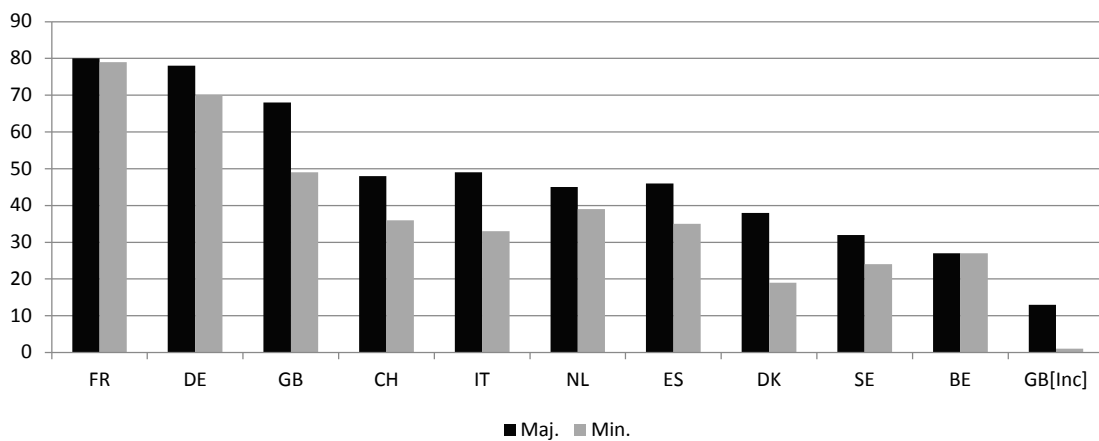


Figure 60. Share of Swiss interactions, by main partner and overall, broken down into maj. and min. co-productions, 2010-2015



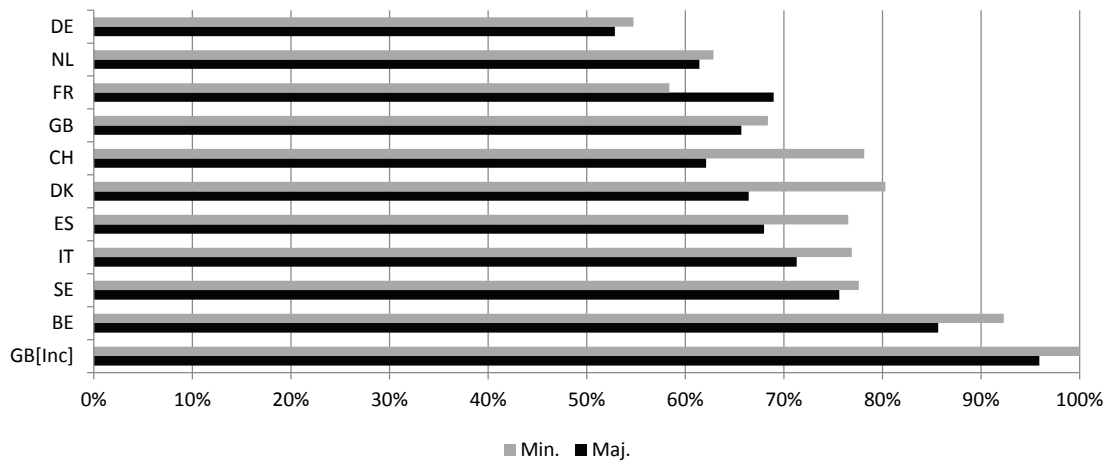
Other indicators define quantitatively and qualitatively the interactions of a country. One is diversity, expressed in terms of how many countries a given country co-produces with and whether or not there is a relevant difference in the pattern displayed by majority and minority co-productions. As can be seen in the figure below, all countries tracked interacted with more countries on majority co-productions than minority co-productions, with only France and Belgium showing almost equal levels for both categories. In countries such as Denmark, Italy and the UK, the difference was quite remarkable. It is also worth noting that only seven of the 36 European countries covered interacted with more than 50 countries –and only three (France, Germany and the UK) of the seven interacted with more than 60 countries.

Figure 61. Number of countries involved in co-productions with the top 10 European co-producing countries as majority or minority co-production partner, 2010-2015



Concentration at the top was defined by the share of interactions with the top 10 co-production partners of a given country. In most cases, as evident in the figure below, concentration at the top was higher for minority co-productions.

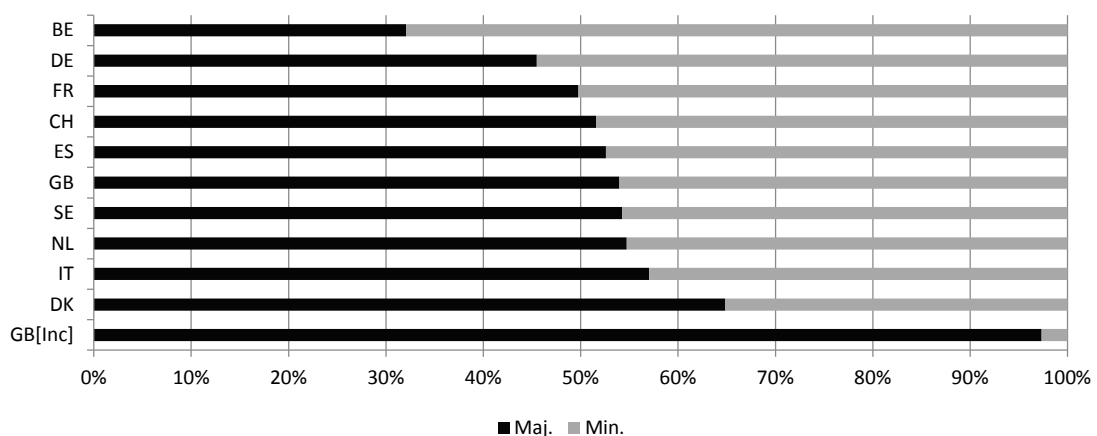
Figure 62. Share of interactions with the top 10 co-production partners of each of the top co-producing countries in Europe, 2010-2015



If we combine the results of the last two figures, we may conclude that the main co-producers in Europe tended to co-produce with fewer countries on minority co-productions and, in addition, most of the interactions at this level were more concentrated among the main partners of each country than at the majority co-production level.

Lastly, if we compare the interactions of the main co-producers in Europe with other countries on majority co-productions and minority co-productions, most countries fell within a bracket of 45% to 55%, for interactions in majority co-productions, with Belgium's 68% figure for interactions in minority co-productions an exception, and underscoring the country's specialisation in minority co-production (due to its size, shooting infrastructure, languages and, most importantly, subsidies and fiscal incentives).

Figure 63. Share of interactions in majority and minority co-productions of each of the top co-producing countries in Europe, 2010-2015

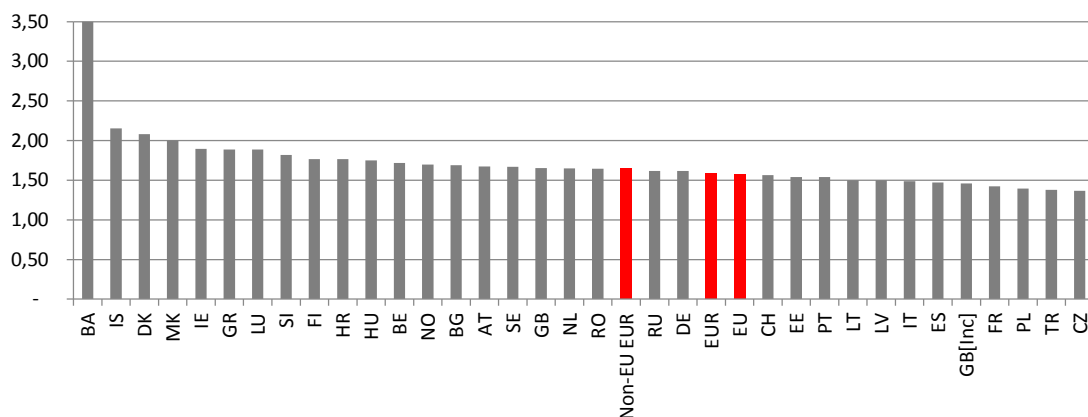


7.5. Number of co-producers

An average of 1.58 foreign co-production partners in European co-productions

The average number of co-production partners in European countries was 1.58 partners per co-production (that is, the main production country plus 1.58 foreign co-production partners), with bi-lateral co-production as the most frequent form. A total of 27 countries were within a bracket of 1.45 to two co-production partners, on average, per co-production and only four countries offered an average above two.

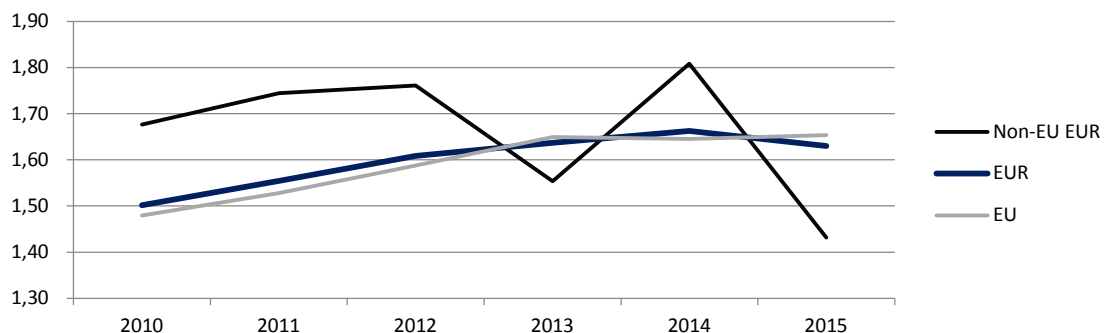
Figure 64. Average number of co-production partners by main country of production, 2010-2015



Increase in number of co-producing countries per co-production

The average number of co-production partners increased over the period covered; in the case of the EU, up from an average 1.48 co-production partners in 2010, to 1.64 partners in 2015. In contrast, non-EU European countries revealed a less constant pattern, with ups and downs; although the overall average number of co-production partners in non-EU European countries was usually higher than in EU countries (an average high of 1.81 in 2014), the number dropped to 1.43 in 2015 (below EU levels), primarily due to a sharp decrease in Russia, Turkey and Switzerland.

Figure 65. Evolution of the average number of co-production countries, 2010-2015

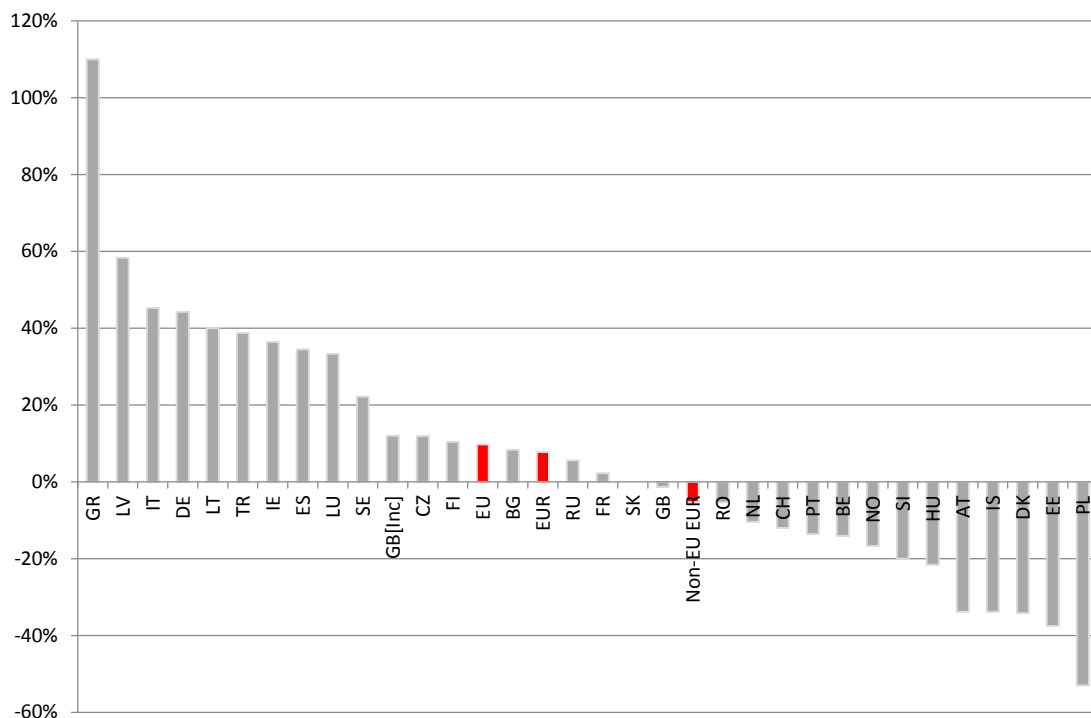


The average number of co-production partners grew by 8% in Europe between 2010-2011 and 2014-2015, a period during which most countries experienced growth, especially Greece (110%) and Latvia (58%). The most notable exceptions were Estonia (-38%) and

Poland (-53%). A clear trend relating to the increase or decrease in the number of co-production partners over this period could not be inferred; in the case of countries with a low production volume, changes may have been due to a few co-productions with an unusual number of co-producers.

Those countries (Greece, Italy, Ireland, Spain) most heavily affected by the financial crisis saw an increase in the number of co-production partners, suggesting that scarcity of sources of financing prompted local producers to look for partners abroad. However, the increase in other countries (such as Germany, Turkey, Sweden or Luxembourg) can be explained by changes in film policy and public funding. In addition, most Eastern European EU countries experienced a decrease (Poland, Estonia, Hungary, Romania and Slovakia) or only a very mild increase (Bulgaria and the Czech Republic), with the exception of two Baltic countries (Lithuania and Latvia), in which growth was registered at more than 40%.

Figure 66. Growth of the number of co-production partners by country over the period 2010-2015, comparing 2010-2011 and 2014-2015



8. (Co)-production: Admissions and circulation

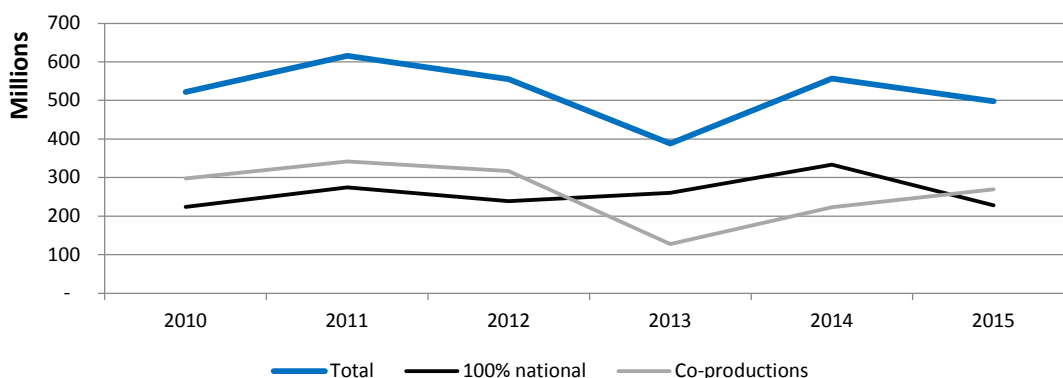
8.1. Admissions

It should come as no surprise that co-productions generate, by and large, a higher number of admissions than purely national films. On the one hand, a co-production benefits from local producers in more than one country, making domestic distribution potentially easier and more successful, especially when elements related to the story, shooting language, shooting location or cast and crew may appeal to domestic audiences of all countries involved in the project. On the other hand, multinational co-productions are often high-budget productions involving financial contributions not easily raised in only one of the production countries. Since most co-productions reflect the fact that the project has greater prospects of reaching a more global or multi-regional audience, the fact that co-productions circulate better and gross more appears to be a self-fulfilling prophecy and not necessarily a recipe for success.

More than half of worldwide admissions to European films generated by co-productions

The difference between average admissions for purely national films and majority co-productions speaks to the production patterns in each country. Despite constituting only a portion of the total production volume in Europe (circa 25% over the period 2010-2015), overall admissions to co-productions were higher than those for purely national films, amounting to a yearly average of 262.9 million admissions over the period 2010-2015, or 50.3% of overall admissions to European films (56.9% for EU films).

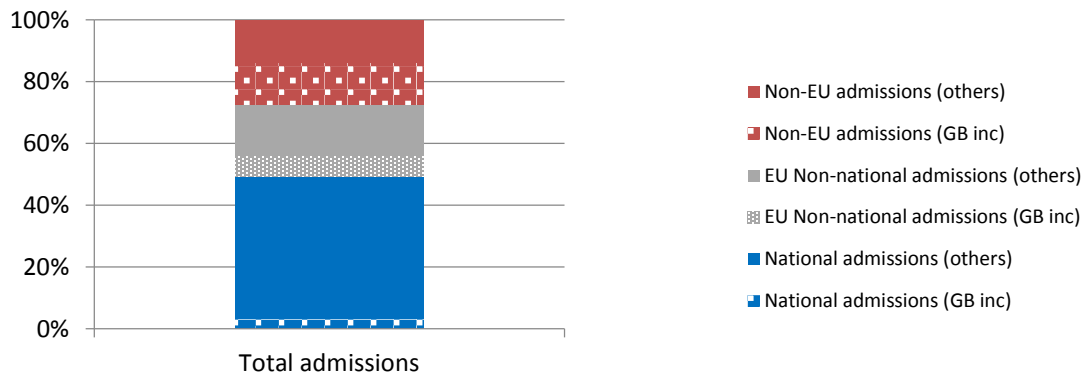
Figure 67. Worldwide admissions to EUR films by type of production, 2010-2015



Purely national films accounted for a yearly average of 259.9 million admissions over the same period, despite a sharp decline in admissions for European co-productions in 2013, which reversed the previous trend, until 2015.

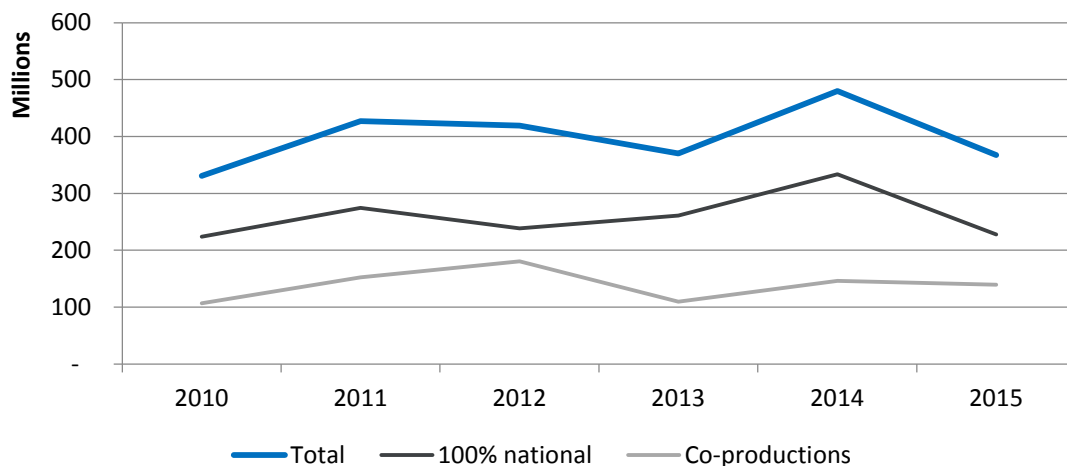
British productions with support from American majors represented an important outlier, especially – as illustrated by the graph below - for non-European admissions.

Figure 68. Share of admissions broken down by country of production (GB inc vs others) and release territory, 2010-2015



Pan-European figures excluding those for GB inc productions therefore provide a more accurate perspective. Although the overall aggregate trend is the same with and without said productions, the adjusted aggregate (excluding GB inc films) shows that purely national films generated more admissions than co-productions, which accounted for a yearly average of 34.9% of overall admissions to European films between 2010 and 2015.

Figure 69. Worldwide admissions to EUR films by type of production (excluding GB inc productions), 2010-2015

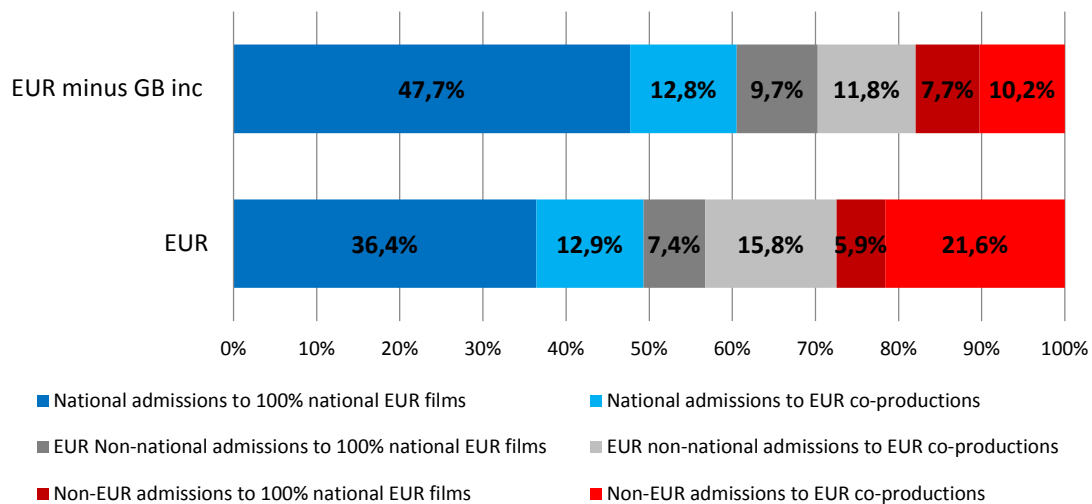


Admissions can be broken down into two categories; namely, the type of production (purely national vs. co-production), and the market in which the admissions were generated (domestic market, non-national European market and non-European market). The combination of these categories produces the profile of attendance for the domestic productions of each country. In overall terms, almost half of admissions for European films were in domestic markets (49.3%); the figure is much higher when GB inc productions are excluded (60.5%). On the non-national admissions front, non-European

admissions (27.5%) had greater weight in overall attendance than non-national European admissions (23.2%). However, when GB inc productions were excluded, the proportions were reversed, with 21.5% of admissions recorded in non-national European countries and 17.9% in non-European countries.

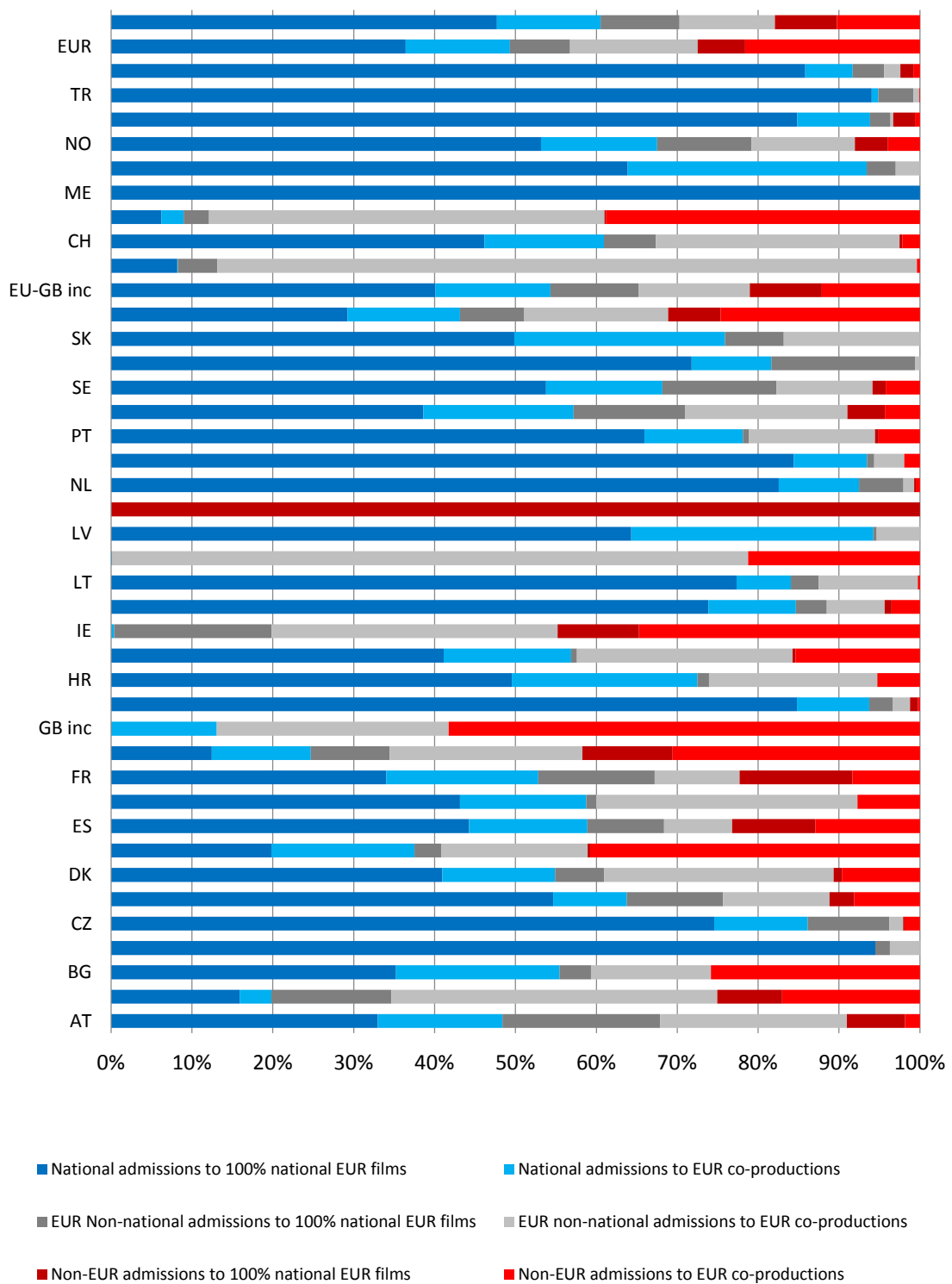
Regarding production type, as already indicated more than half of worldwide admissions to European films were generated by co-productions (50.3%; 34.9% when GB inc productions are excluded). Moreover, there is a certain balance (when GB inc productions are excluded) in the breakdown of attendance among the three territories analysed: domestic market (12.8%), non-national European markets (11.8%) and non-European markets (10.2%). Both with and without GB inc productions, European co-productions, as opposed to purely national films, account for more admissions in non-national markets than in domestic ones.

Figure 70. Overall share of admissions by type of production and territory of release, 2010-2015



Nevertheless, the situation varies significantly from country to country. Among the big and medium-sized production countries, Turkey, Russia, Greece, Poland and the Netherlands recorded more than 80% of admissions from purely national films in their domestic markets. In addition, a group of countries accounted for above-average success rates for purely national films in foreign territories. Large and medium market countries among them include: Ireland; France; Austria; Belgium; the UK; and Spain, all of which have a widespread language, which bolsters film exports. The same logic applies to co-productions, although in this case, some additional countries, such as Luxembourg, Hungary, Bulgaria Finland and Denmark, also made it to the top of the list because of their prolific roles as co-producers, or due to the circulation and success of their films in neighbouring countries

Figure 71. Share of admissions by type of production and territory of release, by country of production, 2010-2015



Co-productions generate 3 times more admissions than purely national films

As already indicated, co-productions accounted for 24.2% of the overall production volume in Europe over the period 2010-2015 (23.8% when GB inc productions are excluded); however, they generated 1.576 million admissions – that is, 50.3% of overall attendance for European films during those years (34.9% when GB inc films are excluded).

European co-productions 2010-2015

account for

24.2% of
production volume

and

50.3% of
admissions

with a

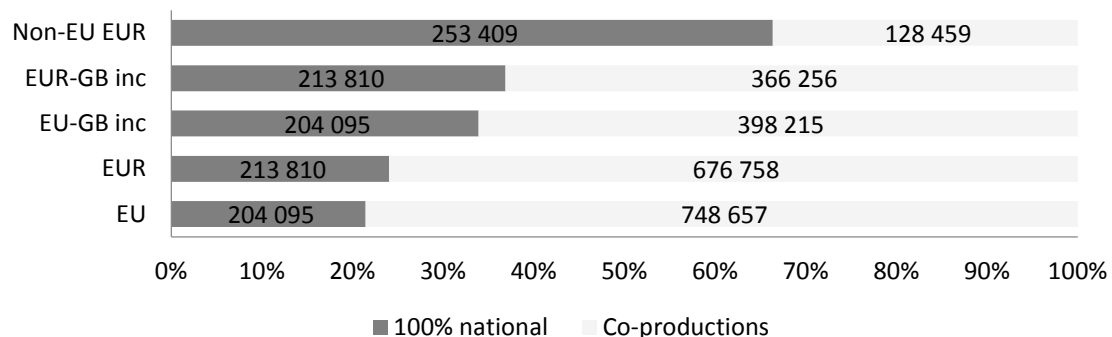
yearly average of 676,758 admissions

meaning that

they generate 3 times more admissions than purely national films

The 676,758 average admissions figure for European co-productions is more than three times higher (317%) than that for purely national films, with 213,810 admissions on average over the period 2010-2015; in other words, European co-productions generate three admissions for each ticket sold for a purely European national film (a ratio of 3:1). The gap closes significantly when GB inc productions are excluded: average admissions to co-productions then represent 171% of average admissions to purely national films. Thus, once outlying GB inc productions are excluded, the ratio of admissions for co-productions vs. purely national films goes down to 5:3.

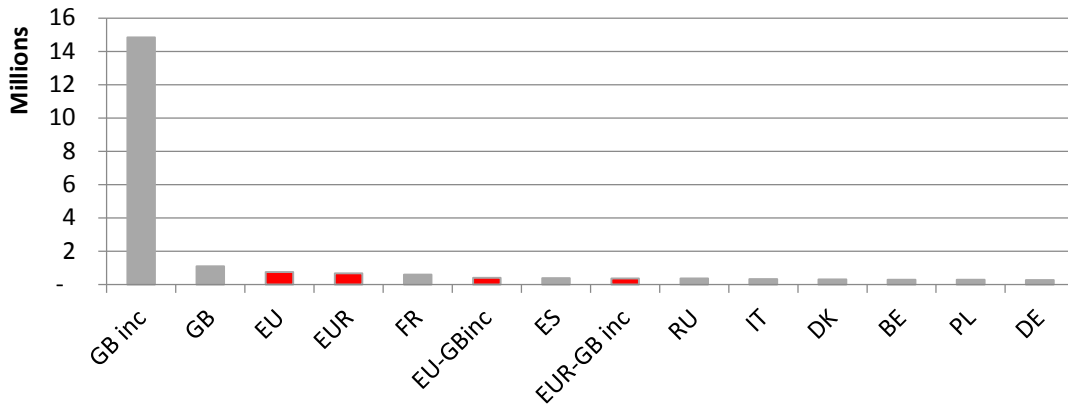
Figure 72. Average admissions to purely national films and co-productions in selected territories, 2010-2015



As can be seen in the graph above, average admissions per film are higher for purely national films only in non-EU European countries, mainly due to Turkey and marginally to

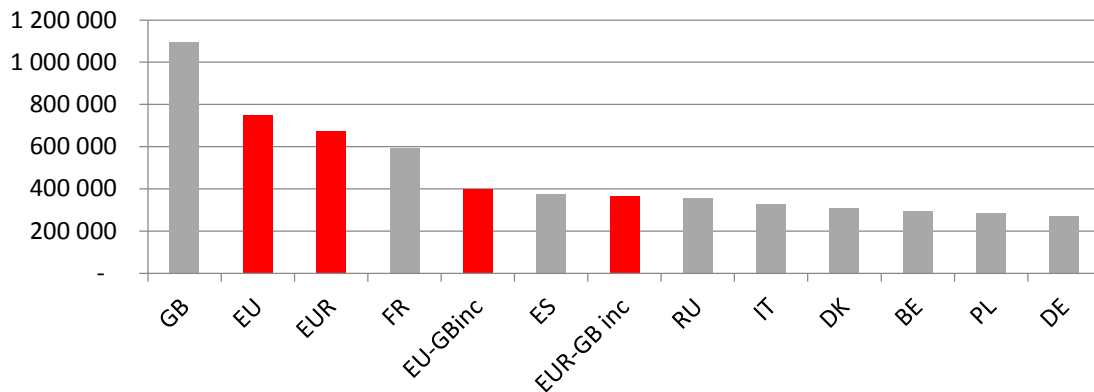
Russia. Among relevant production countries in terms of volume in Europe, average admissions to GB inc and GB films were the only ones recorded at above-Europe levels.

Figure 73. Average admissions to co-productions in top countries, the EU and Europe, 2010-2015



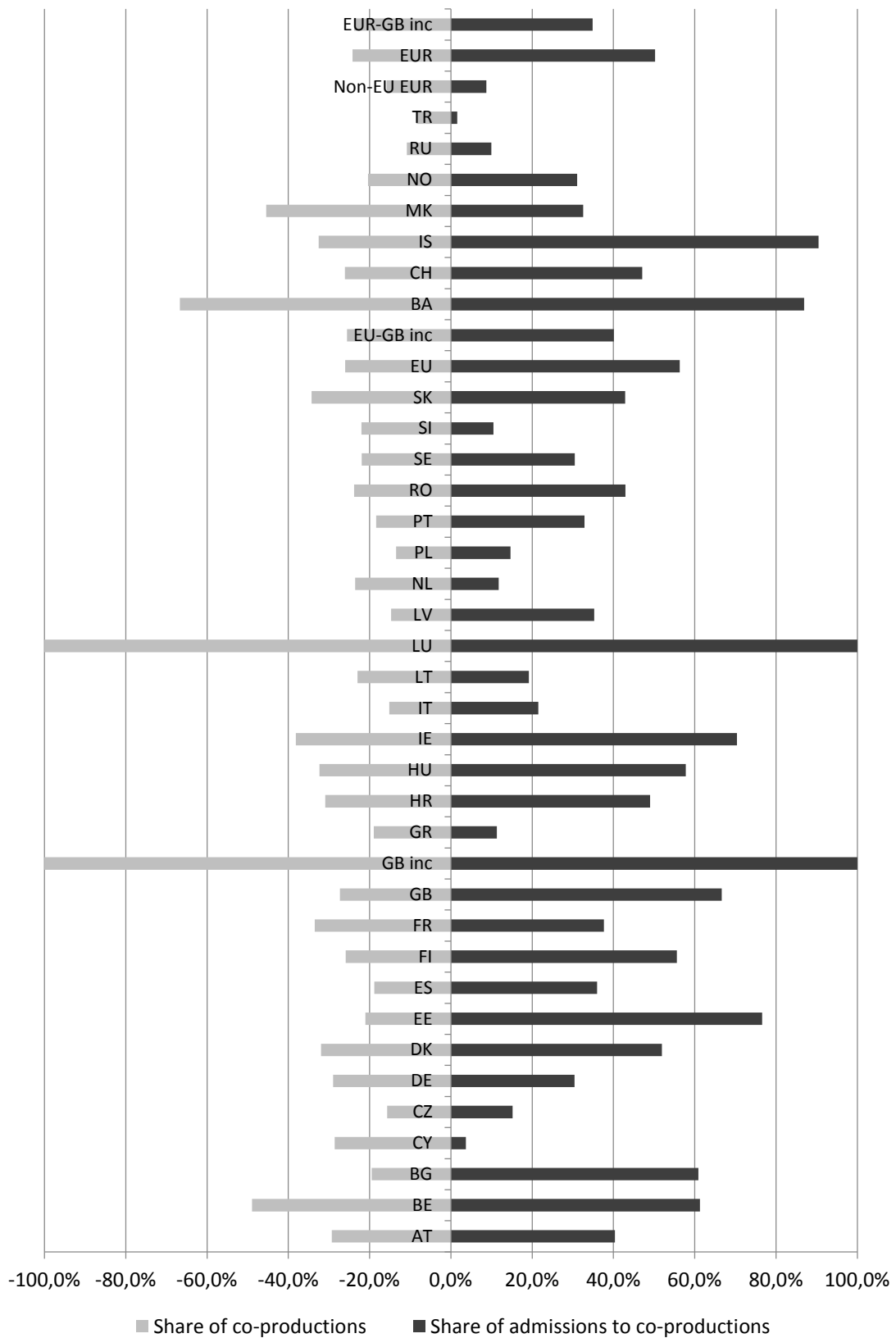
As can be better appreciated with the exclusion of outlying GB inc productions, most of the countries with the highest average number of admissions to co-productions are also among the top producing countries in Europe.

Figure 74. Average admissions to co-productions in top countries, the EU and Europe, excluding GB inc productions, 2010-2015



Nevertheless, there are also some relevant differences from country to country, both in terms of the share of co-productions out of the total production volume and the relative weight of such films at the box office. However, in only very few production countries is the share of co-production higher than the share of admissions to co-productions - Greece, the Netherlands and Turkey, among the big and medium-sized producers.

Figure 75. Average share of co-productions vs average share of admissions to co-productions, by country and overall, 2010-2015

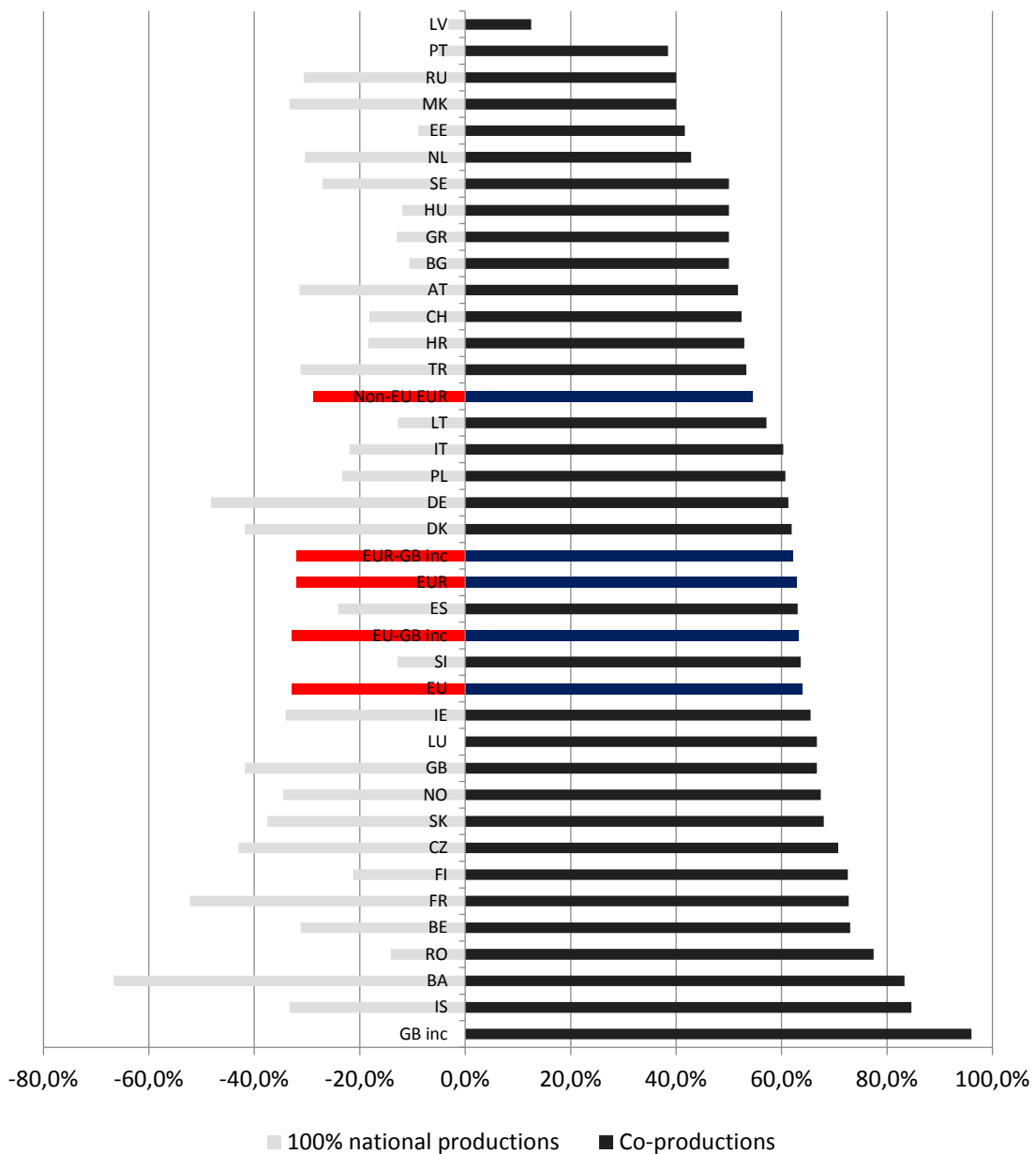


8.2. Circulation

European co-productions circulate almost twice as much as purely national productions

A total of 39.5% of the films produced in Europe between 2010 and 2015 received a theatrical release in a country other than the main production country. For majority co-productions, this figure rises to 62.9%, or 1 464 films over the period analysed. On average, European co-productions circulate almost twice as much as purely national productions (32.1%).

Figure 76. Share of circulation for purely national films and co-productions, by country, 2010-2015

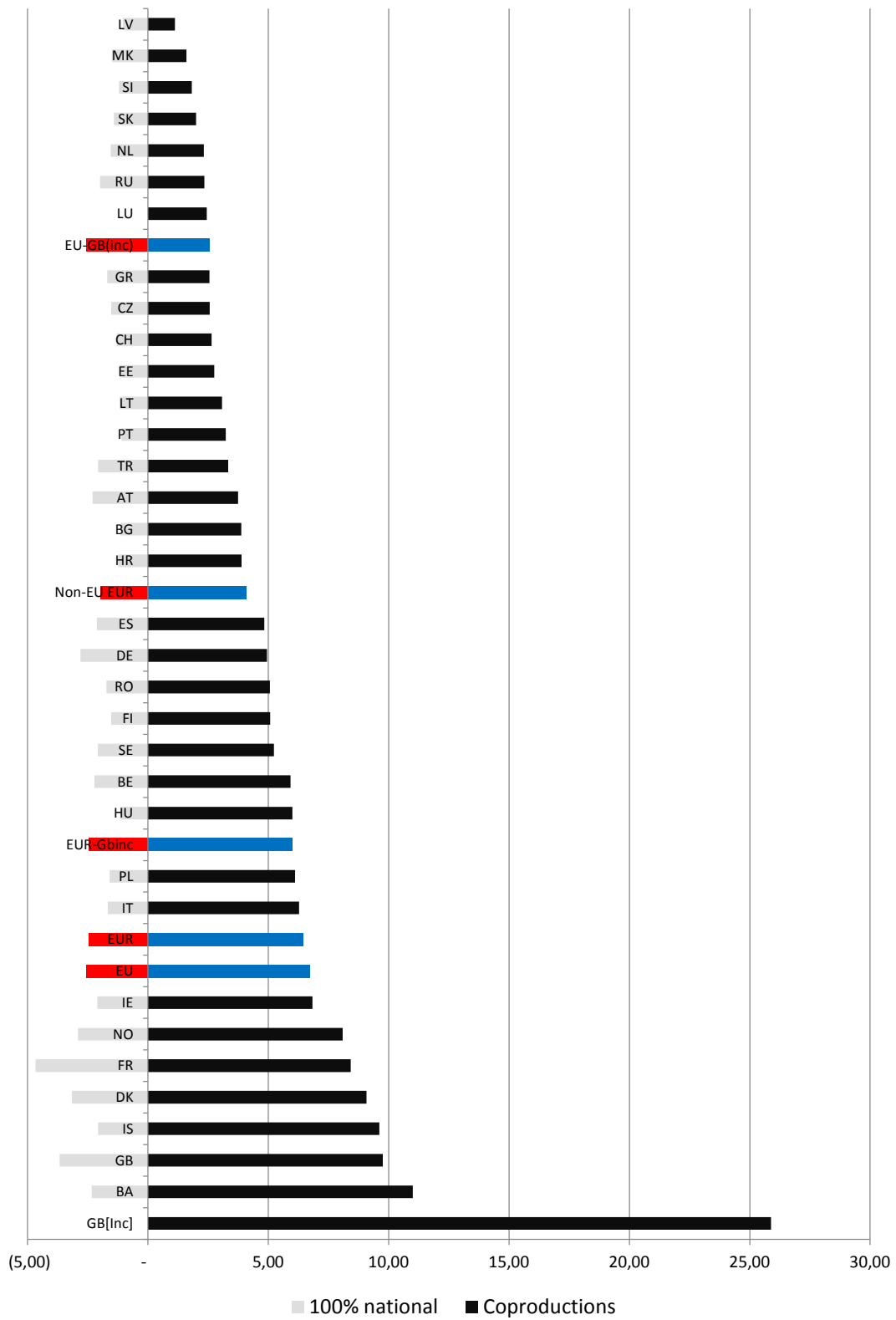


Unsurprisingly, GB inc majority co-productions circulate better (96% received a release outside the UK). Romania (77.4%), Belgium (73%), France (72.7%) and Finland (72.5%) are the next big and medium-sized producers on the list. Non-EU European co-productions had much lower circulation levels, with just 54.4% of films produced in those territories receiving a theatrical release abroad (this was mainly due to the low levels in Russia (40%). However, most non-European former-USSR markets are not included in the analysis). Moreover, all countries analysed had higher circulation for their co-productions than for their purely national films.

In view of the figures presented in the previous paragraph on non-national admissions to co-productions, one might expect purely domestic films to have a very low number of admissions in foreign markets. Although it is true that co-productions account for more admissions than purely domestic films, when we look at the figures for films with more than 20,000 admissions in foreign markets, we see that 76% of purely national films were above that threshold, compared to only 69% of co-productions. While the share of purely domestic films that are successful abroad is significantly lower than that of co-productions, and overall they gross less abroad and are released in fewer countries, this does not mean that they generate only a marginal number of admissions. By and large, once a purely domestic film is released in a foreign market, a minimum performance is to be expected.

Another relevant indicator is that of the average number of foreign territories in which a film is released. GB inc productions aside (they are conceived to travel around the globe), British, Danish, French and Irish co-productions travelled the most over the period 2010-2015, coming in above the EU average for foreign release countries (6.74). The overall European average was 6.43 territories (six, when GB inc productions are excluded). There appears to be a divide between EU countries and non-EU European ones with regard to the circulation of co-productions, with Russia (2.35), Switzerland (2.64) and Turkey (3.33) well below the European average. Nevertheless, in all cases, the average number of foreign release territories is higher for co-productions than for purely national films.

Figure 77. Average number of foreign release countries for purely national films and co-productions, by country of production, 2010-2015



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