

INFORMATION SHEET No. 1

Analysis of the *UIS International Survey on Feature Film Statistics*

With the support of the Government of Québec and in collaboration with the Institut de la statistique du Québec (ISQ), the UNESCO Institute for Statistics (UIS) launched a new international survey in 2007 to collect data on feature films. The analysis was based on a preliminary study by Ivan Bernier, Associate Professor, Université Laval and Serge Bernier, Associate Professor, Université du Québec à Trois-Rivières.

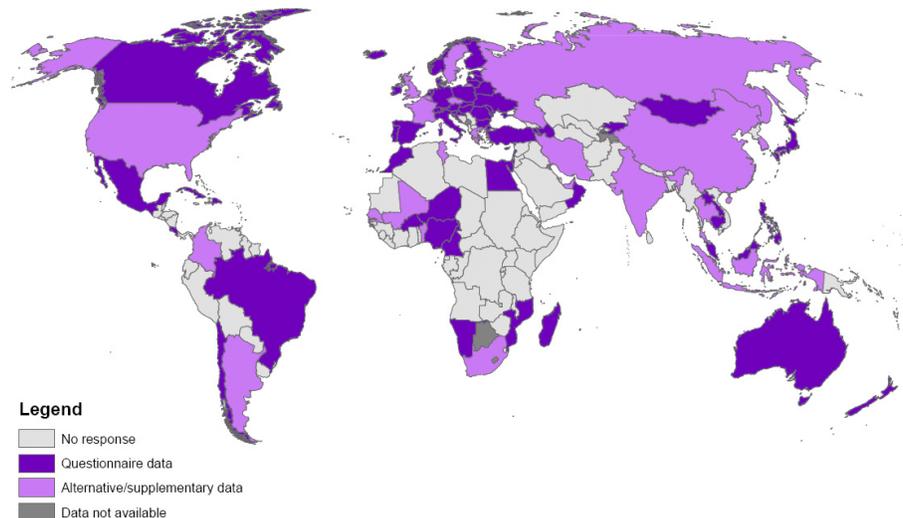
Introduction

The UIS International Survey on Feature Film Statistics is based on a new approach to gather internationally comparable and better quality data in the field of culture statistics. Cinema data elicit much interest because the film industry is experiencing massive transition and growth in certain developing countries. These data can also be relevant to the study of the diversity of cultural expressions.

Data was obtained from 101 countries for the years 2005-2006, indicating a coverage rate of 49%. This is a relatively reasonable coverage rate for an international survey. In the majority of cases, the data were obtained directly from countries in response to the questionnaire; 75 countries responded, for a response rate of 36%. Among those who responded, 11 – mainly developing countries – indicated they had no data on film production. Data on 26 other countries were obtained from alternative sources (government information available on the Internet, international compilations, etc.).

Figure 1 shows the geographical imbalance in coverage rates – a strong concentration in Europe and North America with a coverage rate of 88% and very little coverage in Sub-Saharan Africa, Latin America and the Caribbean, and the Pacific with 33%, 27% and 24% respectively. The second highest coverage rate was found in Asia with 54%, followed by Arab States with 45%.

Figure 1. Coverage rates of the *UIS Survey on Feature Film Statistics*



Source: UNESCO Institute for Statistics, April 2009.

These coverage rates hide an even greater imbalance between developed and developing countries. Indeed, the analysis in Statistical Table 1 on production, distribution and infrastructure (presented in the **Appendix**) reveals that data collected on developing countries are much less complete than those on developed countries. The underlying reason for this imbalance is either the countries simply do not have data on cinema or they are not in a position to provide any for one reason or another. The rest of the analysis will, therefore, cover the results that were obtained but cannot be considered a comprehensive examination of worldwide trends in feature film production and distribution.

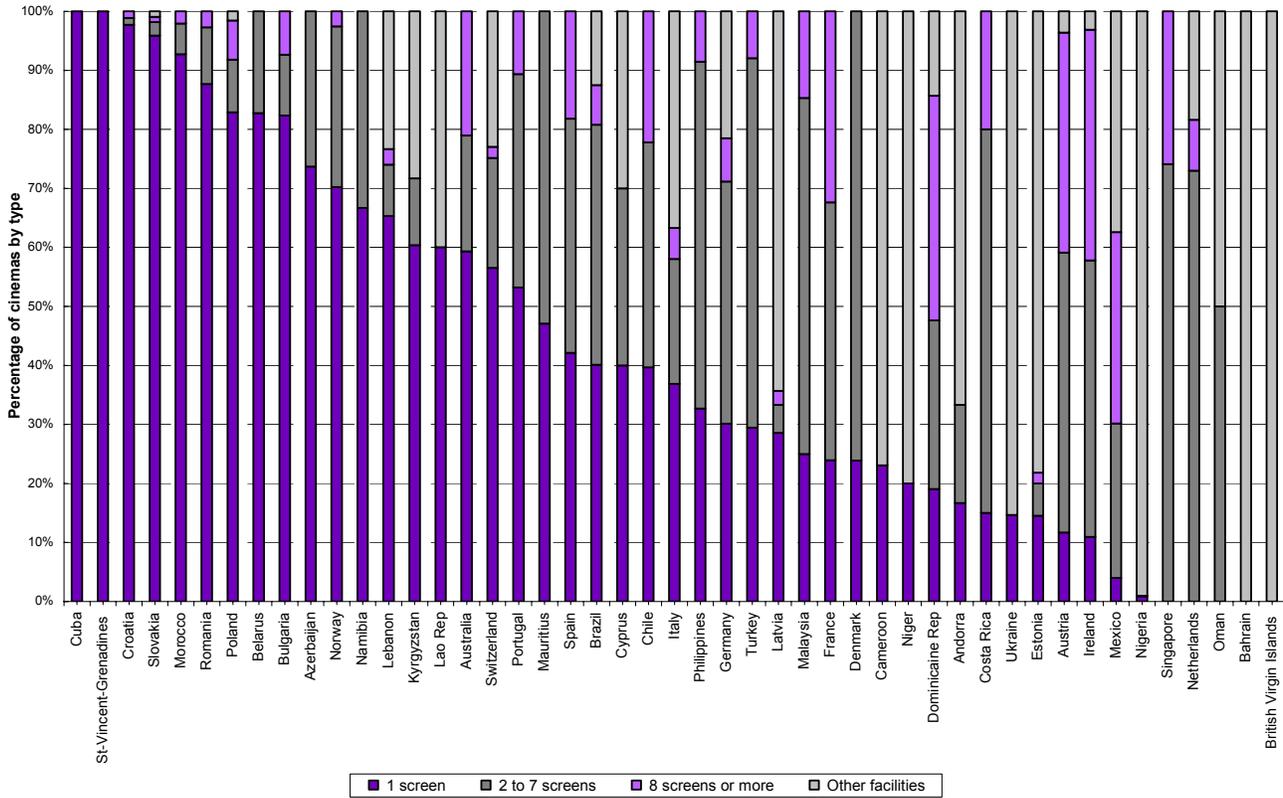
1. Cinema in developing countries

The major trends beginning to appear in the production and consumption of film in developing countries are often difficult to document with precision. An example of this is reflected in the data provided by Nigeria. In 2005, 872 films were produced in video format. These figures place Nigeria on an almost equal footing with India in terms of film production, surpassing that of the United States. The Nigerian film industry is commonly called Nollywood, a phenomenon now known around the world (Esan, 2008). The robust position of Nigeria in film production is due to the fact that the films are shot in digital video format in two or three weeks on small budgets and distributed by 139 distribution companies which are almost entirely Nigerian-owned (97%). Nigerian film production is low-cost, non-institutionalized, high-volume and the films circulate through informal pathways throughout the African continent (Cocq, 2006). This profound change in film production and consumption began in the late 1990s. Since then, the industry has experienced accelerated growth in the country. This change towards video format is now being seen in an increasing number of countries such as Uganda (Aikobua, 2008), Ghana and Kenya. Are we seeing here a sustainable trend, and if so, what are its implications? Will there be a positive influence on film production in Africa in general, and in particular in other countries in West Africa, where it is practically non-existent? It is difficult to answer these questions, given the absence of accurate statistics (UCECAO, 2005).

As shown in **Figure 2**, the phenomenon of multiplexes is mainly found in European countries, since in developing countries there are few cinemas with more than eight screens. The absence of multiplexes could be explained by the considerable increase in “home theatre” equipment abetted by the sale and rental of pirated videos and the multiplication of “video theatres”, where the admission price is very cheap and mainly pirated videos are projected (Chabasseur and Cazaux, 2006). This phenomenon is reflected in Nigeria, where 99% out of 4,871 cinemas are “video theatres” in place of traditional theatres. In developing countries, going out to see a movie is a more onerous leisure activity than in developed countries. Therefore, it is generally confined to the upper classes and, thus, limiting its potential for growth (Cocq, 2006).

Digital film production has given birth to a two-edged sword. On the one hand, it has allowed for the rapid expansion of the film industry in certain African countries, such as Nigeria, because it is low-cost and self-financed. On the other hand, the pirating of films is likely contributing to the eventual shrinking of the film sector (Barlet, 2006). The digital trend seems relatively widespread in Africa as well as in Latin American and the Caribbean, but its real size from a statistical point of view remains to be established.

Figure 2. Distribution of cinemas by number of screens, 2006



Source: UNESCO Institute for Statistics, April 2009.

2. Statistics on production

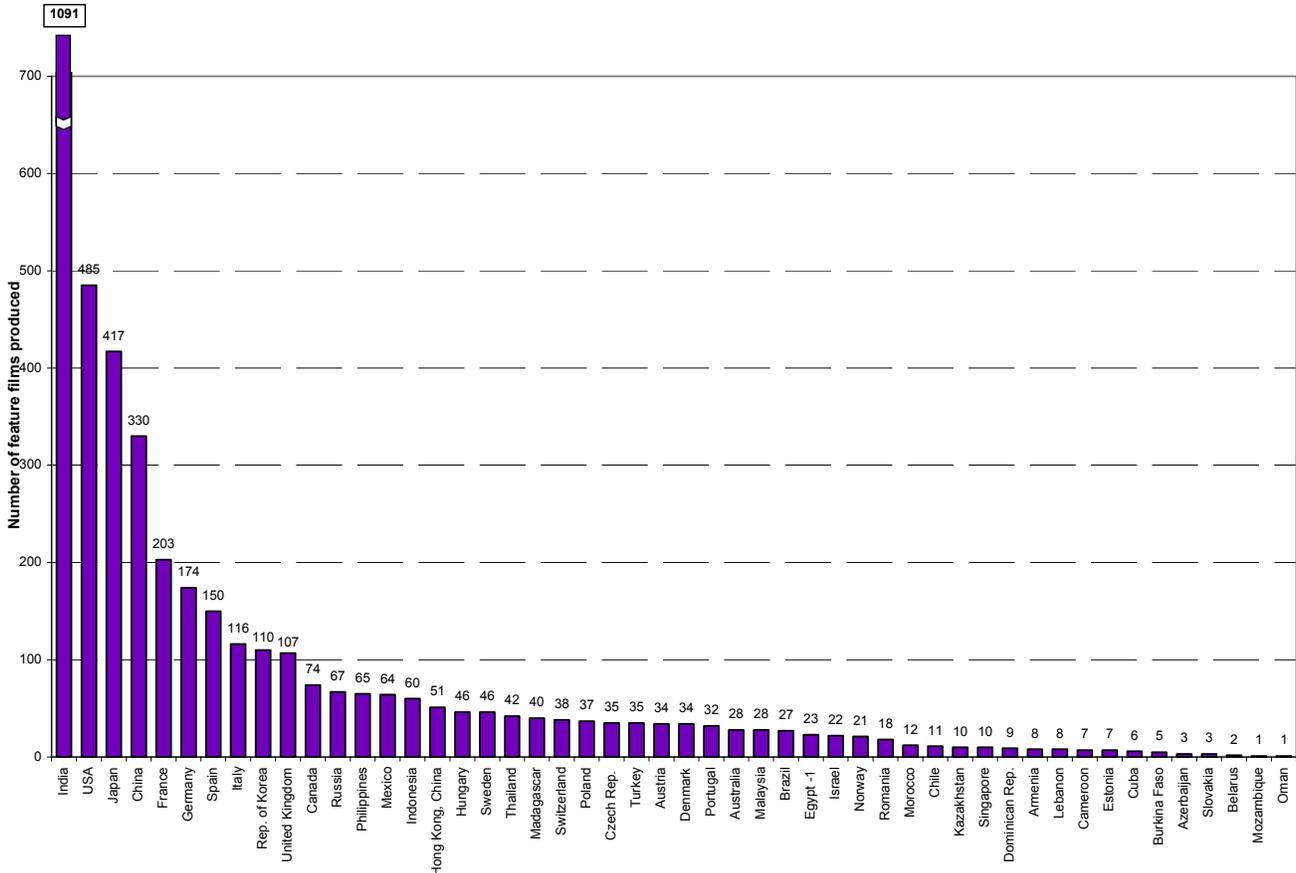
As presented in Figure 3, data on film production confirms a ranking of main film producers that has existed for a number of years, with India as the top producer (1,091 films produced in 2006). Nigeria would rank second with 872 productions in 2005, exclusively in video format. However, this type of film statistics is limited to productions that are shown in cinemas and produced in 35mm format, whereas all Nigerian productions are distributed and shown in private homes or video theatres.

In the United States, 485 films were produced in 2006¹ which puts it in second place for that year. Other major film producers only number eight and comprise countries that generally made more than 100 films in 2006: Japan (417 films), China (330), France (203), Germany (174), Spain (150 films), Italy (116), South Korea (110) and the United Kingdom (104 films).

¹ Based only on data from the Motion Picture Association of America (MPAA).

In addition to China and Japan, Asia was well-represented by the Philippines, which produced 65 films in 2006, followed by Thailand with 42 films and Malaysia with 28. Total production of films by countries in the European Union increased by 8% between 2005 and 2006 (European Audiovisual Observatory, 2007). This increase was essentially due to expanded production in Hungary (46 films in 2006 compared to 26 in 2005), Germany (174 compared to 146) and Italy (116 compared to 98).

Figure 3. Number of feature films produced in 2006



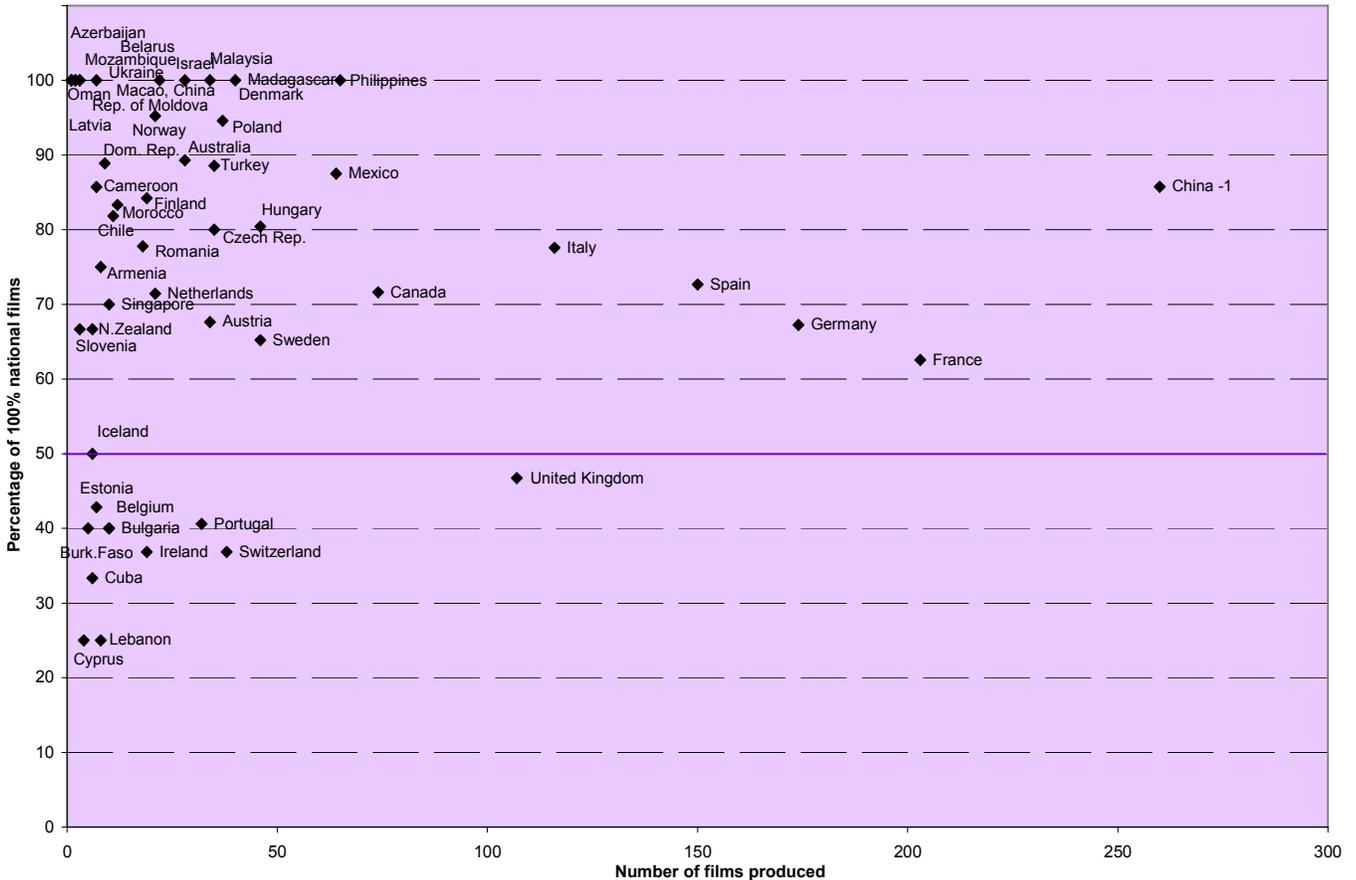
Source: UNESCO Institute for Statistics, April 2009.

As shown in Figure 4, the results reveal that the co-production of films is mainly a phenomenon involving big producers in developed countries. As such, in 2006 France, Germany, Italy and Spain were the biggest co-producers of films, with rates ranging from 47% to 78%. On the opposite end of the scale, China's co-production rate was 14%. This can be explained in part by European agreements on co-production. Indeed, the *European Convention on Cinematographic Co-production* encourages the development of European co-productions according to criteria set by *Eurimages*, which is the Council of Europe's support fund. Between 2001 and 2005, the biggest donors were France, Germany, Italy, Spain and the United Kingdom (European Commission, 2007). The results of the survey also reveal that most co-productions were between Member States of the European Union.

The majority of countries (70%) who produced fewer than 30 films in 2006 had a co-production rate below 40%. This can be explained by the fact that the respondent countries do not have the financial resources to produce a film in the traditional manner. In a recent study, the European Audiovisual Observatory demonstrated the positive role played by co-production of films between developing countries and the European Union. The result has been increased success of these types of films, though it remains modest. Indeed, this phenomenon has both facilitated access to the European market and increased cinema attendance rates for co-produced films compared to 100% foreign-produced films (Kanzler and Lange, 2008).

Given the virtual non-existence of public funding devoted to film production in African countries, the co-production phenomenon is essentially based on support programmes established by European countries. However, these present their own problems, including a heavy administrative burden, possible impediments to the development of African film production companies, the dominant influence of European taste and the homogenisation of production (Cocq, 2006).

Figure 4. The role of co-production in national film production in 2006

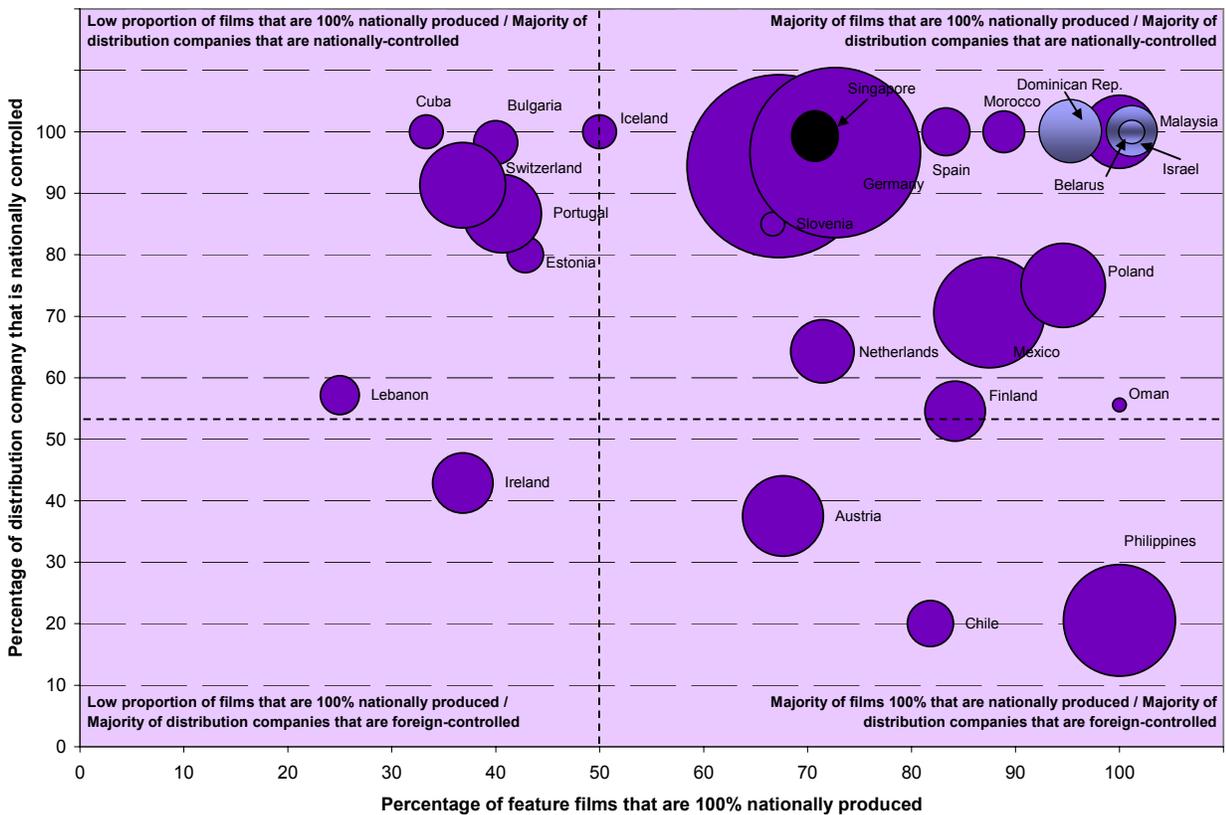


Source: UNESCO Institute for Statistics, April 2009.

3. Distribution and box office statistics

It is often implied that the nationality of distribution companies influences the origin of films that are distributed. The possible result is that films produced nationally are mainly distributed by nationally-controlled companies. **Figure 5** partially illustrates this fact, since in 2006 three-fifths of the countries in the 100% national production category overlapped with those who had mainly nationally-controlled distribution companies. However, there were certain exceptions. In Austria, Chile and the Philippines, film production was primarily national, while the distribution companies were mainly foreign-controlled. In Bulgaria, Cuba, Estonia, Lebanon, Portugal and Switzerland, the majority of distribution companies were nationally-controlled, but national film production was low.

Figure 5. Proportion of 100% nationally-produced films compared to proportion of 100% nationally-controlled distribution companies (2006)

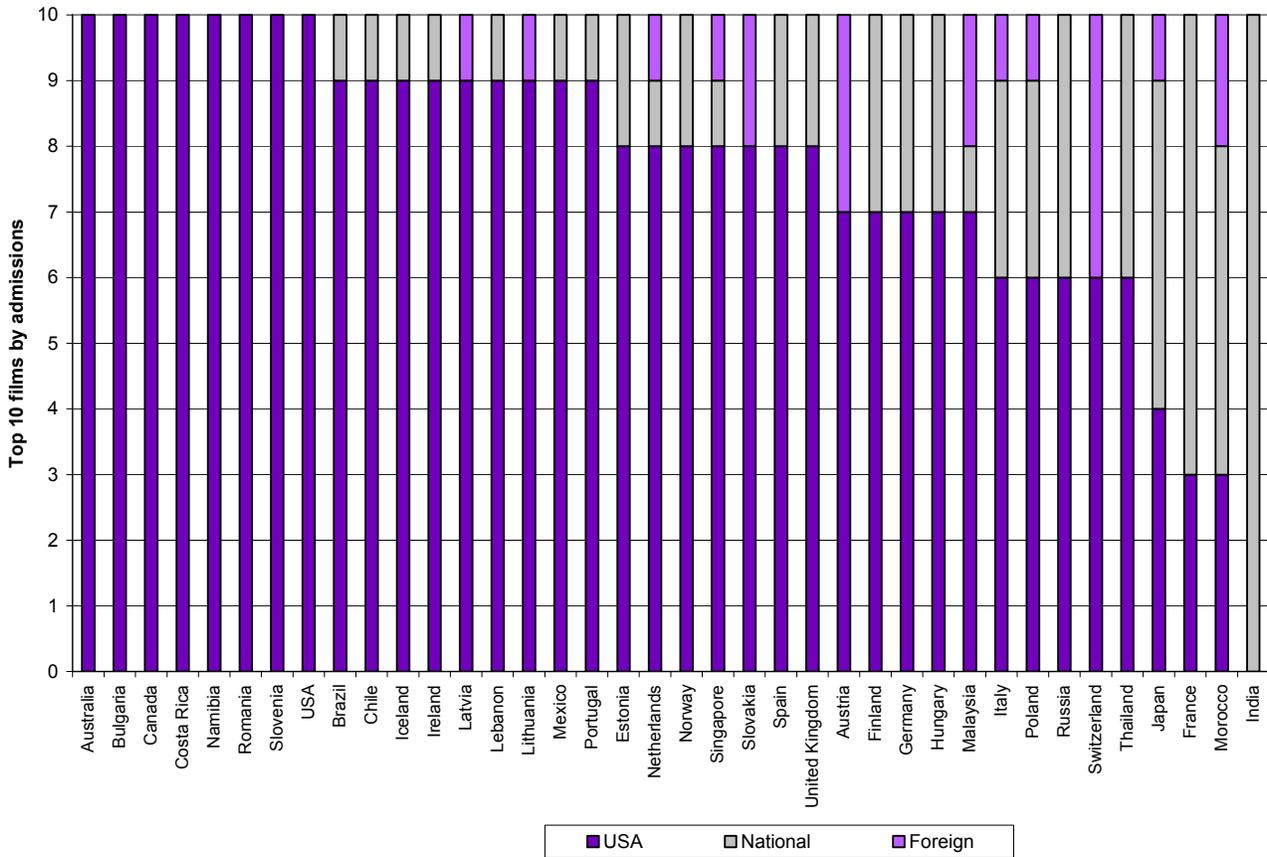


Source: UNESCO Institute for Statistics, April 2009.

Data on box office admissions were rather limited. **Figure 6** shows that in a majority of selected countries in 2006, the top 10 films by admissions were of U.S. origin. Notable exceptions were India, whose top 10 were films made in that country, and France, Japan and Morocco, where the proportion of national films in the top 10 exceeded that of foreign films.

With regard to foreign films not including the United States, two trends were observed. Films in the same geographic region were often the most seen. This was the case for Switzerland, where foreign films mainly came from France, Germany and the United Kingdom, and Malaysia, where foreign films were from Australia and China. In addition, the origin of foreign films was often related to language. This was the case for Austria, where foreign films originated from Germany, and Morocco, where they originated from Egypt.

Figure 6. Origin of top 10 films by admissions in selected countries, 2006



Source: UNESCO Institute for Statistics, April 2009.

4. Digitization and the language in which films are shot

Though based on a limited number of responses, it appears that digital production is well underway in almost all responding countries. In 16 out of 19 countries, more than 50% of national film production was digital in 2006, either shot in this format or converted in post-production. Of 171 digital films, 58% were shot in this format and 42% were in this format in post-production, which suggests significant awareness of the importance of digital production for the future of filmmaking. This is even more significant in that these figures were drawn from a disparate group of countries, of which only 3 of the 19 can be considered developed countries.

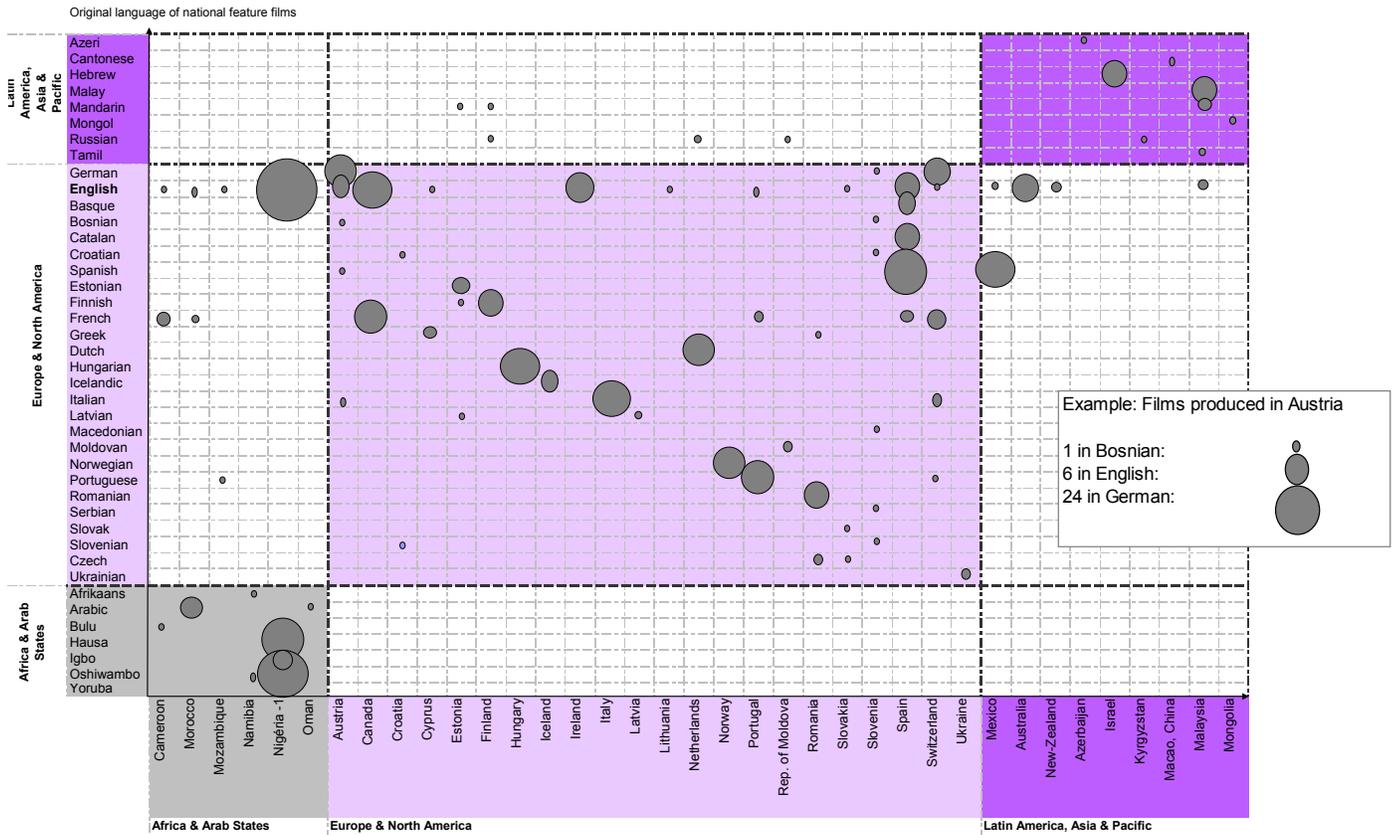
There was considerable growth in cinemas with digital projection. The numbers of such cinemas increased by 253% in one year, going from 848 in 2005 to 2,996 in 2006. The highest growth rates were observed in China, South Korea and the United States. Digital cinemas are expanding internationally. In 2006, 35 countries had at least one digital cinema; by 2007, this had increased to 44 countries (European Audiovisual Observatory, 2007).

It is interesting to examine the language in which films are produced. Out of 38 countries covered, 44 distinct languages were identified. More than one-half of these countries indicated more than one language of production, the number varying between one and six languages. Three situations may explain the multiplicity of production languages in the same country. The first is the existence of a number of official languages in the country (Cameroon, Canada, Namibia, Nigeria, Malaysia, Morocco, Spain and Switzerland). The second is the use of languages from neighbouring countries (Austria, Croatia, Romania and Slovak Republic). The third is the attraction of widespread languages (Arabic, English, French and Spanish).

Figure 7 shows the variety of languages used in theatrical feature films in 2006. In most African, Asian and Arab countries which responded to the questionnaire, "local" languages were used for feature films. However, with 36% of films being produced in English, this still remains the most widespread language used.

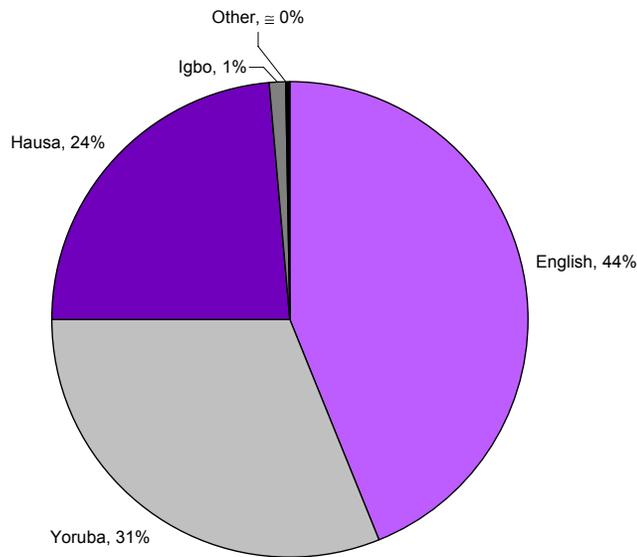
These limited results relating to language are very encouraging, but much remains to be done in this respect, especially in terms of the predominance of one language over another. Figure 7 shows that in 2006 the four languages of film production in Nigeria were, in numerical order: English, Yoruba, Hausa and Igbo. A study conducted on films exhibited in Nigerian cinemas (Nigerian Film Corporation, 1997-2003) corroborates these statistics. It revealed that between 1997 and 2003 (see **Figure 8**), English was the primary language of production, accounting for 44% of films, followed by Yoruba (31%), Hausa (24%) and Igbo (1%).

Figure 7. Number of feature films by language and country in 2006



Source: UNESCO Institute for Statistics, April 2009.

Figure 8. Languages of film production in Nigeria in 2003



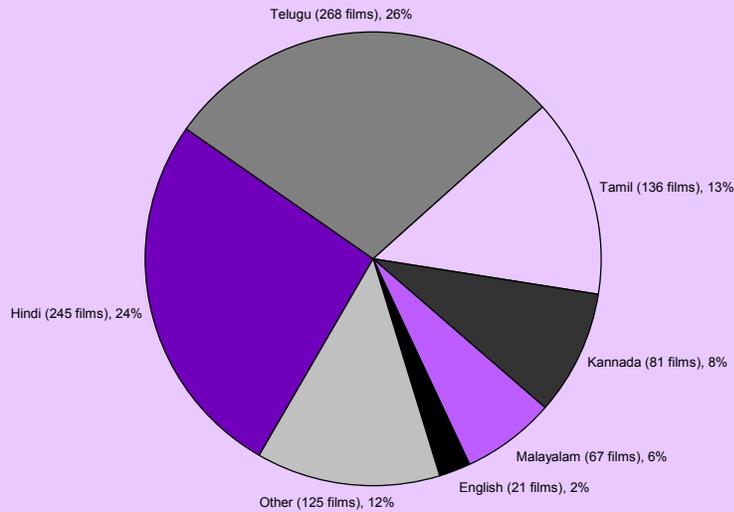
Source: Nigerian Film Corporation, 1997-2003.

However, no international compilation on cinema incorporates questions on the language of production or the number of projections and admissions by language of film. There are statistics of this nature in certain countries, such as Belgium, Canada and India (see **Box 1**), but they seem to be the exception. This kind of information may be important in terms of the diversity of cultural expression.

Box 1. Diversity of languages in Indian cinema

Multilingualism is a dominant reality in India, which has 23 official languages, of which English is preponderant in terms of official business. Indian cinema incarnates this phenomenon, since film production is conducted in about 30 languages. The largest regional film industries, which are primarily related to the main linguistic groups (Hindi, Tamil, Telugu, Bengali, Marathi, Kannada, Oriya and Malayalam), are supported by their respective states. Therefore, beyond the Hindi and Urdu film industry based in Mumbai, commonly known as Bollywood, other major regional film industries are blossoming – Tamil (Kollywood), Telugu (Tollywood) and Malayalam (Mollywood). In addition, films coming from the regional industries are distinguished from those of Bollywood by their stories and themes, which evoke the culture of their region. The Tamil film industry is the second largest in India after Bollywood. In 2005, revenue from the Tamil film industry was assessed at US\$100 million.

Figure 9. Percentage of Indian movies by languages produced in 2005



Source: Focus 2007, *World Film Market Trends*, European Audiovisual Observatory.

Conclusion

The lack of statistics for certain indicators impedes the drawing of general conclusions on the state of the film industry worldwide. However, the figures that are available do reveal certain major regional developments in the production, distribution and box office admissions of theatrical feature films for the year 2006.

First, the increase in multiplexes (defined as more than eight screens per cinema) continues to accelerate in developed countries, to the detriment of smaller theatres. In contrast, in Sub-Saharan Africa there is a proliferation of "video theatres" mainly as a result of admission prices being much cheaper than in traditional film cinemas.

Second, film production continues to be in full expansion in developing countries such as India, which has the largest film industry in the world. Rapid growth is also occurring in Nigeria and China. In 2006, the United States was the largest film producer in the developed world, followed by Japan and certain countries in the European Union. Co-production mainly involved France, Germany, Italy, Spain and the United Kingdom.

Third, digital film production is well underway in developing countries. It may be an indicator of change and perhaps growth in some of these countries, in terms of production, post-production, distribution and box office. This is because it provides substantial economies of scale. However, legislation on the pirating of films should be introduced and enforced to put into practice the notion of copyright and intellectual property rights (Barlet, 2006).

With regards to the language of production, it is interesting to note that in certain African countries regional languages are showing some strength. This phenomenon is clearly seen in Nigeria, where the official language is English, but a good number of films have been shot in native languages such as Yoruba and Hausa.

The absence of statistics in developing countries and the existence of an informal and undocumented film sector limit the scope of analysis. Therefore, it is difficult to quantify globally the cinema sector in terms of box office receipts, job creation, inter-regional trade or distribution companies. The expansion of piracy is a major issue in developing countries and would severely undermine the development of a film industry in these countries in the long term.

Appendix

Statistical Table 1. Data on feature film production, distribution, and cinemas

Country or territory	2006						
	Production			Distribution		Infrastructure	
	Number of feature films nationally produced	% of feature films 100% nationally produced	% of feature films that were co-productions	Number of film distribution companies	% of distribution companies nationally-controlled	Number of cinemas	% multiplexes
Sub-Saharan Africa and Arab States							
Bahrain	...	...	...	...	...	26	m,a
Benin	...	...	...	...	...	7	a,m,-4
Burkina Faso	5	40	60	...	...	19	a,m,-2
Cameroon	7	86	14	...	...	13	...
Egypt	23	-1, ±,h	...	11	...	218	...
Lebanon	8	25	75	14	57	150	3
Madagascar	40	±,h	100	...	...	...	...
Mali	...	...	...	...	...	11	a,m,-5
Mauritius	...	...	...	6	100	17	...
Morocco	12	83	17	7	100	96	2
Mozambique	1	100	...	...	...	12	...
Namibia	1	-1	100	-1	...	3	...
Niger	...	...	...	...	...	5	...
Nigeria	k	-1	...	139	97	4,871	...
Oman	1	100	...	9	56	18	...
Senegal	...	...	...	...	...	22	a,m,-4
South Africa	...	...	...	...	...	815	b,m
Tunisia	...	...	...	...	...	22	a,m,-1
United Arab Emirates	...	...	...	...	...	202	b,m
Asia and the Pacific							
Armenia	8	75	25	...	...	...	...
Australia	28	89	11	29	...	494	21
Azerbaijan	3	100	...	...	...	19	...
Cambodia	62	98	2	...	...	14	0
China	330	q	...	...	...	37,753	b,m
Hong Kong, SAR of China	51	b	...	...	...	212	b,m
Macao, China	1	100	...	...	...	4	...
India	1,091	b	...	...	...	11,183	b,m,-1
Indonesia	60	b	...	...	...	929	b,m
Iran (Islamic Republic of)	...	...	...	...	...	244	b,mb,-1
Israel	22	100	...	12	100	58	17
Japan	417	b	...	...	...	3,062	b,m
Kyrgyzstan	1	...	100	...	...	53	...
Lao People's Democratic Republic	...	...	...	1	100	5	...
Mongolia	1	±	...	...	...	...	...
Malaysia	28	100	...	529	±	100	68
New Zealand	6	67	33	...	...	...	...
Philippines	65	100	...	239	21	211	9
Republic of Korea	110	b	...	...	...	1880	b,m
Singapore	10	70	30	7	100	27	26
Thailand	42	b	...	...	...	671	b,m

Country or territory	2006												
	Production			Distribution			Infrastructure						
	Number of feature films nationally produced	% of feature films 100% nationally produced	% of feature films that were co-productions	Number of film distribution companies	% of distribution companies nationally-controlled	Number of cinemas	% multiplexes						
Europe and North America													
Andorra	...	...	...	...	...	6	...						
Austria	34	c	68	c	32	c	24	e, -1	38	582	c,m	37	c,n
Belarus	2		100		...		7		100	139		...	
Belgium	10	c	40	c	60	c		e, -1	...	507	c,m	...	c,n
Bulgaria	10		40		60		56		98	68		7	
Canada	74		72		28				...			...
Croatia	2		...		100		7		100	87	±	1	
Cyprus	4		25		75		5		...	10		-	
Czech Republic	35	c	80	c	20	c	17	e, -1	...	701	c,m	...	c,n
Denmark	34	±, h	100		...			e, -1	...	385	±	...	c,n
Estonia	7		43		57		5		80	55		2	
Finland	19		84		16		11		55	205		2	a,n
France	203	f	63	f	37	f	108	f, -1	...	5,362	f,m	32	f,n
Germany	174		67		33		89		94	1823		7	
Gibraltar	-		-		-		...		...	...		...
Greece	23	c	78	c	22	c	14	e, -1	...	...		...
Hungary	46	c	80	c	20	c	13		...	216		6	
Iceland	6		50		50		4		100	22		...	
Ireland	19		37		63		7		43	64		39	
Italy	116		78		22		36		...	1,910	c,m	5	c,n
Latvia	2		100		...		4		...	42		2	
Lithuania	1		...		100		6		67	48		4	
Luxembourg			...		...				...	24	c,m	42	c,n
Malta	...		...		...		1	e, -1	...	...		...
Moldova (Republic of)	3		100		...		7		100	8		...	
Netherlands	21		71		29		14	e, -1	64	163		9	c,n
Norway	21		95		5		16	e, -1	...	235		3	c,n
Poland	37		95		5		28		75	514		7	c,n
Portugal	32		41		59		15		87	141		11	c,n
Romania	18		78		22		17		...	73		3	
Russian Federation	67	a, p	...		...		47	e, 1	...	1,294	±, c, m	...	
Slovakia	3		...		100		11		73	217		1	
Slovenia	3		67		33		20		85	57		7	
Spain	150		73		27		176	±	97	990		18	
Sweden	46	c	65	c	35	c	25	e, -1	...	1,171	c,m	...	
Switzerland	38		37		63		46	*	91	414	*	2	*
Turkey	35		89		11		16	e, -1	...	302		8	c,n
Ukraine	7		100		...		13		100	2,740		...	
United Kingdom	107	g	47	g	53	g	67	g	...	697	g	...	
United States of America	485	±, a	...		...				...	38,415	c,m	...	

Country or territory	2006						
	Production			Distribution		Infrastructure	
	Number of feature films nationally produced	% of feature films 100% nationally produced	% of feature films that were co-productions	Number of film distribution companies	% of distribution companies nationally-controlled	Number of cinemas	% multiplexes
Latin America and the Caribbean							
Argentina	...	...	...	...	...	978 ^{c, m}	...
Brazil	27 ^{±, o}	...	...	29	79	880	7
British Virgin Islands	...	...	...	...	...	1	...
Chile	11	82	18	20	20	63	22
Colombia	...	...	...	...	...	447 ^{m, -1}	...
Costa Rica	...	...	...	2	100	20	20
Cuba	6	33	67	1	100	437	...
Dominican Republic	9	89	11	1 ⁱ	100	21	38
Mexico	64	88	12,5	17	71	802 [*]	32 [*]
Saint Vincent and the Grenadines	...	...	...	...	...	2	...

NOTES:

- a. Source: European Audiovisual Observatory (2007). Focus: World Film Market Trends 2007.
- b. Source: European Audiovisual Observatory (2008). Focus: World Film Market Trends 2008.
- c. Source: European Audiovisual Observatory (2007, 2006). Yearbook 2008: Film and Video, Volume 3.
- d. Estimate drawn from European Audiovisual Observatory (2007, 2006). Yearbook 2008: Film and Video, Volume 3.
- e. Source: European Audiovisual Observatory (2007). Film Distribution Companies in Europe.
- f. Source: Centre national de la cinématographie.
- g. Source: UK Film Council.
- h. Only includes films that were 100% nationally produced.
- i. Only includes companies with majority nationally-controlled
- j. Multiplex = Cinema with 8 screens or more.
- k. Films produced in Nigeria are shot on digital video. This country produced 872 feature films in 2005.
- l. In Australia, multiplexes are defined as cinemas comprising at least 7 screens.
- m. Number of screens.
- n. Percentage (%) of screens in multiplexes.
- o. Includes only co-productions with majority national financing.
- p. Only films produced and exhibited nationally
- q. Source : www.screendigest.com

- ... Data not available
- Nil (value exactly zero)
- 0 Virtually zero (less than half of the last decimal)
- . Not applicable
- ± Partial data
- +n Data refers to "n" years after the reference year
- n Data refers to "n" years before the reference year

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UNESCO Institute for Statistics
P.O. Box 6128
Succursale Centre-Ville
Montreal, Quebec H3C 3J7
Canada

Tel: (1 514) 343-6880
Fax: (1 514) 343-5740
Email: information@uis.unesco.org