

FROM INTERNATIONAL BLOCKBUSTERS TO NATIONAL HITS ANALYSIS OF THE 2010 UIS SURVEY ON FEATURE FILM STATISTICS

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The film industry is one of the most lucrative and best-documented of the world's cultural industries. As technology alters the ways in which cinema is produced, distributed and consumed, the need for comparable data has never been greater in order to understand the impact of these changes on the industry and contemporary culture. The UIS biennial Survey on Feature Film¹ Statistics offers a unique portrait of an industry in transition with measures of production, distribution and consumption worldwide that provide comparisons among different countries and cultural contexts, shedding light on cultural diversity in this sector.

1. INTRODUCTION

National cinema is part of an international marketplace, characterised by a cross-border flow of talent and a global circuit of festivals and awards. Currently, major technological changes in the global film industry are altering patterns of production and consumption. Against this backdrop, this bulletin presents a snapshot of the geographical divide between big film-producing countries which dominate global cinema production and consumption, and the smaller – but still vibrant – markets for domestic films.

Today, most films are seen away from traditional cinemas and increasingly involve formats other than celluloid for shooting, editing and production.² Some experts have noted the rise of “transmedia” cultural forms, in which characters, settings and storylines develop across print, film and web-based media.³ Feature film maintains a central position in transmedia works, but it is one format among many. Furthermore, the growing transnational integration of parts of the feature film industry – as evidenced by the prominence of international co-productions in some regions – means that conventional definitions of “national cinema” no longer apply.

Over the years, the UIS Survey on Feature Film Statistics has been refined to reflect changes in the film industry. The 2010 version includes questions on feature films in video format (Section 5 of the questionnaire) and television and video on demand (Section 6). While the focus of the survey remains on features intended for commercial exhibition in cinemas, this expansion attempts to capture the increasing integration of film with other media in terms of industrial practice, technological standards and audience consumption. These additions are important developments for the survey, though responses to these sections of the questionnaire were not complete enough to warrant full discussion here.

¹ A “feature film” is defined as at least 60 minutes long and intended for commercial exhibition in cinemas. For further details, refer to UIS Feature Film Questionnaire: <http://www.uis.unesco.org/UISQuestionnaires/Pages/Culture.aspx>

² Paul MacDonald and Janet Wasko, eds., *The Contemporary Hollywood Industry*, Oxford: Blackwell Publishing, 2008.

³ Henry Jenkins, *Convergence Culture: Where Old and New Media Collide*, New York: New York University Press, 2006.

UIS data can be used for comparative analysis across five years, from 2005 to 2009⁴. Some challenges, however, prevent the drawing of generalised conclusions from a cross-year analysis. The global financial crisis that began in 2008 in the United States reverberated throughout the world and affected many industries, including the audiovisual sector. The related devaluing of the U.S. dollar, which is the unit of monetary comparison for the UIS survey, may account for some year-to-year differences, making it difficult to assess, for instance, changes in average ticket prices from 2008 to 2009. The current economic climate, brought on by the 2008 financial crisis, may represent a lasting state of financial instability for all countries alike. It is possible, therefore, that 2009 figures are a reasonable benchmark for future activity.

2. CHARACTERISTICS OF THE GLOBAL TOP 20 FEATURE FILMS

The list of global Top 20 films is a measure of audience preferences, using a weighted score to rank films by popularity. To create this list, the UIS questionnaire requested countries to identify the 10 most popular feature films over three years, from 2007 to 2009. Most countries measured this popularity by cinema admissions, though a few used gross box office revenue.

Compiling the 20 most popular films reported for each of the three years, **Table 1** presents the weighted scores for the global Top 20, with a first-ranked film receiving a “10” and a tenth-ranked film receiving a “1”. The range of weighted scores for the Top 20 runs from 450 (*Ice Age: Dawn of the Dinosaurs*) to 18 (*Madagascar: Escape 2 Africa*) in 2009; from 254 (*Kung Fu Panda*) to 20 (*Bathory*) in 2008; and from 374 (*Pirates of the Caribbean: At World’s End*) to 13 (*I Served the King of England*) in 2007. The top number shows the degree of similarity across countries for the most popular films of the year. These were the feature films viewed by the widest international audiences.

However, the rapid drop in scores for films in the No. 20 position indicates a level of diversity in audience preference, even for the most popular films. In 2007, *I Served the King of England* only had to rank No. 2 in the Czech Republic and No. 7 in Slovakia to receive a sufficient score to be listed among the global Top 20.

Different characteristics are seen each year. The tables for 2007 and 2009 have relatively high scores for the top three films, while in 2008 the first six films are grouped in the 200 range. However, lower down the ranking, where feature films were popular and/or lower-ranked in fewer countries, the weighted scores drop precipitously. For 2009, the score falls from 154 for *Transformers: Revenge of the Fallen* (No. 8) to 64 for *Slumdog Millionaire* (No. 9); for 2008, the score sinks from 223 for *Indiana Jones and the Kingdom of the Crystal Skull* (No. 6) to 121 for *Hancock* (No. 7); and for 2007, the score is split between 83 for *300* (No. 9) and 50 for *Night at the Museum* (No. 10).

⁴ The UIS 2010 survey included coverage of 115 countries (55%). See **Appendix I** for a coverage map, graphs and additional information on responses to the survey.

TABLE 1. GLOBAL TOP 20 FEATURE FILMS, 2007-2009

2007						
Rank	Top 20 feature films	Origin	Type	Language	Weighted scores	Sequel/franchise *
1	Pirates of the Caribbean: At World's End	USA	Fiction - Action/Adventure	English	374	Yes
2	Harry Potter and the Order of the Phoenix	GBR/USA	Fiction - Action/Adventure	English	333	Yes
3	Shrek the Third	USA	Animation - Family	English	290	Yes
4	Spider-Man 3	USA	Fiction - Action/Adventure	English	239	Yes
5	Ratatouille	USA	Animation - Family	English	197	No
6	The Simpsons Movie	USA	Animation - Family	English	166	Yes
7	Transformers	USA	Fiction - Action/Adventure	English	131	Yes
8	Mr. Bean's Holiday	GBR/FRA/DEU/USA	Fiction - Comedy	English	98	Yes
9	300	USA	Fiction - Action/Adventure	English	83	No
10	Night at the Museum	USA	Fiction - Family	English	50	Yes
11	Live Free or Die Hard	USA/GBR	Fiction - Action/Adventure	English	43	Yes
12	Rush Hour 3	USA	Fiction - Action/Adventure	English	28	Yes
13	The Bourne Ultimatum	USA/GBR/DEU	Fiction - Action/Adventure	English	26	Yes
14	Ocean's Thirteen	USA	Fiction – Drama	English	21	Yes
15	Taxi 4	FRA	Fiction - Action/Adventure	French	20	Yes
16	Fantastic Four: Rise of the Silver Surfer	USA/DEU/GBR	Fiction - Action/Adventure	English	18	Yes
17	The Irony of Fate 2	RUS	Fiction - Comedy	Russian	17	Yes
18	Empties	CZE/GBR	Fiction - Comedy	Czech	16	No
19	I Am Legend	USA	Fiction - Action/Adventure	English	14	No
20	I Served the King of England	CZE/SVK	Fiction - Comedy	Czech (German)	13	No

2008						
Rank	Top 20 feature films	Origin	Type	Language	Weighted scores	Sequel/franchise *
1	Kung Fu Panda	USA	Animation - Family	English	254	Yes
2	Madagascar: Escape 2 Africa	USA	Animation - Family	English	237	Yes
3	Mamma Mia!	USA/GBR INC/DEU	Fiction - Musical	English	237	No
4	Quantum of Solace	GBR INC/USA	Fiction - Action/Adventure	English	233	Yes
5	The Dark Knight	USA/GBR INC	Fiction - Action/Adventure	English	228	Yes
6	Indiana Jones and the Kingdom of the Crystal Skull	USA	Fiction - Action/Adventure	English	223	Yes
7	Hancock	USA	Fiction - Action/Adventure	English	121	No
8	Sex and the City	USA	Fiction - Comedy	English	113	Yes
9	WALL·E	USA	Animation - Family	English	112	No
10	The Mummy: Tomb of the Dragon Emperor	USA/DEU	Fiction - Action/Adventure	English	101	Yes
11	Iron Man	USA	Fiction - Action/Adventure	English	66	Yes
12	Asterix at the Olympic Games	FRA/DEU/ESP/ITA	Fiction – Family	French	61	Yes
13	The Chronicles of Narnia: Prince Caspian	USA/NZL INC	Fiction - Action/Adventure	English	45	Yes
14	Journey to the Center of the Earth	USA	Fiction - Action/Adventure	English	42	Yes
15	Welcome to the Sticks	FRA	Fiction - Comedy	French	38	No
16	The Irony of Fate 2	RUS	Fiction - Comedy	Russian	31	Yes
17	Wanted	USA/DEU/RUS	Fiction - Action/Adventure	English	27	No
18	I Am Legend	USA	Fiction - Action/Adventure	English	26	No
19	Admiral	RUS	Fiction – Drama	Russian	24	No
20	Bathory	CZE/SVK/GBR/HUN	Fiction – Drama	Czech/English/Slovak	20	No

2009						
Rank	Top 20 feature films	Origin	Type	Language	Weighted Scores	Sequel/franchise *
1	Ice Age: Dawn of the Dinosaurs	USA	Animation - Family	English	450	Yes
2	Harry Potter and the Half-Blood Prince	GBR INC/USA	Fiction - Action/Adventure	English	334	Yes
3	2012	USA	Fiction - Action/Adventure	English (Tibetan, Mandarin)	304	No
4	Avatar	USA/GBR	Fiction - Action/Adventure	English	302	Yes
5	The Twilight Saga: New Moon	USA	Fiction – Drama	English	197	Yes
6	Up	USA	Animation - Family	English	188	No
7	Angels & Demons	USA	Fiction - Action/Adventure	English (Italian)	173	Yes
8	Transformers: Revenge of the Fallen	USA	Fiction - Action/Adventure	English	154	Yes
9	Slumdog Millionaire	GBR	Fiction – Drama	English (Hindi)	64	No
10	The Hangover	USA/DEU	Fiction - Comedy	English	57	Yes
11	Fast & Furious	USA	Fiction - Action/Adventure	English	43	Yes
12	Inglourious Basterds	USA/DEU	Fiction - Action/Adventure	English	36	No
13	The proposal	USA	Fiction - Comedy	English	32	No
14	Terminator Salvation	USA	Fiction - Action/Adventure	English	31	Yes
15	Bolt	USA	Animation - Family	English	28	No
16	Millennium 1 - The Girl with the Dragon Tattoo	SWE/DNK/DEU	Fiction – Drama	Swedish	28	Yes
17	Millennium 2 - The Girl Who Played with Fire	SWE/DNK/DEU	Fiction – Drama	Swedish	24	Yes
18	Michael Jackson's This Is It	USA	Documentary	English	23	No
19	Night at the Museum: Battle of the Smithsonian	USA	Fiction – Family	English	23	Yes
20	Madagascar: Escape 2 Africa	USA	Animation - Family	English	18	Yes

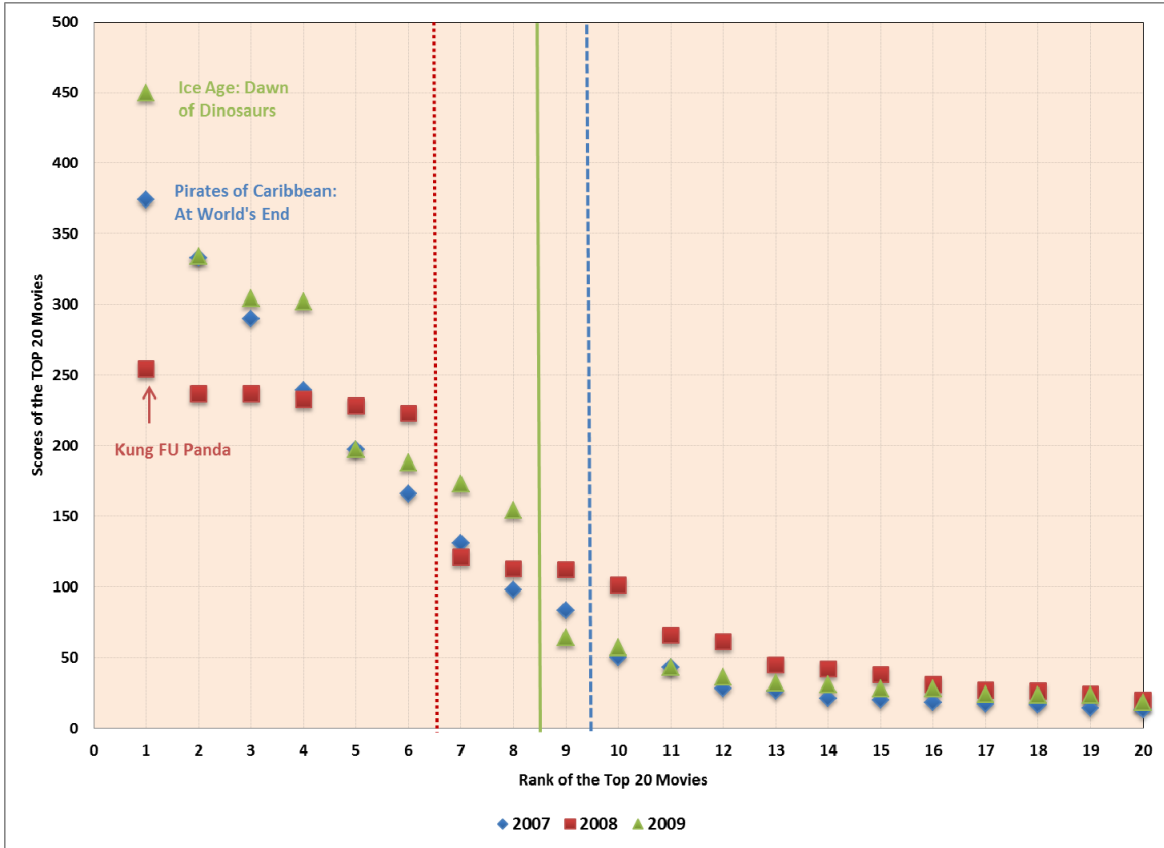
Notes: CZE: Czech Republic
 DNK: Denmark
 FRA: France
 GBR: United Kingdom
 NZL: New Zealand
 SVK: Slovakia
 USA: United States
 DEU: Germany
 ESP: Spain
 ITA: Italia
 HUN: Hungary
 RUS: Russian Federation
 SWE: Sweden

*: For franchises, while many films have connections to merchandise or other media (books, comics, etc.), only the titles that are part of extended film or television properties are recorded here.

Source: UNESCO Institute for Statistics, January 2012.

Figure 1 illustrates the “long tail” of data points after each split⁵.

FIGURE 1. SCORES OF THE TOP 20 FEATURE FILMS, 2007-2009



Source: UNESCO Institute for Statistics, January 2012.

The global Top 20 rankings simultaneously point to the concentration of popularity around the biggest blockbuster films at the top of the list and an increase in diversity of films across different countries at the bottom. Films below the No. 20 rank are generally regional or national titles.

Appendix II presents a compilation of data on the national origin of feature films by the number of appearances on the Top 10 lists of different countries for 2009.⁶ Unlike the weighted global Top 20 rankings, and with no accounting for relative popularity, Appendix II simply shows the range and variety of popular films for the specific year. It presents a tier of popular film culture that is nationally-specific, in contrast to the internationally visible films that are shared among cinema-goers in multiple countries.

⁵ Yearly splits are characterised by their respective color lines.

⁶ Refer to the UIS Data Center for a complete list of titles:
<http://stats.uis.unesco.org/unesco/tableviewer/document.aspx?FileId=519>

COUNTRIES AND LANGUAGE IN THE TOP 20

Figure 1 shows that the 23 feature films (9 for 2007, 6 for 2008 and 8 for 2009) above the first split for each year either originated from or were co-produced by the United States. In contrast, films appearing below the splits are from other countries (Czech Republic, Denmark, Hungary, Italy, New Zealand, Russian Federation, Slovakia, Spain, and Sweden) and in other languages (Czech, French, Russian, and Swedish) are listed.

This linguistic diversity contrasts with feature films above the data-point splits, which are all in English, with the exception of portions of *Angels & Demons* (Italian), *Slumdog Millionaire* (Hindi), and the multi-lingual epic *2012* (Tibetan, Mandarin, French, Italian, Portuguese, Hindi, and Latin). Oddly, one of the most popular films of 2009 was the science fiction film *Avatar* – eventually to become the highest-grossing box office hit ever, partly in an invented language. That same year, the most internationally popular films were in Swedish: *Millennium 1 (The Girl with the Dragon Tattoo)* and *Millennium 2 (The Girl Who Played with Fire)*. In short, even with other languages on the lower end of the list of top-performing feature films, English dominates the world’s most popular films across the three-year period.

Many popular feature films employ a mix of genres. Action films, for example, may target children and incorporate either dramatic or comedic elements, or both. This means that genre categorizations are not definitive. However, it is useful to identify dominant characteristics and certain tendencies for the sake of comparison. Table 1 shows that the most popular genres skew heavily toward action/adventure, with almost one-half of Top 20 films falling into this category (29 films over the three year period). While this category is broad and these films vary from the comedic action of *Rush Hour 3* to comic book drama of *The Dark Knight*, they share an orientation toward action and cinematic spectacle, often featuring state-of-the-art special effects. The family film, whether in animated or live-action form, is the next best represented with 13 films between 2007 and 2009, followed by comedy (9), drama (7), musical (1), and documentary (1).

THE PREVALENCE OF SEQUELS AMONG THE TOP 20

It is worth noting that the majority of Top 20 films are sequels or franchise properties. Thus, they are the product of existing characters and storylines, i.e. they have previously been filmed or have a presence in other media (merchandise, comics, novels or other moving image formats). In 2007, 15 of the Top 20 films were sequels or franchises; in 2008 there were 12, and in 2009 there were 13, which together represent 67% of the Top 20. The proportion of sequels and franchises increases to 78% if Top 23 films are only considered.

These franchised works have recently become known as “transmedia” properties. The ability to develop such works, and to exploit their familiarity over time, disproportionately resides with the largest international media conglomerates. Corporate entities like Comcast, Disney, Fox, Sony, Time-Warner, and Viacom have holdings in different media in addition to their film units. They can risk large investments on properties – including production and promotion budgets for single films that surpass comparable film spending in most countries – and can withstand losses in one media format (feature film theatrical release) in the expectation of profits from distribution in other formats (DVDs or other merchandise).⁷

A significant qualification is necessary. These results illustrate popularity in movie theatres and do not account for titles seen outside official, commercial, and public screening facilities. In other words, the global Top 20 feature film rankings capture one mode of cinematic consumption, associated with one type of location.

⁷ Paul MacDonald and Janet Wasko, eds., *The Contemporary Hollywood Industry*, Oxford: Blackwell Publishing, 2008; Jennifer Holt and Alisa Perren, eds., *Media Industries: History, Theory, and Method*, Malden, MA: Wiley-Blackwell, 2009; Toby Miller, Nitin Govil, John McMurria, Richard Maxwell, and Ting Wang, *Global Hollywood 2*, London: BFI Publishing, 2008.

3. FILM PRODUCTION

Despite the global economic downturn following 2008, world feature film production increased. Indeed, production increased by 27.8% between 2005 and 2009, despite significantly lower levels of production in 2007 and 2008 (see **Table 2**). In 2009, five countries had unmatched levels of production volume: India, Nigeria, the United States, Japan and China (descending order), accounting for 54.4% of world production (see **Table 3 and Figure 2**).

TABLE 2. WORLD PRODUCTION OF FEATURE FILMS, 2005-2009

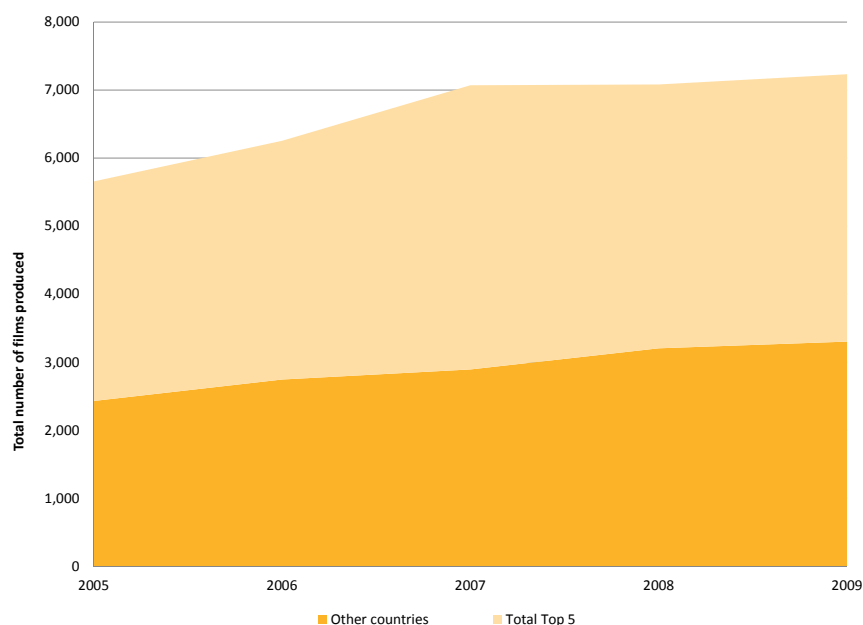
	2005	2006	2007	2008	2009	
World production	5,658	6,255	7,071	7,083	7,233	
Countries covered	95	90	95	98	100	
Share of the Top 5	57.1%	56.1%	59.1%	54.8%	54.4%	
	2005-2006	2006-2007	2007-2008	2008-2009	2005-2009	Average 2005-2009
Growth rate	10.6%	13.0%	0.2%	2.1%	27.8%	6.5%

TABLE 3. TOP 5 COUNTRIES WITH MAJOR FILM PRODUCTION, 2005-2009

2005		2006		2007		2008		2009	
India	1,041	India	1,091	Nigeria	1,559	India	1,325	India	1,288
Nigeria	872	Nigeria	1,000	India	1,146	Nigeria	956	Nigeria	987
United States	699	United States	673	United States	656	United States	759*	United States	734*
Japan	356	Japan	417	China	411	China	422	China	475
China	260	China	330	Japan	407	Japan	418	Japan	448

* Break in data series due to a change in methodology; not comparable with previous data series.
Source: UNESCO Institute for Statistics, January 2012.

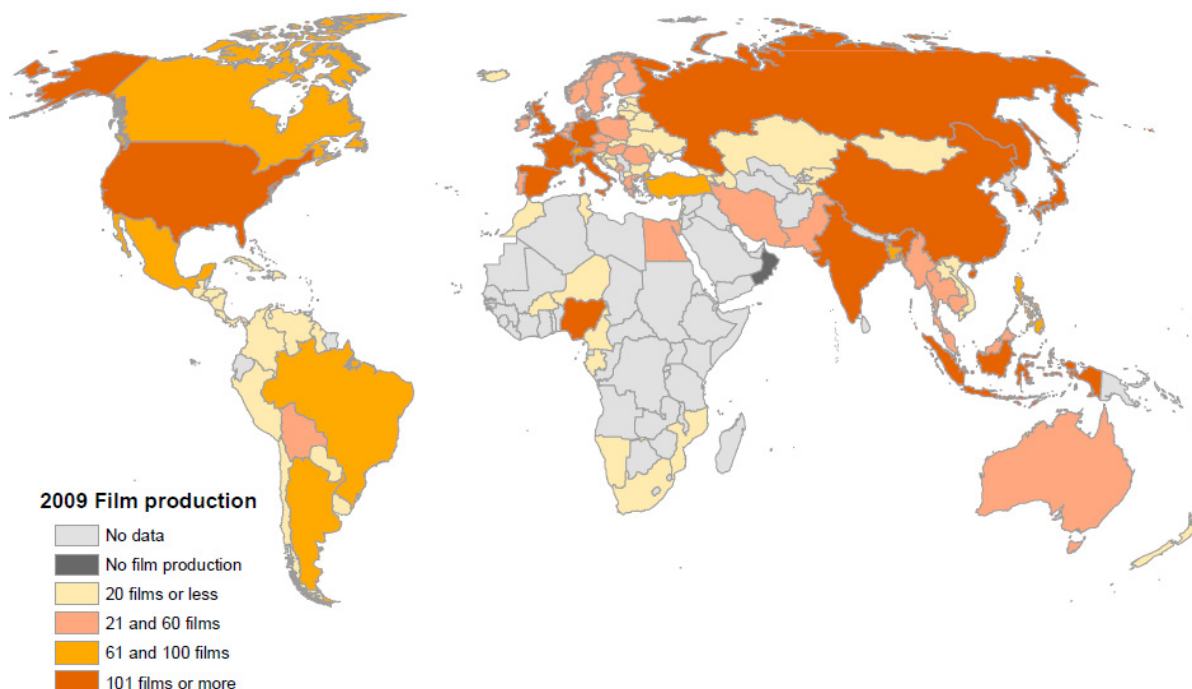
FIGURE 2. SHARE OF THE WORLD'S TOP 5 FILM PRODUCERS, 2005-2009



Source: UNESCO Institute for Statistics, January 2012.

In **Figure 3** the world map of feature film production presents the clear concentration of activity in a few countries. It should be noted that country-level data mask the geographical unevenness of production within countries. In fact, certain cities or regions are production centers, with a disproportionately high concentration of facilities and talent (Hollywood is a good example). The case of Nigeria illustrates the map's discrepancy. Although many countries in the region did not provide data for the survey, the majority of sub-Saharan Africa's production originates in Nigeria, making it a production hub for the entire continent. It has developed a specialization in a certain style of video feature, popular throughout the region. Nigeria is worthy of the neologism that has been applied to its motion picture industry: Nollywood.

FIGURE 3. CONCENTRATION OF FILM PRODUCTION, 2009



Source: UNESCO Institute for Statistics, January 2012.

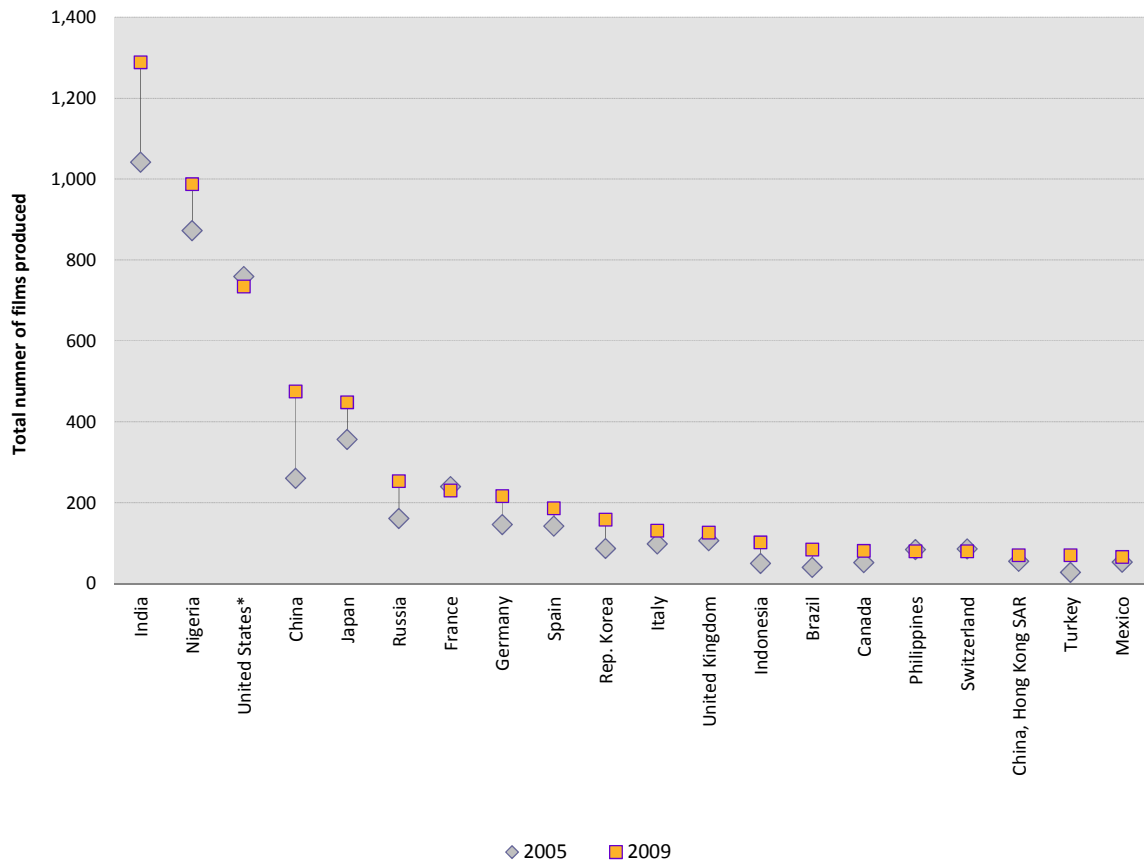
China experienced a sharp increase in production in 2009, nearly doubling its previous output in 2005 (260 films vs. 475 (see **Figure 4**). Likewise, top world producer, India, saw a 24% increase (from 1,041 in 2005 to 1,288 in 2009), and Germany's production grew 48% (from 146 in 2005 to 216 in 2009). In the Russian Federation, production grew 57% (from 161 in 2005 to 253 in 2009).

Other notable rises for countries with lower production volume include Republic of Korea (82% increase from 87 in 2005 to 158 in 2009, Brazil (more than doubling from 40 films in 2005 to 84 in 2009); Indonesia (more than doubling from 50 in 2005 to 102 in 2009); Canada (56% increase from 52 in 2005 to 81 in 2009); Italy (34% increase from 98 in 2005 to 131 in 2009) and Spain (31% increase from 142 in 2005 to 186 in 2009).

France, a country with large production volume, recorded slight decline between 2005 and 2009, from 240 films to 230.

The second-highest level of production was found in Nigeria, where films are produced exclusively in video format. Production grew from 872 films in 2005 to 987 in 2009, though this was a substantial decrease from 2007, the single year in which Nigeria was the world's top producer with 1,559 films.

FIGURE 4. TOP 20 PRODUCERS OF FEATURE FILMS, 2005-2009



* Data for the United States are for 2008-2009.

Source: UNESCO Institute for Statistics, January 2012.

The production figures do not shed light on how many films secured theatrical distribution. However, with changing patterns of cinema attendance, it can be assumed that more films are taking advantage of other distribution platforms (e.g. broadcast television, cable television, and straight-to-DVD releases). The relatively robust production sector points to a decoupling of feature film from theatrical screening environments and highlights the importance of taking account of forms of exhibition and cultural consumption beyond the traditional multiplex and mainstream commercial movie theatres.

Measuring production activity based on the number of feature films completed has the consequence of favouring larger countries. For this reason, it is instructive to look at a per capita list of the top producers (see **Table 4**), revealing that smaller countries are active contributors to world feature film. Iceland, for example, had the highest per capita rate of production between 2007 and 2009. Nigeria, one of the world's top producers, also makes this per capita ranking for 2007 and 2008, indicating yet again its extraordinary contribution to the world of cinema.

TABLE 4. TOP 10 FEATURE FILM PRODUCERS PER CAPITA, 2007-2009

	Films per capita (per 1,000,000 inhabitants)	Films produced
2009		
Iceland	38.0	12
Luxembourg	36.2	18
Mauritius	14.7	19
Malta	12.0	5
Guyana	10.6	8
Switzerland	10.5	80
China, Hong Kong SAR	10.0	70
Estonia	8.9	12
Ireland	8.2	36
China, Macao SAR	7.5	4
2008		
Iceland	32.2	10
Luxembourg	26.7	13
Switzerland	11.5	87
Ireland	9.0	39
Guyana	8.0	6
China, Hong Kong SAR	7.7	53
Malta	7.3	3
Estonia	6.7	9
Nigeria	6.4	956
Norway	6.3	30
2007		
Iceland	29.4	9
Luxembourg	16.8	8
Switzerland	11.6	87
Nigeria	10.6	1,559
Estonia	10.4	14
China, Hong Kong SAR	7.3	50
Malta	7.3	3
Guyana	6.7	5
Norway	5.7	27
Uruguay	5.7	19

Source: UNESCO Institute for Statistics, January 2012.

THE PREVALENCE OF CO-PRODUCTIONS

Co-produced films tend to benefit from larger budgets, as producers can access two national financing structures. Co-production treaties typically penetrate at least two national audiences, whether through broadcasting pre-sales, relaxation of quota requirements or prioritization of projects with mutually appealing subject matter. Consequently, a country's higher engagement in internationally co-produced films indicates a higher degree of participation in the transnational movement of feature films. Fewer co-productions suggest that a country's filmed entertainment sector is oriented toward domestic audiences.

The majority of countries have marginal, or unreported, figures for international co-productions, suggesting more localized production and consumption. However, in 2009, most films from European countries were co-produced. Other countries with at least 40% of domestic coproduction include: Columbia, Kyrgyzstan, Lao People's Democratic Republic, Lebanon, Morocco and Niger.

Three countries stand out as exceptions. Among the most visible and active film-producing countries, whose releases have international appeal, are India, Nigeria and the United States. Yet, these countries either did not have information available on co-production activity (India), reported no such films (Nigeria) -likely because its standard, low-budget video productions do not require international financing, or recorded a low level of co-production (9% in the United States).⁸

The fact that all three are powerhouse producers of feature film, with sizeable domestic markets for their films, accounts in part for their independence. The prospects for financial success at home are relatively high, making profits from international markets an added return. Countries with smaller domestic markets for their films require access to multiple audiences through co-productions in order to make their films financially viable.

LANGUAGES OF PRODUCTION

Although data on language are missing for key countries, including Brazil and China, information was collected for 4,856 feature films in 2009. English remained by far the dominant language for film production, used in one-quarter of all films (1,201 films). Yoruba, used in Nigerian productions, was the second most common language in films, (540 films or 11%). This was followed by Spanish (367 films or 8%), French (300 films or 6%), Russian (253 films or 5%), and Hindi (235 films or 5%). These six languages together represent the majority of all films made in 2009 (60%).

Looking only at global Top 20 films, however, English makes up an even greater proportion of the films listed. English, then, is the dominant language of origin for the most visible and available films viewed by most countries.

A fascinating development is the rise of multilingual films. These are largely the product of international co-productions and of the expectation that films will have international appeal. While still a small minority of all films produced, multilingual films made up a relatively consistent 0.9% of productions in 2007, 2008 and 2009 (see **Table 5**). With dubbing and subtitling practices, films have long been able to move between cultural contexts. However, the emergence of multilingual films offers a different approach, namely incorporating the contemporary context of cultural exchange, characterised by cross-border flows of people, commodities and culture, into the story-world of the film.

TABLE 5. MULTILINGUAL FEATURE FILM PRODUCTION, 2007-2009

	2007	2008	2009
Total films reporting language	5,030	4,820	4,856
Total multilingual	43	45	46
% multilingual films	0.9%	0.9%	0.9%
Countries covered	60	64	66

Source: UNESCO Institute for Statistics, January 2012.

⁸ Data on co-productions in the United States do not include films in languages other than English, so it is possible that there is a greater level of co-production activity that is not accounted for.

4. EXHIBITION INFRASTRUCTURE

The conversion to digital projection capabilities⁹ from the previous standards of celluloid projection has been one of the most significant changes in film exhibition technology in recent years. The transformation, however, has been uneven across countries, and rates of conversion to digital screens vary (see *Table 6*).

Higher ticket prices were evident in most territories in 2009 compared to previous years. This inflation is partially attributable to the sizable investment required for the conversion to digital exhibition. Since the survey was conducted, the wave of digital 3D conversions has pushed ticket prices even higher.¹⁰ The digital conversion has been gaining momentum since 1999, with the United States, the United Kingdom, China and Korea leading the way.

The number of digital screens more than doubled between 2007 and 2009. The UIS survey shows that rapid conversions are taking place in approximately 60 countries, with some representation on all continents. Nonetheless, the trend toward digital conversion has been uneven. In 2009, 63% of digital screens were located in just three countries – the United States, China and France.

TABLE 6: WORLD DIGITAL SCREENS, 2007-2009

	2007	2008	2009
World digital screens	6,956	9,456	16,074
Countries covered	58	67	65

Note: Data for 2006 do not include the country with the most screens at the time, the United States, and therefore do not provide a sufficiently accurate portrait for comparison purposes.

Source: UNESCO Institute for Statistics, January 2012.

Survey results for screens per capita show that only a minority of countries have a large number of screens per inhabitant. Indeed, between 2005 and 2009, only 40 to 45 countries had at least two screens per 100,000 people. Among countries with the highest density of screens, only nine reported at least 10 screens per 100,000 people: Australia, Iceland, Ireland, Malta, Norway, Saint Kitts and Nevis, Spain, Sweden, and the United States (see *Table 7*).

The figures for frequency of attendance at movie theatres suggest that seeing a film in a cinema is an event that occurs on average but few times a year, if at all (see *Table 14*). The dearth of screens in most countries, with the exception of the aforementioned nine countries with high screen density, is a reflection of the fact that going to the movies is a special event. In this light, the global Top 20 feature films list captures the sorts of films deemed most appropriate to the relative rarity of movie-watching in the theatrical environment.

The lack of screens combined with infrequent attendance belies the expansion in the number of films produced, as has been noted above. Taken together, these figures illustrate the split between feature film production and film consumption in theatres. The public screening environment is increasingly a special venue separate from other occasions and situations in which most feature films are viewed.

⁹ Digital projectors included in the UIS survey require a minimum standard of 1.3K resolution, where the imaging device is 1,280 pixels wide by either 720 or 1,024 pixels high.

¹⁰ Paul MacDonald and Janet Wasko, eds., *The Contemporary Hollywood Industry*, Oxford: Blackwell Publishing, 2008.

TABLE 7. COUNTRIES WITH AT LEAST 10 SCREENS PER CAPITA (100,000 INHABITANTS), POPULATION AGED 5 TO 79 YEARS, 2005-2009

At least 10 screens per capita (100,000 inhabitants), aged 5 to 79 years			
2005		2007	
Iceland	16.9	Iceland	15.7
United States	14.3	United States	14.9
Sweden	12.0	Sweden	11.5
Spain	11.2	Ireland	11.1
Malta	11.1	Malta	11.0
Norway	10.5	Spain	10.7
Ireland	10.3	Australia	10.2
2006		2008	
Iceland	17.0	Saint Kitts and Nevis	15.3
United States	14.3	United States	14.8
Sweden	12.0	Iceland	14.8
Ireland	10.9	Ireland	11.2
Spain	10.8	Malta	11.0
Malta	10.8	Sweden	10.4
Norway	10.3	Australia	10.2
		Spain	10.2
		2009	
		Saint Kitts and Nevis	15.1
		United States	14.5
		Iceland	14.2
		Ireland	11.2
		Malta	11.0
		Sweden	10.3
		Australia	10.1

Source: UNESCO Institute for Statistics, January 2012.

MULTIPLEX THEATRES REMAIN LIMITED

Since the early 1990s, there has been a lot of discussion about the spread of multiplex theatres (8 screens or more) and multiscreen theatres (2 to 7 screens) – a predominantly American phenomenon – to other countries.¹¹ However, survey results indicate that two decades later circuits of multiplex theatres are well developed in a relatively small number of countries. As shown in **Tables 8** and **9**, the United States, where the first multiplexes were established, continues to have the highest number.

Between 2006 and 2009 (see *Table 8*), the number of theatres with 2 to 7 screens was three times higher in the United States than in Germany, the country with the next highest number (a four-year average of 2,229 versus 744). Over the same period, the following countries reported more than 100 multi-screen theatres: France, Italy, Spain, Brazil, the United Kingdom, Venezuela, Mexico, Turkey, the Netherlands, the Philippines, and Australia.

¹¹ Charles R. Acland, *Screen Traffic: Movies, Multiplexes, and Global Culture*, Durham, NC: Duke University Press, 2003.

Table 9 shows that the United States also has a high number of multiplexes with eight or more screens, with a four-year average of 2,278 between 2006 and 2009. This is over eight times the next country, Mexico's, four-year average of 280. Over the same period, other countries with more than 100 large multiplexes included: Australia, France, Germany, Italy, Republic of Korea, Spain, the United Kingdom, and Venezuela.

TABLE 8. COUNTRIES WITH MORE THAN 100 MULTI-SCREEN THEATRES (2-7 SCREENS), 2006-2009

	2006	2007	2008	2009	Average
United States	2,362	2,296	2,215	2,043	2,229
Germany	748	756	740	732	744
France	697	689	694	690	693
Italy	404	398	404	403	402
Spain	393	...	...	...	393
Brazil	358	355	372	336	355
United Kingdom	...	265	265	267	266
Venezuela	...	242	233	273	249
Mexico	210	235	222	204	218
Turkey	189	...	...	...	189
Netherlands	119*	129*	129*	133	128
Philippines	124	...	...	...	124
Australia**	...	...	102	100	101

* Partial figures.

** 4-6 screen measure.

Source: UNESCO Institute for Statistics, January 2012.

TABLE 9. COUNTRIES WITH MORE THAN 100 MULTIPLEX THEATRES (8 OR MORE SCREENS), 2006-2009

	2006	2007	2008	2009	Average
United States	2,252	2,233	2,307	2,319	2,278
Mexico	260	253	277	331	280
Republic of Korea		210	223	236	223
United Kingdom	...	205	215	219	213
Spain	180	...	...	...	180
France	152	158	165	170	161
Venezuela	...	140	140	141	140
Germany	134	136	140	138	137
Italy	101	108	113	119	110
Australia*	104	103	104	106	104

* 7+ screens measure.

Source: UNESCO Institute for Statistics, January 2012.

5. FILM CONSUMPTION IN CINEMAS

Indicators for screens per capita, numbers of screens, multiplexes, average attendance frequency, and average ticket prices all record differing national ranges of intensity of participation in the public consumption of feature films. It must be kept in mind, however, that given the multiple forms of engagement with film, the standard definition of film consumption as viewing films in cinemas offers no definitive measure of the contribution of a country to the diversity of cultural expression worldwide. Though the Top 10 film rankings from reporting countries show a variety of film titles that are domestically popular in cinemas, the high end of the global Top 20 rankings suggest that cinemas have become, by and large, places where people go to view international hits.

World average ticket prices show a steady increase from US\$4.85 per admission in 2005 to US\$6.44 in 2009 (see **Table 10**). Countries that rank consistently and significantly above the average are those with higher costs of living. They also tend to have higher attendance frequencies (e.g. most European countries, Japan and Australia). The fact that ticket prices, in general, have been rising while there is a low level of cinema attendance points to the specialness of cinema-going.

TABLE 10. WORLD AVERAGE TICKET PRICES, IN CURRENT USD 2005-2009

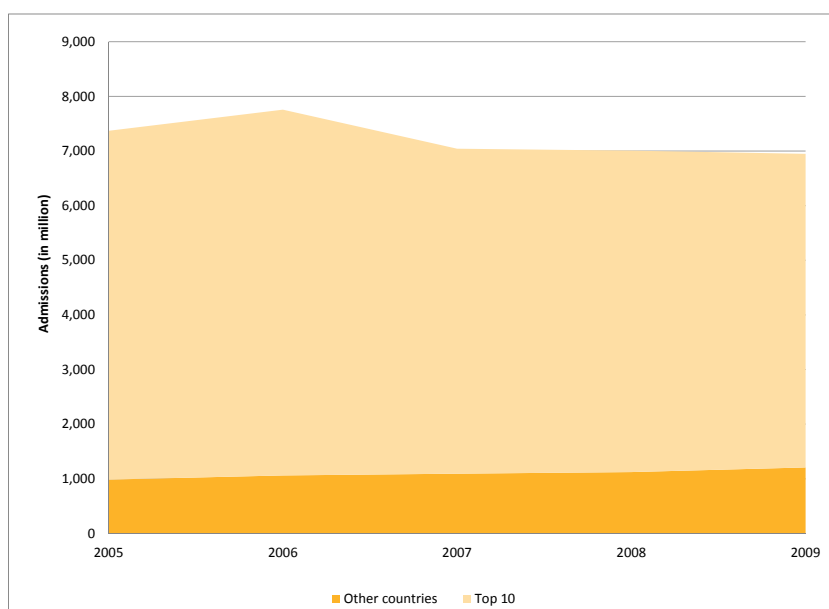
	2005	2006	2007	2008	2009
Average ticket price	4.85	5.18	6.16	6.39	6.44
Countries covered	54	55	58	63	59

Source: UNESCO Institute for Statistics, January 2012.

Though some variation is attributable to the lack of data from some countries, data on world admissions show a decrease of 5.7% between 2005 and 2009, representing a yearly average decrease of -1.3% (see **Figure 5, Tables 11 and 12**). In India, which has the largest share of world admissions, figures dropped by 22.6% over the same period. Spain experienced a 13.8% drop.

In contrast, other countries with the highest rates of admissions saw modest increases. China experienced a steady increase of 67.8% during the same period, which correlates to the growth in its number of theatres (see **Table 13**). Proportionally, the ten countries with the highest rates of admissions represented about 87% of the world total in 2005 and 83% in 2009. The high level of cinema-going in just two countries -- India and the United States -- together consisted of 70% of total world admissions in 2005, and 62% in 2009.

FIGURE 5. WORLD ADMISSIONS FOR THE TOP 10 COUNTRIES, 2005-2009



Source: UNESCO Institute for Statistics, January 2012.

TABLE 11. TOTAL ADMISSIONS FOR THE TOP 10 COUNTRIES AND PERCENTAGE OF THE WORLD TOTAL, 2005- 2009

Rank	2005		2006		2007		2008		2009	
1	India	3,770,000,000*	India	3,997,000,000*	India	3,290,000,000*	India	3,251,000,000*	India	2,917,000,000*
2	United States	1,403,000,000	United States	1,449,000,000	United States	1,399,316,912	United States	1,341,346,867	United States	1,415,238,501
3	France	175,520,898	France	188,772,263	China	195,800,000	China	209,800,000	China	263,800,000
4	United Kingdom	164,700,000	China	176,200,000	France	178,168,096	France	190,081,537	France	201,142,290
5	Japan	160,452,000	Japan	164,584,000	Mexico	175,000,000	Mexico	182,000,000	Mexico	178,000,000
6	China	157,200,000	United Kingdom	156,560,402	Japan	163,190,000	United Kingdom	164,200,000	United Kingdom	173,500,000
7	Mexico	153,997,284	Mexico	154,283,256	United Kingdom	162,400,000	Japan	160,490,000	Japan	169,300,000
8	Rep. of Korea	145,600,000	Rep. of Korea	153,400,000	Rep. of Korea	158,770,000	Rep. of Korea	150,830,000	Rep. of Korea	156,960,000
9	Spain	127,640,000	Germany	134,613,450	Spain	116,930,692	Russia	118,000,000	Germany	135,600,000
10	Germany	126,234,617	Spain	121,650,000	Germany	111,400,000	Germany	115,100,000	Russia	132,000,000
	World admissions	7,369,925,156		7,757,508,474		7,043,068,559		7,006,527,010		6,948,916,820
	Total for Top 10	6,384,344,799		6,696,063,371		5,950,975,700		5,882,848,404		5,742,540,791
	Share of the Top 10	86.6%		86.3%		84.5%		84.0%		82.6%
	Countries covered	72		73		72		74		72

Note: (*) Estimations from Focus World Film Market Trends, European Audiovisual Observatory 2011.

Source: UNESCO Institute for Statistics, January 2012 and.

TABLE 12. GROWTH RATE OF ADMISSIONS, 2005- 2009

	2005-06	2006-07	2007-08	2008-09	2005-2009	Average
Growth rate of world admissions	5.3%	-9.2%	-0.5%	-0.8%	-5.7%	-1.3%
Growth rate of Top 10	4.9%	-11.1%	-1.1%	-2.4%	-10.1%	-2.4%
Growth rate of world admissions (without India)	4.5%	-0.2%	0.1%	7.4%	12.0%	2.9%
Growth rate of Top 10 (without India)	3.2%	-1.4%	-1.1%	7.4%	8.1%	2.0%

Source: UNESCO Institute for Statistics, January 2012.

TABLE 13. GROWTH RATE OF THE TOP COUNTRIES WITH HIGHEST ADMISSIONS, 2005-2009

	2005-2006	2006-2007	2007-2008	2008-2009	2005-2009	Average 2005-2009
India	6.0%	-17.7%	-1.2%	-10.3%	-22.6%	-5.8%
United States	3.3%	-3.4%	-4.1%	5.5%	0.9%	0.3%
France	7.5%	-5.6%	6.7%	5.8%	14.6%	3.6%
United Kingdom	-4.9%	3.7%	1.1%	5.7%	5.3%	1.4%
Japan	2.6%	-0.8%	-1.7%	5.5%	5.5%	1.4%
China	12.1%	11.1%	7.2%	25.7%	67.8%	14.0%
Mexico	0.2%	13.4%	4.0%	-2.2%	15.6%	3.9%
Rep. of Korea	5.4%	3.5%	-5.0%	4.1%	7.8%	2.0%
Spain	-4.7%	-3.9%	-7.8%	2.0%	-13.8%	-3.6%
Germany	6.6%	-17.2%	3.3%	17.8%	7.4%	2.6%
Russia	9.8%	14.4%	12.4%	11.9%	57.9%	21.3%

Source: UNESCO Institute for Statistics, January 2012.

The per capita cinema-going frequency indicator also reflects how uncommon the activity has become. According to data for 2006 and 2009, countries that together make up the majority of the world's population report a frequency of attending less than one film per year (see **Appendix III**). Countries averaging less than one movie attendance annually include such geographically dispersed area as: Bulgaria, Latvia, Lithuania, Romania, Russian Federation, Turkey, and Ukraine in Europe; China, Indonesia, and Philippines in Asia; Brazil, Chile, Columbia, Cuba, Peru, and Uruguay in the Americas; Morocco and South Africa in Africa.

Between 2006 and 2009, only six countries had a frequency of three or more films per year (see *Table 14*): Australia, France, Iceland, Republic of Korea, Singapore, and the United States. In 2006, the list includes Ireland, India, and Spain..

All these high-attendance countries have vibrant film production sectors and an exhibition sector that has been active in investing in state-of-the-art digital screens. But the small number of countries with this level of frequency tells us how limited the practice of public film consumption in a designated cinema has become.

TABLE 14. FREQUENCY OF ATTENDANCE PER CAPITA FOR THE TOP 10 COUNTRIES (POPULATION AGED 5 TO 79 YEARS), 2006-2009

Rank	2006		2009	
1	Iceland	5.6	Iceland	5.8
2	Ireland*	5.5	United States	5.2
3	United States	5.4	Australia	4.6
4	Australia	4.4	Singapore	4.2
5	India	3.9	France	3.6
6	Singapore	3.8	Republic of Korea	3.5
7	Republic of Korea	3.5	China, Hong Kong SAR	3.2
8	France	3.5	UK	3.2
9	Spain	3.1	Norway	3.0
10	Luxembourg	3.0	Luxembourg	2.9

Note: In 2006, Ireland appeared in the list due to the exceptional success of the Irish movie *The Wind that Shakes the Barley*.

Source: UNESCO Institute for Statistics, January 2012.

The data do not capture internal disparities at the national level. The frequency of cinema-going tends to be higher among wealthy, young and urban populations.¹² But they do demonstrate how generally infrequent cinema attendance is across the world. The statistics also illustrate the unusual cases of both the United States and India, which have large populations and relatively high rates of cinema attendance, and where movie-going practices remain a viable cultural activity.

In 2006, India had total admissions of 3,997 million, which outpaced the United States by a factor of over 2.5. During the same year, admissions in the United States were 1,449 million, 7.7 times higher than in France, with the next highest rate of attendance at 188 million admissions (*see Table 11*). In 2009, the United States and India topped the list of attendance again. India remained the admissions leader in 2009, with 2,917 million, that is, more than double the United States' admissions. The total admissions for the United States (1,415 million) were more than five times those of the next country, China, with 264 million admissions.

In terms of attendance frequency per capita in 2006, the United States ranked among the top countries with 5.4 films per year (*see Table 14*). Iceland showed the highest frequency in both 2006 and 2009. India, with an attendance frequency of 3.9 films per year in 2006 is now in the fifth position. In 2009, the frequency in the United States was 5.2 films per year, and India's attendance frequency was 2.7 films.

After the Top 10 countries, a significant drop in attendance is apparent, due to either low frequency or small population size. Either reason leads to the conclusion that in most countries around the world participation in cinema-going culture is substantially limited. A select few make up the bulk of the activity.

Missing among the high-production countries on the list of frequent cinema-going populations is Nigeria, which did not report any exhibition figures. As noted earlier, consumption there typically does not take place in theatres. In Nigeria, what are conventionally called "alternative screening venues," like video theatres or semi-private communal television sets, are the norm.¹³

For all contexts, the rising particularity of the theatre situation in film culture indicates that television, video, and computer-based (including tablets and smart phones) screening and viewing situations are hardly "alternative" anymore. The mainstays of film practices have become more localized, small-scale, private or semi-private, and in multimedia forms of film consumption.¹⁴ In other words, cinema-going is but one manifestation of participation in film culture, one that is *not* the primary form of cultural engagement with feature film for the majority of the world.

6. CONCLUSION

The highly-visible, big-budget, English-language, franchise feature film represents one strata or tier of popular global film culture -- one that dominates the top half of the Global Top 20 feature films. This top tier is produced and promoted by the largest multi-national corporations; and it represents an international standard for the exclusive and selective environment of the movie theatre.

However, it is inaccurate to assume that this makes up the bulk of world film culture. It may be the most visible and most widely shared, but the statistics show us an active sphere that is more localized, nationally-specific, in diverse languages, and likely enjoyed in venues other than the traditional cinema house.

¹² Toby Miller, Nitin Govil, John McMurria, Richard Maxwell, and Ting Wang, *Global Hollywood 2*, London: BFI Publishing, 2008.

¹³ Brian Larkin, *Signal and Noise: Media, Infrastructure, and Urban Culture in Nigeria*, Durham, NC: Duke University Press, 2008.

¹⁴ Barbara Klinger (2006) *Beyond the Multiplex: Cinema, New Technologies, and the Home*, Berkeley: University of California Press.

In the end, a very small number of countries drive the world feature film industry. The UIS Survey on Feature Film Statistics provides a portrait of contrasts, where a limited number of countries meet conventional expectations of national cinema culture, namely a production sector whose films are consumed by domestic populations in cinemas. We need to acknowledge that the engagements with film culture are much more varied due to the international circulation of film, the shared multi-national popularity of a few titles, the local and national popularity of many other titles, the forms of joint participation in production with internationally co-produced films, and changing patterns of cinema-going amidst other manners of film consumption, most obviously in the domestic or private settings. Therefore, these findings are not a sign of the withering away of film culture, but of the emergence of different strata of film culture.

Appendix I

SURVEY RESPONSES AND COVERAGE, 2010

In August 2010, the UIS sent the biennial UIS Survey on Feature Film Statistics to 208 countries requesting information on domestic feature films for 2007, 2008 and 2009 from primary national agencies that collect the pertinent data, including ministries of culture, national statistics offices and film commissions.

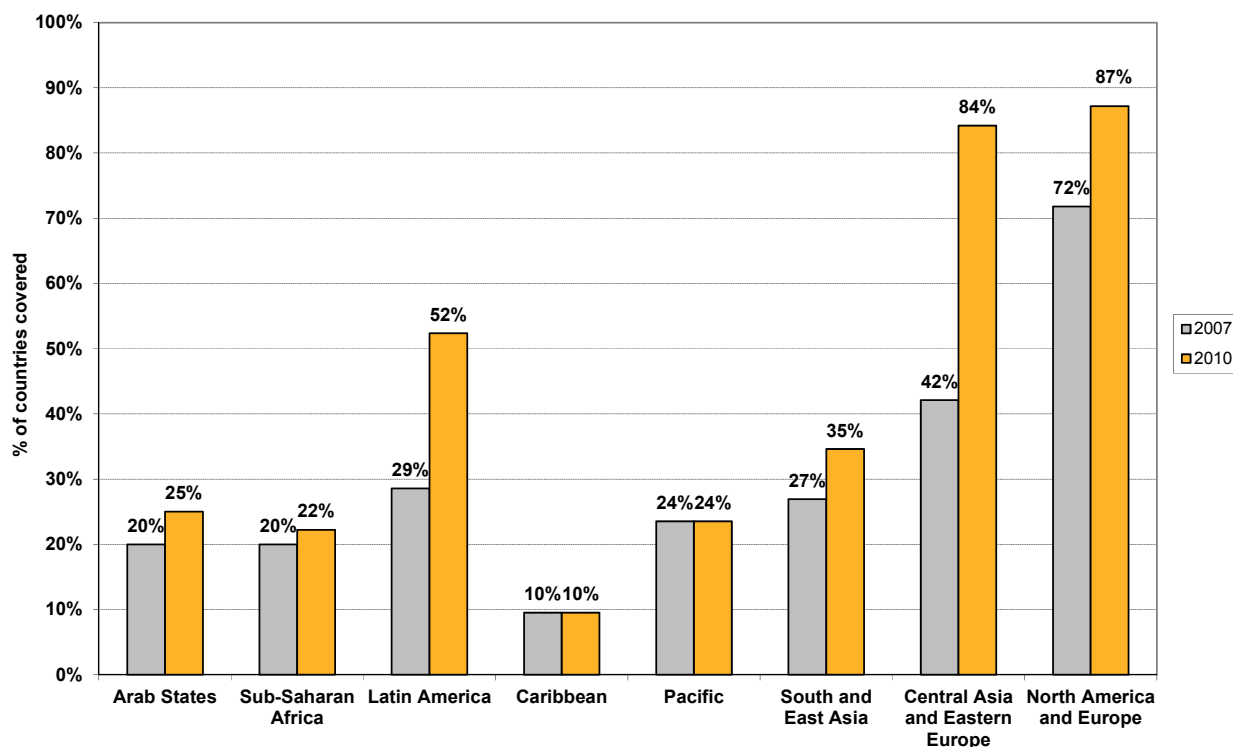
The 2010 questionnaire had a 44% response rate (e.g. 91 countries). This was an increase from the 68 countries that responded to the previous survey in 2007, when the response rate was 33%.

The UIS verifies and supplements completed questionnaires by consulting publically available data online from national and regional institutions (e.g. the European Audiovisual Observatory).

With the addition of UIS data, the overall 2010 survey coverage included 115 countries or 55%. With additional data, the 2007 survey represented 102 countries for a coverage rate of 49%.¹⁵

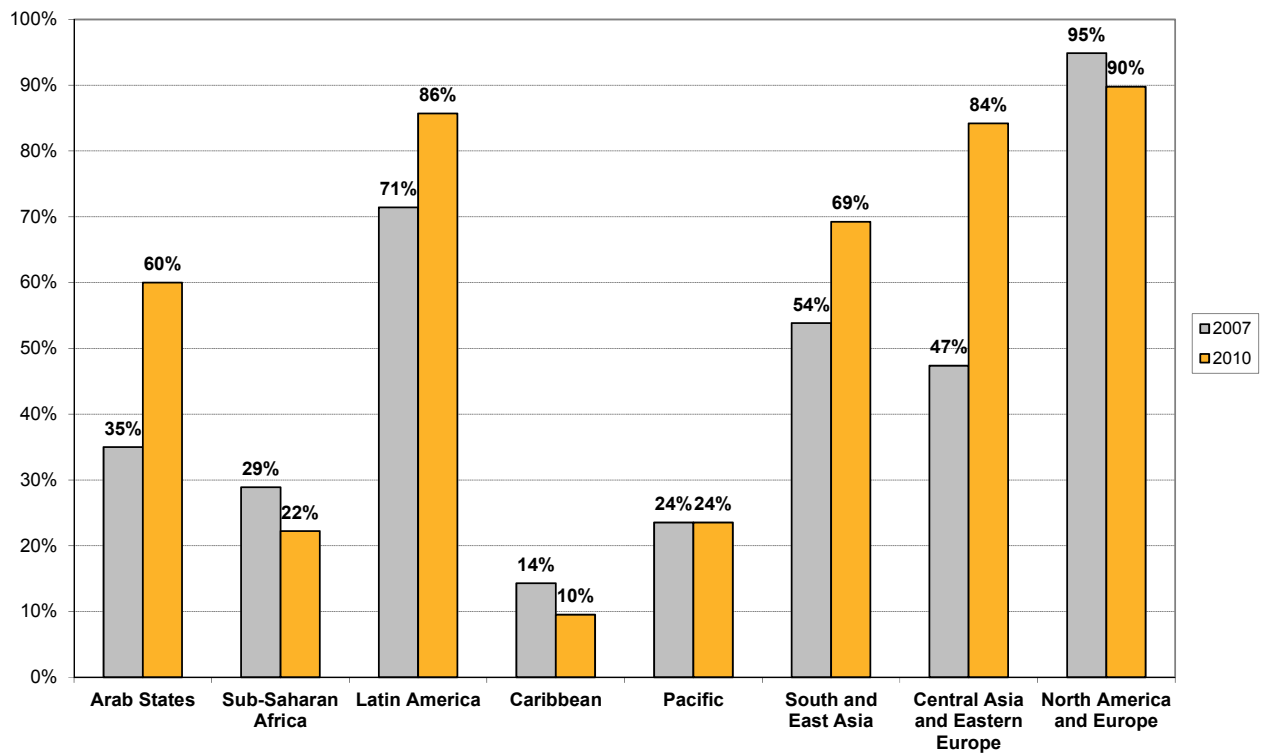
From 2007 to 2010, overall coverage for regions improved, while coverage for the Caribbean and the Pacific regions remained constant at comparatively low rates of 10% and 24%, respectively. In Latin America, coverage dramatically increased from 29% to 52%, as did coverage for Central Asia and Eastern Europe, rising from 42% to 84%.

Response rate for UIS feature film questionnaire by region, 2007-2010



¹⁵ UIS, "Information Sheet No. 2: Analysis of the UIS International Survey on Feature Film Statistics," UNESCO Institute for Statistics, Montreal, 2009.

Total coverage of UIS Cinema Survey, 2007-2010



Appendix II

FEATURE FILMS BY APPEARANCE ON NATIONAL TOP 10 LISTS, 2009

This table presents a compilation of data on the national origin of feature films with the number of appearances on the Top 10 lists of different countries for 2009.

Occurrence	Origin of the film
Title that appears once	127 - Argentina (1), Austria (1), Belgium (2), Brazil (2), China (3), Hong Kong Special Administrative Region of China (2), Costa Rica (2), Czech Republic (4), Denmark (1), Dominican Republic (1), Egypt (8), Finland (2), France (4), Georgia (8), Germany (1), Greece (2), Iran (Islamic Republic of) (10), Italy (3), Japan (5), Morocco (4), Myanmar (5), Netherlands (2), Nigeria (5), Norway (3), Pakistan (10), Poland (3), Republic of Korea (7), Russian Federation (4), Serbia (2), Slovakia (1), Spain (3), Sweden (1), Turkey (5), United Kingdom (2), United States (8)
Title that appears 2 times	13 - Australia (1), China (1), Germany (1), Russian Federation (3), Sweden (1), United States (6)
Title that appears 3 times	10 – Russian Federation (1), Sweden (2), United States (7)
Title that appears 4 times	2 - United States (2)
Title that appears 5 times	2 - United States (2)
Title that appears 6 times	2 - United States (2)
Title that appears 7 times	2 - United States (2)
Title that appears 8 times	2 - United States (2)
More than 10 times	11 - United States (9), United Kingdom (2)

Note: Complete Top 10 tables with film titles are available in the UIS Data Centre:

<http://stats.uis.unesco.org/unesco/ReportFolders/ReportFolders.aspx>

Source: *UNESCO Institute for Statistics, January 2012.*

Appendix III

FREQUENCY OF ATTENDANCE PER CAPITA

2009	Countries
More than 3 times/year (8)	<p>Asia: Hong Kong Special Administrative Region of China, Republic of Korea, Singapore</p> <p>Europe and North America: France, Iceland, United Kingdom, United States</p> <p>Pacific: Australia</p>
Less than 3 times/year but more than 1 time/year (30)	<p>Arab States: Lebanon, United Arab Emirates</p> <p>Asia: India, Japan, Malaysia</p> <p>Europe and North America: Austria, Belarus, Belgium, Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Italy, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Sweden, Switzerland, Russian Federation, Israel</p> <p>Latin America and the Caribbean: Mexico, Venezuela</p>
Less than 1 time/year (32)	<p>Sub-Saharan Africa: Niger, South Africa</p> <p>Arab States: Morocco</p> <p>Asia: Azerbaijan, China, Indonesia, Iran (Islamic Republic of), Kazakhstan, Kyrgyzstan, Philippines, Thailand</p> <p>Europe: Bulgaria, Croatia, Cyprus, Georgia, Latvia, Lithuania, Former Yugoslav Republic of Macedonia, Serbia, Slovakia, Ukraine, Republic of Moldova, Romania, Turkey</p> <p>Latin America and the Caribbean: Argentina, Brazil, Bolivia, Chile, Colombia, Cuba, Peru, Uruguay</p>
2006	Countries
More than 3 times/year (9)	<p>Asia: India, Republic of Korea, Singapore</p> <p>Europe and North America: France, Iceland, Ireland, United States</p> <p>Pacific: Australia</p>
Less than 3 times/year but more than 1 time/year (30)	<p>Arab States: Lebanon, United Arab Emirates</p> <p>Asia: Hong Kong Special Administrative Region of China, Japan, Macao Special Administrative Region of China, Malaysia</p> <p>Europe: Austria, Belarus, Belgium, Czech Republic, Denmark, Estonia, Finland, Germany, Greece, Hungary, Israel, Italy, Luxembourg, Malta, Netherlands, Norway, Portugal, Slovenia, Sweden, Switzerland, United Kingdom</p> <p>Latin America and the Caribbean: Argentina, Costa Rica, Mexico</p>
Less than 1 time/year (33)	<p>Sub-Saharan Africa: Mozambique, South Africa</p> <p>Arab States: Algeria, Egypt, Morocco</p> <p>Asia: Azerbaijan, China, Indonesia, Kyrgyzstan, Lao People's Democratic Republic, Palestine, Philippines, Thailand</p> <p>Europe: Bulgaria, Croatia, Cyprus, Latvia, Lithuania, Former Yugoslav Republic of Macedonia, Slovakia, Poland, Romania, Republic of Moldova, Russian Federation, Ukraine, Turkey</p> <p>Latin America and the Caribbean: Brazil, Chile, Colombia, Cuba, Peru, Venezuela, Uruguay</p>

Note: Detailed frequency tables are available in the UIS Data Centre:
<http://stats.uis.unesco.org/unesco/ReportFolders/ReportFolders.asp>
 Source: UNESCO Institute for Statistics, January 2012.

Please consult the UIS website at www.uis.unesco.org to access the UIS Data Centre and subscribe to eAlerts on the Institute's latest publications and data releases.