**Introduction**

Britain’s historic decision to leave the European Union (EU) in the referendum on 23 June 2016 took many political commentators, pollsters and members of the public by surprise. Yet if we see engagement with European film as a broader indicator of pro-European sentiment, then perhaps the result is less surprising.[[1]](#endnote-1) According to UK Film Council (UKFC)/British Film Institute (BFI) *Statistical Yearbooks* (2003-14), European films averaged 17.4% of UK cinema releases in the period 2002-14, but grossed only 1.8% of the box office (figure 1) – the lowest market share in the EU28 (MEDIA Salles 2012). Excluding English-language films, the proportion falls to just 1.1% – or about 1.8 million admissions per year. That is about half what *Skyfall* (Mendes, UK/USA, 2012), the UK’s top box office release of 2012, took solely in its opening weekend (BFI 2013, 24).

[Figure 1 here]

The pattern is much the same outside the theatrical market. A European Commission (2014) survey, for example, found that only 5% of Britons frequently watched European films on any media platform, compared with the EU average of 14%.

Nevertheless, a handful of European titles do breakout in the UK each year. Between 2007 and 2013, there were 34 European films which took £1 million or more (about 200,000 admissions) at the UK box office – the industry’s benchmark for a breakout specialist title (table 1). Nearly half were foreign-language films, including *The Lives of Others* (von Donnersmarck, Germany, 2006), *La Vie En Rose* (Dahan, France/Czech Republic/UK, 2007), *The Girl with the Dragon Tattoo* (Oplev, Sweden/Denmark/Germany, 2009), and *Broken Embraces* (Almodóvar, Spain, 2009). European TV drama series have also been growing in popularity in the UK in recent years. Scandinavian crime series such as *The Killing* and *The Bridge* have become regular fixtures on BBC Four’s Saturday night schedule, frequently pulling in over 1 million viewers. Channel 4 broadcast its first foreign-language drama series in over 20 years when it premiered the French supernatural thriller *The Returned* to an audience of 1.9 million in June 2013, and in January 2016 it broadcast the German spy drama *Deutschland 83* to over 2 million, a record for a foreign-language television series. Even the pay-TV satellite station Sky is getting in on the action with *The Tunnel*, an Anglo-French remake of *The Bridge*, and the Danish family drama, *The Legacy*.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Film | Year | Lang. | Country | Genre (IMDb) | Directors | UK distributor | UK admissions |
| 1 | Taken 2 | 2012 | EN | FR | Action / Crime / Thriller | Olivier Megaton | 20TH CENT. FOX | 3,692,417 |
| 2 | The Impossible | 2013 | EN | ES | Drama / Thriller | Juan Antonio Bayona | eONE | 2,037,493 |
| 3 | The Artist | 2011 | EN | FR / BE | Comedy / Drama / Romance | Michel Hazanavicius | ENTERTAINMENT | 1,542,798 |
| 4 | Taken | 2008 | EN | FR / US / GB | Action / Crime / Thriller | Pierre Morel | 20TH CENT. FOX | 1,232,830 |
| 5 | Arthur and the Invisibles | 2007 | FR | FR | Animation / Adventure / Family | Luc Besson | MOMENTUM | 1,090,792 |
| 6 | Planet 51 | 2009 | EN | ES / GB | Animation / Comedy / Animation | Javier Abad / Jorge Blanco | ENTERTAINMENT | 916,506 |
| 7 | Resident Evil: Afterlife | 2010 | EN | DE / FR / GB | Action / Adventure / Horror | Paul W.S. Anderson | SONY PICTURES | 815,955 |
| 8 | Hitman | 2007 | EN | FR / US | Action / Crime / Drama | Xavier Gens | 20TH CENT. FOX | 726,674 |
| 9 | The Ghost Writer | 2010 | EN | FR / DE / GB | Mystery / Thriller | Roman Polanski | STUDIOCANAL | 699,720 |
| 10 | The Three Musketeers | 2011 | EN | DE / GB / FR | Action / Adventure / Romance | Paul W.S. Anderson | eONE | 573,764 |
| 11 | A Monster in Paris | 2012 | FR | FR | Animation / Adventure / Comedy | Bibo Bergeron | eONE | 534,717 |
| 12 | The Lives of Others | 2007 | DE | DE | Drama / Thriller | Florian Henckel von Donnersmarck | LIONSGATE | 534,610 |
| 13 | Transporter 3 | 2008 | EN | FR / GB | Action / Adventure / Crime | Olivier Megaton | ICON | 496,334 |
| 14 | Justin and the Knights of Valour | 2013 | EN | ES | Animation / Adventure / Family | Manuel Sicilia | eONE | 495,054 |
| 15 | Coco Before Chanel | 2009 | FR | FR | Biography / Drama | Anne Fontaine | OPTIMUM | 482,884 |
| 16 | Animals United | 2010 | DE | DE | Animation / Comedy / Animation | Reinhard Klooss / Holger Tappe | ENTERTAINMENT | 447,765 |
| 17 | Sammy's Adventures: A Turtles Tale | 2011 | NL | BE / US | Animation / Adventure / Family | Ben Stassen | STUDIOCANAL | 388,076 |
| 18 | The Girl with the Dragon Tattoo | 2010 | SV | SE / DK / DE | Mystery / Thriller | Niels Arden Oplev | SONY PICTURES | 367,459 |
| 19 | The Orphanage | 2008 | ES | ES | Drama / Mystery / Thriller | Juan Antonio Bayona | OPTIMUM | 341,453 |
| 20 | La Vie En Rose | 2007 | FR | FR / CZ / GB | Biography / Drama / Music | Olivier Dahan | ICON | 335,568 |
| 21 | The Intouchables | 2012 | FR | FR | Biography / Comedy / Drama | Olivier Nakache / Eric Toledano | ENTERTAINMENT | 319,556 |
| 22 | From Paris with Love | 2010 | EN | FR | Action / Crime / Thriller | Pierre Morel | WARNER BROS. | 309,557 |
| 23 | Resident Evil: Retribution | 2012 | EN | DE / CA / US | Action / Horror | Paul W.S. Anderson | SONY PICTURES | 292,751 |
| 24 | Silent Hill: Revelation 3D | 2012 | EN | FR / US | Horror / Mystery / Thriller | Michael J. Bassett | LIONSGATE | 290,295 |
| 25 | The Girl who Played with Fire | 2010 | SV | SE / DK / DE | Crime / Drama / Mystery | Daniel Alfredson | MOMENTUM | 279,038 |
| 26 | Sammy's Adventures 2 | 2013 | EN | BE / FR / IT | Animation / Adventure / Family | Vincent Kesteloot, Ben Stassen | WARNER BROS. | 270,833 |
| 27 | Cloud Atlas | 2013 | EN | DE / US | Drama / Sci-fi | Tom Tykwer, Andy Wachowski | WARNER BROS. | 256,746 |
| 28 | Broken Embraces | 2009 | ES | ES | Drama / Romance / Thriller | Pedro Almodóvar | PATHE | 250,642 |
| 29 | The Skin I Live In | 2011 | ES | ES | Drama / Horror / Thriller | Pedro Almodóvar | PATHE | 248,487 |
| 30 | I've Love You So Long | 2008 | FR | FR / DE | Drama | Philippe Claudel | LIONSGATE | 236,025 |
| 31 | Tell No One | 2007 | FR | FR | Crime / Drama / Mystery | Guillaume Canet | REVOLVER | 235,720 |
| 32 | Babylon A.D. | 2008 | EN | FR / US | Action / Adventure / Sci-Fi | Mathieu Kassovitz | 20TH CENT. FOX | 226,316 |
| 33 | Head Hunters | 2012 | NO | NO / DE | Crime / Thriller | Morten Tyldum | MOMENTUM | 225,837 |
| 34 | Let The Right One In | 2009 | SV | SE | Drama / Horror | Tomas Alfredson | MOMENTUM | 205,252 |

Table 1. ‘Breakout’ European films with 200,000 admissions or more at the UK box office, 2007-2013. Sources: BFI / LUMIERE / IMDb.

This article examines two key questions: (1) why is the UK market for European film so small; and (2) how do certain European films achieve ‘breakout’ success? To answer these questions, I examine the production, content, distribution and reception of European films in the UK. I draw in particular on the statistical analysis of box office and audience survey data acquired from such bodies as the BFI and the European Audiovisual Observatory (EAO). This quantitative approach allows me to identify broad patterns, trends and variations within the UK cinema industry, which studies focusing on the reception of specific European titles may overlook. To help understand these industry trends, I have also conducted in-depth interviews with UK distributors, exhibitors and policymakers who specialise in European film.[[2]](#endnote-2)

In a broader context, this article also contributes to academic and policy debates about the factors which affect the transnational circulation of film and other media products. One of the key questions for film and media scholars is why some films travel across national borders better than others. Is it primarily due to the cultural content of the films themselves (e.g. the language, story or characters)? Or is it because of the industrial structures which support their production, distribution and exhibition? This also feeds into the concerns of policymakers and industry professionals who are keen to increase the cross-border circulation of films, in order to access new markets and increase the diversity of content available to audiences. The European Union’s MEDIA programme, for example, aims to boost the circulation and viewership of European films in order to strengthen the European audiovisual sector in the face of US competition as well as improve intercultural dialogue between European citizens. This paper provides potentially useful insights into how these measures could be more effectively implemented. Although feature films are the focus of this paper, my findings clearly have implications for European television drama and other media products.

**Why the UK market for European film is so small**

One influential theory explaining why the UK market for European film is so small is Hoskins and Mirus’s (1988) notion of ‘cultural discount’. This is the idea that media products rooted in one culture ‘will have a diminished appeal elsewhere as viewers find it difficult to identify with the style, values, beliefs, institutions, and behavioural patterns of the material in question’ (Hoskins and Mirus 1988, 500). Thus a film from the US is more likely to perform better in the UK than one from, say, China or Japan, because of the closer cultural proximity between Britain and America in terms of language, customs and traditions. Hoskins and Mirus add that where two countries face the same level of cultural discount, the one with the largest domestic market will dominate international trade – a phenomenon known as the ‘home market effect’. This is because countries with a large home market receive more domestic revenue to invest in the elements (e.g. stars, special effects and marketing materials) which make media products appealing to audiences worldwide.

While research on the market for European films in the UK remains limited, there is significant empirical evidence to support the ‘cultural discount’ thesis in other geographical contexts. Lee (2006, 2008), for example, shows that US action and sci-fi movies tend to perform better in the Asian market than more culturally-specific genres like comedies. Similarly, Lee and Waterman (2007) suggest the reason why the US has increased its share of global film trade since the 1950s is because its domestic film market has grown at a faster rate than the UK, France, Germany, Italy or Japan.

However, the notion of ‘cultural discount’ has also attracted critics. From a ‘critical political-economic’ perspective, Miller et al. (2005, 4), for example, suggest that Hoskins and Mirus’s ‘neoclassical economic conservativism’ ignores the role of the US government in terms of regulating the global film trade in Hollywood’s favour and also helping to facilitate the emergence and dominance of powerful multimedia conglomerates.

It is beyond the scope of this article to evaluate the ‘neoclassical’ and ‘critical political-economic’ perspectives in detail. Nevertheless, as Lee (2008, 120) points out, ‘both can be regarded as offering useful insights and conceptual tools for empirical analysis’. Thus, while the notion of ‘cultural discount’ provides a useful starting point for understanding why the UK market for European film is so small, it is also important to consider the wider political-economic context in which European films are produced, distributed and consumed, including ‘how state policies combine with business strategies to shape the parameters for and characters of the transnational flow of media products’ (Lee 2008, 120).

***Language, cultural content and aesthetic style***

The majority of European films face a high cultural discount in the UK market as three-quarters are non-English language productions. These ‘foreign-language films’ are generally shown with English subtitles (unlike in France, Italy, Spain or Germany, where foreign-language films are generally dubbed). At the same time, the fact that Britain shares a common language with the US, not to mention a long history of engagement with American popular culture going back to the early twentieth century (see Higson and Matlby 2000), means that US films are more easily accepted by British audiences, which partly explains why even ‘specialised’ US films generally outperform their European counterparts.[[3]](#endnote-3)

Audience research confirms that foreign-language films have less appeal in the UK than English-language productions. A BFI (2011) survey, for example, found while almost half of Britons had seen a foreign-language title in the last 12 months, only 14.1% liked this type of film – one of the least popular genres selected (figure 2). Moreover, just 2.3% said they watched foreign-language films ‘most often’. While the BFI survey did not explore why the majority of Britons dislike foreign-language films, it seems likely that many are put off by subtitles, which can be difficult to follow, do not always convey the full-meaning of the story, and require considerable concentration (Kilborn 1993; Mera 1999; Pelletier 2012). Children and pensioners or those with poor eye-sight or low literacy skills can find it especially hard to watch subtitled films (which is why foreign-language family films and animations are normally dubbed for the UK market).

[figure 2 near here]

Language is not the only reason why European films suffer a heavy cultural discount in the UK. Their cultural content and aesthetic style can also diminish their appeal. Most European films feature actors, characters, settings and subject matter which British audiences are largely unfamiliar with. Many also conform to an ‘art-house’ style – which tend to be more ambiguous than mainstream Hollywood movies in terms of their characters and narratives, placing a greater emphasis instead on intellectual ideas and artistic expression (Bordwell 1979).

[expand this section on the ‘art-house style’ with reference to Galt and Schoonover (2010) , Andrews (2013),

A European Commission (2014, 162) survey suggests that Britons do typically see European films as ‘different-quirky’ and ‘creative-innovative-original’, with the capacity to ‘show a new culture’. More than three-quarters agreed that European films ‘feature diverse and complex characters’, ‘are original and thought-provoking’ and ‘have visual and artistic qualities’, while less than half thought they ‘feel close to my reality’ or ‘feature clear plots’. But while these qualities may ensure European films enjoy greater critical success than their Hollywood counterparts, they can also limit their audience appeal. The aforementioned BFI survey found the films British audiences watched ‘most often’ were ‘blockbusters with big-budget special effects and a star cast’ (49.4%), followed by ‘films without special effects, but with famous cast members’ (17.8%). Only 13.6% said they liked art-house films, while none watched these types of film ‘most often’ (figure 2).

It is worth noting that those Britons who do enjoy foreign language or art house films conform to a particular demographic profile (table 2). Analysis of the BFI survey data reveals that a higher proportion than average are university graduates, aged 25-55, earning over £30,000 per year and city-dwellers, with significantly more living in London than any other part of the UK.[[4]](#endnote-4) They tend to be heavier film consumers than the population as a whole, as well as more culturally-engaged: 40.9% of foreign-language film fans said they visited the cinema at least once a month (compared with 29.0% of the population), while 37.6% (compared with 21.2% of the population) had visited a museum, art gallery, concert or theatre performance. Tellingly, foreign language film fans were significantly more likely than the population as a whole to say they were ‘very interested’ in ‘different languages’ (28.2% compared with 10.2%) and ‘knowing/finding out about different groups around the world’ (42.5% compared with 23.6%). In other words, those most likely to engage with European film – particularly foreign-language European art house cinema – generally possess higher levels of education and cultural capital than the UK population as a whole and also possess a more cosmopolitan outlook. It is interesting to note that European film fans share a similar demographic profile to those who, according to pollsters (e.g. Ashcroft 2016), voted for Britain to remain in the EU during the recent referendum.

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | Foreign-language | Art-house |
| Overall average |  | 14.1% | 13.6% |
| Education | No qualification | 5.0% | 4.3% |
| GCSE (or equivalent vocational) | 8.0% | 7.6% |
| A Levels (or equivalent vocational) | 11.5% | 10.3% |
| Degree or above | 22.0%\* | 21.7%\* |
| Age | 15-24 | 12.6% | 10.1% |
| 25-34 | 19.5%\* | 14.7% |
| 35-54 | 14.9% | 16.3%\* |
| 55+ | 10.9% | 11.6% |
| Place of residency | A city | 24.5%\* | 23.2%\* |
| A suburb of a city | 13.6% | 13.4% |
| A town | 12.1% | 11.5% |
| A village or rural area | 8.5% | 8.6% |
| Region | North | 7.5% | 11.6% |
| North West | 13.7% | 12.9% |
| Yorkshire & Humberside | 13.5% | 14.0% |
| West Midlands | 8.0% | 10.3% |
| East Midlands | 8.7% | 9.0% |
| East Anglia | 9.8% | 11.6% |
| South West | 14.5% | 12.6% |
| South East | 15.1% | 12.4% |
| Greater London | 23.1%\* | 21.5%\* |
| Wales | 9.2% | 10.9% |
| Scotland | 17.6% | 16.3% |
| N. Ireland | 18.1% | 16.4% |
| Gender | Male | 14.4% | 14.1% |
| Female | 13.9% | 13.2% |
| Income | Under £30,000 | 13.7% | 12.2% |
| £30,000 or more | 16.4%\* | 16.7%\* |
| Ethnicity | White | 13.7% | 13.7% |
| Other | 21.0% | 11.5% |

Table 2. Demographic profile for British film viewers who like ‘foreign-language’ and ‘art-house’ films. (\*indicates significant differences from the mean at the p=0.05 level). Source: BFI 2011.

***Political-economic context***

While the notion of ‘cultural discount’ goes a long way to explaining why the UK market for European film is so small, it is also important (as noted above) to take account of the wider political-economic context within which European films are produced, distributed and consumed. According to Henning and Alpar (2005), the European film industry faces two principal problems: high fragmentation of the production sector, and weak distributors and low level of vertical integration. These lead to small production sizes and budget restraints, resulting in weak marketing efforts and shortfalls in development. Consequently, Europe produces lots of low budget films that lack both the production values (in terms of stars or special effects) and the marketing and distribution clout to compete with Hollywood productions.

These structural weaknesses affect many of the European films released in the UK. The average French or German film, for example, has a budget of around $5 million, compared with £139 million for a major Hollywood production (Mueller 2011). According to data from the EAO’s LUMIERE database, almost three-quarters (73.2%) of European films released in the UK between 2007 and 2012 were handled by small, specialist independent distributors (which control only 5% of the UK box office), such as Curzon Artificial Eye, New Wave and Soda Pictures. UKFC/BFI *Statistical Yearbooks* (2003-2014) suggest that foreign-language European films reach about 14 theatres at their widest point of release, compared with about 168 for the average English language production. Meanwhile, only 7% of UK cinema screens are devoted to ‘specialised’ films (which includes foreign-language films), with most concentrated in London or other major cities (BFI 2014, 112).

Efforts have been made to overcome these structural problems. According to the MEDIA Desk UK’s (2008-14) annual reports, the EU’s MEDIA programme awarded €8.6 million to UK distributors between 2007 and 2013 to support the distribution of 219 European films, plus an additional €5.2 million to the Europa Cinema Network, a chain of 50 or more UK cinemas which specialise in European film. In the same period, the UKFC (and subsequently the BFI) awarded UK distributors £5.6 million (€6.8 million) to support the release of 111 European titles through its Prints and Advertising (P&A) Fund (see UKFC/BFI *Annual Reports* 2008-14). In 2005, the UKFC created the Digital Screen Network (DSN), a chain of cinemas which, in return for a £50,000 high definition digital projector, agreed to show more British independent films and specialist titles (BFI 2015). By 2009, this £11.7 million scheme covered one-in-four UK cinemas, boosting the number of specialist screenings by 165,000. However, these interventions have made a little impact on box office performance. While admissions for European films grew in the UK by 70.0% during the period 2007 to 2013, from 2.9 million to 5.0 million, much of this growth can be attributed to English-language productions – which accounted for about 80.0% of total European film admissions in 2013 (figure 3). Most of these admissions came from just one or two titles per year. For example, the French-made Hollywood-style action blockbuster *Taken* (Morel, France/US/UK, 2008) accounted for 33% of the total admissions for European films in 2008, while the sequel *Taken 2* (Megaton, France, 2012) took a 45% share in 2012. Neither film received any support from either MEDIA or the BFI. At the same time, total admissions for foreign-language European films – half of which did receive MEDIA distribution support – fell by 46.8% from 1.9 million in 2007 to 1.0 million in 2013.

[figure 3 near here]

***Explaining the decline of foreign-language European films***

Interviews with industry professionals and analyse of the industry press point to four more specific reasons which may explain why the market for foreign-language European films has declined in recent years. Firstly, in comparison with the early part of the millennium, multiplex cinemas are showing fewer specialist films. In 1999, the French cinema chain UGC entered the UK exhibition market with the acquisition of 34 multiplexes from the Virgin Cinema Group (Buckingham 1999). Two years later, it launched its own UK distribution label, UGC Films UK, dedicated to European titles from UGC’s own sales roster and third-party pick-ups (Romney 2001). Building on the unprecedented success of foreign-language titles like *Amélie* (Jeunet, France/Germany, 2001) and *Crouching Tiger Hidden Dragon* (Lee, Taiwan/China/Hong Kong/USA 2000), the new label achieved early breakout successes with *Good Bye Lenin!* (Becker, Germany 2003), *Swimming Pool* (Ozon, France/UK 2003) and *8 Femmes* (Ozon, France 2002). This was partly helped by UGC’s new loyalty card, which, by allowing unlimited entry to UGC cinemas for a standard monthly fee, encouraged audiences ‘to take a risk’ and ‘see things they hadn’t seen before’, including foreign-language films.[[5]](#endnote-5) Other multiplexes also began showing foreign-language European films after signing up to the UK Film Council’s DSN scheme (see above). However, after UGC Film was closed down following Cineworld’s takeover of the UGC cinema chain in 2005, and the DSN scheme ended with the closure of the UKFC in 2010, most multiplexes reverted to a more mainstream programme.

Secondly, just as multiplex cinemas are showing fewer specialist films than the early part of the millennium, specialist cinemas are showing more mainstream Hollywood films. As one distributor put it ‘You get cinemas which a few years ago would show a solid arthouse/independent programme [that] are suddenly showing *The Hobbit*’[[6]](#endnote-6). According to Evans (2011), this trend has come about as many older, middle-class cinema-goers prefer to watch Hollywood blockbusters in an environment where they are surrounded by people with similar tastes, values and social backgrounds, rather than out-of-town multiplex cinemas, which are perceived as being ‘down-market’ and orientated towards ‘unruly’ teenagers.

Mainstream programmes have become particularly common within the so-called ‘art-house chains’ (i.e. Picturehouse, Curzon and Everyman), which have expanded significantly in the last few years in order to cater for more ‘upmarket’ cinemagoers. In 2012, for example, Picturehouse’s 21 cinemas were bought by Cineworld, the UK’s second biggest cinema chain, in a deal worth £47.3 million (Kollewe 2012). Although Cineworld pledged to run Picturehouse as a separate entity, the move raised concerns that the change of ownership would lead to more mainstream Hollywood fare being programmed. As one distributor explained, this has certainly proved to be the case with Picturehouse York:

Before the Picturehouse opened there used to a cinema called York City Screen, which used to be in the museum. It was single-screen, 200 seats, and it showed every foreign language film on release …. Now the model is – even though they have more screens – they are showing more popular movies for more screenings.[[7]](#endnote-7)

Picturehouse has continued to champion specialised films, particularly through its ‘Discover Tuesday’ programme. However, a 2013 enquiry by the Competition Commission into Cineworld’s acquisition of the Picturehouse chain confirmed that ‘although Picturehouse cinemas show art-house and foreign-language films, a large proportion of Picturehouse’s revenues comes from more mainstream films, in direct competition to Cineworld’ (BBC News Website 2013). As a result, Cineworld was forced to sell its Picturehouse cinemas in Aberdeen and Bury St Edmunds, and a Cineworld multiplex cinema in Cambridge.

The third reason why admissions for foreign-language European films have declined in recent years is market saturation. Since the millennium, the number of films released in the UK each year has almost doubled, from 369 in 2002 to 698 in 2013 (BFI 2014). This is partly due to the impact of new digital technology, which has not only boosted the supply of films by lowering production costs, but also made it easier for cinemas to switch their programme, as well as offer alternative content, such as event cinema and live theatre screenings. With so many new releases each week, it has become harder for individual titles to standout or stay on screens long enough to build an audience. Foreign-language European films – which are most dependent on newspaper reviews and positive word-of-mouth for their publicity – have found it particularly difficult to make their mark. As one distributor explained, ‘It’s not only the quality of the review which matters; it is the amount of space the film review gets in the paper. The big weekly film release tends to get quite a lot written about it while everything else gets a couple of paragraphs’.[[8]](#endnote-8)

Finally, the cost of releasing European films has increased. In order to contribute to the costs of converting UK cinemas to digital, distributors have been forced to pay a Virtual Print Fee (VPF), calculated to offset the savings they make on producing and shipping physical 35mm prints. However, while the virtual print fee has worked well for mainstream Hollywood studio releases, some independent distributors complain it actually makes smaller, platform releases – which is how most European films are introduced to the market – more expensive (Lodderhose 2010; Macnab 2016). As one independent distributor explains, ‘The Virtual Print Fee will effectively charge you £500 if you want to move your digital print of a film from one cinema to the next. It therefore acts a considerable disincentive to the wider circulation of European films’.[[9]](#endnote-9)

**Why some European films achieve breakout success**

While most European films perform badly in the UK market, a handful do ‘breakout’ each year. These are defined in the industry as films which have secured at least £1 million (about 200,000 admissions) at the UK box office. Using this figure as a benchmark, 34 films (6.7% of European releases) were identified as breakout titles from a database of 504 European films released in the UK in the period 2007-13 created using admissions figures and other data (e.g. country-of-origin, distributor, genre, language, widest point of release, audience and critic ratings) from LUMIERE, IMDb and Box Office Mojo (table 1).[[10]](#endnote-10) Two-thirds were English language films, while the remainder were foreign-language titles. The English-language titles can be further divided into action blockbusters (9 films), animations (7), and dramas (5).

***English-language European films***

English-language European films generally perform well in the UK because they suffer less cultural discount. Action blockbusters are particularly likely to achieve breakout success because they are designed with qualities (e.g. big budget special effects and a star cast) that appeal to mainstream British audiences. Though some of these films do feature foreign European characters and settings, their ‘heroes’ are generally Brits or Americans, while their ‘villains’ tend to be European ‘others’, often from eastern Europe. In *Taken*, for example, Liam Neeson plays a former CIA operative who sets about tracking down his daughter after she is kidnapped by Albanian human traffickers for sexual slavery while traveling in France.

Other English-language films find it harder to breakout: only 25.9% of animations and 8% of English-language dramas achieved breakout success in the period 2007-13. The most successful European animations tend to feature cast members which British audiences are familiar with. *Animals United* (Klooss & Tappe, Germany, 2010), for example, was voiced by the English comedians Stephen Fry and James Corden, while *Arthur and the Invisibles* (Besson, France, 2007) featured the musicians Madonna and David Bowie. Most also imitate popular Disney/Pixar and DreamWorks animations. Indeed, *Animals United* was described by one online blogger as ‘a blatant rip off of the far superior *Madagascar*’ (Smiles 2012), while *The Guardian’s* Peter Bradshaw called *Sammy’s Adventures* (Stassen, Belgium/USA, 2011) ‘the poor cousin of *Finding Nemo*’ (Bradshaw 2011). By comparison, those animated films which fail to breakout tend to be more culturally distinctive in terms of their style and content.

The most successful English-language dramas also tend to feature cast members, characters and settings which are familiar to British audiences. *The Ghost Writer* (Polanski, France/Germany/UK, 2010), for example, stars Scottish actor Ewan McGregor as a writer who is hired to complete the memoirs of a former British Prime Minister (played by the former Bond actor Pierce Brosnan) who has been accused of a possible war crime – a topic which drew obvious comparisons with the Blair premiership when it was released in 2010. Similarly, *Cloud Atlas* (Tykwer, Wachowski & Wachowski, Germany/USA, 2013) features Hollywood stars Tom Hanks and Halle Berry, as well as the English actor Jim Broadbent, while *The Impossible* (Bayona, Spain, 2010) again stars Ewan McGregor alongside Naomi Watts as a British family caught-up in the 2004 Indian Ocean tsunami. However, some English-language dramas succeed for other reasons. *The Artist* (Hazanavicius, France/Belgium, 2011), for example, attracted interest partly because of its novel concept (as a modern black-and-white silent film), and partly because of its outstanding reviews and the buzz surrounding its Oscar success. Meanwhile, *Silent Hill: Revelation 3D* (Bassett, France/USA, 2012) features some familiar British faces (e.g. Sean Bean), but perhaps owed its success more to the fact it was based on a popular video game franchise (also a factor in the success of the *Resident Evil* films).

As well as suffering little cultural discount, most breakout English-language European films also face fewer structural problems at the level of production and distribution (table 3). They tend to have higher budgets by European standards and are often co-produced with international partners. They are also largely distributed by Hollywood studios (e.g. 20th Century Fox, Universal or Warner Bros.) or major independent distributors (e.g. eOne, Momentum or Studiocanal), and generally receive a ‘saturation’ release. The average English-language European action blockbuster, for example, reached about half the country’s cinemas, in most cases premiering within the top three ranking films, despite poor reviews.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | **English-language action blockbuster** | | **English-language animation** | | **English-language dramas** | | **Foreign-language films** | |
|  | **Breakout** | **Not**  **breakout** | **Breakout** | **Not breakout** | **Breakout** | **Not breakout** | **Breakout** | **Not breakout** |
| *Budget* | Budget ($) | 50,452,856 | 20,000,000 | 45,594,480 | 23,401,245 | 45,400,000\* | 16,005,865 | 12,193,051 | 9,890,957 |
| *Production category* | Co-production | 77.8% | 50.0% | 42.9% | 70.0% | 80.0% | 83.3% | 38.5% | 46.3% |
| Domestic | 22.2% | 50.0% | 57.1% | 30.0% | 20.0% | 16.7% | 61.5% | 53.7% |
| *Distribution category* | Hollywood major | 77.8% | 0.0% | 14.3% | 0.0% | 20.0% | 7.6% | 7.7%\* | 0.5% |
| Major independent | 11.1% | 50.0% | 85.7%\* | 35.0% | 80%\* | 21.2% | 76.9%\* | 19.6% |
| Specialist independent | 11.1% | 50.0% | 0.0% | 65.0% | 0.0% | 71.2% | 15.4% | 79.8%\* |
| *Admissions* | UK | 929,622 | 95,238 | 591,963.3\* | 38,102 | 965,410.4\* | 28,144 | 312,502.4\* | 18,992 |
| US | 7,625,568 | 900,744 | 1,118,342 | 244,417 | 2,491,834.2\* | 57,995 | 771,972.6\* | 30,147 |
| Europe | 5,197,970 | 763,267 | 4,833,483.6\* | 1,299,339 | 6,634,473 | 512,819 | 7,167,023.6\* | 838,614 |
| *Distribution support* | MEDIA (€) | - | - | - | 7,856 | - | 19,512 | 12,520 | 15,755 |
| BFI (€) | - | - | - | 20,508 | - | 9,924 | 120972.2\* | 11,012 |
| *Release strategy* | Rank | 3.1 | 7 | 4.6 | 20.3\* | 4.4 | 21.4\* | 9.6 | 25.9\* |
| Open wk/end | 372.1 | 169 | 401.6\* | 68.5 | 272.4\* | 51.3 | 76.6\* | 17.2 |
| WRP | 374 | 169.5 | 422.1\* | 75.4 | 343.8 | 52.5 | 104.6\* | 19.5 |
| Weeks | 7.1 | 2.5 | 14.4 | 13.6 | 9.4 | 6.3 | 16.7\* | 6.5 |
| *Audience rating* | IMDb | 6.2 | 6.4 | 6.2 | 6.3 | 7.1 | 6.7 | 7.7\* | 6.8 |
| Rotten Tomatoes | 54.8 | 74 | 42.3 | 63.1\* | 68.8 | 61.2 | 76.7\* | 65.2 |
| *Critics rating* | IMDb | 40 | 54.5\* | 39 | 64.3 | 61.8 | 58.6 | 73.4 | 69.5 |
| Rotten Tomatoes | 36.6 | 75 | 32 | 58 | 66.6 | 62.1 | 80.3 | 78.2 |
| *Awards* | Awards | 1 | 3.5 | 0.7 | 2.9 | 37.4\* | 5.2 | 22.1\* | 5.9 |
| Nominations | 2.7 | 7 | 2.3 | 6.3 | 48.8\* | 6.1 | 23.3\* | 7.8 |

Table 3. Production, distribution and box office profile of European films by language/genre. (\*indicates significant differences from the mean at the p=0.05 level). Sources: LUMIERE / MEDIA / BFI / Rotten Tomatoes / Box Office Mojo.

***Foreign-language European films***

It is perhaps unsurprising that English-language European films do well in the UK. What is potentially more interesting to debates about the transnational media flow is why some foreign-language European titles also manage to achieve breakout success given the heavy linguistic cultural discount these films inevitably suffer in the UK market. Of the 395 foreign-language European films released in Britain in the period 2007-13, only 13 (3.3%) achieved breakout success by selling 200,000 cinema tickets. But while many British cinemagoers would have been put off these films by their language and use of subtitles, BFI cinema exit polls (which are available for seven of the 13 films) suggest these films nevertheless possess certain qualities – what the polls refer to as ‘baits to attendance’ – which have enhanced their audience appeal (table 4).

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Baits to attendance** | **The Lives of Others** | **Coco Before Chanel** | **Let the Right One In** | **Tell No One** | **The Girl with the Dragon Tattoo** | **Broken Embraces** | **The Skin I Live In** | ***Average*** |
| **The story appealed to me** | 52% | 50% | 46% | 41%\* | 28% | 17% | 27% | *37%\** |
| **Genre / type of film** | 42% | 26% | 36% | 35% | 18% | 28% | 31% | *31%* |
| **Reviews** | 56%\* | 12% | 56%\* | 31% | 24% | 0% | 28% | *30%* |
| **Director** | 0% | 2% | 0% | 6% | 0% | 74%\* | 74%\* | *22%* |
| **Star** | 0% | 32% | 0% | 7% | 0% | 49% | 36% | *18%* |
| **Asked by friend / partner** | 0% | 10% | 32% | 11% | 17% | 21% | 20% | *16%* |
| **Advertising / poster** | 14% | 14% | 13% | 18% | 10% | 11% | 10% | *13%* |
| **Subject / events of the film** | 0% | 53%\* | 0% | 0% | 0% | 0% | 14% | *8%* |
| **Source material (e.g. book)** | 0% | 0% | 0% | 7% | 43%\* | 0% | 0% | *8%* |
| **Trailer** | 21% | 0% | 0% | 0% | 9% | 14% | 0% | *7%* |
| **Award** | 28% | 0% | 0% | 0% | 0% | 0% | 8% | *5%* |
| **Friends talking about it** | 0% | 9% | 0% | 5% | 16% | 0% | 29% | *5%* |
| **Nationality of film** | 0% | 0% | 0% | 5% | 0% | 0% | 0% | *4%* |
| **Cast members** | 0% | 3% | 0% | 6% | 0% | 0% | 12% | *3%* |
| **Shown at festival** | 0% | 0% | 0% | 0% | 0% | 0% | 0% | *0%* |

Table 4. Key 'baits to attendance' for 'breakout' foreign-language European films. (\*indicates highest ranked bait). Sources: UKFC/BFI 2007-13.

The most popular bait to attendance cited in the polls was ‘the story appealed to me’. This may seem a rather vague explanation, but it does indicates that breakout films have clearer narratives than most European arthouse films. This is not to suggest their stories and characters are simplistic – they may be quite complex as in the case of the French thriller *Tell No One* (Canet, France, 2007) – but they do nevertheless follow a definite dramatic structure. The phrase ‘the story appealed to me’ also indicates that audiences have familiarised themselves with the basic outline of the film’s plot before purchasing their ticket. This is of course rationale consumer behaviour – it is unlikely someone would pay £10 or so to watch a film they know nothing about – yet it also points to the fact that, in the case of films featuring unfamiliar actors, it is the story rather than the stars which sells the film.

The other two key baits to attendance were ‘genre’ and ‘reviews’. Genre was notably the most popular bait for the horror films *Let the Right One In* (Alfredson, Sweden, 2009) and *The Orphanage* (Bayona, Spain, 2008), which suggests that part of the reason why these films succeeded was because they appealed not only to the core foreign-language film audience, but also horror fans as well, so attracting two different types of audience. YouGov (2015a, 2015b) consumer profiles confirm that the audience for both films is younger, more working-class and less metropolitan than is the case with the typical audiences for foreign-language films.

Reviews were the key bait in the case of the German Cold War drama *The Lives of Others*, one of the most critically-acclaimed European films of the past decade. The importance which distributors place on reviews can be seen in the way five-star ratings and choice quotes are often used in posters and other marketing material. One distributor even claimed that *The Guardian’s* chief film critic Peter Bradshaw ‘can make or break a film’ in the specialised film market.[[11]](#endnote-11) Certain high profile awards such as Oscars or the BAFTAs can also lure audiences (though the exit polls for *The Lives of Others* suggest this was only the fourth most important bait to attendance). However, while there is some correlation between reviews or awards and box office performance, critically-acclaimed European films do not always perform well in the UK. For example, the Romanian film *4* *Months, 3 Weeks and 2 Days* (Mungiu, Romania, 2007), one of the highest ranked European films according to IMDb’s ‘Metacritic’ aggregator, sold only 58,005 tickets in the UK. Nevertheless, reviews do build public awareness and provide important sources of information about the film’s story, which as we have seen, is one of the key draws for audiences.

Analysis of the entire dataset of 173 exit polls conducted by the UKFC/BFI between 2005 and 2015 indicate that cinemagoers are rarely drawn to foreign-language films because of their language or nationality – which suggests that the opportunity to encounter other European cultures and identities adds little to the appeal of these films. Nor are the film’s director, subject matter or source material significant baits to attendance in the majority of cases.[[12]](#endnote-12) However, for some breakout foreign-language European films, it was precisely these three elements which attracted cinemagoers. In the case of *Broken Embraces* and *The Skin I Live In* (Almodovar, Spain, 2011), for example, 74% of those polled said they had come to the see these films specifically because they were directed by Spain’s Pedro Almodovar, a director described by one veteran UK distributor as ‘one of the few big-named directors left’ in Europe. In the case of *Coco Before Channel* the top bait to attendance was ‘an interest in the life Coco Chanel’, while in the case of *The Girl with the Dragon Tattoo*, the main draw was the fact that almost half the audience had ‘read the book’ on which the film was based.

In general, then, foreign-language European films are most likely to breakout if they possess what distributors call ‘pre-sold’ elements – things about the film which audiences are already familiar with, such as the director, stars, subject matter or source material. In cases where films do not possess any pre-sold elements, they must instead rely on the appeal of their story, genre and reviews. Either way, the key factor seems to be the degree to which audiences are already familiar with some aspect of the film. Of course, for the ‘core’ foreign-language film audience the ‘otherness’ and ‘exoticism’ of these films may be a key part of their appeal – as we have seen, foreign-language film fans are more likely to most to enjoy learning about other cultures. Yet for such films to crossover from their core audience to a more mainstream one (and so become a breakout film in box office terms), they also need to include some element of cultural familiarity. Without that element of cultural familiarity, more mainstream audiences are unlikely to risk the time and money to watch a foreign-language European film in the cinema (though they might do so on a free-to-view platform).

Finally, it is also worth pointing out that the exit polls show that a higher proportion of the audience for breakout foreign-language European films are women. A final bait to attendance could therefore be that the majority of these films feature strong female characters in their lead role. As such, they appeal to a section of the cinema-going public who are generally underserved by more mainstream films.

Yet important as a film’s cultural content may be to its audience appeal, most breakout foreign-language European films still owe a large part of their success to industrial factors (table 3). The production budgets for breakout foreign-language European films are on average not much higher than their non-breakout counterparts, and unlike most English-language European films, the majority are domestic productions rather than international co-productions. Nevertheless, breakout foreign-language European films are generally backed by large distributors. Compare, for example, *Coco Before Chanel*, which was distributed by Studiocanal, a major independent distributor, with the box office flop *Coco Chanel and Igor Stravinsky* (Kounen, France, 2009), which was released by the specialist independent distributor, Soda Pictures. 84.6% of breakout foreign-language European films were distributed by either Hollywood studios or major independent distributors, compared with only 20.1% in the case of their non-breakout counterparts (table 3). As such, they opened in four times as many theatres (76.6 theatres compared with 17.2), reached five times as many theatres at their widest point of release (104.6 theatres compared with 19.5), and lasted two and a half times as long in cinemas (16.7 weeks compared with 6.5).

In terms of distribution support, breakout foreign-language European films actually received less MEDIA funding than their non-breakout counterparts (an average of €12,520 per film compared with €15,755), but significantly more support from the BFI’s P&A scheme (€120,972 per film compared with €11,011), with nine of the 11 breakout films receiving BFI funding. This is revealing because BFI distribution support tends to be more effective than MEDIA funding. For example, while simple regression analysis shows that it takes €2.50 of MEDIA funding to generate an extra ticket sale (b=0.403, p<0.05), it only takes €1.40 of BFI funding to achieve the same outcome (b=0.708, p<0.05). Thus a film with a BFI award of €40,000 could expect to achieve 12,000 more admissions than a film which had received the same amount from the MEDIA programme.

This difference can be explained by the fact that the average BFI award tends to be almost twice as large as the average MEDIA award (€61,660 compared with €39,108), as well as more selective, specifically targeting foreign-language films which the funding body feels are likely to appeal outside the core audience for specialist films. Unlike the MEDIA programme, the BFI also allows funds to go to UK distributors that are owned by non-European parent companies (e.g. eOne, Icon, Lionsgate) and which tend to have more financial resources than their European counterparts.

**Conclusion**

European films generally perform badly in the UK for two main reasons. Firstly, they face a heavy ‘cultural discount’ because their language, content and aesthetic style only appeals to a minority of British film viewers. Secondly, they suffer from structural weaknesses at the level of production and distribution. The majority have small budgets and are distributed by specialist independent distributors which lack market leverage. As such, they do not circulate widely or stay in cinemas long enough to build an audience.

Those European films which do achieve breakout success fall into two camps. Firstly, there are English-language European films which feature qualities which appeal to a mainstream British audience, such as big-budget special effects and famous cast members. Secondly, there are foreign-language European films whose linguistic cultural discount is mitigated by the fact they possess certain ‘pre-sold’ elements – for example, a well-known story, genre, director, subject matter or source material – which British cinemagoers are already familiar with. In each case, though, breakout European films almost always enjoy the backing of either a Hollywood studio or a major independent distributor.

This suggests that distribution is key to determining whether or not a foreign-language European film will achieve breakout success. At the same time, Hollywood studios or major independent distributors will only acquire films which they think have the qualities (e.g. pre-sold elements) which they think will appeal to a large audience and so generate more profit. In such instances, they will use their financial muscle to ensure they secure these films against the competition from smaller, specialist distributors. Success is therefore dependent on a combination of both cultural and economic factors.

These findings add to the literature on transnational media flow. On the one hand, they confirm that ‘cultural discount’ is one of the key reasons why films produced in one country do not easily travel to another. On the other hand, they underline the importance of political-economic factors such as distribution and exhibition in terms of enabling films to travel across borders. That is not to say that a European film distributed by a Hollywood studio is likely to perform well in the UK market – it still needs some cultural elements which British audiences can identify with. But where European films do possess these pre-sold elements they are unlikely to succeed without high investment in distribution and access to cinema space. In other words, cultural discount alone does not explain why some films travel better than others.

In terms of current policy debates, the findings suggest that bodies like the EU’s MEDIA programme are right to prioritise investment at the level of distribution and exhibition in order to increase the circulation and viewership of European film. However, as this paper has also shown, these measures could clearly be made more effective. For example, the MEDIA programme could learn from the BFI’s P&A by targeting funds on those European films with familiar cultural elements which British audiences are likely to identify with. It could also make UK distributors owned by non-European parent companies (e.g. eOne, Icon, Lionsgate) eligible for distribution support, as these tend to be better resourced than their European-owned counterparts.

Of course, it is also important to point out that cultural familiarity is not necessarily innate, but something learnt through education and other forms of socialisation (see Bourdieu 1984) – one reason why those with high cultural capital are most likely to watch European films (see also Hill 2004). Thus, as well addressing structural weaknesses at the level of distribution, policymakers also need to consider the role which film education and media literacy can play in developing an audience for Europe film. The decision of the EU’s new Creative Europe scheme, which subsumed the MEDIA programme in 2014, to introduce a new strand of funding for ‘audience development’ suggests European policymakers are certainly aware of this issue.

Yet such reforms to the MEDIA programme may prove to be irrelevant as far as the British film industry goes. Britain’s decision to leave the EU means that in future no UK-based distributors will be eligible for MEDIA distribution support. Some predict that European films could disappear from British cinemas. As *The Guardian’s* film editor Andrew Pulver (2016) puts it:

We would probably still get high-profile award-winners such as *Dheepan* and *Son of Saul*, but what chance would there be of seeing lesser-known stuff such as *Suburra* or *Long Way North* in British cinemas again? They only get here with EU help.

Britain could perhaps opt to remain part of the MEDIA programme, since the scheme is certainly open to non-EU countries such as Norway and Iceland. Alternatively, the UK government could use some of the money saved from EU membership to boost the BFI’s P&A fund for specialist films. Either way, without a proper understanding of both the cultural factors (e.g. language, aesthetic style, cultural familiarity) and industrial factors (e.g. distribution and access to cinema screen space) which influence the box office performance of European films in the UK, any policy intervention to increase the audience for these kinds of films is unlikely to succeed.

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**Figures captions**

Figure 1. Box office share (%) for films released in the UK by country of origin, 2002-13. Source: BFI 2014.

Figure 2. Type of film / genre preferred by British film viewers. Source: BFI 2011.

Figure 3. UK admissions for English-language and foreign-language European films, 2007-13. Source: BFI 2014.

1. ‘European films’ are defined as feature films which have been majority produced in the EU28 member states or European Free Trade Area (i.e. Norway, Iceland, Switzerland and Liechtenstein). The term ‘European film’ excludes UK films and UK majority co-productions. This is to not to suggest Britain is not part of Europe, but to avoid the more cumbersome (yet accurate) phrase ‘non-national European film’. [↑](#endnote-ref-1)
2. Interviews were conducted with: Agnieszka Moody (Creative Europe Desk UK); Alex Agran (Arrow Films); Catherine De Forges (Independent Cinema Office); Dan Borgonon (Channel 4); Ed Fletcher (Soda Pictures); Jason Wood (Curzon Cinema/HOME Manchester); Joan Parsons (Sheffield Showroom); Katie Ellen (BFI); Marion Comengre (Studiocanal); Mark Batey (Film Distributors Association); Robert Beeson (New Wave); Sonali Joshi (Day for Night); and Tom Abell (Peccadillo Pictures). Anonymous interviews were also conducted with representatives from the UKFC and the European Commission. [↑](#endnote-ref-2)
3. The BFI defines ‘specialised’ films as ‘films that do not sit easily within a mainstream and highly commercial genre’. They include foreign language films, documentaries, classic or archive films, and films which tell a story in an unconventional, challenging way. <http://www.bfi.org.uk/film-industry/lottery-funding-distribution/specialised-films> [↑](#endnote-ref-3)
4. This analysis was conducted the BFI survey’s raw SPSS data, which are available online: <http://www.bfi.org.uk/about-bfi/policy-strategy/opening-our-eyes-how-film-contributes-culture-uk> [↑](#endnote-ref-4)
5. Catherine de Forges (Independent Cinema Office) interview with author, January 30, 2015. [↑](#endnote-ref-5)
6. Robert Beeson (New Wave) interview with author, January 22, 2015. [↑](#endnote-ref-6)
7. Ed Fletcher (Soda Pictures) interview with author, January 23, 2015. [↑](#endnote-ref-7)
8. Robert Beeson (New Wave) interview with author, January 22, 2015. [↑](#endnote-ref-8)
9. Laurence Gornell (The Works) panel discussion with author at the “UK Film Distribution: What’s Changing?” Conference, Regent Street Cinema, London, July 21, 2016. Available online: <https://www.youtube.com/watch?v=XqIUO0OEVmI> [↑](#endnote-ref-9)
10. LUMIERE database (<http://lumiere.obs.coe.int/web/search/>); IMDb (<http://www.imdb.com/>); Box Office Mojo (<http://www.boxofficemojo.com/>) [↑](#endnote-ref-10)
11. Tom Abell (Peccadillo Pictures) interview with author, January 21, 2015. [↑](#endnote-ref-11)
12. The BFI exit polls are available online: <http://www.bfi.org.uk/film-industry/lottery-funding-distribution/insight-reports-case-studies-audience-research/exit-polls> [↑](#endnote-ref-12)