INFORMATION PAPER NO. 29 MARCH 2016

Diversity and the film industry

An analysis of the 2014 UIS Survey on Feature Film Statistics

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Published in 2016 by:

UNESCO Institute for Statistics
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Montreal, Quebec H3C 3J7
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http://www.uis.unesco.org

ISBN 978-92-9189-190-0
Ref: UIS/2016/CUL/TD/6
DOI : http://dx.doi.org/10.15220/978-92-9189-190-0-en

Acknowledgements

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The report was produced as part of the research project "Diversity of the Audiovisual Industry in the Digital Era" (ref. CSO2014-52354-R), within the State Program for R&D+i focusing on the Challenges of Society *(Programa Estatal de I+D+i Orientada a los Retos de la Sociedad*) organized by the Ministry of Economy and Competitiveness of Spain (*Ministerio de Economía y Competitividad de Spain).*

Table of contents

1. Introduction

This report analyses the results of the 2014 UIS Feature Film Statistics Survey, which provides data for the years 2012 and 2013 for 97 countries[1], with an emphasis on the relationship between cultural diversity and the functioning of the film industry. Additionally, it presents some selected indicators for the period 2005-2013, with the goal of enabling a better understanding of the recent evolution of the film industry at the global level.

It should be noted that cultural diversity, the concept advocated by the *Convention on the Protection and Promotion of the Diversity of Cultural Expressions* (UNESCO, 2005), is one of the principles that guides the efforts of numerous States in terms of audiovisual policy. Therefore, the background for the preparation of this report includes both previous reports from the UIS[2] and papers on media diversity dealing with the integrated operation of audiovisual industries: from the creation and production of content to the enjoyment of content by people.[3]

The notion of audiovisual diversity is a complex one, and when applied to the film industry, it can be broken down into three basic components (with their respective subcomponents):[4]

1) Diversity of sources. This category comprises the following subcategories: diversity of content producers and distributors, and diversity of the labour employed by companies.

2) Diversity of and in feature films. This category is broken down into: diversity of film genres; demographic diversity (racial, ethnic and gender differences of the people involved in feature films) and diversity of ideas (points of view and social, political and cultural perspectives) in feature films.

3) Diversity of audience exposure to feature films. This category is broken down into: diversity of horizontal exposure (associated with the distribution of audiences through feature films available at a given time) and diversity of vertical exposure (associated with the diversity of contents consumed by a certain individual or social group over time).

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1 A total of 75 countries answered the questionnaire. One country sent the information by e-mail, and the UIS estimated the results for the other 21 countries comprised in this report.

2 This analysis builds on previous papers published by the UIS: *Analysis of the 2007 UIS International Questionnaire on Feature Film Statistics* (UIS/Bernier and Bernier, 2009), based on the preliminary study of I. Bernier (University of Laval) and S. Bernier (University of Québec at Trois-Rivières); *From International Blockbusters to National Hits: Analysis of the 2010 Questionnaire of Feature Film Statistics* (UIS/Acland, 2012), prepared by C.R. Acland (University of Concordia); *Linguistic Diversity of Feature Films* (UIS, 2012); *Feature Film Diversity* (UIS, 2013); and *Emerging Markets and Digitization of the Film Industry: An Analysis of the 2012 International UIS Questionnaire of Feature Film Statistics* (UIS/González, 2013), by R. González (Universidad de Buenos Aires).

3 The studies on media diversity include the work of D. McQuail and J. van Cuilenburg (1983), D. McQuail (1992), P. Napoli (1999), E. Bustamante (2002), P. Bouquillion and Y. Combès (2011), and L.A. Albornoz and M.T. García Leiva (2016).

4 This is the continuation of the pioneer work led by P. Napoli (1999) regarding his analysis on the principle of diversity in U.S. radio broadcasting.

For the purposes of this analysis to evaluate the diversity of an audiovisual system – which depends on a multiplicity of factors – one should consider that (Albornoz and García Leiva, 2016):

- The capacity of production, distribution and screening/release of audiovisual contents is not concentrated in a reduced number of agents, and contents have different ownership types, sizes and geographical origins.
- Audiovisual contents have differences in terms of variety, balance and disparity in values, identities and aesthetics. These contents should mirror the multiplicity of groups co-existing in a given society, on the one hand, and echo the expression of foreign cultures.
- People can access and choose among an array of audiovisual contents, and even create and disseminate them.[5]

The following sections delve into certain dimensions of the film industry based on the outcomes of the UIS questionnaire and other complementary sources of information. These sources include the annual surveys of the Motion Picture Association of America (MPAA), documents released by UNESCO and its Institute for Statistics, the Lumière Database of the European Audiovisual Observatory, the Film Federation of India (FFI), the Internet Movie Database (IMDb), and academic and specialised publications in the film industry (*Box Office Mojo*, *The Hollywood Reporter*), among others.

Section 2 addresses the study of the sources of feature films for 2012 to 2013, particularly the sources of film production and international co-production, and the distribution of films in cinemas, paying attention to language diversity and the spectrum of categories. Section 3 focuses on the characteristics of feature films, emphasising the diversity of languages and categories. Section 4 presents consumption diversity in cinemas, analysing the main international markets based on gross box office and the particularities of the global blockbusters during the biennium in question. Finally, Section 5 presents the conclusions of this report.

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[5] Considerations developed by the researchers in charge of executing the project “Cultural diversity and the audiovisual sector: Good practices and indicators” (ref. CSO2011-26241), prepared during the three-year period 2012-2014 as part of the National Plan for Scientific Research, Development and Innovation (Plan Nacional de Investigación Científica, Desarrollo e Innovación Tecnológica, I+D+i) of the Ministry of Economy and Competitiveness of Spain. Other definitions of key concepts associated with the issue of diversity in audiovisual systems can be found in the Glossary: http://diversidadaudiovisual.org

2. Diversity of feature films: Production, co-production and distribution

A key point for the analysis of diversity in the audiovisual sector is the array of contents that are made available to those who ultimately are (or are not) the end users. In the film industry, a cultural sector with a high degree of internationalisation, a chain of intermediaries – from creators to production companies, distributors and cinemas – is set in motion for films to reach the big screens.

To evaluate the diversity of film systems, it is particularly interesting to observe not only the film production phase but also, and importantly, the operation of the distribution sector. This sector is directly involved in the definition of which movies make it to the theatres and in what terms they are premiered. In most countries, local distributors face the competition, and practices, of the so-called 'Hollywood majors', which have dominant positions and offer screening opportunities to the most commercially successful films.

During the 2005-2013 period, the production of feature films increased globally to a record of 7,610 films made. A remarkable share were made by the top five producing countries, led by India. This is further analysed in this section.

This section also describes an instrument of cultural diversity: international co-productions of feature films. Led by organizations from France and the United States during the 2012-2013 biennium, this practice – supported by numerous States and led by commercial companies – provides a means of increasing the international dissemination of movies and of accessing new markets. Finally, this section addresses the distribution of films in cinemas and the problem of business concentration (i.e. the dominant presence of the so-called 'U.S. majors' in several countries) present in this link of the film industry value chain.

2.1 Worldwide production and countries with leading production

In 2012, 7,478 feature films were produced by a total of 88 countries. In 2013, this figure grew to 7,610 feature films produced by companies in 86 countries *(see Figure 2).* There was a 13% growth in worldwide production, comparing production by 90 countries in 2011 to 88 countries in 2012. This significant rise in global film production – the highest year-to-year growth during the 2005-2013 period – was crowned by a growth of 1.8% in 2013. In general terms, it is possible to observe that data for the 2012-2013 biennium add to the continuity of the upward curve in global film production over recent years.

As shown in **Table 1**, the worldwide production of feature films has grown by 64% since 2005. Throughout the 2005-2013 period, the set of countries included in Table 1 represented over 50% of worldwide production, which demonstrates strong geographic concentration in some of the most heavily populated countries of the world, in spite of the diversity of feature film-producing countries. With the exception of large U.S. companies whose feature films are distributed and seen on the five continents, production from the other four leading countries generally have geographically more restricted circulation. Feature films produced in India, for instance, are popular with the Indian diaspora, as well as Afghanistan, Egypt, Nigeria and Pakistan.

Table 1. Worldwide production of feature films, 2005-2013

	2005	2006	2007	2008	2009	2010	2011	2012	2013
World production*	4,642	5,016	5,532	6,117	6,242	6,503	6,629	7,478	7,610
Number of countries	95	89	96	100	100	94	90	88	86
Percentage of the top 5 producers	59.6%	54.1%	53.9%	52.6%	52.5%	51.7%	51.2%	53.0%	52.0%
Annual growth rate	2005-2006		2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
	8.1%		10.3%	10.6%	2.0%	4.2%	1.9%	12.8%	1.8%
Growth rate 2005-2013	**63.9%**								

Note: ***Feature films from Cambodia, Cameroon, Gabon and Nigeria were not included because they were produced in video format.
Source: UIS database, December 2015

Over the last nine years, the top feature film-producing countries have remained relatively consistent, led by India and with shifting degrees of predominance among China, India, Japan, the United States and, alternatively, the United Kingdom or France *(see **Table 2**)*.

As shown in Table 2 and in **Figure 1**, during the 2012-2013 biennium, India – with a population of more than 1.25 billion – produced the most feature films: 1,602 films were made in 2012 and 1,724 in 2013; representing a year-to-year growth of 7.6%.[6] These figures confirm the leadership of India in the international film market, which reported remarkable growth in its feature film production (66%) during the 2005-2013 period. This growth is attributable to different factors, including the re-emergence of regional film production beyond Mumbai (ex-Bombay) producers and the growing adoption of digital technologies (E&Y and LA India Film Council, 2012).

In 2012 and 2013, the second and third positions of top feature film-producing countries have been claimed by China (with 1.38 billion inhabitants) and the United States (with 320 million inhabitants). In 2012, China produced 745 feature films; in 2013, however, its production (638 feature films) diminished by 14% and it ranked third, following the United States in the second position, which produced 738 films in each of the years under review.

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6 In 2013, the Film Federation of India introduced two major changes in its work methodology. First, it stopped the counting of films based on the calendar year and adopted a different schedule, starting on 1 April of the preceding year and ending the last day of March of the reference year (therefore, data for 2013 are for the last nine months of 2012 and the first three months of 2013). Second, in tune with the industrial transformation of the sector, it started to show separately in its accounting feature films shot in analogue means (celluloid) film and those digitally made. As a result, the 2013 figures indicate that, of the 1,724 feature films produced, 744 (43%) were shot in celluloid and 980 (57%) in digital media. In 2014, 1,966 feature films were produced: 188 celluloid (10%) and 1,778 digital (90%), indicating that India is in the final stage of its technological conversion process (FFI, 2013 and 2014).

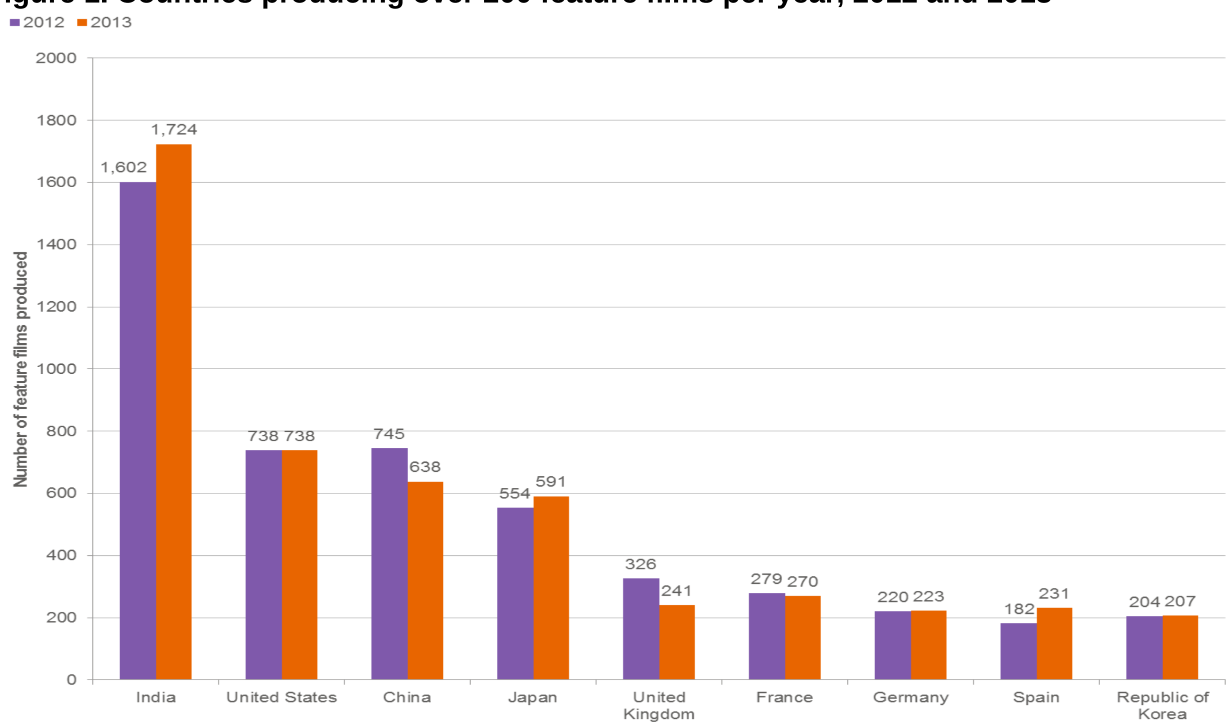
Table 2. Top feature film producing systems, 2005-2013

Top 5	2005	2006	2007	2008	2009	2010	2011	2012	2013
1st	India 1,041*	India 1,091*	India 1,146*	India 1,325*	India 1,288*	India 1,274*	India 1,255*	India 1,602*	India 1,724*
2nd	US 872	US 673	US 789	US 773	US 751	US 792	US 819	China 745*	US 738
3rd	Japan 356	Japan 417	China 411*	China 422*	China 475*	China 542*	China 584*	US 738	China 638*
4th	China 260	China 330	Japan 407	Japan 418	Japan 448	Japan 408	Japan 441	Japan 554*	Japan 591*
5th	France 240	France 203	France 228	UK 279	UK 313	UK 346	UK 299	UK 326	France 270

Notes: * UIS estimate
US: United States; UK: United Kingdom

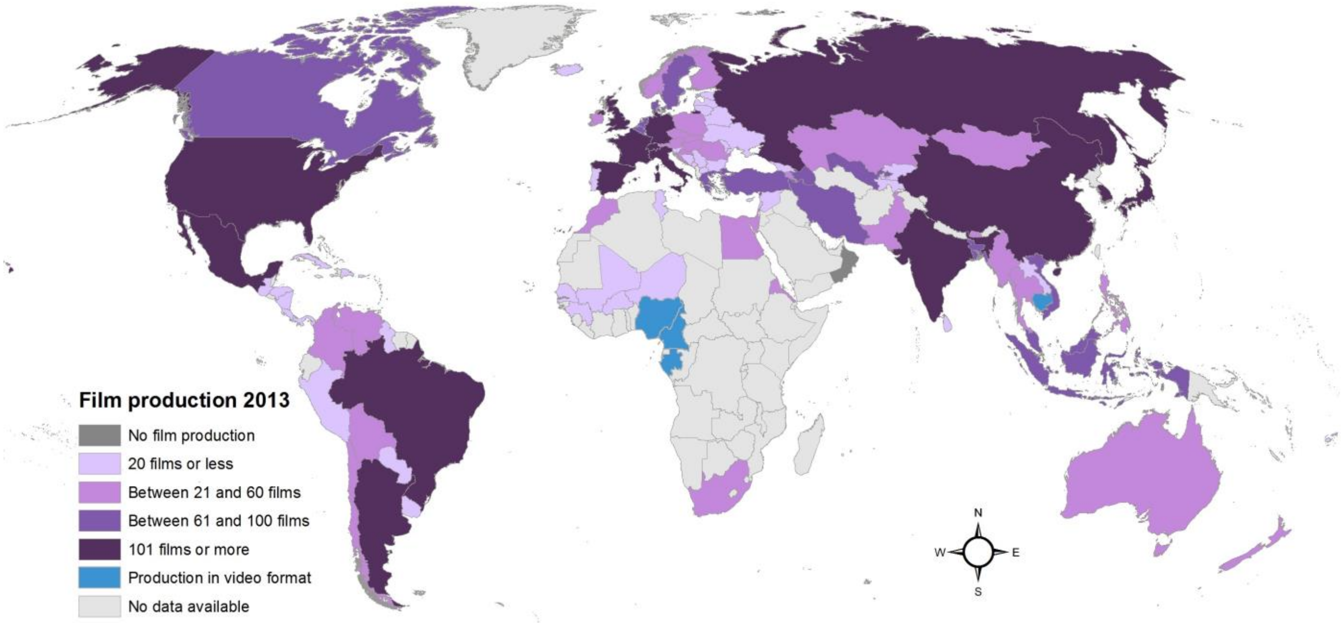
Source: UIS database, December 2015

Figure 1. Countries producing over 200 feature films per year, 2012 and 2013



Source: UIS database, November 2015

Figure 2. Concentration of worldwide feature film production, 2013



Source: UIS database, November 2015

2.2 International co-production of feature films

The international co-production of feature films, which involves companies from two or more countries that finance and produce films, can be considered a gateway to diversity of cultural expressions as it enables the exchange of human resources – both technical and artistic – across countries and, undoubtedly, facilitates the circulation of films across two or more film markets. In this regard, for instance, the European Convention on Cinematographic Co-production (CE, 1992) considers international co-production as "an instrument of creation and expression of cultural diversity".

It is worth noting that international co-production is a practice that started in the mid-20th century among companies from countries with major historical, cultural and/or linguistic ties. Furthermore, since the late 20th century, governments from wide political spectrums have been encouraging co-productions with other countries through international programmes, such as the Ibermedia Programme introduced in 1996 for the Ibero-American area. In a highly competitive and globalised market, international co-production is a way for film production companies to broaden their markets of operation.

In practice, through international co-production a feature film can have two or more 'nationalities', paving the way for tax incentives offered by different countries and taking advantage of other forms of public support designed to promote film production, distribution and/or screening. A study conducted at the end of the last decade by the European Audiovisual Observatory compared commercial circulation and performance of European co-productions to films of a single nationality, both inside and outside the respective national markets. The study drew the following conclusions: a) co-productions are released, on average, in twice as many markets as national productions; b) co-productions have revenues that are, on average, 2.78 times higher than national productions; and c) international commercial operation is larger for co-productions than for national productions – the international market provides 41% of co-production revenues compared to 15% for national productions (Kanzler, 2008: 1).

Data available for international co-productions (data are lacking for several countries, like China) show that international co-production is a widespread practice in the western area of the European Union and in the United States. **Table 3** shows France as the main country involved in international co-production activities during the 2012-2013 biennium: 245 feature films were co-produced (129 in 2012 and 116 in 2013), mainly in partnership with companies from other countries with geographical proximity: Belgium (84 feature films), Germany (45) and Italy (27). Overall, those three countries were involved in almost 64% of French co-productions. U.S. companies, on the other hand, produced a total of 209 feature films over the same period (115 in 2012 and 94 in 2013), mainly in partnership with companies from the United Kingdom (67 films), France (42) and Canada (33). Those three countries took part, in conjunction, in approximately 68% of U.S. co-productions.

It should be noted that, amongst the leading co-producing countries, the weight of international cinematographic engagements reached high shares in Belgium, Ireland and the Netherlands, even though these countries do not have a large production base. Co-production shares were 87% in 2012 and 76% in 2013 in the total share of Belgian feature films; for Ireland, these percentages were 68% and 62% in 2012 and 2013, respectively, while Netherlands' co-productions had a share of 49% in 2012 and 50% in 2013.

In recent years, the major production companies have broken down entry barriers for the powerful and increasingly profitable Chinese market.[7] Currently, Disney, Universal, Sony, Warner and DreamWorks Animation have joint ventures with Chinese companies for film co-production and/or distribution or for the introduction of new technologies. The U.S. majors' strategy is to produce with their Chinese partners on site for a fast-growing market while starting to export the same films to other territories.

Examples of the complex relations in the film industry between the United States and Chinese companies (Masters, 2013) and of their growing co-production activity include: *Iron Man 3* (Marvel Studios/Paramount in partnership with Chinese DMG Entertainment) *Transformers: Age of Extinction* (Paramount and others, with China Movie Channel), and the animation film *Kung Fu Panda 3* (DreamWorks Animation with Oriental DreamWorks) scheduled for worldwide release in 2016.

[7] Since 2012, the Chinese film market is the second-largest after the United States in terms of box office receipts. However, China limits the number of foreign films that can be premiered in their cinemas and how much dividends can be withdrawn. Following the claim by the U.S. government against China (China – Measures Affecting Trading Rights and Distribution Services for Certain Publications and Audiovisual Entertainment Products, see: https://www.wto.org/english/tratop_e/dispu_e/cases_e/ds363_e.htm) with the World Trade Organization (WTO), China authorised in 2012 the entry of another 14 foreign films per year (from 20 to 34), subject to the approval of the State Administration of Radio, Film and TV (SARFT), and the increase of 12% (from 13% to 25%) in the distribution of earnings to foreign film companies (see Coonan, 2014; Hays, 2008).

Table 3. Top feature film co-producing countries, 2012 and 2013

Country		Number of coproduction	Number of feature films produced	Presence of coproduction
2012				
1	France	129	279	46.2%
2	United States	115	738*	15.6%
3	United Kingdom	84	326	25.8%
4	Germany	82	220	37.3%
5	Spain	56	182	30.8%
6	Belgium	48**	55**	87.3%
7	Netherland	39	79	49.4%
8	Switzerland	39	93	41.9%
9	Italy	37	166	22.3%
10	Ireland	26	38	68.4%
2013				
1	France	116	270	43.0%
2	United States	94	738*	12.7%
3	Germany	88	223	39.5%
4	United Kingdom	74	241	30.7%
5	Spain	57	231	24.7%
6	Belgium	53**	70**	75.7%
8	Switzerland	42	103	40.8%
7	Netherland	34	68	50.0%
9	Italy	29	167	17.4%
10	Ireland	21	34	61.8%

Notes: Prepared with data from 44 countries for 2012 and 46 countries for 2013. Total co-production can be lower than the sum of feature films co-produced by a country. A feature film co-production may involve more than two foreign countries.
*Partial data. **UIS estimate.

Source: UIS database, November 2015

2.3 Feature film distribution

A key sector for analysing the diversity of the film industry is distribution. Distribution companies are directly linked to the diversity offered[8] to potential spectators, acting in many markets and reaching diverse audiences through cinema complexes.

Focusing on the distribution of feature films in theatres, the world's most successful films were distributed and promoted by companies belonging to the U.S. majors: Buena Vista (an affiliate of the Walt Disney Company), Sony Pictures Releasing, Twentieth Century Fox, Universal Pictures, Warner Brothers and Paramount Pictures. These companies have a dominant position in several countries of the world (in Latin America and Western Europe, for instance) and rule the distribution of both Hollywood blockbusters and locally-produced films that are likely to become commercial hits in their respective markets.

In addition, often the U.S. majors operate in foreign markets in a coordinated fashion, to the detriment of local productions and independent distributors, as can be seen in Spain (TDC, 2006). This has a negative impact on the diversity of feature films that the markets can offer to local audiences. Thus, many feature films do not access screening slots in the theatres of their country of origin.[9]

As shown in **Table 4**, a review of the international distribution of the most popular feature films during the 2012-2013 biennium reveals that there is a clear domination of the U.S. majors in this field. During this period, Warner Brothers distributed some of the U.S. films with the highest commercial success at the international level, including *The Dark Knight Rises*, *The Hobbit: An Unexpected Journey*, *The Hobbit: The Desolation of Smaug*, *Gravity*, *Pacific Rim*, and *The Hangover Part III*. Buena Vista (Disney) distributed *Marvel's The Avengers*, *Brave*, *Wreck-It Ralph*, *Frozen*, *Iron Man 3*, *Monsters University*, *Thor: The Dark World*, and *Oz The Great and Powerful*, to name but a few. And Paramount Pictures distributed *Madagascar 3: Europe's Most Wanted*, *World War Z*, *Star Trek Into Darkness*, *The Wolf of Wall Street*, and *G.I. Joe: Retaliation*.

In contrast with the wide-ranging dissemination at the international scale reached by U.S. productions, the distribution of feature films beyond the borders of the countries that produce them is a serious problem in regions such as Europe and Latin America. As mentioned by the European Commission when launching its 'European Film in the Digital Era' strategy in 2014, "the number of movies made in Europe went from 1,100 in 2008 to 1,300 in 2012, but for the most part they are only screened in the country of their production and rarely reach distribution across borders". Therefore, the European Union has a new strategy aimed at the "need to take full advantage of the new distribution methods to drive cultural diversity and competitiveness" (EC, 2014).

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8 Studies on the diversity of cultural expressions generally draw a distinction between diversity supplied or offered by the agents in various cultural industries – whatever their position in the successive phases of production, distribution and screening – and diversity accepted or actually consumed. Diversity offered is associated with goods and services that are made available, and diversity that is consumed is associated with the goods and services that are actually enjoyed by audiences (end consumers) or by any agent or groups of agents mediating between the phase of production and the final phase of consumption. Such a distinction has been considered, for instance, in studies by R. van der Wurff and J. van Cuilenburg (2001), as well as F. Benhamou and S. Peltier (2006).

9 With regard to the case in Spain, Aranzubia (2015) states, "it is no use producing 200 films per year if a high percentage of them (approximately 25%) does not reach the big screens".

Table 4. Blockbusters distributed by the U.S. majors, 2012 and 2013

Company	Feature films distributed	
	2012	2013
Warner Brothers	The Dark Knight Rises The Hobbit: An Unexpected Journey	The Hobbit: The Desolation of Smaug Gravity Pacific Rim The Hangover Part III
Buena Vista (Disney)	Marvel's The Avengers Brave Wreck-It Ralph	Frozen Iron Man 3 Monsters University Thor: The Dark World Oz The Great and Powerful
Sony Pictures Releasing	Skyfall The Amazing Spider-Man Men In Black 3	The Smurfs 2
Twentieth Century-Fox	Ice Age: Continental Drift Life of Pi Prometheus Taken 2	The Croods The Wolverine
Universal Pictures	Ted Les Misérables Snow White and the Huntsman	Despicable Me 2 Fast & Furious 6
Paramount Pictures	Madagascar 3: Europe's Most Wanted	World War Z Star Trek Into Darkness The Wolf of Wall Street G.I. Joe: Retaliation

Source: Box Office Mojo

The dominant position held by large distribution companies in markets outside their home offices has impacts on the screening sector. A common contention between large distributors and owners of theatres is the percentage that distributors claim from each ticket sold. As a result, some theatre chains have refused to screen blockbusters distributed by the U.S. majors.[10]

In many markets, negotiations between large distributors and owners of theatres over the programming of films directly influence the price of tickets paid by spectators and the distribution of gross box office. For example, what a Spanish spectator actually pays for a movie ticket – in 2013 the average price of a ticket was US$8.54 – is allocated as follows: 21% is VAT, 3% goes to intellectual property right management entities and (in highly variable percentages) 33% is for the theatre and 43% for the distributor. However, U.S. majors usually ask for 55% and can even reach 60% (Belinchón, 2014).

[10] In January 2014, the Cinesa and Kinépolis chains (which own 46 cinemas and 500 screens in Spain) refused to screen the movie, *The Wolf of Wall Street*, distributed by Universal Pictures, due to “economically unacceptable conditions” (Morales and Sucasas, 2014).

3. Diversity of feature films

The goods and services derived from cultural industries are, by nature, vehicles of the expression of values, customs, languages, gastronomies, etc. This is the view of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, which states that "cultural activities, goods and services have both an economic and a cultural nature, because they convey identities, values and meanings" (UNESCO, 2005, Preamble).

Since its inception, cinema has been a major vehicle for the cultural expression of nations. This has been complemented from the middle of the last century by television. Feature films – the main industrial product of the sector – can be analysed based on various characteristics: film genres, aesthetics, languages used, ideas expressed, social sectors represented, patterns of behaviour, etc.

This section first analyses the linguistic diversity of feature films, based on data provided by (or estimated from) 54 countries in 2012 and 53 countries in 2013. To that end, the components of variety and balance discussed by Stirling (1988, 2007) in his examination of the concept of diversity are studied. This analysis is followed by a review of the production companies of over 60 countries based on the film categories in the 2014 UIS Questionnaire on Feature Films Statistics: fiction feature films, documentaries and animation movies. Additionally, the distribution of feature films across the three categories (balance) is analysed, taking into account production in 12 countries.

3.1 Language diversity

The Preamble of the UNESCO Convention on the Protection and Promotion of Diversity of Cultural Expressions reads, "Linguistic diversity is a fundamental element of cultural diversity" (UNESCO, 2005). Albornoz and García Leiva (2016) state that advocating linguistic diversity is an imperative for the international community, as every language reflects a one-of-a-kind vision of the world, with its own value system, its specific philosophy and its particular cultural characteristics. A language provides support to an identity and is an essential element of an irreplaceable cultural wealth. Feature films, as well as other cultural expressions, provide a channel of expression and dissemination for approximately 6,000 languages which are spoken in the world.[11]

As several studies have pointed out (Ranaivoson, 2007; UIS, 2011), diversity is a multidimensional concept. Stirling's definition (1998, 2007) of diversity includes a combination of three components: variety, balance and disparity. Variety refers to the number of different categories defined; specifically for films, we may ask, how many languages can be identified in the cinematographic production of a country? Balance refers to the extent to which these categories are represented: what percentages of each language are used in films? And disparity refers to the degree of dissimilarity that exists between the different categories: how different are the languages used? Thus, the larger the number of categories and the more balanced and disparate the categories, the more diverse the system.

[11] It is estimated that approximately one-half of the languages that are spoken today in the world are endangered languages and they may become extinct before the end of the century. 96% of those languages are spoken by 4% of humanity (UNESCO, 2010).

Data on 54 and 52 countries for 2012 and 2013, respectively, show that several countries have produced feature films in several languages (e.g. Spain, Morocco, South Africa and Switzerland) catering to the diversity of their social and linguistic constituents. In other cases, production companies in countries with small populations and minority languages seek a wider dissemination of their products by producing films in languages other than the local one (e.g. Sweden and Slovakia).

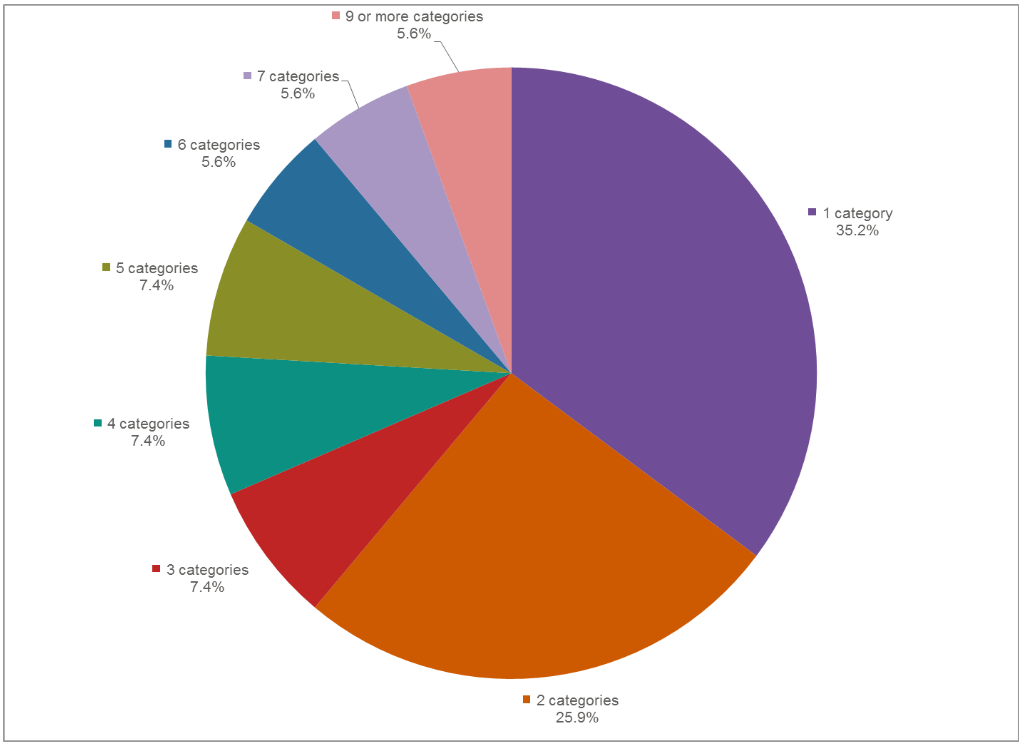
Based on data available in the UIS Data Centre (http://www.uis.unesco.org/datacentre), the diversity of feature films can be analysed by the presence of different linguistic categories, i.e. feature films using one language (monolingual) or a combination of two or more languages (multilingual); a same language may be in more than one category; and ‘other languages’ includes monolingual and/or multilingual films. In 2013, for instance, Armenia produced 28 movies in Armenian, Canada produced 59 movies in English and 34 in French, Chile produced 30 movies in Spanish and one in Italian/English, and France produced 209 movies in French and 61 in ‘other languages’. In these cases, Armenia has one linguistic category while Canada, Chile and France have two linguistic categories each. Additionally, based on these data, Chile has multilingual movies (one feature film), Canada does not have any (they are monolingual movies in English or French), and France may have some (there might be one or more multilingual movies in the ‘other languages’ category).[12]

According to UIS data, in 2012, 35% of the 54 countries had monolingual productions of feature films, while 26% made movies in two linguistic categories *(see **Figure 3**).* That means that in 61% of the countries with data available the use of one or two languages prevailed. In contrast, a minority of countries stated using more than five linguistic categories in their cinematographic productions: six in Spain, Sweden and Switzerland (the three of them including the ‘other languages’ category); seven in Finland (including ‘other languages’), Ireland and Portugal; nine in Slovenia (including ‘other languages’) and the United Kingdom; and – according to data from the Film Federation of India – 35 categories in India.

In 2013 in 52 countries with data available, the share of countries with film productions using a single language dropped to 27%, while the percentage of countries using two linguistic categories rose to 30% *(see **Figure 4**).* In contrast, Ireland, Spain, Sweden and Switzerland shot feature films in six categories (the latter three countries including the ‘other languages’ category); Lithuania, Portugal and South Africa in seven categories; Slovenia in eight (including ‘other languages’); Finland in 10 (including ‘other languages’); the United Kingdom in 11 (including ‘other languages’); and – according to data from the Film Federation of India – 38 categories in India.

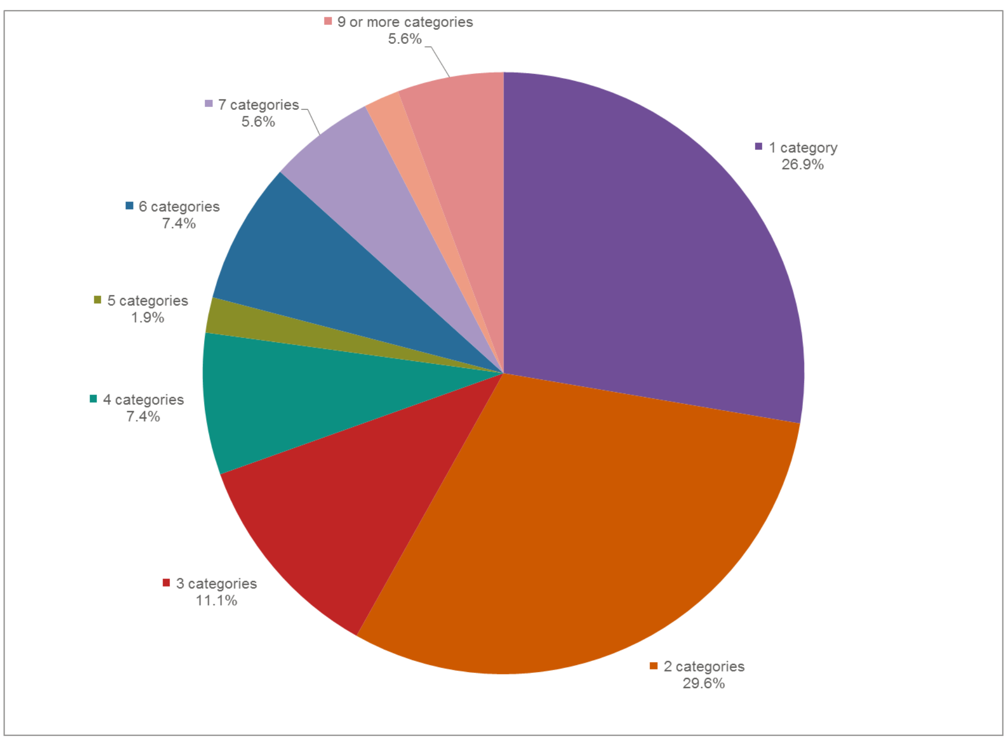
[12] We chose to work with language categories because data are available for each category. We did not work with languages spoken in movies, as we are not aware of the degree of presence in each multilingual film. For instance, in 2013 Irish producers made 28 movies in English, 2 in Irish/English, 1 in Persian, 1 in Russian, 1 in Spanish/English, and 1 in German/English. In this case, we know that Ireland made movies in six linguistic categories, and we have the respective percentage; however, it is not possible to ascertain which percentage corresponds to English.

Figure 3. Number of linguistic categories in feature films by country, 2012*



Note: *Based on data for 54 countries.
Source Based on the UIS database, November 2015, and Film Federation of India data (2012)

Figure 4. Number of linguistic categories in feature films by country, 2013*



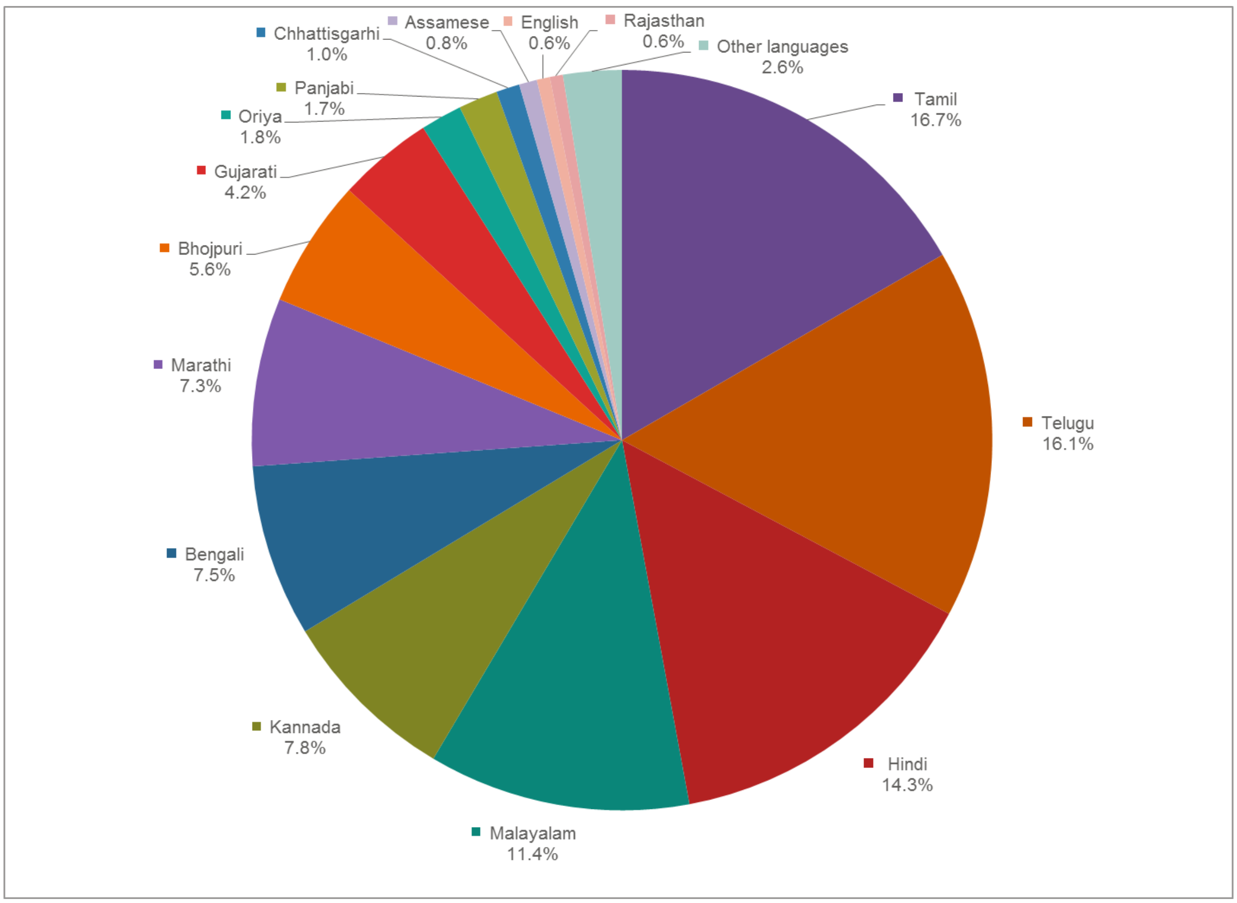
Note: *Based on data for 52 countries.
Source: Based on the UIS database, November 2015, and Film Federation of India data (2013)

Taking into consideration both the variety of languages and the degree of their presence (or balance) (while leaving aside the complex parameter of disparity), India – with 22 official languages and approximately 2,000 unofficial languages – has the world's highest linguistic diversity in its cinematographic production. The films are mainly monolingual, produced in Chennai, Hyderabad, Mumbai and Thiruvananthapuram.

As shown in **Table 5**, of the 3,326 feature films produced in India during the 2012-2013 biennium (1,602 in 2012 and 1,724 in 2013), 554 were in Tamil, 536 in Telugu, 476 in Hindi, 380 in Malayalam, 261 in Kannada, 250 in Bengali, 244 in Marathi, 186 in Bhojpuri and 139 in Gujarati, among others (FFI 2012; 2013).

In spite of its large linguistic diversity, **Figure 5** shows that four languages accounted for 59% of India's film production during the 2012-2013 biennium: Tamil, Telugu, Hindi and Malayalam. However, no one language in India had a share of more than 17 percentage points, which reveals a balance among the languages with a strong presence in film production. In foreign language production, only 19 movies were made in English over the same period.

Figure 5. Languages used in feature films in India, 2012-2013



Source: Based on Film Federation of India data (2012 and 2013)

Table 5. Languages used in feature films in India, 2012 and2013

Language	Region where the language is used	Number of feature films				Balance	
		2012		2013		2012-2013	
Tamil	Official language of Tamil Nadu and Pondicherry. Is spoken by more than 73 million people.	262	16.4%	292	16.9%	554	16.7%
Telugu	Official language of Andhra Pradesh. It is numerically the biggest linguistic unit in India.	256	16.0%	280	16.2%	536	16.1%
Hindi	Official language of Andaman and Nicobar Islands, Bihar, Chandigarh, Chhattisgarh, Delhi, Jariana, Himachal Pradesh, Jharkhand, Madhya Pradesh, Rajasthan, Uttar Pradesh and Uttaranchal.	221	13.8%	255	14.8%	476	14.3%
Malayalam	Official language of Kerala and Lakshadweep.	185	11.5%	195	11.3%	380	11.4%
Kannada	Official language of Karnataka.	128	8.0%	133	7.7%	261	7.8%
Bengali	Official language of West Bengal and Tripura.	123	7.7%	127	7.4%	250	7.5%
Marathi	Language spoken in Maharashtra.	123	7.7%	121	7.0%	244	7.3%
Bhojpuri	Language spoken in the northeast of India in the west side of the state of Bihar, the north part of Jharkhand, and the region Purvanchal of Uttar Pradesh, as well as the south of Nepal.	87	5.4%	99	5.7%	186	5.6%
Gujarati	Language that comes from the state of Gujarat, west of India.	72	4.5%	67	3.9%	139	4.2%
Oriya	Official language of Orissa state.	30	1.9%	30	1.7%	60	1.8%
Punjabi	One of the national languages recognized in India. Official language of Punjab state. Widely used in Delhi and Haryana, where is the second official language in Himachal and Jammu & Kashmir.	26	1.6%	31	1.8%	57	1.7%
Chhattisgarhi	Language spoken in the Indian state of Chhattisgarh	20	1.2%	14	0.8%	34	1.0%
Assamese	Official language of Assam state. Also is spoken in parts of Arunachal Pradesh and other northeast states of India; in Bhutan and Bangladesh.	11	0.7%	15	0.9%	26	0.8%
English	Official language	10	0.6%	9	0.5%	19	0.6%
Rajasthan	Language spoken in Rajasthan and neighbour states of India and Pakistan.	8	0.5%	11	0.6%	19	0.6%
Other languages		40	2.5%	45	2.6%	85	2.6%

Source: Based on Film Federation of India data (2012 and 2013)

In contrast to India and its many languages, films produced in countries that have a single official language, such as the United Kingdom (English) or Slovenia (Slovenian), or in Finland, with two official majority languages (Finnish and Swedish) and several official minority languages (e.g. Sami, Karelian, Livvi, Romani, etc.), used a smaller number of languages in total but made films in languages other than the language of the place of production and, to a lesser extent, produced multilingual content.

Table 6 shows the different linguistic categories for British, Finnish and Slovenian feature films during 2012 and 2013, as well as the degrees of presence of these categories in percentages. The latter enables assessing the balance (or lack thereof) of linguistic categories in these three European countries.

In the United Kingdom, which had a strong domestic market with a gross box office of US$3.4 billion in 2012-2013, monolingual production in the official language (English) has been significant. A few films were targeted to immigrant populations in the country. Of these 22 feature films that did not have English as the only language, 12 still had English as the predominant spoken language.

In contrast, production companies in Slovenia – a small country with 2 million inhabitants – produced 23 feature films during the biennium, of which only 7 (30%) were in Slovenian. The languages used in a large portion of films made in Slovenia connect its historical and cultural ties with some Central European countries and other European countries.

In terms of language, film production in Finland has a more intermediate position compared to the United Kingdom and Slovenia. Of the 98 feature films produced from 2012-2013, 62% were in Finnish and 8% were multilingual feature films including Finnish. 7 films were produced in Swedish, 5 in Estonian and 5 in English.

The data reveal that feature film production was monolingual in 19 countries in 2012 and 13 countries in 2013. With the exception of the United States, with 1,476 films produced in English during the biennium,[13] the large majority of other countries with monolingual production reported producing less than 60 feature films annually. In the latter group, the production in Spanish of six Latin American countries is worth mentioning: Costa Rica, Colombia, Chile, Honduras and Peru in 2012; and Colombia, Costa Rica and Puerto Rico in 2013.

Finally, it should be noted that international dissemination of multilingual films can often be hindered by dubbing policies adopted both for the big screen and television by numerous countries, such as Brazil, China, France, Germany, India, Iran, Italy, Lebanon, Morocco, the Republic of Korea, Spain and Switzerland (COMMIT, 2014).

[13] The information on the U.S. film industry that feeds the UIS database is provided by the MPAA and only considers feature films in the English language. Therefore, there are no data available on films in other languages.

Table 6. Languages used in feature films produced in the United Kingdom, Finland and Slovenia, 2012 and2013

Country	Used language(s)	No. of feature films			
		2012		2013	
United Kingdom (63.1 millions of inhabitants) 553 feature films (2012-2013)	English	308	96.9%	223	94.9%
	Arab	…	…	2	0.9%
	Bengali	1	0.3%	…	...
	Hindi	1	0.3%	1	0.4%
	Italian	…	…	1	0.4%
	Maori	…	...	1	0.4%
	English/Cantonese/Italian	1	0.3%	…	...
	English/Belarusian/Russian	1	0.3%	…	...
	English/Danish	…	...	1	0,4%
	English/Finnish	…	...	1	0,4%
	English/French	2	0,6%	…	...
	English/French/German	…	...	1	0.4%
	English/French/Swahili	…	...	1	0.4%
	English/French/Xhosa	2	0.6%	…	...
	English/Gaelic	1	0.3%	…	...
	English/Kurdish	…	...	1	0.4%
	Russian	1	0.3%	…	...
	Other languages	…	...	2	0.9%
	Total feature films	**318**		**235**	
Finland (5.4 millions of inhabitants) 98 feature films (2012-2013)	Finnish	34	69.4%	27	55.1%
	Danish	…	...	2	4.1%
	Estonian	1	2.0%	4	8.2%
	Finnish/English	…	...	4	8.2%
	Finnish/Swedish	…	...	1	2.0%
	English	3	6.1%	2	4.1%
	Latvian/Finnish/English	…	...	1	2.0%
	Russian	2	4.1%	…	...
	Swedish	2	4.1%	5	10.2%
	Portuguese/English/German	1	2.0%	1	2.0%
	Other languages	6	12.2%	2	4.1%
	Total feature films	**49**		**49**	
Slovenia (2.0 millions of inhabitants) 23 feature films (2012-2013)	Slovenian	2	20.0%	5	38.5%
	Croatian	1	10.0%	1	7.7%
	Czech	1	10.0%	…	…
	Slovenian/German	…	…	1	7.7%
	Slovenian/Bosnian	…	…	2	15.4%
	Slovenian/Danish	…	…	1	7.7%
	Slovenian/English	1	10.0%	…	…
	Slovenian/Italian	1	10.0%	…	…
	Slovenian/Romanian	1	10.0%	…	…
	French	1	10.0%	…	…
	Italian	1	10.0%	…	…
	Italian/Slovenian	…	…	1	7.7%
	English/Slovenian	…	…	1	7.7%
	Other languages	1	10.0%	1	7.7%
	Total feature films	**10**		**13**	

Source: UIS database, November 2015

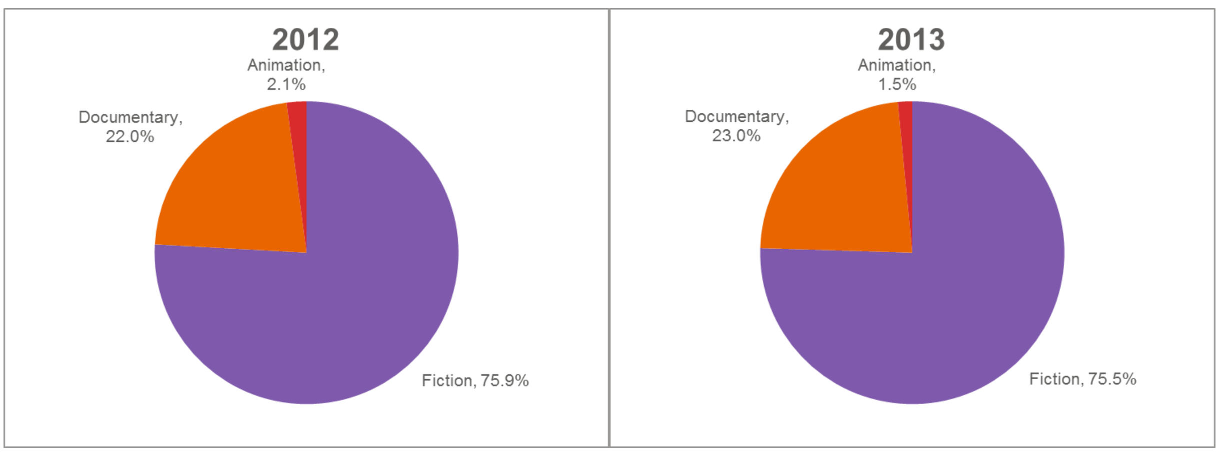
3.2 Diversity of film categories

The 2014 UIS Questionnaire on Feature Film Statistics classifies current film production into three large categories. For the purposes of this report, the categories are not necessarily exclusive and are too broad to enable an assessment of the diversity of film genres at an international or national level. The categories are:

- **Fiction:** A film which uses a narrative construction that is based in part or entirely on events that are not necessarily real.
- **Documentary:** A non-fictional work that generally deals with factual events or attempts to inform the spectator about a reality.
- **Animation:** A technique in which each frame of a film is produced individually, whether generated as a computer graphic, photographing a drawn image, or repeatedly making small changes to a model unit (such as clay animation and stop motion), and then photographing the result with a special animation camera. It includes animated cartoons, puppet films, silhouette films and object animation films.[14]

Within this framework, and according to UIS data[15], fiction feature films undoubtedly had a leading position in 2012-2013. In 2012, 3,892 feature films were disaggregated into the following categories: 76% fiction, 22% documentary, and 2% animation. In 2013, 3,923 feature films were disaggregated into: 76% fiction, 23% documentary, and 1.5% animation *(see **Figure 6**)*.

Figure 6. Movie production by film genres, 2012 and 2013



Source: Based on the UIS database

An analysis of fiction film production shows that in 2012 companies from 64 countries made 2,953 fiction films. The top 4 fiction producers were: the United States (714 films), the United Kingdom (249), France (225) and Germany (144). These countries accounted for 46% of all fiction films. In terms of production volume, they were followed by: Italy (142 films), Spain (108), the Russian Federation (107), Argentina (89), Mexico (76) and Canada (73).

[14] The definitions of the types of films are sourced from the Appendix of the 2014 UIS Questionnaire on Feature Film Statistics.

[15] Unfortunately, the UIS database does not have any data on the production of fiction feature films in large film markets, such as in China, India or Japan, limiting the scope of the analysis.

In 2013, companies from 64 countries produced 2,961 fiction feature films. The top 4 countries were: the United States (727 films), France (226), the United Kingdom (197) and Germany (143), accounting for 44% of total production. They were followed by: Spain (137 films), Italy (133), Argentina (97), Mexico (95), Turkey (82) and Canada/Brazil (77 films each).

In 2012, 54 countries produced 857 documentary feature films. This figure increased by 5.3% in 2013, reaching 902 documentaries made by 52 countries. According to available data, the bulk of documentary production in the biennium under review came from companies based in Western Europe and Latin America[16]. In 2012, the top-ranking producers of documentaries were: the United Kingdom (73 documentaries), Germany (71), (Spain (67), Switzerland (60), Argentina (48), France (42), Mexico (35), Brazil (34), Denmark (32) and Austria (31). These 10 countries accounted for 58% of documentary film production. In 2013, the list had slight variations, with Spain taking the lead with 90 documentary feature films, followed by: Germany (73), Argentina (70), Switzerland (63), Greece (52), Brazil (50), the United Kingdom (44), Denmark/France (38 each) and Italy (32).

While there is no data available for Japan on the production of animated films, it is one of the leading world producers. According to the data available, in 2012, 82 animated films were produced by companies from 20 countries. The top-producing countries were: the United States (24 films), France (12), Spain/Uzbekistan (7 films each) and Germany (5). In 2013, production dropped to 60 animated feature films produced by 20 countries, 65% of which were made by: the United States (11 films), Germany/Uzbekistan (7 each), France (6) and Armenia/Spain (4 each).

Although the share of animated films is low when compared to the other two categories – fiction and documentary – this particular technique is very popular with audiences around the world. As can be seen in Section 4.3 that discusses blockbusters in cinemas, 5 of the 20 most popular feature films of 2012 and 2013 respectively – equivalent to 25% each year – were animated films from the United States.

Based on the information available, it is interesting to analyse the share (balance) of film production from countries that produced films in the three categories in 2012-2013. **Table 7** shows this group of countries and the share of production in each category.

In this group of 12 countries, Armenia stands out for three reasons. First, it is the only country where fiction feature films are not the majority; instead, documentaries represent slightly over 48% of the 52 films made in 2012-2013. Second, its share of animated films is higher than for the other selected countries. Third, Armenia has the best balance of the categories used by the UIS Feature Films Statistics Questionnaire. Therefore, in an assessment of the variety and balance dimensions, Armenian feature films have the highest degree of diversity.

In contrast, Italy and France – countries with historically strong film production traditions – mostly focused on fiction films: 83% for Italy and 82% for France. The rest of the feature films produced in France have a slightly more balanced distribution (15% documentaries and 3.3% animation films) than the rest of Italian films (16% documentaries and 1.2% animation films).

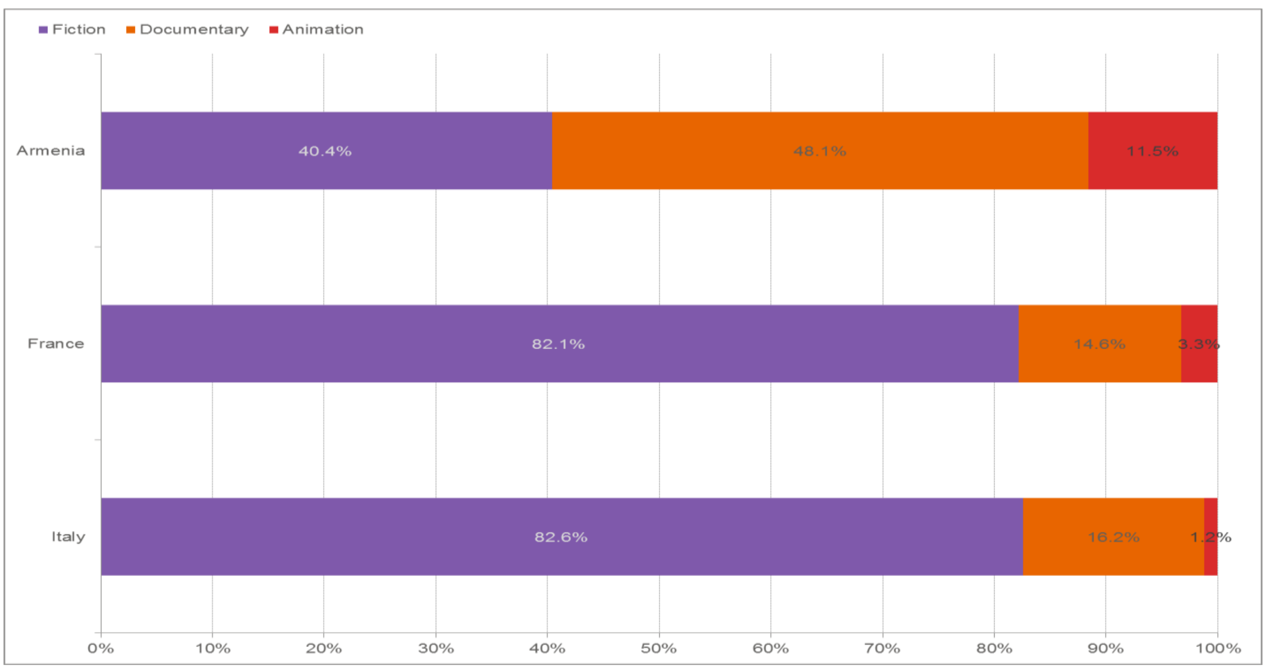
[16] The number of U.S. documentaries is not provided to the UIS, limiting the scope of the analysis.

Table 7. Production of feature films by genre for selected countries, 2012-2013[17]

Country	Total population, 2013 (in millions)	Total number of feature films, 2012-2013	Number of feature films by genre					
			Fiction		Documentary		Animation	
France	64.3	549	451	82.1%	80	14.6%	18	3.3%
Germany	82.7	443	287	64.8%	144	32.5%	12	2.7%
Spain	46.9	413	245	59.3%	157	38.0%	11	2.7%
Italy	61	333	275	82.6%	54	16.2%	4	1.2%
Argentina	41.4	309	186	60.2%	118	38.2%	5	1.6%
Mexico	122.3	238	171	71.8%	65	27.3%	2	0.8%
Brazil	201	212	124	58.5%	84	39.6%	4	1.9%
Finland	5.4	98	61	62.2%	35	35.7%	2	2.0%
Czech Rep.	10.7	91	60	65.9%	29	31.9%	2	2.2%
Kazakhstan	16.4	65	23	35.4%	38	58.5%	4	6.2%
Colombia	48.3	55	40	72.7%	11	20.0%	4	7.3%
Armenia	3	52	21	40.4%	25	48.1%	6	11.5%

Source: Based on the UIS database, November 2015. Brazil demographic data: Instituto Brasileiro de Geografia e Estatística (IBGE)

Figure 7. Balance of feature film production in Armenia, France and Italy, 2012-2013



Source: Based on the UIS database, November 2015

[17] 12 countries of the 68 with data available.

4. Diversity in film consumption

An analysis of diversity from the point of view of cultural goods and services is often understated and overlooked (Napoli, 1999: 24). In audiovisual industries, the practices of those who consume the content are generally limited to their role as consumer audiences. In the case of cinema, spectators are most often counted as purchasers of admissions. That explains the relevance of certain indicators, such as how many spectators have seen a title, how much money is made by the premiere of a feature film or how long a film stays in exhibition rooms.

Only a few countries allocate resources to collect data on the sociodemographic profiles of spectators that go to the cinema, how often they go or how film choices at cinemas vary by individuals and/or social groups over time. Having quantitative and qualitative information on these aspects is fundamental to assess diversity in the consumption of feature films in cinemas.

Based on international data on film consumption in cinemas, China had a prominent role with the highest revenues in 2012 and 2013. The following section includes information on average prices of theatre admissions, a decisive driver of consumption. And finally, it reviews the top 20 films in terms of attendance levels in the world, revealing a majority consumption of action and adventure fiction movies that are supported by large production and promotion budgets at the international level.

4.1 Main consumption markets in theatres

Tables 8 and **9** show the top ten film markets in terms of gross box office in 2012 and 2013. Both tables show a clear dominance of the U.S./Canadian markets due to their size (with more than 350 million inhabitants) and the high frequency of attendance in theatres.

In 2012, this group of ten countries generated US$25.7 billion, equivalent to 74% of the US$34.7 billion collected by theatres all over the world *(see Table 8).* The U.S./Canadian market, which reported a 6% increase compared to 2011, had a share of slightly over 31% of the total revenue raised from the commercial exhibition of films in theatres (MPAA, 2013: 2).

In 2013, the main countries of film consumption collected US$26.9 billion – an increase of almost 4.7% compared to 2012 – representing almost 75% of receipts for films in theatres all over the world *(see Table 9).* This increase of almost five percentage points is backed by the highest revenues reported mainly in China, the Russian Federation, the United States/Canada, India and the Republic of Korea, which offset the decline in France and Australia's gross box offices. The year-to-year growth recorded in the United States/Canadian market was because 68% of the population purchased tickets to watch a film in theatres at least once during the year (MPAA, 2013: 2).

Unquestionably, the rapid and sustained growth in China's gross box office is significant. Since 2012, China has been the world's second-largest consumer of feature films in terms of gross box office. This expansion comes hand in hand with the considerable economic growth experienced over the last decades by the most heavily-populated country in the world.

Table 8. Top 10 markets by gross box office, 2012

Top 10	Country	Population (in million)	Average ticket price (in US$)	GDP per capita	Total gross box office (in billions US$)
1	United States/ Canada	352.3	7.96/ 8.36*	51,749/ 52,219	10.8
2	China	1,377.0	5.75*	6,091	2.7
3	Japan	127.2	15.77	46,720	2.4
4	United Kingdom	62.8	10.83	39,093	1.7
5	France	63.9	8.24	39,772	1.7
6	India	1,236.7	0.60*	1,489	1.4
7	Germany	82.8	9.89	41,863	1.3
8	Republic of Korea	49.0	6.63*	22,590	1.3
9	Russian Federation	143.2	7.59*	14,037	1.2
10	Australia	23.1	13.57	67,556	1.2
			Top 10 total gross box office		**25.7**

Note: * UIS estimate.
Sources: Based on the UIS database, November 2015 and MPAA (2013: 4-5), based on IHS Screen Digest, local sources. Demographic data: UIS demographic indicators

Table 9. Top 10 markets by gross box office, 2013

Top 10	Country	Population (in million)	Average ticket price (in US$)	GDP per capita**	Total gross box office (in billions US$)
1	United States/ Canada	355.1	8.13/ 8.10*	51,749/ 52,219	10.9
2	China	1,385.6	5.74*	6,091	3.6
3	Japan	127.1	12.77*	46,720	2.4
4	United Kingdom	63.1	10.9	39,093	1.7
5	France	64.3	8.57	39,772	1.6
6	India	1,252.1	0.81*	1,489	1.5
7	Republic of Korea	49.2	6.64*	22,590	1.4
8	Russian Federation	142.8	7.55*	14,037	1.4
9	Germany	82.7	10.71	41,863	1.3
10	Australia	23.3	12.95	67,556	1.1
			Top 10 total gross box office		**26.9**

Note: * UIS estimate; ** For year 2012.
Sources: analysis of the UIS database, November 2015 and MPAA (2013: 4-5), based on IHS Screen Digest, local sources. Demographic data: UIS demographic indicators

As Roque González points out, "between 2005 and 2011, China's gross box office grew by an average of 43% per year (50% during the 2008-2011 period)" (UIS/González, 2013: 25). Furthermore, the receipts in 2012 were 17% higher than in 2011, and the receipts in 2013 were 33% higher than in 2012, going from US$2.7 billion to US$3.6 billion (59% of this amount was from receipts of national films). The data for 2014 indicate that revenues have exceeded US$4.3 billion, and today specialists in the film industry foresee that in the near future the Chinese market will outdo the United States/Canadian one (Brzeski, 2015; Child, 2015).

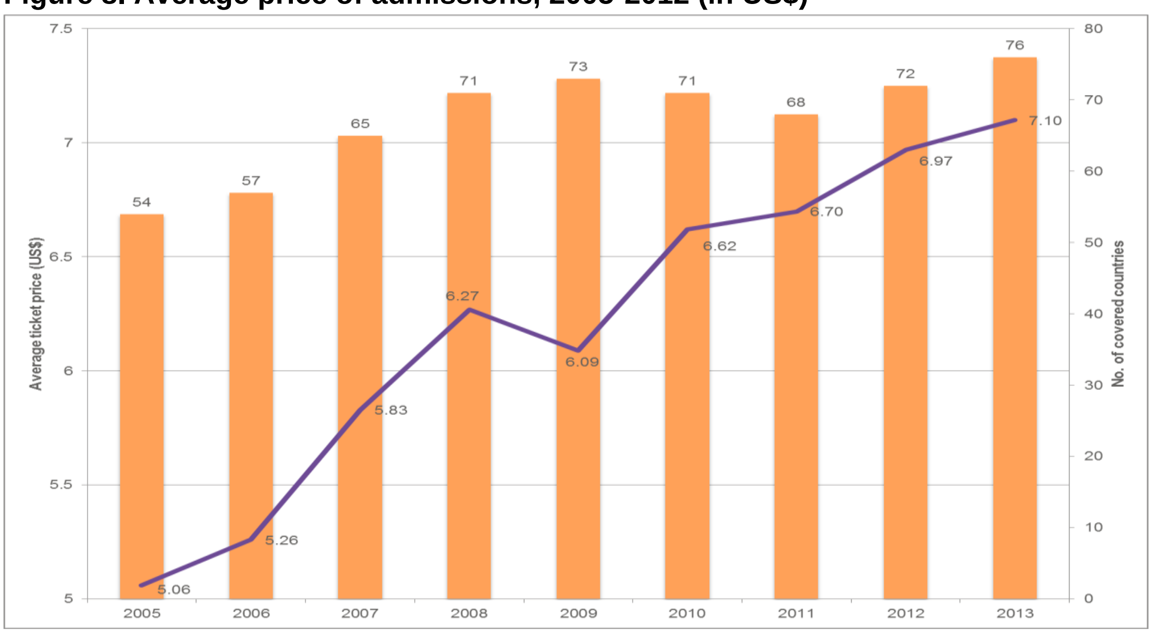
The top ten countries in terms of gross box office during the 2012-2013 biennium are not necessarily the same as the top countries where most admissions were sold. Although India sold the highest number of tickets (2.6 billion), its low ticket prices in comparison to the highest-grossing countries places it in the middle of Tables 8 and 9 instead of the top (McCarthy, 2014). Other countries with the highest number of tickets sold in 2012 were: the United States (1.4 billion), China (470 million) and Japan (155.1 million).

4.2 Average price of admissions

Aspects that are closely linked with feature film consumption in theatres is the price of admissions and the purchasing power of the population. High admission prices jointly with the extensive offering of audiovisual contents of all kinds (including feature films) available through various channels and devices are key factors in the decision whether or not to go to the cinema, and in the choice of film.

In 2012, the average price of admissions to movie theatres was US$6.97, while in 2013 the average price recorded an increase of 1.9%, at US$7.10 *(see **Figure 8**)*. These averages include different prices charged for admission: on weekends and holidays, attendance rises and consequently prices are higher than during weekdays. Additionally, admissions to attend the screening of 3D and UltraAVX feature films are usually more expensive than regular projections.

Figure 8. Average price of admissions, 2005-2012 (in US$)



Source: UIS database, October 2015

To stimulate consumption in theatres, in various markets there are discounted prices on certain days of the week ('spectator days') or at specific times of the day (morning or late shows). Additionally, there are multiplexes that offer monthly and/or annual subscriptions that entitle subscribers to view as many sessions as they wish. So, for instance, it is estimated that monthly subscriptions for €20 may represent 25% of the number of tickets sold every year in Paris (García, 2013).

As can be seen in **Figure 8**, during the 2005-2013 period, there was a 40% increase in the average price of admissions to theatres. Furthermore, the UIS database shows that there have been major price variations across countries: while in 2013 a spectator in Senegal paid US$0.56 to go to the movies (US$0.54 in 2012), a resident of Bahrein paid US$17.48 (US$17.10 in 2012).

Differences in admission prices can be significant within a country, such as Spain. In 2012, the highest price of admission to a theatre was in Barcelona (Catalonia): €8.49 during workdays, followed by A Coruña (Galicia), Alicante (Valencia) and Oviedo (Asturias), where going to the cinema cost €8.40 on average. In contrast, the lowest average prices on weekdays were found in: Melilla (€5.00), Granada (Andalucía) (€5.75), Cáceres, (Extremadura) (€5.80) and Golmayo (Castile and León) (€5.85) (FACUA, 2012).

4.3 Attendance of the top feature films

As mentioned extensively by film industry experts, most of today's film consumption is outside the traditional cinema circuit. Televisions, streaming media players, computers, tablets and smartphones are popular platforms for watching and enjoying feature films for a major portion of the world's population. However, the theatrical release of a feature film continues to be a major effort vis-à-vis commercial exploitation in the rest of the film consumption windows (free-to-air and pay television, DVD, online platforms).

Analysis of the most-viewed feature films in theatres globally during 2012 and 2013 reveals, once again, the strong dominance of blockbusters from large Hollywood production and distribution companies. These films are almost entirely in English, supported by large budgets that are allocated in the first place to production and secondly to promotion in the so-called 'market' (United States/Canada) and foreign markets.

In line with what was pointed out in previous reports commissioned by the UIS, the top films in terms of theatre attendance include products for young adults and children. These are animation and action/adventure films, often in 3D or UltraAVX.

The ranking of the top 20 feature films in terms of attendance levels in the world, presented in Tables 10 and 11, uses a weighted score to classify films according to their popularity with audiences from different countries. To prepare this ranking, the UIS gathers information on the ten feature films with the highest attendance levels every year in each country (based on admissions sold and, in a few cases, the gross box office per film) and subsequently applies a weighted score to calculate the total count of points per country.

Table 10 shows weighted scores of the top 20 feature films screened in 2012. The range of weighted scores for the top 20 goes from 355 points obtained by the animation film *Ice Age: Continental Drift* (United States), which ranked in the top 10 in 47 countries, to 21 points obtained by *Mission Impossible: Ghost Protocol* (United States/United Arab Emirates), listed on the top 10 of three countries. The ranking of the most-viewed feature films in theatres during that year shows a prevalence of new episodes of franchises from different series (*James Bond, Ice Age, Twilight, Spider-Man, Madagascar,* etc.) and adaptation to the big screen of stories originally created for comics (Marvel's *The Avengers, The Dark Knight*).

Table 10. Top 20 feature films in terms of theatre attendance levels, 2012

Title	Weighed score	Number of countries in Top 10	Origin	Genres	Language	Production budget (in million US$)*	Sequel/ franchises
Ice Age: Continental Drift	355	47	US	Animation, adventure, comedy	English	95	Franchise (series: Ice Age)
Skyfall	342	43	UK/US	Action, adventure, mystery	English	200	Franchise (series: James Bond 007)
The Twilight Saga: Breaking Dawn Part 2	256	43	US	Adventure, drama, fantasy	English	120	Franchise (series: Twilight)
Madagascar 3: Europe's Most Wanted	251	41	US	Animation, adventure, comedy	English	145	Franchise (series: Madagascar)
Marvel's The Avengers	251	39	US	Action, adventure, Sci-Fi	English (Russian)	220	Franchise (series: Marvel Cinematic Universe films) Comic adaptation
The Dark Knight Rises	250	47	US/UK	Action, mystery	English	250	Franchise (series: The Dark Knight Trilogy) Comic adaptation
The Hobbit: An Unexpected Journey	173	34	US/NZ	Adventure, fantasy	English	180	Sequel (series: The Hobbit)
The Amazing Spider-Man	101	20	US	Animation, adventure, fantasy	English	230	Franchise (series: Spider-Man) Comic adaptation
Brave	75	18	US	Animation, adventure, comedy	English	185	--

The Intouchables	70	10	FR	Biography, comedy, drama	French	9.5	--
Ted	66	17	US	Comedy, fantasy	English	50	Sequel (Ted 2, in 2015)
The Hunger Games	43	9	US	Adventure, drama, Sci-Fi	English	78	Franchise (series: The Hunger Games)
Puss in Boots	32	7	US	Animation, adventure, comedy	English/ Spanish	130	--
Hotel Transylvania	27	9	US	Animation, comedy	English	85	Sequel (Hotel Transylvania 2, in 2015)
Taken 2	27	6	FR	Action, crime, mystery	English (Turkish, Arab)	45	Franchise (series: Taken)
Men in Black 3	26	8	US/UAE	Action, comedy, Sci-Fi	English	225	Franchise (series: Men in Black)
American Reunion	24	8	US	Comedy	English	50	Franchise (series: American Pie)
Life of Pi	22	5	US/ASI	Adventure, drama, fantasy	English/ Tamil/ Hindi (Chinese, Japanese, French)	120	--
The Dictator	22	6	US	Comedy	English/ Hebrew	65	--
Mission: Impossible – Ghost Protocol	21	3	US/UAE	Action, adventure, mystery	English/ Russian/ French/ Arab/ Swedish	145	Franchise (series: Mission: Impossible)

Notes: * Estimates.
ASI: Asian country; FR: France; NZ: New Zealand;; UAE: United Arab Emirates; UK: United Kingdom; US: United States.

Sources: UIS, October 2015. Origin: European Audiovisual Observatory, Lumière database (http://lumiere.obs.coe.int/). Budgets and genres: Internet Movie Database (www.imdb.com)

The top 20 most popular feature films at the international level for 2012 comprises a majority of films produced in the United States (12 of 20 feature films) or co-produced by U.S. companies (6 of 20 feature films): the productions and co-productions from the United States account for 90% of the films with the highest theatrical attendance levels that year. Only two French productions, *The Intouchables*, in the 10th position, and *Taken 2*, in the 15th position, bear witness to the minority consumption of feature films produced by companies from other countries.

Regarding estimated budgets[18] of the top 20 most-viewed films of 2012, five films cost US$200 million or more – the most expensive film in this group was the U.S./UK co-production, *The Dark Knight Rises* – while seven films had budgets between US$100 million and US$199 million. That is, 60% of feature films cost US$100 million or more. On the other hand, six films had budgets between US$50 million and US$99 million, and only two productions did not exceed US$50 million. The only exception to these high budgets was the French comedy, *The Intouchables*, with a US$9.5 million budget.

The most-viewed movie, *Ice Age: Continental Drift*, an animation produced by Blue Sky Studios and Twentieth Century Fox, had a budget of US$95 million and earned in the first weekend of its theatrical release in the United States more than US$46.6 million.

Furthermore, a look at the languages used in the top 20 most popular films of 2012 reveals that there is a clear and almost undisputed predominance of the English language. Once again, the exception to the rule was *The Intouchables,* shot in French.

Table 11 shows the weighted scores of the top 20 most popular feature films in 2013. The range of weighted scores of the top 20 goes from 354 scores obtained for the animated film, *Despicable Me 2* (United States), which ranked in the top 10 of 49 film markets, to the 18 points obtained by *Life of Pi* (United States/China, Taiwan), which was listed in the top 10 of five markets. An analysis of the most-viewed feature films in theatres during that year reveals a continuity of the supremacy of franchises from different series: Walt Disney Animation Studios, Iron Man, Despicable Me, The Hobbit, The Hunger Games, etc.

The ranking of the top 20 feature films most-viewed in the world in 2013 only lists films that were either produced (12 of 20 feature films) or co-produced (8 of 20 feature films) by U.S. companies. These data confirm once again the preference of spectators for Hollywood productions and reveal the commercially successful co-production strategy of U.S. companies with markets that have cultural and linguistic compatibility (the United Kingdom or New Zealand) or with non-traditional markets (China).

[18] As of the 2008 issue of its report *Theatrical Market Statistics*, the MPAA ceased to show 'negative costs' (production costs, general expenses and financial interest) separately from 'marketing costs' (printouts and advertising) when reporting on average costs of motion pictures released by the majors. However, it is estimated that the large Hollywood studios have considerably increased in recent years the investment in the promotion of their movies, in both the domestic and foreign markets (McClintock, 2014).

Table 11. Top 20 feature films in terms of theatre attendance levels, 2013

Title	Weighed score	Number of countries in Top 10	Origin	Genres	Language	Production budget (in million US$)*	Sequel/ franchises
Despicable Me 2	354	49	US	Animation, comedy, family	English	76	Franchise (series: Despicable me)
Iron Man 3	271	40	US/CH	Action, adventure, Sci-Fi	English	200	Franchise (series: Iron Man) Comic adaptation
The Hobbit: The Desolation of Smaug	247	33	US/NZ	Adventure, fantasy	English	225	Franchise (series: The Hobbit)
Fast & Furious 6	243	39	US	Action, crime, thriller	English (Russian, Spanish, Indonesian)	160	Franchise (series: Fast & Furious)
The Smurfs 2	146	26	US	Animation, adventure, comedy	English/French	105	Franchise (series: The Smurfs)
The Hunger Games: Catching Fire	137	24	US	Adventure, Sci-Fi, thriller	English	130	Franchise (series: The Hunger Games)
Monsters University	129	24	US	Animation, adventure, comedy	English	200	Franchise (series: Monsters, Inc.)
Frozen	121	25	US	Animation, adventure, comedy	English (Icelandic)	150	--
The Croods	114	26	US	Animation, adventure, comedy	English	135	--
The Hangover Part III	103	18	US	Comedy	English	103	Franchise (series: The Hangover)

Thor: The Dark World	85	16	US	Animation, adventure, fantasy	English	170	Franchise (series: Marvel Cinematic Universe; Series: Thor) Comic adaptation
Django Unchained	55	9	US	Western	English/ German (French)	100	--
Man of Steel	54	13	US/CA/ UK	Animation, adventure, fantasy	English	225	Sequel (Batman vs. Superman: Dawn of Justice, 2016)
Gravity	46	14	US/UK	Sci-Fi, thriller	English/ Greenlandic	100	--
World War Z	33	10	US	Action, adventure, horror	English (Spanish, Hebrew, Arab)	190	--
Now You See Me	29	6	US	Crime, mystery, thriller	English (French)	75	Sequel (Now You See Me 2 in 2016)
Les Misérables	27	5	UK/US	Drama, musical, romance	English	61	--
The Hobbit: An Unexpected Journey	24	6	US/NZ	Adventure, fantasy	English	180	Sequel (series: The Hobbit)
We're the Millers	19	5	US	Action, adventure, comedy	English (Spanish)	37	--
Life of Pi	18	5	US/ASI	Adventure, drama, fantasy	English/ Tamil/ Hindi (Chinese, Japanese, French)	120	--

Notes: * Estimated.
CA: Canada; CH: China; NZ: New Zealand; ASI: Asian country; UK: United Kingdom; US: United States.

Sources: UIS, October 2015. Origin: European Audiovisual Observatory, Lumière database (http://lumiere.obs.coe.int/). Budgets and genres: Internet Movie Database (www.imdb.com)

Of the 20 most popular films in 2013, 80% had a budget of US$100 million or more. The two most expensive films in this set were two co-productions with U.S. majors at the helm: *The Hobbit: The Desolation of Smaug* (Metro-Goldwyn-Mayer and New Line Cinemacon, New Zealand companies) and *Man of Steel* (Warner in partnership with Canadian and British companies). Each of these films had a budget of approximately US$225 million. Only four of the 20 highest-grossing films that year (20%) had budgets below the US$100 million mark. This group includes the movie with the highest gross box office that year, *Despicable Me 2*, from Universal Pictures, which – with a budget of roughly US$76 million – reported receipts over the weekend of its theatrical release in the United States of over US$83.5 million.

Again, the 20 most popular feature films of 2013 evidence a very clear predominance of the English language and consequently a lack of linguistic diversity in content. Only on rare occasions have languages, including French, German or Greenlandic, complemented the English language in the stories told.

5. Conclusion

Based on data collected from 97 countries through the UIS 2014 Survey on Feature Film Statistics, the following observations on diversity can be made:

Diversity of film sources

- In 2012, the number of feature films greatly increased throughout the world, and the following year a new production record was hit: 7,610 movies. However, the sustained growth of global production during the 2005-2013 period has not undermined the weight of the main production countries: India, the United States, China, Japan and a set of Western European countries, including the United Kingdom, France, Germany and Spain. This finding, in the attempt to analyse the diversity of sources, reveals a high degree of concentration of production in the economic superpowers and in some of the most heavily-populated countries of the world.

- A special case in point is India, the country with the second-largest population, and the number-one filmmaking country, which is experiencing a major growth in production. India produced 1,041 movies in 2005 to 1,724 movies in 2013. The number of feature films produced in 2013, mostly with digital technology and at multiple sites, represented over one-fifth of worldwide production.

- International feature film co-productions, driven by the public sector and private production companies, were common in some countries of Western Europe and the United States. France had the largest number of co-productions in the 2012-2013 biennium. Production companies view co-productions with companies from other countries as a means of taking advantage of the filmmaking grant programmes of various countries and of extending the reach of films.

- Increased production does not necessarily lead to a better and larger dissemination of films. The dominant positions of the U.S. majors in many markets directly impact the diversity offered, i.e. what content reaches the screens and how. For instance, the European space, comprising countries with a prominent tradition for production, repeatedly expresses the lack of reach of its feature films across borders.

Diversity of feature films made

- Most countries have monolingual (in their respective official languages) or bilingual film production. Again, India stands out for the wide spectrum of local languages in its movies, none of which has a share over 17%.

- In countries with multilingual film production, there are one or several drivers for this: a historical presence of different social groups within the country and/or large migrant groups, geo-cultural proximity with companies speaking other languages, and the development of strategies for commercial penetration in new markets, among others.

- Dubbing policies implemented by countries are unfavourable for the recognition of languages other than those of the place where foreign films are screened.

- According to the three categories in the UIS 2014 Questionnaire on Feature Film Statistics, there is a clear pre-eminence of fiction feature films versus documentaries and animation movies. Additionally, all countries offering information on the production of fiction, animation and documentary feature films show a clear imbalance among the categories.

Diversity of feature film screenings

- There is a strong geographic concentration of the revenues from the commercial screening of feature films in theatres. The top 10 markets, led by the United States/Canada, China and Japan, held three-fourths of global revenues during the 2012-2013 period.

- China, the most heavily-populated country in the world, is seeing a sustained increase in its gross box office for feature films in theatres (in 2013, it exceeded US$3.6 billion). It appears that the world's second film market in terms of gross box office is ready to overcome, in the near future, the stagnated market of the United States/Canada.

- India, with average ticket prices well below those prevailing in the top revenue markets, is the top country in terms of volume of tickets sold. In 2012, Indian theatres received more theatregoers than the United States, China and Japan together.

- Even though there are noticeable differences between countries and inside countries at the global level during 2012 and 2013, the average price of theatre tickets continued to grow. The 2005-2013 period saw an increase of 40% in the average ticket price.

- The most popular feature films watched in theatres in 2012 and 2013 confirm a very high concentration of consumption of blockbusters produced (or co-produced) and distributed by U.S. majors. They are mostly action/adventure movies, some with animation techniques, targeting children and adolescents, supported by multi-million budgets and international advertising campaigns.

- As has been the case in recent years, mass consumption of feature films in theatres has favoured the franchises of various series and bringing to the big screen stories that were originally created as comics.

The international filmmaking industry faces some shortcomings regarding diversity in its sources, some of the characteristics of films made and the majority consumption of feature films. Therefore, it is imperative to strengthen and renew some public policies and civil society strategies with the aim to strengthen diversity in (and of) the filmmaking industry. Policies should address the complex and changing relationship of the film industry with the audiovisual sector and cultural industries in general.

The principle of equitable access upheld by the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions states: "Equitable access to a rich and diversified range of cultural expressions from all over the world and access of cultures to the means of expressions and dissemination constitute important elements for enhancing cultural diversity and encouraging mutual understanding." (UNESCO, 2005: Article 2.7). Making this principle a reality involves diversifying and strengthening the fabric of feature film production centres, changing the structures governing the distribution of films at international scale, and implementing policies to encourage diversified film consumption.

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