



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE

Female directors in European films

State of play and evolution
between 2003 and 2012

Julio Talavera Milla
European Audiovisual Observatory



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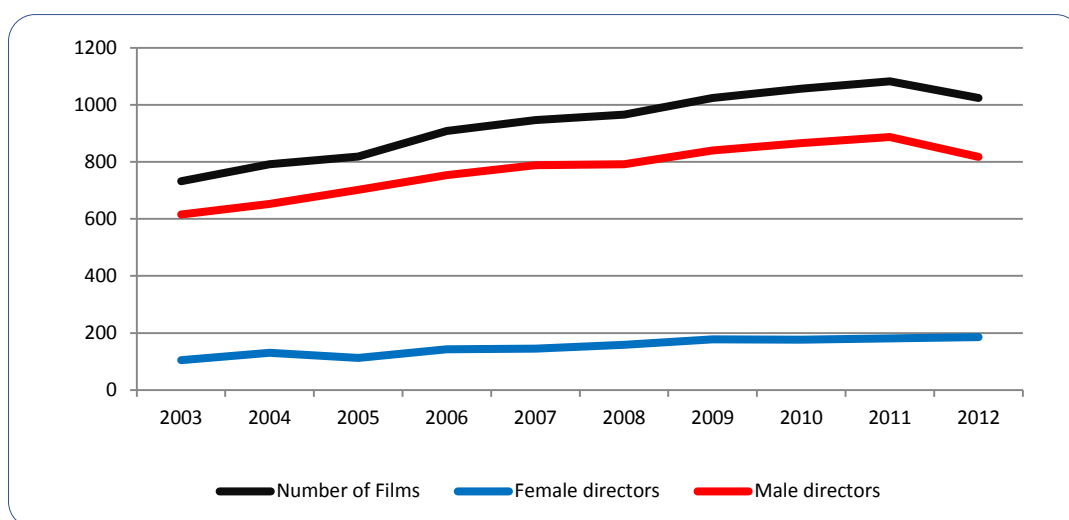
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1.1 Executive summary

This first-of-its-kind pan-European analysis of films by female directors has been produced using LUMIERE, the European Audiovisual Observatory's database on cinema attendance in European markets. The study draws on 9 072 European films produced and released between 2003 and 2012, accounting for 3 192.19 million admissions in Europe. The analysis has been carried out looking at two main indicators: the number of films and the number of admissions considering a series of variables, namely: year of production, nationality of the production, gender of the director, type of production and country of release. The report is divided into three sections: in the first, the state of play is presented and the methodology of the report is explained; in the second, the European production market is considered as a whole, in the third each country is considered independently and national realities will be contrasted.

The second section reveals a significant gender divide both in terms of volume of production and admissions. Only 16.3% of the films analysed between 2003 and 2012 were directed by women; there were no significant highs and lows during this period, with the percentage of female directors ranging between a peak of 18.1% in 2012 and a low of 13.7% in 2005.

Figure 1 Number of European films released by gender of the director and year of production
By number of films

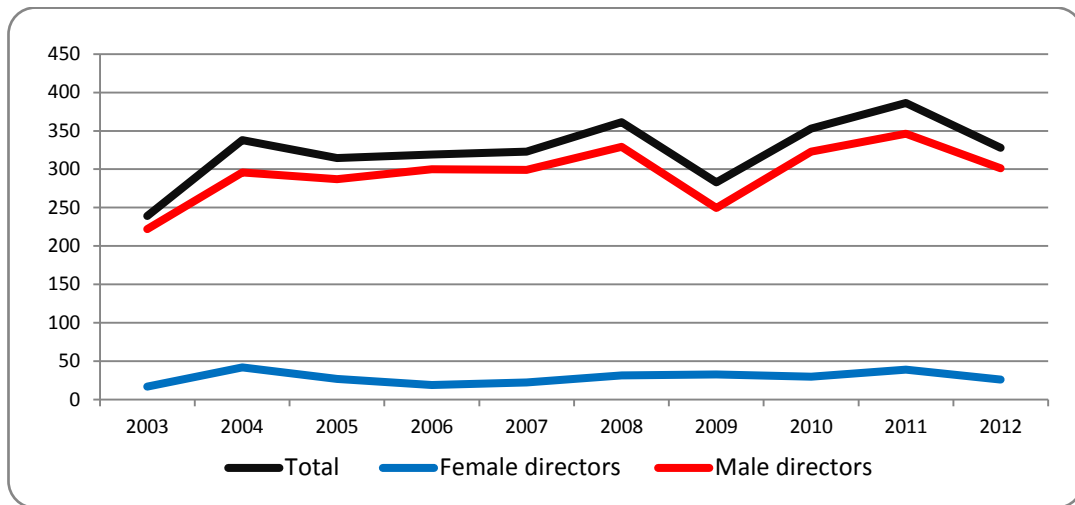


Source: OBS LUMIERE

If we compare the first and the last five years of the series we can see that the volume of films by female directors increased by 35.7% from the 2003 to 2007 period, to the 2008 to 2012 period, compared to a 16.5% increase for films by male directors. This means that, should this growth remain constant, 51 years would pass before the production volume of directors of each gender evened up.

As far as film attendance is concerned, the share of admissions to films by female directors is more limited, with films by female directors accounting for just 8.9% of total admissions over the same period. In this case, however, the highs and lows over time are slightly more marked, with admissions to films by female directors ranging between a peak of 12.4% in 2004 and a low of 5.9% in 2006. It should be noted that the most successful European film by a female director during the period under analysis, "Bridget Jones: The Edge of Reason", was shot in 2004. In any case, if we eliminate the top 1% of films by directors of either gender from the sample analysed we can observe only marginal shifts in the status quo as far as both indicators are concerned.

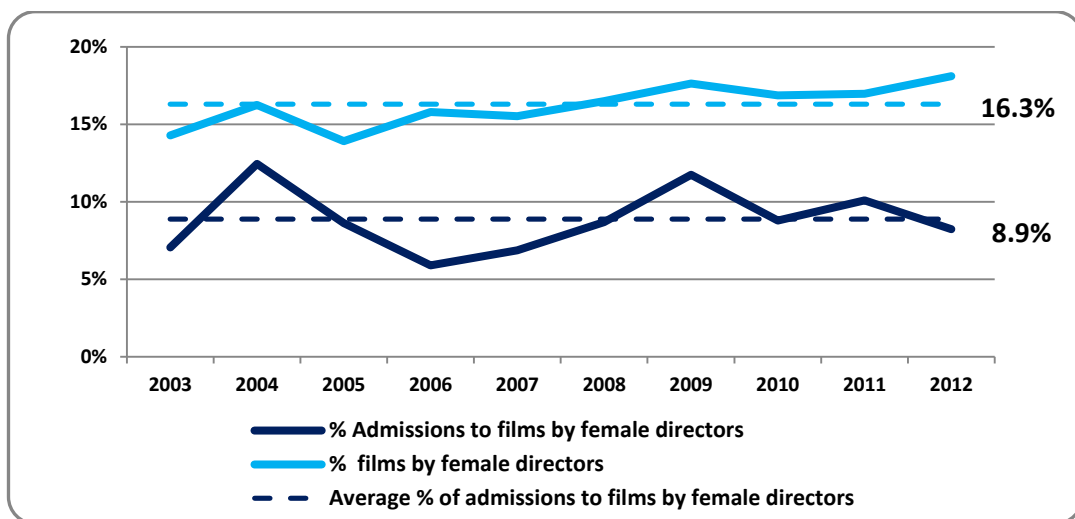
Figure 2 Admissions to European films by gender of the director (2003-2012)
In millions



Source: OBS LUMIERE

In any case, were the 5-year-on-5-year growth rate of admissions to films by male (6.8%) and female directors (23.7%) from 2003 to 2007 and from 2008 to 2012 remain constant, it would take over 75 years to close the admissions gap by gender of the director. Furthermore, the relative weight of films by female directors both by production volume and number of admissions is and continues to be quite marginal, as shown in the following graph.

Figure 3 Comparison of share of films and share of admissions by gender over time (2003 to 2012)
As a percentage



Source: OBS LUMIERE

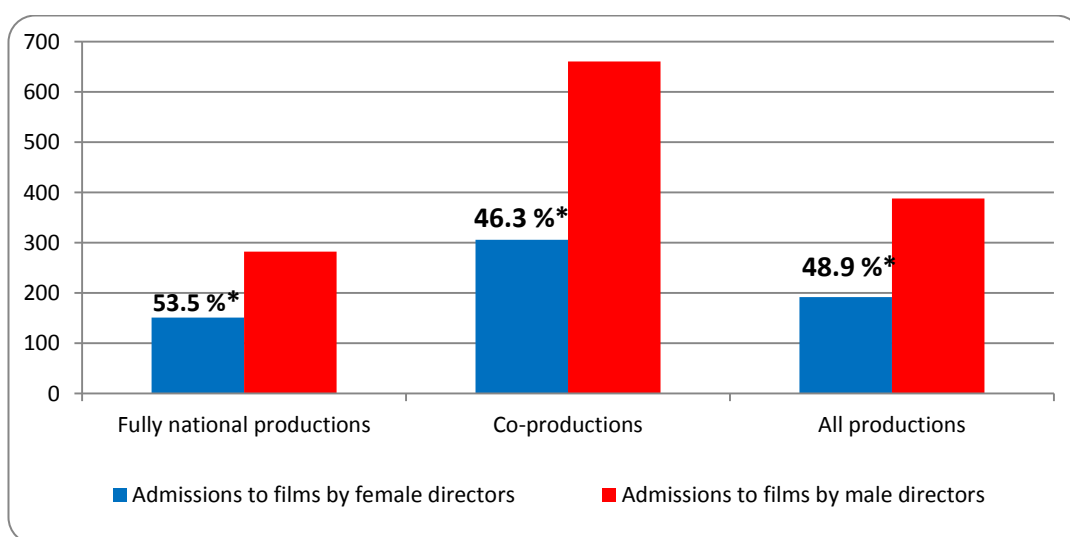
The average performance of European films in European theatres was 351 873 admissions per film over the period 2003 to 2012, with films by a male director accounting for 388 097 admissions per film compared to 191 954 admissions per film by a female director. In other words, the average film by a male director recorded slightly more than twice the number of admissions (2.02) than the average film by a female director. Furthermore, most films performed below average, with a few outliers at the top of the list by admissions being responsible for this. In addition, films by female directors were much more dispersed throughout the ranking by admissions than films directed by their male

counterparts.

However, these figures are far from the median values for films with participation of directors of either gender, which were 41 178 admissions for films with a male director and 20 851 admissions for films with a female director; the median figure for the 9 072 films analysed being 37 211 admissions per film. An average value much higher than its respective median confirms that an important part of the admissions come from a few outliers at the top of the list; or looking at it the other way round, that the vast majority of productions performed well below average.

After this, the report analyses what impact the gender of the director may have in terms of whether the film is a national production or an international co-production, as well as in terms of the type of release (local v. foreign). The share of international co-productions according to gender of the director was quite similar over the period between 2003 and 2012: 26.3% of the films directed by women had some level of foreign financial investment compared to 28% of films by male directors, a difference of just 1.7%; what is of particular note, however, is that the gap according to gender of the director widens when we look at the share of admissions to international co-productions. This figure stands at 41.7% for films by female directors (119.12 million admissions) as opposed to 46.9% for those films directed by men (1 384.50 million admissions) – a gap of 5.2%. As has been often suggested by some sectors of the industry, this may be due to the lower profile of films directed by women, who would have access to lower budgets and who would see a smaller investment in promotion and marketing; consequently, their films would generate a lower turnover at the box office. Nonetheless, the lack of comprehensive budget figures for the films analysed makes it impossible to substantiate this argument.

Figure 4 Average admissions per European film by type of production and gender of the director (2003 to 2012)
In thousand admissions



Source: OBS LUMIERE

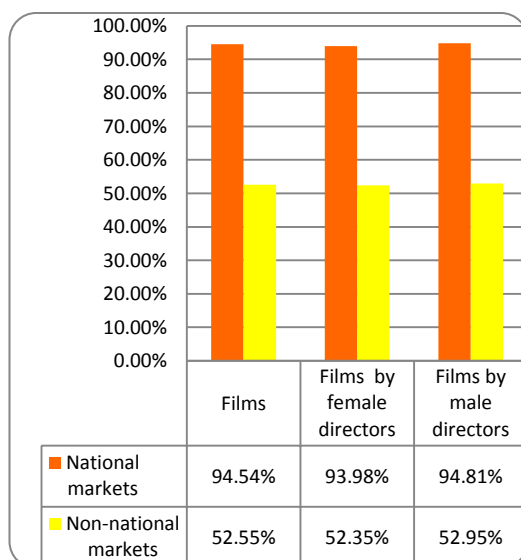
* Average admissions/film by female directors expressed as a percentage of the average admissions/film by male directors of the corresponding category

As far as theatrical release is concerned, most European films were released domestically, but only 52.8% of them were released internationally within Europe between 2003 and 2012, with no relevant relative difference to be observed according to gender; the share of films with at least one foreign release in Europe in the period under analysis was 52.5% for films with female directors and 53.2% for films by male directors. Again, it is when looking at the share of admissions that we can find a difference, with 29.4% of tickets sold for films by female directors coming from non-national European markets as compared to 36.7% in the case of films by male directors. Despite a difference of just

0.73% between the international distribution in Europe of films by female and male directors, the gender divide increases to 7.3% when looking at the share of admissions per gender in the markets concerned

Figure 5 Share of European films by release territory within each gender category (2003 to 2012)

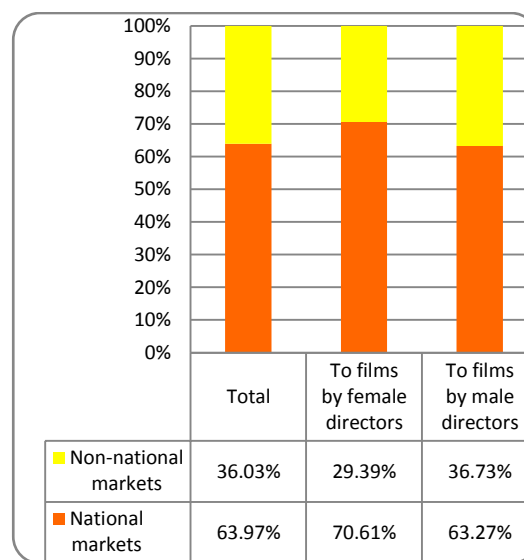
As a percentage



Source: OBS LUMIERE

Figure 6 Share of admissions to European films by release territory within each gender category (2003 to 2012)

As a percentage



Source: OBS LUMIERE

In terms of relative weight, the share of films by female directors was identical in national and foreign markets: 16.2%. However, only 7.3% of admissions in foreign markets came from female-directed films as compared to 9.7% in domestic markets.

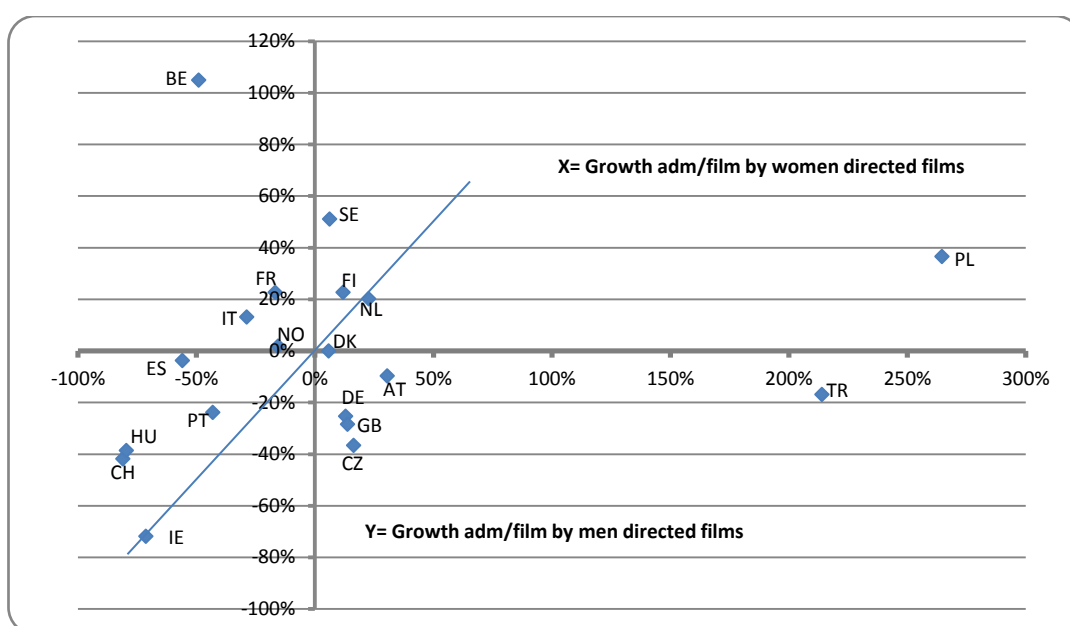
In order to compare the highest-grossing productions by directors of either gender a percentage (1% in this case) rather than a fixed number of films will act as the sample of the analysis; therefore the 75 (approximately 1% of the total 7 479 films in this category) best-performing films by male directors have been compared to the 15 (approximately 1% of the 1 479 films in its category) highest-grossing productions by their female counterparts. The top 1% of films by male directors represented 38.3% of admissions to films within this category as compared to only 23.7% in the case of films directed by women, thereby showing a much higher concentration of admissions at the top of the list of films directed by men.

Furthermore, 48.2% of admissions to these top films by female filmmakers came from foreign markets, whereas the figure was 57% when it came to top films by their male counterparts. It is of particular note that the gender gap widened at the top for this indicator, meaning that the share of admissions for films by female directors is even weaker at the top than on average, with the gap by average admissions per film drastically increasing at the top, close to 1:3.55, female:male.

The third part of our analysis will show that those countries with the largest industries in absolute terms according to production volume and the markets with more admissions to films by female directors are not at the top of the rankings by relative weight, that is, by share of films and admissions to films by female directors. The countries with the highest production volumes and attendance levels for films by female directors are the medium-size production countries; in fact, the proportion of female directors in terms of either number of films produced or admissions in most of the largest production countries was below the overall European average.

The measurement of any kind of growth in this section was done on a 5-year on 5-year basis during the period from 2003 to 2012; that is to say, by contrasting the results for the period from 2003 to 2007 with those for the period from 2008 to 2012. More countries grew in terms of number of films than by numbers of admissions between these periods. Moreover, growth in terms of number of admissions was more moderate than growth in terms of numbers of films for both gender categories. European films grew by 19.47% whereas the numbers of admissions grew by only 8.3% over the same period. European films by female directors increased well above these rates (35.7% more films and 23.6% more admissions). The difference in growth for either indicator reflects a decrease of average admissions per film for both gender categories. As a matter of fact, the performance of films by women decreased (slightly) more (by 8.9%) than the performance of films by men (by 8.5%), very close to the break-even point, representing a marginal shift of the status quo in terms of performance in favour of male directors.

Figure 7 Evolution of the performance by gender of the director (from 2003-2007 to 2008-2012)
As a percentage



Source: OBS LUMIERE

In terms of relative share, there was a shift of the status quo in favour of female directors from the period 2003 to 2007 to the period 2008 to 2012, both in terms of production volume and attendance levels; the share of films with female directors increased by 2.1% whereas the share of admissions increased by 1.2%.

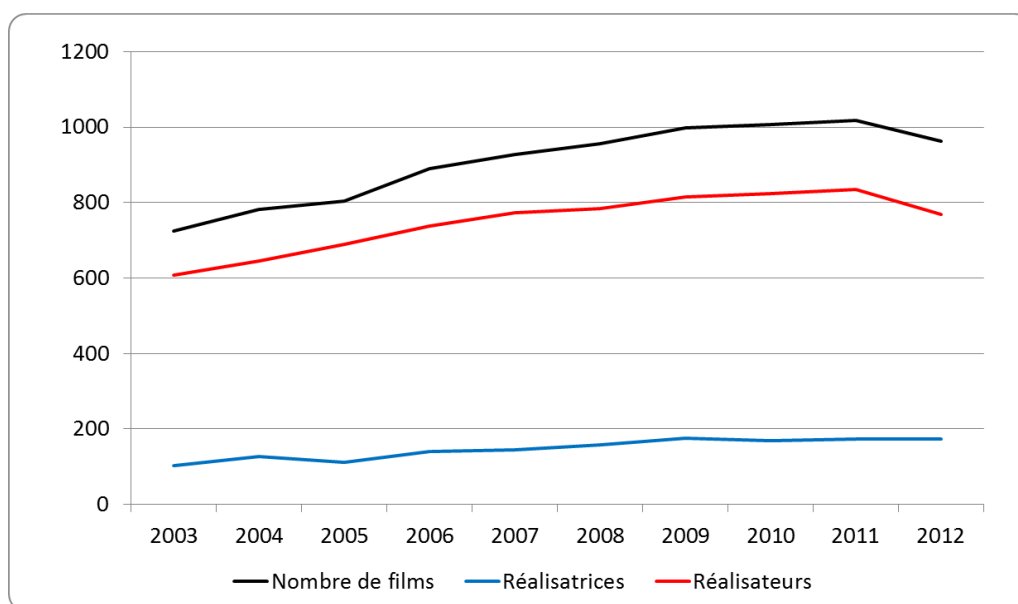
Overall, there was a widespread increase in the numbers of films produced over the period under analysis, particularly for those by female directors (in 17 of the 19 countries analysed), but this was not always accompanied by an increase in the numbers of admissions at the box office (this occurred in only 10 territories). The share of films by female directors increased in the period from 2008 to 2012 compared to the period 2003 to 2007 in 14 of the 19 countries analysed, and there was a shift in the opposite direction in the remaining 5 countries. Conversely, in 9 of the 19 countries under analysis there was an increase in the numbers of admissions to female-directed films and a decrease in the remaining 10 countries. In conclusion, more women were given a chance as directors, but this did not have a proportional impact on their share of the box office. Finally, the list of countries which saw a positive increase in terms of volume of production, numbers of admissions and performance of films by female directors to a sufficiently relevant extent to produce a shift in the status quo of these three indicators is quite limited and includes Denmark, the Netherlands, Poland and Turkey.

1.2 Synthèse

Cette analyse paneuropéenne des films réalisés par des femmes, une première en son genre, a été produite à l'aide de LUMIERE, la base de données de l'Observatoire européen de l'audiovisuel sur les entrées des films distribués en Europe. L'étude prend en considération 9 072 films européens produits et distribués en salle entre 2003 et 2012, représentant 3 192 190 000 entrées en Europe. L'analyse a été effectuée en s'intéressant à deux indicateurs principaux : le nombre de films et le nombre d'entrées en tenant compte d'une série de variables, à savoir : année de production, origine de la production, sexe du réalisateur / de la réalisatrice, type de production et pays de sortie. Le rapport est divisé en trois sections : dans la première, l'état des lieux est dressé et la méthodologie du rapport est expliquée ; dans la deuxième, le marché européen de la production est examiné comme un ensemble ; dans la troisième, chaque pays est étudié indépendamment et les réalités nationales sont mises en évidence.

La deuxième partie révèle une importante fracture entre les sexes, à la fois en ce qui concerne le volume de films produits et les entrées. A peine 16,3 % des films sortis entre 2003 et 2012 ont été réalisés par des femmes. Cette période n'a pas connu de fluctuations significatives, le pourcentage de films produits par des réalisatrices variant entre un maximum de 18,1 % en 2012 et un minimum de 13,7 % en 2005.

Figure 1 Nombre de films européens sortis en salles, par sexe du réalisateur et année de production
Par nombre de films



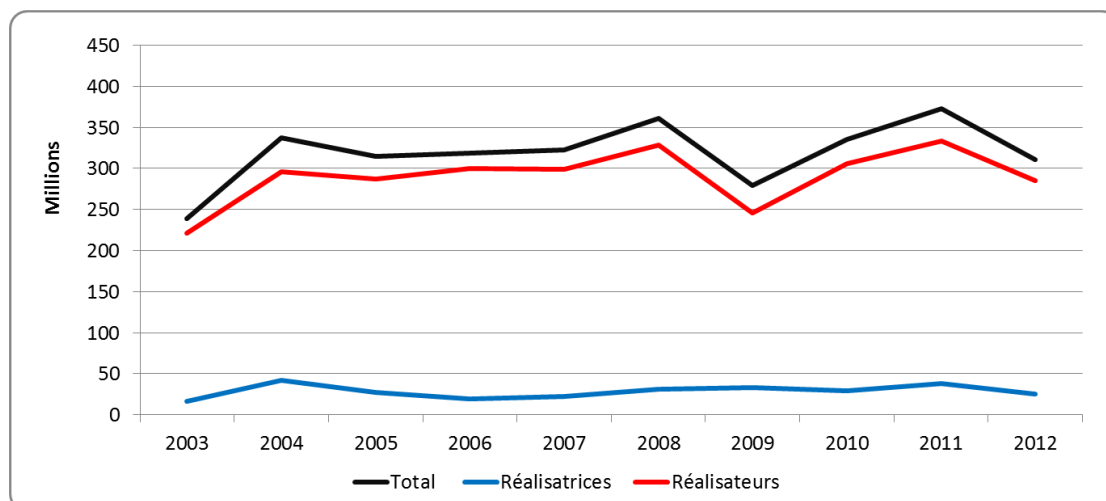
Source : OBS LUMIERE

La comparaison des cinq premières et des cinq dernières années de la série indique que le volume de films réalisés par des femmes a augmenté de 35,7 % de la période 2003-2007 à la période 2008-2012, alors que la hausse n'est que de 16,5 % pour les films réalisés par des hommes. Autrement dit, à croissance constante, 51 années seront nécessaires pour que le volume de production des réalisateurs des deux sexes soit égal.

En ce qui concerne la fréquentation, le volume relatif des entrées des films réalisés par des femmes est plus limité, ces films ne représentant que 8,9 % de la fréquentation totale sur la même période. Dans ce cas, toutefois, les fluctuations dans le temps sont légèrement plus marquées : les entrées des films réalisés par des femmes variant entre un maximum de 12,4 % en 2004 et un minimum de 5,9 % en 2006. Il convient de noter que le film européen réalisé par une femme qui a remporté le plus de succès au cours de la période analysée, *Bridget Jones: The Edge of Reason*, a été tourné

en 2004. Quoi qu'il en soit, si nous éliminons le pourcentage supérieur des films des réalisateurs des deux sexes de l'échantillon analysé, nous n'observons qu'une évolution marginale du statu quo pour les deux indicateurs concernés.

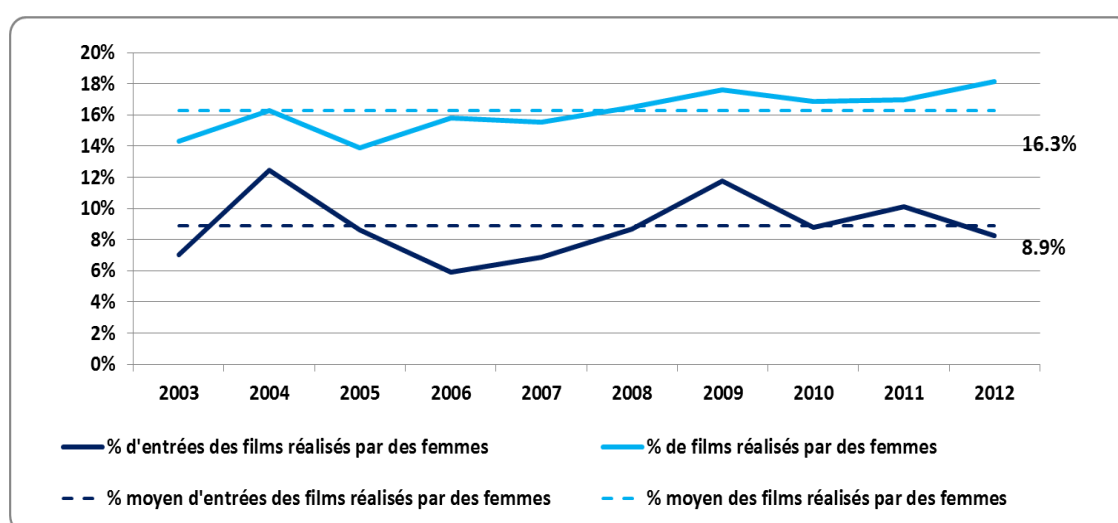
Figure 2 Entrées des films européens, par sexe du réalisateur (2003-2012)
En millions



Source : OBS LUMIERE

Quoi qu'il en soit, si le taux de croissance de 5 ans en 5 ans des entrées des films réalisés par des hommes (6,8 %) et par des femmes (23,7 %), de 2003 à 2007 et de 2008 à 2012, reste constant, il faudrait plus de 75 ans pour combler le fossé de la fréquentation en fonction du sexe du réalisateur. En outre, le poids relatif des films réalisés par des femmes, à la fois en volume de production et en nombre d'entrées, est et reste tout à fait marginal, comme le montre le graphique ci-dessous.

Figure 3 Comparaison de la part relative des films dans la production totale européenne et de leur part de marché d'entrées (2003-2012)
En pourcentage



Source : OBS LUMIERE

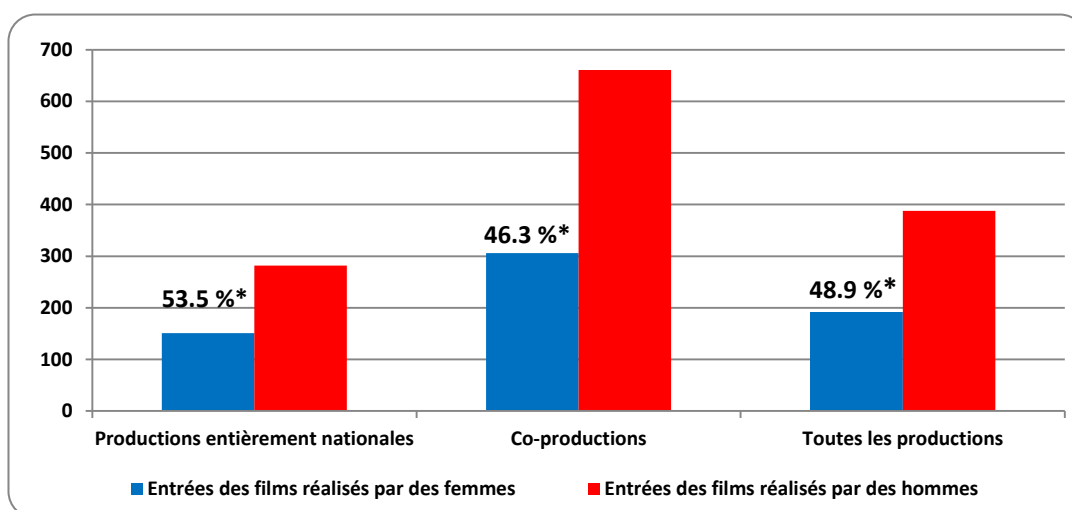
Sur la période 2003-2012, les résultats commerciaux des films européens dans les salles euro-

péennes s'établissent, en moyenne, à 351 873 entrées par film, mais à 388 097 entrées par film pour les films réalisés par des hommes et à 191 954 entrées par film pour les films réalisés par des femmes. En d'autres termes, un film réalisé par un homme a enregistré en moyenne un peu plus de deux fois le nombre d'entrées (2,02) d'un film réalisé par une femme. En outre, le nombre d'entrées de la plupart des films est inférieur à la moyenne, quelques bons résultats tirant vers le haut une fréquentation moyenne plus faible. De plus, les films réalisés par des femmes se retrouvent beaucoup plus dispersés dans ce classement que ceux des films réalisés par leurs homologues masculins.

Toutefois, ces chiffres sont loin des valeurs médianes qui s'établissent à 41 178 entrées pour les films réalisés par des hommes et à 20 851 entrées pour ceux réalisés par des femmes, le chiffre médian pour les 9 072 films analysés étant de 37 211 entrées par film. Une valeur moyenne beaucoup plus élevée que sa médiane respective confirme qu'une partie importante des entrées est due aux valeurs extrêmes de quelques films au sommet du classement ; ou, en sens inverse, que la fréquentation de la grande majorité des productions est nettement inférieure à la moyenne.

Le rapport analyse ensuite quelle incidence le sexe du réalisateur / de la réalisatrice peut avoir selon que le film est une production purement nationale ou une coproduction, ainsi qu'en fonction du type de sortie (nationale/étrangère). La part des coproductions selon le sexe du réalisateur est restée assez stable au cours de la période 2003-2012 : 26,3 % des films réalisés par des femmes ont bénéficié d'un certain niveau d'investissements financiers étrangers, contre 28 % des films réalisés par des hommes, soit une différence d'à peine 1,7 %. Toutefois, il convient de noter que l'écart en fonction du sexe du réalisateur s'élargit lorsque l'on s'intéresse à la part des entrées des coproductions. 41,7 % des entrées pour les films réalisés par des femmes (119 120 000 entrées) viennent des films en coproduction alors que 46,9 % des entrées pour les films réalisés par des hommes (1 384 500 000 entrées) proviennent des coproductions, soit un écart de 5,2 %. Comme souvent suggéré par certains secteurs de l'industrie, cette différence peut être due au profil plus modeste des films réalisés par des femmes, qui auraient accès à des budgets moins importants et bénéficieraient d'un investissement réduit dans la promotion et le marketing ; par conséquent, ces films généreraient des recettes inférieures. Néanmoins, le manque de données budgétaires complètes pour les films analysés ne permet pas d'étayer cet argument.

Figure 4 Fréquentation moyenne par film européen, par type de production et sexe du réalisateur (2003-2012)
En milliers d'entrées



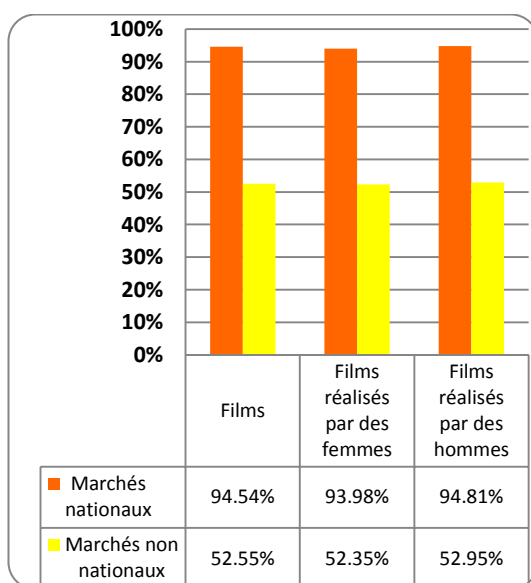
Source : OBS LUMIERE

* Fréquentation moyenne/film réalisé par une femme exprimée en pourcentage de la fréquentation moyenne/film réalisé par un homme de la catégorie correspondante

En ce qui concerne les sorties en salles, la plupart des films européens sont sortis au niveau national, à peine 52,8 % d'entre eux ayant bénéficié d'une sortie internationale en Europe entre 2003 et 2012, sans qu'une différence relative significative soit observée en fonction du sexe ; la part des films sortis dans au moins un pays autre que le marché national en Europe pendant la période étudiée est de 52,5 % pour les films réalisés par des femmes et de 53,2 % pour les films réalisés par des hommes. Là encore, la différence se trouve au niveau des entrées : 29,4 % des billets vendus pour des films réalisés par des femmes proviennent de marchés européens non-nationaux contre 36,7 % dans le cas des films réalisés par des hommes. Malgré une différence d'à peine 0,73 % entre la distribution en Europe de films réalisés par des femmes et de films réalisés par des hommes, la fracture entre les sexes passe à 7,3 % pour les entrées par sexe sur les marchés concernés.

Figure 5 Part des films européens par territoire de sortie, par sexe du réalisateur (2003-2012)

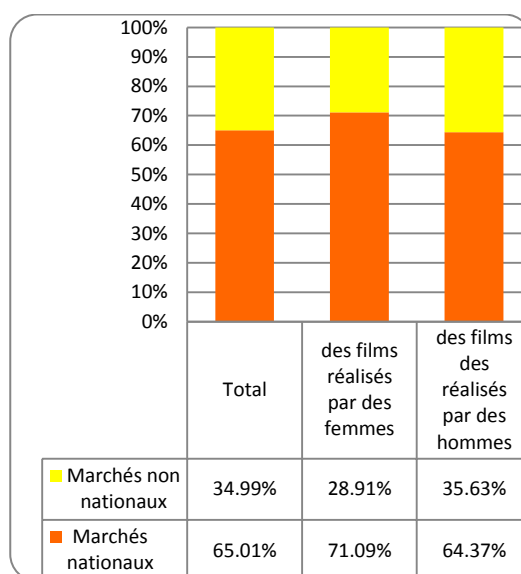
En pourcentage



Source : OBS LUMIERE

Figure 6 Part des entrées des films européens par territoire de sortie, par sexe du réalisateur (2003-2012)

En pourcentage



Source : OBS LUMIERE

En termes de poids relatif, la part des films réalisés par des femmes est identique sur les marchés nationaux et européens non-nationaux : 16,2 %. Toutefois, à peine 7,3 % des entrées sur les marchés européens non-nationaux sont associés aux films réalisés par des femmes contre 9,7 % pour les marchés nationaux.

Afin de comparer les productions ayant rencontré le plus de succès des réalisateurs des deux sexes, un pourcentage (1 % dans ce cas) plutôt qu'un nombre fixe de films est utilisé pour établir l'échantillon de l'analyse ; par conséquent les 75 (environ 1 % du total des 7 479 films de cette catégorie) films réalisés par des hommes et ayant le plus d'entrées ont été comparés aux 15 (environ 1 % des 1 479 films de cette catégorie) productions ayant rencontré le plus de succès de leurs homologues féminins. Le 1 % supérieur des films réalisés par des hommes représente 38,3 % des entrées des films de cette catégorie, contre à peine 23,7 % dans le cas des films réalisés par des femmes, ce qui montre une concentration beaucoup plus élevée d'entrées en haut du classement des films réalisés par des hommes.

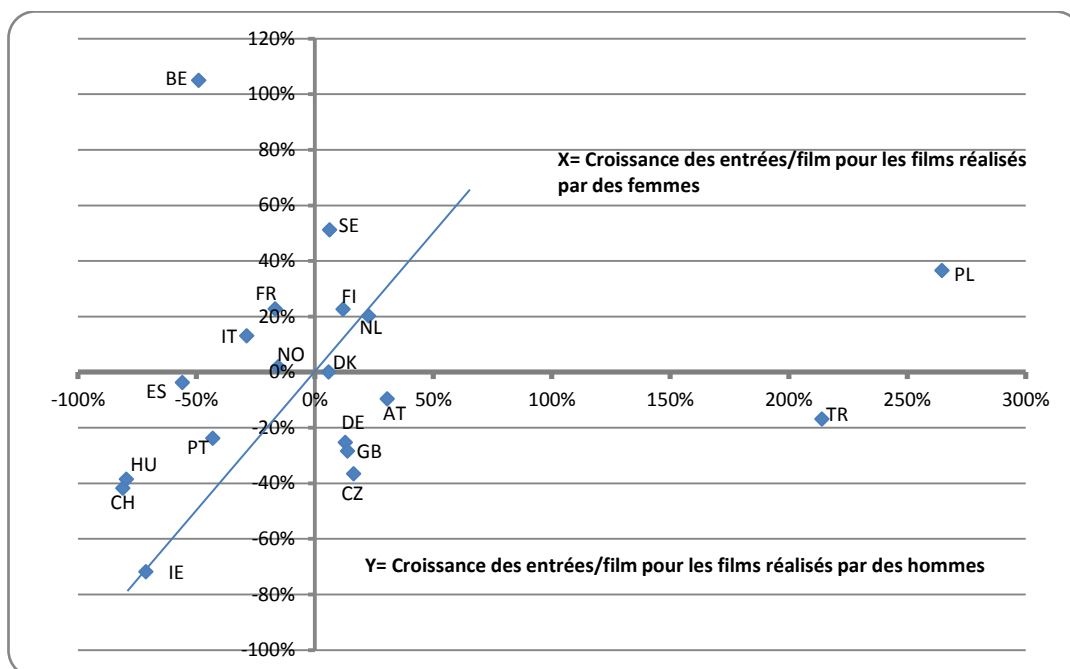
En outre, 48,2 % des entrées de ces films en haut du classement réalisés par des femmes proviennent de marchés Européens non-nationaux, alors que ce chiffre est de 57 % dans le cas des films en haut du classement réalisés par leurs homologues masculins. Il convient de noter que l'écart entre les sexes s'élargit au sommet pour cet indicateur, ce qui signifie que le volume relatif de la fréquentation pour les films réalisés par des femmes est encore plus faible en haut qu'en moyenne, l'écart

pour la fréquentation moyenne par film augmentant nettement en haut du classement, pour atteindre un rapport femme:homme de près de 1:3,55.

La troisième partie de notre analyse montre que les grands pays européens ne se trouvent pas en haut du classement en ce qui concerne la part des films produits et la part des entrées des films réalisés par des femmes ; Ce sont principalement les pays de production de taille moyenne qui ont les volumes de production et les niveaux de fréquentation les plus élevés pour les films réalisés par des femmes ; en fait, la part des films produits ou celle des entrées des films réalisés par des femmes dans la plupart des grands pays de production est inférieure à la moyenne européenne dans son ensemble.

Dans cette section, les mesures des divers indicateurs de croissance sont effectuées par période de 5 ans au cours de la période 2003-2012 ; c'est-à-dire, en comparant les résultats obtenus pour la période 2003-2007 à ceux de la période 2008-2012. Davantage de pays ont progressé au niveau du nombre de films qu'au niveau du nombre d'entrées entre ces périodes. En outre, la croissance du nombre d'entrées a été plus modérée que la croissance en du nombre total de films, quel que soit le sexe du réalisateur/de la réalisatrice. Le nombre de films européens produits a progressé de 19,5%, tandis que le nombre d'entrées n'a augmenté que de 8,3 % sur la même période. Les films européens réalisés par des femmes ont connu une augmentation bien supérieure à ces taux (+35,7 % pour les films et +23,6 % pour les entrées). La différence de croissance pour les deux indicateurs reflète une diminution de la fréquentation moyenne par film pour les deux réalisateurs des deux sexes. En fait, les résultats commerciaux des films réalisés par des femmes ont diminué (un peu) plus (8,9 %) que ceux des films réalisés par des hommes (8,5 %), les deux étant très proches du point d'équilibre, ce qui représente une évolution marginale du statu quo en termes de résultats commerciaux en faveur des réalisateurs de sexe masculin.

Figure 7 Evolution de la fréquentation moyenne par film, selon le sexe du réalisateur (2003-2007 à 2008-2012)
En pourcentage



Source : OBS LUMIERE

En termes de part relative, le statu quo a évolué en faveur des réalisatrices de la période 2003-2007 à la période 2008-2012, à la fois pour le volume de production et la fréquentation ; la part des films

réalisés par des femmes a augmenté de 2,1 % alors que la part de la fréquentation a augmenté de 1,2 %.

Dans l'ensemble, il est noté une augmentation généralisée du nombre de films produits au cours de la période étudiée, en particulier pour ceux réalisés par des femmes (dans 17 des 19 pays analysés), mais cette progression n'a pas toujours été accompagnée d'une augmentation du nombre d'entrées en salles (qui ne s'est produite que dans 10 territoires). Le volume relatif des films réalisés par des femmes a augmenté sur la période 2008-2012 par rapport à la période 2003-2007 dans 14 des 19 pays analysés, les 5 autres pays ayant connu une tendance inverse. A l'inverse, le nombre d'entrées des films réalisés par des femmes a augmenté dans 9 des 19 pays analysés et diminué dans les 10 autres pays.

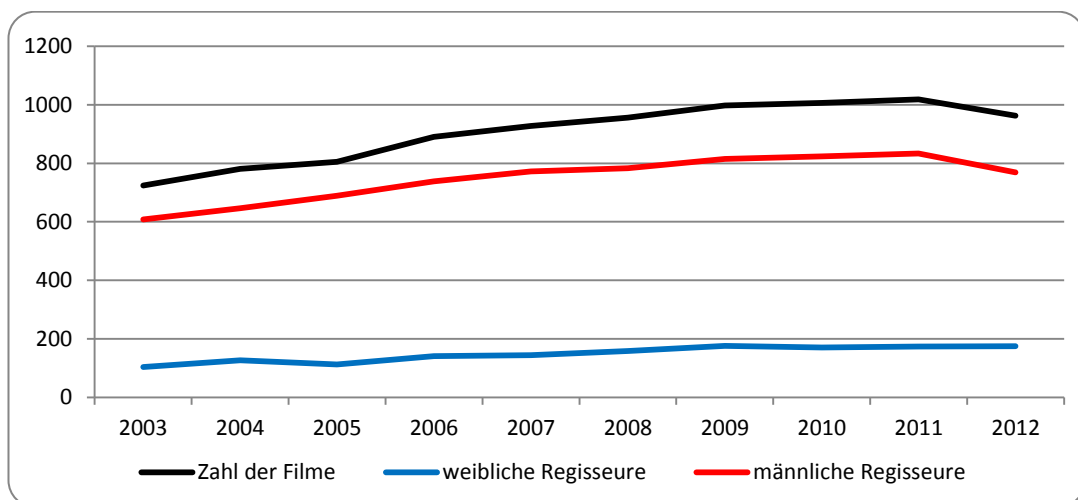
En conclusion, plus de femmes ont eu leur chance comme réalisatrices, mais cela n'a pas eu d'incidence proportionnelle sur leur part des entrées. Enfin, la liste des pays ayant connu une augmentation positive en termes de volume de production, de nombre d'entrées et nombre moyen d'entrées par film réalisé par des femmes dans une mesure suffisamment pertinente pour produire une évolution significative de ces trois indicateurs est assez limitée et comprend le Danemark, les Pays-Bas, la Pologne et la Turquie.

1.3 Zusammenfassung

Dies ist die erste gesamteuropäische Analyse von Filmen weiblicher Regisseure, die jemals für europäische Filme durchgeführt wurde. Sie stützt sich auf die Daten von LUMIERE, der Filmdatenbank der Europäischen Audiovisuellen Informationsstelle, die Kinobesucherzahlen für europäische Märkte enthält. Für die Studie wurden insgesamt 9 072 europäische Filme untersucht, die zwischen 2003 und 2012 produziert und in die Kinos kamen und von 3 192,19 Millionen Besuchern in Europa gesehen wurden. Bei der Analyse wurden zwei Hauptindikatoren zugrunde gelegt: die Zahl der Filme und die Zahl der Kinobesucher. Dabei wurde eine Reihe von Variablen berücksichtigt, in erster Linie: das Produktionsjahr, das Produktionsland, das Geschlecht des Regisseurs, die Art der Produktion und das Land, in dem der Film in die Kinos kam. Der Bericht gliedert sich in drei Kapitel: ein erstes Kapitel über den aktuellen Stand und die Methodik des Berichts; ein zweites Kapitel über den europäischen Produktionsmarkt insgesamt und ein drittes Kapitel, in dem jedes Land einzeln analysiert wird und die einzelnen Länder miteinander verglichen werden.

Im zweiten Kapitel wird deutlich, dass bei Filmen signifikante geschlechtsspezifische Unterschiede bestehen, und zwar nicht nur, was den Umfang der Filmproduktion betrifft, sondern vor allem auch im Hinblick auf die Kinobesucherzahlen. Nur 16,3% der untersuchten Filme wurden in dem Zeitraum 2003 bis 2012 von weiblichen Regisseuren inszeniert; in diesem Zeitraum konnten keine signifikanten Höhen und Tiefen festgestellt werden. Den höchsten Anteil an weiblichen Regisseuren gab es mit 18,1% im Jahr 2012, den niedrigsten mit 13,7% im Jahr 2005.

Abbildung 1 Anzahl europäischer Filme, die von weiblichen Regisseuren inszeniert wurden, und Produktionsjahr
Nach Anzahl der Filme



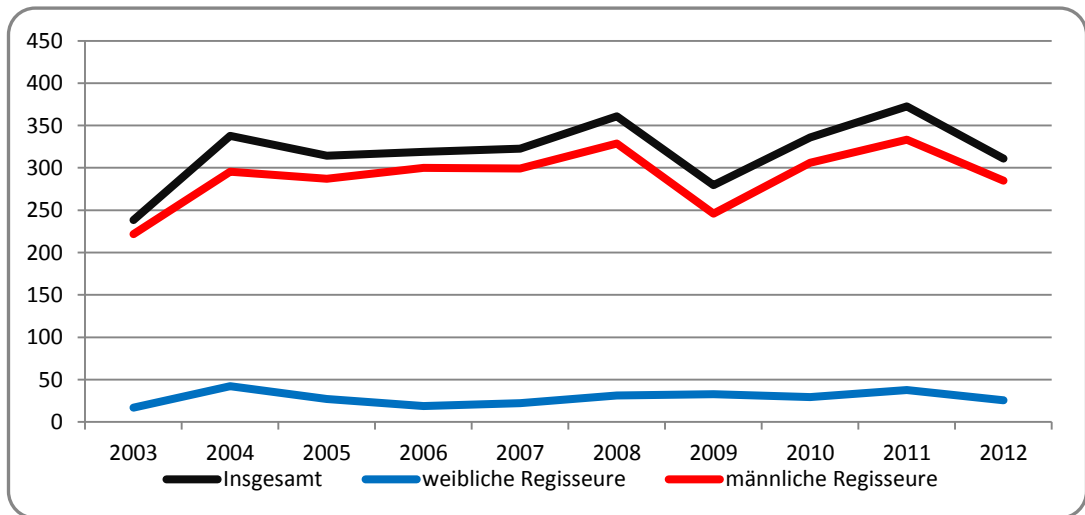
Quelle: OBS LUMIERE

Wenn wir das erste Jahr und die letzten fünf Jahre der Zeitreihe vergleichen, können wir sehen, dass die Anzahl der Filme, die von Frauen inszeniert wurden, zwischen 2003-2007 und 2008-2012 um 35,7% zugenommen hat, bei den männlichen Regisseuren betrug die Zunahme dagegen nur 16,5%. Bei dieser Wachstumsrate würde es noch 51 Jahre dauern, bevor weibliche Regisseure das Produktionsniveau ihrer männlichen Kollegen erreicht hätten.

Untersucht man die Zahl der Kinobesucher, so wird die Kluft noch deutlicher. Die Filme, die von weiblichen Regisseuren inszeniert wurden, hatten sehr viel weniger Besucher: Auf die Filme weiblicher Regisseure entfallen lediglich 8,9% aller Kinobesucher in demselben Zeitraum. In diesem Fall sind die Höhen und Tiefen allerdings wesentlich stärker ausgeprägt: Die Zahl der Kinobesucher reicht von einem Höhepunkt von 12,4% im Jahr 2004 bis zu 5,9% im Jahr 2006. Der Höhepunkt bei den Besucherzahlen dürfte darauf zurückzuführen sein, dass der erfolgreichste europäische Film, der jemals von einem weiblichen Regisseur in dem untersuchten Zeitraum inszeniert wurde, *Bridget Jones: The Edge of Reason* (deutscher Titel: *Bridget Jones, am Rande des Wahnsinns*), 2004 in die

Kinos kam. Lässt man die Top 1% der Filme männlicher und weiblicher Regisseure beiseite, ergibt sich jedoch ein ganz anderes Bild. In diesem Fall sind die Veränderungen beim Status quo nur marginal.

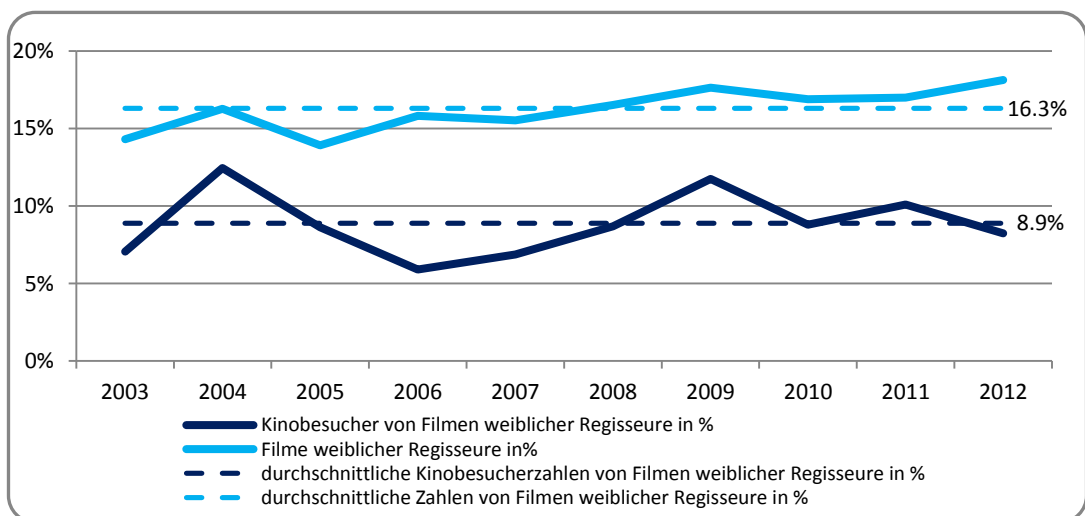
Abbildung 2 Kinobesucher europäischer Filme nach Geschlecht des Regisseurs (2003-2012)
In Millionen



Quelle: OBS LUMIERE

Bei einer konstant bleibenden 5-Jahres-Wachstumsrate von 2003 bis 2007 und von 2008 bis 2012 für Kinobesucher von Filmen, die von männlichen (6,8%) und weiblichen Regisseuren (23,7%) inszeniert wurden, würde es mehr als 75 Jahre dauern, bis sich die Lücke bei den Kinobesucherzahlen nach Geschlecht des Regisseurs schließen würde. Außerdem ist das relative Gewicht von Filmen weiblicher Regisseure sowohl, was das Produktionsvolumen als auch was die Zahl der Kinobesucher betrifft, nach wie vor marginal, wie aus der folgenden Graphik hervorgeht.

Abbildung 3 Vergleich des relativen Volumens von Filmen und Besucherzahlen nach Geschlecht über die Zeit (2003 bis 2012)
In %



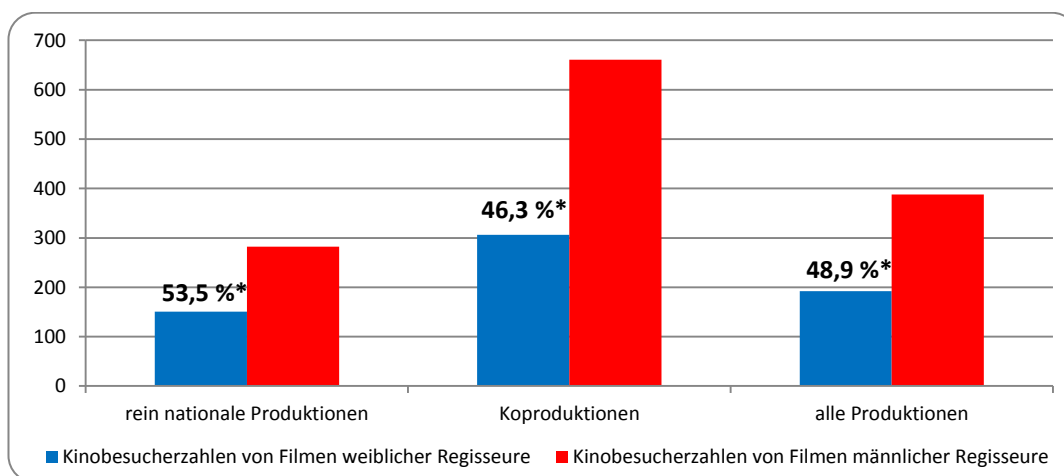
Quelle: OBS LUMIERE

Im Schnitt hatten europäische Filme, die in europäischen Kinos gezeigt wurden, in dem Zeitraum 2003 bis 2012 351 873 Besucher pro Film. Die Filme männlicher Regisseure brachten es im Schnitt auf 388 097 Besucher pro Film, bei den von Frauen inszenierten Filmen waren es 191 954 Besucher. Mit anderen Worten: Auf Filme, die von männlichen Regisseuren inszeniert wurden, entfielen etwas mehr als doppelt so viele Besucher (2,02) wie auf Filme weiblicher Regisseure. Außerdem hatten die meisten Filme unterdurchschnittlich viele Besucher, mit einigen wenigen Ausreißern an der Spitze der Liste, die für das Plus verantwortlich waren. Ein weiterer Unterschied: Filme weiblicher Regisseure waren weitaus stärker über das Ranking der Besucherzahlen verstreut als Filme ihrer männlichen Konkurrenten.

Diese Zahlen unterscheiden sich jedoch erheblich von den Mittelwerten für Filme mit Beteiligung von Regisseuren beider Geschlechts. Bei Filmen, die von Männern inszeniert wurden, lag der Mittelwert bei 41 178 Besuchern, bei Filmen, die von Frauen inszeniert wurden, lag er bei 20 851; der Median für die analysierten 9 072 Filme liegt bei 37 211 Kinobesuchern pro Film. Ein Durchschnittswert, der sehr viel höher ist als der Median, macht deutlich, dass ein großer Teil der Besucher auf einige wenige Filme an der Spitze der Liste entfällt. Oder aber anders herum gesagt, bei dem größten Teil der Filme lag die Zahl der Kinobesucher weit unter dem Durchschnitt.

Im Anschluss an diese Analyse untersucht der Bericht, den quantitativen Zusammenhang zwischen dem Geschlecht des Regisseurs und der Produktionsart des Films, das heißt, ob es sich bei dem betreffenden Film um eine nationale Produktion oder um eine internationale Koproduktion handelt. Dabei wird auch berücksichtigt, in welchem Land der Film in die Kinos kam (im Inland oder im Ausland). Schlüsselt man den Anteil internationaler Koproduktionen nach dem Geschlecht des Regisseurs auf, so ergeben sich für den Zeitraum zwischen 2003 und 2012 kaum Unterschiede: 26,3% der Filme, bei denen Frauen Regie führten, wurden mit ausländischen Investitionen gedreht, bei den von Männern inszenierten Filmen waren es 28%. Das ist ein minimaler Unterschied von 1,7%. Das Verhältnis ändert sich jedoch, wenn man den Anteil der Kinobesucher von internationalen Koproduktionen berücksichtigt. In diesem Fall stehen 41,7% Filme weiblicher Regisseure (119,12 Millionen Besucher) 46,9% Filmen männlicher Regisseure gegenüber (1 384,50 Millionen Besucher) – eine Differenz von 5,2%. Wie schon oft von einigen Sektoren der Filmindustrie gemutmaßt, dürfte dieser Unterschied darauf zurückzuführen sein, dass Filme, bei denen Frauen Regie führen, häufig mit einem niedrigen Budget ausgestattet sind, da Frauen in der Regel nur Zugang zu geringeren Budgets haben und bei Filmen weiblicher Regisseure die Investitionen in Werbung und Marketing häufig niedriger sind. Dies hat zur Folge, dass Filme weiblicher Regisseure an den Kinokassen weniger einspielen. Allerdings fehlen präzise Zahlen über Filmbudgets, die dieses Argument erhärten könnten.

Abbildung 4 Durchschnittliche Besucherzahlen pro europäischer Film nach Art der Produktion und nach Geschlecht des Regisseurs (2003 bis 2012)
In Tausend

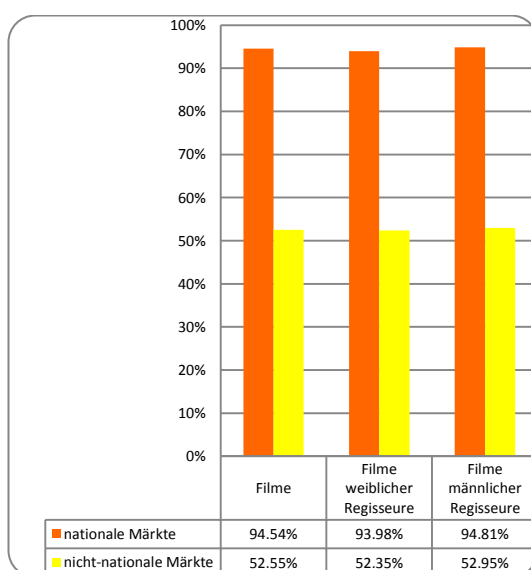


Quelle: OBS LUMIERE

* Durchschnittliche Besucherzahlen pro Film weiblicher Regisseure in % der durchschnittlichen Besucherzahlen/Film männlicher Regisseure der entsprechenden Kategorie

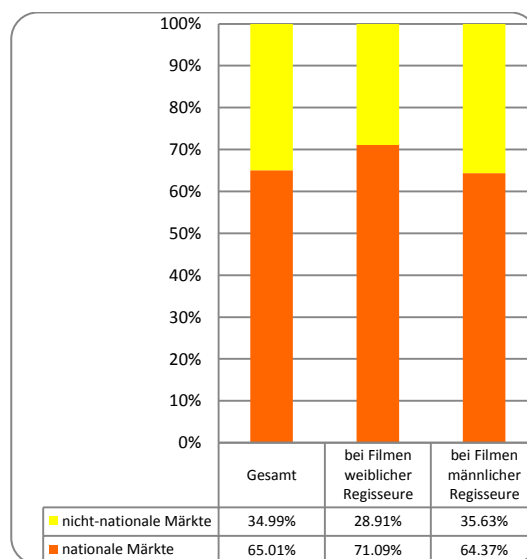
Die meisten europäischen Filme wurden in ihren Heimatmärkten im Kino ausgewertet. Nur 52,8% dieser Filme kamen zwischen 2003 und 2012 in anderen europäischen Ländern ins Kino. Dabei lässt sich kein nennenswerter Unterschied zwischen Filmen männlicher und Filmen weiblicher Regisseure feststellen. Bei den von Frauen inszenierten Filmen lag die Zahl der Filme, die in mindestens einem anderen Land ins Kino kamen, bei 52,5%, bei den Filmen männlicher Regisseure lag die entsprechende Zahl bei 53,2%. Betrachtet man die Zahl der Kinobesucher, ergibt sich jedoch ein ganz anderes Bild. Auf Filme weiblicher Regisseure, die aus nicht-nationalen europäischen Märkten kamen, entfielen 29,4% der verkauften Eintrittskarten, auf Filme männlicher Regisseure 36,7%. Obwohl der Unterschied zwischen dem internationalen Vertrieb von Filmen weiblicher und männlicher Regisseure nur bei 0,73% liegt, erhöht sich diese Differenz auf 7,3%, wenn man den Anteil der Kinobesucher von Filmen nach Geschlecht des Regisseurs in den betreffenden Märkten untersucht.

Abbildung 5 Anteil europäischer Filme nach dem Land des Filmstarts je nach Geschlecht (2003 bis 2012)
In %



Quelle: OBS LUMIERE

Abbildung 6 Anteil der Kinobesucher europäischer Filme nach dem Land des Filmstarts je nach Geschlecht (2003 bis 2012)
In %



Quelle: OBS LUMIERE

Was das relative Gewicht anbelangt, so war der Anteil von Filmen weiblicher Regisseure auf nationalen und ausländischen Märkten identisch: 16,2%. Allerdings entfielen nur 7,3% der Kinobesucher auf ausländischen Märkten auf Filme, die von weiblichen Regisseuren inszeniert wurden – in heimischen Märkten waren es dagegen 9,7%.

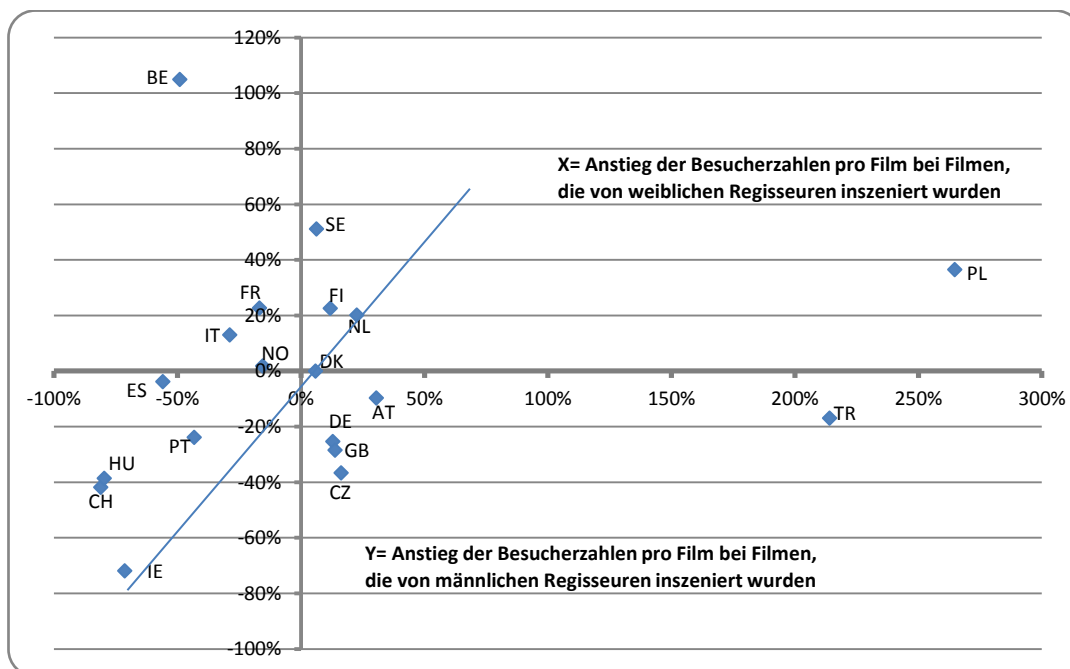
Um vergleichen zu können, welche Filme beider Geschlechts an den Kinokassen am erfolgreichsten waren, eignet sich ein Prozentsatz (1% in diesem Fall) besser als eine feste Zahl von Filmen; aus diesem Grund wurden die 75 (rund 1% aller 7 479 Filme in dieser Kategorie) erfolgreichsten Filme männlicher Regisseure mit den 15 (rund 1% der 1 479 Filme in dieser Kategorie) erfolgreichsten Filmen weiblicher Regisseure verglichen. Auf die Top-1% der Filme männlicher Regisseure entfielen 38,3% der Kinobesucher in dieser Kategorie, bei den Filmen, die von weiblichen Regisseuren inszeniert wurden, waren es lediglich 23,7%. Das heißt, die Filme männlicher Regisseure an der Spitze der Liste hatten sehr viel mehr Besucher.

Außerdem kamen 48,2% der Besucher dieser Top-Filme weiblicher Regisseure aus ausländischen Märkten, bei den Filmen männlicher Filmemacher waren es 57%. Bei diesem Indikator wächst der Abstand an der Spitze, das heißt, die Top-Filme weiblicher Regisseure hatten noch weniger Besucher als der Durchschnitt. Der Abstand durchschnittlicher Kinobesucher pro Film steigt an der Spitze drastisch an. Hier beträgt das Verhältnis von 1:3,55 (weiblich:männlich).

Der dritte Teil unserer Analyse zeigt, dass die Länder mit der größten Filmindustrie (in absoluten Zahlen nach Produktionsumfang) und die Märkte mit mehr Besuchern von Filmen weiblicher Regisseure nicht unbedingt die Länder sind, in denen Filme weiblicher Regisseure am erfolgreichsten waren. Bei den Ländern mit der größten Zahl von Filmen, die von Frauen inszeniert wurden, und in denen die höchsten Besucherzahlen für Filme weiblicher Regisseure erzielt wurden, handelt es sich durchweg um Länder mit einer mittelgroßen Filmproduktion. In der Tat lag das relative Volumen von Filmen weiblicher Regisseure sowohl was die Zahl der produzierten Filme als auch was die Zahl der Kinobesucher anbelangt, in den meisten der Länder mit der größten Kinoproduktion unter dem gesamteuropäischen Durchschnitt.

Die Messung von Wachstumsraten in diesem Kapitel erfolgte auf dem Vergleich zweier Fünfjahresperioden zwischen 2003 bis 2012; das heißt, die Ergebnisse des Zeitraums 2003 bis 2007 wurden mit denen des Zeitraums 2008 bis 2012 verglichen. Dabei wuchs die Zahl der Länder, in denen mehr Filme gedreht wurden, stärker als die Zahl der Kinobesucher in diesem Zeitraum. Das Wachstum bei den Besucherzahlen war schwächer als das Wachstum der Zahl der Filme beider Geschlechter. Die Zahl der europäischen Filme hat in dem Zeitraum um 19,47% zugenommen, die Zahl der Kinobesucher in demselben Zeitraum dagegen nur um 8,3%. Bei europäischen Filmen weiblicher Regisseure lagen die Wachstumsraten jedoch weit über diesem Prozentsatz (35,7% mehr Filme und 23,6% mehr Besucher). Die Differenz beim Wachstum beider Indikatoren spiegelt einen Rückgang der durchschnittlichen Besucherzahlen für beide Geschlechter wider. Die Zahl der erfolgreichen Filme, die von Frauen inszeniert wurden, ging in diesem Zeitraum etwas stärker zurück (und zwar um 8,9%) als die Zahl erfolgreicher Filme männlicher Regisseure (um 8,5%). Also ein fast ausgeglichenes Ergebnis. Das ist eine marginale Veränderung des Status quo, was den Erfolg der Filme männlicher Regisseure betrifft.

Abbildung 8 Entwicklung der Besucherzahlen nach Geschlecht des Regisseurs
(von 2003-2007 bis 2008-2012)
In %



Quelle: OBS LUMIERE

Was den relativen Anteil anbetrifft, so hat sich der Status quo von dem Zeitraum 2003-2007 bis zu dem Zeitraum 2008-2012 zugunsten weiblicher Regisseure verändert, und zwar sowohl in Bezug auf das Produktionsvolumen als auch in Bezug auf die Besucherzahlen. Der Anteil von Filmen weiblicher Regisseure stieg um 2,1%, der Anteil der Besucher um 1,2%.

Insgesamt ist die Zahl der Filme, die in dem untersuchten Zeitraum produziert wurden, erheblich gestiegen, vor allem die Zahl der Filme, bei denen Frauen Regie geführt haben (in 17 der 19 untersuchten Länder). Dies hat sich jedoch nicht unbedingt in der Zahl der Kinobesucher niedergeschlagen (das war nur in 10 Ländern der Fall). In 14 der 19 untersuchten Länder stieg der relative Umfang von Filmen, die von weiblichen Regisseuren inszeniert wurden, in dem Zeitraum 2008-2012 gegenüber dem Zeitraum 2003-2007, in fünf Ländern ging sie dagegen zurück. Bei den Besucherzahlen gab es dagegen in 9 der 19 untersuchten Länder eine Zunahme, in zehn ging ihre Zahl zurück. Abschließend lässt sich feststellen, dass zwar mehr Frauen die Chance erhalten haben, Regie zu führen, dass sich dies jedoch nicht proportional auf den Anteil der Einspielergebnisse ausgewirkt hat. Und schließlich ist die Liste der Länder mit einer positiven Entwicklung bei den Filmen weiblicher Regisseure (sowohl was das Produktionsvolumen als auch was die Zahl der Kinobesucher und die Einspielergebnisse anbelangt) überaus begrenzt: Sie beschränkt sich auf Dänemark, die Niederlande, Polen und die Türkei.

I State of play and analytical approach

2 Introduction and objectives

In June 2012, the European Audiovisual Observatory's Advisory Committee suggested that the Observatory collect data on employment within the audiovisual industry, with particular interest in figures on the place of women in the audiovisual industry. In response to this, the European Audiovisual Observatory (OBS) carried out the first pan-European analysis on the share of films by female directors in European productions, an issue that has been gathering more and more momentum ever since within the cinema industry in Europe and internationally. Using our LUMIERE database on film admissions,¹ it has been possible to gather information on the gender of film directors in European films between 2003 and 2012. Our study focuses on 9 072 European films accounting for 3 192.19 million admissions in Europe spanning a ten-year period between 2003 and 2012. The results reveal a significant divide between genders both in terms of films directed (only 16.3% of the films were shot by women) and attendance levels, with films by female directors accounting for only 8.9% of total admissions.

According to the UN's Department of Economic and Social Affairs, the population of the world was 6 916 183² million inhabitants in 2010, with a sex ratio of 1:0.98³ men:women. Eurostat revealed a level of upper secondary education attainment for women between 25 and 65 in the EU (28) of 74.8%⁴ as at 2012, just slightly below the average 75.2% for the total population. This same source states an employment rate of 68.5%⁵ of the working-age population (15 to 64) in the European Union in 2012; 74.6%⁶ of men and 62.4%⁷ of women. Even if the difference between the genders in terms of population is negligible and their higher education levels quite similar, there is, however, a remarkable divide when it comes to employment - a 12.2% gap. None of these general indicators seem to justify the massive gender divide when it comes to film direction.

Academia has a long tradition of analysing the role of woman in cinema; however, gender studies have focused primarily on gender prevalence and on-screen portrayal, explaining the social role of women in film, often reporting on the hypersexualization and stereotyping of females. However, a recent study by the University of Southern California⁸ goes beyond this and analysed the lesser-known territory of women directors. This analysis, which comprises the annual top 100 grossing films in America between 2007 and 2012, concludes that females represented less than 5% of all directors across the years analysed except in 2008, when their share increased to 8%. Although the scope and methodology used in their report does not allow a direct comparison with our figures, it is clear that there is also a significant gender gap across the pond.

Even if it is widely claimed that the cinema industry has been and continues to be a male-dominated environment, the gender divide has never been measured, and therefore either substantiated or negated, at European level. To date, only a few countries have monitored gender in key creative and managerial positions within the industry (including France, Norway, Sweden and the UK), or have implemented measures to help bridge the gap. It is beyond the scope of this report to identify, let

¹ <http://lumiere.obs.coe.int>

² <http://esa.un.org/unpd/wpp/Excel-Data/population.htm>

³ Ibid.

⁴ <http://epp.eurostat.ec.europa.eu/tgm/refreshTableAction.do?tab=table&plugin=1&pcode=tps00065&language=en>

⁵ <http://ec.europa.eu/social/BlobServlet?docId=9924&langId=en>

⁶ Ibid.

⁷ Ibid.

⁸ Dr. Smith S. L., Choueiti M., Scofield E., Dr Pieper K., (2013), *Screen portrayals and behind the scenes employment patterns in motion pictures released between 2007-2012*, University of Southern California, Annenberg.

alone tackle, each of the causes surrounding gender inequality in the cinema industry. Our analysis focuses on describing the current situation and the evolution over time in Europe, both on a country-by-country basis and as a whole. The figures and trends showing the evolution of female directors over ten years allows us to identify which countries have evolved towards a more equal approach to film direction. The aim of this report is to substitute the general feeling within the industry that women have less opportunity to access high-ranking positions – in particular as film directors – with solid statistics to establish whether, and to what extent, this widespread feeling is borne out by reality.

Moreover, even if the limited scope of our sample – and therefore of our analysis – prevents us from answering all of the pertinent questions surrounding the gender divide between filmmakers, this report aims to highlight a number of relevant aspects to be considered in this regard.

3 Scope and methodology

This analysis has been carried out using LUMIERE, the European Audiovisual Observatory's database on film admissions throughout Europe. Although LUMIERE aims to cover all 40 member states of the European Audiovisual Observatory,⁹ in practice coverage rates vary across individual territories. The overall coverage of the database for the period of reference is estimated at around 86% of the total European market, with LUMIERE containing regular data on admissions in 29¹⁰ European territories¹¹ (30 European production countries). However, some pruning of the raw figures was necessary before arriving at a suitable sample for the study.

Unlike LUMIERE, which indexes admissions by country of release, our analysis follows a geographical approach based on production; therefore, non-European films were removed from the analysis. As will be explained in chapter 6, only a portion of European local productions have a foreign release in Europe; by and large, most admissions to these films come from the local market. Therefore, it would seem appropriate that only figures for films produced in the 30 European production countries whose yearly admissions were regularly gathered during the period of analysis should form part of the study. However, with the exception of Russian productions, these films represent a marginal percentage of the overall European figures and do not affect the final results. Conversely, the Russian Federation aside, the aggregate admissions of European films produced in countries for which LUMIERE does not have regular data represent a marginal share of the European market in any given year. Hence, only Russian productions as well as admissions to European films in the Russian Federation were not included in the study sample.

The lower level of coverage in the early years of the database meant that it was not possible to start a comprehensive analysis from 1996. Therefore, the study covers a ten-year time span from 2003 to 2012, a period within which the figures for all relevant territories have an acceptable level of coverage in LUMIERE. Following this same logic of a lowest common denominator, a minimum number of admissions has been established for any film to be taken into consideration in the analysis. Since some countries provide a comprehensive list of titles released, whereas others only report releases reaching a certain level of attendance, the study sample excludes those films with under a thousand admissions in Europe during the period analysed for the sake of homogeneity. This may marginally distort the results of some countries with large production levels of films with very low attendance levels (under a thousand admissions), as well as of those countries with less exhaustive data on the titles at the bottom of the list by admissions, but it provides a much more accurate picture of the European situation.

To sum up, our analysis is limited to films and admissions to films produced in Europe (not including the Russian Federation) between 2003 and 2012, released in Europe (excluding the admissions generated in the Russian Federation) between 2003 and 2013 and reaching more than one thousand box office admissions. Despite being marginal within the aggregate European figures by number of

⁹ Albania, Armenia, Austria, Bosnia and Herzegovina, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Morocco, Montenegro, the Netherlands, Norway, Poland, Portugal, Romania, the Russian Federation, the Slovak Republic, Slovenia, Spain, Sweden, Switzerland, the "former Yugoslav Republic of Macedonia", Turkey and the United Kingdom.

¹⁰ Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland-United Kingdom, Iceland, Italy, Lithuania, Latvia, Luxembourg, the Netherlands, Norway, Poland, Portugal, Romania, the Slovak Republic, Slovenia, Spain, Sweden, Switzerland and Turkey.

¹¹ Attendance figures for the UK and Ireland are provided without a breakdown by country to the Observatory, therefore the two countries are treated as one territory for release. Nonetheless, British and Irish productions are counted separately when assessing the production volume of each country. This leaves us with a total of 29 territories for release and 30 territories for production for the purposes of calculating the basis of our analysis.

productions and admissions, productions from the 10¹² countries for which exhibition figures are not available in a comprehensive way could not form part of our study sample of country-by-country comparisons.

The analysis has been carried out looking at two main indicators: the number of films produced and the number of admissions considering a series of variables; namely year of production, origin of the production, gender of the director, type of production and country of release. In other words, the study examines the evolution over time of the number of films by male and female directors by country of origin and their performance in terms of admissions by kind of production and territory of release. Additionally, the report also offers an assessment of the situation at the top of the attendance charts by gender, a comparison of the indicators by country of origin and an analysis of the growth of the main indicators at global and national levels.

3.1 Year of production

The year of production has been chosen as a variable instead of the year of first release to focus the analysis on production rather than on exhibition, although the results for either indicator would have probably not been too dissimilar. All films produced before 2003 but released or on release during the designated period do not form part of the study sample, so as to focus the analysis on those works produced during the period 2003 to 2012.

3.2 Origin of the film

The origin of the film has been chosen instead of the nationality of the director, for a series of reasons. In the first place, the analysis wants to generate a picture of the gender balance in each country's cinema industry; therefore, it is the origin of the film itself which matters. Moreover, the actions and measures taken by each country to promote gender equality will impact on those directors of national productions, regardless of the actual nationality of the director themselves. Even if we had preferred to use the nationality of the director as a variable, it would have been impossible to identify it in most cases since, apart from a few well-known figures, there are no reliable sources for obtaining this information.

In order to determine the origin of a film the same principles used by LUMIERE apply here; although a film may have several co-producers from different countries, only national productions and majority co-productions will be taken into account for each given country so as to avoid double-counting and offer a more accurate picture of the actual situation. Furthermore, in cases of uncertainty or contradiction between several national sources, OBS will assess the origin of the film on a case-by-case basis based on objective elements, mainly the nationality and equity share of its production companies and investors and the cultural elements involved – nationality of the director, language of production, background of the story, et cetera. However, there is no one-size-fits-all methodology; therefore, the results of this study may provide a less accurate reflection of the reality of those countries where the level of minority co-productions is especially high.

3.3 Gender of the director

All the directors in our database have been categorised as *male directors*, *female directors* or *directors of unknown gender* (when the director is unknown or their gender could not be identified); this final category represents a marginal 1.3% of the films analysed and 0.2% of admissions between 2003 and 2012. Each feature-length film has been rated from 0 to 1 in each of the three categories

¹² Albania, Armenia, Bosnia and Herzegovina, Cyprus, Liechtenstein, the "former Yugoslav Republic of Macedonia", Malta, Morocco, Montenegro and the Russian Federation.

according to the gender of its director(s), so that the aggregate of all three always equals 1. The two main indicators used in the analysis – number of films and number of admissions – are calculated accordingly on a pro-rata basis.

When a feature-length film has been directed by one or several male directors one point was added to the *male directors* category, 0 to the *female directors* category and 0 to the *directors of unknown gender* category; equally, each film shot by one or more women received one entire point for the *female directors* category, 0 for the *male directors* category and 0 for the *directors of unknown gender* category. The same principle was applied for films where the director's gender was not known.

However, in a number of cases, there was shared authorship amongst filmmakers of different genders. When this happens, each co-director was assigned a proportional share of the full point; that is, in a film directed by two women and a man, each one would obtain one-third of a point and therefore, the aggregate of films directed by female directors would increase by two-thirds of a point, with the remaining one-third going towards the aggregate of films directed by male directors.

For the purposes of this report, we will use the term *film with female directors* when there is at least one woman involved in the directing. The term *film by female directors* will be used for the pro-rata share of a film based on the level of involvement of a female director. The corresponding nomenclature likewise applies for male directors and directors whose gender is not known.

Table 1 Examples of films by gender of the director

Films	Directors	Films with female directors	Films with male directors	Films by female directors	Films by male directors
1 film	 +  + 	1	1	0.66	0.33
1 film	 +  +  + 	1	1	0.25	0.75
1 film	 + 	0	1	0	1
1 film	 + 	1	0	1	0

Following the methodology set out in Table 1, a film shot by two women and a man would be 1 *film with female directors* but 0.666 *films by female directors* (as well as 1 film with male directors and 0.333 films by male directors). Conversely, a film directed by three men and a woman would be 1 *film with female directors* and 0.25 *films by a female director* (as well as 1 *film with male directors* and 0.75 *films by male directors*).

3.4 Type of production: national v. co-productions

The statistical analysis provided in various reports drawn from the LUMIERE database¹³ tells us that national productions have a different morphology and perform differently from international co-productions. Hence, the analysis aims to substantiate or negate this hypothesis and, in any case, to quantify the differences in this regard when it comes to the gender of the director.

¹³ Kanzler M., (2008), *The circulation of European co-productions and entirely national films in Europe (2001-2007)*, European Audiovisual Observatory/Council of Europe, Strasbourg.

3.5 Country of release: domestic v. foreign

The country of release also plays a role in the attendance figures for a film, as films often perform differently at home and abroad. Hence, the analysis will try to identify whether the gender of the director is one of the components involved in the different patterns shown by films released in either type of territory.

3.6 Growth

Measuring growth is one of the most complex statistical tasks, as there are several ways to proceed, with results varying significantly from one method to the next. Therefore, the first step was to identify the most suitable tool to measure the growth of our two main variables, namely the number of films and the number of admissions in the different proposed scenarios.

The compound annual growth rate (CAGR) would only take into account the initial and final positions, losing the information in between. This method is suitable when the values of any given year are the result of variations of the preceding year's figure (investment, population...). However, this is not the case here, as there is no interdependence between values in consecutive years; in other words, the number of admissions starts from zero every year and is not influenced by previous results. The average annual growth rate (AAGR) seems a more appropriate measure of the evolution of our two main indicators over the ten-year period studied. However, when it comes to the evolution of particular national markets it is common to find a zero value for some of the variables, which makes it impossible to calculate an AAGR. Hence, a comparison between the first and second half of the ten-year period has been chosen as a means of contrasting national situations. In addition, this will allow us to differentiate between those countries marked by constant development and those with a more sporadic growth.

3.7 A view from the top

Finally, the analysis will focus on the top 1% of films by female directors according to the number of admissions so as to identify patterns and gender differences at the top of the box office list, especially when it comes to performance, co-production and distribution abroad. A percentage rather than a fixed number of films seems a more appropriate basis for making gender comparisons since the list of films by male directors is significantly longer than that of films by female directors.

3.8 Comparing countries

As mentioned above, the final basis of the analysis lacked comprehensive attendance figures for some territories with a lower production volume for one or more particular years. Since, except for Russian films, the relative weight of these territories in terms of production and admissions was quite low and their presence did not have a relevant impact on the results of the main indicators analysed, their productions still form part of the pan-European study sample.

When it came to country-by-country analyses, however, coverage gaps in LUMIERE obliged us to remove several production countries, as homogeneity throughout the timespan under analysis is essential when contrasting national realities. Firstly, the 10 territories for which LUMIERE has only scant information were removed (see footnote 12). In addition, Bulgaria, Croatia, Greece, Latvia, Lithuania, Luxembourg and Romania do not appear in the country rankings as there are some minor gaps or methodological changes during the ten-year period.

Furthermore, those countries whose production volume was not representative enough could not form part of these comparisons. A threshold of one average film by a female director a year during the analysed period was established for that effect. Hence, the Slovak Republic, Estonia, Iceland and

Slovenia are not included in this part of the analysis either, leaving us with 19 production territories for the country-by-country comparative analysis.

Notwithstanding all of this and for the sake of simplicity, the number of admissions to films from any of the 19 production countries considered for this second part of the analysis is based on the same geographical scope as the pan-European part of the study; that is, the admissions recorded in Europe except for the Russian market. The same applies for the European averages, which have not been recalculated for this second part of the study and still refer to films produced in Europe (except in the Russian Federation) and take into account admissions obtained in all European markets minus the Russian Federation.

3.9 Audiences and gender

A comprehensive pan-European analysis of these two variables is nothing short of impossible owing to the lack of audience figures by gender in most of Europe. Nonetheless, the trends observed in some countries can offer some hints as to the current situation. For example, the British Film Institute (and before it, the UK Film Council) has been collecting admission figures for the top 20 and top 20 local films in the UK by gender of the cinema-goer. The share of cinema-goers of either gender was almost equal, with males representing 52%¹⁴ of the audience of the above-mentioned films in 2012, well in line with the figures from previous years. Nonetheless, male and female cinema-goers showed a strong bias towards certain films, with each gender representing almost 75% of the audience in the most extreme cases.¹⁵ Furthermore, the analysis of these figures over time confirmed some patterns, linking genre and gender of the cinema-goer as well as genre and gender of the director.

Even if audience analysis is beyond the scope of this report, it seems important to flag up the possible link between the gender of the director and the gender of the cinema-goer. With this hypothesis as a starting point, the next logical step would be to identify whether it is due to a natural tendency of directors of either gender to focus on certain topics and genres; or whether it could simply reflect a certain prejudice amongst part of the industry when choosing the director of a film. Moreover, it has also been suggested that some common elements in the narrative style singular to directors of either gender might make their work more appealing to an audience of a determined gender. However, this theory would be difficult to prove in a collective work such as film production where the film director, although crucial, is just one of the many components of a bigger creative team. Most probably the final answer includes all the elements presented here plus many others, but to paraphrase Michael Ende: “that’s another story and shall be told another time”.

¹⁴ BFI, (2013), *BFI Statistical Yearbook - 2013*, London, UK. p.169:
<http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-statistical-yearbook-2013.pdf>

¹⁵ Ibid. p.170.

II A pan-European approach

4 Production volume and gender

4.1 The overall picture

According to LUMIERE, 9 072 European films were produced between 2003 and 2012 and released in at least one European territory between 2003 and 2013. Female directors participated in 1 592 productions, 86.2% of which (1 372 films) were directed by female directors alone. Over the same period, their male counterparts were involved in 7 595 films, 96.9% of which (7 357) were shot by male directors alone. 239 films involved joint direction by men and women, 193 of which were equal (50/50) collaborations. This latter figure represents a significant share of the films with female directors (12.1%), but a marginal share of those with male directors (2.5%).

Table 2 Films by gender of the director (2003 to 2012)
By number of films

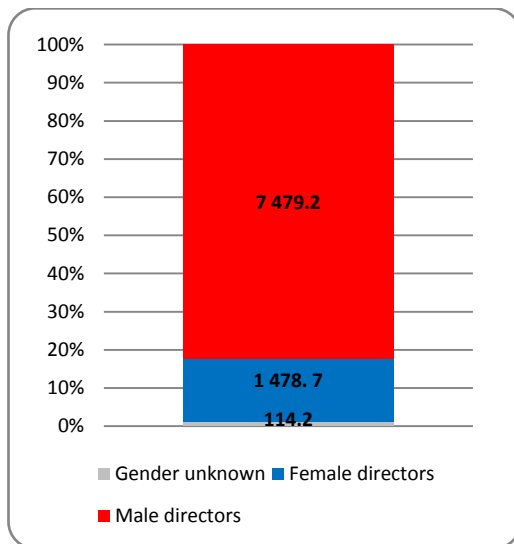
	Total	With female directors	With male directors	With director of unidentified gender	Only by male directors	Only by female directors	Gender parity co-direction	By female directors	By male directors	By directors of unidentified gender
Films	9 072	1 592	7 595	124	7 357	1 372	193	1 479	7 479	114
% of total		17.55%	83.72%	1.37%	81.10%	15.12%	2.13%	16.30%	82.44%	1.26%

Source: OBS LUMIERE

However, the main indicator upon which this analysis is based is the number of films in proportion to the gender of the director (last three columns of Table 2). As explained in point 2.3, the number of films and admissions have been calculated on a pro-rata basis according to the level of involvement of each director. This results in 82.4% of the films (7 479 films) being directed by men, whereas 16.3% (1479) were directed by women; the remaining 1.3% (114 films) being films for which the director's gender could not be identified for the purposes of this study.

Figure 8 Number of European films by gender of the director

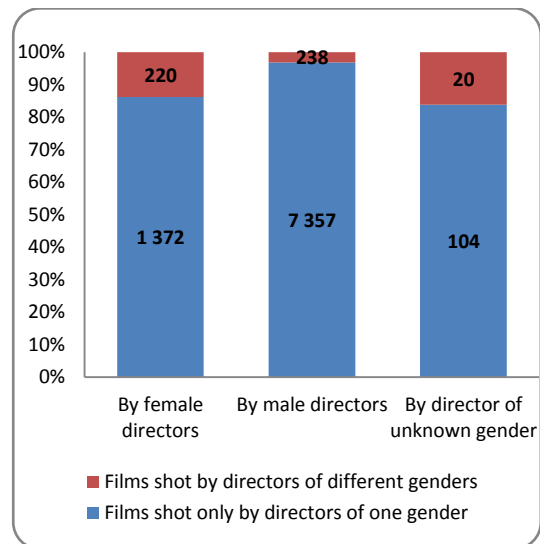
Produced between 2003 and 2012



Source: OBS LUMIERE

Figure 9 Number of European films by gender of the director

Produced between 2003 and 2012, in proportion to the level of involvement of each director

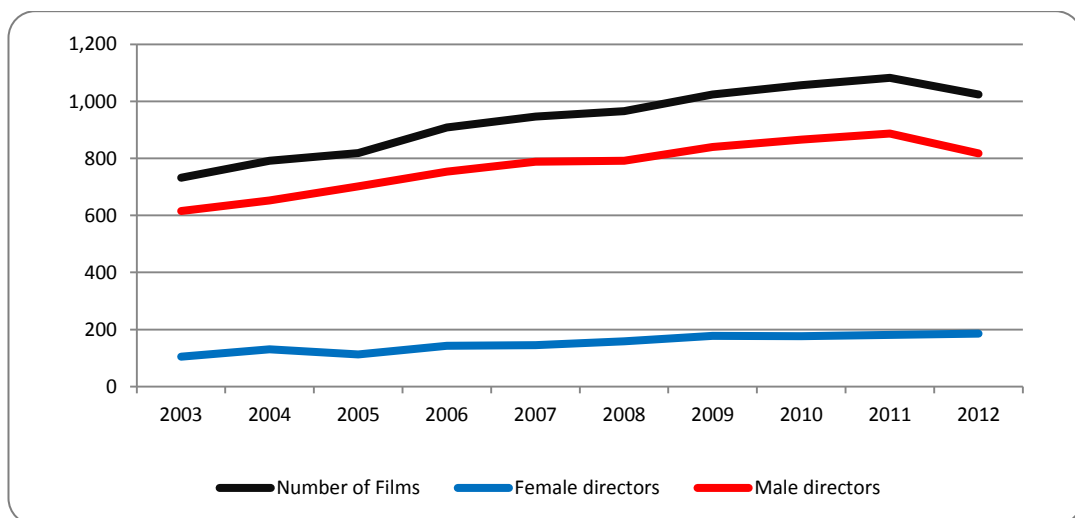


Source: OBS LUMIERE

Over time, there is a clear increase in the number of films produced during the period under analysis. This is partly due to improvements in the coverage rate of LUMIERE year after year but, most notably, it reflects an overall growth in most European industries, which applies for both male and female directors. Between 2003 and 2012 the number of films by female directors grew by 77%, compared to the 32.8% increase of films by male directors, representing an average annual growth of 6.6% and 2.7% respectively. If we compare the first and the last five years of the period we can observe that the number of films by female directors grew 19.2% more than those by male directors – an increase of 35.69% for female directors as compared to 19.53% for male directors – illustrating that the volume of films by female directors increased even more quickly towards the second half of the decade.

Figure 10 Number of European films released by gender of the director and year of production (2003 to 2012)

By number of films



Source: OBS LUMIERE

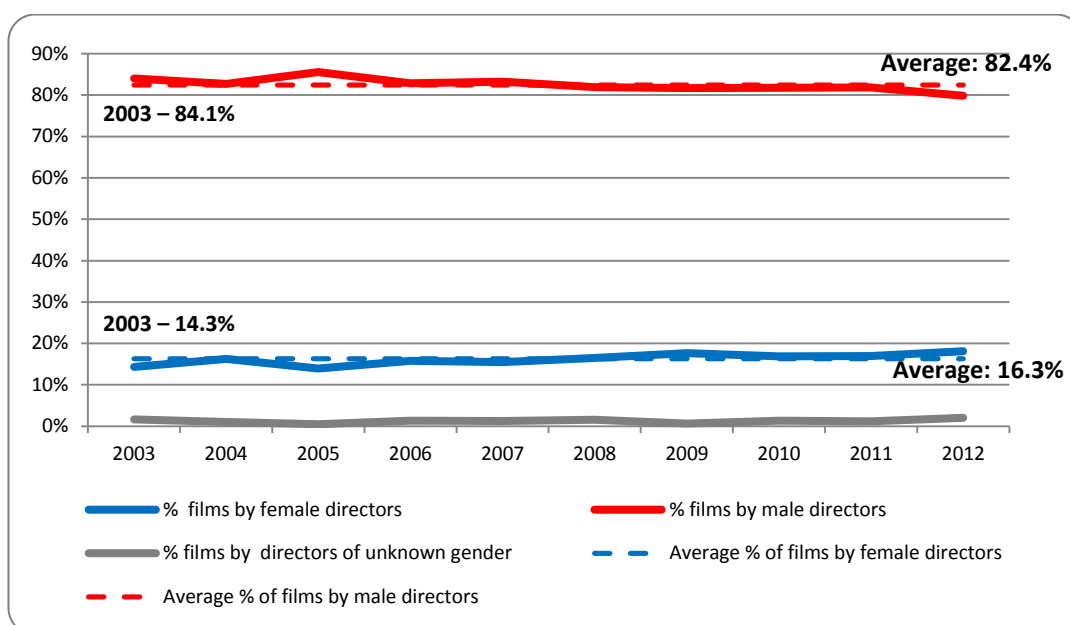
Another interesting indicator is the median position of films with male directors within the list of titles ranked by number of admissions, which was # 4 577.5 – much higher than the median position of films by female directors, which was # 5 568.5.

Although these figures already provide an overall idea of the production trend according to gender, a more accurate descriptor of the evolution of the specific weight of each gender in European filmmaking would be the share of films by directors of each gender over time.

4.2 Evolution of the status quo

As mentioned above, 16.3% of the films produced during the period 2003 to 2012 were shot by female directors whereas 82.4% were directed by men. As can be seen in the graph below, no major peaks and troughs occurred during this period, with the percentage of female directors ranging between a high of 18.1% in 2012 and a low of 13.7% in 2005.

Figure 11 Evolution of the share of European films by gender of the director (2003 to 2012)
As a %



Source: OBS LUMIERE

To sum up, although there has been a general trend in growth, the number of films by female directors has been increasing more quickly (within its category) than the number of films by male directors. However, the enormous gap between films produced by filmmakers of each gender at the outset has prevented any shift in the existing status quo. As a matter of fact, should the yearly average growth rates of films by female and male directors remain constant at 6.6% and 2.7% respectively (see previous point), it would not be until the second half of the century that parity in terms of number of films produced would be achieved - as it would take 51 years for women to catch up with their male counterparts.

5 Gender and box office performance

5.1 Cinema attendance by gender of the director

European films produced between 2003 and 2012 generated 3 192.12 million admissions in European theatres, 90.9% of which were for films with at least one male director (2 902.64 million admissions), while 8.9% of the admissions were for films with at least one female director (283.83 million). Films shot by directors of each gender on a 50/50 basis accounted for 1.7% of the admissions.

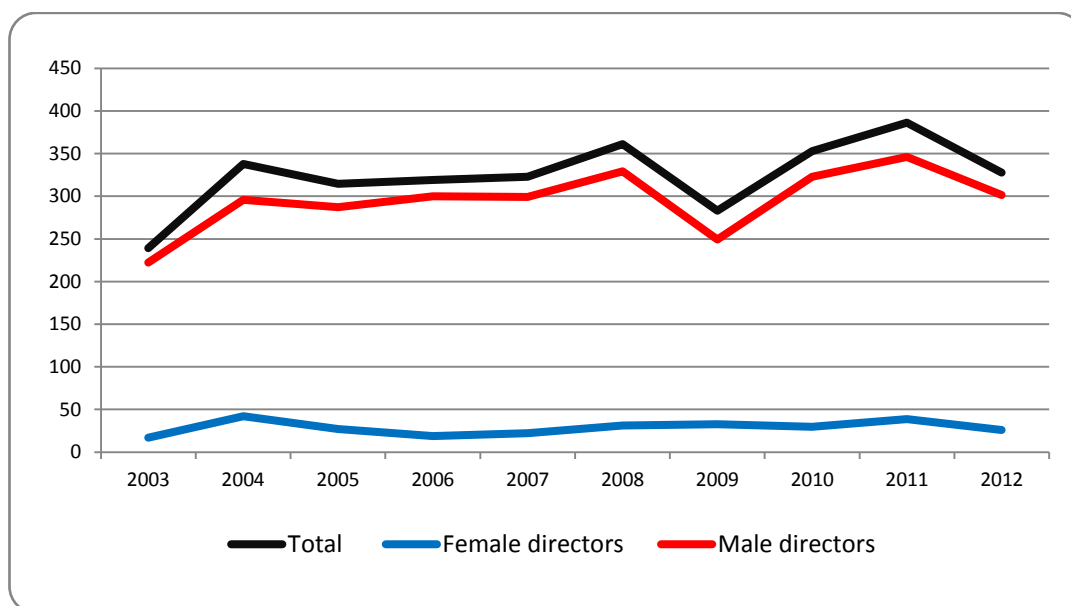
Table 3 Number of admissions by gender of the director of the film (2003 to 2012)
In millions

	Total	With female directors	With male directors	With directors of unknown gender	Gender parity productions	Only by female directors	Only by male directors	By female directors	By Male directors	By directors of unknown gender
Admissions	3 192.1	312.1	2 932.2	7.3	55.1	255.8	2 872.7	283.8	2 902.6	5.7
% of the total		9.8%	91.9%	0.2%	1.7%	8%	90%	8.9%	90.9%	0.2%

Source: OBS LUMIERE

However, the main indicator used for this analysis is the number of admissions in proportion to the gender of the director(s). Following this model, 8.9% of admissions (283.8 million) were for films directed by women and 90.9% (2 902.64 million) for films directed by men, the remaining 0.2% relating to films by directors whose gender was not identified for this study. As with the number of films produced, an overall upward trend can be observed. In this case, however, there are significant ebbs and flows, mainly due to the impact of certain particular box office blockbusters.

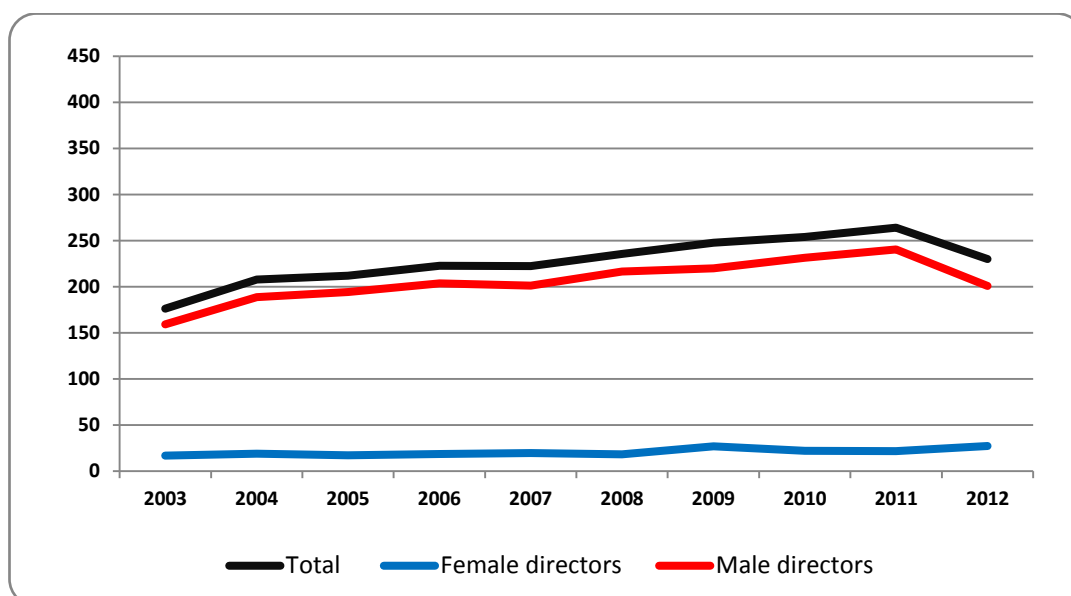
Figure 12 Admissions to European films by gender of the director (2003 to 2012)
In millions



Source: OBS LUMIERE

Were we to exclude the top 1% films by number of admissions by directors of either gender from the study sample, then the trend would be smoother, well in line with the previous indicator.

Figure 13 Admissions to European films by gender of the director excluding the top 1% productions by admissions by directors of each gender (2003 to 2012)
In millions

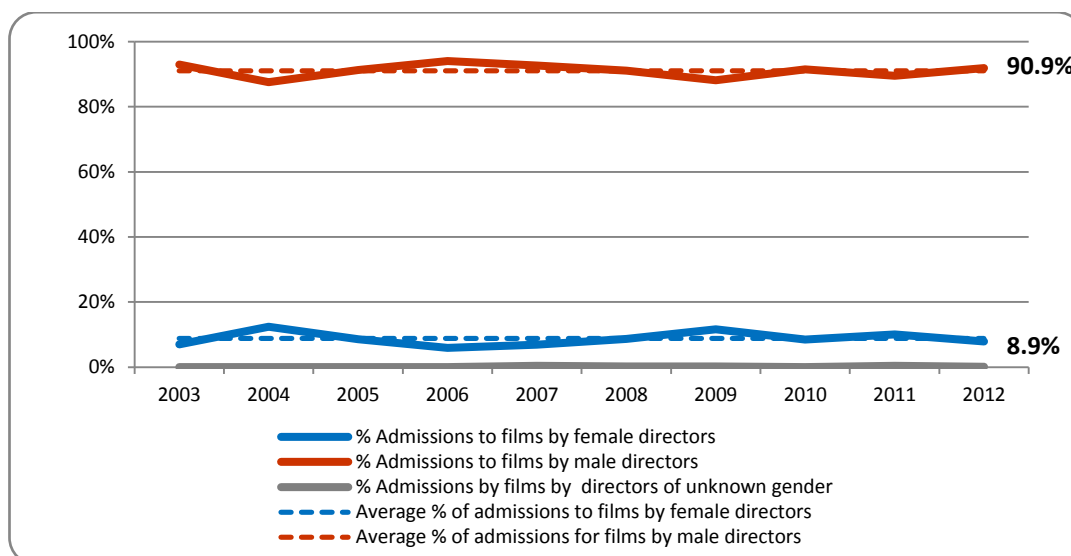


Source: OBS LUMIERE

5.2 Evolution of the status quo

Again, comparing proportional shares is more enlightening than contrasting pure aggregated figures. 90.9% of the total admissions were for films directed by men whereas 8.9% were for films directed by women; the remaining 0.2% going to films where the gender of the director could not be identified.

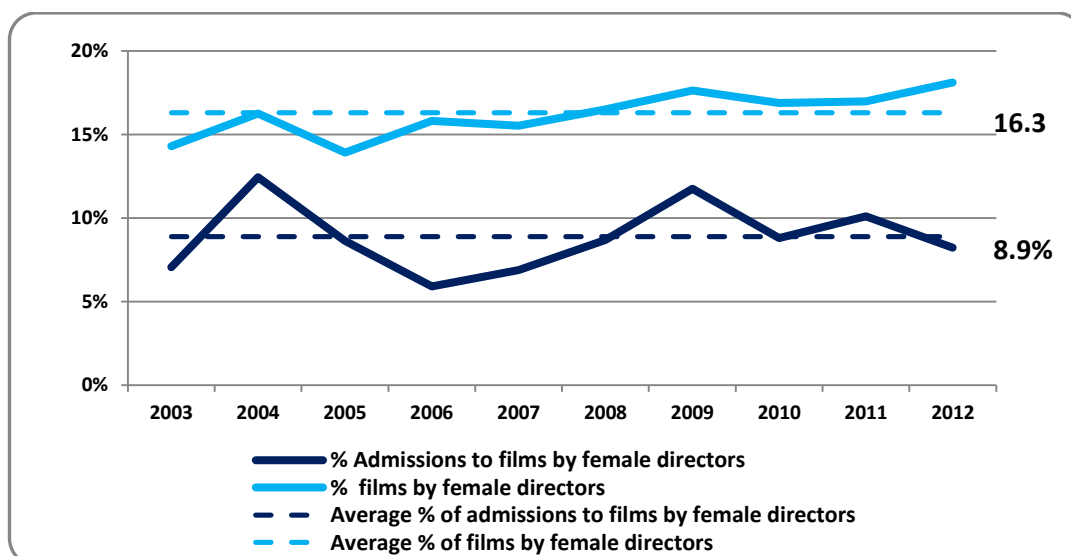
Figure 14 Share of admissions to European films by gender of the director (2003 to 2012)
As a percentage



Source: OBS LUMIERE

The proportion of admissions and number of films by gender of the director presents some relevant differences. The most obvious being the important distance between both indicators - 8.9% compared to 16.3% respectively.

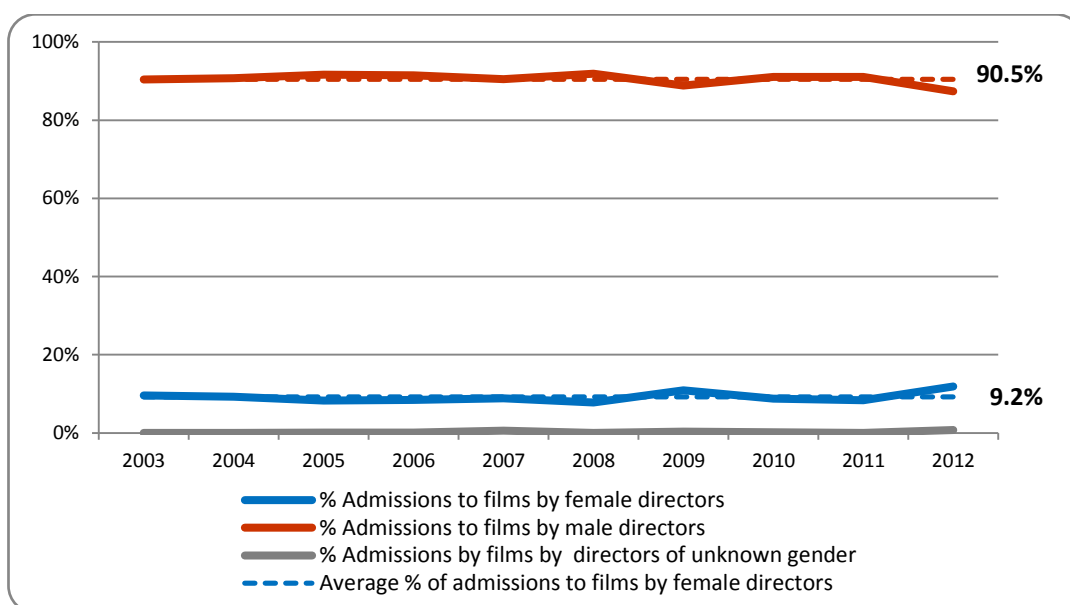
Figure 15 Comparison of share of films and share of admissions by gender over time (2003 to 2012)
As a percentage



Source: OBS LUMIERE

In addition, the peaks and troughs over time are slightly more acute, with admissions to films by female directors ranging between a peak of 12.4% in 2004 and a low of 5.9% in 2006. It should be noted that the most successful European film by a female director during the period under analysis, "Bridget Jones: The Edge of Reason", was shot in 2004. In any case, there have not been any relevant shifts in the market share of films by directors of either gender during the ten-year period analysed. More importantly, as was the case for the trend by number of films produced, these fluctuations were rather the result of a number of blockbusters by female directors. As a matter of fact, we can observe quite a flat trend when we exclude the top 1% of films shot by directors of either gender from our study sample.

Figure 16 Percentage of admissions to European films by gender of the director excluding the top 1% productions by admissions by directors of each gender (2003 to 2012)



Source: OBS LUMIERE

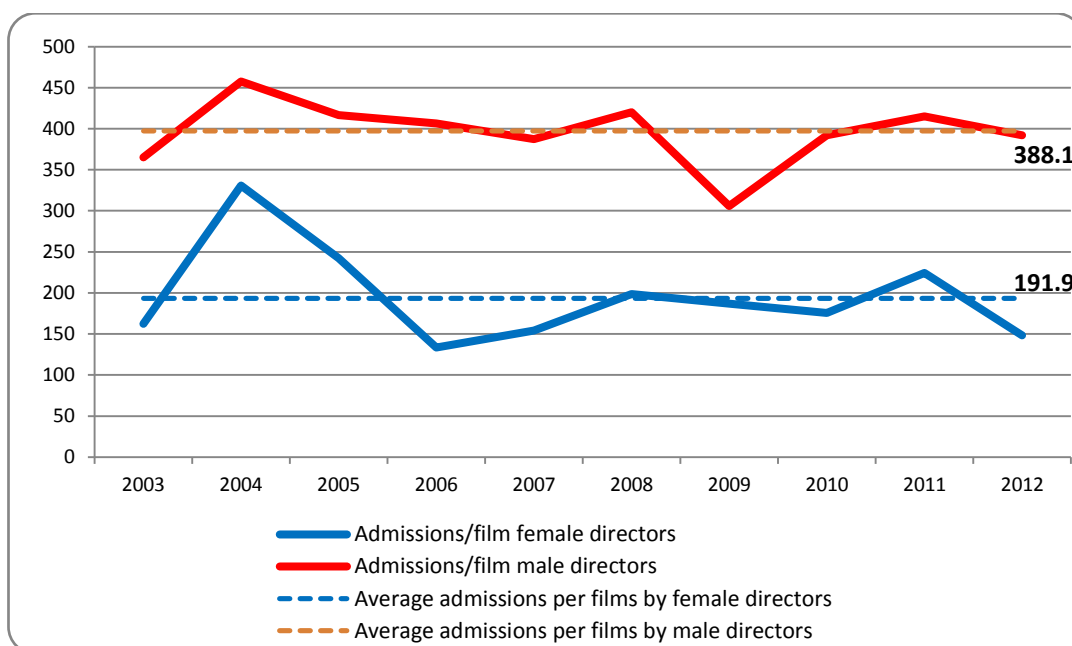
The fact that the gender gap closes slightly when we exclude the top films already gives us an indication that inequality is more acute at the top of the list in terms of numbers of admissions. This will be analysed in further detail in Chapter 7.

Also of particular note is the fact that should the average annual growth rate of admissions to films by male (4.3%) and female directors (14.8%) remain constant, it would take 75 years for the admissions gap by gender of the director to close.

5.3 Average admissions per film

This indicator tells us the average performance of European films in European theatres, which was 351 873 admissions per film over the period 2003 to 2012 – 388 097 admissions per film by a male director compared to 191 954 admissions per film by a female director. In other words, the average film by a male director obtained slightly more than twice the number of admissions (2.02) compared with the average film by a female director.

Figure 17 Average admissions to European films by gender of the director (2003 to 2012)
Per thousand admissions



Source: OBS LUMIERE

However, these figures are far from the median values for films with directors of either gender, which were 41 178 admissions for films with a male director and 20 851 admissions for films with a female director, the median figure for the 9 072 films analysed being 37 211 admissions per film. An average value much higher than its respective median also confirms that a significant portion of admissions come from a few outliers at the top of the list – or, looking at it the other way around, that the vast majority of productions performed well below average.

Another indicator of the significant level of dispersion in the admissions figures comes from a very high average deviation. The average deviation was 541 712 admissions for films with male directors, 269 357 admissions for films with female directors and 512 415 admissions for the total list of films, implying a much higher dispersion of admissions per film by male directors. In other words, films by female directors are much more concentrated around the median value in terms of admissions than films by male directors.

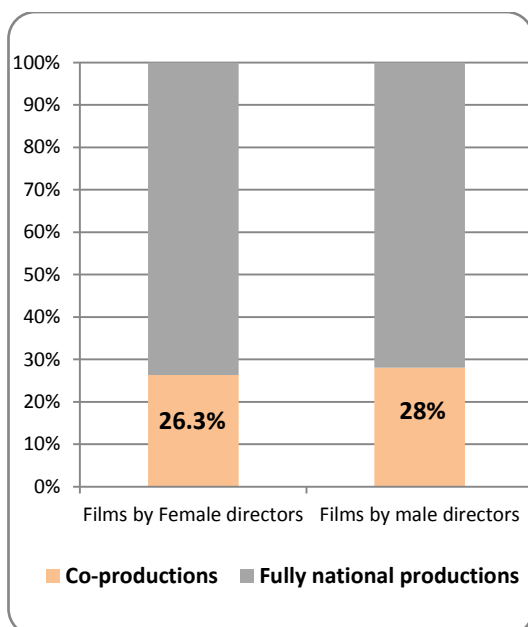
It would be tempting to link attendance figures to success, but we would be jumping to premature, inaccurate conclusions. This would be impossible to prove in most cases as there would be an unknown quantity – the budget of the film. Therefore the performance of films by gender of the director must be taken for what it is worth – nothing more (and nothing less) than an indicator of attendance, not of success. If we wished to measure the success of films by female directors, we would need to compare the budget or production cost with the box office figures generated. Since figures on this former indicator are only disclosed in a number of cases (especially high-budget productions or films with the support of certain public funds which require the production costs to be disclosed), it is not possible to add success or profitability to the list of variables analysed in this report.

6 Local v. international co-productions

One of the questions considered from the outset was whether or not there are gender differences when it comes to the nature of the production: in other words, how likely female directors were to be part of an international co-production as compared to male directors.

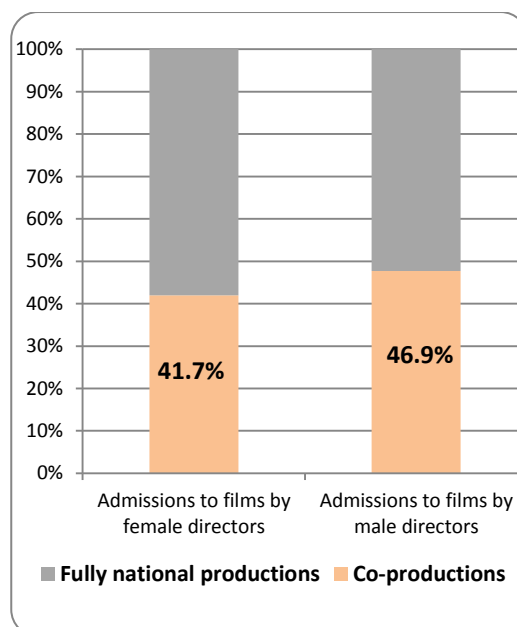
The share of international co-productions within each gender was fairly similar during the period from 2003 to 2012. Female directors shot 389 films with some level of foreign investment – 26.3% of the total, compared to 2 096 by male directors – 28% of the total, only 1.7 percentage points ahead of films by women. It comes as no surprise that national films gained more admissions than international co-productions in absolute terms; what is relevant is that the gap according to gender of the director widens when we look at the share of admissions for international co-productions - 41.7% for films by female directors (119.1 million admissions) v. 46.9% for those shot by men (1 384.5 million admissions) – a difference of 5.2 percentage points.

Figure 18 Percentage of films by nature of production and gender of the director (2003 to 2012)



Source: OBS LUMIERE

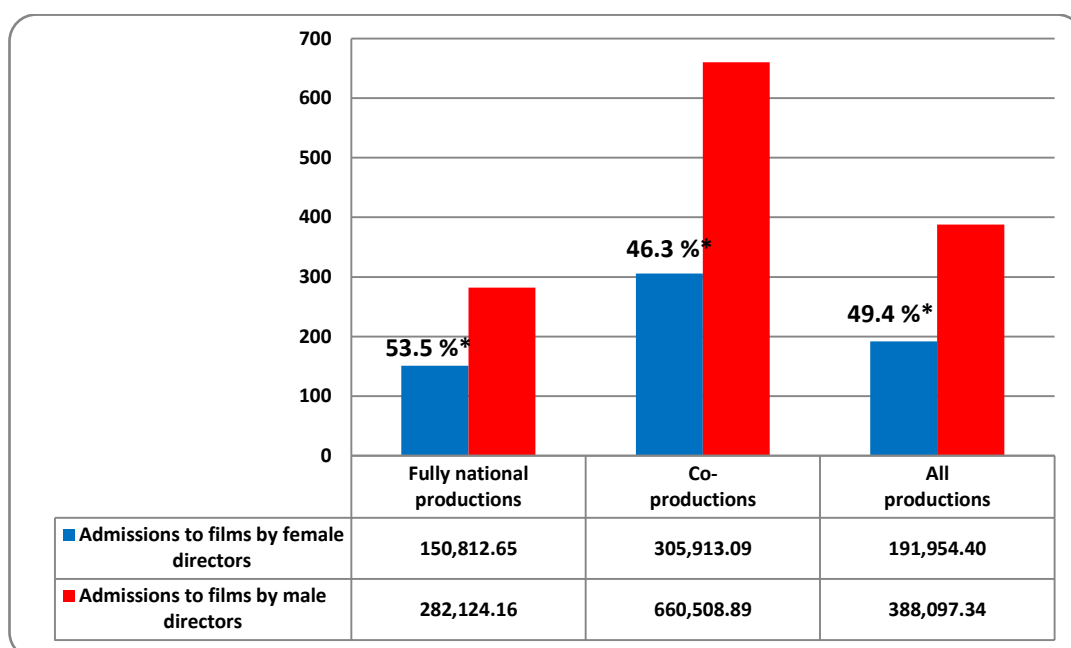
Figure 19 Percentage of admissions by nature of production and gender of the director (2003 to 2012)



Source: OBS LUMIERE

Similar conclusions can be reached from a different perspective. If we take the average number of admissions per national film by a female director (150 182), this was slightly above half the average for national films by male directors (282 124). These two figures more than double when it comes to international co-productions; however, the gender divide grows even greater as is shown in Figure 17, with an average of 305 913 admissions per film by female directors compared to 660 508 admissions to films by male directors. The average figures for all films by male and female directors respectively were 394 816 admissions and 193 240 admissions.

Figure 20 Average admissions per European film by type of production and gender of the director (2003 to 2012)
Per thousand admissions



Source: OBS LUMIERE

* Average admissions/film by female directors expressed as a percentage of the average admissions/film by male directors of the corresponding category.

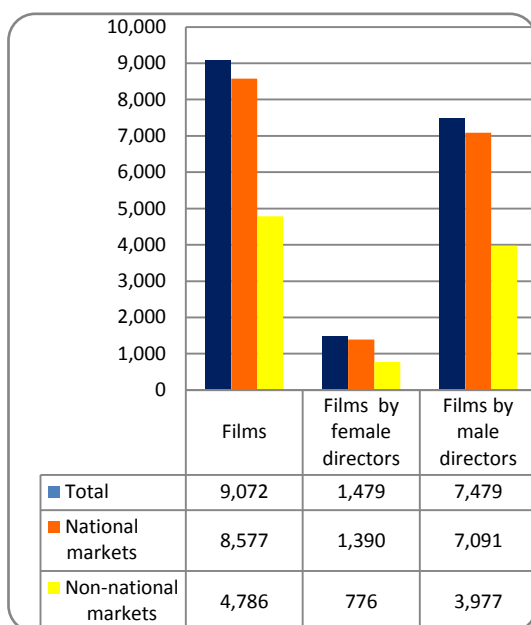
In view of all these indicators, it can be stated that the gender of the director only marginally affects the ability to find international co-producers. It is in the number of admissions that a significant difference can be found. As has often been suggested, this may be due to the lower profile of films directed by women, who would have access to lower budgets and less investment in promotion and marketing; consequently, they would generate a lower turnover at the box office. However, the lack of systematic budget figures for the films analysed makes it impossible to compare the morphology of films by gender of director, thereby preventing us from confirming or dismissing this recurrent argument. What is clear, however, is that the gender divide by admissions grows when we focus on international co-productions. Suffice it to compare the average performance of female-directed films expressed as a share of the average male-directed films, which was 53.5% for national productions and 46.3% for international co-productions. As indicated in section 5.3, significant differences in box office performance according to the gender of the director should not lead to conclusions regarding the success of the films in question.

7 Domestic v. international releases

A series of factors determine whether a film is likely to get an international release or have an exclusively domestic distribution. Some obvious variables which impact on this include: language of production, country(ies) of production, universality of the story, prestige and appeal of the cast and main crew, among many other more or less predictable factors. However, does the gender of the director play a decisive role in the prospects of a film being released outside the boundaries of its countries of origin?

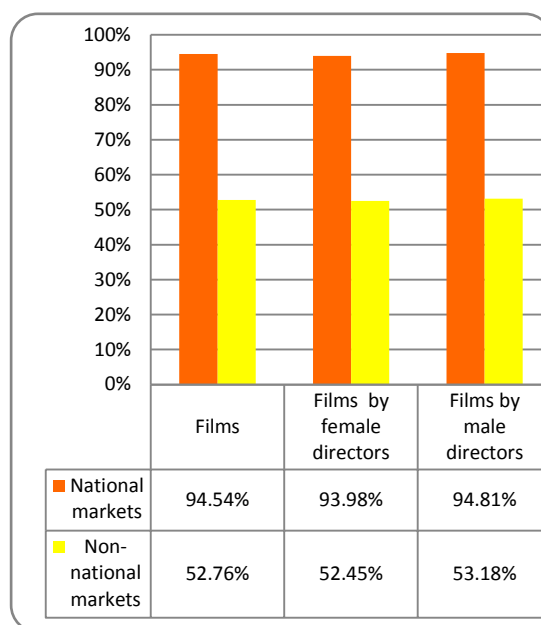
Most European productions analysed in this study had a domestic release (8 577 of the 9 072 films produced between 2003 and 2012), but only 52.8% of them (4 786 titles) gained international distribution within Europe. Breaking down the figures according to the gender of the director indicates no significant relative difference, as the percentage of titles with at least one foreign release in Europe was 52.5% for films directed by women and 53.2% for films directed by men.

Figure 21 European films released in national and foreign markets by gender of the director (2003 to 2012)



Source: OBS LUMIERE

Figure 22 Share of European films by release territory within each gender category (2003 to 2012)

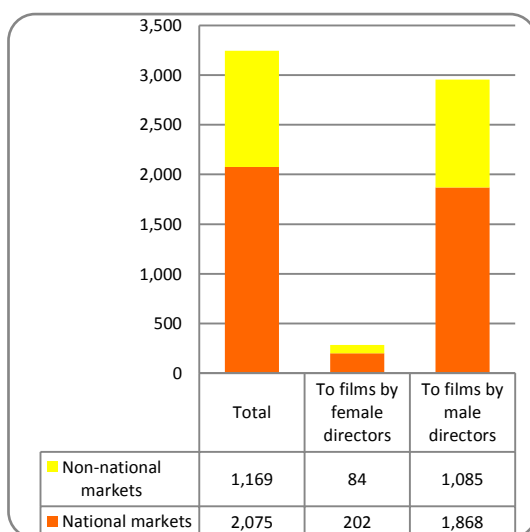


Source: OBS LUMIERE

However, the gender component becomes more apparent when we look at the share of admissions for foreign markets within each gender category, with 29.4% of the tickets sold for films by female directors coming from non-national European markets compared to 36.7% in the case of films by male directors. Despite a difference of just 0.7 percentage points in terms of percentage of films with international distribution in Europe, the gender divide grows up to 7.3 percentage points when we look at the share of admissions in the respective markets according to each gender category.

Figure 23 Admissions to European films released in national and foreign markets by gender of the director (2003 to 2012)

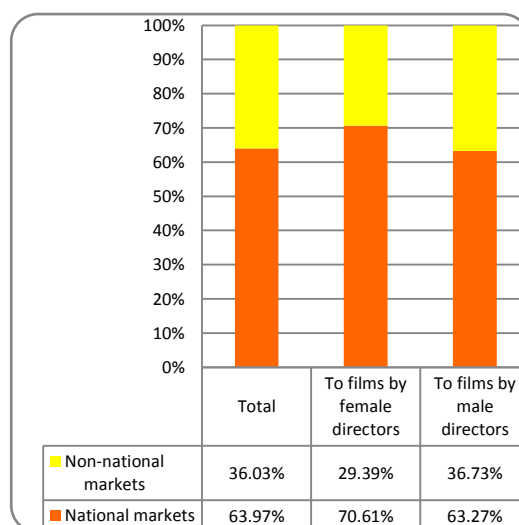
By million admissions



Source: OBS LUMIERE

Figure 24 Share of admissions to European films by territory of release within each gender category (2003 to 2012)

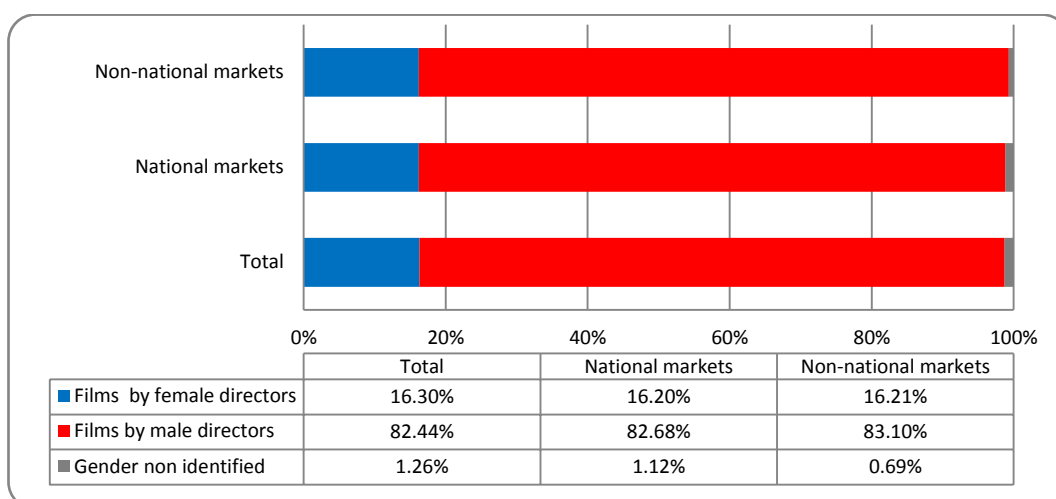
As a percentage



Source: OBS LUMIERE

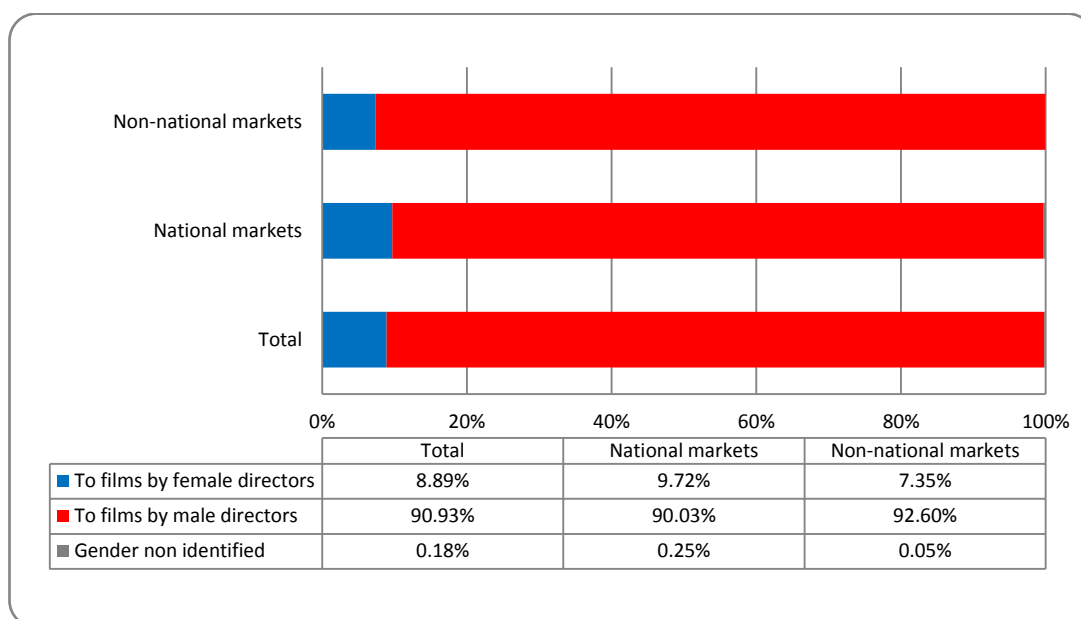
In terms of relative share, which is a much more accurate indicator, the difference between national and foreign markets was a not inconsiderable 2.44 percentage points for admissions to films by female directors. Although the relative proportion of films by female directors was almost identical in national and foreign markets – 16.2%, only 7.3% of the admissions in foreign markets came from female-directed films as compared to 9.7% in domestic markets.

Figure 25 Share of European films by gender of the director within each type of market (2003 to 2012)



Source: OBS LUMIERE

Figure 26 Share of admissions to European films by gender of the director within each type of market (2003 to 2012)



Source: OBS LUMIERE

As with the analysis by nature of production, it would be hazardous to assume that the below-average performance of films by female directors abroad is linked to their success, given that the average budget of the films, and several other factors, remain unknown variables.

8 Comparisons at the top

In order to compare the top productions by directors of either gender in a reliable way, figures will be contrasted in absolute and relative terms. A percentage (1% in this case) rather than a fixed number of films will form the sample of the analysis; therefore the 75 (approximately 1% of the total 7 479 films in this category) best-performing films by male directors have been compared with the 15 (approximately 1% of the 1 479 films in its category) highest-grossing productions by their female counterparts. The most remarkable difference lies in the proportion of these top films within their respective reference groups, with the top 1% by male directors representing 38.3% of the admissions to films in this category compared to 23.7% in the case of films shot by women. This shows that admissions are much more concentrated at the top for films directed by men than for those directed by women.

Furthermore, 48.2% of admissions to top films by female filmmakers came from foreign markets, whereas the figure was 57% for the top films by their male counterparts. Since the top films circulate much more frequently and with better results abroad than the average production, it is only to be expected that these figures will be much higher than the corresponding ones for the entire list of films (28.9% and 35.6% for films by women and men respectively). What is remarkable, however, is the fact that the gender gap widened at the top for this indicator, meaning that the share of admissions for films by female directors is even lower at the top than on average.

As explained in section 5.3, the ratio of admissions per film by a female director to admissions per film by a male director is 1:2.02; this gap increases at the top, reaching approximately 1:3.55. More precisely, the top 1% films by male directors achieved an average of 12.64 million admissions per film compared to 4.97 million in the case of female directors.

8.1 Top 50 European films

The most performing European films in Europe during the period 2003 to 2012 in terms of box office admissions were mainly British productions with American investment,¹⁶ followed by French films. As we move down the list we also find German, Spanish and Swedish titles, with no other nationality listed as the main producer. In addition, only 14 titles are national productions.

Table 4 Top 50 European films (produced between 2003 and 2012) by admissions in Europe

#	Title	Director	Gender	Production year	Country of origin	Admissions
1	Skyfall	Sam Mendes	M	2012	GBinc / US	46 341 860
2	Harry Potter and the Goblet of Fire	Mike Newell	M	2005	GB INC / US	44 402 830
3	Intouchables	Olivier Nakache, Eric Toledano	M, M	2011	FR	42 701 546
4	Harry Potter and the Prisoner of Azkaban	Alfonso Cuarón	M	2004	GBinc/ US	40 558 201
5	Harry Potter and the Deathly Hallows: Part 2	David Yates	M	2011	GBinc/ US	39 887 495
6	Harry Potter and the Order of the Phoenix	David Yates	M	2007	GBinc / US	38 686 198
7	Harry Potter and the Half-Blood Prince	David Yates	M	2008	GBinc / US	35 624 681
8	Harry Potter and the Deathly Hallows: Part 1	David Yates	M	2010	GBinc / US	35 567 622
9	Casino Royale	Martin Campbell	M	2006	GBinc / US / DE / CZ	29 526 311
10	Quantum of Solace	Marc Forster	M	2008	GBinc / US	27 822 243

¹⁶ Such "inward investment films" are indexed in LUMIERE as GBinc/US.

11	Bienvenue chez les Ch'tis	Dany Boon	M	2008	FR	26 290 696
12	The King's Speech	Tom Hooper	M	2010	GB in / US	20 761 489
13	Bridget Jones: The Edge of Reason*	Beeban Kidron	F	2004	GB / US / FR / DE / IE	20 419 559
14	Slumdog Millionaire	Danny Boyle, Loveleen Tandan	M, F	2008	GB	17 789 875
15	Love Actually	Richard Curtis	M	2003	GB / US	16 284 453
16	Mr. Bean's Holiday	Steve Bendelack	M	2007	GB / FR / DE / US	15 528 019
17	Johnny English	Peter Howitt	M	2003	GB / US	14 525 773
18	Robin Hood	Ridley Scott	M	2010	GB INC / US	14 062 717
19	Astérix aux jeux olympiques	Frédéric Forestier, Thomas Langmann	M, M	2008	FR / DE / ES / IT	14 023 968
20	Wallace & Gromit in The Curse of the Were-Rabbit	Nick Park, Steve Box	M, M	2005	GB inc / US	13 977 869
21	Les choristes	Christophe Barratier	M	2004	FR / CH	12 209 671
22	Kingdom of Heaven	Ridley Scott	M	2005	GB inc / DE / ES / US	12 160 685
23	Perfume: The Story of a Murderer	Tom Tykwer	M	2006	DE / ES / FR	11 632 207
24	Taken 2	Olivier Megaton	M	2012	FR	11 111 480
25	Les Bronzés 3: amis pour la vie	Patrice Leconte	M	2006	FR	11 078 264
26	Lo imposible	Juan Antonio Bayona	M	2012	ES	10 967 246
27	Good Bye, Lenin!	Wolfgang Becker	M	2003	DE	10 928 646
28	(T)Raumschiff Surprise - Periode 1	Michael Herbig	M	2004	DE	10 763 242
29	Rien à déclarer	Dany Boon	M	2010	FR / BE	10 257 494
30	Der Untergang	Oliver Hirschbiegel	M	2004	DE / IT	9 837 728
31	Johnny English Reborn	Oliver Parker	M	2011	GB / FR / US	9 772 688
32	Les Misérables	Tom Hooper	M	2012	GB / US	9 699 944
33	Alexander	Oliver Stone	M	2004	GB / FR / NL / US	9 608 923
34	Arthur et les Minimoys	Luc Besson	M	2006	FR	8 720 643
35	Flushed Away	David Bowers, Sam Fell	M, M	2006	GBinc / US	8 713 525
36	Volver	Pedro Almodóvar	M	2006	ES	8 526 747
37	The Inbetweeners Movie	Ben Palmer	M	2011	GB	8 257 054
38	La Môme	Olivier Dahan	M	2007	FR / CZ / GB	7 995 860
39	Pride and Prejudice	Joe Wright	M	2005	GB / FR / US	7 940 105
40	Sieben Zwerge	Sven Unterwaldt Jr.	M	2004	DE	7 901 072
41	Män som hatar kvinnor	Niels Arden Oplev	M	2009	SE / DK / DE	7 856 518
42	The Artist	Michel Hazanavicius	M	2011	FR / BE	7 673 681
43	Taxi 3	Gérard Krawczyk	M	2003	FR	7 593 936
44	Calendar Girls	Nigel Cole	M	2003	GB inc / US	7 516 941
45	Nanny McPhee	Kirk Jones	M	2005	GB / US / FR	7 499 166
46	Le petit Nicolas	Laurent Tirard	M	2009	FR / BE	7 482 929
47	Match Point	Woody Allen	M	2005	GB inc / US / LU	7 443 762
48	Das Leben Der Anderen	Florian Henckel von Donnersmarck	M	2006	DE	7 420 341
49	Fetih 1453	Faruk Aksoy	M	2012	TR	7 019 135
50	Arthur Christmas	Barry Cook, Sarah Smith	M, F	2011	GBinc/ US	6 970 435

Source: OBS LUMIERE

* Films with the participation of female directors appear in bold.

8.2 Top 50 European films by female directors

The pattern at the very top of the top 50 films with female directors is quite similar to that of the overall top 50 listed above, basically containing British productions with or without American investment. The presence of French films is much more significant here than in the list of films by directors of either gender, accounting for more than half of the titles (26 compared to only 12 in the overall top 50 list). The Russian Federation, Germany, Turkey and Denmark are also represented in this list as main production countries. Also of note is the fact that 9 titles had men and women working jointly as directors. Furthermore, the trend is quite different as regards the nature of the production when it comes to female directors, with 31 national productions ranking within the top 50, as compared to only 15 among films by male directors.

High-performing films by directors of each gender also differ in their distribution within the list. While the top 50 films shot by men are mainly packed at the top of the overall list by admissions, with a median ranking position at #26.5, the top 50 films by female directors was far more dispersed, with a median ranking position of #321.

Table 5 Top 50 European films with female directors (produced between 2003 and 2012) by admissions in Europe

#	Overall #	Title	Director	Gender	Production year	Country of origin	Admissions
1	13	Bridget Jones: The Edge of Reason	Beeban Kidron	F	2004	GB / US / FR / DE / IE	20 419 559
2	14	Slumdog Millionaire	Danny Boyle, Loveleen Tandan	M, F	2008	GB	17 789 875
3	50	Arthur Christmas	Barry Cook, Sarah Smith	M, F	2011	GBinc / US	6 970 435
4	61	The Iron Lady	Phyllida Lloyd	F	2011	GB / FR	6 095 384
5	68	Nanny McPhee and the Big Bang	Susanna White	F	2010	GB / US / FR	5 685 161
6	107	StreetDance 3D	Max Giwa, Dania Pasquini	M, F	2010	GB	4 319 731
7	116	LOL (Laughing Out Loud) ®	Lisa Azuelos	F	2008	FR	4 087 655
8	130	Je vous trouve très beau	Isabelle Mergault	F	2005	FR	3 892 167
9	145	Coco avant Chanel	Anne Fontaine	F	2009	FR	3 754 725
10	165	One Day	Lone Scherfig	F	2011	GBinc / US	3 295 120
11	179	La rafle	Roselyne Bosch	F	2010	FR / DE / HU	3 126 931
12	192	Die weiße Massai	Hermine Huntgeburth	F	2005	DE	2 925 621
13	199	Les infidèles	Fred Cavayé, Emmanuelle Bercot	M, F	2012	FR	2 846 348
14	201	Palais royal!	Valérie Lemercier	F	2005	FR / GB	2 804 417
15	237	Enfin veuve	Isabelle Mergault	F	2007	FR	2 493 350
16	239	Comme une image	Agnès Jaoui	F	2004	FR / IT	2 482 690
17	243	Polisse	Maiwenn	F	2011	FR	2 452 250
18	251	Persepolis	Vincent Paronnaud, Marjane Satrapi	M, F	2007	FR	2 343 533
19	259	Kirikou et les bêtes sauvages	Michel Ocelot, Bénédicte Galup	M, F	2005	FR	2 300 131
20	262	Allahin Sadik Kulu: Barla	Orhan Öztürk Esin	F	2011	TR	2 271 302

21	274	De l'autre côté du lit	Pascale Pouzadoux	F	2009	FR	2 181 136
22	277	Fauteuils d'orchestre	Danièle Thompson	F	2006	FR	2 166 845
23	291	Les soeurs fâchées	Alexandra Leclère	F	2004	FR	2 069 378
24	299	Mariages!	Valérie Guignabodet	F	2004	FR	2 014 588
25	313	Desert Flower	Sherry Horman	F	2009	DE / AT / FR	1 961 791
26	329	Le code a changé	Danièle Thompson	F	2009	FR	1 872 478
27	334	Almanya - Willkommen in Deutschland	Yasemin Samdereli	F	2011	DE	1 853 914
28	349	Le hérisson	Mona Achache	F	2009	FR / IT	1 819 546
29	350	Bride and Prejudice	Gurinder Chadha	F	2004	GB / US	1 816 297
30	362	Tout pour plaire	Cécile Telerman	F	2005	FR / BE	1 751 485
31	365	Olé!	Florence Quentin	F	2005	FR	1 750 333
32	382	StreetDance 2	Max Giwa, Dania Pasquini	M, F	2012	GB / DE / IT	1 683 517
33	414	18 ans après	Coline Serreau	F	2003	FR	1 589 114
34	426	Bibi Blocksberg und das Geheimnis der blauen Eulen	Franziska Buch	F	2004	DE	1 547 301
35	443	Happily N'Ever After	Yvette Kaplan, Paul Bolger	F, M	2007	DE	1 498 466
36	452	2 Days in Paris	Julie Delpy	F	2007	FR / DE	1 476 414
37	453	Saint-Jacques... La Mecque	Coline Serreau	F	2005	FR	1 475 521
38	458	Mince alors!	Charlotte de Turckheim	F	2012	FR	1 458 621
39	459	Nativity 2: Danger in the Manger!	Debbie Isitt	F	2012	GB	1 454 189
40	463	Tout ce qui brille	Géraldine Nakache, Hervé Mimran	F, M	2010	FR	1 449 540
41	467	Le Prix à payer	Alexandra Leclère	F	2007	FR	1 436 345
42	470	Caramel	Nadine Labaki	F	2007	FR / LB	1 421 292
43	482	Maria, Ihm schmeckt's nicht!	Neele Leana Vollmar	F	2009	DE / IT	1 400 387
44	498	An Education	Lone Scherfig	F	2009	GBinc / US	1 358 953
45	500	Angus, Thongs and Full-Frontal Snogging	Gurinder Chadha	F	2008	GBinc / US / DE	1 357 559
46	514	Kirschblüten - Hanami	Doris Dörrie	F	2008	DE	1 324 412
47	517	Love Is All You Need	Susanne Bier	F	2012	DK / SE / FR / DE / IT	1 317 187
48	518	Les sentiments	Noémie Lvovsky	F	2003	FR	1 316 777
49	528	Die wilden Hühner	Vivian Naefe	F	2006	DE	1 288 333
50	529	In Darkness	Agnieszka Holland	F	2011	PL / DE / CA	1 288 047

Source: OBS LUMIERE

*Only films with equal or majority participation of female directors have been included.

Films which are not 100% directed by women appear in bold.

In an exercise of extreme simplification, we can state that the vast majority of films directed exclusively by women in the previous list fulfil several of the following conditions:

1. They have a female protagonist (or concentrate on female characters);
2. The story is told through the eyes of a female narrator (be it the protagonist, another character or a third-person narrator);
3. The film deals with romance and relationships

Very few films falling within this typology are to be found among the top productions by male directors. This would be an argument in favour of the hypothesis that female directors are not given the opportunity to direct those films which appear to have more prospects of becoming blockbusters, but only projects that are supposed to be aimed at a female audience. Whether this happens because women are not entrusted with the directing of such high-budget projects or is the result of prejudice as to the kinds of stories women can tell is well beyond the scope of our analysis. Besides, an alternative interpretation could be that the reason for this imbalance lies with female directors themselves, as they lean towards more personal, intimate projects rather than huge mega-productions. What is undeniable, though, is that the prevailing genres found in the list of top box office admissions, such as action, adventure and science-fiction, are rarely found in the top lists of films by female directors.

The lack of comprehensive figures for the budget of each film and the difficulty entailed by defining and categorising films by genre – even if this were possible in the twenty-first century, to begin with, would make it difficult to carry out any kind of qualitative analysis of these hypotheses using a much wider sample of films.

In the case of French productions, it is noteworthy that most female directors of films at the top of the box office list by admissions had become well known as actresses before becoming filmmakers. This suggests that part of the reason for the success of these films by female directors may be linked to their level of recognition among audiences, or looking at it from another angle, it seems that only well-known female personalities manage to access the necessary funding to direct potentially high-grossing productions. However, audience analysis as well as detailed figures on the financing and marketing campaigns of said films would be necessary to prove these hypotheses.

III Contrasting national realities

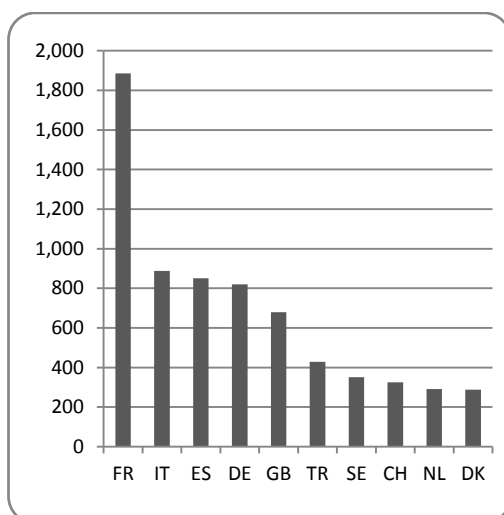
After analysing in detail the European situation as a whole, as well as its evolution over time, and looking at the situation at the top, this study will focus on a comparative analysis of national realities, contrasting absolute and relative figures, as well as trends of growth in the 19 European territories for which enough information is available (see 3.8).

9 Number of films and admissions by country

9.1 Films by female directors

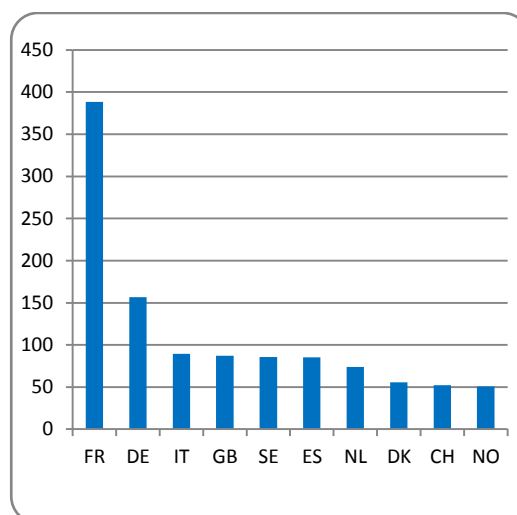
Most countries listed in the ranking by number of films produced also form part of the list of top production countries of films directed by women. Although some of them switch positions and the relative weight of each territory is different in each ranking, the most prolific European cinema industries are, by and large, also those with the highest number of films by women, as was to be expected.

Figure 27 Countries by number of films produced (2003 to 2012)
By number of films



Source: OBS LUMIERE

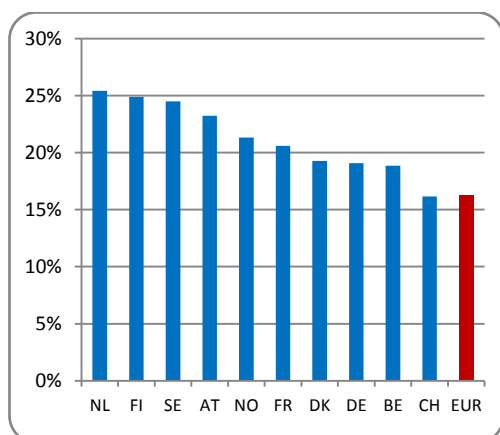
Figure 28 Countries by number of films by female directors (2003 to 2012)
By number of films



Source: OBS LUMIERE

It comes as no surprise that France, Italy, Spain, Germany and the UK were the main European producing countries during the ten-year period analysed. In turn, France, Germany, Italy, the UK and Sweden were the territories with the highest number of films by female directors. The aggregate figures of each top ten accounted for 75% of the total number of films and 76% of the total number of films by female directors, therefore, showing, first, a high territorial concentration of film production in Europe and, second, a marginally higher concentration when it comes to films directed by women.

Figure 29 Countries by share of films by female directors (2003 to 2012)
As a percentage



Source: OBS LUMIERE

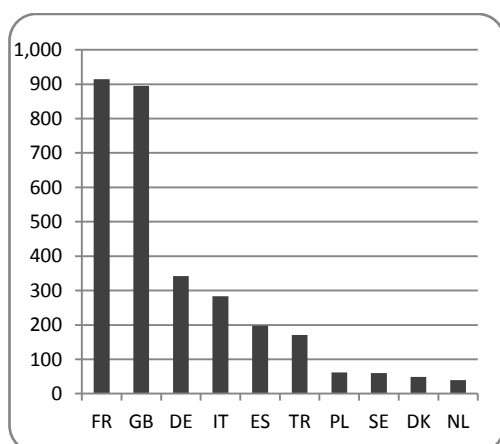
The situation in relative terms is quite different (see Figure 29), with only 5 of the top 10 European players in terms of numbers of films gaining a place in this ranking. Even so, these 5 countries moved significantly down the list, with the Netherlands, Finland and Sweden topping the rankings.

In addition, only 11 of the 19 countries forming part of the study sample for these rankings were above the European average of 16.3%. Moreover, concentration levels decreased compared to the rankings in absolute terms above (Figures 27 and 28), with the top 10 territories accounting for 67.4% of the total number of productions directed by women and slightly more than half the total number of European productions (52.8%); this is not surprising, as the top countries in this ranking are medium-size producers. In turn, larger producing countries, such as the UK, Italy, Spain and Turkey, ranked below the European average.

9.2 Admissions to films by female directors

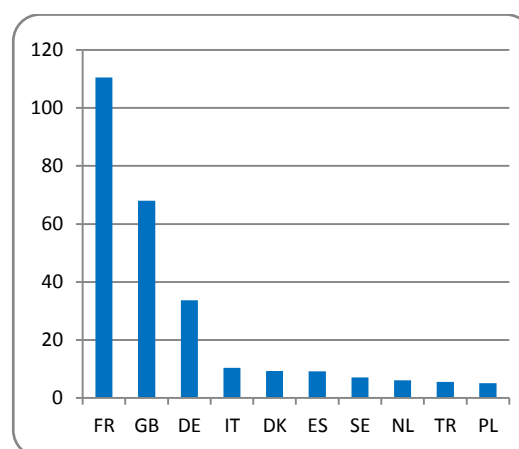
Most of what has been said about the indicators by number of films produced applies for the number of admissions by country. By and large, the main production countries are also those with a higher level of admissions to films directed by women. In this case, the concentration becomes even higher, with the top 10 territories by attendance accounting for 94.3% of the total European admissions between 2003 and 2012. The results are quite similar when we focus on attendance of films by female directors, where there is a slight decrease to a concentration of 93.3% of the market among the top 10 production countries for female-directed films.

Figure 30 Production countries by European admissions to their local productions (2003 to 2012)
Per million admissions



Source: OBS LUMIERE

Figure 31 Production countries by European admissions to local productions by female directors (2003 to 2012)
Per million admissions

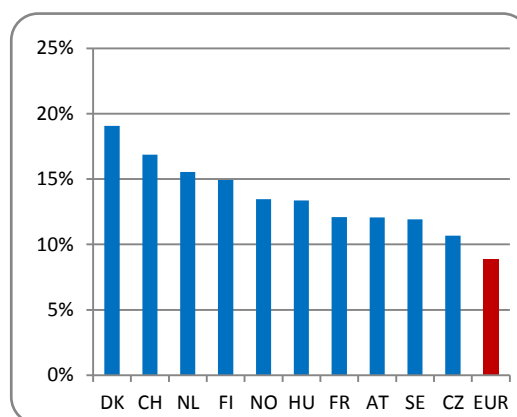


Source: OBS LUMIERE

Relative figures serve as a reality check. Denmark and Switzerland top the list of production countries by share of admissions to their female-directed films. Just 12 of the 19 countries included in the analysis were above the 8.9% European average; more importantly, France and Germany aside, the highest-grossing production countries in Europe ranked below average.

In turn, the top 10 production territories by share of admissions to films by female directors (Figure 32) represented just 37% of the total European admissions to European films shot between 2003 and 2012 and 52.24% of the admissions to films directed by women. The relative weight of these 10 territories is even more meagre than that of the top countries by share of films by female directors (Figure 29). This can be explained, on the one hand, by the fact that, except for France, the list is made up of small and medium-size production countries; and more importantly, because most high-grossing films shot by women were produced in the *big 5* countries (UK, France, Germany, Spain and Italy), which, with an aggregate share of admissions for female directed films slightly below the European average (8.8%), accounted for 81.7% of admissions to films by women.

Figure 32 Production countries by share of admissions to films by female directors



Source: OBS LUMIERE

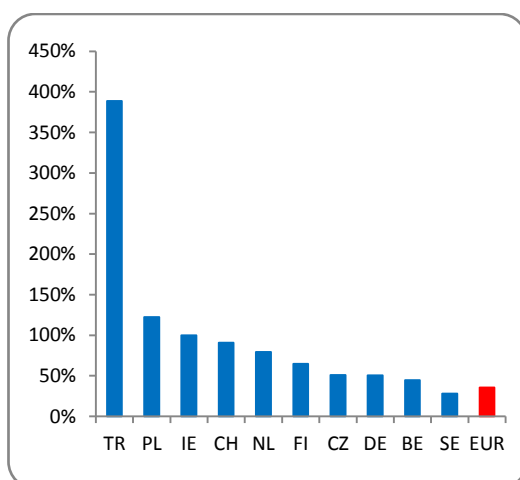
10 Growth

None of the indicators analysed so far in this section allows us to know whether the situation in any given country over the period of study is the result of a better starting point vis-à-vis other territories or due to the growth of any of our two main indicators, and if so, to what extent and whether this is in line with the general trend or specific to films by women. The analysis of these factors and a comparison by gender of the director and country of origin will therefore allow us to draw some further conclusions. In this section of the study, growth has been measured on a 5-year on 5-year basis during the period 2003 to 2012, that is to say, by contrasting the results for the period 2003 to 2007 with those for the period 2008 to 2012.

10.1 Percentage growth

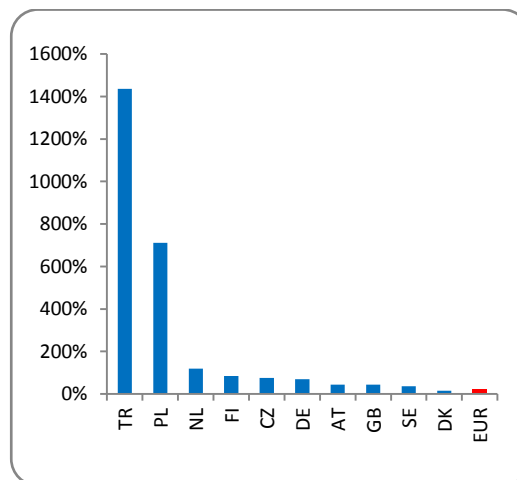
If we look at the ranking of production countries by growth in terms of the number of films and admissions to films by female directors we get a first impression of which countries have advanced the most in this regard, with Turkey and Poland topping both lists. These territories are developing production countries and expanding exhibition markets at the same time, particularly in the case of Turkey; therefore it is not surprising that there is also an upward trend in the number of films and admissions to films by women.

Figure 33 Production countries by growth of films by female directors
2003 to 2012, 5-year on 5-year



Source: OBS LUMIERE

Figure 34 Production countries by growth of admissions to their films by female directors
2003 to 2012, 5-year on 5-year



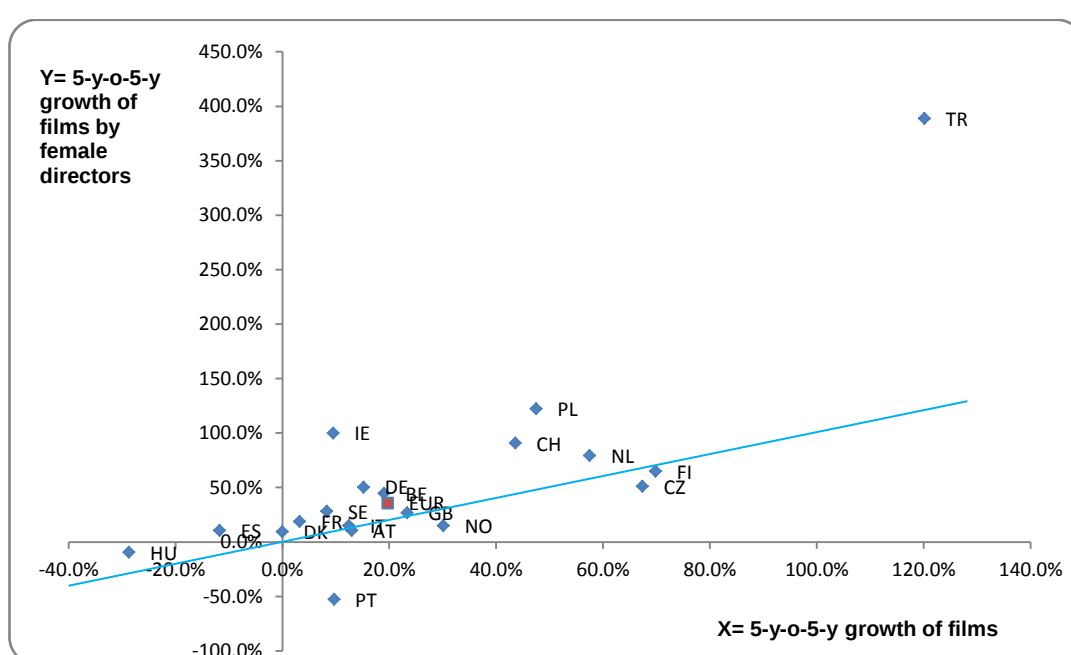
Source: OBS LUMIERE

Nevertheless, the top ten territories by growth of the number of films by female directors represent just 35.1% of the total number of European productions – 38.5% when it comes to the films by female directors. Conversely, a higher concentration can be observed in the top 10 territories by growth of admissions to films by women, accounting for 52.9% of the European admissions to European films produced between 2003 and 2012 and 50.6% of admissions to films by female directors. Once again, this can be explained by the fact that, Turkey aside, the countries topping the list were small and medium-size production countries. Besides, the growth of admissions to films by women for some high-grossing production countries (UK, France, Italy and Spain) was below the European average, with the last-mentioned three countries even showing a downward trend.

10.2 Shifts in the status quo

At this point, it is worth asking to what extent the growth of female-directed films in any particular country is simply part of a general trend and whether these films are over or underperforming compared to those by their male counterparts. In order to ascertain this we will look first at the 5-year on 5-year growth for all productions compared to the corresponding data for films by female directors. The following graph shows in which countries films by women increased as part of a general upswing in production volume; it also indicates the territories where films by female directors were swimming against the current. Furthermore, it informs us whether the growth (be it positive or negative) in absolute terms involved a change in the gender balance by number of films produced.

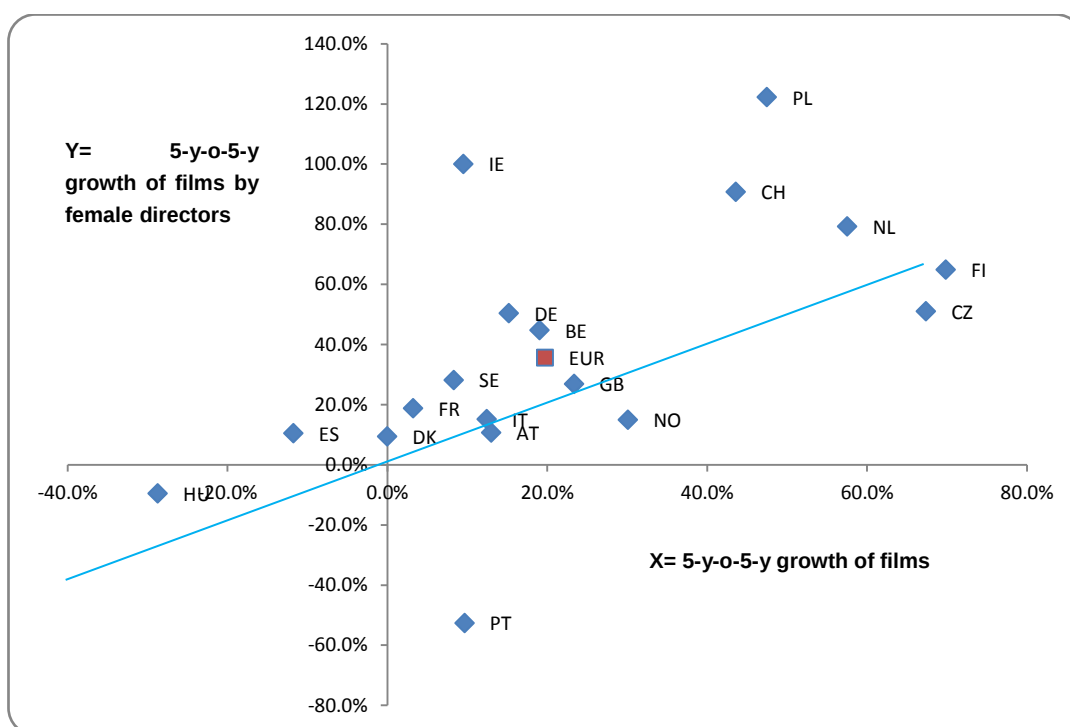
Figure 35 Growth of films compared to growth of films by female directors by country of origin (2003 to 2012)
5-year on 5-year



Source: OBS LUMIERE

A clearer view of the situation around the European average is obtained by eliminating the outlier Turkey from the graph.

Figure 36 Growth of films compared to growth of films by female directors (excluding Turkey) by country of origin (2003 to 2012)
5-year on 5-year

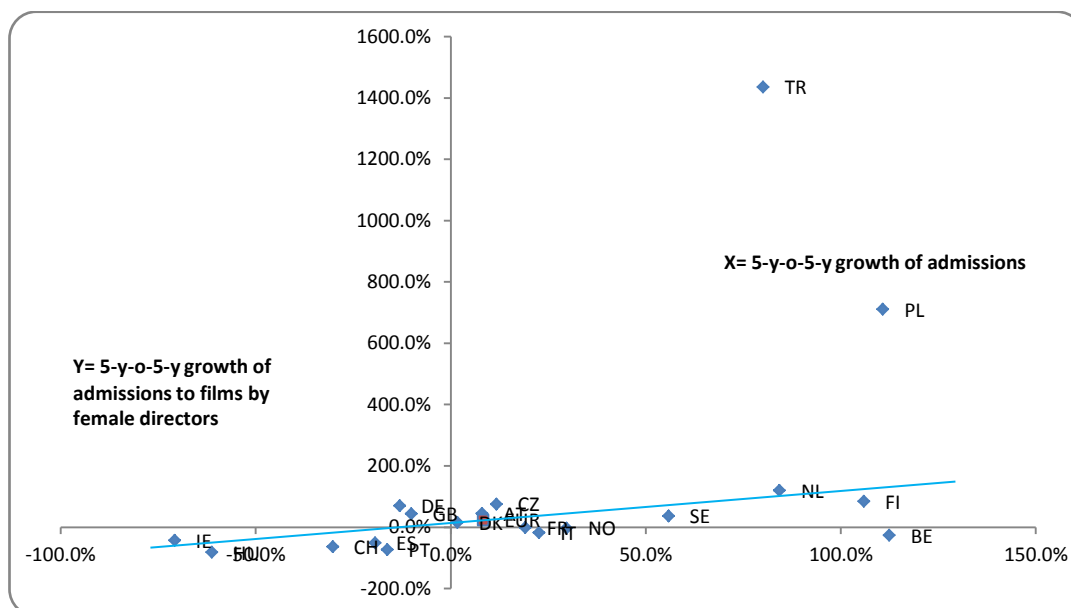


Source: OBS LUMIERE

Films by female directors increased in 17 of the 19 production countries; in most of them (15) there was a rise in both the number of films and the number of films by female directors from the period 2003-2007 to the period 2008-2012 (these countries appear in the upper right-hand quadrant of Figure 36). More importantly, growth was more acute in films directed by women in 14 countries - only in Austria, the Czech Republic, Finland, Norway and Portugal (the countries appearing below the blue line in Figure 36) was the growth of films by women below the corresponding national average for all films, meaning that these countries saw a shift of the share of films toward male-directed productions. However, in 3 of the abovementioned 14 countries, the shift towards female directors was the result of a decline in the total production volume and in one of them (Hungary), this occurred despite the decline in the number of films by female directors. The average European overall growth was 19.7%; the figure was 35.7% for films by female directors.

The same exercise can be conducted looking at admissions. 10 countries saw a rise in admissions to films by women, with 8 of them also recording an increase in total admissions (the countries in the upper right-hand quadrant of Figure 37). In turn, both indicators decreased in 5 production countries (those in the bottom left quadrant in Figure 37), while 4 saw a downward trend in admissions to films by women while there was an increase in the number of admissions as a whole. More importantly, admissions to films by female directors grew at a rate below the total average in 10 territories (those below the blue line in Figure 37). Hence, a shift of the share of admissions towards female-directed films took place in the 9 remaining countries forming part of the territorial analysis; however, only 6 of them (those in the upper right-hand quadrant between the Y-axis and the blue line) experienced this shift amid an increase in production volume of films by both male and female directors. The average European overall growth was 8.3%, as against 23.6% for films by female directors.

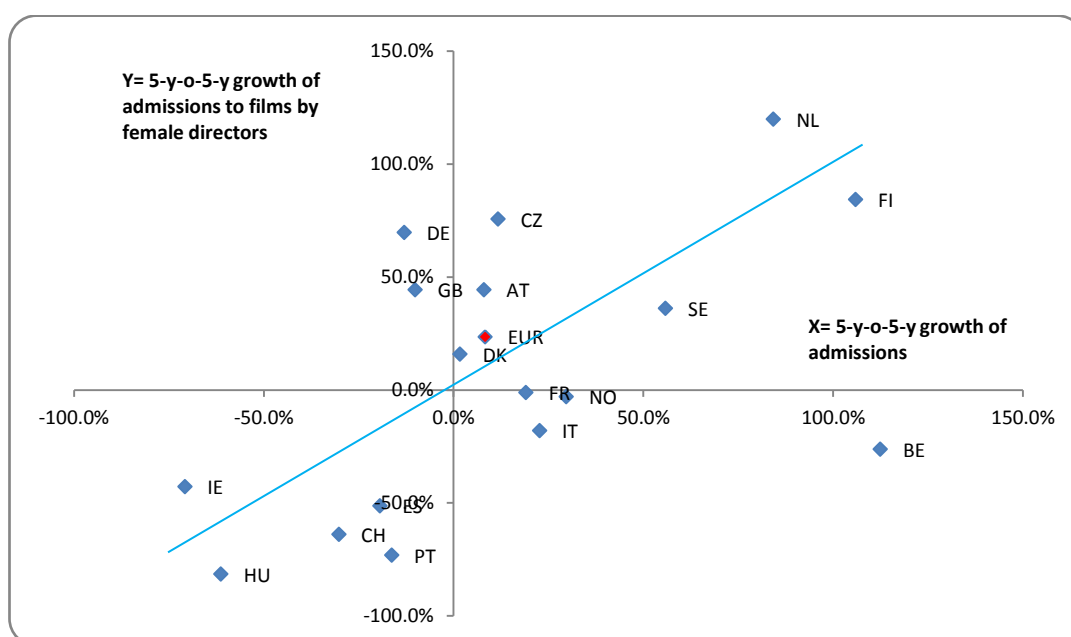
Figure 37 Growth of admissions compared to growth of admissions to films by female directors by country of origin (2003 to 2012)
5-year on 5-year



Source: OBS LUMIERE

The next graph offers a closer view of the comparison between growth of total admissions and growth of admissions to films by female directors presented in figure 37, focusing on values around the European averages for both indicators, therefore eliminating the two outliers among the countries studied, namely Turkey and Poland.

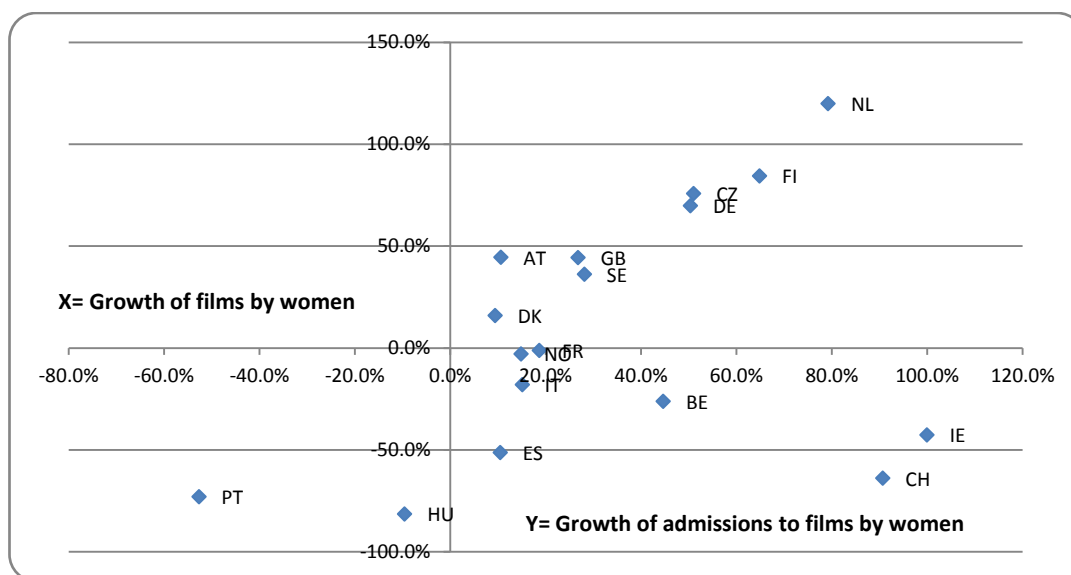
Figure 38 Growth of admissions compared to growth of admissions to films by female directors (excluding Turkey and Poland) (2003 to 2012)
5-year on 5-year, by country of origin



Source: OBS LUMIERE

Finally, by comparing the results of growth by production volume and by admissions to films by women, we find that ten production countries achieved positive growth for both indicators. Moreover, seven European territories recorded a growth in the number of films by female directors while admissions to this type of production decreased. Two production countries experienced negative results for both indicators, leaving no territory with an increase in admissions to films by women despite a decrease of the number of such films.

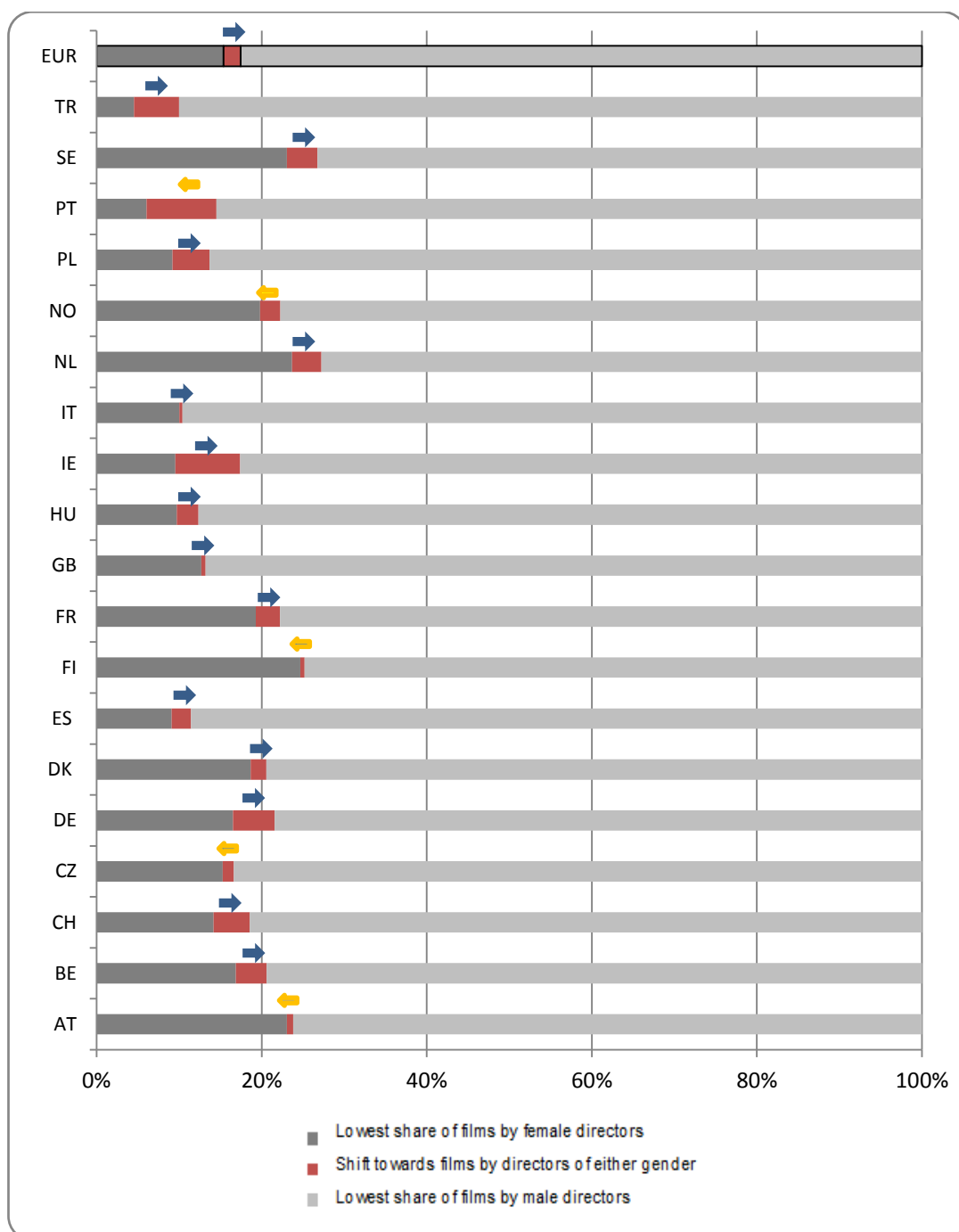
Figure 39 Growth of films compared to growth of admissions to films by female directors by country of origin (excluding Turkey and Poland), (2003 to 2012)
5-year on 5-year



Source: OBS LUMIERE

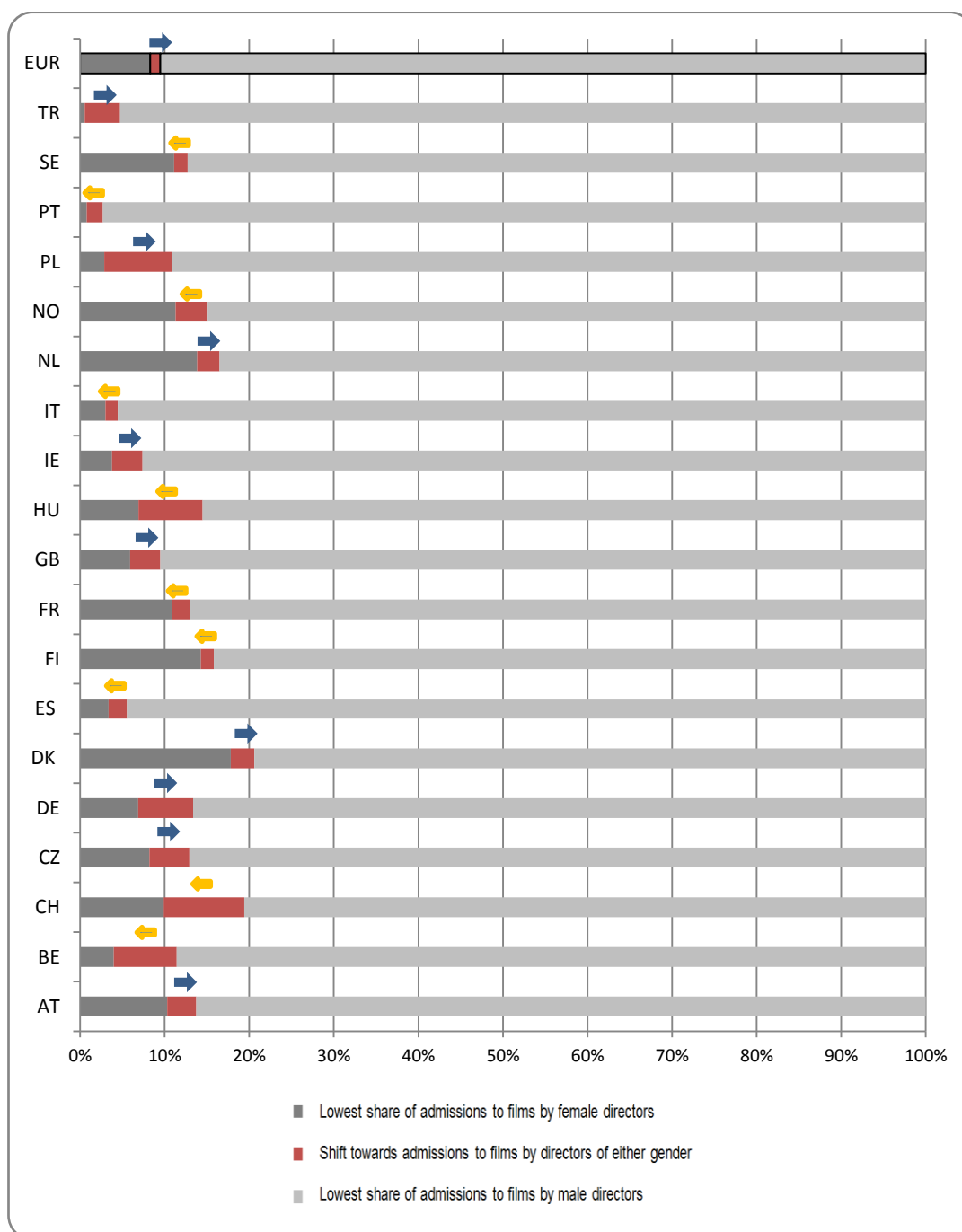
Although this was true in most cases, growth in absolute terms did not necessarily change the gender balance, as this is also linked to the growth of films by male directors for the corresponding indicator. Figures 40 and 41 illustrate the actual shift between genders from the period 2003-2007 to 2008-2012 for each of our two main indicators.

Figure 40 Shift of the share of films by gender of the director in each territory (2003 to 2012)
From 2003-2007 to 2008-2012



Source: OBS LUMIERE

Figure 41 Shift of the share of admissions by gender of the director in each territory
From 2003-2007 to 2008-2012

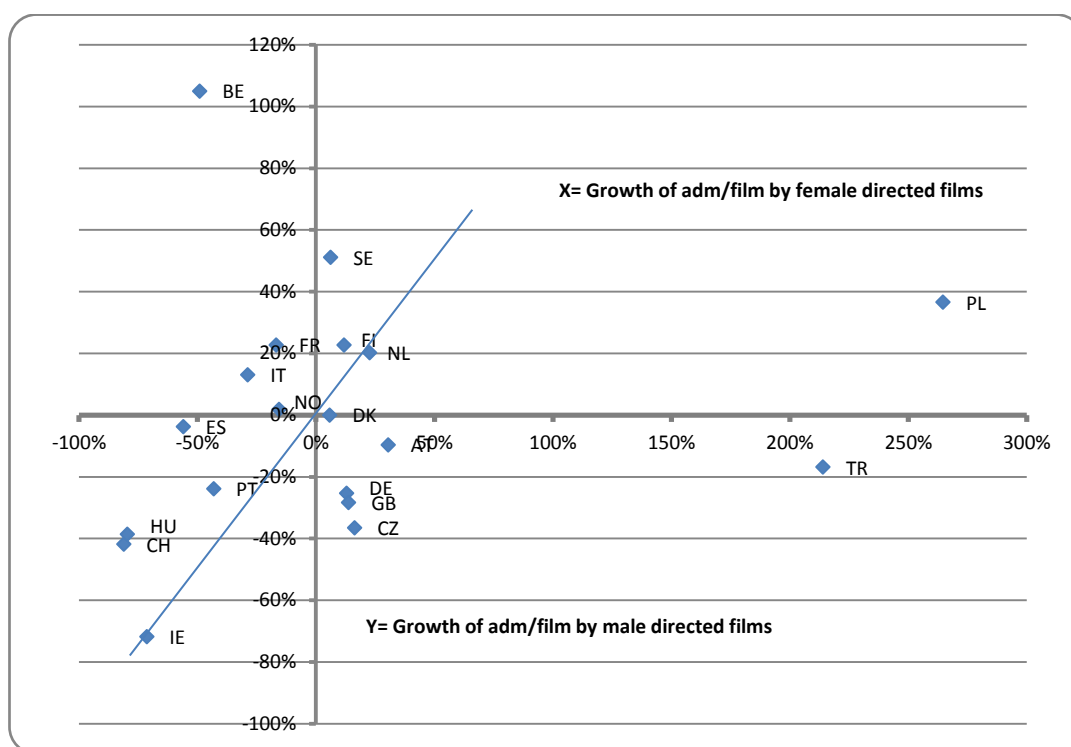


Source: OBS LUMIERE

10.3 Performance and gender

The term performance is used here as the number of admissions per film by directors of either gender. The evolution of its average over time and the changes in the balance between male and female directors completes the picture of the results provided so far.

Figure 42 Evolution of performance by gender of the director (from 2003 to 2007 to 2008 to 2012)
As a percentage



Source: OBS LUMIERE

Figure 42 gives an idea of the relationship between growth by number of films and growth by admissions for directors of the same gender. Furthermore, it allows us to compare the proportions of these types of growth for films by directors of each gender. The countries below the blue line are those where the percentage growth of average admissions per film was greater for films by female directors than for films by male directors, and therefore where the relative weight in terms of performance improved for female directors.

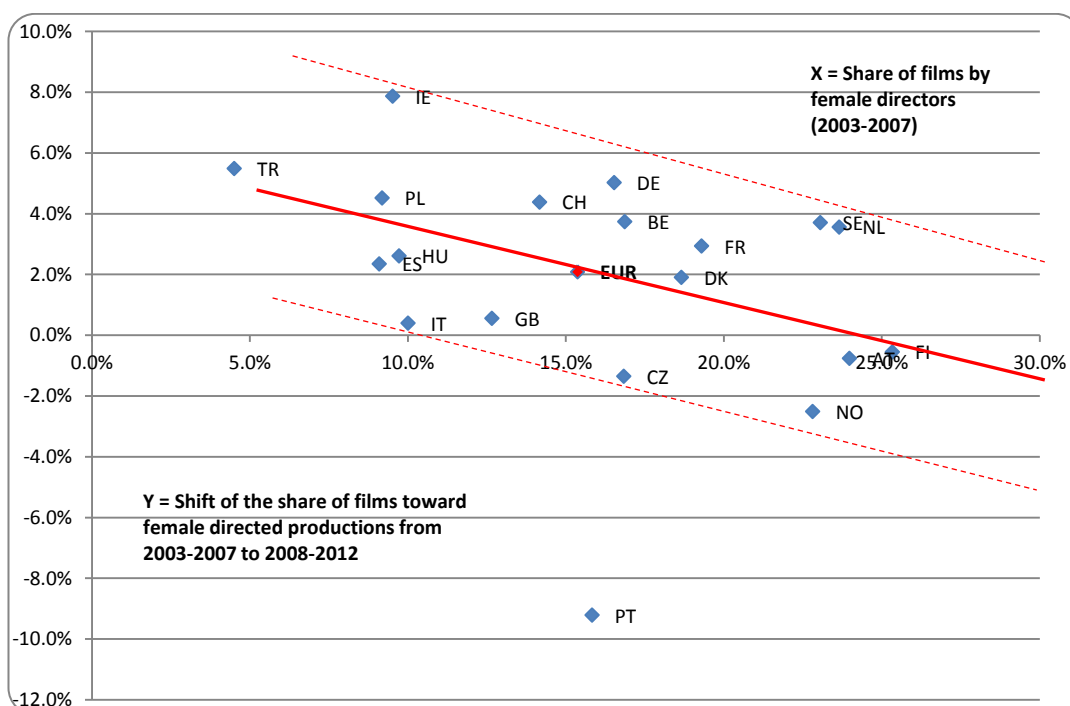
At European level, the performance of films by women decreased (slightly) more (by 8.9%) than the performance of films by men (by 8.5%), very close to the break-even point (at which average admissions to films by directors of either gender would have changed by the same proportion). This meant a marginal shift of the status quo in terms of performance, with average admissions to films by women going from 49.8% to 49.5% of the average admissions to films by male directors.

10.4 The starting point

There is only one element missing for a full understanding of the growth of either of our two indicators - the starting point. If the other factors remain unchanged, the higher the share of films by female directors at the outset, the higher the increase in absolute terms of the number of female-directed films will need to be to trigger the same percentage shift of the status quo towards women. In other words, other variables remaining constant, the production volume of female-directed films will need to increase more in absolute terms for the share of these films to increase from 15% to 16% than for it to go from 5% to 6%; therefore it is not surprising that the highest shifts toward female-directed films occurred in countries with a low share of such productions. In fact, four of the five countries where the gender balance by production volume shifted towards women by more than four percentage points were below the European average share of films by women during the initial period covered by this study (2003 to 2007). Conversely, all five countries where the balance shifted towards male-directed films were above the European average share of films by women.

Growth in Europe appears to fit these assumptions, as most production countries (all of them except Portugal) followed a similar pattern, represented by the red line in Figure 43, within the margins drawn by the broken lines either way). This means that the shift of the share of films towards female-directed productions in European countries is heavily influenced by the share of films by women at the outset, within some margins which may be due to different film support policies (as well as possible changes from one period to the other) and differences in the perception and/or marketing of female-directed films from country to country, among other factors.

Figure 43 Share of films by female directors (2003-2007) v. shift of the share of films towards female-directed productions (2008-2012)

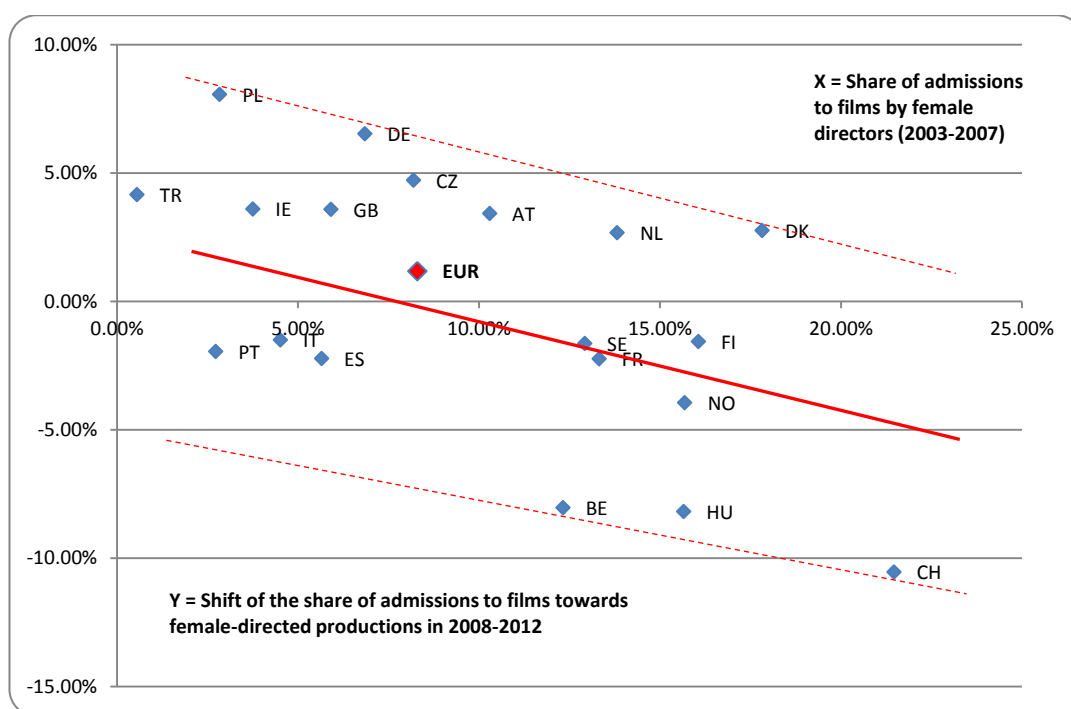


Source: OBS LUMIERE

Similar conclusions can be reached from the comparison by admissions (see Figure 44). As with the share of number of films, the lower the share of admissions to films by female directors was at the outset, the greater and more frequent the shift of the indicator towards female-directed productions. However, in this case, shifts of the share of admissions towards films by male directors also occurred

(although only to a fairly small extent) in countries with a low share of admissions to films by women; as a matter of fact, most countries (ten) experienced such a shift, compared to only five in the case of the previous indicator. In addition, the bracket within which we find most of the results is much wider. This can be explained by the fact that fluctuations in the number of productions are usually smaller than for the number of admissions; attendance figures are heavily affected by outlying blockbusters, and therefore, sharper shifts in the share of admissions are more common than in relation to the share of productions, making the range of results much more heterogeneous as far as admissions are concerned.

Figure 44 Share of admissions to films by female directors (2003-2007) v. shift of the share of admissions towards female-directed productions (2008-2012)



Source: OBS

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