THINK TANK...
ON EUROPEAN FILM AND FILM POLICY

IB BONDEBJERG & EVA NOVRUP REDVALL 2010

A SMALL REGION IN A GLOBAL WORLD

PATTERNS IN SCANDINAVIAN FILM AND TV CULTURE

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EXCERPTS OF REPORT

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This report is commissioned by the European Think Tank on Film and Film Policy under the leadership of Henning Camre in preparation for the Scandinavian Think Tank. The two main responsible authors of the report are professor Ib Bondebjerg and scientific research assistant, PhD Eva Novrup Redvall, both from the Section of Film and Media Studies, University of Copenhagen. Ib Bondebjerg's primary focus has been the film analysis, whereas Eva Novrup Redvall has primarily been responsible for the television analysis.

Scandinavian partners and co-authors

A report of this magnitude could not have been written by only two people. Professor Ove Solum, University of Oslo, and his research assistant Lene V. Hansen have both contributed analytical material on Norwegian film culture and empirical data, just as professor Erik Hedling, associate professor Oluf Hedling and PhD Lars Diurlin, all from the University of Lund, have contributed analyses of Swedish film culture as well as empirical data. All of the above mentioned contributors have also co-authored parts of the national sections of this report.

Other key sources and extended thanks

The empirical data behind the comparative analysis consists of data from already existing sources: the national film institutes DFI, NFI and SFI (where several people provided invaluable help), the European database Lumiere as well as the TV data on film and TV drama that can be found in the media research sections of the national television stations DR, NRK and SVT. Obtaining TV data has proved to be one of the hardest jobs during the creation of this report, but Niels Marslev from DR's Media Research Department as well as the research assistant Jonas Secher Borgen both provided crucial help when it came to finding the appropriate material from Denmark, Sweden and Norway. As a consequence, this report is therefore able to present a much broader picture than has previously been possible of the Scandinavian film culture and its real audiences, not just in the cinemas, but also on television. We would have liked to expand the empirical data on Scandinavian cinema to include the digital universe of DVD and VOD, but the empirical data is almost impossible to get down to an individual film title level, although the European Film Think Tank did provide us with selected DVD data the last two years.

Interviewees

We would like to extend special thanks to Niels Marslev for not only assisting us with obtaining the required television data, but also for his useful comparative report on Scandinavian television drama and general helpful input along the way. The chapter on Scandinavian TV drama relies in part on Niels Marslev's report (Marslev 2010), but further to this we have also interviewed and/or received feedback from the following key Scandinavian TV drama players: Stefan Baron (Head of Drama, SVT Stockholm), Gunnar Calsson (Executive Producer, SVT), Christian Wikander (Head of Drama and Entertainment, SVT Göteborg), Hans Rossiné (Head of Drama, NRK), Ditte Christiansen (Producer, DR), Sven Clausen (Producer, DR), Ingolf Gabold (Head of Drama, DR), Steen Salomonsen (Head of Acquisition, DR) and Henrik Hartmann (Secretary General of Nordvision). We would like to thank them all for taking time out of their busy schedules to share their knowledge and opinions.

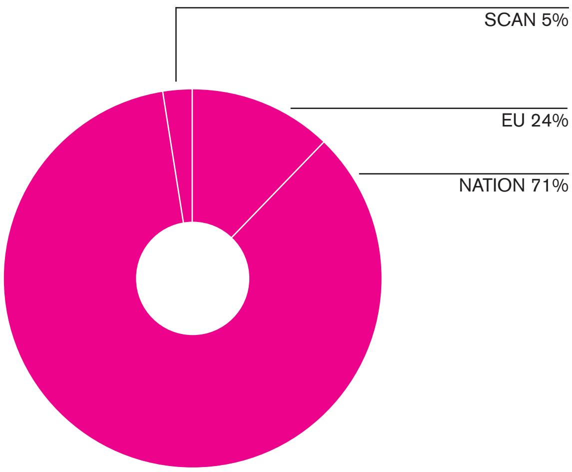
Copenhagen, November 29, 2010
Ib Bondebjerg & Eva Novrup Redvall

FILMS IN A NEW CONTEXT: SUMMARY AND MAIN CONCLUSIONS

In this report we have analysed the Scandinavian film and television culture focusing on films released between 2002-2006, using data drawn from both cinemas in Scandinavia and in the rest of Europe, as well as films shown on television in Denmark, Norway and Sweden. The study involves a comparative look at the support mechanisms and the production sector as well as the distribution sector, especially co-productions, but the main focus is on film genres and TV drama, audiences and the Scandinavian and European distribution of films.

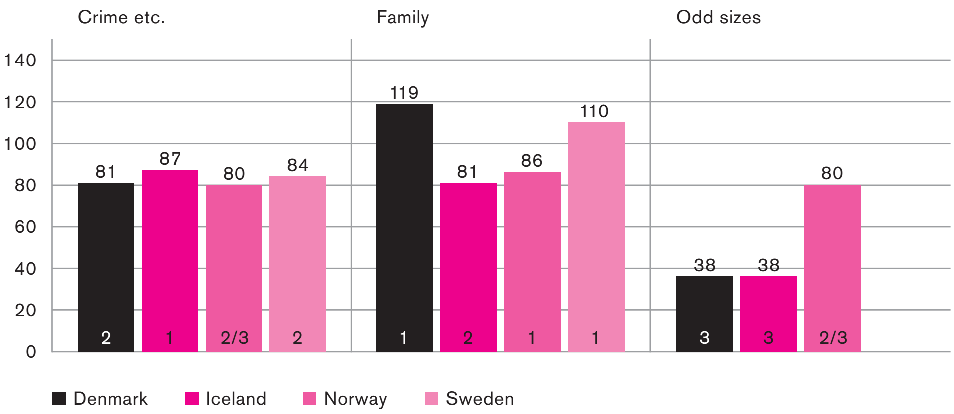
One of the main conclusions of the report is that whereas there continues to exist a successful Scandinavian tradition of co-production and co-distribution between the Nordic public service TV stations, with loyal audiences watching TV dramas from their neighbouring Scandinavian countries, this is not the case when it comes to film. Even though a Scandinavian film culture does exist and consists of a rather unique transnational framework for cooperation – at least seen from a European perspective, where no such regional cooperation exists – the result with regards to the exchange of films and film audiences is disappointing. The report shows that if one adds the total cinema admissions for films from Denmark, Norway and Sweden between 2002-2006 and divide them into the three categories *National* (Danish, Norwegian and Swedish films on their own national market), *Scandinavian* (Danish, Norwegian and Swedish films on the other Scandinavian markets) and *EU* (the three countries' admissions in the rest of EU36) the figures are as follows: 71%, 5% and 24% (fig. 22). The conclusion is thus that on average the non-national Scandinavian market is of least importance, the EU market is almost five times bigger, whereas the national market is the most important.

Figure 22 Regional shares for Scandinavian films 2002-2006 based on TV figures for Norway, Denmark and Sweden.2008).



We cannot conclude from these data that Scandinavians do not want to watch films from neighbouring countries. Examples of Scandinavian films that successfully break borders do exist, one example being the *Millenium trilogy*. Moreover, the figures for Scandinavian TV drama are much more impressive when it comes to the non-national, Scandinavian shares (see fig. 45). However, the numbers suggest that there is no natural cultural Scandinavian feeling of togetherness, which might automatically make us want to watch a film or a TV drama just because it is Scandinavian. Instead, we primarily watch films and TV drama because of their genre, quality and content, and as the numbers show it is the crime and drama genres that travel best.

Figure 45 **Indexed share of audience for main drama genres, foreign series. Source: Nordic Television Audience Measurement/Nordic Public Service Broadcaster Research Departments (Marslev 2010: 30).**



The question, of course, is why do the co-productions in TV drama function so well and what is missing in the film culture to improve the Scandinavian co-production and co-distribution? First of all one could point to the fact that the Nordvision cooperation dates more than fifty years back and the network between people from the Nordic public service stations seems much more firmly established than the co-production structures in the film culture – despite the important role of Nordic Film and TV Fund. The public service stations seem to have established not just a close collaborative network, but also a set of creative formulas that combine international and national genre concepts. The international and national success underlines this, but it seems that the Scandinavian TV stations have also worked intensely with the relationship between narrative, genre and audience knowledge. However, it must be noted that even within a Scandinavian TV drama collaboration context it is mostly crime and drama series that travel, not experimental dramatic productions.

The cooperation in the Scandinavian film culture seems much less developed and lacking the same kind of collective directions and goals, again despite the role of NFTVF. The number of co-productions inside Scandinavia is moderately impressive, with a total of 124 films between 2002-2006 with some Scandinavian co-productions (see fig. 18). Nevertheless, the number of co-produced films achieving a significant audience on the non-national Scandinavian market is negligible. There is furthermore absolutely no empirically statistically significant correlation between co-production and co-distribution in co-production partner-countries. Many co-produced films reach a much smaller cinema audience than Scandinavian films that are not co-produced, and many of the Scandinavian co-productions do much better in non-co-producing countries. Co-production is no doubt important for the creation of creative, transnational networks, but it is clearly not a decisive factor for a film's success in the rest of Scandinavia.

Figure 18 Co-productions in Scandinavia 2002-2006, by country/region

Country	DK	NO	SE	Rest-Scan	EU	US/CA	Other	Total
DK-films	-	11	21	4	36	4	1	77
NO-Films	6	-	12	1	4	2	0	25
SE-films	34	15	-	20	20	1	1	91
Total	**40**	**26**	**33**	**25**	**60**	**7**	**2**	**193**

Note: Figures reflect the number of times a country is involved in a given co-production, the actual number of co-productions in Scandinavia is lower than 193. If a film has more than one co-production country, each country is calculated.

The data we present clearly indicates a Scandinavian film culture that remains too focused on production, on getting the films funded and into production, but with not enough focus on reaching a transnational audience outside the national territory.

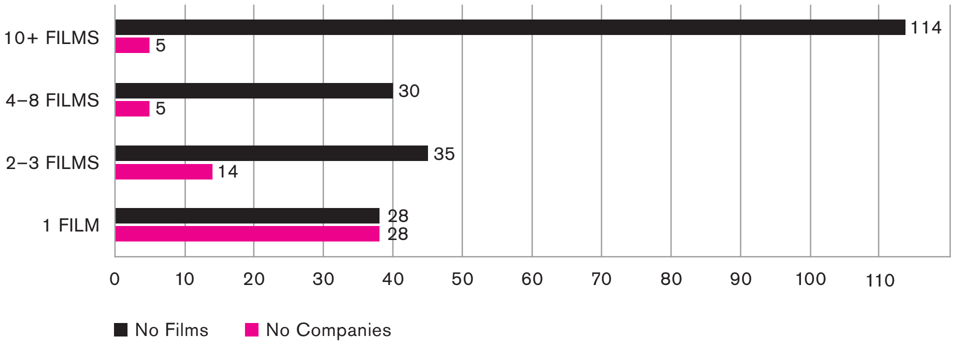
Data released by the Nordic Council, following a recent survey, revealed that around 60% of the Nordic citizens feel a special connection to the Nordic region and even supported a federal Nordic union. This fact cannot be seen in patterns of film consumption in Scandinavia. Scandinavia doesn't appear to be a culturally homogenised region where people watch Scandinavian films because they are Scandinavian: most of the films that achieve (even moderate) success in another Scandinavian country must attribute this to the director, the cast or the genre and story.

As already indicated the data on film consumption clearly shows that the national market is still the most important and that for many films the European market plays a much bigger role than the rest of Scandinavia. However, there is no reason to believe a stronger inter-Scandinavian exchange could not succeed provided appropriate strategies were developed as shown by the example of Scandinavian television drama. Joint initiatives like the 'Toronto High Five' in 2009 and 2010 could further this, but in general it is difficult to find explicit Scandinavian strategies that combine national, regional and international elements outside of the Nordic Film & TV Fund. The Nordic Film Institutes and the Scandinavian distributors do not seem to have developed any efficient coordinated strategies.

One difference between the film and TV industry in Scandinavia is that the film sector appears to be much more fragmented. The Scandinavian production sector is weak and fragmented and on the whole very national and inward looking. In Norway, Sweden and Denmark large and robust companies are rare, and transnational developments of national companies like Zentropa in Denmark are hard to find. Co-production therefore happens between small or very small companies, and as the data from

Denmark, Norway and Sweden shows, many companies in Scandinavia on average make less than one film a year. In Denmark only five companies have made more than ten films between 2000-2010 and only five companies between 4-8 films (see fig. 13). A similar weak and fragmented structure with variations can be found in Norway and Sweden. Diversity is a good thing, but a diversity of this kind challenges the emergence of strong creative clusters with the strength and continuity of productions to succeed transnationally.

Figure 13 **Number of production companies in Denmark 2002-2010 and number of films produced. 52 companies have produced 214 films.**



The distribution sector in Scandinavia is much more centralised, but here the problem might be that there is no common Scandinavian strategy and that more diversity needs to be supported, allowing for more independents distributors. We have not done any in depth study of the Scandinavian distribution sector, but it seems highly relevant to discuss this dimension further, while taking into account the new digital forms of distribution now moving to the centre of the modern film culture

Another factor of significant importance to Scandinavian film and one that deserves closer analysis is the film festivals. As indicated in this report the festival system has grown in importance in all three Scandinavian countries, and it now has a stronger international profile and a clearly more diverse genre profile. Studies of the role of festivals for the international exchange and sale of films based on festival participation and performance clearly shows an effect.

In this report we have analysed the main genres in Scandinavian cinema: drama, comedies, films for young and children (CY-film, including animation) and other genres like crime, thriller, horror, action and adventure. We have furthermore analysed the audience profile of these genres, especially in relation to age and life style segments, based on TV data of Scandinavian films seen in Denmark. The films that manage the transition from the national market to a broader Scandinavian market are almost all dramas, with the occasional comedy exception. Animation films in some cases have achieved huge success in Scandinavia and Europe, whereas films for children and young people do not enjoy nearly the same kind of success outside there own national market. It is in fact possible to illustrate that if we compare the success of drama on its national market, the success on the Scandinavian market is much stronger and drama can thus be said to fare better on the non-national Scandinavian market than the national. This means that other types of films are not exported and do not achieve nearly the same kind of success.

The data highlights how some of the family comedies that are often extremely popular nationally are not travelling to the rest of Scandinavia to any significant degree. They are home made products for a traditional, national audience, and if they travel, it is as remakes, one example being the series of Danish *Olsen Banden* films. A closer look at the kind of films that do achieve a wide circulation, not just in Scandinavia, but also in Europe (even though they do not always have a strong *quantitative* presence) points towards the more art cinema oriented dramas. In generic terms the films by e.g. Lars von Trier and Bent Hamer are part of the drama category, but they belong to the experimental art cinema tradition, and in fact have an international profile and status that must be seen as a vital part of the cultural and aesthetic diversity of Scandinavian cinema.

An important conclusion to draw when studying the state of the Scandinavian film culture today is that there is a serious problem with attracting the young generation and the modern life style segments, especially the modern individual life style segment. A young person belonging to the modern, individual life style segment typically prefers American genre films, films that our analysis shows are not strongly represented within Scandinavian film culture. We do not produce many films that can compete with the American genre films, even though the generation of directors after 1995 have moved in that direction, and despite the Swedish film culture faring better in this regard than Denmark and Norway. TV drama has also contributed to a renewal in terms of the genre, with a number of drama series based on crime-thriller formats and drawing on storytelling strategies often linked with the American cinema. However, Scandinavia seems to be currently losing the fight for the young cinema audience and in the new digital media culture. The genre profile for the typical film user and the audience attributed to the average Scandinavian film success thus consist of the slightly older and more traditional segments, rather than the young, modern segments.

The report points to the fact that Scandinavian film culture, like the film culture in a large part of the Western world, is no longer merely based on the cinema experience. The cinema plays an important role in a film's life, but the audience for films are now also to be found on many other platforms: television, VOD, DVD on TV and computer, downloads, mobile media etc. The Scandinavian film culture needs to adapt to this and develop active strategies instead of traditional defensive strategies. The hold back periods for films must be reduced and made flexible: some films could premiere on several platforms at once: cinema, VOD or DVD, others might enjoy an extended cinema release, before reaching other platforms. In this respect, targeting young audiences will be crucial, because younger audiences will be the first to develop new habits and take up new technologies.

Television, both digital cable and web-based TV, will remain an important part of the new film culture already in place: the figures reported here show that between 2002-2006 in Denmark alone, the total figures for cinema admissions were only 16 million whereas television represented 39.9 million. In fact, while the total admissions for Scandinavian cinema films in all three countries in this period were 43.8 million, the number of viewers for all films on Scandinavian television was 125 million (se fig. 19).

Figure 19 **Total admissions for Scandinavian films 2002-2006, cinema and television data, films on own market and on the other three markets and EU36.**

	SE-CIN	SE-TV	DK-CIN	DK-TV	NO-CIN	NO-TV	EU 36 -CIN	Total
DK-films	680.982	4.815.000	16.029.534	39.869.000	470.750	4.904.000	7.058.067	73.827.333
SE-Films	16.741.043	45.190.000	449.190	2.598.000	1.027.570	7.759.000	4.349.805	78.114.608
NO-films	67.843	1.450.000	369.046	1.022.000	7.979.093	17.346.000	2.185.264	30.419.246
Total	**17.489.868**	**51.455.000**	**16.847.770**	**43.489.000**	**9.477.413**	**30.009.000**	**13.593.136**	**182.361.187**

The Number of films included in the SVT, NFI and DFI data on films 2002-2006 (SE the total number of cinema admissions for all Scandinavian films in this period is 16.9 milllion, but on Danish television almost 40 million viewers found their way to a Danish film, and in Sweden the ratio between cinema and television was even stronger in favour of television. This underlines the fact that we already live in a new film culture, where other platforms than cinema are extremely important. The problem of course is, that economically the enormous film viewing is not really reflected in the economy: it is not that easy to determine how films on television contribute to the total film economy.

In economic terms the picture is in reality much more blurred, because the role of cinema in a film's economy is rather different from the economy of television. However, the report indicates that based on audience figures television is by far the largest window for Scandinavian films. This fact is clearly not visible in the way data on a film's performance is reported in the statistics of the national film institutes, but it should be taken into account when the cultural and economic impact of film production is measured and discussed.

One of the main conclusions of the report, especially brought forth in the last chapter, is the fact that we need to develop a much broader understanding of what Scandinavian film culture is and of the role of this cinema in a global context and in relation to the new digital film and media culture already present and very much alive. *The Cinema is no longer the key element in a film's life*. This sends a message to those making and distributing the films, to the national film institutes and to the cultural politicians in Scandinavia: when documenting a film's life in the future neither cinema data nor national data will do. We need systematic documentation of films in national cinemas and in European cinemas, we need systematic documentation of films on national and European television and we need systematic data on the individual films' digital life (DVD, blu-ray, sale, rental, VOD etc.). If we want to focus especially on the Scandinavian dimension, the data must be specified to this region. If we want to make policy decisions and encourage international and Scandinavian cooperation we cannot presume to do so based on data and concepts very much derived from knowledge of national film culture and cinema data.

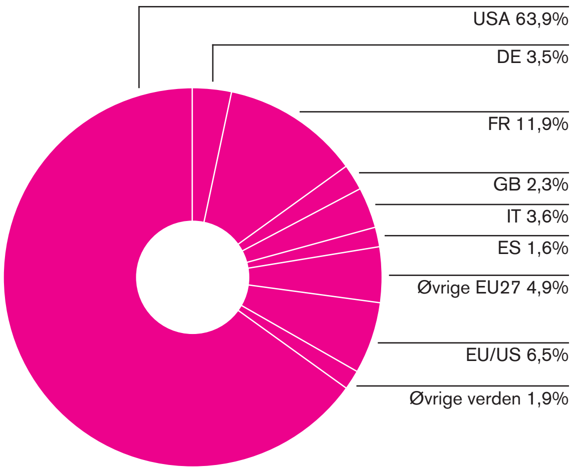
The data collected in this report clearly shows that the profile of Scandinavian cinema is dramatically different if we include the television data, and had it been possible to include systematic data on the digital dimension an even more radical picture would have emerged than the usual one focusing primarily on cinema.

We can no longer lock ourselves in the national cinema box. A global, digital revolution has already taken place. The audience knows it and acts accordingly. The national film cultures need to get moving and to find new ways of taking both traditional and new platforms into consideration in a national, regional and global perspective – *the future is already here*.

INTRODUCTION: SCANDINAVIAN FILM CULTURE, GLOBALISATION AND THE DIGITAL CHALLENGE

Cinema has always been both a very national and a very global form of culture. Images often travel more easily and faster across borders than literature and other cultural forms. But since 1945 the global trends in cinema have been remarkably stable in the sense that the consumption of films has been dominated by American films and by national films in most European countries, whereas the distribution and consumption of films from other European countries has been rather limited. The figures vary from country to country, but the general structural pattern is very clear. In 2008 for instance (see fig. 1), the average percentage of films in EU27 shows an American share of sold tickets of 63.9% and a total European share (both on the domestic market and in other European countries) of 27.8%.

Figure 1 **Regional shares of total European cinema market (Lumiere data 2008).**



The total cinema admissions this year were 925 million tickets, out of which the US took 591 million. In addition to the dominance by American films, 6,5% of the European films are in fact EU/American co-productions, which means that the US is involved in a further 6o million admissions. The remaining world cinema is almost invisible, accounting for less than 2% in Europe. The actual EU share of total cinema admissions this year was thus only 27.7% or a mere 256 million tickets. The EU is an insignificant player in this context and, furthermore, most of the 27.7% can be broken down to figures showing that the figure for non-national European films is down to 6-8%. The exchange of films between the European markets is not impressive, despite years of co-production and EU support for films. When we thus examine markets and audience figures it becomes clear there is no European film culture. What we have is a family of film cultures with some regional and bilateral cooperation and interaction.

Into this generally gloomy picture of a weak European film culture comes the Scandinavian film culture, perhaps dominated by a 'myth' of being a film and television culture with a strong affinity between the three countries and a tradition of collaboration. It is a 'myth' supported by the fact that we seem to have a common film policy, a common strong public service television, and an institutionalised structural tradition of collaboration through for instance the Nordic Film & TV Fund. Maybe the feeling of belonging to a Scandinavian culture can also be found in a cultural, historical and social alikeness identified as the Scandinavian welfare state. We have to ask ourselves, however, if this is a myth or a reality, and whether or not it is reflected in the way we produce film and television and the modes of distribution of film and television between the Scandinavian countries?

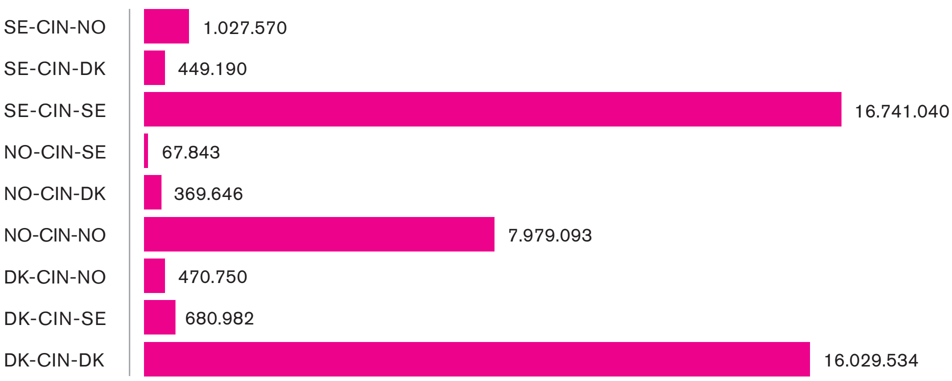
There is no doubt that sales to foreign markets, including the Scandinavian, European and the rest of the world is important for a number of films from the Scandinavian countries and that the Scandinavian *auteur* tradition – dating back to world cinema icons like Carl Th. Dreyer and Ingmar Bergman – has contemporary equivalents in e.g. Lars von Trier, Bent Hamer and Lukas Moodysson. A few of the Scandinavian auteurs do in fact have a transnational audience, but the large proportion of Scandinavian films is rarely able to travel, neither in Scandinavia nor in Europe as such.

In a report for The Danish Film institute (DFI 2010), the Danish and Swedish share of films distributed in the European market is estimated to be 8% (4% per country), however, the share of ticket sales is only 2% (1% for each). The biggest shares go to France and the UK. If we examine how much sales abroad contribute to a film's total sale, however, both Denmark and Sweden figure with quite high percentages: between 2003-2008, 30% of all tickets sold for Danish films and 23% of all Swedish films were sold abroad, both in the EU and the US. In some cases (Lars von Trier's films are an example), the main sale happens abroad. Seen in a broader perspective a globalisation and Europeanisation of Scandinavian cinema can therefore be said to have taken place, even if the national market remains the dominant and most important factor for a film's success.

If we shift our focus to cinema only, how are the general trends in the Scandinavian market? In general terms, the Scandinavian countries are very similar to European countries when it comes to the division of audience shares: national films account for around 20%, American films around 65% with the remainder attributed to the rest of the world, with Europe accounting for around 7-8%. Another perspective becomes clear if we look at how the entire European cinema market is divided (se fig. 1). The big five (France, Germany, Italy, UK and Spain) dominate what remains of the market after the Americans share. Furthermore, most of the actual share of the European countries is not taken on the European market as such, but on the national markets.

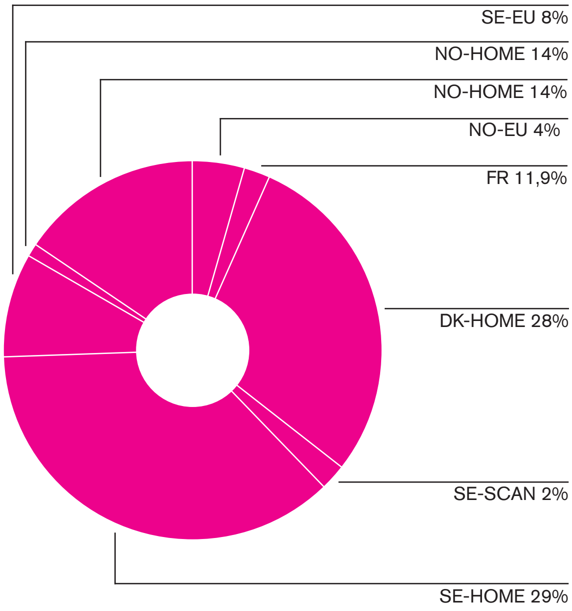
The Scandinavian patterns are just as clear: Denmark and Sweden dominate, both in terms of the number of films produced, the average audience per film and the average share of the Scandinavian market. The Scandinavian market is, however, much smaller than the national market and the European market, and all in all only 30% of Scandinavian films are distributed to the other Scandinavian countries, a figure only slightly higher than the figure for European distribution. As it is clear in fig. 2 the national, Scandinavian films are almost invisible outside of their national borders, only Swedish films in Norway (SE-CIN-NO) passes the 1 million threshold, and – as described later – only the fact that films from these countries fare much better on both national television and the television channels in other European countries creates a Scandinavian film exchange of any significance.

Figure 2 **Scandinavian films in national cinema and cinemas of Norway and Sweden, total amount of sold tickets 2002-2006**



Based on empirical data, the *cultural* argument for Scandinavian film culture, based on deep similarities between countries in the Scandinavian region, cannot be supported. At least the exchange of films between the Nordic countries doesn't indicate a *natural cultural connection.* As fig. 1 illustrates the national home market and the EU market are much more important for each of the Scandinavian countries than the Scandinavian market. On the other hand it is unlikely that culture in itself is an argument for or against transnational exchange, since American films do so well. As we shall see from the following Scandinavian television culture seems to fare much better when we examine the presence of Scandinavian television series in other Nordic countries. A clear hypothesis therefore is that the reasons for a lack of a better Scandinavian exchange have to be found in factors related to areas of production and distribution as well as to film genres.

Figure 3 **Cinema admissions in Scandinavia, 2002-2006, percentage of national films on home market, Scandinavian market (only NO, SE and DK and European market, EU36 figures**



In this report we examine the Scandinavian film culture in a new context where films are no longer primarily locked into a national space and can no longer be seen only from the perspective of the cinema as the only place for film consumption. In the *new film culture* globalisation exists on many levels, and films can be seen on many platforms, not least by the younger generation. In fact, it has for a long time been obvious that although the mantra for film lovers has always been: ' films must be seen in the cinema', this is now far from being the actual pattern of film consumption. Nevertheless, cinemas are still an important part of the new film culture and will probably remain so in the future. After all, live music or live theatre did not disappear when music and theatre also found new platforms and new media.

It is a fact, that many films not only have an increasing audience internationally, but also that films shown on television (often repeatedly and on different channels) are by far the biggest window for films – at least in terms of numbers of viewers. Moreover, we are entering a new digital era where

Video on demand (VOD) and other online formats for film viewing will be crucial for a film's life in a longer time perspective. A film's life in the cinema may be a key and crucial window for the film, but in the long run the film's existence on all the other platforms will represent its actual cultural reach and importance. Thus, one of the main points this report wishes to highlight is that we need to readjust our image of the national and Scandinavian cinema to a much broader understanding of the film's actual place within in society, and that we need to face the challenges and possibilities of a new film culture with an open mind.