The market for foreign-language films in the UK

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Introduction

In this paper I am going to explore the market for foreign-language film in the UK. I particular, I am going to focus on the distribution and reception of foreign-language films in the UK, how this compares with the rest of Europe, and why only a minority of British cinemagoers engage with foreign-language movies. I will be drawing on research I have been doing for the 'Mediating Cultural Encounters through European Screens' (MeCETES) project at the University of York.

This is a 3-year European-funded research project, conducted in collaboration with the University of Copenhagen and the Vrije Universiteit Brussel, which examines the production, circulation and reception of contemporary European film and television drama. You can find more information about the project – as well as blogs, articles and working papers – on our website: www.mecetes.com

The market for foreign-language films in the UK

One of the trends which prompted our research into European screen drama is the increasing attention foreign-language films and television series have been enjoying lately in the UK.

In recent years, European films such as *Volver* (2006), *The Lives of Others* (2007), *Pan's Labyrinth* (2006) and *The Girl with the Dragon Tattoo* (2010) have performed remarkably well in the UK box office, with over £2 million in ticket sales each (table 1).[1] On television, Scandinavian crime dramas such as *The Killing* and *The Bridge* and the political thriller *Borgen* have become regular fixtures of BBC Four's Saturday night schedule, frequently pulling in over 1 million viewers, as well as generating huge discussion in the press and on social media.[2] Last year, Channel 4 broadcast its first foreign-language drama series in over 20 years when it premiered the French supernatural thriller *The Returned* to an audience of 1.9 million. Even Sky is getting in on the action – this autumn it airs *The Legacy*, a ten-part Danish drama series.[3]

And it's not just European titles which are enjoying a higher profile. Chinese 'wuxia' martial arts movies such as *Hero* (2004) and *House of Flying Daggers* (2004) have moved from the art house to the multiplex, winning over new audiences with their epic plotlines and superbly choreographed fight scenes. Meanwhile, Bollywood films such as *Never Say Goodbye (Kabhi Alvida Naa Kehna,* 2006) continue to perform well amongst Britain's South Asian community, sometimes crossing-over into the mainstream as well.

Table 1. Top 20 foreign language films released in the UK 2002-2013. Source: BFI.

Film	Year	Country	Box Office (£m)	Distributor	Languages
The Passion of the Christ	2004	USA	11.1	Icon	Aramaic/Latin/Hebrew
Apocalypto	2007	USA	4.1	Icon	Mayan
Hero	2004	Hong Kong/China	3.8	BVI	Mandarin
House of Flying Daggers	2004	China/Hong Kong	3.5	Pathé	Mandarin
Volver	2006	Spain	2.9	Pathé	Spanish
The Motorcycle Diaries	2004	US/Germany/UK/Argentina/Chile/Peru	2.7	Pathé	Spanish
The Lives of Others	2007	Germany	2.7	Lions Gate	German

[1] BFI, *Statistical Yearbooks 2002 – 2014*. http://www.bfi.org.uk/education-research/film-industry-statistics-research/statistical-yearbook

[2] BARB audience ratings are recorded on Wikipedia entries for 'The Killing', 'The Bridge' and 'Borgen'. See also John Plunkett. "The Killing is back with a bang". *The Guardian*, November 19, 2012. http://www.theguardian.com/media/2012/nov/19/the-killing-bbc4-tv-ratings

[3] Sky Arts. 'The Legacy: The Next Big Scandi Drama'. http://www.sky.com/tv/show/the-legacy/article/about

Coco Before Chanel	2009	France	2.6	Optimum	French
My Name is Khan	2010	India	2.6	20th Century Fox	Hindi
Pan's Labyrinth	2006	Mexico/Spain/USA	2.6	Optimum	Spanish
City of God	2003	Brazil	2.4	Buena Vista	Portuguese
Kabhi Alvida Naa Kehna	2006	India	2.1	Yash Raj	Hindi
The Girl with the Dragon Tattoo	2010	Sweden/Denmark/Germany	2.1	Momentum	Swedish
Untouchable	2012	France	2.0	Entertainment	French
Veer-Zaara	2004	India	2.0	Yash Raj	Hindi
Downfall	2005	Germany/Italy/Austria	1.9	Momentum	German
3 Idiots	2009	India	1.8	Adlabs	Hindi
Devdas	2002	India	1.7	Eros	Hindi
Kal Ho Naa Ho	2003	India	1.7	Yash Raj	Hindi
Y Tu Mama Tambien	2002	Mexico	1.62	Icon	Spanish

However, when we situate these achievements within the UK's broader media landscape, foreign-language films and television dramas still occupy a small and fairly niche market. Although foreign-language films accounted for 40% of the titles released in UK cinemas in 2013, they generated just 2% of total box office revenue.[4] That is about 3.6 million ticket sales – or just 13,000 admissions per release. In the same year, English-language films accounted for over 162m cinema admissions. *Despicable Me 2*, the UK's best-selling film of 2013, sold twice as many cinema tickets as all the year's foreign-language titles put together.

The pattern is much the same on television. The Spanish horror sequel *[Rec]2* had the highest TV audience for a foreign-language film in 2013, yet still only managed to attract little more than 200,000 viewers. Nordic crime dramas have frequently scored well over 1m viewers, but they are often up against shows like *X-Factor* or *Strictly Come Dancing*, which each pull in between 8 and 12 million viewers. The average television audience for a foreign-language film is just 80,000.

Comparisons with Europe

How does this situation compare to the rest of Europe? Within the EU market as a whole, domestic films account for about a quarter of cinema admissions. If we equate all the non-domestic films with films produced in another language (which is certainly not true in every case but a useful rule of thumb nevertheless), then foreign-language films represent about three-quarters of all European cinema admissions.[5] In countries where domestic film production is extremely weak – such as in central and eastern Europe – the proportion can be as high as 95% or more (figure 1).[6]

[4] BFI *Statistical Yearbook* 2014, p.54. http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-statistical-yearbook-2014.pdf

[5] European Audiovisual Observatory, *Statistical Yearbooks* 2005 -2013. See also Huw Jones. 'The circulation of European films'. MeCETES, April 11, 2014. http://mecetes.co.uk/circulation-european-films/

[6] MEDIA Salles. *European Cinema Yearbook 2012*. http://www.mediasalles.it/ybk2012/index.html

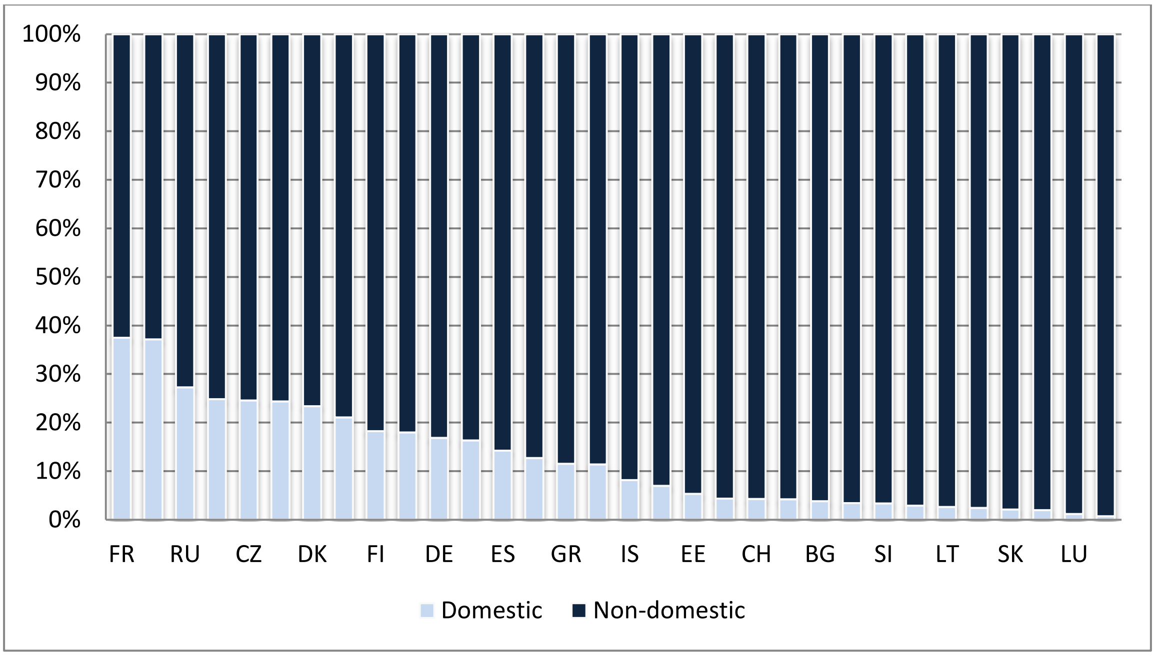

Figure 1. Cinema admissions for non-domestic/foreign-language films in Europe. Source: MEDIA Salles 2012.

Yet we need to keep a couple issues in mind. Firstly, in countries which form part of a large language community – namely France, Germany, Spain, Italy, Austria, Switzerland and the French-speaking part of Belgium – foreign-language films are normally dubbed into the local language (figure 2). It is only in countries with a small language community, where dubbing is not cost effective, that foreign-language films are consumed in their original version with the aid of subtitles.

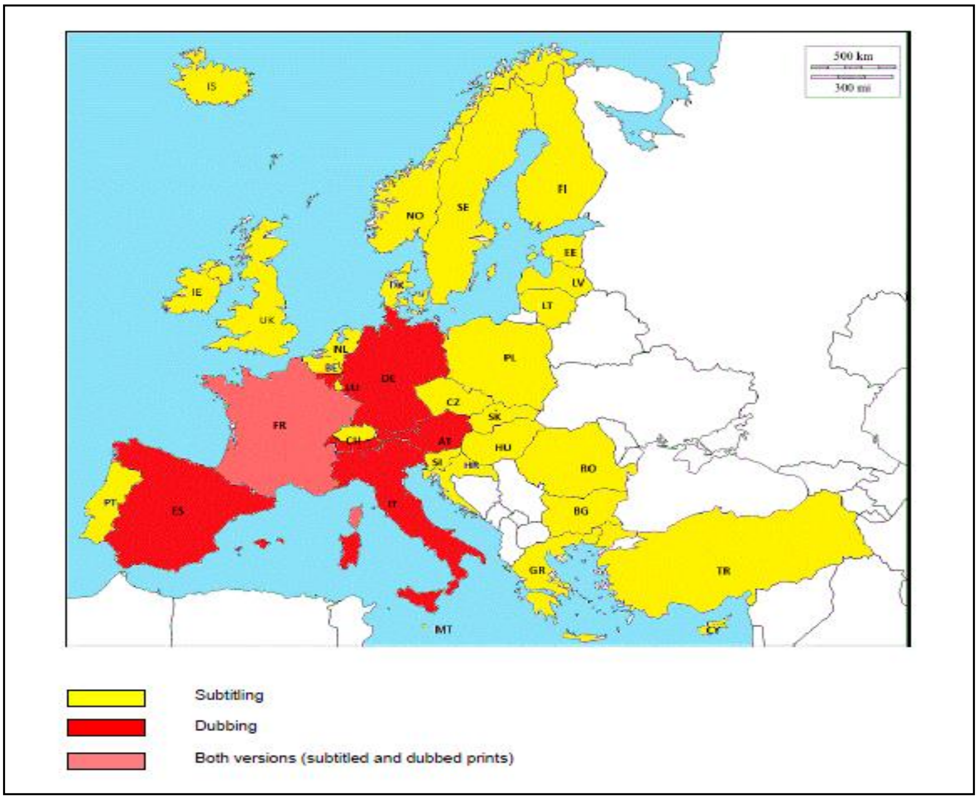

Figure 2. Language-transfer practices in Europe. Source: Media Consulting Group 2011.

Secondly, the majority of films watched in Europe are American. While these are consumed foreign-language films for most European countries, this is obviously not the case in the UK.

Nevertheless, even if we ignore American movies, Britain still has Europe's lowest market share for foreign-language films (figure 3). A recent EU survey, for example, asked audiences in ten European countries if, in the last few months, they had watched a foreign-language film (excluding US movies) on any platform – TV, DVD, VoD or the cinema.[7] In Lithuania, 19% of film consumers said they had watched 'many' foreign-language films. In Spain, the proportion was 18%, while in Romania it was 16%. The European average was 10%. In Britain, however, only 5% said they had been 'many' foreign-language films.

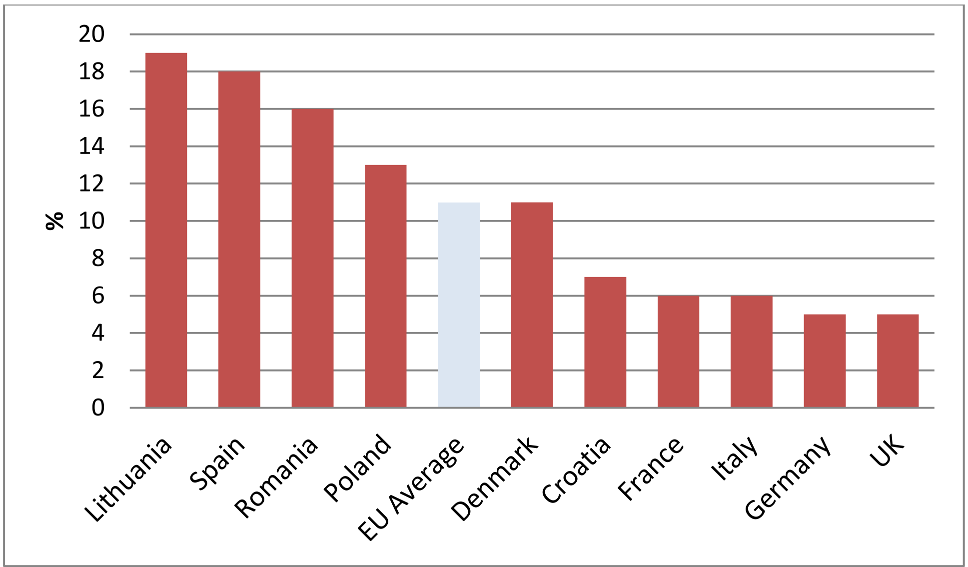

Figure 3. Proportion of film viewers who said they had seen 'many' foreign-language films (excluding US movies) in the past few months. Source: European Commission 2014.

Factors which affect foreign-language film consumption in the UK

Why do the British watch fewer foreign-language films than other Europeans? It's quite difficult to answer this question, because there is so little research on British attitudes towards foreign-language films. Although there have been a handful of studies on, say, the British audience for French films[8], have yet find any research which considers what you might call the 'resistant audience' – that is, those who for whatever reason never or rarely watch foreign-language films. My own project plans to address this gap through interviewing film and television audiences in the UK, Denmark and Belgium, but it is too early to offer any results.

In the meantime, I would like to suggest several likely factors which affect the consumption of foreign-language films in the UK. Firstly, many viewers are put off by subtitles, which can be difficult

[7] European Commission. 2014. *A Profile of Current and Future Audiovisual Audience*. http://bookshop.europa.eu/is-bin/INTERSHOP.enfinity/WFS/EU-Bookshop-Site/en_GB/-/EUR/ViewPublication-Start?PublicationKey=NC0114077

[8] For example: Melanie Selfe. 2010. 'Incredibly French?: Nation as an Interpretative Context for Extreme Cinema' and Ingrid Stigsdotter. 2010. 'British Audiences and 1990s French New Realism: La Vie Revee des Anges as Cinematic Slum Tourism'. In *Je T'Aime… Moi Non Plus: Franco-British Cinematic Relations*, edited by Lucy Mazdon and Catherine Wheatley. New York/Oxford: Berghahn Books.

to follow, do not always convey the full-meaning of the story, and require considerable concentration.[9] Children and pensions or those with poor sight or literacy find it especially hard to watch subtitled films. Genres like action-adventure or thriller which combine a lot of on-screen action and dialogue also present difficulties. While this is also clearly a problem for audiences in other European countries as well, they are in sense more used to subtitling – because unlike us they have to translate popular American films and television programmes as well as European imports.

Secondly, foreign-language films suffer from a perception problem. A survey of British audiences by the BFI, for example, found only 58% rated non-English language films as 'good' in terms of production qualities, compared with 93% for Hollywood films and 95% for British films.[10] When asked about the quality of the acting, 61% rated non-English language films as 'good', compared with 87% for Hollywood films and 94% for British films.

For various historical reasons, foreign-language films have become ghettoized into the 'art house' market in the UK. As such, they may be perceived as being arty and intellectual, while lacking the qualities most British audiences look for in film entertainment – big budget special effects and well-known stars. It is telling, for example, that three of the UK's top five foreign-language films of the last decade – *Apocalypto*, *Hero* and *House of Flying Daggers* – are ones which buck this trend with high octane action-adventure.

A third factor to consider is our general attitude towards other languages, cultures and nationalities. Some commentators believe the low level of British interest in foreign-language films stems from deeper cultural prejudices. Kilborn, for example, claims the British suffer from a "somewhat arrogant assumption that the majority of life's activities can be conducted in English".[11] He goes on: "This characteristically insular mindset has not only affected our readiness to learn foreign-languages, but also has an impact on audiences' response to foreign-language material".

It is certainly true that the British are worse at learning other languages. A recent survey by the British Council found that two-thirds cannot speak a foreign language.[12] Arguably, the British are quite insular looking. According to Euro-barometer, the EU's public opinion survey, only a third of Britons feel 'European' in some way, the lowest proportion of all EU member states.[13] However, poor language skills and a weak sense of European identity, doesn't necessarily make the Brits any less interested foreign-language films than other nationalities. In the aforementioned EU survey, for example, a quarter of Britons said there were not enough subtitled films in the UK.[14] Though below the European average (34%), this is on a par with Denmark (25%) and Germany (27%), countries where language skills and European identity are both strong.

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[9] Miguel Mera 1999. 'Read My Lips: Re-evaluating Subtitling and Dubbing in Europe'. *Links & Letters* 6: 73-85; Mireille Pelletier 2012. 'Subtitling and Dubbing: An Overview of a Few EU Countries". *The Annual of Language & Politics, Vol. VI*; Kilborn 1993. 'Speak My Language: Current Attitudes to Television Subtitling and Dubbing'. *Media, Culture and Society* 15: 641-660.
[10] BFI. 2011. *Opening Our Eyes: How Film Contributes to the Culture of the UK*. London: BFI, p.45.
[11] Kilborn, p.649.
[12] British Council. 2013. *Languages for the Future: Which Languages the UK Needs Most and Why.* http://www.britishcouncil.org/sites/britishcouncil.uk2/files/languages-for-the-future-report.pdf
[13] European Commission. 2014. *Standard Eurobarometer 81: Spring 2014 – European Citizenship*, p. 14. http://ec.europa.eu/public_opinion/archives/eb/eb81/eb81_citizen_en.pdf
[14] European Commission. *A Profile of Current and Future Audiovisual Audience*, p.14.

Indeed, the relationship between language ability and foreign-language film consumption is not so clear-cut. According to the latest census, over half a million people speak Polish in England and Wales.[15] Yet Polish-language films rank twelfth in terms of film-language popularity. Similarly, Panjabi, Urdu, Bengali and Gujarati are spoken by almost 1 million people in the UK, but admissions for films in these languages are negligible. Meanwhile, Swedish-language films are amongst the most popular foreign-language films in the UK, even though very few people in Britain can speak that language.

This points to a fourth factor which affects the consumption of foreign-language films in the UK – their poor distribution and limited availability. Foreign-language films find it much harder to make into British cinemas than English-language films. At their widest point of release, foreign-language films are shown in just 17 theatres across the country.[16] Compare that with 168 theatres for most English language releases. Even a critically acclaimed drama like *Amour*, which had picked up the prestigious Palme d'Or award at Cannes prior to its UK release, was only shown in 49 theatres at its peaks.[17] On average, foreign-language films last just 4 weeks in the cinema, compared to 11 weeks for English-language films.[18]

Part of the problems is that distributors of foreign-language films tend to be small, independent companies. Unlike major US distributors, subsidiaries of Hollywood studios, these independent distributors lack the resources to launch nationwide marketing campaigns and have far less leverage with exhibitors. Indeed, few cinemas in Britain – the majority of which are Hollywood-orientated multiplexes – are willing to show foreign-language films. Outside London only 7% of UK screens (mostly small independent cinemas) are dedicated to specialised programming, and most of these (84.3%) are located in major towns and cities.[19] In Wales, there are only seven specialised screens (2.6% of total); in Northern Ireland, there are just two (0.7% of total). Furthermore, foreign-language films are increasingly being squeezed out of cinema programmes by pseudo-indie Hollywood films or other specialist screenings, such as documentaries and live theatre events.

Of course, cinemas are not the only outlet for foreign-languages films. Audiences can watch such films on TV and DVD. But even on these other platforms, availability is still limited. For example, only 2.4% of films shown on British terrestrial television are foreign-language, and many of these are scheduled very late at night.[20] The increasingly availability VoD services such as Amazon Prime and Netflix – the market value for which has increased by 50% since 2011 to reach £243 million – should make it easier to access specialist content. However, as recent survey by the European Audiovisual Observatory found that only 8 of the 50 most commercial and critically successful European titles of recent years were available on the UK version of Netflix, while only 6 were available on Sky.[21]

Efforts have been made to improve the availability of foreign language films. In 2012, the EU's MEDIA programme awarded UK distributors over €1.3 million to support the distribution of European films

[15] Office for National Statistics. Statistical Bulletin: 2011 Census: Quick Statistics for England and Wales, March 2011, p.9. http://www.ons.gov.uk/ons/dcp171778_297002.pdf
[16] BFI. *Statistical Yearbook 2014*, p.50.
[17] Box Office Mojo. 'Amour – United Kingdom and Ireland and Malta: Weekend Box Office'. http://boxofficemojo.com/movies/?page=intl&country=UK&id=amour.htm
[18] BFI. *Statistical Yearbook 2014*, p.20.
[19] BFI. *Statistical Yearbook 2014*, p.111.
[20] BFI. *Statistical Yearbook 2014*, p.143.
[21] European Audiovisual Observatory. 2013. *Availability of a Sample of European Films on VoD services.* http://www.obs.coe.int/documents/205595/264625/PublicHearing18-11-2013+Promotion+of+European+films+and+TV+series+online.pdf/be6f45cd-cc87-4a93-9709-35e7e844f58d

in the UK, while the Europa network, a chain of 54 cinemas which specialises in screening European film, received a further €900,000.[22] Furthermore, as part of a strategy to boast the online-distribution of European films, Curzon Cinemas received €400,000 to expand its new Video-on-Demand service, which specialises in art house and foreign-language feature films. Meanwhile, the British Film Institute (BFI) provides additional support to foreign-language films and specialist cinemas through its Distribution and Audience Funds. Its own new Video-on-Demand service – the BFI Player – includes a good selection of foreign-language films, including a number of landmark Chinese dramas.[23]

However, public investment in distribution and audience development doesn't necessarily guarantee box office success. For example, in 2012 Soda Pictures received £28,000 from the MEDIA programme for *Paradise: Love*, an Austrian comedy, yet only managed to sell 2,224 tickets in the UK.[24] In other words, the MEDIA programme subsidised each audience member by £12.50.

The audiences for foreign-language films

Despite the problems of distribution, many do get the chance to watch foreign-language films. According to recent BFI survey, almost half of British people have seen at least one foreign-language film in the last 12 months on any platform – cinema, TV, DVD or VOD.[25] However, only 14% said they liked foreign-language films, while just 2% said they watched this genre more than any other. This suggests that while many people do encounter foreign-language films, they don't always like them, and only a very small minority prefer them to other types of film.

Foreign-language films tend to appeal to a particular audience. Of the 2% of survey respondents who said they watched foreign-language films 'most-often' across all platforms, a higher proportion than average were aged 25 to 44. Full-time students, people with an income below £30,000 and those who lived in urban areas were also over-represented, as were people with a degree or above. London had the highest proportion of foreign-language film fans; Northern Ireland had the lowest.

The proportion of men and women were broadly similar. However, people from minority ethnic groups were twice as likely to prefer non-English language films as white people, which is perhaps due to the popularity of Hindi-language Bollywood films amongst Britain's South Asian community. Moreover, white people of 'other white backgrounds' are also two-times more likely to prefer foreign-language films than white British and Irish people. I suspect that this is because some of the audience for non-English language films are European migrants from, say, France or Spain, who are watching films in their own language.

The survey found that foreign-language film fans are generally more interested in film than most – they were more likely to watch films online at least once a week and visit the cinema at least once a month. They also have a greater knowledge of film – 38% could name 20 or more recent film titles (compared with 32% for the sample as a whole), while 51% had seen 10 or more films in the last 12 months (compared with 36% on average). In terms of lifestyle, foreign-language film fans are most likely to visit museums, art galleries or live music concerts at least every six months, and read pages

[22] MEDIA Desk UK. 2013. *MEDIA in the UK 2012*. London: MEDIA Desk UK, pp.6-11.
[23] http://player.bfi.org.uk/
[24] MEDIA Desk UK. 2013. *MEDIA in the UK 2012*, p.7.
[25] BFI. 2011. *Opening Our Eyes: How Film Contributes to the Culture of the UK*.. Calculations made using the SPSS data available at: http://www.bfi.org.uk/about-bfi/policy-strategy/opening-our-eyes-how-film-contributes-culture-uk

from a non-fiction book every week. They are also more likely to be interested in global affairs, world history, the arts and the countryside. Tellingly, they were most likely to see film as 'rewarding' and least likely to call it 'entertaining'. Thus a picture begins to emerge of the typical foreign-language film fan as someone who is young-to-middle-aged, well-educated but not necessarily well-off, highly knowledgeable about film, as well as other cultural activities, and usually living in an urban environment. Put simply, foreign-language films appeal most to those with a high degree of cultural capital.

That said, we need to be careful about stereotyping the foreign-language film audience. If we look at foreign-language films which have been most popular over the last decade, there is a great diversity of genres on offer. These include:

- Hollywood-style blockbusters like Mel Gibson's *Passion of the Christ* and *Apocalypto*;
- Epic Chinese 'wuxia' films like *Hero* and *House of Flying Daggers*;
- Critically acclaimed dramas by celebrated European directors like Pedro Almodovar's *Volver*.
- Biopics which explore the lives of global icons like *Coco Before Chanel* or *The Motorcycle Diaries*, about the Argentinian-born revolution Che Guavara.
- Historical dramas which interrogate Europe's difficult past, such as *The Lives of Others* or *Downfall*
- Cult movies from Latin American like *City of God* and *Y Tu Mama Tambian*, which introduced us to superb visions of directors like Fernando Meirelles and Alfonso Cuaron.
- Nordic Noir crime dramas like *The Girl with the Dragon Tattoo.*
- Hit comedies like *Untouchable*.
- Theatrical Bollywood films which combine music, dance, comedy and romance like *Never Say Goodbye* and *3 Idiots*.

Each of these films potentially appeals to a multitude of different audiences. We therefore need to keep in mind that the market for foreign-language films in the UK is not one single entity – it encompasses a variety of different film cultures.

Conclusion

So to conclude: the market for foreign-language films in the UK may well be small in comparison to the rest of Europe, but it is nevertheless extremely diverse. And that is what makes it so interesting and exciting. Foreign-language films offer audiences insights into many different cultures, places and ideas. They broaden our view of the world. The challenge for industry players and policymakers is not only to overcome the practical difficulties to do with the limited availability of foreign-language films in cinemas or on television, or making things like subtitles more accessible. It is also about changing people's perceptions by showing that foreign-language films may offer something for everyone.

Word count: 3,535.