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# Work Package 3

Partners:

AU, TLU, VUB, LU, BFMC,  
IRMO



## Agenda

- Purpose and aims of of D3.1: "State of the art of European small film markets vs international competitors"
- Brief introduction to the website (D3.1. is an "interactive report")
- Methodology (Cathrin)
- Small Film Industries: spidergraphs as portrait feature (Marius)
- Performance Indicator-example: VOD circulation (Cathrin)
- Comparison With Larger Markets (Ivana)
- Rounding off, brief remarks about The Bigger Picture (Jakob)
- Q & A

## **Purpose & Aims of D3.1: "State of the art of European small film markets vs international competitors"**

- "provides a comparative analysis of the state of the art of Europe's small nation film industries represented in CRESCINE"
- "gather empirical evidence for their traits and differences regarding their position within their domestic and the international market"
- "identifies the competitive advantages and disadvantages of EU small nation film industries compared to the rest of the EU, particularly to large markets"



# Work Package 3: Comparing Small Film Industries

# The state of the art of European small film markets vs. international competitors

[Small Film Industries](#)
[Performance Indicators](#)
[Comparison with Bigger Markets](#)
[The Bigger Picture](#)
[Methodology](#)
[Team](#)

## Small Film Industries

Industries in Focus introductory text here, Industries in Focus introductory text here, Industries in Focus introductory text here,



Lithuania



Croatia



Portugal



Denmark



Flanders



Estonia



Ireland

## International competitors

[Introduction](#)  
[Small Film Industries](#) [Performance Indicators](#)  
[Comparison with Bigger Markets](#) [The Bigger Picture](#)  
[Methodology](#) [Team](#)

## Small Film Industries

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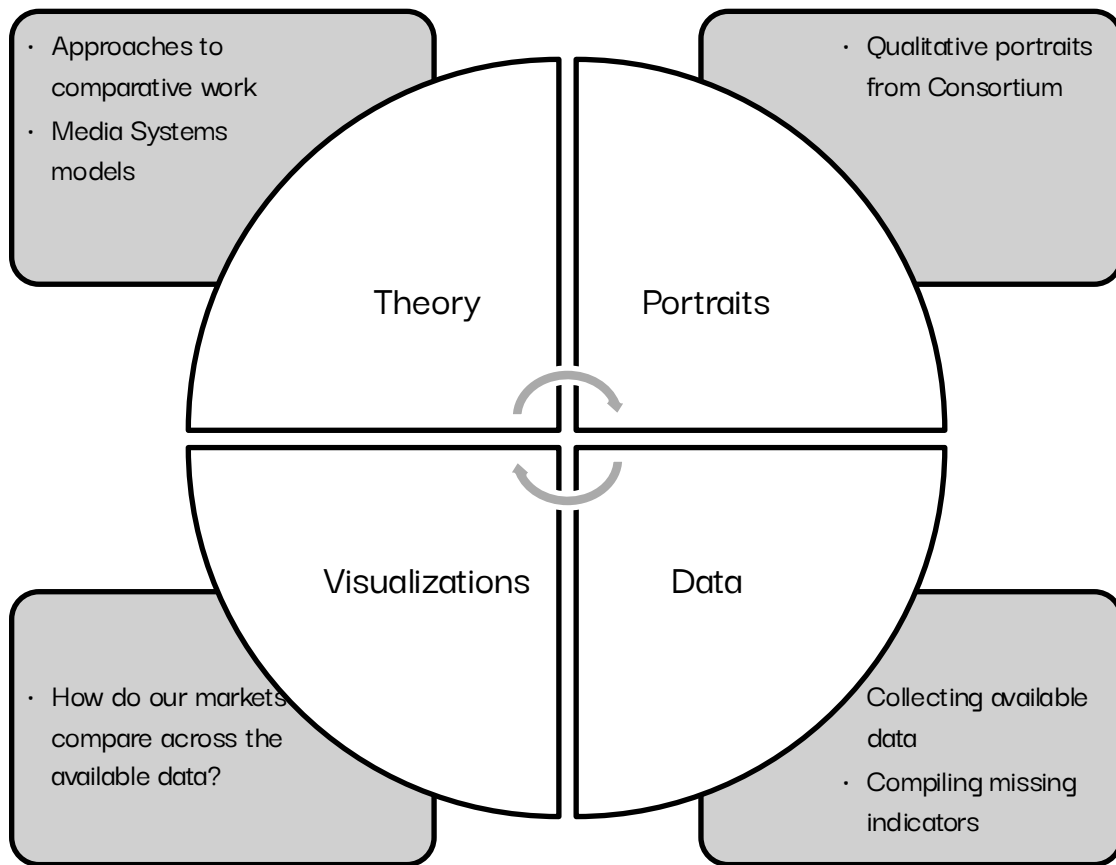
Estonia



Ireland

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## Our process



**Data requests**

- Structured request for data and qualitative market portrait from consortium
- Public funding and investment scheme data for period of interest

**EAO**

- 30 Market indicators (e.g. prod. Volume, avg. budget)
- Eurostat data (e.g. inhabitants, purchasing power, use of VoD)

**Lumière Pro**

- Admissions of all Features (domestic & internationally)
- Additional information on genre, directors

**Lumière VoD**

- European titles in ca. 1200 catalogues available in Europe
- Matching of availability of features in EU27+UK & characterizing VoD infrastructure

**Festivals**

- Collection of festival participation & awards for Venice, Tribeca, TIFF, Telluride, Sundance, San Sebastian, Locarno, Karlovy Vary, Annecy, Busan, IFFR, IDFA, EFA, Cannes, Berlinale, Academy Awards

Indicators show performance compared to the average of all CRESCINE markets from 2014 to 2022.

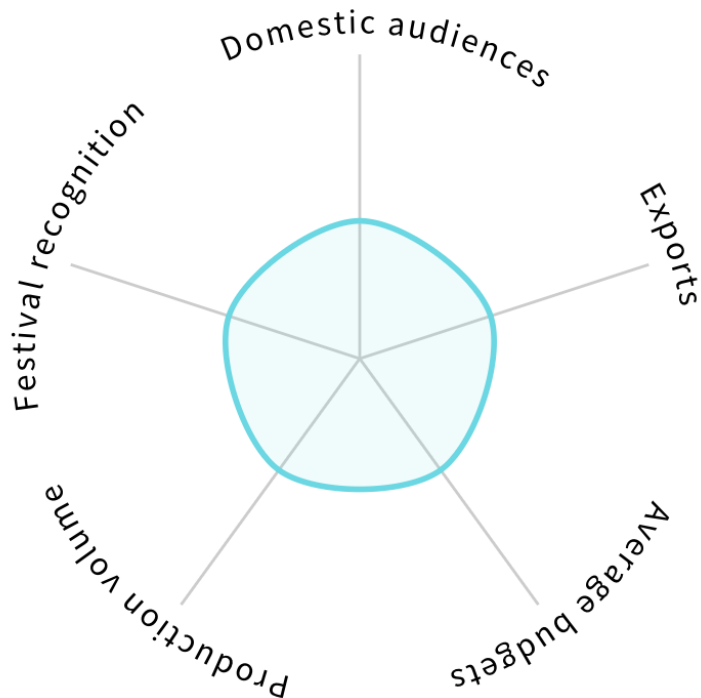
**Domestic audiences:** Share of domestic admissions (EAO)

**Exports:** Average non-national admissions (Lumiere Pro)

**Average budgets:** Average budgets (EAO)

**Production volume:** Total number of national and majority feature productions, including documentaries (EAO).

**Festival recognition:** Score based on the Swedish Film Institute's scoring system (will be updated with more festivals)



## Lithuania: Small industry with local success

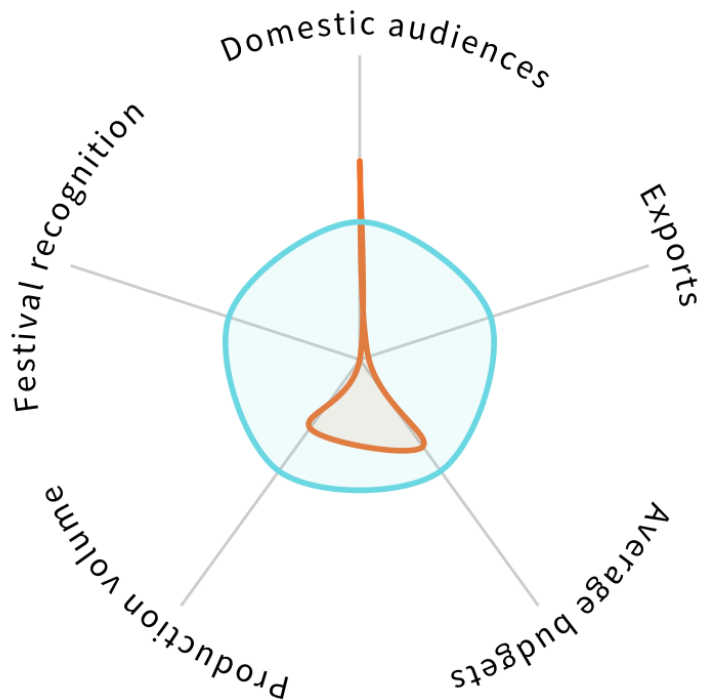
**Domestic audiences:** 19.07% domestic share

**Exports:** 2.852 non-national admissions pr title

**Average budgets:** € 1.230.857

**Production volume:** 14

**Festival recognition:** 0



## Ireland: Small local audiences, high budgets and exports

**Domestic audiences:** 3%

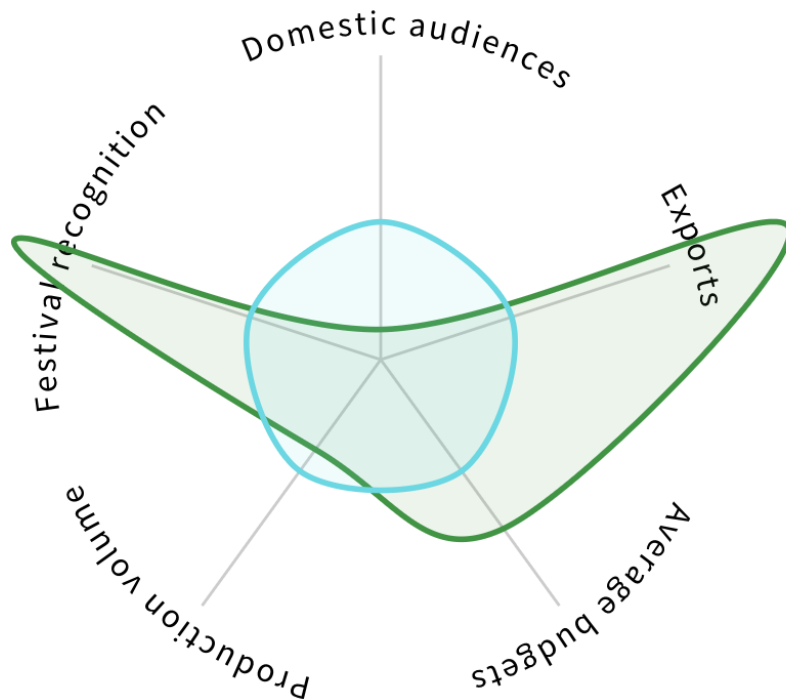
**Exports:** 136.036 non-national admissions pr title

**Average budgets:** € 2.393.446

**Production volume:** 18,4

**Festival recognition:** 0.45

- *The Lobster* (Yorgos Lanthimos) Cannes (2015), Winner: Prix du Jury;
- *Float Like a Butterfly* (Carmel Winters) Toronto (2018), Winner: FIPRESCI Discovery Prize;
- *Room* (Lenny Abrahamson) Toronto (2015), People's Choice Award



**Denmark: High volume, high budgets and strong local audiences**

**Domestic audiences:** 31%

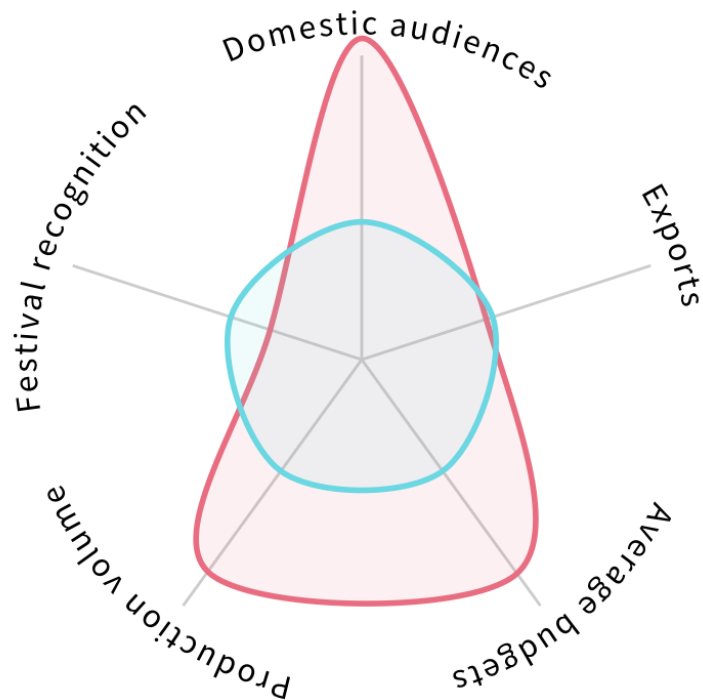
**Exports:** 41.533 non-national admissions pr title

**Average budgets:** € 3.028.529

**Production volume:** 43

**Festival recognition:** 0,11

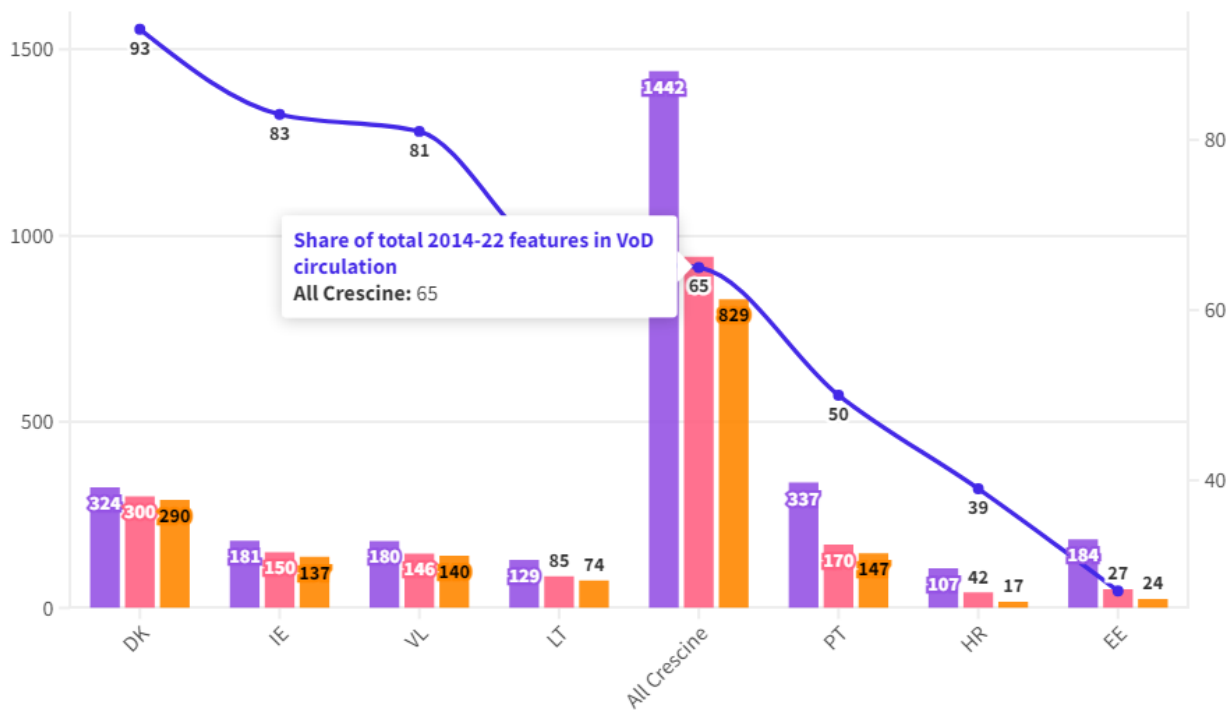
- The Cave (Feras Fayyad) Toronto (2019), Winner: People's Choice Award: Documentary



## Circulation of Crescine Features on VoD (Oct 2023)

October 2023

■ Share of total 2014-22 features in VoD circulation 
 ■ Total features 
 ■ Number of features circulating on VoD 
 ■ Features in domestic catalogues



### What makes Crescine features circulate?

- Developed domestic VoD market
  - Box office performance
  - Internationally recognizable stars
  - International recognition
  - Genre (e.g. Horror)
- WP6 will dig deeper

# Orientation of Crescine markets

