European
Women's
Audiovisual
Network

WHERE ARE THE WOMEN DIRECTORS ?

Report on gender equality for directors in the European film industry

2006-2013

In collaboration with

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Introduction

This report is the culmination of a two-year process and brings together comparative research from seven European countries: Austria, Croatia, France, Germany, Italy, Sweden and the United Kingdom. It is a response by the European Women's Audiovisual Network (EWA) to growing concern worldwide about the marginalisation of female directors in our film culture and aims to provide the evidence to inform policy change at national and European level.

In United Nations Charters, European treaties and national policy statements there is a commitment to gender equality. Yet EWA's findings show that the structure of Europe's film industries do not support this. Instead inequality is being perpetuated by a combination of factors including the competitive habits of the marketplace, contemporary industry structures, the impact of new technologies and false assumptions about women's abilities and business risk.

There have been periods more favourable to women, notably in the 1980s and 1990s when in some countries it seemed that problems of discrimination were being addressed. However, the privileging of male over female directors continues in most institutions considered in this report and the ongoing failure to collect and monitor statistics coherently is symptomatic of a failure to take this issue seriously.

This report calls for affirmative action to transform this status quo. It makes fifteen recommendations, many based on best practice, which will address the challenges female directors face in sustaining their careers. EWA believes strongly in the powerful impact of the audiovisual media on our societies. Since 2013 there have been several initiatives, particularly in Sweden, which are not reflected in the scope of this report but are to be welcomed. By realising female directors' full potential our industries will be strengthened and diversity of form and perspective will be more successfully represented on our screens.

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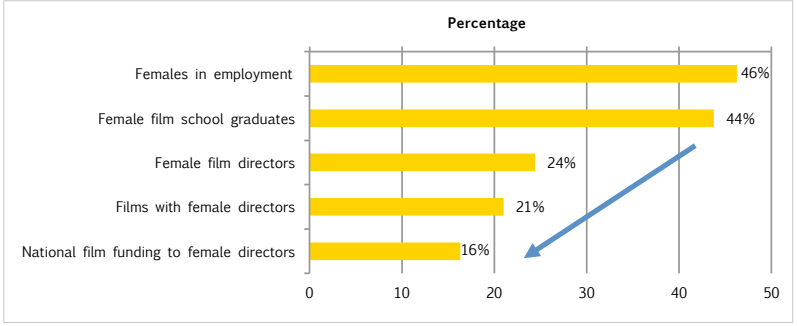
I. Executive summary and recommendations

The report shows that there is a significant under-representation of female directors in all levels of the industry, even though there is an almost equal share of women graduating from film schools.

- Only one in five films in the seven European countries studied is directed by a woman (21%). This means four out five films are NOT directed by a woman.
- The vast majority of the funding resources (namely 84%) go into films that are NOT directed by women.
- Low funding perpetuates the scarcity of female-directed films in circulation, in turn affecting the markets' willingness to invest and thus creating a vicious circle.
- There is a significant difference between the proportion of female directors graduating from film schools and entering the film industry (44%) and the overall proportion of female directors working in the industry (24%).
- The high proportion of female graduates shows that the talent exists but the potential is not fully exploited by the industry.

Figure 1: Loss of female directors from the workforce



Source: EWA report database – Survey

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1.1 Barriers preventing women from working in the industry

- *Gender bias in the industry.* Over three quarters of respondents to EWA's questionnaire, released in all seven of the countries, feel that gender inequality exists, with the highest results in Germany and the UK. Of the male respondents only half are convinced.
- *The struggle for funding* is identified as women's most significant challenge, both economically, given their unequal status in the marketplace, and creatively, in terms of the range of stories they want to tell.
- *Risk aversion on the part of investors.* A significant number of respondents believe a female director negatively impacts on funding decisions: 56% negative for private funders and, remarkably, 31% for public funders across the board.
- *Lower share of broadcasting funds for female directors*: especially significant as directors move between cinema and television to sustain their careers.
- *Low representation of women on commissioning and funding panels*, and low awareness by these panels of inequality.

Given the findings of the report, this is not only unjustified but also counter productive since women's films are proportionately more likely to take part in festivals, to win awards and in some instances have a higher average number of admissions per film than those of their male counterparts.

1.2 Quality of female-directed films: awards and nominations

- Results for 2013, EWA's sample year, show that for the seven countries overall a higher proportion of female-directed films participate both in national and international festivals, and that female-directed films win more awards than films directed by men.
- Female-directed films are nonetheless significantly under-represented at A-list festivals. Evidence of their critical success undermines claims about quality used to justify their marginalisation.

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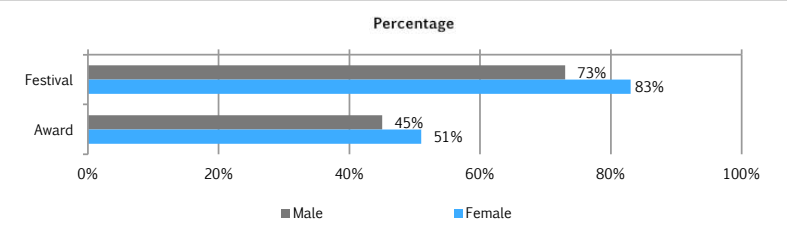
Figure 2: Gender share of overall festival participation and awards



Source: EWA report database - Festivals and Awards
Note: percentage refers to all films directed by men (=100%) or women (=100%)

1.3 Additional factors keeping female directors out of the industry

- *Inequality in average funding awards.* Female directors of fiction films receive less funding per project from national funds than their male counterparts. For documentaries, funding has been more equally shared, and in some cases (Croatia and the UK), female directors have been awarded larger amounts than their male counterparts. In the public broadcast sector, the proportion of investment going to female directors of fiction is even lower than that for national funds, though the investment is higher for documentary.
- *Distrust of female directors in delivering films with higher budgets.* The stronger presence of women as directors of documentaries is indicative of the fact that female directors fare better where budgets are smaller.
- *Pay differentials between men and women.* With the exception of France, none of the countries in the report appear to monitor data on comparative earnings for female directors. However, if French findings are typical, they reveal that between 2009 and 2012 their average earnings were 31.5% lower than male directors' earnings on a euro per hour basis.
- *Failure to support directors who are parents.* It is not parenting in itself which is a problem but the industry's lack of adjustment to the way in which this affects career progression, for instance re-entry into the market after starting a family, or the demands of childcare during production.
- *Absence of statistics.* Few national institutions collect data and even fewer carry out data monitoring. In the context of this report, with the exception of

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the Swedish Film Institute, there is a lack of a coherent, evidence-based strategy within leading institutions to address inequality.

- *Low support for distribution.* Almost all respondents recognised the need for greater support to boost visibility for female-directed films and develop distribution strategies.

1.4 The way forward

There is almost universal recognition that more female-directed films in circulation would impact on the representation of women, promote equality and encourage tolerance in our society. Furthermore, the most important way to encourage women to direct is by showing more of their films on television and cinema screens.

There is broad support for policy change, including measures to:

- Address the under-representation of female directors in educational programmes;
- Equalise the distribution of public funds;
- Achieve equal representation and greater awareness on commissioning boards;
- Incentivise producers to support female directors;
- Provide much greater support and a targeted strategy for publicity, advertising and distribution.

Almost 70% of respondents supported quotas to achieve equality targets. Support for this measure in the participating countries ranged from 58% in France to 83% in the UK.

Overall, this report finds that policy on gender equality is piecemeal and poorly monitored in most public institutions in the film and audiovisual industry, and many private stakeholders keep no statistics at all. This is indicative of the continuing failure of the European film industry to take gender inequality seriously. Even though it may be argued that a competitive marketplace and job instability impact on male directors as well, their critical mass, propped up by the inherent bias of the industry, means they are far less affected. In contrast, for female directors, the combination of factors revealed in this report conspire to make their careers less sustainable, depriving audiences of their vision and talent, and leading to a critical imbalance in film culture in Europe.

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1.5 Recommendations

Whereas the evidence of this report shows that gender inequality persists for Europe's female film directors in seven countries, representing small, medium and large audiovisual industries,

Whereas in spite of gender equality being mainstreamed both in European Union and Council of Europe policy, an acceptance of 'the market' in audiovisual production is weakening *cultural* and *educational* aims with regard to gender equality in the film industry, which are the proper concern of public funding and public institutions,

Considering the impact of digital technology on traditional distinctions between film, television and telecommunications and its potential to affect the visibility of female-directed films,

And drawing on the aims of *The Sarajevo Declaration, August 2015*[1] and proposals for the European film industry adopted in October 2015 by the Council of Europe's film fund, *Eurimages,*

EWA recommends that

1. The European Commission and the European Parliament urgently address equality agendas in the audiovisual industry.
2. All European supranational film and audiovisual funds, in particular Creative Europe's MEDIA Sub-programme, noting and emulating where appropriate the Council of Europe's initiatives, should actively address gender equality issues in all their policies, measures and support programmes: these should include training, distribution, exhibition, festivals and audience support, as well as media literacy initiatives.
3. In any future revision of the European Union's E-Commerce Directive or the AVMS Directive attention should be given to improving measures for gender equality and the visibility of female-directed films and audiovisual works.
4. Member funds of pan-European associations, such as the EFAD (European Film Agency Directors), and CineRegio (Association of European Regional Film Funds), drawing on the expertise of EFARN (European Film Agency Research Network)

[1] *Sarajevo Declaration to the Council of Europe, Sarajevo Film Festival, 2015*

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and/or the European Audiovisual Observatory (EAO), should do their best to adopt a common approach to data gathering and analysis on gender equality by their members through agreed common indicators and standardised sets of data, as well as committing to the publication of this data on a regular basis and the exchange of best practice.

5. These organisations should be strongly encouraged to dedicate a section of their websites to the issue of gender equality where the results of the research and studies undertaken at European or national level can be published.

6. The European Broadcasting Union should encourage its members to agree common indicators to analyse gender equality in programme output, commissions and acquisitions, with regard to female directors, and this data should be monitored and published on a regular basis in order to track trends and progress.

7. The International Association of Film and Television Schools (CILECT) should encourage all members to maintain and monitor statistics on gender equality regarding applicants as well as graduates; to ensure gender equality amongst teaching staff; and to ensure greater visibility for female directors in all curricula and source materials.

8. National film institutes should review gender equality and adopt action plans to include:

    - Adequate systems for data gathering and analysis on gender equality for film directors, with results being monitored and published on an annual basis. Statistics should include data on applications as well as awards;
    - Initiatives to raise awareness and promote debate on the issue of women's marginalisation and image misrepresentation in the media, in particular aimed at investors, producers and distributors;
    - 5-year targets for all funding schemes (excepting those for first-time directors) to achieve an equal share of funding for female directors, to be averaged over 3-year periods in order to take into account annual variations in applications;
    - Programmes for first-time directors allocating an equal share of funding to female directors with immediate effect;
    - An equal share of funding for all schemes targeting first-time directors;
    - Consideration, where applicable, of female directors' particular trajectory through the industry with regard to targeted funds for development and support for new directors;
    - Recommendations on adding childcare as a line in production budgets;
    - Increased support for publicity, advertising and distribution strategies for female-directed films with particular attention to the distinctive needs of first, second and subsequent productions;
    - Lobbying to encourage investors and cinema owners/programmers to work for gender equality in film investment and exhibition.

9. Audiovisual funds covering more than one European country, such as the Nordisk Film & TV Fond in the Nordic countries, and regional funds within countries, should also review gender equality and adopt action plans in the same manner as national film institutes.

10. National regulatory bodies with responsibility for media and broadcasting, both private and public, terrestrial and online, should adopt measures to encourage gender equality and visibility for works by female directors, including developments in video-on-demand (VOD) and subscription video-on-demand (SVOD) platforms.

11. Public service broadcasters should review policies for gender equality and adopt action plans to include:

    - Targets to achieve a minimum 40% share for female directors of feature-length dramas and documentaries of over 60 minutes;
    - Equal gender representation in commissioning and funding committees.

12. Measures should be taken to monitor and increase the visibility of female-directed films in school curricula, school film clubs, cinematheques and video-on-demand services.

13. All commissioning bodies, policy-making boards, selection panels and juries should be composed on the basis of gender parity.

14. Further research should be funded, whether through national or regional organisations, to include:

    - Case-study research with female directors of different generations to further our understanding of women's trajectory in the profession;
    - Analysis of the way gender impacts on investor and commissioning

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decision-making;

- Analysis of the route to the market for female-directed films, including a focus on the effectiveness of support for publicity, advertising and the validity of distribution strategy.

15. On the basis of EWA's findings, we recommend that symposia should be held in each country, with key stakeholders being invited, to raise awareness, to identify and systematise data-gathering needs and to agree targeted action plans.

EWA is ready to co-operate on an advisory basis with industry and institutional actors in the implementation of these recommendations.

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II. Methodology

This project has been designed to follow female directors through the trajectory of their careers and to identify key factors which obstruct their progression in the industry. Its scope does not include representational, on-screen issues.

In relation to funding, the focus has been on the distribution of national funds and the role played by public service broadcasting, the two most significant drivers for local content, both of which are funded by and accountable to national citizens.

EWA's data has been gathered through two sources: a comprehensive survey of national contexts and statistics provided by the seven research teams, and a questionnaire distributed through national professional organisations to almost 900 professionals, male and female, working in and associated with the European film industry. The results have been analysed with the assistance of experts from Sheffield Hallam and Rostock Universities. Findings have been discussed at a series of meetings held during the research period. Both Austria and Germany joined late in the process, in summer 2015.

In the presentation of the report the findings from both sources are presented alongside to complement the emerging picture.

It should be noted that the countries included in this report have very different scales of production and belong to different EU classifications for industry size: Croatia – small; Austria and Sweden – medium; France, Germany, Italy and the UK – large.

Given the scale of American investment in the UK industry, this report only focuses on independent British productions, i.e. films made without creative or financial input from the major US studio companies. Figures for nationally funded production refer only to the British Film Institute's (BFI) lottery-funded production. Figures for releases and admissions also include data on *all* independent films which include BFI lottery funded productions.

In the case of Germany, figures have only been available for fiction between the years 2009 and 2013.

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2.1 Quantitative survey

The research covers the period 2006–2013 where data exists. Participating countries answered an extensive set of questions eliciting information on the contexts and numbers affecting women directors in their industries.

Statistics kept by different countries vary considerably and much of the data has had to be mined by national researchers. Key variations are noted where relevant to the findings.

To compensate for the high annual fluctuations characteristic of the industry, the report tracks progression where possible by gathering results across two periods of four years: 2006-2009 and 2010-2013.

The project includes documentary and fiction films of 60 minutes and over, in both the film and public broadcasting sectors, although information on gender equality in the broadcasting sector has been especially difficult to access and is incomplete. The data does not include short films and animation, albeit that these are important for entry points for women, particularly in countries with a lower scale of audiovisual production, such as Croatia.

With regard to funding, this report focuses on the distribution of national funds and the role played by public service broadcasting, the two most significant sources of funding for local content which are accountable to the public. There is also reference to private broadcaster funding although data is very limited and restricted to two countries, France and Sweden. With the exception of Croatia, where nation size militates against separate regional funds, all countries benefit from regional funds, most but not all of which are financed wholly or in part by the national film fund. These inputs are significant for female directors. However, given the variations both in available data and what it represents, this data has not been included in the comparative report but has been included in some of the national reports.

Production and development funds can be allocated across more than one year but for the purposes of the report they have been included in the first year of production.

Where films have been directed by more than one director, each director is counted as a fraction of 1. The exception is Austria, where films are ascribed to the gender of the first director listed in the credits, and Germany, where films with more than one director are excluded.

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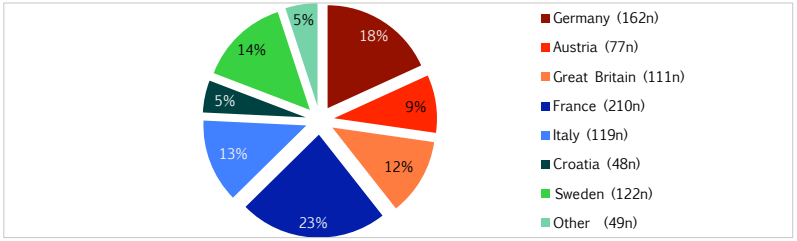
2.2 Questionnaire

The questionnaire was distributed in July 2015 by national researchers through the professional organisations of their industry, including directors' guilds, unions, broadcasting institutions and national film schools.

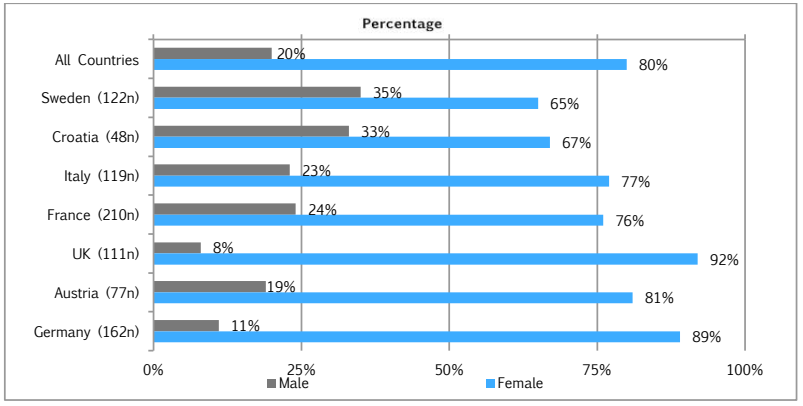
Figure 3: Number of questionnaire respondents according to country



Source: EWA report database – Questionnaire
Note: n = number of respondents

Most of the respondents of the questionnaire are female (80%). Only 20% are male so any interpretation of the results according to gender has to take this into account.

Figure 4: Questionnaire respondents according to gender



Source: EWA report database – Questionnaire
Note: n = number of respondents

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Whilst the gender imbalance is similar in most of the countries, in Sweden and Croatia there is a male share of about a third and in these two cases the gender divide impacts on the results more significantly.

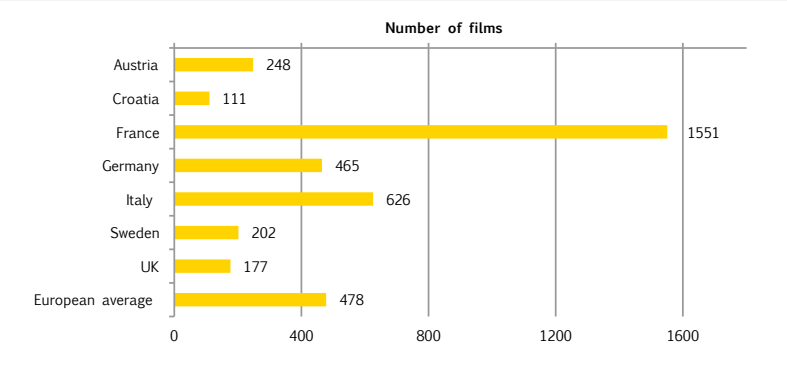
Several questions invited respondents to select more than one option, so the results do not always add up to 100.

Where respondents are invited to select answers on a 1-4 scale, the method of interpretation takes the top two options, for example "very important" plus "important" or "applies fully" plus "applies". Exceptions are noted.

Results of the questionnaire will inevitably be influenced by national contexts of interpretation, which are hard to track. National researchers have contributed observations where relevant.

2.3 Contrasting scale of national industries

Figure 5: Number of films supported by national film fund (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for Austria and Germany are for 2009-2013; for Croatia 2008-2013
2. UK data relates to BFI Lottery-funded films only
3. Croatia, Sweden & UK include only fully funded films and majority funded co-productions. France, Germany, Italy and Austria also include minority co-productions

The scale of the seven national industries included in this report varies considerably. Whereas France, the largest, funded 1,551 films and released 2,132 films over the

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full period 2006-2013, Croatia, the smallest producer, produced and released 79. In Croatia, given the small scale of the industry, all film production depends on some level of national support. Figures for Italy and France are above EWA's European average for nationally funded production (478). In France the number of films supported is almost double that of the next largest producer, Italy. Figures for the UK are lower than might be expected as they are based only on productions funded by the British Film Institute's (BFI) lottery-funded production.

It should be noted that some countries' figures include only entirely national films and majority funded co-productions (Croatia, Sweden, UK) whilst others include all films with some national investment including minority co-productions (France, Germany, Italy and Austria).

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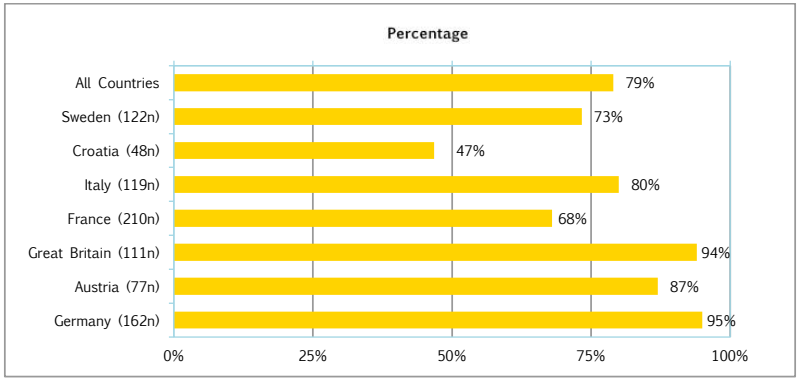
III. Women's presence in the industry

3.1 Does gender inequality exist?

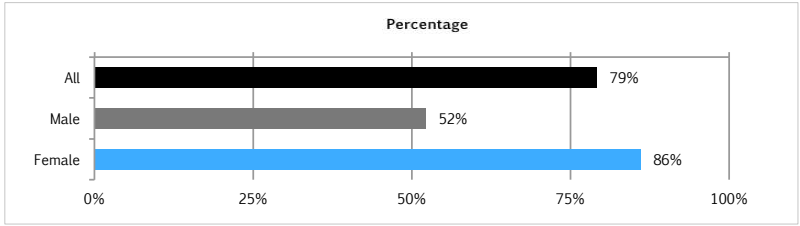
Most respondents believe that there is gender inequality in the industry. The highest incidence of inequality is perceived in Germany, the UK and Austria and the lowest in Croatia.

Figure 6a: Does gender inequality exist for directors in your national industry? By country, all respondents.



Source: EWA report database - Questionnaire
Note: n = number of respondents

Figure 6b: Does gender inequality exist for directors in your national industry? By gender



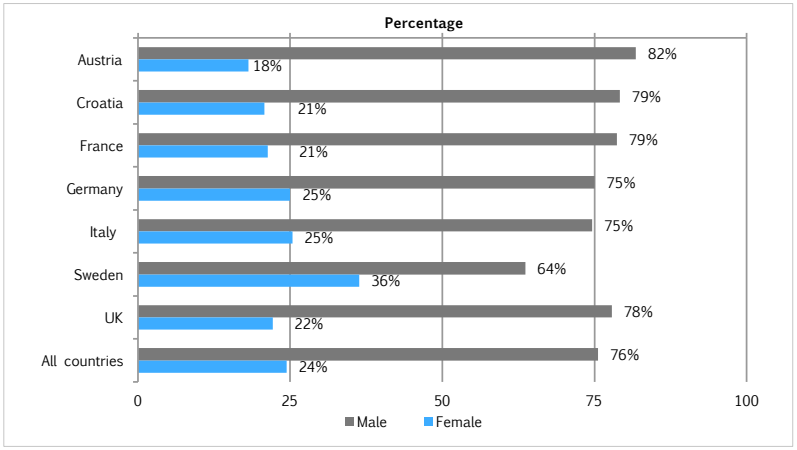
Source: EWA report database – Questionnaire

Overall, fewer men than women recognise gender inequality, but significantly over half of male respondents do acknowledge it. Taking the strongest value, "applies fully", 75-76% of the Austrian and German female respondents believe there is inequality, and even in France, where a consensus on universal equality sometimes persists, 73% of the female respondents affirmed that there is inequality.

3.2 Share of female directors active in the industry

The table below shows that the share of female directors ranges between 18.2% in Austria and 36.4% in Sweden. Sweden's figure stands out and affects EWA's European average, which at 24.4% is high in relation to four of the other countries.

Figure 7: Share of female directors (2012-2013)



Source: EWA report database - Survey
Note: Numbers for Austria, Croatia, Germany, Sweden and the UK are based on directors' guilds. The Italian figure, based on the Collecting Society register, also includes screenwriters. The figures for France (2008-12) are based on directors benefiting from the national film fund during the stated period.

It is difficult to find reliable figures to quantify the presence of female directors in the industry and the sources vary. Some countries calculate from the database of films released over the period, others refer to those listed in the directors' guilds, which include television and may include commercials, general programming and/or

those who have stopped being professionally active in the industry. On the other hand, counting those funded by national film funds may exclude many of those working in television.

Whatever the exact figures, it can be assumed that the presence of women is substantially higher than the number of women directors represented by the films which have been commissioned and released in the period covered by this report.

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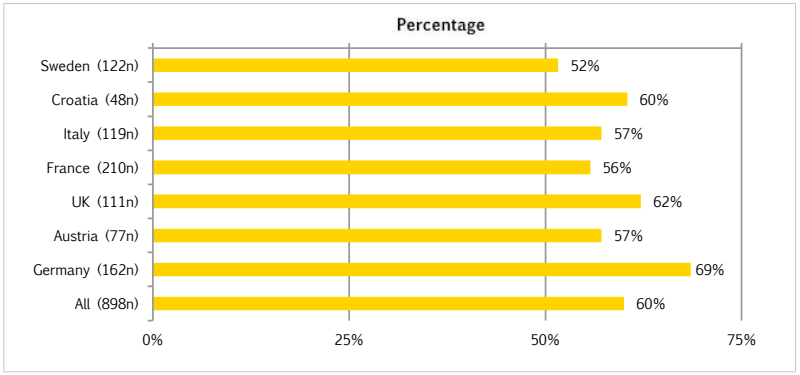
IV. Entry into the industry

Of the 898 respondents to the questionnaire, 537 (about 60%) identified themselves as directors. These respondents were asked to answer questions relevant only to directors.

4.1 How did you gain your skills?

Respondents to the questionnaire were asked to identify their roles in the industry and the chart below shows the percentage of directors by country. Both those who had been to film school and those who had not were then asked to respond to a series of questions about the way they had developed their skills.

Figure 8: Are you a director? Percentage of directors by country responding to questionnaire



Source: EWA report database - Questionnaire
Note: n = number of respondents

In all countries over half of the respondents to the questionnaire are directors. Only in Germany does the proportion rise above two thirds to 69%. Sweden has the lowest number of respondents who are directors (52%).

Of those respondents who were directors, most decided to be directors in their early twenties, with the average age being 22. Very few (12%) had decided to be directors at a young age, and only very few had made their first film before the age of eleven (9%). This finding is similar for all countries.

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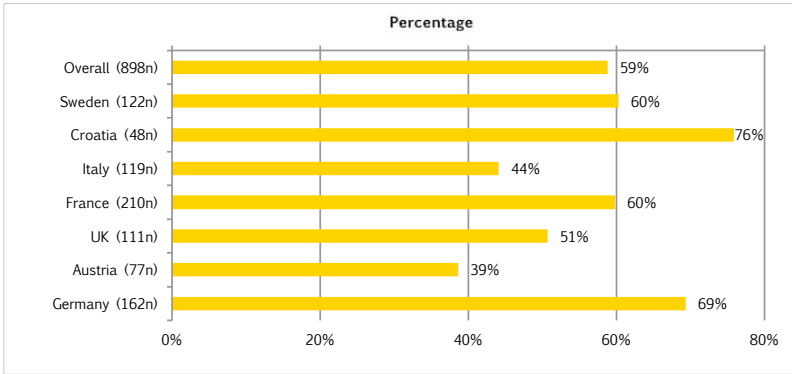
In Croatia, France, Germany and Sweden respondents who went to film school comprise 60% and over with the highest number in Croatia. In Austria, (39%) and Italy (44%) the proportion is significantly lower.

Asked what other inputs were significant, directors who went to film school also considered learning by doing important. This was markedly strongest amongst UK respondents (74%), with over half in Sweden (61%) and Austria (53%) also considering this significant. Internships were particularly important in Sweden (63%), Austria (59%) and Italy (50%), and in Italy half of the directors indicated that they had benefited from additional training courses.

Figure 9a: Did you gain your skills as a director at film school?



Source: EWA report database – Questionnaire
Note: n = number of respondents

For those directors who did not attend film school, how they learned their skills differs from country to country. The importance of learning by doing (self-taught) gets by far the highest scores. In Italy and the UK, significant numbers attend training courses (47% and 35% respectively). In Croatia, Austria and Italy directors also rated internships as important (57%, 48% and 42% respectively). In France there is the lowest rating for either training courses or apprenticeship as a way to gain skills.

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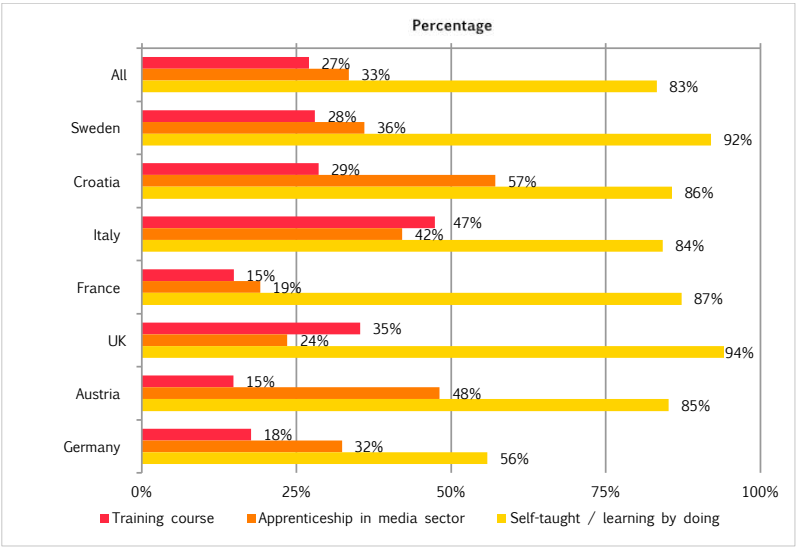
Figure 9b: If not from film school, how did you learn your skills?



Source: EWA report database – Questionnaire
Note: on the basis of 221 respondents

4.2 Routes into the industry

Most respondents consider attending a film school, directing shorts and directing documentaries to be the best routes into directing for women.

Results vary from country to country but directing documentaries is noted as important in all countries except Germany and Austria. Directing a television drama is most important in the UK and directing short films is important in all countries except Germany and Austria.

Some nations consider acting an important route into directing. This is especially true for France (75%), where a number of prominent actresses have also become directors, and it was also true for over half the respondents in Sweden (53%) and Italy (52%). Fewer women view commercials or music videos as a significant point of entry.

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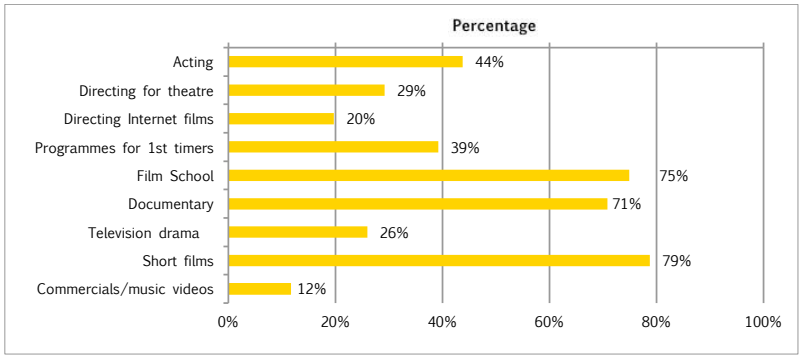
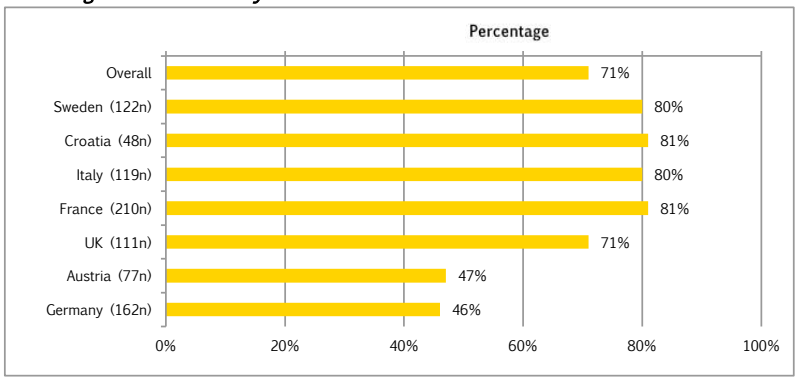
Figure 10: What is the most important entry point for women into directing?



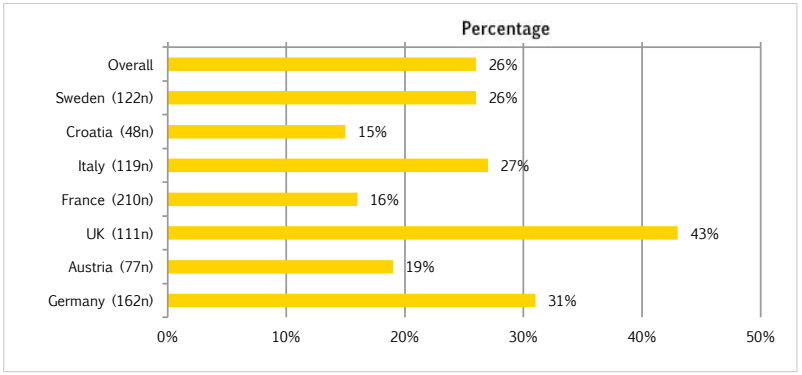
Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

Figure 11a: What is the most important entry point for women into directing? Documentary films.



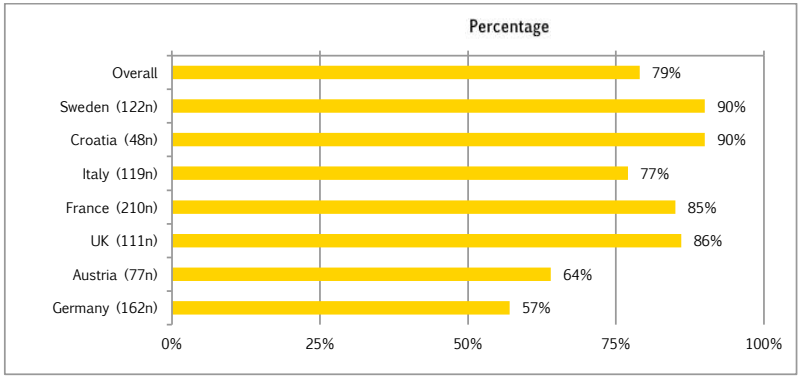
Source: EWA report database – Questionnaire
Note: n = number of respondents

Figure 11b: What is the most important entry point for women into directing? Television drama.



Source: EWA report database – Questionnaire
Note: n = number of respondents

Figure 11c: What is the most important entry point for women into directing? Short films.



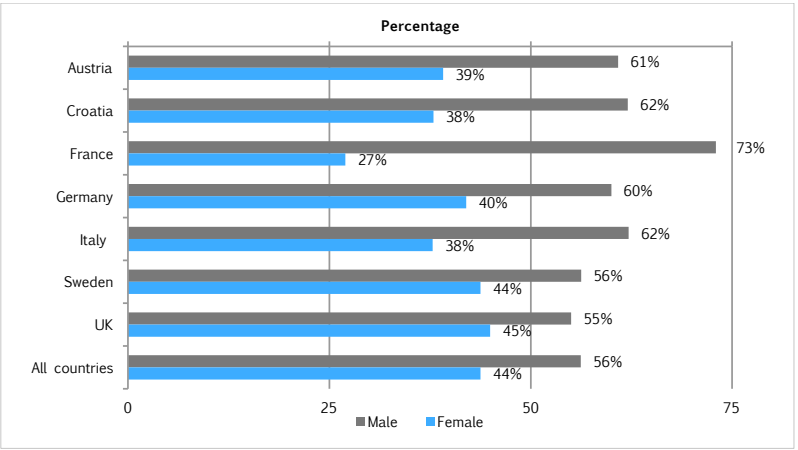
Source: EWA report database – Questionnaire
Note: n = number of respondents

4.3 Comparative performance at film school

Figures were gathered from the principal schools in seven countries; Austria, Vienna Film Academy; Croatia, Academy of Dramatic Art, Zagreb; France, *la Fémis*; Italy, *Centro Sperimentale di Cinematografia*, Rome; Germany, *Film Universität* Potsdam Babelsberg and *Hochschule für Fernsehen und Film*, HFF-Munich; Sweden, SADA and Valand schools; UK, National Film and Television School.

From those countries which could provide applicant numbers, with the exception of Italy, it is evident that the percentage of all applicants interested in directing is between 29–32% and is in absolute terms far higher than the places available for either men and women.

Figure 12: Share of female directors graduating from film school (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for France are for 2006-2014; for Italy 2008-2013; for Sweden 2009-2012; for Austria and Croatia 2010-2013 and for Germany 2010 only.
2. Figures for France relate to general degree course at *La Fémis*.

EWA's European average for female directors graduating from the principal national films schools stands at about 44%. In Austria and the UK the average percentage share of female graduates is more than double that of the percentage of female directors listed as active in the industry. In Croatia, Germany and Italy the

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differential is slightly less but still considerable. Only in France and Sweden is the drop-off less significant, at 6% and 4% respectively.

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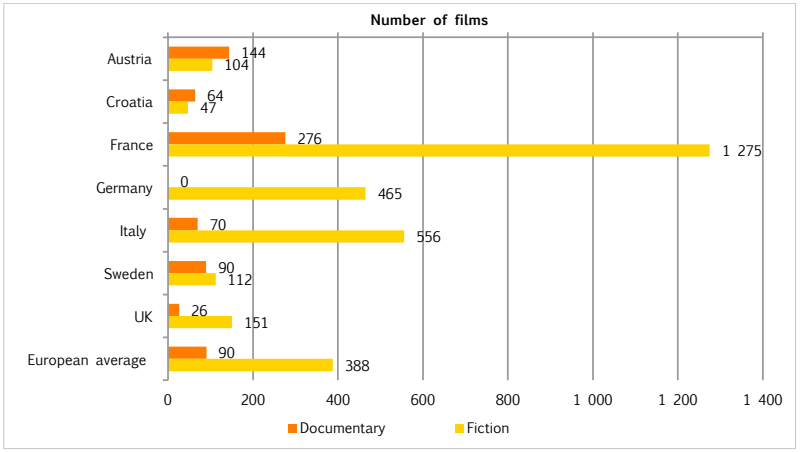
V. National funding

This report focuses on funding managed by the national film institutes, and investment from the public and private broadcasting sector. In both cases it concerns investment in fiction and documentaries of 60 minutes and over. This section contains the results for the national funds and Section 6 contains the results for the broadcasting sector.

5.1 Number of films supported by principal state fund 2006-13: by genre

France supports by far the highest number of fiction films and almost 50% more documentaries than the next highest producer, Austria. The proportion of fiction to documentary films receiving state funds is highly variable in the different countries. Austria is the only country where the production of documentaries exceeds that of fiction (by 27%), in Sweden there is a more equal balance between the genres, and in Italy just under one in eight productions funded (about 12.5%) is a documentary.

Figure 13: Number of nationally funded film productions: by genre 2006-2013



Source: EWA report database - Survey

Notes:

1. Figures for Austria and Germany are for 2009-2013; for Croatia 2008-2013
2. Figures for Germany relate to fiction films only
3. Figures for Italy, Sweden and Croatia based on year of grant decision; for Austria and the UK on year of first instalment; for France on year of production; for Germany on year of release
4. Genre breakdowns for France and Italy are estimates
5. Croatia, Sweden and the UK include only films or co-productions fully or majority funded by national funds. France, Germany, Italy and Austria also include minority co-productions
6. UK relates to BFI Lottery-funded films only.

5.2 Gender share of productions supported by principal state funds, 2006-13

The proportion of national productions by female directors ranges from 11.4% in Croatia to 33.6% in Sweden. In all the participating countries with the exception of Austria and Sweden, the share of female directors falls below EWA's European average for active female directors in 2012/13 (24.4%).

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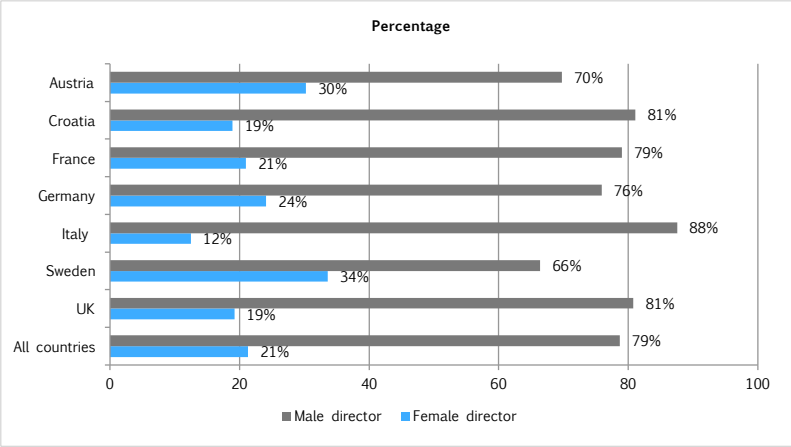
Figure 14: Gender share of productions supported by national film fund 2006-20013



Source: EWA report database - Survey

Notes:

1. Figures for Austria and Germany are for 2009-2013; for Croatia 2008-2013; and for France 2008-2012
2. Figures for Italy, Sweden and Croatia based on year of grant decision; for Austria and the UK on year of first instalment; for France on year of production; for Germany on year of release
3. Figures for Germany relate to fiction films only

In Italy statistics distinguish between awards given to 1st and 2nd time directors (*Opere Prime e Seconde* - OPS) and awards given to 3rd time + directors (*Interesse Culturale* - IC). The average share for OPS productions was higher than the Italian norm for both fiction films and documentaries, whereas the average share for IC was lower than the Italian norm in both cases. This reflects in part a policy focus on incentivising new directors.

5.3 Share of national film funding

In the majority of countries, the average share of national production funding awarded to women falls well below the percentage share of active female directors (an average of 24.4%), the exceptions being Austria and Sweden. Overall, the share of funding awarded to female directors ranges from 11%–28% of overall funding. In

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Italy the share is lowest and in Sweden the highest. Croatia, Italy and the UK fall below EWA's European average.

In Sweden female directors have the highest share of funding both for fiction films and documentaries, whilst in Italy and the UK the share awarded to female directors falls below average in both categories.

EWA's European average share for women directors is higher in relation to documentaries (23.8%) than it is for fiction films (16.1%), where the gender imbalance is particularly marked. However, although female directors' success in gaining funds for documentaries is stronger than for fiction films in all countries, since these awards tend to involve smaller amounts they represent a lower percentage of the overall funding provided.

In Italy figures are kept which track funding in relation to the length of experience of directors. In relation to both fiction films and documentaries for female directors, they reveal a significant decline in the share of national funding from first-time to second-time directors (OPS) and third-time + directors (IC). For fiction the respective shares amount to 16.25% (OPS) and 8.1% (IC), and for documentaries there is a decline from 13.7% (OPS) to 5.6% (IC).

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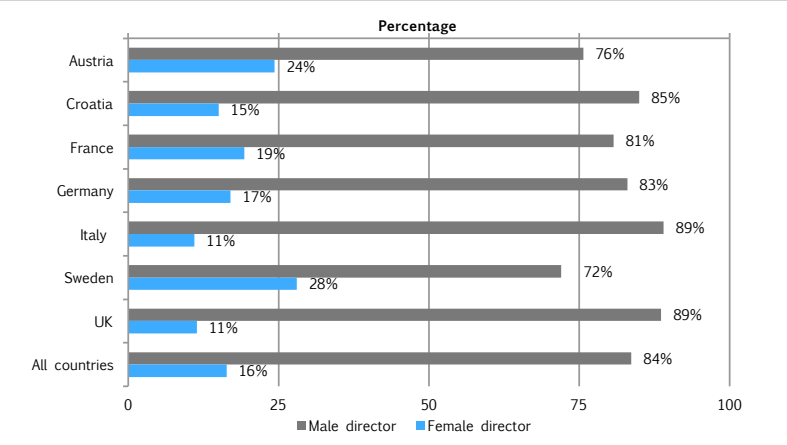
Figure 15: Gender share of funding by national film fund (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for Croatia are for 2008-2013; and for Austria and Germany 2009-2013
2. Figures for Germany relate to fiction films only
3. Figures for Italy, Sweden and Croatia based on year of grant decision; for Austria and the UK on year of first instalment; for France on year of production; for Germany on year of release
4. Croatia, Sweden and the UK include only films or co-productions fully or majority funded by national funds. France, Germany, Italy and Austria also include minority co-productions

In relation to fiction films, the gender share ranges from 10.9% in Italy to 27.1% in Sweden. Apart from Sweden, Austria's percentage share is the most proportionate. Women's share is particularly low in Italy (10.4%) and the UK (11.3%) in relation to EWA's European average, which is 16.1%.

In Italy figures are kept which track funding in relation to the length of experience of directors. In relation to both fiction films and documentaries for female directors, they reveal a significant decline in the share of national funding from first-time to second-time directors (OPS) and third-time + directors (IC). For fiction the respective shares amount to 16.25% (OPS) and 8.1% (IC), and for documentaries there is a decline from 13.7% (OPS) to 5.6% (IC).

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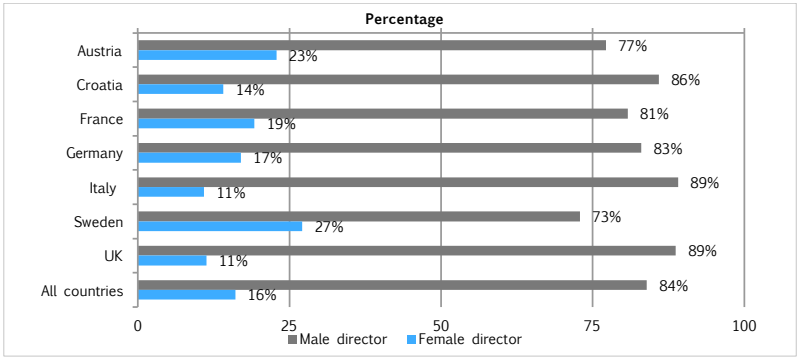
Figure 16: Share of national film funding for fiction (2006-2013)

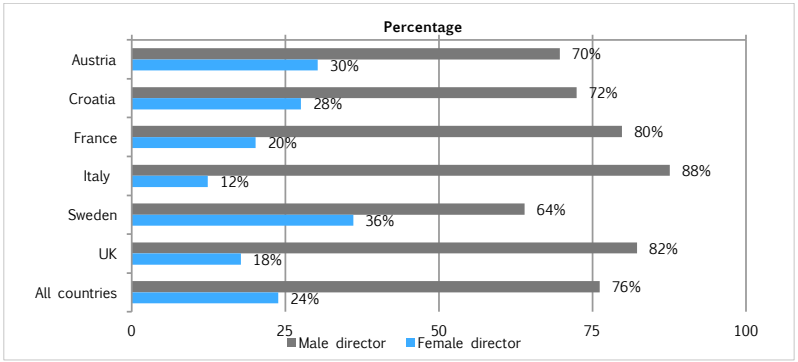


Source: EWA report database - Survey

Notes:

1. Figures for Croatia are for 2008-2013; and for Austria and Germany 2009-2013
2. Figures for Italy, Sweden and Croatia based on year of grant decision; for Austria and UK on year of first instalment; for France on year of production; for Germany on year of release.
3. Croatia, Sweden and the UK include only films or co-productions fully or majority funded by national funds. France, Germany, Italy and Austria also include minority co-productions.

Figure 17: Share of national film funding for documentaries (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for Croatia are for 2008-2013; and for Austria 2009-2013
2. There are no figures for documentary films for Germany
3. Croatia, Sweden & UK include only films or co-productions fully or majority funded by national funds. France, Germany, Italy and Austria also include minority co-productions

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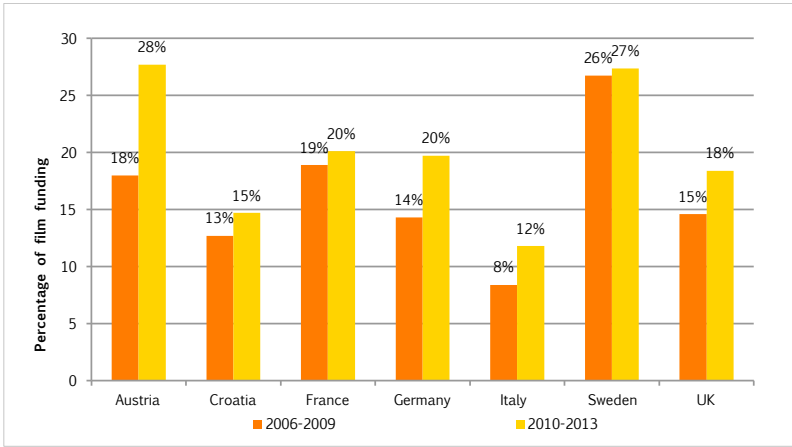
Female directors of documentary films fare best in Austria and Sweden, the two countries where the number of documentaries produced relative to fiction is also highest. The percentage share ranges from 12.4% in Italy to 36.1% in Sweden. The funding share in Italy (12.4%), the UK (17.8%) and France (20.2%) falls below EWA's European average of 23.8%.

5.4 Progression of female directors' share of national funding

Women's share of national funding for fiction films has increased over the two 4-year periods in all countries, although only in Austria and Sweden does it rise above 25%, whereas in all other countries the share remains below 20% for the full period (France is just over at 20.1%). Austria and Germany have seen the highest percentage change. In spite of a small increase of 3.4%, Italy's investment remains well below average and has been subject to fluctuations throughout the period.

Figure 18: Progression of female directors' share of film funding: fiction (2006-2013)



Source: EWA report database - Survey

Note:

1. Figures for Croatia are for 2008-2010 and 2011-2013; for Austria and Germany they are for 2009-2011 and 2011-2013, with figures for 2011 divided equally between the two periods.
2. UK data relates to BFI Lottery-funded films only.

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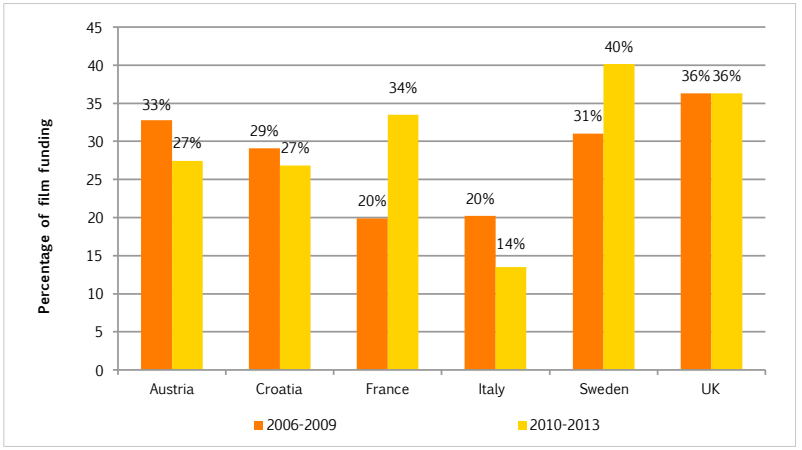
The national trend for female directors in relation to documentaries is more varied than for fiction. Women's share of national budgets has increased in France and Sweden, remained the same in UK and decreased in Austria, Croatia and Italy. The highest percentage change is in France, with a 13.6% share increase for the second period. Only in Italy does the share remain well below 20% at 13.5%.

Figure 19: Progression of female directors' share of film funding: documentaries (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for Croatia are for 2008-2010 and 2011-2013; and for Austria they are for 2009-2011 and 2011-2013, with figures for 2011 divided equally between the two periods.
2. There are no figures for documentary films for Germany.
3. UK relates to BFI Lottery-funded films only.

5.5 Average national fund spend per film according to gender

For fiction films during the period under review, the average spend per film from the national fund is lower in all countries for female directors than for men. The differential ranges from 6% in Croatia to 34% in Germany. Even where the differential is smallest, it should be noted that female directors still account for a far smaller proportion of overall national funding for fiction, averaging at 16.1%. In relation to the scale of the industries, the Swedish and Austrian input seems high in

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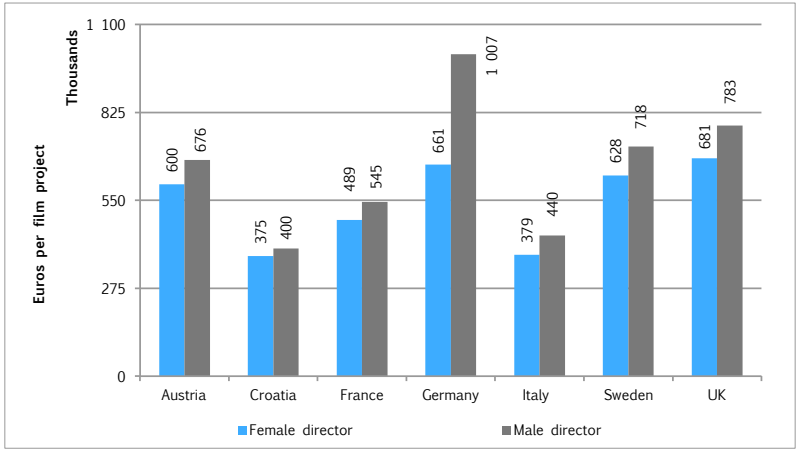
comparison to that of France and Italy both for male- and female-directed projects. Overall, the figures involved vary widely. For female-directed fiction, the lowest average spend (375,238 euros in Croatia) is just over 55% of the highest average spend (681,318 euros in the UK). This is comparable to the lowest average spend for male-directed fiction (399,767 euros in Croatia), which is about 51% of the highest average spend (783,200 euros in the UK). However, these figures are not necessarily indicative of the size of the final production budget.

Figure 20: Average national fund spend per film by gender: fiction (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for Croatia are for 2008-2013; and for Austria and Germany 2009-2013
2. UK relates to BFI Lottery-funded films only.

For documentaries over the period, the spend per female-directed film from the national film funds is lower than for male-directed films in Austria, France and Sweden. The differentials are much more varied than in fiction, with female directors faring marginally better in Croatia, Italy and the UK, and male directors in Austria, France and Sweden. The largest differential (€31,000, or 13%) is found in the UK, and it is in favour of female directors.

It should be noted that overall budgets for documentaries are considerably smaller than those for fiction films, so for instance, in Croatia the female share of documentary funds still only amounts to just over a quarter of the total funds

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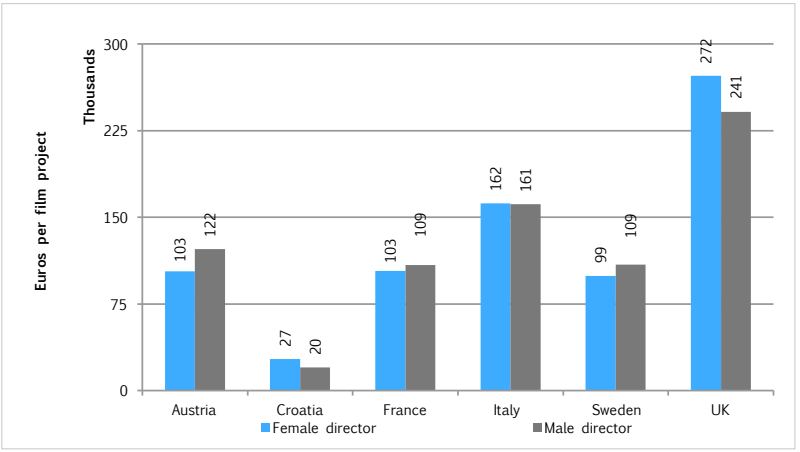
available. In Italy, although the spend per documentary is slightly higher for female than for male directors, the number of documentaries produced over the period is very low and only about 8% of the number of fiction films.

Figure 21: Average national fund spend per film by gender: documentaries (2006-2013)



Source: EWA report database – Survey

Notes:

1. Figures for Croatia are for 2008-2013; and for Austria 2009-2013.
2. There are no figures for documentary films for Germany.
3. UK relates to BFI Lottery-funded films only.

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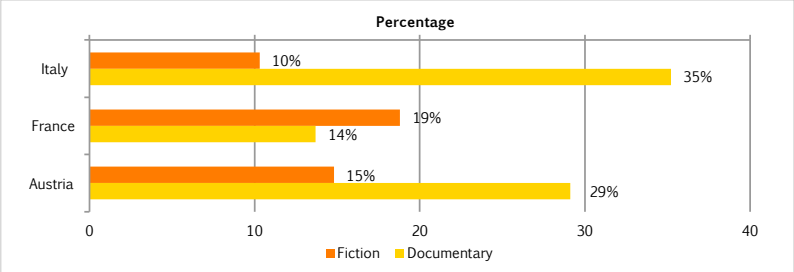
VI. Investment by broadcasters

In spite of the importance of public service broadcasting in sustaining women's careers, only three countries were able to provide statistics with gender and genre breakdown – for Austria, ORF; for France (Arte, France Télévisions 0,2,3,4) and for Italy (RAI). These were for feature length films, whether fiction or factual. In Sweden statistics from SVT were only available for fiction and relate to the number of films produced rather than actual funding amounts. Where data was accessible some of it had to be especially prepared for this report, and in the case of the remaining three countries, Croatia, Germany and the UK, coherent statistics were not available.

Since private broadcasting companies also have a growing input in productions they were also included in data research for this report. However, only two countries were able to access gender-based statistics for the private sector (France and Sweden). Their data is included in this section.

6.1 Female directors' share of public service broadcasting investment

Figure 22: Female directors' share of public broadcaster funding by genre (2006-2013)



Source: EWA report database - Survey

Notes:

1. For productions 60 minutes and over
2. For Austria figures are only for those productions with a cinema release

The overall share of investment in female-directed productions for the three countries with available figures is: Italy 11.4%; Austria 17.6%; France 18.6%. The share for female-directed documentaries in Austria and Italy is significantly larger

than the corresponding share for fiction films, attaining 35.2% in Italy. The share for fiction never exceeds 18.8% (France) and is much lower in Italy (10.3%).

In comparison with female directors' share of funding from national film funds, their share of public broadcaster funding is lower in all cases for fiction films. For documentaries, however, female directors' share of public broadcaster funding is significantly higher for Italy (35.2% as opposed to 12.4%) and France (13.7% as opposed to 20.2%) but lower by about 3 percentage points for Austria.

Figures provided by Sweden for SVT show that on average 23 fiction films are produced each year, of which female directors have on average a 22.4% share.

6.2 Female directors' share of private sector broadcasting investment

Only two countries were able to provide a gender breakdown of data on production investment from private sector broadcasting (France and Sweden). This indicates that this form of investment is significant, although without full data on other income such as private equity, distributors and producers' own funds it is not possible to be more specific about the percentage share of such investment in overall budgets. Funding levels for France appear to be three times the figure invested for support from national film funds, although this is based on aggregate figures from 15 channels and may be subject to variation (13EME RUE, CANAL J, CANAL+, CINE+, DIRECT 8, GULLI, M6, NRJ12, NT1, ORANGE TV, TF1, TMC, TPS, TV5, W9). In Sweden investment in film production by the single broadcaster TV4 AB ran at around a quarter (25%) of national funding between 2006 and 2013 (no figures were available for 2012).

The data indicates that private broadcasters' investment in female directors is lower than that for male directors although the figures are not comparable between the countries: for France figures are for share of investment and for Sweden they are for share of productions. In Sweden female directors' overall *share of fiction productions* funded by the private broadcaster was 25.6% over the full period as compared to about 30% with regard to nationally funded productions.

In France female directors' *share of private broadcaster investment* in fiction films was 15.3% and in documentaries 13.3%, as opposed to a share of 19.2% and 20.2% from the national fund for fiction films and documentaries respectively.

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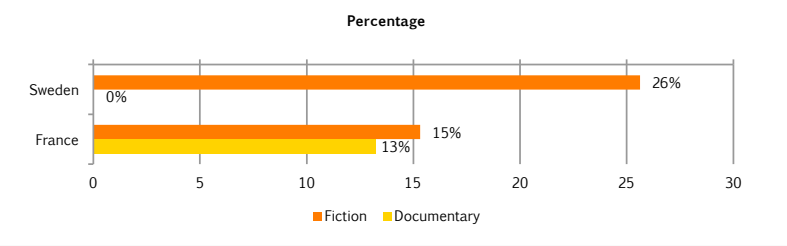
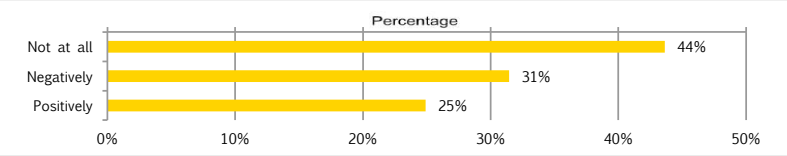
Figure 23: Female share of investment by private broadcasters: France and Sweden (2006-2013)



Source: EWA report database - Survey
Notes:
1. For productions 60' and over
2. Figures for Sweden are for 2006-2011 and 2013, and relate to number of fiction productions; there are no figures for documentaries.
3. Figures for France relate to funding amounts.

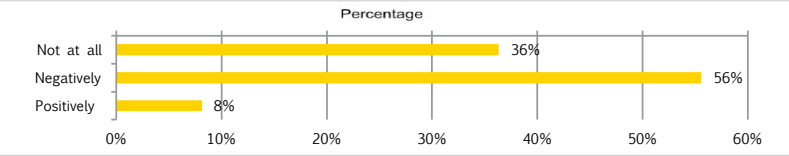
6.3 Does gender affect funders' investment decisions?

Figure 24a: How does a female director affect public funding decisions?



Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

Figure 24b: How does a female director affect private funding decisions?

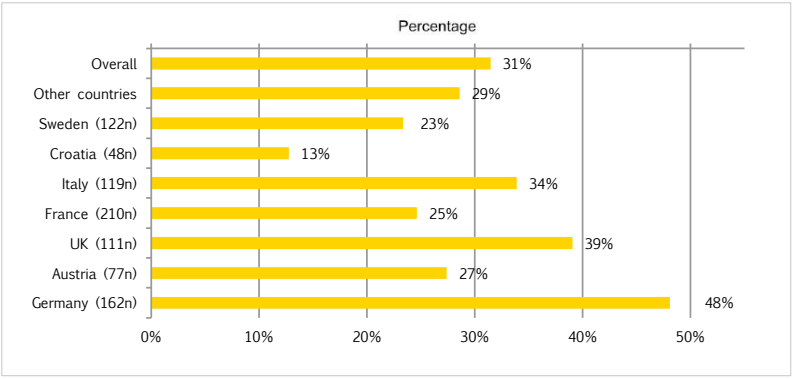


Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

In this question respondents were asked whether they thought gender affected funders' decisions first in the public and then in the private sector. Overall, more than half the respondents believe that a female director influences the funding of a film project negatively. This is especially true for private funds, but even for public sector funding 31% think that a female director has a negative influence. These negative effects are perceived most strongly in Germany, the UK and Sweden.

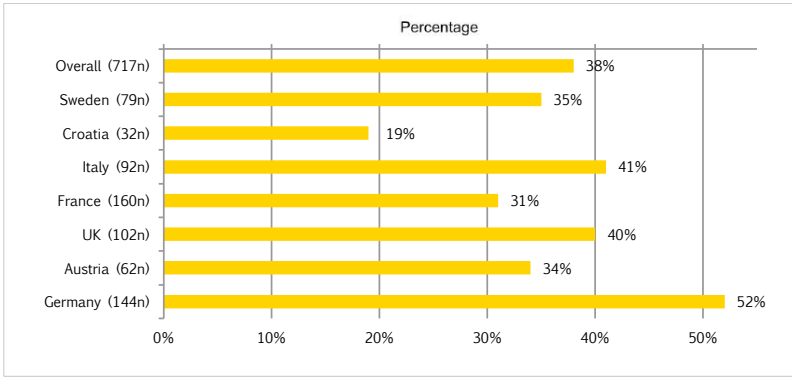
In all countries the percentage of female respondents who believe that gender impacts negatively on funding decisions in the public sector exceeds the percentage when both male and female respondents are taken into consideration. This is most evident in Sweden and Austria.

Figure 25a: How does a female director affect public funding decisions? Negatively. By country



Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

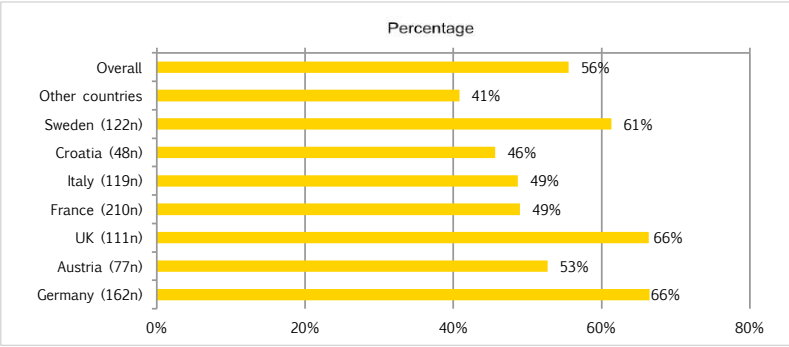
Figure 25b: How does a female director affect public funding decisions? Negatively. By country, women only



Source: EWA report database – Questionnaire
Note: n = number of women who responded

In all countries the percentage of female respondents who believe that gender impacts negatively on funding decisions in the private sector exceeds the percentage when both male and female respondents are taken into consideration. This is most evident in Sweden and Austria.

Figure 26a: How does a female director affect private funding decisions? Negatively. By country.



Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

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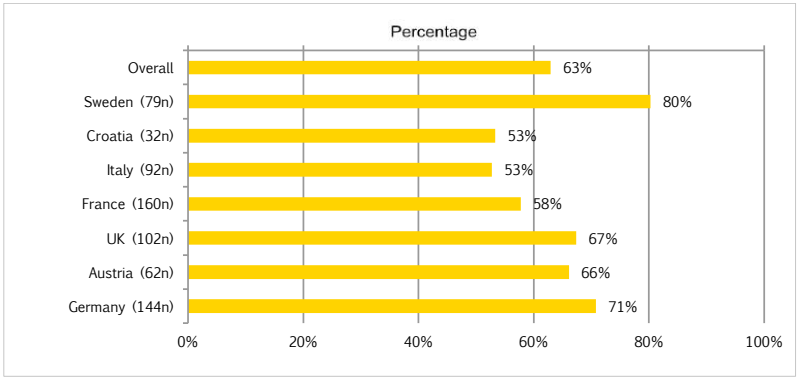
Figure 26b: How does a female director affect private funding decisions? Negatively. By country, women only.



Source: EWA report database – Questionnaire
Note: n = number of women who responded

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VII. The challenges faced by female directors

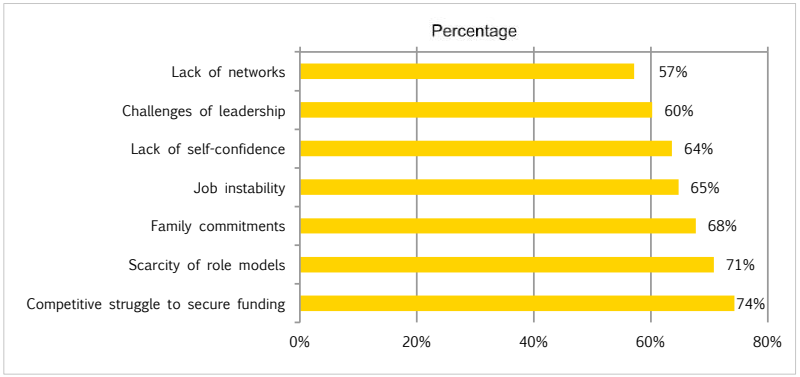
7.1 What factors discourage women?

The most important reason given for the low numbers of directors is the *competitive struggle for funding* (74%). This becomes even more significant if we look only at the female answers, where the percentage rises to 81% (Fig 27b). The next most important reason given is another "hard" factor, the *scarcity of role models* (71%), which increases in importance amongst women only.

From the additional comments given regarding the *competitive struggle for funding* this factor has two aspects, economic and creative, both of which impact negatively on female directors. The first concerns competition in a male dominated, risk-averse market. The second concerns a commissioning bias, unfavourable to women, for "white, male-driven, narratives".

Family commitments and job instability are discouraging to a lesser extent, from 65 to 71%. "Soft factors", such as the challenge of leadership, lack of self-confidence and absence of networks, are perceived as relatively less important.

Figure 27a: What factors discourage female directors? All respondents

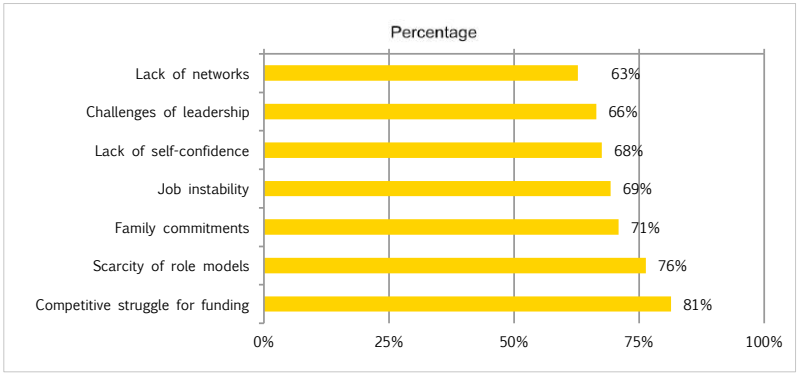


Source: EWA report database - Questionnaire
Note: on the basis of 898 respondents

Responses vary strongly from country to country. Austrian and German women, for instance, are more concerned about the challenge of leadership. French, Croatian

and Italian women worry more about job stability and family commitments. British and Swedish respondents see the struggle for funding as the core problem.

Figure 27b: What factors discourage female directors? Women respondents only



Source: EWA report database – Questionnaire
Note: on the basis of 717 women respondents

7.2 What is the impact of being a parent?

Overall 44% of the directors are parents; this varies from country to country. In Sweden two thirds (65%) of the respondents are parents, while in Germany only one third (29%) are parents. The percentage of parents is higher in Sweden, France and Croatia, while Germany, Italy, Austria and the UK have the lowest share of parents.

For most respondents having a child does not affect their work negatively. Almost three out of four (73%) stated that it did not apply. In those countries which consider parenting a greater issue for directors – Austria, Sweden and the UK – it still only concerns less than 40% of respondents. In Croatia and Germany it hardly applies.

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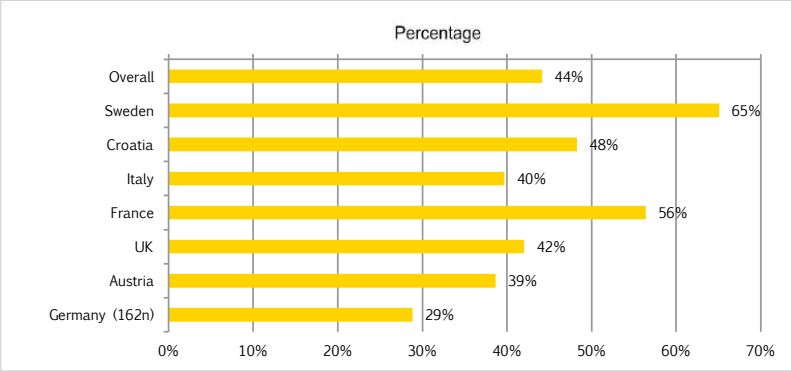
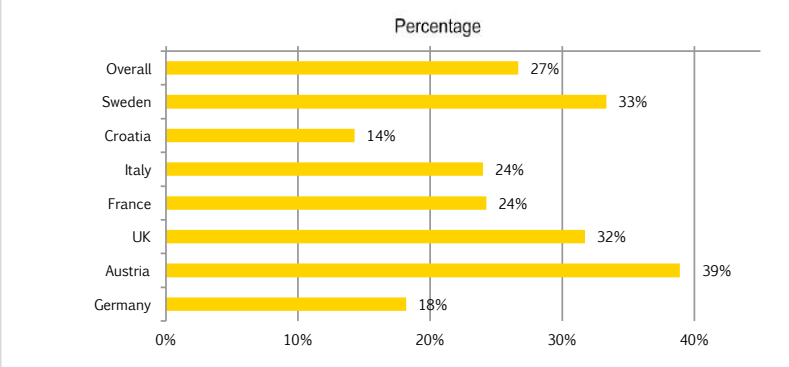
Figure 28a: Are you a parent? Yes – directors only.



Source: EWA report database - Questionnaire

Figure 28b: Has being a parent discouraged you from directing? Applies fully/ applies. By country



Source: EWA report database - Questionnaire

There is an overall difference of 10% between male and female respondents on the issue of parenting. More male directors are parents (57% of men vs. 44% of women) but female directors with children reveal themselves to be more discouraged than their male counterparts, with the exception of those in Italy. Comparatively, parenting is not seen as a strongly discouraging factor. However, in the open responses there was considerable criticism of an industry culture which does little to

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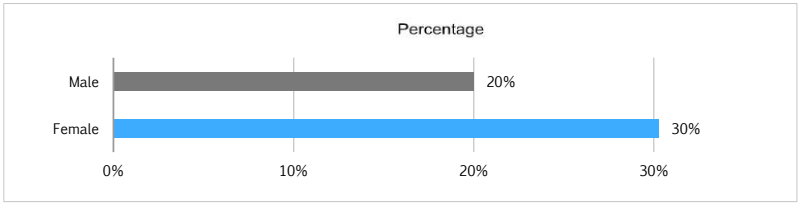
support or acknowledge parents' needs, particularly in budget schedules and especially during production periods.

Figure 28c: Has being a parent discouraged you from directing? Applies fully/ applies. By gender



Source: EWA report database – Questionnaire

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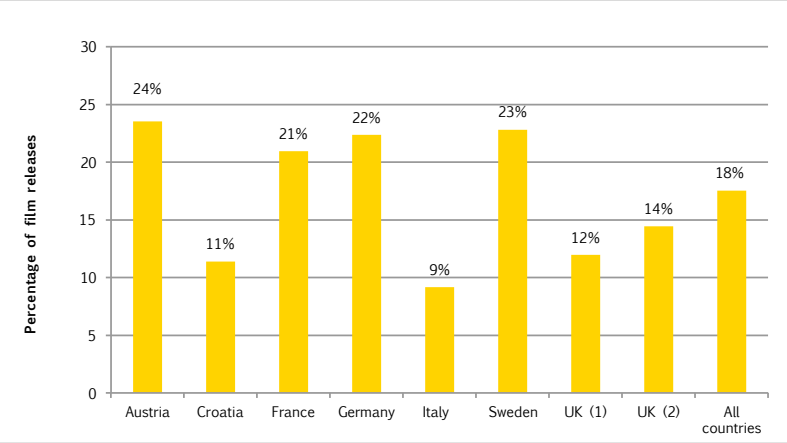
VIII. Releases

8.1 Share of female releases with female directors

Overall, female directors' share of national cinema releases ranges from 9.2% in Italy to 23.5% in Austria. EWA's European average for national releases is 17.6%, slightly higher than the European Audiovisual Observatory's average of 16.3% for films by female directors released in Europe between 2003 and 2012.[2] . Whilst the percentage share for Croatia, Italy and the UK falls below both benchmarks, the share of releases for the other four countries, Austria, France, Germany and Sweden, is higher than both EWA and the European Audiovisual Observatory averages but still less than one in four of all releases.

Figure 29: Overall share of film releases with female directors by country, 2006-2013



Source: EWA report database - Survey

Notes:

1. Figures for Croatia relate to 2008-2013; and for Germany to 2009-2013.
2. Figures for Germany relate to fiction films only
3. UK(1) relates to all films with independent funding; UK(2) to films with BFI Lottery funding

[2] *Female Directors in European Films, European Audiovisual Observatory, 2014*

Given the continued importance of cinema release both for critical reception and in reaching the audience, the low share of film releases for female directors has significant consequences. However, it should be noted that tracking cinema releases is only one part of an increasingly complex picture, given changing business models for distribution. In the UK, for instance, between 2009 and 2013 only 48% of films with budgets over £500,000 got a theatrical release,[3] the rest finding audiences in other ways such as video, festivals or internet release. From another perspective, in Sweden 36 of the 68 films funded by private broadcaster TV4 AB were given direct release on television or on DVD rather than in the cinema.

8.2 Share of film releases with female directors by genre, 2006-2013

In all countries studied, female directors' share of documentary releases over the period is higher than their share of fiction releases, with an average overall differential of about 7%. This differential is highest for Austria and Sweden, about 18% and 11% respectively. Given lower budgets for documentaries, this is perhaps indicative of the higher presence of female directors in low budget production. It also corresponds to EWA's finding that documentary filmmaking is seen as an important entry point for women into the industry.

The average share of female directors among fiction releases is particularly low. Even the highest share, for Germany at 22.4%, falls below the average percentage of female directors active in the industry in 2012/3. The lowest share, in Croatia at 7.5%, is well below average.

[3] *BFI Statistical Yearbook, 2013*

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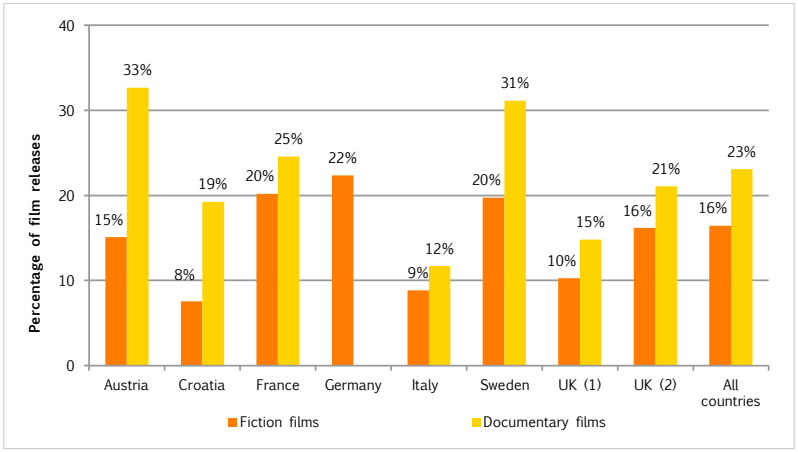
Figure 30: Share of film releases with female directors by genre, 2006-2013



Source: EWA report database - Survey

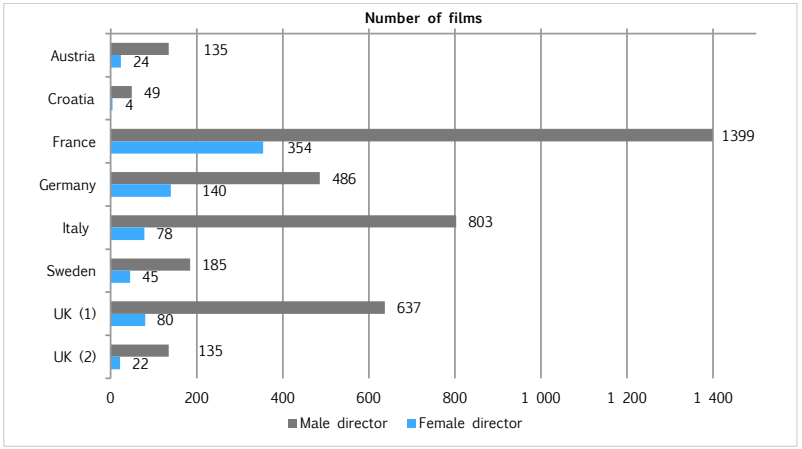
Notes:

1. Figures for Croatia relate to 2008-2013; for Germany to 2009-2013
2. No figures have been provided for documentary films in Germany
3. UK(1) relates to all films with independent funding; UK(2) just to films with BFI Lottery funding

8.3 Number of fiction film releases and progression over the period

The number of fiction film releases with female directors is disproportionately low even in France, the largest industry, where the figure represents about a quarter of the number of male-directed films released. In Austria, Croatia, Italy and the UK, female directors' share of film releases is disproportionately low. The poor visibility of female-directed films informs concerns evidenced in the questionnaire about distribution strategy and the consensus that increasing the number of female-directed films in circulation is critical to changing the profile of women directors.

Figure 31a: Number of fiction film releases, 2006 – 2013: by country and gender



Source: EWA report database – Survey

Notes:

1. Figures for Croatia relate to 2008-2013; for Germany to 2009-2013
2. UK(1) relates to all films with independent funding; UK(2) relates to films with BFI Lottery funding

There is a positive trend in five of the seven countries across the two four-year periods, with an increase of 3.4% in the EWA European average. This is lower than the growth in most of the individual countries and reflects the weight of the exceptions, Sweden and the UK. In the UK the decline is most marked in the UK's releases for films from the BFI lottery-funded sector. Only the share of female-directed fiction film releases in France and Germany comes close to the share of active female directors in these countries.

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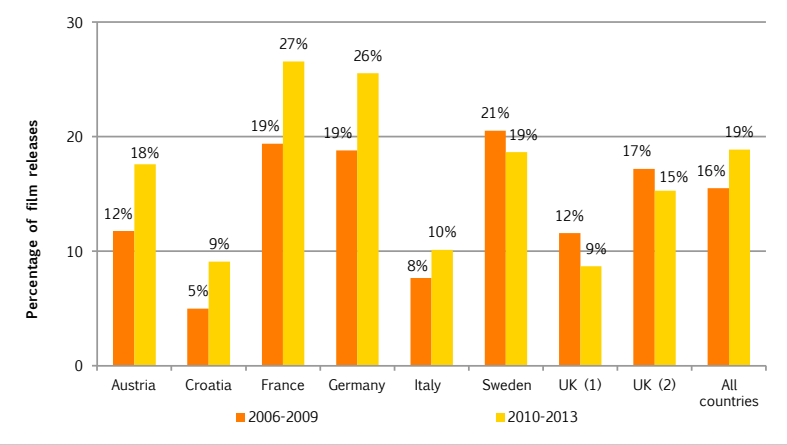
Figure 31b: Progression chart for women's share of fiction film releases (2006-2013)



Source: EWA report database - Survey

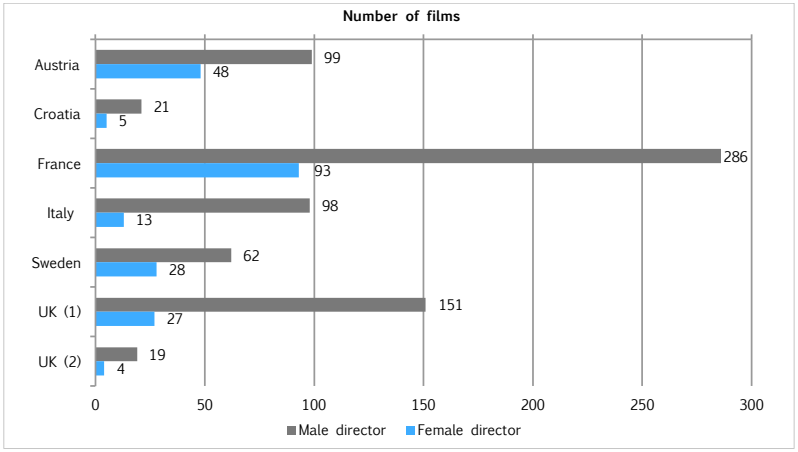
Notes:

1. The two periods used for the Croatian figures are 2008-2010 and 2011-2013; and the two periods for Germany are 2009-2011 (first half) and 2011 (second half)-2013, with the overall numbers for 2011 divided equally to provide 'first half' and 'second half' figures.
2. UK(1) relates to all films with independent funding; UK(2) relates to films with BFI Lottery funding

8.4 Number of documentary film releases and progression over the period

In Austria and Croatia the numbers of female-directed documentary releases exceed those for fiction. The female share of documentary releases is also highest in Austria at 50%. The share is lowest in Italy at 13.28%, with the exception of releases from the UK's BFI Lottery-funded productions. The figures for the number of female-directed documentary releases are also exceptionally low in relation to EWA's European average for the number of nationally funded documentaries over the period, which is 90. This is perhaps indicative of alternative distribution outlets, especially since figures for some countries such as Austria only include cinema releases.

Figure 32: Number of documentary film releases, 2006-2013



Source: EWA report database - Survey

Notes:

1. Figures for Croatia relate to 2008-2013
2. UK(1) relates to all films with independent funding; UK(2) relates to films with BFI Lottery funding
3. No data were provided for documentary films in Germany

There has been an increase in the share of releases for female-directed documentaries for most countries, although it is less marked than with regard to fiction, perhaps because for fiction the starting point was already higher. Austria's share has remained more or less the same. Croatia's steep decline reflects the small production base which accentuates annual variables. Figures for the second period in most countries, excepting Croatia, Italy and UK Lottery-funded productions, show a proportion of female directors more in line with the percentage of female directors active in the industry, whilst in Austria and Sweden we see where women's potential can lead.

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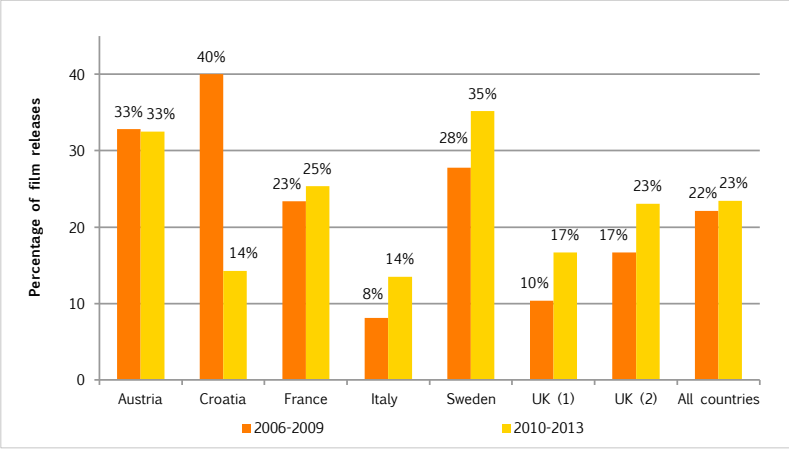
Figure 33: Progression chart for documentary releases (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for Croatia relate to 2008-2010 and 2011-2013
2. UK(1) relates to all films with independent funding; UK(2) relates to films with BFI Lottery Funding
3. No data were provided for documentary films in Germany

8.5 What is the perceived share of film releases in Europe for female directors?

Most respondents to the questionnaire estimate correctly that female-directed films comprise less than 20% both of national releases and of all European films released in their countries. There was slightly more confidence in the number of female-directed films on national screens coming from Europe, with almost a third (32%) estimating that these would have a 20-30% share.

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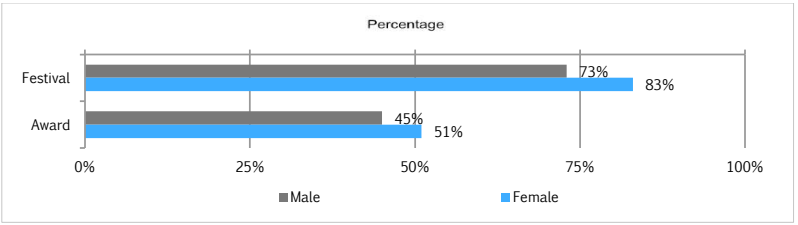
IX. Awards and critical reception

EWA analysed films released in 2013 from the seven countries, coding the films according to gender of director, the number of national and international awards associated with the film and the number of festival participations. There were 668 films in total, of which 595 were fiction and 93 documentaries. 28 of these were directed by teams rather than a single director and were excluded from the analysis, which is therefore based on a total of 660 films.

9.1 Overall festival participation and film awards, 2013

More films made by women are shown at festivals (either national or international) in proportion to the overall number of productions. This means that of all films made by women 83% (4 out of 5) are shown at national or international festivals, while only 73% of the films made by men are shown at festivals. Overall, of all films made by women about half (51%), are either nominated for or win awards. In comparison, only 45% of films directed by men achieve this target.

Figure 34a: Overall gender share of festival participation and film awards, 2013



Source: EWA report database – Festival and Awards

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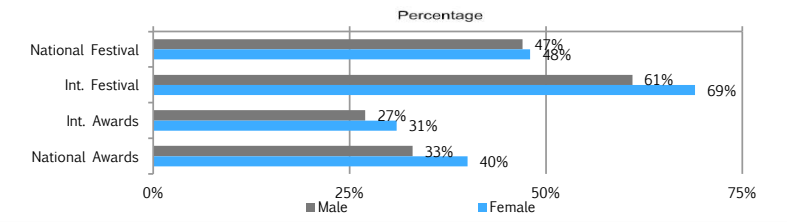
Figure 34b: Gender share of festival participation and awards: national and international

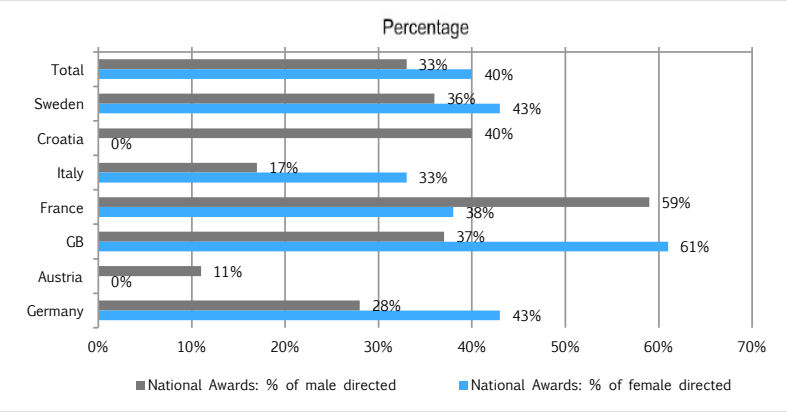


Source: EWA report database – Festival and Awards

9.2 National share of festivals and awards, 2013

For the following three charts, no data on festivals was received from the UK; no data on national festivals was received from Austria and only one female-directed film fell into the Croatian sample, which was therefore extended to 2010-2013.

Figure 35a: National awards for all films released in 2013: gender & country

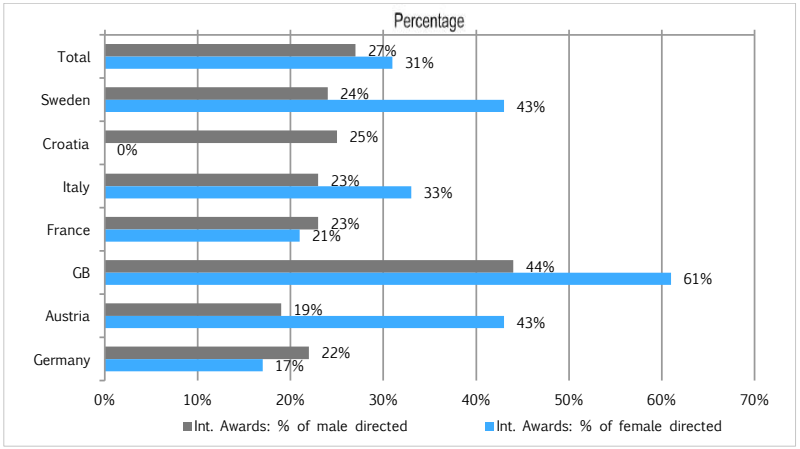


Source: EWA report database – Festivals & Awards
Notes:

1. No data on festivals from the UK
2. No data on national festivals for Austria
3. Croatian sample extended to 2010-13

In Sweden, Germany, Austria, the UK and Italy a film with a female director is more likely than one with a male director to win awards and get invitations to participate in film festivals. More than two thirds are screened at festivals and over half receive awards. Thus, with the exception of France, films with female directors get more international recognition than those directed by men. Croatia is a total exception, since there is only one film made by a woman in 2013. Results also show that films by female directors win proportionately more international awards and are shown at international festivals with more success than those by male directors. France is the exception as films with male directors win slightly more awards and are shown at more festivals.

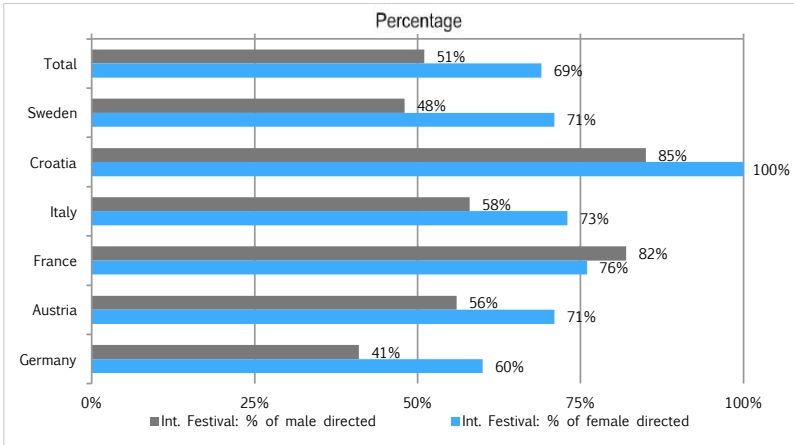
Figure 35b: International awards for all films released in 2013: gender and country



Source: EWA report database – Festivals and Awards
Notes:

1. No data on festivals from the UK
2. No data on national festivals for Austria
3. Croatian sample extended to 2010-13

Figure 35c: International festival participation in 2013: by gender & country



Source: EWA report database – Festivals & Awards
Notes:

1. No data on festivals from the UK
2. No data on national festivals for Austria
3. Croatian sample extended to 2010-13

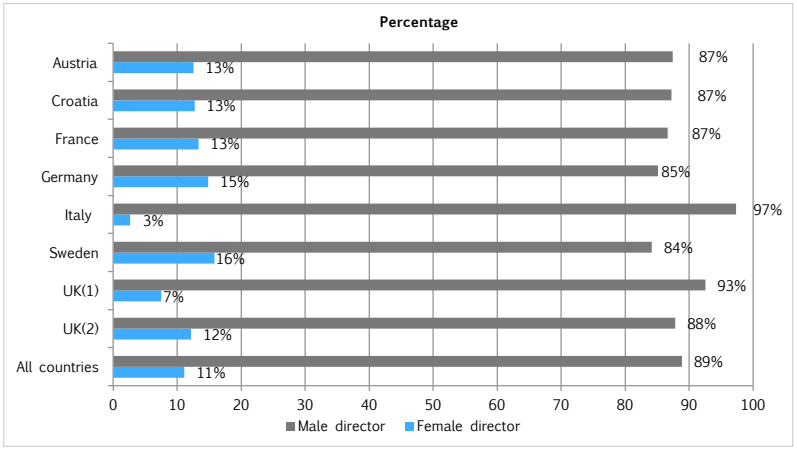
X. Admissions

10.1 Share of box-office admissions for female directors: all films

These statistics are based on all national films released in the seven countries regardless of whether or not they have been supported by national funds.

Whereas the overall average share of admissions for female directors in the European Audiovisual Observatory Report (2014) was 9.7%, with the exception of Italy and the UK all countries in EWA's survey achieve a higher performance.[4] EWA's European average is 11%. Sweden's share is highest (15.8%) and Italy's share the lowest (2.7%).

Figure 36: Share of box-office admissions for all films (2006-2013)



Source: EWA report database - Survey
Notes:

1. Figures for Croatia relate to 2008-2013; for Germany to 2009-2013
2. Figures for Germany based on fiction only
3. UK(1) relates to all films with independent funding; UK(2) relates to films with BFI Lottery Funding

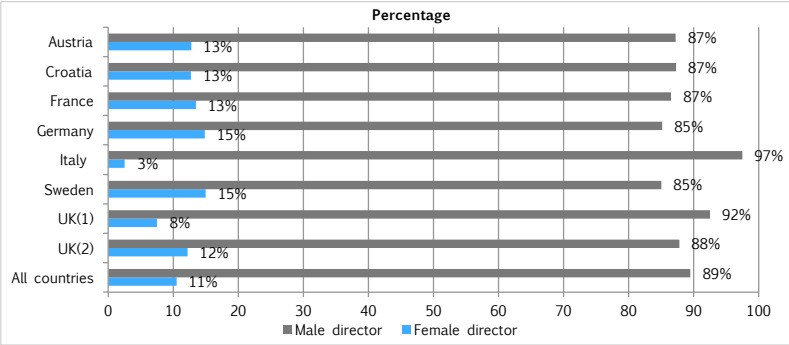
[4] *Female Directors in European Films: 2003-2012, European Audiovisual Observatory, 2014*

Far more contextualisation is needed to understand how gender affects admissions. This has been beyond the scope of this report. Factors would include genre, lead actors, distribution strategy and number of release screens. Since many female-directed films have smaller budgets and attract less funding, they are seen as having less commercial potential and released with a smaller number of prints, all of which impacts on their potential to reach an audience, thus compounding entrenched assumptions that male-directed films necessarily perform better at the box office, a myth which this report challenges.

10.2 Share of box-office admissions for fiction films, 2006-13

With one exception, the percentage share of admissions in each country is lower than the percentage share of releases, so proportionately films have reached a smaller audience over the period. However, Croatia is the exception since the average share of admissions for fiction films (12.7%) is over a third higher than the percentage share of releases, indicating that these films are reaching larger audiences than might be expected. For Italy, where the female-directed share of releases is 9%, and for the UK, where the female-directed share is 12% (all independents) and 14.4% (BFI Lottery-funded) the admissions share is especially low.

Figure 37: Share of box-office admissions for fiction films, 2006-2013



Source: EWA report database - Survey

Notes:

1. Figures for Croatia relate to 2008-2013; for Germany to 2009-2013
2. Figures for Germany are based on fiction only
3. UK(1) relates to all films with independent funding; UK(2) relates to films with BFI Lottery Funding

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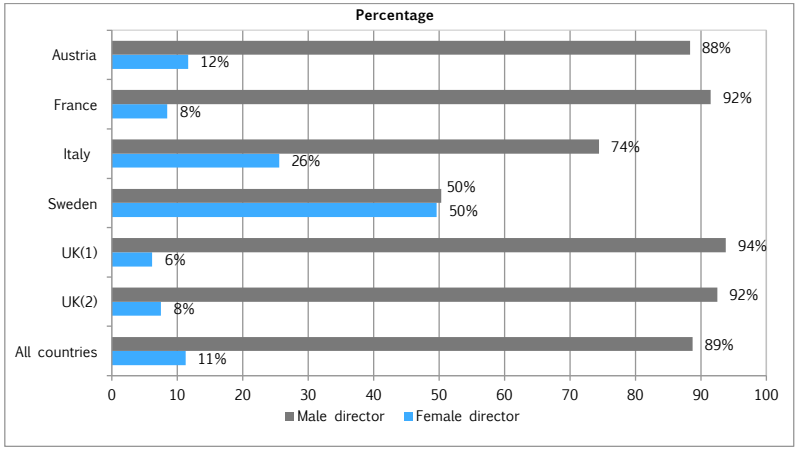
10.3 Share of box-office admissions for documentary, 2006-13

In Italy and Sweden the average share of admissions, about 50% and 26% respectively, is almost twice as high as the share of releases, indicating that female-directed documentaries are reaching a bigger audience in relation to male films. However, for Italy this share represents a fairly low number of actual admissions – 1.4 million admissions to documentaries as against 233 million for fiction films. In France the share of admissions for female-directed documentaries seems surprisingly small compared to the 25% share of releases they achieve. For the UK the share of admissions is low in relation to the percentage share of releases.

Figure 38: Share of box-office admissions for documentaries, 2006-2013



Source: EWA report database - Survey

Notes:

1. No data were provided for documentary films in Germany
2. UK(1) relates to all films with independent funding; UK(2) relates to films with BFI Lottery Funding

10.4 Progression of box-office admissions: all films

In Austria, Sweden and the UK over the two four-year periods there has been an increase in the share of admissions for female-directed films. The overall share of the audience, however, is disproportionately low, never above 20%, ranging between 2.6% in Italy and 19.2% in Sweden. To understand the reasons for this it would be necessary to look at various additional factors in relation to each release, such as

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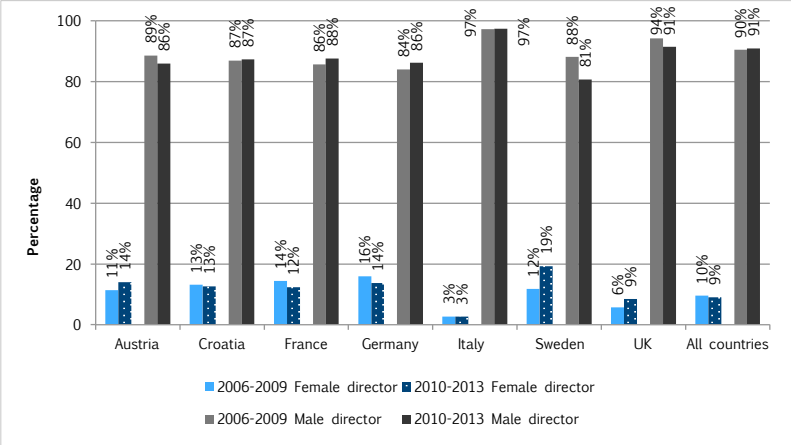
production value, genre, number of release screens etc. This has been beyond the scope of this report. However, it is significant that in the questionnaire, many respondents indicate that publicity, advertising and distribution strategy need far more support in order to achieve the best route to the market.

Figure 39: Progression of box-office admissions: all films (2006-2013)



Source: EWA report database - Survey

Notes:

1. Figures for Croatia are for 2008-2010 and 2011-2013; for Germany they are for 2009-2011 and 2011-2013, with figures for 2011 divided equally between the two periods.
2. Figures for Croatia and Germany are for admissions to fiction films only.

10.5 Progression of admissions for fiction films

The share of admissions for female-directed films has been growing for fiction films in five of the seven countries, particularly in Sweden and the UK. However, admissions remain below a 20% share in all countries, with the lowest share of admissions registering in Italy (2.4%) and the highest in France and Germany, at just under 20%. The EWA European average has decreased slightly by half a percent to 11.6% in 2010-13. Figures for admissions should be read in relation to the number of releases over the period, which is far lower for female-directed films. They should also be interpreted in the context of other factors affecting distribution strategy which were outside the scope of this report.

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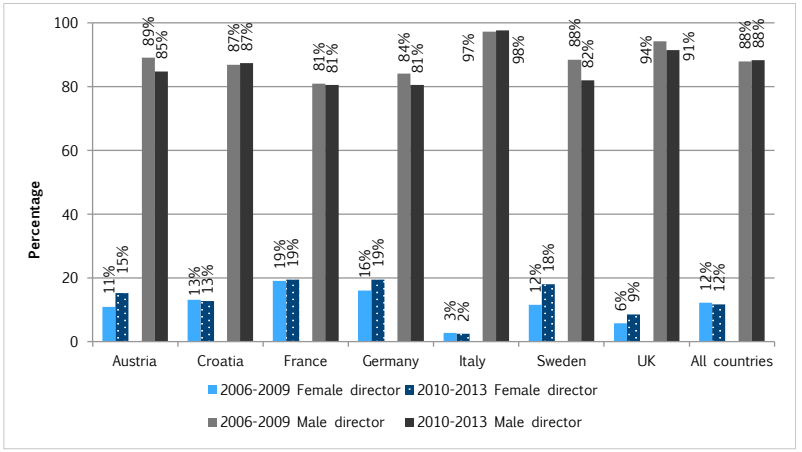
Whilst the four-year progression charts for admissions help to lessen the impact of annual variations in numbers, results are still affected by distortions created by one-off successes.

Figure 40: Progression of admissions for fiction films (2006-2013)



Source: EWA report database - Survey

Note: Figures for Croatia are for 2008-2010 and 2011-2013; for Germany they are for 2009-2011 and 2011-2013, with figures for 2011 divided equally between the two periods.

10.6 Progression of admissions for documentary films

The share of admissions for female-directed documentary films has grown significantly in three of the five countries which provided data, with an increase of 19.3 percentage points in the EWA European average. In 2010-2013 the average was 30.6%. In Sweden and Italy the average share of admissions for female-directed documentaries is higher than the average percentage share of releases, at 52.8% and 29.5% respectively, indicating that female-directed documentaries have reached larger cinema audiences than male-directed documentaries in the last four year period. However, the number of documentaries released in Italy is very low. The share for Austria and France, at 9.5% in 2010-13, is particularly low given the percentage share of releases for documentaries of 33% and 25% respectively.

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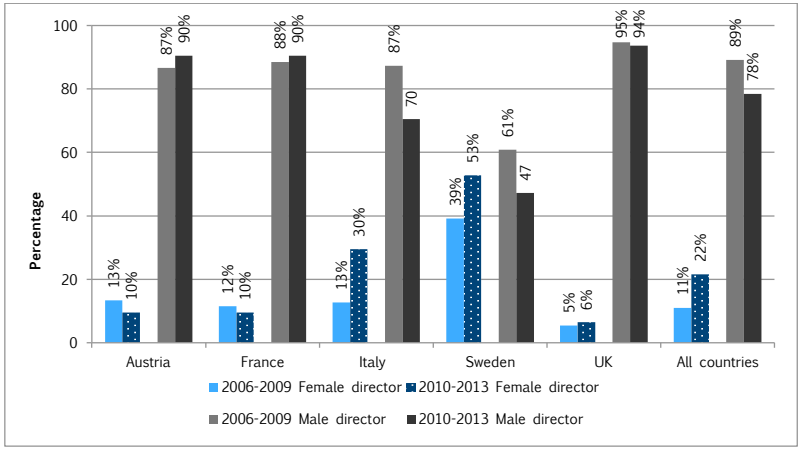
Figure 41: Progression of admissions for documentary films (2006-2013)



Source: EWA report database - Survey

10.7 Average admissions per film

The EWA European average share of admissions per film has decreased for fiction films but has increased slightly for documentaries. In the period 2010-13, admissions per film for female-directed fiction have increased in Croatia, Sweden and the UK. In Sweden this increase is substantial, about 44,000. In Italy and Sweden admissions per film for female-directed documentaries have also increased with Italy increasing audience size by over 17,500 and Sweden doubling the size of admissions in comparison to male directed fiction.

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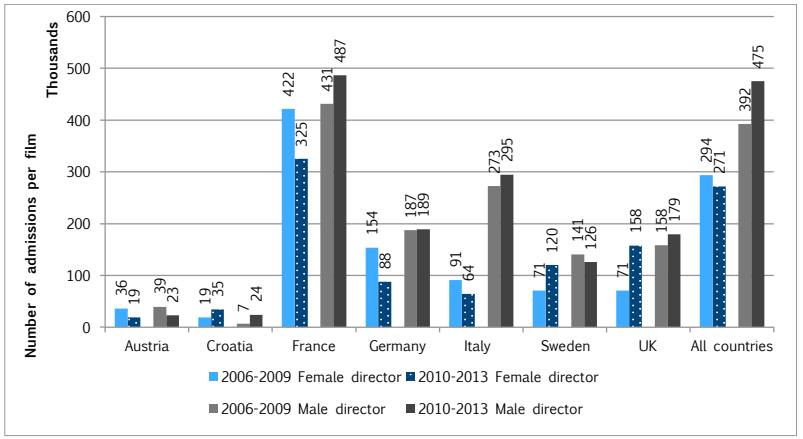
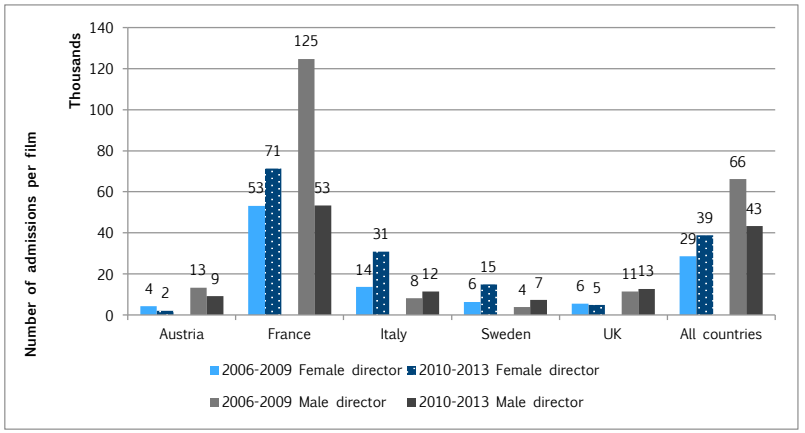
Figure 42a: Progression of average admissions per film: fiction (2006-2013)



Source: EWA report database - Survey
Note: Figures for Croatia are for 2008-2010 and 2011-2013; for Germany they are for 2009-2011 and 2011-2013, with figures for 2011 divided equally between the two periods

Figure 42b: Progression of average admissions per film: documentaries (2006-2013)



Source: EWA report database – Survey

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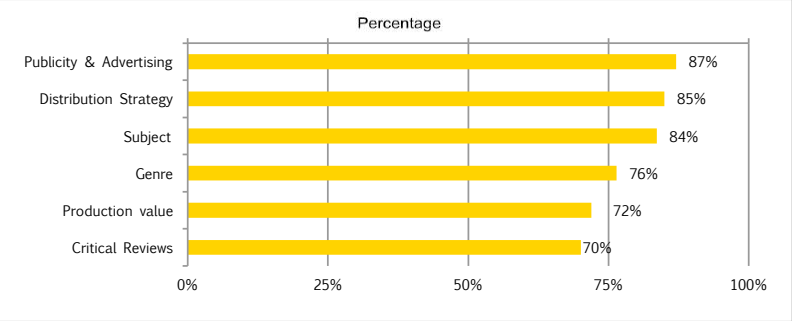
In some countries the average number of admissions per female-directed film is higher than for films directed by men. For fiction, this was the case in 2009 and 2010 in Austria, in 2010 in Germany and in the 4-year period 2010-13 for UK lottery-funded films. For documentaries this was the case for Italy and Sweden and in 2006 for Austria.

10.8 What affects box-office performance?

In all countries it was felt that publicity, advertising and distribution strategy were the most important factors affecting box-office performance of female-directed films, with the subject of the film closely following. In the comments it was stressed that female-directed films need more support in finding their route to the market, not least because there are far fewer of them.

Figure 43: What affects box-office performance?



Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

10.9 How does the gender of the director affect the audience?

Few respondents think that audiences consider the gender of the director to be a significant factor in choosing a film. This was consistent in all countries. However there was widespread consensus that the gender of the director affects the treatment of the subject. Well over half of respondents thought that women's films perform better in festivals than in their own national cinema market, a response indicative of EWA's data on critical reception.

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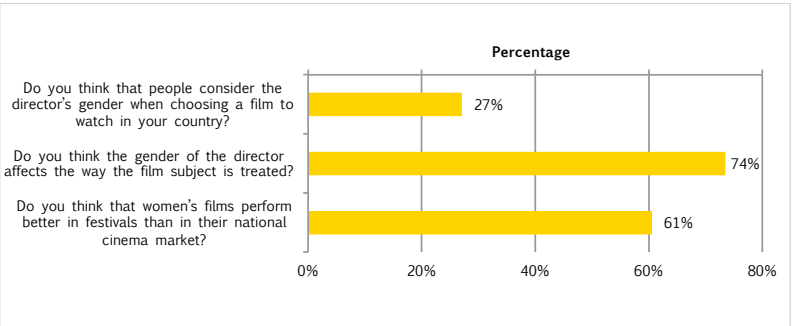
Figure 44: How does the gender of the director affect the audience?



Source: EWA report database - Questionnaire
Note: on the basis of 898 respondents

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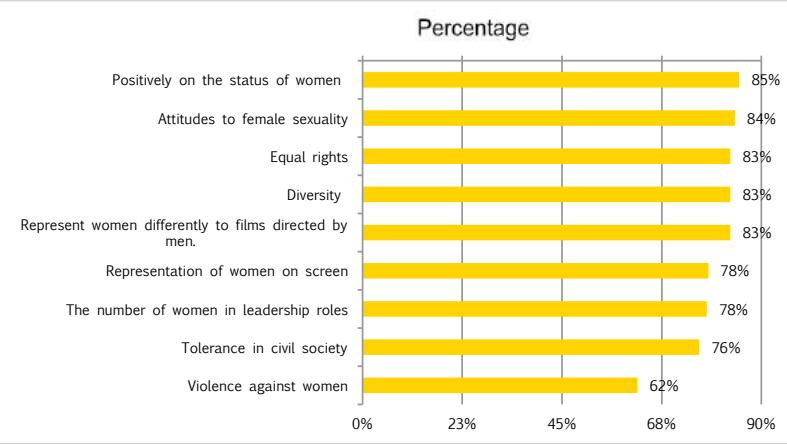
XI. The social impact of gender equality for films directed by women

Respondents were asked to consider a range of social impacts which might result from achieving greater equality in the number of films in circulation directed by women. Over three quarters of respondents felt that there would be positive change in relation to all challenges, with the exception of the issue of violence against women. It should be noted that respondents to the questionnaire are largely professionals, and mainly working in the film industry, so their opinions might differ from those of wider society.

Figure 45: How would more films by women impact on current social issues?



Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

XII. Changing the Picture – Policies for Change

12.1 Existing measures for gender equality in the industry

12.1.1 The national film institutes

Sweden is the only country with a mandatory policy including management targets and a 5-part Action Plan to achieve gender equality. The target for 2006-12 was to achieve 40% as the proportion of projects directed by a woman. For 2013-15 this increased to 50%. Participation has increased, although not to the 50% level. Women's films have appeared amongst the top 10 national films.

In **Austria**, in 2012, the Film Institute started to collect data on women directors and scriptwriters, both those applying and those being supported.[5] In 2013, gender parity was achieved on the selection committee (8+8). Since 2014 a mission statement has been adopted aiming for a 60:40 share in directing, scriptwriting and producing.

In **Croatia** the Law on Audiovisual Activities stresses that "particular care" should be taken "to preserve the Croatian language and Croatian cultural identity in the European and worldwide context" and mentions equality of genders amongst other diversity categories although there are no mandatory measures. However, since 2008 there has been a shift in national funding strategy towards gender equality.

In **France** there is no mandatory policy. In 2013 the French Minister for Culture and Communication and the Minister for Women's Rights signed a 5-point charter prepared in association with the organisation *Le Deuxième Regard*. Under the charter signatories pledge to ensure better collection of gender-based statistics, to encourage equal representation for women in decision-making bodies and to apply equal pay rights. However, to date there has been no action to monitor this and generally there is a denial of difference influenced by the universalist concept of the Republic.

In **Germany** there is no coherent policy on gender equality or best practice measures but the discussion is under way. The organisation *Pro-Quote-Regie* has successfully raised the issue in the press. There is now a petition for gender balance in funding, public broadcaster ARD has targets to achieve 30% of programming directed by female directors and a new law is under discussion to

[5] *Data for 2010 – 2014 available in Austria activity report (www.filminstitut.at)*

achieve equal representation in all national commissioning and funding committees and juries.

In **Italy** no regulation specific to the audiovisual sector is in place regarding gender equality. Gender equality, though, is taken into account in the composition of the commissioning committees and of the public agencies' board of management. The Directorate General for Cinema of the Ministry of Cultural Heritage and Activities and Tourism, as the competent authority and film fund, has started monitoring gender balance in films produced and in the films supported within the selective scheme and DG Cinema is also carrying out several studies on gender equality.

In the **UK** since 2007 the BFI's Statistical Yearbook has included some data on directors' gender, particularly in the sections on talent and directing, but there is no coherent, industry-wide policy. In July 2015, the British Film Institute launched Diversity Guidelines,[6] where the director's gender is included amongst multiple variables in a 3-tick scheme to encourage production companies applying for funding to meet targets on diversity.

None of the countries have a mandatory approach to issues of under-representation/diversity beyond gender equality. However, the Croatian Film Act acknowledges in principle various categories for diversity; the CNC in France jointly manages the "Images of Diversity" funding scheme[7] established since 2007 and in the UK Diversity Guidelines (see above) aim to provide an incentive for greater awareness.

12.1.2 Public service broadcasters

Public service broadcasters are important because women use them to sustain their careers; they often constitute an important stage in skills building for feature production although there is generally not the same creative freedom as in feature film.

In Austria, ensuring equal rights for men and women is stated as a goal of the state broadcaster ORF but there is no coherent policy in either Austria or Croatia.

In France statistics are collected and gender breakdowns are possible although there is no official policy on gender equality. Networks, however, do exist, including

[6] *http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-film-fund-diversity-guidelines-for-production-2015-05-19.pdf*
[7] *http://www.cnc.fr/web/fr/images-de-la-diversite*

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FranceTV *au Féminin,* an organisation which has pledged to monitor and lobby for greater representation.

In Germany the *Pro-Quote-Regie* movement carried out an analysis, finding that only 11% of prime time fiction content on public service broadcasters is directed by females. This has led to various discussions and a commitment to self-regulation, with a view to changing this situation within the next few years.

In Italy, RAI was the first national public service provider to comply in 2013 with the recommendations of the Council of Europe to improve the representation of women and to combat violence against women. RAI's gender policy is delivered through the RAI Charter (2010-12), with a 5-point action plan.

In Sweden, information had to be gleaned from a list of titles, indicating that information and/or statistics on directors' gender are not being collected, and that regulatory frameworks on gender equality are inadequate.

Although there is a soft commitment to diversity in programming and equality in the workforce in the UK, in the absence of regulatory frameworks to deliver statistics, industry representative body PACT is working on pan-industry data collection with both public and private broadcasters including BBC, Channel Four, ITV, Sky and possibly Channel 5. *Project Diamond*, to launch in October 2015, will collect data on gender and diversity for annual reports with the aim of encouraging self-regulation in the sector. The data will be based on obligatory diversity reports to be submitted with all independent programmes made for the channels.

12.1.3 Gender equality in relation to other forms of under-representation

Perspectives on gender equality and under-representation more generally differ according to national contexts. In the UK there has been some monitoring of representation in terms of ethnic origin, sexual orientation and disability, under the umbrella term "diversity", but comprehensive statistics do not exist for gender equality for directors to be cross-referenced according to other diversity categories. In France, by contrast, no data is permitted which might classify directors according to ethnic origin or sexual orientation. In Italy and Sweden, some diversity statistics exist for the film sector but they are not kept systematically. In Austria and Croatia diversity statistics are not kept in relation to the film industry or film directors.

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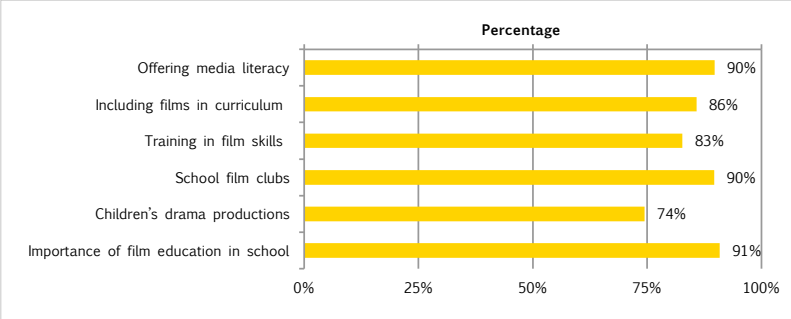
12.2 Preparing the ground in school education

Over 90% of respondents strongly recognise the need to prepare the ground for more female directors at an early age during school education. There is strong support for media literacy and the inclusion of more female-directed films in the curriculum and through school film clubs.

Figure 46: What measures would boost equality during school education?

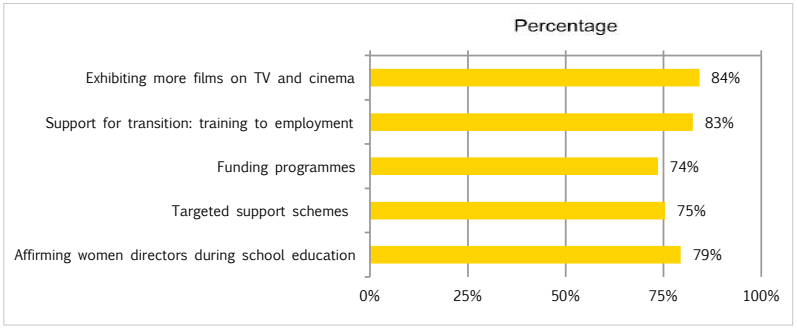


Source: EWA report database – Questionnaire
Note: on the basis of 898 respondents

12.3 Measures to encourage potential women directors

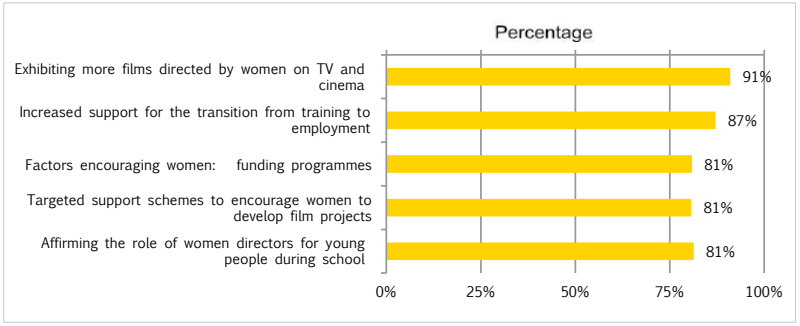
Responses were variable. In different countries different factors are given more or less importance. However, showing more films on television and in cinemas gets the highest scores in every country except for Italy. Targeted support schemes and funding programmes are also important in most countries, with the exception of France and Croatia, where affirming women directors in school education is seen as most relevant. Female respondents reflect the same views, only with higher percentages of agreement.

Figure 47a: What measures would encourage female directors to join the industry?



Source: EWA report database - Questionnaire
Note: on the basis of 898 respondents

Figure 47b: What measures would encourage female directors to join the industry? Women respondents only



Source: EWA report database – Questionnaire
Note: on the basis of 717 women respondents

12.4 Policies to sustain female directors' careers

Gender equality in the various (funding) commissions is important for almost all, and of highest importance for the female respondents (94%). Targeted (production) funding, incentives for producers to work with female directors and increased funding for first and second films are also considered important, with an 80-88%

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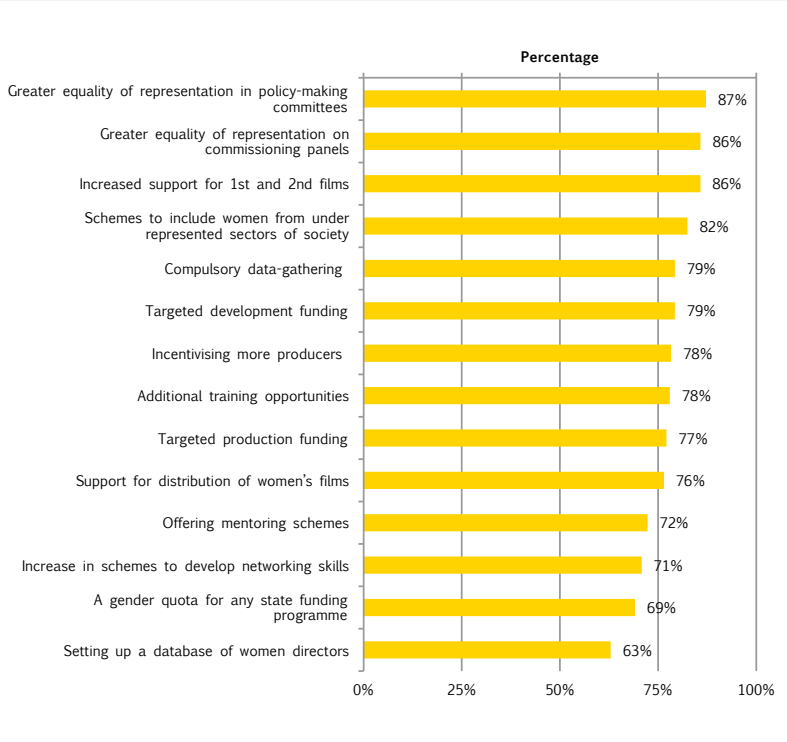
response. Women respondents especially favour increasing support for first and second films and also give higher recognition (87%) to the need to include more women from under-represented backgrounds, and to the need for increased support for distribution (84% as opposed to 77%).

Three out of four respondents (77%) believe that quotas for state funding would help to achieve change. This is given the most support by British respondents and the least support by French respondents (58%). In some countries there was also a significant difference between male and female respondents, most markedly in Austria, where the gap was between 20% and 87% for male and female respondents respectively.

Figure 48a: Policies to sustain female directors' careers: all respondents



Source: EWA report database - Questionnaire
Note: on the basis of 898 respondents

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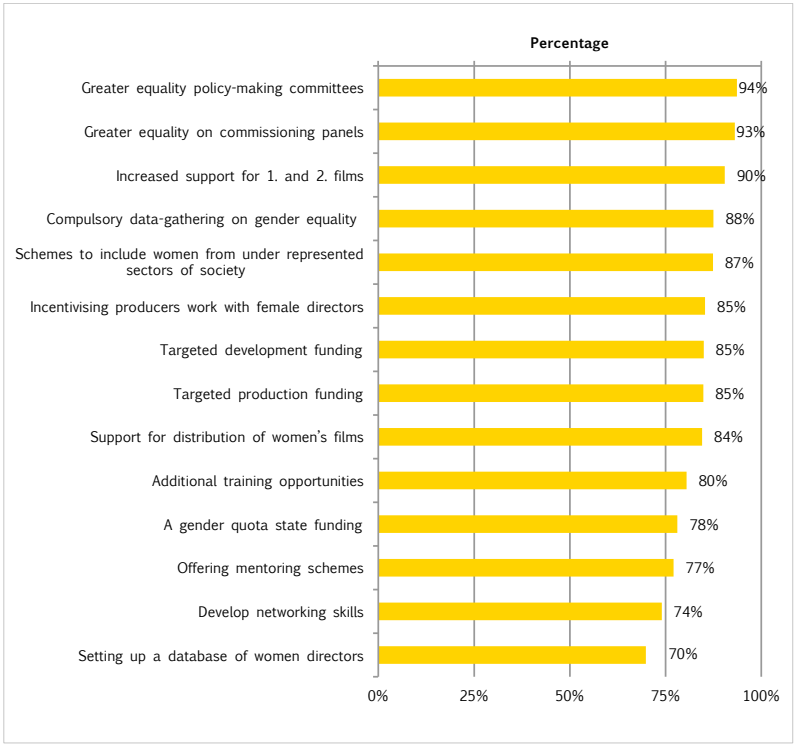
Figure 48b: Policies to sustain female directors' careers: women respondents only



Source: EWA report database - Questionnaire
Note: on the basis of 717 women respondents

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Conclusion

EWA's report shows evidence both of the strength of female directors' potential and the significant challenges they face in achieving support for their films. It reveals the problem female directors face in sustaining their careers once they have entered the industry and ways in which the structure of the European industry is more favourable to male directors, in particular in the distribution of national funding.

EWA's research has also found a lack of coherent data gathering and monitoring systems with which to inform future, evidence-based strategies regarding equality. Building adequate systems to address this is therefore one of the report's principal recommendations. Without these, common practices and assumptions regarding the capacity of female directors and the success of their films cannot be properly challenged.

The report makes fifteen recommendations for action, at both national and European level. EWA offers its findings to urge European agencies and national institutions to review current practices and to make the changes necessary to realise the full economic, creative and cultural benefits of female directors' talent.

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APPENDICES

Contextual information

Demographics

Gender composition of the population in 2013 is remarkably similar in all countries, with women averaging between 50.1% (Sweden) and 51.6% (France and Italy) of the population.

Women as a share of people in employment in 2013 varies between 41.8% (Italy) and 47.6% (Sweden) of the population.

Participation in pan-European support schemes

All countries benefit from the European Union's Creative Europe programme (formerly MEDIA) and, with the exception of the UK, from the Council of Europe's support fund for co-production, Eurimages.

National film organisations

All countries have a national film institute and funding for national film. With the exception of Italy where this is run by the Ministry of Culture, these organisations are more or less independent of government.

Number of directors

The focus of this report is on those professionally active in making fiction films or documentaries of over 60 minutes between 2006 and 2013.

Sourcing this data is problematic in terms of both equivalence and reliability.

Regional Funding

With the exception of Croatia, where nation size militates against separate regional funds, all countries have regional funds, most but not all of which are financed wholly or in part by the national film fund. In the UK this is part of an ongoing decentralisation strategy where film-makers apply to different national funds – for England, Wales, Scotland and Northern Ireland.

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Only France was able to produce complete figures with a breakdown of funding showing gender share. Sweden produced figures for the number of films and gender share. The UK only provided totals for funding across most years.

The overall percentage share for female directors from regional funds is as follows:

- Austria 20.8% (funding share, 2006-2013)
- France 24.2% (funding share, 2006-2013)
- Sweden 36.9% (number of films, 2008-2012)

Given the variations, it was decided that data relevant to regional funding should only appear in national reports.

With the exception of Sweden, none of the countries had statutory policies for gender equality. France was able to present a gender breakdown of annual regional spend. Swedish regional funds are obliged to keep gender-based data but this does not include a gender breakdown for funding amounts, only for the number of projects, and data for several years is missing.

Croatia does not have any significant regional input.

In the UK, Creative England has a generic Diversity and Equality policy but as with the other nations, there is no systematic data gathering or monitoring policy in place.

Public and private broadcasting

In France, Sweden and Croatia both public and private broadcasters have a statutory duty to contribute to the national film fund. The contribution and the way it is calculated vary from country to country and across terrestrial and satellite broadcasting.

In Italy broadcasters contribute directly to film productions and not to the national film fund. In Austria and the UK only the public broadcasting sector has an obligation to contribute.

In the UK the contribution of BBC Films and Channel Four Films has been significant during the period (see below), but the British Film Institute's 5 year plan, *Film Forever 2012-17*, calls on the BBC in particular to make a far more substantial contribution.

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In Italy, Rai has set up Rai Cinema (public) and Mediaset has set up Medusa (Private) to comply with funding obligations. They have become the biggest investors in audiovisual production.

For this study, only France was able to provide a breakdown of total expenditure according to gender in both private and public sectors. In France this was based on figures for 13ème Rue, Canal J, Canal+, Cine+, Direct 8, Gulli, M6, NRT12, NT1, Orange TV, TF1, TMC, TPS, TV5 and W9. In Sweden this was based on figures for TV4 AB.

Only France was able to give a breakdown according to genre for fiction films and documentaries as well as gender. Sweden had figures for fiction only. Austria, Italy and UK provided some statistics for the public sector. Croatia and Germany could not access any statistics.

In addition to the public and private terrestrial broadcasters, in some countries regulation affects the satellite broadcasters. In Croatia there is a statutory obligation to pay into the production sector directly. In France there are several players and regulation for their contribution to national funding varies. In Italy Sky Italia is the only satellite broadcaster which has a marginal but currently increasing investment in TV series. In Sweden, according to the Film Agreement, the satellite broadcasters Modern Times Group and C More Entertainment contribute to the funding of the Swedish Film Institute. In the UK HBO, Sky and Sky Atlantic are key operators but there is no regulation.

Support for distribution

Austria

The Austrian Film Institute offers a special support scheme for cinema release and festival participation. The scheme is open both to distributors and producers.

Croatia

There is no separate fund so distribution support is included in production awards. All films financed are given a release.

Italy

A small share of state support for production can also be allocated to cover distribution expenses and a tax credit is in place for the national distribution of Italian films.

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In 2015 a legal decree has also established support for Italian films considered to be of cultural significance by the DG Cinema. Of ten distributors, six are local, including independents RAI and Medusa.

France

There is comprehensive support for independent companies working to contribute to the diversity of films exhibited in cinemas. This includes support for film distributors, new releases, heritage and young audiences.

Sweden

Alongside Walt Disney and 20th Century Fox, there is a strong Nordic presence which lessens penetration by the commercial majors. Distribution strategy has recently been revised. From now on all films with production support will get distribution support.

UK

The UK separates funding for production and funding for distribution. There is a series of four schemes designed to address different types of films and challenges in the marketplace. There are 24 companies included in the BFI's list of principal distributors. In the top 10 of those independent films receiving BFI support are Lionsgate UK Ltd (a subsidiary of the Canadian-American studio/distribution company) and Momentum, owned by Eone Films, an international distribution company, but the American majors are not included. Over the period 50% of female-directed films that received production funding from BFI also received distribution funds from BFI compared to 22% male-directed films.

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National Reports

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APPENDIX I

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AUSTRIA

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Introduction

This report is one of seven from countries participating in the research project set up by the European Women's Audiovisual Network, *Where are the women directors?* This has come about in response to growing outrage at the marginalisation of female directors in world film culture and the belief that our societies benefit from inclusion and diversity of voices. It is time to *get women into the room* and this report sets out to contribute to the evidence based research necessary to bring about change into the Austrian film industry.

Historical background

After a first brief appearance in the limelight of theatre and film director Leontine Sagan 1931, the first female film pioneers started working at the end of the Sixties, two feminist avantgarde filmmakers Valie Export and Friederike Pezold, both playing eminent roles in their own right in the world famous Austrian Avantgarde Cinema. This laid the groundwork for the next generation with Linda Christanell, Lisl Ponger, Mara Mattuschka and is still flourishing. The reasons for this development has been facilitated by low budgets of the films and the advents of super-8 and later video-technology, therefore lowering the obstacles for women and thus providing continuous funding of *innovative* films in Austria ever since the Seventies.

In the Seventies and Eighties several women succeeded in making fiction films such as Käthe Kratz, the first female TV fiction filmmaker, or Margarete Heinrich, Kitty Kino, Heide Pils, Susanne Zanke and Karin Brandauer, also documentaries filmmakers like Ruth Beckermann were gaining international reputation.

With a new generation at the Vienna *Filmakademie* the *New Austrian Cinema* began at the end of the Nineties. Barbara Albert and Jessica Hausner are celebrated as pioneers and role models with their films in the competitions in Venice and Cannes.

For decades the situation for women in the Austrian public broadcasting (*ORF*) has been very difficult. A milestone was established when the first woman in 40 years to direct an "Austrian" *Tatort* (a popular weekly TV-series) was the Austrian filmmaker Sabine Derflinger, in 2013.[1]

[1] Historical background by Wilbirg Brainin-Donnenberg

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Initiatives addressing the problem

The Austrian association for women in the audiovisual industry *FC Gloria*[2] is working on a study to find the reasons for the *Leaky Pipeline Syndrome* (describing how women drop out of their directing career) as there are 40% of women graduating at film schools but having only 23.5% of cinema releases.

The Arts and Culture Division of the Federal Chancellery funding innovative and experimental films is the only funding body giving 45% of their budget to films with female directors that might be due to the fact that those films are dealing with low budgets, and projects can be presented without a production company.

The *Austrian Film Institute* gives 25% of its budget to films directed by women. In 2012 data collection on women directors and scriptwriters applying and being funded has been started. In 2013 gender parity has been given to the selection committee but since in 2014 the committee has been enlarged, only 45% are women. To make the members of the selection committee aware of the gender unbalance, the *Film Institute* organized a meeting on gender items in autumn 2014. The outcome was a mission statement aiming to a 60:40-share in directing, scriptwriting and producing. The weakest proportion lies within the Supervisory Board with 3 women and 9 men (since beginning 2015), as members have to represent certain ministries and certain occupational groups where women are underrepresented.

To remedy the gender misbalance of producers the *Austrian Film Institute* organized in November 2015 *ProPro – The Women Producers' Programme*, a workshop plus mentoring phase, to help women further develop their career, company strategy and film projects and to increase the number of female decision makers in production. Furthermore the *Austrian Film Institute* funded 100% of the participation costs for women attending the post-graduate production course *MBA Film, TV and Digital Media Management*.

[2] www.fc-gloria.at

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I. Executive Summary and Recommendations

The greatest problem for female directors is sustaining their careers in a risk averse, male dominated market place which perpetuates expectations which are often unfavourable to women. This is aggravated by other factors, such as the freelance nature of the profession, and, for some, the demands of parenting, and leads to a very imbalanced film culture.

Statistics on gender equality to give a comparative and comprehensive understanding of what is happening across the Austrian audiovisual industry are very rare. Many of the statistics for this report have had to be mined from available data. Where data does exist there is little evidence that it is being monitored or structured into coherent, institution-led policies for change. This is all the more surprising given an unchanging situation of inequality which has persisted throughout the period.

Coherent statistics at national and regional level in Austria would enable more precise understanding of the complex factors affecting gender equality, both in the commissioning process, and in finding the audience for female-directed films.

Education and Entry

Increasing the number of female directed films included in the curriculum and in film clubs, and affirming women's role in media literacy at school would help prepare more girls to take on the career.

The number of women wanting to be directors currently far exceeds places at film school and women are 39% of those qualifying from the directing course of *Filmakademie*[3]. The conversion rate from applicant to graduate is more favourable for women as the share of graduating female students from all graduating students is higher than the share of female applicants.

The majority of Austrian female respondents acquired their directing skills through *learning by doing* and *Internships*. Film schools and training courses matter less for both male and female respondents. Only 39% of Austrian respondents attended film school. Still every second respondent, 53%, considers film school as an important way into directing.

[3] part of the *Department of Film and Television* at the *University of Music and Performing Arts*, Vienna

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Funding

In public funding female directors are significantly under represented and poorly served. EWA's evidence shows that the overall share of national, regional funding or public broadcaster financing for cinema films with a female director ranges from 20.6% to 24.3%. Apart from the cinema film financing programme of the Austrian public broadcaster *ORF* no gender data was available within both the public and private broadcasting sector.

Only 12.3% of all production budgets of cinema releases that received national funding between 2011 and 2013 are allocated to films directed by a woman. Average production budgets of female directed films are significantly smaller than male for both fictions and documentaries. The presence of female directors declines with the increase of budget amounts.

From the slightly more than 50% share of women in Austria's population, the almost 48% share of women employed in Austria and the almost 40% share of female graduates of *Filmakademie*'s directing course suddenly drop to somewhere between 20 and 25% when it comes to female directors in receipt of national funding. Obviously the gender shares are disturbed somewhere between graduating from *Filmakademie* and receiving national funding.

This phenomenon was addressed by the Austrian association for women in the audiovisual industry *FC Gloria*: In order to receive production funding for cinema films in Austria any director needs a production company. *FC Gloria* considers that the mainly male-led production companies and their overcoming inherent distrust of women's abilities are responsible for the fact that many female directors disappear after having graduated (*Leaky Pipeline Syndrome*).

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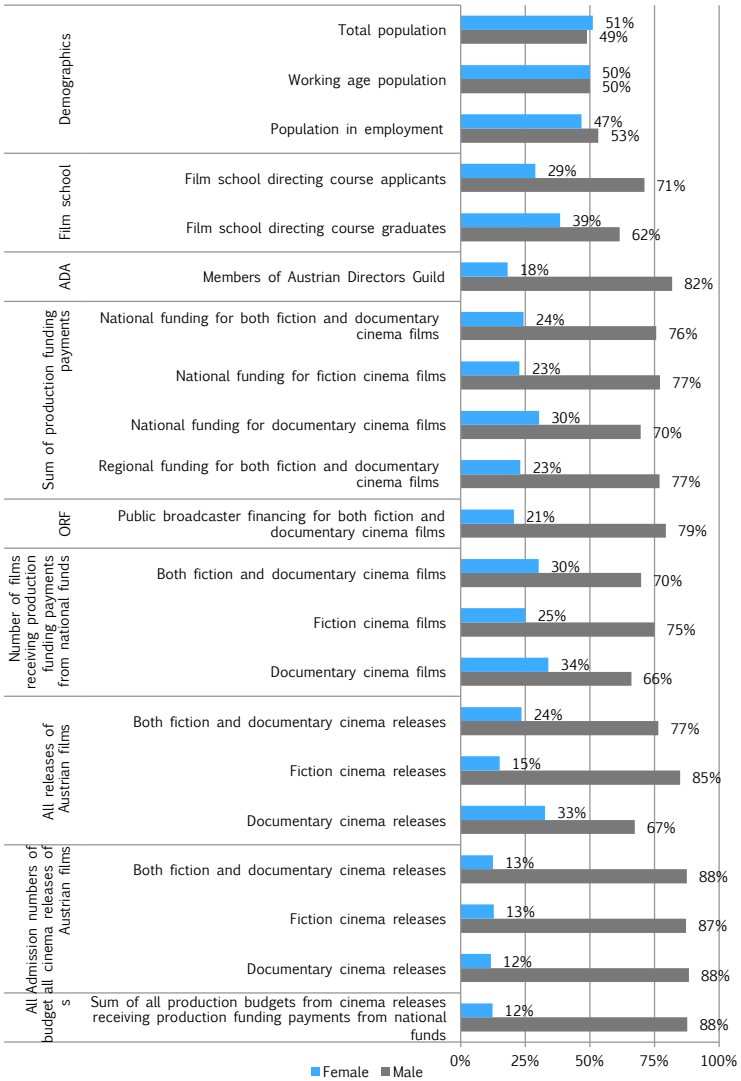
Figure 1: Austrian film industry: Gender shares across key indicators



Source: EWA report database – Survey

Reasons for low number of female directors

As competing for funding is a key challenge for women, respondents to the online questionnaire deplore the absence of female producers in Austrian male-dominated film industry.

Most female directors who are parents are not discouraged by the competing demands of parenting itself, but by the industry's lack of adjustment to the way in which it affects career progression, for instance when re-entering the market after starting a family. Online respondents indicate that the situation for young female directors and their first films is encouraging but for those older than 35, especially those with children, increasingly inadequate.

Reaching the audience

23.5% of all Austrian cinema releases of the years 2006-2013 have a female director. The share for fiction releases increased significantly within the observed period while documentary releases remained constant.
The share of female-directed films' admission numbers is low, averaging 12.5% within the observed period, but must be seen within the context of significantly smaller production budgets for films directed by women. This leads to less competitive marketing and distribution strategies for female-directed films.

Quality of female directed films

From EWA's analysis of releases of Austria in one year, 2013, films directed by women are more likely to win awards and get invitations to participate in film festivals than male-directed films. This evidence of critical success undermines claims about quality used to justify female directors' significant underrepresentation at A-list festivals.

The way forward

The response to EWA's questionnaire on the social impact of increasing the number of female directed films was universal in feeling that it would change the way women are represented on screen and almost all respondents felt that it would also lead to equal rights.
To orient girls towards directing, schools still play a vital role and including gender perspectives in media literacy and increasing the number and profile of films by women directors both in the curriculum and in film clubs were seen as key strategies for the education sector.

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Recommendations

- Data monitoring, data mining and data analysis has to be increased to cover all fields of the film industry. To increase the awareness of gender inequality, data has to be published on a wide scale.
- As short films, film schools and documentaries are considered as most important routes into directing, more support for female directors in these areas is recommended.
- *Filmakademie* should provide access for female professors and lectures in order to create female role models and offer incentives for female contents.
- Offering incentives to encourage producers to present more projects with female directors could result in getting those projects out of the ghetto.
- Even though parenting does not in principle have a negative influence on the work of film directors, offering better childcare adjusted to the needs of directors, and funding programmes that adjust to the specifics of female CVs could be possible ways of keeping women as directors in the audiovisual sector.
- To achieve a more specified promotion for female directors focusing on a more specific target group, incentives for distributors to distribute films from female directors are needed as much as incentives for women to become film distributors.
- Film literacy is not a topic in today's Austrian school system, it has not found its place within artistic subjects like *Music* or *Arts* although it is of vital importance to create awareness for its impact as a creator of role models, to teach critical reception as well as how to "read" a film.
- TV-stations should be encouraged or – talking about public channels - obliged to broadcast more programmes directed by women; incentives for distributors who distribute films directed by women could be an asset, too.
- As films with female directors perform better at festivals than films directed by men but men are getting the more prestigious festivals and prizes, it is a necessity to make all festivals including A-list festivals aware of the quality of women's directed films.
- Evaluation of all funding institutions in Austria, taking into consideration the budget of the respective funds. It would be useful to ask beneficiaries to self-evaluate their projects on gender equality in terms of people working on the

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project in key positions and in general and their payment - based on a harmonized system.[4]

- Measures to balance the unequal system sustainably have to be found. Sweden could be taken as an example.[5]
- Funded structures as the *Film Archive Austria*, the *Austrian Film Museum*, various festivals and distribution platforms should be asked to consider gender equality within their actions. This could be reinforced by monetary incentives.[6]
- A socio-scientific research on the *Leaky Pipeline Syndrome* should be launched in accordance with the *Filmakademie* and the professional organizations.[7]
- Gender parity within the supervisory board of the *Austrian Film Institute*.[8]
- Obligatory gender budgeting based on *step by step* quotas should be regulated within the legal framework.[9]

Further Research

The EWA study gives a very interesting first overview on working conditions for women in the audiovisual sector leaving much more space for further research:

- Broadcasters are not publishing data on gender equality. Being the most important client within the audiovisual sector and reaching the broadest audience it would be interesting to get data on how many programmes are done by women. In 2014 the German directors guild *Bundesverband Regie BRV* published their first diversity report *Erster Regie-Diversitätsbericht des BVR 2010-2013*[10]. The study assigned by the members of the *BRV* came to the result that fictional productions with a female director represent only 11% of prime time broadcasting aired by the two German public broadcasters *ARD* and *ZDF* within the observed period of four years. In order to complete the analysis of the Austrian situation of female directors Austria's public broadcaster *ORF* should be surveyed as well.

[4] recommendation taken from *FC Gloria*
[5] recommendation taken from *FC Gloria*
[6] recommendation taken from *FC Gloria*
[7] recommendation taken from *FC Gloria*
[8] recommendation taken from *FC Gloria*
[9] recommendation taken from *FC Gloria*
[10] see *BVR* website: http://regieverband.de/de_DE/magazine/203349/index

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- Content-wise it would be very interesting to get more information on the picture given in female roles especially on TV-programmes.
- Gender budgeting could be used in a wider range: for the time being only women working as directors are taken into consideration. Figures on scriptwriters (whose stories are told?), producers and any other key positions would be as interesting, as would knowing how much money is allocated to men and how much money is allocated to women working on an audiovisual production.
- In case of structural funding e.g. for film festivals, agencies or institutions the beneficiaries could be asked to pay attention to gender equality within the programme shown.

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II. Methodology

This project has been designed to follow female directors through the trajectory of their careers and to identify key factors which obstruct their progression in the industry. Its scope does not include representational, on-screen issues.

EWA's data has been gathered through two sources: a comprehensive survey of national contexts and statistics provided by the seven research teams, and a questionnaire distributed through national professional organisations to almost 900 professionals, male and female, working in and associated with the European film industry. The results have been analysed with the assistance of experts from Sheffield Hallam and Rostock Universities. Findings have been discussed at a series of meetings held during the research period. Both Austria and Germany joined late in the process, in summer 2015.

In the presentation of the report the findings from both sources are presented alongside to complement the emerging picture.

2.1 Quantitative survey

The research covers where possible the period 2006 – 2013. To assess trends across highly variable annual data for film production and release, data from these eight years has been divided into two 4 year groups.

The data covers documentary and fiction film of 60' and over for cinema release. Information on gender equality in the public and private broadcasting sector has not been available.

For the purpose of this analysis, a film is considered as Austrian if it is either a 100% national film in terms of financing or an official coproduction according to Austrian treaties and certified by the *Federal Ministry of Science, Research and Economy*. There are three national funding bodies that have been taken into consideration for this study: The *Austrian Film Institute* allocated an annual budget of 20 million euros in 2015 to funding for full length feature, documentary and animation films dedicated for cinema release according to the *Film Funding Act*; the *Arts and Culture Division of the Federal Chancellery of Austria* which was originally part of the former *Federal Ministry of Education, Arts and Culture*, based on the Art Funding Act funding innovative and experimental films with an annual budget of 2 million euros in 2015; the third funding body acting on a national level is the

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Filmlocation Austria, a subsidy programme by the Austrian *Federal Ministry of Science, Research and Economy* with an annual budget of 7.5 million euros.

Within the framework of the *Film/Television Agreement* between the *Austrian Film Institute* and the *ORF* cinema movies can be financed by the *ORF* if they have preliminary funding from the *Film Institute*, the *Chancellery* or a regional fund. In 2015 the budget available was at 8 million euros.

Almost all federal states in Austria do have a regional film funding system but acting on very different levels. Whereas the *Vienna Film Fund* is acting on a regular basis with an annual budget of 11 million euros smaller federal states do not have a fixed budget for film funding and provide funding as required. For the study only the ones acting on a regular basis with a fixed budget have been taken into account.

Production funds can be allocated across more than one year but for the purpose of the report they have been included in the year when the first instalment of production funding was paid out. As a general principle it should also be remembered that there is usually a two year lag between production and release.

The survey's statistics for funding and releases have been gathered from several sources: from the *Austrian Film Institute's Filmwirtschaftsbericht* (Film Industry Report) and the internal database; from the *Austrian Directors Guild;* from the *Filmlocation Austria;* from *The Arts and Culture Division of the Federal Chancellery of Austria,* from the *Austrian Film Commission*[11]*;* from the Austrian association for women in the audiovisual industry *FC Gloria* and from *Statistics Austria*[12]. Full data can be found on EWA's site *www.ewawomen.com*.

Films with two, three or four directors count as female- or male-directed according to the gender of the first mentioned director in the credits. For this purpose the order specified by the production company is binding. Films directed by a team of directors with more than four directors were not taken into consideration.

2.2 Online Questionnaire

In July 2015 the EWA online questionnaire was distributed to the seven participating countries. In Austria the questionnaire was sent out via the *Austrian Film Institute* to institutions such as professional guilds, film schools, film funds, TV broadcasters and

[11] The *Austrian Film Commission, AFC* is an organization dedicated to promoting Austrian cinema throughout the world. It represents Austrian films at all major festivals and markets.
[12] www.statistik.at

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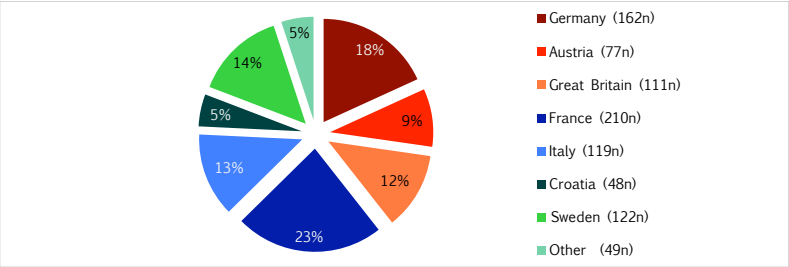
several other professional networks who themselves spread the questionnaire to representatives of the Austrian film industry. 77 respondents answered the Austrian online questionnaire, which is 9% of the total sample of 898 respondents.

Figure 2: Number of questionnaire respondents according to country



Source: EWA report database – Questionnaire

Of the respondents the majority have experience in three creative sectors: 57% described themselves as directors, 49% as scriptwriters and 36% as producers. The rest are spread across all sectors of the industry.

Most of Austrian respondents are female 81%, only 19% (15 n) are male. This does not represent the gender distribution in the field, thus the differences between male and female answers have to be interpreted carefully. In all participating European countries respondents are disproportionately female with the lowest share in the UK with only 8% of male respondents and the exceptions Sweden and Croatia, where male respondents account for approximately a third of all respondents. Due to the low number of male respondents in the UK no differentiation is allowed while in Austria it is.

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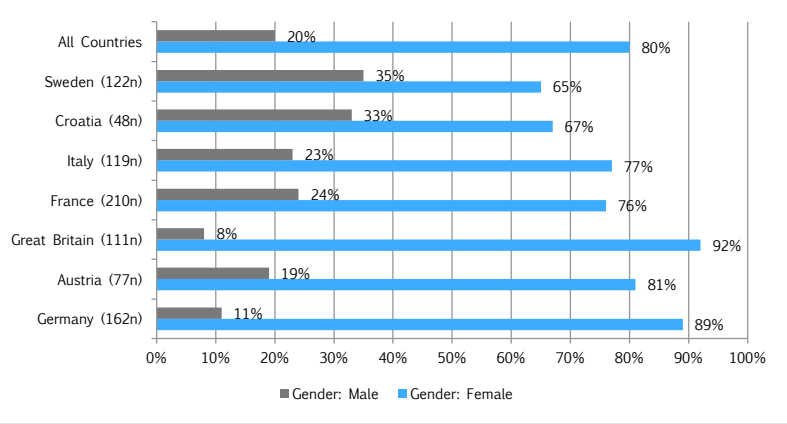
Figure 3: Gender distribution per country



Source: EWA report database – Questionnaire
Note: n = number of respondents

Several questions invited respondents to select more than one option, so results do not always add up to 100%. Where respondents select on a 1-4 scale, the scale points either represent 1 = *applies fully*, 2 = *applies*, 3 = *applies less*, 4 = *does not apply at all* or 1 = *very important*, 2 = *important*, 3 = *less important*, 4 = *not important*. Results of questions that have been answered with a 1-4 scale are graphed with the summed percentage shares of respondents who indicated the top two answers (*applies fully* and *applies* or *very important* and *important*).

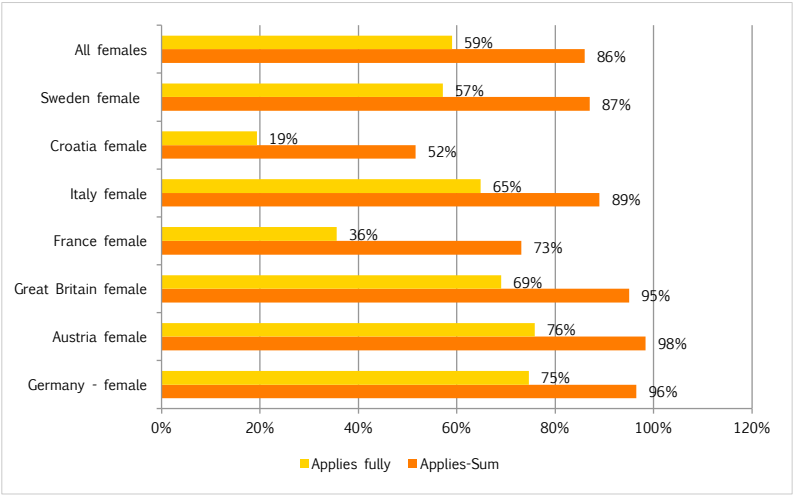
The data has been analysed and processed by Rostock University's Institute for Media Research. Full data can be found on the EWA's site *www.ewawomen.com.*

III. Women's presence in the industry

3.1 Does gender inequality exist?

Austrian respondents were asked to select on a 1-4 scale: 1 = *applies fully*, 2 = *applies*, 3 = *applies less*, 4 = *does not apply at all*. The chart below shows both the summed percentage shares of respondents who indicated the top two answers (i.e. *Applies-sum,* the sum of *applies fully* and *applies*) and the top answer *Applies fully*. The sum of the top two answers *applies fully* and *applies* account for 98% of all 62 Austrian female respondents; 76% of them even indicate that the existence of gender inequality in the national industry *applies fully*. Together with the UK and Germany Austria ranks among those countries with the highest perceived inequality.

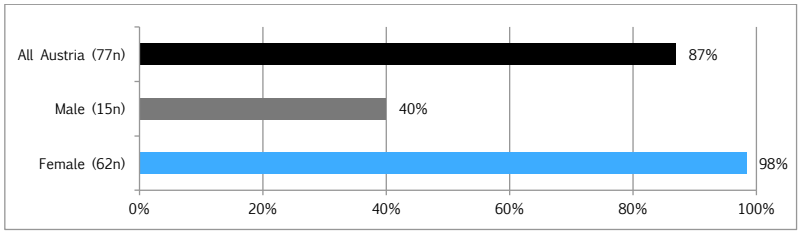
Figure 4: Europe: do you think gender inequality exists for directors in your national industry? Females only



Source: EWA report database – Questionnaire

Female and male opinions diverge. Still differences between female and male indications have to be interpreted carefully due to the low share of male respondents. From 77 Austrian respondents 81% are female and only 19% are male. Male respondents indicate that the existence of gender inequality *applies less.*

Figure 5: Austria: Diverging opinions of female and male respondents. Do you think gender inequality exists for directors in your national industry? Sum of "applies fully & applies"



Source: EWA report database – Questionnaire

Recommendations

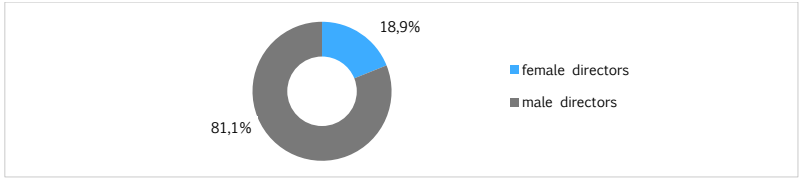
Data monitoring, data mining and data analysis has to be increased to cover all fields of the film industry. To increase the awareness of gender inequality, data has to be published on a wide scale.

3.2 Number of working directors

Two organisations represent film directors in Austria: the Austrian Directors Guild and the Austrian Directors' Association (ADA). While there is some overlap in membership, it is not apparent which of the two has the greatest reach. No figures were provided by the ADA, nor was any breakdown of other occupations within the industry. The proportion of female film directors at the Austrian Directors Guild has remained more or less steady over recent years, at just under 20%.

The Austrian association for women in the audiovisual industry *FC Gloria* states the share of female directors within the industry as 34%.

Figure 6: Members of the Austrian directors guild, average 2009-2013



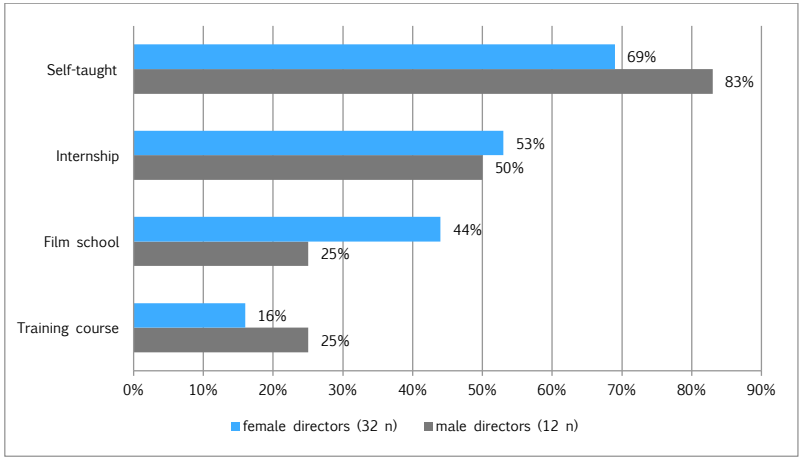
Source: EWA Database - Survey

IV. Entry into the industry

4.1 How did you get your skills?

Multiple answers were possible. Most of the female and male directors learnt their skills with *learning by doing* (respectively self-taught); close behind they indicate the internship/apprenticeship in the media industry. The fewest female directors learnt their skills in training courses, 44% of female directors went to film schools, whilst only 25% of male directors attended film schools and training courses.

Figure 7: Austria: How did you learn the skills to become a director? Directors only (44n)



Source: EWA report database – Questionnaire

Notes:

1. n = number of respondents
2. multiple answers were possible

Only 39% of all Austrian respondents attended film school in order to learn the skills to become a director, the lowest value within the European context.

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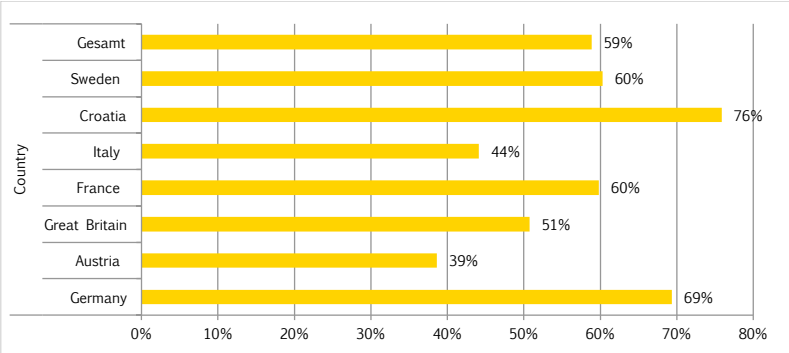
Figure 8: Europe: How did you learn the skills to become a director? Directors only (537n) indicating "at film school"



Source: EWA report database – Questionnaire
Note: n = number of respondents

85% of the Austrian directors who did not go to film school learnt their skills through *learning by doing* (highest scores also in the other participating European countries). 48% did an apprenticeship in the media industry, 15% attended training courses.

59% of the Austrian directors who went to film school did an internship additionally (highest scores in Sweden and Italy), 53% considered *learning by doing* crucial in addition to their film school attendance and 24% also visited training courses.

4.2 What was your route into directing?

The questionnaire asked people whether a range of pathways into directing were *important*, *not* or *less important* including the option of *no opinion*. Austrian directors considered short films (Austrian average 64%), film schools (Austrian average 53%) and documentaries (Austrian average 47%) as most important routes into directing. Compared with the still higher European average there is a difference in percentage points of 15 for short films, 20 for film schools and 25 for documentaries that can be interpreted as potentially significant.

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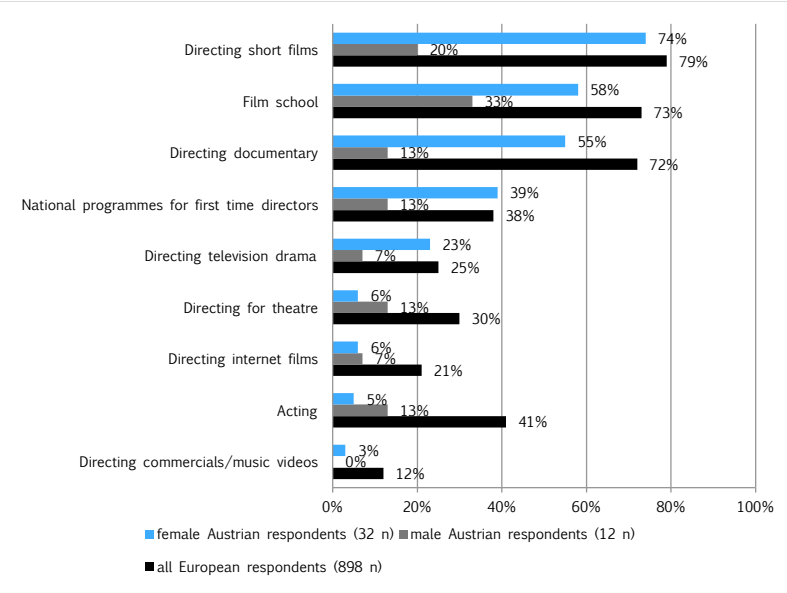
Figure 9: Austria: Route into directing? Directors only (44n) indicating "important"



Source: EWA report database – Questionnaire

Comments from Questionnaire

Respondents wanted the possibility to have access to TV-directing and criticized the absence of incentive programs for first film directors. Clearly, the *Startstipendien* programme offered for first time directors by the *Arts and Culture Division* of the *Federal Chancellery of Austria* is not sufficient.

Recommendations

As short films, film schools and documentaries are considered as most important routes into directing, more support for female directors in these areas is recommended.

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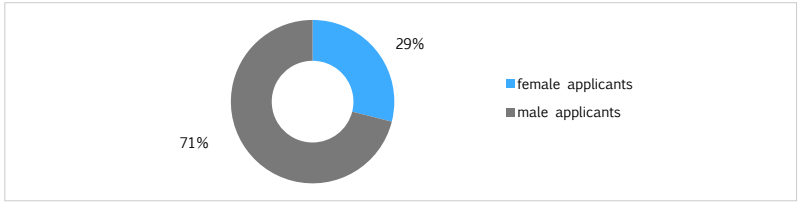
4.3 Women directors' presence in film school

Figures were taken for applicants and students from the *Directing* course of the Department of Film and Television *(Filmakademie)* at the University of Music and Performing Arts, Vienna.

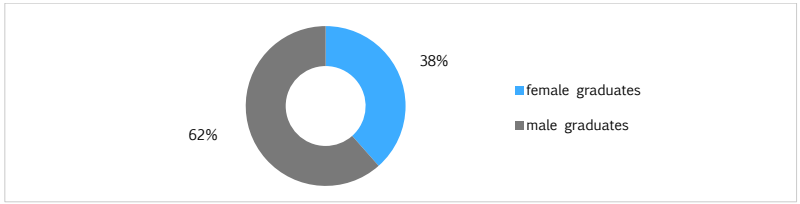
The number of applicants is consistently higher than places available for both men and women. Whereas women comprise on average 28.9% of the overall number of applicants they form 38.5% of the graduates, so the conversion rate from applicant to graduate is more favourable for women.

Figure 10: Share of applicants for Filmakademie directing course, average 2010-2013 (%)



Source: EWA report database - Survey

Figure 11: Share of graduates from Filmakademie directing course, average 2010-2013 (%)



Source: EWA report database - Survey

Comments from Online Questionnaire

Respondents expressed their wish to have more female teachers, more female role models and to get a new structure within the *Filmakademie* with less patriarchal structures.

Recommendations

Filmakademie should provide access for female professors and lectures in order to create female role models and offer incentives for female contents.

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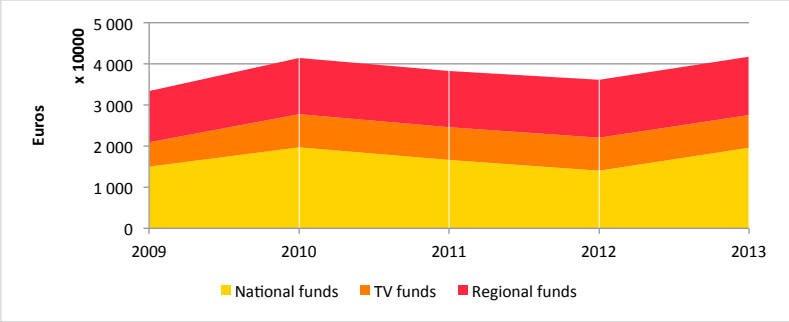
V. National funding

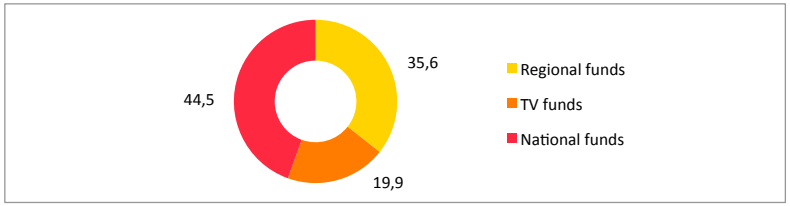
In Austria national film funding comprises: *Austrian Film Institute*, *The Arts and Culture Division of the Federal Chancellery of Austria*[13] and *Filmlocation Austria*. In Addition one television-related fund, *Film/Fernseh-Abkommen* (*Österreichischer Rundfunk - ORF*) represents a source of financing. Each of the nine federal provinces provides regional film funding. This report concentrates on regional funding institutions with a fixed annual funding budget and funding on a regular basis. These are Salzburg; Styria (*Cinestyria*); Tyrol (*Cine Tirol*); and Vienna (*Filmfonds Wien*).

Figure 12: Sources of film financing



Source: EWA report database - Survey

Figure 13: Sources of film financing, 2009-2013 (%)



Source: EWA report database - Survey

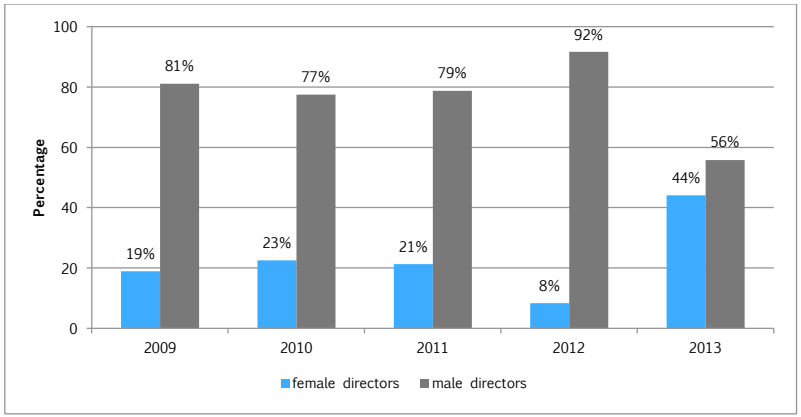
[13] "*Pursuant to the Federal Ministries Act (Federal Law Gazette I No. 11/2014) of 1 March 2014, the Arts Division and the Culture Division, which were originally part of the former Federal Ministry of Education, Arts and Culture, are integrated into the organisational structure of the Federal Chancellery. Since 1 May 2015 the areas of the Culture Division and the Arts Division were combined in the new Arts and Culture Division.*" (see http://www.kunstkultur.bka.gv.at/site/8083/default.aspx)

5.1 National production fund

The figures of this section are based on total amounts of production funding payments actually paid out for a specific project or film by at least one of the three national funding institutions (*Austrian Film Institute, The Arts and Culture Division of the Federal Chancellery of Austria, Filmlocation Austria*) according to the year of first instalment. All Austrian films including majority and minority co-productions receiving funding from national funds are taken into consideration.

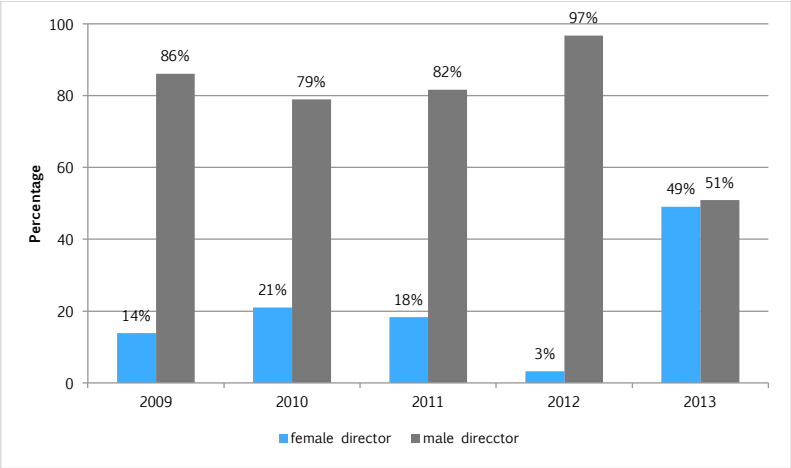
Between 2009 and 2013, female directors' overall share of production funding payments from national funds has averaged 24.3%. Their share of fiction production funding payments from national funds has averaged 22.8%. Women's average share for documentaries is comparatively high with 30.3% and might be related to lower production costs.

Figure 14: Production funding payments from national funds



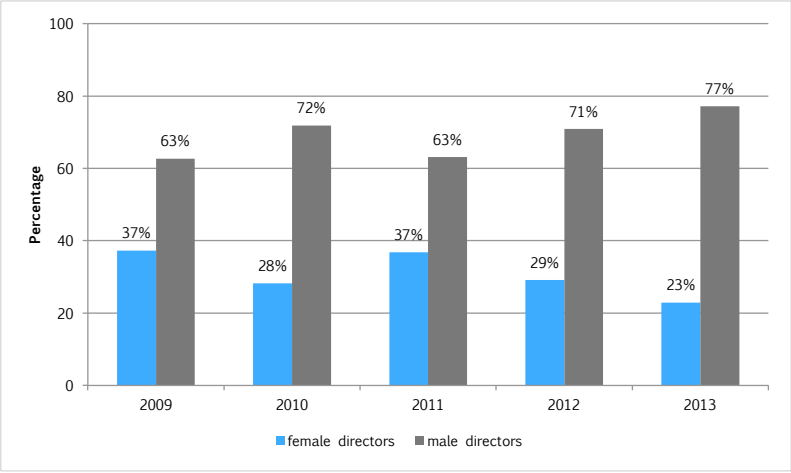
Source: EWA report database - Survey

Figure 15: Production funding payments from national funds for fiction films



Source: EWA report database – Survey

Figure 16: Production funding payments from national funds for documentaries



Source: EWA report database - Survey

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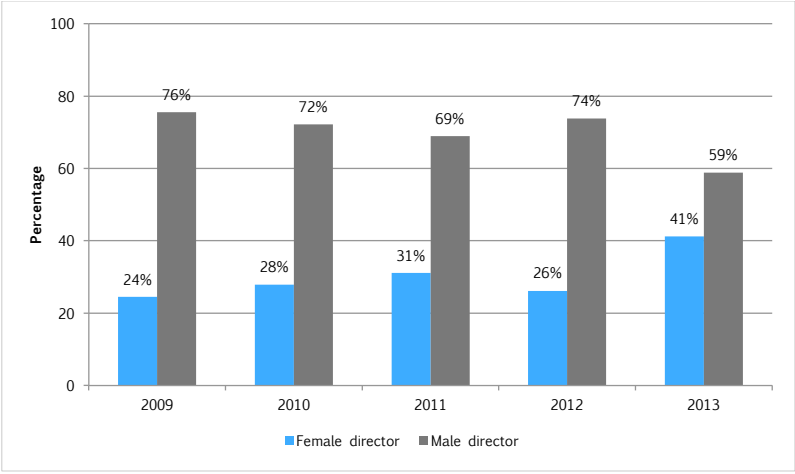
5.2 Number of films receiving production funding payments

Between 2009 and 2013, female directors' overall share measured against the number of films receiving production funding payments from national funds has averaged 30.2%. Their share of fiction films receiving production funding payments from national funds has averaged 25%. Women's average share for documentaries is with 34% again higher than the share of female-directed fiction films.

Figure 17: Number of films receiving production funding payments from national funds



Source: EWA report database - Survey

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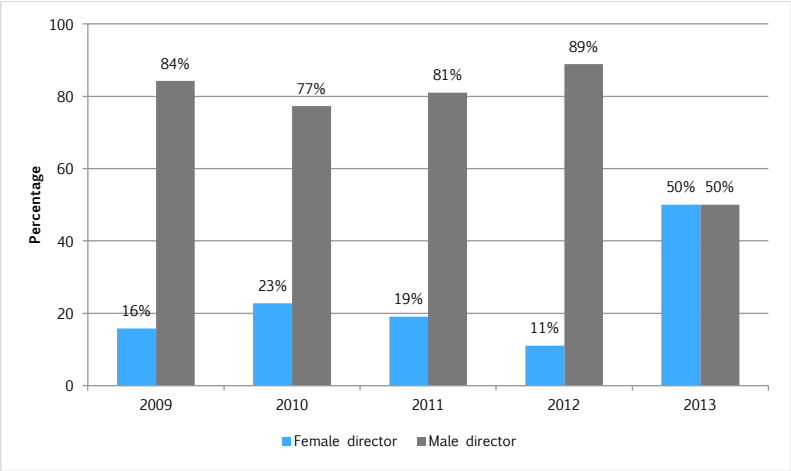
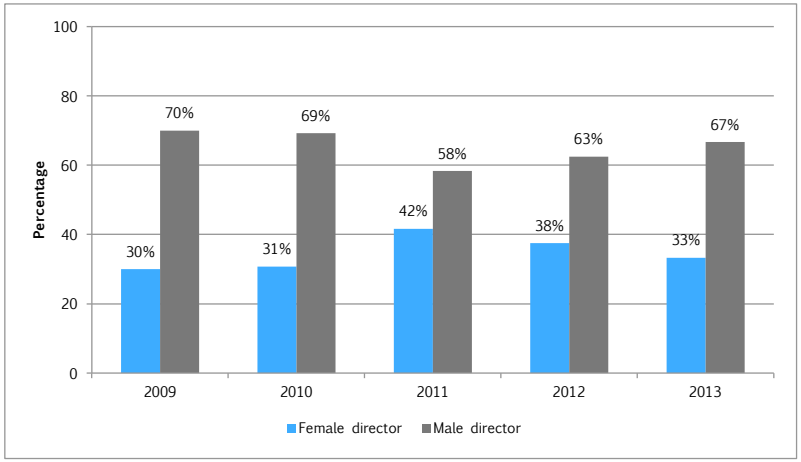
Figure 18: Number of fiction films receiving production funding payments from national funds



Source: EWA report database - Survey

Figure 19: Number of documentary films receiving production funding payments from national funds



Source: EWA report database - Survey

Female directors' shares increase with the number of films taken into account (see table). This is linked to the fact that films with male directors receive higher average production funding payments than female-directed which is due to the fact that male-directed films have higher average budgets.

Figure 20: Share of female directors measured against…

Share of female directors measured against …	Female directors' share of all films, 2009-2013	Female directors' share of all fiction films, 2009-2013	Female directors' share of all documentary films, 2009-2013
… production funding payments from national funds	24.3%	22.8%	30.3%
… number of films receiving production funding payments	30.2%	25.0%	34.0%

Source: EWA report database - Survey

5.3 Female directors' share of average budgets and production funding payments

For fiction films the average production funding payment for a male-directed film is constantly higher than for a female-directed film. Within the period 2009-2013 the average production funding payment of a female-directed fiction film is 11.2% smaller than a male-directed fiction film[14]. Although shares of female directed documentaries are mostly higher than those for fiction films, documentaries with a female director receive on average 15.7%[15] less production funding payments than those with a male director.

The comparatively small differential of 11.2% or 15.7% shows that once a female director gets into national funding she seems to be treated almost equally. So the difficulties have to do with female directors' way to get into the circle of funded directors. The 38.5% share of female graduates from *Filmakademie* shrinks to a 30.2% share measured against the number of films receiving production funding payments

[14] Average amount of production funding payments for female-directed fiction film within the period 2009-2013: 600.085 Euro; for male-directed fiction film: 675.531 Euro

[15] Average amount of production funding payments for female-directed documentary film within the period 2009-2013: 103.092 Euro; for male-directed documentary film: 122.353 Euro

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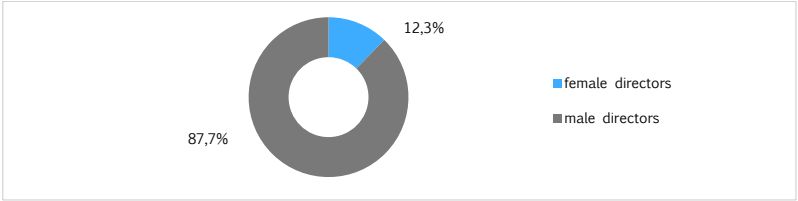
and to a 12.3% share measured against the amount of all production budgets of all films released over the period 2011 to 2013[16].

Figure 21: Share of all budgets from cinema releases with national funding, 2011-2013



Source: EWA report database - Survey

The Austrian association for women in the audiovisual industry *FC Gloria* is currently working on a study that gives a possible explanation for the phenomenon of female directors' disappearance between *Filmakademie* and workplace film industry (*Leaky Pipeline Syndrome*). The study considers production companies a major source of the problem.

Applying directors need a registered production company for their application for funding from the *Austrian Film Institute*, from *Filmlocation Austria*, from *Film Fonds Vienna* (biggest regional fund) and from the *ORF Film/Television Agreement*. Approximately 83% of these production companies are in the hands of men. The producer chooses the subject of a film, determines what will be realized and calculates the budget of a film. For women it is more difficult to place their themes and contents within this gender unequal surrounding.

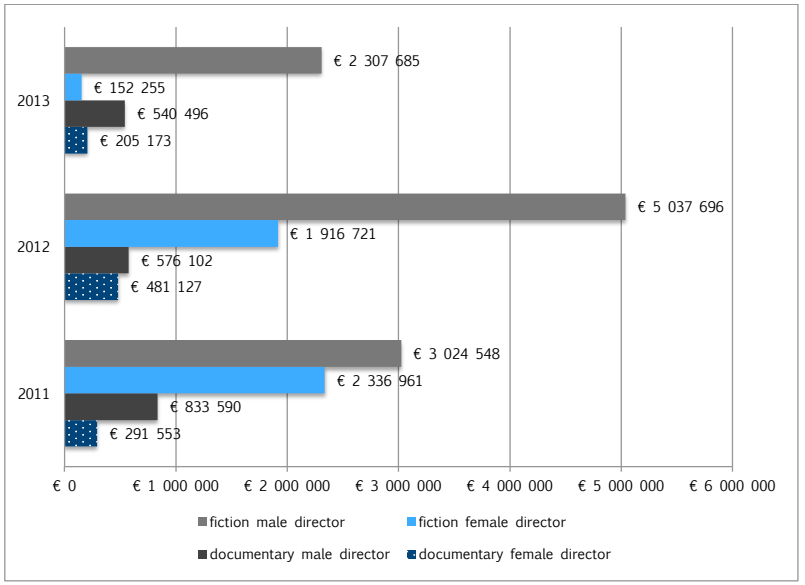
The picture changes when funding is granted without the patronage of a production company. *The Arts and Culture Division of the Federal Chancellery of Austria* hosts the innovative film fund (*innovative Filmförderung*), which funds artistic fiction- and documentary films with low budgets, short films and new-talent films. Applying filmmakers are entitled to apply without a production company. From all films funded by the *The Arts and Culture Division of the Federal Chancellery of Austria*, 45% have a female director, this is almost twice as high as the 24.3%-share of female

[16] The observed period had to be shortened here due to the fact that production budgets are difficult to access as no data was available.

directors' films that received production funding payments from national funds between 2009-2013.[17]

Gender differences increase looking at the actual average production budgets of the cinema releases of the years 2011 to 2013 that received funding from national funding institutions, namely from the *Austrian Film Institute, The Arts and Culture Division of the Federal Chancellery of Austria* and *Filmlocation Austria*. The overall share for budgets from films with a cinema release directed by a woman accounts for 12.3% within the period 2011-2013 (see graph above).

Figure 22: Austria: Production budgets per film by genre, 2011-2013



Source: EWA report database - Survey

Within the observed period 2011-2013, 8 films had a budget of more than 7.5 million euros. Each of these big-budget films had a male director. The table shows detailed budgets of these 8 films. Due to data protection film titles are anonymized.

[17] This section was taken from the *FC Gloria* study *Geschlechterverhältnisse in der österreichischen Filmbranche* about gender conditions in Austrian film industry. The study will be published in 2016 on *FC Gloria*'s website www.fc-gloria.at.

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Figure 23: Austrian big budget films of the cinema release years 2011 to 2013

2011	2012	2013
Film 1 9.6 million euros	*Film 4* 16 million euros	*Film 8* 10 million euros
Film 2 7.9 million euros	*Film 5* 10.8 million euros	
Film 3 7.6 million euros	*Film 6* 10.3 million euros	
	Film 7 8.1 million euros	

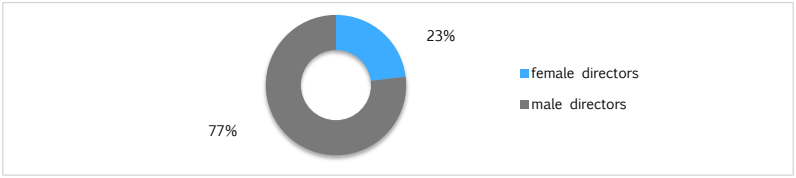
Source: EWA report database - Survey

5.4 Regional funds

Comprehensive data for regional funds in Austria is only partially available. Therefore the report concentrates on the four main Austrian federal provinces (*Bundesländer*) such as Salzburg, Tyrol (*Cine Tirol*), Styria (*Cinestyria*) and Vienna (*Filmfonds Wien*). Data of the other institutions for regional funding is often difficult to access as funding occurs irregularly without a fixed respectively guaranteed funding budget. Figures of those other regional funders were included whenever available.

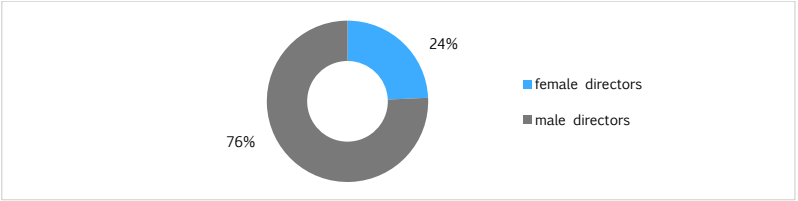
The figures of this section are based on production funding payments allocated to a specific project or film. Between 2009 and 2013, female directors' overall share of production funding payments from regional funds has averaged 23.1%. A difference to the disadvantage of women of 1.2 percentage points compared with the national funding average of 24.3% has to be noted.

Figure 24: Share of production funding payments from regional funds, 2009-2013 (%)



Source: EWA report database – Survey

Figure 25: Share of production funding payments from national funds, 2009-2013 (%)



Source: EWA report database – Survey

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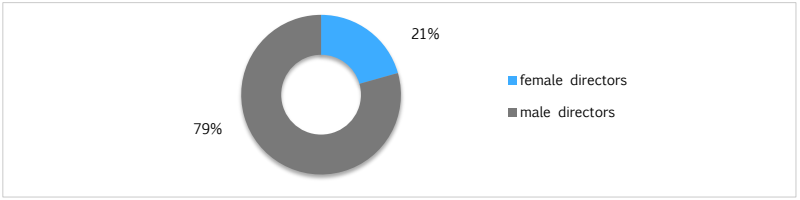
VI. Investment by broadcasters

6.1 Public broadcaster

The *ORF Film/Television Agreement* between the *Austrian Film Institute* and the Austrian public TV broadcaster *ORF* (*Österreichischer Rundfunk*) provides cinema film funding with an annual budget (2015: 8.000.000 EUR). In exchange, the ORF keeps terrestrial TV rights for Austria, South-Tyrol and the Austria-to-Satellite rights. Between 2009 and 2013 the average share of funding for female directors from the ORF Film/Television Agreement accounts for 20.6%. The observed drop in the female share compared to production funding payments from national funds (24.3%) by 3.7 percentage points demands further analysis in regard to the commercial interests.

Figure 26: Share of public broadcaster cinema film funding, 2009-2013 (%)



Source: EWA report database - Survey

6.2 Private broadcaster

No data has been available for private TV.

6.3 Impact of female director on public funders

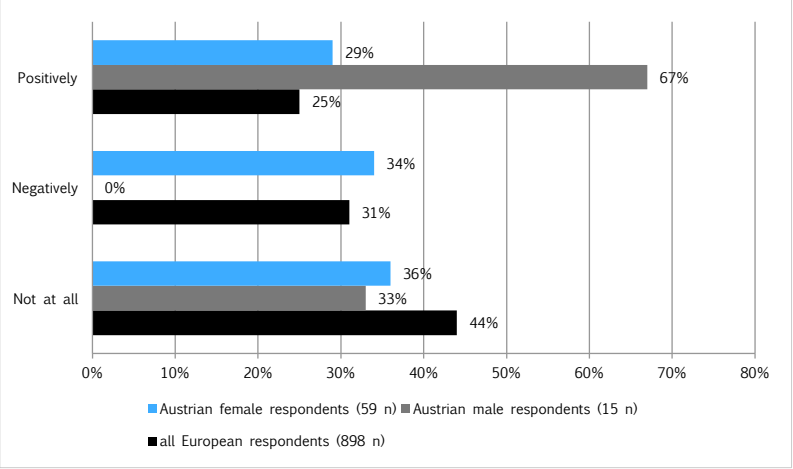
Most of the Austrian respondents (37%) think that a female director has a positive impact on public funders. 35% indicate that there is no impact at all, 27% state a negative impact. Due to the low number of male respondents of the online questionnaire the differences between male and female answers have to be interpreted carefully. Nevertheless the contradictory perceptions of male and female

respondents in Austria concerning the impact of female directors on funders are apparent.

Most male respondents (67%) indicate that a female director has a positive impact on public funders' decision, none of them think that the impact is negative, whilst female respondents divide their answers evenly on the three possible answers with a slight preference for *No Impact at all* (36%), followed by 34% indicating a negative impact and 29% for a positive.

On the European level more respondents believe in the negative impact (31%) than in the positive (25%), whilst most of them think there is no impact at all (44%).

Figure 27: Austria: Diverging opinions of male and female respondents: If a project is directed by a woman, how do you think this impacts on public funders' decision to fund?



Source: EWA report database – Questionnaire
Note: n = number of respondents

In the international comparison Austria ranks with 27% among the countries with low values for the negative impact on public funders ahead of France and Croatia with the lowest values.

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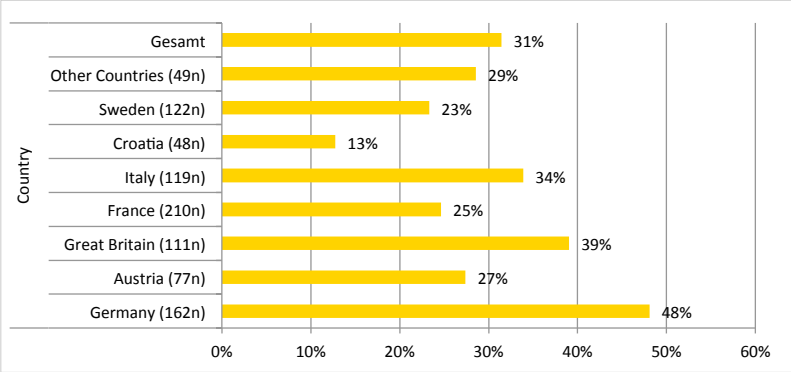
Figure 28: Europe: If a project is directed by a woman in your country, how do you think this impacts on public funders decision to fund? Negatively

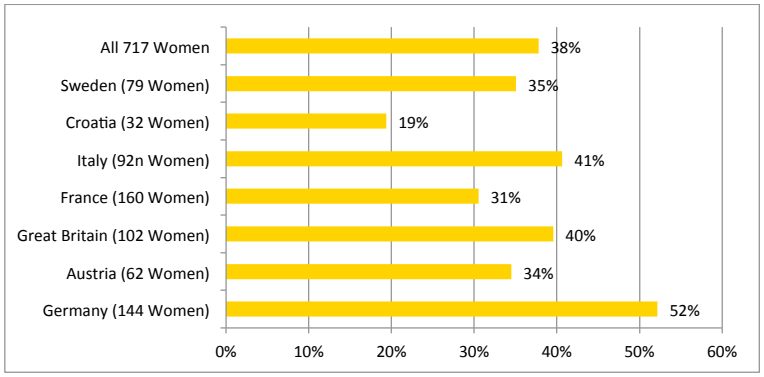


Source: EWA report database – Questionnaire

Note:

1. n = number of respondents
2. on the basis of 898 respondents

Figure 29: Europe: If a project is directed by a woman, how do you think this impacts on public funders' decision to fund? Women only, indicating "negatively".



Source: EWA report database – Questionnaire

Note:

1. n = number of respondents
2. on the basis of 717 women responding

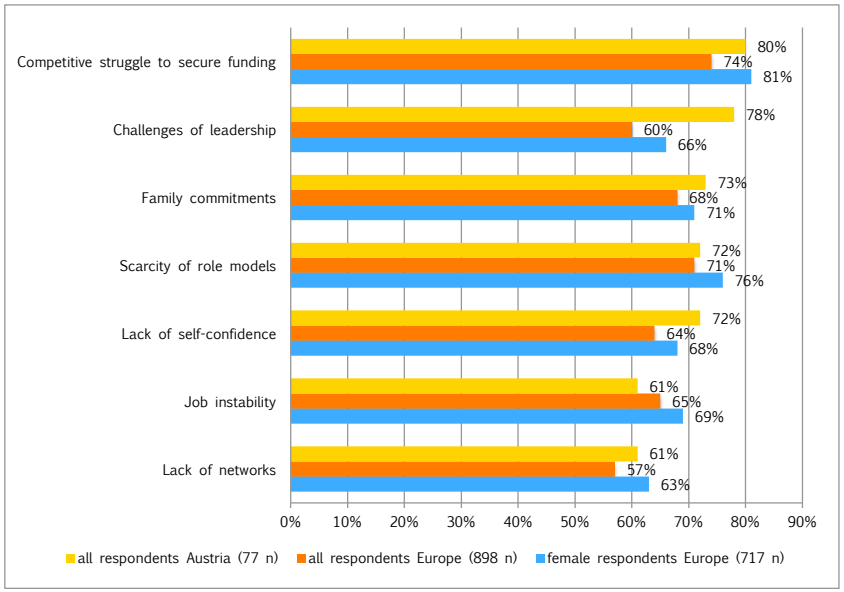
VII. The challenges faced by female directors

7.1 What factors discourage women?

In Austria most respondents (80%) indicate that the *Competitive struggle to secure funding* discourages women from directing. Both all European respondents and all European female respondents agree and indicate this factor the most.

The second most important factor discouraging women in the view of Austrian respondents is the *Challenges of leadership*. The same factor receives the highest value (85%) in Germany.

Figure 30: Austria vs. Europe vs. European women only: factors discouraging women from directing, respondents indicating both "applies fully" and "applies"



Source: EWA report database – Questionnaire

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Comments from Questionnaire

Respondents mention the *club of long-established old men* making it harder for women to establish themselves within the film industry. Women have to be better, louder and more efficient than men. Women being in the public eye are strongly criticised. Some refer to the absence of other female colleagues and competitors and the absence of female producers. Another respondent indicates that the situation for young female directors and their first films is encouraging but for those older than 35, especially those with children, increasingly inadequate.

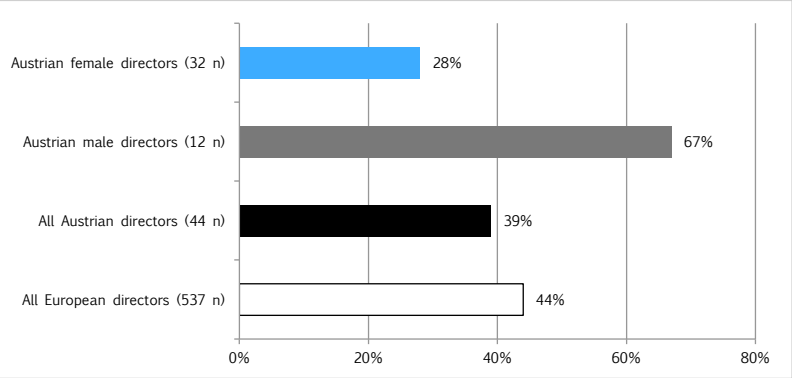
Recommendations

Offering incentives to encourage producers to present more projects with female directors could result in getting those projects out of the ghetto.

7.2 What is the impact of being a parent?

Almost two thirds of the male directors (67%) indicate that they are parents, only almost one third of female directors (28%) indicate the same.

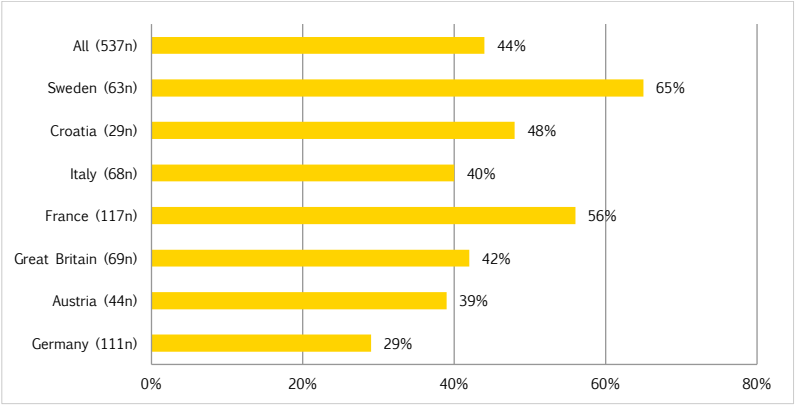
Figure 31: Austria: Are you a parent? Directors only, indicating "yes"



Source: EWA report database – Questionnaire
Note: n = number of respondents

In Sweden with 65% almost two thirds of responding directors are parents. In the European context the share of parenting directors is only lower in Germany (29%) than in Austria (39%).

Figure 32: Europe: Are you a parent? Directors only, indicating "yes"



Source: EWA report database – Questionnaire
Note: n = number of respondents

The European comparison shows that Austrian directors (35%) rank among those feeling more discouraged from filmmaking due to their parenthood next to Swedish (34%) and British directors (45%). Nevertheless with 65% the majority of Austrian parenting directors think that parenting does not influence their direction work negatively. In Europe this perception is even stronger with three out of four European directors (72%) stating that parenting is not a discouraging factor.

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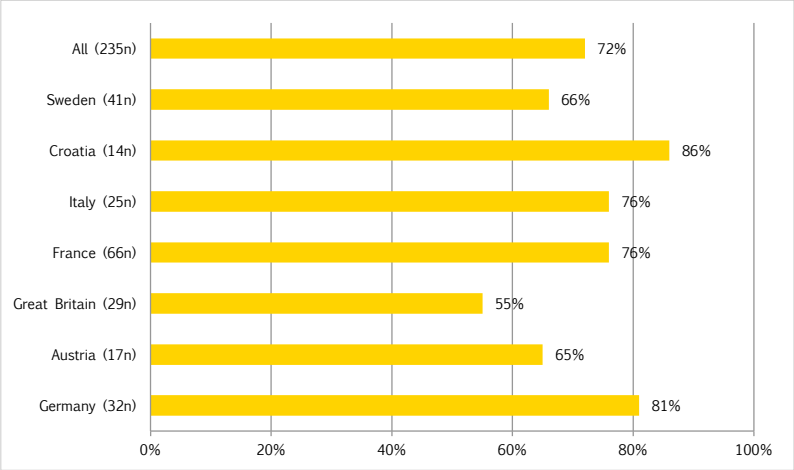
Figure 33: Europe: If yes, has being a parent discouraged you from directing films? Only directors that are parents indicating "applies less" and "does not apply at all"



Source: EWA report database – Questionnaire
Note: n = number of parent directors responding

Recommendations

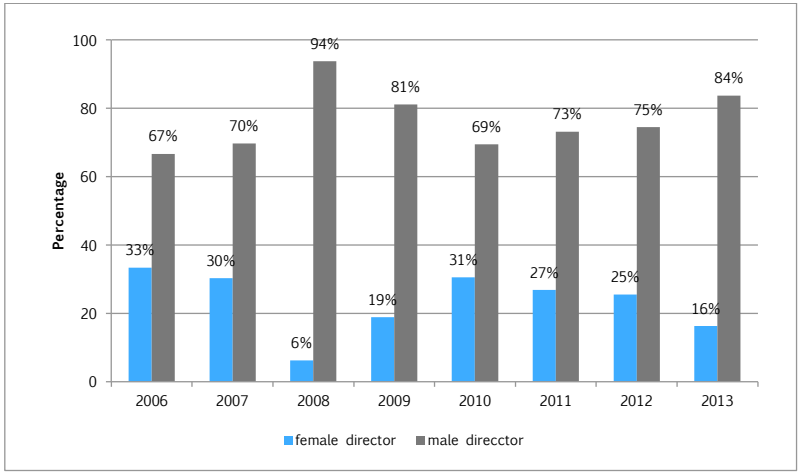
Even though parenting does not in principle have a negative influence on the work of film directors, offering better childcare adjusted to the needs of directors, and funding programmes that are adapted to the specifics of female CVs could be a possibility to keep women as directors in the audiovisual sector.

VIII. Releases

8.1 Share of all Austrian releases

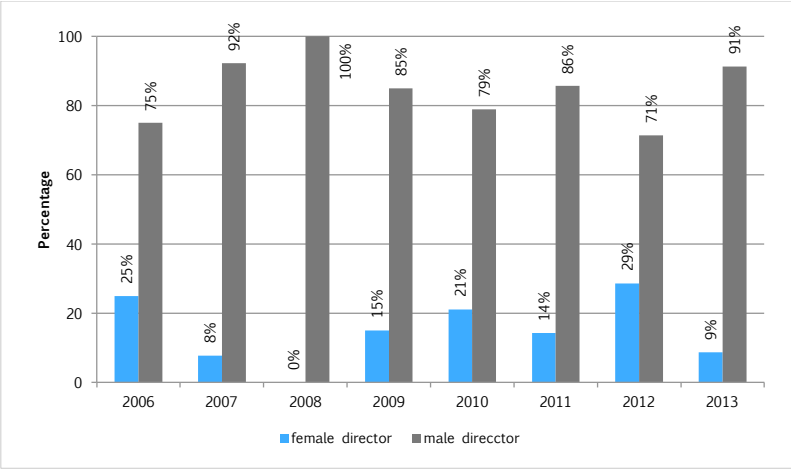
This section comprises all Austrian films released in a year not only those which have received production funding payments from national funders as in chapter 5. Female directors' share of all releases averages 23.5 % between 2006 and 2013. The share for female-directed fiction releases is low (15.1%) but there has been a progression across the two 4 year periods with a 5.8 percentage point increase whilst the higher share of female documentary releases of around 33% stays the same in both 4 year periods.

Figure 34: All Austrian film releases



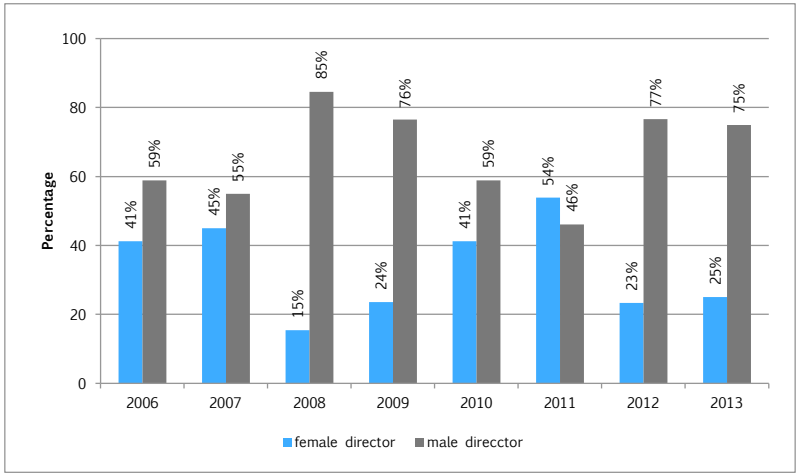
Source: EWA report database - Survey

Figure 35: Austrian fiction film releases



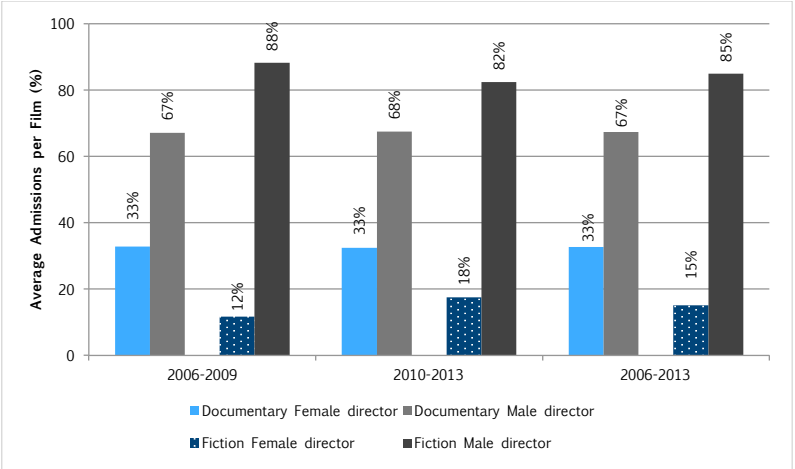
Source: EWA report database - Survey

Figure 36: Austrian documentary film releases



Source: EWA report database - Survey

Figure 37: Progression of Austrian film release shares by genre



Source: EWA report database - Survey

8.2 Are people aware of women's low share of film releases in Austria?

Almost two thirds of respondents, 63%, reckon that films directed by women form less than 20% of all Austrian films released. The European average is only a little higher with 66% of respondents thinking female-directed releases were this low. Respondents were not asked to differentiate between documentary and fiction films. As chapter 8.1 indicates Austrian reality is slightly better than most respondents' perception: 23.5% of all Austrian cinema film releases have a female director. In terms of fiction film releases respondents' assessment is correct as only 15.1% have a female director.

On the share of female directed films amongst all European films released, there was less confidence with 68% of the respondents indicating that women's share would be less than 20%. This was almost in line with the European average of 64%.

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IX. Awards and critical reception

In this section all 43 Austrian documentary and fictional feature films of the cinema release year 2013 were analysed according to gender of director, number of international awards and festival participations associated with the film.

Data was mainly taken from the website of the *Austrian Film Commission* supervising most Austrian films for a certain period of time (often approximately two years) at international film festivals. The *Austrian Film Commission* provides no festival or award information about films that have a world distributor or which are supervised by other Austrian distributors such as *Sixpackfilm.*

Due to difficulties in the availability of data referring to national festival participations and the reception of national film awards the gender specific success of Austrian films within Austria could not be collected for this report.

In Austria 71% of all female-directed films of the cinema release year 2013 got invited to participate in an international film festival while only 56% of all male-directed films of the same year got invited. 43% of all female-directed films in 2013 won an international award whereas only 19% of all male-directed films received an award in that year.

Both Austrian and European[18] films with female directors are more likely to win awards and get invitations to participate in film festivals. This evidence of critical success undermines claims about quality used to justify female directors' significant underrepresentation at A-list festivals.

[18] Europe stands here for the participating countries Austria, Croatia, France, Germany, Italy, Sweden, UK

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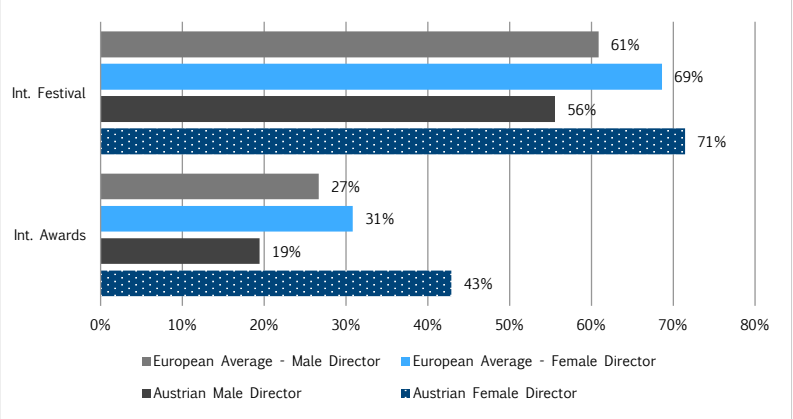
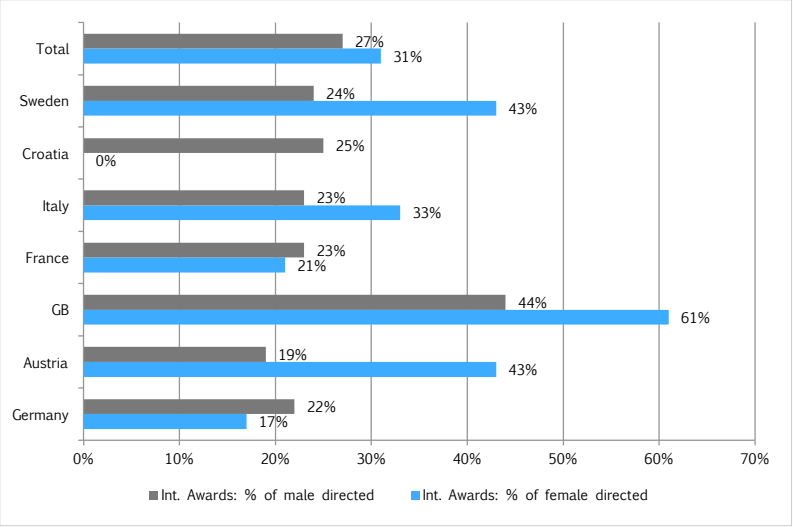
Figure 38: Austria vs. Europe: Awards and festivals by gender of director



Source: EWA report database – Festivals and Awards

Figure 39: Europe: International awards in 2013



Source: EWA report database – Festivals and Awards

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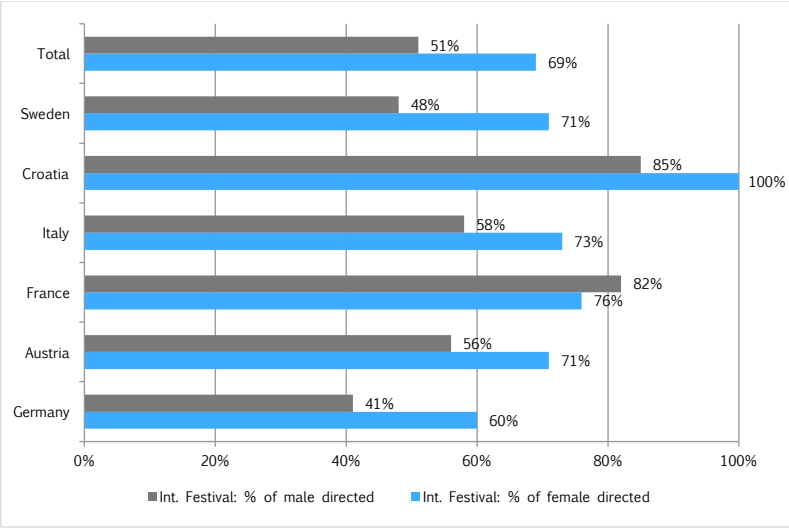
Figure 40: Europe: International festival participations in 2013



Source: EWA report database – Festivals and Awards

Recommendations

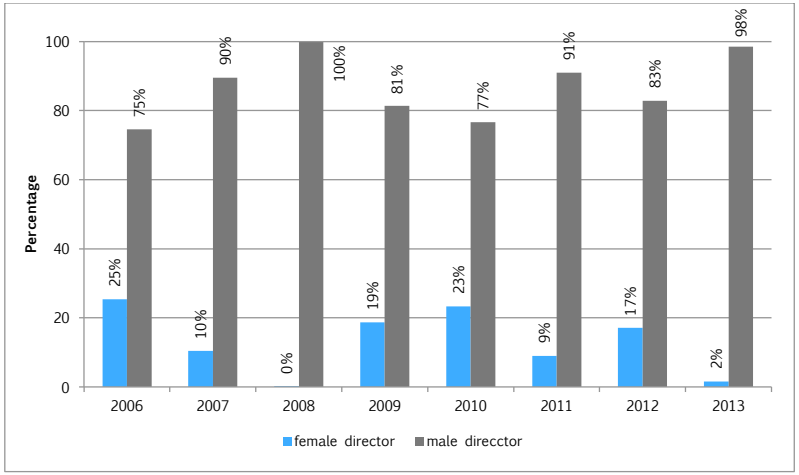
As films with female directors perform better at festivals than films directed by men but men are getting the more prestigious festivals and prizes, it is a necessity to make all festivals including A-list festivals aware of the quality of female directed films.

X. Admissions

10.1 Share of all Austrian admissions

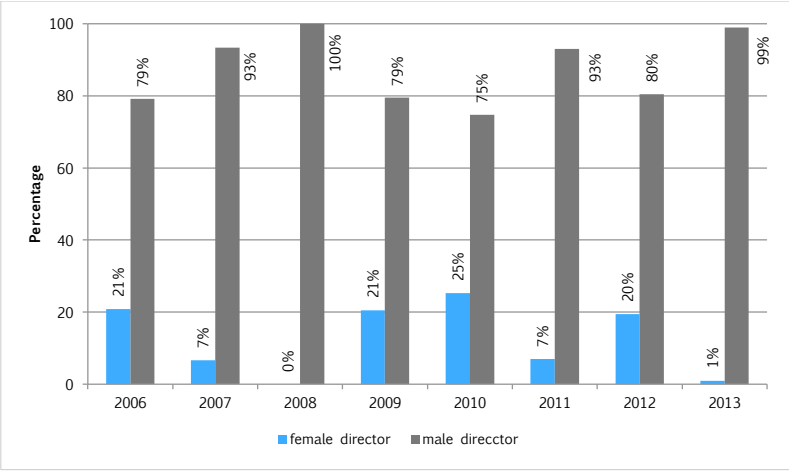
The share of admissions for all Austrian films with a female director has varied considerably from year to year in both genres averaging 12.5% for all national films between 2006 and 2013. The average share for fiction admissions is with 12.8% slightly higher than the average share of female documentary admissions of 11.7%.

Figure 41: Share of number of admissions for all national films



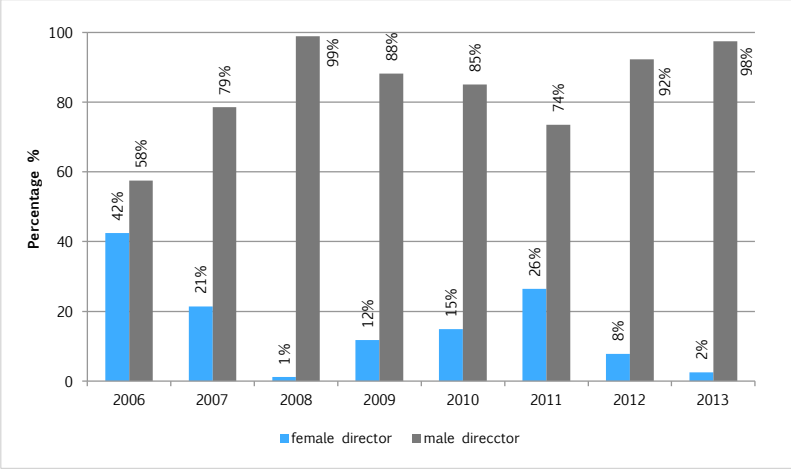
Source: EWA report database - Survey

Figure 42: Share of number of admissions for national fiction films



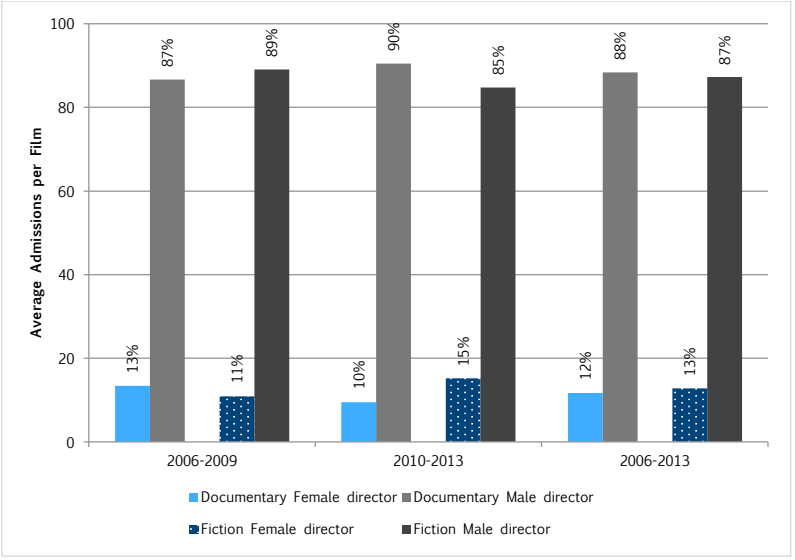
Source: EWA report database - Survey

Figure 43: Share of number of admissions for national documentary films



Source: EWA report database - Survey

Figure 44: Progression of admission shares by film genre



Source: EWA report database - Survey

10.2 Average number of admissions

Admissions for female-directed films vary greatly from year to year as there are not many films by women on screen. Therefore average admission numbers depend a lot on every single film release. In the years 2009 and 2010 the average number of admissions per released fiction film with a female director exceeds the male average by 46.3% in 2009 and 26.7% in 2010. In other years like 2008 and 2013 the average number of admissions from films with a female director is close to zero. Still over the observed period the overall average admission number per female-directed film is almost as high as the average admission number for a male-directed film.

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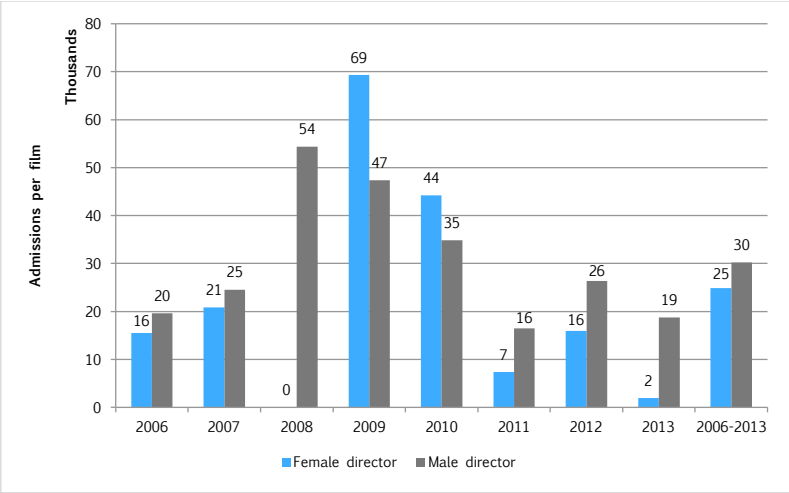
Figure 45: Average number of admissions per fiction film release



Source: EWA report database - Survey

In 2006 the average number of admissions per released documentary film with a female director exceeds the male average by 5.6%. The overall average number of admissions over the period 2006-2013 shows a gender gap for documentaries with male admission numbers exceeding the female average by 72.8%.

The average budgets of chapter 5.3 show that female-directed films have significantly smaller average budgets than male directed films. The 8 most expensive films with a cinema release within the period 2009 to 2013 have budgets ranging from 7.6 to 16 million euros. None of these films is directed by a woman. In contrast the 8 highest budgets of female-directed films within the same period range from 1 to 5.1 million euros. Smaller budgets result in less marketing and less admission numbers. In Austria this tendency might be reinforced by the fact that Austrian film distributors are mostly male.

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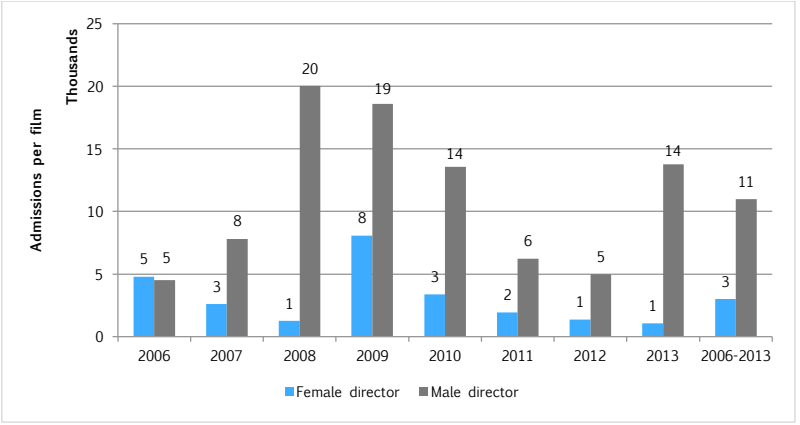
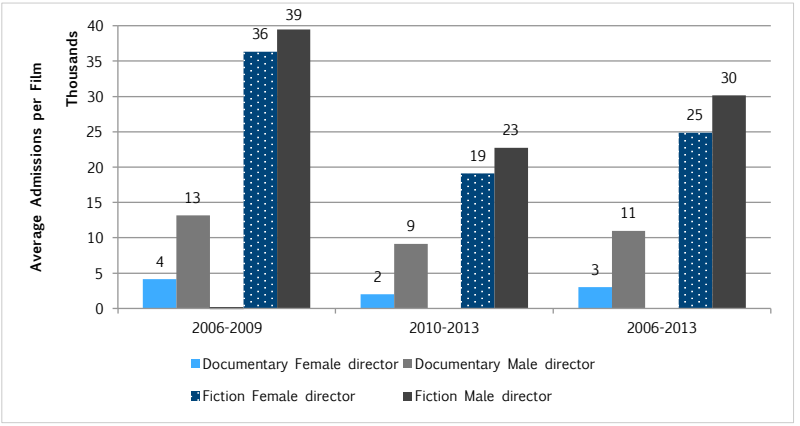
Figure 46: Average number of admissions per documentary film release



Source: EWA report database - Survey

The comparison between the two four-years periods shows a decline in audience numbers for both female and male-directed films in both genres.

Figure 47: Progression of average number of admissions per film by genre



Source: EWA report database - Survey

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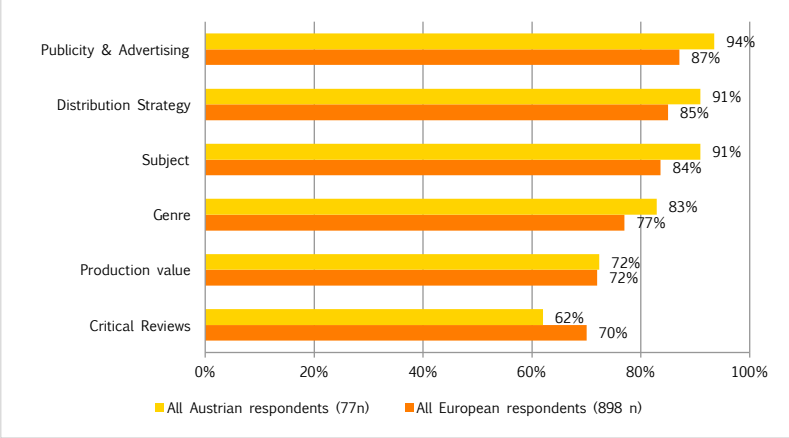
10.3 What affects box-office performance?

Publicity & Advertising is the most important factor affecting box office performance according to the perception of all Austrian respondents. 94% of them assessed this factor as *very important* (73%) or *important* (21%). For 91% of all Austrian respondents both *Distribution Strategy* and *Subject* is the second most important factor.

Figure 48: Austria vs. Europe: What affects box office performance? Respondents indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: n = number of respondents

While most female respondents indicate Publicity & Advertising, most male respondents consider a film's Subject as important factor affecting box office.

The Austrian film distributors currently show little awareness of the potential of films directed by women in terms of addressing new target groups. They do not consider the fact of a female director worth being advertised specifically as a benefit for the target moviegoer. This goes together with the lack of female distributors in Austria.

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Comments from Questionnaire

Respondents indicate that the prominence of a film's cast and director, its positioning and marketing are crucial in terms of box office success. It is also stated that critics are mostly male.

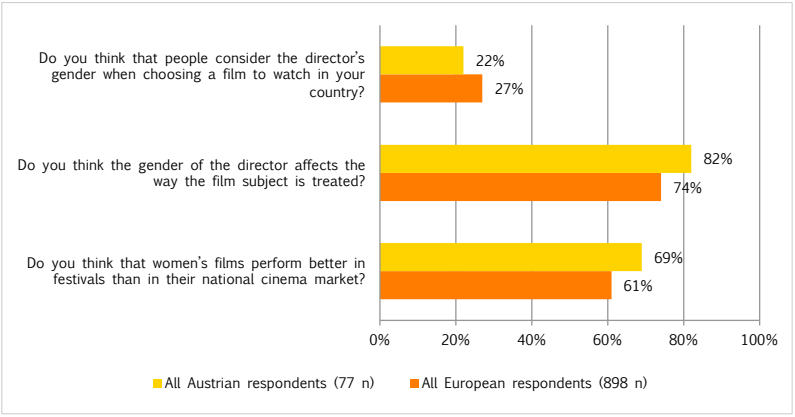
Recommendations

To achieve a more specified promotion for female directors focusing on a more specific target group, incentives for distributors to distribute films from female directors are needed as much as incentives for women to become film distributors.

10.4 Did the gender of the director affect the choice of a film?

22% of all Austrian respondents considered this to be significant, although more, 82% recognised that the gender of the director would affect the way a story was told. Within the European context Austria ranks among highest values only behind Italy with 89% and above the European respondents' share of 74%.

Figure 49: Austria vs. Europe: Role of gender, respondents indicating "applies fully" and "applies"



Source: EWA report database – Questionnaire

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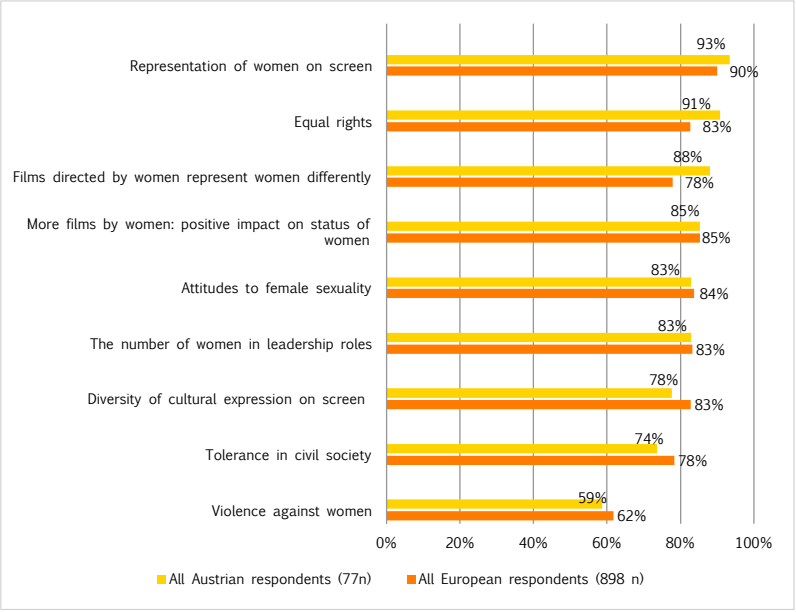
XI. The social impact of more films directed by women

Respondents were asked to consider a range of ways in which increasing the numbers of films directed by women might impact on social culture and practice in Austria. At least almost three quarters of both Austrian and European respondents believe that all suggested impacts apply – with the exception of *Violence against women* with only 59% of Austrian and 62% of European respondents.

Most Austrian respondents, 93%, felt more films directed by women would change the *representation of women on the screen*, followed by 91% considering *equal rights* as an impact and 88% indicating that *films directed by women represent women differently*. Most European respondents agree with Austrian respondents and indicate *Representation of women on screen* as the most applicable impact of more films directed by women.

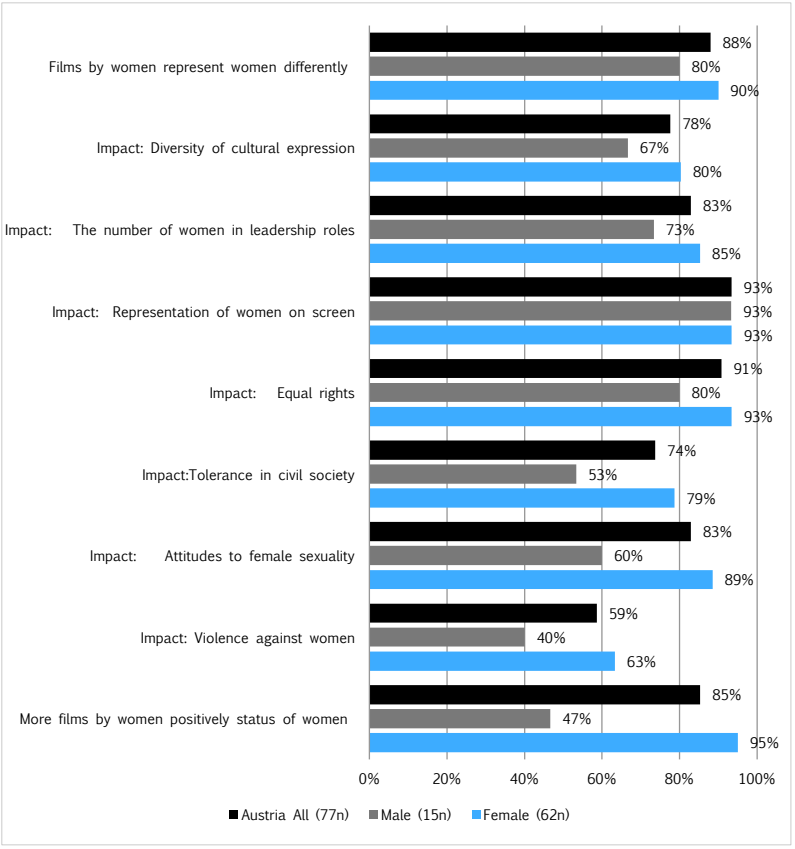
Figure 50: Austria vs. Europe: Films by women have an impact on (…), respondents indicating "applies fully" and "applies"



Source: EWA report database – Questionnaire

Opinions of male and female respondents diverge significantly for some of the suggested changes that might result from more films directed by women. Female and male respondents agree the most in the statement that *Films directed by women represent women differently to films directed by men*. Indications of female and male respondents diverge most for the assumption *if more films were directed by women this would impact positively on the status of women.*

Figure 51: Austria: Films by women have an impact on (…), diverging opinions of male and female respondents indicating "applies fully" and "applies"



Source: EWA report database – Questionnaire

XII. Changing the picture – Policies for change

12.1 Existing measures for gender equality in the industry

The *Austrian Film Institute* has already established two measures to increase the number of female producers, to provide the setup/strengthening of a network and in further consequence the creation of role models: In 2015 the *ProPro*-workshop, a one-week workshop for female producers exclusively, took place successfully and is to be continued in 2016. Another measure is the subsidy for women participating in the post-graduate production course *MBA Film, TV and Digital Media Management.*

The *Austrian Film Institute* is trying to meet the claim for gender equality in its policy and through the gender equality-commitment of the selection committee.

Further it aims to establish gender equality-classes for the members of the selection committee in order to raise their awareness for the subject and to teach how to read female stories and scripts and how to deal with them.

Selection Committee members are given the result of the *Bechdel* Test done for female and for male characters within the feature film scripts.

In 2016 a competition will be launched to find the best scripts with interesting multilayered female characters.

12.2 Preparing the ground in school education

In our respondent demographics most, 90%, had decided to become a director after the age of 11, and almost all, 93%, had made their first film after the age of 11.

In response to a summary of options for secondary education, 93% of the Austrian respondents felt that it was important to focus on film education in school and 97% supported the role of *film clubs* in encouraging girls to take up directing. 97% of Austrian respondents also considered it important to offer *media literacy as part of the curriculum.* All other measures were given substantial support with the link between participation in drama productions being given least significance. In general the Austrian response was slightly more affirmative than the average European response in all cases except *children's drama productions.*

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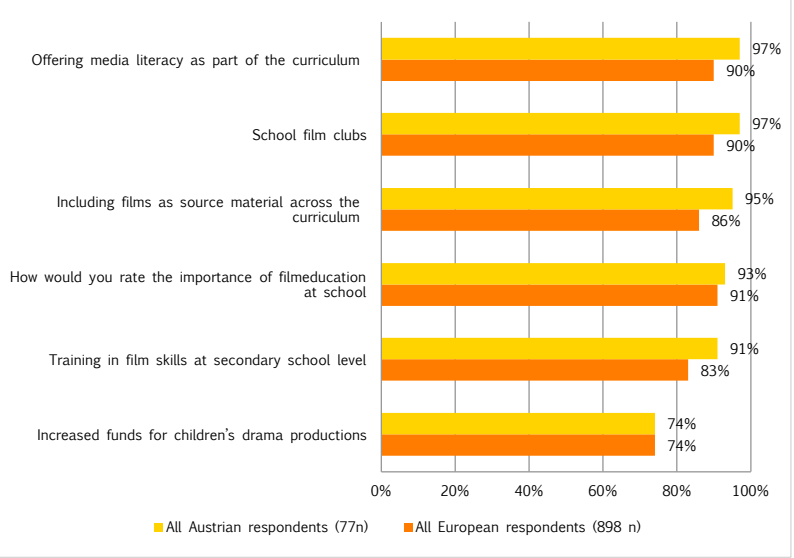
Figure 52: Austria vs. Europe: Importance of film education, respondents indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: n = number of respondents

Comments from Questionnaire

Respondents claim that students should be taught gender inequality awareness and the critical reception of the media. The presentation of film classics and female role models is mentioned as well. Some recommend a better representation of female directors in public and indicate that the public fails to make a star out of a female director.

Recommendations

Film literacy is not a topic in today's Austrian school system, it has not found its place within artistic subjects like *Music* or *Arts* although it is of vital importance to create awareness for its impact as a creator of role models, to teach critical reception as well as how to "read" a film.

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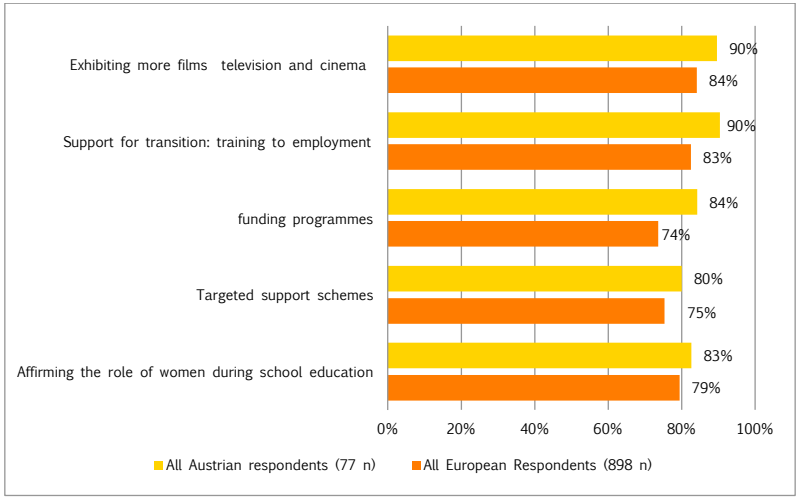
12.3 Measures to encourage women directors into the industry

Several measures to encourage women to become directors were presented to respondents. Austria's average affirmative response was higher in each case than averages reflected by all other European countries. *Exhibiting more films directed by women* had the greatest support, 90% considering it important, but measures to affirm women's presence at every stage of their early careers – in education, in their transition from training into their careers, and in developing more film projects were all equally strongly affirmed.

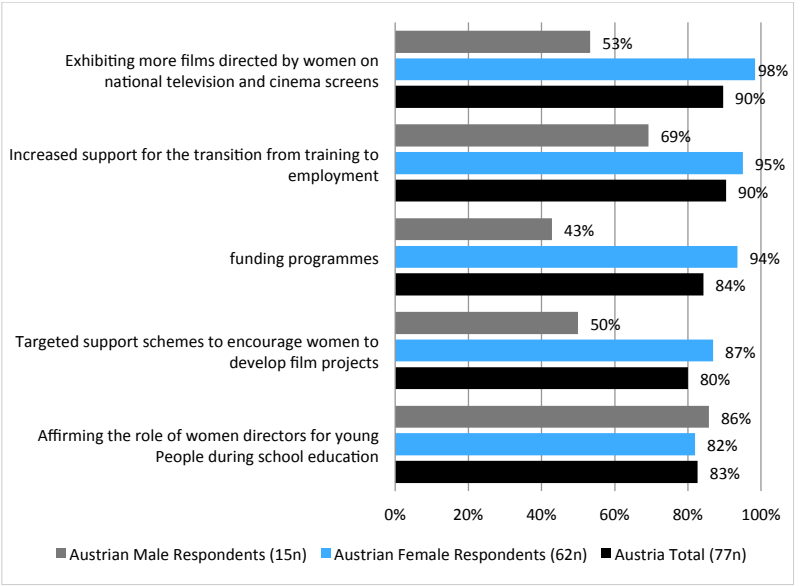
Figure 53: Austria vs. Europe: Factors encouraging women to direct, respondents indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: n = number of respondents

Differences between female and male indications again are high in this section. Male respondents most often assessed *funding programmes* as an encouraging factor as *less important* while most female respondents consider them as *very important*. Same differences in female and male opinions have to be stated for the importance of *exhibiting more films directed by women on television and in cinema* and *Targeted support schemes to encourage women to develop film projects.*

Figure 54: Austria: Encouraging factors, diverging opinions of male and female respondents indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: n = number of respondents

Comments from Questionnaire

Respondents often mention a quota for the awarding of funding to incentivize production companies to work with female directors. They demand more female producers and equal production budgets for both female and male-directed films. Also mentioned are fair wages due to increasing wage dumping within the industry, attracting especially young males and the claim for more female role models in *Filmakademie* and in secondary schools through programmes focusing on films with strong female figures.

Recommendations

TV-stations should be encouraged or – talking about public channels - obliged to broadcast more programmes directed by women; incentives for distributors who distribute films directed by women could be an asset as well.

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12.4 Policies to sustain women's careers in the film industry

EWA presented a range of policy measures to canvass respondents' reaction. *Targeted development funding* (90%), *targeted production funding* (86%), *Greater equality in policy-making committees* (86%)[19] and *increased support for first and second films* (86%) were considered most important for Austrian respondents. With the exception of *Setting up a database of women directors* each suggested policy measure was perceived as important for at least 74% of Austrian respondents and 69% of European respondents.

For most European respondents *Greater equality of representation in policy-making committees* was indicated as important.

[19] The share of men in the supervisory board of the Austrian Film Institute is a long way from 50/50. Currently out of 12 members only 3 are women (25%)

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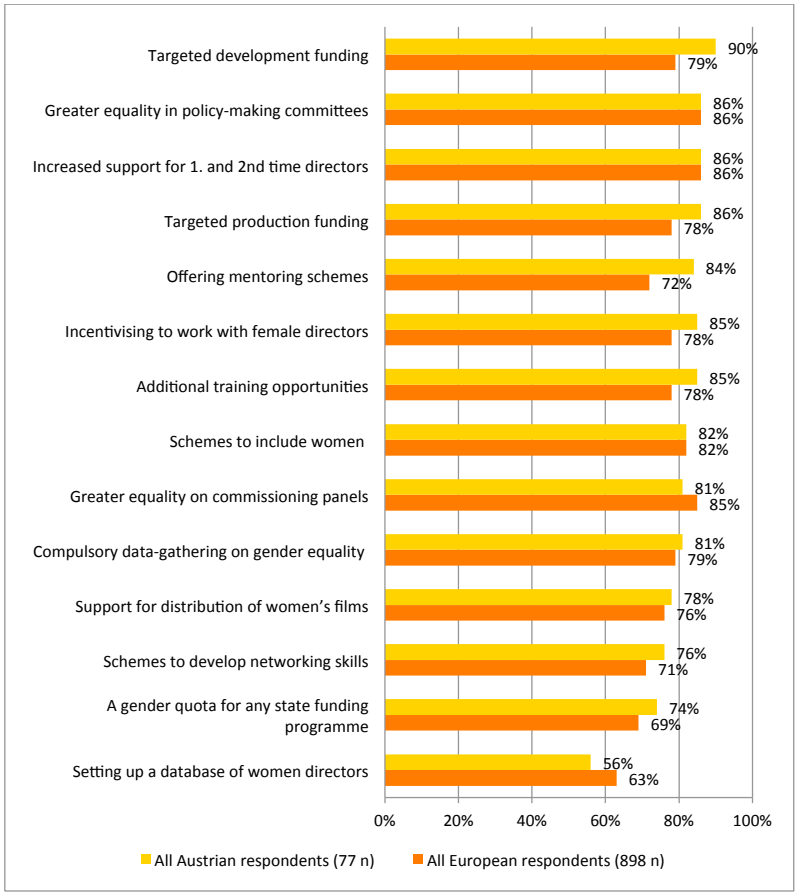
Figure 55: Austria vs. Europe: Policy measures, respondents indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: n = number of respondents

Comparing the European average of all respondents with the average of all European female respondents a consistent increase of values is to be stated, due to the exclusion of male respondents and their significantly different assessment of policy measures as the chart *Diverging opinions of female and male respondents* shows.

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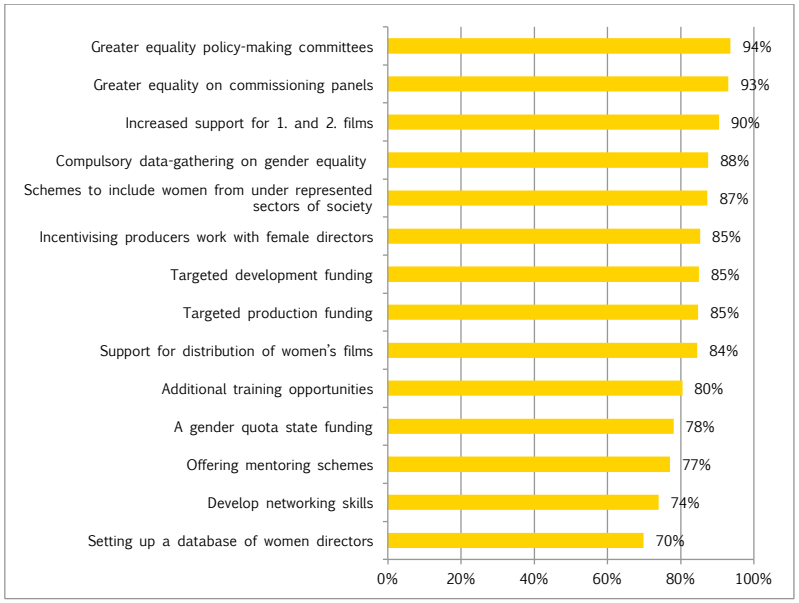
Figure 56: Europe: Policy measures, women only, indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: on the basis of 717 women responding

Female and male opinions diverge most in their assessment of the importance of a *gender quota for any state-funding programme* and in terms of *support for distribution of women's films.*

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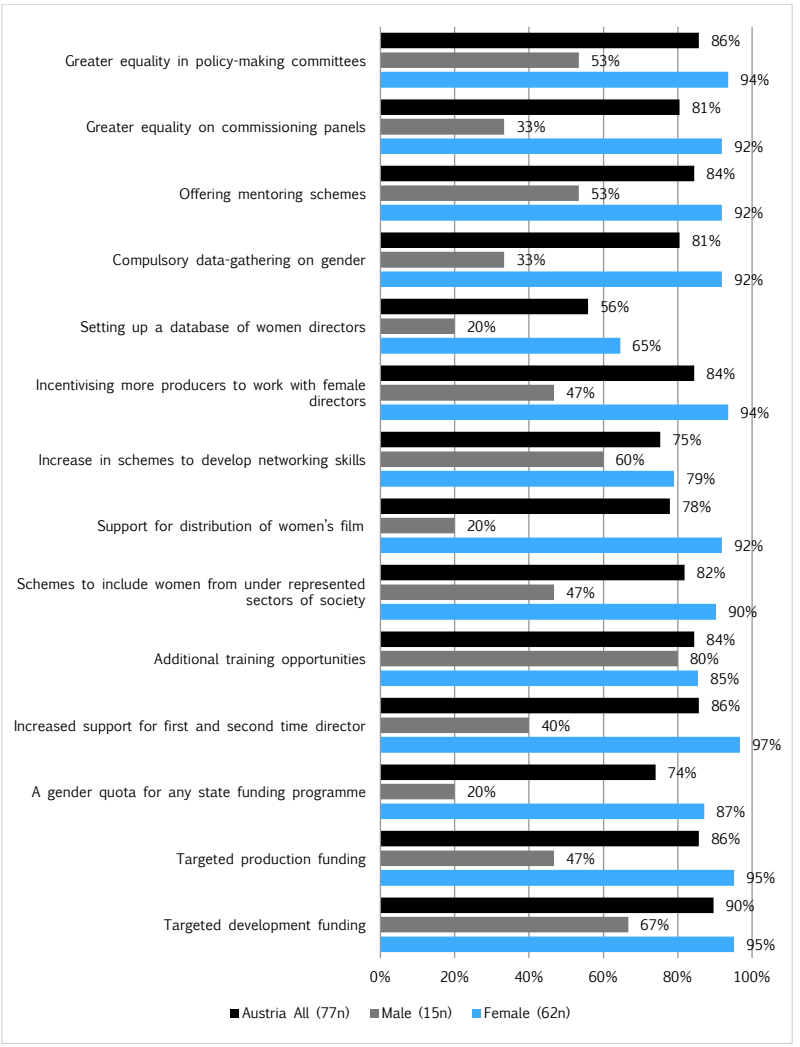
Figure 57: Austria: Policy measures, diverging opinions of female and male respondents indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: n = number of respondents

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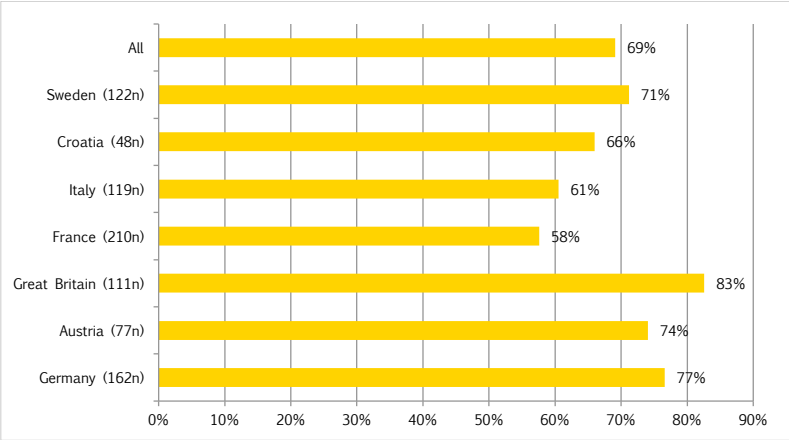
Nevertheless three out of four Austrian respondents consider *a gender quota for any state funding programme* as an important policy measure.

Figure 58: Europe: Policy measures " A gender quota state funding", women and men indicating "very important" and "important"



Source: EWA report database – Questionnaire
Note: n = number of respondents

Comments from Questionnaire

Respondents recommend reducing the influence of the producers' guild in Austria and therefore the exclusion of producers from supervisory and executive boards due to the assumption that the producers' self-interest policy damages female directors' interests. Respondents demand public submissions for leading positions and a gender-equality-commitment from state cultural policy authorities. Responding parents recommend shorter shooting days and gender equality in childcare.

APPENDIX II

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CROATIA

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Introduction

This report is one of seven from countries participating in the research project set up by the European Women's Audiovisual Network, *Where are all the women directors in Europe?* : Austria, Croatia, France, Germany, Italy, Sweden and the UK. The report has come about in response to growing outrage at the marginalisation of female directors in world film culture and the belief that our societies benefit from inclusion and diversity of voices.

This report sets out to contribute to the evidence based research necessary to bring about change and sustain gender parity in the Croatian film and audiovisual industry.

Out of the seven European countries covered by the EWA research, Croatia is by far the smallest – in terms of the total population, which is only 4.2 million, with the lowest GDP and level of audiovisual production. But, it shares a common thing with its six European counterparts: women comprise more than 50% of the overall population and 46% of people in employment (i.e. taxpayers).

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I. Summary and recommendations

The greatest problem for Croatian female directors is and will continue to be sustaining their careers in a competitive environment where there is a huge amount of pressure on public funding, which is distributed solely through the national film fund, Croatian Audiovisual Centre. The shift towards greater gender parity in public funding that can be observed from 2008 onwards is mainly the result of the statutory support for first-time directors introduced in 2008. It still remains to be seen how this shift will translate into a long-term gender equality in public funding when female first-time directors start applying for funding for their second or third features.

Statistics on gender equality to give a comparative and comprehensive understanding of what is happening across the Croatian audiovisual industry exist almost exclusively for the film sector and mostly in the form of raw data, gathered by the national film fund, the Croatian Audiovisual Centre. The usable data for broadcasting industry is non-existent and if it exists at all, it is patchy and not specific enough and hidden in other gender non-specific data.

Where the data does exist, as in case of the national film fund HAVC, there is for the time being little evidence that it is being monitored or structured into coherent, institution-led policies for either change or sustainability of positive trends.

The major shift towards gender parity that happened from 2008 was mainly the result of the introduction of the statutory funding for first-time filmmakers – all feature films funded by the Centre and directed by women, were debut features, with one exception. So, whilst a change that happened since 2008 should be noted and fully acknowledged, it is equally important that a coherent, institution-led policy on gender parity should be put in place at least at the level of the national public funder, to ensure that the positive and break-through results achieved in the last 7 years since the founding of the national film body have an adequate follow-up.

When talking about the coherent gender statistics and evidence-based policy initiatives regarding gender parity at national level in Croatia, it should be emphasised that they should not only be based on the national film fund statistics, but as well the gender statistics of the public and private broadcasting sector, which are lacking at the moment.

Only then will we have a basis to come to a better and more precise understanding of the complex factors affecting gender equality, both in the

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commissioning process, and in finding the audience for female-directed films and audiovisual works in Croatia.

1.1 Education and entry

76% of Croatian respondents learned the skills to become a director at film school. A percentage was slightly higher in case of men (82%) then in case of women (72%). It was followed by: learning by doing (34% for both men and women) and through internship/apprenticeship (28% for both men and women).

Apart from attending film school (84%) the principle entry points into industry for women directors in Croatia are: making shorts (90%) and documentaries (81%).

It is worth noting that this particular question was among several questions which invited respondents to select more than one option, so not only the results do not always add up to 100%, they can be quite misleading in terms of chronology and hierarchy of routes into directing (defined as directing of feature-length fiction and/or documentary films for the purposes of the EWA study), as they overlap.

It can be said that in Croatia, the traditional chronological route into directing feature-length fiction films is almost invariably: film school education first (not necessarily a directing course), then directing shorts or documentaries.

Based on the answers to the questionnaire, men make up their mind about a directing career at an earlier age. None of the female respondents decided to become a director at the age younger than 11, compared with 36% of men. The approximate age when respondents made their first film was 23 in case of women and 20 in case of men.

Though it was impossible to gather comprehensive data from the Academy of Dramatic Art (ADU), the main film school in the country as to the number of applicants for directing courses for the period of 2010-2013, except for one particular year: academic year 2012/2013, where 39 applied for the BA course and 5 were admitted, it can be surmised that every academic year the number of applicants for directing courses far exceeds places offered at the film school. Also, the fact that in the years covered by the study and years for which the data of students attending and students graduating was available, there was a change in the system: from 4-year graduate course to three-year BA and two-year MA courses, further complicates the analysis. But on the basis of the available data there has been a two thirds/one third split in favour of men over women in terms of students

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taken on to film courses. Women constitute a slightly higher proportion of recent graduates from these courses, but are still some way off parity with men.

The Croatian respondents, in line with their European counterparts, think that offering media literacy as a part of the curriculum, including films as source material across the curriculum, training in film skills at secondary school level, in school film clubs, as well as the number of female directed films included in the curriculum, and affirming women's role in media literacy at school would help prepare more girls to take on the career in directing.

1.2 Funding

In public funding for film production through the Croatian Audiovisual Centre, female directors are still under-represented despite the change for the better that has happened since the Croatian Audiovisual Centre was founded in January 2008.

Prior to 2008 in the 18 year period since the independence of Croatia out of 105 feature fiction films that received public funding and were released theatrically, only 5 were directed by women.

Still, despite this, the overall pattern shows very large fluctuations which given the low starting point can lead to years with no production funding allocated to female directors. This is especially true for fiction and to applies to lesser extent to documentary funding. Analysis of the HAVC production funding in years 2008-2013 indicates that for fiction there were years when awards for women were low or non-existent.

In terms of the amount of production funding awarded by the Croatian Audiovisual Centre (HAVC) it is worth noting that it is not so much a gender disparity but disparity in funding in between first features and the rest (second, third, fourth features, etc) that impacts on the gender split in the amount of funding, because all Croatian films directed by women and supported by the national film fund in between 2008-2013 were debut features, with the exception of two films by two established female filmmakers.

Competing for funding is a key challenge women face, but in Croatia it is equally true for men, as there is a scarcity of funding sources available. Almost 100% of Croatian features (both fiction and documentaries) are funded first by the national film fund, the Croatian Audiovisual Centre.

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The female share of national funding for fiction films in the period 2008-2013 was 14.1%. As almost 100% of fiction films by female directors funded for production by the Centre in between 2008-2013 fall into a separate funding scheme: the debut features funding scheme, automatically allocated less funding regardless of the gender of the director, share of national funding for fiction films (2008-2013) calculated exclusively on the basis of amount of funding for all films supported in any given year does not give the whole of the picture.

If we take first features separately and look into the gender split a different picture emerges: 28% of all debut features funded in the five year period covered by this study were directed by women, with 32% of the overall funding for debut features allocated to the projects directed by female directors. If we were to include the year 2014 we would see a positive progression with 36% of all debut features funded directed by women with 44% of the overall funding allocated to films directed by women.

The situation is somewhat different in case of documentaries where there is no separate (lower budget) scheme for first-time filmmakers and where 27,6% of the overall funding for documentaries in the period 2008-2013 was allocated to female directors.

1.3 Reaching the audience

The number of female directed films released in Croatia is equal in relation to their percentage share of production, as all Croatian films produced are theatrically released. It is also worth noting that a higher number of films directed by men in the first years covered by this study are the result of the fact that prior to 2008, there were no films directed by women that were awarded production funding and the fact that there is at least two-year long gap in between the funding decision and the release of the film in the cinemas.

1.4 The way forward

The response to EWA's questionnaire on the social impact of increasing the number of female directed films was universal in feeling that it would change the way women are represented on screen, contribute to equal rights, and above all, lead to greater diversity on our screens.

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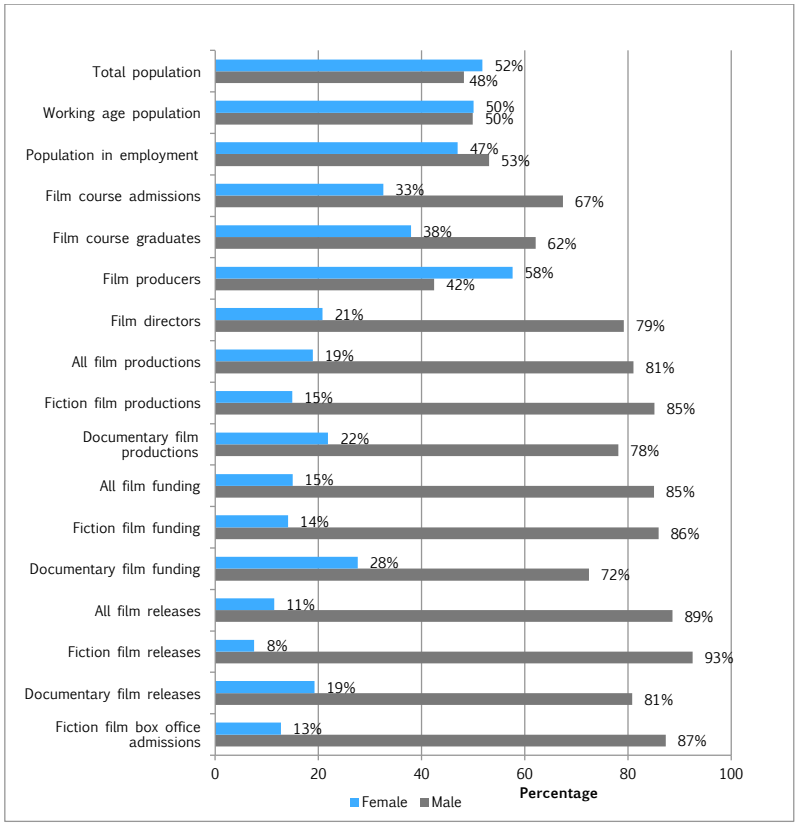
A very high percentage of the Croatian respondents to the on-line questionnaire think that in orienting girls towards directing, schools are still playing and should play a vital role and including gender perspectives in media literacy, increasing the number and profile of films by women directors both in the curriculum and in film clubs were seen as key strategies for the education sector.

1.5 Croatian film sector: gender shares across key indicators

Figure 1: Croatian film industry; gender shares across key indicators



Source: EWA report database – Survey
Base: Croatian Bureau of Statistics (DZS); Academy of Dramatic Art, Zagreb (ADU); Croatian Producers Association (HRUP); Croatian Film Directors' Guild (DHFR); Croatian Audiovisual Centre (HAVC)

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1.6 Recommendations for action

a. Data gathering

All education, commissioning and distribution institutions should make statistics gathering on gender equality a compulsory part of their programme. For film schools, training programmes and the national fund, these should include data on applicants and commissioning teams. For the national fund or any regional funds that may be set up in the future, these should include data on genre, budget and whether the applicant/beneficiary is a first time or second, third time director and on genre and budget level where relevant.

This data should also include development funding figures, as development funding, introduced in 2010 by the Croatian Audiovisual Centre has proven so far one of the most effective tools in working towards greater gender parity in production funding.

Monitoring and reporting should take place annually to inform strategies for development and to achieve targets.

The Croatian Audiovisual Centre's statistical yearbook "Facts and Figures" which has been published annually since 2013 (with data for 2012) should from 2016 onwards include statistics on gender for all categories and funding programmes.

Croatian broadcasting regulator Agency for Electronic Media (AEM) should require all broadcasters with a public service remit to submit and make public statistics on gender equality in relation to commissions and acquisitions both for in-house and independents.

b. Production funding

Minimum 40% targets should be set for all public funding, whether from the Croatian Audiovisual Centre or public service broadcasting, to be achieved by 2020. Appropriate structures should be put in place to monitor progress. This will incentivise change and support female directors in sustaining their careers.

Gender equality should be observed on all commissioning panels and training provided to raise awareness of gender equality issues.

Vigilance over commissioning trends is especially necessary given the erratic figures from year to year, and the fragility of recovery for female directors where it exists.

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Strategies should be reviewed with regard to giving greater support for publicity and advertising of Croatian films in general and to incentivise the distribution of national films, including films by female directors.

Croatian Audiovisual Centre should continue to play the key role in raising public profile of Croatian female filmmakers by continuing to publish biannual brochures highlighting the success of Croatian female directors, scriptwriters and producers, in line with previously published: "Cinderellas, Queens and Godmothers of Croatian film" (2013) and "Women in Croatian Film" (2015).

c. Further Research

As EWA study covers only fiction and documentary feature-length films and does not take into account short film production, which is extremely important for a country with a low level of audiovisual production such as Croatia, additional research should be carried out on the presence of women in those genres.

Also, it would be beneficial to conduct additional research into gender parity in development support as there is anecdotal evidence that this has been so far the most effective way in ensuring the gender parity in the production funding.

To address the scope of these recommendations in the systematic, coherent way necessary to address the national situation, a symposium should be held for key stakeholders to identify co-ordinated data gathering, awareness raising and targeted action.

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II. Methodology

The report's findings are based on two sources:

1) a quantitative survey with 16 categories giving available data on the presence of women directors and their films in the Croatian film industry from film school to exhibition.

2) a questionnaire, snowballed to almost 900 respondents in seven countries covered by the study, of which the Croatian respondents comprised 48, of which 66,7% women and 33,3% men.

Findings from both sources are presented alongside in this report to complement the emerging picture.

2.1 Quantitative survey

In the case of Croatia, the research covers the period 2008 – 2013, the only period for which comprehensive data exist, at least for the film sector.

The data covers documentary and fiction films of 60' and over, intended for theatrical release and/or released theatrically.
No information on gender equality was available for the broadcasting, both private and public, as such sets of data are not gathered at all.

The sole source of funding for Croatian theatrical films (both fiction and documentary which are the focus of this study) is the Croatian national film fund – the Croatian Audiovisual Centre (HAVC). The films supported for production by HAVC, may or may not benefit eventually from the broadcaster investment along the line, but it is fair to say that all the feature-length films produced and released in Croatia have benefited from support from the national film fund – be it development, production or completion support.

Although Croatia has a strong track-record in funding minority co-productions since 2010, for the purposes of this study/research and analysis only Croatian 100% nationally funded films and majority Croatian funded co-productions were taken into account.

In terms of funding, only production funding was considered and analysed and that on the basis of the year of the allocation/funding decision. In terms of admissions

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and box office only in those quantitative research sections relating to funding and the year of first release relating to admissions and box office.

The survey's statistics for funding and releases have been gathered from several sources: the Croatian Audiovisual Centre's records on funding, as well as its statistical yearbooks "Facts and Figures" for the years 2012-2013, from Competitive Weekly Reports filed by the Croatian distributors, from the Croatian Directors' Guild (DHFR), Croatian Producers' Association (HRUP), as well as Academy of Dramatic Art (ADU) records[1].

2.2 Qualitative questionnaire

In Croatia, the questionnaire was distributed on-line through professional organisations of the industry: Croatian Directors' Guild (DHFR), Croatian Producers' Association (HRUP) and Croatian Association of Film workers (HDFD) and Academy of Dramatic Art (ADU).

The number of respondents was 48, of which 32 women, and 16 men.

In Croatia, the relative gender balance in between respondents was the highest, among all 7 European countries covered by the research, except Sweden.

Of the 48 Croatian respondents the majority have experience in three creative roles: 65% described themselves as screenwriters, 60% as directors and 35% as producers. The high number of respondents describing themselves as screenwriters can be explained by the fact that the majority of Croatian directors (irrespective of gender) are writers/directors. The rest of respondents are spread across all other creative and technical roles in film such as cinematographers, editors, production designers, costume designers, animators, actors, as well as film funders, film students, academics, film experts and critics.

The average age was 43 for female respondents and 45 for male respondents, so most respondents were people with a considerable experience and track record in the industry.

Several questions invited respondents to select more than one option so results do not always add up to 100%

[1] The data has been analysed and processed by Sanja Ravlic, the national researcher for the Croatian Audiovisual Centre. Full data can be found on EWA's site

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Where respondents select on a 1-4 scale, results are based on applies fully and applies. Exceptions are noted.

European average in comparative charts denotes all 7 European countries covered by the research[2].

[2] The data has been analysed and processed by Rostock University's Institute for Media Research. Full data can be found on the EWA's site

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III. Women's Presence in the industry

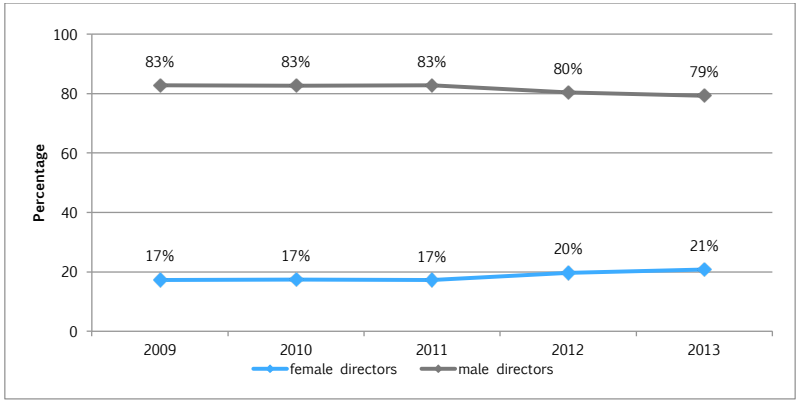
3.1 Does gender inequality exist?

In Croatia only 47% of respondents think that gender inequality exists for the directors in the national film industry, one of the lowest results amongst the 7 nations covered by this study: Austria, Croatia, France, Germany, Great Britain, Italy and Sweden.

3.2 Number of working directors

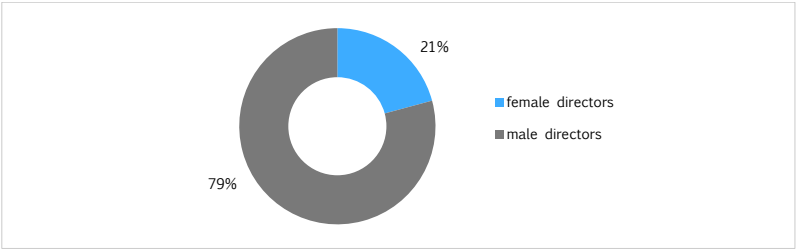
This is a difficult number to assess. The only relevant registry of directors available in Croatia is a registry of the members of The Croatian Directors' Guild (DHFR). The proportion of female film directors, members of the Croatian Directors' Guild increased slightly between 2006 and 2013, but they remain in the minority at just over 20 per cent.

Figure 2: Members of the Croatian Director's Guild



Source: EWA report database – Survey
Base: Croatian Directors' Guild (DHFR)

Figure 3: Members of the Croatian Directors Guild (2013)



Source: EWA report database – Survey
Base: Croatian Directors' Guild (DHFR)

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IV. Entry into the industry

4.1 How did you get your skills?

Of the 29 Croatian directors responding to the questionnaire 76% trained at film school, 21% had attended a training course, 28% claimed to have learned through apprenticeship or media schemes, while 34% were self-taught.

4.2 What was your route into directing?

Directors were asked which of a range of pathways were the most important routes into directing and offered a yes/no option. Most respondents considered making shorts, 90%, as the most important route with film school 85% and documentary film-making, 81%, in second and third place respectively. There was almost no difference in between female and male respondents in three most highly rated pathways into directing. The only significant discrepancy in between Croatian male and female respondents was in rating directing TV drama as a pathway into directing: female respondents rated it very lowly at 6% while male respondents rated it in the fourth place out of nine offered pathways, at 31%. This discrepancy could be indicative of the historical fact that TV drama produced in Croatia, either in-house or by the independents has been traditionally almost exclusively directed by men, and that female directors do not feel that directing TV drama, considered traditionally as the high-end TV production genre, is a pathway open to them. This underlines the importance of introducing gender monitoring in the Croatian broadcasting sector which is non-existent at the moment, as well as the necessity for broadcasters to review policies for gender equality and adopt action plans to include gender targets in commissioning.

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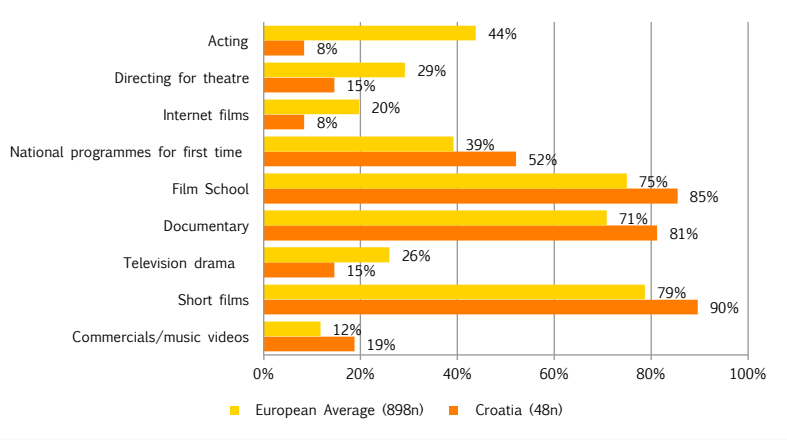
Figure 4: Routes into directing



Source: EWA report database - Questionnaire

4.3 Presence in film school

Figures were taken for students for all BA and MA Directing courses at the Academy of Dramatic Art, Zagreb (ADU) between 2010 and 2013, those being admitted to Directing courses and those graduating. Unfortunately, the figures for the previous years, before the introduction of the automated University admissions system were not available, and the figures of the total number of applicants for directing courses not at all, neither its gender split.

But the figures that were available show that in recent years there has been a two thirds/one third split in favour of males over females in terms of students taken on to film directing courses. And while women constitute a slightly higher proportion of recent graduates from these courses, they are still some way off parity with males. It should also be noted that in the years covered by the research (2010-2013) there has also been a change in the system of the studies, by which a traditional 4-year full-time course was replaced by 3-year full-time BA and 2-year full-time MA courses, which further complicates the comparative analysis.

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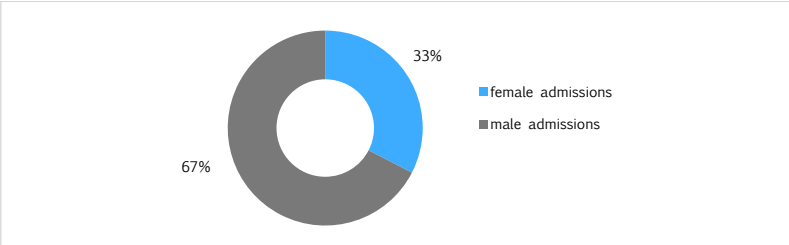
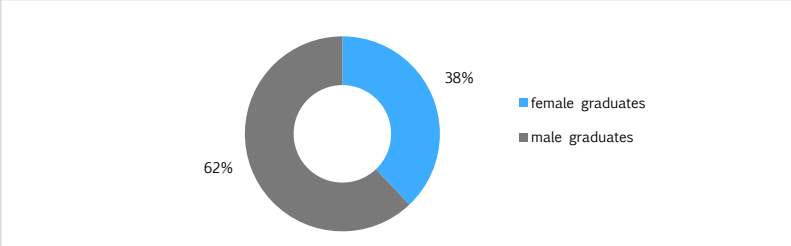
Figure 5: Film directing course admissions (2010-2013)



Source: EWA report database – Survey
Base: Academy of Dramatic Art, Zagreb (ADU)

Figure 6: Film directing course graduates (2010-2013)



Source: EWA report database – Survey
Base: Academy of Dramatic Art, Zagreb (ADU)

V. National funding

State funding for film production in Croatia is distributed almost exclusively through the Croatian Audiovisual Centre (HAVC), as there are no regional funds in the proper sense of the word, supporting productions through the whole of the value chain, except for a very limited development funding by some municipal funds for culture (city of Rijeka, city of Split, city of Zagreb).

5.1 Croatian audiovisual centre (HAVC) production funding – fiction & documentary

A lower share of national film funding has been allocated to productions with female directors, compared to their membership of Croatian Directors' Guild;

- A major proportion of national film funding is devoted to fiction features.
- Documentary productions with female directors take a considerably higher share of overall funding compared with fiction productions, though this still only amounts to around a quarter of the total, and generally involves much smaller budgets;
- This contrast is reflected in the different shares of productions with female or male directors released between 2008 and 2013;
- However, average admissions per released fiction film with a female director have been almost twice as many as for similar productions with male directors.
- Also, when we look at the targeted production funding (first features support) the female share of the number of projects supported between 2008 and 2013 is 28% and the share of the funding allocated 32%, which is double the gender share for both number of films and funding allocated for all fiction films.

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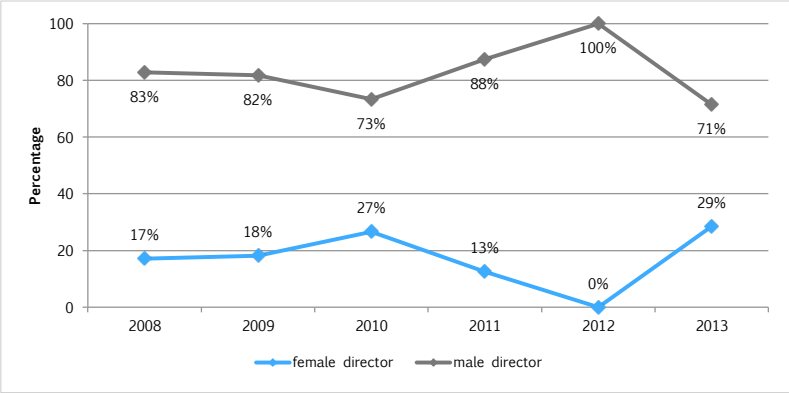
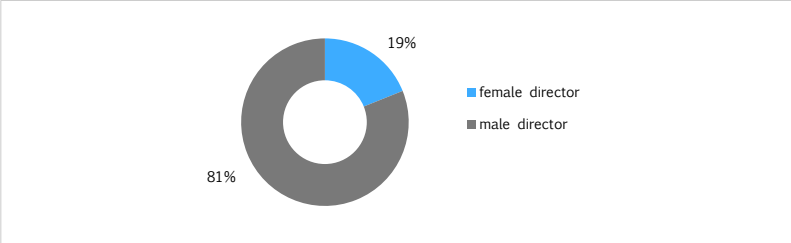
Figure 7: All film productions in receipt of national funding



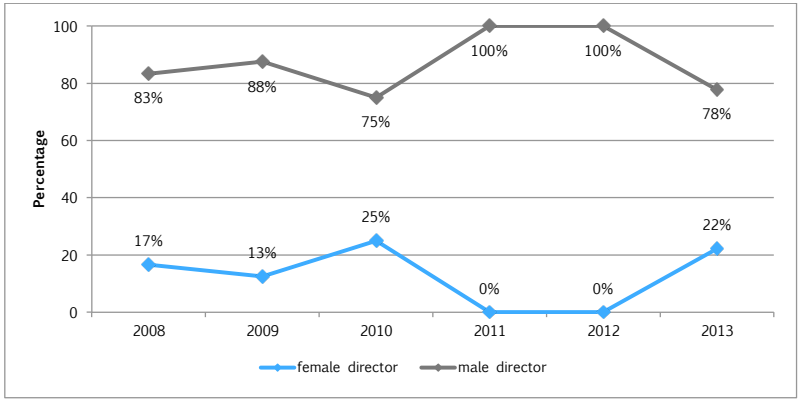
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 8: Share of all film productions in receipt of national funding (2008-2013)



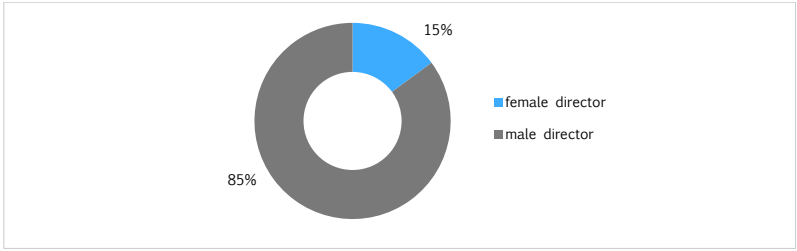
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 9: Fiction film productions in receipt of national funding



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 10: Share of fiction film productions in receipt of national funding (2008-2013)



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

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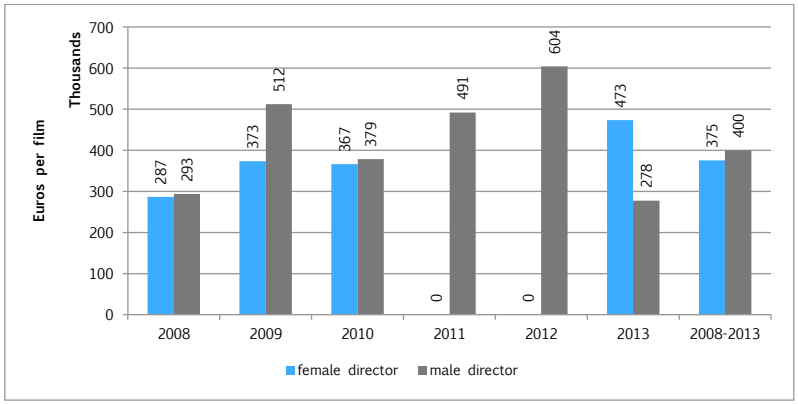
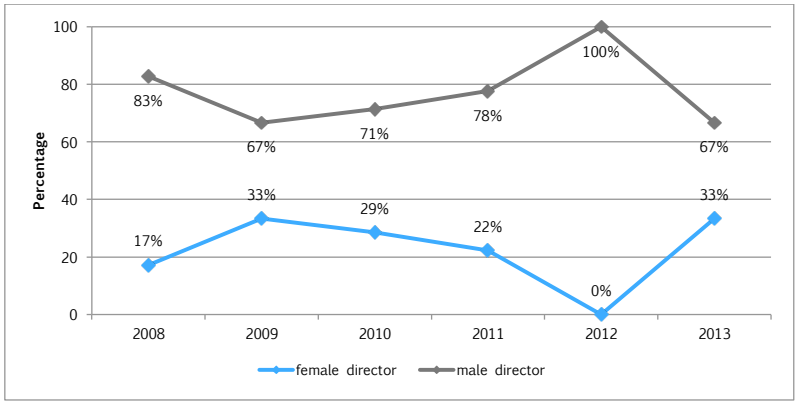
Figure 11: Average amount of national funding for fiction films



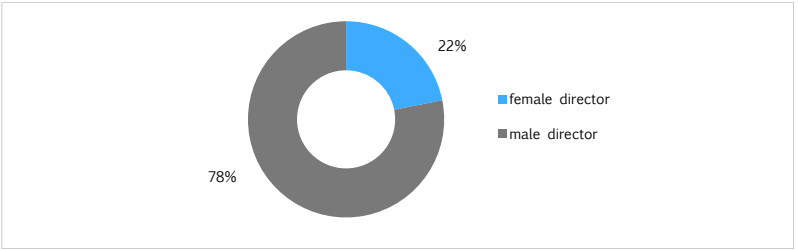
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 12: Documentary film productions in receipt of national funding



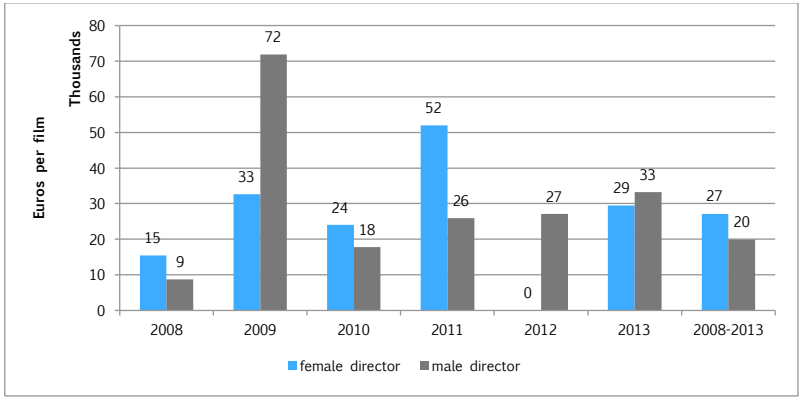
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 13: Share of documentary film productions in receipt of national funding (2008-2013)



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

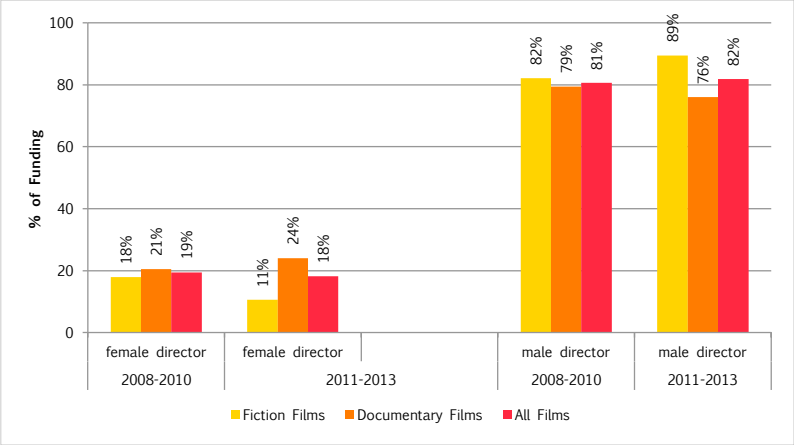
Figure 14: Average amount of national funding for documentary films



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

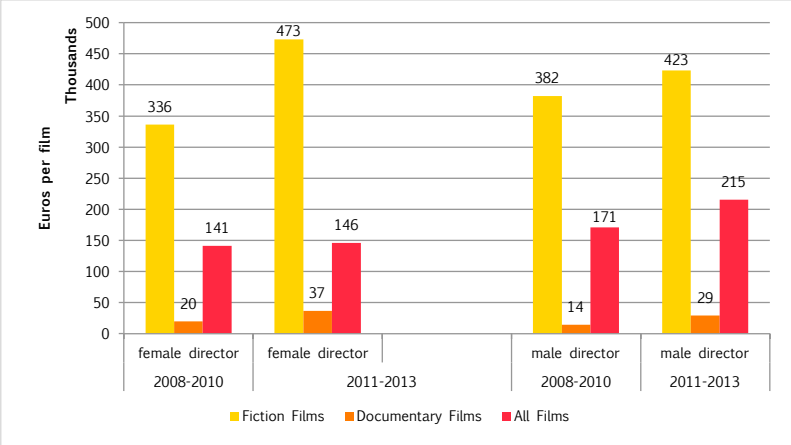
5.2 Progression of HAVC funding by film genre

Figure 15: Progression of nationally funded production shares by genre



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 16: Progression of average funding per project by genre

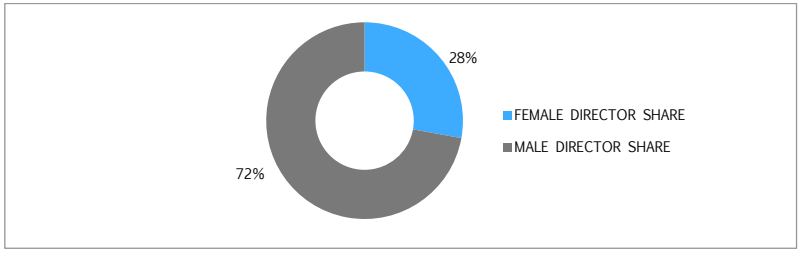


Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

5.3 Targeted production funding by HAVC

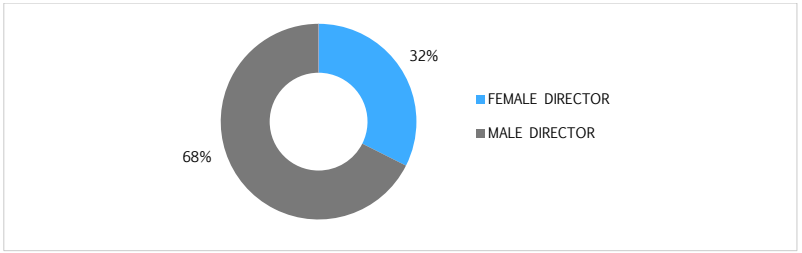
Funding for first-time directors of feature-length fiction films has been available, under the separate scheme since 2008. There is a statutory obligation for the national film fund, to support at least one debut feature per year. EWA analysed the figures for awards given in this separate first-time directors scheme run by the national film fund and in that case the share of debut features directed by women which were allocated production funding by HAVC is almost double that for all fiction films (28% compared to 14.9%), as well as their share in overall funding of debut features (32% compared to 14.1%).

Figure 17: Gender share of debut feature films supported by HAVC (2008-2013) - Projects



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 18: Gender share of debut feature films supported by HAVC (2008-2013) - Funding



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

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VI. Public broadcast funding

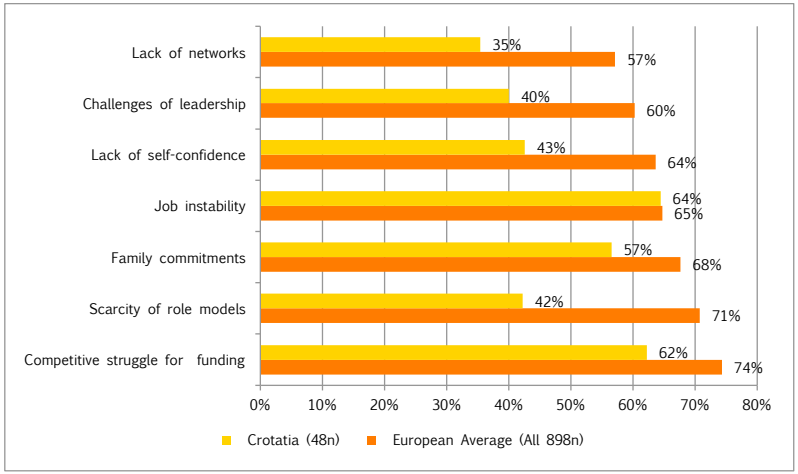
Unfortunately there was no comprehensive data available for the PBS.

VII. The challenges faced by female directors

7.1 What factors discourage women?

A number of options were given and other observations allowed. In their answers Croatian respondents give the highest rating to Job Instability at 64%, followed by the Competitive Struggle to Secure Funding - 62%.

Figure 19: Discouraging women from directing



Source: EWA report database - Questionnaire

7.2 Does gender affect funders' decisions?

A little more than a half of all Croatian respondents think that the gender of the director has no impact at all on public funders' decision to fund films by women directors, with only 19% of female respondents saying that it affects negatively, while none of the male respondents think so.

A third of all respondents think that it impacts the public funders' decision positively.

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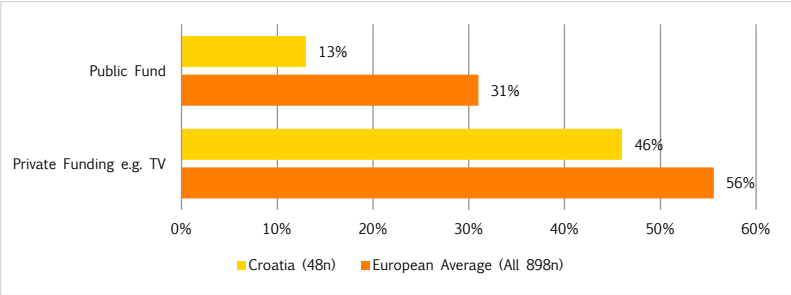
When asked the same question about the private funders' decision the situation is somewhat different as only 9% of the respondents think that it impacts positively, while the rest is split between negatively (46%) and not at all (46%).

Figure 20: How does a female director influence the funding of a project? Negatively



Source: EWA report database - Questionnaire

7.3 What is the impact of being a parent?

48% of directors in the Croatian survey were parents: of which women 50% and men 45%, but only 14% of them think that being a parent discouraged them from directing films, the lowest among all European countries covered by the survey.

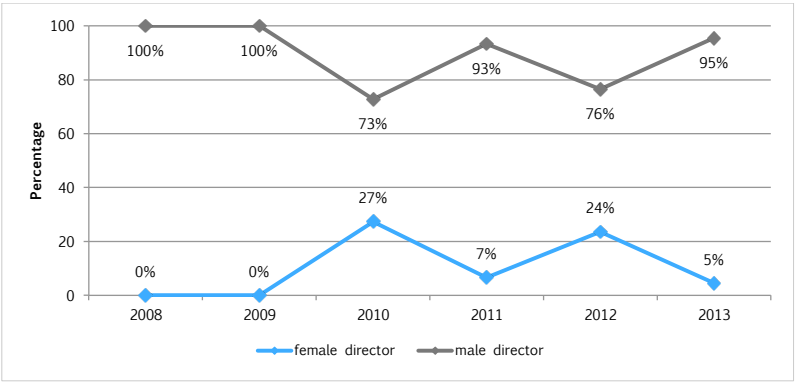
VIII. Releases

8.1 National releases 2008-2013

Overall female share of all national releases is 11,4%.

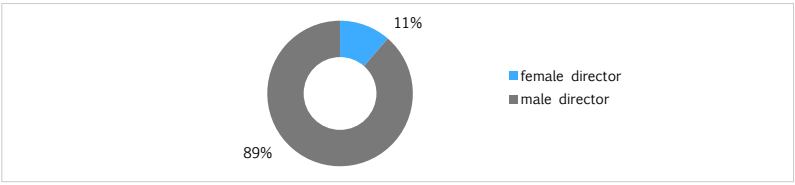
Releases of female fiction films account for 7,5%, which is two times lower than share of fiction film productions in receipt of national film funding. But it is important to emphasise that this is due to the fact that a significant number of productions that were awarded funding in the period covered by the survey, have not yet been released in the same period.

Figure 21: All national film releases



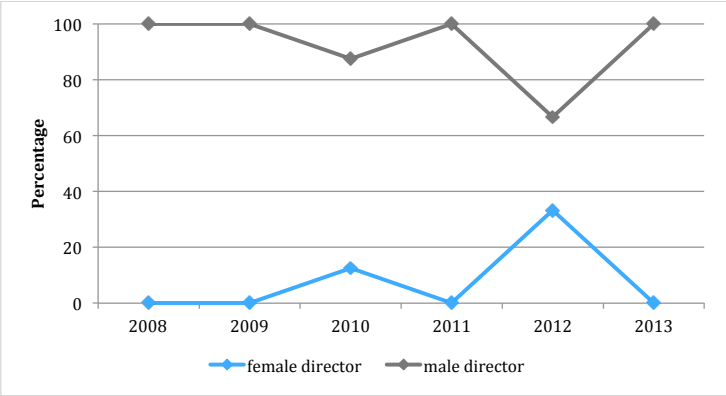
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 22: Share of all national film releases (2008-2013)



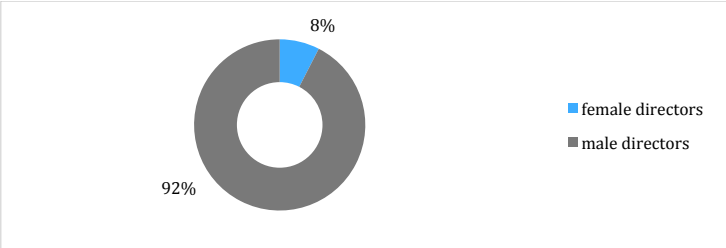
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 23: National fiction film releases



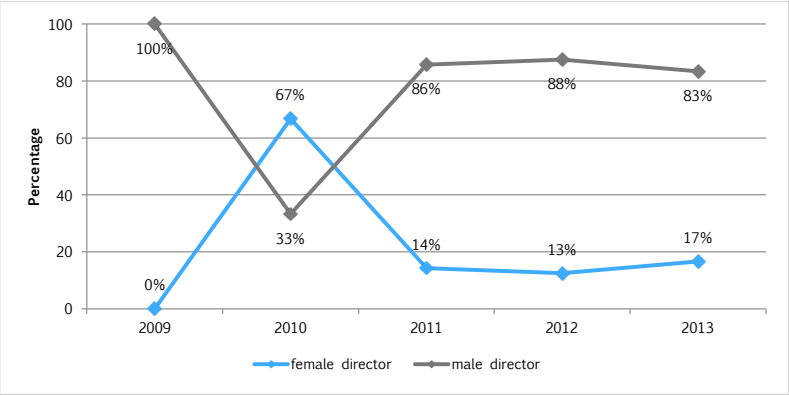
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 24: Share of all national fiction film releases (2008-2013)



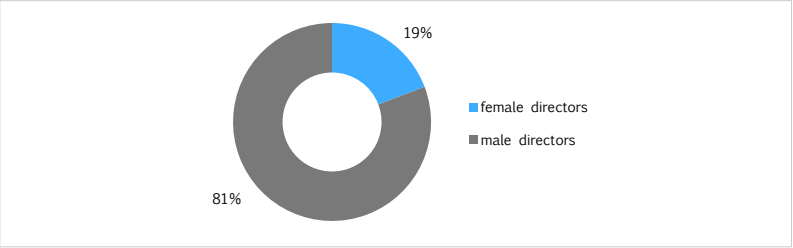
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 25: National documentary film releases



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 26: Share of all national documentary film releases (2008-2013)



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

In the case of released films, this survey did not look into the finer details, as in how wide the releases were in terms of number of copies and screens and whether the gender bias exists in that case, or if it is a result of the genre of the film.

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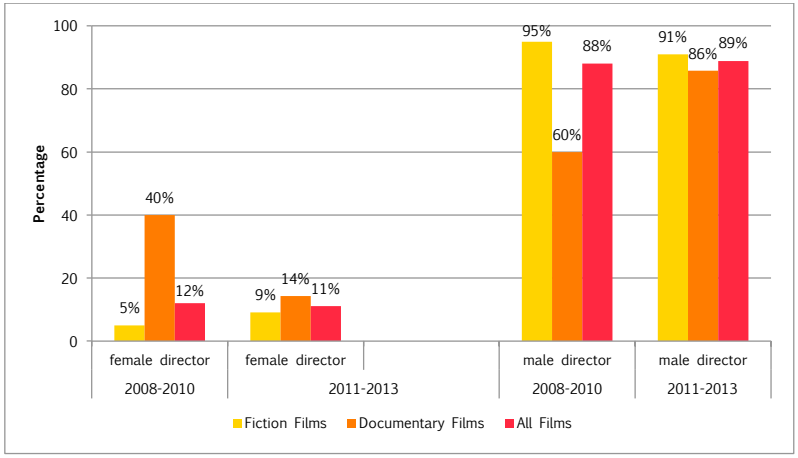
8.2 Progression chart for all Croatian releases – documentary and Fiction

Figure 27: Progression of national film release shares by genre



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

8.3 Are people aware of women's low share of film releases?

Two thirds of all Croatian respondents estimate correctly that female directed films comprise less than 20% of all national films released in the country. When asked the same question about European female directed films released in Croatia, the response is more optimistic as more than 50% of them estimate incorrectly that these would have a 20-30% share.

IX. Awards and critical reception

9.1 Nominations and awards

EWA analysed the 82 Croatian films released between 2009 and 2013 according to gender and the national and international nominations and awards, which each film received. Of the 82 films, 13% were directed by women and 87% by men. The results show that Croatian films directed by women were more likely to participate in international film festivals and gain awards than those directed by men, but less likely to gain national awards.

Figure 28: Nominations and awards by gender of director

2009-2013		Gender of Director					
		Female		Male		Total	
		N	(%)	N	(%)	N	(%)
National Awards?	Yes	2	18,2%	38	53,5%	40	48,8%
International Awards?	Yes	7	63,6%	27	38,0%	34	41,5%
International Festival?	Yes	9	81,8%	55	77,5%	64	78,0%
National Festivals?	Yes	5	45,5%	54	76,1%	59	72,0%

Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

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9.2 Festival A-list awards

Between the years 2009 and 2013 none of the Croatian films directed by women won 5 A list festival awards, but the number is the same for the Croatian films directed by men. This number is more indicative of the perception of the success of Croatian films in general at A-list festivals, than of a gender imbalance.

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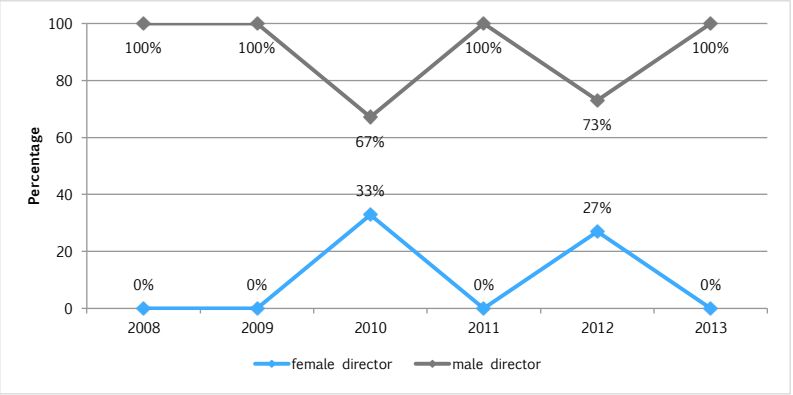
X. Admissions

10.1 Share of admissions for national fiction film releases

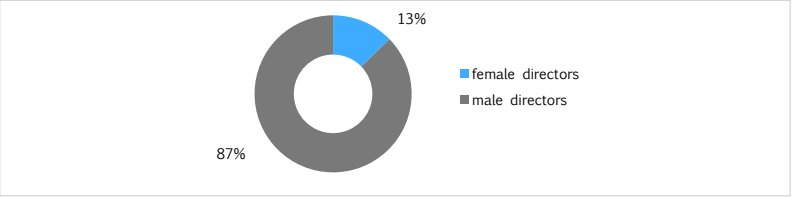
The average share of admissions of all national fiction releases between 2008 and 2013 was 12.7% for films directed by women and 87.3% for films directed by men. But the average box office per film release was significantly higher for films directed by women than for those directed by men, meaning that films directed by women were outperforming films directed by men at the box office.

Figure 29: Box office admissions to national fiction films



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 30: Share of national fiction film box office admissions (2008-2013)



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

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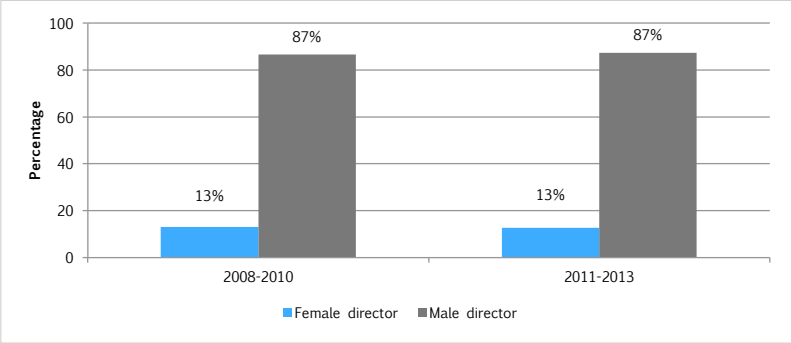
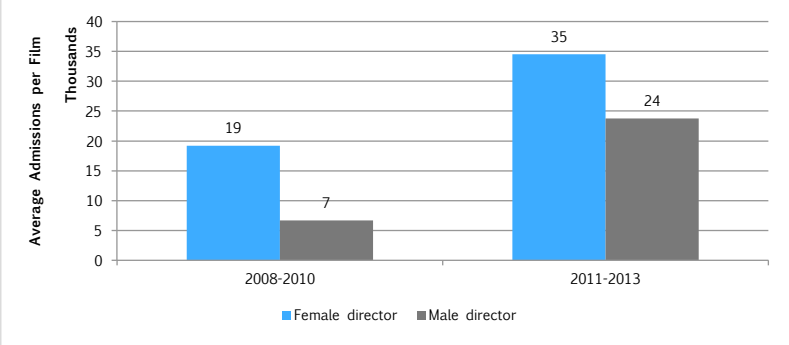
Figure 31: Progression of box office admission shares for national fiction films



Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

Figure 32: Progression of average box office admissions for national fiction films



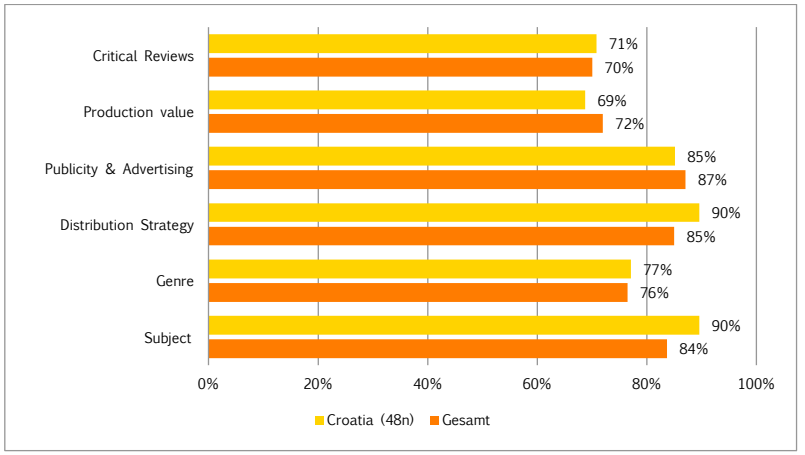
Source: EWA report database – Survey
Base: Croatian Audiovisual Centre (HAVC)

10.2 What affects box-office performance?

Respondents were asked to consider a range of factors in relation to achieving success with the audience. More or less in line with the European average, most of Croatian respondents, almost 90% of them, think that the subject matter of the film,

as well as distribution strategies are the key factors affecting box-office performance of the film, followed by publicity and advertising, at 85%.

Figure 33: What affects box office performance?



Source: EWA report database - Questionnaire

10.3 Does the gender of the director affect the choice of a film?

Few Croatian respondents think that audiences consider the gender of the director as significant factor in choosing a film, which is consistent with results in the other 6 European countries covered by this study. However, there was widespread consensus that the gender of the director affects the treatment of the subject. Well over half of Croatian respondents thought that women's films perform better in festivals than in their own cinema market.

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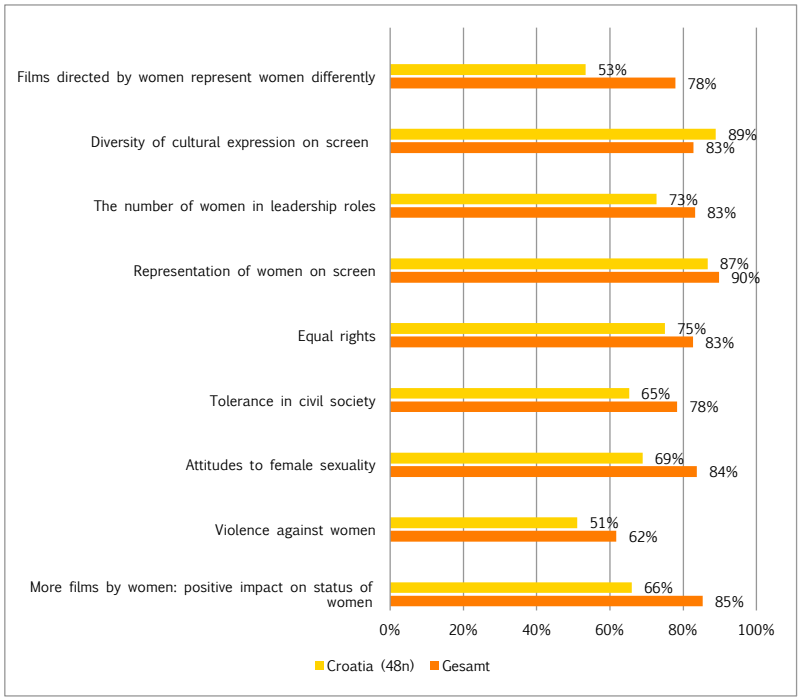
XI. The social impact of more films directed by women

Respondents were asked to consider a range of ways in which increasing the numbers of films directed by women might impact on social culture and practice in Croatia. The highest percentage of respondents felt that it would impact positively on diversity of cultural expressions on the screen, representation of women on the screen and contribute to equal rights for men and women.

Figure 34: Films by women have an impact on:



Source: EWA report database - Questionnaire

XII. Policies for change

12.1 Existing measures for gender equality in the industry

There is great disparity in the levels and way in which gender equality data has been gathered by funders during the period covered by the study, if at all. Where the data exists it has not been mined or monitored and appears that it is only in recent years that the issue is being more systematically addressed, often as part of wider European and not only European debate.

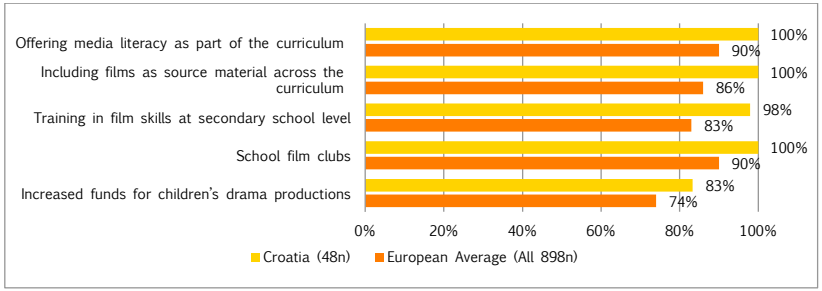
Whilst the Croatian Audiovisual centre, the main source of public funding for Croatian films, has the raw data on gender since 2008, this has not yet been included in its statistical yearbook "Facts and Figures", published since 2013.

Similarly, for the purposes of this project data has not been readily available from the broadcasters, indicating that adequate policies are not in place to deliver regular monitoring and an evidence based approach to discrimination.

12.2 Preparing the ground in school education

All 48 Croatian respondents to the EWA questionnaire agree that the most important thing is to offer media literacy as part of the curriculum, to include films as a source material in schools across the curriculum and they all agree on the importance of school film clubs. Almost equally highly rated is training in film skills at secondary school level.

Figure 35: Measures in schools

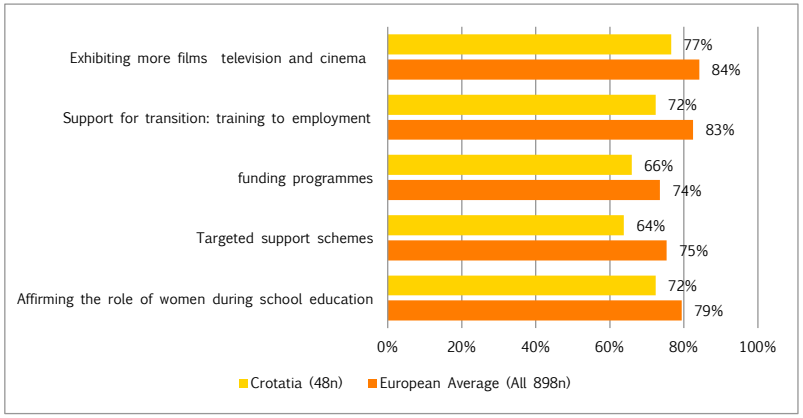


Source: EWA report database - Questionnaire

12.3 Measures to encourage potential women directors

When asked which measures would encourage women to take on a career in directing, Croatian respondents felt they were: exhibiting more films directed by women on television and in the cinemas, as well as affirming the role of women during school education. Support for transition from education to employment was also equally highly rated as a measure to encourage potential women directors.

Figure 36: Factors encouraging women to direct



Source: EWA report database - Questionnaire

12.4 Policies to sustain careers

When asked which policy measures are in their opinion the most important in terms of sustaining female directors' careers Croatian respondents singled out: targeted development and production funding, increased support for 1st and 2nd time filmmakers, as well additional training opportunities, all of which scored more than 80%.

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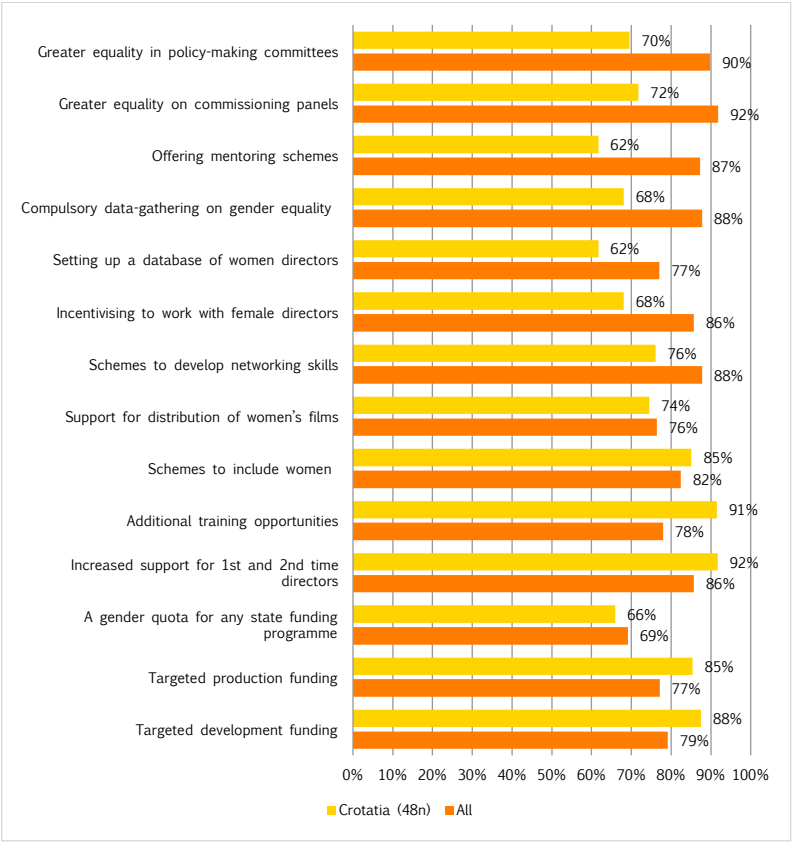
Figure 37: Policy measures: important



Source: EWA report database - Questionnaire

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Conclusion

Although there has been a significant shift towards gender equality in the Croatian film industry in the period since the founding of the national film agency, the Croatian Audiovisual Centre in 2008, action and vigilance is needed to achieve and maintain policy commitments stipulated in the Law on Audiovisual Activities and to realise the economic and cultural benefits of female directors' talents.

Coherent data gathering from all key stakeholders in the audiovisual sector on gender equality is paramount in achieving this.

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APPENDIX III

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FRANCE

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Introduction

This French report is one of seven national reports contributing to the research project *Where are the Women Directors?*

France generally boasts the world's largest number of female directors and therefore, one would expect, a more egalitarian system than other European countries. However, this assertion does not stand up against a detailed analysis of data which until very recently did not exist. Recent reports and surveys related to gender in the audiovisual sector (both by the *Centre national du cinema et de l'image animée* (CNC)[1] and the *Conseil supérieur de l'audiovisuel* (CSA)[2] in 2014) which have been referenced in this study show that there is still much to be said and demonstrated regarding gender discrimination in the audiovisual media in the widest sense of the word. Some of the figures and data given in these earlier reports are misleading, as the overall picture they give does not take into account the wide-ranging obstacles women face in sustaining their career. The obstacles vary for their first and subsequent films.[3] In fact, women's share of public funding for their second (or subsequent) films has not improved (or has fallen) over the reference period.

Providing data and figures is crucial to demonstrate what researchers and activists have said insistently since the increase of women's contribution to cinema. In 2009 Reine Prat's report showed how the world of culture (which did not include cinema) was highly unequal. The association H/F, which aims to promote equality in the field of culture, was created in November the same year and put in place an *Observatoire des Inégalités*. Since then, some initiatives to promote equality in the film industry have taken place but the Charter signed by the French Minister for Culture and Communication and the Minister for Women's Rights on October 10, 2013, came from "outside", being an initiative of the newly created association "Le Deuxième Regard".[4]

Under the charter, the signatories pledge to:

1. Ensure the production of more gender-based statistics for the sector in order to identify problems in men and women's participation, and to join in a shared assessment of the women's position in the French film industry.

[1] *La place des femmes dans l'industrie cinématographique et audiovisuelle*, CNC, 2014.
[2] See http://www.csa.fr/
[3] Thus, the CNC report noted that there had been a rise in women's share of funding, whereas this in fact only applies to first films.
[4] http://www.ledeuxiemeregard.com/

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2. Encourage equal representation of women and men in decision-making bodies.

3. Stimulate cinematic creativity by encouraging the creation of projects that subvert traditional representations of women and men.

4. Raise awareness in their own organisations of the issue of equality by combating gender stereotypes.

5. Apply equal pay rights, and, for those organisations operating under Decree no. 2012-1408 (December 2012), enforce companies' obligations in terms of achieving professional equality between women and men.

No initiative was taken before March 2014, when the CNC produced a report that showed the high level of discrepancy existing between men and women in terms of budget, salaries, funding, and more.

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I. Summary of findings

The number of women wanting to be directors and qualifying at film school is around 56%. But their presence in the industry drops thereafter. The rise in female applicants and graduates from the leading national film school, *La Fémis*, in the past 20 years should affect the percentage of films made by women much more than it actually does. These findings echo those of the *CNC 2014 report*, which found that the problem did not lie in education/training but rather in the commissioning process and the fact that there is no targeted support for second or subsequent films.

There are large discrepancies between the public support directors get for their first film (in terms of funding, awards, production and distribution) and the lack of measures thereafter. Though male directors are often faced with similar problems, since their percentage share is higher to begin with they are less affected than female directors. The share of national film funding allocated to productions with female directors remained steady at around 20% of the total between 2006 and 2013, thus not adjusting to their increasing presence in the industry.

Women's share of funding is low whether at national or regional level or coming from the public or private sector: it represents less than 20% of the total available amount.

Female directors' share of national funding for fiction has not varied greatly over the period. National funding for documentaries has shown considerable volatility.

Productions with female directors have fared slightly better with respect to regional investment although this has varied widely from year to year, and the share is still low in relation to the percentage of active female film directors.

Funding allocations from public broadcasters have largely followed the pattern of the national fund.

The overall share of box-office admissions for national film productions with female directors has remained steady in recent years, with a single major peak in 2009 affecting both fiction and documentary films. The same pattern applies to the top 20 national films, though here there has been a gradual decline in the share taken by productions with female directors since 2010.

France's historical and ideological context (or "*exception française*") helps to explain variations between France and the other countries regarding some of the report's questions, especially with regard to how gender influences funding, the subject of films, film genres, reception etc.: a large majority of all respondents tend to deny its

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importance. However, female respondents acknowledge the misogyny of the industry, and the lower budgets and more limited cinematographic genre options which are open to them.

Republican universalism (and therefore the denial of difference) is internalised by the respondents, the industry, the film schools and the funding bodies to an extent which reflects the fact that France is the country where it took the most time for gendered statistics to be accepted. (Statistics relating to ethnic origin are still illegal in France and so are those dealing with religion.)

Compared to other countries, France's position regarding gender inequality in cinema is striking: whatever aspect is considered, there seems to be a "gender blindness" to discrimination affecting women. This is evident in the choice of solutions to improve the situation as well as in the diagnosis, which recognises institutional prejudice not so much against women as in favour of men. For example, figures for French female directors' share of awards and nominations are poor in comparison with all the other countries. Yet during the recent controversy in Cannes over the absence of female-directed films, the official response affirmed that selection committees would not choose on the basis of gender, this being in line with the assumption that republican universalism stands as a guarantee for equality.

In comparison with the other countries in the EWA report the public funding system in France seems to be more favourable towards women. However, this is largely the result of support for first films (something which is not apparent from the CNC statistics) and even where the system appears generous in France, it is not designed for women in particular. More importantly, film is viewed in France as being in line and within the continuum of the other arts: the role of the state in supporting national arts is another national exception. The CNC is one of only a handful of film institutions in the world which finances so generously a film sector (films d'auteur) for the sake of art only and without expecting it to be profitable.

The specificity of the "*intermittents du spectacle*" status (a state benefit system for artists), together with the very high cultural value associated with film-making since the New Wave, means that by far the majority of people attracted to the industry are middle-class. This in turn impacts on the traditional entry routes through film schools and especially *La Fémis*, the golden path to film making. The fact that it is difficult to obtain data from *La Fémis* (the only film *grande école* benefiting from significant public-sector investment) and that it does not have an official alumni network, is evident in the absence of any data regarding its graduates. Another factor which exists but which is more difficult to establish is the high level of nepotism in the French cinema industry as in film industries elsewhere. Being a wife/sister/daughter/mistress etc. continues to be the best entry ticket, as was

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stated in some of the answers to the questionnaire.

Women are more likely to work in roles other than directing in the film industry and as in society as a whole, there is very strong occupational segregation in terms of the roles that they play, a situation which is reflected in the 2014 CNC report.

Wage rates for female directors have generally been slightly below those for their male counterparts. However, the CNC report found that the differentials are relatively small when compared to the inequality of wages between females and males across the industry as a whole.

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II. Methodology

This report's findings are based on two sources:

1) a quantitative survey to provide available data on the presence of women directors and their films in the French industry;

2) a questionnaire completed by almost 900 respondents, of which 210 were French (160 female and 50 male respondents).

Findings from both sources are presented alongside this report to build the emerging picture.

2.1 Quantitative survey

The research covers the period 2006 – 2013. To assess trends across highly variable annual data for film production and release, data from these eight years has been assessed across two four-year periods.

The data covers documentary and fiction film of 60 minutes and over, in both the film and public broadcasting sectors, although information on gender equality in the broadcasting sector has been difficult to access and is incomplete.

2.2 Qualitative questionnaire

In July 2015 the EWA online questionnaire was distributed via directors' guilds, film schools, film funds and several other professional networks in France, from where the highest number of national responses were received (210).

Most of the respondents work in the creative roles: director, producer and screenwriter. There are more female than male directors (87% of female respondents are mainly or partly directors, as opposed to 53% of male respondents who are mainly or partly directors) but more male producers (43% of female respondents are mainly or partly producers, and 68% of male respondents are mainly or partly producers), as well as a significant number of male experts (29%).

Of all the respondents 56% described themselves as directors, 41% as screenwriters and 28% as producers. The rest are spread across all sectors of the industry including (on the female side) editors, cinematographers and continuity girls.

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The average age was forty so most were experienced professionals in the industry.

Several questions invited respondents to select more than one option so results do not always add up to 100%.

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III. Recommendations for action

From the questionnaire responses there is support for:

- Stronger measures in schools to affirm the role of women in the industry;
- Increasing the numbers of female-directed films in order to improve the status of female directors. Support for this measure is similar in all countries, but the French industry thus far does not appear to be acting on this, as is evident in the failure to give adequate support for directors' transition into the industry.
- Equal representation on all funding committees including committees responsible for allocating grants and bursaries;
- Measures to raise awareness of the importance of achieving equality;
- Targets for a more equal share of production and distribution funding and numbers of women's films in festivals (over 50% of respondents supported targets);
- Measures to support parents working in the industry;
- Incentives to encourage women to work with genre movies;
- Targeted support to incentivise production companies to include first-time directors.

In addition EWA recommends:

- All funding and commissioning institutions should keep statistics on applicants and awards, with annual monitoring to inform development strategy. Statistics should be made public for researchers to access at the CNC and *La Fémis*;
- Official alumni network to be set up by *La Fémis*;
- The introduction of more films made by women in school and film school curriculums (only 6 out of the 208 films on the 2015 guideline list at *La Fémis* were directed by women);
- More visibility to be given by *cinémathèques* to films made by women from the earliest days of cinema;
- Better allocation of funding after the first film, and distribution incentives for second and subsequent films.

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IV. Women's presence in the industry

4.1 Does gender inequality exist?

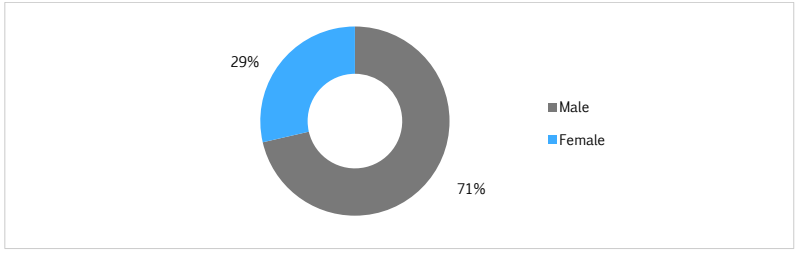
In France 30% of female and 37% of male respondents felt that gender inequality exists, one of the lowest results amongst the seven nations. Women comprised 59% of respondents and 36% felt that it applied fully. Of those who felt it applied, 73% were women. In all other countries with the exception of Croatia, the percentage is around 85-95% of the female respondents.

The figures are indicative of a lack of awareness, or blindness, concerning discrimination as a whole (see findings above) and in this case related to gender in particular.

4.2 Number of working directors

This is a difficult number to assess. There is no register of directors available and the only measure available is the share of films directed by women from one year to the next. However, the CNC 2014 report states that over the period 2009-2012, the percentage rose from below 20% to 28.6% in 2012.

Figure 1: Film directors, 2012



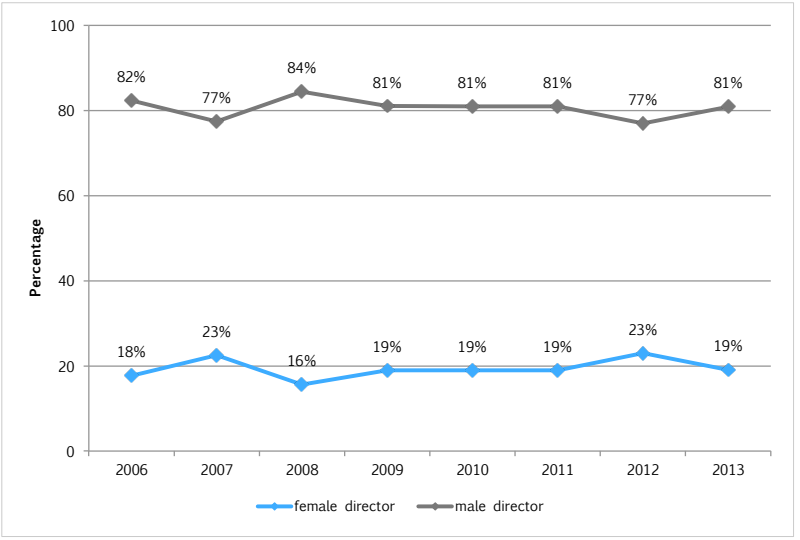
Source: EWA report database – Survey
Base: CNC report 2014

4.3 Number of directors in receipt of national funding

Between 2009 and 2013 the percentage of female directors who received national

funding has remained lower than their male counterparts, with an average 80/20 ratio across the period concerned. The percentage share should also be read in context with the difference in amounts awarded, as women's projects receive less funding overall than those of their male counterparts. The inequality is also reinforced by the variations in wage levels (see section 5).

Figure 2: All national film funding



Source: EWA report database - Survey

V. Entry into the industry

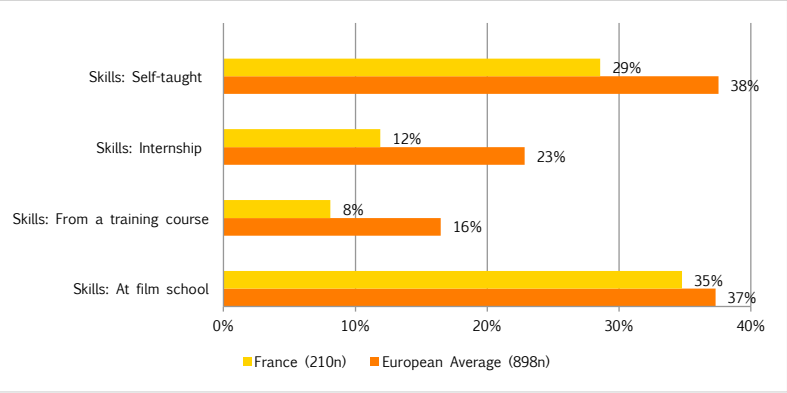
5.1 How did you get your skills?

In comparison with the other countries in the survey, France has a significantly higher number of directors coming from film school and a lower number entering the media industry via training courses and/or internships.

Of the 210 directors responding to the questionnaire, 60% trained at film school, 14% had attended a training course and 19% claimed to have learned through internships or media schemes.

Of those who had not been to film school the majority indicated that they were self-taught through practice.

Figure 3: How did you learn the skills for directing?



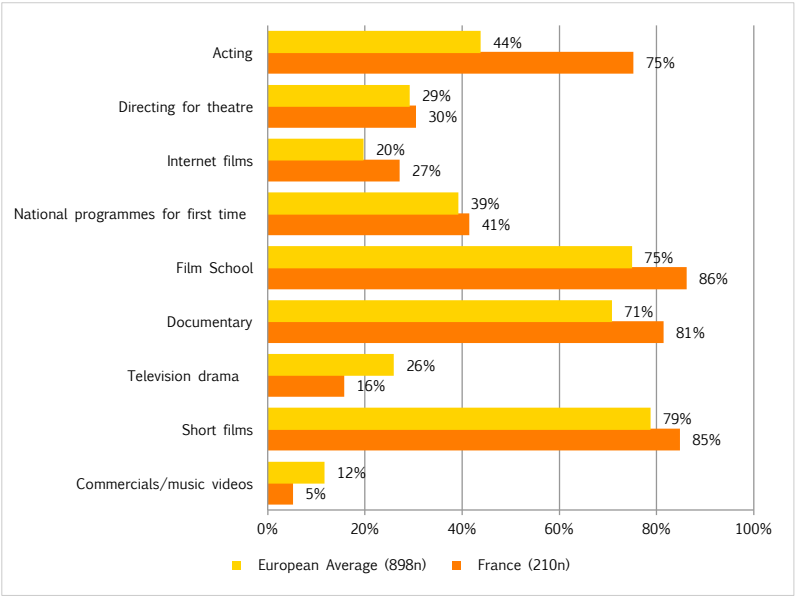
Source: EWA report database - Questionnaire

5.2 What was your route into directing?

Directors were asked which of a range of pathways were the most important routes into directing and offered a yes/no option. Most respondents considered making shorts (85%) the most important route, with film school (86%) and documentary film-making (81%) in second and third place respectively. Unlike in other European countries, there was very little interest in directing television drama (16%) and only

slightly more in directing for theatre (30%). The reluctance to regard television as a valid option is indicative of a lack of esteem for television that the film industry in France has traditionally shared with the intellectual elite. There is therefore a clear link between the introduction of a TV section at *La Fémis* and the recent legitimisation of (foreign) TV fiction in the media, highbrow circles and academia.

Figure 4: Routes into directing



Source: EWA report database - Questionnaire

5.3 Student admissions – *La Fémis*

Graduate figures were not available from *La Fémis*. However, the admissions figures below show that women's share of admissions to the general degree course and TV series degree course are about 45%.

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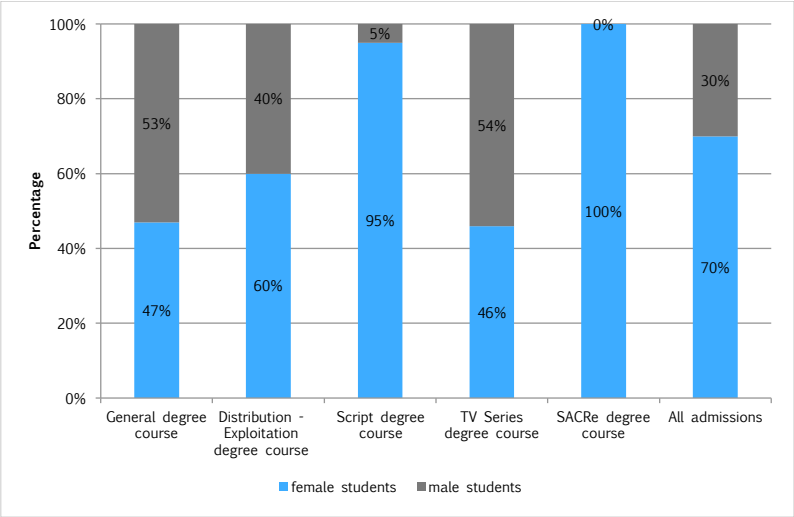
Figure 5: Student admissions to La Fémis film school (2006-2014)



Source: EWA report database – Survey
Base: La Fémis

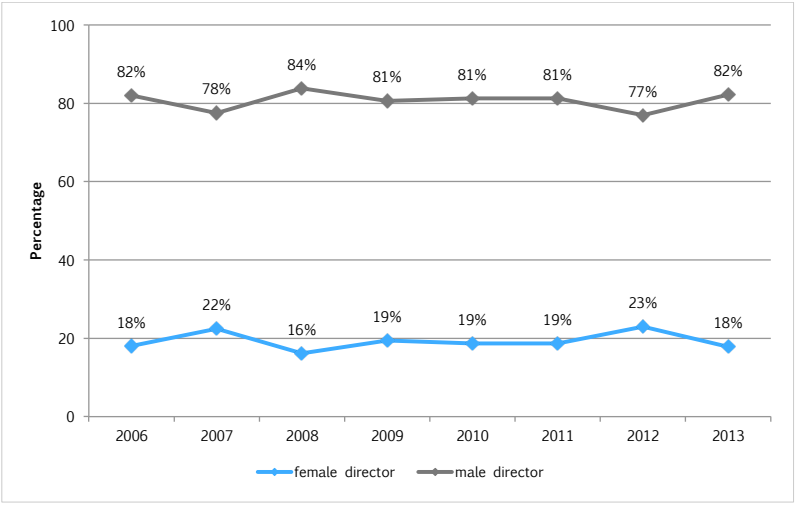
VI. National funding

The CNC supports independent companies whose work contributes to the diversity of films shown in cinemas (see details and chart in Annex). As a result women benefit from a generous system compared to other countries, although the system was not designed to benefit women in particular. This support is largely targeted at first films for men and women alike.

6.1 Share of national funding: Fiction

Women's share of national funding has remained steady during the period, averaging at 19.2%. This is proportionately low in relation to the average percentage of female directors (28% in 2012).

Figure 6: National film funding - fiction



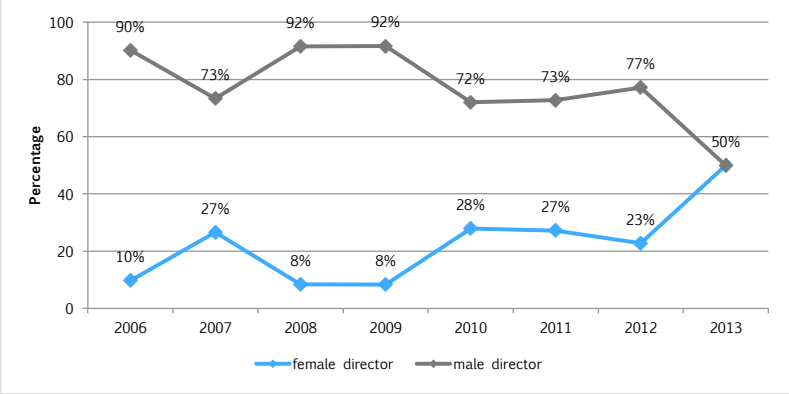
Source: EWA report database – Survey

6.2 Share of national film funding: documentary films

Women's average share of funding for documentary films is slightly higher than that

for fiction, averaging 20.2%, and although it shows large variations annually, there have been five years when the percentage share has been more representative.

Figure 7: National film funding - documentaries



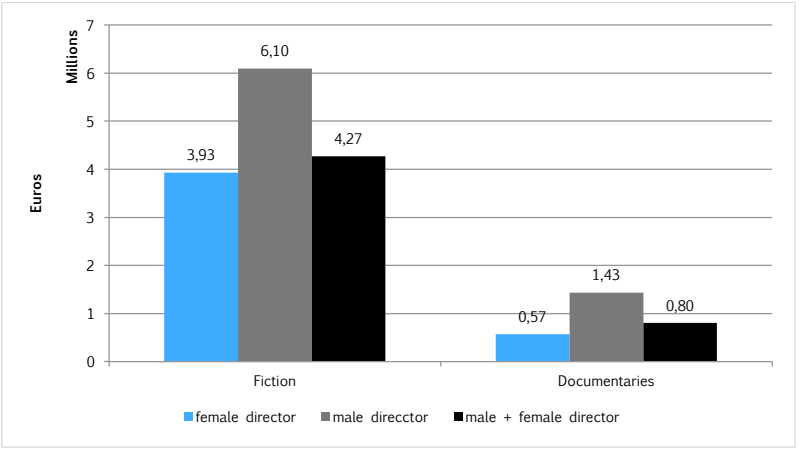
Source: EWA report database - Survey

There are big discrepancies regarding available support for first and subsequent films but these are not reflected in the EWA charts. The percentage success rate for women's first films receiving the coveted *avance sur recettes* is much higher than for second films. Some commissioning bodies of the "*second collège*" commissions deal with all films and they may not receive even a single application from women. Women may internalise the potential failure of their projects, especially when top *auteur* directors are in the race as well.

6.3 Average CNC-approved film budgets

As shown in the CNC 2014 reports and in the chart below, women get less money when their project is shortlisted than their male counterparts, and the average budget per film is 1.7 times lower than that for male directors in the low-budget *auteur* category. These films represent 70% of the films made by women between 2008 and 2012.

Figure 8: Average CNC-approved film budgets (2006-2013)



Source: EWA report database – Survey

Comments from the questionnaire:

"Le budget alloué. Un film fait par une femme sera toujours dote d'un budget plus petit qu'un film fait par un home (cela est aussi du coup lié au Genre du film: on ne confiera pas un polar ou un thriller à une femme, mais plutôt à un homme)".

"The budget. A film made by a woman will always have a smaller budget than one made by a man (this is also linked to the genre of the film: a detective film or a thriller wouldn't usually be given to a woman, but to a man)"

6.4 Regional funding

The decentralisation programme introduced in 1992 gave regions more power (this is important in a country as centralised as France has been since the Revolution). The development of specific funds allocated to filmmaking has totally changed the "funding landscape". The CNC's local initiatives policy is implemented via the signing of agreements with local authorities. It is aimed at making the film and television sector a vehicle for local cultural and economic development, through close co-operation between local and central government. It covers support for development, production and hosting production teams, and initiatives for media education, cultural dissemination and film exhibition.

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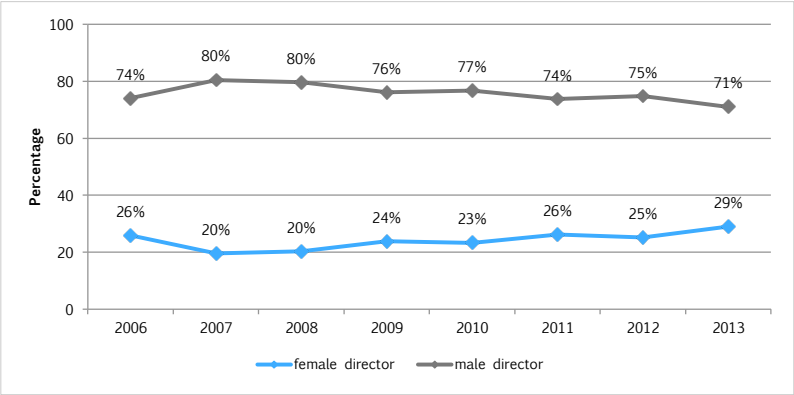
The figure for women's share of regional funds (24.2%) is higher than their share of national funding (19.3%) and there has been a slight increase in the percentage annually. However, after the downturn in 2006, this increase has only allowed women's share to improve by 3%, to 29%.

Figure 9: All regional film funding



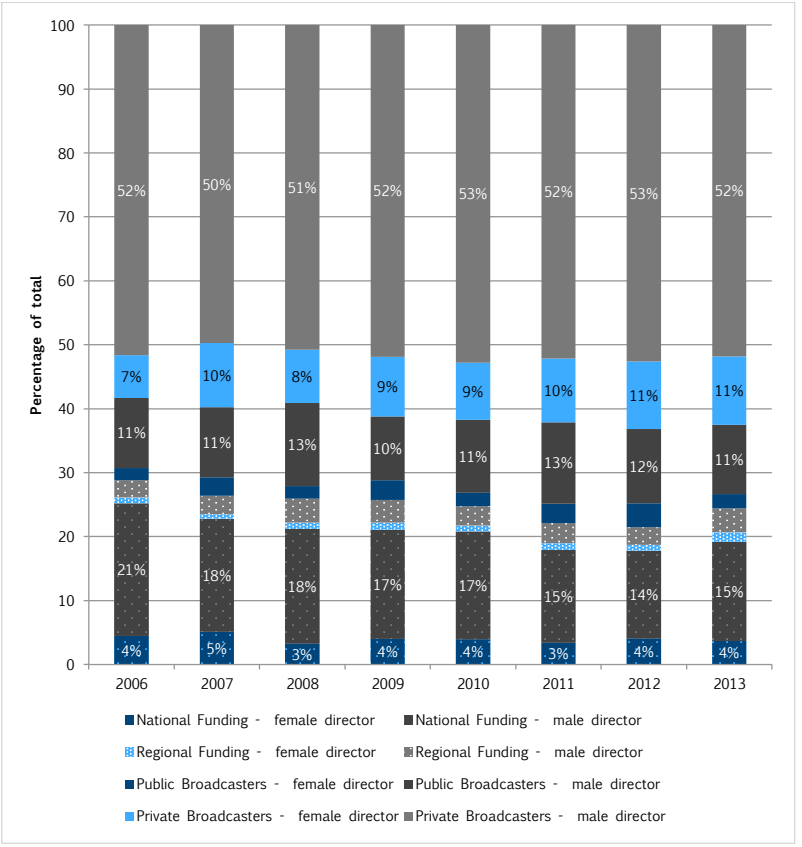
Source: EWA report database – Survey

6.5 Alternative sources of national funding

There are various sources of funding for film in France: public and private, national and regional. Over the period studied a total investment of 3,436 million euros breaks down as follows: State funding €710m; regional funding €144m; public broadcasters €485m; private broadcasters €2,097m.

In concrete terms, this means that the biggest funder is the private broadcasting sector with slightly more than 61% of the overall amount. State funding is significantly lower, followed by public broadcasters and regional funding. Beside the tax all channels must pay to the CNC, public and private channels also produce or co-produce films. The male/female ratio does not differ significantly from one sector to the next. The average ranges from 15 to 18% for female directors and 82 to 85% for male directors.

Figure 10: Distribution of film funding sources (2006-2013)



Source: EWA report database - Survey

6.6 Progression of various funding sources by gender: fiction

In fiction the distribution in the share of funding for women and men across different funding sources remains fairly stable across the two four-year terms.

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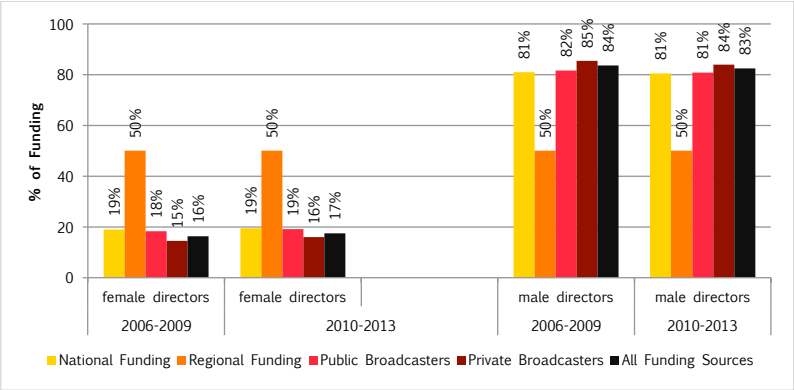
Figure 11: Progression of fiction film funding shares by source

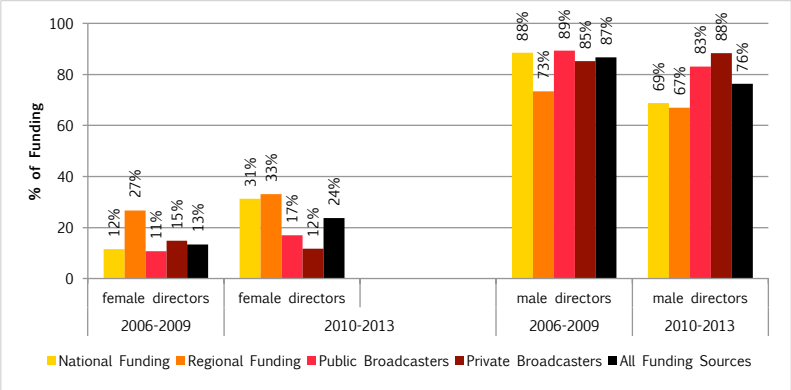


Source: EWA report database - Survey

6.7 Progression of various funding sources by gender: documentary

In documentary the percentage share increases for women across all sources, most significantly in national funding. The highest shares, for national and regional funding in the second four-year term, are only just above 30%.

Figure 12: Progression of documentary film funding shares by source



Source: EWA report database - Survey

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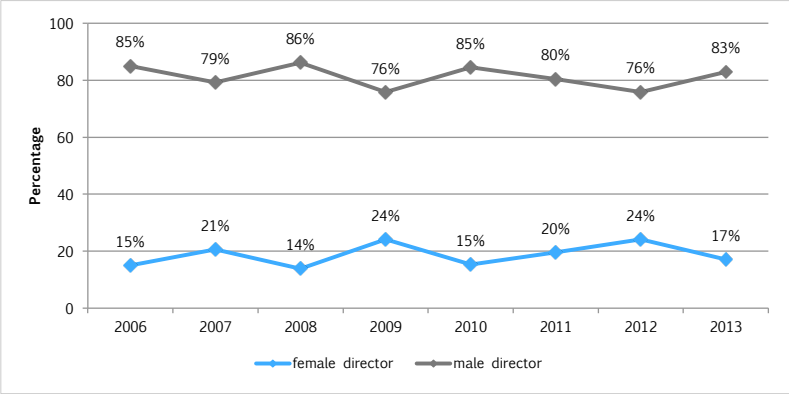
VII. Broadcaster funding for women's films

Several decrees specify the obligations of television service providers to contribute to film production. These production obligations differ depending on the channels' method of broadcasting: unscrambled analogue terrestrial broadcasting, scrambled analogue terrestrial broadcasting, terrestrial digital broadcasting, broadcasting via cable or satellite. The decree passed in 1984 (updated in 1990) stipulates that **all** channels (public and private, terrestrial or not) must give 3% of their turnover to the CNC in order to help finance French cinema. Although no policy on gender equality has been issued, some women's networks have appeared, such as the one set up at France Télévisions: http://www.francetvaufeminin.fr/

7.1 Gender share of public broadcasting

For fiction films, women's share of public broadcaster funding has fluctuated between 14% and 24% over the period, averaging at 18.8%.

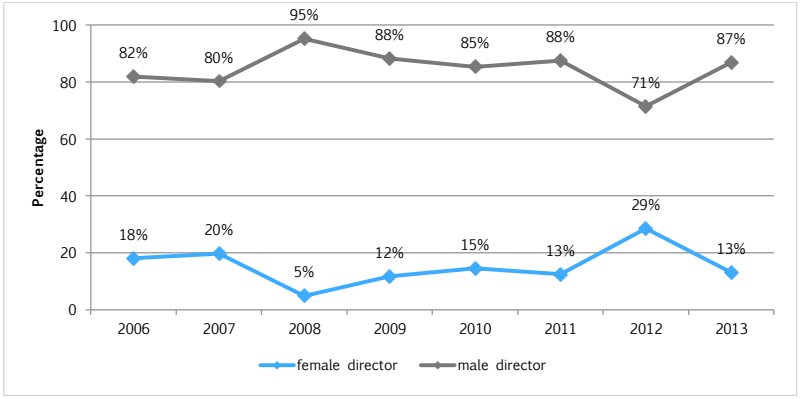
Figure 13: Public broadcaster film funding - fiction



Source: EWA report database – Survey

For documentary films, women's share of public broadcaster funding has fluctuated between 5% and 29% over the period, averaging at 13.7%.

Figure 14: Public broadcaster film funding - documentaries

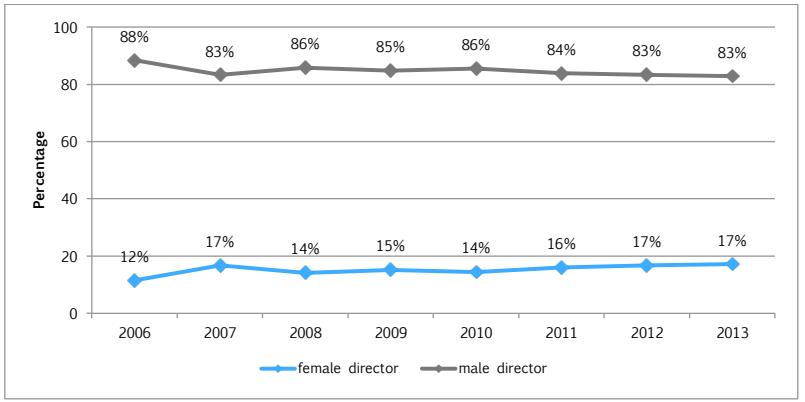


Source: EWA report database - Survey

7.2 Private broadcasting

For fiction, women's share of private broadcaster funding has fluctuated between 12% and 17% over the period, averaging at 15.3%.

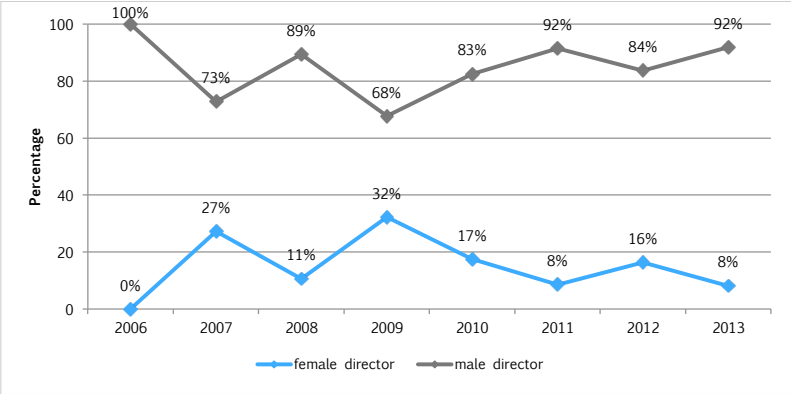
Figure 15: Private broadcaster film funding - fiction



Source: EWA report database - Survey

For documentary films, women's share of private broadcaster funding has fluctuated between 0% and 32% over the period, averaging at 13.3%.

Figure 16: Private broadcaster film funding - documentaries



Source: EWA report database - Survey

7.3 Impact of gender on broadcaster investment

Answers to EWA's questionnaire tend to suggest that neither male nor female respondents believe that gender impacts on public broadcaster investor decisions. There is, however, an interesting variation regarding the private sector: a majority of female respondents (58%) believe that being a woman has a negative impact on private investor decisions while 67% of male respondents do not think it has any impact.

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VIII. The challenges faced by female directors

Respondents were given a number of factors to consider which might affect their progression in the industry. From the answers, it seems that in France some of the challenges come from the directors themselves, whose awareness of gender bias appears very low, especially compared to other countries. It should be noted here that in France the myth of equality is spread from a very early age. Another important national specificity is the concept of art as genderless, without ethnic or class origin, etc. This means that Art as a whole is supposedly "neutral", an aspect which many women internalise to such an extent that they refuse the label "woman" director. This is also indicative of their lucid understanding that feminising an activity or practice affects the recognition and legitimacy it can receive from the professional sector (the refusal of most women directors to attend or be associated with the oldest women's film festival, Créteil, is another clear indicator).

8.1 What factors discourage and encourage women?

The comparative chart below shows that in France more respondents ascribe importance to personal factors, lack of confidence and the impact of family responsibilities (family commitments) than in other European countries. In the gender breakdown of responses, the results show a differential between male and female respondents regarding what is considered important or not, although in both cases most respondents are convinced that the factors affecting a women's career are personal rather than linked to the structure of the industry itself. For women, there are three main challenges : family commitments, competition for funding and lack of confidence. For men, who comprise more than 50% of respondents to this question and whose answers thus have a significant effect on the average result, the highest factor is considered to be family commitments.

There was a wide-range of opinion offered in the comment section, giving an impression of the film industry in France as one where misogyny and sexist behaviour seem to be the norm. Most of them start with "lack of" followed by "respect, vision, trust", etc; misogyny or sexism repeatedly appear, and questions about the expectations of women on the part of decision-makers/ funders/producers are equally recurrent. A handful of respondents also deny gender difference in a gender-blind way which seems characteristic of the French situation. Of the 17 additional observations, 8 highlight prejudice in the industry environment, 3 deny the difference between men and women, 2 underline the significance of the inner characteristics of women and 1 remarks on poor political leadership.

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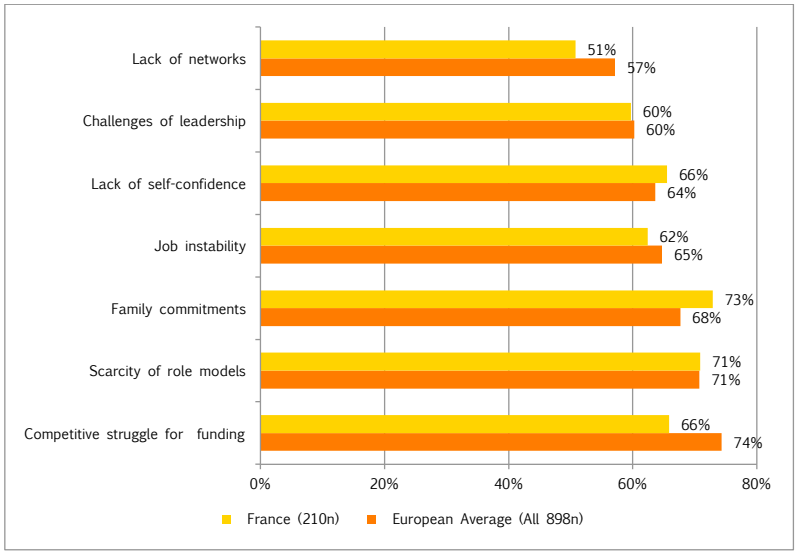
Figure 17: Which factors are discouraging women from directing?



Source: EWA report database - Questionnaire

In the questionnaire respondents are also invited to consider a list of factors which might encourage women to take up directing. The French response is generally slightly less affirmative than other European countries. In the comment section responses indicate what seems to be a difference between men and women: while many factors are affirmed which propose *parité* (equal gender representation) in commissions, festivals, distribution, top management positions, budgets etc., other responses appear to deny discrimination and inequality: "It's not really a problem of gender". Some even reject the basis for the questions raised entirely: "Considering how men and women appear to have an equal desire to direct films, there seems no reasonable basis for these questions" ("*Dans la mesure où il m'apparaît qu'hommes et femmes son égaux dans leur désir de réaliser, ces questions m'apparaissent sans fondement*"). This is not a unique occurrence and is indicative of respondents not considering the relevance of the problem in question – gender equality.

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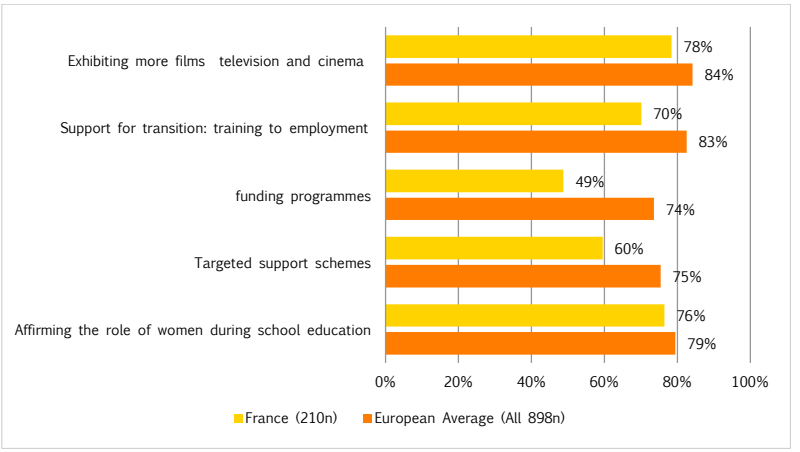
Figure 18: Factors encouraging women to direct



Source: EWA report database - Questionnaire

8.2 What is the impact of being a parent?

Unlike other countries, in France neither women nor men seem particularly concerned (55% and 62% respectively) about the impact of parenthood. The specific status of *intermittents* (the state support system outlined in the introduction) is potentially significant here as the support system in France is more generous than in other European countries.

However, some additional comments indicate that there is a problem in the unequal distribution of tasks and time in parenthood.

Other comments:

"La prise en compte que nous sommes dans un pays encore sexiste où les femmes s'occupent davantage des enfants, voire du foyer et qu'elles ont donc besoin d'aide supplémentaire pour les métiers du cinéma."

"Take into account the fact that we are still living in a sexist country where women have more responsibility for looking after children and the home as a whole and therefore need extra help to carry on a career in film."

"Soutien pour la garde des enfants" "Support for childcare is needed"

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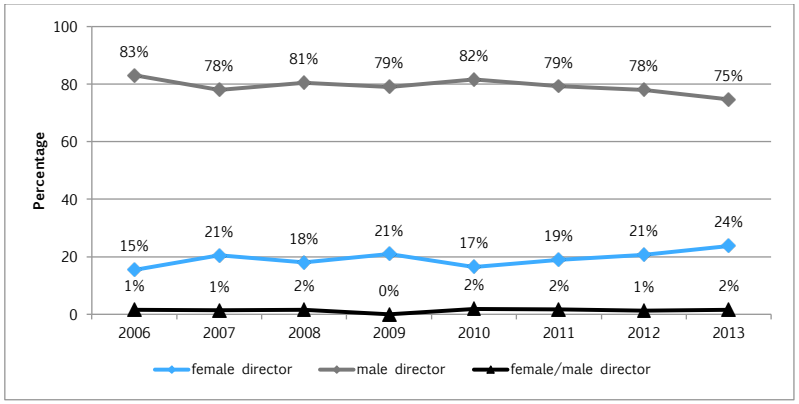
IX. Releases

The optimism expressed in the CNC report regarding women's contribution to filmmaking in France in the past few years should be tempered by the evidence from the chart below and by previous research. In 1995 the finding from research which I co-published[5] () showed that in 1995 24% of the films released were directed by women in France. Given the figures below, this means that in the past 10-15 years, the proportion of films by women has not kept in line with the rise of women graduates from the major film schools.

For fiction, the overall proportion of women directors is 19.5%, with a slight increase resulting from the share (1.4%) ascribed to films with both male and female directors. There has been an increase in the annual percentage, from 15% in 2006 to 27% in 2013.

Figure 19: FIF-funded film releases - fiction

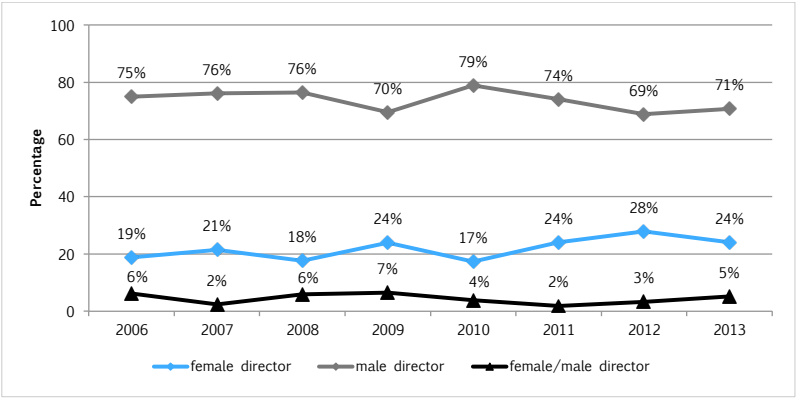


Source: EWA report database – Festivals and awards
Note: FIF = films d'initiative française (*French Inititative Projects)*

Women's share of documentary releases is slightly higher than for fiction: 22.4%, with an additional share resulting from the 4.2% ascribed to films with more than one director. Their share has increased from 2006 (19%) and the highest proportion was in 2006 (28%).

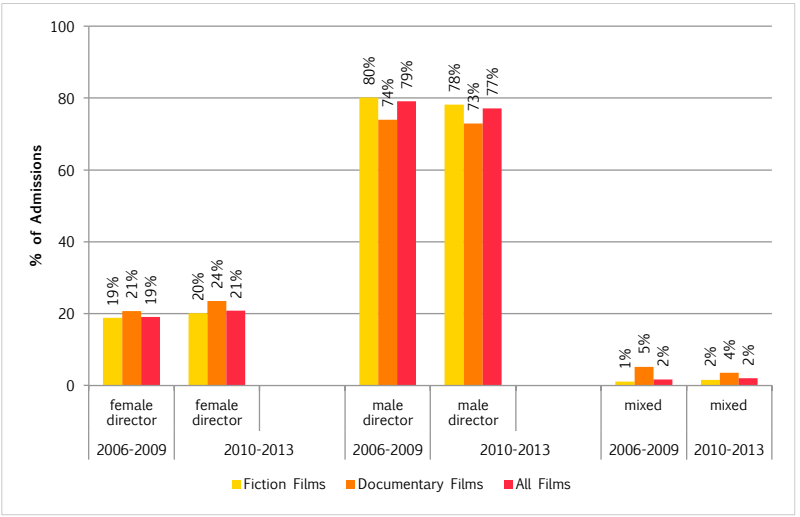
[5] TARR, Carrie and ROLLET, Brigitte, *Cinema and the Second Sex. Women's Filmmaking in France in the 1980s and 1990s*, Continuum, 2001.

Figure 20: FIF-funded film releases - documentaries



Source: EWA report database – Survey

Figure 21: Progression of FIF-funded film releases by genre



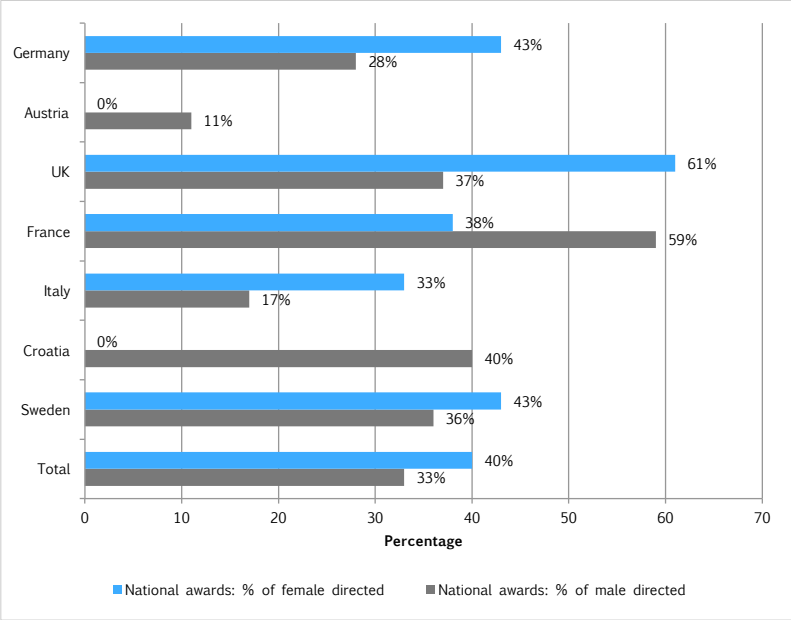
Source: EWA report database - Survey

X. Awards and critical reception

10.1 Nominations and awards

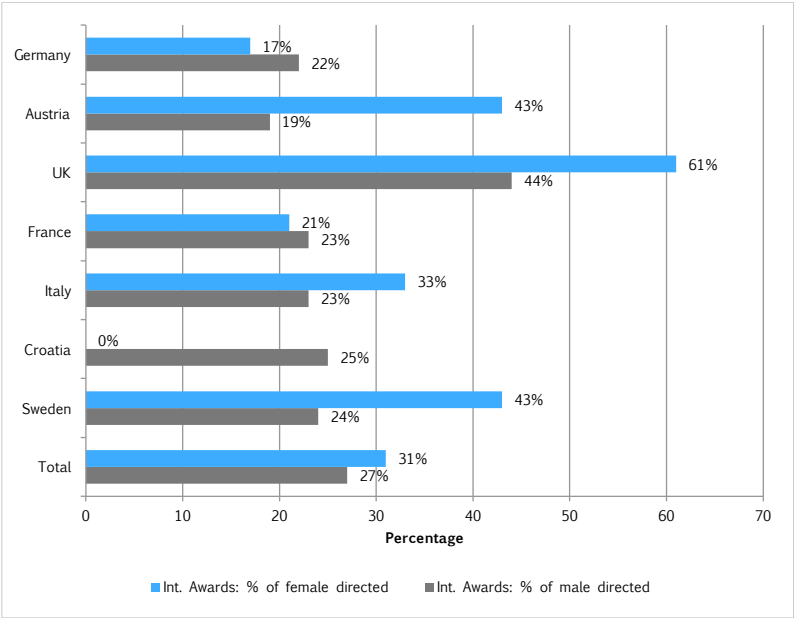
EWA gathered figures relating to nominations and awards in **2013** which show that France is the only country in the study where women's films do not get as many awards or festival nominations in comparison to men's films. The differential is larger for national awards (21%) than for international awards (2%). As for the festival *Césars*, there is a clear distinction to be made between nominations and awards: 13 nominations for *Camille redouble* in 2013 but no awards, and the same amount of nominations for *Polisse* in 2012 resulting in only 2 awards. In 1992, *Place Vendôme* had 12 nominations and no awards.

Figure 22: National awards received in relation to all films directed either by women or by men, 2013



Source: EWA report database – Festivals and awards

Figure 23: International awards received in relation to all films directed either by women or by men, 2013



Source: EWA report database – Festivals and awards

In comparison to the other A-list festivals in Europe (Berlin and Venice), the Cannes Film Festival stands out with regard to its selections and awards. The 2012 edition was not the first one without any women's films, as there was a similar absence in 2010. The reactions of both the Cannes festival director and the French press in 2012 are clear indications of the way gender issues have not hitherto been addressed by the French film industry. It is therefore less surprising to see the position taken by certain French female directors regarded as "Cannes favourites", who repeatedly assert that there is no sexism in French cinema and criticise feminism and feminists who dare to express an opinion that the contrary is true.

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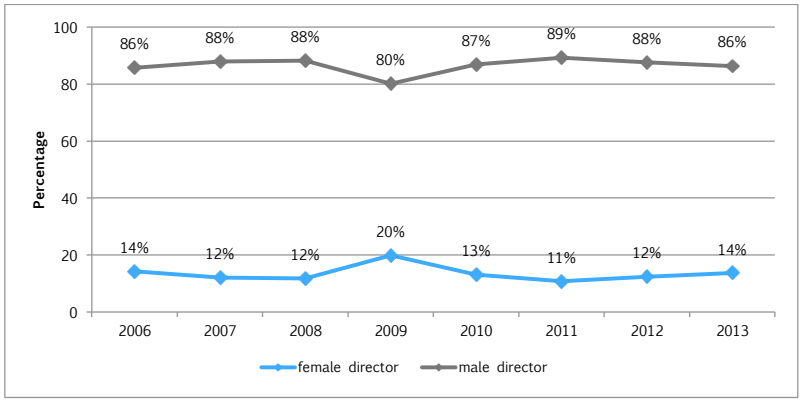
XI. Box office

11.1 Gender share of box-office admissions

Only in one year (2009) have female-directed films reached a 20% share of the box office. However box-office statistics need to be contextualised. They neither show nor account for the fact that most films made by women are auteur films with very limited budgets and exhibition, despite a generous CNC allowance that allocates 15 000 euros for distributors (see Annex). The successful films directed by women since the early 2000 have also largely been comedies. In this respect the period under study shows patterns which are different from what happened in the 1980s and 1990s, when the most successful films made by women covered a large variety of cinematographic genres (see Tarr and Rollet 2001).

Figure 24: Box-office admissions to all national films

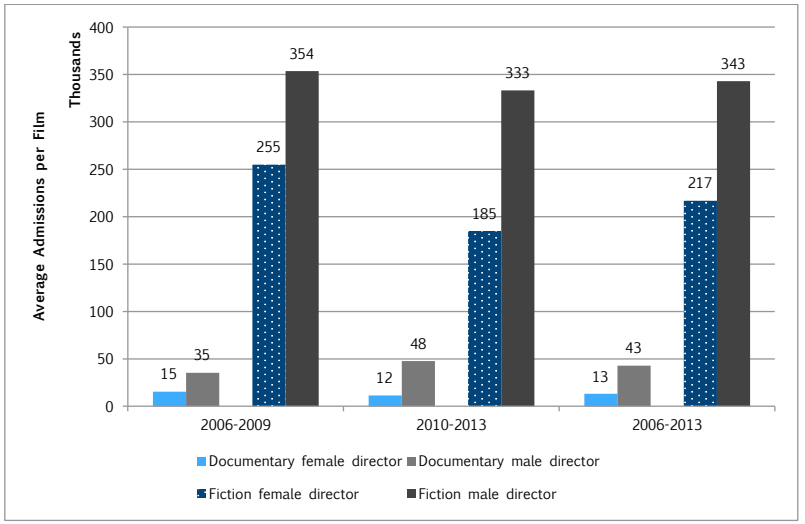


Source: EWA report database - Survey

11.2 Progression in average box-office admissions

The figures for progression in average box-office admissions show a slight decline in the share for fiction films directed by women and a rise in the share for documentaries. However, the differentials between men's and women's films are considerable.

Figure 25: Progression of average box-office admissions per film by genre



Source: EWA report database - Survey

11.3 What affects box-office performance?

The "gender blindness" is stronger here than ever and the impact of the genre, subject and type of films needs further research as it is beyond the scope of this study. The average is in line with other countries, the most important factors being publicity, advertising and distribution. France also considers the subject of the film to be important.

Although male responses to the EWA questionnaire were similar, in all cases there is a negative emphasis and a difference of between 3 and 0.7 in relation to the female mean.

Other comments

There were sixteen other comments given, of which three concerned the subject of the film, and one pointing out that budgets for women are always lower and that they are rarely funded to make genre movies. Three comments were also given affirming the need for greater support with distribution and festivals, and observing

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that certain problems are faced by both men and women.

"Let's stop talking about 'women's films'. Women direct the same films as men. We are talking about sensibilities, which are dependent on individuals not on their gender. Let's stop asserting that women make a particular type of film. This is not true"

"Arrêtons de parler de "films de femmes" les femmes réalisent les mêmes films que les hommes, on parle de sensibilité qui est propre à l'individu pas à son sexe, arrêtons de dire que les femmes ne réalisent qu'un type de film c'est faux!"

11.4 Did the gender of the director affect the choice of a film?

Neither men nor women considered that the gender of the director affected their choice of film to view.

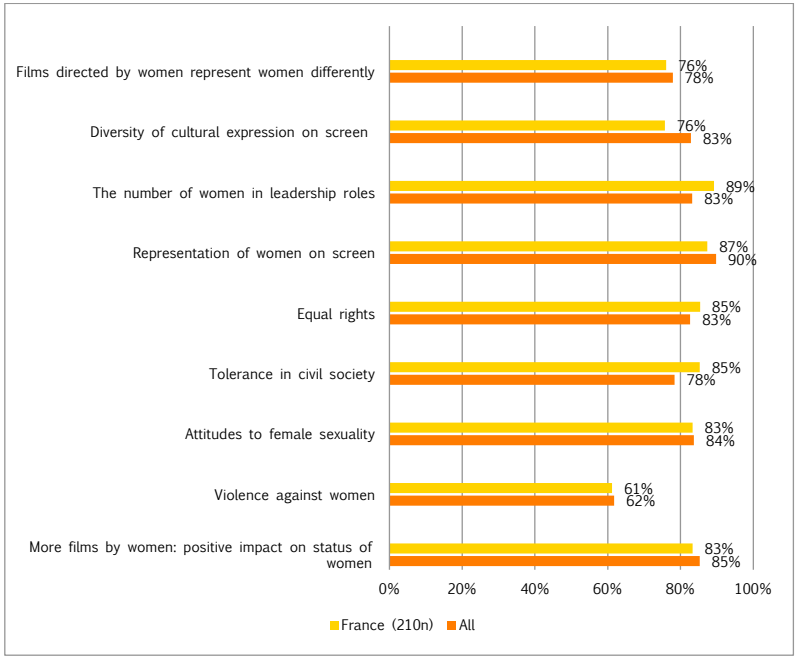
XII. The social impact of more films directed by women

France is consistently slightly less convinced than other countries on the social impact of film. The strongest difference is in relation to films' potential impact on violence against women. It should be noticed that there was considerable difference in responses dependent on the gender of the respondent. For women the most important is the impact on women in leadership roles (1.4); on women's status in society and their representation on screen (1.5); on attitudes to sexuality; equal rights; and tolerance in civil society (1.6) All other options have a negative weighting.

For men most importance is given to the impact on women's representation on screen (1.9). All other options have a negative weighting.

However, in terms of the overall percentages, France is in line with those of other countries regarding the social impact women's films may have.

Figure 26: Films directed by women have an impact on…



Source: EWA report database - Questionnaire

XIII. Changing the picture – policies for change

13.1 Existing measures for gender equality in the industry

For the reasons given in the introduction, there are no strategies in place specifically targeting gender inequality and the answers to the questionnaire below suggest that the situation won't change. There is a strong opposition from men to targeted measures and/or quotas. That impression is reinforced by the open answers ("art is not a matter of quotas or funding", "quotas are discrimination" "why point at women, this is stigmatisation", "no ghettoisation"). The open answers also sometimes provide one idea (*"La parité dans toutes les instances serait un formidable appel d'air"* "Equal representation within all bodies would have a real magnet effect") and the contrary *("la parité n'est absolument pas une solution!"* "Equal representation is absolutely not the solution!")

13.2 Preparing the ground through education

The figures and percentages below tend to illustrate that the further the actions taken are from the production set, the higher they score. This partially explains the similarly high importance attached by men and women to education (1.3)

Overall the female and male response to the different options is similar, with the most popular actions being:

Media literacy in the curriculum 1.4; film clubs and more films as source material across the curriculum 1.9.

Other suggestions from the comments supported:

- Media literacy to encourage understanding of cinema as an art form and to deconstruct how stereotypes are formed;
- Teaching leadership skills and including an aspect to address male attitudes to women as role models;
- Inviting more female directors to give presentations.

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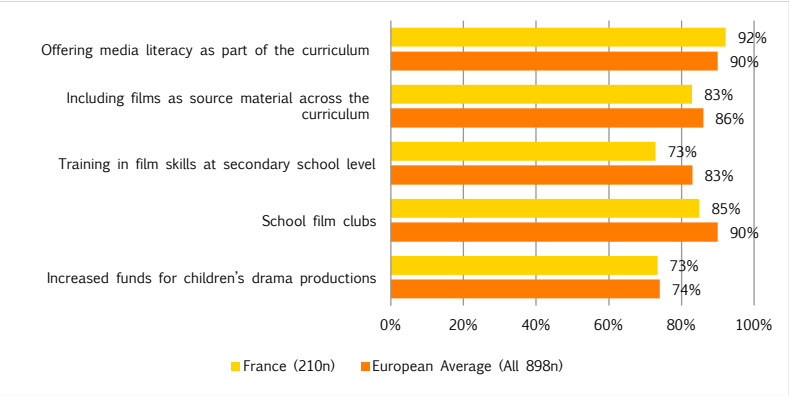
Figure 27: Measures in schools



Source: EWA report database - Questionnaire

13.3 Policies to sustain female directors' careers

As shown below, France is the country where there is the lowest percentage of support for any targeted measures regarding funding or quotas. However, when women's responses are considered separately another picture seems to emerge.

Men's response is negatively weighted in relation to all options.

Women's response is strongest in support of under-represented sectors (1.6) and for compulsory data gathering for public and private broadcasters (1.6). There is also support for measures to assist first- and second-time directors (1.9); equality on commissioning panels (1.3);; and incentivising producers (1.9).

It is worth noting that in relation to all the measures which would improve women's situation in cinema, those which do not directly affect men's position get the highest support in France among men and those which might affect them (targeted measures, quotas) get the lowest support. In comparison with the other countries in the report, there is a significant difference in support for targeted measures in support of women, 49% in favour in comparison with 75%.

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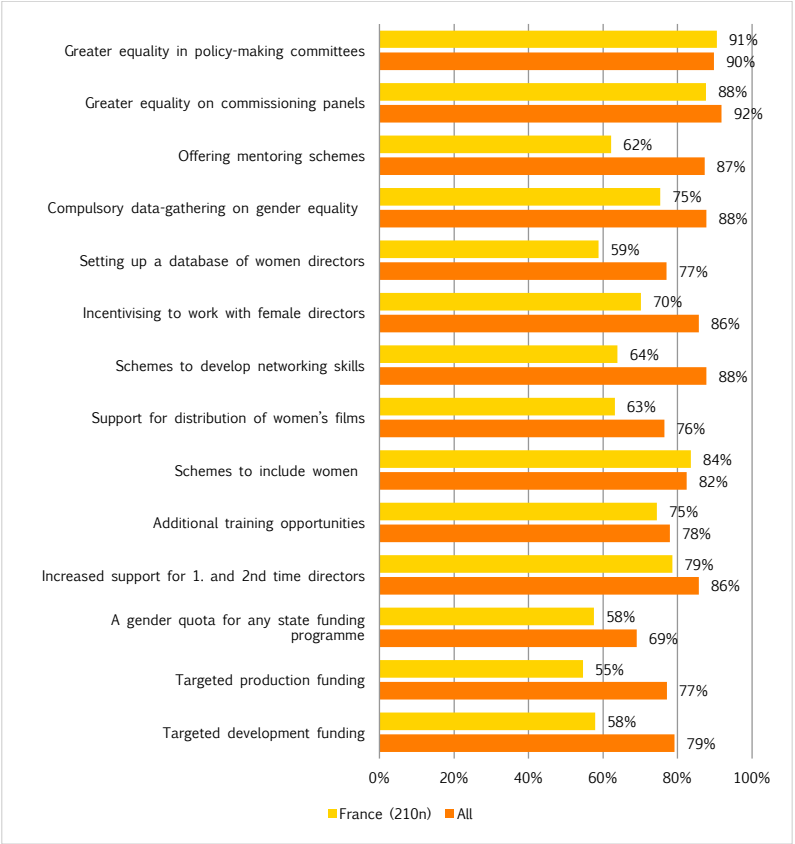
Figure 28: Policy measures: important



Source: EWA report database - Questionnaire

Other comments

Seven comments urged measures to incentivise commissioners/gatekeepers, including greater representation on panels.

Four comments urged support for parents/directors, particularly during the directing period.

There were also comments urging more support for development, making

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applications to the CNC anonymous and encouraging meetings between women directors and distributors.

Others urged more support for women to direct genre movies; incentives to encourage producers to work with first-time directors; awareness raising on equality in commissioning/festival selection panels and insisting on data gathering by the broadcasters.

Annexes

SUPPORT	BENEFICIARIES	OBJECTIVES	2013 RESULTS
Automatic support for film distributors	Distributors of films in theatres	Finance a guaranteed minimum to be refunded based on film revenue in theatres and/or bear part of publishing expenses	41 distribution companies raised €21.1 million for 111 films
Support for newly released films (1st board)	Distributors of newly released films in theatres 4 procedures: - support on a film-by-film basis - support for first films - advance on receipts - support for distribution companies (subsidies for structure and for programme) - support for under-screened films	To encourage cultural diversity by distributing new French and foreign films in movie theatres	€7.8 million for 257 films and 17 production structures supported
Support for old art-house films (2nd board)	Distributors of heritage films in theatres 2 procedures: - support for old art-house films and	To promote screening of old art-house films in theatres throughout the country	€825,000 for 53 films, 5 retrospectives and 9 production structures supported

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	retrospectives - support for old film companies (production structure and programming support)		
Support for films for "young audiences" (3rd board)	Distributors of films in theatres aimed at young audiences (new films and reruns)	To renew and diversify what is offered to young audiences in theatres by financing teaching aids and accompanying documentation	€220,000 for 20 films

Source: CNC, CNC support for distribution.

APPENDIX IV

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GERMANY

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Introduction & Methodology

This report on Germany is one of seven national reports contributing to the research project "Where are the Women Directors in European Cinema?" conducted by the EWA network.

The report findings are based on two main sources: 1) a quantitative analysis providing available data on the presence of women directors and their films in the German industry; 2) a questionnaire distributed to members of the industry, which nearly 900 respondents across Europe answered. Of those 162 are based in and answered for the German situation. Findings from both sources are presented alongside in this report to complement the emerging picture.

Additional information stems from a report on the situation of women in the German feature film industry that was conducted at the Institute for Media Research at the University of Rostock by Prof. Dr. Elizabeth Prommer and Dr. Skadi Loist and published in February 2015.[1]

Women in the German film industry

Female and male careers in the media develop differently. Executive positions are still dominated by men. This is also true for creative professions in audiovisual media. It seems that hardly anything has changed in the last few years, professional roles and career opportunities of the involved parties have largely stayed the same.

Studies on film school alumni – Jenke (2013) for the HFF-Potsdam, now Filmuniversität Babelsberg, and Slansky (2011) for the HFF-München[2] – show that since the turn of the century about half of the alumni of directing courses are female. These alumni data suggest that there is a potential for 40-50 percent of films being realized by women.

The current situation: Although nearly half of film school alumni are women, they only receive 10 percent of the film funds. A study conducted by the director's guild

[1] Prommer, Elizabeth, and Skadi Loist (2015). *Who Directs German Feature Films? Gender Report: 2009-2013.* Rostock: Institut für Medienforschung, Universität Rostock, 2015. <http://www.imf.uni-rostock.de/fileadmin/PHF_IMD/Bilder/News/Gender-Report-German-Film_2009-2013_2015-English.pdf>. (19. Feb. 2015)

[2] Jenke, Marion (2013): *Berufswege von Alumni einer Filmhochschule. Arbeitsmarktsituation und Spezifika des Studiums.* Wiesbaden: Springer VS; Slansky, Peter C. (2011): *Filmhochschulen in Deutschland. Geschichte – Typologie – Architektur.* München: edition text + kritik.

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(*Berufsverband Regie*) showed that only 11 percent of prime-time television productions have been realized by women.[3]

In response to this situation, a group of female directors came together in summer 2014 – similar to female journalists in the Pro-Quote group – in order to highlight the dramatic underrepresentation of projects realized by female directors when it comes to the allocation of funding. Among the renowned signatories of a petition for gender-balanced allocation of film funding are Dories Dörrie and Connie Walther.[4]

The publicity resulting from public debates demanding a quota system initiated by Pro Quote-Regie lead to some substantial results. The publication of the embarrassing data, showing that only 11 percent of prime-time public broadcast TV is directed by women, has changed the policy for the public broadcaster ARD. In the next few years they want to raise this share to 20 percent. At the moment a new film funding policy is being discussed and the drafts include a law to have equal gender representation in the commissioning and funding committees and juries.[5]

Analysis of structural industry data

The present analysis covers industry data for all German feature films that premiered in the years 2009–2013. Data was collected on funding (according to FFA Annual Reports), box office, attendance, and co-production status. In addition, the gender for director, producer, DOP and screenplay have been collected, as well as number of prints on the release date, co-production with television and success of the festival run. For a sample year (2013) we also coded the number of international and national awards and nominations, as well as participation in national and international festivals.

The budget was extrapolated based on data from the First Directing Diversity Report of the director's guild (*Erster Regie-Diversitätsbericht des Bundesverbandes Regie*). Further data was collected from German industry databases: mediabiz.de, filmportal.de and german-films.de.

The basis for the industry analysis were 687 films in the time period 2009–2013. Of those, 627 can distinctly be assigned to a male or female director, while 60 films

[3] Bundesverband Regie e.V. (ed.) (2014): Erster Regie-Diversitätsbericht des BVR 2010-2013. Analysen zur Regievergabepraxis in den fiktionalen Primetime-Programmen von ARD und ZDF sowie Genderreport zum deutschen Kinofilm. Berlin. p. 6.

[4] www.proquote-regie.de

[5] *Diskussionsentwurf der Beauftragten der Bundesregierung für Kultur und Medien: Entwurf eines Gesetzes über Maßnahmen zur Förderung des deutschen Films (Filmförderungsgesetz - FFG).* 9.11.2015. <http://content1.mediabiz.de/download/151109_FFG_Diskussionsentwurf.pdf>. (01. Dec. 2015)

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have been realized with directing teams and are neglected for the current analysis. The following analysis is, thus, based on the 627 films with unambiguous assignment.

This analysis provides an inventory for the gender distribution in German film production. In order to identify the reasons behind the present disparities and assess the sentiment regarding gender equality and equal opportunity in the industry a questionnaire has been developed in a second step.

Online questionnaire

In July 2015 the EWA online questionnaire was distributed in Germany via the director's guild, the two major film schools (HFF München and Filmuniversität Babelsberg), via the German Federal Film Board (Filmförderungsanstalt – FFA), and different industry networks. The German EWA questionnaire was answered by 162 respondents, which accounts for 18 percent of the total sample of 898 respondents. Assuming the questionnaire was distributed to about 1.000 people, a return of 162 equals 16 percent and is satisfying for an online questionnaire.

Most of the respondents of the German questionnaire are female (89%), only 11 percent (18n) are male. This does not represent the gender distribution in the field. We do have over-proportionally many answers from women, as has also been the case in all other countries in the EWA study, except Sweden and Croatia (33-35%). Comparisons of answers given by women and men take this difference into account during interpretation. However, as a difference between available answers is hardly discernible, the numbers in this report are given without gender breakdown. Where a specific difference is of importance it will be noted.

This report shows the summary of the top two answers ("applies fully" and "applies", or "very important" and "important", respectively).

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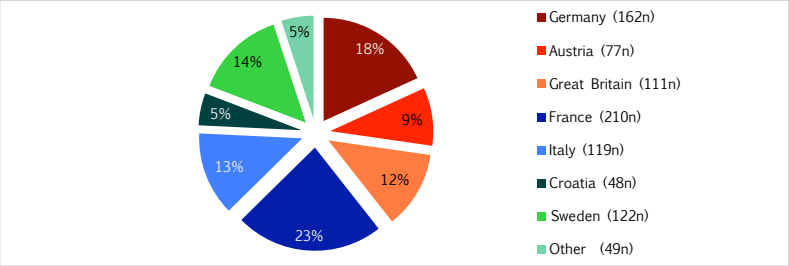
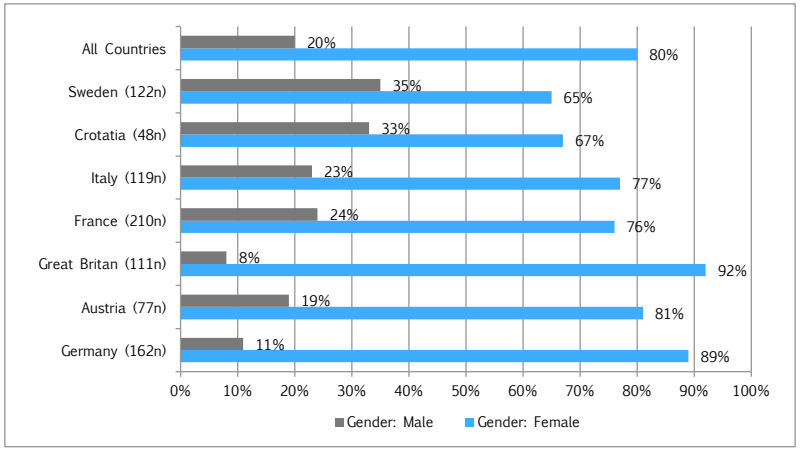
Figure 1: Number of questionnaire respondents according to country



Source: EWA report database – Questionnaire
Note: n = number of respondents

Figure 2: Gender distribution of EWA questionnaire respondents by country (all 898n)



Source: EWA report database – Questionnaire
Note: n = number of respondents

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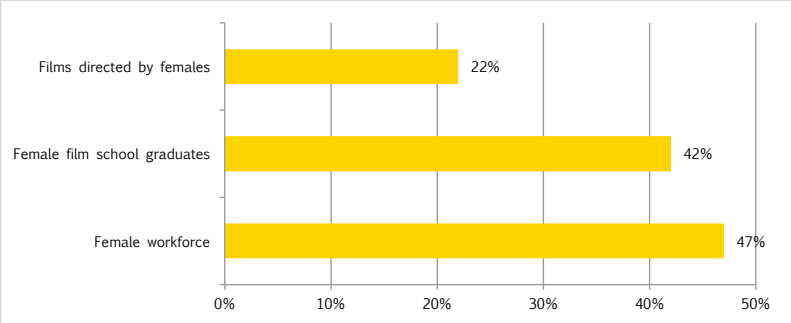
I. Summary of findings

In an overall population of 80 million people, Germany shows a gender composition of 51 percent women and 49 percent men. The proportions change slightly considering the working age population (of 52,5 million) with 49,9 percent women to 50,1 percent men; and 40 million in employment of which 46,7 percent are women and 53,3 percent men. Considering these proportions, the share of 40-50 percent of women being admitted and graduating from film schools seems to be a sign of equality going into the business.

However, considering the percentages of women who are actually working in the film business – 25 percent of the registered members of the directors' guild are women; 22 percent of feature films between 2009-2013 have been directed by women – something seems to be going considerably wrong once women try to enter the work force in the film industry.

There is a major dropout of woman, who cannot direct films after graduating from film school.

Figure 3: Disparity of active female directors and gender workforce.



Source: EWA report database - Survey

Almost all (95%) of the German respondents (women and men) are aware of the inequality of the film industry, this is the highest value within Europe.

Most of the film funding money (83 %) in Germany goes to male-led film projects. Only 17 percent of the money spent for federal funding is spent on films with a female director. In addition to this imparity, female-led films get less money for their projects; in average they only receive 65 percent of a male-led project. Over half of

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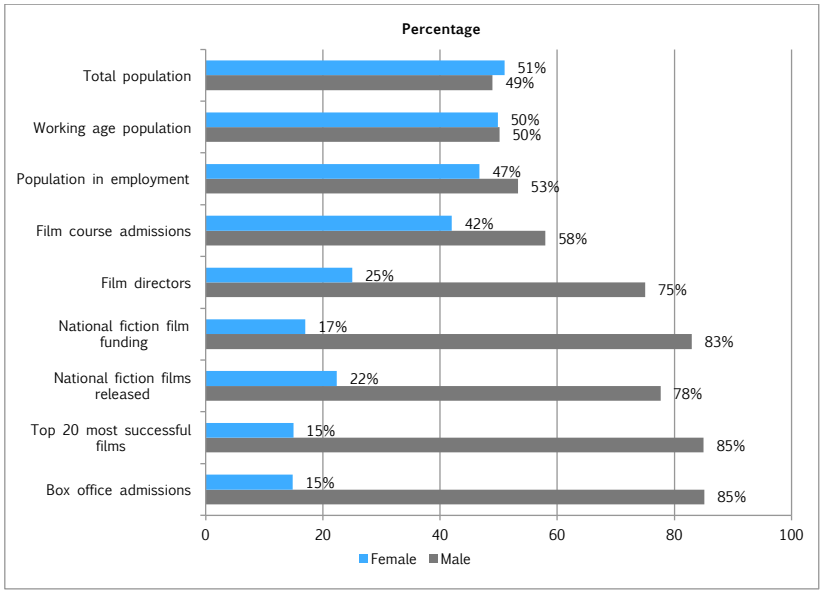
the respondents had the feeling, that a female director of a film project influences the financing of the film negatively.

With less money, women succeed in directing high quality: Looking at the awards and festivals for the year 2013 and comparing this to the European average we see that German films by female directors do especially well with national awards and at festivals. In almost every category films directed by women do better than films directed by men, this holds true both for German films and the European average: they show at more festivals, nationally and internationally.

To change this imbalanced industry three out of four (77%) respondents believe that a quota for state funding will help, even though this is a highly debated policy.

Figure 4: Gender shares across key indicators for German film industry.



Source: EWA report database - Survey

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II. Recommendations for action

Obviously various measures are needed to create equal opportunities to keep trained and skilled women working within the business.

In accordance with the answers from German respondents to the EWA questionnaire (see section 12.3 Measures to encourage women directors into the industry) the following measures seem most obvious and are supported from the industry, which the respondents are a part of.

1) The first recommended measure is to continuously and consistently monitor gender balance in the field. Thus, all film industry bodies (film funds, broadcasters, producers) – who receive public funds – should keep mandatory statistics on gender balance in the field.

2) Selection juries, policy-making commissions and commissioning boards should be composed with gender parity. (In a draft of the film funding law that is currently discussed this measure is already proposed to be implemented.)

3) Targeted (production) funding and incentives for producers to work with women are considered important. To ensure equal opportunities for female directors a quota system should be implemented, which ensures equal funding opportunities and also encourages producers to hire female directors.

4) General awareness-raising measures for all decision-making bodies in the industry.

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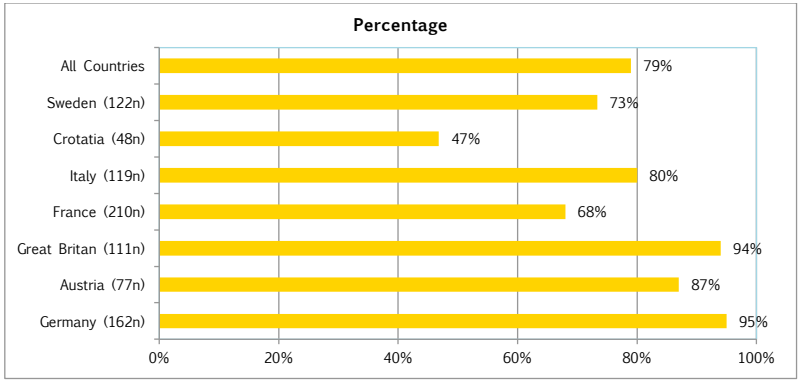
III. Women's presence in the industry

3.1 Does gender inequality exist?

Most respondents of the questionnaire believe that there is gender inequality in the business. Even the men state this perceived inequality. Respondents in Germany and Great Britain are leading the chart with answers in the perceived gender imbalance. Interestingly in Croatia and France the respondents believe less in the gender imbalance, which might be explained by the bigger share of male respondents in those countries and different national rhetorical discourses around gender equality and equal opportunities.

For Germany we note that gender inequality in the business is perceived over-proportionally compared to the European average.

Figure 5: Do you think gender inequality exists for directors in your national industry? Yes.



Source: EWA report database - Questionnaire

Note:

1. Percentage basis: each country = 100%
2. n = number of respondents

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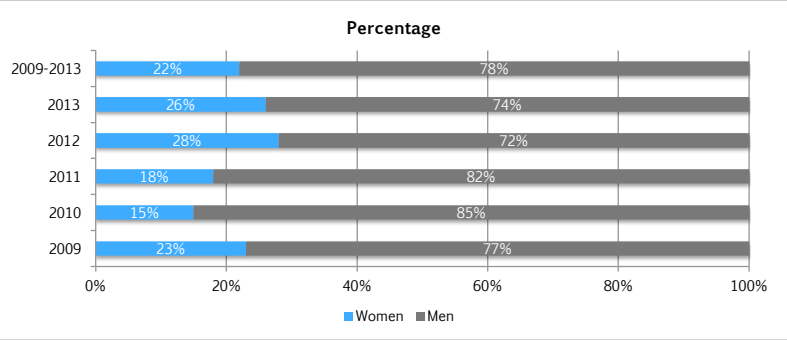
3.2 Number of working directors

In Germany 580 directors are registered members in the director's guild, 75 percent of them are male and only 25 percent female.[6] There is an obvious dropout between film school graduates and working directors in the field.

In the years 2009–2013, only 22 percent of the films were directed by women. This number fluctuates in the individual years. Most women-directed films appeared in 2012 (28%) and the least amount appeared in 2010 (15%).

Figure 6: Percentage of female directors, feature films 2009–2013



Source: EWA report database - Survey

For the other positions of the films released 2009–2013 there is only a small share of women to be detected. Only 14 percent of the screenplays have been written solely by a woman, 12 percent of the films were shot by female DOPs and less than every tenth film (9%) of the films was produced by a woman. If teams are taken into account, a share of 41 percent of the projects has been realized by producer teams which included women. For screenplays it was one third (34%) of the projects.

In all positions women are clearly underrepresented. This is also true in view of the potential from graduates of film schools and universities.

[6] Bundesverband Regie e.V. (ed.) (2014) Erster Regie-Diversitätsbericht des BVR 2010-2013. Analysen zur Regievergabepraxis in den fiktionalen Primetime-Programmen von ARD und ZDF sowie Genderreport zum deutschen Kinofilm, Berlin, p. 91.

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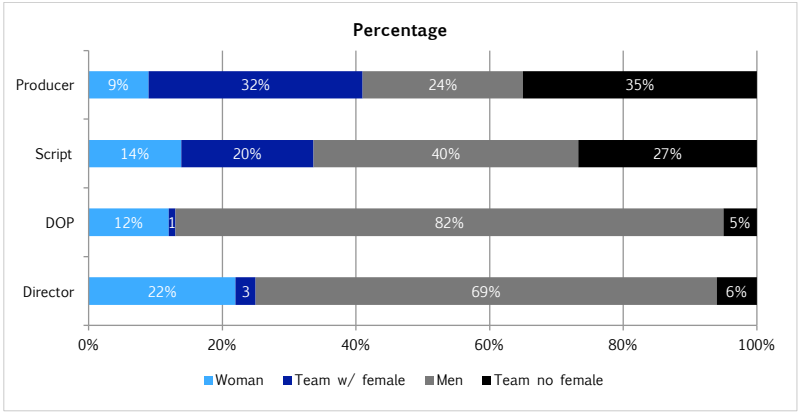
Figure 7: Percentage of women in above-the-line functions, fiction films (2009–2013)



Source: EWA report database – Survey
Base: FFA annual reports

3.3 Numbers of directors in receipt of national funding

Films directed by men and women receive approximately equally often film funding, women even a little more often. 79 percent of women-directed films and 73 percent of films directed by men receive funding.

However, men receive significantly more money than women. Considering all paid-out funds, 83 percent of euros are spent on men. (For details on funds see 5 National Funding)

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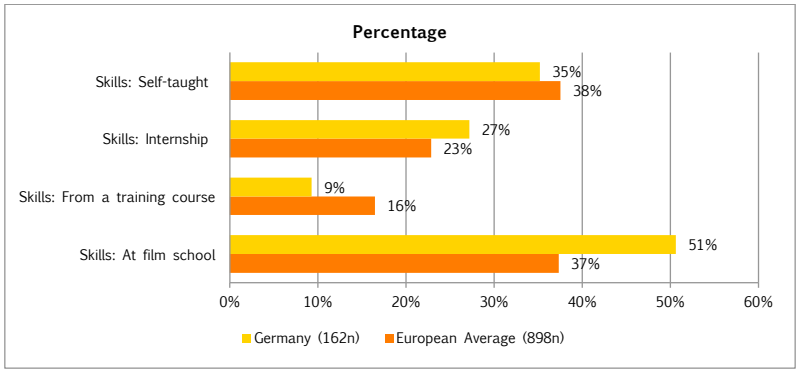
IV. Entry into the industry

4.1 How did you get your skills?

Results from the EWA questionnaire show the following picture: Most of the German directors decided to be directors in their early twenties, the average lies at 22 years for the women. Almost none (5n) decided to be directors at a young age, and only very few made their first film younger than 11 years (7n). This is similar to the other countries in the study. Overall only 12 percent decided to be a director at a young age, with Italy leading the group. Even less (9%) made a film at a young age.

Most of the German respondents learned their profession in film school at university level. Two thirds (69%) went to film school to learn the skills to be a director. The ones who did not attend film school worked their way into directing via internships and learning-by-doing. Compared to the European average, the German directors rely more on formal education at film school.

Figure 8: How did your learn the skills for directing? (German vs. European average)



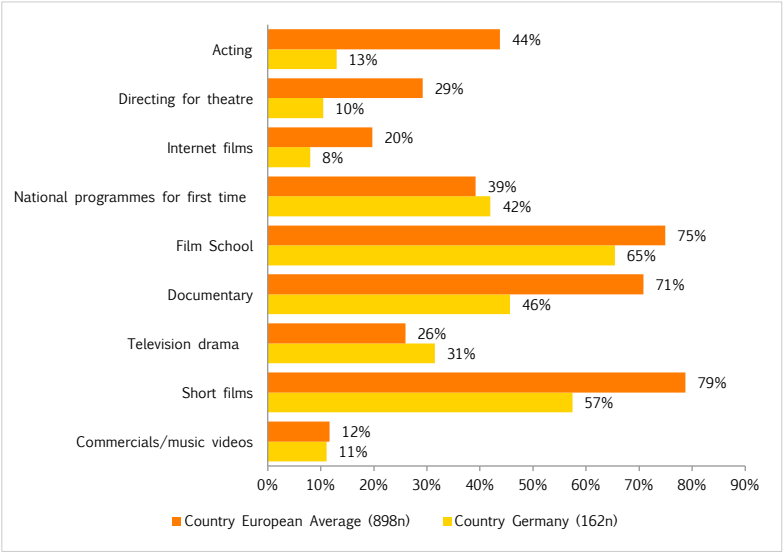
Source: EWA report database – Questionnaire
Note: on the basis of 162 German respondents and 898 overall respondents

4.2 What was your route into directing?

The German respondents consider attending film school and directing short films as the main routes into the field.

Unlike their European colleagues, the German respondents do *not* consider the following to be a way into directing: Acting, directing theatre, commercials and internet films. Here, the German respondents differ significantly from the other countries. Asked "What do you consider the most important entry point for women into film?" respondents from France, UK and Sweden consider acting as very important. Directing documentaries is most important in all countries, except for Austria and Germany.

Figure 9: Which routes into directing do you consider most common for women? (German vs. European average)



Source: EWA report database – Questionnaire
Note: on the basis of 162 German respondents and 898 overall respondents

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4.3 Presence in film school

The film school graduates vary from 49 percent of female directors finishing the Munich film school in 2015 and 40 percent graduating from Potsdam (2010)[7].

Studies on film school alumni – Jenke (2013) for the HFF-Potsdam, now Filmuniversität Babelsberg, and Slansky (2011) for the HFF-München[8] – show that about half of the graduates are female. Slansky reports a share of 48 percent women at the HFF München. Since most students are enrolled in the directing program there it can be conferred that only slightly less women than men leave the HFF München as directors. At the Filmuniversität Potsdam Babelsberg the distribution per program is very unequal. While in the editing program mostly women are enrolled, there are far less women in the camera and sound classes. In directing and production there are also more men than women, with a 60:40 ratio.

These alumni data suggest that there is a potential for 40-50 percent of films being realized by women.

[7] Data provided by the film schools.
[8] Jenke, Marion (2013): *Berufswege von Alumni einer Filmhochschule. Arbeitsmarktsituation und Spezifika des Studiums.* Wiesbaden: Springer VS; Slansky, Peter C. (2011): *Filmhochschulen in Deutschland. Geschichte – Typologie – Architektur.* München: edition text + kritik.

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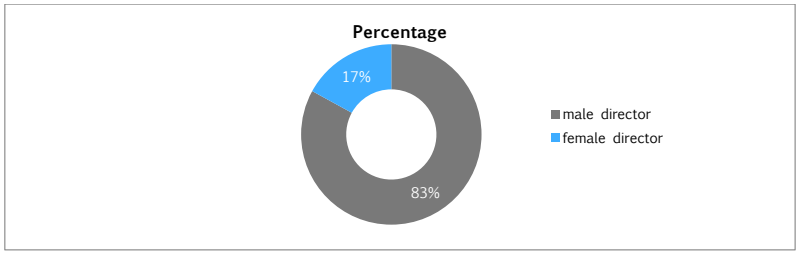
V. National funding

5.1 National production fund – Fiction

Most of the film funding money (83%) in Germany goes to male-led film projects. Only 17 percent of the money spent for federal funding is spent on films with a female director. In addition to this imparity, female-led films get less money for their projects in average.

If one considers only those projects that received funding, further discrepancies and inequalities between films directed by men and women become apparent. In sum, films directed by women receive only about 65 percent of the funding that films by men receive. On average, considering only funded projects, a film directed by a woman receives 660.000 euros film funding, while a film directed by a man received 1.000.000 euros.[9]

Figure 10: Gender distribution of national film funding, fiction (2009-2013).



Source: EWA report database - Survey

[9] The present study does *not* work with the commonly used percentage based on the overall number of films when considering the analysis of women-directed films. In such a calculation the known inequalities and gender-specific injustices distort the results regarding qualitative and financial success. If women direct less films they accordingly will receive less funding.
In order to compare the quality of films by men and women objectively the percentages refer to the total amount of films made by men and women respectively. That is, unless otherwise stated, the represented numbers refer to the basis of 100 percent of films in the time period 2009–2013 that have been realized by women or alternatively to 100 percent of films which have been realized by men in the same period. Only this way allows to identify differences and similarities in films directed by men or women.

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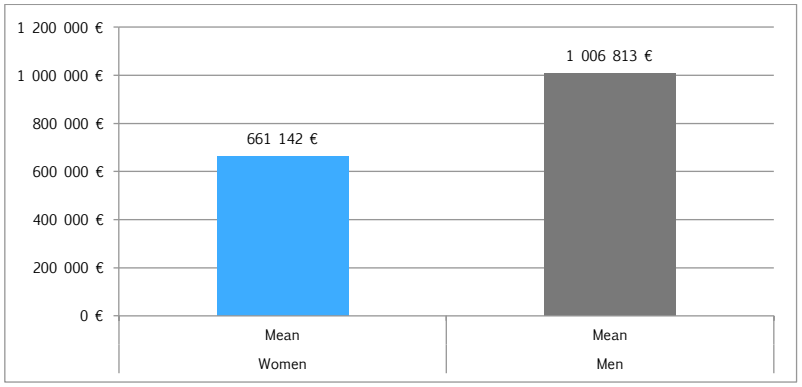
Figure 11: Average funding of films by gender – Sum of all federal funding in €



Source: EWA report database – Survey
Base: funding data from FFA, BKM and DFFF

Apart from a number of regional film funds (see 5.5) Germany has three major national funding schemes. The German Federal Film Board (FFA) awards money to projects in different stages and with different funding programs. The funding scheme from the Minister of State for Culture and the Media (BKM) is a more clearly artistically inclined film fund. The German Federal Film Fund (DFFF) is a quasi-automatic funding scheme, which awards grants on the basis of budget size.

These funds show differences in terms of gender equality. While the amount of funding through the German Federal Film Board (FFA) and the Minister of State for Culture and the Media (BKM) do not show great differences, the discrepancy for the German Federal Film Fund (DFFF) is the most obvious.

While the FFA-Production funding shows less differences, the DFFF disburses over-proportionally more funds to projects directed by men than by women. Marketing and distribution funding shows similar inequalities. Projects with male directors received markedly more money.

The DFFF is the funding with the most obvious gender inequality. Women-directed films receive about half of the sum that films directed by men receive. This quasi-automatic funding based on budget size clearly disadvantages women.

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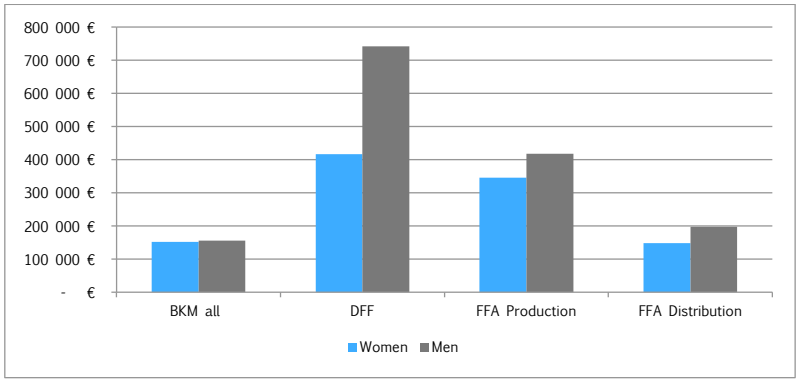
Figure 12: Average federal funding by institution and gender (feature fiction film, 2009-2013)



Source: EWA report database – Survey
Base: funding data from FFA, BKM and DFFF

Accordingly, this means that a project directed by a woman compared to a project directed by a man only receives 65 percent of the funding; the funding by the BKM is nearly equal (98%). The FFA funds a woman-led project by 83 percent and only 75 percent of the means provided by FFA-distribution funding to a man-led project. The DFFF funds women with 56 percent of its sum.

Summary: Percentage of the sum that films directed by women receive in comparison to films by men.

- Sum of overall film funding: women receive 65 percent of the sum that men receive
- BKM: women receive 98 percent of the sum that men receive
- DFFF: women receive about half (56 %) the sum that men receive
- FFA Production funding: women receive 83 percent of the sum that men receive
- FFA Distribution funding: women receive three quarters (75 %) of the sum that men receive

If we also consider the other positions, further over-proportional gendered differences become apparent. As producers women receive more rarely funding than men. Projects by female producers only receive funding in 57 percent of cases,

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projects by men however are awarded funding in 66 percent of cases. Here also, women only receive a fragment of the sum that men receive with 75 percent of the amount. This is a smaller difference than for directing.

It does not seem to matter who writes the screenplay, projects with a male DOP however also receive funding in more cases.

In respect to producers, the BKM is again the funding agency with most gender equity. Here, projects with female producers receive more money than projects where no women are involved. Overall all projects with male producers and production teams receive the most money.

5.2 Regional funds

The German funding landscape is very dispersed. Apart from the national funding schemes mentioned above, funding follows a regional funding logic. Historically the German cultural and media sector has been structured by region in a decentralized system since World War II, giving the federal states – or connected regions – the decision-making power on the cultural sector.

Thus, in Germany there are several smaller and three major regional film funds, which award money to projects on an individual basis. This regional data is not easily available or comparable. Therefore, they had to be omitted for the present study.

5.3 Size of production budgets for female and male directed films

The budgets of films for cinema are hard to estimate since those numbers are not publicly available. The extrapolation and estimate presented here follows the Diversity Study of the director's guild – Bundesverband Regie (BVR) and uses the same categories:

„LB (low budget) designates films with a low budget up to two million euros, MB a medium budget ranging between two and five million euros and HB a high budget above five million euros. In single cases the international financial share or the money of private investors could not be determined und taken into account for the extrapolation." (Erster Regie-Diversitätsbericht der BVR, 2014)

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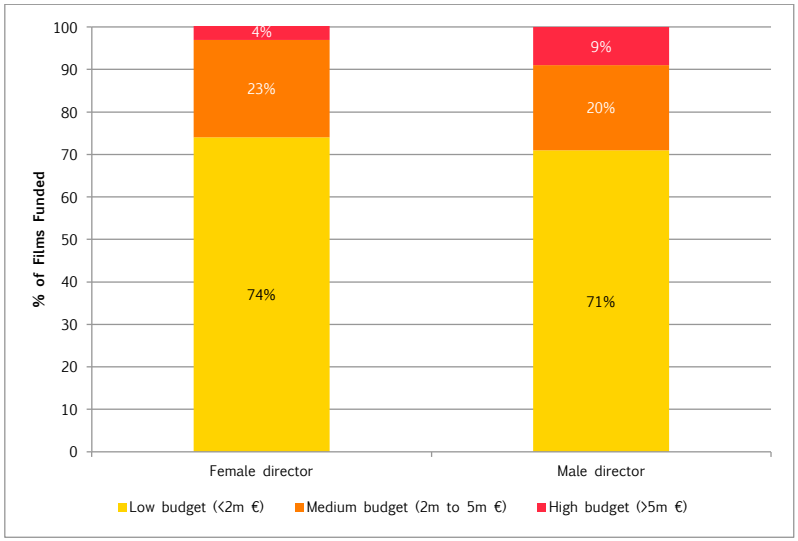
Figure 13: Share of films funded by budget category (2009-2013)



Source: EWA report database – Survey
Base: funding data from FFA, BKM and DFFF
Note: The percentage refers to the total of all films either directed by women or all films directed by men.

Only few films (8%), realized by either by men and women, have an estimated budget exceeding 5 million euros. But if we compare films by women with those by men, it becomes apparent that women are further underrepresented. Only 4 percent of all films directed by women have such a budget, while twice as many men (9 %) could work with a high budget. Accordingly, the share of women who need to work with a low budget is higher. Women not only direct only a fifth of the films, in addition they are significantly underrepresented in the high-budget segment.

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VI. Investment by broadcasters

Data on broadcast funding is not easily and publically available and thus had to be omitted for the current study.

In general terms however, it needs to be noted that in Germany public broadcasters are an important factor for the film and media industry. For one, television is an important sector for steady employment for directors when the financing of films for cinema is difficult. Also, apart from being producers of TV movies, broadcasters are important co-producers for film geared towards cinema.[10]

For these reasons the results of the diversity report by the director's guild (Bundesverband Regie) cannot be overestimated. Their study shows the blatant underrepresentation of women as directors for prime-time television. The small fraction of 11 percent of women-directed fictional work (series, serials and TV movies) is significantly lower than that the percentage of productions directed by women in film (cinema) (22%) and documentary (cinema) (31%).[11] In some of the prestigious series and genre segments, for instance in popular prime-time crime series (e.g. *Tatort*) women directed even as little as 5-9 percent of the regular episodes.[12]

The continued public discussions since the founding of the lobby initiative ProQuote Regie resulted in September 2015 in an announcement by Degeto, the affiliated production company of public broadcaster ARD, of a projected target that at least 20 percent of their productions (also of the prestigious *Tatort* episodes) will be directed by women.

[10] Bleicher, Joan Kristin (2013) *Die mediale Zwangsgemeinschaft: Der deutsche Kinofilm zwischen Filmförderung und Fernsehen*, Berlin: Avinus.
[11] Bundesverband Regie e.V. (ed.) (2014) Erster Regie-Diversitätsbericht des BVR 2010-2013. Analysen zur Regievergabepraxis in den fiktionalen Primetime-Programmen von ARD und ZDF sowie Genderreport zum deutschen Kinofilm, Berlin, p. 6.
[12] Ibid., p. 24.

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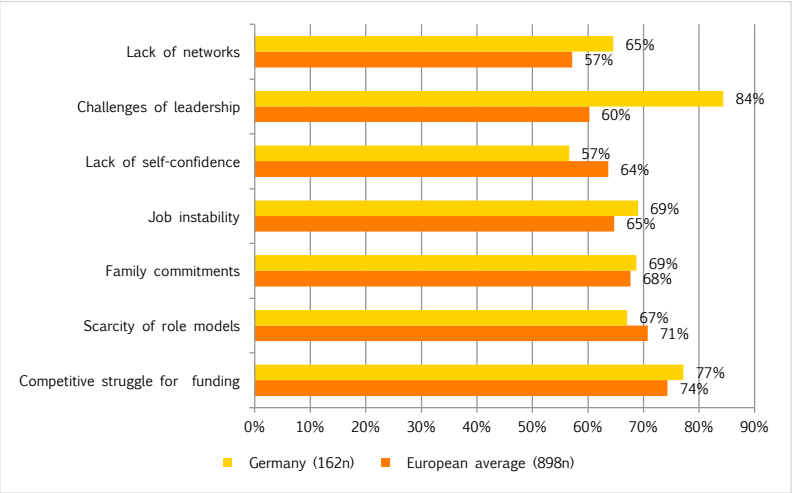
VII. The challenges faced by female directors

7.1 What factors discourage women?

When asked what discourages women from working in the field, the German mostly female respondents see their leadership ability challenged (84%). The competitive struggle for funding is also held responsible for the gender inequality. This was mentioned by 77 percent of the respondents.

Two thirds of the respondents see job instability and family commitments as discouraging, as well as missing role models and networks.

Figure 14: What discourages women from directing?



Source: EWA report database – Questionnaire
Note: on the basis of 162 German respondents and 898 overall respondents

The competitive struggle for funding seems to be a bigger issue, since up to two thirds (66%) of the respondents have the feeling that a female director influences the funding of a film project negatively if it is a private fund, and still half (48%) believe in the negative effect for a public fund.

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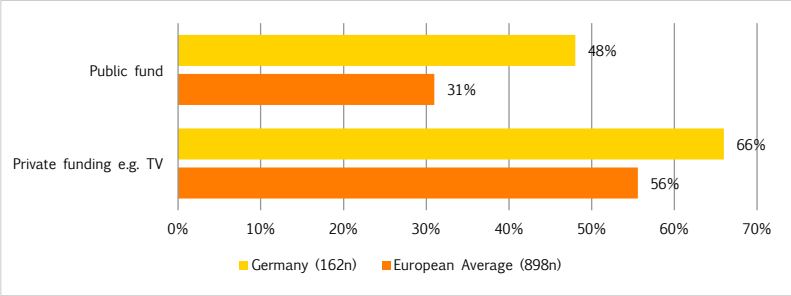
Figure 15: If a project is directed by a woman in your country, how do you think this impacts on public/private funders' decision to fund? Negatively.



Source: EWA report database – Questionnaire
Note: on the basis of 162 German respondents and 898 overall respondents

7.2 What is the impact of being a parent?

Within the German sample of questionnaire respondents 32 directors (30 women and 2 men) are parents (30%). They do *not* believe (82%) that parenting has kept them from being directors.

While respondents to the questionnaire stated that there have been negative experiences with gender-based discrimination in the industry, gender pay gaps and exclusive and exclusionary male network mechanisms, parenting has not specifically been mentioned as something that discourages (female) directors from pursuing work in their primary profession.

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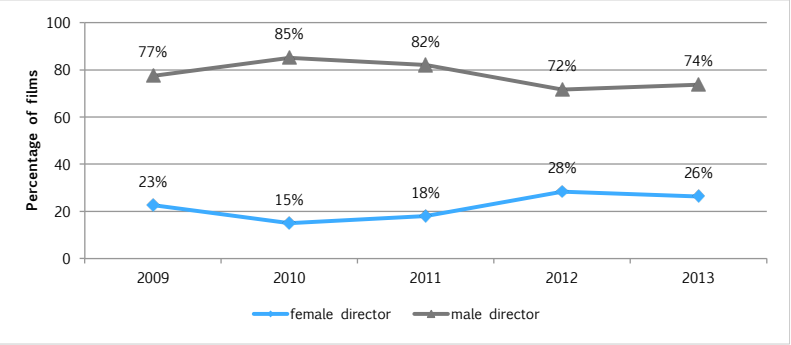
VIII. Releases

8.1 Share of national fiction releases

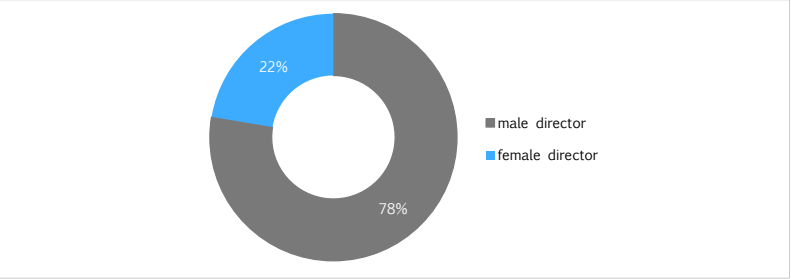
In the national share of fiction film releases, on average films directed by women make up slightly more than a fifth (22%) between 2009 and 2013 compared to more than three quarters of films released were directed by men (78%).

Figure 16: Percentage share of national fiction films released by gender of director (2009-2013)



Source: EWA report database - Survey

Figure 17: Percentage share of national fiction films released by gender of the director (2009-2013)



Source: EWA report database - Survey

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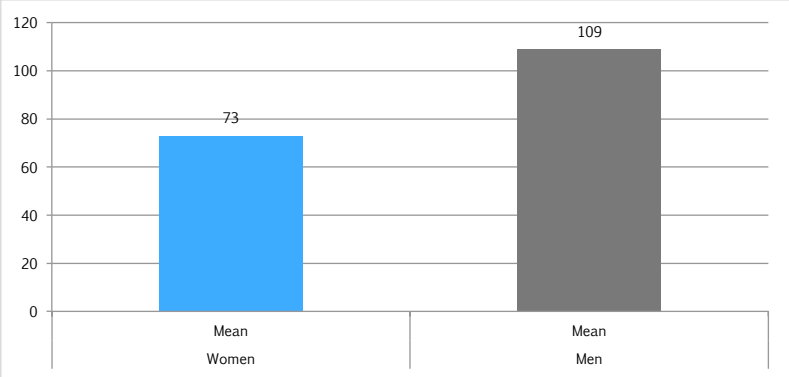
Films directed by women do not only on average have a smaller budget but their films are also released with smaller numbers of prints. This is only to a small degree related to the fact that women direct fewer potential box-office hits. Instead, their films have a smaller budget, less funding and accordingly less commercial potential and therefore are often released with a smaller number of prints.

Even in the category of low-budget films, with a budget below 2 million euros, the amount of prints is significantly smaller than those for films directed by men. Similarly, in the high-budget category the percentage of prints for women-directed films is lower than for films directed by men. For low-budget projects the number of prints only reaches about half (52%) of those for films directed by men; in the medium budget range it is 15 percent less, i.e. 85 percent.

Figure 18: Average number of prints in the opening week by gender, German feature fiction films (2009-2013)



Source: EWA report database - Survey

8.2 Assumptions on women's share of film releases

The majority of men and women (79%) who answered the questionnaire seem to be aware that the percentage of national female-directed films released averages around one fifth (22%) and thus estimated the release average for less than 20 percent (82% of women and 61% of men). Only about one fifth of the respondents (19%) thought that 20-30 percent of national releases had been directed by women, interestingly the men here were much more optimistic (17% of women and 33% of men estimated this).

Respondents were more optimistic in terms of European releases, since 64 percent of them think the percentage of female-directed works is between is less 20 percent (64% of women, 67% of men), while a third (32%) of the respondents estimate that the European average of releases was directed by women lies between 20 and 30 percent (33% women, 22% men).

When asked what percentage of the total box office is taken by films made by women, the estimates vary within a range between 1 and 40 percent. The vast majority (44%) believes that only 1-10% of the box-office is generated by films directed by women; 8 percent of respondents estimate it between 10-15% of the box-office and 18 percent of respondents think the share is around 15% of box office.

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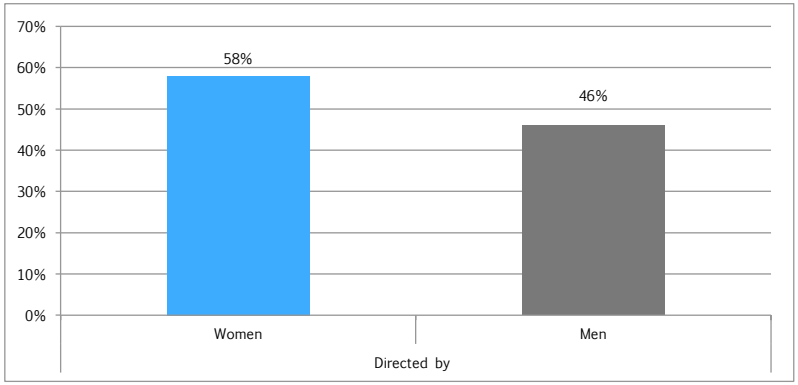
IX. Awards and critical reception

Success of films does not only contain a commercial component. As discussed above, even commercial success is skewed by surrounding factors such as trust by producers and distributors and the chosen release strategies including number of prints etc. Another measure of success is the artistic merit which can be measured by festival runs or awards.

Films directed by women more often win film awards. In contrast to the bigger commercial success of films directed by men, women-directed films are better received by critics and jurors. This is a clear indication for the high artistic quality of films directed by women. From all films, that are directed by women (100) more than half (58%) win an award or are nominated for national or international awards, this only happens for 46 % of the male directed films. Even though the overall numbers are still far less, since there is a much smaller number of female-led films, in proportion, they are more successful.

Figure 19: Film awards by gender of director for German fiction films (2009-2013).



Source: EWA report database – Festivals and awards
Note: on the basis of the total of all films either directed by women or all films directed by men

Nominations and Awards

The basis for the analysis of the festival run are data about festival participation derived from film records available at filmportal.de, german-films.de and mediabiz.de, which list screenings at major festivals on the circuit.

Films directed by women are more often screened at film festivals. More than two thirds (68%) of the films are shown at festivals. On average a film directed by a woman is screened at 3,3 festivals while a film directed by a man is screened at 2,7 festivals.

Film festivals traditionally represent a wider range of film production since the commercial exploitation of films is not their foremost goal, instead they aim for an overview of quality and innovation in filmmaking in its full range. Here, small films, arthouse and art cinema as well as other thematic films find a platform. Festivals are especially important for small films with a small marketing budget in order to gain attention and visibility. Studies show a positive impact of festival selection, positive film criticism and receiving an award at (A-list) festivals for the audience (and box-office) share and it helps films to gain awareness for further commercial exploitation and international distribution.[13]

At festivals smaller films, which received less funding, are screened. Although films directed by women have a smaller budget they have a more successful festival run.

Films directed by women screen at a significantly higher diversity of festivals. For women-directed films a higher diversity of festivals and higher international dissemination can be noted.

More than two thirds of the films were screened at a festival. Half of these go on to further festivals, i.e. slightly more than one third (37%) of the films screened at two festivals; 20 percent screened at three to four festivals; only 10 percent screened at six or more festivals. Only 33 films (5%) can be seen as festival hits, which screened at 10 or more festivals.

Films directed by women screen significantly more often at film festivals and are more successful on the festival circuit. This can be explained by specificities of women-directed films, such as low-budget and genre (drama, children's films) which predestine these films as festival films. Nearly 70 percent of films shown at film festivals are categorized as dramas.[14]

[13] Mezias, Stephen, et al. (2011) "Transforming Film Product Identities: The Status Effects of European Premier Film Festivals, 1996–2005," *Negotiating Values in the Creative Industries: Fairs, Festivals and Competitive Events*, eds. Brian Moeran, and Jesper Strandgaard Pedersen, Cambridge, New York: Cambridge University Press, pp. 169–196.
[14] Smith, Stacy L., Katherine Pieper, and Marc Choueiti (2015) *Exploring the Careers of Female Directors: Phase III*, eds. Women Filmmakers Initiative, co-founded by Sundance Institute & Women in Film, Los

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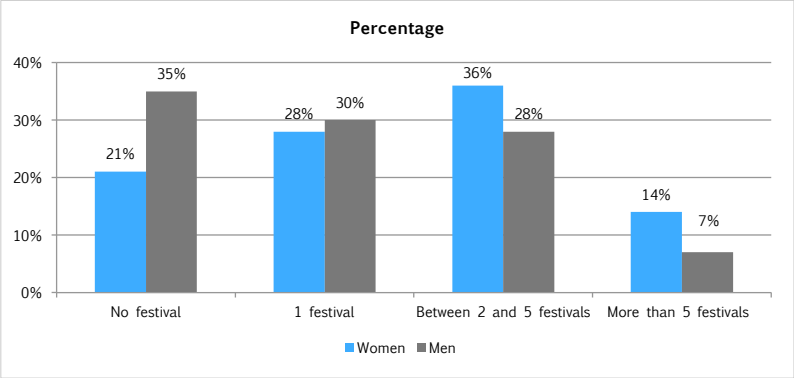
Especially the so-called A-list festivals such as Cannes, Berlin and Venice or internationally acclaimed survey festivals such as Toronto or Vienna are important platforms for film awareness. In recent years, increasing discussions have highlighted and criticized the lack of films directed by women in prestigious competition sections, e.g. at the Cannes film festival.[15] This criticism was met with the argument of a lack of quality of women-directed films. The higher success-rate of films directed by women compared to films directed by men regarding festival run and winning awards, however, seems to debunk that argument. For a more in-depth analysis about the festival run of German films please go to the detailed *Gender Report: 2009-2013*[16].

Figure 20: Festival run by gender of director for German fiction films (2009-2013). / The percentage refers to the total of all films either directed by women or all films directed by men.



Source: EWA report database – Festivals and awards
Note: on the basis of the total of all films either directed by women or all films directed by men

Angeles; Los Angeles, CA: Media, Diversity and Social Change Initiative, Annenberg School for Communication & Journalism, University of Southern California.

[15] See for instance: Silverstein, Melissa (2014). "No Cannes Do: The Status of Women Directors at Cannes Over the Last Decade." *IndieWire - Women and Hollywood*, May 12, 2014. <http://blogs.indiewire.com/womenandhollywood/no-cannes-do-the-status-of-women-directors-at-cannes-over-the-last-decade>. (10 Dec. 2015)

[16] Prommer, Elizabeth, and Skadi Loist (2015). *Who Directs German Feature Films? Gender Report: 2009-2013*. Rostock: Institut für Medienforschung, Universität Rostock, 2015. <http://www.imf.uni-rostock.de/fileadmin/PHF_IMD/Bilder/News/Gender-Report-German-Film_2009-2013_2015-English.pdf>. (19. Feb. 2015)

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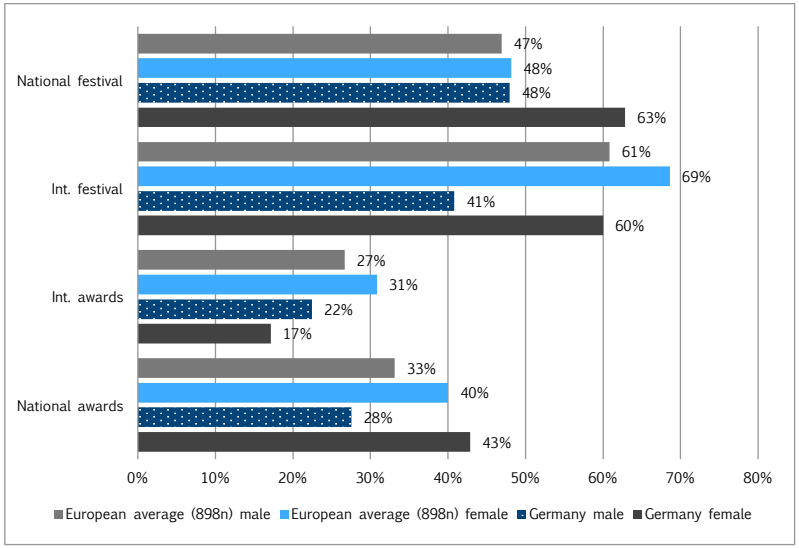
Looking at the awards and festivals for the year 2013 and comparing this to the European average we can see that German films by female directors do especially well with national awards and at festivals. In almost every category films directed by women do better than films directed by men, this holds true both for German films and the European average: they show at more festivals, nationally and internationally. German films did especially well on the festival circuit, with 63 percent of films directed by women and 48 percent of films directed by men showing at national festivals compared to 48 percent and 47 percent of European films directed by women and men respectively showing at the corresponding national festivals. On the international circuit 60 percent of German films by women and 41 percent of German films by men were screened. On the international festival circuit the European average is a bit higher (69% for films by women and 61% of films by men), which is due to exceptional numbers of French films.

Figure 21: Awards and festivals for fiction films in 2013 by gender of director (German vs. European average)



Source: EWA report database – Festivals and awards
Note: on the basis of the total of all films either directed by women or all films directed by men

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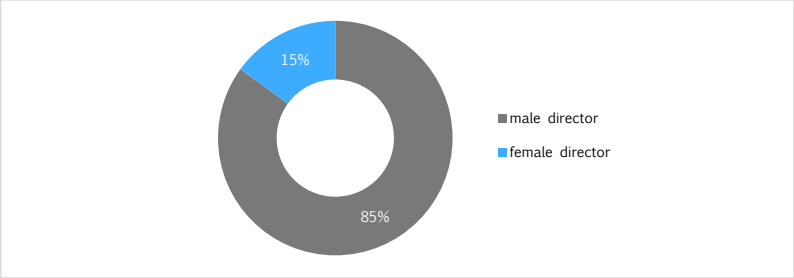
X. Admissions

10.1 Admissions for national funded fiction films

Films directed by men have approximately twice as many spectators as films directed by women. This corresponds with twice the amount of box-office intake. However, this is mostly due to the highly successful outlier films, such as *Der Medicus* (2013), *Fack ju Göhte* (2013), *Männerherzen* (2009) and *Kokowääh* (2011).

Figure 22: Top 20 most successful fiction films (2009-2013) by gender.



Source: EWA report database – Survey

Not a single woman directed one of the films that made more than 10 million euros at the box office. All of those had been directed by men or male led teams. When considering as successful films those films that had more than 1 million spectators, in the five years covered in this report (2009–2013) this applies to only 35 films. Among those only two films have been directed by a woman: *Almanya – Willkommen in Deutschland* by Yasemin Samdereli (2011) and *Wüstenblume* by Sherry Hormann (2009).

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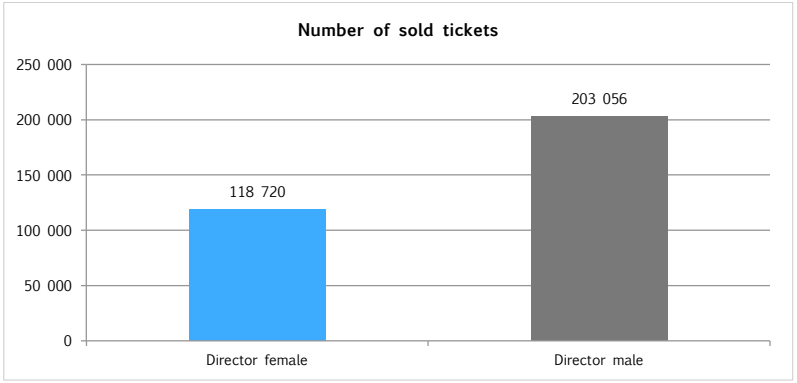
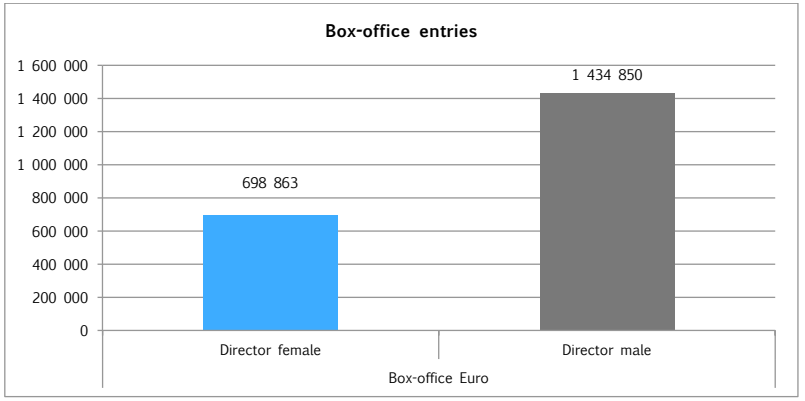
Figure 23: Average number of tickets sold by gender, German feature fiction films (2009-2013)



Source: EWA report database – Survey

Figure 24: Average box-office by gender for German fiction films (2009-2013) in Euro



Source: EWA report database – Survey

It is evident that especially the 35 films which had an audience of over one million and a corresponding box-office income of over 4 million euros are responsible for the significant differences in audience and box-office numbers by gender. When neglecting those films, which only account for 5 percent of all films, for the

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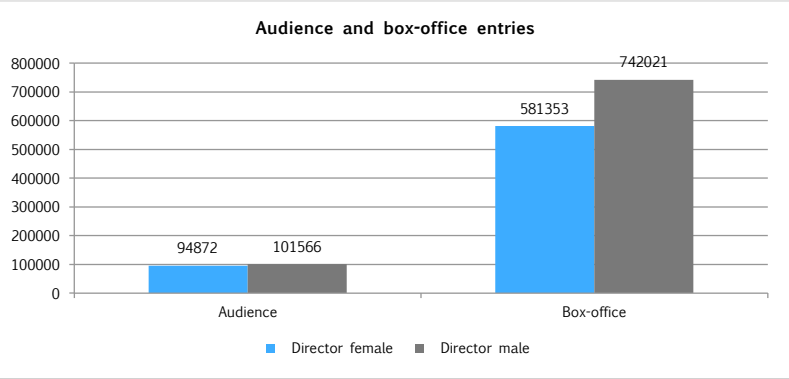
calculation of averages, films directed by men and women only differ slightly in terms of absolute figures of audience. There still remains a difference in box office revenues: A possible explanation for this difference in box-office income in relation to audience numbers is that women more often direct children's films, for which tickets are cheaper.

It is especially the top films directed by men which are successful at the box office. These are also the films with a high budget and high amount of funding. The top films received on average 2.7 million euros of funding while the other films received approximately 800 000 euros. These successful films, furthermore, have an average budget of more than 7 million euros. Half of these films are comedies, which are seldom directed by women.

These films result in the distortion of the differences.

Figure 25: Average box office and audience without the exceptional top-movies, German fiction films (2009-2013).

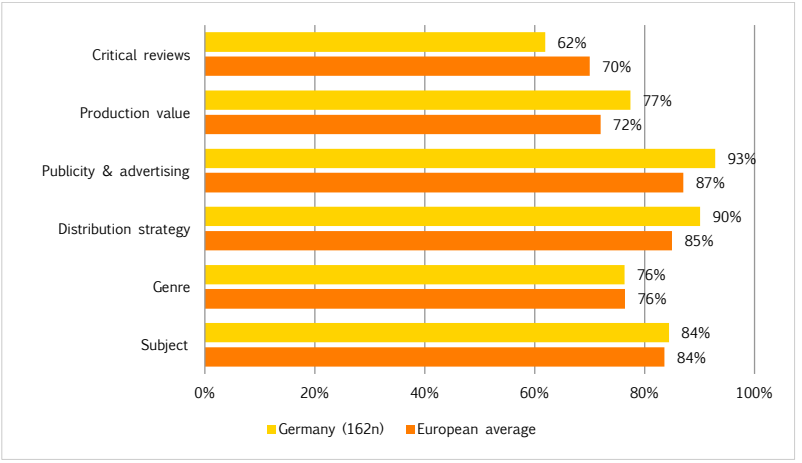


Source: EWA report database – Survey

10.2 What affects box-office performance?

Most respondents agree that the box-office performance is due to publicity and advertising strategy, combined with the distribution strategy and the production value. The German respondents do not differ much from the European average.

Figure 26: What factors affect box-office performance for women's film in your country?



Source: EWA report database – Questionnaire
Note: on the basis of 162 German respondents and 898 overall respondents

10.3 Did the gender of the director affect the choice of a film?

Most respondents have a realistic picture of the representation of women in the national and European industry. Most of them assume that less than 20 percent are women working in the field. They do believe that the gender of the director matters for how a subject is treated (74% in Germany). They do not believe that the gender of the director matters to the audience, but see that films by female directors do better in festivals, than in the cinema. There are no substantial differences between Germany and the European average.

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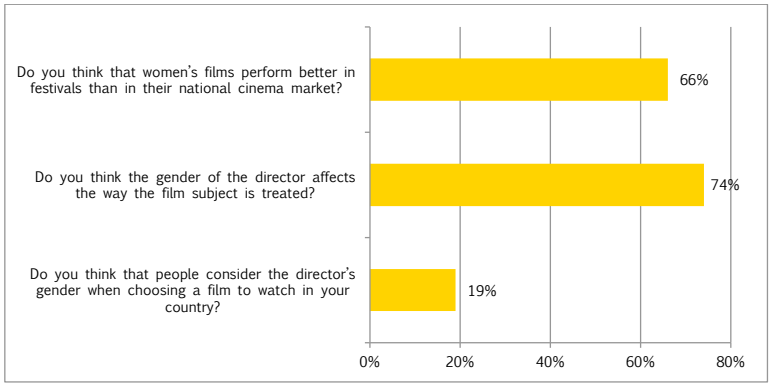
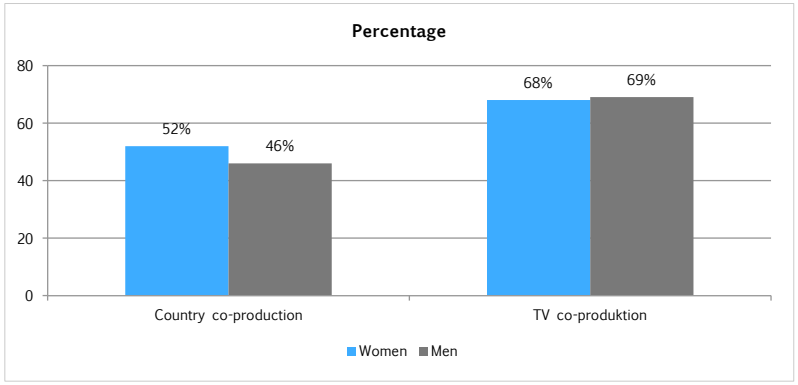
Figure 27: Gender impact on film performance.



Source: EWA report database - Questionnaire
Note: on the basis of 162 German respondents

Women direct more often in international co-productions and work in equal share in projects that are TV-co-productions. This means that although there is a smaller amount of overall projects directed by women, those projects receive the same amount of trust from co-producers.

Figure 28: Co-production and gender, German fiction films (2009-2013)



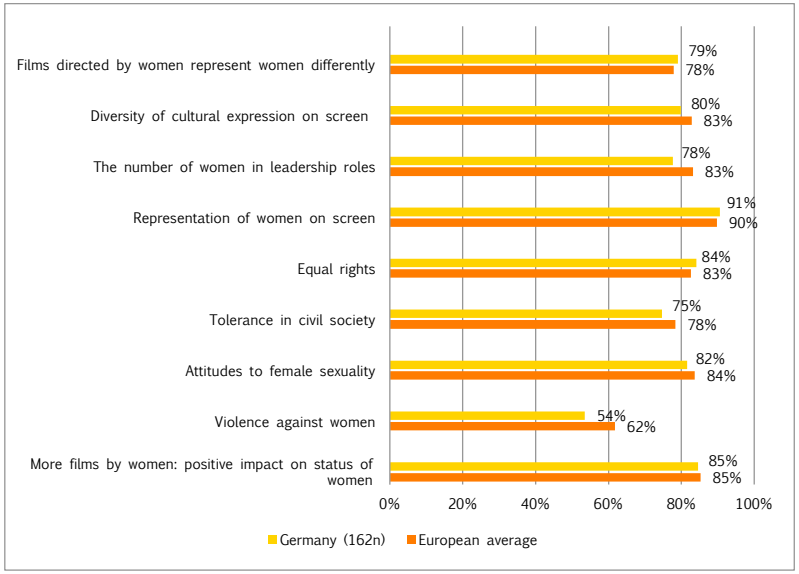
Source: EWA report database – Survey
Note: on the basis of the total of all films either directed by women or all films directed by men

XI. The social impact of more films directed by women

Respondents were asked to consider a range of ways in which increasing the numbers of films directed by women might impact on social culture and practice in Germany. Very many felt that this would change the way women are represented on screen (91%), and many felt that it would have a positive impact on the status of women (85%), promote equal rights (84%), influence attitudes towards female sexuality (82%) and achieve greater diversity of representation on our screens (80%).

In general German responses were close to the average European response in most cases. Germans are less likely to believe that it has an impact on the number of women in leadership roles (78% vs. 83% across Europe). German respondents shared the feeling that the least likely impact would be on violence against women (54%), in fact they believe in this even less than the European average (62%).

Figure 29: What do films directed by women have an impact on? (German and European average)



Source: EWA report database - Questionnaire
Note: on the basis of 162 German respondents and 898 overall respondents

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XII. Changing the picture – Policies for change

12.1 Existing measures for gender equality in the industry

At the end of the year 2015, there are no real measures for gender equality in the business. So far the public broadcaster ARD aims for voluntary self-regulation to raise the share of female directors up to 20 percent in the next few years. In addition the ongoing discussion to have gender parity in funding commissions, has been written into the new film funding law, which is currently discussed in the law-making process.

12.2 Preparing the ground in school education

Among other points we asked in the questionnaire which measures in schools would encourage girls to become directors. Offering media literacy and including films in the curriculum was seen as helpful. Here it needs to be noted that there is no obvious lack in the desire of young women to become directors, since the admissions to films school vary between 42-48 percent. This shows that this is not an underrepresented field of study, such as the so-called MINT (ICT) subjects.

12.3 Measures to encourage women directors into the industry

When asked what could encourage more women to work in the industry, the answers are very clear. Exhibiting more films by women on TV and in cinema, and increasing the support for entry into the business (from training to employment) are important for almost all respondents (9 out of 10). Respondents also consider special funding programs and development schemes, which support women, as very important (71%-81%). School education is still important for 67 percent, but has the least standing.

This ranking corresponds to the overall European sample.

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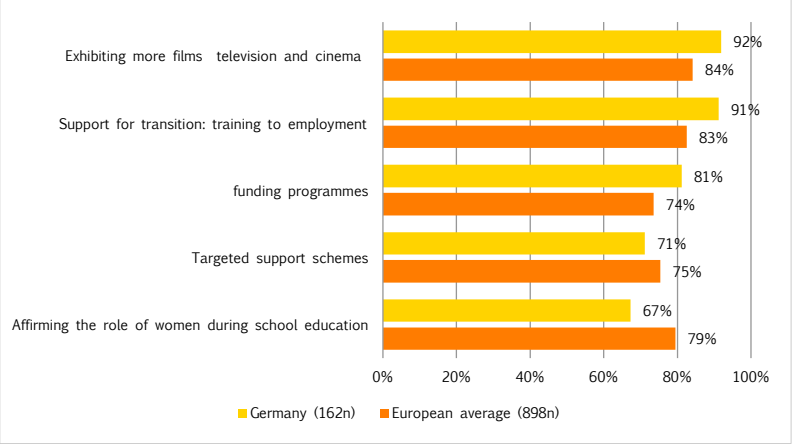
Figure 30: Factors encouraging women into directing (German and European average)



Source: EWA report database – Questionnaire
Note: on the basis of 162 German respondents and 898 overall respondents

Policy measures – What to do for change?

When asked what policy measures are considered important to encourage women to either become directors or remain in the industry, almost all listed policy measures respondents could choose from are considered important by the German respondents. The ranking is roughly the same for all respondents across Europe.

The five highest ranked measures were:

1. Gender equality in the various (funding) commissions is important for almost all (89-91%).

2. Targeted (production) funding and increased funding for first and second films and incentives for producers to work with women are important with a range of 80 to 88 percent.

3. Of the German respondents 84 percent believe that compulsory data gathering can help. While only 64 percent believe that a catalogue (data base) of female directors would help.

4. Three out of four (77%) believe that a quota for state funding will help, even though this is a highly debated policy.

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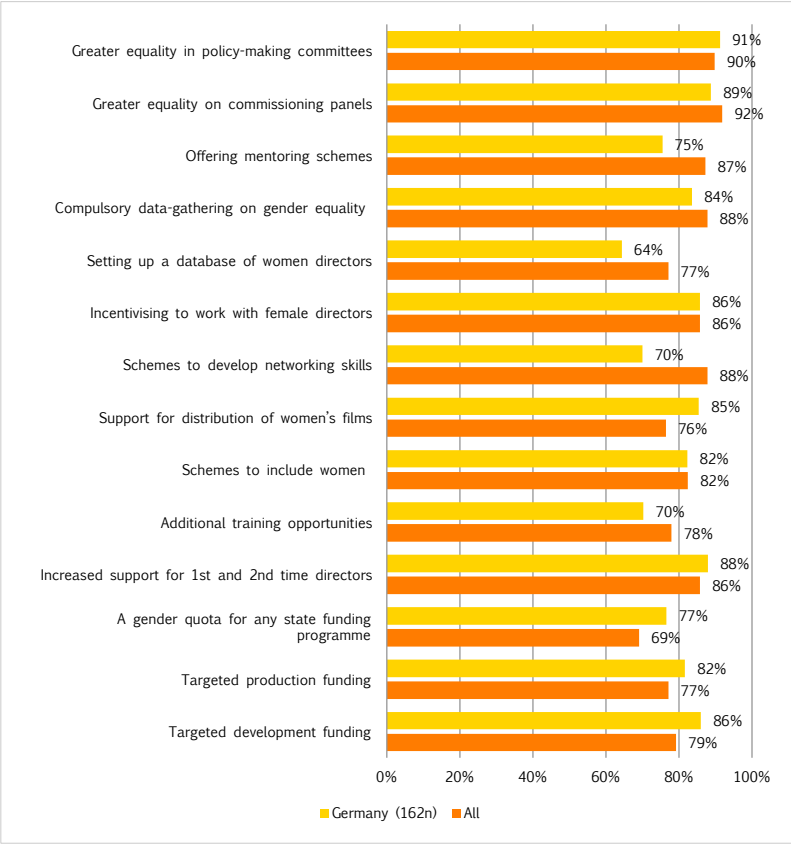
5. Further training and mentoring programs are considered least important (but still 70-75%).

Figure 31: What are considered important measures to encourage women to become or remain active directors in the field? (German and European average)



Source: EWA report database – Questionnaire

Note: on the basis of 162 German respondents and 898 overall respondents

APPENDIX V

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ITALY

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Introduction

This report was carried out by the research unit of Directorate-General Cinema of the Italian Ministry of Cultural Heritage and Activities and Tourism (DG Cinema – MiBACT). This is the first DG Cinema survey on gender issues. DG Cinema joined EWA Network to evaluate the status of women in the Italian film industry and investigate the reasons behind the alarming gender imbalance. The aim of the study is to identify the best practices and policies that guarantee diversity of voices and stories in national films and that promote an unbiased portrayal of female image on the media.

The trends in the key indicators examined show that the main bottlenecks for women lie in two stages of the journey to film directing. The first one is at the stage of education, when most female filmmakers that apply to film schools are keener to choose courses other than directing. The second bottleneck comes after training, when the already lesser share of "graduated female directors" – either from film schools or from other forms of training – have a harder time to get their films into production.

Overall, the causes of scarcity of women in directing positions seem to be dual. One coming from women themselves and from a distorted self-perception which discourages them to engage in highly competitive and leading careers. The other reason lies on the other side of the industry and is connected to a limited trust from investors, either public or private, to bet on a woman-led project. Indeed, based on data collected, public financing choices seem to echo, percentage-wise, the low share of applications to the fund. The number of female-directed films at the fund-raising stage is in fact always small but, it is worth noting that it is the producer, not the director, that decides to apply. Therefore, the first choice is in the hands of the producer who picks the project and submits the request for support. It is particularly difficult for women to find a professional outlet in the industry with a producer backing them. From education to professional activities, the entry points narrow down for women leaving them marginalized in the film business, with very few female-directed works available on screen for the audience although festival circulation looks proportionally more rewarding.

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I. Summary of findings

1.1 Education, entry and film schools

The route to directing for men and women starts mainly through directing short films and documentaries. Film schools are another important starting point but it seems to be slightly more substantial for men than for women.

In the National Film School (Scuola Nazionale di Cinema), the share of female applicants to all courses is on average 39%, showing then a rather balanced composition. The share of female applicants is confirmed by the share of female graduates, that is 41,5% of all graduates.

The scenario changes dramatically when focusing on film directing courses: female applicants to film directing are only 17% of all applicants, meaning that women are discouraged from engaging in directing already at a very young age.

Based on the answer to the EWA questionnaire snowballed to film professionals, men make their mind about their directing career at an earlier age and actually start it sooner than women do. On average, men shoot their first film at a younger age (20 years old) than women (25 years old).

Both men and women learned the skills to become directors mainly by doing, and, as a second choice, from film schools (men) or training courses (women).

1.2 Presence in the industry

The next stage in the route to directing is the enrolment in the film authors' register. At this stage, the female share has already decreased compared to the share of film school graduates. Registered female screenwriters and directors are only 25%.

Among the factors discouraging women from directing, the questionnaire proposed multiple choices: lack of self-confidence, scarcity of role models, competitive struggle to secure funding, challenges of leadership, family commitments, lack of networks and job instability. All of them seemed important to the respondents, slightly more from the women's perspective than from the men's perspective. Anyhow, for both men and women, the latter are discouraged from directing mainly because of job instability issues.

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Gender, however, doesn't seem to be the major difficulty in juggling between family and work but being a director and having children is discouraging regardless of one's gender, and actually, male respondents seem to even have an harder time.

1.3 Funding

The first step to access the industry is fund raising. The analysis on national film funds shows an even smaller share of female's films applying and, consequently, obtaining state support.

The number of female-directed films funded is overall 11%. The success rate of these funds is 34,7% for female directors' films and 41,2% for male directors' ones.

Budget-wise, the spend in the 2006 – 2013 period is shared per gender as follows:

- 15,6% of OPS (first and second works) support was awarded to female-directed films, 84,4% to male directed films;
- while 8,9% of IC (works by directors from their third feature onwards) support was awarded to female-directed films, 91,1% to male-directed films.

The female quota in the category of newcomer directors (OPS) is higher than the established directors' one (IC).

Men and women who filled in the questionnaire have different views on the weight of the director's gender on financiers: the majority of men think that gender has no impact on public funders and, although in a lower percentage, it has no impact on private investors either. Women's views are different: more than half of respondents feel that gender has a significant weight in financers' decisions.

1.4 Broadcasters' financing

Broadcasters are another substantial source of film financing. As regards the number of films financed by the Italian PSB, Rai, in the 2006-2013 period, 21% are directed by women, while men directed 79% of all Rai's films.

The share of investment in films directed by women is quite lower than the share related to the number of financed films: only 11,4% of the budget is spent for women's films while men received 88,6% of the investment.

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1.5 Releases

The extremely low number of female-directed films financed at the fund raising stage results in a sparse presence also in the end market. In fact, the gender share of new national releases even shows a decreasing ratio for women: only 9.2% of films screened in theatres are directed by a woman, while 90.8% are directed by men.

1.6 Admissions

The analysis of box office results follows and strengthens the trend observed in previous figures. The market share of films directed by women is 2.7%, while male directed films' quota is 97.3%. When accessing the market, the gender gap widens up and this might be due also to distribution strategies (number of screens, P&A investment) though these activities are not in the scope of this survey.

Women answering the questionnaire consider P&A as the most important factor affecting the box office performance of women's films. Consistently, the distribution strategy is the next important aspect, but also subject, genre and production value are considered substantial elements of films' success, while critical review is deemed important but less than the previously mentioned factors.

1.7 Festival circulation

An interesting measure of the impact of films on audiences and an approval indicator, apart from theatrical release, is the circulation of films in festivals and award ceremonies. Findings show that female directed films, proportionally, are more successful than male directed films in all categories. 33% of female-directed films received at least one national or international award or nomination, while 17% of male-directed films got national awards/nominations and 23% received international awards/nominations.

As for festivals, 73% of films directed by women participated in at least one international festival and 47% to a national one. For men the share is slightly lower, with 58% of films attending international festivals and 43% invited to national events.

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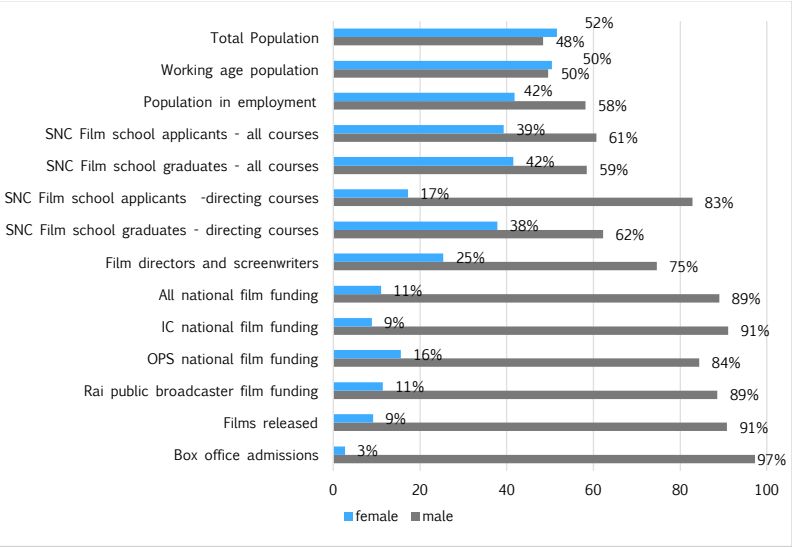
1.8 Questionnaire highlights

Respondents to the questionnaire expressed the belief that gender inequality exists among directors in Italian national industry, although this is mostly felt by women, while male respondents, though agreeing, are less convinced.

Among the factors that could encourage women into the industry, women picked increased support for transition from training to employment as a crucial one. This choice is in line with the bottleneck that clearly exists at the end of the education process where most women fall back on alternative careers to directing.

The questionnaire answers show that, on average, men and women agree that female-directed films may have an impact on society in equal rights, in diversity of cultural expression on screen. In addition, violence against women might be affected by more female-directed films, as well as representation of women on screen and, generally, tolerance in civil society. They also both believe the director's gender affects the way the film subject is treated.

Figure 1: Italian film industry: gender share across key indicators (%)



Source: EWA report database – Survey
Base: Istat, Centro Sperimentale di Cinematografia, SIAE, DG Cinema – Mibact, Rai Radiotelevisione italiana, Cinetel

II. Recommendations for action

National researchers' recommendations for action

- Organisation of initiative to raise awareness and promote the debate on the issue of women's marginalisation and image misrepresentation in the media
- Establishment of inter-institutional dialogue with competent authorities and with stakeholders and professionals
- Introduction of programmes to promote female role models to young students
- Regular data monitoring for national film fund and for operators under investment obligation in film production
- Production of survey on the status of women in the industry and analysis on the causes of imbalance
- Introduction in funding application forms of gender box for cast and crew
- Setting up of a database of women professionals
- Support of the transition from training to employment
- Aim at gender equality in the composition of commissioning committees
- Measures to support publicity, advertising and distribution strategies for female-directed films

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III. Methodology

The survey is based on quantitative and qualitative data.

Quantitative data sources are DG Cinema - MiBACT database and other institutions' and trade associations' databases that kindly supplied ad hoc figures (SIAE, 100autori, Centro Sperimentale di Cinematografia, Cinetel, Luce Cinecittà – Filmitalia, Rai). The timeframe for most data is 2006-2013, although in some cases data weren't available for all years. Figures on films refer to feature live action, documentaries and animation over 75'. Films are of Italian nationality when they are 100% Italian or acknowledged as co-productions, regardless of the Italian share.

Qualitative data are the end result of the questionnaire launched over a 4-week period, published on DG Cinema – MiBACT web page and forwarded to trade associations, national and local film funds and film commissions, film schools, broadcasters, Italian Media Desks and targeted film festivals.

The total number of Italian respondents was 119 with a large majority of women, 77,3% compared to 22,7% men. The age spectrum of the respondents was fairly wide, ranging from 20 to 77 with a mean for women of 43 and a mean for men of 46. All professional categories indicated were represented (although unevenly), with the exception of sound engineer.

The categories most represented, for both men and women, were directors, scriptwriters; producers; film experts. Male directors numbered only 12 while there were 59 female directors.

In some cases, questions had multiple options to select, while in case of a 1-4 scale answer, results were based on "applies fully" and "applies" answers.

IV. Women's Presence in the industry

4.1 Does gender inequality exist?

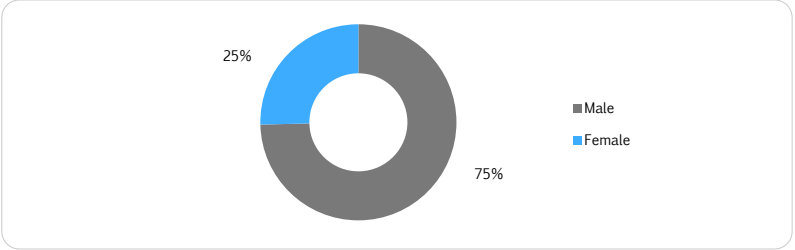
Respondents to the questionnaire expressed the belief that gender inequality exists among directors in Italian national industry although this is mostly felt by women, while male respondents, though agreeing, expressed it less strongly.

4.2 Number of working directors

The figures on feature films and documentaries released over the 8-year period give a very clear outlook on women presence in the industry. Only 9% of films screened in theatres are directed by a woman. Even though splitting the works into live action and documentaries shows higher shares for documentaries (12% female directed/ 88% male directed), the gap is still very wide and the overall numbers too small to be significant.

According to the Italian copyright collecting society, SIAE, within registered film authors in 2014, the proportion of women is larger compared to the film releases figures. Up to 25% of registered authors are female. This is partially due to the wider scope of the SIAE Register that includes film directors, screenwriters, and dubbing dialoguist.

Figure 2: Film Directors and Scriptwriters, 2014



Source: EWA report database - Survey
Base: SIAE

4.3 Numbers of directors in receipt of national funding

The ratio of female and male directors supported by the national film fund in the 2006-2013 timeframe echoes the lack of films with female directors. Over 8 years only 12% of films supported by Directorate-Cinema of the Italian Ministry of Culture had a woman as director, but this outcome reflects the small share of female directed works applications for national funding. When observing the Italian film market, the marginalisation of women is constantly and consistently affirmed. But does the position for active directors mirror the demand of women's ambitions?

V. Entry into the industry

5.1 How did you get your skills*?*

Based on the answer they gave to the questionnaire, men make up their mind about their directing career at an earlier age and actually start it sooner than women. A higher percentage among men (33%) decided to become a director at a very young age – before 11 – while only 17% of women (10 persons) took the decision that early in their life. On average, the first film was shot sooner by men (20 years old) than by women (25 years old).

Both men and women learned the skills to become directors mainly by doing, and, as a second choice, from film schools (men) or training courses (women).

5.2 What was your route into directing?

The route to directing for men and women starts mainly through directing short films and documentaries. Film schools are another important starting point but it seems to be slightly more substantial for men than for women. As confirmed by data shown further on in the Film School section, the amount of women that apply for the strictly selective directing course is very low. Apparently, then, women rely less than men on film schools to learn and start their filmmaking career. Additionally, women rely more on the acting career as a route into directing, while for men also national film programmes for first time directors are a valuable option.

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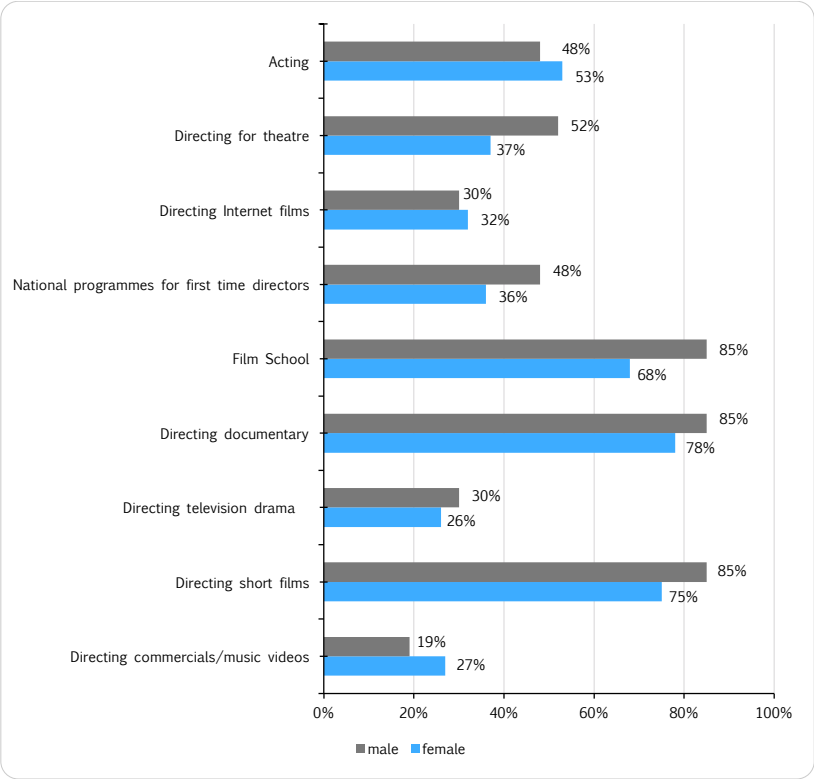
Figure 3: Routes into directing



Source: EWA report database - Survey

5.3 Women directors' presence in film school

Film schools are an important entry point for young directors due not only to the tools and education provided but also to the school's connections to the industry, that guides the graduated students into their professional career.

Data for this survey were supplied by Centro Sperimentale di Cinematografia - Scuola Nazionale di Cinema (SNC - National Film School), the oldest Italian Film School, that has five locations with different areas of expertise: Rome (cinema); Palermo (documentary films); Milan (TV drama and production/industrial Cinema);

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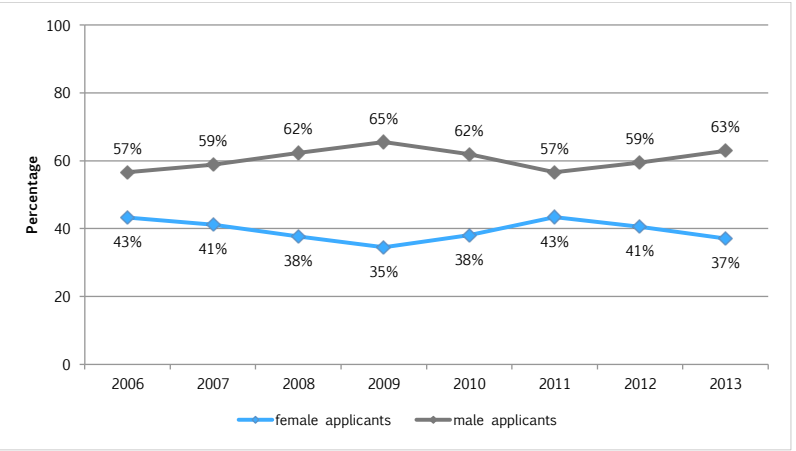
Turin (animation); and L'Aquila (reportage). Admission to the school is strictly selective. The interdisciplinary teaching programme prepares students with three-year programmes in the specific areas of directing, scriptwriting, acting, photography, editing, sound techniques, production, set-design, costume design.

During the 8-year timeframe examined, the share of female applicants to all courses of the various centres is on average 40% showing then a rather balanced composition, although fluctuating in the trend over the years. Applicants have to pass a very selective exam to be admitted to the school and only few of them actually enter the course. Therefore, dropouts are very rare.

The share of female applicants confirms the share of female graduates that is 41,5%.

Figure 4: Applicants for film courses at all SNCs (2006-2013)



Source: EWA report database - Survey
Base: Centro Sperimentale di Cinematografia – Scuola Nazionale di Cinema

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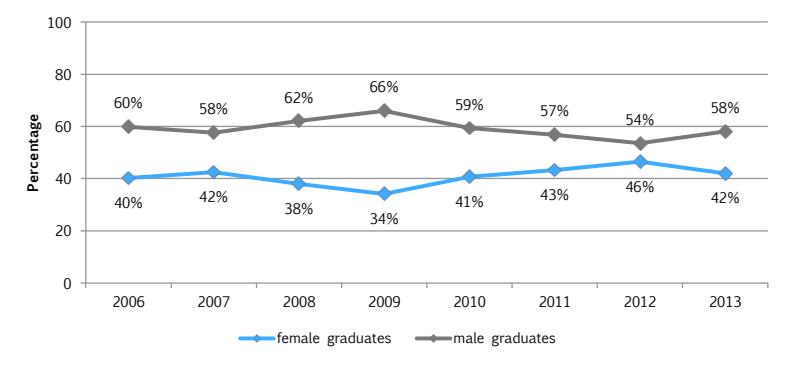
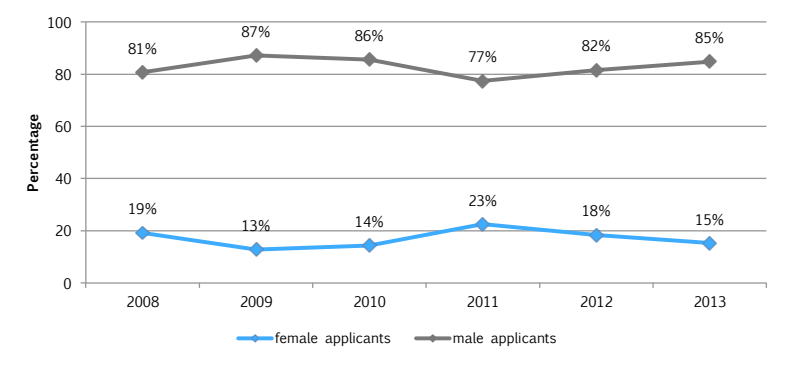
Figure 5: Graduates from film courses at all SNCs (2006-2013)



Source: EWA report database – Survey
Base: Centro Sperimentale di Cinematografia – Scuola Nazionale di Cinema

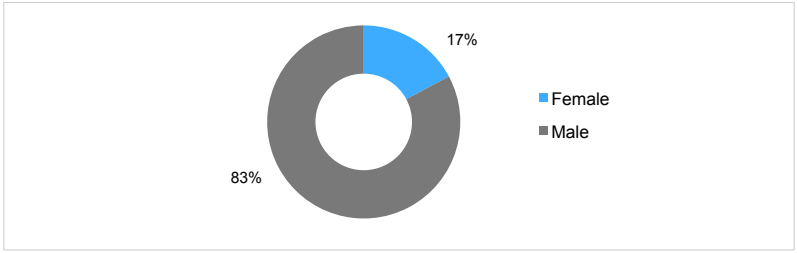
The scenario changes dramatically when focusing on film directing courses. National Film School provided this detail for the Rome Film School, the most ancient and prestigious one, specialized in feature films. Figures collected over a 2008-2013 period, show how few female applicants to film directing are - only 17% of all applicants - meaning that women are discouraged from engaging in directing still at a very young age.

Figure 6: Applicants for film directing course at SNC Roma



Source: EWA report database - Survey
Base: Centro Sperimentale di Cinematografia – Scuola Nazionale di Cinema

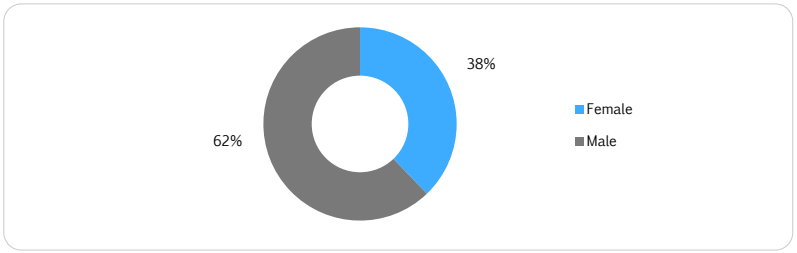
Figure 7: Percentage of applicants for film directing course at SNC Roma (2008-2013)



Source: EWA report database – Survey
Base: Centro Sperimentale di Cinematografia – Scuola Nazionale di Cinema

Compared to the small number of girls applying to directing courses, the results in terms of admission to the course and final graduation are more promising, with 37,8% of graduates in film directing being women. This also shows a good success rate for women and a special attention from the examiners to have balanced classes as far as possible.

Figure 8: Percentage of graduates from film directing course at SNC Roma, 2006-2013



Source: EWA report database – Survey
Base: on Centro Sperimentale di Cinematografia – Scuola Nazionale di Cinema

VI. National funding

6.1 National production fund – overall % share

For the purpose of this survey, only selective national schemes for long-length (over 75') films are taken into account. Automatic schemes, such as tax credit, have not been considered. Selective national film funding is split into two schemes: Cultural relevance films (*Interesse Culturale* or "IC"), covering works by directors from their third feature onwards; and first and second time directors' films (*Opere Prime e Seconde* or "OPS").

The total amount of these funds is decreasing in recent years: from €46.2 million for 2006 to €20.7 million for 2013. In all national film funding schemes, including both IC and OPS, the female directors' share is 11%, the male share is 89%.

Figures in this paragraph are based on the number of applications and funded films.

Looking both at the applications and at the funded films, in the 2006-2013 period, there were no substantial variations year by year in the percentage of male and female directors, so the average data are adequate to understand the situation.

As for OPS application, the average share of female directed works is 16%, while 84% is the share of male directed works. Looking at the number of applications for IC, that is dedicated to established directors' works, the female share decreases: 12% of applications are for works directed by women, 88% for works directed by men.

If we look at the funded films, the situation is quite similar, with a decrease in the presence of women. Female directors' share for funded OPS is 14,8% while for IC, the female share decrease to 10% of funded works.

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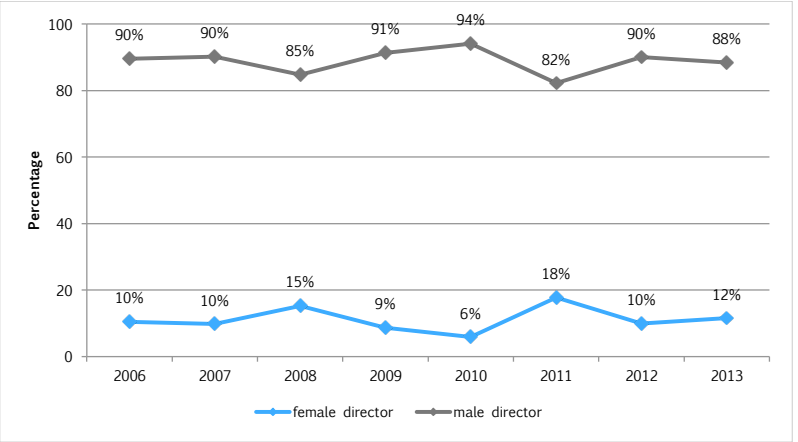
Figure 9: All national film funding



Source: EWA report database – Survey
Base: DG Cinema - MiBACT

Comparing the number of applications and the number of funded films makes it possible to observe the success rate of national film funding: for OPS, the average success rate of female directors' films is 29,4%; it grows for IC films, reaching 47,1%. For male directors' films, the average success rate of OPS is 31,3%, while for IC is 59,5%. This means that the number of applicants for OPS, i.e. newcomer directors, is higher than IC applicants, both for men and women. The success rate in both kinds of aid is slightly higher for male directors than for female directors' works.

The overall success rate, including both OPS and IC funds, is 34,7% for female directors' films and 41,2% for male directors' ones.

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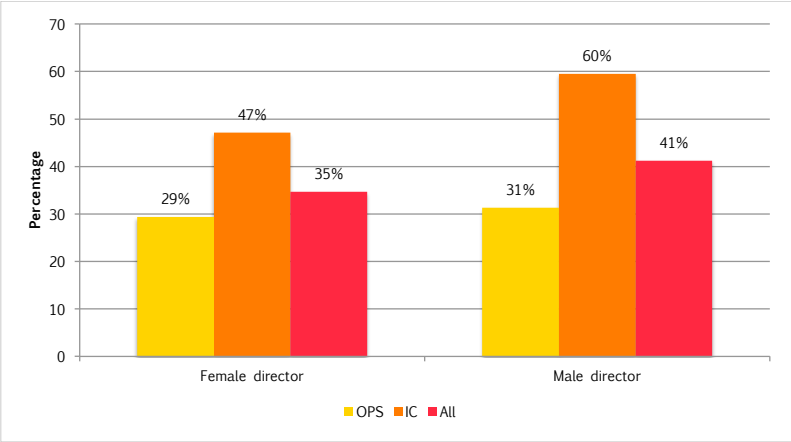
Figure 10: Success rate of IC and OPS funding applications, 2006-2013



Source: EWA report database – Survey
Base: DG Cinema - MiBACT

6.2 National production fund – fiction and documentary

In this paragraph the national public support is examined budget-wise.

The Italian national fund doesn't distinguish between live action and documentary: there is not any specific fund for documentaries. Documentaries running over 75' have access to the general fund for long-length films. Often documentaries apply for another national scheme dedicated to short films (under 75'), but the analysis of this scheme is not included in this report.

The analysis of national support to both OPS and IC long-length works shows how live action works absorb most of the total envelope, while documentaries receive a minority quota of the national fund. Nevertheless, it is worth noting that the number of applications for documentaries is much smaller than the number for live action works. Anyway, the general trend of the past years highlights that the amount of funding awarded to documentaries is increasing, despite the general reduction of the total fund budget.

The general average data, combining funded IC and OPS, shows that 11,0% of direct national film funding was awarded to films directed by women, 89,0% to films directed by men.

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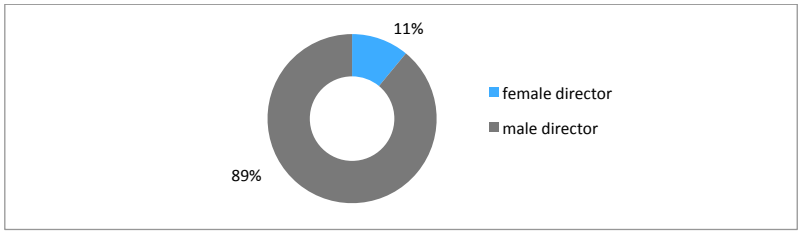
Figure 11: Share of all national film funding, 2006-2013



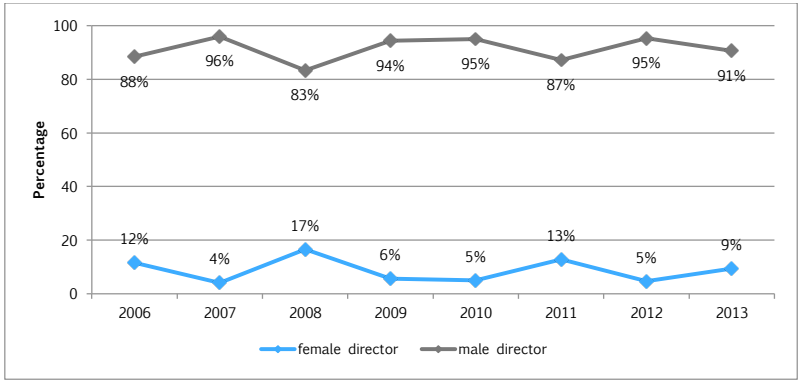
Source: EWA report database – Survey
Base: DG Cinema - MiBACT

The amount of spend in the 2006 – 2013 period can be broken down per gender and per schemes as follows:

- 15,6% of OPS support was awarded to female directed films, 84,4% to male directed films;
- 8,9% of IC support was awarded to female directed films, 91,1% to male directed films.

In this case as well, the proportion of women in the category of newcomer directors (OPS) is higher than in the established directors' one (IC).

Figure 12: IC national film funding



Source: EWA report database – Survey
Base: DG Cinema - MiBACT

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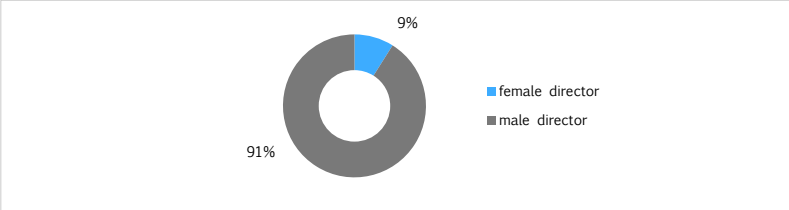
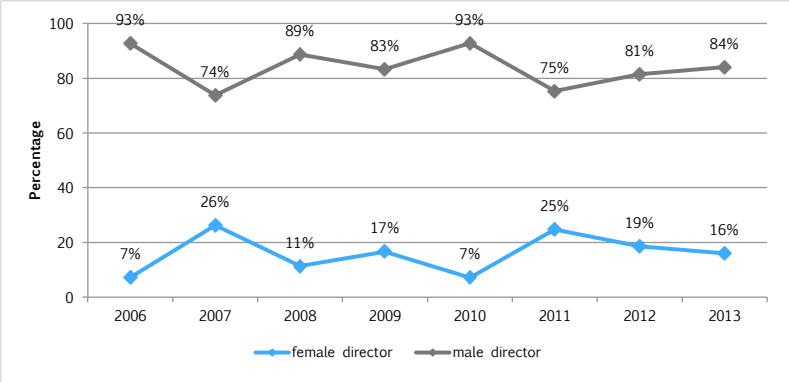
Figure 13 : Share of IC national film funding (2006-2013)



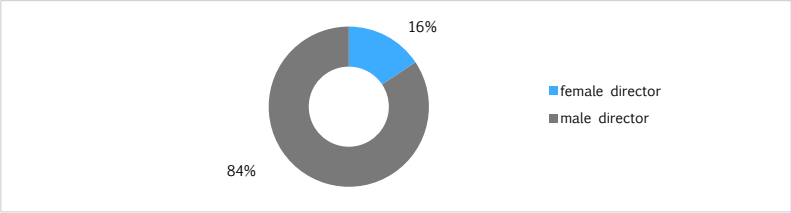
Source: EWA report database – Survey
Base: DG Cinema - MiBACT

Figure 14: Share of OPS national film funding



Source: EWA report database - Survey
Base: DG Cinema - MiBACT

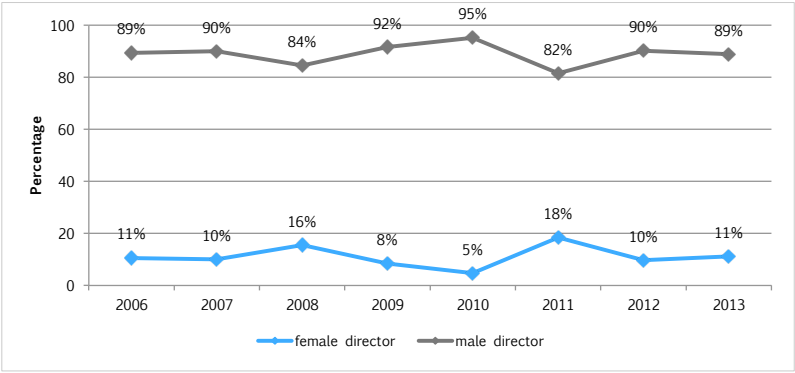
Figure 15: Overall share of OPS national film funding (2006-2013)



Source: EWA report database - Survey
Base: DG Cinema - MiBACT

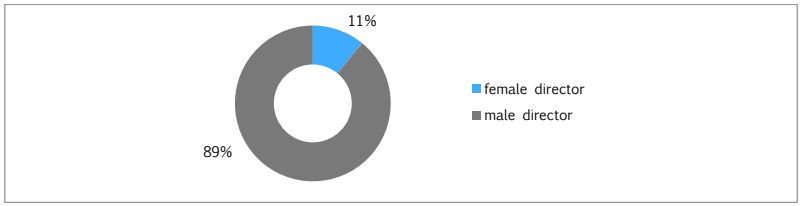
Focusing on **fiction works**, the share of funding to female works is quite low: the average quota in the 2006-2013 period is 10,9%. Men's works obtained 89,1% of the total funding budget.

Figure 16: National funding for fiction films



Source: EWA report database – Survey
Base: DG Cinema - MiBACT

Figure 17: Share of national funding for fiction films (2006-2013)



Source: EWA report database - Survey
Base: DG Cinema - MiBACT

Supported documentaries are very few, regardless of the director's gender and exact figures are not available. However for the purposes of the following chart the % share has been estimated: between 2006-13, 3 out of 78 productions are documentaries directed by women, and 22 out of 526 productions are documentaries directed by men. Consequently in the period 2006-2013, the share of support to women's works has been 12,4%, while the share to men's works has been 87,6%.

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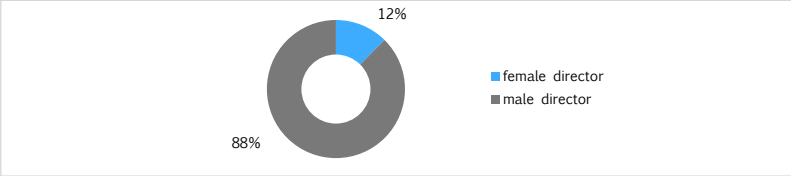
Figure 18: Share of national funding for documentary films (2006-2013)



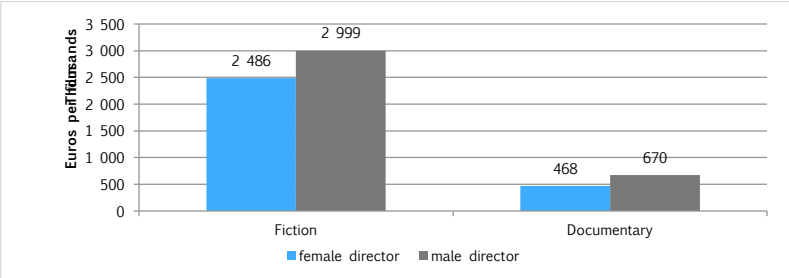
Source: EWA report database – Survey
Base: DG Cinema – MiBACT
Note: estimated numbers for period: women – 3 documentaries, men – 22 documentaries

6.3 Size of production budgets for female and male directed films

Gender breakdown for production budgets of supported films is only available for a three-year period: 2011, 2012, 2013. For fiction works, the average budget ranges between €2.8M and €3.1M; for the few feature documentaries produced, the average budget is lower, ranging between €600.000 and €900.000.

The gap between male and female directors' film budgets is not substantial: in 2012, the average budget for female directors' works is even higher than for male directors, while in 2011 and 2013 the male directors' works have a higher budget. Anyways, the very low number of women's films, compared to men's films, skews the statistics showing misleading averages, since, on such a small scale, one single title is enough to alter the frame.

Figure 19: Average budget of supported film productions by genre (2011-2013)



Source: EWA report database - Survey
Base: DG Cinema - MiBACT

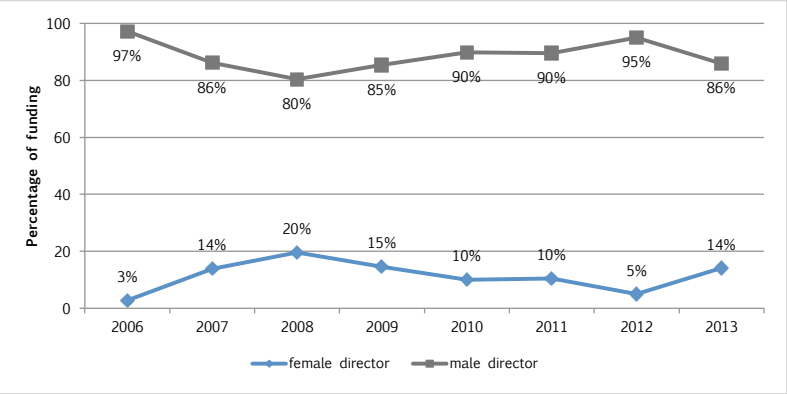
VII. Broadcast funding

Broadcasters' gender data are only available for Rai, the Italian public service broadcaster. Specifically, these data concern films produced by Rai Cinema, the branch specialized in film production and distribution.

Considering the number of films financed in 2006-2013, 21% are directed by women, 79% are directed by men. The total number of films backed by Rai Cinema in 2006-2013 is 643, including both fiction and documentaries. The number of films financed increases progressively year after year: from 32 in 2006 to 109 in 2013. However, the share of films directed by women doesn't vary and is around 20%.

As for the amount of financing, the share of investment in films directed by women is rather lower than the share related to the number of financed films: 11,4% of the investment for women's films and 88,6% for men's. This means that, as average data show, the budget of films directed by women is much lower than the male directors' ones.

Figure 20: Public broadcaster funding for all films

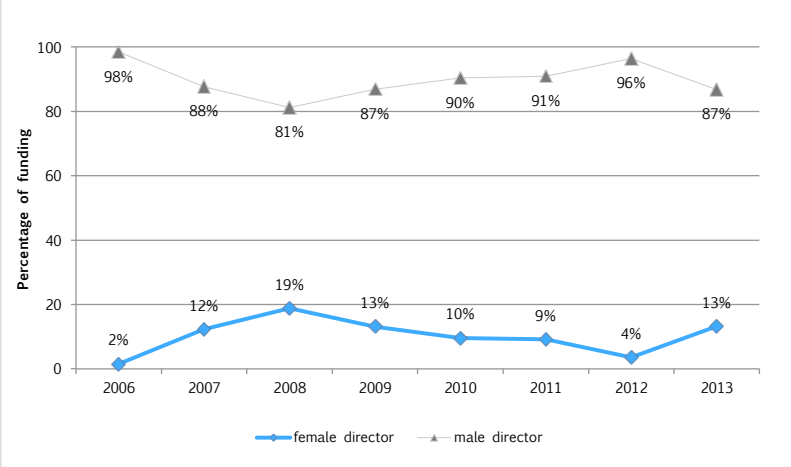


Source: EWA report database – Survey
Base: Rai Radiotelevisione Italiana

The main quota of investments in films by Rai Cinema is dedicated to fiction films, while documentaries absorb a residual part of the budget. This is why the female/male share in case of documentaries is less significant although more in

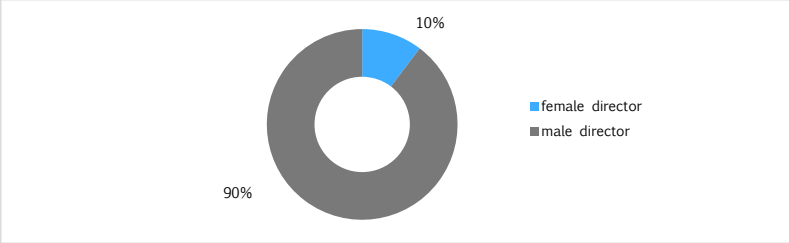
favour of women (35%). Focusing on fiction films, the average ratio of financing for female directors' films is 10,3% in the period.

Figure 21: Public broadcaster funding for fiction films



Source: EWA report database – Survey
Base: Rai Radiotelevisione Italiana

Figure 22: Share of public broadcaster funding for fiction films (2006-2013)



Source: EWA report database – Survey
Base: Rai Radiotelevisione Italiana

VIII. Reasons for the low numbers of directors

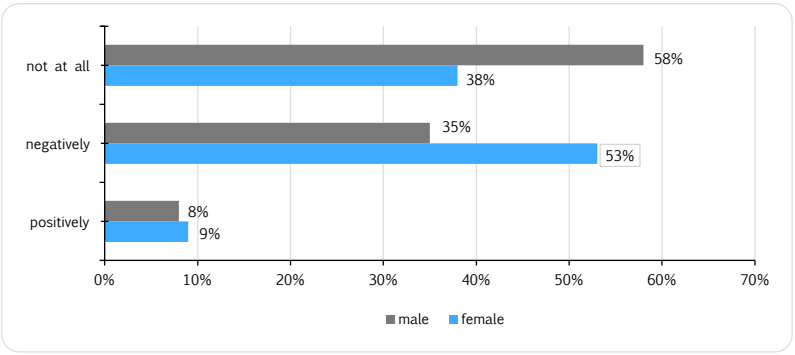
8.1 What factors discourage women?

As regards factors discouraging women from directing, the spectrum of responses to the questionnaire is narrow. So, overall, all factors mentioned – lack of self-confidence, scarcity of role models, competitive struggle to secure funding, challenges of leadership, family commitments, lack of networks and job instability - seem important, slightly more from the women's perspective than from the men's perspective. Anyhow, for both men and women, the latter are discouraged from directing mainly because of job instability issues.

8.2 Does gender affects funders' decisions?

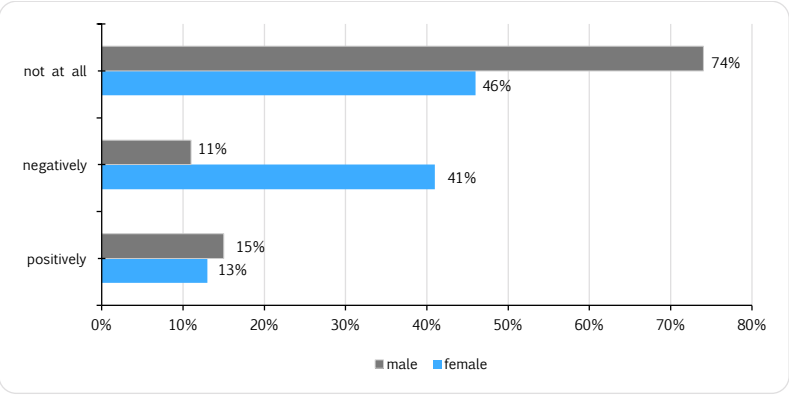
Men and women have different views on the weight of the director's gender on financiers. 78% of male respondents to the questionnaire believes gender has no impact on public funders and, although in a lower percentage (58%), it has no impact on private investors either. Women's views are split concerning public funders with 46% of female respondents agreeing that gender has no impact on public funders and 41% answering that it affects the decision negatively. Most women (53%), instead, believe private investors are less keen to invest on a female directed work.

Figure 23: Female director impact on private funders decision



Source: EWA report database – Questionnaire

Figure 24: Female director impact on public funders decision



Source: EWA report database – Questionnaire

8.3 What is the impact of being a parent?

Only 36% of directors responding to the questionnaire were also parents, with a slightly higher percentage among men (38%) compared to women (35%). Based on these results, gender doesn't seem to be the major difficulty in juggling between family and work but being a director and having children is discouraging regardless of the gender. When asked if being a parent has discouraged from filmmaking, men even answer with "applies" while women answer "applies less". This is likely due also to the inadequate family care policies in place for working parents particularly in case of film director's jobs.

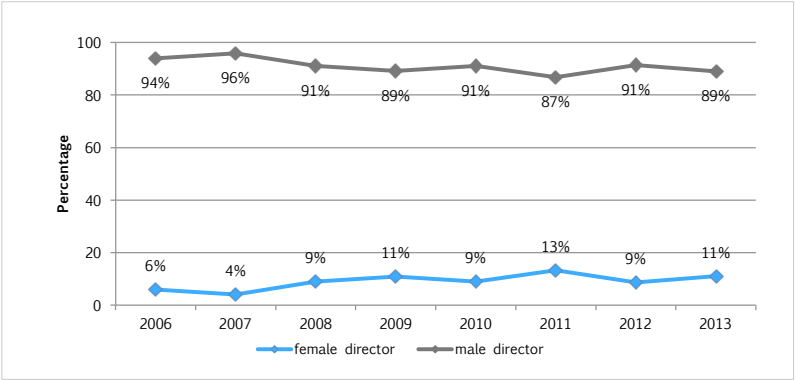
IX. Releases

9.1 Share of national releases – documentary & fiction

The available data about releases concern all national films theatrically released.

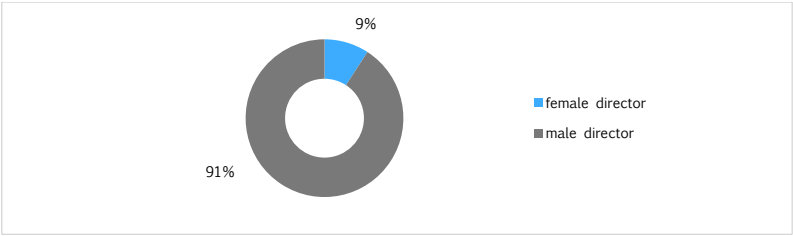
In the whole period 2006-2013, the gender share of new national releases shows a very low proportion for women: only 9.2% of releases are directed by women, whereas 90.8% are directed by men.

Figure 25: National film releases



Source: EWA report database – Survey
Base: Cinetel

Figure 26: Share of national film releases (2006-2013)



Source: EWA report database – Survey
Base: Cinetel

9.2 Share of national fiction and documentary releases

As stated in previous analysis on production, the number of documentary releases is very low, with an increasing trend: from 4 features in 2007 to 35 features in 2013. Again, due to the scarce amount of documentaries, data have to be interpreted carefully.

The number of fiction varies between 91 new titles released in 2006 to 133 new titles in 2013.

For fiction, the average data shows that 9% of new releases in the period are directed by women, 91% by men.

For documentaries, the average data shows that 12% of new releases in the period are directed by women, 88% by men.

9.3 Assumptions on women's share of film releases

While the majority of men and women who answered the questionnaire are aware that the percentage of national female-directed films released is under 20% (88% of women and 77% of men), the majority of men are more optimistic in terms of European films, since 54% of them think the percentage of female-directed works is between 20% and 30%. On this issue, most women are more cautious estimating that also European female-directed films are under 20%.

When asked what percentage of the total box office is taken by films made by women, the estimates vary within a range between 1% and 35%, the larger group, made of 13% of the respondents, think the quota is 5%, while the other estimates are spread among the respondents.

9.4 Awards and critical reception

An interesting measure of the impact of films on audiences and an approval indicator, apart from theatrical release, is the circulation of films in festivals and award ceremonies. A specific analysis has been carried out using films released in 2013 as sample dataset and checking their participation at both national and international festivals and awards. All festivals and awards nominations and prizes listed by Luce Cinecittà filmitalia.org database were equally taken into account with no discretionary ranking of importance of the event.

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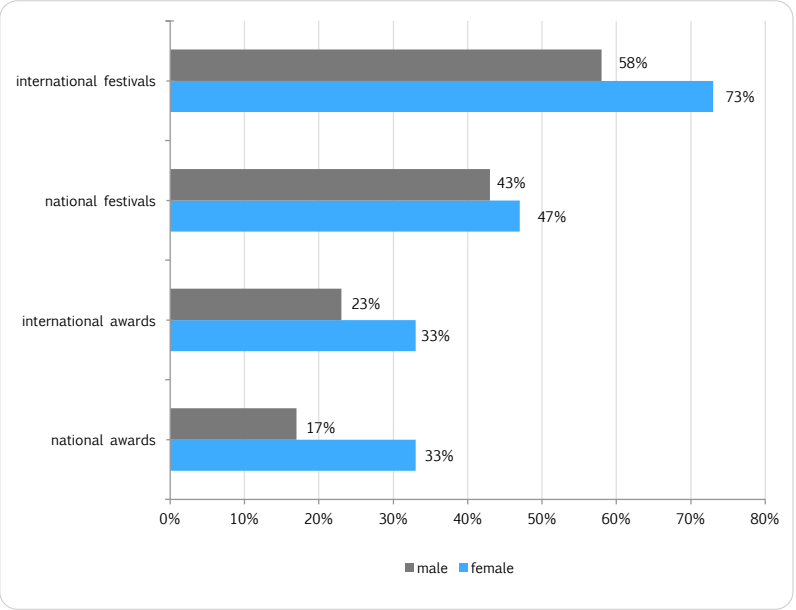
For 2013, 157 films were examined, 10% of which directed by women. Films were coded to measure how many of them participated in at least one festival/prize nomination and won at least one prize. Findings show that female directed films, proportionally, are more successful than male directed films in all categories. 33% of female's films received at least one national or international award or nomination, while 17% of male's films got national awards/nomination and 23% received international awards/nomination.

As for festivals, 73% of films directed by women participated in at least one international festival and 47% in a national one. For men the share is a bit lower, with 58% of films attending international festivals and 43% invited to national events.

Figure 27: National and international festivals and awards participation



Source: EWA report database – Questionnaire
Base: Filmitalia.org

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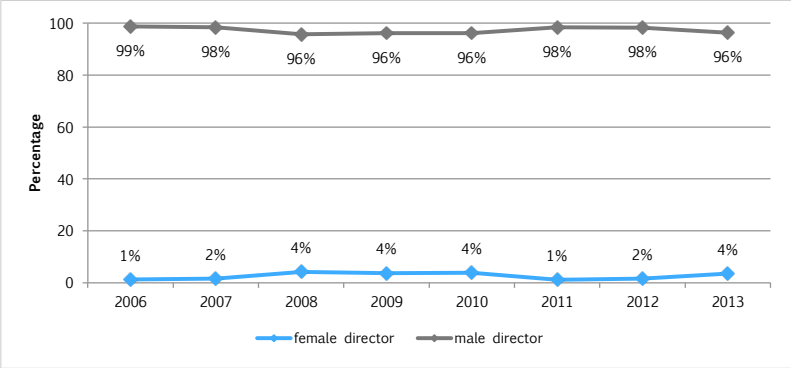
X. Admissions

10.1 Share of admissions for all national funded films

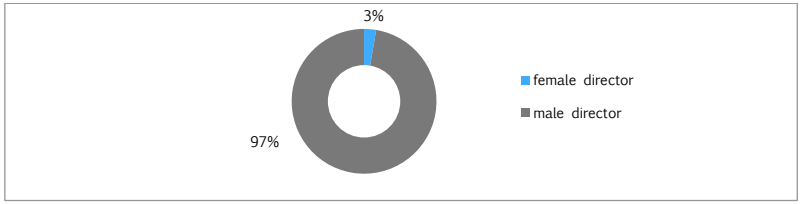
Box office results follow and strengthen the trend observed in the previous paragraphs. The market share of films directed by women in the period 2006-2013 is 2,7%, while male directed films' share is 97.3%. When accessing the market, the gender gap widens up and this might be also due to distribution strategies (number of screens, P&A investment, etc.) though these activities were not explored in this survey.

Figure 28: Box office admissions to all films



Source: EWA report database – Survey
Base: Cinetel

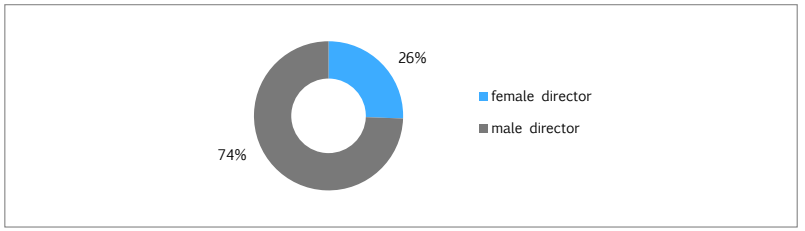
Figure 29: share of box office admissions (2006-2013)



Source: EWA report database – Survey
Base: Cinetel

In the table below, given the small scale of documentary production, average figures can be misleading. In spite of women's apparent share of 26%, the very low number of films and audience numbers should be noted.

Figure 30: Share of box office admissions to documentary films (2006-2013)



Source: EWA report database – Survey
Base: Cinetel

10.2 What affects box-office performance?

Women answering the questionnaire consider P&A aspects the most important factor affecting box office performance of women's films. Consistently, the distribution strategy is the next important aspect but also subject, genre and production value are considered as substantial elements of films' success, while critical review is deemed as important but less so than the previously mentioned factors. On the other hand, for men the film subject is the most crucial element that affects women's films box office performance although P&A and genre are also considered important.

10.3 Did the gender of the director affect the choice of a film?

Although both men and women answering the questionnaire feel the gender of the director affects the way the film subject is treated, they are not convinced that people consider the director's gender when choosing a film to watch.

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10.4 The social impact of more films directed by women?

The questionnaire answers show that, on average, men and women agree that female-directed films may have an impact on society in relation to equal rights, and diversity of cultural expression on screen. Also violence against women might be affected by more films by female directors, as well as representation on women on screen and, generally, tolerance in civil society.

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XI. Changing the Picture – Policies for Change

11.1 Existing measures for gender equality in the industry

In the audiovisual sector no measures are in place in public funding, so far, to promote gender equality although equality is taken into account in the composition of public fund selection committees and of the public agencies' board of management. Recently the competent authority, *DG Cinema - MiBACT* has undertaken several research projects, such as the present one, has carried out various publications on the matter and organised public conferences to promote the debate and raise awareness in the sector.

RAI, the Italian public service broadcaster, is the first PSM in Europe that has formally transposed (13th October 2013) the Recommendations of the Council of Europe to the media with regard to the prevention and combating of violence against women, to the correct representations of women's image and to gender balance. RAI has therefore adopted a "code of practice" aimed at promoting gender policy within the company. The purpose of RAI gender policy is to supervise respect for gender equality, guaranteeing a proper representation of human dignity, referring in particular to women's non-stereotypical image.

RAI also monitors women's portrayal on its show schedule by commissioning to the Observatory of Pavia a content analysis and to Eurisko a qualitative analysis to verify the correct representation of women in its programmes. The results of the study show that women representation on RAI channels is respectful in 95% of cases. Generally, women don't have a key role in tv programmes, though. This happens in many contexts: the cast of tv programmes (41% women, 59% men), the cast of tv series (42% women, 58% men), the guests invited or interviewed during information programmes (32% women, 68% men). The only area in which women outnumber men is in the role of active members of the audience attending tv programmes. Women, in fact, are asked to intervene with a role of "common, ordinary people, street people" while men intervene more as "political actors", as spokespersons for political parties, institutions, associations and civil society organizations, experts and opinion leaders are men in the majority of cases.

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11.2 Preparing the ground in school education.

All respondents to the questionnaire deem of high importance measures in school, starting from funding for children's drama productions although, overall, all kinds of support for media literacy in primary and secondary school level, from training in film skills to film clubs, are considered crucial for children's education. In this framework, designing projects for film education in school which introduce female role models in the film industry and show films directed by women might be an effective tool to promote gender equality and to encourage young girls to undertake film careers.

11.3 Measures to encourage women directors into the industry

The questionnaire offered a variety of factors that could encourage women into the industry. Among those, women picked increased support for the transition from training to employment as a crucial one. This choice is in line with the bottleneck that clearly exists at the end of education process where most women fall back on alternative careers than directing. Affirming the role of women directors for young people during school education and establishing targeted support schemes for film development are also considered important and both factors confirm the need to give women tools to choose and pursue a film directing career. Funding programmes and exhibiting more female directed films are also regarded important, while male respondents, although considering all these factors significant, find affirming female role models in school more convincing than other choices.

11.4 Policies to sustain women's careers in the film industry

In the questionnaire, men and women were asked to rank the policy measures that would be more effective to back gender equality. Women respondents deem that support for distribution of women's films and greater equality of representation on commissioning panels are the most relevant tools. Increased support for first and second time directors and additional training opportunities are also considered important.

In men's opinion, additional training opportunities are important as well, though not as much as for women. The next best tool among men's respondents is increasing schemes to develop networking skills. Male respondents consider it less important to

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have a gender quota for any state funding programme, which, by the way, is not the preferred option in women's choices either.

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APPENDIX VI

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SWEDEN

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I. Introduction and summary

This Sweden report is one of seven national reports contributing to the research project, *Where are the Women Directors in European Cinema?*

The report findings are based on two sources:

1) a quantitative survey completed providing available data on the presence of women directors and their films in the Swedish industry

2) a questionnaire, snowballed to almost 900 respondents of which the Swedish respondents comprised 122.

Findings from both sources are presented alongside in this report to complement the emerging picture.

1.1 Summary of findings

- The number of women qualifying at film school is around 50%. But their presence in the industry drops thereafter.
- Major bottlenecks are national film funding, public and private broadcasters and the cinema market.
- The number of female-led films being funded by the Film Institute has increased clearly already, and female directors were behind 50% of all feature films funded by a commissioner in 2014. But still actions are needed concerning the other players /factors mentioned above.
- Like in the other countries, female-directed films have received awards and participated in international film festivals to a higher extent than male-led films. Hence, films directed by women cannot be said to lack quality. Rather, the poor box office results for female-directed films can be explained by factors such as genre, production budget size, marketing budget size, distribution strategies and cinema programming.
- The results on the cinema market affect private investors like distributors and venture capitalists as well as the audience-related support scheme administrated by the Swedish Film Institute. Hence, to achieve a higher gender balance in the Swedish film industry these instances should be targeted.

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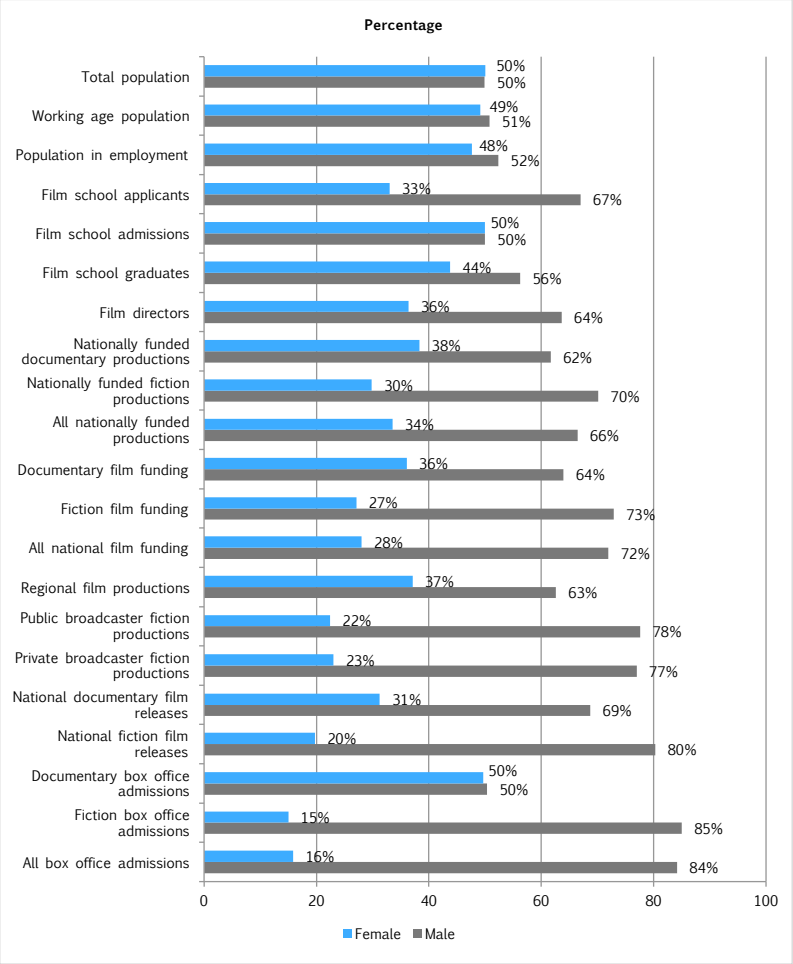
- There are more men applying to film schools and more men that direct films produced without support from the Film Institute. This suggests that the interest in and self-confidence regarding film production is generally lower among women.

Figure 1: Swedish film industry: Gender shares across key indicators



Source: EWA report database - Survey

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1.2 Recommendations for Action

- Put pressure on national film schools to involve the film industry in the education to a higher extent.
- Requirements for all broadcasters, public and private, to keep data on gender equality in commissions and acquisitions.
- Measures to encourage higher budget, genre movies with female directors.
- Review of distribution strategies for films directed by women and targeted support for publicity and advertisings.
- Lobby to make distributors and venture capitalists work for gender equality in film investments.
- Lobby to make cinema owners/programmers work for gender equality in film exhibition.
- Evaluate the current audience-based support scheme with a gender perspective and an international focus in mind.
- Measures to increase the interest/self-confidence in and technical knowledge of film/video making amongst girls, for example by supporting film clubs in schools.

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II. Methodology

2.1 Quantitative survey

The research covers the period 2006 – 2013.

The data covers documentary and fiction film of 60' and over, in both the film and public broadcasting sectors, although information on gender equality in the broadcasting sector has been difficult to access and is incomplete.

Country of origin is defined by the Swedish Film Institute in accordance with international standards. A film is Swedish if the production company is based in Sweden and if Swedish investments represent the majority of the budget. In the figures from broadcasters there are a few Swedish minority co-productions included.

Questions regarding funding are based on the year of funding decision. Questions regarding releases, cinema admissions etc are based on the year of cinema release.

2.2 Qualitative Questionnaire

The questionnaire was distributed through professional organisations of the industry including The Swedish Union for Performing Arts and Film, The Swedish Film & TV Producers, Writers Guild of Sweden, Swedish Society of Cinematographers, Film Sound Sweden, Stockholm Academy of Dramatic Arts (SADA) and Valand Academy. The respondents could choose several occupations to describe themselves. 52% described themselves as directors, 48% as screen writers and 42% as producers. The rest are spread over all sectors of the industry including film funders, editors and cinematographers. 65 % of respondents were women and 35 % men. The average age was 43 for women and 45 for men.

Several questions invited respondents to select more than one option so results do not always add up to 100. Where respondents select on a 1-4 scale, where 1 equals does not apply and 4 equals applies fully, results are based on applies fully and applies (3 and 4). Exceptions are noted.

The large number of respondents indicates a strong interest in this issue in Sweden. A higher share of respondents is producer, cinematographer, designer and in costume/make up than in the other countries. Sweden also has the highest share of male respondents, which is in line with the above. In most questions women answer more affirmative than men. This indicates that the interest is bigger for women.

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When comparing the Swedish results with that of other countries, the higher share of male respondents here can explain some differences.

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III. Women's Presence in the industry

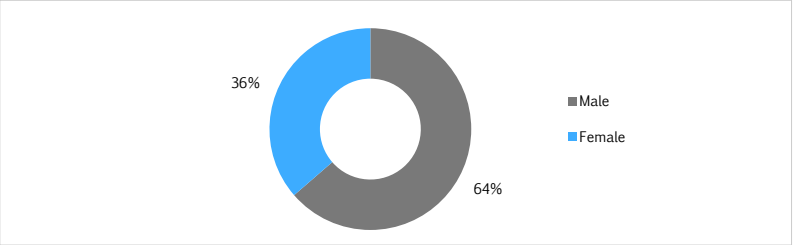
3.1 Does gender inequality exist?

In Sweden 73% of respondents felt that gender inequality exists. Women felt this more than men. Looking only at women, 87% applied to this statement.

3.2 Number of working directors

This is a difficult number to assess. There is no registry of directors available. However, looking at film directors registered as members of the Swedish Union for Performing Arts and Film, 36% are women.

Figure 2: Film directors registered as members of the Swedish union for performing arts and film, 2013 (%)



Source: EWA report database – Survey
Base: The Swedish Union for Performing Arts and Film

3.3 Comparative Profiling of directors

Here we've looked at the top ten Swedish films from 2011-2013 by women and men.

In general the female directors are a bit younger. The oldest is born in 1955, in comparison with 1940 for the men. Of the female directors 40% are born in the 1970's or 1980's. For male directors that share is only 10%.

The number of films they had directed previously is also lower for the female directors. Of the women 50 % were first-timers. Of the men none were. Of the

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women no one had done more than five films before. Of the men 50% had done more than five films before. This reflects the age difference between the female and male directors. The women are "younger" both literally and in their careers.

Of the female directors 60% went to film (directing) school. Of the men the corresponding figure is only 30%. For both men and women however, the schools were not a direct entry point to feature films. Before doing feature films almost all of the directors did either short films or TV. Short film is more common among the women, and TV is more common among the men. Among the men acting is also a common entry point, with 20% having gone to acting school. Of the women only one had a background in TV. This could be an explanation of the gender imbalance in film directing. Increasing the number of women in TV drama and comedy could be a way forward. But it also seems to be more men doing the shift from acting to directing. Hence, promoting female role models in directing might be of equal importance.

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IV. Entry into the industry

4.1 How did you get your skills?

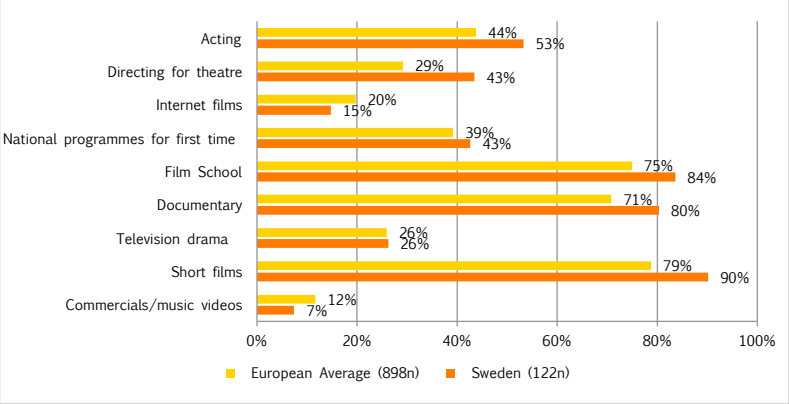
From the questionnaire 73% of directors are self-taught, 60% were trained at film school, 52% got skills from apprenticeship in the media industry and 37% had attended a training course.

In comparison with the total result for all countries a higher share state that they got skills from a training course, internship and learning-by-doing. Men state to a higher extent that they got skills from film school, internship and learning by doing. More women state they got skills from a training course. As mentioned above as many women as men graduate from the Swedish film schools today. But the answers reflect that there was a different situation before.

4.2 What was your route into directing?

The questionnaire asked people whether a range of pathways into directing were important, offering a yes/no option. Most respondents (90%) considered shorts as the most important way into the industry, with film school (84%) and directing documentaries (80%) next behind.

Figure 3: Routes into directing



Source: EWA report database - Questionnaire

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Directing commercials/music videos and Internet films are seen as less common entry routes than in other countries. Film school and directing for short films, documentary, acting and theatre are seen as more common routes.

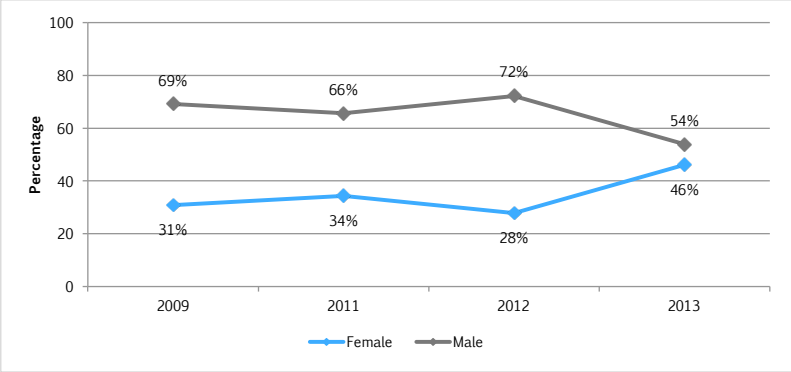
More men believe commercial/music videos, directing television drama, internet films and theatre are important routes into directing. As we have suggested above TV drama and commercials are more common entry points for men. This is also seen in some of the open ended answers. There are also remarks in the open ended answers that downplay the importance of film schools.

Even though film schools are seen as one of the most important entry points, this could be a reflection of how the respondents think it should be rather than the way it really is. There seems to be a problem regarding the relationship between film schools and the industry. In the open ended answers it is also mentioned that television and advertising is still an unequal business sector.

4.3 Presence in Film School

Figures were taken for applicants and students for directing courses at the national film schools Stockholm Academy of Dramatic Arts, Stockholm University of the Arts (SADA); and Valand Academy, University of Gothenburg between 2009 – 2013.

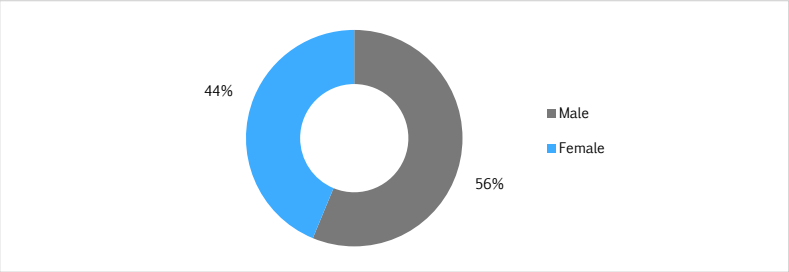
Figure 4: Applicants to film directing courses



Sources: EWA report database- Survey
Base: SADA and Valand Academy

Around a third of all applications for film courses between 2009 and 2013 were submitted by women, with the proportion increasing slightly over the period. Admissions on these courses over the same period were exactly equal between women and men, which meant that women recorded a much better admission rate than males, 3,98 compared to 1,96 on average.

Figure 5: Share of graduates from film directing courses, 2009-2012 (%)



Sources: EWA report database – Survey
Base: SADA and Valand Academy

Looking at graduates during the period the gender balance is close to 50/50 as well. To keep in mind is that the number of admitted and graduating students is very low, 26 and 16 respectively for the whole period. The difference between admitted and graduated students is not caused by a high dropout rate, but rather that many of the students that got admitted during the period have/will finish their programmes after 2013.

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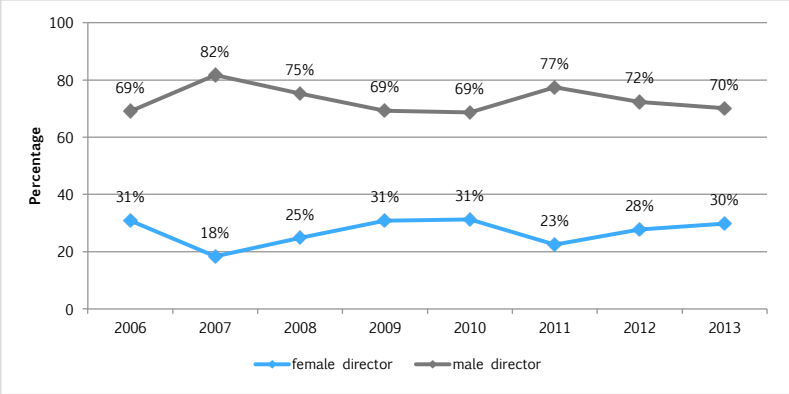
V. National Funding

The principal national funding source for film production is the Swedish Film Institute, a foundation financed by a combination of state funding and the Film Agreement, which stipulates a ten percent levy on cinema admission charges. About two thirds of the production funding is given by commissioners in advance of production. There is also an audience related support, based solely on cinema admissions at the national market. In 2013 an automatic funding scheme, given in advance of production, was also introduced. This support scheme is not handled by commissioners. As the total production budget did not increase, the budget for commissioners decreased as a result. The following figures refer to the funding by commissioners.

5.1 Fiction

Between 2009 and 2013 the share of funding to fiction that went to projects with a female director has been on average 27%. The female share is slightly higher if you look at the number of projects awarded, instead of sum of funding. This reflects that fiction films directed by women have lower budgets and get less funding per film.

Figure 6: National funding for fiction films



Source: EWA report database – Survey
Base: The Swedish Film Institute

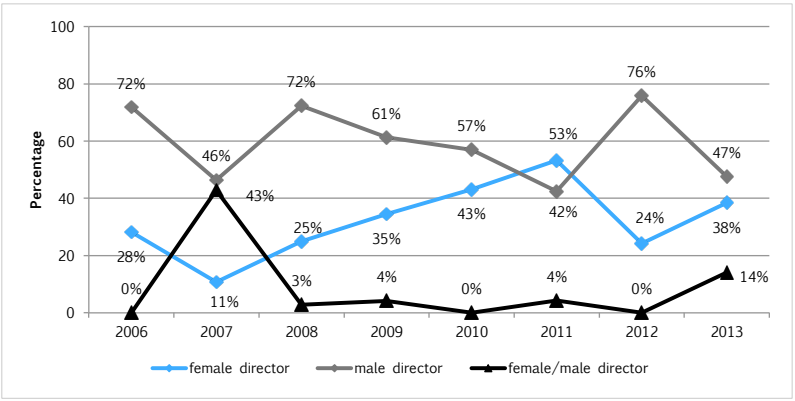
Looking over the eight years there has not been a clear trend, either up or down. Instead the female shares have varied up and down from year to year. Both the first year of the period and the last have a female share about 30%.

5.2 Documentary

On average 36% of the funding for feature documentaries was given to films directed by women in 2006-2013. The share was almost the same looking at the number of projects, instead of funding amounts. This reflects that female directors of documentaries have received as high funding amounts per film as male directors.

There has been a positive trend during the period, with female shares increasing from below 30% the first year to 44% in 2013. However the highest female share for the period was reached in 2011 and there was a steep decline in 2012.

Figure 7: National funding for documentary films



Source: EWA report database – Survey
Base: The Swedish Film Institute

5.3 Regional Funds

There are also four regional funds for film production in Sweden: Film Väst; Filmpool Nord; Film i Skåne; and Filmregion Stockholm-Mälardalen. The gender share figures provided by them in this case relate to number of films produced, rather than

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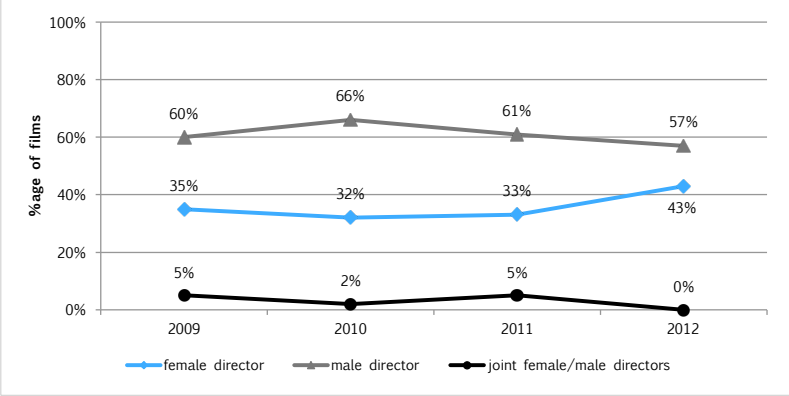
actual funding amounts. The data covers the years 2009-2012 only, and only fiction films.

Figure 8: Regional film productions



Source: EWA report database - Survey
Base: Film i Väst, Film i Skåne, Filmpool Nord, Filmregion Stockholm-Mälardalen.

On average 37% of the fiction films funded by regional funds during these years had a female director. The highest share was reached in 2012, with 43% of films having a female director.

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VI. Broadcast Funding

Official data including a breakdown of gender is not currently available for this sector. We have used title lists from the public broadcaster Sveriges Television (SVT) and the private broadcaster TV4 and matched these with gender data from the Swedish Film Institute. In both cases the figures include feature films released directly on TV. Again, the gender share figures relate to number of films produced, rather than actual funding amounts.

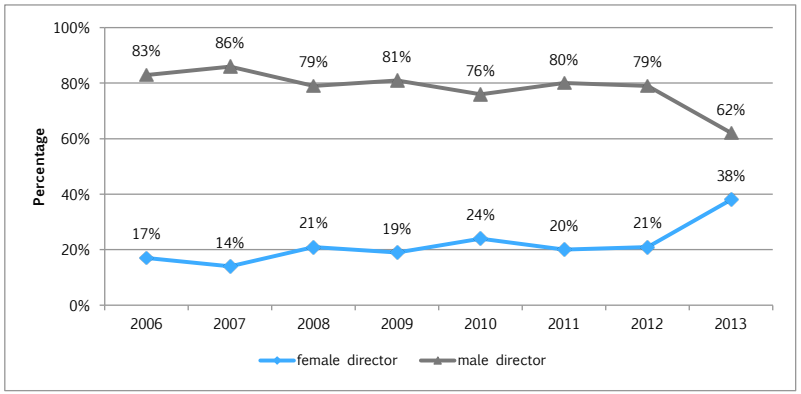
Data have not been provided for other private broadcasters such as Modern Times Group MTG AB; C more Entertainment AB; and SBS TV AB.

6.1 Public broadcaster – SVT

Figures for public broadcaster funding are available for the main national channel, SVT, for fiction but not documentary productions. These figures include Swedish minority co-productions.

On average 22% of the films funded by SVT in this period were directed by women. There was no increase of the female shares during most of the period, except for a dramatic increase to 40% the last year. Since the last year is a clear exception, it remains to be seen if this situation will continue.

Figure 9: Public broadcaster fiction productions



Source: EWA report database – Survey
Base: SVT, the Swedish Film Institute.

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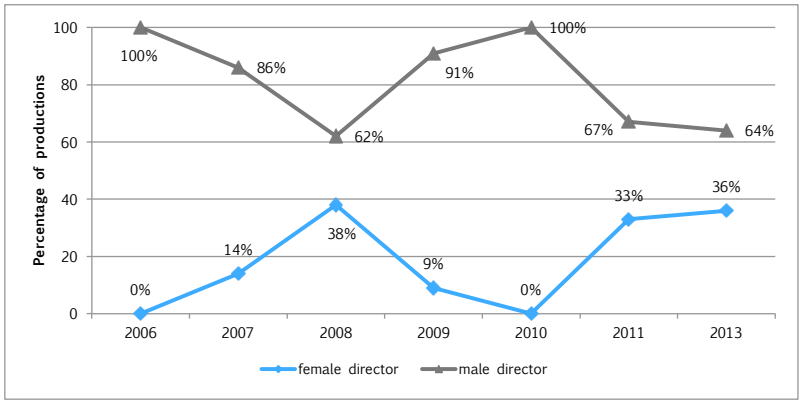
6.2 Private broadcaster – TV4

Looking at the private broadcaster TV4, projects with female directors have had a 23% share over the period. The highest years for women-led productions were 2008 and 2013, but the progression has been erratic. Data is missing for 2012.

Figure 10: Private broadcaster fiction productions



Source: EWA report database – Survey
Base: TV4, the Swedish Film Institute.

The total number of projects increased significantly in 2013. This was mainly due to investments in a large number of features made for direct release on TV. This was also the case in 2008.

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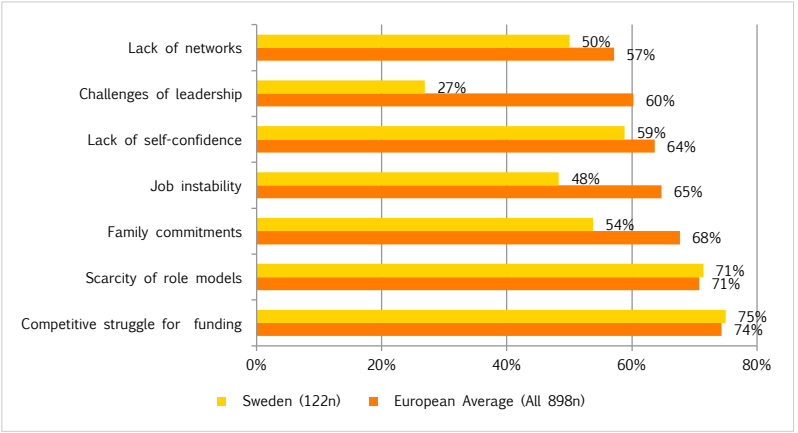
VII. Challenges for women

7.1 What factors discourage women?

According to the Swedish respondents the most important factor discouraging women from directing is the competitive struggle to secure funding. 75% applied to this statement. To a higher extent than in other countries they believe that this is the main obstacle.

The female respondents think that the competitive struggle to secure funding is a reason to a higher degree than the male respondents in Sweden. The women also think that scarcity of role models, lack of self-confidence, family commitments, lack of networks and job instability are more important than the men do. The only factor that men rank higher than women in Sweden is challenges of leadership.

Figure 11: Discouraging women from directing



Source: EWA report database – Questionnaire
Note: n = number of respondents

Additional Comments

"All of the above are reasons for both female and male directors' hesitation, except for models that men have a lot."

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"An unspoken quota for men."

"A constant reminder that it is difficult for girls to direct, and overall, that girls are not being taken seriously with regards to their ideas and aspirations."

"Hard competition particularly with regards to the commercial funders such as a high MG from distributors."

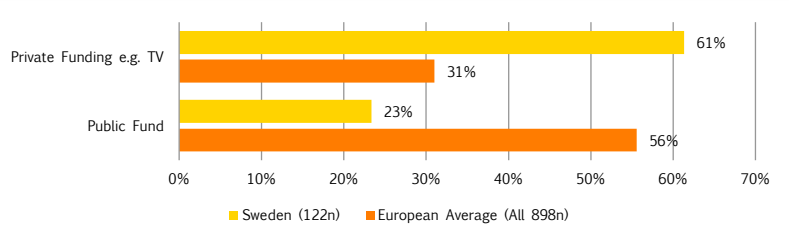
"I think that many women are not at all discouraged, we are here! We want !! (However, others think that way about women directors and yes, I think many women generally have a lack of self-confidence because we want to be the best and really know that we can everything before we do it. Models exist but have not been seen so much.)"

"The above reasons do not prevent women from becoming producers or screenwriters. As a director, I think that there is an advantage to plant a seed for the profession at an early age. There, a lack in role models and anti-technology-tradition is the greatest obstacles."

7.2 Does gender affect funder's decisions? - Questionnaire

In the questionnaire there was also a question about if gender affects funder's decisions. In Sweden like in the other countries there is a clear difference between the view of public funders and private funders. Whereas 61% of Swedish respondents think that a female director has a negative effect on a private funder's decision, only 23% believe it has a negative effect on a public funder's decision. 47% even believe a female director has a positive effect on a public funder's decision.

Figure 12: How does a female director influence the funding of a project? Negatively.



Source: EWA report database – Questionnaire

Note: n = number of respondents

In comparison with other countries the Swedish respondents think that there is a negative effect on private funders to a higher extent, and on public funders to a lower extent. This indicates a polarised Swedish funding landscape, with a sharp difference between public and private funders.

Looking only at female respondents, an even higher share believes that there is a negative effect on private investors. 80% of Swedish women think so, more than in any other country. The women in Sweden also think that there is a negative effect on public funders more than the Swedish men do. Of the women 35% think this, of the men only 2%.

7.3 What is the impact of being a parent?

65% of directors in the Sweden survey were parents. This is higher than in any of the other countries. The share is slightly lower for Swedish women, 61%, than for the men, 75%. Of the Swedish directors with children, 33% experience that being a parent has discouraged them from directing films. This is higher than the average for all the countries.

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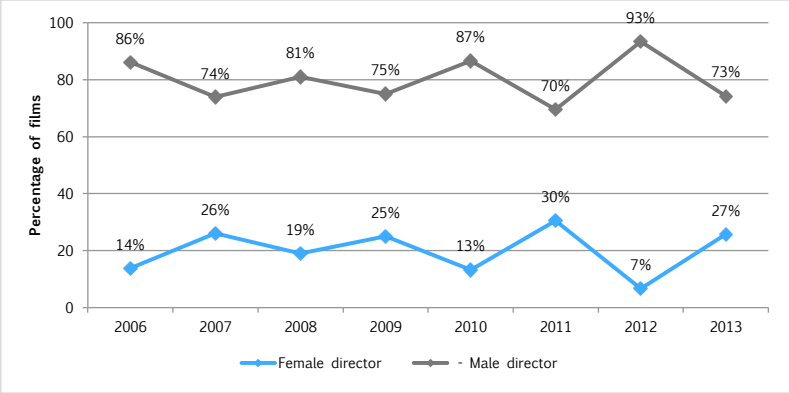
VIII. Releases

8.1 Share of fiction film releases

Looking at all national cinema releases, female directors' share is very low at 20%. But the share in 2013 was higher than that of 2006. Still though, the share of films that have a female director is lower than among projects funded by the Swedish Film Institute's commissioners. Films that are made without funding from commissioners are more often directed by men.

Figure 13: National fiction film releases



Source: EWA report database – Survey
Base: The Swedish Film Institute

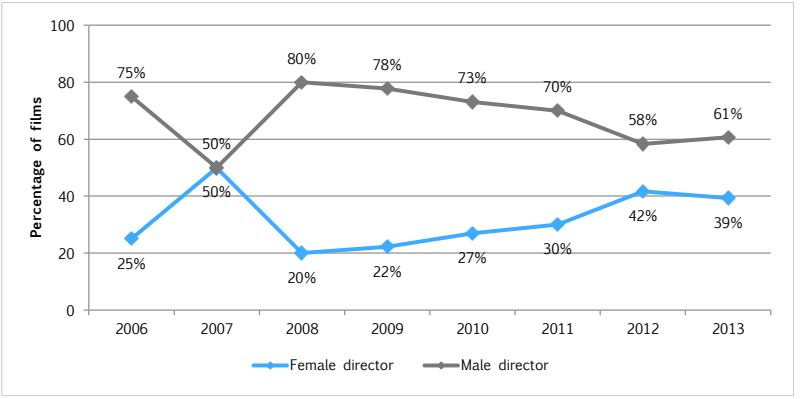
The digital revolution in production has led to an increase in the number of films released; not least low budget features made without funding from the Swedish Film Institute. However, looking at these films, almost all are directed by men. In this regard the digital revolution has had a negative effect on gender balance.

8.2 Share of documentary film releases

The share of films with female directors is higher among documentary cinema releases than among fictions. Over the period the average was 32% for documentaries. Like in the case for fiction films the female share has increased

from 2006 to 2013. However, the best year was 2007, with total equality, 50/50. After a dramatic drop in 2008, the female share increased steadily until 2012. Between 2012 and 2013 the female share decreased slightly again.

Figure 14: National documentary film releases



Source: EWA report database – Survey
Base: The Swedish Film Institute

8.3 Are people aware of women's low share of film releases in this country?

A majority of the Swedish respondents, 83%, reckon that films directed by women form less than 30% of all Swedish films released. Of their European counterparts 96% thought female directed releases were this low. Respondents were not asked to distinguish between documentary or fiction films. With regard to the share of female directed films in all European films released, a majority, 77%, of Swedish respondents thought women's share would be less than 20%. This was higher than the European average of 64%. In other words, the Swedish respondents believe gender equality to be closer in Swedish film than in European film in general.

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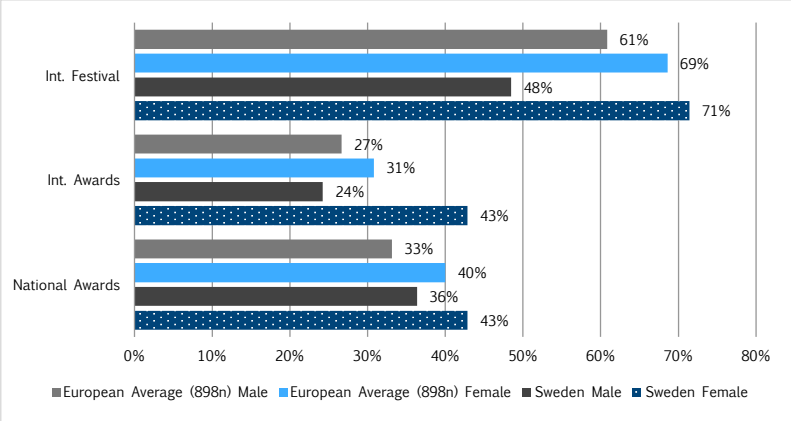
IX. Awards and Critical Reception

9.1 Nominations and Awards

We coded nominations and awards for the 49 Swedish feature films (fiction and documentary) that were released in 2013. The results show that films directed by women were more likely to win acclaim than those directed by men. This is in line with the rest of Europe, where on average it was found that a film with a female director will receive and/or be nominated for awards in 51% of the cases, compared to 45% of films with a male director.

In Sweden 43% of female-directed films received national awards, compared to 36% of male-led films. Looking at international awards, the Swedish figures were 43% for female-led films and 24% for male-led films.

Figure 15: Awards and festivals by gender of director



Source: EWA report database – Questionnaire

9.2 Festival participation

In general across the different countries 83% of female-directed films participated in international festivals, compared to 73% of male-directed films. In Sweden the difference was even bigger, with 71% for films directed by women and 48% for

films directed by men. On average Swedish films with a female director participated in 8,57 international festivals, compared to 3,27 festivals for films directed by men.

Looking at the most important international film festivals, Swedish films directed by women participated in Venice and IDFA in 2013. The Reunion by Anna Odell received the FIPRESCI award for Best Film of Orizzonti and International Critics' Week in Venice and the Forest of the Dancing Spirits by Linda Västrik received the Peter Wintonick Special Jury Award for First Appearance in Amsterdam. Swedish films by female directors also participated in Venice in 2010 (Beyond by Pernilla August) and 2012 (Eat Sleep Die by Gabriella Pichler), in Berlin in 2011 (both Shemonkeys by Lisa Aschan and The Crown Jewels by Ella Lemhagen) and in 2015 (both Flocking by Beata Gårdeler and My Skinny Sister by Susanna Lenken) and in Toronto in 2009 (Glowing Stars by Lisa Siwe).

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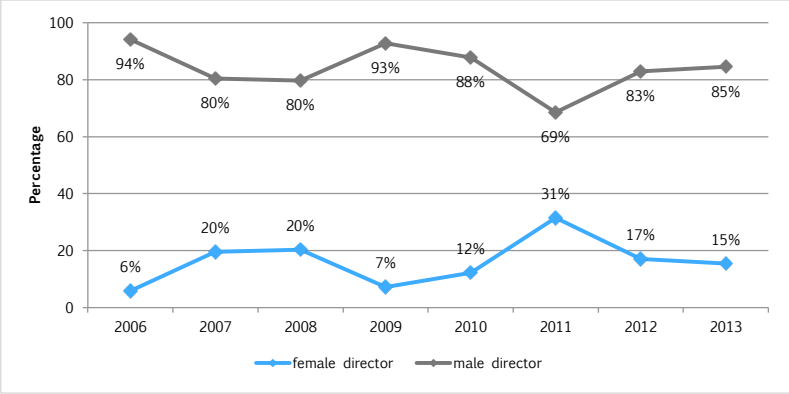
X. Admissions

10.1 Share of admissions for fiction films

The share of box office admissions for Swedish fiction films with a female director has varied considerably from year to year, but was never higher than 31% of the total, averaging over the period at 15%. There is no significant progression across the period. There was an increase in 2007, but this did not turn out to be the start of a continuing trend. In 2013 the female share was lower than in 2007.

Figure 16: Box office admissions to national fiction films



Source: EWA report database – Survey
Base: The Swedish Film Institute

The results on the cinema market affect private investors like distributors and venture capitalists as well as the audience-related support scheme administrated by the Swedish Film Institute. Hence it can be an explanation for the low share of female-directed releases.

10.2 Admissions for documentary films

Looking at documentary films the situation is totally different. Half of the years female-directed documentaries represent a higher share of admissions than male-directed ones. On average female-directed films had 50% of admissions. This is a

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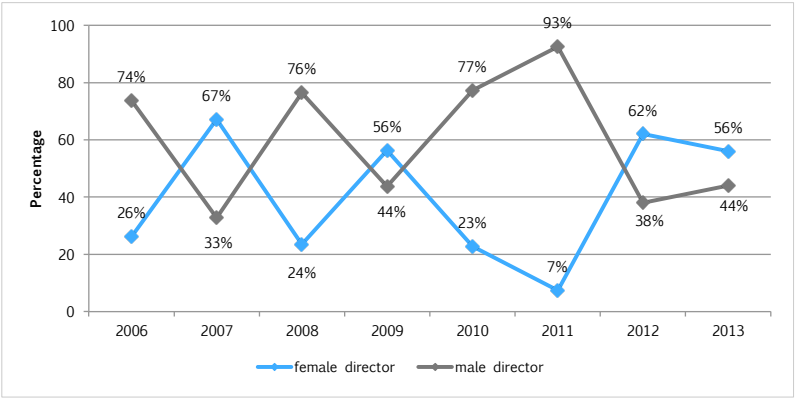
higher female share than when looking at the number of documentary releases. Hence, female-led documentaries reach a bigger audience per film than male-led documentaries. This proves that genre is of higher importance to a film's admissions than the gender of the director.

Figure 17: Box office admissions to national documentary films



Source: EWA report database – Survey
Base: The Swedish Film Institute

10.3 What affects box-office performance?

The number of screens a film is released in can affect the admissions to a large extent. Looking at the five most successful films 2011, 2012 and 2013 directed by women and men respectively, films directed by women were released in a lower number of screens, 92 compared to 192 for films directed by men.

The budget of a film could also be of influence. Feature fiction films with funding from the Film Institute's commissioners 2006-2013 had an average budget of 1.99 million euros when directed by women, compared to 2.50 million euros when directed by men.

Most respondents in the questionnaire recognised inadequate support in the "route to market" as the root of the problem. 87% recognised ineffective publicity and advertising as very important or important; 85% recognised poor distribution strategy as very important or important. The film's subject is also important according to 84% of respondents.

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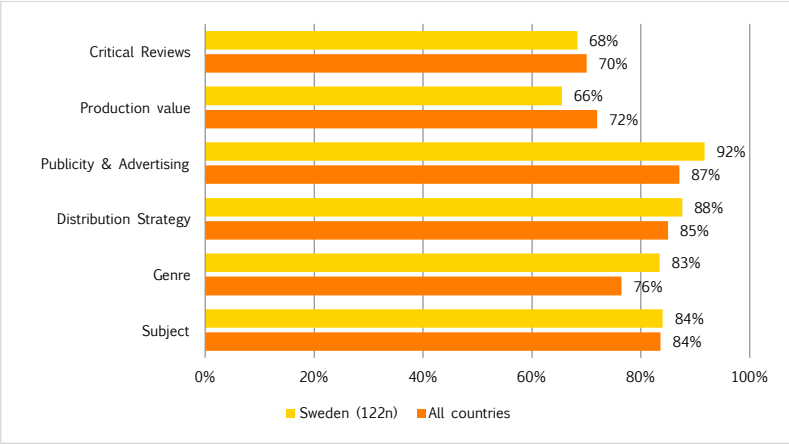
Figure 18: What affects box office performance?



Source: EWA report database – Questionnaire

To a higher extent than in other countries the Swedish respondents think that genre, distribution strategy and publicity and advertising affect the box office performance of films. Both women and men believe P&A to be the main issue. However, the women (as in other questions) experience it more strongly.

Other Comments:

"Famous actors."

"'Word of mouth'. If a film is good, it spreads, if only the distributor /cinema owner dares to keep the film in the repertoire."

"That the film is produced by a company that has experience in feature film productions that caters to a large audience is also important to be able to reach out."

"A good story, something that gives the film attention (brand, etc)."

"Number one is quality – that the audience gets something out of seeing the film – AND that the story has relevance."

"Big marketing budget."

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"I think the question is strangely formulated. The above is of course important for all films..."

10.4 Did the gender of the director affect the choice of a film?

Only 11% of Swedish respondents think that people consider the director's gender when choosing a film to watch. Although, 63% recognised that the gender of the director would affect the way a story was told. In both cases the Swedish figures were lower than the average for all countries.

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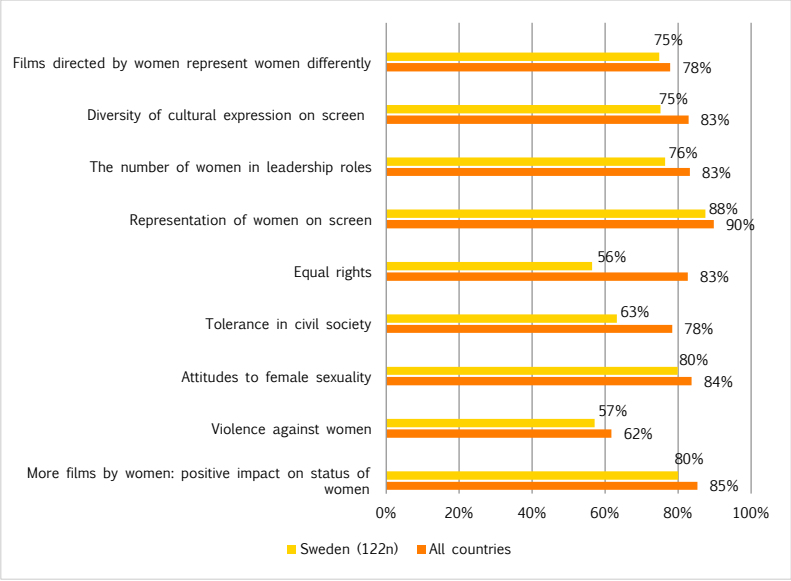
XI. Social impact

According to the Swedish respondents the most important effect of women's films is the representation of women on the screen. 88% agree with this statement, which is higher than the average for all countries. A high share, 80%, also thinks that it would have a positive impact on the status of women in the country if more films were directed by women. But the average for all the countries was even higher, 85%, making it the most important impact overall.

In general the respondents in Sweden, like elsewhere, believe that films directed by women have a wide social impact, including areas such as attitudes to female sexuality (80%), the number of women in leadership roles (77%) and violence against women (57%). To keep in mind though, is that most of the respondents are women active in film production. If the question was directed to the general population the result might have been different. At least it is clear that the male respondents believe these films have a social impact to a lesser degree.

Figure 19: Films by women have an impact on (...)



Source: EWA report database – Questionnaire
Note: n = number of respondents

XII. Policies for Change

12.1 Existing measures for gender equality in the industry

The Film Agreement between the Film Industry and the Swedish Government, which together with other policy decisions within the Ministry of Culture governs the Swedish Film Institutes activities, included a statement to work towards increased gender equality for the first time in the agreement for the period 2006-2012. A goal was set stating that both women and men should be represented to at least 40%, counted as the number of projects receiving support in the categories scriptwriter, director and producer. This goal was made even sharper in the agreement for the period 2013-2015 and set to 50/50.

In order to achieve the latter goal the Swedish Film Institute presented a five point action plan for gender equality in 2013. The plan includes a range of activities including strengthening female film makers, to increase the awareness that contrary to popular belief there are female film makers. It also includes a plan to intensify data monitoring of the female representation. A purpose was to identify good practices in improving women participation in all different parts of film; production, distribution, exhibition, schools etc.

In the support schemes gender is an important perspective alongside others such as artistic quality, project economy, feasibility etc. There are no quotas in place but since the implementation of the action plan gender equality is continuously monitored and discussed in meetings related to funding decisions.

Since the introduction of the goal in the Film Agreement the gender equality has increased, and even more so after the introduction of the action plan. In 2014 the funding of feature fiction films from the Film institute's commissioners was evenly divided between female and male directors for the first time.

For a more comprehensive description of the action plan please see the document on Filminstitutet.se and the discussion on this topic in the chapter Gender Equality in Swedish Film in Making Change. Nordic Examples of Working Towards Gender Equality in the Media! Eds. Maria Edström & Ragnhild Mølster (Nordicom, Gothenburg 2014).

Gender equality has been an important perspective for Swedish Governments for several years. This holds true regardless if it has been a left- or rightwing government. There are perhaps no other measures on the government level that affects the film industry as much as the goal set in the Film Agreement, but of

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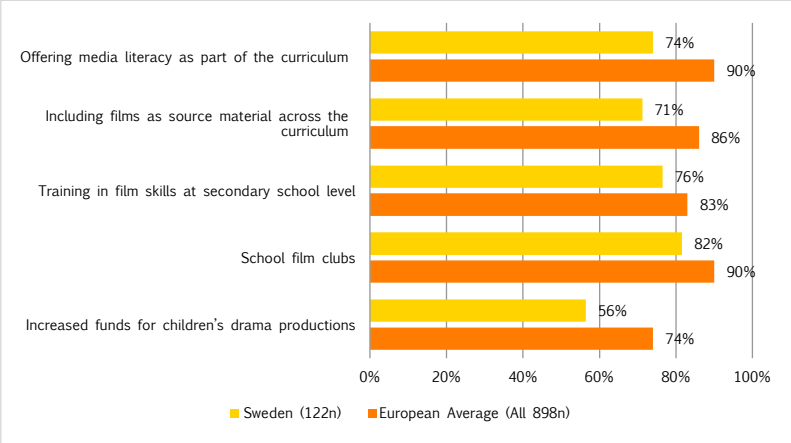
course the emphasis on gender equality is most likely affecting the industry. The measures used at the government level are more focused on encouraging than on forcing by introducing quotas.

12.2 Preparing the ground in school education. – Questionnaire

In our respondent demographics most, 89%, had decided to become a director after the age of 11, which is line with the transnational average. 85% made their first film after the age of 11.

Of the Swedish respondents 88% feel that it is important to focus on film education in school. The most important measure in school according to the Swedish respondents is school film clubs. However, fewer in Sweden than in the other countries think that this is important, 82% compared to 90% for all countries. There is also a difference between Sweden and the other countries regarding the other measures, with lower shares for Sweden overall. For example, in Sweden 74% think that it is important to offer media literacy as part of the curriculum, in all the countries 90% think that this is important.

Figure 20: Measures in schools



Source: EWA report database – Questionnaire
Note: n = number of respondents

Other comments:

"Choosing films by female directors when screening films in school."

"Visits by female directors and film workers, generally believe it is important to have film clubs, role models, technology access, etc. in the leisure time rather than in school, a little misdirected question."

"Provide education about the image's role, how we interpret contemporary life through the image."

"Making film technology accessible for women so that they can make the movie without having to be dependent on the filmmakers (who are often men as it looks now)."

"Practical film education in schools where girls can learn that it is not an impossible threshold to start making movies."

"Directing a film is not important. Now with all material on the internet, there are so many other ways to create. Moreover, film is a group project. The director is one of the crowds and has not the last word. The producer has it. And the script is probably the most important."

"Specifically teach students to see through/read Hollywood dramaturgy, from a racial, class and gender perspective. And to teach students to handle simple recording, editing and distribution technologies. So that they learn that anyone with a mobile phone can record and edit a movie and distribute it online. That by using a computer it is also possible to edit and add audio/music and make effects. To truly democratize the language of film. The problem is that teachers themselves do not know – training is required."

"Teaching in leadership."

"Encouraging and conscious teachers."

12.3 Measures to encourage women directors into the industry – Questionnaire

Several measures to encourage women to become directors were presented to respondents. The two most important factors for encouraging women are, according to the Swedish respondents: targeted support schemes to encourage women to develop film projects (79%), exhibiting more films directed by women on national television and cinema screen (79%) and affirming the role of women during school

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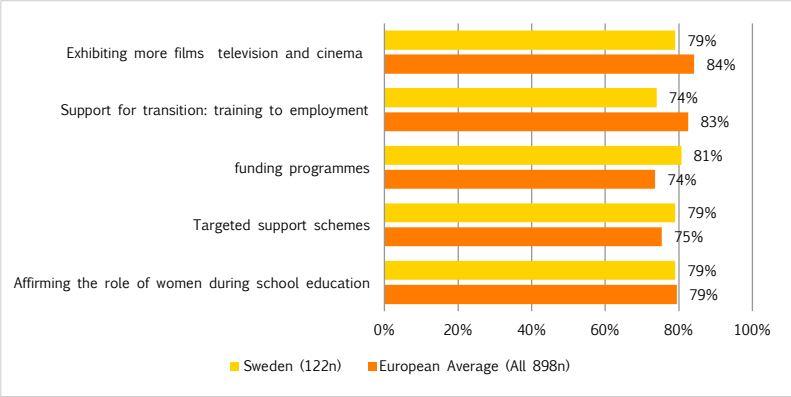
education (79%). In comparison with other countries they think it is more important with funding programmes and to target support schemes. Regarding exhibiting more films directed by women on national television and cinema screens there are clear gender differences. Women think exhibiting more films is the most important factor. Men think that it is the least important.

Figure 21: Factors encouraging women to direct



Source: EWA report database – Questionnaire
Note: n = number of respondents

Other Comments

"That also the advertising and television industry are working for this."

"Gender training of managers in industry. Those who employ, invest, etc."

"Producers and film/TV companies must dare to try to bring in more women, gamble a little."

"Support for women to develop and direct the big budget films through collaborations with distributors."

"That women get the same encouragement from senior colleagues and that geniuses are not only men."

"Courses for male staff in the film industry to understand that a woman has the same value as a man."

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"The system of film support should have a stop function for directors with sexist behavior or message. Anonymous surveys can be done after each filming with the team. The result should be taken into consideration next time funding should be provided. It could quickly clean up the industry of sexism and make way for more women."

"Working to get more women to other male-dominated professions in film. For example photographer, sound."

"Teach girls in the primary school to handle simple recording and editing technology. Conquer the language of film. There may be a bias, but I think the guys (for whatever reason it may be, tradition, role modeling, encouragement) takes this technology to a greater extent. Early learning to control a camera and film language, feel the magic of cutting together images to create a story, I believe is a strong basis for an aspiring director. This must be done early…"

"In Sweden men 50 years old are now having a very hard time making films unless they are already a success story since everything is about getting as many women as possible to direct. The discrimination has become the other way around. If the Swedish Film Institute has to choose between two equally good projects they will for sure chose the female director just because it's a woman. A male auteur with a female protagonist has less chance than a female auteur with a male protagonist. That is wrong…"

"Greater acceptance of debut later in life, not so much focus on age in talent development."

"Increase opportunities to combine family/parenting with career."

12.4 Policies to sustain women's careers in the film industry– Questionnaire

Respondents were offered a range of policy measures to consider. The most important policy measure according to Swedish respondents is increased support for first and second time directors, with 81% in support of that. However, the other counties had an even higher share supporting this claim. The other countries were also notably more affirmative concerning the policy measures additional training opportunities, increase in schemes to develop networking skills, setting up a database of women directors, greater equality of representation on commissioning panels, and greater equality of representation in policy-making committees. On the other hand, slightly more Swedish respondents think that offering mentoring schemes and a gender quota for any state funding programme are important.

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Looking specifically at Swedish women, the most important policy measure is greater equality of representation on commissioning panels. For men it is increased support for first and second time directors and offering mentoring schemes.

Other comments:

“More female film commissioners.”

“I have now been doing this for several decades; I was involved with the start of Swedish Women's Film Association. I think now it would be good with targeted support.”

“I see no reason to encourage any specific group for a specific profession. Allow people to have free elections. Accept the choices they make, even if it does not comply with your wishes.”

“Requirements for distributors and cinema owners.”

“The problem is not that more women should be encouraged to become directors. The problem is that those who are trained directors in film schools and who have shown that they can direct must be allowed to do so. Often inexperienced guys without film college degree get first in line to attractive directing jobs.”

“Targeted development support to the stories of women, whether they are written/directed by men or women. May the best anonymous manuscript win. Make sure that those who read the anonymous scripts are 50-50 female – male.”

“Stop seeing the director as auteur and sole sender of a movie. If we could raise the status of the producers and writers in comparison with the director, women in the film industry would get a big boost too. Which would also help female directors. And especially the quality of films.”

“That women dared to think "broadly". That more productions dared to be both personal, but at the same time addressing the audience. Too divided between narrow personal film (low-budget and often of films) and the wide audience- film (directed by men). Women should be more visible in humour and excitement – areas that have been "male".”

“To survive economically as a director, it is important to combine feature films with television and advertising. Feature films can take years to do and over the years it is important to make a living. That is what we have problems with in Sweden.

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Television and advertising is still an unequal industry to a greater extent than film where we have come further at least as they apply to the money that is public and not private…”

“Pressure/incentives for the commercial/private actors such as distributors.”

“The problem is not that women do not want to direct, the problem is the attitudes faced by those who wish. Men who guard their privileges control the film industry, they think they know what the audience wants, namely the male gaze. In a thriller the dead woman's body is panned, but not the man’s, etc. If they disappear and are replaced by gender-conscious people because they do not receive financial support for films with sexist messages, the equality will increase.”

“Targeted actions towards girls in higher education programs in directing, who do not manage to enter the labor market as directors afterwards. If girls are educated in national film shools, it is a scandal that the film industries then deny them entry. Let female first-timers do crime series and such as much as male first-timers. It is an entry point for many men (often from the advertising industry) and could have been that for girls as well.”

“Think rather of general changes for both women and men in terms of better working conditions for freelance film workers, and greater development support that enables one to make a living without compromising family income or having children in 30-40s. And a review of freelance incomes combined sick pay and the implications for the level of Temporary parental benefit for care of children, etc. There is much to do.”

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Conclusion

The number of women qualifying from film school is around 50%. But their presence in the industry drops thereafter. Major bottlenecks are national film funding, public and private broadcasters and the cinema market. The number of female-led films being funded by the Film Institute has increased clearly already, and female directors were behind 50% of all feature films funded by a commissioner in 2014. But still actions are needed concerning the other players /factors mentioned above. Like in the other countries, female-directed films have received awards and participated in international film festivals to a higher extent than male-led films. Hence, films directed by women cannot be said to lack quality. Rather, the poor box office results for female-directed films can be explained by factors such as genre, production budget size, marketing budget size, distribution strategies and cinema programming. The results on the cinema market affect private investors like distributors and venture capitalists as well as the audience-related support scheme administrated by the Swedish Film Institute. Hence, to achieve a higher gender balance in the Swedish film industry these instances should be targeted. There are more men applying to film schools and more men that direct films produced without support from the Film Institute. This suggests that the interest in and self-confidence regarding film production is generally lower among women.

If national film schools would involve the film industry in the education to a higher extent, emerging female directors could have a better chance to get established after graduation. There is also a need to put requirements on all broadcasters, public and private, to keep data on gender equality in commissions, acquisitions and programming. Measures to encourage higher budget, genre movies with female directors are also needed. Distribution strategies for films directed by women and targeted support for publicity and advertising should be reviewed. Lobbying is needed to make distributors and venture capitalists work for gender equality in film investments, and to make cinema owners/programmers work for gender equality in film exhibition. The current audience-based support scheme should be evaluated with a gender perspective and an international focus in mind. Finally, measures are needed to increase the interest/self-confidence in and technical knowledge of film/video making amongst girls, for example by supporting film clubs in schools.

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APPENDIX VII

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UK

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Introduction

This report is one of seven from countries participating in the research project set up by the European Women's Audiovisual Network, *Where are the women directors?* This has come about in response to growing concern about the marginalisation of female directors in world film culture and the belief that our societies benefit from inclusion, proportionate representation and plurality of voices.

The representation of women in film and television directing is low in comparison with other creative sectors. Creative Skillset's *Employment Census* of the creative media industries (2012) found that women represented 36% of the total workforce. In the same year a survey of female directors in the theatre found that they were 24% of those employed.[1] However, the British Film Institute's investigation found that the proportion of women directing UK independent film between 2010-2012 was a mere 11%.[2]

There have been periods in UK film and broadcasting history, notably in the 80s and 90s, when it seemed that the problem of gender discrimination was being addressed. However, for the years covered by this report, 2006 – 2013, this is manifestly not the case. Measures are now urgently needed to sustain female directors' careers in a very unbalanced marketplace and based on its findings this report makes fifteen recommendations for affirmative action, some based on best practice in other countries.

During the two years of this report's production several diversity initiatives have been set in motion to incentivise change, notably *Project Diamond* for the television industry and the British Film Institute's *Diversity Guidelines for Production*. These are welcome steps in the right direction but insufficient to address the deep-rooted problems identified here. Assuming there is the political will to achieve gender equality for UK directors, stronger, coordinated action will be needed across the film and television institutions. Ultimately inclusion can only be to the benefit of the industry. It will open it up to the full potential of female directors' talent and perspective.

[1] Charlotte Higgins, Stage & Screen, 10th December 2012
[2] Succès de Plume: Female Screenwriters & Directors of UK Film, 2012-2014

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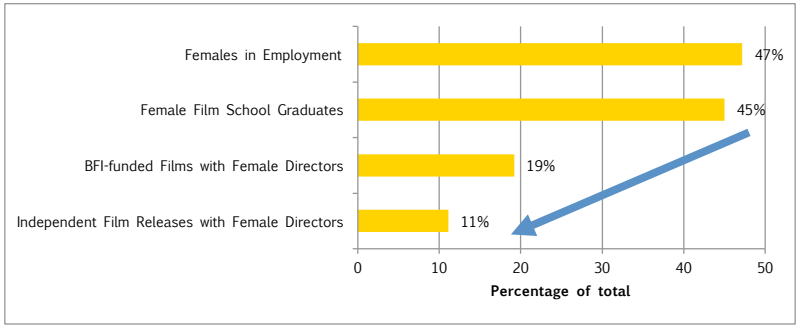
I. Executive Summary and Recommendations

In an overall population of 63 million people (2011), women in the UK comprise just over half. As women's share of those in employment is just over 5% less than men (47%) so the share of female directors graduating from film school (45%) is indicative of equality for entry into the industry. However there is a major decline thereafter with women accounting for about 22% of film directors registered by Directors UK, even though not all these are active.

In the UK 94% of respondents felt that gender inequality exists, one of the highest results amongst the seven participant countries.

The challenge faced by female directors is to sustain their careers in a male dominated market place, where men receive between 80 and 90% of national funding and female directed films are considered less commercially viable. This context perpetuates assumptions which are often unfavourable to women, and when aggravated by other factors, such as the freelance nature of the profession or the demands of parenting, deliver a very imbalanced film culture.

Figure 1: Women directors in the UK film industry



Source: EWA report database - Survey

The statistics needed to give a comparative understanding of what is happening across the regions and nations of the UK film and broadcasting industry do not exist. Where data does exist there is little evidence that it is being monitored or structured into coherent, institution-led policies for change. This is regrettable given that inequality for female directors has persisted throughout the period.

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In spite of gender inequality, EWA's data for 2013 indicates that the critical reception for films directed by women is very positive: more films reached international festivals and won awards than did those directed by men. Also, between 2010 and 2013 in fiction, female directed films with BFI Lottery funding had higher average admissions per film than male directed films.

Education and Entry

Respondents to the questionnaire felt that by increasing the number of female directed films in the curriculum and in film clubs, and by affirming womens' role in the industry, school students would be better prepared to take on the career.

Apart from attending film school the principle entry points for women directors are through making shorts and documentaries. A greater number than in other European countries also find their way in through directing theatre and television drama.

Funding

Competing for funding is a key challenge for women. Prejudice, conscious or unconscious, in favour of male directors and male-focused stories perpetuates inequality. Less opportunity to work means less experience, and a lower profile for female directed films.

In television, questionnaire respondents identified gender discrimination more with the private than the pubic sector, though it was recognised in both.

Female director's share of BFI Lottery funding averages 11%, with a slight increase in funding between the two periods of four years particularly for documentaries, although the number of documentaries supported is very low.

In public service television female directors accounted for only 13% of all episodes of 60' drama and documentary, and they are particularly absent in drama.

In feature films supported by television, BBC Films and Film 4 have commissioned 20% and 19% of female directors respectively.

The overall pattern shows very large fluctuations which can lead to years with no commissions from female directors given the low starting point for women. The number of films supported annually by the BFI Lottery Fund has normally been below five in both genres. At BBC Films and Film4, commissioning numbers are

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erratic with little evidence of overall progression. In broadcast drama several drama series have never commissioned a female director.

Evidence from Film 4's scheme for new directors, *Coming Up,* is encouraging, a beacon for what might be achieved, with women directors accounting for 41% of its productions. However, for other first entry schemes such as Creative England's *iFeatures* and Film London's *Microwave* the average share is under 23%.

Generally, where budgets are high, the presence of female directors decreases. In television, far fewer female directors get the chance to direct high-end drama. In film, female directors are least present in the high budget productions and their share of the average spend per film from the BFI Lottery fund is 14% less than the share for male directors.

In the questionnaire, women were aware that they needed greater support to break through into the higher budget (deemed more commercial) sector.

Significant public funds are being invested in film in the regions and nations – approximately £87.5 million over six years between 2006-12. However, there has been no systematic, gender-based monitoring of applicants or awards, even where funds claim to operate diversity and equality policies.

Most female directors who are parents are not discouraged by the competing demands of parenting itself. The problem is the industry's lack of adjustment to the way in which it affects career progression, for instance when women re-enter the market after starting a family, or require childcare support during production.

Reaching the audience

For the BFI lottery funded films, the share of female directed films released (16%) compares well in relation to their percentage share of production, (11%). The overall share of releases for all independent films is lower at 11%.

There has been a significant increase in the audience per film for female-directed, BFI fiction. Admissions per film have increased from approximately 85,000 to over 322,000 in the second four year period, just exceeding audiences per film for their male counterparts. For documentary, both female and male-directed films have seen a decline over the period, though relative to the number of releases, this has been steeper for male-directed films than for female-directed films.

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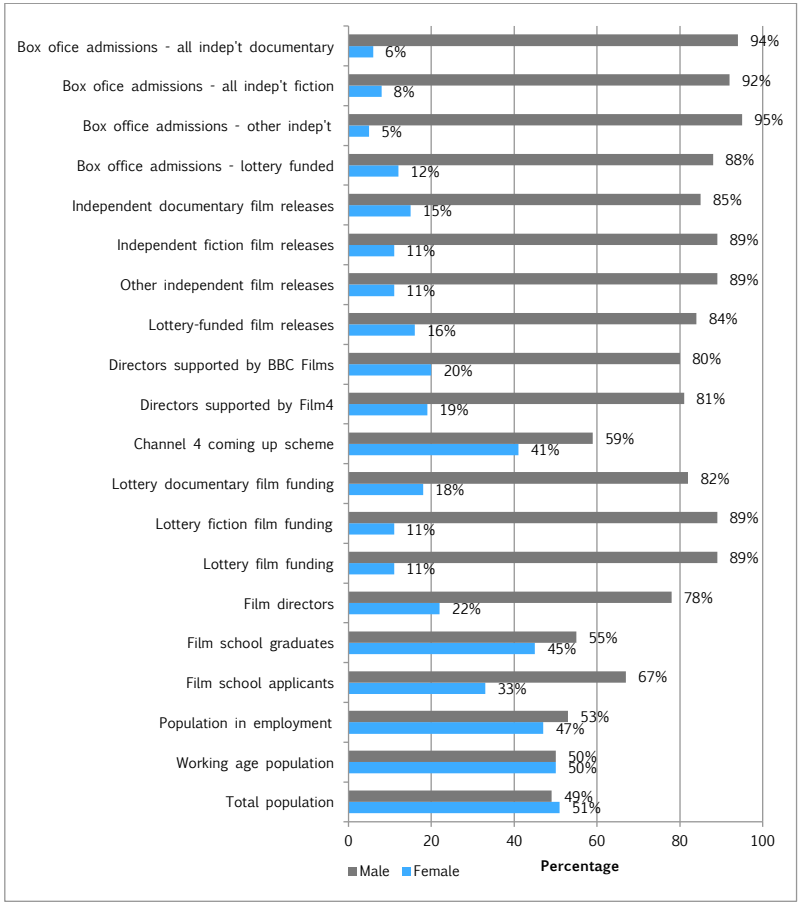
The way forward

UK respondents to EWA's questionnaire agree universally that increasing the number of female directed films would change the representation of women in UK society. The proportion of those feeling that this would increase the presence of women on our screens (96%), affect women's status in society (94%), and impact positively on equality (92%) was significantly higher than EWA's European averages.

Figure 2: UK Independent Film: Gender Shares Across Key Indicators



Source: EWA report database - Survey

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Recommendations

1. A co-ordinated approach is needed to data gathering, policy development and policy implementation at national and regional level, with systems in place for annual monitoring and reporting.

Data Gathering

2. National and Regional funding organisations should systematise their data collection strategies to facilitate a nationwide analysis.
3. All education, commissioning, funding and distribution institutions should keep statistics on gender equality as a compulsory part of their programme. This should include data on applicants and commissioning teams as well as places/awards. Where applicable it should also include gender data on genre, budget and how many films the applicant/beneficiary has directed.
4. All broadcasters, whether public or private, terrestrial or on-line,, should be required to publish statistics on gender equality in relation to commissions and acquisitions.
5. The BFI's Statistical Yearbook should include statistics on gender and diversity in the *Talent and Directors* section.

Education

6. More films directed by women should be included in the A-level syllabus and initiatives taken to promote female role models to younger students.

Production Funding

7. Minimum 40% targets should be set for all public funding, whether from the BFI or public service broadcasting, to be achieved by 2020. These could be assessed over 3 year periods to take into account annual variations in applications. Appropriate structures should be put in place to monitor progress.
8. Measures should be set up to support women wishing to direct higher budget genre films and drama, including mentor programmes and percentage targets for their inclusion in this level of production.
9. Gender parity should be observed on all commissioning panels and training provided to raise awareness of gender equality issues. Vigilance over commissioning trends is especially necessary given the erratic figures from year to year, and the fragility of recovery for female directors where it exists.

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10. Measures should be taken to address the needs of parent directors including adjusting tax allowances, allowing budget lines for childcare during production, and observing age neutrality on schemes targeting first and second time directors or those wishing to re-enter the profession.

Reaching the audience

11. Strategies should be reviewed to create a more commercially viable environment:
    - Much greater support for publicity, advertising and distribution strategy
    - a Europa Cinema type network to enhance promotion, circulation and box office runs of successful films
    - percentage based subsidies to incentivise screenings of female directed films
    - Requirements that publicly funded publications and media observe greater gender parity to assist female directors' profile
12. Broadcasters should be encouraged to include more female-directed films on their channels and platforms

Further Research

13. Funds should be available to advance understanding of the factors for the low presence of female directors. Areas would include:
    - analysis of female directors' projects and their journey through the development and/or commissioning process
    - case studies of particular films and their route to market focussing on publicity, advertising and distribution
    - analysis of marketing spend in relation to gender of director
    - analysis of critical response and gender parity in press and media coverage
14. In general, measures to address gender inequality should not be subsumed in initiatives seeking to address under representation more widely.
15. To address the scope of these recommendations in a coherent way, EWA recommends that a national symposium be held for key stakeholders to respond to the report's findings and recommendations.

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II. Methodology

The report's findings are based on two sources:

1) a quantitative survey with sixteen categories giving available data on the presence of women directors and their films in the UK industry from film school to cinema exhibition.
2) a questionnaire sent out through professional institutions to almost 900 respondents of which the UK respondents, male and female, comprised 111.

Findings from both sources are presented alongside in this report to build the emerging picture.

2.1 Quantitative survey

The research covers the period 2006 – 2013. To assess trends across highly variable annual statistics for film production and release, data from these eight years has been divided into two four-year groups.

The data covers documentary and fiction film of 60' and over, in both the film and public broadcasting sectors, although information on gender equality in the broadcasting sector has been difficult to access and is incomplete.

This report uses the country of origin allocated by the BFI Research and Statistics Unit.[3]

UK film is based on UK independent film i.e. films made without creative or financial input from the major US studio companies: [4] It should be noted that evidence presented by the Geena Davis Institute at the London Film Festival, 2015, indicates that female directors' share of UK/US productions is significantly lower than their share of UK Independent productions.[5]

Data on national film funding is specific to the British Film Institute (BFI) Lottery Fund. There are national funds distributed through other national and regional

[3] a UK film is one certified as such by the UK Secretary of State for Culture, Media and Sport under Schedule 1 of the Films Act 1985, via the Cultural Test, under one of the UK's official co-production agreements or the European Convention on Cinematographic Coproduction
[4] Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment.
[5] For the period studied by the Geena Davies Institute, womens' share was 9.1% of UK/US productions and 27.3% of UK independent production

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agencies but these have been reorganised during the period and, with the exception of Northern Ireland, reliable statistics on gender are difficult to track.

Films with more than one director of different genders have been allocated proportionately.

Production and development funds can be allocated across more than one year. Since there is usually a two-year lag between production and release, production and release figures do not correspond exactly.

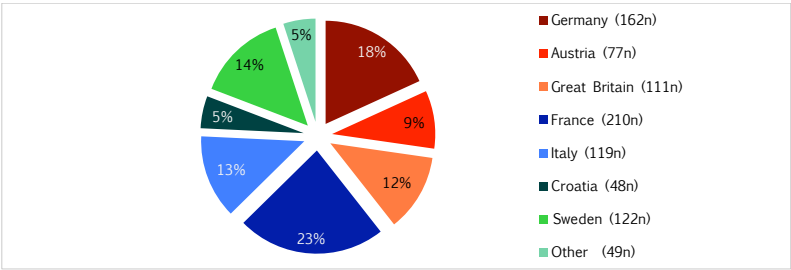
The survey's statistics for funding, releases and admissions have been provided by the British Film Institute Department for Statistics. Additional statistics have been sourced from company reports, Directors UK, the National Film and Television School, websites, and other national and regional agencies where relevant. Much of the data on gender has had to be mined specifically for this report.

The data has been analysed and processed by Sheffield Hallam University's Centre for Regional and Social Economic Research.

2.2 Qualitative Questionnaire

In July 2015, the questionnaire was distributed on-line through professional organisations of the industry including the union, BECTU, Directors UK, the National Film and Television School, the independent producers organisation, PACT, and Women in Film and Television, WFTV. One hundred and eleven respondents answered from the UK representing 12.5% of the total of 898 respondents.

Figure 3: Country Shares of Questionnaire Respondents



Source: EWA report database - Questionnaire

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Of the respondents the majority have experience in three creative sectors: 62% described themselves as directors, 52% as screenwriters and 37% as producers. The rest are spread across all sectors of the industry including film funders, development executives, students and critics. The average age was 42 so most were experienced in the industry. Since only 8% of respondents were male we have not given gender breakdowns for specific answers.

Several questions invited respondents to select more than one option so results do not always add up to 100%. Where respondents select on a 1-4 scale, results are based on 'applies fully' and 'applies'. Exceptions are noted.

The data has been analysed and processed by Rostock University's Institute for Media Research. To take account of national contexts of interpretation, national researchers have made observations where relevant.

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III. Women's Presence in the industry

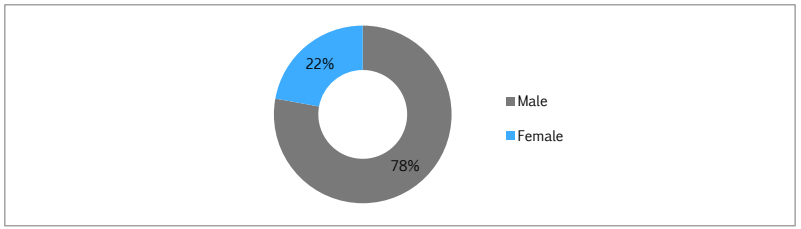
3.1 Does gender inequality exist?

In the UK 94% of respondents felt that gender inequality exists, one of the highest results from the 7 nations in the study.

3.2 Number of directors active in the industry

This can only be estimated. There is no registry of directors available. Female directors accounted for 107 (12%) of the 895 UK independent films released between 2006 – 13, with a higher share in documentaries (15%) than in fiction (11%). The numbers of female directors involved would be lower given that several would have directed more than one film. When "feature film directors" were selected from the members of the Directors UK website in July 2015, there were 456 listed, of which 101 were female and 355 were male, a proportion of just over 22%. This is indicative of those who are potentially active and the majority of these female directors appeared to be freelance and working in television rather than film.

Figure 4: Feature film directors, 2015, Directors UK



Source: EWA report database – Survey
Base: Directors UK

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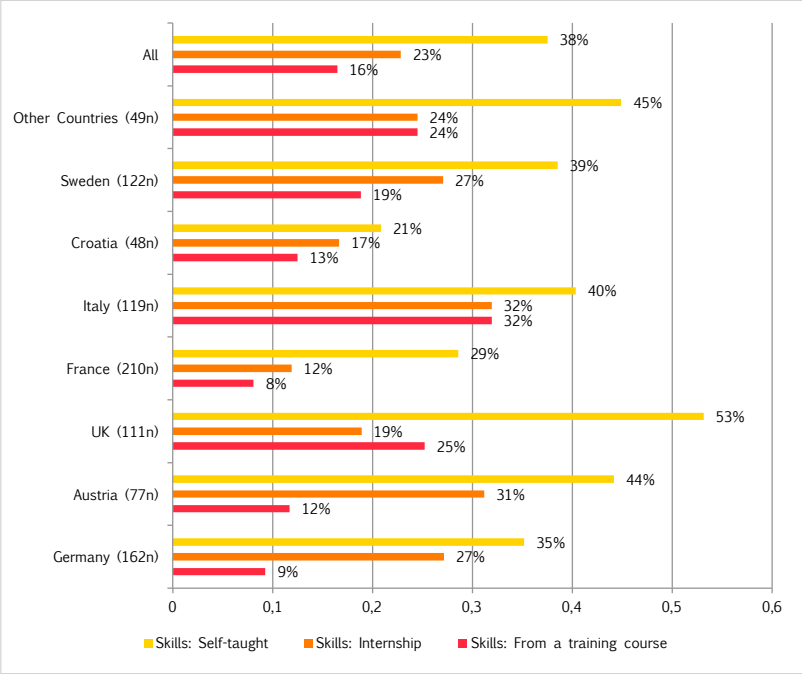
IV. Entry into the industry

4.1 How did you get your skills?

Of the 69 directors responding to the questionnaire 51% trained at film school, 41% had attended a training course and 29% had learned through apprenticeship or media schemes. Of those who had not been to film school 35% had attended training courses, 24% had had internships in the media industries and most indicated that they were self taught through practice. France's figures for qualifying through film school (60%) are also significantly higher than in UK and other countries.

Figure 5: How did you learn directing skills? (Not film school graduates)

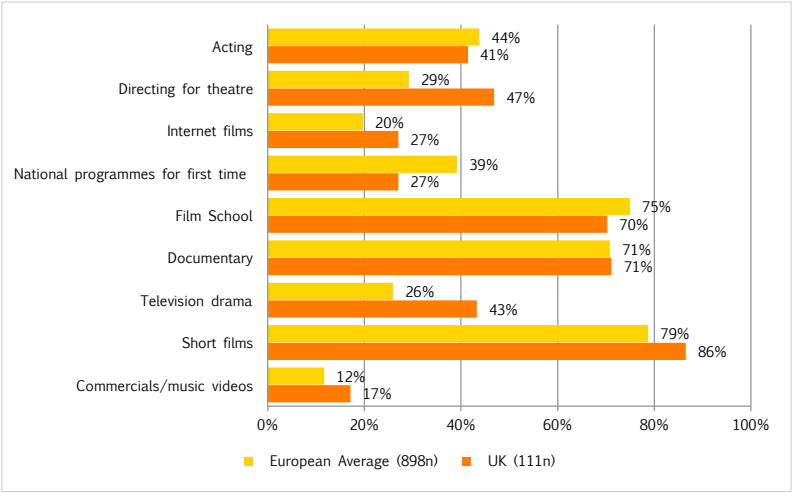


Source: EWA report database – Questionnaire
Note: n = number of respondents

4.2 Routes into the industry

Directors were asked which of a range of options are the best ways into the industry, and offered a yes/no option. Most respondents considered making shorts (87%) as the most important route with documentary film-making (78%) and film school (70%) in second and third place. In comparison to the other European countries there was also higher than average confidence in pathways through theatre (47%) and directing television drama (43%).

Figure 6: Routes into directing



Source: EWA report database – Questionnaire
Note: n = number of respondents

4.3 Comparative performance at film school

Figures were taken for applicants and students for all MA Directing courses at the National Film & Television School between 2006 – 13. The number of applicants is consistently far higher than places available for both men and women. Whereas women comprise on average 32.6% of the overall number of applicants they form 45% of the graduates, so the conversion rate from applicant to graduate is more favourable for women and has consistently remained so with the exception of one year, 2010.

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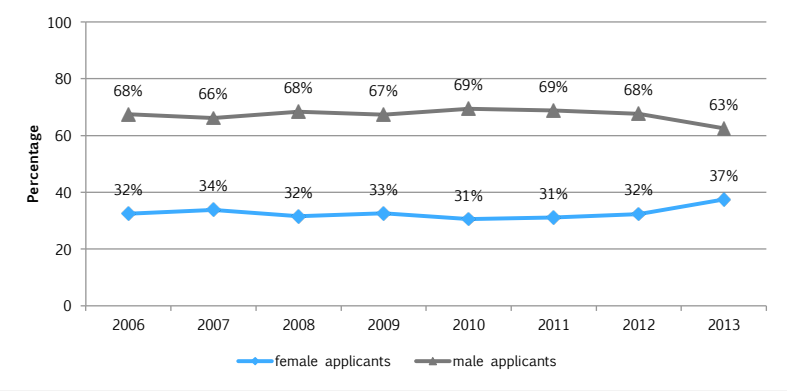
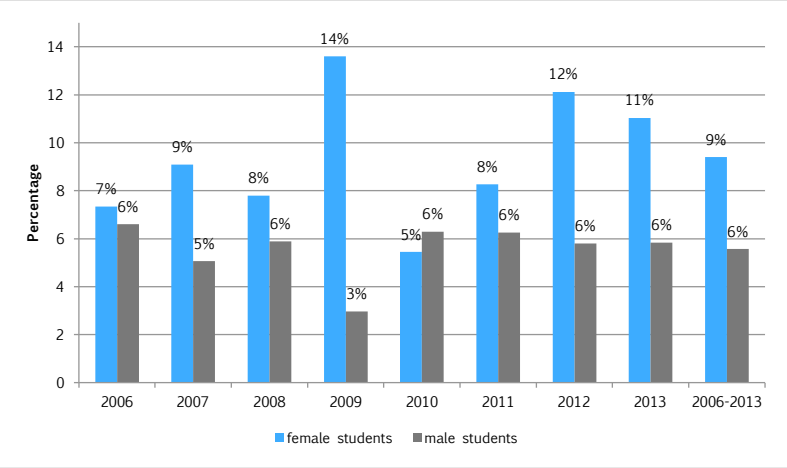
Figure 7: Applicants to National Film and Television School, NFTS



Source: EWA report database - Survey

Figure 8: Applicant: Graduate Ratios, National Film and Television School



Source: EWA report database - Survey

V. National Funding

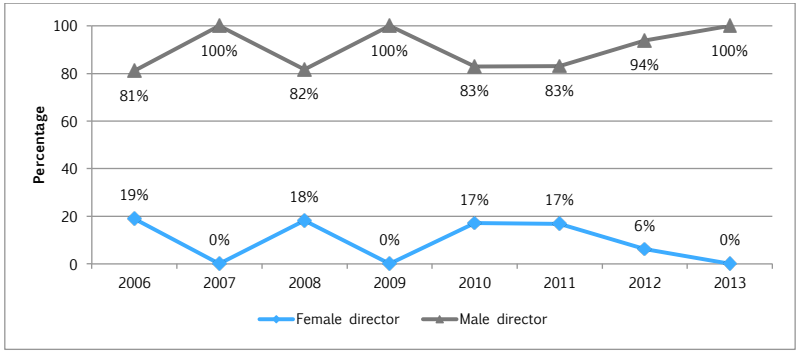
State funding for independent production is distributed primarily through the British Film Institute (BFI) but also through the agencies of the nations and regions. Given the difficulty of accessing comparative, gender-based statistics, this report has focused on the BFI lottery fund which is monitored by the BFI's Research and Statistics Unit. We were unable to access figures on applications to funds to monitor changes in gender ratios of applicants to awards

This section also provides a limited reference to overall regional funding and to two production funds targeted at first time directors in 5.6 below

5.1 BFI Lottery Production Fund – Fiction & Documentary

Between 2006 and 13 a total of 177 films have been supported by the BFI Lottery Fund. Of these 151 are fiction and 26 are documentary. Most of the money has been awarded to male directors, who have enjoyed an overall share of 88.6% over the period. There have been some large annual fluctuations

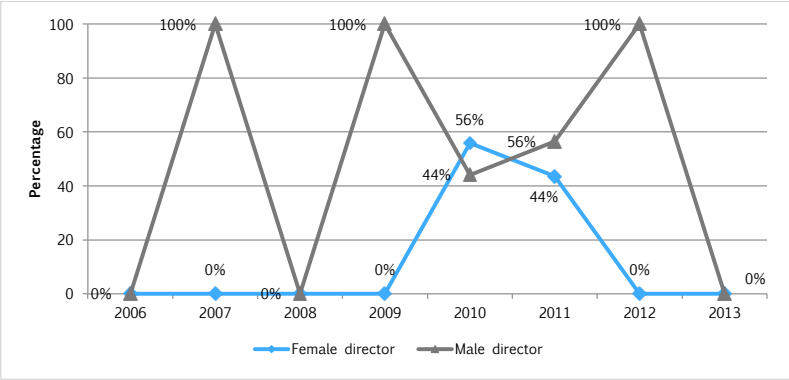
Figure 9a: BFI Lottery Production Fund: Fiction



Source: EWA report database – Survey
Note: Best available annual figures: 0% indicative of less than 5 productions

Female directors' share of fiction budgets averages at 11.3% and shows a decline.

Figure 9b: BFI lottery production fund: Documentaries



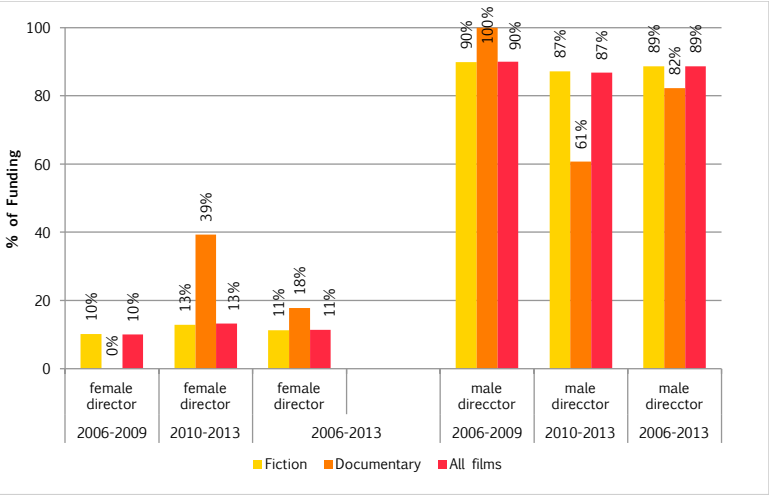
Source: EWA report database – Survey
Note: Best available annual figures: 0% indicative of less than 5 productions

Female directors' share of documentary budgets is higher at 17.8% although the numbers of films produced are small. Awards were only made in five of the eight years.

5.2 Progression of share of BFI lottery funding by film genre

There has been a slight increase in female director's share of lottery funding for fiction, from 10.1% to 12.8%. However, between the two periods there was a 21.6% reduction in funding for fiction. The more significant upward trend has been in documentaries where female directors' share increased from a minimal base to account for almost 40% of available funding. It should be noted however that the overall number of documentaries was low.

Figure 10: Progression of national lottery funding by film genre



Source: EWA report database - Survey
Note: Best available annual figures: 0% indicative of less than 5 productions

5.3 Average national fund spend per film by gender

In fiction, female directed films have received on average about 13% less funding than male-directed films. In documentary, female directed films have received about 17% more funding per film although the numbers of documentaries involved are minimal.

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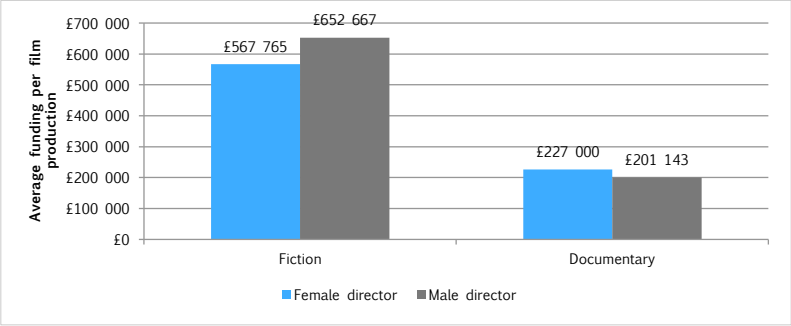
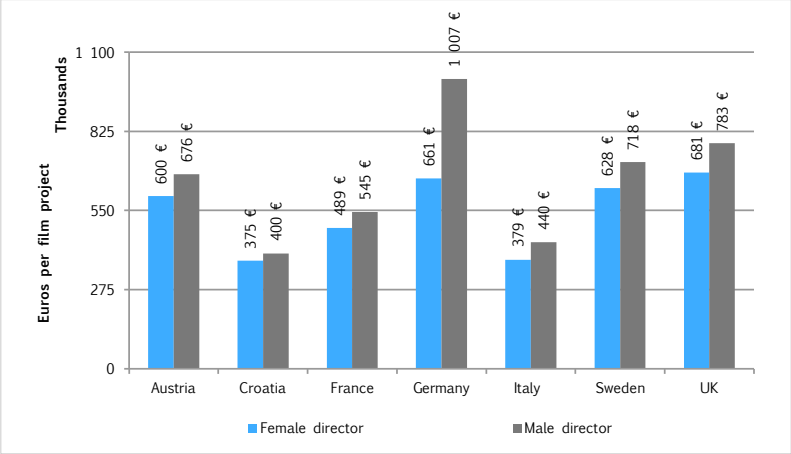
Figure 11: Average share of national fund spend: gender and genre (2006-2013)



Source: EWA report database - Survey

Figure 12: European average national fund spend per fiction film (euros)



Source: EWA report database - Survey
Note: Figures for Croatia are for 2008-2013; and for Austria and Germany 2009-2013

Average spend by the BFI lottery fund for female fiction is the highest in Europe. In all countries the spend is lower for female directors than for male directors. The differential ranges from 6% in Croatia to 34% in Germany. Even where the differential is smallest, it should be remembered that female directed films account

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for a far smaller proportion of overall national funding for fiction averaging at 16.1% of available funds.

5.4 Average budgets for films supported by BFI Lottery Fund

Film budgets for independent productions supported by the BFI lottery fund have ranged from about £440,000 (low) to about £6,600.000 (high) with the largest number of films in the highest budget category. The chart below tracks 135 films. For documentaries data is incomplete since numbers are low and information might be disclosive. Of the 109 fiction films, the figures show that male directors dominate in the high budget category (81.2%), and that female directors share is more proportionate in the low budget (35.3%) and medium budget (36.9%) category. They also show that of the 27.5 fiction films directed by women, the highest number (47.6%) were in the high budget category.

Figure 13: Budget Band for fiction and documentary films

	Number of Films			Budget		
Budget Band	**Low**	**Medium**	**High**	**Low**	**Medium**	**High**
Total	39	27	69			
Fiction - total	17	23	69	7,454,281	118,941,243	459,974,604
female director	6	8.5	13	2,924,766	14,441,112	78,162,556
female share (%)	35.29	36.96	18.84	39.24	12.14	16.99
male director	11	14.5	56	4,529,515	104,500,132	381,812,049
male share (%)	64.71	63.04	81.16	60.76	87.86	83.01
Documentaries - total	22	4	0	c	c	0

Source: EWA report Database – Survey
Base: British Film Institute
Note: c indicates numbers withheld

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5.5 Regional Funds

In 2006 under the UK Film Council there were 9 regional screen agencies functioning as independent companies in their own right. They all received national funds. This structure was abolished in 2010 and the BFI now distribute some film production funds between Creative England, Creative Scotland, Creative Wales and Northern Ireland Screen. Overall figures were available for 6 of the 8 years between 2006-2012 and indicate a total spend of £87,436,000, averaging about £14,500,000 per year, which is significant. However, there is no data published giving a gender or genre breakdown of how this money has been spent.

5.6 Targeted Development Funding

There have been several funding schemes targeted at first-time directors operating during the period. EWA analysed the figures for awards given by *Microwave*, run by Film London since 2008, and *iFeatures*, run by Creative England since 2010. Of eight films commissioned by *Microwave* only one is directed by a woman (12.5%). Out of seventeen films funded by iFeatures, four are directed by women (23.5%).

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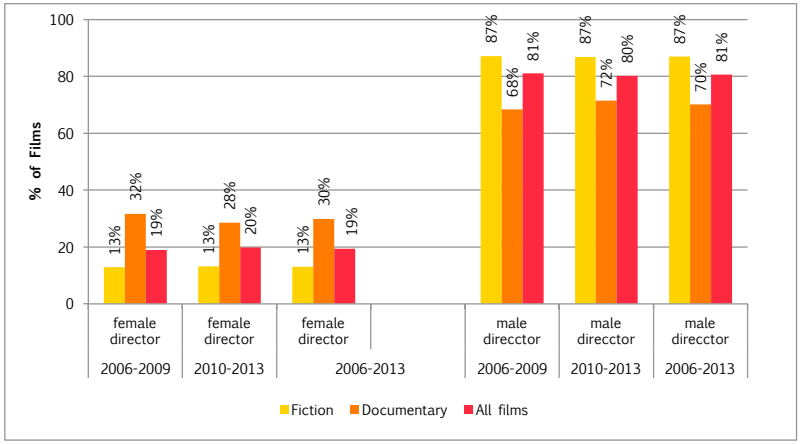
VI. Investment by broadcasters

Comprehensive data, giving a breakdown of gender and genre, is not currently available for this sector. EWA has used data from Directors UK's monitoring of the terrestrial broadcasters, public and commercial, all of whom have some obligation to public service provision. The BBC and Channel Four, still publicly owned, carry the most extensive service. These two channels both invest in film through their own companies, BBC Films and Film 4, and EWA has analysed their back catalogues for this section.

6.1 Public service broadcast funding: 60' Drama & Documentary

The following charts are based on data kept by Directors UK for the terrestrial broadcasters; BBC, ITV, Channel 4 and Channel 5. The statistics show that overall women's share has been 19.4% with a far stronger presence in documentary than in drama.

Figure 14a: Progression for television episodes of 60 minutes and over: by genre



Source: EWA report database – Survey

Across the two trend periods female directors' share of drama has increased fractionally whilst the share of documentary has dropped by just over 3%.

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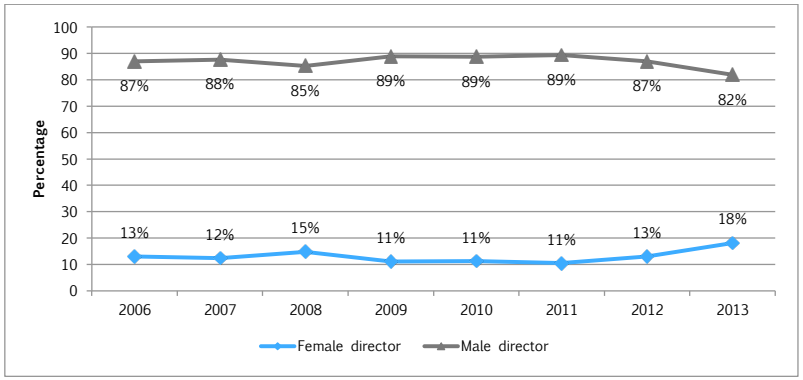
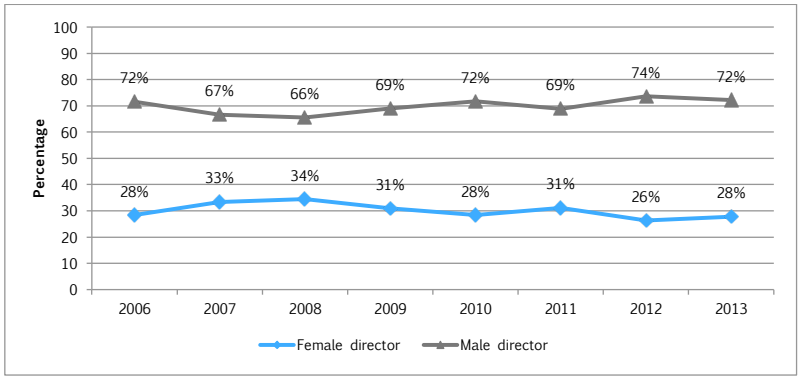
Figure 14b: Gender share of television drama 60 minutes and over



Source: EWA report database – Survey

In drama, female directors have accounted for approximately 13% of all episodes during the whole period, with their share dropping to a low in 2011 after which there has been a recovery, a rise of about 5% above the 2006 level though this still means that the share is only just above 18%.

Figure 14c: Gender share of documentaries 60 minutes and over



Source: EWA report database – Survey

In documentary, almost 30% of the episodes have been directed by women but in the past two years female directors' share has dropped below the 2006 figure.

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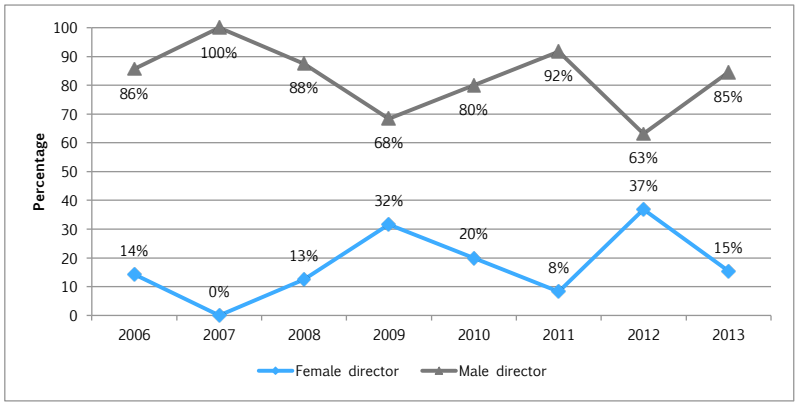
6.2 BBC Films

Over the period female directors have had a 20.4% share of productions. The highest years for production were 2009 and 2012 but the number of commissions has been very erratic with no sign of progression. For instance, after an encouraging recovery in 2012 where films by female directors represented a 36.8% share, the numbers fell back again.

Figure 15: Gender share of directors supported by BBC Films (2006-2013)



Source: EWA report database - Survey

6.3 Film 4

Female directors form 19.2% of those funded. There has been no increase in female directors either in numbers or in share of productions over the period. The highest number of films directed by women in any one year was in 1996 when there were 7 films supported. For men the highest has been 25 in 1988 and 2000.

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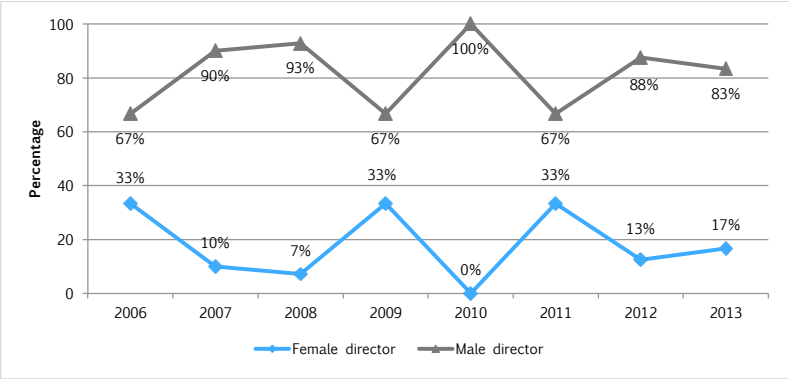
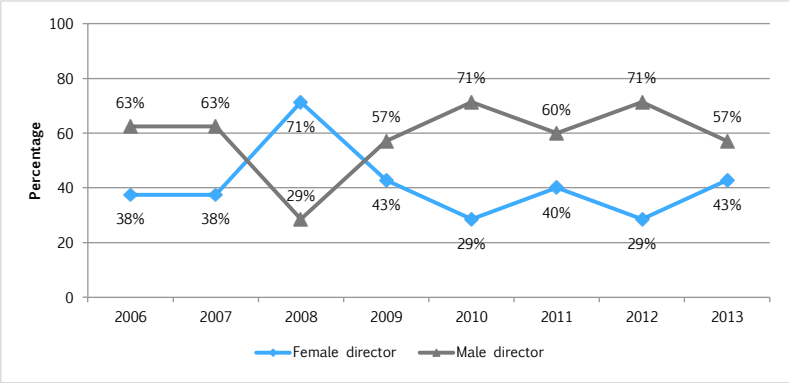
Figure 16: Gender share of directors supported by Film4



Source: EWA report database - Survey

Channel 4 also run a scheme called ***COMING UP***, (through 4talent) which offers new writers and directors the opportunity to make an original 30-40 minute film with a guaranteed network broadcast on Channel 4. The % share for women directors has been consistently high with women accounting for 41.1% of funded projects. Amongst those who have benefitted are Andrea Arnold, Lindy Heymann, Destiny Ekaragha, Tinge Krishnann and Hope Dickson Leach, who have all gone on to receive funding for first features.

Figure 17: Gender share, Channel 4's Coming Up



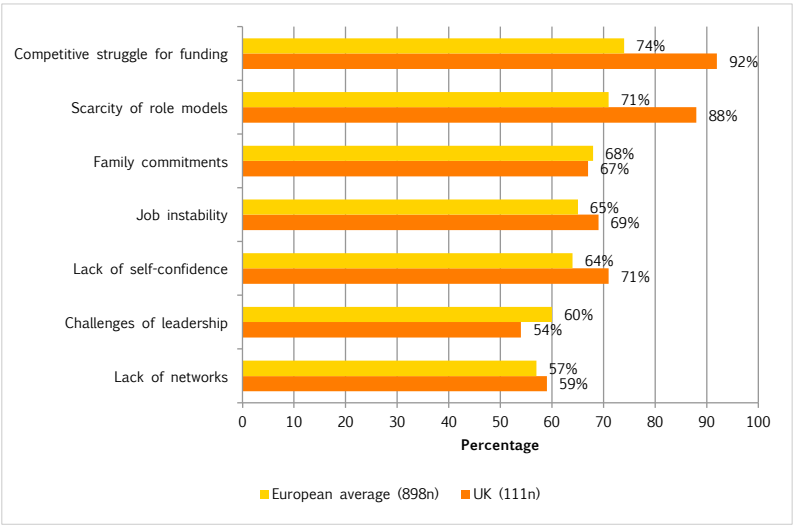
Source: EWA report database - Survey

VII. The challenges faced by female directors

7.1 What factors discourage women?

Respondents were given a number of options to consider and invited to make additional observations. Most UK respondents identify the Competitive Struggle to Secure Funding as the biggest challenge (92%) followed by Scarcity of Role Models (88%).

Figure 18: Comparative chart: Factors discouraging women



Source: EWA report database - Questionnaire

Interpretation of "the competitive struggle for funding" can be drawn from respondents' additional comments. Firstly, several refer to the wider context of discrimination in our society: this translates into false assumptions by commissioners that "men can do it better". Secondly, respondents refer to assumed norms of storytelling which exclude women through the stereotyping of main characters, and a "persistent bias around "universal" white male narratives".

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Additional Comments

"The main reason isn't even listed. Culturally producers and studio heads shy away from hiring women for deeply ingrained cultural reasons. False ideas of what makes a good leader. Basic assumption that men can do it better."

"I think the issue is that funders subconsciously have less confidence in women rather than that women do not have confidence in themselves"

"Sexism in the industry. Refusal to acknowledge female filmmakers' level of experience in favor of male directors of similar experience. Pulling up male directors from obscurity/short film circuit and ignoring women of comparable quality. Women are consistently seen as "risky" in a way men are not."

"Freelance directing is very hard to combine with engaging and funding regular childcare especially for work in the television industry."

"Being able to claim for Child Care as an expense as self employed or limited company is the single most important thing that could be done to help women directors."

"The strongest hindrance for female directors is the "norms" of storytelling we have; the strong ideas that the financiers share, no matter their genre, on which themes are "important" and which are not"

"Marginalisation - what kind of main characters are suitable for feature films? Whose story is worth telling? etc. Before we can break these stereotype norms, the reality will not change."

7.2 Does gender affect funders' decisions?

Two thirds of UK respondents, the highest in comparison to other national results, believe that private funders react negatively to projects directed by women. In the additional comments various reasons are suggested: that women are seen as "high risk" particularly for higher budget productions, and that there is a bias towards certain narratives such as action drama, and male-led story lines. The response is more positive regarding public funders where less than half, 39%, consider there is gender bias.

In each category a quarter of respondents recorded that they don't consider gender relevant in either case.

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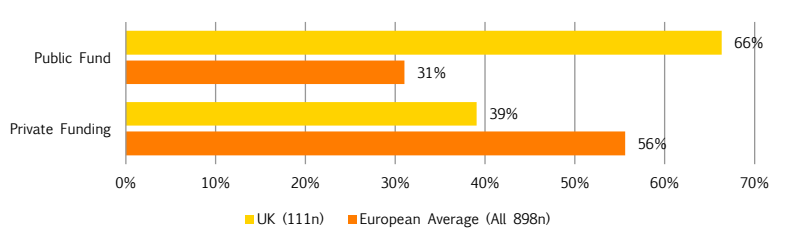
Figure 19: Comparative Chart: Impact of gender on funders' decisions



Source: EWA report database – Questionnaire
Note: n = number of respondents

7.3 What is the impact of being a parent?

42% of directors in the UK survey were parents, including 2 men, but less than a third of these, 32%, felt that being a parent had discouraged them from directing films. However, in comments given both on policy for change and factors discouraging female directors other perspectives emerge. Women feel disadvantaged by breaking their careers to start a family, both in the way they are regarded by commissioners and in their eligibility for development support. For instance, schemes intended to assist women's early careers do not take account that women are often older when applying. Several respondents also felt that all parents should be supported, especially during shoot periods, by making childcare a budget line.

Compared to the other European countries, figures in the UK were the third highest, after Austria and Sweden, for those who considered being a parent a discouraging factor

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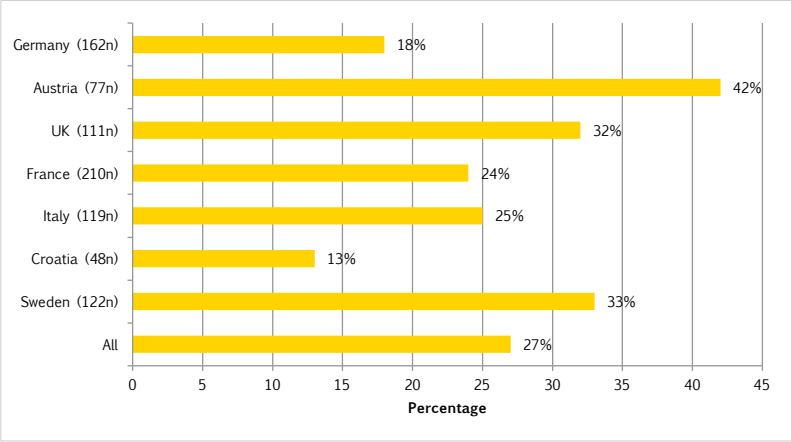
Figure 20: Comparative Chart: Does being parent discourage directors? Yes.



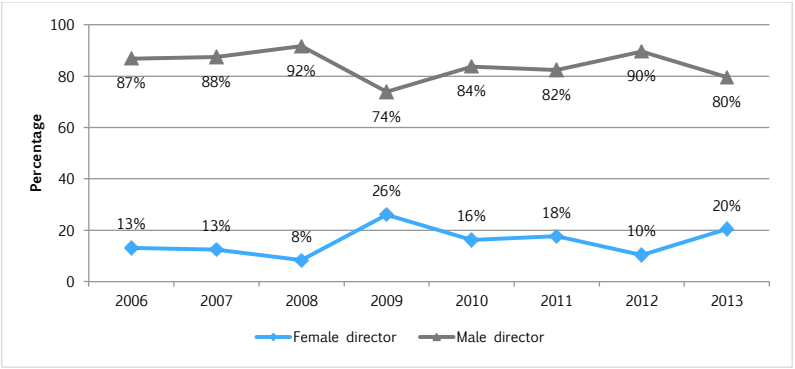
Source: EWA report database – Questionnaire
Note: n = number of respondents

VIII. Releases

8.1 BFI Lottery funded releases

Female directors overall share of releases is 16.2%, indicating an average of one in six films are directed by women. This is higher than the proportion for all independent releases. However, it is low for fiction and without the improved releases for documentary which have almost doubled in the period, from 8% to 22%, women's overall share would be in decline.

Figure 21: All lottery-funded film releases



Source: EWA report database - Survey

8.2 Progression of BFI lottery funded releases

Fiction releases have declined slightly over the period by 2.5% to a 14.7% share. The high point was 2009 with 5 films released in 2009. The average for documentary releases over the period is higher (18.4%) than that of fiction (15.9%) and it increased by 4.8%.

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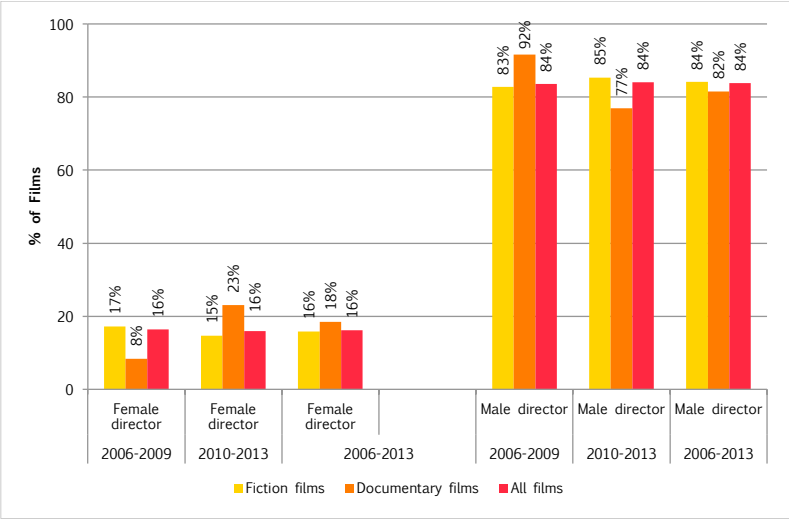
Figure 22: Progression of BFI lottery funded releases

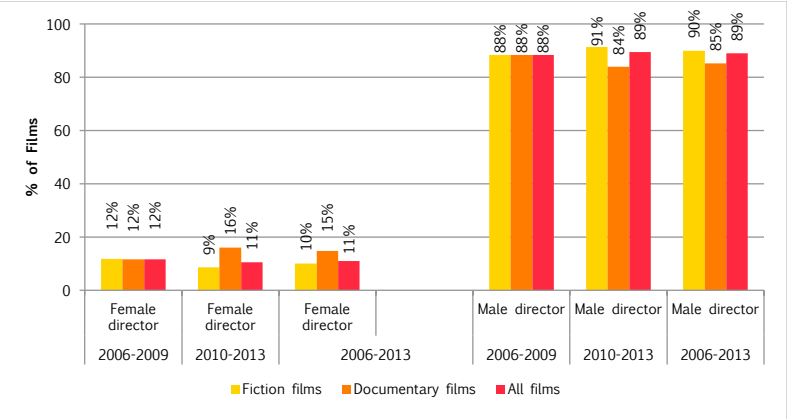


Source: EWA report database - Survey

8.3 Progression for all UK Independent releases – documentary and fiction

When BFI Lottery releases are taken together with all other UK Independent releases the female directors' overall share is only 11%, just over one in ten of films released. The progression is similar to that for Lottery Funded releases where an increase in the release of documentaries in the second period compensates for the decline in fiction to an 8.6% share. Though figures for documentary have improved at 16.1% in the second period, they remain below a quarter of the number directed by men.

Figure 23: Progression of other independent releases by film genre

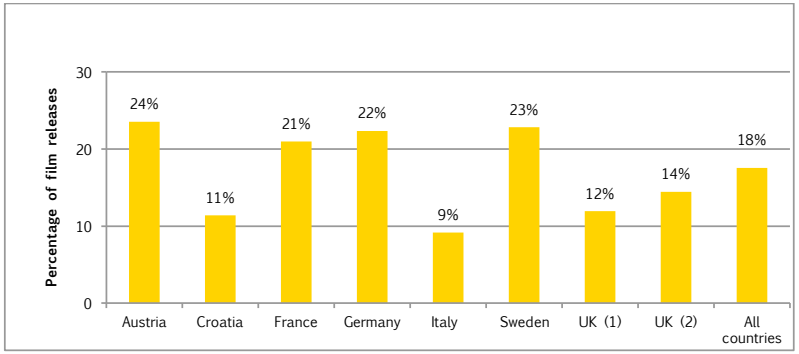


Source: EWA report database – Survey

8.4 Comparative chart: share of UK and European cinema releases

UK falls below the European average for female directors' releases along with Croatia and Italy. This chart also shows that female directors have a slightly greater proportion of releases of BFI Lottery funded films than of all independent releases.

Figure 24: Share of film releases with female directors (2006-2013)



Source: EWA report database – Survey
Note: UK(1) is all independent releases; UK(2) is BFI lottery funded releases

8.5 The perceived share of film releases in Europe for female directors

The majority of respondents, 89%, reckon correctly that films directed by women form less than 20% of all British films released. They were more realistic than the average for their European counterparts where only two thirds thought female-directed releases were this low. Respondents were not asked to distinguish between documentary or fiction films.

On the share of female directed films amongst all European films released, there was more confidence in the UK, although 67% still thought, correctly, that women's share would be less than 20%. This was almost in line with the European average of 64%. (According to the European Observatory Study between 2003 and 2012 the share of female directed films was 19.52%)

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IX. Awards and Critical Reception

Tracking critical reception in the press and media has been beyond the scope of this report but given the relative success of female directed films evidenced below, it is noted how rarely films by women are lead films either for broadsheet reviews or media review programmes.

9.1 Nominations and awards, 2013

EWA analysed the 116 films released in 2013 according to gender and the national and international nominations and awards which each film received. Of the 116 films 16% were directed by women and 84% by men. The results show that films directed by women were more likely to gain a nomination and/or award than those directed by men.

The gender differential for national awards is largest in the UK. Overall, according to the European average, a film with a female director will receive and/or be nominated for 2.3 awards (vs. 2.0 for male directors)[6].

[6] No data on festival nominations for UK

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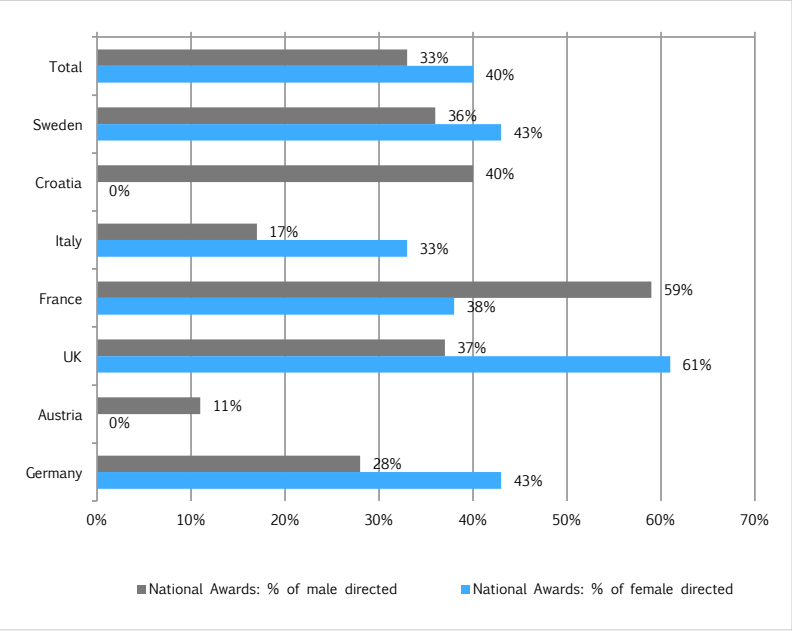
Figure 25a: Comparative Chart: National awards for all films released in 2013



Source: EWA report database – Festivals and awards

Notes:

1. The percentage refers to the total of all films either directed by men or women.
2. No data on festival nominations for UK
3. No data on national festivals for Austria
4. Croatian sample extended to 2010-13

Overall, results show that films by female directors win proportionately more international awards and are shown at international festivals with more success than those by male directors. Of the seven countries, female directors in the UK enjoy the highest proportion of awards in comparison with male directors.

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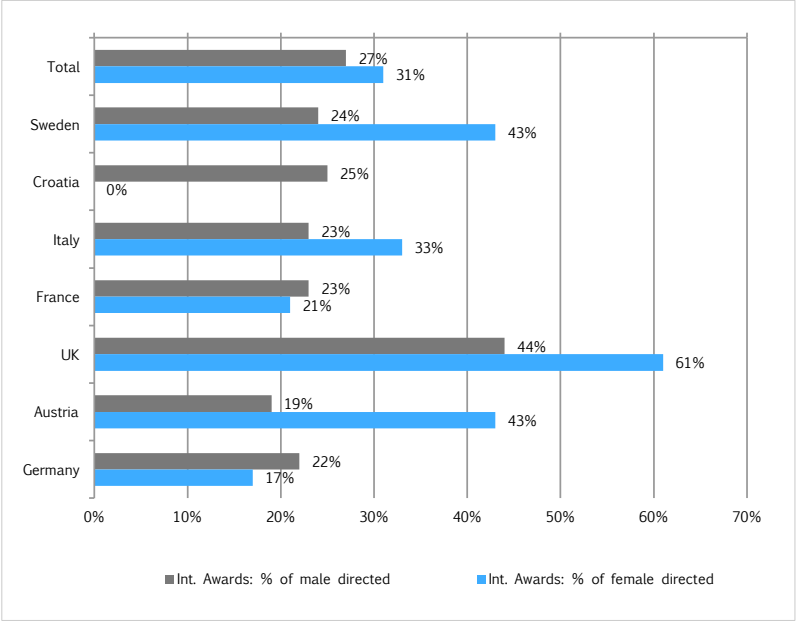
Figure 25b: Comparative Chart: International awards for all films released in 2013



Source: EWA report database – Festivals and awards

Notes:

1. The percentage refers to the total of all films either directed by men or women.
2. No data on festivals from the UK
3. No data on national festivals for Austria
4. Croatian sample extended to 2010-13

9.2 Festival A list awards, 2009-13

Between the years 2009 and 2013 four films directed by women won five A list festival awards, namely *FishTank*, Andrea Arnold; *Wasteland*, Lucy Walker*; My Brother the Devil*, Sally El Hosaini; and *The Selfish Giant*, Clio Barnard.

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X. Admissions

The BFI Unit of Research and Statistics does not keep admissions figures. Instead the share of the box office for each year is divided by an agreed average ticket price to arrive at figures which can be compared with other European countries. Although we have taken 4 year periods to monitor trends the success of outlier films in particular years can still distort figures.

10.1 Progression of admissions for BFI lottery funded films by genre

The share of box office admissions for lottery funded films with a female director has varied considerably from year to year in both genres, but has remained comparative with levels of production averaging 12.2% over the period. There has been significant progression for female directors across the two periods. Fiction films have increased their overall share of admissions by over 50% from a 6.7% share to a 15% share. This is slightly above their share of releases for the equivalent period (14.7%) and above their share of production funds (12.8%). Documentaries have increased their overall share significantly from 2.9% to 16.3%. However this is significantly lower than their share of releases (39.3%) and their share of production funding (39.3%). However, there are many contexts affecting the route to market which need further investigation, and it is universally agreed by respondents to the questionnaire that far more measures should be taken to ensure female directed films reach their audience.

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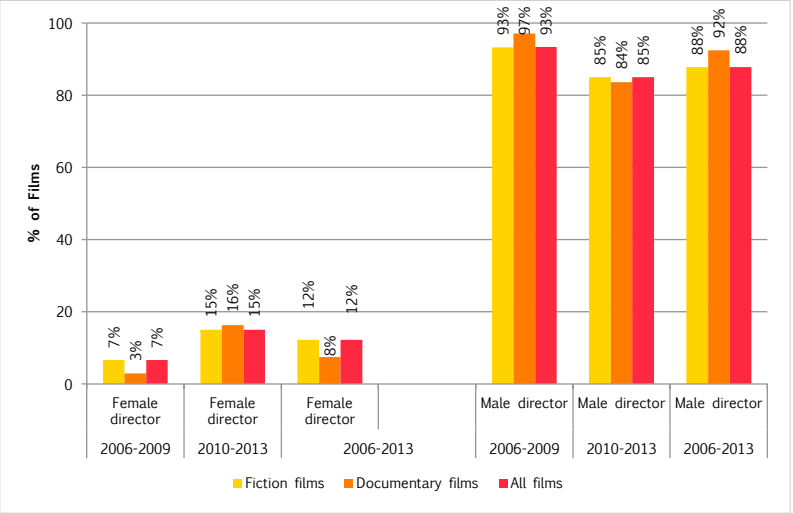
Figure 26: Progression of box office admissions to BFI lottery funded releases by genre



Source: EWA report database - Survey

10.2 Progression for average box office admissions per lottery funded film

When the number of admissions per film is calculated, the average for female-directed fiction increases from 80,000 to 350,000 in the second period just exceeding the number per film for male-directed fiction. For documentary with small production numbers for both male and female directors, the audience numbers decline slightly, though not as much as for the male-directed films.

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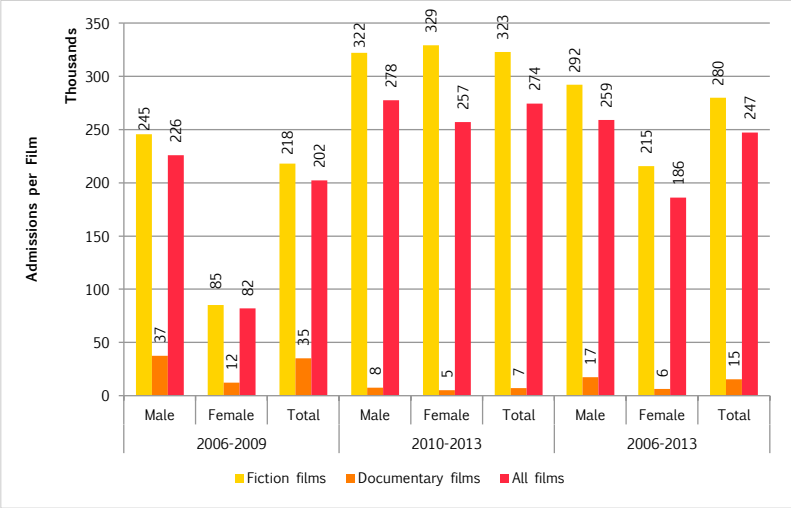
Figure 27: Progression of average box-office admissions per lottery-funded release by film genre

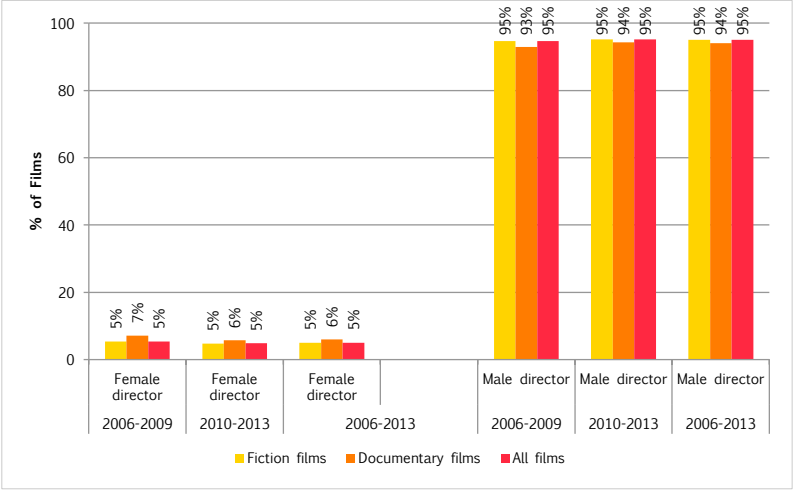


Source: EWA report database - Survey

10.3 Progression of admissions share for all independent films

Overall female directors' share of admissions for all independent films (5%) is lower than that for BFI lottery funded productions (12.2%). There is little progression over the two periods, with 2010-13 showing a slight decline for both fiction (.5%) and documentary (1.5%) directed by women.

Figure 28: Progression of box-office admissions per independent release by film genre



Source: EWA report database - Survey

10.4 Progression for average box office admissions per independent film

Female directors' admissions share per independent fiction film increases between the two time periods. This is similar to BFI lottery funded films though the maximum audience figure for independent releases is significantly lower at 68,400. Admissions for documentary stay more or less the same. Over the full period admissions for female directed fiction remain about 50% of the figure for male directed fiction and about a third of the figure for male directed documentary.

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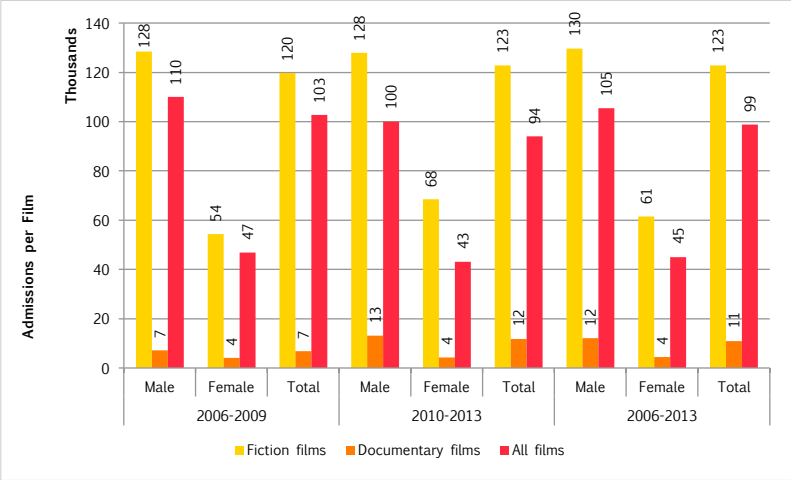
Figure 29: Progression of average box-office admissions per independent release by film genre



Source: EWA report database - Survey

10.5 Share of top 20 UK Independent Films

Female directed films averaged 5.3% of the most successful UK independent films over the full period. 2012 was a particularly successful year with a 14.3% share of box office. The successful films were directed by 6 directors: Diane English, Max Giwa, Catherine Hardwicke, Debbie Issit, Phyllida Lloyd and Lynn Ramsey. Max Giwa and Debbie Issit both had two films which entered the top 20.

10.6 What affects box-office performance?

Respondents were asked to consider a range of factors in relation to achieving success with the audience. UK respondents were most convinced by the importance of publicity and advertising (94%) and effective distribution strategy (90%). This was also raised in several of the additional observations. More UK respondents also recognise the impact of critical reviews (87%) than their European counterparts.

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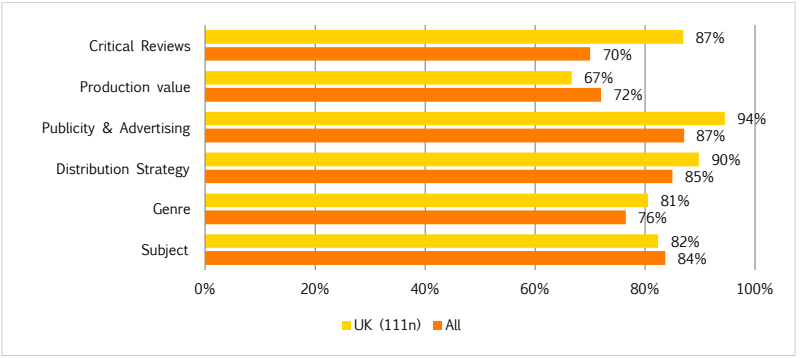
Figure 30 Comparative chart: what affects box-office performance?



Source: EWA report database – Questionnaire
Note: n = number of respondents

Other Comments

Several respondents felt there was a mismatch between the films women wish to direct and what is popularly conceived as a "commercial" or a "box-office serving film". They also felt that female directors do not gain the experience to direct this type of film. Another factor mentioned several times was the importance given to having lead male actors whatever the intrinsic nature of the script.

"Having just worked with 8 female writer-directors they tell personal stories which may be a challenge to get financed as they will be seen as not commercial and if they do make them they struggle to find distribution."

"We need to encourage female directors who are in the commercial world to tell commercial stories. Whether the film is 'good' or not is key, but women aren't given as much opportunity to direct box-office serving films."

"Niche distribution is THE WORST: summer releases, for instance during sports tournaments; poorly-edited trailers that undersell films;

lack of coverage based on persistent perception that only male auteurs sell papers/magazines"

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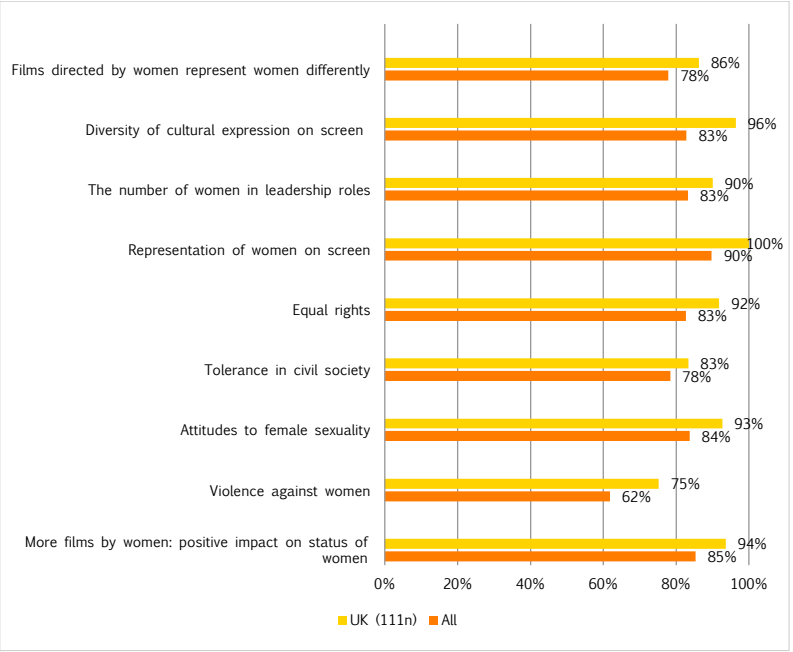
10.7 How does gender affect the choice of film?

Under a third of UK respondents considered this to be significant. However, 68% recognised that the gender of the director would affect the way a story is told. This was a similar response to other European respondents although a larger proportion, almost 75%, felt that gender affects a film's treatment.

XI. The social impact of more films directed by women

Respondents were asked to consider a range of issues in society which might be affected were more films directed by women. All felt that this would change the way women are represented, and almost all felt that it would achieve greater diversity of representation on our screens (96%). There was also almost universal agreement that this would raise the status of women in society (94%). In general the UK response was slightly more affirmative than the average European response in all cases. Respondents in all countries also felt less convinced that more films in circulation would in itself affect the level of violence against women.

Figure 31: How would more women's films impact on current social issues?



Source: EWA report database – Questionnaire
Note: n = number of respondents

XII. Changing the Picture – Policies for Change

12.1 Existing measures for gender equality in the industry

There is great disparity in the statistics kept on gender equality, and many institutions do not keep databases with this information. Even where the data exists it is not being monitored either to measure progression or to inform policy. There is some evidence of change in recent years but little evidence of a co-ordinated approach across institutions. In some cases gender equality is being subsumed within wider diversity agendas and sufficient measures are not being taken to address the scale of the gender discrimination.

In the BFI's statistical yearbook, since 2007, there is some evidence that gender equality is being tracked, particularly in the sections on talent and directing. However this is patchy and anecdotal.

In the regions, prior to 2010 the regional screen agencies were evolving a combined approach but this ended when they were abolished in 2010. The agencies now active in the regions and nations have various initiatives. Some, such as Creative England, have a generic Diversity and Equality Policy for both clients and employees. Others stated that gender is part of the "cross cutting theme of equality". In recent years there are some statistics appearing in annual reports but they do not address the full range of activity which needs to be monitored.

In the broadcasting sector, which plays a key role in sustaining female directors' careers, there has been no data available. Instead EWA has relied on data collected by Directors UK. The launch of *Project Diamond*, Creative Diversity Network's diversity monitoring scheme is a welcome initiative whose effectiveness can be assessed once the range of its data is made available this year.

12.2 Preparing the ground in school education.

From the demographics given in EWA's questionnaire only 13% of directors said they had decided on their career before the age of 11, and almost all had made their first film after the age of 11.

90% felt that it was important to focus on film education and media literacy in order to orient girls towards becoming female directors and 86% felt there should be more films as source material in the curriculum. There was also widespread

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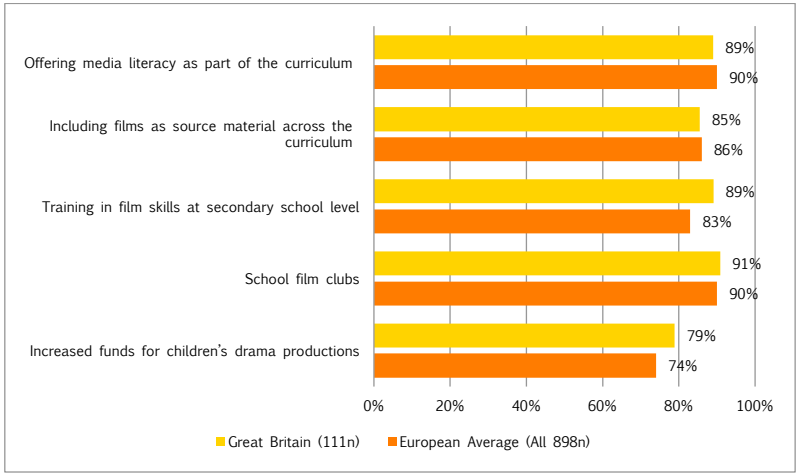
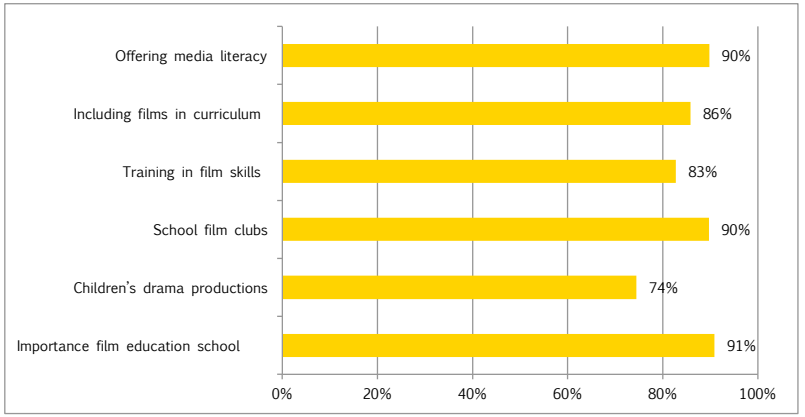
support for film clubs to inspire girls to take up directing. On the importance of school education the UK respondents largely echoed their European counterparts.

Figure 32: Comparative Chart: Measures to be taken in schools



Source: EWA report database - Questionnaire
Notes: Percentage basis: UK 111 = 100%; European average 898 = 100%

Figure 33: Importance of film education



Source: EWA report database - Questionnaire

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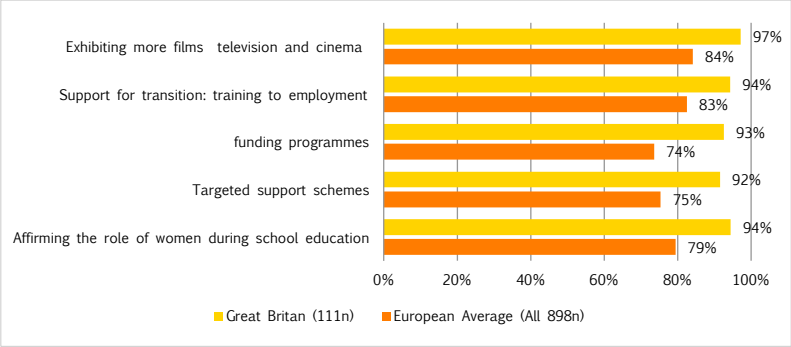
12.3 Measures to encourage potential women directors

Several measures were presented to respondents. UK's response was notably more affirmative in each case than the response in other European countries. Exhibiting more films directed by women had nearly universal support (97%) indicative that measures to incentivise greater circulation should be taken. There was also high support, over 90%, for measures to affirm women's presence at every stage of their early careers – in education, in their transition from training into their careers, and in developing more film projects - were all very strongly affirmed.

Figure 34: Measures to encourage women directors into the industry



Source: EWA report database - Questionnaire
Notes: Percentage basis: UK 111 = 100%; European average 898 = 100%

12.4 Policies to sustain female directors' careers

Support for policies for change was higher in the UK across all options than in other European countries including support for targets (quotas) to be set to transform the current situation. Only in Sweden do these already exist, part of a coordinated 5 year action plan which is delivering positive results.

Support for making the 1st and 2nd films and targeted production funds for women were considered the most important measures, together with achieving gender equality on commissioning panels and putting targets on development funds.

There were also many additional suggestions, several of which focused on the need to take into account the particular demands of parenting and the distinctive progression of women's careers.

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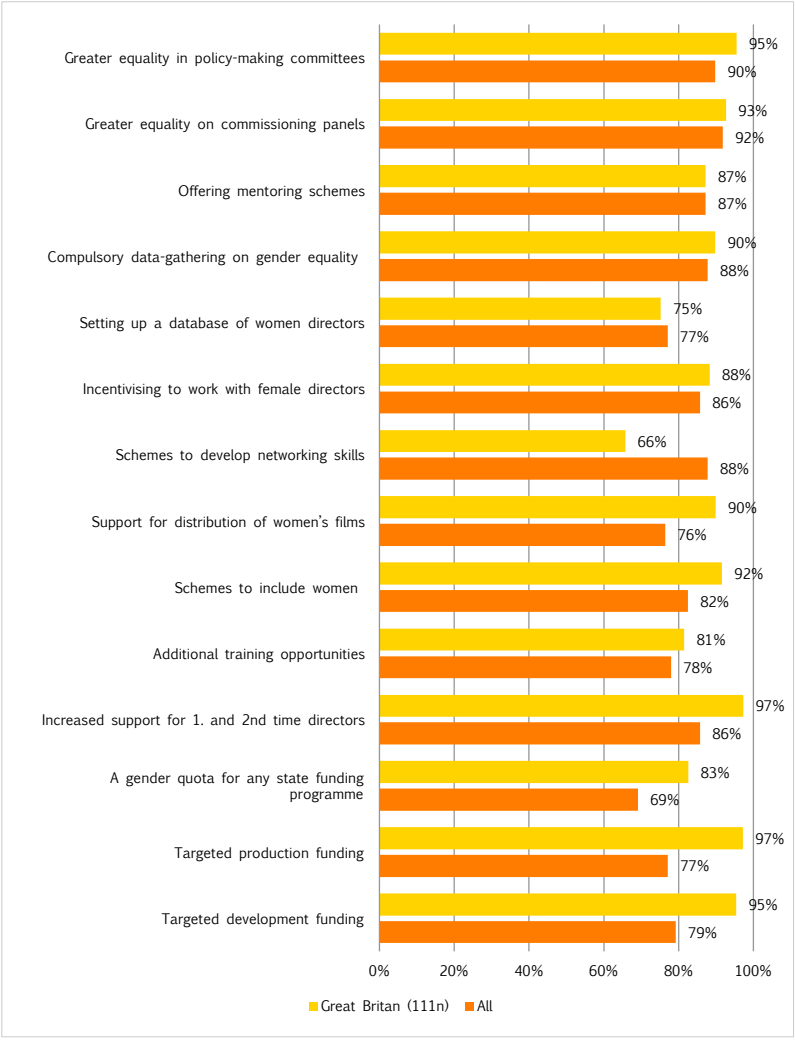
Figure 35: Policy measures to sustain female directors' careers?



Source: EWA report database - Questionnaire
Notes: Percentage basis: UK 111 = 100%; European average 898 = 100%

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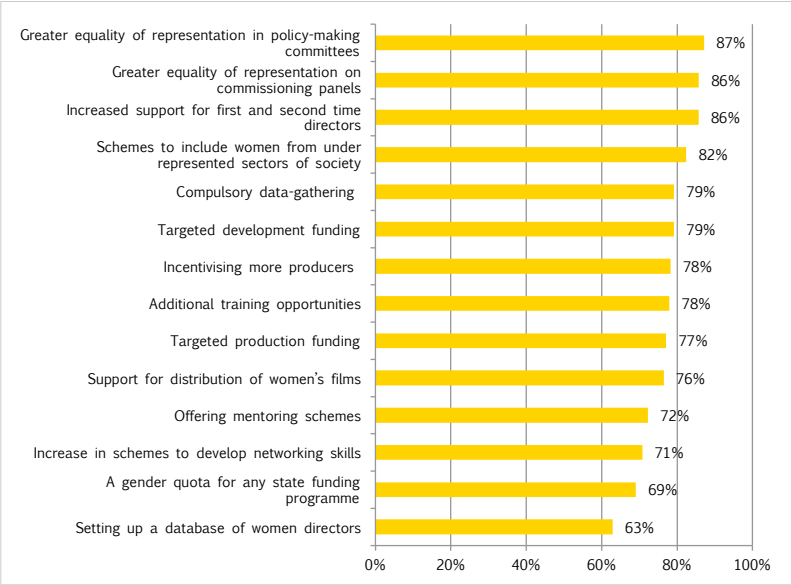
Figure 36: Policy measures



Source: EWA report database - Questionnaire

Other comments

"The problem isn't lack of desire or lack of female directors (don't put it on them). It's producers/funders lack of desire to hire the myriad of female directors already out there. In my film school graduating class women were 60%. Most of them can't get work."

"It needs to be illegal to have an entire series of a TV show, directed by multiple directors and not to include women. It needs to be illegal for a film production company to have an entire slate of films for several years and to have no female directors (or people of colour) on that slate as directors."

"Many first and second time director schemes have age limits and for many women the journey to become a director takes a longer time than for men and also family hinders many. So more possibilities are needed for women over 35. New talent programmes should focus on interesting new voices, not on age."

"I don't think there should be targeted funding or schemes, which are women only. I think ALL schemes should make a concerted effort to ensure the outcome of the scheme benefits 50% female and 50% male participants across the board (reflective of society)"

"We need to encourage hiring women directors for genre/big budget entertainment."

"It is ridiculous that I could claim for a chauffeur, make-up artist, masseuse or PA but I cannot claim my child care as a business expense."

"Being able to claim for child care as an expense as a self employed person or a limited company is the single most important thing that could be done to help women directors"

"It's time to educate financiers and other gate keepers on diversity issues and to help them understand their own prejudice."

"Executives, producers and people in positions of power need educating. Change the grammar and achieve ways to employ more female directors."

"We need to increase critical and marketing support for films by women: certainly subjects deemed more 'feminine' (e.g. domestic drama) are harder to finance."

"Why is film so far behind in gender equality? Is it the levels of finance involved? The way women are viewed in many films is still sexist and demeaning. I have been 30 years in the business. It's time to wake up!"

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