

Facts and figures 2023

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In brief

Part 1: General consumer trends

- › Continued decrease in film viewing, especially among older segments
- › The shift to streaming services has not benefited feature films
- › Audiences expect new movies to be available online
- › Swedish films account for a relatively high share of total film viewing
- › The cinema accounts for 40 percent of Swedes' film spending, but only four percent of viewing.

Part 2: The cinema market

- › Weaker recovery in Sweden compared to the rest of Europe
- › Low cinema attendance in older audience groups inhibits growth
- › Young people most frequent cinema-goers and less positive about Swedish films
- › Admissions for Swedish films remain at a low level
- › Discrepancy between supply and demand in cinemas
- › Record number of Swedish film releases

Part 3: Film production

- › Lower investments but more fiction feature films outside the support system
- › The majority of feature films with a theatrical release have funding from the Swedish Film Institute
- › TV's share of financing has decreased over the years for both feature films and documentaries
- › Sweden has the lowest state funding of film in the Nordics.

Part 4: Gender Equality

- › Even gender distribution in key roles for feature fiction and documentary films in 2023
- › Women under-represented in feature fiction films with high budgets.

Key Figures 2023



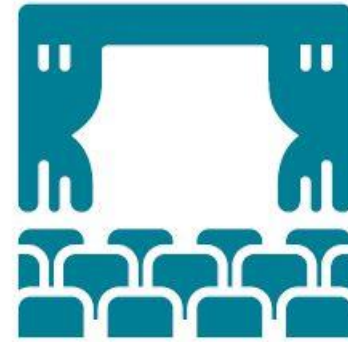
75

Swedish feature-length releases, of which 59 had a theatrical release



17%

Market share of Swedish film at cinemas



329

Total number of feature-length theatrical releases



64%

Share of total film viewing for VOD



26,2

Average budget of feature-length fiction films with production funding, million SEK



47%

Share of films with production funding that were directed by a woman

GLOSSARY

VOD

Video on demand; digital video distributed at the viewer's request.

SVOD

Subscription-based video on demand.

TV

Traditional linear television broadcasts.

TVOD

Transactional video on demand; content offered on a pay-per-view basis, either to rent or to buy.

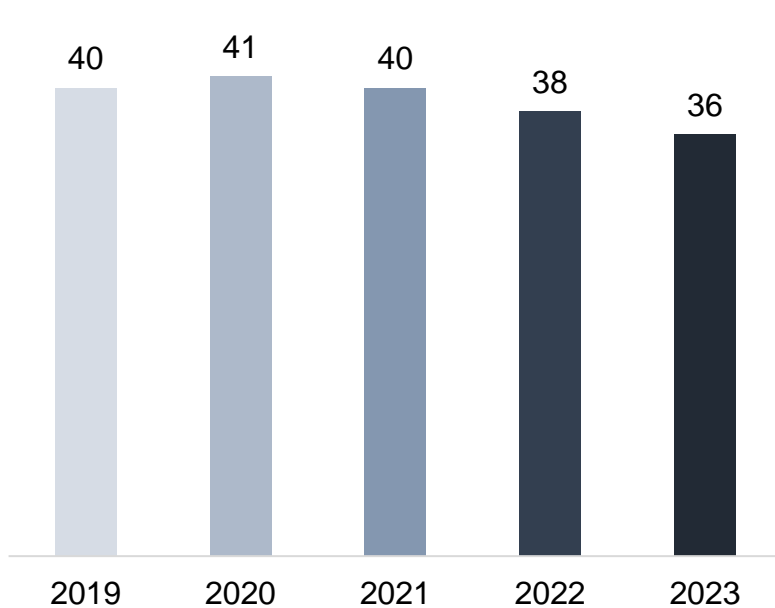
AVOD/FVOD

Advertising-based/free video on demand.

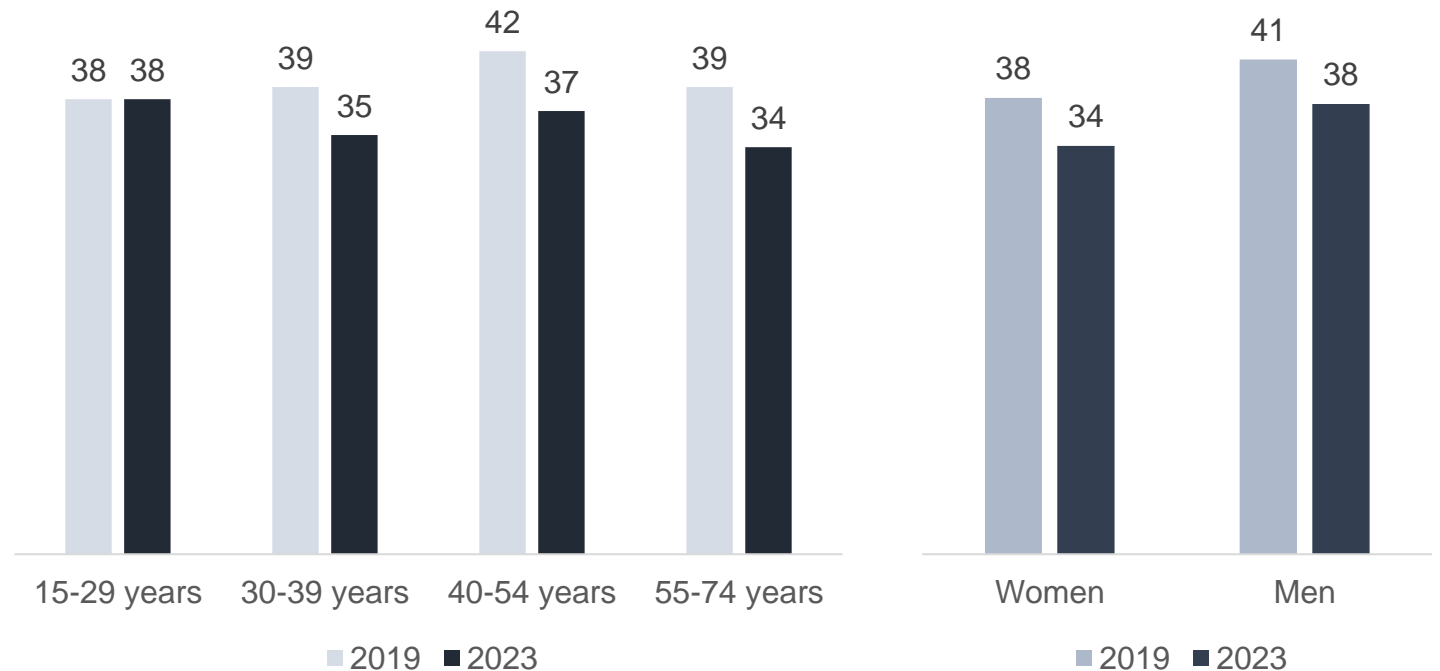
**Continued decrease in film viewing –
The shift to streaming services has not
benefited feature films**

Continued decrease in film viewing in Sweden, except among young people

Total film viewing in Sweden (number of films per person) 2019–2023

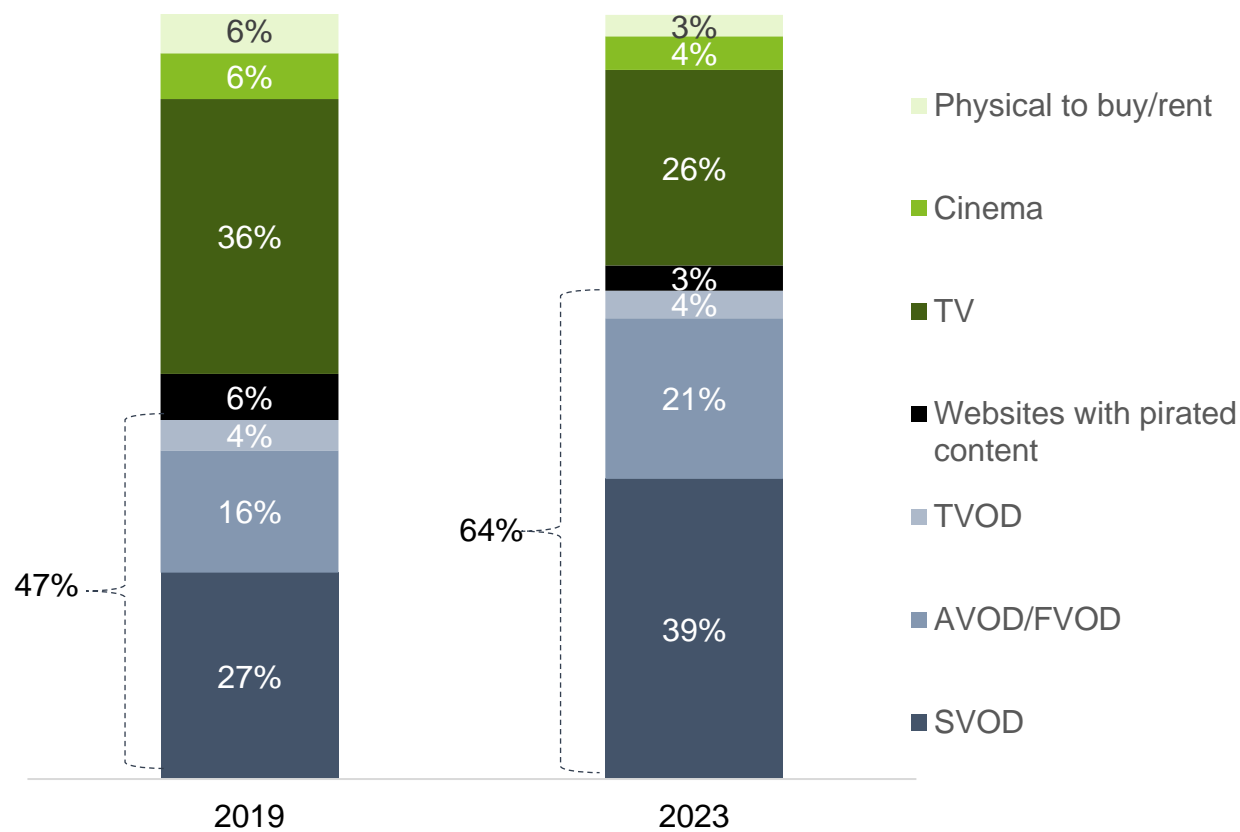


Number of feature films watched per person and year



An increased share of film viewing takes place on VOD

Total film viewing in Sweden per channel 2019 and 2023

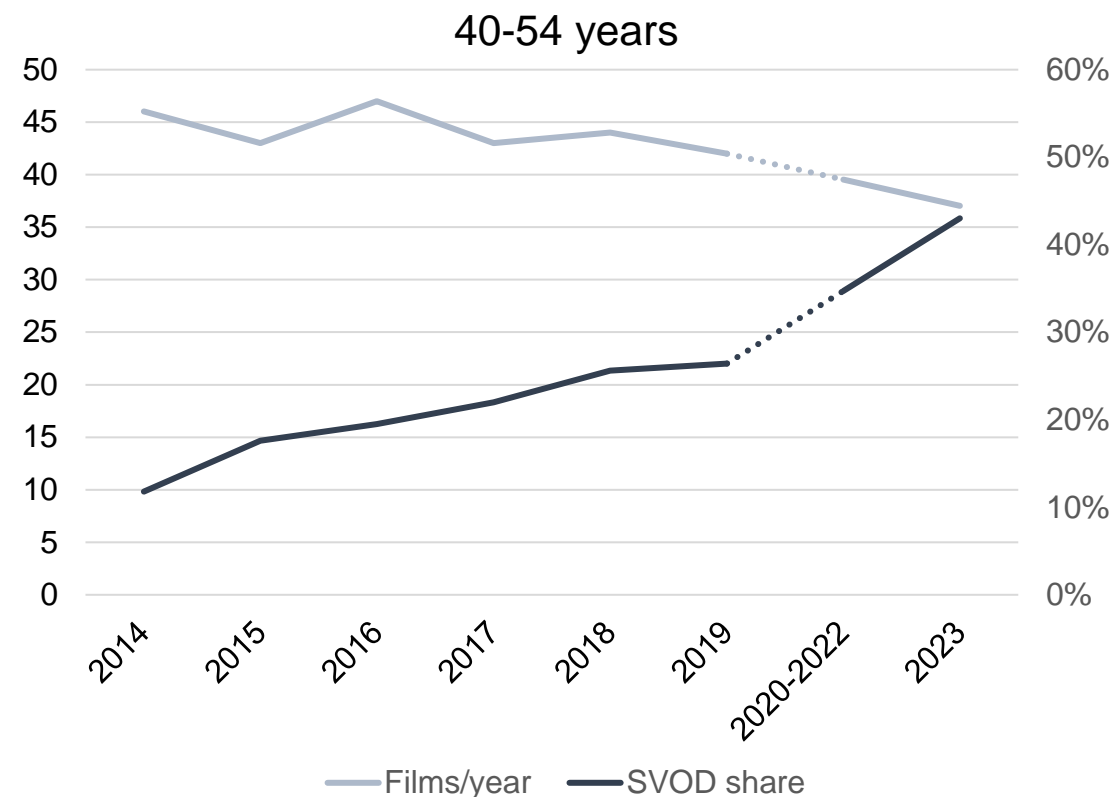
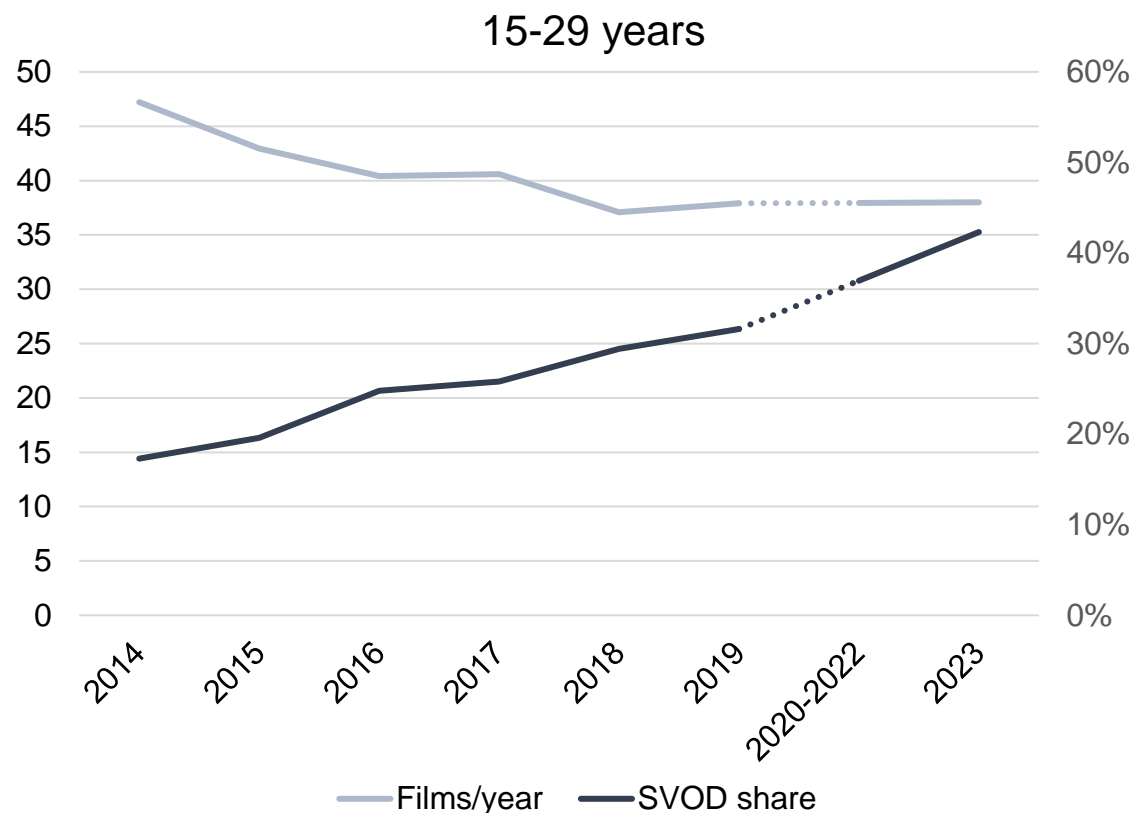


Film viewing in Sweden continued to decrease in 2023. The decrease compared to 2019 has occurred within all age groups over 30, and among both women and men. The share of film viewing on digital services continues to increase, at the expense of primarily linear TV viewing. In total, digital services (excluding pirated services) accounted for 64% of all movie viewing in 2023. This can be compared to 47% in 2019.

Looking at the last five years, the change is greatest among older audience groups. For young people, the transition to streaming services happened earlier.

Decreased film viewing coincides with SVOD increase

Total film viewing compared to share of viewing on SVOD 2014-2023*

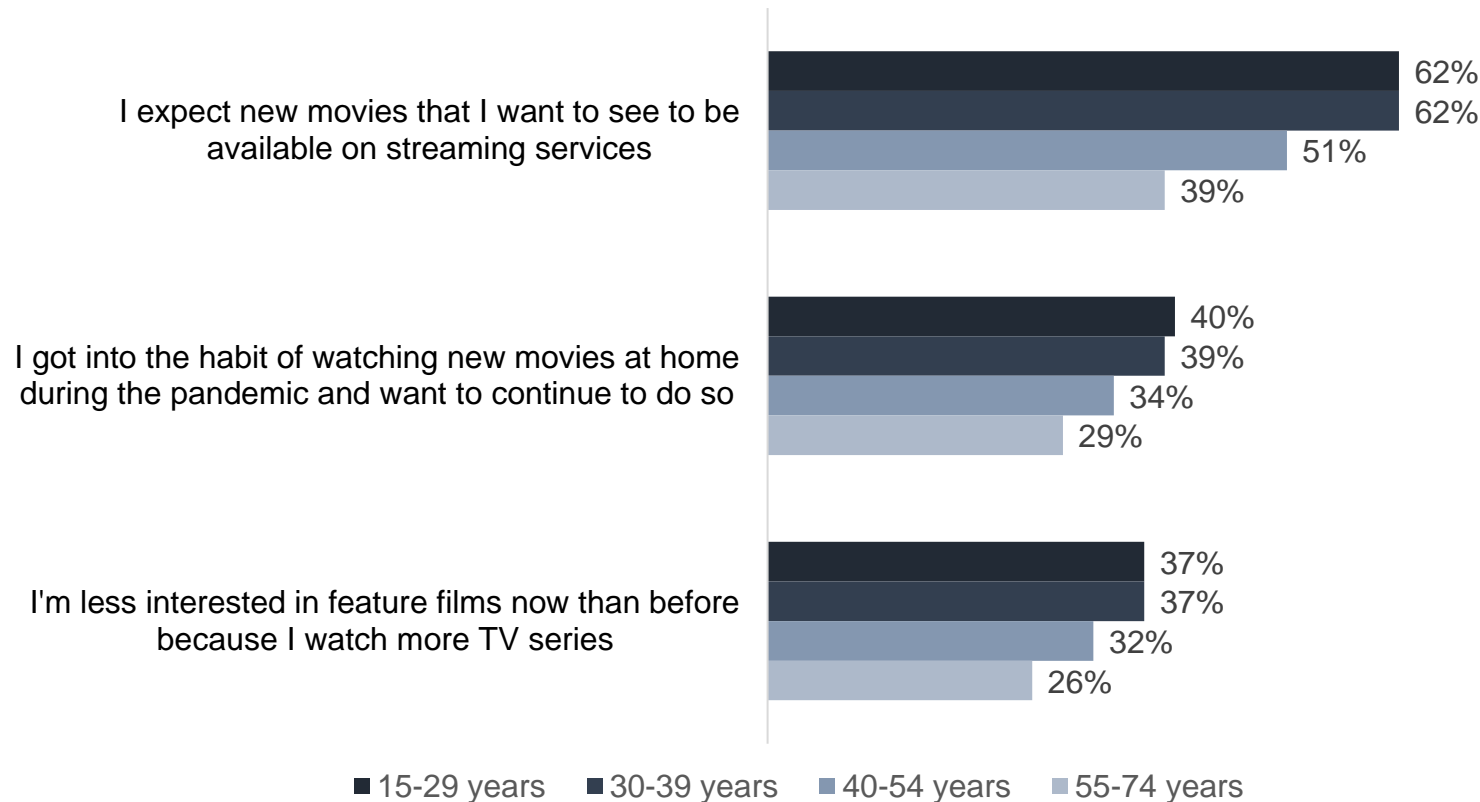


*Data for these age groups is missing for 2020-2022.

The Swedish Film Institute's audience surveys 2014-2023

The Swedish audience expects new films to be available online

Percentage of the audience who agree with the following statements

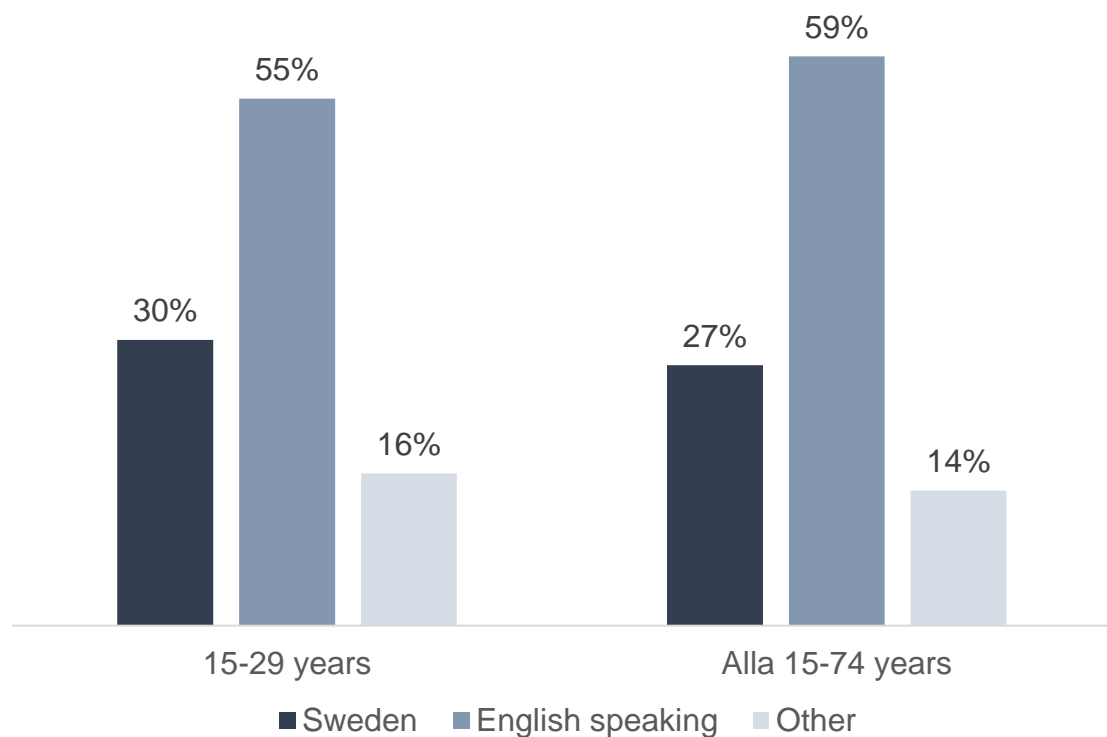


A possible explanation for the decreased film viewing is that the feature film has a harder time competing with other content online compared to how it was when film viewing to a greater extent took place on linear TV.

The expectation of being able to watch new films online is high, especially among younger audience groups who were also the first to switch to streaming. At the same time, the average time from a film's theatrical release to its digital release was significantly longer in Sweden than in the US in 2023 – 91 days compared to 37 days.

Swedish films account for a relatively high share of viewing

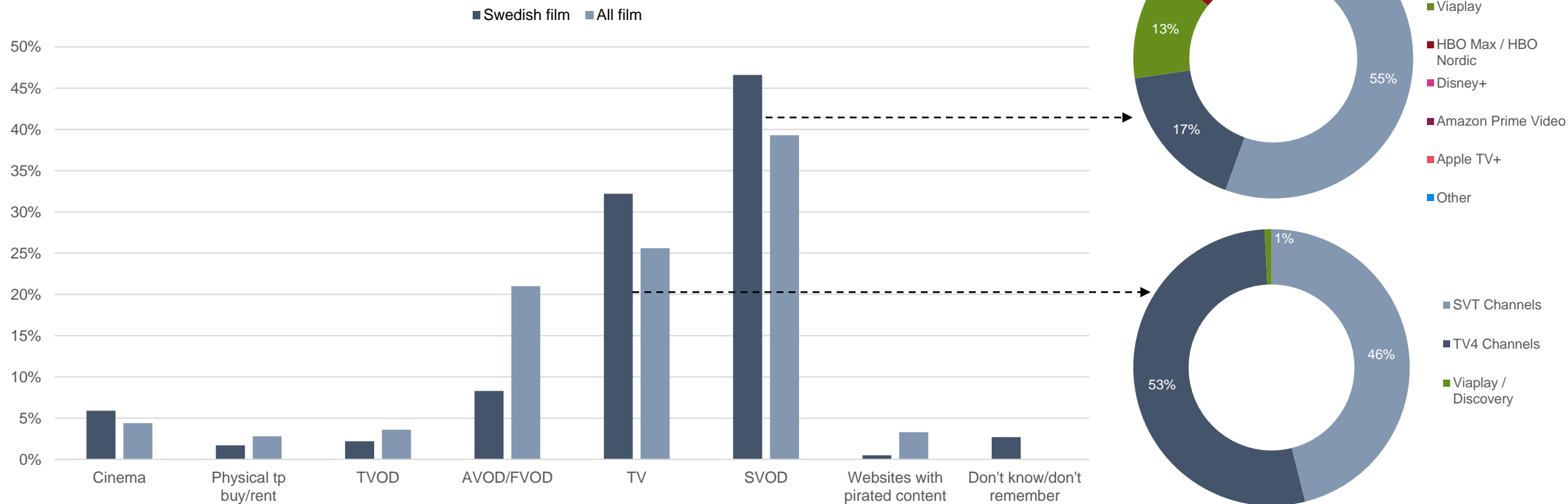
Share of films viewed by country of origin in 2023



The Swedish market share of total film viewing is at a high level compared to the Swedish market share in cinemas. Young people watched Swedish films more often than older audience groups in 2023.

Swedish films are seen more often on TV and SVOD

Share of viewing per window for the most recently seen Swedish film and all films watched in 2023



The Swedish Film Institute's audience survey Fall 2023, MMS Mediamätning i Skandinavien (share of TV viewers for Swedish films in 2023 per channel).

Top lists: most watched Swedish films in 2023

Most viewed Swedish films at Swedish cinemas

	Titel	Release date	Admissions
1	Håkan Bråkan	2022-12-25	232 800
2	Nelly Rapp – The Secret of the Black Forest	2023-10-20	148 300
3	Second Act	2023-02-24	127 400
4	The Final Race	2023-12-25	119 200
5	Hamarskjöld	2023-12-25	98 500
6	Canceled	2023-08-25	98 300
7	The Abyss	2023-09-15	95 500
8	Together 99	2023-10-13	95 500
9	Long Live the Bonus Family	2022-12-02	79 300
10	Knyckertz & snutjakten	2023-12-01	78 063

Most watched Swedish feature-length films on TV

	Titel	Year of release	Viewers
1	Sunny Side	2017	1 021 000
2	Repmånad eller Hur man gör pojkar av män	1979	902 000
3	Kingdom of Sweden	2018	847 000
4	The 100-Year-Old Man Who Climbed Out the Window and Disappeared	2013	845 000
5	Det ska va gött å leva - en film om Galenskaparna After Shave	2022	782 000
6	Beck - Steinar	2016	782 000
7	Sällskapsresan	1980	685 000
8	The 101-Year-Old Man Who Skipped Out on the Bill and Disappeared	2016	596 000
9	The Jonsson Gang's Greatest Robbery	1995	573 000
10	In Bed with Santa	1999	565 000

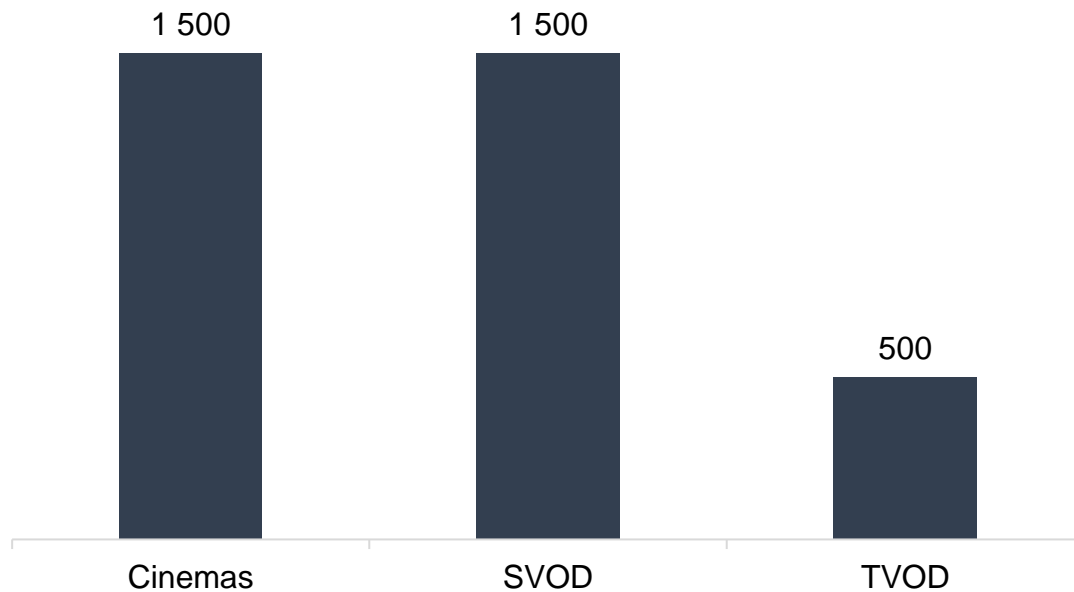
Most watched Swedish feature-length films on AVOD/FVOD*

	Titel	Year of release	Viewers
1	Beck - inferno	2023	605 500
2	Burn All My Letters	2022	279 200
3	Long Live the Bonus Family	2022	255 500
4	Triangle of Sadness	2022	198 100
5	I Am Zlatan	2022	164 000
6	Sune's Summer	1993	140 700
7	A Christmas Tale	2021	140 300
8	Till Sun Rises	2021	136 300
9	Johan Falk - Gruppen för särskilda insatser	2009	127 500
10	Hultsfred - berättelsen om en musikfestival	2023	124 000

*Also includes some titles on TV4 Play Plus (SVOD).
Filmägarnas Kontrollbyrå, MMS Mediamätning i Skandinavien

Cinemas account for 40 percent of Swedes' film spending

Consumer spending on feature films in Sweden 2023, MSEK (estimate)



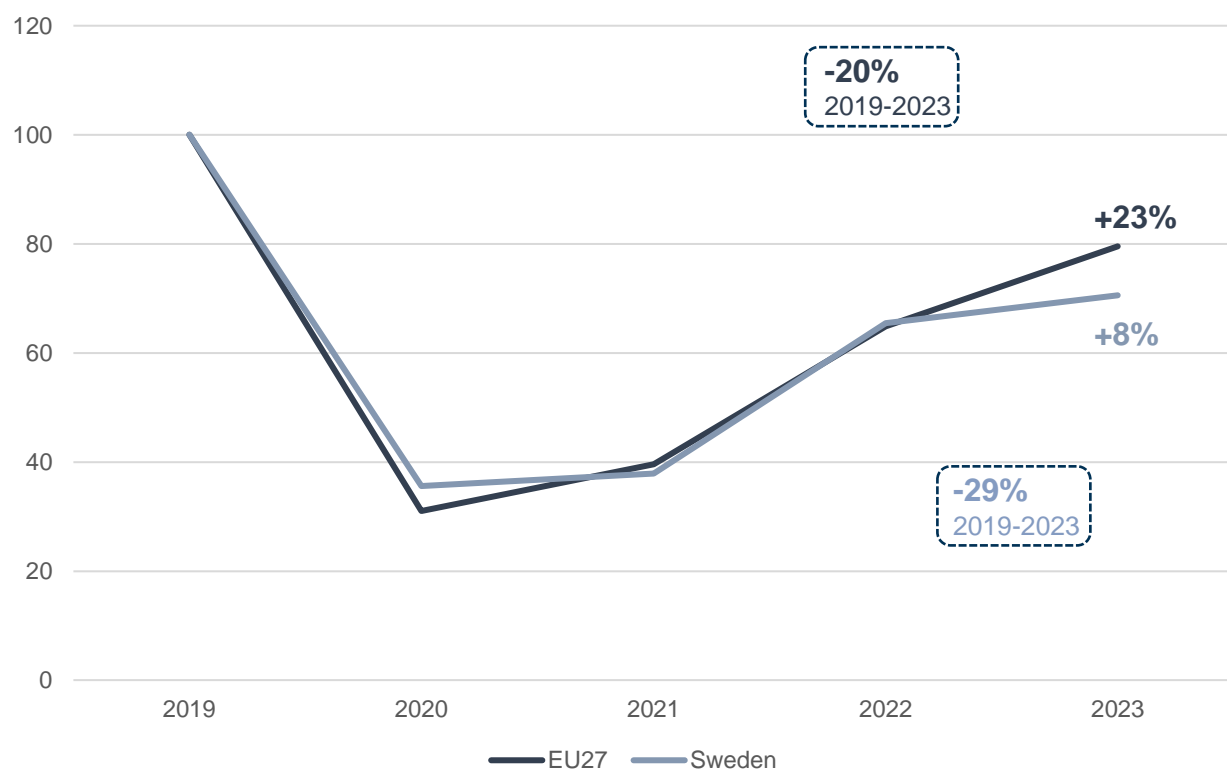
Even though cinemas accounts for a small part of the total film viewing, and even though cinema admissions are fewer than before the pandemic, the theatrical window accounts for a high proportion of Swedish consumers' spending on movies.

Swedish consumers spend an estimated SEK 3.5 billion per year on feature films.

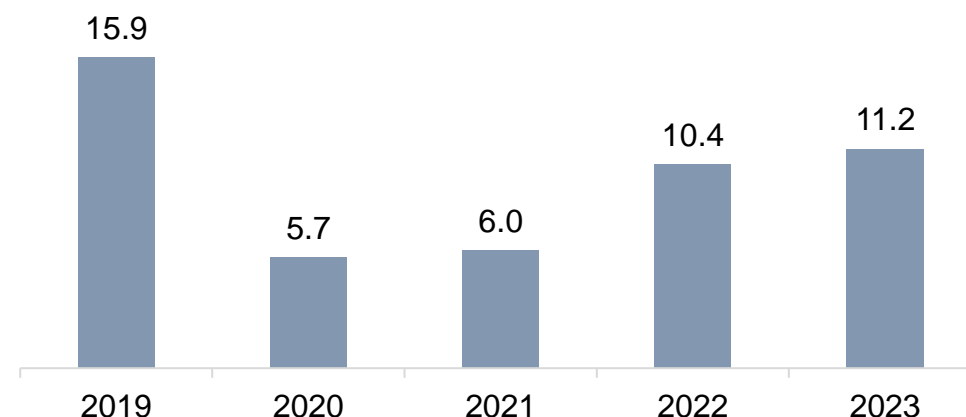
**Weaker recovery in Sweden
compared to the rest of Europe–
Low cinema attendance in older audience
groups inhibits growth**

Slight increase in cinema admissions in Sweden in 2023

Cinema admissions in EU27 and Sweden 2019-2023, indexed



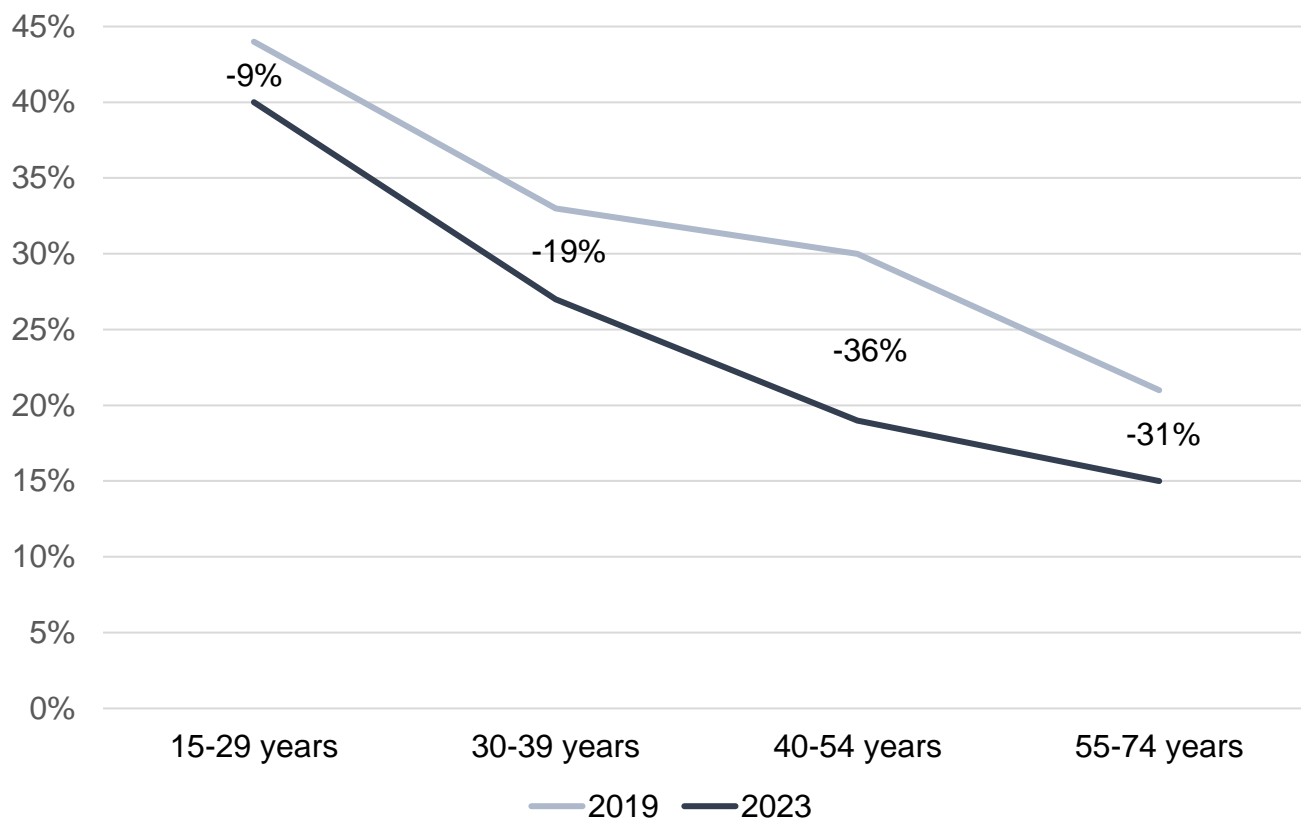
Cinema admissions in Sweden 2018-2023, million



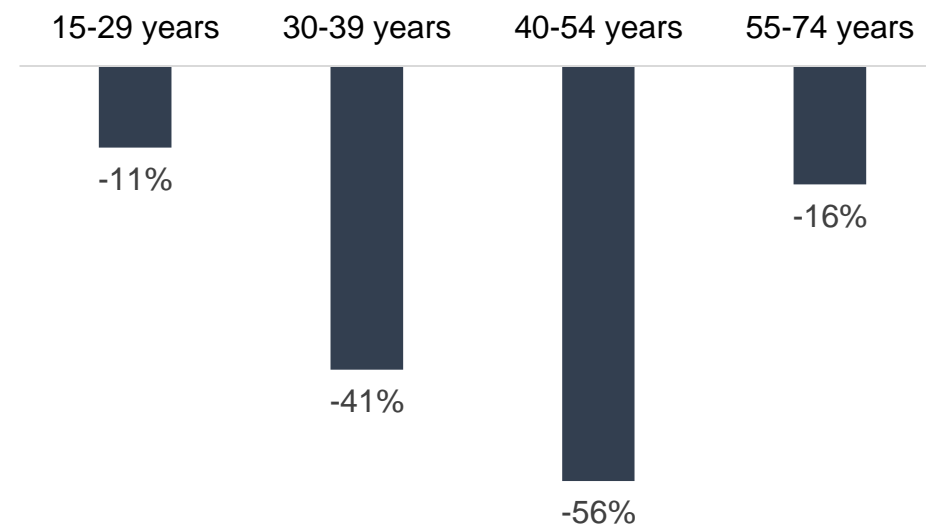
The trend for cinema admissions in Sweden was in line with the entire EU27 during the pandemic and even in 2022. But in 2023, Sweden increased significantly less than the EU27 in total. Cinema visits in Sweden were nearly 30 percent lower in 2023 compared to 2019.

Older audience groups explain the decrease

Proportion who went to the cinema at least every quarter by age



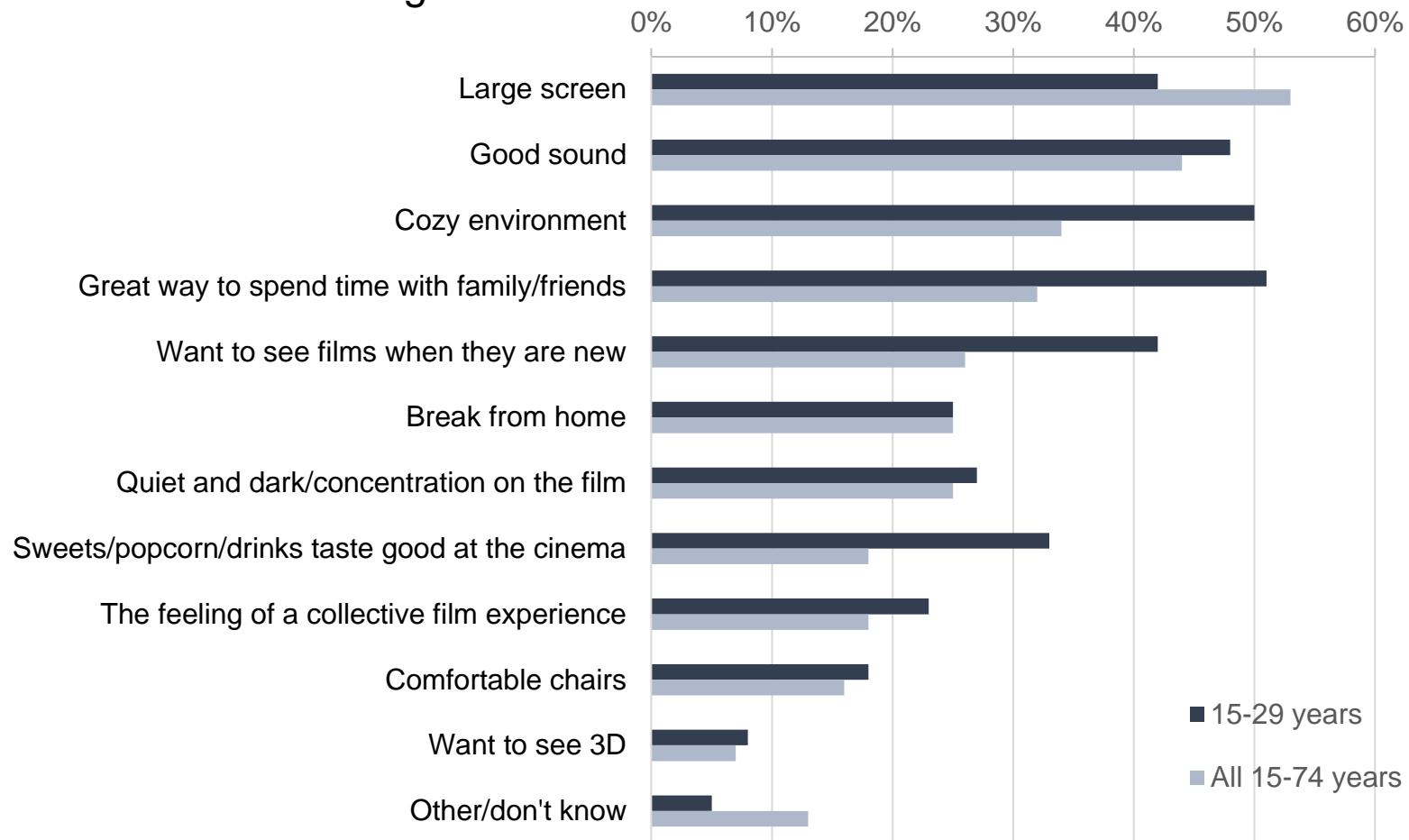
Change in number of cinema admissions, 2023 compared to 2019



The decrease in cinema admissions is mainly due to a change in behavior in older segments, while young people in Sweden go to the cinema about as much as before the pandemic.

Young people go to the cinema for social reasons

Motives for attending the cinema



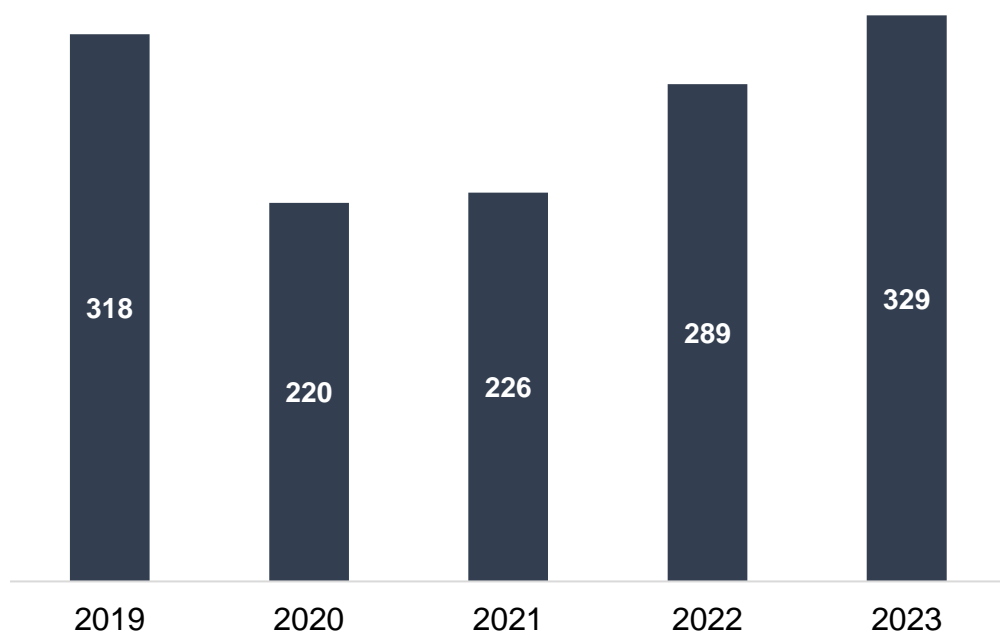
For young people, the social aspect, the cinema environment and new films are particularly important motives for going to the cinema.

Experiencing a big screen is a more important reason for older people than wanting to see films when they are new.

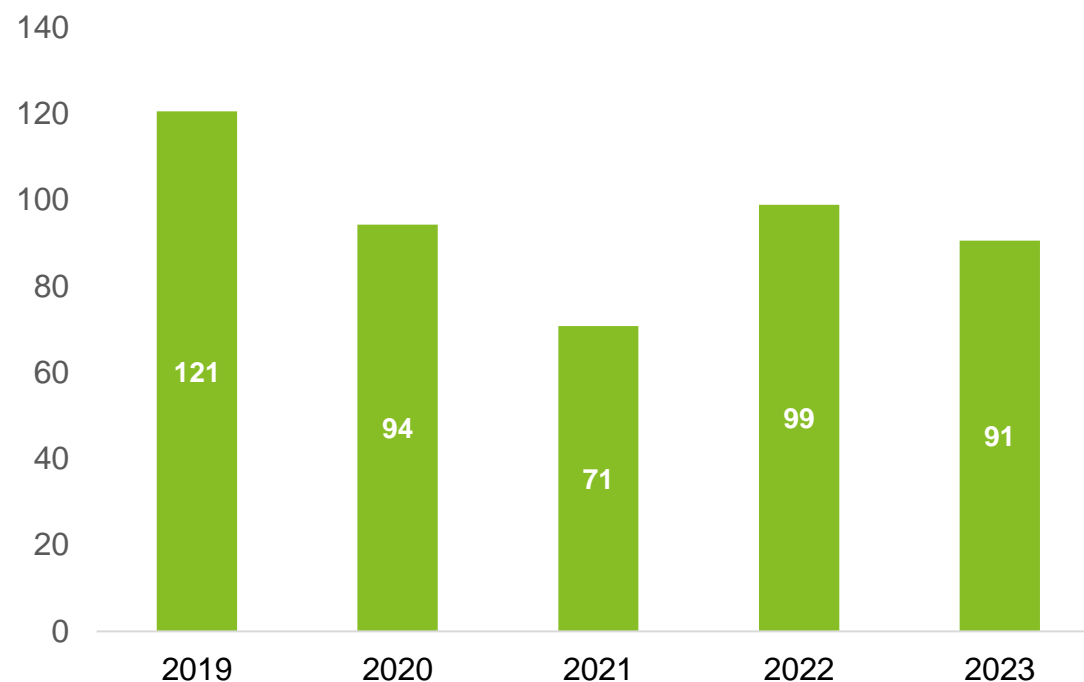
For the age groups 30-39 years and 40-54 years, getting a break from home is a particularly common motive.

More and more films are released in Swedish cinemas

Total number of feature-length theatrical releases in Sweden



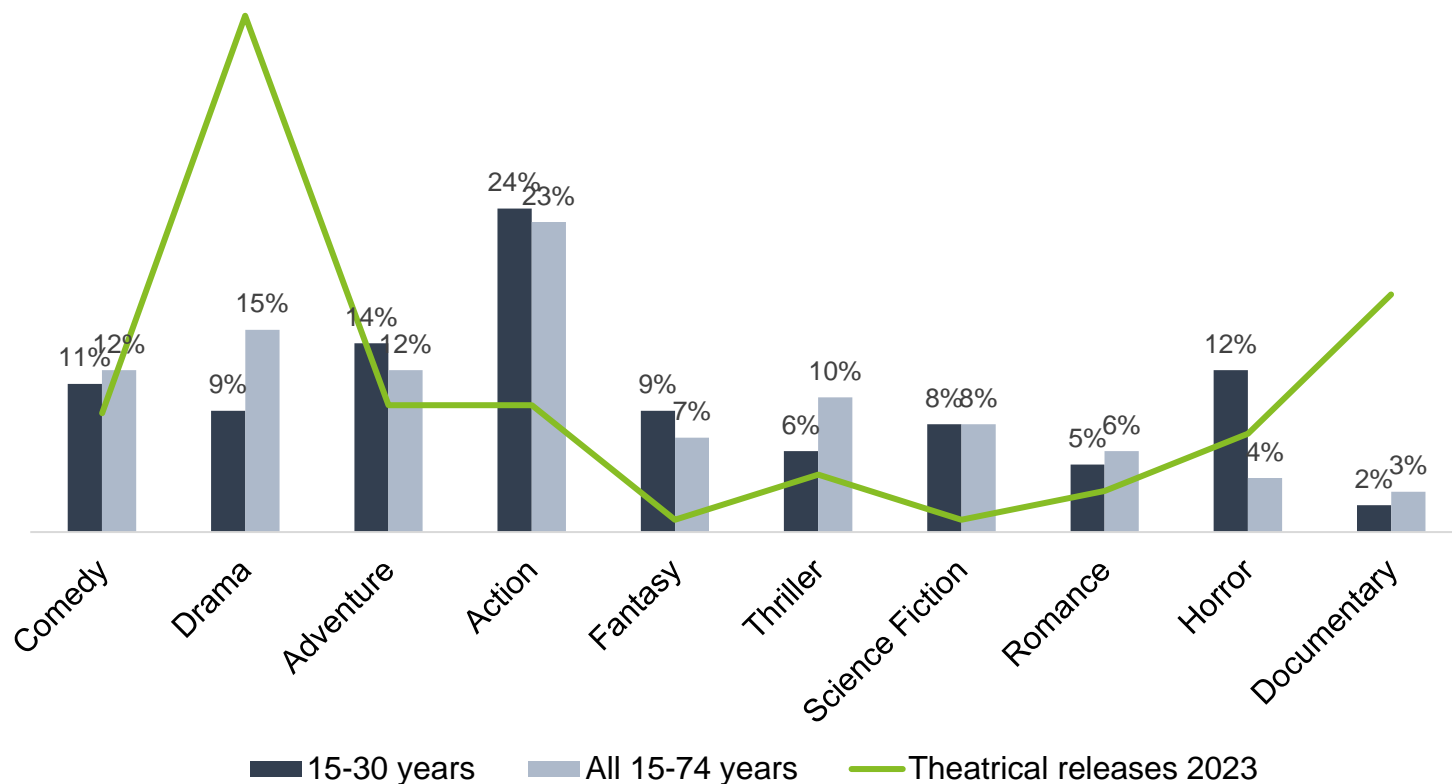
Average number of days between theatrical and digital release date*



**Only films with a maximum of one year between the two release dates have been included.
Moviezine*

Discrepancy between supply and demand in cinemas

Share of the audience that prefers different genres compared to theatrical releases in Sweden

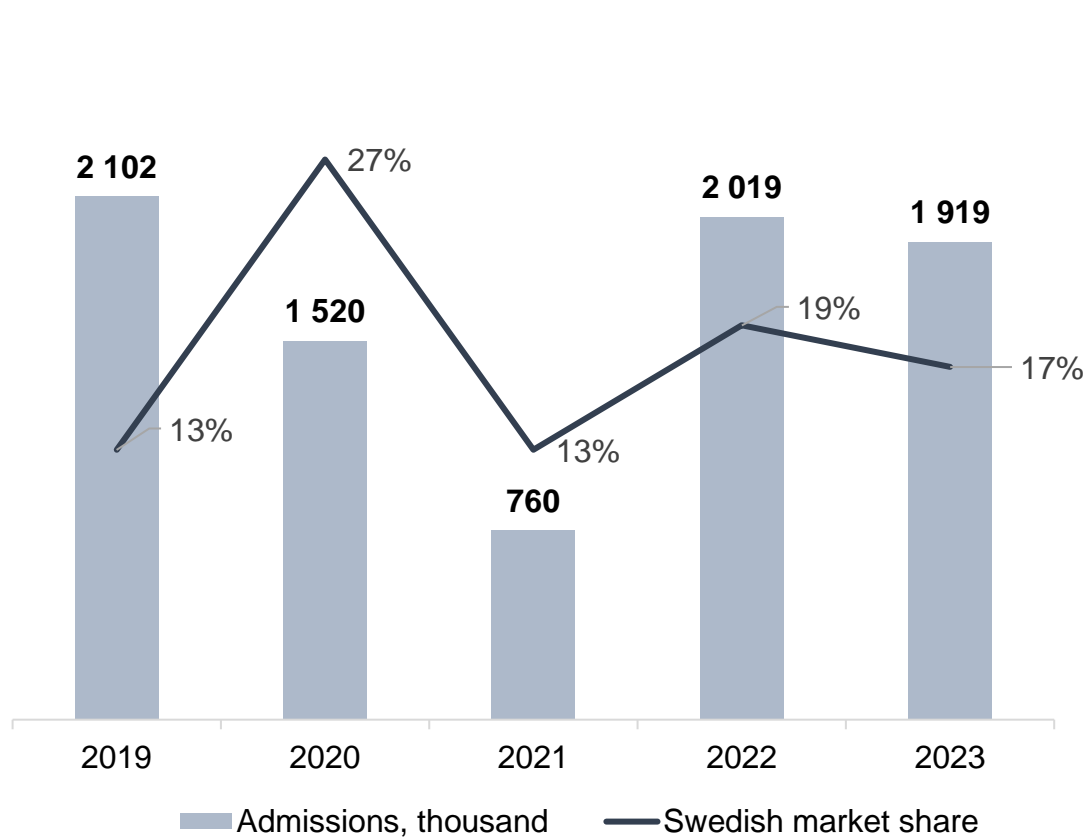


Looking at different genres, young people are more interested in adventure, action, horror, sci-fi and fantasy at the cinema in relation to the entire population. Older moviegoers are more interested in drama, thriller, romance and documentaries.

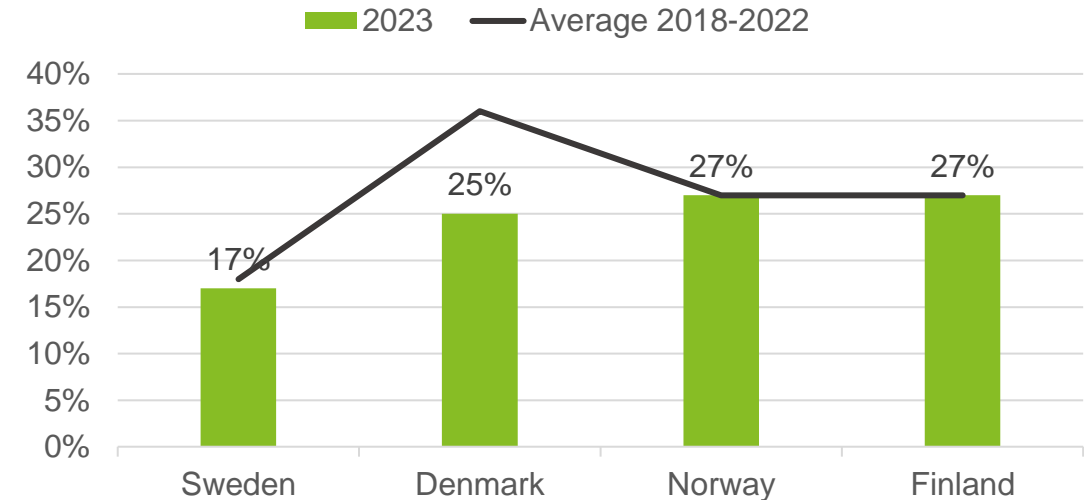
The range of new theatrical films in 2023 was greatest in drama and documentary. However, there were few films in the genres action, sci-fi, fantasy and thriller considering the demand for these.

The Swedish market share decreased slightly in 2023

Admissions and market share for Swedish films



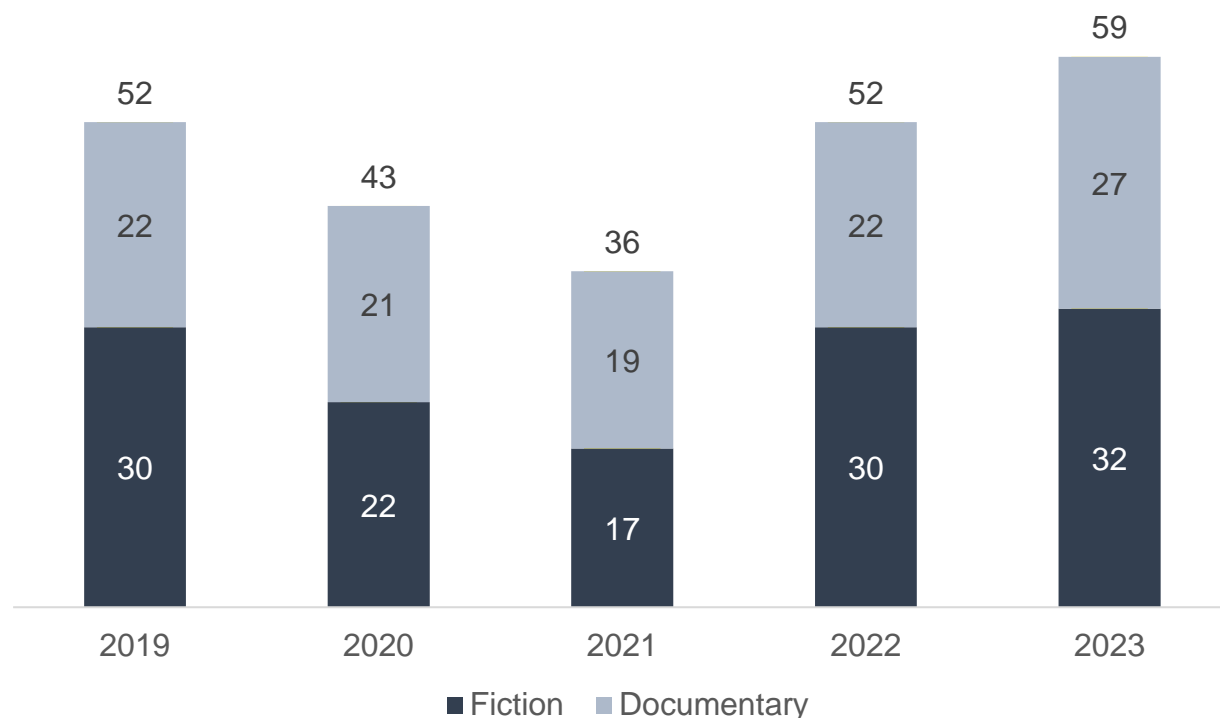
Domestic films' market shares per country



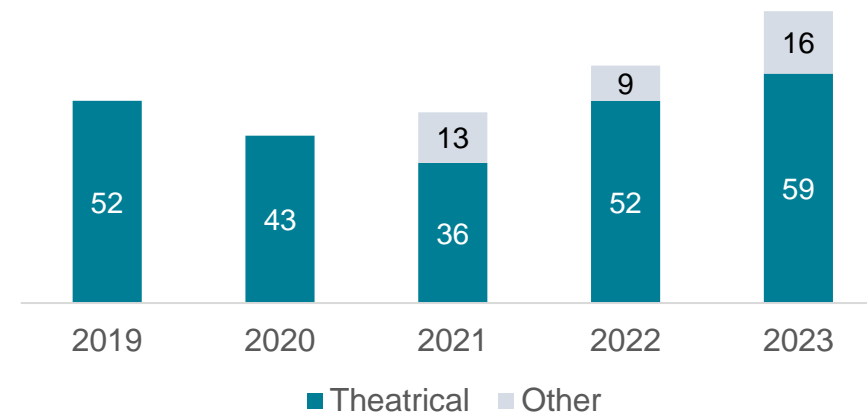
The attendance figures for Swedish films at the cinema remain at a low level compared to before the crisis year 2019 and the pandemic, as well as compared to other Nordic countries. In the previous five-year period, visits to Swedish films averaged 3.2 million per year.

Record number of Swedish film releases

Number of Swedish feature-length theatrical releases



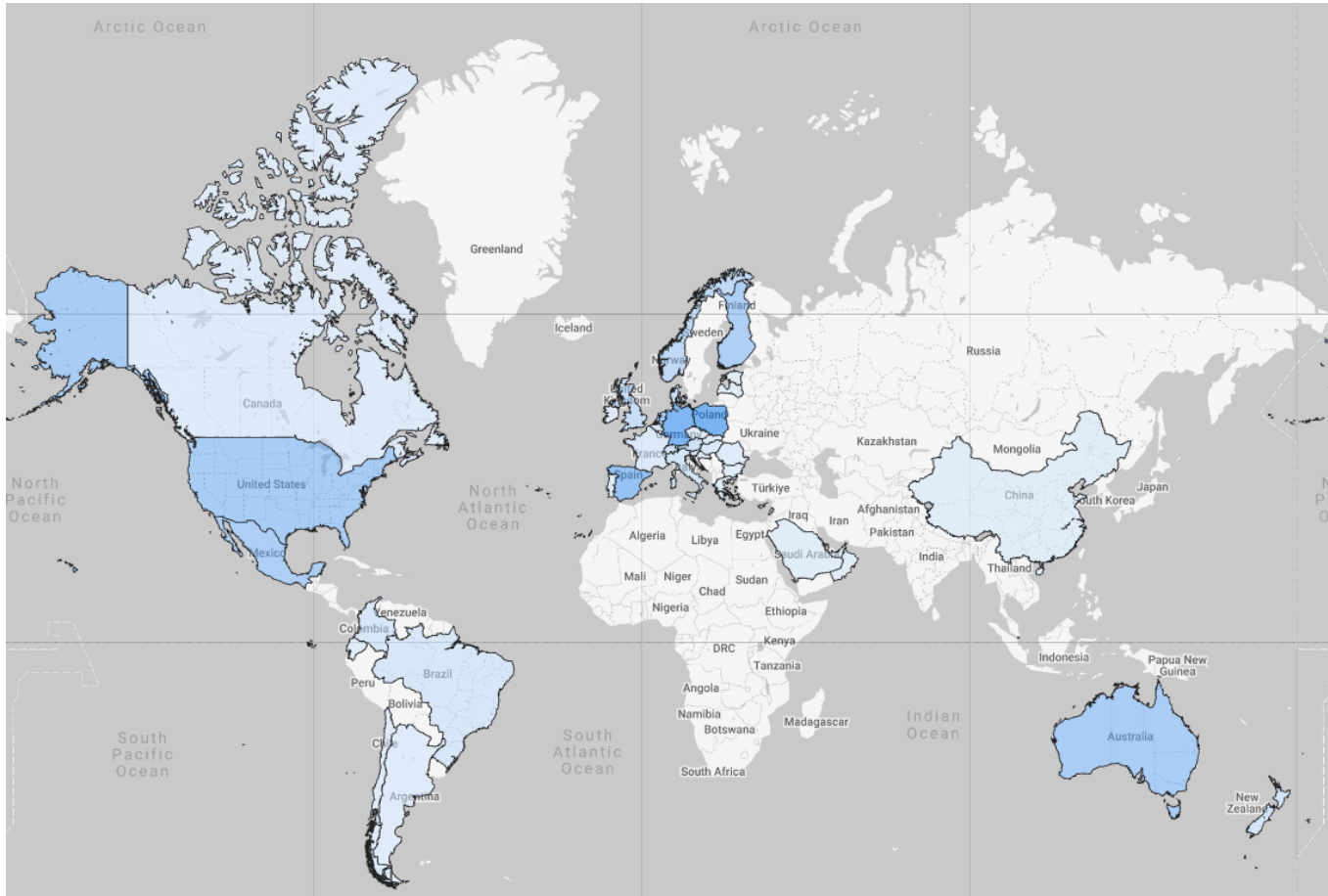
Number of Swedish feature-length releases



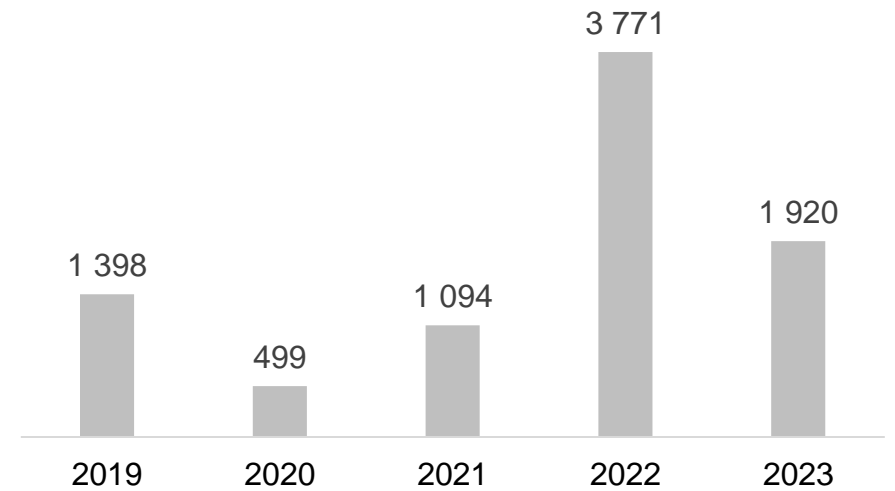
A total of 75 Swedish feature films were released in 2023, of which approximately 80 percent in cinemas. The number of theatrical releases was higher than ever before. The large number of Swedish films in cinemas may have contributed to the fact that individual films had difficulty reaching the audience, not least when there was a concentration of Swedish releases in the fall.

Internationally: 107,000 screenings of Swedish films

International cinema screenings of Swedish films in 2023*



Foreign admissions for Swedish films, thousand



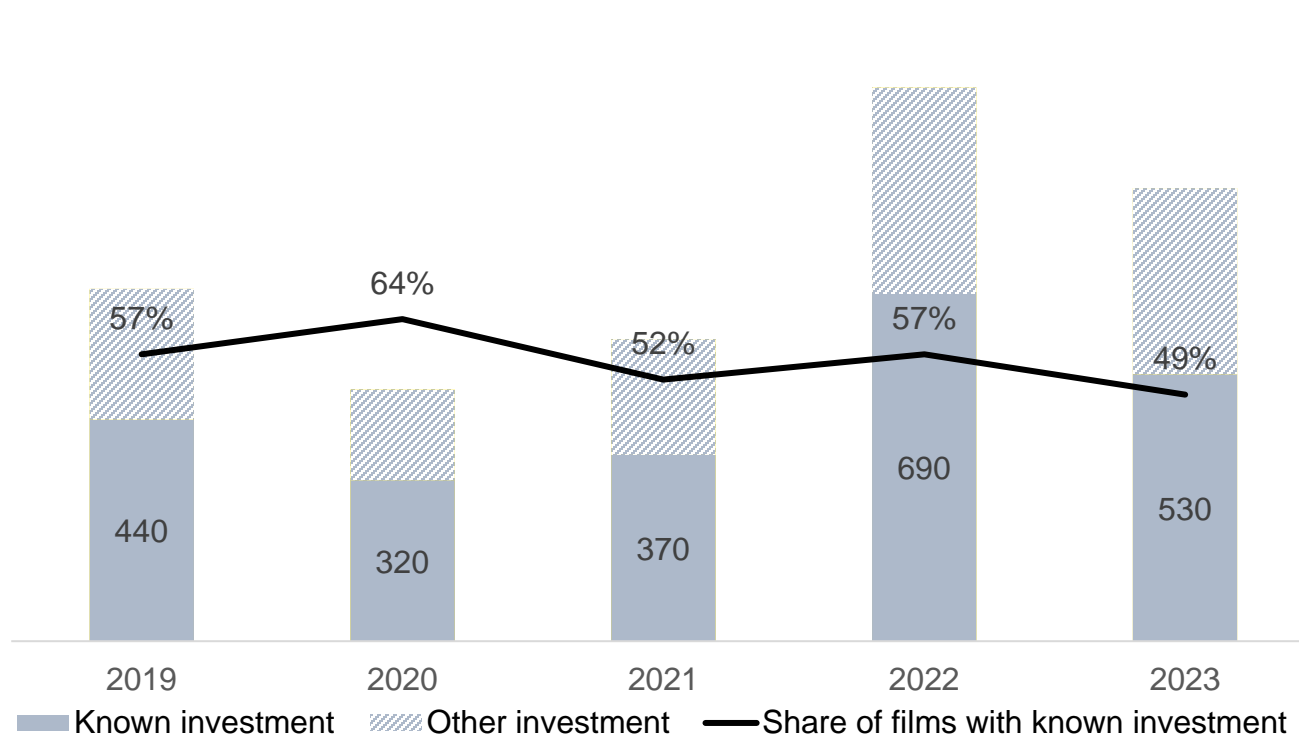
In 2023, Swedish films were shown 107,000 times in cinemas abroad. The films that had the most screenings were *Triangle of Sadness*, *Boy from Heaven*, *Vem är du*, *Mamma Mu?* and *Feed*. The number of admissions for Swedish films abroad was as many as the admissions in Sweden during the year. In 2022, Swedish films had significantly more admissions abroad than in Sweden.

*Based on a selection of approximately 1,000 Swedish titles.
Usheru, *Lumiere Pro*

Reduced investment in feature films
– Lower average budget for both feature fiction films and documentaries with funding from the Swedish Film Institute

Lower investments but more feature fiction films outside the support system

Investment in Swedish feature fiction films 2023, MSEK*

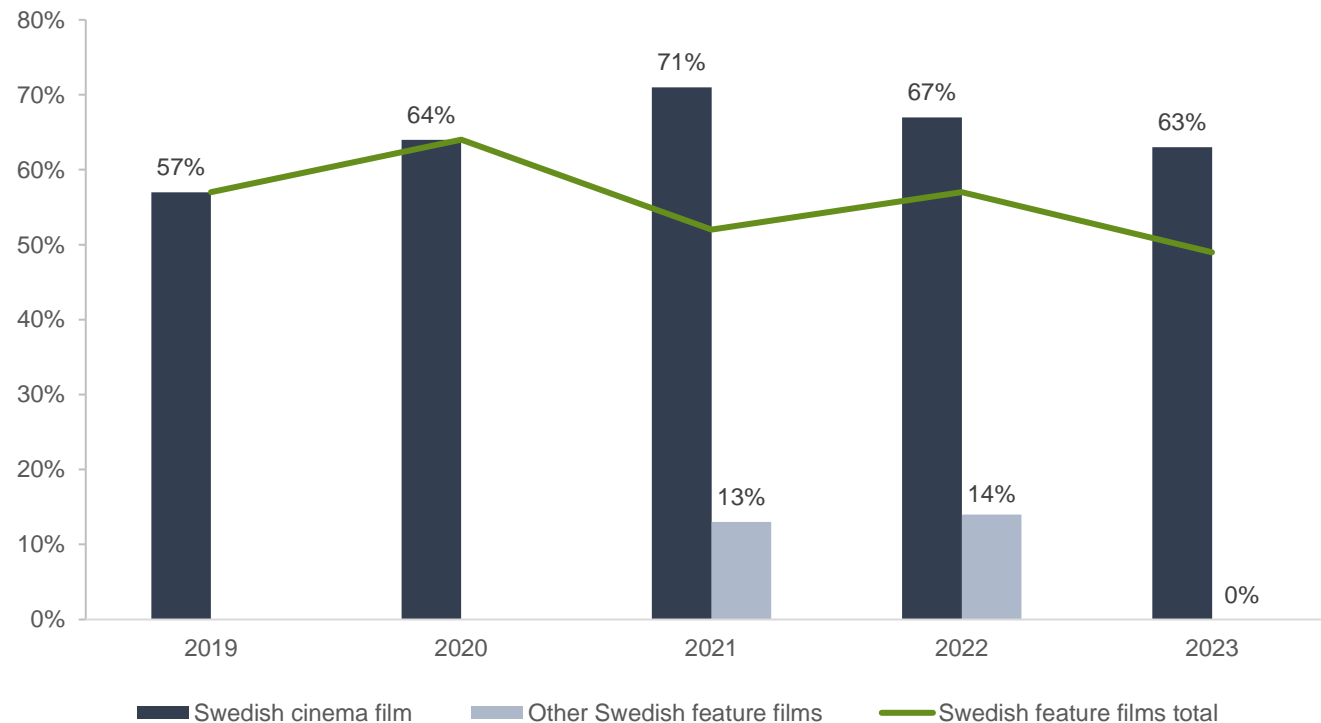


The investment in films with funding from the Swedish Film Institute decreased by approximately 160 MSEK in 2023. A contributing factor is the reduced number of high-budget films. In 2022, nine films, with available financial data, had a budget over 30 MSEK. In 2023, this number was five.

The known investment is based on the budget for films that have received production funding from the Swedish Film Institute during the respective release year.

The majority of theatrical films have funding from the Swedish Film Institute

Share of Swedish feature fiction films with production funding

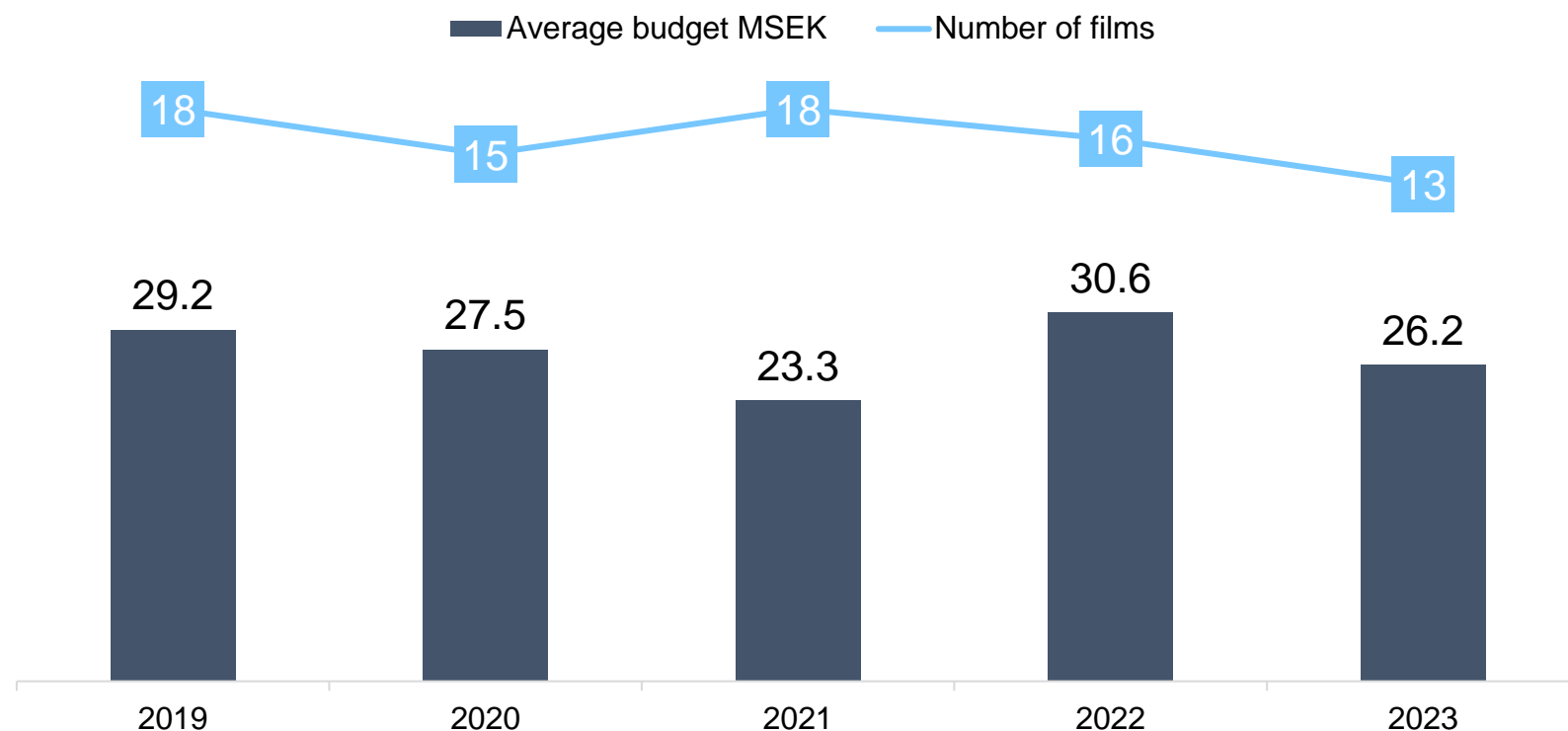


The majority of theatrical films receive funding from the Swedish Film Institute. Since the pandemic, however, releases in other places have become more common, and looking at the total, the proportion of films with funding in 2023 ends up just under 50 percent.

Among other distribution channels, VOD is growing and these releases rarely seek funding from the Swedish Film Institute.

SFI-funded feature film budgets decreased in 2023

No. of Swedish feature fiction-films* and average budget, per funding-year

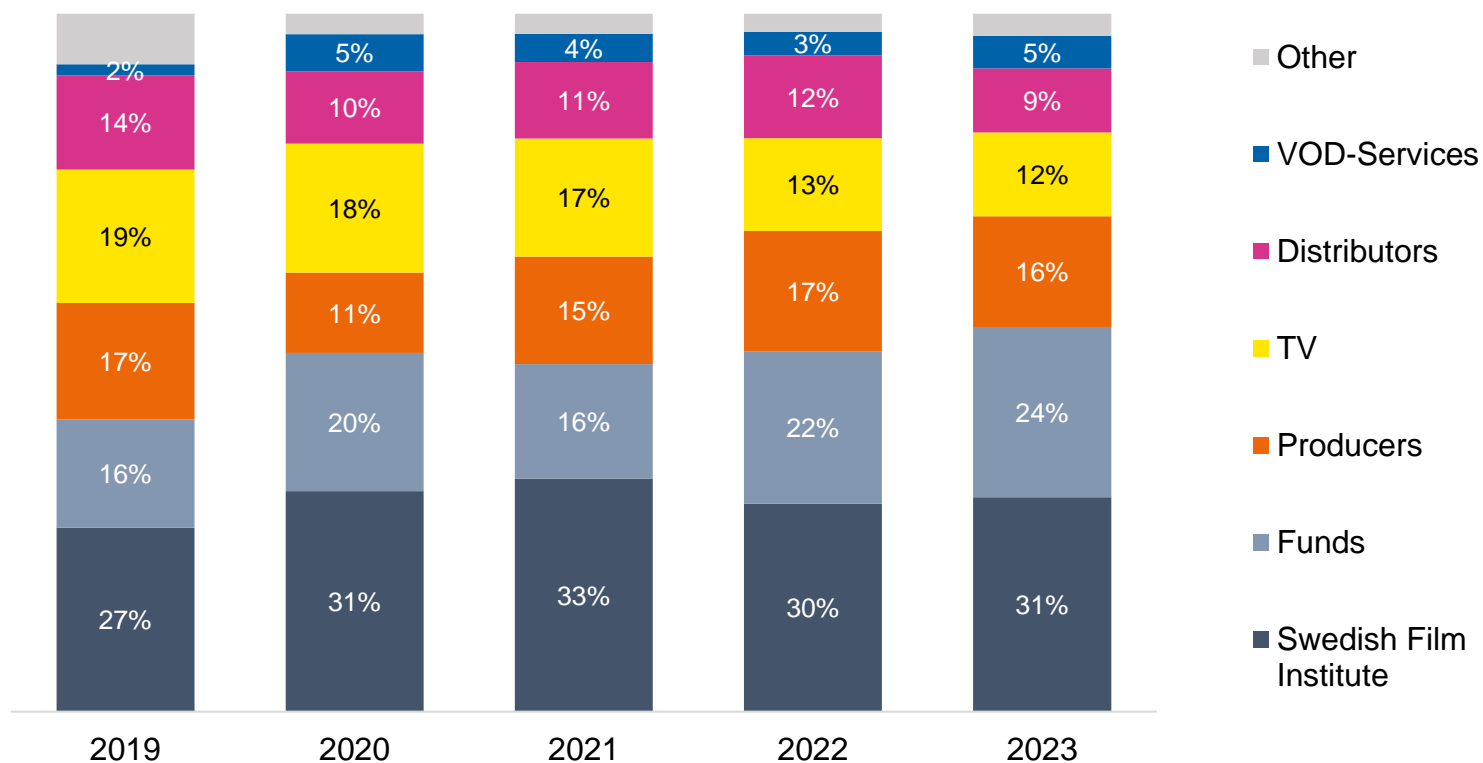


Both the average budget and the amount of feature fiction-films decreased in 2023 compared to 2022.

*Feature-length fiction films with funding from a commissioner or market funding at the Swedish Film Institute

TV's share of financing has been slowly decreasing

Average financing Swedish feature fiction film*

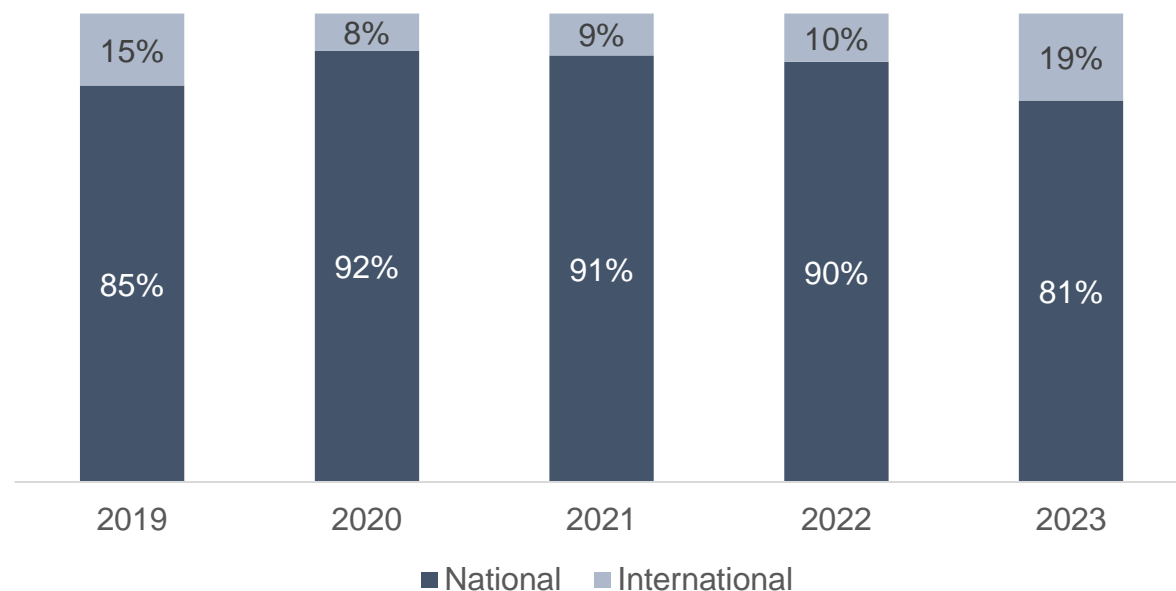


TV's share of average financing has been decreasing since 2019. At the same time the share coming from funds and the Swedish Film Institute has increased.

*Feature-length fiction films with funding from a commissioner or market funding at the Swedish Film Institute

Increased international funding 2023

International financial share of Swedish feature fiction-films with SFI funding*



The average budget for a Swedish feature fiction-film decreased in 2023 mainly due to smaller investments from national sources.

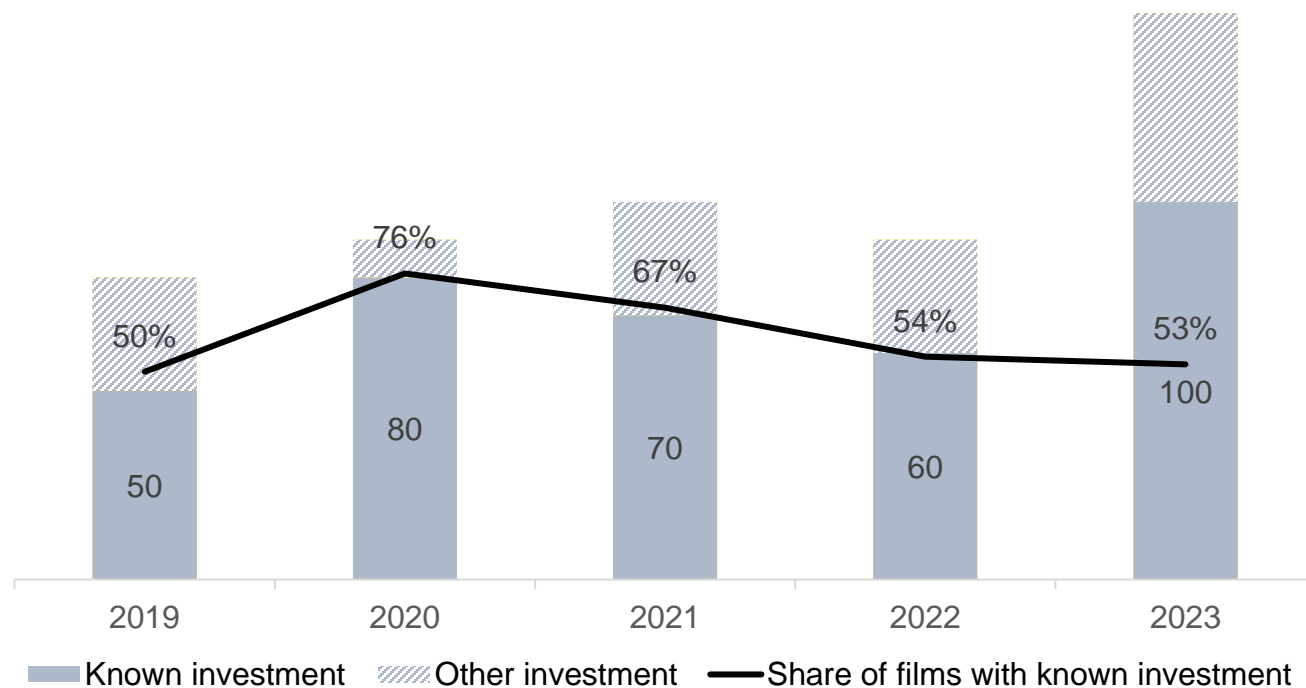
National financing, on average, decreased by 6 MSEK 2023, which may have increased the need of international funding.

On average international funding increased with about 1.5 MSEK in 2023 and therefore, international sources, increased its average financial share to 19 percent.

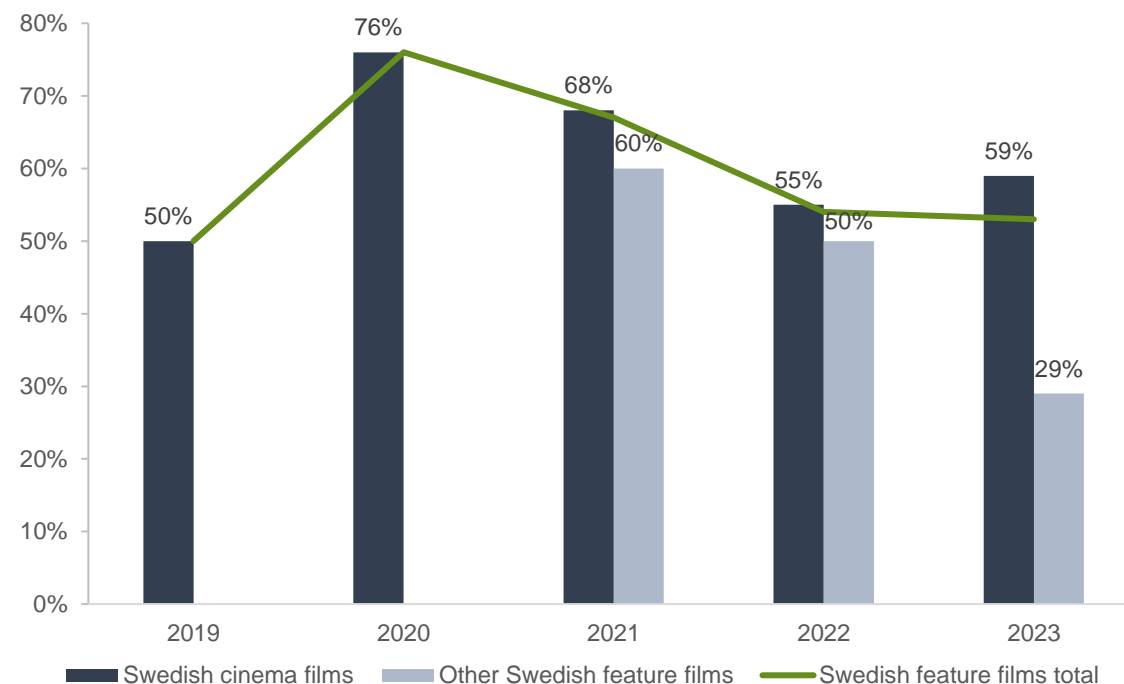
*Feature-length fiction films with funding from a commissioner or market funding at the Swedish Film Institute

More Swedish documentary features in 2023

Estimated investment in Swedish documentary feature films 2023, MSEK*



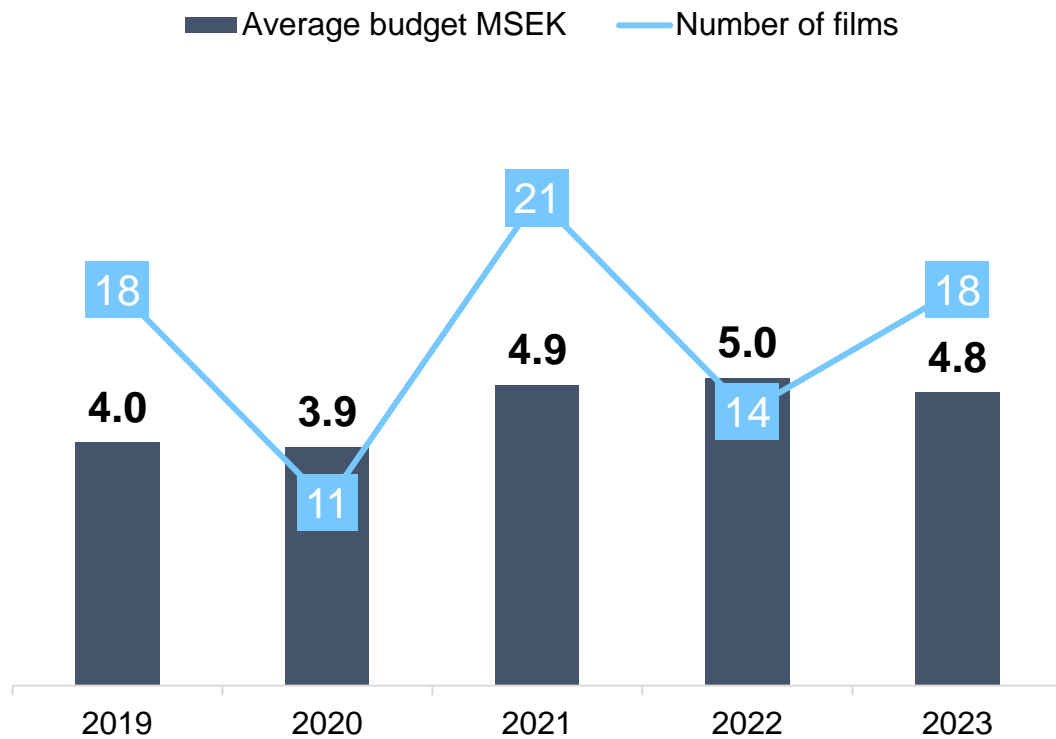
Share of Swedish feature documentary films with production funding



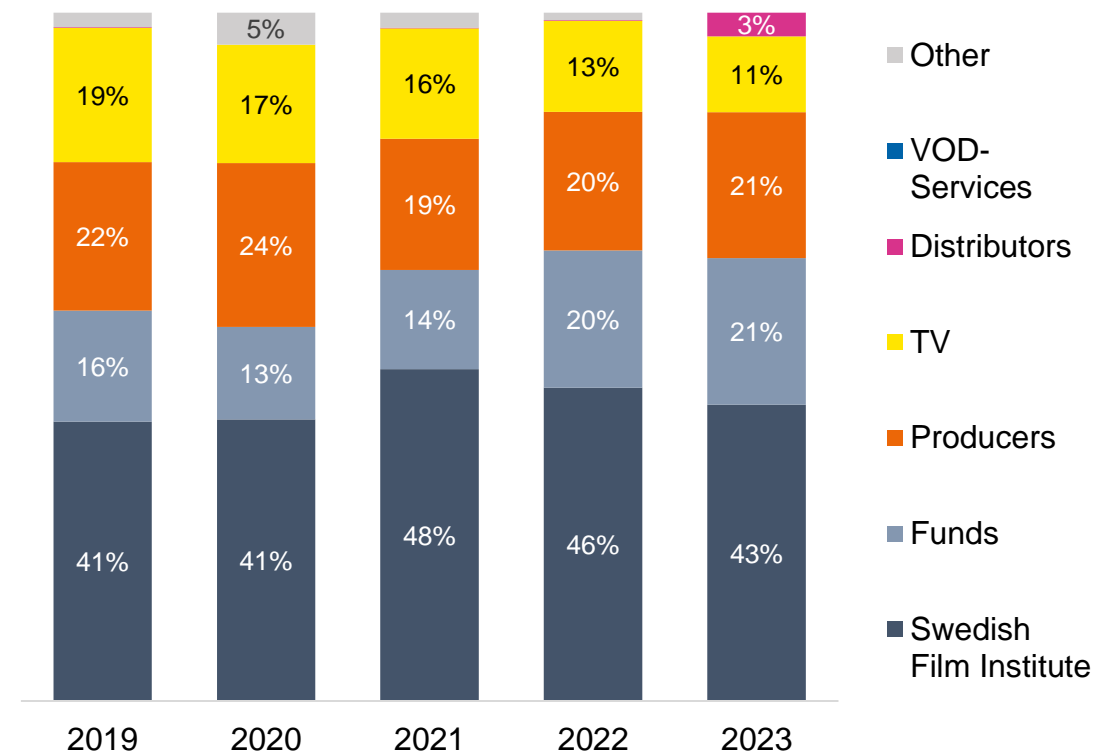
The estimated financing is based on the number of feature films that premiered each year. Financial data from production-supported films is used as a foundation. For films without support, the average budget is used, with the average funding from the Film Institute, for each year, being deducted.

Average budget for a Swedish documentary decreased in 2023

Number of Swedish feature-length documentaries* and average budget, per funding-year



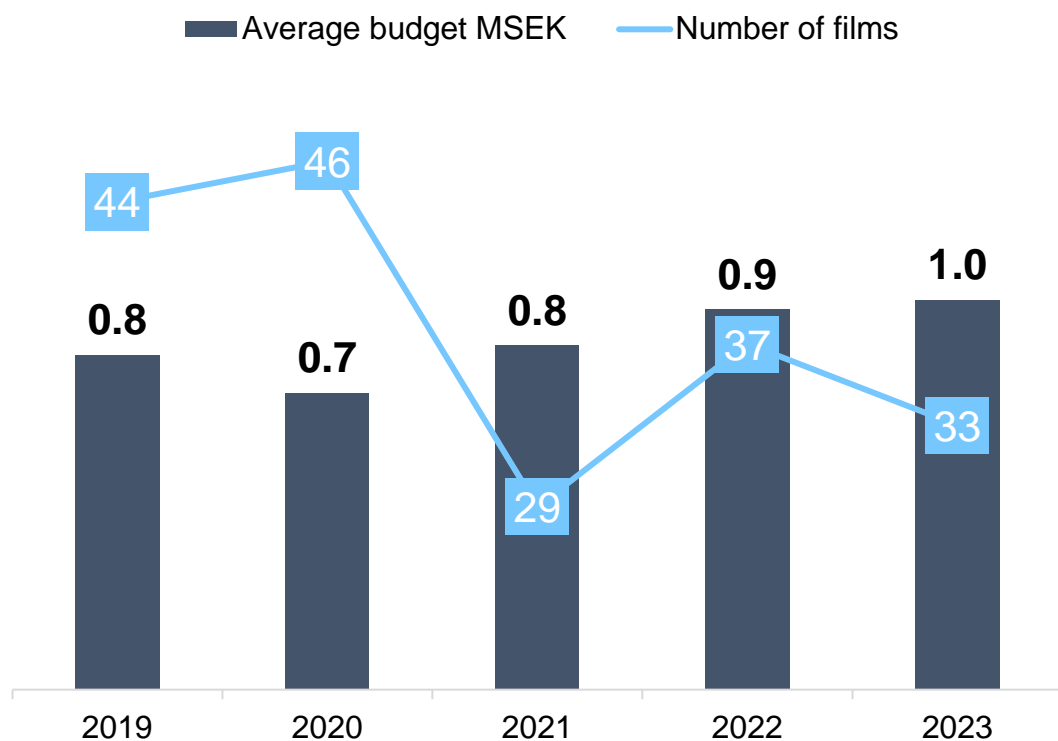
Average financing Swedish feature-length documentaries



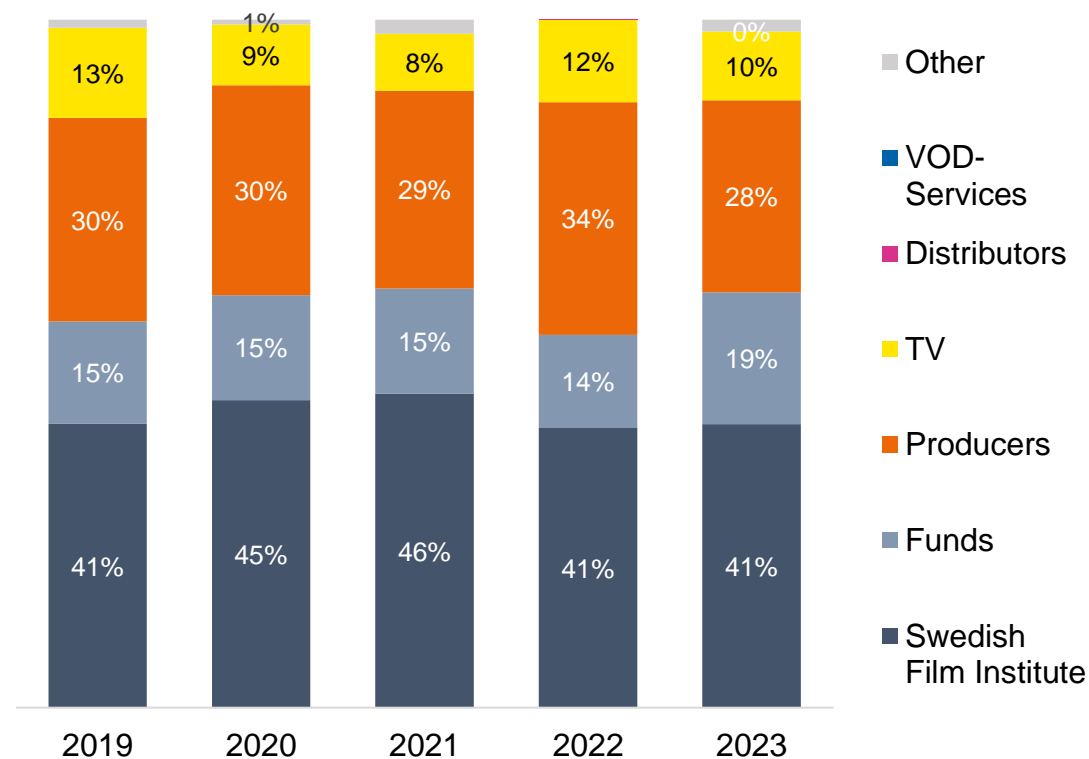
*Films with funding from a commissioner or market funding at the Swedish Film Institute

Swedish short films had an average budget of 1 MSEK 2023

Number of short Swedish films* and average budget



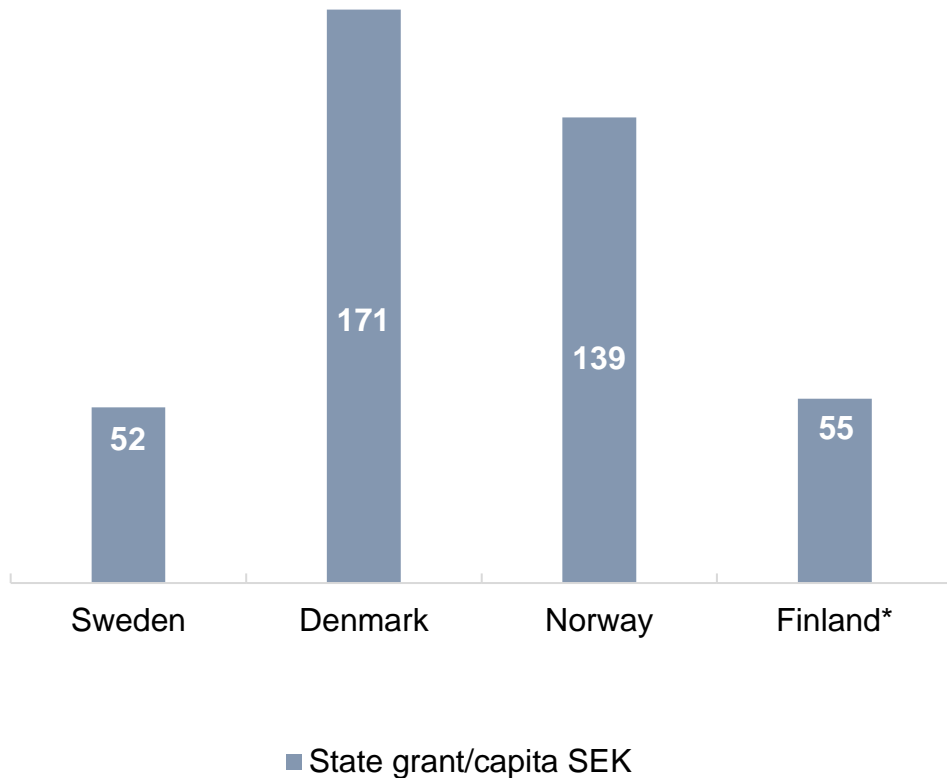
Average financing of Swedish short films



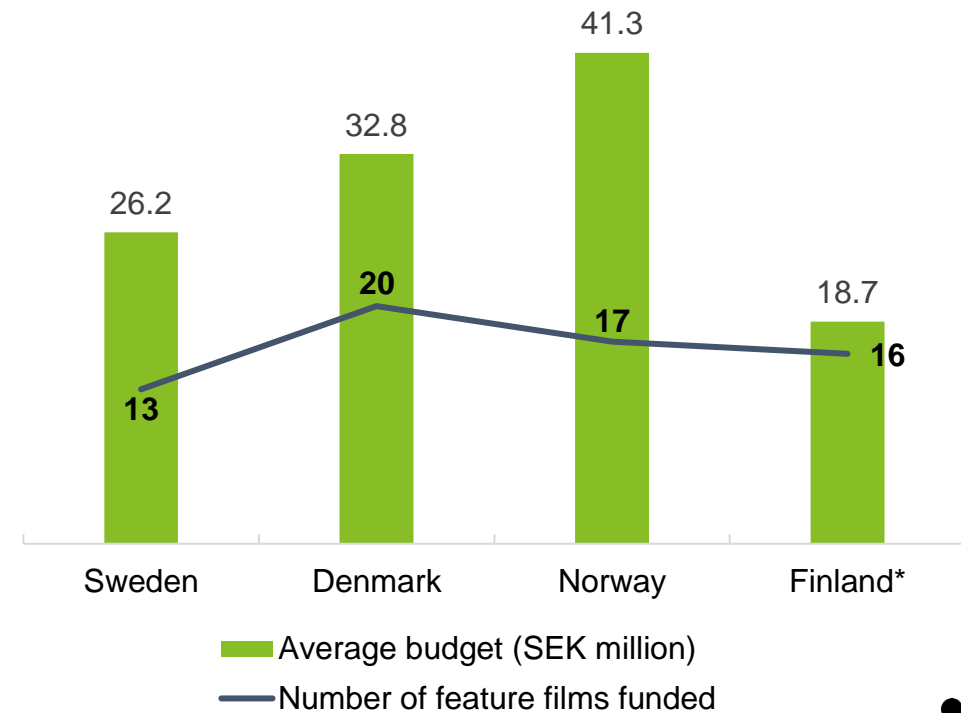
*Films with funding from a commissioner or market funding at the Swedish Film Institute

Sweden has the lowest state funding of film in the Nordics

Government grants to the Film Institutes per capita in 2023



Average budget of feature fiction-films with state funding (SEK million), number of feature fiction-films in 2023



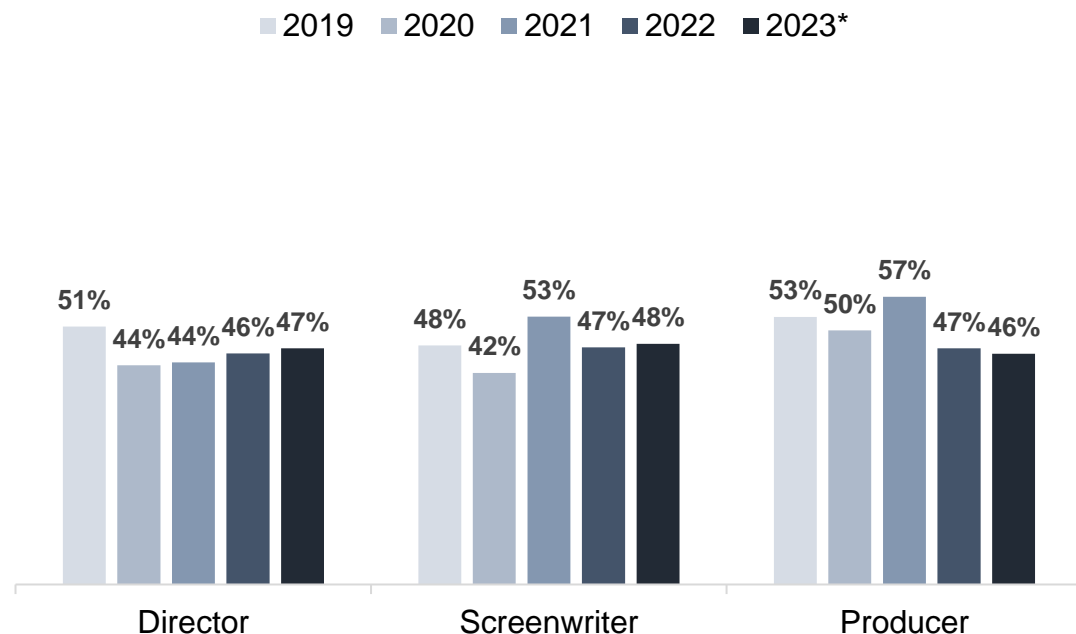
*Refers to the Finnish Film Foundation, which has a narrower mission than the Swedish Film Institute.
DFI, NFI, SES

Even gender distribution in key roles for feature fiction and documentary films in 2023

– Women under-represented in feature fiction films with high budgets

Even gender distribution in roles behind funded films

Share of funded films with a woman as...



**In the Swedish Film Institute's application procedure it is possible to state "other" as gender beyond man or woman. During 2023, for production funded Swedish films, three percent of directors, screenwriters and producers identified themselves as "other".*

Among all Swedish films for the past five years, that received funding from the Swedish Film Institute, the gender distribution has been even.

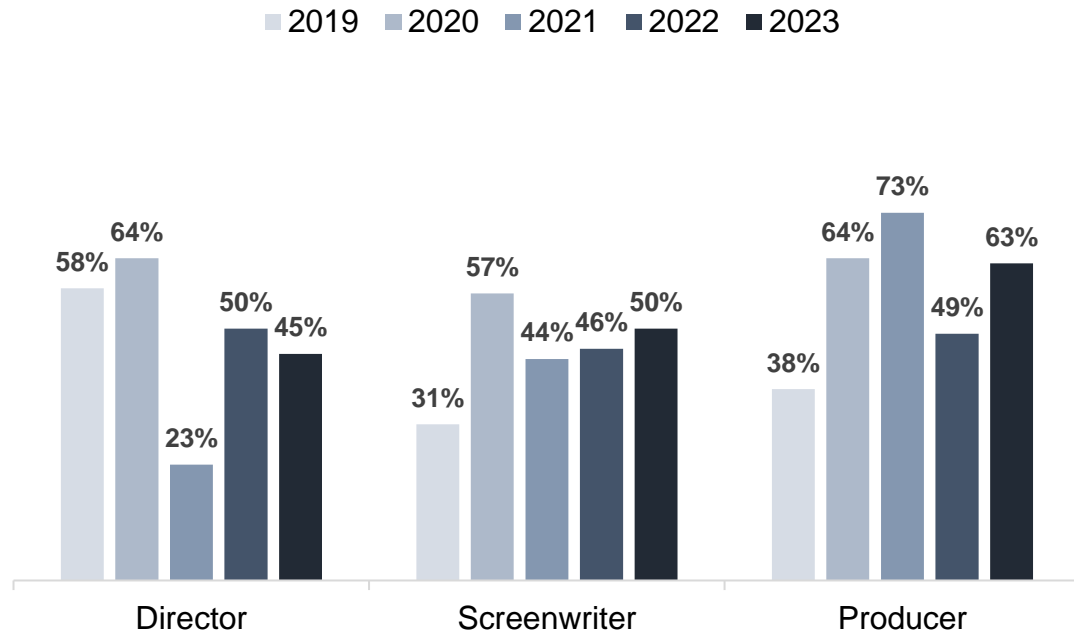
However, there is a clear under-representation of women, as directors and screenwriters, among feature fiction films with high budgets.

Between 2014 and 2018 the share of women screenwriters were especially low, but during 2019 and 2023 the share has noticeably increased within all budget-categories.

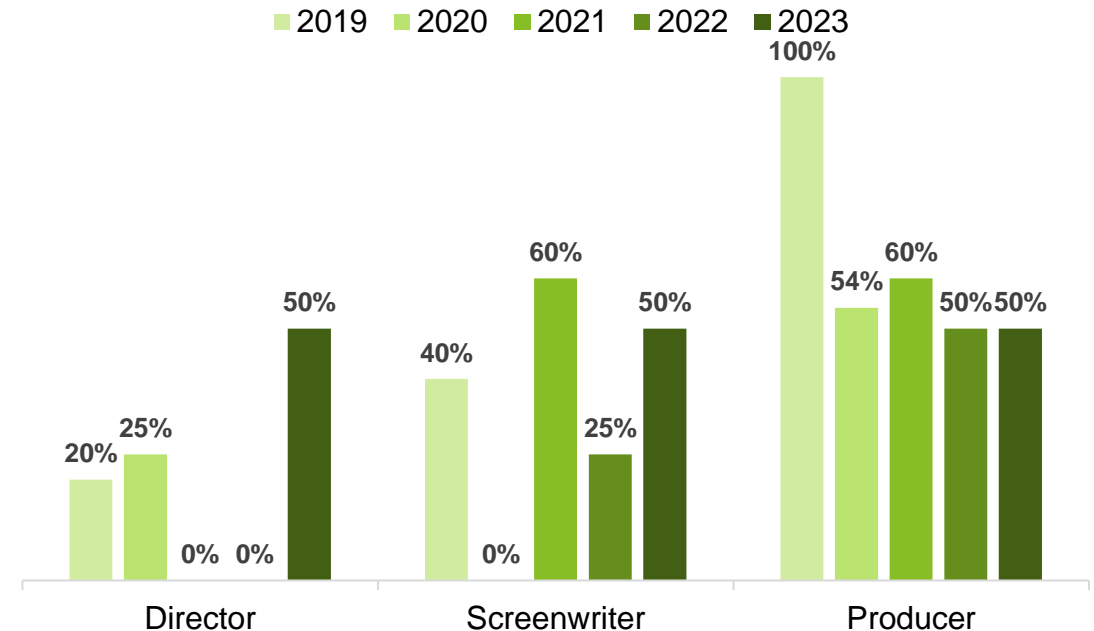
From 2023, in the Swedish Film Institute's statistics, "other" is included as an option for gender. In 2023 three percent, in each role, has in total opted for "other" rather than man or woman.

2023 the first year of an even gender distribution for market funded feature fiction films

Share of commissioner funded feature fiction films with a woman as...

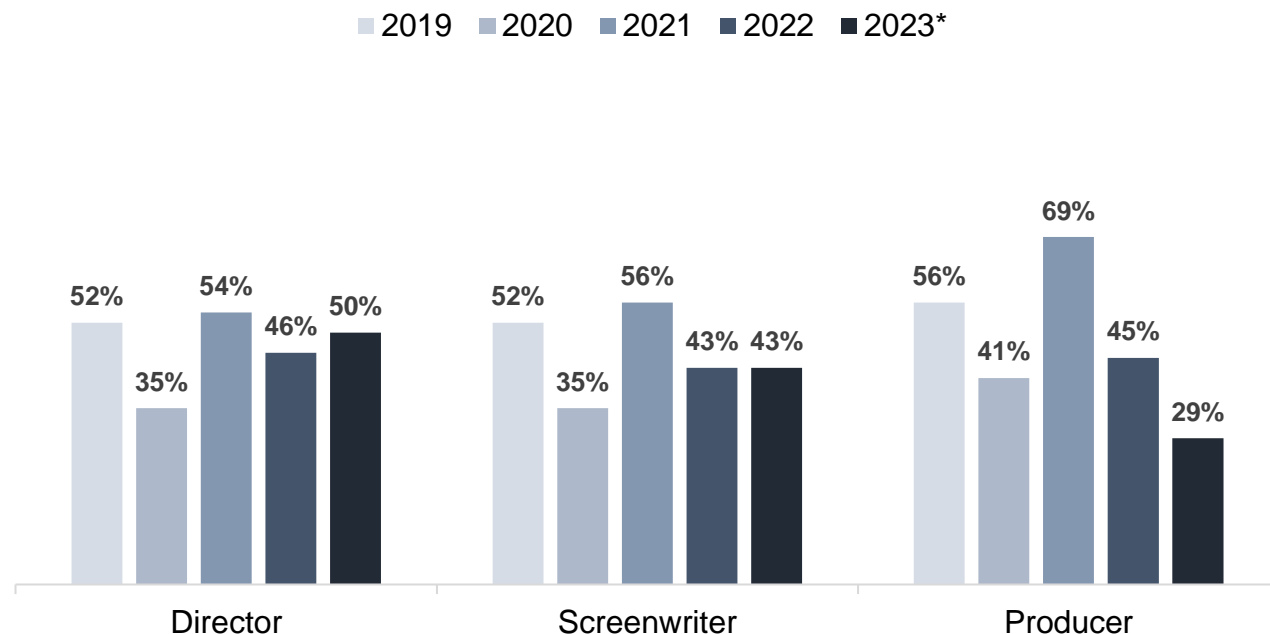


Share of market funded feature fiction films with a woman as...



Fewer female producers behind short fiction films in 2023

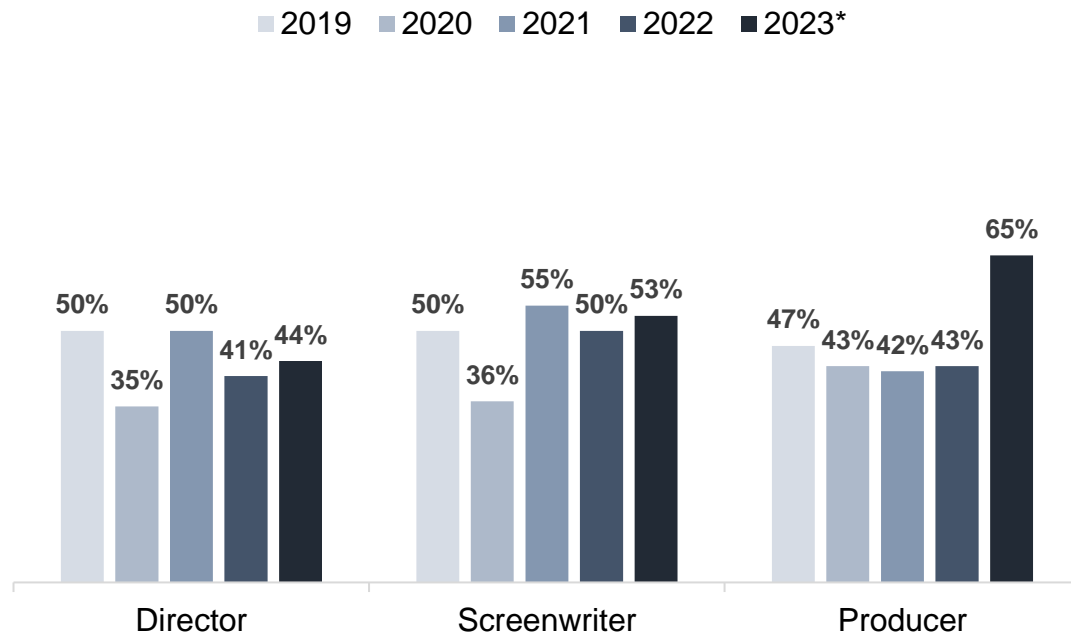
Share of commissioner funded short fiction films with a woman as...



**In the Film Institute's application procedure it is possible to state "other" as gender beyond Man or Woman. During 2023, for production funded Swedish short fiction films, three percent of screenwriters and two percent of producers identified themselves as "other".*

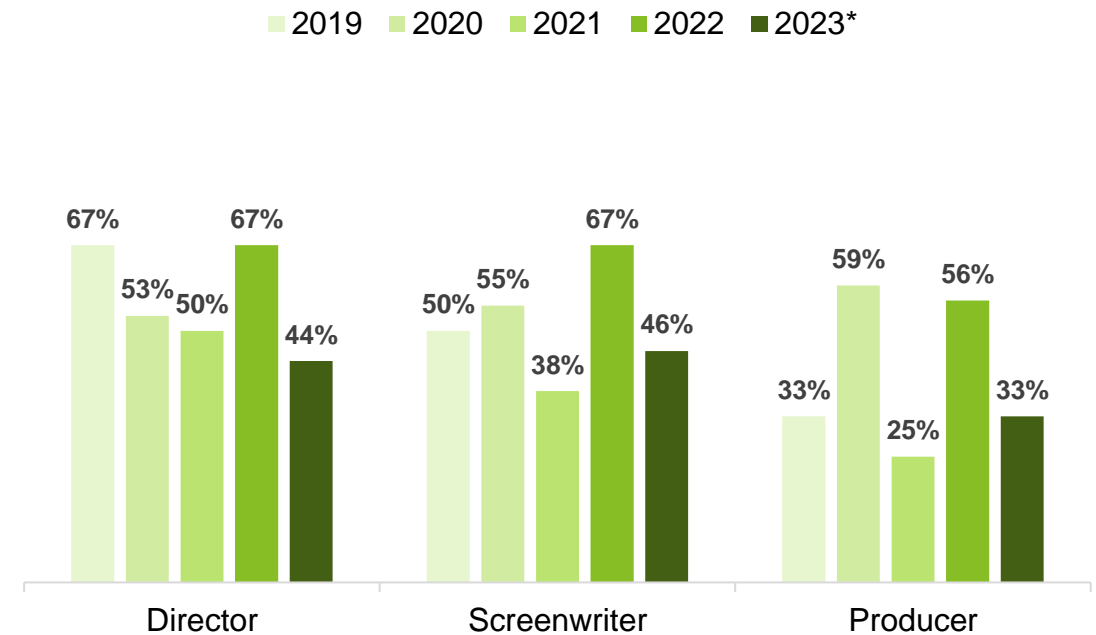
Increased share of female producers behind feature documentary films

Share of commissioner funded feature documentary films with a woman as...



**In the Film Institute's application procedure it is possible to state "other" as gender beyond Man or Woman. During 2023, for production funded swedish short fiction films, six percent of directors identified themselves as "other".*

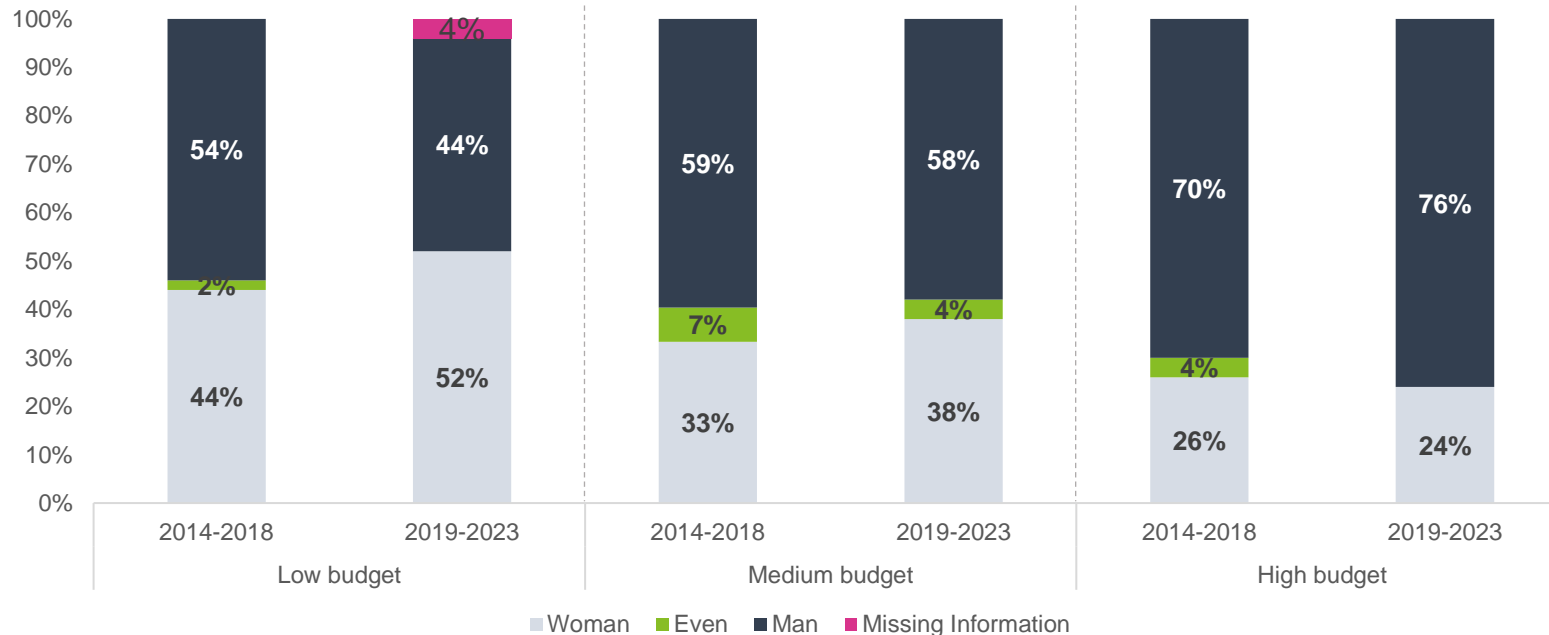
Share of commissioner funded short documentary films with a woman as...



**In the Film Institute's application procedure it is possible to state "other" as gender beyond Man or Woman. During 2023, for production funded swedish short fiction films, 12 percent of directors, 15 percent of screenwriters and 17 percent of producers identified themselves as "other".*

Women continually under-represented as directors for feature fiction films with high budgets

Gender distribution of *directors* among feature fiction films with production-funding 2014-2018 and 2019-2023 within different budget-categories*



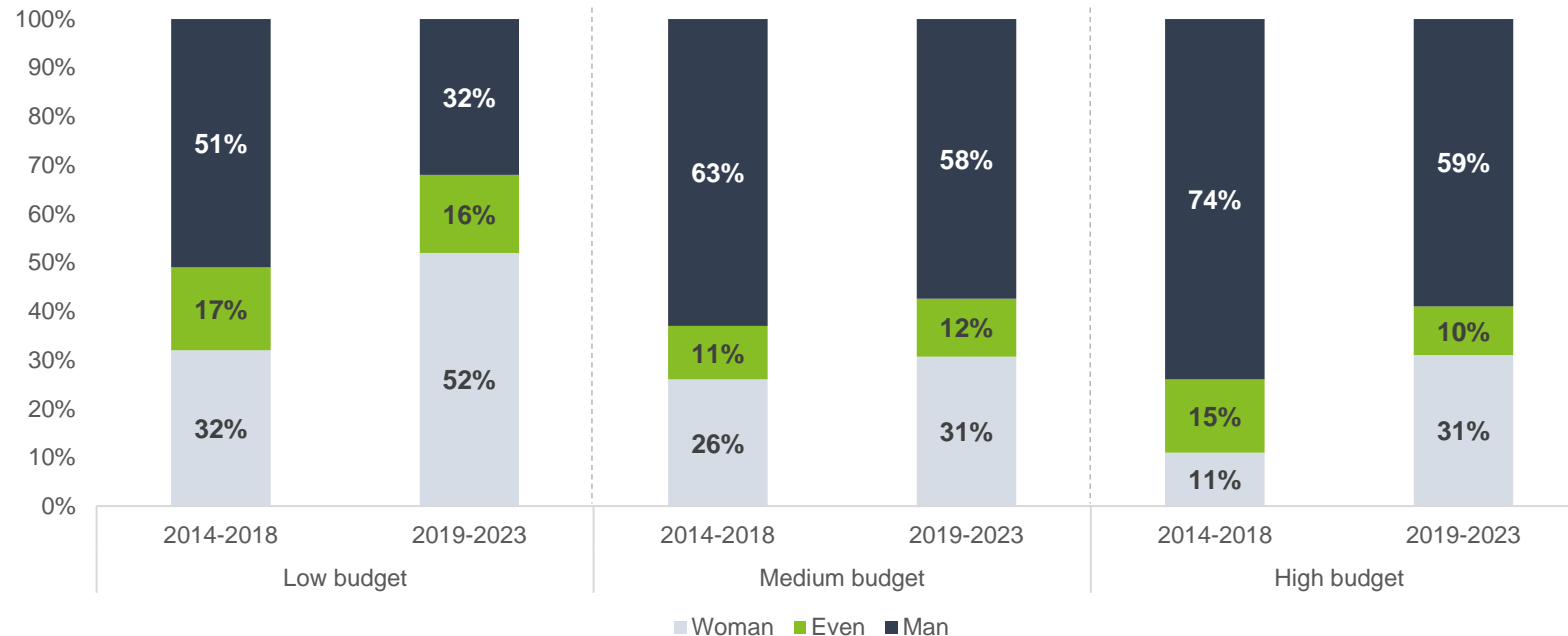
Generally, the gender distribution amongst directors of feature fiction films is even. However, when split into budget-categories the distribution changes.

Female directors are clearly under-represented amongst high-budgeted films (30 MSEK or more). Only every fourth funded high-budget film in the last ten years has had a female director.

*The gender distributions are based on filmprojects. "Man" or "Woman" means that a majority of persons with a specific role identifies with that gender. For example would two men and one woman in a project-role would be considered as "Man". "Even" means an even distribution of men and women in the project-role. Low budget = 0-20 MSEK, Medium = 20-30 MSEK, High 30+ MSEK.

The share of female screenwriters for feature fiction films has increased during the last five years

Gender distribution of *screenwriters* among feature fiction films with production-funding 2014-2018 and 2019-2023 within different budget-categories*



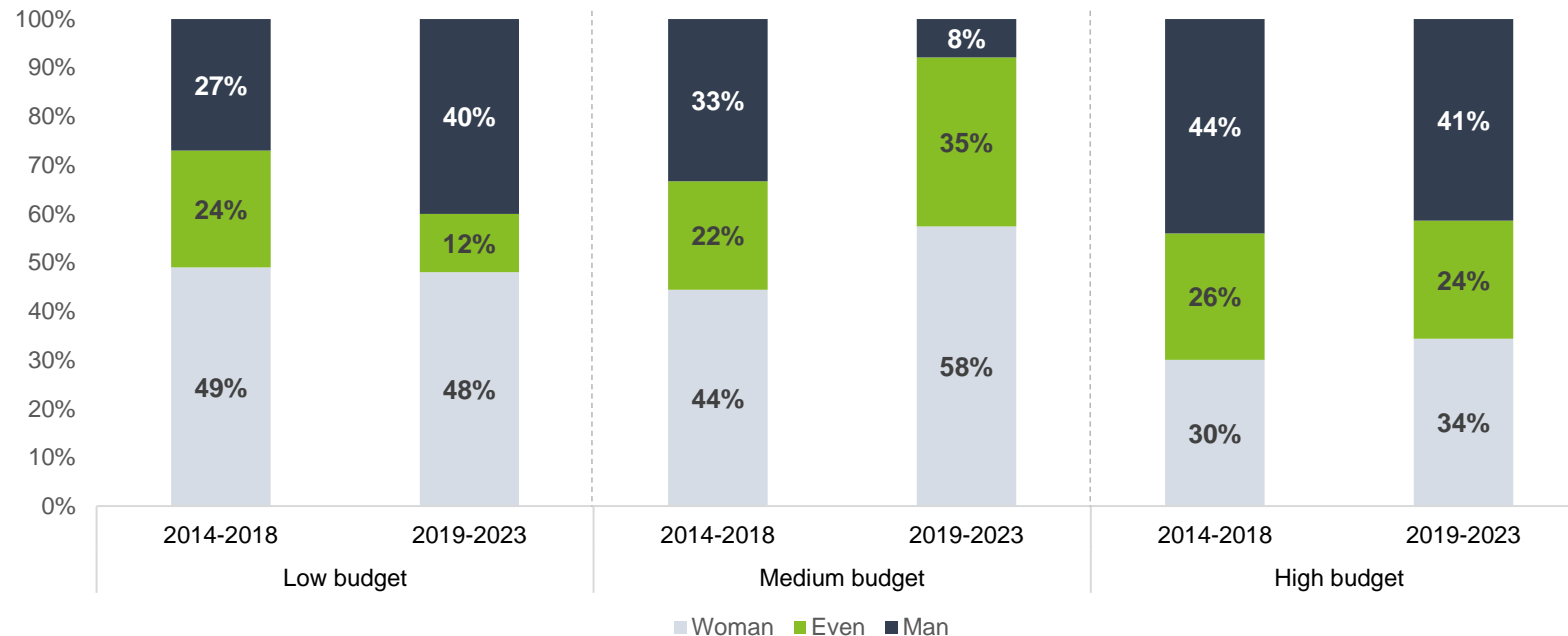
Looking at the two most recent five-year periods the share of female screenwriters has increased. The change has been most notable among low- and high-budget films, where the share increased with 20 percentage points.

Even with these changes it is still more common with male screenwriters in non-low-budget films.

*The gender distributions are based on filmprojects. "Man" or "Woman" means that a majority of persons with a specific role identifies with that gender. For example would two men and one woman in a project-role would be considered as "Man". "Even" means an even distribution of men and women in the project-role. Low budget = 0-20 MSEK, Medium = 20-30 MSEK, High 30+ MSEK.

Relatively even gender distribution among producers for feature fiction films with high budgets

Gender distribution of *producers* among feature fiction films with production-funding 2014-2018 and 2019-2023 within different budget-categories*



Amongst producers the gender distribution is relatively even within low- and high-budget films. For films with a medium-budget only 8 percent had mostly male producers.

*The gender distributions are based on filmprojects. "Man" or "Woman" means that a majority of persons with a specific role identifies with that gender. For example would two men and one woman in a project-role would be considered as "Man". "Even" means an even distribution of men and women in the project-role. Low budget = 0-20 MSEK, Medium = 20-30 MSEK, High 30+ MSEK.

Sources

Biografägareförbundet: Total admissions and admissions for Swedish film at cinemas in Sweden in 2023.

Company reports: Annual reports for companies in the film industry in Sweden.

DFI, NFI, SES: Government grants to the Film Institutes in Denmark, Norway and Finland and average budgets of funded films.

European Audiovisual Observatory (EAO): European cinema statistics.

Filmägarnas Kontrollbyrå: Number of admissions for the most watched films in Swedish cinemas in 2023.

IndieWire: "37 Days: That's the Average Window for Wide Releases in 2023, but It's Not the New Normal".

Lumiere Pro: International cinema attendance figures for Swedish films.

MMS Mediamätning i Skandinavien: Number of viewers for feature films on 14 Swedish TV channels.

MMS trend & tema: Reach VOD services in Sweden.

Moviezine: Digital and cinema release dates in Sweden.

Netflix: "What We Watched: A Netflix Engagement Report. Hours viewed from January to June 2023"

The Swedish Film Institute's audience surveys: conducted once or twice a year with 3,000 respondents, representative of the Swedish population between the ages of 15 and 74.

Usheru: Screenings of Swedish films in cinemas abroad.