



PRESS RELEASE

European Audiovisual Observatory, Council of Europe
Strasbourg, 14 May 2012

EU box office inches to record high in 2011 as European comedies provide welcome relief and 3D matures

- EU gross box office reached record high of EUR 6.4 billion, up 0.7% year-on-year
- Successful European comedies drove European market share from 25.2% to 28.5% in 2011
- New record for EU film production: 1 285 feature films (including feature documentaries) produced in 2011
- France and the UK lead Europe by number of digital screens
- Latest instalments of *Harry Potter*, *Pirates of the Caribbean* and *The Twilight Saga* topped the European Union charts.

EU gross box office inches to new record high of EUR 6.4 billion in 2011

2011 was a year of stabilisation at the European box office as the marked upward trend of GBO of the past two years slowed down significantly, resulting nevertheless in an overall year-on-year increase. Based on provisional data the European Audiovisual Observatory estimates that EU gross box office returns increased marginally by 0.7% from EUR 6.37 billion to EUR 6.4 billion, still the highest level on record. Cinema attendance remained stable with an estimated 962 million tickets sold.

Though the number of 3D releases as well as 3D screens increased notably in 2011, the format seemed to be maturing in some markets like the UK, where, despite an increasing number of 3D releases: from 28 in 2010 to 47 in 2011, 3D share dropped from 24% to 20% of total GBO. As a result 3D failed to further swell average ticket prices as had been the case in 2009 and 2010, with the EU-wide average ticket price increasing by only 0.5% to EUR 6.6.

On the level of individual European markets, 2011 cinema-going trends varied significantly, with admissions decreasing in 11 and increasing in 15 EU markets for which data were available, while GBO increased in 14 and decreased in 12 markets. Theatrical markets which performed particularly well were France (GBO record up 4.7%), the UK (+5.2%) and Germany (+4.1%) while Spain and Italy experienced a significant decline in both admissions as well as GBO.

More detailed information on European as well as international theatrical markets can be found in [FOCUS 2012 World Film Market Trends](#) prepared by the European Audiovisual Observatory for the Cannes Film Market.

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Table 1: GBO, admissions and national market share in European countries 2010 – 2011^e

Country	GBO (in EUR mio) ⁽¹⁾			Admissions (in mio)			National market share		Sources
	2010	2011 prov	2011/10	2010	2011 prov	2011/10	2010	2011 prov	
European Union member countries (EU 27)									
AT Austria	130,4	127,3	-2,4%	17,3	16,8	-3,1%	4,2%	3,6%	FMA / OFI
BE Belgium <i>est</i>	154,0	158,7	3,1%	22,3	22,8	2,2%	10,7%	10,7%	FCB / SGA
BG Bulgaria	16,5	18,7	13,6%	4,0	4,7	18,7%	8,8%	14,2%	National Film Center
CY Cyprus <i>est</i>	7,0	7,1	1,3%	0,9	0,9	2,5%	-	-	Min. Cult. / MEDIA Salles
CZ Czech Republic	59,1	49,2	-16,7%	13,5	10,8	-20,3%	34,8%	28,5%	Ministry of Culture / UFD
DE Germany	920,4	958,1	4,1%	126,6	129,6	2,3%	16,8%	21,8%	FFA
DK Denmark	133,6	125,8	-5,8%	13,0	12,4	-4,0%	22,3%	27,0%	Danmarks Statistics / DFI
EE Estonia	7,8	10,1	28,9%	2,1	2,5	15,9%	2,0%	7,0%	Estonian Film Foundation
ES Spain	662,3	630,0	-4,9%	101,6	95,6	-5,9%	12,7%	15,0%	ICAA / MEDIA Salles / OBS
FI Finland	66,0	65,5	-0,8%	7,6	7,1	-6,1%	27,5%	17,0%	Finnish Film Foundation
FR France	1 308,9	-	-	207,0	215,6	4,2%	35,7%	41,6%	CNC
GB United Kingdom	1 151,9	1 197,5	4,0%	169,2	171,6	1,4%	24,0%	36,2%	BFI / CAA
GR Greece <i>est</i>	99,4	93,0	-6,5%	11,7	10,8	-7,0%	8,6%	10,0%	MEDIA Salles / OBS
HU Hungary	45,5	41,3	-9,2%	11,0	9,5	-13,4%	7,2%	-	National Film Office
IE Ireland <i>est</i>	116,3	111,8	-3,8%	16,5	16,3	-0,8%	1,1%	4,0%	CSA / IFB
IT Italy <i>est</i>	772,8	695,4	-10,0%	120,6	111,1	-7,9%	31,9%	37,5%	ANICA / SIAE / Cinetel
LT Lithuania	9,8	10,7	9,2%	2,6	3,0	13,2%	3,6%	10,5%	Baltic Films
LU Luxembourg <i>est</i>	8,8	9,2	4,8%	1,2	1,3	5,4%	-	-	MEDIA Salles
LV Latvia	8,4	8,3	-0,6%	2,1	2,1	-2,1%	6,9%	4,5%	National Film Centre
NL The Netherlands	219,4	240,0	9,4%	28,2	30,4	8,0%	15,9%	22,4%	NFF / NVB & NVF
PL Poland	175,7	174,2	-0,9%	37,5	38,7	3,3%	14,4%	31,3%	boxoffice.pl
PT Portugal	82,2	79,9	-2,9%	16,6	15,7	-5,3%	1,6%	0,7%	ICA
RO Romania <i>est</i>	26,4	29,4	11,2%	6,5	7,2	11,2%	2,7%	1,4%	Centrul National al Cinematografiei
SE Sweden	154,1	169,0	9,6%	15,8	16,4	3,8%	20,8%	21,3%	Swedish Film Institute
SI Slovenia	12,8	13,0	1,3%	2,9	2,9	0,7%	6,7%	4,5%	Slovenian Film Centre
SK Slovakia	18,0	17,3	-4,3%	3,9	3,6	-7,8%	2,2%	10,1%	Slovak Film Institute
EU 27 - est. total	6 370	6 413	0,7%	963	962	-0,1%	-	-	European Audiovisual Observatory
Other European countries									
BA Bosnia Herzegovina	1,8	1,3	-26,1%	0,7	0,5	-31,3%	12,8%	0,9%	Sarajevo Film Festival
CH Switzerland	165,5	187,5	13,3%	14,8	14,9	0,9%	5,4%	5,1%	OFS
HR Croatia	12,0	13,2	10,3%	3,3	3,3	1,4%	0,8%	3,3%	CBS / Croatian Audiovisual Center
NO Norway	119,0	133,3	12,0%	11,0	11,7	5,8%	23,3%	24,5%	Film & Kino
RU Russian Federation ⁽²⁾	787,7	836,3	6,2%	165,5	165,2	-0,2%	14,5%	15,8%	RFBT / Nevafilm
TR Turkey	190,4	171,1	-10,1%	41,1	42,3	3,0%	52,9%	50,2%	ANTRAKT / OBS

⁽¹⁾ National currencies converted to EUR at average annual exchange rates.

⁽²⁾ Data refer to Russia and CIS (excluding Ukraine). 2011 data refer to calendar year while 2010 data refer to distribution year from December 2009 to November 2010.

Source: European Audiovisual Observatory

Comeback for European films

2011 saw European films claiming back market share which they had lost to US 3D blockbusters in 2009 and 2010. Based on provisional figures, estimated market share for European films in the EU climbed from 25.2% to 28.5% in 2011, back to the 'pre-3D' levels of 2007 and 2008. Market share for US films¹ on the other hand fell from 68.5% to an estimated 61.4%. This would be lowest level since 2001. Market share for European films produced in Europe with incoming US investment, such as *Harry Potter and the Deathly Hallows Part 2* and *The King's Speech*, increased from 5.0% to 8.4%.

The comeback of European films was mainly thanks to a series of local comedies such as *Intouchables* (FR), *The Inbetweeners* (UK), *Kokowääh* (DE) or *Che bella giornata* (IT), all of which performed extremely well, particularly on their home markets. As a result national market share increased in 15 of the 23 EU member states for which data were available, eight of which achieved the highest market share in the past five years. French films once more attracted the largest number of admissions among European films, accounting for 10.5% of total EU admissions. Backed by strong results in their home market, Italian films ranked second, taking 4.6%, followed by German and UK productions which accounted for 3.7% of total admissions in the EU in each case.

¹ Excluding EUR inc films, i.e. films produced in Europe with incoming investment from the US.

Table 2: EU market share by country of origin 2007 – 2011e

In % of total admissions.

Region		2007	2008	2009	2010 prov	2011 prov
US		62,4%	65,5%	67,1%	68,5%	61,4%
European films total		28,9%	28,4%	26,8%	25,2%	28,5%
EUR inc / US co-productions		6,8%	4,4%	4,0%	5,0%	8,4%
Others		1,8%	1,8%	2,1%	1,4%	1,6%
European films by country of origin ⁽¹⁾						
FR	France	8,4%	12,4%	8,8%	9,3%	10,5%
GB	United Kingdom	6,3%	2,3%	3,8%	2,8%	3,7%
IT	Italy	3,8%	3,6%	2,7%	3,8%	4,6%
DE	Germany	3,9%	3,6%	4,2%	3,1%	3,7%
Other EUR	Other European countries	6,6%	6,6%	7,2%	6,1%	6,0%

⁽¹⁾ excluding EUR inc films.

Source: European Audiovisual Observatory - LUMIERE Database

EU film production levels keep growing

EU production levels continued to grow to 1 285 feature films in 2011, 59 films more than in 2010 and a new record high. Growth was driven both by an increase in fiction, up 26 films, as well as feature documentaries, up 33 films. Total production volume splits into 915 fiction films (71% of total feature films) and at least 370 feature documentaries (29%). With over 200 national initiative feature films produced in 2011, France and the UK were the countries with the highest production levels in Europe.

Table 3: Number of feature films produced in the European Union 2007 - 2011e

	2007	2008	2009	2010	2011 prov
Feature fiction films ^{est (1)}	804	850	892	889	915
Feature documentaries ^{est (2)}	242	298	299	337	370
Total feature films ^{est (2)}	1 047	1 148	1 191	1 226	1 285

⁽¹⁾ May include feature documentaries in ES, IT, GR, HU.

⁽²⁾ May double count minority co-produced feature documentaries. No comprehensive data for feature documentaries available for: CY, ES, IT, GR, HU, LT, MT, RO.

Source: European Audiovisual Observatory

France and UK are Europe's largest digital cinema markets

Boosted by a unique legislative approach making distributor contributions mandatory, France made the most rapid progress in digitising its screen base and further strengthened its position as Europe's largest digital cinema market with a total of 3 656 digital screens by the end of 2011, by far the largest digital screen base in Europe. The UK and Germany followed at a distance with 2 724 and 2 303 digital screens, while there were around 1 500 digital screens in the remaining three major European theatrical markets of Spain, Italy and the Russian Federation.

With 72% of its total screens converted to digital at end 2011, the UK had the highest digital screen penetration among the six major European markets, ahead of France (67%). With 50% and 54% Germany and Russia followed at a distance but were well ahead of Spain and Italy where roll-out did not grow at comparable speed and only 39% and 38% of the total screen based digitised by the end of 2011.

Table 4: Top 5 countries by number of digital screens 2011

Rank	Country	Digital screens	Digital screen penetration ^e
1	France	3 656	67%
2	United Kingdom	2 724	72%
3	Germany	2 303	50%
4	Spain	1 545	38%
5	Italy	1 485	39%

Source: The European Digital Cinema Report²

² The *European Digital Cinema Report* is jointly published by the European Audiovisual Observatory and MEDIA Salles. Data refer uniquely to screens equipped with DLP Cinema or SXRD technology. The report can be ordered at http://www.obs.coe.int/oea_publ/market/european_digital_cinema.html

Harry Potter and Pirates of the Caribbean sequels top the European Union charts in 2011

As in many other world markets, sequels and spin-offs featured prominently in the 2011 European Union box office charts. Led by the latest instalments of *Harry Potter*, *Pirates of the Caribbean* and *The Twilight Saga*, a total of 13 sequels/ prequels/ spin-offs made it into the top 20. With over 37.5 million tickets sold *Harry Potter* became the best selling film in the EU, followed by *Pirates* (25.1 million) and *Breaking Dawn – Part 1* (22 million).

No doubt boosted by success at the Oscars, *The King's Speech* became the second most watched European film (19.8 million tickets sold) after *Harry Potter*, both UK inward investment films financed by a US studio. The most successful European films without incoming US investment were French comedies *Intouchables* and *Rien à déclarer*, attracting an audience of 15.7 million and 9.8 million viewers respectively across the EU, followed by UK comedies *Johnny English Reborn* and *The Inbetweeners Movie*.

Table 5: Top 20 films by admissions in the European Union in 2011 ^{prov}

Rank	Original title	Country of origin	Production Year	Director	Admissions
1	Harry Potter and the Deathly Hallows: Part 2	GB INC / US	2011	David Yates	37 513 719
2	Pirates of the Caribbean: On Stranger Tides	US	2011	Rob Marshall	25 133 294
3	The Twilight Saga: Breaking Dawn - Part 1	US	2011	Bill Condon	21 955 742
4	The King's Speech ⁽¹⁾	GB INC / US	2010	Tom Hooper	19 800 908
5	The Hangover Part II	US	2011	Todd Phillips	18 634 903
6	The Smurfs	US	2011	Raja Gosnell	16 888 963
7	Intouchables	FR	2011	Olivier Nakache, Eric Toledano	15 698 471
8	The Adventures of Tintin	US / NZ	2011	Steven Spielberg	15 422 354
9	Transformers: Dark of the Moon	US	2011	Michael Bay	14 861 739
10	Cars 2	US	2011	John Lasseter, Brad Lewis	14 430 415
11	Fast Five	US	2011	Justin Lin	14 347 838
12	Kung Fu Panda 2	US	2011	Jennifer Yuh	13 566 774
13	Black Swan	US	2010	Darren Aronofsky	12 516 245
14	Rise of the Planet of the Apes	US	2011	Rupert Wyatt	12 290 674
15	Puss in Boots	US	2011	Chris Miller	12 063 363
16	Rio	US	2011	Carlos Saldanha	11 408 106
17	Tangled ⁽²⁾	US	2010	Nathan Greno, Byron Howard	10 585 442
18	Rien à déclarer	FR / BE	2010	Dany Boon	9 834 928
19	Johnny English Reborn	GB / FR / US	2011	Oliver Parker	8 304 282
20	Thor	US	2011	Kenneth Branagh	7 909 467

⁽¹⁾ 144 866 admissions in EU in 2010. ⁽²⁾ 8 916 023 admissions in EU in 2010.

Source: European Audiovisual Observatory - LUMIERE Database

Table 6: Top 20 European films by admissions in the European Union in 2011 ^{prov}

Rank	Original title	Country of origin	Production Year	Director	Admissions
1	Harry Potter and the Deathly Hallows: Part 2	GB INC / US	2011	David Yates	37 513 719
2	The King's Speech ⁽¹⁾	GB INC / US	2010	Tom Hooper	19 800 908
3	Intouchables	FR	2011	Olivier Nakache, Eric Toledano	15 698 471
4	Rien à déclarer	FR / BE	2010	Dany Boon	9 834 928
5	Johnny English Reborn	GB / FR / US	2011	Oliver Parker	8 304 282
6	The Inbetweeners Movie	GB	2011	Ben Palmer	7 494 467
7	Che bella giornata	IT	2011	Gennaro Nunziante	6 830 405
8	Arthur Christmas	GB INC / US	2011	Sarah Smith, Barry Cook	5 766 538
9	Kokowääh	DE	2011	Til Schweiger	4 627 459
10	The Three Musketeers	DE / GB / FR	2011	Paul W.S. Anderson	3 582 181
11	One Day	GB INC / US	2011	Lone Scherfig	2 874 647
12	Les femmes du 6ème étage	FR	2010	Philippe Le Guay	2 659 519
13	Tinker Tailor Soldier Spy	GB / DE / FR	2011	Tomas Alfredson	2 651 531
14	La piel que habito	ES	2011	Pedro Almodóvar	2 642 027
15	Torrente 4	ES	2011	Santiago Segura	2 630 033
16	Immaturo	IT	2011	Paolo Genovese	2 600 849
17	Qualunquemente	IT	2011	Giulio Manfredonia	2 486 638
18	Harry Potter and the Deathly Hallows: Part 1 ⁽²⁾	GB INC / US	2010	David Yates	2 415 357
19	Listy do M.	PL	2011	Mitja Okorn	2 361 811
20	Polisse	FR	2011	Maiwenn	2 341 773

⁽¹⁾ 144 866 admissions in EU in 2010. ⁽²⁾ 31 275 121 admissions in EU in 2010.

Source: European Audiovisual Observatory - LUMIERE Database

Notes for Editors:

- Data have been collected with the collaboration of the EFARN (European Film Agency Research Network).
- All 2011 figures are provisional.

The European Audiovisual Observatory, Council of Europe

Set up in December 1992, the European Audiovisual Observatory's mission is to gather and distribute information on the audiovisual industry in Europe. The Observatory is a European public service body comprised of 37 member states and the European Union, represented by the European Commission. It operates within the legal framework of the Council of Europe and works alongside a number of partner and professional organisations from within the industry and with a network of correspondents. In addition to contributions to conferences, other major activities are the publication of a Yearbook, newsletters and reports, the compilation and management of databases and the provision of information through the Observatory's Internet site (<http://www.obs.coe.int>).

Market shares (Table 2)

The market shares shown in this figure are based on an analysis of results of films released in member states of the European Union for which admissions data for individual films are made available to the European Audiovisual Observatory. In order to draw up such market shares, a single 'country of origin' must be attributed to each film, an attribution that can prove difficult in the case of international productions. In these cases the Observatory's aim is to attribute a country of origin corresponding to the source of the majority financial input and/or creative control of the project. Since 2005 the Observatory has identified specifically films that have been produced in one or more European countries (or elsewhere) with US investment by using the reference 'inc' (incoming investment) in the country of origin attribution. It should be noted, however, that the availability of further information may occasionally lead to changes in the attribution of country of origin and that the origin of a film as attributed in the LUMIERE database may not always be identical with that indicated by national sources.

The provisional data on market shares in the European Union in 2011 shown in table 2 are based on the data on admissions to individual films as collected in the LUMIERE database on 20th April 2012. At this date the coverage rate of the database for admissions in the 23 European Union countries for which data is available was of around 88%. Due to various gaps in data collection and delivery in various countries, coverage of 100% of admissions is currently unachievable. For 2011, LUMIERE has still to include additional data on the following EU countries: Belgium, Bulgaria, Cyprus, Denmark, Spain, Finland, France, Greece, Ireland, Lithuania, Luxembourg, Malta, Netherlands, Romania and Slovakia.

Number of feature films produced in the European Union (Table 3)

Estimating the total volume of production of feature films in the European Union remains difficult, chiefly due to the risk of double counting of co-productions and to differing national methodologies for the collection of this data. Included in the total for the European Union are feature-length films intended for theatrical exploitation, excluding minority co-productions and US and foreign production in the United Kingdom. For some countries no separate data are available for feature fiction and feature documentary films.

European Union admissions rankings (Tables 5 and 6)

The pan-European film rankings shown in tables 5 and 6 are drawn up using information stored in the LUMIERE database as of 20th April 2012. This database on admissions to films released in Europe is available on-line and free-of-charge, and is the result of collaboration between the European Audiovisual Observatory and various specialised national sources as well as the MEDIA Programme of the European Union. LUMIERE provides country-by-country analysis of admissions for about 30 000 films in distribution in Europe since 1996. Partial 2011 data for 22 European countries is now available, including data for the major European Union markets, as well as data for the North American market. The rankings (Tables 5 and 6) shown in this press release are based on data from all European Union countries for which results have been received.

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This press release is available online:
http://www.obs.coe.int/about/oea/pr/mif2012_cinema.html

More detailed information can be found in
FOCUS 2012 World Film Market Trends

Compiled by the European Audiovisual Observatory and published by the Marché du Film.

http://www.obs.coe.int/oea_publ/market/focus.html