PRESS RELEASE

European Audiovisual Observatory, Council of Europe
Strasbourg, 5 May 2015

Box office up in the European Union in 2014 as European films break market share record

- EU gross box office increased marginally by 0.6% to EUR 6.32 billion in 2014
- Latest instalments of *The Hobbit and The Hunger Games* topped the EU charts
- Market share for European films reached record high of 33.6% (highest recorded since 1996)
- EU film production continued its rise to over 1 600 feature films
- Digital screen penetration almost complete: 92% of EU screens converted to digital by end 2014

EU gross box office slightly up in 2014

Based on provisional data the European Audiovisual Observatory estimates that gross box office takings in the 28 EU Member States increased marginally to EUR 6.32 billion in 2014, up EUR 40 million on 2013. This is 0.6% higher than the previous year but still represents the second lowest level in the past five years. As in 2013 GBO growth was proportional to the change in underlying admissions which grew modestly by 0.7% to an estimated 911 million tickets sold, around 6.5 million more than in 2013. This indicates that the pan-European average ticket price – measured in Euros – has remained more or less stable at EUR 6.9 since 2012.

Measured in local currencies GBO increased in a total of 14 and decreased in 13 out of the 27 EU member states for which data are available. The small growth in cumulative EU box office (in EUR) was primarily ensured by strong year-on-year performances in France, Spain (+EUR 15 million. +3.0%) and Poland (+EUR 15 million, +9.7%) as well as the appreciation of the British Pound which led to an increase in the Euro value of UK GBO, despite a 2.3% decrease when measured in GBP. At the other end of the spectrum, the largest declines in GBO – in absolute terms – were registered in Italy (-EUR 46 million, -7.1%) and Germany (-EUR 43 million, -4.2%).

Outside of the EU, the Russian Federation confirmed its position as the second largest European market in terms of admissions with 175 million tickets sold and a GBO of RUB 43.3 billion, a 2.4% increase on 2013. While Russian box office growth seems to have somewhat levelled out, Turkey continued its impressive growth trend of recent years with admissions jumping to 61.4 million, up 22% from 2013 and GBO increasing to TRY 655 million (+30%), the highest level in the past few decades. Both markets however faced sharp declines in their currencies in 2014, so that GBO measured in EUR actually declined by 14% to EUR 862 million in the case of Russia and by 2.5% to EUR 189 million in the case of Turkey.

The Hobbit, The Hunger Games and *How to Train Your Dragon* sequels top the European Union charts in 2014

As in previous years, sequels and spin-offs featured prominently in the 2014 European Union box office charts. Led by *The Hobbit: The Battle of the Five Armies* (22.7 mio. admissions), *The Hunger Games: Mockingjay – Part 1* (20.1 mio.) and *How to Train Your Dragon 2* (17.5 mio.) a total of nine sequels or spin-offs made it into the top 20, five of them into the top 10.

French culture clash comedy *Qu'est-ce qu'on a fait au Bon Dieu (Serial (Bad) Weddings)* and Luc Besson's sci-fi thriller *Lucy* stood out among European films, selling 17.1 and 15.2 million tickets in the EU respectively. Other exceptionally successful films include the Spanish comedy *Ocho apellidos vascos (Spanish Affair)*, which became the highest grossing Spanish film of all time, and British family comedy *Paddington,* both of which made it into the list of the 25 top grossing films in 2014.

It is interesting to note that, just as in 2013, the top blockbusters attracted significantly fewer cinema-goers than in the previous years, if one compares them, for example, with the 42.7 million admissions for *Skyfall* (2012) or 38.0 million for *Harry Potter and the Deathly Hollows: Part 2* (2011) and 51.9 million for *Avatar* (2010). Cumulative admissions to European films on the other hand increased and became the main driver behind the overall growth in cinema attendance in the EU.

Table 1: GBO, admissions and national market share in European countries 2013 – 2014 prov

Country		Admissions (in million)			GBO (in million)				National market share [1]		Sources
		2013	2014 prov	Change %	Currency	2013	2014 prov	Change %	2013	2014 prov	
European Union member countries (EU 28)											
AT	Austria est	15,2	14,1	-7,1%	EUR	124,6	117,9	-5,4%	4,2%	4,6%	ÖFI
BE	Belgium est	20,9	21,6	3,3%	EUR	154,7	158,4	2,4%	~	14,0%	VAF / CCA
BG	Bulgaria	4,8	4,9	2,3%	BGN	39,8	41,1	3,2%	0,9%	3,5%	National Film Center
CY	Cyprus est	0,7	0,7	2,1%	EUR	5,0	5,1	1,8%	0,1%	~	Min. Cult. / MEDIA Salles
CZ	Czech Republic	11,1	11,6	4,5%	CZK	1 424,2	1 462,7	2,7%	24,2%	23,8%	Czech State Cinematography Fund
DE	Germany	129,7	121,7	-6,1%	EUR	1 023,0	979,7	-4,2%	26,2%	26,7%	FFA
DK	Denmark	12,9	12,2	-5,2%	DKK	1 025,1	991,7	-3,3%	30,2%	27,3%	Danish Film Institute
EE	Estonia	2,6	2,6	1,6%	EUR	11,8	12,8	8,0%	5,9%	4,7%	Estonian Film Institute
ES	Spain est	77,0	87,4	13,6%	EUR	507,2	522,5	3,0%	13,5%	25,5%	ICAA
FI	Finland	7,8	7,3	-6,4%	EUR	76,0	71,6	-5,8%	23,4%	28,1%	Finnish Film Foundation
FR	France	193,6	208,4	7,7%	EUR	1 250,0	n.c.	~	33,8%	44,0%	CNC
GB [2]	United Kingdom	165,5	157,5	-4,9%	GBP	1 083,0	1 058,0	-2,3%	22,2%	26,0%	BFI / CAA / Rentrak
GR	Greece est	9,2	9,0	-2,6%	EUR	59,3	58,0	-2,2%	7,2%	3,5%	Greek Film Center / Media Salles
HR	Croatia	4,2	3,8	-9,7%	HRK	121,0	110,6	-8,6%	11,1%	2,5%	Croatian Audiovisual Center
HU	Hungary est	10,1	11,0	8,4%	HUF	13 490,0	14 601,6	8,2%	1.3%	3.7%	NMHH
IE	Ireland est	14,7	14,4	n.c.	EUR	102,8	100,4	n.c.	0,9%	7,1%	Irish Film Board
IT	Italy est	105,7	99,3	-6,1%	EUR	646,3	600,5	-7,1%	31,0%	27,8%	Cinetel / SIAE / OBS
LT	Lithuania	3,3	3,2	-0,7%	EUR	13,1	14,4	9,8%	16,5%	23,1%	Lithuanian Film Centre
LU	Luxembourg est	1,2	1,1	-6,5%	EUR	9,1	8,5	-6,1%	~	1,0%	Media Salles
LV	Latvia	2,4	2,3	-2,8%	LVL	10,3	10,2	-1,3%	6,0%	7,6%	National Film Centre
MT	Malta est	0,7	n.c.	~	EUR	4,0	n.c.	~	3,6%	~	National Statistics Office
NL	Netherlands	30,8	30,8	-0,2%	EUR	249,5	249,9	0,1%	20,6%	20,8%	NFF / MaccsBox - NVB & NVF
PL	Poland	36,3	40,5	11,4%	PLN	665,1	727,8	9,4%	20,3%	27,1%	Polish Film Institute / boxoffice.pl
PT	Portugal	12,5	12,1	-3,7%	EUR	65,5	62,7	-4,2%	3,4%	4,8%	ICA
RO	Romania	9,0	10,2	12,4%	RON	160,5	185,2	15,4%	2,8%	2,2%	Centrul National al Cinematografiei
SE	Sweden	16,6	16,3	-1,8%	SEK	1 644,1	1 654,0	0,6%	26,7%	26,4%	Swedish Film Institute
SI	Slovenia	2,3	1,9	-17,4%	EUR	11,1	9,5	-13,9%	10,9%	5,7%	Slovenian Film Center
SK	Slovakia	3,7	4,1	10,8%	EUR	19,0	20,9	9,8%	4,4%	5,7%	UFD / Slovak Film Institute
EU 28 Total est		**905**	**911**	**0,7%**	**EUR**	**6 282**	**6 322**	**0,6%**	**~**	**~**	**European Audiovisual Observatory**
Other European countries											
BA	Bosnia Herzegovina	0,9	0,9	-3,4%	BAM	4,9	4,5	-8,3%	0,6%	1,0%	Sarajevo Film Festival
CH	Switzerland	13,7	12,9	-5,4%	CHF	212,9	201,0	-5,6%	4,8%	6,2%	Office fédéral de la statistique
IS	Iceland est	1,4	1,3	-2,3%	ISK	1 491,6	1 485,6	-0,4%	9,1%	3,1%	Icelandic Film Centre
ME	Montenegro	0,2	0,3	~	EUR	0,8	1,0	~	n.c.	0,0%	Min.Cult.
MK	FYR of Macedonia	0,1	0,4	359,7%	MKD	7,6	64,0	744,7%	26,6%	n.c.	Macedonian Film Agency
NO	Norway	11,8	11,1	-6,1%	NOK	1 095,2	1 082,1	-1,2%	17,9%	22,8%	Film & Kino
RU	Russian Federation	176,4	176,1	-0,2%	RUB	42 298,2	43 332,0	2,4%	15,1%	18,2%	Nevafilm / Russian Film Business
TR	Turkey	50,4	61,4	21,8%	TRY	505,3	655,4	29,7%	47,0%	58,0%	Antrakt

1) National market share include minority co-productions with the exception of DK and NO.

2) National market share based on GBO up to and including 18 January 2015.

Source: European Audiovisual Observatory

Table 2: Top 20 films by admissions in the European Union in 2014 prov

Rank	Original title	Country of origin	Production Year	Director	Admissions prov
1	The Hobbit: The Battle of the Five Armies	US / NZ INC	2014	Peter Jackson	22 659 287
2	The Hunger Games: Mockingjay - Part 1	US	2014	Francis Lawrence	20 097 495
3	How to Train Your Dragon 2	US	2014	Dean DeBlois	17 500 829
4	The Wolf of Wall Street (1)	US	2013	Martin Scorsese	17 139 295
5	Qu'est-ce qu'on a fait au Bon Dieu? (Serial (Bad) Weddings)	FR	2014	Philippe de Chauveron	17 098 008
6	Lucy	FR	2014	Luc Besson	15 202 930
7	Dawn of the Planet of the Apes	US	2014	Matt Reeves	14 617 327
8	Rio 2	US	2014	Carlos Saldanha	13 800 211
9	Maleficent	US / GB INC	2014	Robert Stromberg	13 753 766
10	Interstellar	US / GB	2014	Christopher Nolan	13 565 694
11	Guardians of the Galaxy	US / GB INC	2014	James Gunn	13 453 075
12	Transformers: Age of Extinction	US / CN	2014	Michael Bay	12 981 510
13	X-Men: Days of Future Past	US	2014	Bryan Singer	12 587 855
14	The Lego Movie	US / AU / DK	2014	Phil Lord, Christopher Miller	11 969 537
15	The Amazing Spider-Man 2	US	2014	Marc Webb	11 238 153
16	Gone Girl	US	2014	David Fincher	10 133 944
17	Captain America: The Winter Soldier	US	2014	Anthony Russo, Joe Russo	9 548 599
18	Ocho apellidos vascos (Spanish Affair)	ES	2014	Emilio Martínez Lázaro	9 322 010
19	Frozen (2)	US	2013	Chris Buck, Jennifer Lee	9 078 360
20	12 Years a Slave	US / GB	2013	Steve McQueen	8 865 074

(1) 217 374 admissions in the EU in 2013.
(2) 18 626 680 admissions in the EU in 2013.
Note: 'inc' refers to films produced with incoming investment from the US.

Source: European Audiovisual Observatory / LUMIERE

Table 3: Top 20 European films by admissions in the European Union in 2014 prov

Rank	Original title	Country of origin	Production Year	Director	Admissions prov
1	Qu'est-ce qu'on a fait au Bon Dieu? (Serial (Bad) Weddings)	FR	2014	Philippe de Chauveron	17 098 008
2	Lucy	FR	2014	Luc Besson	15 202 930
3	Ocho apellidos vascos (Spanish Affair)	ES	2014	Emilio Martínez Lázaro	9 322 010
4	Paddington	GB / FR	2014	Paul King	7 703 409
5	Supercondriaque (Superchondriac)	FR / BE	2014	Dany Boon	5 892 379
6	The Inbetweeners Movie 2	GB	2014	Damon Beesley, Iain Morris	5 011 123
7	Les vacances du petit Nicolas	FR	2014	Laurent Tirard	3 685 470
8	Hundraåringen som klev ut genom fönstret och försvann (1)	SE	2013	Felix Herngren	3 654 734
9	The Physician (2)	DE	2013	Philipp Stölzl	3 636 062
10	Samba	FR	2014	Olivier Nakache, Eric Toledano	3 497 531
11	The House of Magic (3)	BE	2013	Jeremy Degruson, Ben Stassen	3 160 193
12	Beauty and the Beast	FR / DE	2014	Christophe Gans	3 094 170
13	Philomena (4)	GB / US / FR	2013	Stephen Frears	2 944 317
14	El Niño	ES	2014	Daniel Monzón	2 678 463
15	Babysitting	FR	2014	Nicolas Benamou, Philippe Lacheau	2 534 575
16	Les trois frères, le retour	FR	2014	Didier Bourdon, Pascal Légitimus, Bernard Campan	2 375 936
17	Vaterfreuden (Joy of Fatherhood)	DE	2014	Matthias Schweighöfer, Torsten Künstler	2 373 401
18	Astérix: Le domaine des dieux	FR	2014	Louis Clichy, Alexandre Astier	2 332 094
19	La famille Bélier (The Bélier Family)	FR / BE	2014	Eric Lartigau	2 298 391
20	Bogowie (Gods)	PL	2014	Lukasz Palkowski	2 187 768

(1) 484 415 admissions in the EU in 2013.
(2) 1 399 196 admissions in the EU in 2013.
(3) 448 650 admissions in the EU in 2013.
(4) 2 200 849 admissions in the EU in 2013.

Source: European Audiovisual Observatory /LUMIERE

Market share for European films reaches record high

Admissions growth was driven primarily by the success of European films while several US blockbusters did not meet expectations and caused the market share for US films to drop from its record level of 69.5% in 2013 to 63.1%. The estimated market share for European films in the EU on the other hand leapt from 26.2% to 33.4%. This is the highest level since the Observatory started to calculate European market share in 1996. This figure excludes European films produced in Europe with incoming US investment which registered their weakest market share in recent history taking just over 0.3% of total admissions.

Table 4: EU market share by country of origin 2010 – 2014

In % of total admissions. Provisional estimates.

Region of origin	2010	2011	2012	2013	2014 prov
US	68.2%	61.6%	62.3%	69.5%	63.1%
EUR inc / US	5.0%	8.1%	6.9%	1.1%	0.3%
Europe	25.4%	28.5%	29.3%	26.2%	33.6%
Other	1.4%	1.8%	1.5%	3.2%	3.0%

Source: European Audiovisual Observatory / LUMIERE

EU film production volume continues to grow

EU production levels have been steadily increasing over the past decades. This trend continued in 2014, as the estimated number of European feature film productions increased from 1 587 to 1 603 films. This represents yet another record high and breaks down into an estimated 1 118 feature fiction films and 485 feature documentaries. About 32% of European feature films were produced as co-productions while 68% were national productions.

Table 5: Number of feature films produced in the European Union 2010 – 2014

Provisional estimates.

Type of production	2010	2011	2012	2013	2014 prov
Feature fiction films est (1)	1 072	1 073	1 092	1 110	1 118
Feature documentaries est (1)	427	453	462	477	485
Total feature films est (1)	**1 499**	**1 526**	**1 554**	**1 587**	**1 603**

(1) Restated data series. May double count minority co-produced feature documentaries.

Source: European Audiovisual Observatory / LUMIERE

92% of EU screens converted to digital

According to figures provided by MEDIA Salles a total of 1 858 additional EU screens converted to digital projection systems in 2014, bringing the total to 27 899 digital screens. This means that by the end of 2014 about 92% of the EU's total screen base had been digitised. Only five Member States registered digital screen penetration rates below 70%, including the Czech Republic (53%), Greece (38%) and the Baltic States.

Table 6: Digital Screens in the European Union 2010 – 2014

Provisional estimates.

	2010	2011	2012	2013	2014 prov
New digital screens	4 640	7 041	5 860	4 355	1 858
Total digital screens as of Dec 31	8 785	15 826	21 686	26 041	27 899
Digital screen penetration as of Dec 31 est	14%	54%	72%	87%	92%

Source: MEDIA Salles, European Audiovisual Observatory

More detailed information on European as well as international theatrical markets can be found in *FOCUS 2015 World Film Market Trends* prepared by the European Audiovisual Observatory for the Cannes Film Market.

Notes for Editors:

- Data have been collected with the collaboration of the EFARN (European Film Agency Research Network).
- All 2014 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 40 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).

European Union admissions rankings (Tables 2 and 3)

The pan-European film rankings shown in tables 2 and 3 are based on data from all European Union countries for which results have been stored in the LUMIERE database as of 20th April 2015. 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 35 500 films in distribution in Europe since 1996. Partial 2014 data for 24 European countries is now available, including data for the major European Union markets, as well as data for the North American market.

Market shares (Table 4)

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 2014 shown in table 4 are based on the data on admissions to individual films as collected in the LUMIERE database on 20th April 2015. At this date the coverage rate of the database for admissions in the 24 European Union countries for which data is available was of around 95%. Due to various gaps in data collection and delivery in various countries, coverage of 100% of admissions is currently unachievable.

Number of feature films produced in the European Union (Table 5)

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.

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This press release is available online:
http://www.obs.coe.int/press/individual-press-releases/2015

More detailed information can be found in

FOCUS 2015 World Film Market Trends

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

Our FOCUS publication will be on sale via our website as of 13 May 2015
(see: http://www.obs.coe.int/shop/focus).
We will also be selling it on our stand in Cannes.