PRESS RELEASE

European Audiovisual Observatory, Council of Europe
Strasbourg, 4 May 2016

Box office hit record high in the European Union in 2015

- EU gross box office reached a record high of around EUR 7.3 billion in 2015
- *Star Wars: The Force Awakens* and *Minions* topped the EU charts
- Market share for European films dropped to 26.1%
- EU film production rose again to over 1 600 feature films
- Digital screen penetration in the EU remained at 92%

2015 saw EU break gross box office record

Based on provisional data the European Audiovisual Observatory estimates that cumulative GBO in the 28 EU Member States rocketed to around EUR 7.3 billion. This is 16% higher than the previous year and represents – not adjusted for inflation - the highest level on record. GBO growth was driven both by an increase in admissions as well as rising ticket prices: Admissions increased by 7.4% to 976 million tickets sold. This is 67.5 million more than in 2014 and represents the second highest level registered in the EU in the past ten years. Only in 2009 did cinemas in the EU sell more tickets boosted by *Avatar* and the novelty factor of 3D. The estimated pan-European average ticket price – measured in euros – increased from EUR 7.00 to around EUR 7.50. It is remarkable to note that in 2015 GBO – measured in local currencies – increased in all 26 EU markets for which provisional data are available. This represents the most homogenous growth trend across territories observed in at least the past ten years. The growth in cumulative EU gross box office was particularly boosted by the strong year-on-year performances in the UK and Ireland which registered – also thanks to an appreciation of the British Pound against the Euro – an increase of almost EUR 400 million (+30%) as well as Germany (+EUR 187 million, +19%).

Outside the EU, the Russian Federation confirmed its position as the second largest European market in terms of admissions with 174 million tickets sold and a GBO of RUB 44.1 billion, a 1.9% increase on 2014. As in Russia box office growth in Turkey somewhat levelled out, with admissions falling slightly by 1.5% to 60.5 million and GBO increasing to TRY 681 million (+4%), the highest level in the past few decades.

Box office growth driven by US studio titles

In contrast to 2014, admissions growth was driven primarily by the strong performances of a number of US studio titles which accounted for 18 out of the top 20 performing films in the EU in 2015. The charts were topped by *Star Wars: The Force Awakens* (39.8 million admissions), *Minions* (39.5 million), *Spectre* (37.9 million) and *Jurassic World* (30.4 million). It is interesting to note that all of these four top films sold more than 30 million tickets in the EU in 2015 while not a single film managed to reach this benchmark in 2013 or 2014. As in previous years box office was dominated by sequels / prequels or spin-offs which accounted for nine out of the top 10 titles. On a cumulative basis, US films took an estimated market share of 64%, slightly up on 2014's 63.2%. An even bigger boost to box office growth however came from the renewed strength of UK incoming investment films such as *Spectre* or *Kingsman: The Secret Service* as the market share of European films produced in Europe with incoming US investment (EUR inc) rose from 0.4% to 7.3%.

Admissions for European films on the other hand declined causing European market share in the EU to drop from its exceptional 2014 record level of 33.5% to an estimated 26.1% as only two European films made it into the top 20, French action thriller *Taken 3* (8.9 million admissions) and German comedy *Fack ju Göhte 2* (8.6 million). Nevertheless, European films continued to perform well on several national markets - often thanks to the success of a couple of local blockbusters – including France (35.2%), Finland (29.9%), Denmark (29.8%) or Germany (27.5%). Boosted by the success of UK qualifying films such as *Star Wars* or *Spectre,* UK films captured a record market share of 44.5% making the UK the EU market with the highest national market share in 2015. UK independent films as defined by the BFI (i.e. excluding films with US studio backing) accounted for 10.6%.

Table 1: GBO, admissions and national market share in European countries 2014 – 2015 [prov]

Country		Admissions (in million)			GBO (in million)				National market share [(1)]		Sources
		2014	2015 prov	Change %	Currency	2014	2015 prov	Change %	2014	2015 prov	
European Union member countries (EU 28)											
AT	Austria [est]	14.3	15.9	11.4%	EUR	117.9	136.9	16.1%	4.6%	5.3%	ÖFI
BE	Belgium est	20.4	21.1	3.5%	EUR	157.7	166.3	5.4%	14.0%	10.0%	SPF Economie / Cinedata / FCB / VFDB
BG	Bulgaria	4.9	5.3	8.8%	BGN	41.1	45.9	11.6%	3.5%	1.8%	National Film Center
CY	Cyprus [est]	0.7	0.7	3.0%	EUR	5.1	5.2	1.5%	9.1%	~	Min. Cult.
CZ	Czech Republic	11.6	13.0	12.1%	CZK	1 462.7	1 669.2	14.1%	23.8%	18.4%	Czech State Cinematography Fund
DE	Germany	121.7	139.2	14.4%	EUR	979.7	1 167.1	19.1%	26.7%	27.5%	FFA
DK	Denmark	11.9	13.8	15.7%	DKK	993.8	1 175.5	18.3%	27.4%	29.8%	Statistics Denmark / DFI / OBS
EE	Estonia	2.6	3.1	19.0%	EUR	12.8	15.6	22.1%	4.7%	11.3%	Estonian Film Institute
ES	Spain [est]	87.4	94.6	8.2%	EUR	522.5	572.7	9.6%	25.5%	19.2%	ICAA
FI	Finland	7.3	8.7	19.3%	EUR	71.8	89.7	25.0%	28.1%	29.9%	Finnish Film Foundation
FR	France	209.0	206.1	-1.4%	EUR	1 333.3	~	~	44.4%	35.2%	CNC
GB	United Kingdom [(2)]	157.5	171.9	9.2%	GBP	1 058.0	1 240.0	17.2%	26.8%	44.5%	BFI / CAA / comScore
GR	Greece [est]	9.0	9.8	9.3%	EUR	58.0	63.4	9.3%	4.6%	8.4%	Greek Film Center
HR	Croatia	3.8	3.9	4.7%	HRK	110.6	114.4	3.4%	2.5%	1.9%	Croatian Audiovisual Center
HU	Hungary [est]	11.0	13.0	18.4%	HUF	14 601.6	17 537.7	20.1%	3.7%	4.2%	National Film Office
IE	Ireland [est]	14.4	15.2	5.6%	EUR	100.4	105.4	4.9%	7.0%	4.1%	MEDIA LIVE / Irish Film Board
IT	Italy [est]	98.3	107.0	8.9%	EUR	600.1	665.0	10.8%	27.8%	21.3%	Cinetel / SIAE / ANICA / OBS
LT	Lithuania	3.2	3.3	3.0%	EUR	14.4	15.4	7.1%	23.1%	13.8%	Lithuanian Film Centre
LU	Luxembourg [est]	1.1	1.3	15.0%	EUR	8.5	9.6	12.3%	1.0%	~	MEDIA Salles
LV	Latvia	2.3	2.4	2.0%	LVL	10.2	11.2	9.7%	7.6%	4.4%	National Film Centre
MT	Malta [est]	0.7	~	~	EUR	3.7	~	~	4.2%	~	National Statistics Office
NL	Netherlands	30.8	33.0	7.1%	EUR	249.9	275.7	10.3%	20.9%	18.7%	NFF / MaccsBox - NVB & NVF
PL	Poland	40.5	44.7	10.5%	PLN	727.8	822.9	13.1%	27.5%	18.7%	Polish Film Institute / boxoffice.pl
PT	Portugal	12.1	14.6	20.5%	EUR	62.7	75.0	19.6%	4.8%	6.5%	ICA
RO	Romania	10.2	11.2	9.8%	RON	185.2	206.9	11.7%	2.2%	1.9%	Centrul National al Cinematografiei
SE	Sweden	16.3	17.0	4.7%	SEK	1 654.0	1 817.5	9.9%	26.4%	20.7%	Swedish Film Institute
SI	Slovenia	1.9	2.1	8.6%	EUR	9.5	10.3	8.4%	5.7%	2.4%	Slovenian Film Center
SK	Slovak Republic	4.1	4.6	11.8%	EUR	20.9	23.7	13.7%	5.7%	6.7%	UFD / Slovak Film Institute
EU 28 Total [est]		909	976	7.4%	EUR	6 322	7 347	16%	~	~	European Audiovisual Observatory
Other European countries											
AM	Armenia	~	0.2	~	AMD	~	0.8	~	~	5.0%	National Cinema Centre of Armenia
BA	Bosnia and Herzegovina	0.9	0.9	2.7%	BAM	4.5	4.6	2.6%	1.0%	1.0%	Sarajevo Film Festival
CH	Switzerland	12.9	14.4	11.3%	CHF	201.0	224.0	11.4%	6.2%	7.7%	Office fédéral de la statistique
IS	Iceland [est]	1.4	1.4	2.8%	ISK	1 486.8	1 552.8	4.4%	10.0%	4.6%	HI / Icelandic Film Centre / OBS
ME	Montenegro	0.3	~	~	EUR	1.0	~	~	~	~	Min.Cult.
MK	FYR of Macedonia [est]	0.4	~	~	MKD	64.0	~	~	9.8%	~	Macedonian Film Agency
NO	Norway	11.1	12.0	8.6%	NOK	1 082.1	1 231.4	13.8%	24.4%	20.5%	Film & Kino
RU	Russian Federation	176.0	174.1	-1.1%	RUB	43 316.7	44 125.0	1.9%	18.7%	17.4%	Nevafilm / Film Business Today
TR	Turkey	61.4	60.5	-1.5%	TRY	655.4	681.4	4.0%	59.3%	56.8%	Antrakt

1) National market share include minority co-productions with the exception of DK.

2) National market share based on GBO up to and including 17 January 2016.

Source: European Audiovisual Observatory

Table 2: Top 20 films by admissions in the European Union in 2015 prov (1)

Rank	Original title	Country of origin	Production Year	Director	Admissions prov
1	Star Wars: Episode VII - The Force Awakens	US	2015	J.J. Abrams	39 791 061
2	Minions	US	2015	Kyle Balda, Pierre Coffin	39 429 207
3	Spectre	GB INC / US	2015	Sam Mendes	37 866 125
4	Jurassic World	US / CN	2015	Colin Trevorrow	30 383 250
5	Fifty Shades of Grey	US	2015	Sam Taylor-Johnson	27 254 619
6	Furious Seven	US / JP / CN	2015	James Wan	26 861 698
7	Inside Out	US	2015	Pete Docter, Ronnie Del Carmen	26 798 394
8	Avengers: Age of Ultron	US	2015	Joss Whedon	22 320 675
9	The Hunger Games: Mockingjay - Part 2	US / DE	2015	Francis Lawrence	17 019 151
10	Hotel Transylvania 2	US	2015	Genndy Tartakovsky	15 010 178
11	The Martian	US / GB	2015	Ridley Scott	13 674 245
12	American Sniper	US	2014	Clint Eastwood	12 494 177
13	Mission: Impossible - Rogue Nation	US / CN / HK	2015	Christopher McQuarrie	11 790 016
14	Cinderella	US / GB	2015	Kenneth Branagh	11 620 306
15	Big Hero 6 (2)	US	2014	Chris Williams, Don Hall	9 594 697
16	Home	US	2015	Tim Johnson	9 487 157
17	Taken 3	FR	2014	Olivier Megaton	8 937 358
18	Fack ju Göhte 2	DE	2015	Bora Dagtekin	8 640 137
19	The Good Dinosaur	US	2015	Peter Sohn	8 497 787
20	Mad Max: Fury Road	AU INC / US	2015	George Miller	8 472 489

(1) Provisional rankings based on the analysis of partially fragmentary data from 25 EU member states representing 90% of all admissions in the EU.
(2) 2 442 914 admissions in the EU in 2014.
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 2015 (incl. "EUR inc") prov (1)

Rank	Original title	Country of origin	Production Year	Director	Admissions prov
1	Spectre	GB INC / US	2015	Sam Mendes	37 866 125
2	Taken 3	FR	2014	Olivier Megaton	8 937 358
3	Fack ju Göhte 2	DE	2015	Bora Dagtekin	8 640 137
4	Kingsman: The Secret Service	GB INC / US	2014	Matthew Vaughn	7 337 579
5	Shaun the Sheep Movie	GB	2015	Mark Burton, Richard Starzak	6 568 812
6	Honig im Kopf (2)	DE	2014	Til Schweiger, Lars Gmehling	6 549 967
7	The Theory of Everything (3)	GB INC / US	2014	James Marsh	6 517 084
8	Ocho apellidos catalanes	ES	2015	Emilio Martínez Lázaro	5 134 311
9	Paddington (4)	GB / FR	2014	Paul King	4 802 545
10	Les nouvelles aventures d'Aladin	FR / BE	2015	Arthur Benzaquen	4 377 528
11	Les profs 2	FR	2015	Pierre-François Martin-Laval	3 494 230
12	The Little Prince	FR / IT	2015	Mark Osborne	3 492 725
13	The Second Best Exotic Marigold Hotel	GB INC / US	2015	John Madden	3 123 327
14	Papa ou maman	FR / BE	2015	Martin Bourboulon	3 038 717
15	Legend	GB INC / US / FR	2015	Brian Helgeland	2 896 794
16	Listy do M. 2	PL	2015	Maciej Dejczer	2 874 420
17	Er ist wieder da	DE	2015	David Wnendt	2 712 179
18	Pourquoi j'ai pas mangé mon père	FR / IT / BE / CN	2015	Jamel Debbouze	2 478 630
19	Babysitting 2	FR	2015	Philippe Lacheau, Nicolas Benamou	2 398 519
20	Qu'est-ce qu'on a fait au Bon Dieu? (5)	FR	2014	Philippe de Chauveron	2 381 641

(1) Provisional rankings based on the analysis of partially fragmentary data from 25 EU member states representing 90% of all admissions in the EU.
(2) 1 099 640 admissions in the EU in 2014.
(3) 166 274 admissions in the EU in 2014.
(4) 8 528 827 admissions in the EU in 2014.
(5) 17 475 067 admissions in the EU in 2014.
Note: 'inc' refers to films produced with incoming investment from the US.

Source: European Audiovisual Observatory /LUMIERE

Market share for European films at five year's low

In contrast to 2014, admissions growth was driven primarily by the strong performances of a number of US studio titles. On a cumulative basis, admissions to US films increased by around 50 million leading to an estimated market share of 64%, while the biggest box office boost came from the renewed strength of UK films produced with incoming US investment (GB inc) whose market share rose from 0.4% to 7.3%. Admissions for European films on the other hand, declined causing European market share in the EU to drop from its exceptional 2014 record level of 33.5% to an estimated 26.1%, the lowest level in the past five years.

Table 4: EU market share by country of origin 2011 – 2015 prov

In % of total admissions. Provisional estimates.

Region of origin	2011	2012	2013	2014	2015 *prov*
US	61.6%	62.3%	69.5%	63.2%	64.0%
EUR inc / US	8.1%	6.9%	1.1%	0.4%	7.3%
Europe	28.5%	29.3%	26.2%	33.5%	26.1%
Other	1.8%	1.5%	3.2%	2.9%	2.6%

Source: European Audiovisual Observatory / LUMIERE

EU film production volume continues to grow

After having come to a temporary halt in 2014 EU production levels continued their growth trend of recent years, as the estimated number of European feature film productions increased from 1 593 to 1 643 theatrical films. This figure breaks down into an estimated 1 127 fiction films (69%) and 516 feature documentaries (31%). The increase in production activity was primarily linked to an increasing number of co-productions which accounted for 24% of total production volume in 2015.

Table 5: Number of feature films produced in the European Union 2011 – 2015 prov

Provisional estimates.

Type of production	2011	2012	2013	2014	2015 *prov*
Feature fiction films est (1)	1 096	1 103	1 130	1 099	1 127
Feature documentaries est (1)	451	462	477	494	516
Total feature films est (1)	**1 547**	**1 565**	**1 607**	**1 593**	**1 643**

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

Source: European Audiovisual Observatory / LUMIERE

Digital conversion rate in the EU remains at 92%

According to figures provided by MEDIA Salles the digitisation process in the EU has been more or less completed in the EU. By the end of 2015 a total of 19 EU Member States had converted 90% or more of their screen base. Only three Member States registered digital screen penetration rates below 70%: Estonia (69%), Lithuania (61%) and the Czech Republic (55%). There were a total of 29 705 digital screens by the end of 2015, representing 92% of the EU's total screen base. This is the same ratio already achieved in 2014.

Table 6: Digital Screens in the European Union 2011 – 2015 prov

Provisional estimates.

	2011	2012	2013	2014	2015 *prov*
New digital screens	7 041	5 860	4 355	1 858	982
Total digital screens as of Dec. 31	15 826	21 686	26 041	28 093	29 075
Digital screen penetration as of Dec. 31 est	54%	72%	87%	92%	92%

Source: MEDIA Salles, European Audiovisual Observatory

More detailed information on European as well as international theatrical markets can be found in *FOCUS 2016 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 2015 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 41 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 18th April 2016. 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 2015 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 2015 shown in table 4 are based on the data on admissions to individual films as collected in the LUMIERE database on 18th April 2016. 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 90%. 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/2016

More detailed information can be found in

FOCUS 2016 World Film Market Trends

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

Our FOCUS publication is on sale via our website as of 12 May 2016
(see: http://www.obs.coe.int/shop/focus).
We will also be selling it on our stand in Cannes.