OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

The Circulation of European Films Outside Europe

Key Figures 2015

Martin Kanzler

A report by the
European Audiovisual Observatory

December 2016

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

The Circulation of European Films Outside Europe

Key Figures 2015

Director of publication

Susanne Nikoltchev
Executive Director, European Audiovisual Observatory

Author

Martin Kanzler
Film Analyst, Department for Information on Markets and Financing, European Audiovisual Observatory
martin.kanzler@coe.int

Supervising editor

Gilles Fontaine
Head of the Department for Information on Markets and Financing, European Audiovisual Observatory

Marketing

Markus Booms, European Audiovisual Observatory, markus.booms@coe.int

Press and Public Relations

Alison Hindhaugh, European Audiovisual Observatory, alison.hindhaugh@coe.int

Acknowledgements

The Audiovisual Observatory would like to thank all of our contacts in organisations across Europe who regularly provide us with the necessary data to keep our LUMIERE database up-to-date.

The Circulation of European Films Outside Europe

Key Figures 2015

Martin Kanzler

A report by the
European Audiovisual Observatory

December 2016

TABLE OF CONTENTS

EXECUTIVE SUMMARY

This report **focuses on the theatrical exploitation** of European films **outside Europe**. It has to be kept in mind that the theatrical window is only one out of – broadly speaking – four market segments. Foreign TV, Video and VOD markets may also provide relevant market potential for European films but cannot be quantified due to intransparency of corresponding consumption figures. Nota bene: Due to different methodologies data may differ from figures published by national sources.

Theatrical market volume of European films outside Europe in 2015

An estimated total of **599 European films were on theatrical release** in at least one of the 12 non-European markets covered in this report. This is the largest number of European films released **outside Europe** in the past five years and represents **about 10% of the total number of European films on release worldwide** (see Figure 1 below).

These 599 films cumulatively generated about **108 mio admissions** outside Europe. This is the second highest level measured in the past five years (see Figure 2). Applying local average ticket prices this corresponds with an estimated **EUR 610 mio in gross box office** earned by European films outside Europe in 2015.

European films accounted for **20% of the tracked number of films on release** (slightly higher than the 5 year average of 19%) and **3% of the admissions** generated in the 12 non-European sample markets.

Figure 1 European films on release outside Europe in 2011-2015

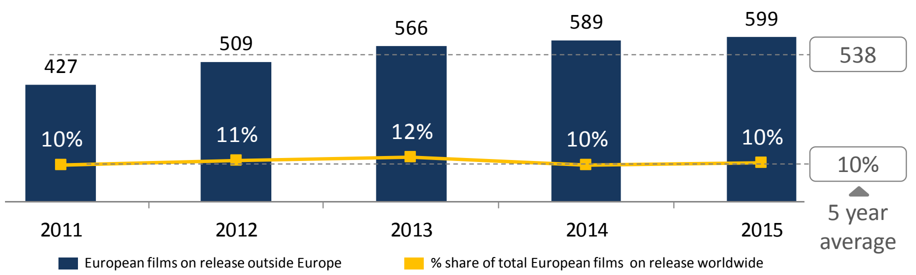


Figure 2 Admissions to European films outside Europe 2011-2015 (in mio)

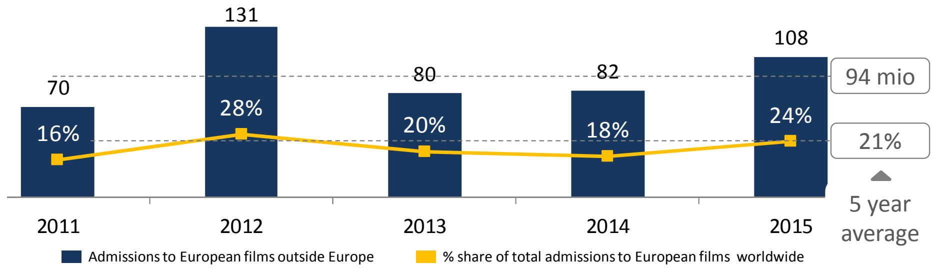
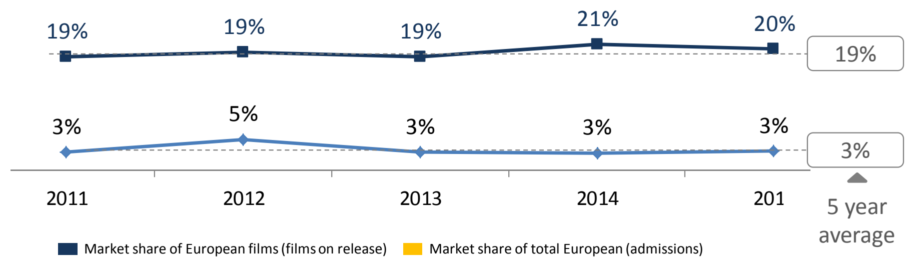


Figure 3 Market shares of European films outside Europe 2011-2015 (estimated)



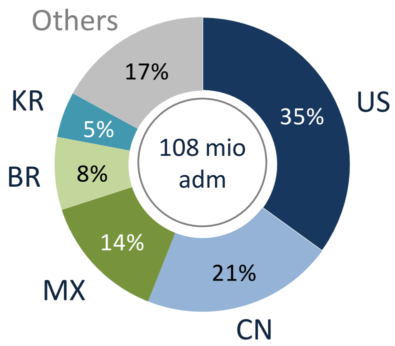
Source: European Audiovisual Observatory / LUMIERE, comScore, Oanda

North America is the largest market for European films outside Europe

The **North American market** maintained its position as **the most important "overseas" market for European films in terms of admissions**. In 2015 an estimated 37.9 and 4.2 mio tickets were sold to European films in the US and Canada respectively. The US market hence represents the single largest market for European films, accounting for 35% of total admissions to European films outside Europe, while the Canadian market accounted for 4%.

Despite the very limited number of European releases, **China** clearly came in as the **second largest market** for European films in terms of admissions with 22.7 mio tickets sold in 2015, accounting for 21% of total admission, followed by Mexico (14%), Brazil (8%) and South Korea (5%).

Figure 4 Admissions to European films outside Europe 2015 - by market



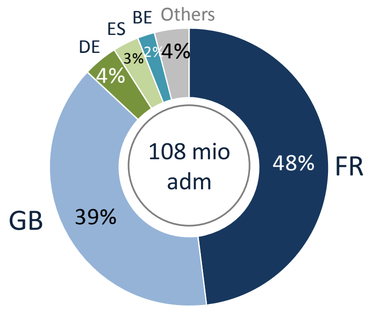
Source: OBS / LUMIERE, comScore

French and UK films cumulatively accounted for 87% of admissions to European films in 2015

Admissions to European films were rather concentrated with French and UK films cumulatively accounting for almost 87% of total admissions to European films outside Europe in 2015. **France** took **first rank** with French films cumulatively selling 51.5 mio tickets **accounting for 48% of total admissions** while **UK films**, which are traditionally strong in non-European markets, came in second place, with 42.3 mio admissions (**39% of total admissions** to European films). German films followed at a distance, cumulatively selling 4.2 mio tickets outside Europe in 2015 (4%) ahead of Spanish films (3.3 mio), Belgian films (2.5 mio) and Russian films (1.1 mio).

NB: Due to different methodologies data may differ from figures published by national sources

Figure 5 Admissions to European films outside Europe 2015 - by origin



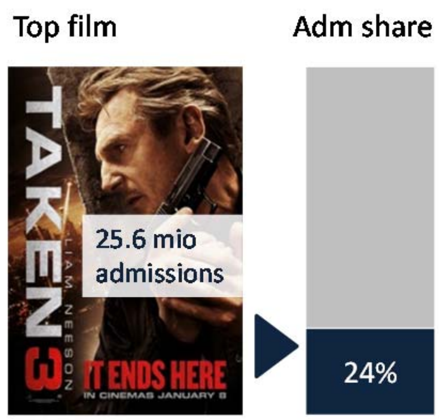
Source: OBS / LUMIERE, comScore

Taken 3 (FR) was most successful European film outside Europe selling 25.6 mio tickets

Olivier Megaton's English language action sequel ***Taken 3* (FR)** was released in all 12 non-European markets tracked *and* sold 25.6 mio tickets outside Europe in 2015, thus **accounting alone for 24% of total admissions** to European films **outside Europe**.

UK-French family comedy *Paddington* ranked second with 13.1 mio admissions ahead of the French-Italian animation *The Little Prince* (10.3 mio), *The Transporter Refueled* (FR/CN/BE, 7.1 mio),*The Woman in Black 2* (GB inc/US/CA, 5.5 mio), Shaun the Sheep Movie (GB), 5.2 mio).

Taken 3 was hence only one out of six European films which managed to generate more than 5 mio admissions. It is largely thanks to the success of these "blockbusters" that the cumulative results for European films were exceptionally strong in 2015.



INTRODUCTION & METHODOLOGY

1 Introduction

About this report

This report aims to provide a **high-level analysis** of the theatrical markets for **European films outside Europe** based on admissions data provided by comScore for 12 non-European markets including the North American market, five Latin American markets, China and South Korea as well as Australia and New Zealand. The analysis **focuses on 2015 data** but is **complemented by five-year data series** for the period **2011 to 2015** for all major indicators.

The report focuses on providing a **„big picture“ overview of the circulation of European films as a whole rather than analysing the film exports of individual European countries.** The latter may require different – sometimes country specific – methodological choices / research angles which are beyond the scope of this report. It is particularly important to note that because of the Observatory's choices regarding the allocation of a unique country of origin based on the majority financing share as well as the exclusion of films financed with incoming foreign investment data presented in this report may differ significantly from data published by national sources such as the British Film Institute or the CNC / UniFrance. **For the analysis of the export of films originating from a specific country, please refer to national sources.** See methodological remarks for further details.

The report addresses in particular the following **research questions**:

- How important is non-national exploitation, particularly outside Europe, for European films?
- How many European films are theatrically released outside Europe?
- How many admissions and GBO do they generate?
- What is their market share in the respective non-European markets?
- What are the most important theatrical markets for European films outside Europe?
- Which European films perfomed particularly well outside Europe?

About the European Audiovisual Observatory

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

www.obs.coe.int

European Audiovisual Observatory (OBS)

The European Audiovisual Observatory (hereafter 'Observatory') is a European public service body comprising 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 audiovisual industries. The mission of the Observatory is to collect, process and publish information about the various audiovisual industries, i.e. primarily film, TV, home entertainment and on-demand industries in Europe. In these areas the Observatory systematically collects statistical data and provides market as well as legal analysis which are distributed e.g. in the form of:

- print or electronic **publications**, including a statistical Yearbook, as well as **newsletters** and **thematic reports** or the Observatory's **website**;
- free **databases** on film admissions (LUMIERE), TV & on-demand services (MAVISE), AV law information (IRIS Merlin);
- contributions to **conferences**.

2 Data Sources & Methodology

Data sources

The data sample analysed in this report comes from two sources: Admissions data for the 12 **non-European markets** covered in this report have been provided **comScore / Rentrak Corporation**, a leading research company tracking global box office figures (see below). While data for the years 2013 to 2015 have been purchased by the European Audiovisual Observatory on behalf of a buying group consisting of several EFARN members, data for the years 2011 to 2012 have been kindly provided by the French CNC and the European Union's MEDIA Programme. All **European admissions data** come from the **European Audiovisual Observatory's LUMIERE database** which collates annual admissions from a wide variety of sources (see below).

www.comscore.com

comScore

comScore is a global cross-platform measurement company that measures audiences, brands and consumer behaviour across all screens. It completed its merger with Rentrak Corporation in January 2016. The company now offers its clients proprietary digital, TV and movie intelligence with vast demographic details to quantify consumers' multiscreen behaviour at massive scale.

LUMIERE

www.lumiere.obs.coe.int

LUMIERE database on film admissions

The Observatory's LUMIERE database is a free database which tracks cinema admissions to films in Europe since 1996. Admissions data come from a wide variety of sources, including national film agencies and statistics offices, inter-industry bodies, distributors' and exhibitors' associations, the trade press and a small number of private tracking bodies. This is supplemented and completed by data from the European Union's MEDIA Programme, on the basis of declarations made by distributors to its Automatic Distribution Support scheme.

www.cnc.fr

CNC (Centre national du cinéma et de l'Image animée)

The CNC (the French national centre of cinematography) is a public administrative organisation with a legal entity status and financial autonomy. It operates under the authority of the Ministry of Culture and Communication. The CNC's principal responsibilities are (i) regulation, (ii) support for the economy of the film, television video, multimedia and technical industries, (iii), the promotion of films and television productions and their dissemination to all audiences and (iv) the preservation and enhancement of cinema heritage.

https://eacea.ec.europa.eu/creative-europe_en

MEDIA Programme

The MEDIA sub-programme of Creative Europe supports the EU film and audiovisual industries financially in the development, distribution and promotion of their work. It helps to launch projects with a European dimension and nurtures new technologies; it enables European films and audiovisual works including feature films, television drama, documentaries and new media to find markets beyond national and European borders; it funds training and film development schemes.

Data scope

In principle the data set covers **title-by-title admissions data** for all **feature films on release**, i.e. films with at least one commercial theatrical screening in one of the markets covered. This includes holdovers, re-releases, retrospectives, paid festival screenings etc. **Alternative content screenings and short film compilations are not taken into account.**

This report covers **2015 admissions data** for **12 non-European markets** and puts them in the context of admissions data for another **30 European markets** covered in the LUMIERE database:

Market region	Countries covered in 2015
North America	1. Canada (CA) 2. USA (US)
Latin America	3. Argentina (AR) 4. Brazil (BR) 5. Chile (CL) 6. Colombia (CO) 7. Mexico (MX) 8. Venezuela (VE)
Oceania	9. Australia (AU), 10. New Zealand (NZ)
Asia	11. China (CN), 12. South Korea (KR)
Europe (covered at least partially)	Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK & Ireland (treated as one market)

Please note that there are differences in the coverage rate of individual markets[1] which **can distort the direct comparability of statistical indicators**. This is particularly true with regard to the number of **films on release:** In many European countries LUMIERE seems to cover a higher number of smaller and “repertoire” films with very few admissions than comScore outside Europe. The number of films on release in Europe is hence portrayed as significantly higher than outside Europe. Given the lack of comprehensive and fully comparable data sets, it cannot be determined to which degree these are structural differences and to which degree this is simply caused by more limited data sets for non-European markets. Also note, that comScore data for the US and Canadian market appear to not provide full coverage of admissions to French language films e.g. in Québec. Hence, all data in this report drawn from LUMIERE are to be interpreted as **estimated minimum figures**.

[1] Though the LUMIERE database aims to cover all 41 member states of the European Audiovisual Observatory, in practice coverage rates vary across individual territories. The overall coverage of the database for the reference period is generally estimated at around 86% of the total European market. See appendix for a full overview of LUMIERE coverage rates by market.

Methodological remarks & definitions

How to measure "film market volume"?

Theatrical feature films are commercially exploited across a variety of different distribution windows. However, it is practically impossible to quantify the total market volume for theatrical films across all these windows. This is primarily due to methodological challenges faced by the variety of business models through which theatrical films can be commercially exploited on the one hand, and the intransparency of certain market segments with regard to consumption data on the other hand.

The approach chosen in this report is to measure market volume in terms of consumer expenditures on film. Methodologically speaking this approach can be easily applied to measure the market volume of theatrical markets (gross box office), physical video retail and rental markets as well as transactional VOD markets. It gets however more complicated when it comes to the exploitation of films on TV or SVOD services, where there is generally no direct link between consumer expenditures and the consumption of theatrical films. In order to overcome this issue one could e.g. estimate corresponding retail equivalent values as done for instance by the British Film Institute.

However it is the intransparency of most exploitation markets with regard to consumption data which poses the major obstacle in measuring film market volume across the various windows. The theatrical cinema market is practically the only window for which reliable data are available. While in most countries data are in fact being tracked for the home entertainment (DVD / BluRay retail and rental), and TV markets they are generally not made available to the general public and are sold at prohibitive prices which makes their tracking practically impossible for an organisation like the Observatory. In the case of VOD markets, the situation is even worse as they still remain more or less completely intransparent with regard to consumer expenditures in the vast majority of markets.

Given these difficulties, this report focuses on measuring the theatrical market volume for European films in terms of admissions (number of cinema tickets sold) and GBO (gross box office) which is estimated by multiplying admissions with annual average ticket prices – converted to Euros using the average annual bid rate for the calendar year 2015 – within each territory covered in this report.

Why may data presented in this report differ from data published by other sources?

Broadly speaking, data differences may be caused by different data sets and / or different methodological choices. Given the focus of this report on providing a „big picture" overview of the circulation of European films as a whole rather than analysing the film exports of individual European countries, the Observatory's methodological choices – in particular regarding the allocation of a unique country of origin based on the majority financing share as well as the exclusion of films financed with incoming foreign investment – may differ from methodologies applied by national sources who seek to analyse the export of films originating from their countries. Data presented in this report may hence differ significantly from data published by national sources such as the British Film Institute or the CNC / UniFrance. For the analysis of the export of films originating from a specific country, please refer to national sources.

What is the definition of "film" in the context of this report?

In principle the data set covers all **feature films on theatrical release**, i.e. films with at least one commercial theatrical screening in one of the markets covered. This includes - from a methodological perspective - holdovers, re-releases, retrospectives, paid festival screenings etc. Alternative content screenings and short film compilations are not taken into account.

What does the term "film offering" stand for?

In the context of this report the term "film offering" refers to the number of films on release. It should of course be noted that the number of films on release is the most basic indicator for measuring the theatrical film offering in a country and - in itself - has limited informational value with regard to how many European films were actually accessible to audiences It does not provide any information about the actual availability of a film - which depends entirely on the number of screens the film is shown on and the frequency of screenings, as well as the number of days / weeks it remains in cinemas. These data could however not be analysed within the scope of this report.

What does "on release" mean?

Any film that has at least one commercial theatrical screening in a territory is considered as a film "on release". This includes first releases, holdovers, re-releases, retrospectives, paid festival screenings etc. Please note that differences in the coverage rate of individual markets and in particular differences between Europe and non-European markets regions can limit the direct comparability of the indicator "number of films on release" and distort any related statistical analysis: In many European countries LUMIERE seems to cover a higher number of smaller and repertoire films with very few admissions than covered by comScore data outside Europe. The number of films on release hence is portrayed as significantly higher in some markets than in others. Given the lack of comprehensive and fully comparable data sets, it cannot be determined to what degree these are structural differences and to which degree this is simply caused by more limited data sets for non-European markets.

What is a "first release"?

A "first release" is defined as a film which gets commercially released for the first time in a specific territory. The concept of "first release" is by definition linked to a specific market, as films can be released in one market in one year and in another the subsequent year and will appear as first releases in different years in national statistics in both markets.

It is difficult to identify the number of first releases: On the one hand, there is an issue with regard to data quality: release dates may be missing or may refer to the "release date" in a particular year rather than the original release date of the film. Hence some re-releases / holdovers / festival releases might be counted as commercial first releases and all data are to be considered estimates. On the other hand, there is an inherent methodological issue in defining a "first release" on a multi-territory basis which is best illustrated by an example: A French film can be released in France in 2013, in the US in 2014 and in China in 2015. Should this film be counted as a first release outside Europe in 2015? In answering this question, one can apply two different definitions:

- *Wide definition*: A first release outside Europe refers to films that were first released in at least one non-European market in a specific year. According to this definition the above mentioned film is considered a first release in 2015, as it is counted as such in China.
- *Narrow definition*: A first release outside Europe refers to films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before. When applying this definition to a region, the region is treated as if it were a single market. According to this definition the above mentioned film is considered a first release outside Europe in 2014 and an "other release" in 2015.

What are "admissions"?

Admissions refer to the number of cinema tickets sold for the theatrical screening of a film.

What is "GBO"?

GBO stands for gross box office and refers to consumer expenditure on cinema tickets. As LUMIERE only covers admissions data, GBO figures are estimated by applying the average ticket price in a market to the number of admissions. In some markets where only GBO figures but no admissions data were available, the same method is used to estimate admissions.

What is the definition of a "European film"?

European films are all films considered to be of European origin, i.e. to **be produced and majority financed by** a European country. In the context of this report all **member states of the Council of Europe** are considered to be European states.

European films produced with incoming investment from US studios such as the *Harry Potter* or the *James Bond* franchises ("INC" films as defined below) are in principle not considered to be European in the context of this sample. Because of their untypically high box office potential they would distort admission and global circulation statistics for 'typical' European films. In the context of this report they are hence generally considered as US films.

However, INC films designated as European films by the European Commission or Europa Cinemas are counted as European films. A list of "EUR INC" films counted as European films in the context of this report can be found in the appendix

Please note that this exclusion of "INC films" concerns primarily UK films and may hence result in significant differences to publications on film exports by national sources such as the British Film Institute.

What is an "INC" film?

The **"INC"** marker is a contraction of "**incoming investment"**. An "incoming investment" film is defined as one for which the main producer is a **company established in a country** but **under the ownership and/or control of a company registered in another country** (mostly a US studio).

Thus a film categorised as "GB inc / US" is a film produced in the United Kingdom (GB) where the main producer is a United Kingdom-registered company which may be wholly or partially owned or controlled by a US company. A "FR inc / US" film is a work produced in France (FR) where the main producer is French-registered company wholly or partially owned or controlled by a US company. These films are particularly hard to identify as the Observatory does not have access to detailed production information on films. There may hence be mistakes in the classification of „INC" films and the Observatory occasionally revises its attribution when further information becomes available. Readers noticing any inaccurate origin allocation for a specific film are invited to contact the Observatory team under lumiere@obs.coe.int.

As mentioned above **EUR INC films are – by default – not considered to be European films in the context of this report.** A full list of EUR INC films is however provided in the appendix for the benefit of those readers who would like to include them in the analysis

What is the definition of "Europe"?

Europe as a region of origin is defined as the 47 member states of the Council of Europe (see http://www.coe.int/en/web/portal/47-members-states) and Belarus.

Europe as a market refers to the entirety of the European markets for which at least partial admissions data is available in the Observatory's LUMIERE database (see data scope). This figure ranges between 30 and 34 European markets in any of the years between 2011 and 2015.

How is a film allocated to its "country of origin"?

In order to calculate market shares by country of origin without double counting films, each film has is allocated a **unique country of origin** within the LUMIERE database.

Defining the nationality of a film is a complex task. There are no widely accepted international or even European definitions of the criteria to be used to determine the country of origin of a film. This is both a legal and a statistical problem. Different national records - and the statistics on which they are based - can show the same film as having a whole range of nationalities.

Adopting a pragmatic approach, the Observatory considers as the country of origin of a specific film the country out of which the film is financed. In the case of international co-productions (defined below) the film is assigned to the country which provides the majority share of production financing. The Observatory tries to list all co-producing countries in the order of their financial investment in the film (whether known or assumed), with the country having provided the majority financial investment in the production in first place, e.g. a "FR/DE" co-production is considered to be French film in the context of this report.

Please note, that the allocation of a country of origin in LUMIERE may differ from the allocation applied by national film agencies or other organisations, and so may consequently any statistics based on the country of origin.

What is the definition of "co-production"?

A co-production is defined as a film whose production budget is financed by sources stemming from two or more countries. The country providing the majority of the financing, i.e. the majority coproduction country, is considered to be the country of origin. In the case of an parity co-production, e.g. Germany 40% / France 40% / Spain 20%, the nationality of the director and subsidiarily the cultural content of the film determine to which country the film is allocated on a case-by-case basis. Co-productions are indicated in LUMIERE by the allocation of at least two countries of origin, e.g. "AT / DE" stands for an Austrian majority and German minority co-production.

This definition of a co-production is not identical with the qualification as an "official co-production" (which is based on satisfying the requirements set out in the relevant co-production treaties, or those of the European Convention on Cinematographic Co-production) but also includes co-productions that are not necessarily registered by the national film agencies. For instance this can be the case where national broadcasters co-produce feature films with foreign partners.

The Observatory identifies co-productions on the basis of information provided by various sources. When a new film is created the system will, by default, apply the countries of origin as indicated on IMDB. These data are consequently checked and adjusted by using information provided by national film agencies and / or the trade press.

As a consequence the qualification of a film as a co-production and its allocation to a specific country of origin by the Observatory may differ from co-production listings published by other sources.

As the Observatory does not have access to detailed production information on films, it does not claim to have got its identification right in every case and it occasionally revises its attribution when further information becomes available. Readers noticing any inaccurate origin allocation for a specific film are invited to contact the Observatory team under lumiere@obs.coe.int

What are "national" / "non-national" admissions / markets?

The country of origin is considered to be the "national" market of a film. All other markets are referred to as "non-national" markets. Accordingly, "national" admissions are defined as admissions in the country of origin of the film, i.e. 100% national or majority co-producing country. All other markets – including other (minority) co-producing countries – are considered as non-national markets. For example Spain is considered the national market for *Planet 51*, an ES/UK co-production, while the UK release is counted as a non-national release. „Non-national" admissions are consequently admissions generated outside of the national home market.

What does "worldwide" refer to?

In the context of this report the term "worldwide" refers to the entirety of the 30 European and 12 non-European markets which are – at least partially – covered in this report.

What does "Outside Europe" / "non-European" mean exactly?

In the context of this report the terms "outside Europe" or „non-European markets" refer to the 12 non-European markets covered in this report.

How is "average" defined?

In the context of this study an average value can be expressed either as the "mean" or the "median" value. The mean refers to the arithmetical total of all the values in the array divided by the number of values. The median is found by arranging the values in order and selecting the middle value. If not pointed out otherwise the term "average" refers to the mean value.

How reliable are the underlying data sets?

The Observatory collects data from what it considers to be the most reliable data sources in each territory. However, there can be significant differences in the coverage rates among individual markets and / or years which may have an impact on the interpretation of the data.

The coverage rates of each market for the years 2011 to 2015 are shown in the appendix. The data coverage for European markets at the time of writing was comparatively low for 2015 data: The 2014 data set included admissions data for 34 European countries including comprehensive coverage of about 1 500 films on release in Spain, while the 2015 data set covered only 30 European markets and covers only the top 500 films on the Spanish market. Evidently, the number of films covered has a direct impact on the number of films tracked to be on release. It has however hardly any impact on the other indicators, i.e. the number of first releases, admissions and GBO. **Nevertheless, all 2015 data are to be considered as provisional data .**

The Observatory is furthermore in no position to verify the accuracy of the data provided by the various third party data sources. Neither the Observatory nor its third party sources can warrant that the provided data are free of errors, omissions or other inaccuracies.

How were comScore and OBS film data matched?

The title-by-title admissions lists provided by comScore were imported into the LUMIERE database via a process of title matching. In cases where comScore could not provide any admission figures, admissions were estimated by dividing the gross box office result by the average annual ticket price of the market in question.

By integrating the non-European admissions into LUMIERE the European Audiovisual Observatory was in a position to calculate market shares for European films in non-European countries based on the same methodology as for the European markets. Of particular importance in this context is the allocation of a country of origin to any individual film (see above).

THE BIG PICTURE - 2015

3 Theatrical Market Volume of European Films

Total "film market volume" obscure due to intransparent markets

It is practically impossible to quantify the total market volume for theatrical films across their value chain. As set forth in the methodological remarks this is partly due to methodological challenges faced by the variety of business models through which theatrical films can be commercially exploited along the different windows. But methodological difficulties aside it is primarily the intransparency of certain market segments which makes it impossible to quantify related consumer expenditures.

The **theatrical cinema market** is practically the **only exploitation window for which reliable data are available.** While in most countries data for the physical video, Transactional VOD, television and Subscription VOD markets are either not available at all or are sold at prohibitive prices which makes their tracking practically impossible for an organisation like the Observatory. As a consequence, this report can only analyse the theatrical exploitation of European films. For this reason the **analysis of „film exports" generally focuses only box office** figures on foreign markets. It is however important to keep in mind that the theatrical exploitation window is only one out of - broadly speaking - four main market segments all of which may provide relevant - though not quantifiable in the research context of this report - market potential for European films outside Europe. [2]

Theatrical market volume of European films worldwide in 2015

Theatrical market volume can be measured in terms of film offer, i.e. number of films on release, admissions and gross box office (GBO). Figure 6 overleaf provides a „big picture" overview of the volume and breakdown of worldwide market volume to European films in 2015. As mentioned above the term „worldwide" refers to cumulative data for the 30 European and 12 non-European markets covered in this report[3]. Given this partial coverage data have to be interpreted as minimum values.

Based on the title-by-title admissions data provided to the Observatory by comScore as well as national data providers **5 939 European films** could be identified as being **"on release".** That means that 5 939 European films sold at least one ticket for a theatrical screening in at least one of the markets covered in 2015. This figure is slightly lower than in 2014 where 6 188 European films were tracked to be on release (see Table 1). This does however not necessarily indicate a decline in the number of European films on release as the lower number of films tracked in 2015 may be linked to comparatively lower data coverage at the time of writing.[4] In fact, 2015 release figures are the second highest level tracked and well above the five-year average.

Practically all European films tracked to be on release in 2015 were on release in at least one of the European markets (98%), while only 10% of European films were identified to be on release outside Europe. This is well in line with percentage shares observed between 2011 and 2014 (see Table 1).

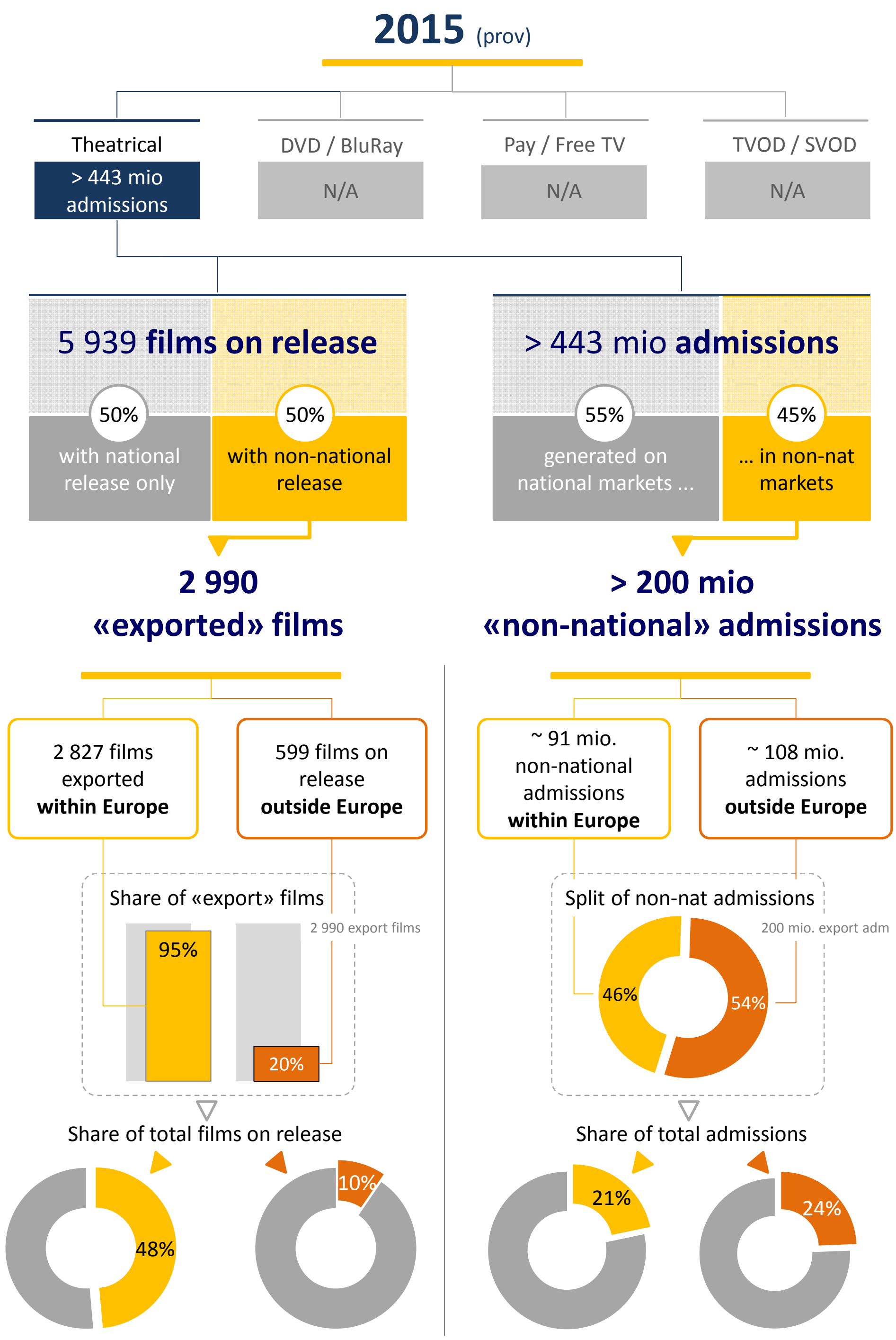
[2] In the UK – which is one of the few countries in which consumer expenditures or retail equivalents – were measured for all market segments the data suggest that theatrical GBO accounted for 27% of total revenues in 2013, representing the third largest market segment behind TV (38%) and physical video sales and rentals which in 2013 were still slightly above box office levels. Data for the French market for instance suggest that the market share of French films is twice is high on the theatrical market than it is on the physical video market. Given the lack of data it remains however unclear to which extent these results are representative for film exploitation in other European countries.

[3] See Chapter 2 for details on data sources and data scope.

[4] The 2014 data set included admissions data for 34 European countries including comprehensive coverage of about 1 500 films on release in Spain, while the 2015 data set covered only 30 European markets and covers only the top 500 films on the Spanish market. Evidently, the number of films covered has a direct impact on the number of films tracked to be on release. It has however hardly any impact on the other indicators, i.e. the number of first releases, admissions and GBO.

Figure 6 At a glance: "Worldwide" theatrical market volume of European films in 2015 prov

Provisional figures for 2015.



Source: European Audiovisual Observatory / LUMIERE, comScore

Table 1 **Number of European films on release by release region 2011 – 2015**
As tracked in LUMIERE. Provisional data for 2015 due to comparatively lower data coverage at time of writing.

	2011	2012	2013	2014	2015 prov	Avg
“Worldwide”	**4 469**	**4 730**	**4 916**	**6 188**	**5 939**	**5 248**
In Europe	4 384	4 622	4 762	6 061	5 796	5 129
Outside Europe	427	509	566	589	599	538
- % share In Europe	98%	98%	97%	98%	98%	98%
-% share Outside Europe	10%	11%	12%	10%	10%	10%

Source: European Audiovisual Observatory / LUMIERE, comScore

European films cumulatively generated **about 443 mio admissions, i.e. ticket sales,** in the 42 “worldwide” sample markets in 2015. Applying annual average ticket prices the Observatory estimates that European films earned **roughly EUR 2.9 billion in gross box office.**

As shown in Table 2, 76% of “worldwide” admissions to European films were generated on European markets, while ticket sales outside Europe accounted for 24%, the second highest level in the past five years. These figures indicate that European films – on a cumulative basis – performed exceptionally well outside Europe in 2015. Like in 2012 these strong results outside Europe are primarily linked to a comparatively high number of European “blockbusters” selling more than 5 million tickets. See chapter 9 and 11 for further details on concentration of admissions and the top performing European films.

European markets are believed to be slightly more important in terms of gross box office, accounting for an estimated 79% of “worldwide” GBO in 2015, due to higher average ticket prices compared to e.g. the Latin American markets. Nevertheless, on a cumulative level European films are estimated to have generated 21% of their GBO takings outside Europe in 2015.

Table 2 **Admissions to European films “worldwide” 2011 – 2015** (estimated)
As tracked in LUMIERE. Provisional data for 2015 due to comparatively lower data coverage at time of writing.

Admissions (in mio)	2011	2012	2013	2014	2015 prov	*Avg*
“Worldwide”	**426**	**474**	**397**	**458**	**443**	**440**
In Europe	357	343	317	376	335	346
Outside Europe	70	131	80	82	108	94
- % share In Europe	84%	72%	80%	82%	76%	79%
-% share Outside Europe	16%	28%	20%	18%	24%	21%

GBO (in MEUR)	2011	2012	2013	2014	2015 prov	*Avg*
“Worldwide”	**2 715**	**3 090**	**2 538**	**3 092**	**2 890**	**2 865**
In Europe	2 354	2 368	2 121	2 597	2 280	2 344
Outside Europe	361	722	416	496	610	521
- % share In Europe	87%	77%	84%	84%	79%	82%
-% share Outside Europe	13%	23%	16%	16%	21%	18%

Source: European Audiovisual Observatory / LUMIERE, comScore

48% of European films "exported", accounting for 45% of total admissions in 2015

2 990 European films – 48% of European films identified to be on theatrical release in 2015 - were exported, i.e. released in at least one non-national market. More or less all of these "export" films received a release on a non-national market within Europe, while 599 of them were **on release in at least one of the 12 non-European territories covered**. Thus, in 2015 **about 10%** of all **European films on release** were screened outside Europe.

On a cumulative level, European films generated 55% of their total admissions on their respective national markets while theatrical exports, i.e. non-national admissions, accounted for about 45% of the overall admissions. Breaking non-national admissions further down, the data suggest that about 91 mio tickets were sold on non-national European markets while 108 mio tickets were sold in the 12 non-European markets covered. These figures show that - on a cumulative level - theatrical exploitation outside Europe does contribute a significant share of the overall theatrical market volume of European films: About **24% of estimated worldwide admissions** and the **majority of non-national admissions (54%)** to European films were generated **outside Europe.**

Table 3 "National" vs "non-national" market volume of European films 2011 – 2015 (est)

As tracked in LUMIERE. Provisional data for 2015 due to comparatively lower data coverage at time of writing.

Films on release	2011	2012	2013	2014	2015 prov	*Avg*
"Worldwide"	**4 469**	**4 730**	**4 916**	**6 188**	**5 939**	**5 248**
On national market	2 636	2 687	2 895	4 124	3 961	3 261
On non-national market	2 538	2 827	2 794	3 181	2 990	2 866
% share national	59%	57%	59%	67%	67%	62%
% share "export films"	57%	60%	57%	51%	50%	55%
- Non-nat. in Europe	2 429	2 671	2 611	3 006	2 827	2 709
- Non-nat. outside Europe	427	509	566	589	599	538
% share export within Europe	54%	56%	53%	49%	48%	52%
% share export outside Europe	10%	11%	12%	10%	10%	10%

Admissions (in mio)	2011	2012	2013	2014	2015 prov	*Avg*
"Worldwide"	**426**	**474**	**397**	**458**	**443**	**424**
On national market	268	227	237	277	244	246
On non-national market	158	247	160	181	200	179
% share national	63%	48%	60%	60%	55%	58%
% share "export films"	37%	52%	40%	40%	45%	42%
- Non-nat. in Europe	89	116	80	99	91	94
- Non-nat. outside Europe	70	131	80	82	108	85
% share export within Europe	21%	24%	20%	22%	21%	22%
% share export outside Europe	16%	28%	20%	18%	24%	21%

Source: European Audiovisual Observatory / LUMIERE, comScore

MARKET VOLUME OUTSIDE EUROPE IN 2015

4 European Film Releases Outside Europe

As explained in the methodology section, measuring film releases, particularly across multiple territories, is a difficult exercise where no clear-cut definitions can be applied and no individual indicator emerges as the sole reference indicator. Consequently, two complementary indicators will be analysed in the context of this report: the number of *films on release* as well as the number of *first releases*.

The ***film on release*** indicator counts any film that has at least one commercial theatrical screening (i.e. generated at least one cinema ticket sale) in any sample market tracked[5].This represents the widest possible definition of a film release. This indicator definition also underlies the quantification of admissions and GBO which are measured for all films on release.

The ***first releases*** indicator on the other hand only counts films which get a proper commercial release for the first time in a specific territory or region[6]. This represents the narrowest possible definition of a film release. Even though representing a comparatively small share of the films on release, first releases generally account for the vast majority of admissions.

By analysing both of these two indicators one can define the maximum and minimum values of the bandwidth within which one can reasonably quantify the number of film releases. Depending on the question to be addressed readers can pick the most appropriate indicator out of these two or estimate a reasonable value within the bandwidth.

599 European films *on release* outside Europe in 2015

As shown in Figure 7 overleaf, **599 European films** were tracked by comScore to be **on release** in cinemas **outside Europe in 2015**. This includes first releases as well as holdovers, re-releases and festival or other screenings in commercial cinemas.

These 599 films represent **10% of the 5 939[7] of European films which could be identified to be on theatrical release** in at least one of the 42 countries covered in this study. In other words, only one in ten European films tracked to be on release in 2015 was screened in a cinema outside Europe.

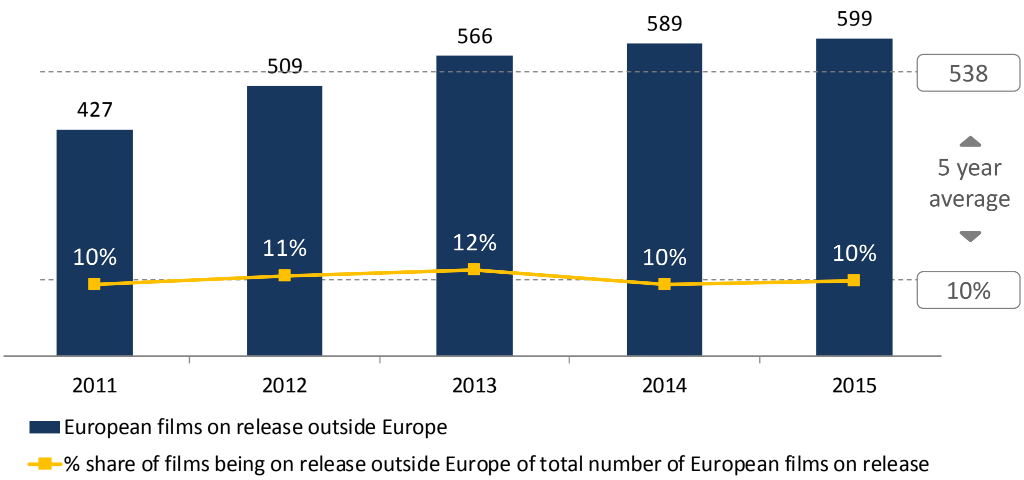
The number of European films on theatrical release outside Europe has been **growing consistently since 2011**. As illustrated in Figure 7, in 2015 **release figures** reached a **temporary record high** of 599 European feature films tracked by comScore. This is well above the five-year average of 538 films on release.

5 **Important note:** Given the methodological difficulties linked to classifying films by release type (first release, holdover, re-release, etc.) the number of films "on release" provides a methodologically consistent figure which allows the comparison over time. It should however be noted, that the number of films on release is directly linked to the coverage rate achieved by comScore in a specific market and year. Differing coverage rates can hence introduce a technical bias which can limit the ability to correctly identify trends over time. Given the lack of alternative data, the existence and / or extent of this bias cannot be evaluated by the Observatory. Details on the coverage rates for all markets and years are provided in the appendix.

6 **Important note:** Apart from the difficulties linked to defining and identifying a "proper commercial release" there are methodological issues when it comes to defining a "first release" on a multi-territory basis. Two definitions are introduced in Chapter 2: a "*wide definition"* (films which were first released in at least one non-European market in a specific year) and a *"narrow definition"* (films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before). Which of the two definitions is more appropriate may differ depending on the research question to be analysed.

7 2015 figures are provisional as they are based on LUMIERE data as of 30/9/2016. Additional admissions data, particularly from declarations to the MEDIA Programme, remain to be imported into LUMIERE once they become available. The number of films on release is consequently expected to increase as a result of supplementary data imports.

Figure 7 **Number of European films on release outside Europe 2011 – 2015** (estimates)



Remark: The fact that data for China are only available for years the 2014 and 2015 does not limit the comparability of the number of films on release due to the low number of European films which were only on release in China (9 and 11 films respectively).

Source: European Audiovisual Observatory / LUMIERE, comScore

The number of European films on theatrical release outside Europe between 2011 and 2015 is shown in detail in Table 4 which includes release data for all non-European markets covered in this study. Looking at the entire five year period from 2011 to 2015 the number of European film releases has grown in all world regions with the exception of the North American market.

The growth in the number of European films on release in 2015 is linked primarily to an increasing number of European films being screened in the Latin American sample countries where 376 European films were screened, compared to 318 in 2014 and 205 in 2011. In contrast, the number of European films tracked to be on release remained fairly stable in Oceania (127 films) and decreased somewhat in the North American market (from 218 films in 2014 to 210) as well as the two Asian markets studied (from 155 films in 2014 to 128 films).

Table 4 Number of European films on release outside Europe 2011-2015

As tracked in LUMIERE.

	2011	2012	2013	2014	2015	*Average*
Outside Europe	**427**	**509**	**566**	**589**	**599**	**538**
US & CA	**221**	**277**	**273**	**218**	**210**	**240**
Latin America	**205**	**216**	**226**	**318**	**376**	**268**
AU & NZ	**88**	**101**	**102**	**126**	**127**	**109**
CN & KR	**-**	**-**	**-**	**155**	**128**	**142**
CA	98	149	133	94	99	115
US	183	217	202	188	191	196
AR	59	74	58	87	115	79
BR	79	93	111	144	186	123
CL	35	31	30	40	54	38
CO	44	61	63	94	109	74
MX	71	87	75	130	155	104
VE	21	34	24	23	44	29
AU	65	87	75	110	115	90
NZ	61	60	70	72	67	66
CN	-	-	-	22	27	25
KR	63	114	180	142	108	121

Source: European Audiovisual Observatory / LUMIERE, comScore

299 European *first releases* outside Europe in 2015

Applying the **narrow definition of a “first release”** an **estimated 299 European films premiered** in cinemas outside Europe in 2015. In other words, 50% of the European films on release had never been released in cinemas in any of the 12 non-European sample markets before 2015. This means that half of the European films on release outside Europe in 2015 were holdovers and/or re-releases (treating all non-European sample markets as one single territory).

The growth in the number of European films on release over the past five years seems to stem from an increasing number of holdovers and/or re-releases rather than an increase in first releases. As shown in Table 5, the estimated numbers of European first releases dropped from 358 in 2013 to 300 and 299 first releases in 2014 and 2015 respectively. In contrast, the number of other releases, i.e. holdovers and/or re-releases, has been increasing continuously from 142 in 2011 to 300 in 2015.

The number of first releases is naturally a bit higher, when applying the **wide definition of a first release** as it includes films which were first releases in one territory but holdovers in another. **In that case** an estimated **415 European films premiered** in 2015 in at least one of the 12 non-European markets covered in the data sample. That means that **69% of the European films on release outside Europe** were released for the first time in at least one of the sample markets in 2015.

Table 5 **European first releases outside Europe (narrow definition) 2011 – 2015** (estimated)

Remark: The narrow definition of a first releases refers to films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before.

	2011	2012	2013	2014	2015	Avg
Films on release	**427**	**509**	**566**	**589**	**599**	**538**
First releases	285	340	358	300	299	316
Other	142	169	208	289	300	222
% share First Releases	67%	67%	63%	51%	50%	60%
% share Other	33%	33%	37%	49%	50%	40%

Source: European Audiovisual Observatory / LUMIERE, comScore

As illustrated in Table 6 this is the second lowest level of first releases registered in the past five years. After increasing strongly from 399 European film premieres in at least one market outside Europe in 2011 to 474 and 525 films in 2012 and 2013, the number of European first releases dropped again to 429 in 2014 and 415 films in 2015. While first releases (in the wide sense) accounted for over 90% of European films on release outside Europe between 2011 and 2013, their share consequently dropped to 73% in 2014 and 69% in 2015.

Calculations based on the wide definition of a first release seems to confirm the growth trend in the number of holdovers and/or re-releases and the decline in the number of first releases which was observed in the calculations based on the narrow definition of a first release above. The percentage share of first releases (based on the wide definition) is however significantly higher and the drop over time is even more pronounced. These figures cannot be explained with reliable certainty. One possible explanation for this trend could be that digital cinema has increased the international demand for limited releases / screenings of holdovers or repertoire films. Another reason could be a shortening in the time lag for the international release of films, i.e. that European films released in the past two years were released internationally within one, rather than two years. Yet another - technical - reason can lie in the improved data coverage of comScore over the years. Without a detailed title-by-title analysis, which is beyond the scope of this report, it cannot be determined which of these potential factors impacted the data to which degree.

Table 6 **European first releases outside Europe (wide definition) 2011 – 2015** (estimated)

The wide definition of a first releases refers to films which were first released in at least one non-European market in a given year.

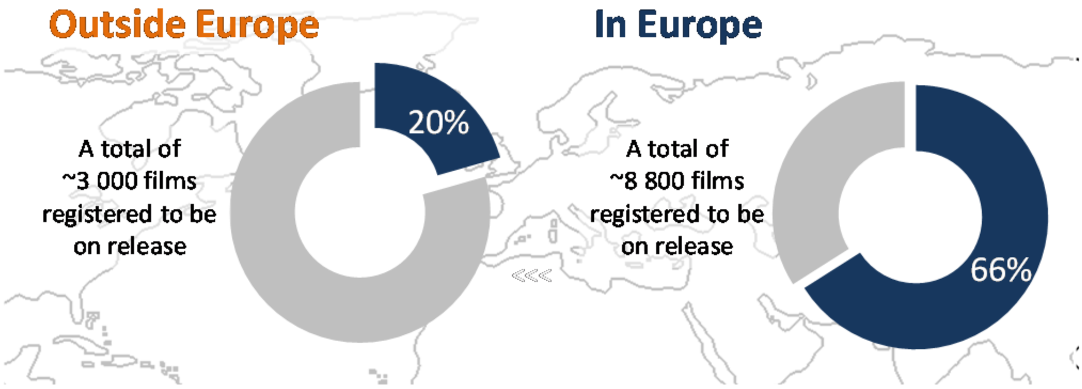
	2011	2012	2013	2014	2015	Avg
Films on release	**427**	**509**	**566**	**589**	**599**	**538**
First releases	399	474	525	429	415	448
Other	28	35	41	160	184	90
% share First Releases	93%	93%	93%	73%	69%	84%
% share Other	7%	7%	7%	27%	31%	16%

Source: European Audiovisual Observatory / LUMIERE, comScore

European films accounted for about 20% of the film offering outside Europe

Measured in terms of **films on release**, European films accounted for **20%** of the approximately 3°000 films identified to have been screened at least once **in the 12 non-European markets** in 2015. In other words, one out of five films on theatrical release outside Europe was of European origin. This compares to a 66% share of the theatrical film offering in Europe where about 8 800 film releases were registered in the LUMIERE database at the time of writing[8] (see Figure 8).

Figure 8 **Market share of European films in terms of films on release - 2015** (prov)
Provisional estimates.



Source: European Audiovisual Observatory / LUMIERE, comScore

Important note: As mentioned in the methodological remarks in Chapter 2 the number of films on release is an indicator which is directly linked to the coverage rates of individual markets which can significantly limit the direct comparability of this indicator across different territories or regions. For instance, the magnitude of the difference between European and non-European market with regard to the number of films identified as on release suggests that this indicator is probably not directly comparable in absolute terms. However, assuming that the proportional share by origin of films identified resembles the proportional distribution of films not identified in certain markets, the percentage share of European films can be considered to be a valid indicator when estimating the share of European films as portion of the total number of theatrical films on offer.

Likewise – when measured in terms of **first releases -** European films accounted for **19%** of the approximate 2 184 films which are estimated to have been theatrically released for the first time in at least one[9] of the 12 non-European markets covered.

As shown in Table 7 overleaf, the share of European films in the tracked film offering in 2015 is fairly comparable from region to region, ranging between 26% in Latin America and 21% in Australia & New Zealand. Only Asia, represented by China and South Korea, stands out with a comparatively low share of European films (12%) due to the low number of European films with a theatrical release in China, where European films accounted for only 4% of the tracked film offering in 2015. On a cumulative level, an estimated 56% of the films tracked to be on theatrical release in the 42 sample markets were of European origin.

8 2015 figures are provisional as they are based on LUMIERE data as of 30/9/2016. Additional admissions data, particularly from declarations to the MEDIA Programme, remain to be imported into LUMIERE once they become available. The number of films on release is consequently expected to increase as a result of supplementary data imports.

9 This figure is based on the „wide“ definition of a „first release“ (see methodological remarks in Chapter 2). Applying the narrow definition, i.e. treating a region as one single market, the percentage share of European first releases drops to 16% (299 European films out of an estimated total of 1 844 first releases outside Europe).

As noted in the methodological remarks, the number of films on release is the most basic indicator for measuring the theatrical film offering in a country. It does not provide any information about the actual availability of a film - which depends on the number of screens the film is shown on and the frequency of screenings, as well as the number of days / weeks it remains in cinemas. These data could however not be analysed within the scope of this report.

Table 7 Market share of European films in terms of films on release 2011 – 2015 (estimated)

	2011	2012	2013	2014	2015	*Average*
Outside Europe	**19%**	**19%**	**19%**	**21%**	**20%**	**19%**
US & CA	20%	21%	19%	24%	23%	21%
Latin America	25%	26%	24%	24%	26%	25%
AU & NZ	22%	25%	22%	22%	21%	22%
CN & KR	-	-	-	16%	12%	14%
CA	21%	28%	23%	20%	19%	22%
US	18%	18%	16%	23%	23%	20%
AR	20%	23%	17%	18%	23%	20%
BR	23%	28%	27%	26%	30%	27%
CL	19%	16%	17%	16%	20%	17%
CO	21%	29%	26%	27%	29%	26%
MX	22%	28%	20%	23%	27%	24%
VE	13%	21%	14%	12%	17%	15%
AU	19%	23%	19%	21%	20%	20%
NZ	22%	23%	24%	22%	19%	22%
CN	-	-	-	5%	4%	5%
KR	16%	24%	25%	24%	22%	22%

Source: European Audiovisual Observatory / LUMIERE, comScore

5 Admissions to European Films Outside Europe

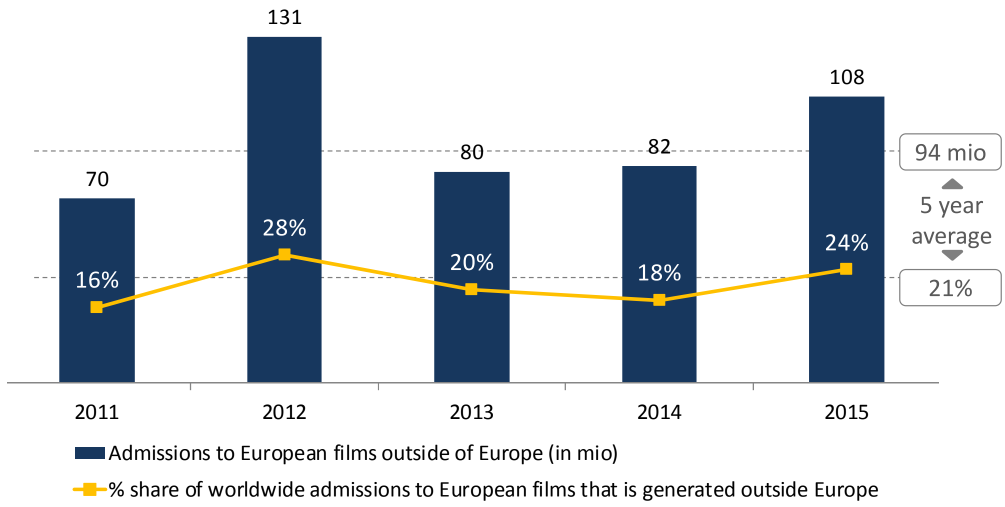
Over 108 million tickets sold to European films outside Europe in 2015

In 2015 European films generated **over 108 mio ticket sales** in the 12 non-European markets covered. This means that at least 24% of total "worldwide" admissions to European films occurred outside Europe. 2015 was – in cumulative figures - an exceptionally strong year for European films with results well above the five-year average values**.** As illustrated in Figure 9, this is the second highest admission level outside Europe achieved in the past five years, surpassed only in 2012.

The five year time series suggests that the elevated results in 2015 can be primarily explained by a comparatively high number of European "blockbusters" selling more than five million tickets outside Europe and do not indicate a general growth trend in the market volume of European films outside Europe. Leaving the exceptionally good 2012 results[10] aside, the figures suggest modest growth with admissions increasing from 70 mio in 2011 to 82.0 mio in 2014[11], almost exclusively linked to the assumed growth in admissions on the Chinese market.

Figure 9 **Admissions to European films outside Europe - 2015** (prov)

Pro-forma estimates for cumulative admissions in all 12 non-European sample markets.



Source: European Audiovisual Observatory / LUMIERE, comScore

[10] 2012 clearly stands out as a year with exceptionally good results for European films outside Europe as a total of six European films succeeded in generating more than 5 mio admissions [*Taken 2* (26.8 mio), *Les Misérables* (15 mio), *The Woman in Black* (10.6 mio), *Intouchables* (7.3 mio), *The Artist* (6.7 mio), *The Iron Lady* (5.6 mio)] while in other years only 1 to 3 films managed to surpass this benchmark.

[11] Please note that admission values for 2011 to 2013 are **pro-forma estimates** for all 12 non-European markets as reported by Rentrak in 2014 and 2015, including China. Pro-forma estimates for admissions to European films in China for the years 2011 to 2013 are based on the European market share in China in 2014 and are adjusted for Chinese market growth and relative performance of European films in the other non-European markets in each year. The accuracy of these estimates could not be validated due a a lack of data.

Like in 2014 the v**ast majority of these admissions** were **generated by first releases**: the **415 European films** estimated to have premiered in 2015 in at least one of the 12 non-European markets covered cumulatively generated 104 mio admissions, accounting for 96% of total admissions while representing 69% of European films on release outside Europe.

With 42.1 mio admissions **North America** remains the **largest market for European films** outside Europe (see Table 8) accounting for 39% of total admissions in non-European markets. Latin American markets proved to be the second most important export region for European films in 2015 with 32.7 mio admission (30%), registering a strong increase from 2014 (+11.5 mio). Thanks to China, which – on a cumulative level – underlined its position as the second largest single market for European films, Asia represented the third largest market region for European films, with 28.2 mio admissions (26%) ahead of Oceania (5.1 mio, 5%). See Chapter 7 for further details on the importance of the individual overseas territories for European films.

Table 8 Admissions to European films on release outside Europe 2011-2015
As tracked in LUMIERE.

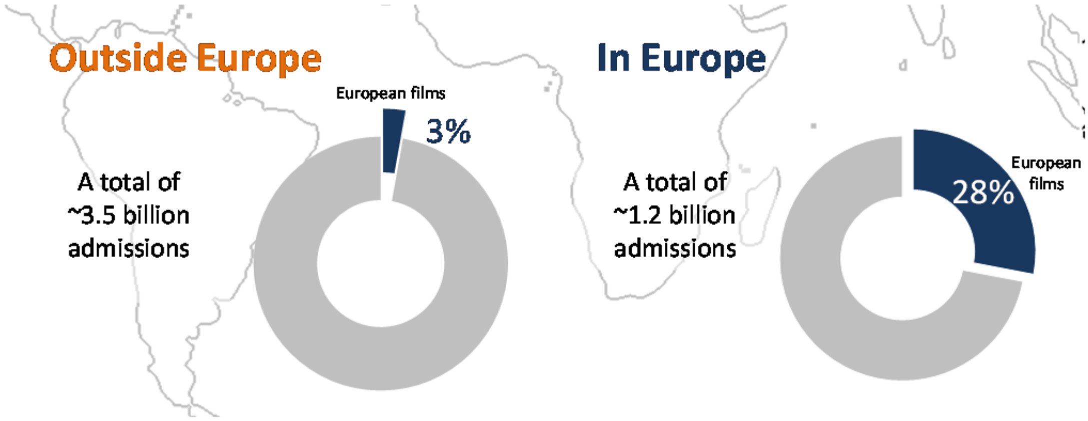
	2011	2012	2013	2014	2015	*Average*
Outside Europe	**70**	**131**	**80**	**82**	**108**	**94**
US & CA	**34.9**	**67.2**	**36.6**	**30.7**	**42.1**	**42.3**
Latin America	**18.4**	**31.1**	**19.0**	**21.2**	**32.7**	**24.5**
AU & NZ	**5.7**	**7.2**	**5.0**	**7.0**	**5.1**	**6.0**
CN & KR	**10.7**	**25.4**	**19.3**	**23.1**	**28.2**	**21.3**
CA	2.7	6.3	3.4	3.4	4.2	4.0
US	32.2	60.8	33.3	27.4	37.9	38.3
AR	2.3	4.2	2.7	1.7	2.9	2.8
BR	5.1	6.6	5.3	6.4	8.1	6.3
CL	0.5	0.7	0.7	0.6	1.1	0.7
CO	1.8	3.0	2.2	2.2	3.8	2.6
MX	8.0	15.3	7.4	9.5	15.4	11.1
VE	0.7	1.3	0.7	0.7	1.4	1.0
AU	4.3	6.0	4.0	5.9	4.1	4.9
NZ	1.4	1.1	1.0	1.1	1.1	1.1
CN est	*7.1*	*13.4*	*12.2*	15.5	22.7	14.2
KR	3.6	12.0	7.1	7.5	5.5	7.1

Source: European Audiovisual Observatory / LUMIERE, comScore

3% market share for European films in terms of admissions outside Europe

With 108 mio admissions generated in 2015 European **films** accounted for around **3%** of the cumulative 3.5 billion admissions generated by all films **in the 12 non-European markets** covered in this report (see Figure 10). **In comparison,** European films claimed a **market share of 28% in Europe,** generating over 335 mio admissions in 2015.

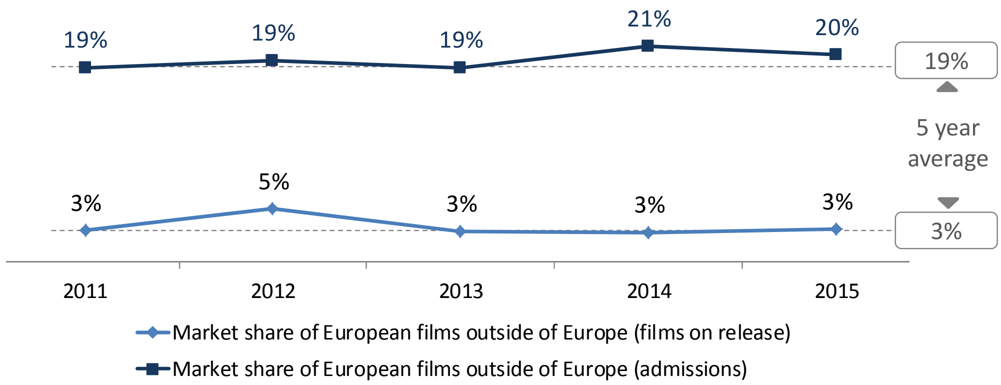
Figure 10 Market share of European films in terms of admissions - 2015 (estimated)



Source: European Audiovisual Observatory / LUMIERE, comScore

As illustrated in Figure 11, the market share of European films outside Europe has remained fairly stable over the past five years: In terms of the number of films tracked to be on release in the 12 non-European markets, European films accounted for 20% in 2015. Though the second highest level in the past five years, this is only marginally above the five-year average value of 19%. In terms of admissions share, European films generally accounted for 3% of the total number of cinema tickets sold in the 12 non-European markets covered. The 2015 market share is hence exactly in line with the five-year average value.

Figure 11 Market share of European films outside Europe 2011-2015 (estimated)
Estimated percentage share of number of films on release / admissions in 12 markets covered.



Source: European Audiovisual Observatory / LUMIERE, comScore

In 2015 the highest market share of European films was registered in New Zealand (8%), Colombia (6%) and Argentina (6%). In contrast the lowest market shares of European films were observed in China (2%), South Korea (3%) and the US (3%). More detailed figures including a time series of market shares in the individual non-European territories are shown in Table 9 below.

A breakdown of European market share by films originating from individual European countries is shown in Figure 12 overleaf.

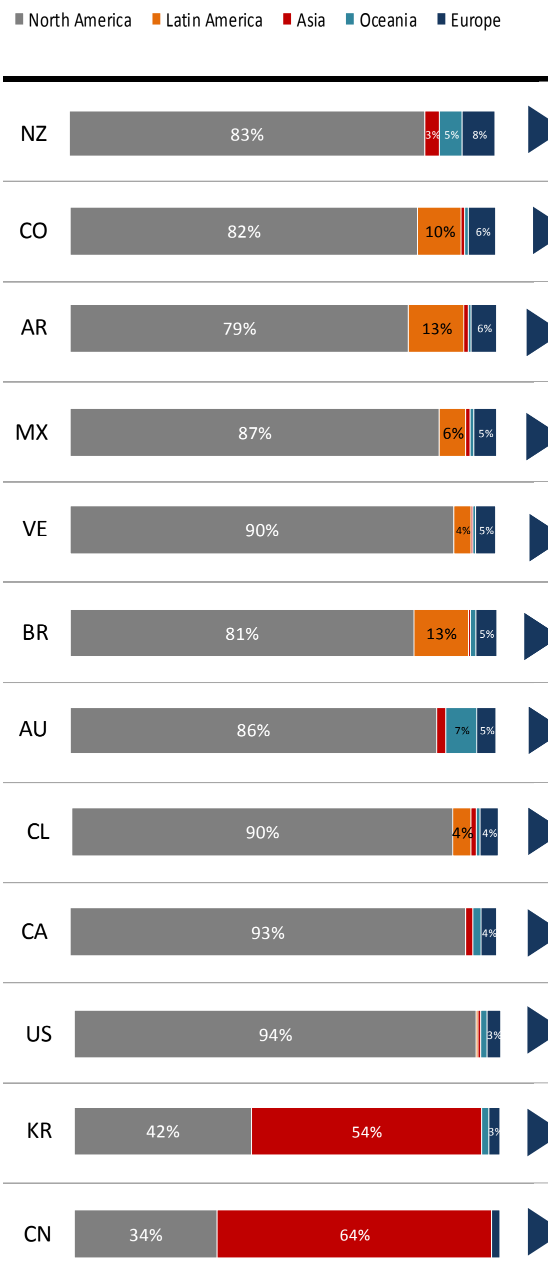
Table 9 Market share of European films in terms of admissions 2011 – 2015 (estimated)

	2011	2012	2013	2014	2015	*Average*
Outside Europe	**3%**	**5%**	**3%**	**3%**	**3%**	**3%**
US & CA	**3%**	**5%**	**3%**	**2%**	**3%**	**3%**
Latin America	**4%**	**6%**	**4%**	**4%**	**5%**	**5%**
AU & NZ	**6%**	**8%**	**6%**	**8%**	**5%**	**7%**
CN & KR	**2%**	**4%**	**2%**	**2%**	**2%**	**3%**
CA	2%	5%	3%	3%	4%	3%
US	3%	5%	3%	2%	3%	3%
AR	6%	9%	6%	4%	6%	6%
BR	4%	5%	4%	4%	5%	4%
CL	3%	4%	4%	3%	4%	3%
CO	5%	8%	5%	5%	6%	6%
MX	4%	7%	3%	4%	5%	5%
VE	3%	5%	2%	2%	5%	3%
AU	5%	7%	5%	8%	5%	6%
NZ	11%	9%	10%	10%	8%	9%
CN	2%	3%	2%	2%	2%	2%
KR	2%	6%	3%	4%	3%	4%

Source: European Audiovisual Observatory / LUMIERE, comScore

Where did European films generate the highest market share?

Figure 12 **Market shares in terms of admissions - by region / country of origin 2015** (estimated)
Markets ranked by market share of European films.



	EUR films	FR	GB	DE	ES	BE	RU	EE	Other
NZ	8%	24%	66%	2%	2%	0%	1%	1%	4%
CO	6%	63%	12%	15%	4%	5%	0%	0%	1%
AR	6%	51%	14%	9%	18%	3%	0%	-	5%
MX	5%	58%	25%	9%	4%	2%	0%	-	3%
VE	5%	33%	23%	30%	4%	3%	0%	-	6%
BR	5%	59%	19%	8%	3%	2%	5%	0	3%
AU	5%	33%	59%	2%	1%	0%	1%	0%	3%
CL	4%	64%	17%	9%	4%	3%	0%	-	1%
CA	4%	36%	58%	1%	3%	1%	0%	-	1%
US	3%	33%	60%	1%	3%	0%	0%	0%	2%
KR	3%	55%	14%	6%	3%	2%	2%	16%	3%
CN	2%	62%	29%	0%	1%	6%	1%	-	1%

Source: European Audiovisual Observatory / LUMIERE, comScore

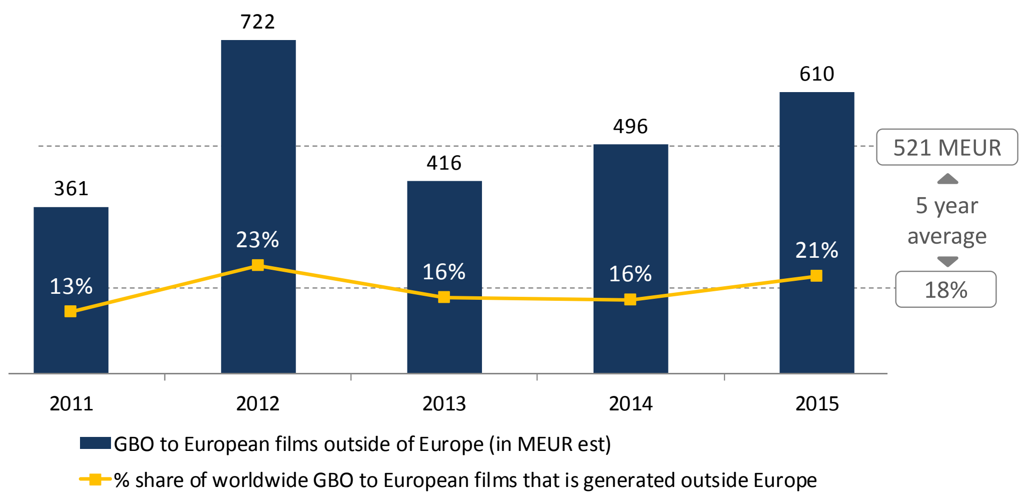
6 GBO to European Films Outside Europe

European films estimated to have generated a GBO of EUR 610 million outside Europe in 2015

Important note: As mentioned in the methodological remarks in chapter 2 LUMIERE only covers admissions but no gross box office data. However in order to provide a ballpark figure in the context of this report, GBO figures are estimated by multiplying the average ticket price in a specific market with admissions generated in that market. These estimates will naturally deviate from actual GBO takings and have to be considered as **rough estimates**.

Applying average ticket prices for the individual markets, European films generated an estimated **gross box office (GBO)** of about **EUR 610 mio outside Europe** (see Figure 13). This means that cumulatively European films earned an estimated 21% of their "worldwide" box office in 2015 outside Europe.

Figure 13 **GBO to European films outside Europe - 2015** (prov)
Pro-forma estimates for cumulative admissions in all 12 non-European sample markets.



Source: European Audiovisual Observatory / LUMIERE, comScore

As shown in Table 10 overleaf, the importance of the North American market for European films is even more pronounced in terms of box office takings, accounting for 52% of total non-European GBO (MEUR 319). China and South Korea contributed about one quarter of total GBO (MEUR 146), followed by Latin American sample markets with cumulative estimated GBO takings of MEUR 100 (16%) ahead of Oceania with MEUR 44 (7%). See chapter 7 for further details on the importance of individual non-European territories.

As GBO has been estimated by applying average local ticket prices to underlying admissions, the estimated market share of European films in terms of GBO corresponds with the estimated market shares in terms of admisssions as shown in Table 9 in chapter 5.

Table 10 **GBO to European films on release outside Europe 2011-2015** (estimated)
Estimates calculated by applying local average ticket prices to admissions as tracked in LUMIERE.

	2011	2012	2013	2014	2015	*Average*
Outside Europe	361	722	416	496	610	521
US & CA	199	420	224	222	319	277
Latin America	62	108	62	80	100	83
AU & NZ	54	72	41	67	44	56
CN & KR	46	122	90	126	146	106
CA	18	41	21	24	32	27
US	180	379	203	197	287	249
AR	9	17	11	8	12	11
BR	22	28	21	30	30	26
CL	2	3	3	3	5	3
CO	5	10	7	8	10	8
MX	22	42	20	30	41	31
VE	2	8	1	1	3	3
AU	41	60	33	58	36	46
NZ	13	11	7	9	8	10
CN est	28	60	53	80	115	67
KR	18	62	37	46	31	39

Source: European Audiovisual Observatory / LUMIERE, comScore

BREAKING IT DOWN …

7 The Most Important Theatrical Markets For European Films Outside Europe

In terms of number of releases

As **first releases** cumulatively accounted for 96% of total admissions to European films outside Europe, it makes sense to analyse non-European markets in terms of European first releases and films on release separately. As can be seen in Table 11, the US, Brazil and Mexico stand out with between 141 and 107 European films being released for the first time in 2015. Other countries with a comparatively large number of European first releases include South Korea (94 first releases), Argentina (88), Canada (84), Australia (78) and Colombia (77). The strongly regulated Chinese featured the lowest number of European first releases with only 16 films tracked to premiere in Chinese cinemas in 2015.

Given the comparatively low number of holdovers / re-releases / on-demand screenings / festival releases etc. tracked in the data set[12], the picture is quite similar with regard to the total number of **films on release:** the US, Brazilian and Mexican markets stand out with 191to 155 European films on release, followed by four markets with around 110 European films films on release. Again, China ranks lowest with only 27 European films on release in 2015.

Table 11 Number of European film releases outside Europe 2015
As tracked in LUMIERE. Ranked by the number of first releases.

#	Market	First releases (estimated)	Other releases[1)] (estimated)	Films on release
1	US - USA	**141**	50	191
2	BR - Brazil	**126**	60	186
3	MX - Mexico	**107**	48	155
4	KR - South Korea	**94**	14	108
5	AR - Argentina	**88**	27	115
6	CA - Canada	**84**	15	99
7	AU - Australia	**78**	37	115
8	CO - Colombia	**77**	32	109
	NZ - New Zealand	**56**	11	67
10	CL - Chile	**48**	6	54
11	VE - Venezuela	**37**	7	44
12	CN - China	**16**	11	27
	Total Outside Europe	**415**	**184**	**599**

[1)] “Other releases” include holdovers, re-releases, “on-demand” screenings, festival screenings, etc. (“repertoire films”)

Source: European Audiovisual Observatory / LUMIERE, comScore

[12] Which can either indicate a lower offer of “repertoire” films outside of Europe and / or less comprehensive coverage of these films with regard to data collection.

In terms of admissions and GBO

Not surprisingly, the **North American market** is also **by far the most important overseas market for European films in terms of admissions**. In 2015 an estimated 37.9 and 4.2 mio tickets were sold to European films in the US and Canada respectively. The US market hence represents the single largest market for European films, accounting for 35% of total admissions to European films outside Europe. The Canadian market accounted for 4%, so that cumulatively 39% of total non-European admissions were generated in the US and Canada (see Table 12).

Despite the very limited number of European releases on its territory, **China** clearly came in as the **second largest market** for European films in terms of admissions with 22.7 mio tickets sold in 2015, accounting for 21% of total admissions to European films in the 12 markets covered. **Mexico, Brazil, and South Korea** follow with admissions between 15.4 and 5.5 mio while European films sold four million or fewer tickets in the remaining four Latin American markets, Canada as well as Australia and New Zealand.

Thanks to a comparatively **high average ticket price,** the **importance of the North American market** is even **more pronounced** in terms of gross box office takings. Based on the data available, the Observatory estimates that European films took MEUR 287 and MEUR 32 at the US and Canadian box offices respectively, accounting for a **cumulative 52%** of total non-European GBO takings. In other words, every other Euro grossed by European films outside Europe was earned on the two North American market. About MEUR 115 were generated in China, followed by Mexico (MEUR 41) and Australia (MEUR 36).

Table 12 Admissions & GBO for European films outside Europe 2015

In mio. Ranked by admissions. GBO estimated based on average ticket prices.

#	Market	Adm to First Releases	Adm to Other Releases	Total Adm	%	GBO (in MEUR)	%
	US & CA	39.8	2.3	**42.1**	***39%***	**319**	***52%***
	Latin America	31.9	0.8	**32.7**	***30%***	**100**	***16%***
	CN & KR est	28.0	0.2	**28.2**	***26%***	**146**	***24%***
	AU & NZ	4.5	0.7	**5.1**	***5%***	**44**	***7%***
1	US - USA	35.8	2.1	**37.9**	**35%**	**287**	**47%**
2	CN - China	22.7	0.1	**22.7**	**21%**	**115**	**19%**
3	MX - Mexico	15.1	0.2	**15.4**	**14%**	**41**	**7%**
4	BR - Brazil	7.9	0.2	**8.1**	**8%**	**30**	**5%**
5	KR - South Korea	5.3	0.2	**5.5**	**5%**	**31**	**5%**
6	CA - Canada	4.0	0.3	**4.2**	**4%**	**32**	**5%**
7	AU - Australia	3.6	0.5	**4.1**	**4%**	**36**	**6%**
8	CO - Colombia	3.8	0.0	**3.8**	**4%**	**10**	**2%**
9	AR - Argentina	2.8	0.1	**2.9**	**3%**	**12**	**2%**
10	VE - Venezuela	1.3	0.2	**1.4**	**1%**	**3**	**0%**
11	CL - Chile	1.1	0.0	**1.1**	**1%**	**5**	**1%**
12	NZ - New Zealand	0.9	0.2	**1.1**	**1%**	**8**	**1%**
	Outside Europe	**104.1**	**4.0**	**108.2**	***100%***	**610**	***100%***

Source: European Audiovisual Observatory, comScore

8 What Were the Leading European Film Export Countries?

Important note: As specified in the methodological remarks, this report focuses on providing a „big picture“ overview of the circulation of European films as a whole rather than analysing the film exports of individual European countries which is beyond the scope of this report as it may require different – sometimes country specific – methodological choices. Please note that in particular because of the Observatory’s choices regarding the allocation of a unique country of origin based on the majority financing share as well as the exclusion of films financed with incoming foreign investment the country specific data presented in this report, and in particular in this chapter, may differ significantly from data published by national sources such as the BFI or UniFrance. For a proper analysis of the export of films originating from a specific country, please refer to national sources.

In terms of releases

In 2015, as in past years, **France and the UK exported by far the largest number of films** to non-European territories among the European countries. As shown in Table 14 overleaf, France leads both in terms of first releases as well as total films on release with 127 French first releases throughout the year and a total of 201 French films on release in at least one of the 12 non-European markets covered in this report. France is followed by the UK with 92 first releases outside Europe and a total of 116 films on release. On a cumulative basis French and UK films accounted for 53% of the total number of European films on release outside Europe. In other words one out of two European films screened outside Europe in 2015 were majority produced in either France or the UK.

Spain ranked third in 2015 with 39 first releases and a total of 58 films on release, followed by Germany and Italy with 35 and 22 first releases and a total 49 and 37 films on release respectively. In addition, three Scandinavian countries (Sweden, Denmark, Norway) as well as Austria and Russia (ex-aequo with Belgium) made it onto the top 10 list of European film export countries with 11 to 9 films on release outside Europe in 2015. On a cumulative level the top 10 European countries accounted for 87% of the total number of European films on release outside Europe.

In terms of admissions

The picture appears even more concentrated when it comes to admissions generated by European films: On a cumulative level French and UK films accounted for almost 87% of total admissions to European films outside Europe in 2015.

Thanks to the success of *Taken 3* (FR) which generated 25.6 mio ticket sales outside Europe in 2015, along with *The Little Prince* (FR/IT) (13.1 mio) and *The Transporter Refueled* (FR/CN/BE) (7.1 mio), **France** took **first rank** with French films cumulatively selling 51.5 mio tickets **accounting for 48% of total admissions** to European films in the 12 non-European markets covered in this report (see Table 14).

UK films, which are traditionally strong in non-European markets, came in second place, with 42.3 mio admissions (**39% of total admissions** to European films). Successful UK productions included *Paddington* (13.1 mio) and *The Woman in Black 2* (5.5 mio).

France and the UK were followed at a distance by Germany whose productions cumulatively generated 4.2 mio ticket sales in 2015 (4%) ahead of Spain (3.3 mio), Belgium (2.5 mio), Russia (1.1 mio) and Estonia (0.9 mio) thanks to the release of the Estonian / Finnish war drama *1944* in South Korea market where it sold 900 000 tickets.

A list of the top 100 European films in terms of admissions generated outside Europe in 2015 is shown in Chapter 11.

Table 13 Number of European film releases outside Europe by country of origin 2015

Ranked by number of films on release outside Europe as tracked in LUMIERE.

Rank	Country of origin	First release (estimated)	Other releases (estimated)	Films on release outside Europe	% share
1	FR - France	127	74	**201**	**34%**
2	GB – UK	92	24	**116**	**19%**
3	ES - Spain	39	19	**58**	**10%**
4	DE - Germany	35	14	**49**	**8%**
5	IT - Italy	22	15	**37**	**6%**
6	SE - Sweden	7	8	**15**	**3%**
7	DK - Denmark	11	2	**13**	**2%**
8	NO - Norway	11	1	**12**	**2%**
9	AT - Austria	6	5	**11**	**2%**
10	RU - Russia	8	1	**9**	**2%**
	BE - Belgium	5	4	**9**	**2%**
12	CZ - Czech Rep.	3	5	**8**	**1%**
13	NL - Netherlands	5	2	**7**	**1%**
14	CH - Switzerland	5	1	**6**	**1%**
	IE - Ireland	4	2	**6**	**1%**
	HU - Hungary	5	1	**6**	**1%**
17	PT - Portugal	5	-	**5**	**1%**
18	FI - Finland	4	-	**4**	**1%**
	LT - Lithuania	4	-	**4**	**1%**
20	PL - Poland	2	1	**3**	**1%**
-	GE - Georgia	2	1	**3**	**1%**
22	RO - Romania	-	2	**2**	**0%**
	IS - Iceland	2	-	**2**	**0%**
	BG - Bulgaria	2	-	**2**	**0%**
	UA - Ukraine	2	-	**2**	**0%**
	EE - Estonia	2	-	**2**	**0%**
	GR - Greece	2	-	**2**	**0%**
28	TR - Turkey	1	-	**1**	**0%**
	BY - Belarus	-	1	**1**	**0%**
	RS - Serbia	-	1	**1**	**0%**
	LU - Luxembourg	1	-	**1**	**0%**
	HR - Croatia	1	-	**1**	**0%**
	Total Europe	**415**	**184**	**599**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 14 Admissions to European films outside Europe by country of origin 2015

Ranked by total admissions outside Europe as tracked in LUMIERE.

Rank	Country of origin	Admissions to First Releases (estimated)	Admissions to Other releases (estimated)	Admissions outside Europe	% share
1	FR - France	51 394 585	107 913	**51 502 498**	**48%**
2	GB - UK	42 148 784	123 196	**42 271 980**	**39%**
3	DE - Germany	4 238 577	9 414	**4 247 991**	**4%**
4	ES - Spain	3 236 597	108 507	**3 345 104**	**3%**
5	BE - Belgium	2 455 503	1 371	**2 456 874**	**2%**
6	RU - Russia	1 098 220	23	**1 098 243**	**1%**
7	EE - Estonia	945 926	0	**945 926**	**1%**
8	IT - Italy	571 601	28 811	**600 412**	**1%**
9	AT - Austria	257 347	5 638	**262 985**	**0%**
10	SE - Sweden	232 457	10 153	**242 610**	**0%**
11	IE - Ireland	216 438	2 888	**219 326**	**0%**
12	PL - Poland	166 606	467	**167 073**	**0%**
13	CZ - Czech Rep.	104 960	26 608	**131 568**	**0%**
14	HU - Hungary	93 359	8 766	**102 125**	**0%**
15	DK - Denmark	94 920	782	**95 702**	**0%**
16	NO - Norway	81 651	18	**81 669**	**0%**
17	CH - Switzerland	60 677	3 152	**63 829**	**0%**
18	BG - Bulgaria	62 136	-	**62 136**	**0%**
19	LU - Luxembourg	55 808	-	**55 808**	**0%**
20	FI - Finland	51 069	-	**51 069**	**0%**
21	NL - Netherlands	45 362	123	**45 485**	**0%**
22	TR - Turkey	38 057	-	**38 057**	**0%**
23	UA - Ukraine	34 374	-	**34 374**	**0%**
24	IS - Iceland	19 288	-	**19 288**	**0%**
25	GR - Greece	11 941	-	**11 941**	**0%**
26	PT - Portugal	9 228	-	**9 228**	**0%**
27	HR - Croatia	3 214	-	**3 214**	**0%**
28	LT - Lithuania	2 625	-	**2 625**	**0%**
29	GE - Georgia	2 081	95	**2 176**	**0%**
30	RO - Romania	-	794	**794**	**0%**
31	RS - Serbia	-	364	**364**	**0%**
32	BY - Belarus	-	70	**70**	**0%**
	Total Europe	**107 733 391**	**439 153**	**108 172 544**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

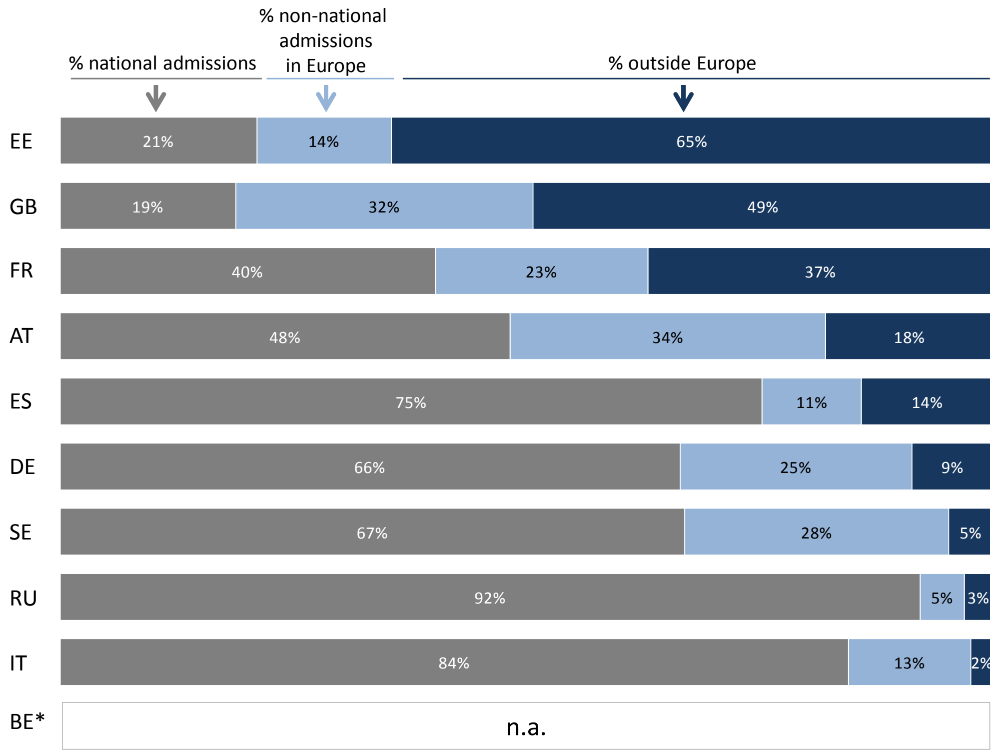
In terms of "importance" of non-European markets

How important are admissions outside Europe for the various European countries? Figure 14 shows the percentage shares of admissions in national, non-national European and non-European markets for each of the top 10 European film exporting countries in terms of admissions outside Europe as identified in Table 14 on the previous page. The complete breakdown for all European countries can be found in Table 15 overleaf.

In 2015, three out of the top 10 European film exporting countries generated 37% or more of their total theatrical admissions on the 12 non-European markets covered in this report: Due to the export success of a single film, war drama *1944* (EE/FI) on the one hand and a small national market on the other hand, Estonia registered the highest "exposure" to non-European markets in 2015, with an estimated 65% of total "worldwide" admissions to Estonian films generated outside Europe. Structurally more significant, the UK and the French film industries clearly were most "exposed" to the distribution of their films outside Europe with an estimated 49% and 37% of total admissions to British and French films generated outside Europe.

In 2015 only two other European countries generated more than 10% of their "worldwide" admissions outside Europe: Austria (18%, e.g. *Ich seh, ich seh*) and Spain (14%, e.g. *The Gunman*).

Figure 14 Breakdown of "worldwide" admissions to the top 10 European film exporting countries by origin of admissions generation - 2015 (estimated)
Ranked by share of admissions outside Europe.



* The breakdown for Belgian films could not be estimated due to insufficient availability of admissions data on the Belgian market which would lead to an underestimation of national admissions and consequently an overestimation of the percentage share of non-national admissions both in as well as outside Europe.

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 15 Admissions breakdown for European films 2015 – "national" vs. "non-national"
As tracked in LUMIERE. Ranked alphabetically. Estimated.

Country of origin		% Share – National adm	% Share- Non-nat. adm	*% Share – Non-nat. adm in Europe*	*% Share – Non-nat. adm outside Europe*
AT	Austria	**48%**	**52%**	*34%*	*18%*
BG	Bulgaria	**25%**	**75%**	*55%*	*20%*
CH	Switzerland	**66%**	**34%**	*29%*	*6%*
CZ	Czech Republic	**75%**	**25%**	*20%*	*4%*
DE	Germany	**66%**	**34%**	*25%*	*9%*
DK	Denmark	**76%**	**24%**	*22%*	*2%*
EE	Estonia	**21%**	**79%**	*14%*	*65%*
ES	Spain	**75%**	**25%**	*11%*	*14%*
FI	Finland	**74%**	**26%**	*24%*	*1%*
FR	France	**40%**	**60%**	*23%*	*37%*
GB	United Kingdom	**19%**	**81%**	*32%*	*49%*
GR	Greece	**95%**	**5%**	*4%*	*2%*
HR	Croatia	**60%**	**40%**	*37%*	*3%*
HU	Hungary	**53%**	**47%**	*37%*	*10%*
IS	Iceland	**18%**	**82%**	*77%*	*6%*
IT	Italy	**84%**	**16%**	*13%*	*2%*
LT	Lithuania	**91%**	**9%**	*9%*	*1%*
LV	Latvia	**99%**	**1%**	*1%*	*0%*
NL	Netherlands	**91%**	**9%**	*9%*	*1%*
NO	Norway	**75%**	**25%**	*23%*	*2%*
PL	Poland	**95%**	**5%**	*3%*	*2%*
PT	Portugal	**89%**	**11%**	*11%*	*1%*
RO	Romania	**80%**	**20%**	*20%*	*0%*
RU	Russia	**92%**	**8%**	*5%*	*3%*
SE	Sweden	**67%**	**33%**	*28%*	*5%*
SI	Slovenia	**69%**	**31%**	*31%*	*0%*
SK	Slovak Rep.	**82%**	**18%**	*18%*	*0%*
TR	Turkey	**96%**	**4%**	*4%*	*0%*
	Total Europe	**55%**	**45%**	***21%***	***24%***

Remark: This breakdown cannot be provided for the following countries due to a lack of (sufficient) 2015 admissions data in their respective home markets: Bosnia-Herzegovina (BA), Belgium (BE), Belarus (BY), Cyprus (CY), Georgia (GE), Luxemburg (LU), Lichtenstein (LI), Montenegro (ME), FYROM (MK), Serbia (RS), Ukraine (UA)

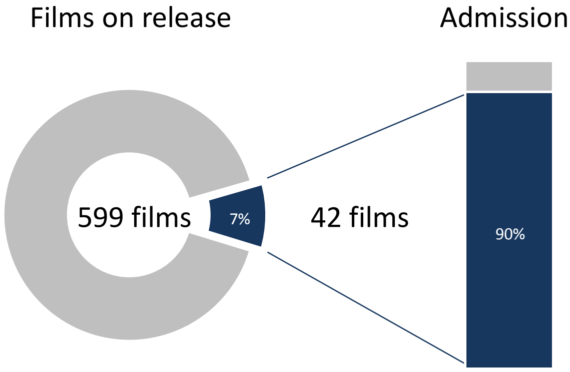
Source: European Audiovisual Observatory / LUMIERE, comScore

9 Concentration of Admissions Outside Europe

Evidently, the cumulative figures for European films do not offer any information about how many European films actually generated a significant number of admissions outside Europe. This chapter takes a closer look at the concentration of admissions among European films. It reveals that the number of European films generating large amounts of ticket sales is actually quite small.

As shown in Figure 15, 42 films, i.e. only 9% of the 599 films on release, accounted for 90% of total admissions generated by European films outside Europe in 2015. In other words, nine out of ten tickets sold for European films outside Europe were sold for a screening of one of only 42 European films, which cumulatively generated 97.1 mio ticket sales. The remaining 557 European films on release (93% of the total number of European films on release outside Europe) cumulatively generated only 11.1 mio admissions.

Figure 15 Concentration of admissions to European films outside Europe 2015



Source: European Audiovisual Observatory / LUMIERE, comScore

85% of European films generated fewer than 50 000 ticket sales outside Europe in 2015

Yet another way to look at the concentration of admissions among the various European films is to count the number of films by admissions brackets. As can be seen in Table 16 overleaf, the vast majority of European films (85%) generated fewer than 50 000 admissions outside Europe and one in four European films (26%) sold fewer than 1 000 tickets in 2015.

A total of six European “blockbusters” managed to sell more than five million tickets outside Europe in 2015. This stands in sharp contrast to 2014, where only one European film, namely Luc Besson’s English-language thriller *Lucy,* surpassed this benchmark. Only in 2012 did that many European films manage to generate more than five million admissions outside Europe. The years 2015 and 2012 clearly stand out as exceptional years in this regard.

Another eight European films managed to generate between one and five million admissions, while further 13 films sold between 500 000 and one million tickets and 41 films sold between 100 000 and 500 000 tickets.

Table 16 Number and admissions of European films by „admissions brackets“ 2015

Figures may not sum to totals due to rounding.

Admissions bracket	Number of films	% share	Cumulative admissions outside Europe (in mio)	% share	Average admissions within bracket
[5 mio - [	6	1%	66.8	62%	11.1 mio
[1 mio - 5 mio[	8	2%	15.6	14%	2.0 mio
[500' - 1 mio[	13	2%	8.9	8%	688 000
[100' - 500'[	41	8%	10.5	10%	257 000
[50' - 100'[	40	6%	2.8	3%	71 000
[10' - 50'[	113	21%	2.6	2%	24 000
[1' - 10'[	191	34%	0.7	1%	3 900
[1 - 1'[	187	26%	0.1	0%	314
Grand Total	**599**	**100%**	**108.2**	**100%**	**181 000**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 17 Number of European films by „admissions brackets“ 2011-2015

Admissions bracket	2011	2012	2013	2014	2015	5 year average
[5 mio - [	3	6	3	1	6	4
[1 mio - 5 mio[	6	10	9	12	8	9
[500' - 1 mio[	7	12	8	13	13	11
[100' - 500'[	41	46	36	49	41	43
[50' - 100'[	35	30	34	29	40	34
[10' - 50'[	111	103	110	113	113	110
[1' - 10'[	137	184	206	210	191	186
[1 - 1'[	87	118	160	162	187	143
Grand Total	**427**	**509**	**566**	**589**	**599**	**538**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 18 Admissions to European films by „admissions brackets“ 2011-2015 – in mio

Admissions bracket	2011	2012	2013	2014	2015	5 year average
[5 mio - [	30.2	72.0	23.0	31.9	66.8	44.8
[1 mio - 5 mio[	11.3	22.3	25.3	24.6	15.6	19.8
[500' - 1 mio[	4.8	7.8	5.7	8.8	8.9	7.2
[100' - 500'[	10.6	9.8	7.9	11.2	10.5	10.0
[50' - 100'[	2.4	2.1	2.3	2.1	2.8	2.4
[10' - 50'[	2.6	2.6	2.6	2.6	2.6	2.6
[1' - 10'[	0.6	0.7	0.8	0.8	0.7	0.7
[1 - 1'[	0.0	0.0	0.1	0.1	0.1	0.0
Grand Total	**62.6**	**117.5**	**67.7**	**82.0**	**108.2**	**87.6**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 19 Admissions to European films by „admissions brackets“ 2011-2015 – in %

Admissions bracket	2011	2012	2013	2014	2015	5 year average
[5 mio - [	48%	61%	34%	39%	62%	49%
[1 mio - 5 mio[	18%	19%	37%	30%	14%	24%
[500' - 1 mio[	8%	7%	8%	11%	8%	8%
[100' - 500'[	17%	8%	12%	14%	10%	12%
[50' - 100'[	4%	2%	3%	3%	3%	3%
[10' - 50'[	4%	2%	4%	3%	2%	3%
[1' - 10'[	1%	1%	1%	1%	1%	1%
[1 - 1'[	0%	0%	0%	0%	0%	0%
Grand Total	**62.6**	**117.5**	**67.7**	**82.0**	**108.2**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

Top 10 films account for 71% of total non-European admissions to European films

Another way to measure admission concentration levels is shown in Table 20 which measures cumulative market share for various „top brackets“: With 25.6 mio admissions *Taken 3*, the most successful European film outside Europe in 2015, accounted on its own for almost a quarter of cumulative admissions to European films in the 12 non-European markets covered. The top 10 films (2% of the European films on release outside Europe) cumulatively accounted for 71% of total admissions, the top 50 films for 92% and the top 100 films for 96%.

Given the comparatively low number of European films on release outside Europe, the concentration level is naturally significantly higher compared to the European market where the top 100 films accounted for an estimated 61% of total European admissions. The two can therefore not be directly compared.

Table 20 Concentration of admissions to European films by „top brackets“ 2015
Cumulative admissions in mio.

Top bracket	Number of films	% share	Cumulative admissions outside Europe	% share
Top 1	1	0%	25.6	24%
Top 10	10	2%	76.9	71%
Top 50	50	8%	99.1	92%
Top 100	100	17%	104.3	96%
Other	499	83%	3.8	4%
Total	**599**	**100%**	**108.2**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

As shown in Table 21 these concentration levels are more or less in line with the five year average results for the time period 2011 to 2015. In 2014 the very strong perfomance of the top ranking film (*Lucy*) which on its own sold 31.9 mio tickets outside Europe and hence accounted for 39% of total admissions has to be considered exceptional.

Table 21 Admissions to European films by „top brackets“ 2011-2015 – in %

Admissions bracket	2011	2012	2013	2014	2015	5 year average
Top 1	30%	23%	14%	39%	24%	26%
Top 10	68%	71%	67%	65%	71%	68%
Top 50	90%	92%	90%	89%	92%	91%
Top 100	95%	97%	95%	96%	96%	96%
Other	5%	3%	5%	4%	4%	4%
Total (in mio)	**62.6**	**117.5**	**67.7**	**82.0**	**108.2**	**87.6**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 22 Admissions to European films by „top brackets" 2011-2015 – in mio

Admissions bracket	2011	2012	2013	2014	2015	5 year average
Top 1	18.9	26.8	9.6	31.9	25.6	22.6
Top 10	42.4	83.7	45.6	53.1	76.9	60.3
Top 50	56.0	108.5	61.3	72.7	99.1	79.5
Top 100	59.7	113.9	64.7	78.4	104.3	84.2
Other	2.9	3.5	3.1	3.7	3.8	3.4
Total	**62.6**	**117.5**	**67.7**	**82.0**	**108.2**	**87.6**

Source: European Audiovisual Observatory / LUMIERE, comScore

10 Diversity of European Film Offering Outside Europe

Important note: Assessing diversity in a more qualitative sense is a complex task which is beyond the scope of this report. As specified in the methodological remarks term “film offering” refers to the number of films on release, which is the most basic indicator for measuring the theatrical film offering in a country and - in itself - has limited informational value with regard to how many European films were really accessible to audiences. There are, however, a few aspects that can be addressed by an analysis of the data sample, such as the question as to whether the portfolio of European films differed significantly from one international market to another or whether more or less the same films were shown across non-European markets. This chapter furthermore provides a breakdown by country of origin and age of productions.

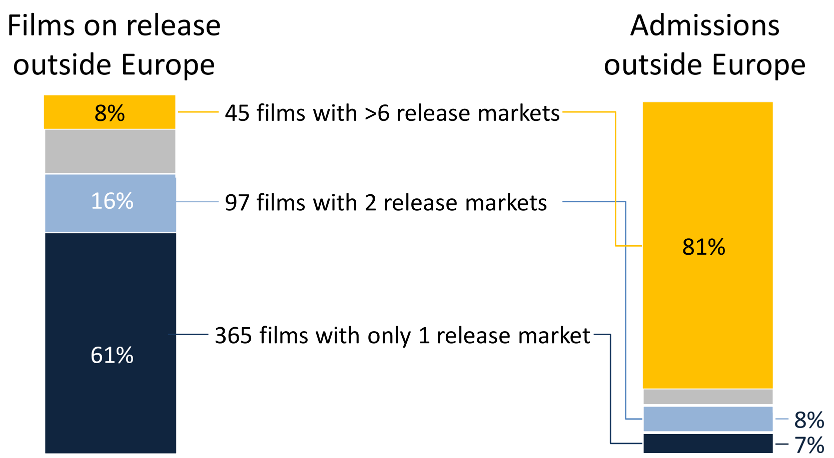
European film portfolio varies significantly from one market to the next

As illustrated in Figure 16 and Table 23 overleaf, 61% of the 599 European films on theatrical release outside Europe in 2015 were screened in only one single territory (365 films). Another 97 films (16%) were on release only in two markets.

On the other hand a total of 45 European films (8%) were on release six or more non-European markets in 2015. This is the highest level observed in the past five years (see Table 24). These 45 films cumulatively accounted for 81% of the total admissions to European films outside Europe.

These figures suggest that – even though growing - only a very small number of European films managed to be released in a large number of non-European territories while the vast majority of films were released in only one or two markets. From a „diversity“ point of view the data hence suggest that the portfolio of European films on release outside Europe actually varies to a large extent from one territory to another.

Figure 16 **Share of European films with only 1 or 2 non-European release markets 2015**



Source: European Audiovisual Observatory / LUMIERE, comScore

Table 23 Concentration of European films outside Europe by number of release markets 2015

Nr. of non-European release markets	European films	% share	Cumulative admissions	% share	Average admissions
1	365	61%	4.7	4%	13 000
2	97	16%	8.0	7%	83 000
3	46	8%	3.0	3%	66 000
4	26	4%	1.5	1%	56 000
5	20	3%	3.5	3%	175 000
6	10	2%	2.5	2%	247 000
7	10	2%	12.9	12%	1 289 000
8	7	1%	3.9	4%	563 000
9	8	1%	9.7	9%	1 212 000
10	3	1%	8.4	8%	2 812 000
11	3	1%	4.2	4%	1 390 000
12	4	1%	45.9	42%	11 471 000
Total	**599**	**100%**	**108.2**	**100%**	**181 000**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 24 European film releases outside Europe by number of release markets 2011-2015

Nr. of non-European release markets	2011	2012	2013	2014	2015	5 year average
1	274	303	366	368	365	335
2	75	109	105	98	97	97
3	33	33	38	47	46	39
4	16	22	17	29	26	22
5	9	14	16	11	20	14
6	8	8	7	14	10	9
7	6	3	4	7	10	6
8	1	4	7	6	7	5
9	2	6	3	4	8	5
10	2	3	3	3	3	3
11	1	4	0	1	3	2
12	~	~	~	1	4	3
Total	**427**	**509**	**566**	**589**	**599**	**538**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 25 **Admissions to European films outside Europe by number of release markets 2011-2015 – in mio**

Nr. of non-European release markets	2011	2012	2013	2014	2015	5 year average
1	6.7	5.1	3.9	4.9	4.7	5.1
2	5.4	7.8	3.8	5.0	8.0	6.0
3	2.0	4.2	2.7	7.6	3.0	3.9
4	1.8	21.3	4.2	5.6	1.5	6.9
5	3.9	4.7	9.5	3.5	3.5	5.0
6	8.4	3.9	3.1	2.3	2.5	4.0
7	3.9	0.9	10.3	3.0	12.9	6.2
8	0.7	1.4	15.6	4.2	3.9	5.2
9	19.4	9.3	2.9	6.5	9.7	9.6
10	4.4	20.9	11.7	3.7	8.4	9.8
11	6.1	37.7	0.0	3.7	4.2	10.3
12	~	~	~	31.9	45.9	38.9
Total	**62.6**	**117.5**	**67.7**	**82.0**	**108.2**	**87.6**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 26 **Admissions to European films outside Europe by number of release markets 2011-2015 – in %**

Nr. of non-European release markets	2011	2012	2013	2014	2015	5 year median
1	11%	4%	6%	6%	4%	6%
2	9%	7%	6%	6%	7%	7%
3	3%	4%	4%	9%	3%	5%
4	3%	18%	6%	7%	1%	7%
5	6%	4%	14%	4%	3%	6%
6	13%	3%	5%	3%	2%	5%
7	6%	1%	15%	4%	12%	8%
8	1%	1%	23%	5%	4%	7%
9	31%	8%	4%	8%	9%	12%
10	7%	18%	17%	5%	8%	11%
11	10%	32%	0%	5%	4%	10%
12	~	~	~	39%	42%	41%
Total	**62.6**	**117.5**	**67.7**	**82.0**	**108.2**	**87.6**

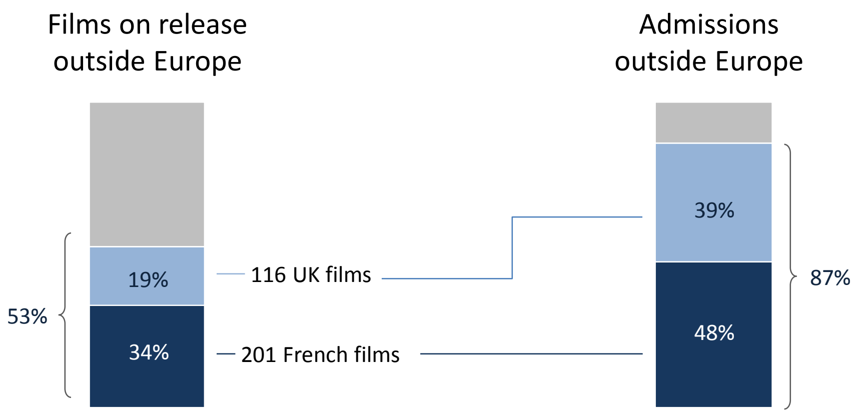
Source: European Audiovisual Observatory / LUMIERE, comScore

French and UK films represent majority of European “film exports” outside Europe

The breakdown of the number of European films on release as well as admissions to them by country of origin is already commented on in Chapter 7. In the context of looking into the “diversity” of the European theatrical film offering outside Europe it can be noted that France and the UK “exported” by far the largest number of films among the European countries and cumulatively accounted for every second European film screened outside Europe in 2015, as illustrated in Figure 17.

In terms of admissions French and UK films cumulatively accounted for almost 87% of total admissions to European films outside Europe in 2015. In other words, almost nine in ten tickets sold for European films were for French or UK films. Technically speaking, this is due to the fact that the vast majority of European “blockbusters” were majority produced in one of these two countries.

Figure 17 Share of French and UK films on non-European markets 2015 (estimated)



Source: European Audiovisual Observatory / LUMIERE, comScore

Recent productions account for 54% of the number of films on release and 95% of admissions

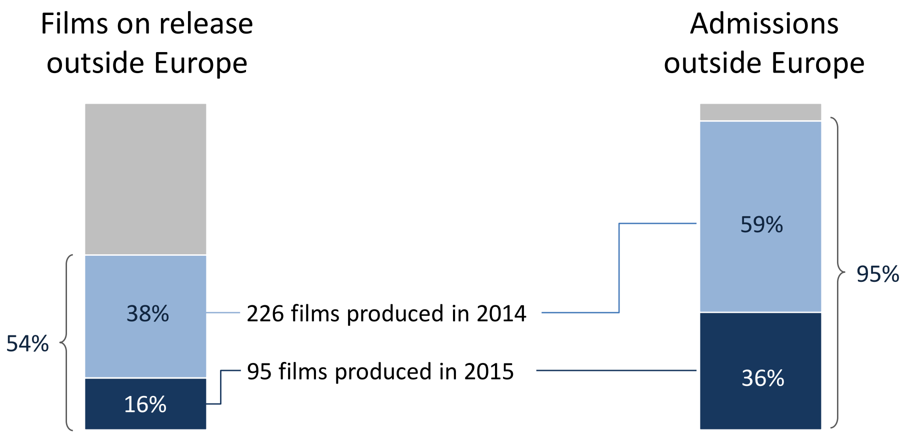
How diverse is the European film offering in terms of the age of the films? Are only recent productions released outside Europe or is there demand for older productions?

As illustrated in Figure 18 and Table 27, recent productions, i.e. films produced in 2014 or 2015, accounted for „only“ 54% of the European films on release but accounted for 95% of total admissions in 2015. Three to five year old productions accounted for another 32% (199 films) of European films on release but cumulatively generated only about 5% of total admissions.

88 European films produced before or in 2010 were on release outside Europe in 2015 . These figures suggest that while the commercially relevant market is practically dominated by the export of recent productions, there appears to be a certain demand for screening a limited number of older European films which do not, however, generate large numbers of admissions.

The figures also show a certain time lag with a significant number of European films being released outside Europe one or two years after their production year.

Figure 18 Share of „recent“ European films on non-European release markets 2015



Source: European Audiovisual Observatory / LUMIERE, comScore

Table 27 Concentration of European films outside Europe by production year 2015

Production Year	Films on release	%	Cumulative %	Admissions (in mio)	%	Cumulative %
2015	95	16%	16%	38 975 759	36%	36%
2014	226	38%	54%	63 460 969	59%	95%
2013	122	20%	74%	5 068 388	5%	99%
2012	47	8%	82%	298 375	0%	100%
2011	21	4%	85%	96 325	0%	100%
[2001-2010]	31	5%	90%	120 275	0%	100%
[1991-2000]	10	2%	92%	11 329	0%	100%
[1900-1990]	47	8%	100%	141 124	0%	100%
TOTAL	**599**	**100%**	**-**	**108.2**	**100%**	**-**

Source: European Audiovisual Observatory / LUMIERE, comScore

11 Top 100 European Films Outside Europe

Table 28 Short profiles of top 5 European films outside Europe 2015

Admissions refer to cumulative admissions up until Dec 2015. „Int.“ stands for 12 non-European markets covered in this report.

1

Taken 3 **(2014)**
Country of origin: FR

Director: Olivier Megaton

European admissions: 10.5 mio.

Int. admissions: 25.6 mio.

Int. release markets: 12

Genre: Action, Thriller

Language: English

Plot: Ex-government operative Bryan Mills is accused of a ruthless murder he never committed. As he is tracked and pursued, Mills brings out his particular set of skills to find the true killer and clear his name.

2

Paddington **(2014)**
Country of origin: GB / FR

Director: Paul King

European admissions: 16.2 mio.

Int. admissions: 13.1 mio.

Int. release markets: 12

Genre: Comedy, Family, Animation

Language: English

Plot: A young Peruvian bear travels to London in search of a home. Finding himself lost and alone at Paddington Station, he meets the kindly Brown family, who offer him a temporary haven.

3

The Little Prince **(2015)**
Country of origin: FR / IT

Director: Mark Osborne

European admissions: 4.2 mio.

Int. admissions: 10.3 mio.

Int. release markets: 7

Genre: Animation, Adventure

Language: English

Plot: A girl lives in a very grown-up world with her mother. Her neighbour, the Aviator, introduces the girl to an extraordinary world where anything is possible, the world of the Little Prince.

4

The Transporter Refuelled **(2015)**
Country of origin: FR / CN / BE

Director: Camille Delamarre

European admissions: 2.6 mio.

Int. admissions: 7.1 mio.

Int. release markets: 10

Genre: Action, Crime, Thriller

Language: English

Plot: In the south of France, former special-ops mercenary Frank Martin enters into a game of chess with a femme-fatale and her three sidekicks who are looking for revenge against a sinister Russian kingpin.

5

The Woman in Black 2 **(2013)**
Country of origin: GB inc / US / CA

Director: Tom Harper

European admissions: 1.9 mio.

Int. admissions: 5.5 mio.

Int. release markets: 9

Genre: Drama, Horror, Thriller

Language: English

Plot: 40 years after the first haunting at Eel Marsh House, a group of children evacuated from WWII London arrive, awakening the house's darkest inhabitant.

Source: European Audiovisual Observatory / LUMIERE, comScore, IMDB

Table 29 Top 100 European films in terms of admissions generated outside Europe 2015 (estimated)

N°	Film	Countries of origin	Prod. Year	# of release markets	Adm 2015 outside Europe	Adm 2015 – US/CA	Adm 2015- Latin America	Adm 2015– AU/NZ	Adm 2015– CN/KR
1	Taken 3	FR	2014	12	25 555 179	10 587 951	6 780 001	1 234 998	6 952 229
2	Paddington	GB / FR	2014	12	13 149 127	9 041 943	177 645	418 325	3 511 214
3	The Little Prince	FR / IT	2015	7	10 302 704		5 327 759		4 974 945
4	The Transporter Refuelled	FR / CN / BE	2015	10	7 057 001	1 901 503	1 188 344	33 625	3 933 529
5	The Woman in Black 2 …	GB INC / US / CA	2014	9	5 519 422	3 143 692	2 366 773		8 957
6	Shaun the Sheep Movie	GB	2015	12	5 249 396	2 298 458	556 683	527 241	1 867 014
7	The Theory of Everything	GB INC / US	2014	11	3 724 701	1 450 477	1 702 986	568 347	2 891
8	Brooklyn	GB / IE / CA	2015	2	2 320 758	2 320 758			
9	Concussion	GB / AU / US	2015	2	2 066 473	2 066 473			
10	The House of Magic	BE	2013	8	1 950 553		577 679	105	1 372 769
11	The Gunman	ES / GB / FR / US	2015	12	1 928 659	1 265 094	384 006	49 292	230 267
12	La belle et la bête	FR / DE	2014	6	1 352 034		1 352 034		
13	Amy	GB / US	2015	9	1 206 303	997 347	46 561	162 395	
14	La famille Bélier	FR / BE	2014	10	1 081 422	163 454	776 303	28 224	113 441
15	Love, Rosie	DE / GB	2014	9	953 674	2 424	946 722	301	4 227
16	Ooops! Noah is Gone...	DE / BE / LU / IE	2015	7	916 381		691 314	5 473	219 594
17	1944	EE / FI	2015	1	900 000				900 000
18	Suffragette	GB	2015	9	738 815	552 459	85 490	100 866	
19	Escobar: Paradise Lost	FR / ES	2014	8	704 888	23 226	680 216	1 446	
20	Rush	GB INC / US / DE	2013	1	657 107				657 107
21	Der 7bte Zwerg	DE	2014	7	651 534		617 882		33 652
22	Miss You Already	GB	2015	7	630 491	137 919	330 628	161 944	
23	Qu'est-ce qu'on a fait au …?	FR	2014	6	608 745		607 339	1 406	
24	Beijing, New York	GB / CN / US	2015	1	580 553				580 553
25	Mr. Turner	GB / DE / FR	2014	5	549 451	395 208		141 106	13 137
26	The Danish Girl	GB / US / BE / DK / DE	2015	2	534 572	534 572			
27	We Are Your Friends	GB / FR / US	2015	8	518 861	426 029	23 756	35 609	33 467
28	Snezhnaya koroleva 2.	RU	2014	2	485 833		396 557		89 276
29	Amazonia	FR / BR	2013	3	474 647			562	474 085
30	Learning to Drive	GB / US	2014	5	469 388	408 972		58 534	1 882
31	Phoenix	DE / PL	2014	5	455 663	372 630	67 031	16 002	
32	Carol	GB / US	2015	2	450 905	450 905			
33	The Salt of the Earth	FR / BR / IT	2014	9	399 784	157 918	214 334	21 466	6 066
34	Truman	ES / AR	2015	2	399 265		399 265		
35	The Woods	GB / US / IE	2015	3	386 578	1 064	385 514		
36	Clouds of Sils Maria	FR / DE / CH	2014	9	331 208	210 596	73 795	37 767	9 050
37	Samba	FR	2014	8	320 511	58 350	170 088	52 390	39 683
38	Mune, le gardien de la lune	FR	2014	1	318 326				318 326
39	Macbeth	GB / FR	2015	8	307 777	101 667	72 809	39 714	93 587
40	Testament of Youth	GB	2014	5	303 114	216 137		79 415	7 562
41	She's Funny That Way	DE / US	2014	10	298 116	13 285	267 450	17 381	
42	Deux jours, une nuit	BE / FR / IT	2014	9	291 473	141 474	108 399	6 909	34 691
43	The Two Faces of January	GB / FR / US	2014	3	286 405		19 926		266 479
44	Leviafan	RU	2014	11	281 122	136 417	78 304	57 696	8 705
45	A Little Chaos	GB	2014	5	267 608	66 213	92 100	109 295	
46	Dark Places	GB / FR / US	2015	9	255 064	24 744	163 973		66 347
47	Ich seh, Ich seh	AT	2014	3	249 964	139 835	110 129		
48	A Royal Night Out	GB	2015	4	223 182	27 063		196 119	
49	Grace of Monaco	FR / US / BE / IT / CH	2014	3	220 932		220 932		
50	Timbuktu	FR / MR	2014	5	214 036	124 688	89 348		

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 29 contd.

N°	Film	Countries of origin	Prod. Year	# of release markets	Adm 2014 outside Europe	Adm 2014 – US/CA	Adm 2014- Latin America	Adm 2014– AU/NZ	Adm 2014– CN/KR
51	What We Did on Our Holiday	GB	2014	4	207 115	29 711		164 307	13 097
52	Dior and I	FR	2014	5	201 103	121 996	10 108	59 773	9 226
53	A zori zdes tikhie...	RU	2015	1	199 590				199 590
54	Astérix: Le domaine des dieux	FR / BE	2014	2	199 384	184 520			14 864
55	Maya the Bee Movie	DE / AU	2014	5	196 530		196 530		
56	Youth	IT / FR / GB / CH	2015	3	187 693	153 900		33 793	
57	Third Person	GB / US / DE / BE / FR	2013	5	163 968		153 490		10 478
58	'71	GB	2014	3	163 405	150 753		12 652	
59	Ida	PL / DK	2013	11	163 212	7 009	140 729	1 100	14 374
60	Kidnapping Mr. Heineken	BE / NL / US / GB	2015	7	159 918	191	144 427	11 883	3 417
61	Im Labyrinth des Schweigens	DE	2014	6	146 365	90 050	56 315		
62	Pinocchio	DE	2013	2	142 235		142 235		
63	Mary's Land	ES	2013	3	131 999		131 999		
64	Suite Française	FR / GB / CA / BE	2014	5	130 440	20 249	89 619		20 572
65	Snezhnaya koroleva	RU	2012	1	118 537				118 537
66	Hundraåringen som klev ut …	SE	2013	2	111 497	111 497			
67	Noble	GB / VN	2014	4	104 817	41 201		62 615	1 001
68	[REC] 4: Apocalipsis	ES	2014	4	103 286	99	103 187		
69	The Lobster	IE / FR / GB / NL / GR	2015	2	99 221			47 029	52 192
70	Song of the Sea	IE / LU / BE / FR / DK	2014	3	95 262	95 218	44		
71	Ghoul	CZ / UA	2015	2	92 706		92 706		
72	Hector and the Search for …	DE / CA / GB / ZA	2014	4	91 988		89 772	368	1 848
73	Le Week-End	GB / FR	2013	3	89 840		89 840		
74	Magic Card	IT / US / CN	2015	1	89 248				89 248
75	Man Up	GB / FR	2015	3	85 960	423		85 537	
76	Musarañas	ES / FR	2014	2	85 486		85 486		
77	Love	FR / BE	2015	5	83 584	29 547	53 847	190	
78	Une nouvelle amie	FR	2014	6	81 556	17 408	56 311	42	7 795
79	Ocho apellidos vascos	ES	2013	5	78 192		78 192		
80	The D Train	GB / US	2015	1	78 177	78 177			
81	L'homme qu'on aimait trop	FR	2014	5	77 747	32 713	45 034		
82	Turist	SE / DK / FR / NO	2014	8	77 128	26 754	33 794	12 186	4 394
83	El desconocido	ES	2015	1	75 779		75 779		
84	Jimmy's Hall	GB / IE / FR	2014	5	75 318	66 499	8 375	444	
85	Minuscule - La vallée des fourmis perdues	FR / BE	2013	3	75 188		75 188		
86	Los últimos días	ES / FR	2013	1	74 610				74 610
87	Pride	GB / FR	2014	4	73 645		63 121	10 524	
88	X+Y	GB	2014	5	70 771	17 939		39 219	13 613
89	Il capitale umano	IT / FR	2013	7	69 267	16 424	52 004	839	
90	Les vacances du petit Nicolas	FR	2014	2	68 592		68 592		
91	Madame Bovary	DE / BE / US	2014	4	67 669	6 579		55 220	5 870
92	Roger Waters the Wall	GB	2014	6	67 118		49 687	17 431	
93	Fehér isten	HU / SE	2014	5	64 917	33 494	29 815		1 608
94	3 coeurs	FR / DE / BE	2014	8	63 505	18 857	39 044		5 604
95	Gemma Bovery	FR	2014	6	61 354	22 713	19 345	16 976	2 320
96	45 Years	GB	2015	3	60 958	16 803	44 155		
97	Arthur et la guerre des …	FR	2010	1	60 841				60 841
98	Autómata	BG / ES	2014	4	59 284		59 284		
99	Saint Laurent	FR / BE	2014	4	59 177	50 946	754		7 477
100	When the Lights Went Out	GB	2011	1	55 845		55 845		

Source: European Audiovisual Observatory / LUMIERE, comScore

APPENDIX

Data Scope – Coverage Rates

Data Scope – Coverage Rates

1. Number of films tracked in LUMIERE database by territory 2011-2015

Territory			2011	2012	2013	2014	2015
EUROPE							
1	**AT**	Austria	511	514	510	534	431
2	**BA**	Bosnia-Herzegovina	149			19	
3	**BE**	Belgium	470	484	343	504	20
4	**BG**	Bulgaria	275	280	283	305	314
5	**CH**	Switzerland	1 560	1 676	1 671	1 642	1 643
6	**CY**	Cyprus	6	5	4	153	
7	**CZ**	Czech Republic	1 117	1 124	1 228	1 076	1 160
8	**DE**	Germany	551	598	609	2 362	2 431
9	**DK**	Denmark	287	246	260	260	263
10	**EE**	Estonia	352	397	377	351	377
11	**ES**	Spain	1 237	1 234	1 463	1 473	50
12	**FI**	Finland	409	329	337	338	326
13	**FR**	France	838	790	933	936	831
14	**GB**	United Kingdom	647	739	798	2 560	596
15	**GR**	Greece	361	303	329	351	309
16	**HR**	Croatia	223	185	247	217	220
17	**HU**	Hungary	273	288	302	556	550
18	**IE**	Ireland	33	34	30	28	
19	**IS**	Iceland	13	30	7	161	191
20	**IT**	Italy	727	907	1 110	1 196	1 260
21	**LI**	Liechtenstein	13	17			
22	**LT**	Lithuania	300	43	304	267	290
23	**LU**	Luxembourg	121	110	76	104	
24	**LV**	Latvia	390	480	13	517	229
25	**ME**	Montenegro (from June 2006)			177	182	
26	**MK**	Former Yugoslav Republic of Macedonia		80		221	
27	**NL**	Netherlands	1 329	1 113	1 201	1 133	459
28	**NO**	Norway	538	483	483	496	593
29	**PL**	Poland	459	474	507	547	473
30	**PT**	Portugal	790	816	956	995	1 030
31	**RO**	Romania	133	398	411	416	408
32	**RU**	Russian Federation	342	401	497	622	656
33	**SE**	Sweden	636	536	575	537	880
34	**SI**	Slovenia	383	399	442	429	505
35	**SK**	Slovakia	257	611	566	609	597
36	**TR**	Turkey	429	491	498	564	522
OUTSIDE OF EUROPE							
1	**AR**	Argentina	304	335	366	499	525
2	**AU**	Australia	356	410	432	569	621
3	**BR**	Brazil	363	358	467	613	648
4	**CA**	Canada	488	568	601	484	532
5	**CL**	Chile	190	209	203	281	289
6	**CN**	China				422	648
7	**CO**	Colombia	208	215	241	343	385
8	**KR**	South Korea	402	492	729	591	518
9	**MX**	Mexico	326	323	376	586	594
10	**NZ**	New Zealand	316	288	311	355	383
11	**US**	United States of America	998	1 221	1 238	815	833
12	**VE**	Venezuela	164	166	166	199	269

Source: European Audiovisual Observatory / LUMIERE, comScore

2. Admissions tracked in LUMIERE database by territory 2011-2015

Territory			2011	2012	2013	2014	2015
EUROPE							
1	AT	Austria	15 813 237	16 434 386	15 214 412	14 350 653	15 922 451
2	BA	Bosnia-Herzegovina	494 772			33 782	
3	BE	Belgium	18 478 038	19 203 864	17 430 457	11 651 097	10 255 617
4	BG	Bulgaria	4 727 140	4 108 824	4 792 683	4 893 323	5 333 528
5	CH	Switzerland	14 832 295	15 461 270	13 577 832	12 785 980	14 289 488
6	CY	Cyprus	15 915	14 050	8 366	699 398	
7	CZ	Czech Republic	10 780 344	11 152 268	11 032 364	11 455 342	12 915 237
8	DE	Germany	126 755 958	131 563 808	126 059 778	120 351 597	135 035 050
9	DK	Denmark	10 836 840	14 122 151	13 888 535	12 194 185	14 199 726
10	EE	Estonia	2 476 260	2 592 537	2 528 240	2 606 577	3 088 128
11	ES	Spain	98 172 189	94 043 529	79 648 617	87 585 014	67 307 478
12	FI	Finland	7 146 914	8 393 943	7 722 936	7 312 341	8 722 707
13	FR	France	207 857 395	194 730 726	178 724 378	191 426 773	186 915 714
14	GB	United Kingdom	190 045 312	185 103 574	176 255 610	168 061 645	181 933 453
15	GR	Greece	11 025 905	9 942 744	9 289 557	9 107 058	9 806 141
16	HR	Croatia	3 367 012	3 876 497	4 023 161	3 766 199	3 933 141
17	HU	Hungary	10 343 231	10 086 836	9 635 321	11 016 406	13 017 185
18	IE	Ireland	91 431	69 610	44 149	56 005	
19	IS	Iceland	14 511	35 824	18 313	1 344 560	1 379 344
20	IT	Italy	89 472 301	92 190 190	97 793 263	92 010 500	99 259 983
21	LI	Liechtenstein	1 690	2 363			
22	LT	Lithuania	2 970 967	139 993	3 257 020	3 240 702	3 330 451
23	LU	Luxembourg	189 072	170 115	79 310	514 175	
24	LV	Latvia	2 021 268	2 258 661	26 901	2 303 718	2 287 325
25	ME	Montenegro (from June 2006)			222 804	258 894	
26	MK	Former Yugoslav Republic of Macedonia		118 511		357 324	
27	NL	Netherlands	30 429 232	28 652 781	30 629 011	30 671 280	30 134 404
28	NO	Norway	11 551 919	11 928 047	11 614 265	10 890 188	11 899 994
29	PL	Poland	38 583 426	38 421 989	36 242 716	40 386 379	44 516 524
30	PT	Portugal	15 688 835	13 798 143	12 511 978	12 085 692	14 542 013
31	RO	Romania	5 307 028	8 316 859	9 020 701	10 131 494	11 115 581
32	RU	Russian Federation	172 672 396	171 671 503	192 409 536	191 529 707	191 230 521
33	SE	Sweden	16 426 846	18 346 705	16 582 505	16 246 619	17 017 949
34	SI	Slovenia	2 869 398	2 636 702	2 159 369	1 845 961	1 984 048
35	SK	Slovakia	3 559 129	3 432 069	3 720 169	4 119 361	4 605 808
36	TR	Turkey	42 292 597	44 218 040	50 399 726	61 353 895	60 355 895
OUTSIDE OF EUROPE							
1	AR	Argentina	40 946 835	45 165 968	46 180 711	43 797 344	50 051 809
2	AU	Australia	79 590 628	81 039 376	74 291 541	77 117 515	87 971 495
3	BR	Brazil	134 562 983	137 939 391	141 903 602	154 745 338	168 327 209
4	CA	Canada	121 371 465	128 539 934	117 059 141	116 206 322	118 399 764
5	CL	Chile	16 498 330	19 372 659	20 338 487	21 940 101	25 898 969
6	CN	China				794 733 977	1 214 104 427
7	CO	Colombia	35 160 052	38 672 496	41 014 822	45 986 154	58 667 015
8	KR	South Korea	152 069 324	187 284 891	204 387 042	210 927 515	214 338 372
9	MX	Mexico	197 134 522	218 704 629	245 142 465	256 255 435	294 365 188
10	NZ	New Zealand	13 109 453	12 235 954	10 528 886	10 939 122	13 893 314
11	US	United States of America	1 077 096 334	1 149 189 023	1 115 270 398	1 154 434 603	1 197 322 384
12	VE	Venezuela	28 195 146	27 119 596	27 261 651	29 592 206	28 918 555

Source: European Audiovisual Observatory / LUMIERE, comScore

3. Estimated LUMIERE coverage rate of individual territories 2011-2015 (in %)

Territory			2011	2012	2013	2014	2015
EUROPE							
1	**AT**	Austria	100	100	100	100	99
2	**BA**	Bosnia-Herzegovina	100			3	
3	**BE**	Belgium	81	87	83	54	46
4	**BG**	Bulgaria	100	100	99	99	100
5	**CH**	Switzerland	99	99	99	98	99
6	**CY**	Cyprus	1	1	1	100	
7	**CZ**	Czech Republic	99	99	99	99	99
8	**DE**	Germany	97	97	97	98	97
9	**DK**	Denmark	87	100	100	99	100
10	**EE**	Estonia	100	100	98	100	99
11	**ES**	Spain	99	100	100	100	71
12	**FI**	Finland	100	100	99	100	99
13	**FR**	France	95	95	92	91	90
14	**GB**	United Kingdom	100	100	100	100	100
15	**GR**	Greece	100	98	100	100	100
16	**HR**	Croatia	94	95	100	100	100
17	**HU**	Hungary	100	100	94	100	100
18	**IE**	Ireland					
19	**IS**	Iceland		2	1	99	97
20	**IT**	Italy	79	92	91	92	92
21	**LI**	Liechtenstein					
22	**LT**	Lithuania	97	4	100	100	99
23	**LU**	Luxembourg	14	13	6	45	
24	**LV**	Latvia	98	98	1	99	97
25	**ME**	Montenegro (from June 2006)				100	
26	**MK**	Former Yugoslav Republic of Macedonia		58		99	
27	**NL**	Netherlands	99	93	99	99	91
28	**NO**	Norway	99	98	98	98	98
29	**PL**	Poland	99	99	99	99	99
30	**PT**	Portugal	99	99	99	99	100
31	**RO**	Romania	73	99	99	99	100
32	**RU**	Russian Federation	100	100	100	100	100
33	**SE**	Sweden	99	100	99	99	99
34	**SI**	Slovenia	98	96	92	95	96
35	**SK**	Slovakia	98	99	99	99	100
36	**TR**	Turkey	99	100	99	99	99
OUTSIDE OF EUROPE							
1	**AR**	Argentina	96	100	100	96	
2	**AU**	Australia	93	94	90	98	100
3	**BR**	Brazil	93	92	94	99	100
4	**CA**	Canada	100	99	91	95	97
5	**CL**	Chile	100	100	100	100	100
6	**CN**	China				95	100
7	**CO**	Colombia	92	94	94	98	100
8	**KR**	South Korea	95	96	95	98	99
9	**MX**	Mexico	96	95	98	100	100
10	**NZ**	New Zealand	92	83	71	73	92
11	**US**	United States of America	90	93	91	100	100
12	**VE**	Venezuela	93	92	90	98	96

Source: European Audiovisual Observatory / LUMIERE, comScore

4. EUR INC films considered as European / US films in this report

As mentioned in the methodological remarks in chapter 2, European films financed with incoming US investment („EUR inc films") are by default not counted as European but rather US films in the context of this report. The following EUR inc films however represent an exception to this rule as they feature as European films in the European Commission's Executive Agency EAC's film database (https://eacea.ec.europa.eu/mediaPgm/tabsMenu.do) and / or in Europa Cinema's film database (http://www.europa-cinemas.org/en/Resources/Film-Database).

Please note that Observatory's „INC" classification is not based on the same criteria as the British Film Institute's classification of „inward investment" films in the UK. The Observatory's „INC" classification is more restrictive and counts less films as „GB" or „GB inc" films than the BFI counts „UK films".

EUR INC films considered as European films in this report - 2015

N°	Film	COO (FINAL)	Prod Year	Director	ADM Outside Europe - 2015
1	The Theory of Everything	GB INC / US	2014	James Marsh	3 724 701
2	The Woman in Black 2: Angel of Death	GB INC / US	2014	Tom Harper	5 519 422
3	Absolutely Anything	GB INC / US	2015	Terry Jones	4 789
4	Rush	GB INC / US / DE	2013	Ron Howard	657 107
5	The Quiet Ones	GB INC / US	2014	John Pogue	4 421
6	Under the Skin	GB INC / US / CH	2013	Jonathan Glazer	398

Source: European Audiovisual Observatory / LUMIERE, comScore

For reference purposes, the following films which are classified as GB inc films in LUMIERE were considered as US film in the context of this analysis:

EUR INC films considered as US films in this report - 2015

N°	Film	COO (Original)	Prod Year	Director	ADM Outside Europe - 2015
1	Spectre	GB INC / US	2015	Sam Mendes	52 502 031
2	Kingsman: The Secret Service	GB INC / US	2014	Matthew Vaughn	39 783 651
6	The Second Best Exotic Marigold Hotel	GB INC / US	2015	John Madden	5 621 291
7	Woman in Gold	GB INC / US	2015	Simon Curtis	5 133 371
8	Ex Machina	GB INC / US	2015	Alex Garland	3 154 541
9	Legend	GB INC / US / FR	2015	Brian Helgeland	589 695
10	Far from the Madding Crowd	GB INC / US	2015	Thomas Vinterberg	1 775 670
11	Mr. Holmes	GB INC / US	2015	Bill Condon	2 312 244
12	Black Sea	GB INC / US / RU	2014	Kevin Macdonald	146 360
13	Before I Go to Sleep	GB INC / US / FR / SE	2014	Rowan Joffe	236 732
14	Skyfall	GB INC / US	2012	Sam Mendes	30
15	Valiant	GB INC / US	2005	Gary Chapman	87

Source: European Audiovisual Observatory / LUMIERE, comScore

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

The European Audiovisual Observatory

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 frame-work of the Council of Europe and works alongside a number of partner and professional organizations from within the industry and with a network of correspondents. In addition to contribu-tions 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.

76 Allée de la Robertsau – 67000 Strasbourg, France
Tel.: +33(0)3 90 21 60 00, Fax: +33(0)3 90 21 60 19
E-mail: info.obs@coe.int, Website: http://www.obs.coe.int

The Circulation of European Films Outside Europe

Key Figures 2015

This report provides a high level analysis of the theatrical mar-kets for European fi lms outside Europe based on admissions data for 12 non-European markets including the North American market, fi ve Latin American markets, China and South Korea in Asia as well as Australia and New Zealand in Oceania. The analysis focuses on 2015 data but is complemented by fi ve-year data series for the period 2011 to 2015 for all major indicators.