

European Audiovisual Observatory

Film market trends 2024

Nicolas Edmery
September 2025

Poland's Cinema arthouse conference



Observatoire européen de l'audiovisuel
European Audiovisual Observatory
Europäische Audiovisuelle Informationsstelle

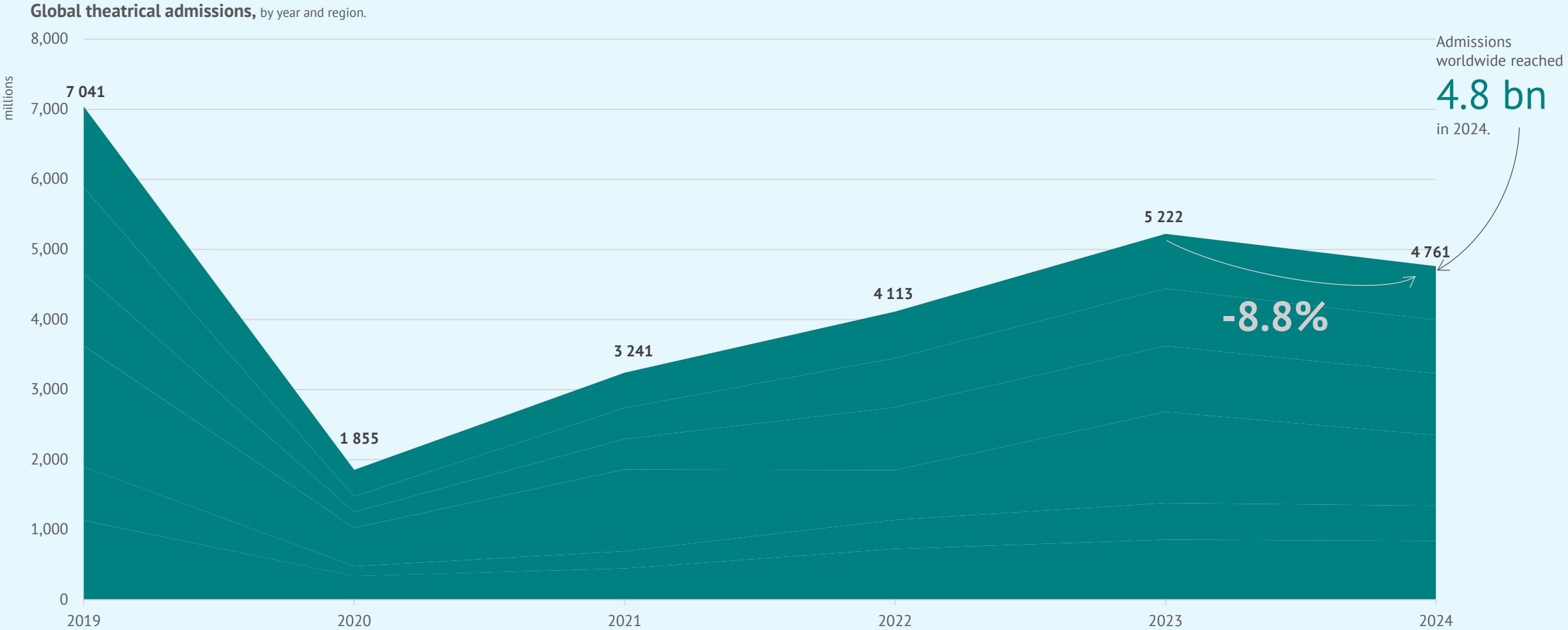




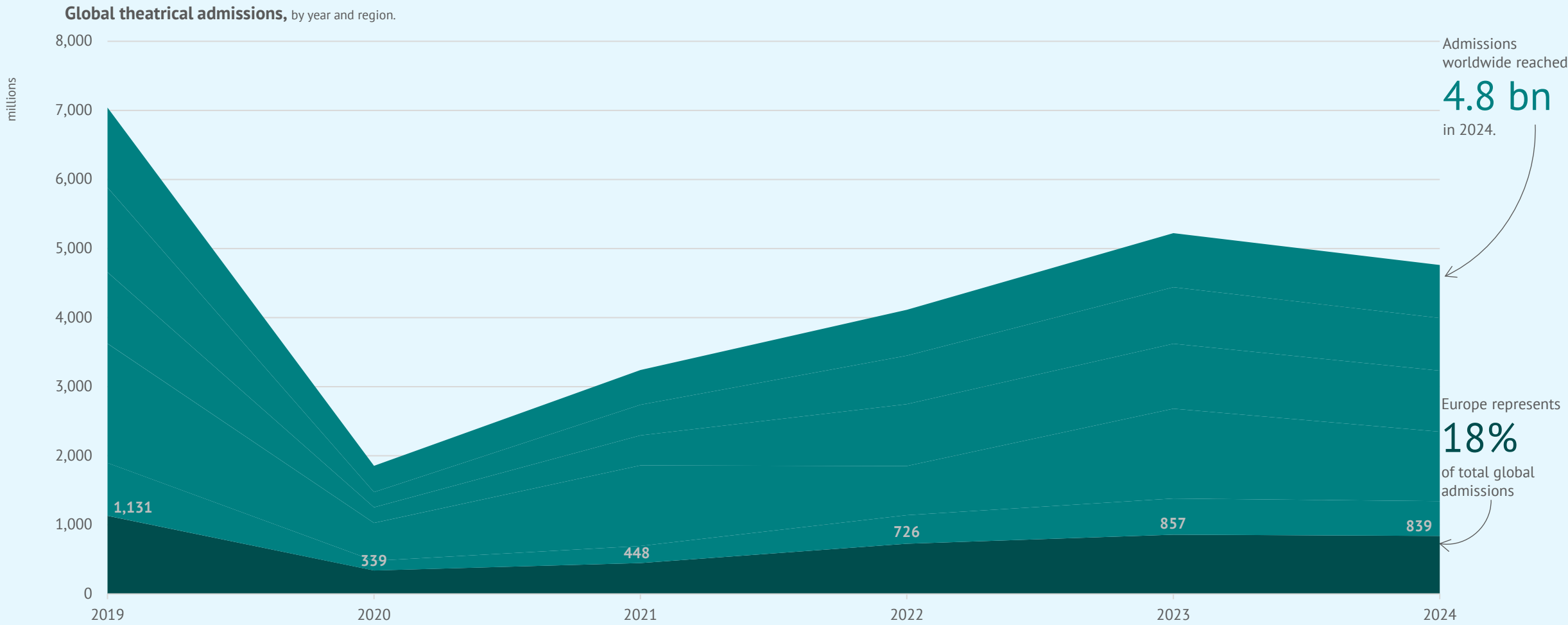
01

Admissions

Global cinema admissions decreased 8.8% to 4.8 bn in 2024. Box office revenues reached EUR 28 bn.

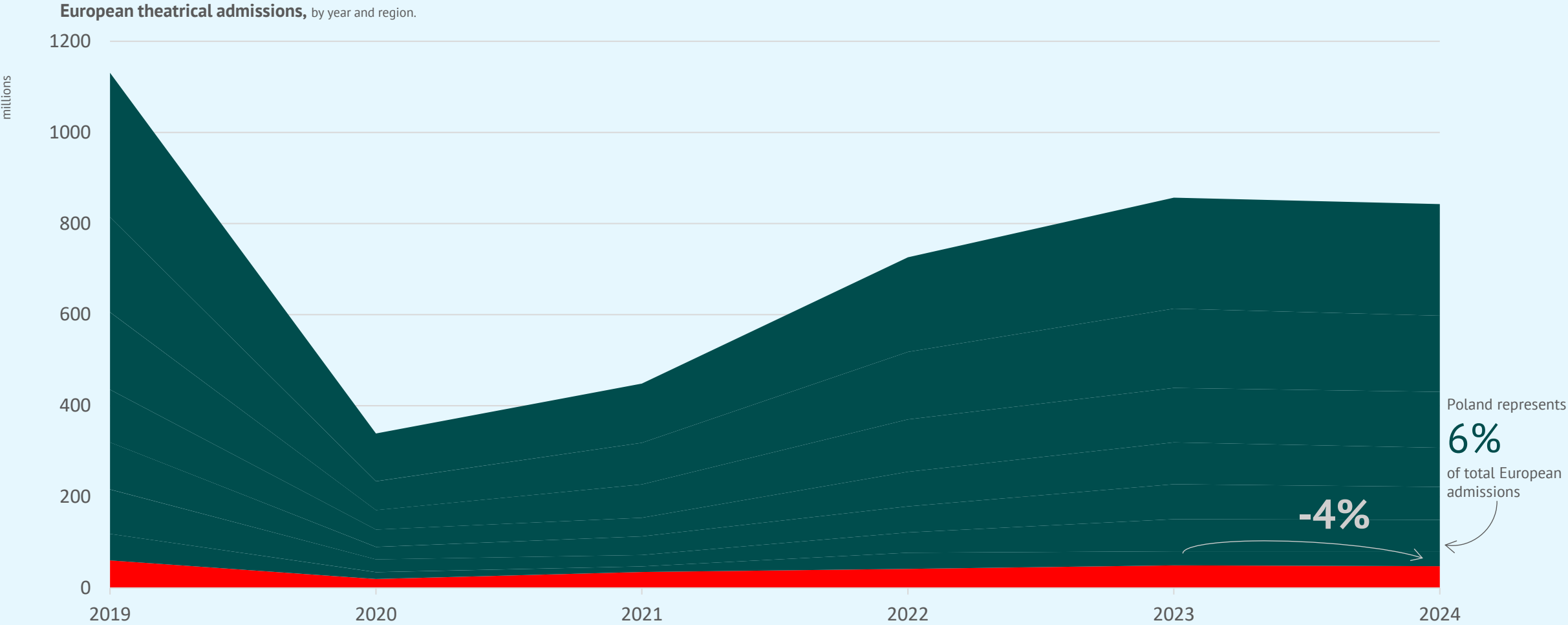


Helped by local productions, cinemas in Europe performed relatively better, reaching 839 m admissions, down only -2,1% compared to 2023.



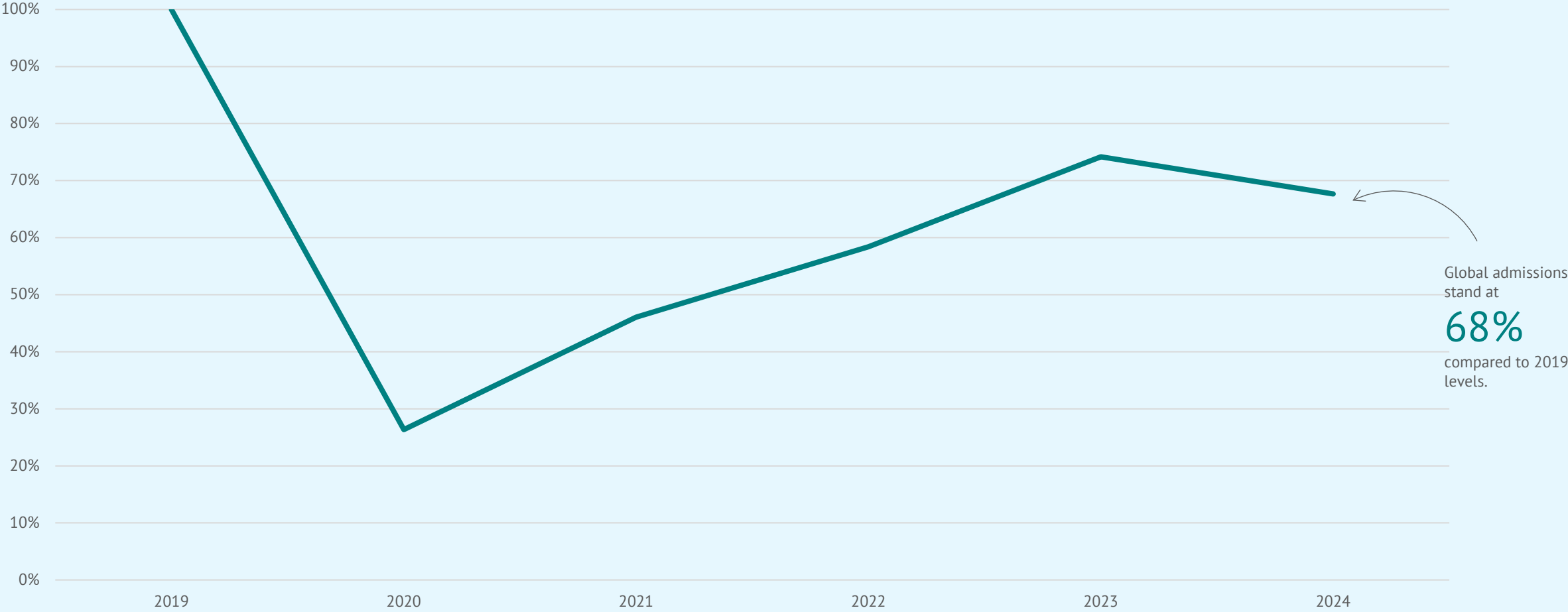
Source: European Audiovisual Observatory.

Poland's theatre admissions saw a greater decrease than the entire European market.



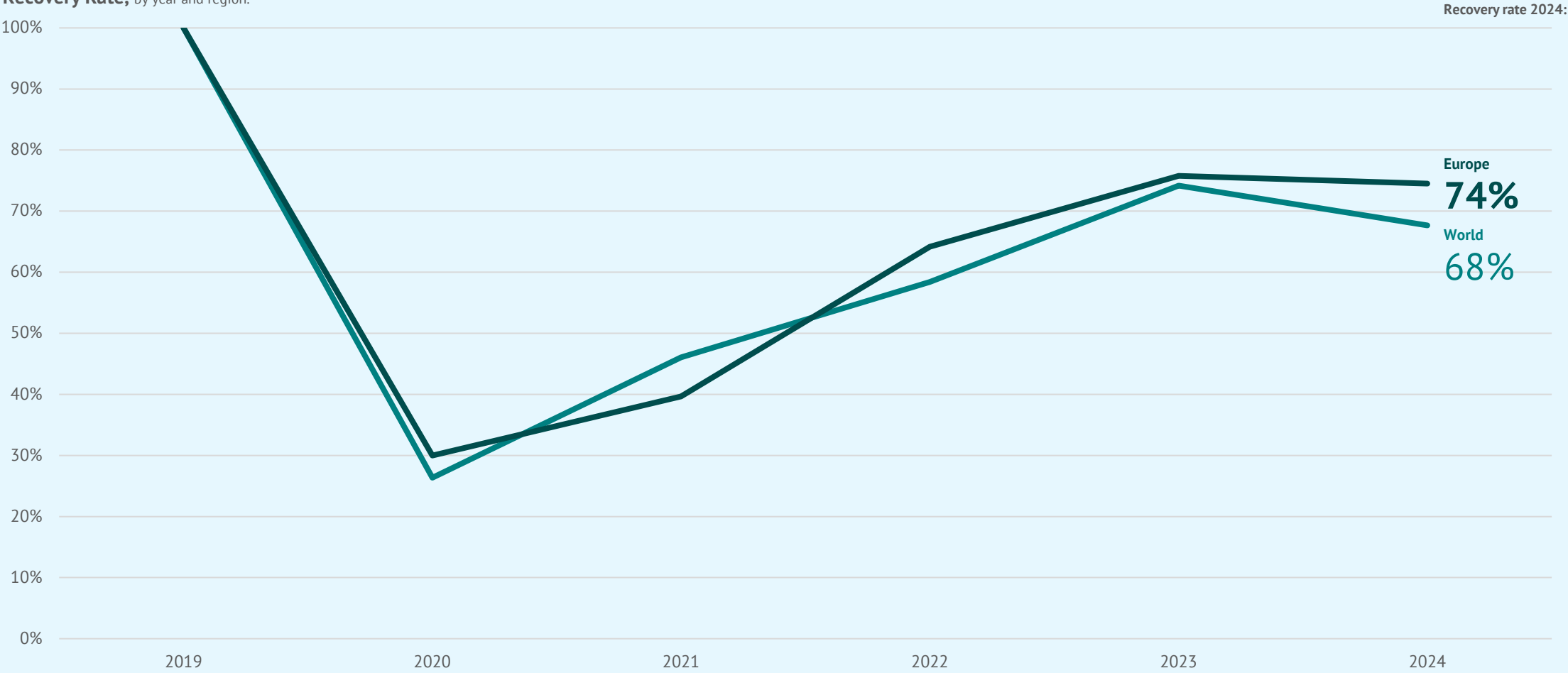
Global admissions in 2024 represented a 32% shortfall compared to 2019 figures.

Recovery Rate, by year and region.

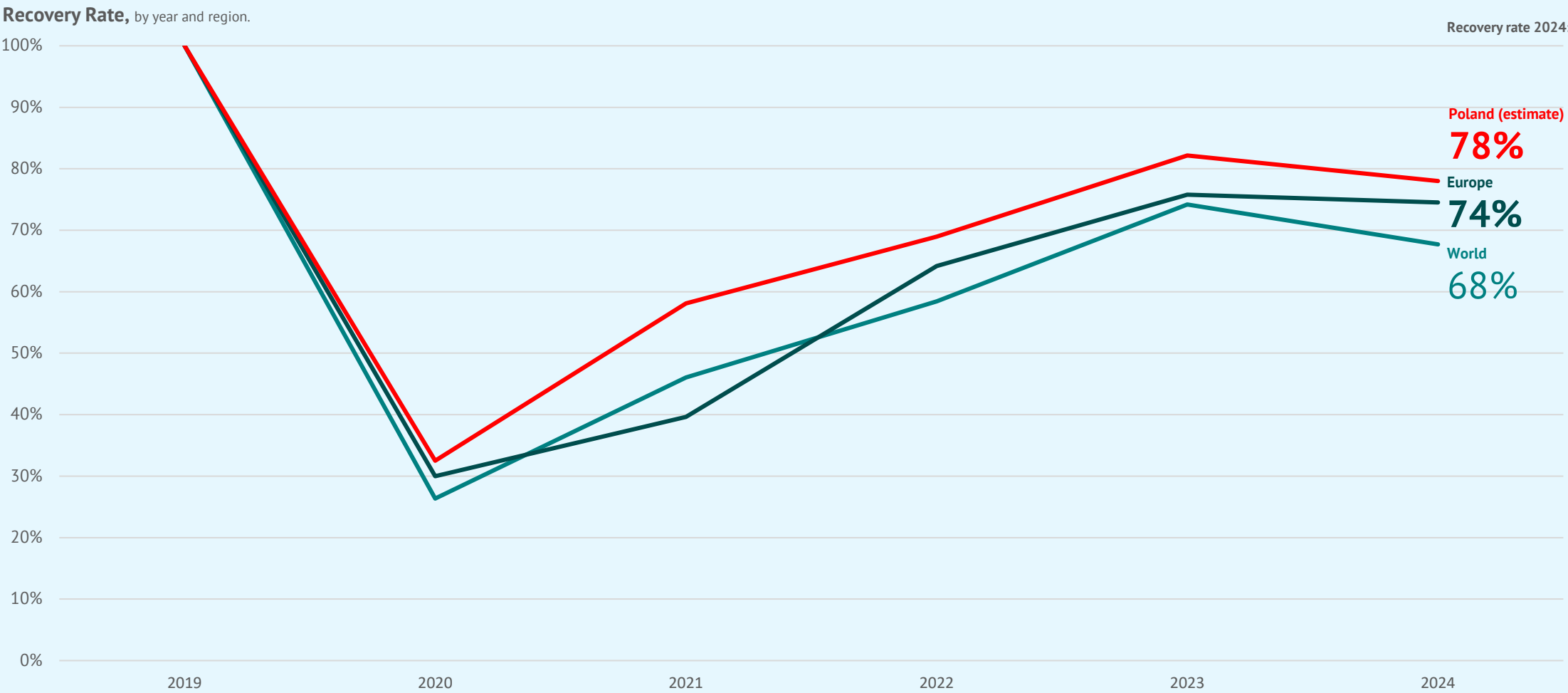


Europe is performing generally better, currently at a 74% recovery rate.

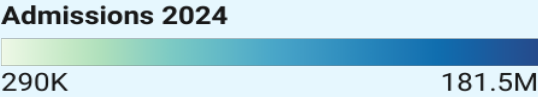
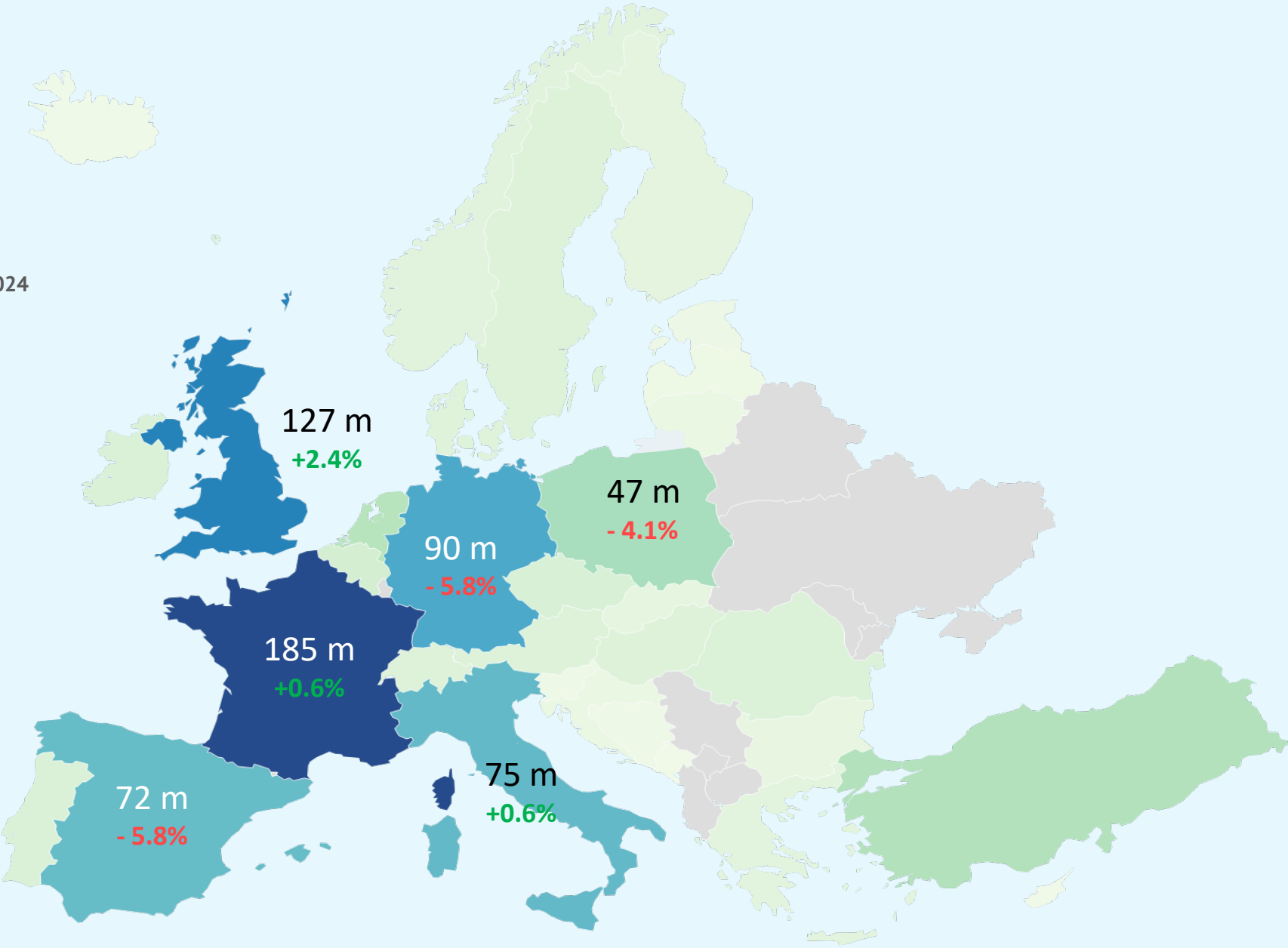
Recovery Rate, by year and region.



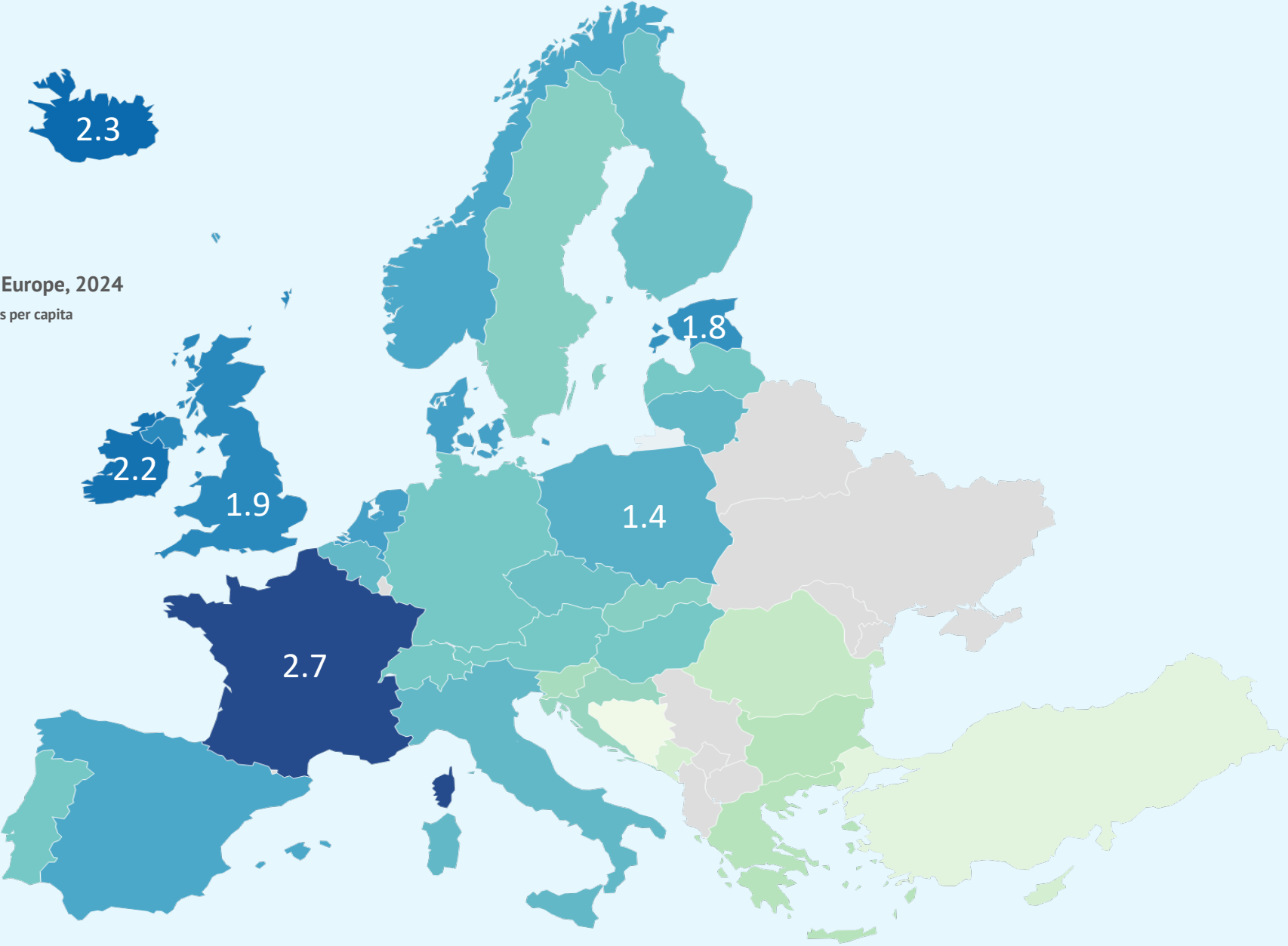
Despite a decline in 2024, Poland has demonstrated a stronger recovery from the pandemic than the European average.



Admissions in Europe, 2024



Admissions per capita in Europe, 2024
European average = 1.2 admissions per capita

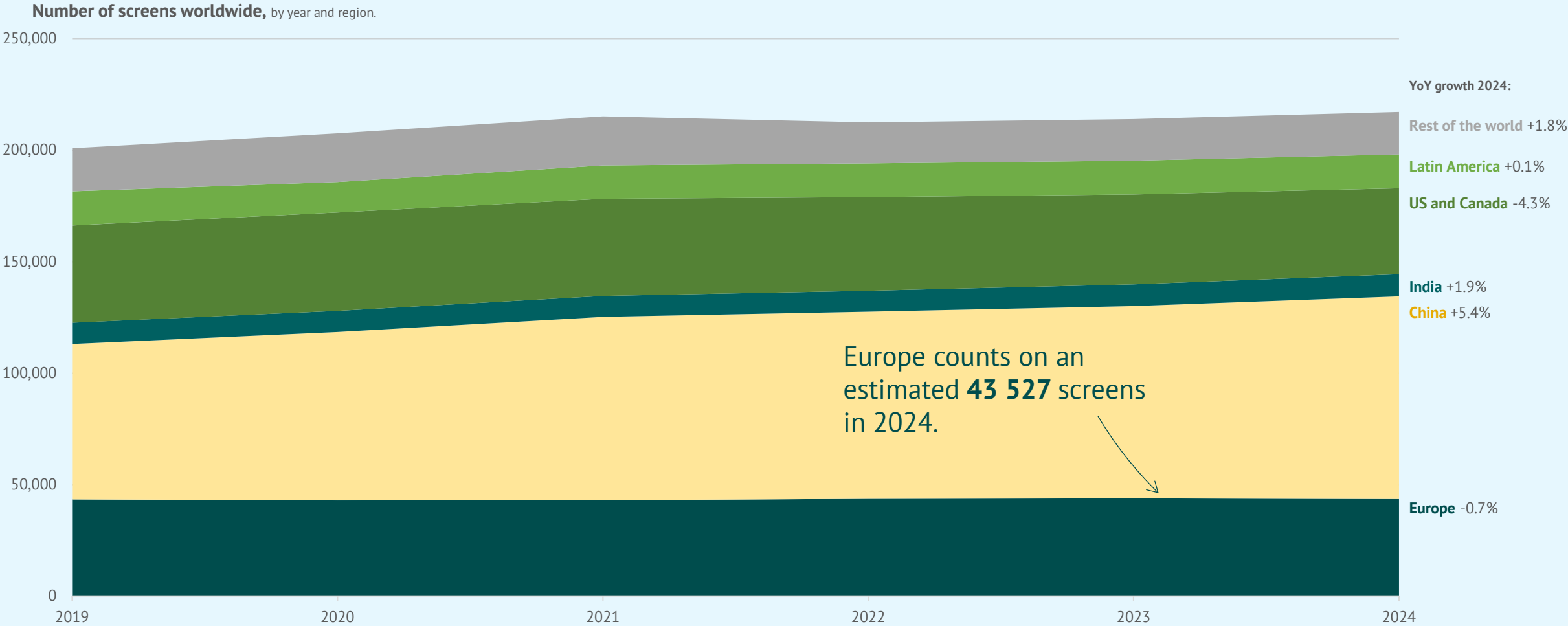




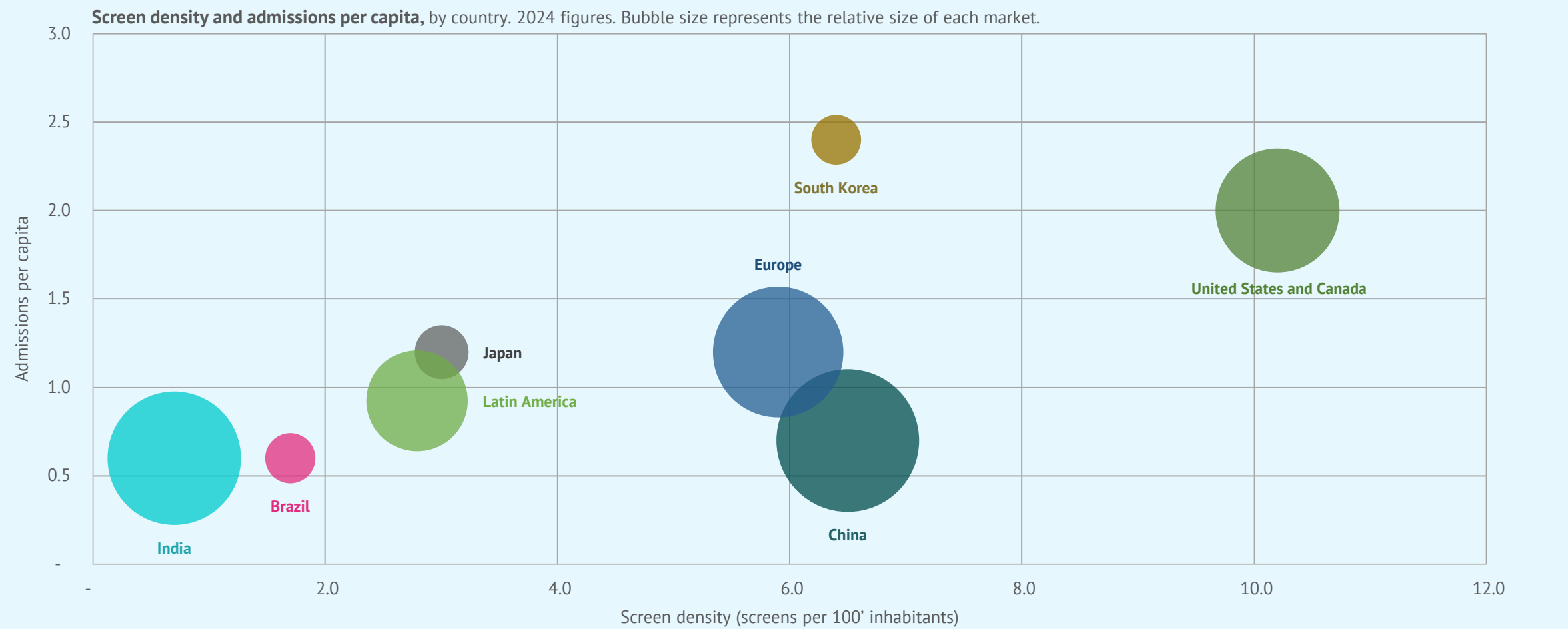
02

Theatrical infrastructure

Global screen count is on the rise, despite notable disparities between individual markets.

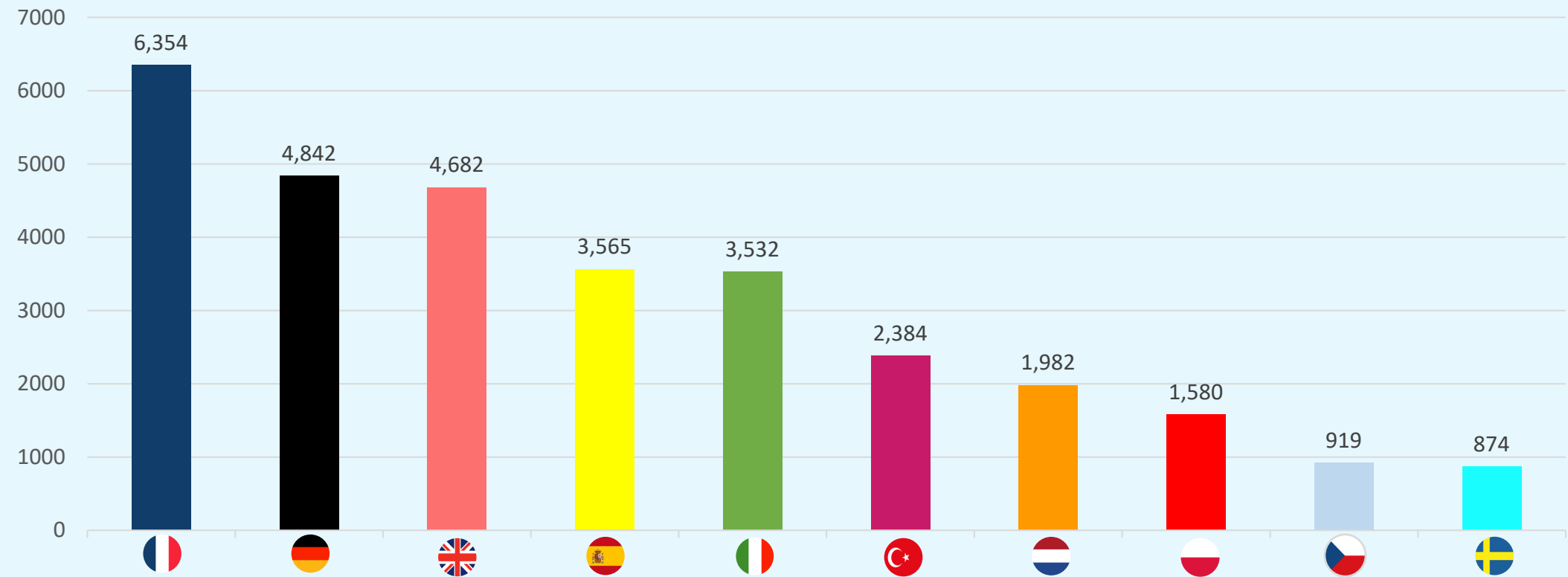


India and Latin America maintain relatively low screen density compared to other leading global markets.



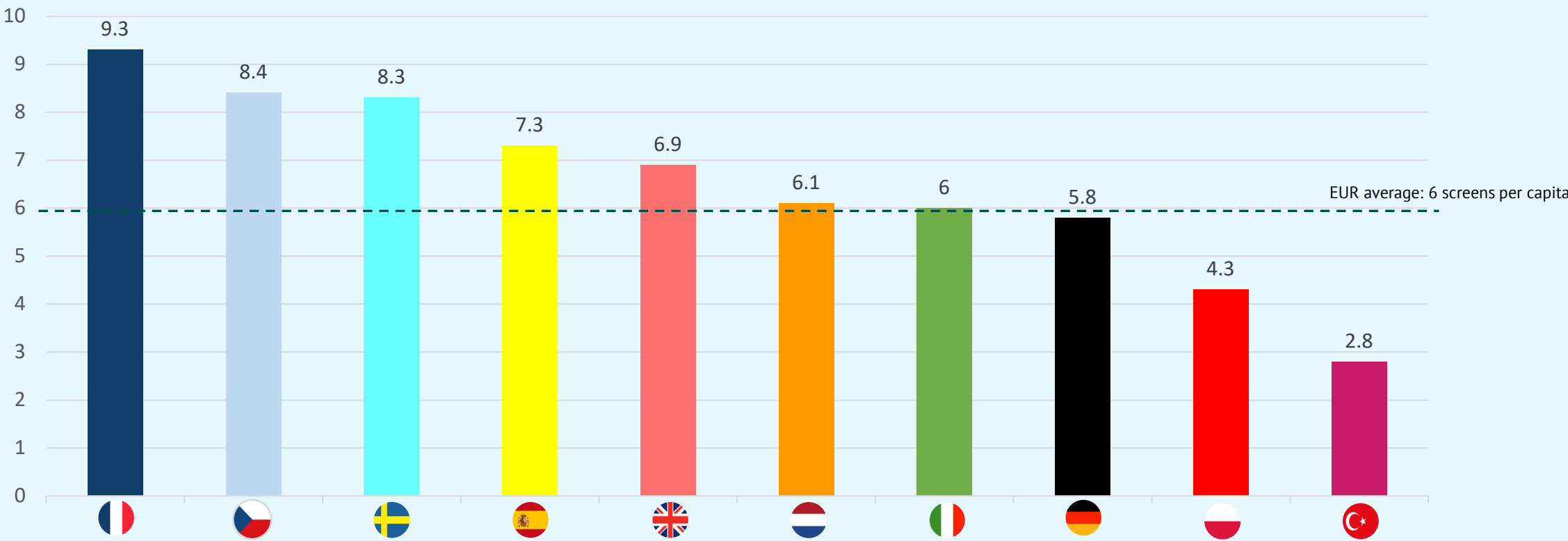
Around three quarters of all screens in Europe are located in just ten countries.

Number of screens in Europe, by country in 2024.



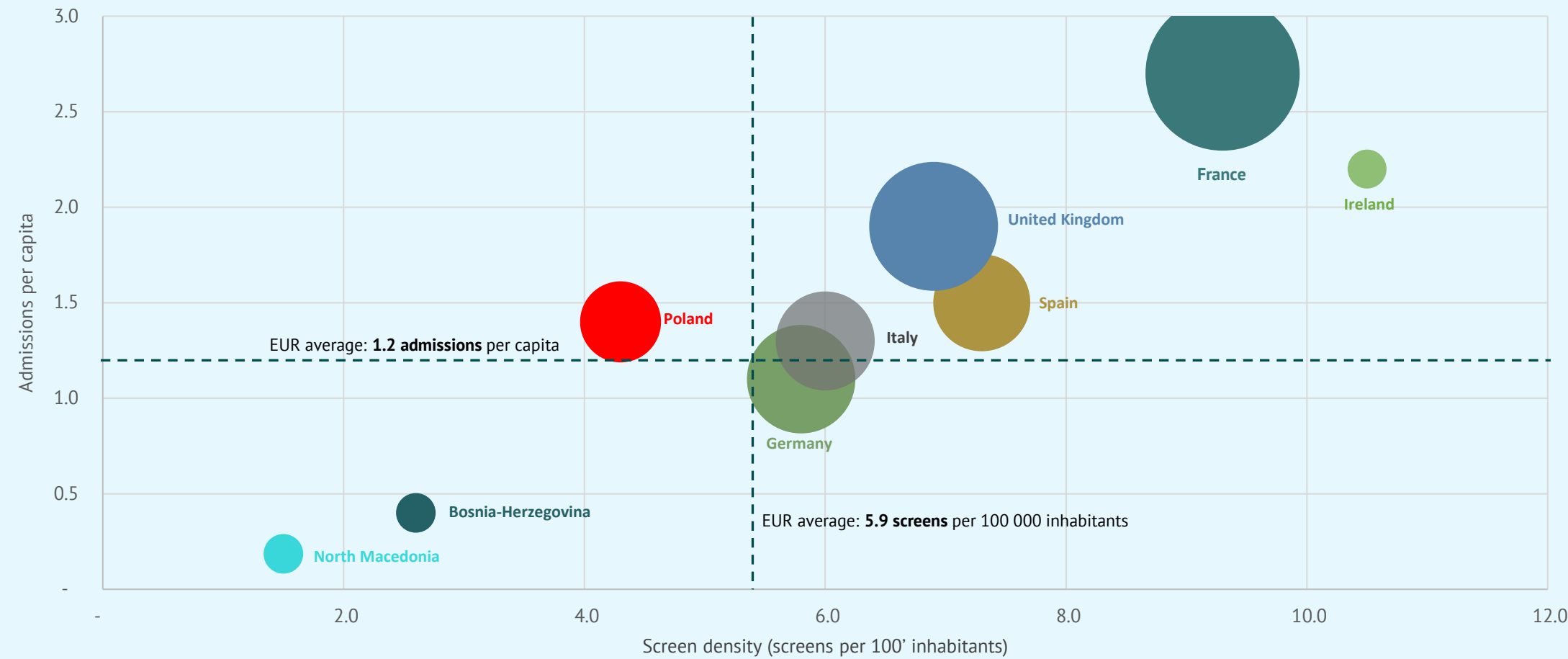
Despite having fewer screens than Poland, the Czech population has access to twice as many screens as the Polish population.

Number of screens per '100 inhabitants in Europe, by country in 2024.

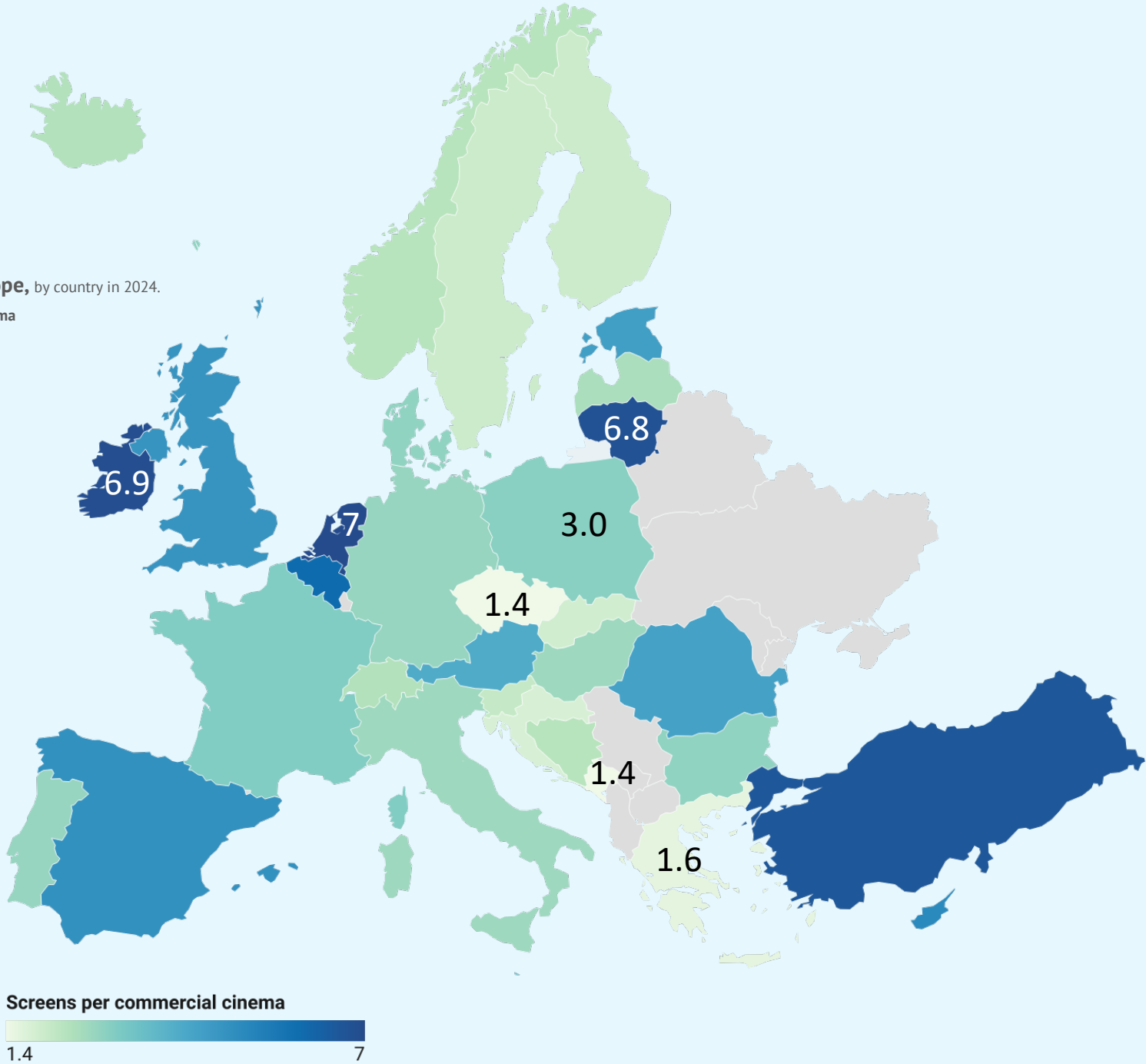


Screen density and per capita admissions appear to be closely linked across Europe, with France and Ireland leading in both areas.

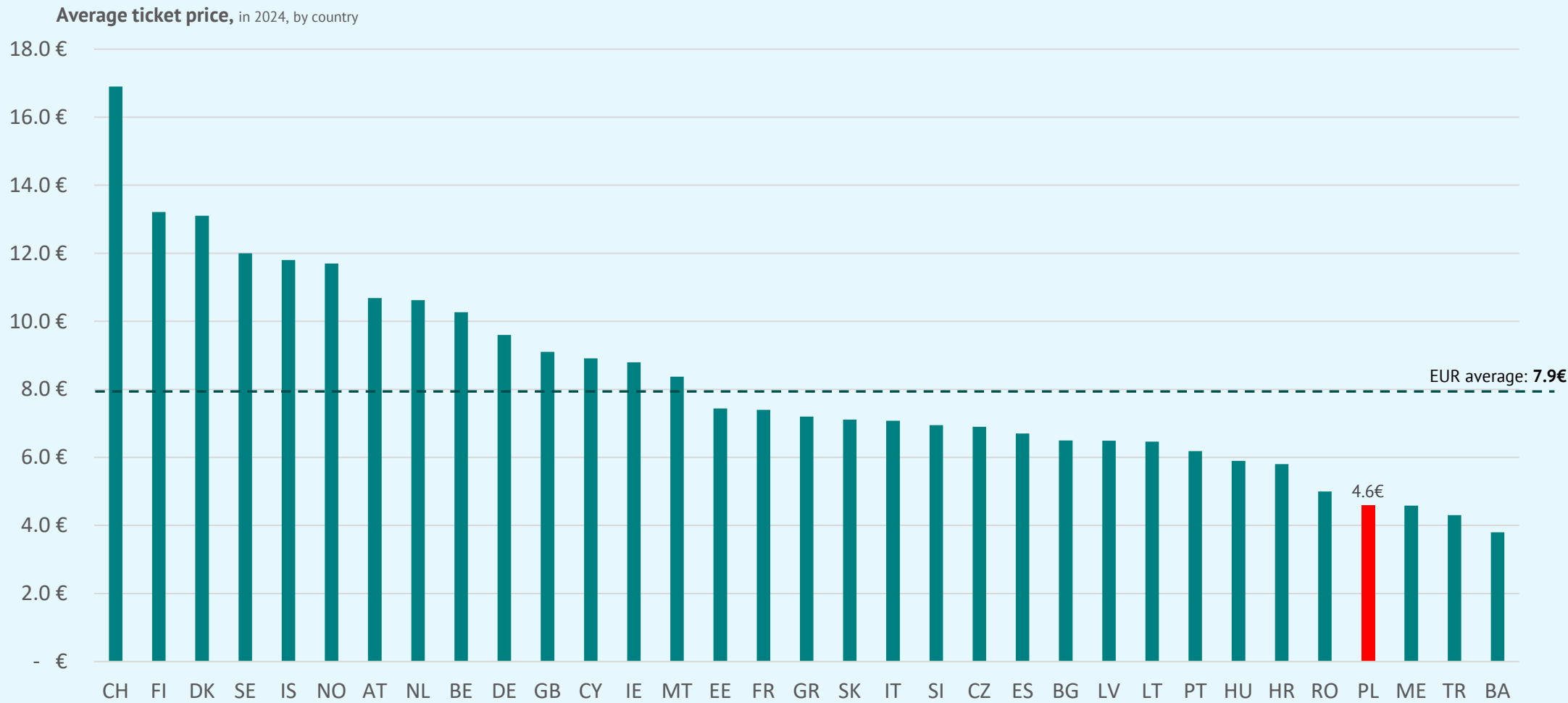
Screen density and admissions per capita, by country. 2024 figures. Bubble size represents the relative size of each market.



Number of screens per cinema in Europe, by country in 2024.
European average = 3.2 screens per commercial cinema

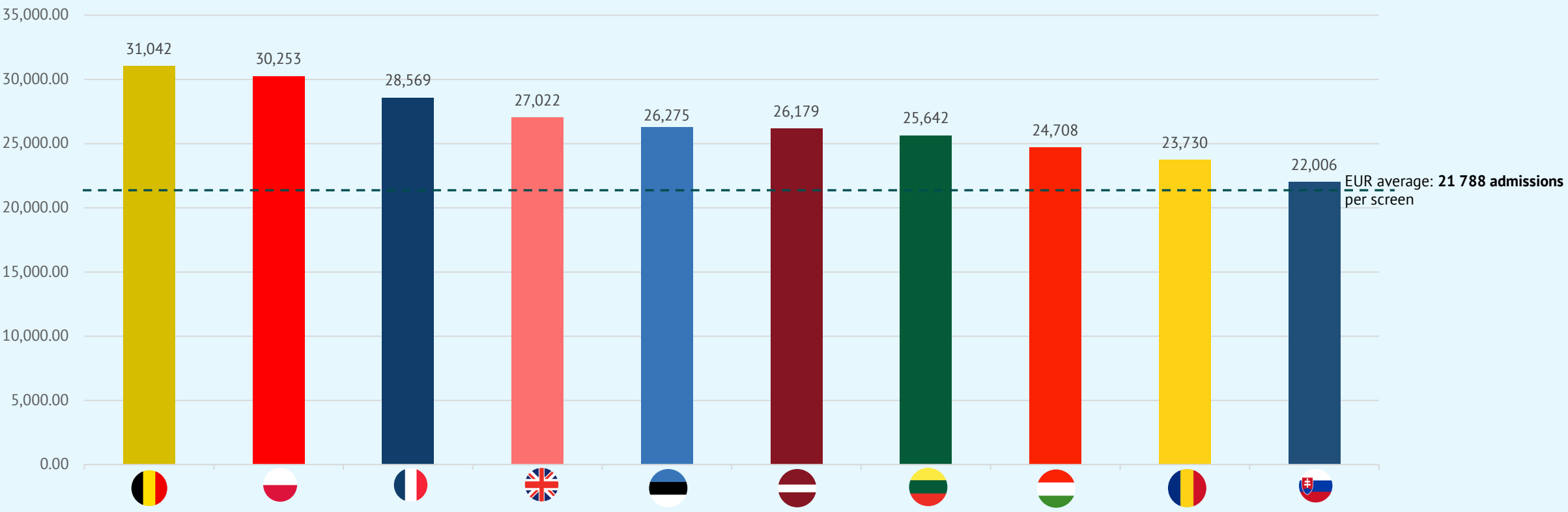


Cinema tickets in Poland are, on average, among the most affordable in Europe.



Poland, despite a lower number of screens per capita than other European countries, registered the second highest number of admissions per screen in Europe

Number of admissions per screen in Europe, by country in 2024

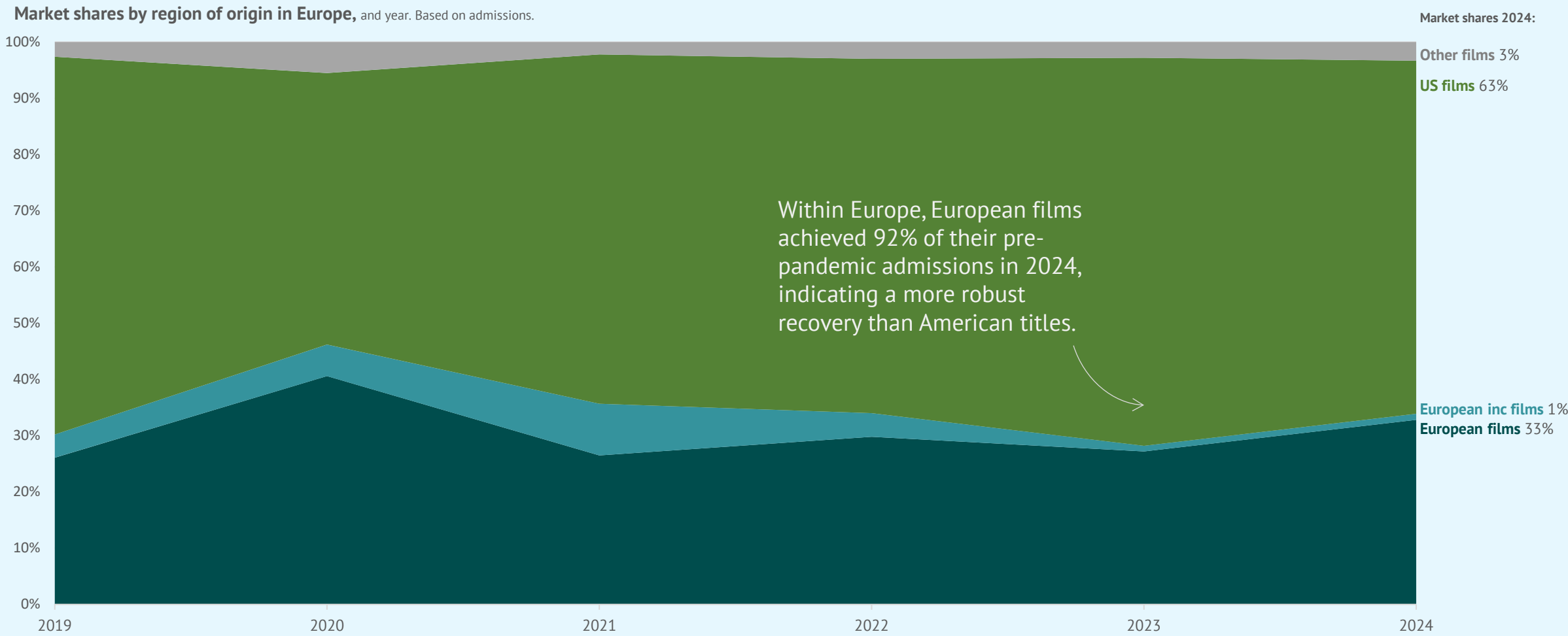




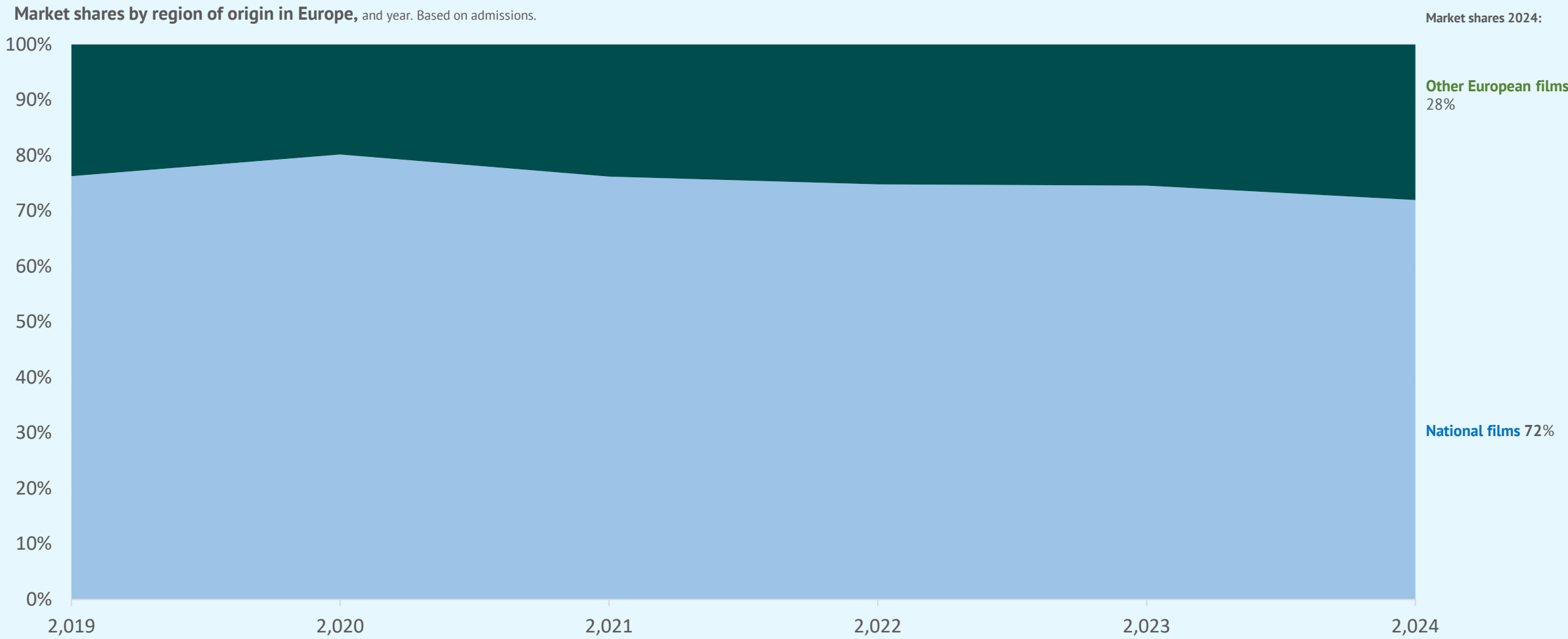
03

Market shares and top films

European films in Europe accounted for 33% of all admissions in 2024, the highest share in 4 years (10, excluding the atypical 2020 theatrical year).























Non-national European films in Europe accounted for 28% of all European admissions in 2024, the highest share in 6 years






















While American films continued to dominate, two French titles managed to enter the year-end top 20 rankings.

Top 20 films in Europe, in 2024. Ranked by total admissions.

	Title	First country of origin, director	Total admissions
1	Inside Out 2	 Kelsey Mann	50.8 m.
2	Despicable Me 4	 Chris Renaud, Patrick Delage	31.7 m.
3	Deadpool & Wolverine	 Shawn Levy	29.5 m.
4	Moana 2	 David G. Derrick Jr.	28.3 m.
5	Dune: Part Two	 Denis Villeneuve	23.5 m.
6	Gladiator II	 Ridley Scott	17.1 m.
7	Kung Fu Panda 4	 Mike Mitchell, Stephanie Stine	16.1 m.
8	Wicked	 Jon Chu	12.5 m.
9	Mufasa: The Lion King	 Barry Jenkins	12.3 m.
10	It Ends with Us	 Justin Baldoni	11.7 m.
11	Un p'tit truc en plus	 Artus	11.7 m.
12	Le Comte de Monte-Cristo	 A. de La Patellière, M. Delaporte	10.6 m.
13	Venom: the Last Dance	 Kelly Marcel	10.2 m.
14	Beetlejuice Beetlejuice	 Tim Burton	10.1 m.
15	The Wild Robot	 Chris Sanders	9.8 m.
16	Wonka	 Paul King	9.5 m.
17	Migration	 Benjamin Renner, Guylo Homsy	9.4 m.
18	Kingdom of the Planet of the Apes	 Wes Ball	8.6 m.
19	Anyone But You	 Will Gluck	8.4 m.
20	The Garfield Movie	 Mark Dindal	8.1 m.



French local breakout hits and British productions together represented 9 out of the top 10 European films in Europe in 2024.

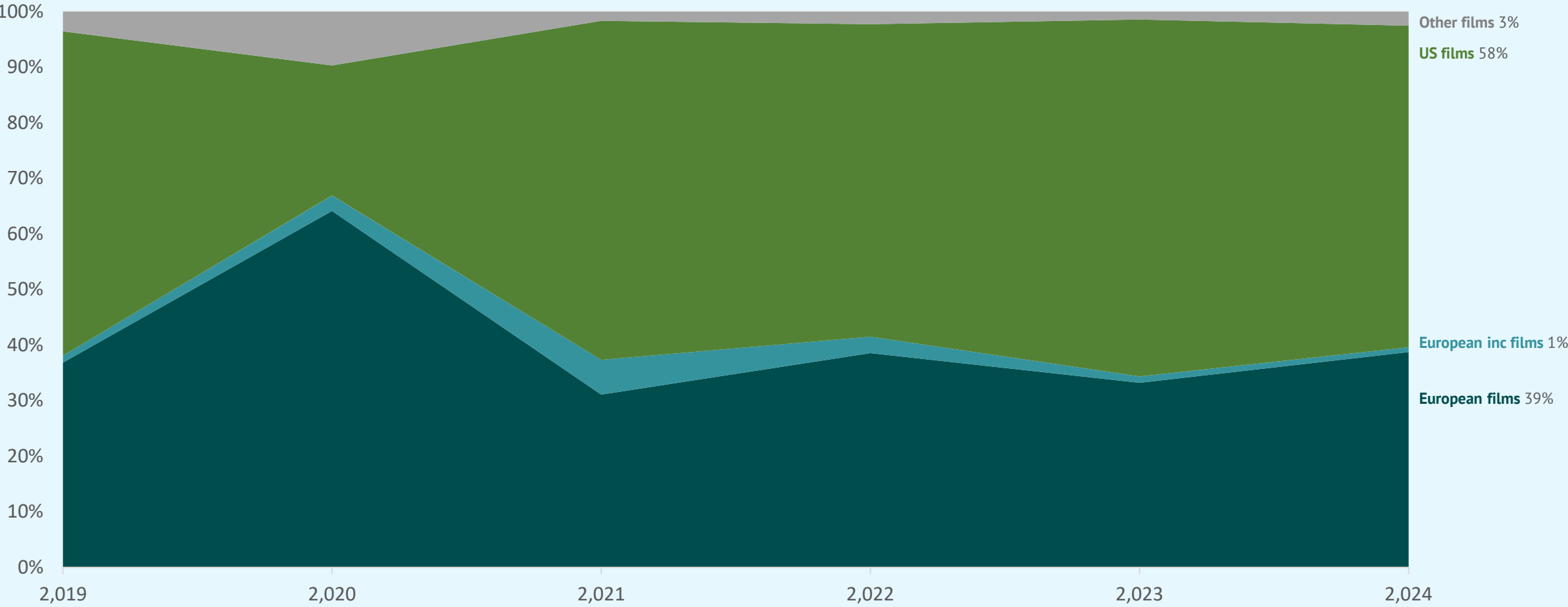
Top 20 European films in Europe, in 2024. Ranked by total admissions.			
	Title	First country of origin, director	Total admissions
1	Un p'tit truc en plus	 Artus	11.7 m.
2	Le Comte de Monte-Cristo	 A. de La Patellière, M. Delaporte	10.6 m.
3	Poor Things	 Yorgos Lanthimos	6.5 m.
4	Paddington in Peru	 Dougal Wilson	5.2 m.
5	L'amour ouf	 Gilles Lellouche	5.1 m.
6	Back to Black	 Sam Taylor-Johnson	4.9 m.
7	One Life	 James Hawes	4.5 m.
8	The Zone of Interest	 Jonathan Glazer	4.2 m.
9	Conclave	 Edward Berger	3.4 m.
10	Die Schule der magischen Tiere 3	 Sven Unterwaldt Jr.	3.3 m.
11	The Substance	 Coralie Fargeat	3.3 m.
12	Chantal im Märchenland	 Bora Dagtekin	3.2 m.
13	Le dernier jaguar	 Gilles de Maistre	3.2 m.
14	Akademia pana Kleksa	 Maciej Kawulski	2.9 m.
15	Cocorico	 Julien Hervé	2.8 m.
16	Rafadan Tayfa 4: Hayrimatör	 İsmail Fidan	2.6 m.
17	Lee	 Ellen Kuras	2.5 m.
18	C'è ancora domani	 Paola Cortellesi	2.3 m.
19	Lohusa	 Kivanc Baruonu	2.3 m.
20	Wicked Little Letters	Thea Sharrock	2.3 m.

Local break-out hits that achieved more than 80% of admissions in their country of origin.

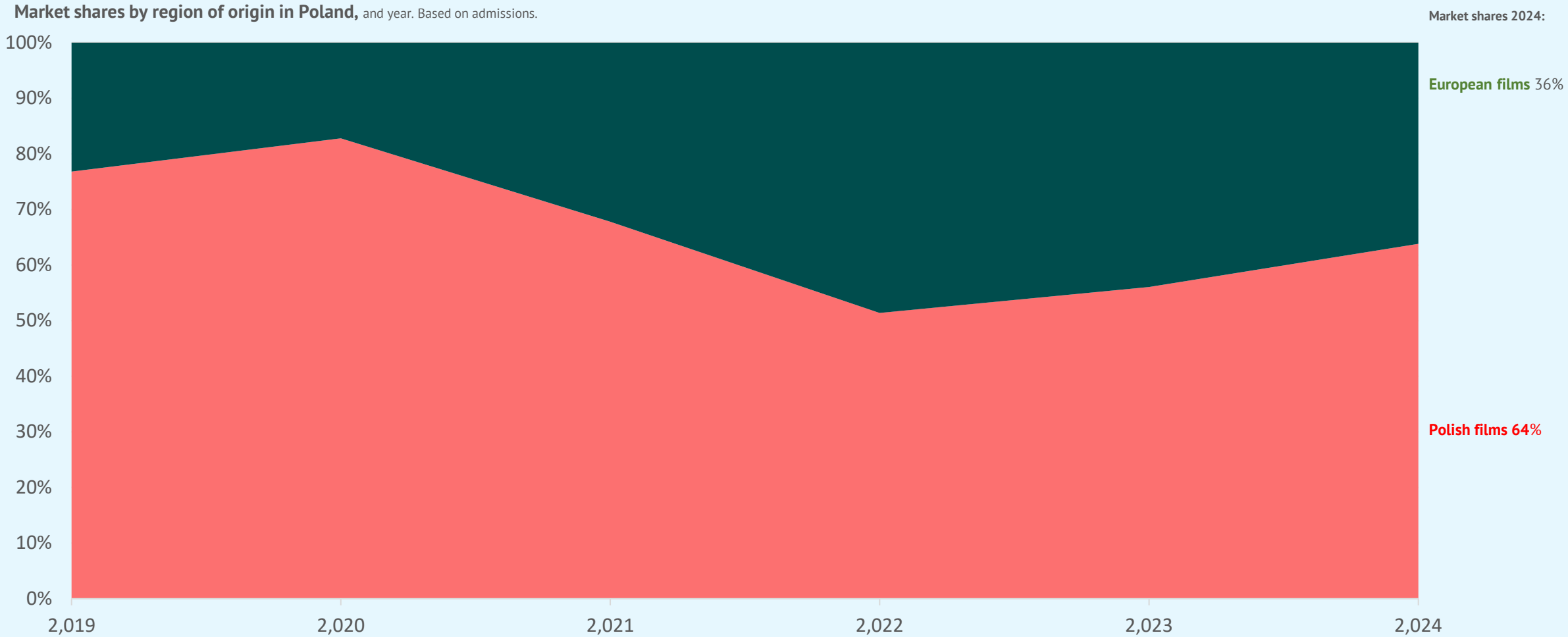
Local break-out hits that achieved more than 80% of admissions in their country of origin.

Since the drop in US films in 2020 due to the pandemic crisis, European market shares in Poland have returned to their usual level.

Market shares by region of origin in Poland, and year. Based on admissions.























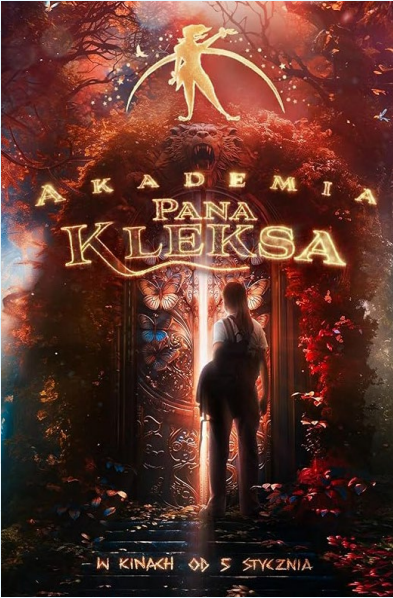
Polish films in Poland accounted for 64% of European admissions in 2024, the highest share since 2021



For the first time since 2018 excluding the pandemic years, a Polish film topped Poland's top 20 films.





















Top 20 films in Poland, in 2024. Ranked by total admissions.

	Title	First country of origin, director	Total admissions
1	Akademia pana Kleksa	 Maciej Kawulski	2.9 m.
2	Inside Out 2	 Kelsey Mann	2.7 m.
3	Despicable Me 4	 Chris Renaud, Patrick Delage	2.3 m.
4	Listy do M. Pożegnania i powroty	 Lukasz Jaworski	1.9 m.
5	Moana 2	 David G. Derrick Jr.	1.9 m.
6	Dune: Part Two	 Denis Villeneuve	1.7 m.
7	Deadpool & Wolverine	 Shawn Levy	1.7 m.
8	Kung Fu Panda 4	 Mike Mitchell, Stephanie Stine	1.1 m.
9	Migration	 Benjamin Renner, Guylo Homsy	1.1 m.
10	Gladiator II	 Ridley Scott	1.1 m.
11	The Garfield Movie	 Mark Dindal	1.1 m.
12	Sami swoi. Początek	 Artur Zmijewski	0.8 m.
13	Mufasa: The Lion King	 Barry Jenkins	0.8 m.
14	Paddington in Peru	 Dougal Wilson	0.8 m.
15	Venom: the Last Dance	 Kelly Marcel	0.7 m.
16	The Wild Robot	 Chris Sanders	0.6 m.
17	Za duży na bajki 2	 Kristoffer Rus	0.6 m.
18	Baby boom czyli Kogel Mogel 5	 Anna Wieczur-Bluszcz	0.6 m.
19	Budda. Dzieciak '98	 Krystian Kuczkowski, Kamil Labudda	0.6 m.
20	Beetlejuice Beetlejuice	 Tim Burton	0.6 m.



Most biggest European films in Poland were Polish films, followed by British and French films.

Top 20 European films in Poland, in 2024. Ranked by total admissions.

	Title	First country of origin, director	Total admissions
1	Akademia pana Kleksa	 Maciej Kawulski	2.9 m.
2	Listy do M. Pożegnania i powroty	 Lukasz Jaworski	1.9 m.
3	Sami swoi. Początek	 Artur Zmijewski	0.8 m.
4	Paddington in Peru	 Dougal Wilson	0.8 m.
5	Za duży na bajki 2	 Kristoffer Rus	0.6 m.
6	Baby boom czyli Kogel Mogel 5	 Anna Wieczur-Bluszcz	0.6 m.
7	Budda. Dzieciak '98	 Krystian Kuczkowski, Kamil Labudda	0.6 m.
8	Le dernier jaguar	 Gilles de Maistre	0.4 m.
9	The Substance	 Coralie Fargeat	0.4 m.
10	Poor Things	 Yorgos Lanthimos	0.4 m.
11	U Pana Boga w Królowym Moście	 Jacek Bromski	0.4 m.
12	The Zone of Interest	 Jonathan Glazer	0.3 m.
13	Fuks 2	 Maciej Dutkiewicz	0.3 m.
14	Kos	 Paweł Masłona	0.3 m.
15	Biała odwaga	 Marcin Koszałka	0.3 m.
16	Les As de la Jungle 2	 L. Bru, Y. Moulin, B. Somville	0.3 m.
17	10 Lives	 Christopher Jenkins	0.3 m.
18	Anatomie d'une chute	 Justine Triet	0.2 m.
19	Back to Black	 Sam Taylor-Johnson	0.2 m.
20	Conclave	 Edward Berger	0.2 m.

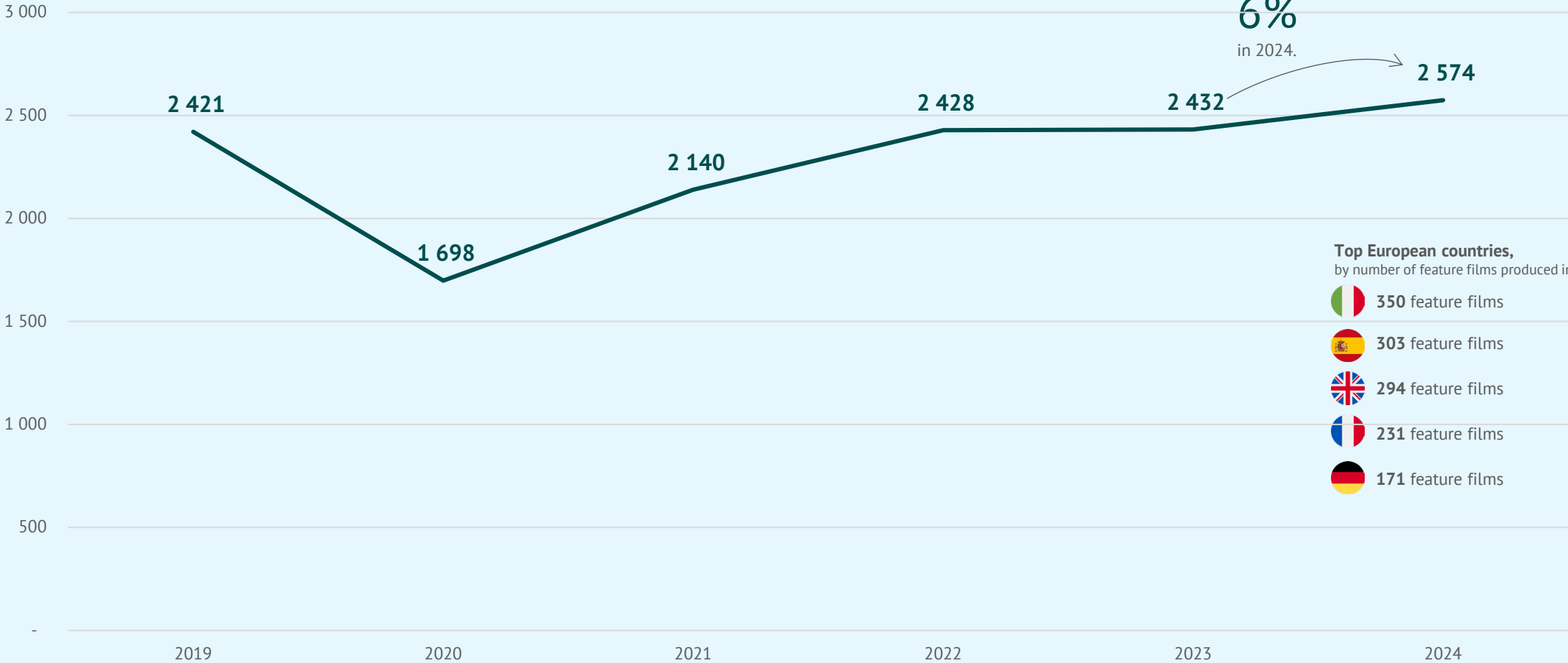


04






Film production

Film production in Europe reached an all-time high in 2024, with over 2 500 feature films produced.

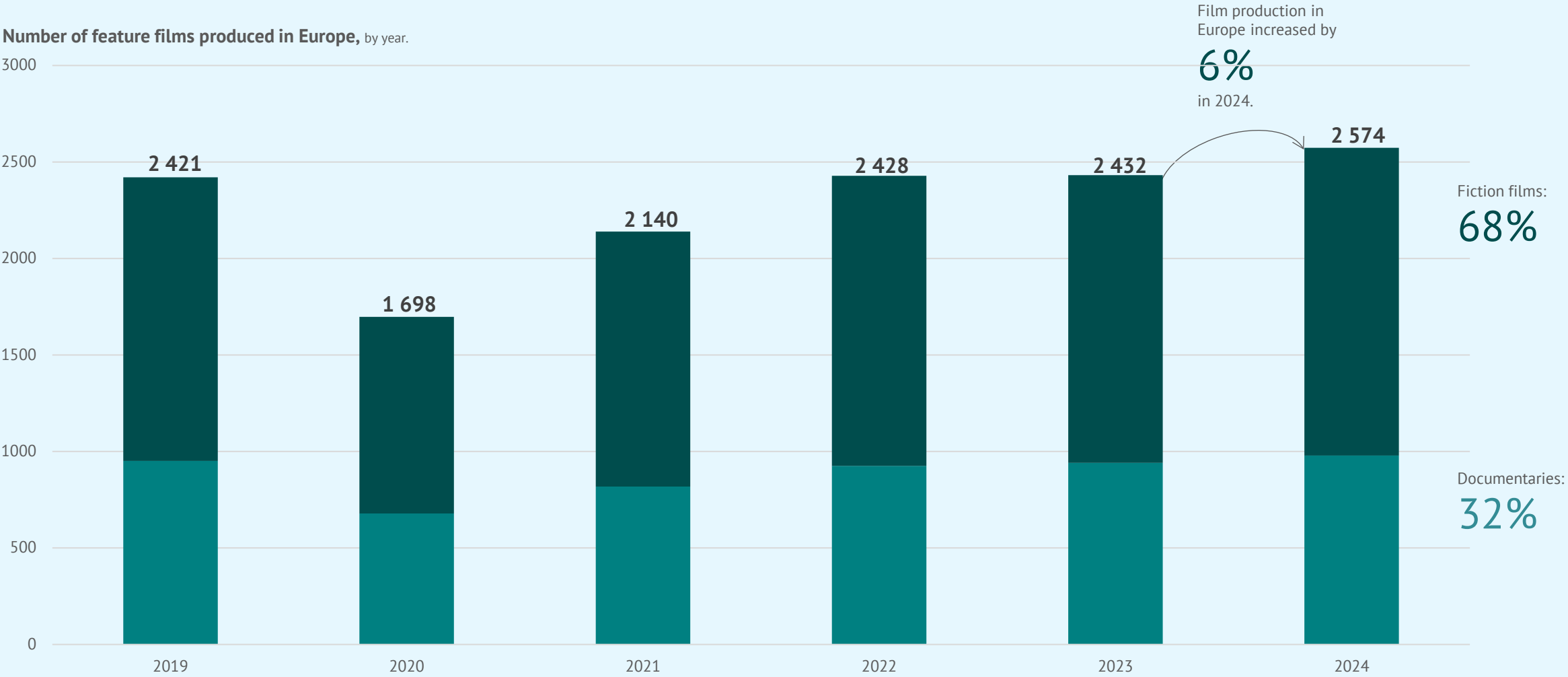
Number of feature films produced in Europe, by year.



Top European countries, by number of feature films produced in 2024.

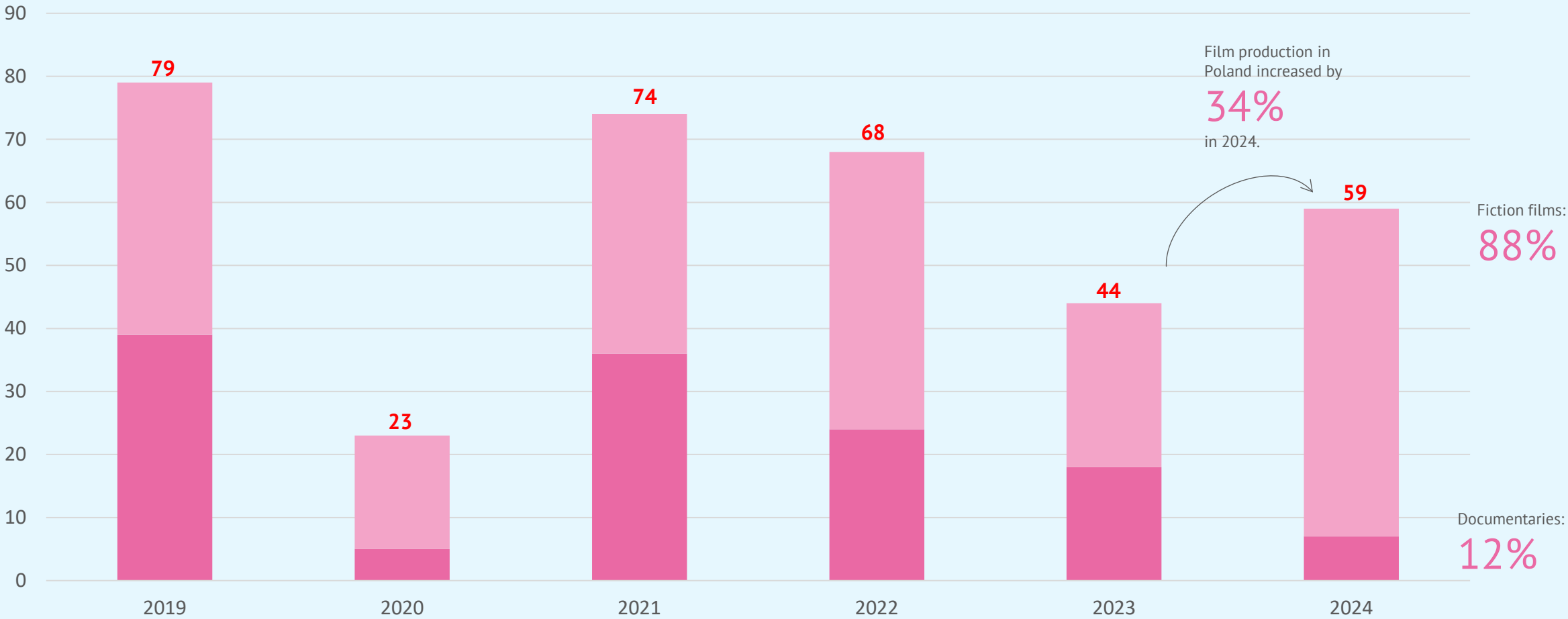
-  350 feature films
-  303 feature films
-  294 feature films
-  231 feature films
-  171 feature films

Film production in Europe reached an all-time high in 2024, with over 2 500 feature films produced.



After a continuous decline since 2021, Polish film production rebounded in 2024 due to a doubling of the number of fiction films produced

Number of feature films produced in Poland, by year.



18 from the Top 20 biggest Polish films in 2024 achieved more than 90% of their admissions in Poland

Top 20 Polish films, in 2024. Ranked by total admissions.			
	Title	First country of origin, director	Total admissions
1	Akademia pana Kleksa	Maciej Kawulski	2.9 m.
2	Listy do M. Pożegnania i powroty	Lukasz Jaworski	2.0 m.
3	Sami swoi. Początek	Artur Zmijewski	0.9 m.
4	Baby boom czyli Kogel Mogel 5	Anna Wieczur-Bluszcz	0.6 m.
5	Za duży na bajki 2	Kristoffer Rus	0.6 m.
6	Budda. Dzieciak '98	Krzysztof Kuczkowski, Kamil Labudda	0.6 m.
7	U Pana Boga w Królowym Moście	Jacek Bromski	0.4 m.
8	Fuks 2	Maciej Dutkiewicz	0.3 m.
9	Kos	Paweł Masłona	0.3 m.
10	Biała odwaga	Marcin Koszałka	0.3 m.
11	Czerwone maki	Krzysztof Łukaszewicz	0.2 m.
12	Kicia Kocia w przedszkolu	Marta Strojczyka	0.2 m.
13	Miłość jak miód	Maciej Migas	0.2 m.
14	Pieczęć Mickiewicza	Sara Bustamante-Drozdek	0.2 m.
15	Simona Kossak	Adrian Panek	0.2 m.
16	Niepewność	Waldemar Szarek	0.2 m.
17	Smok Diplodok	Wojtek Wawrzczyk	0.2 m.
18	Zielona granica	Agnieszka Holland	0.2 m.
19	Chłopi	Dorota Kobiela, Hugh Welchman	0.1 m.
20	Kulej. Dwie strony medalu	Xawery Żulawski	0.1 m.

7 out of 20 biggest Polish films achieved all of their admissions in Poland

Only two Polish films from the top 20 achieved less than 20% of their admissions outside Poland