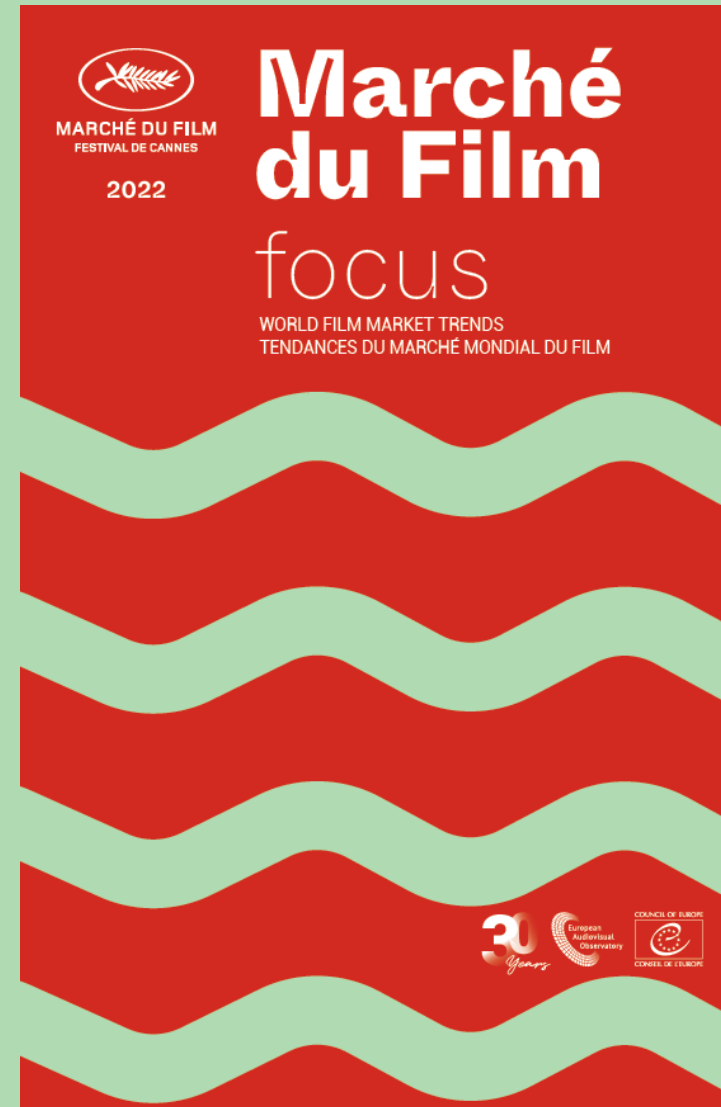


# FOCUS 2022

WORLD FILM MARKET TRENDS



# Meet our panel

## **Gilles Fontaine**

Head of Dept for Market Information  
European Audiovisual Observatory

## **Martin Kanzler**

Deputy Head of Dept for Market Information  
European Audiovisual Observatory

## **Laurent Dutoit**

CEO  
Agora Films

## **Peter Fornstam**

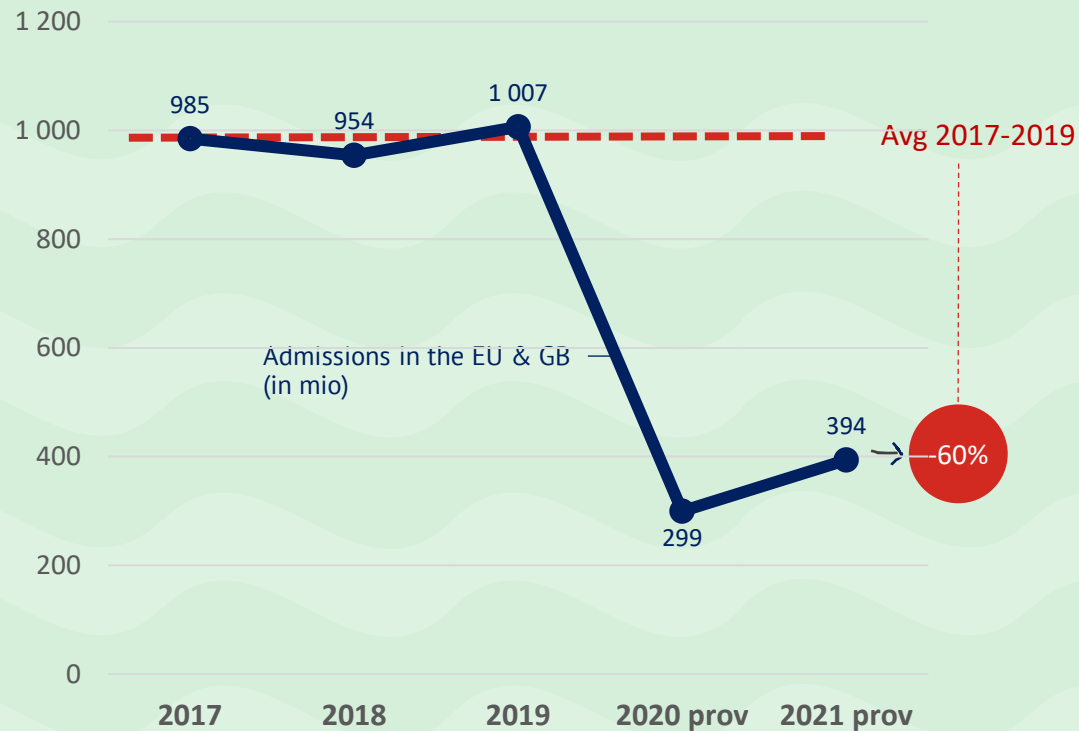
Founder & Director  
Svenska Bio

## **Michael Ryan**

Director  
GFM Animation

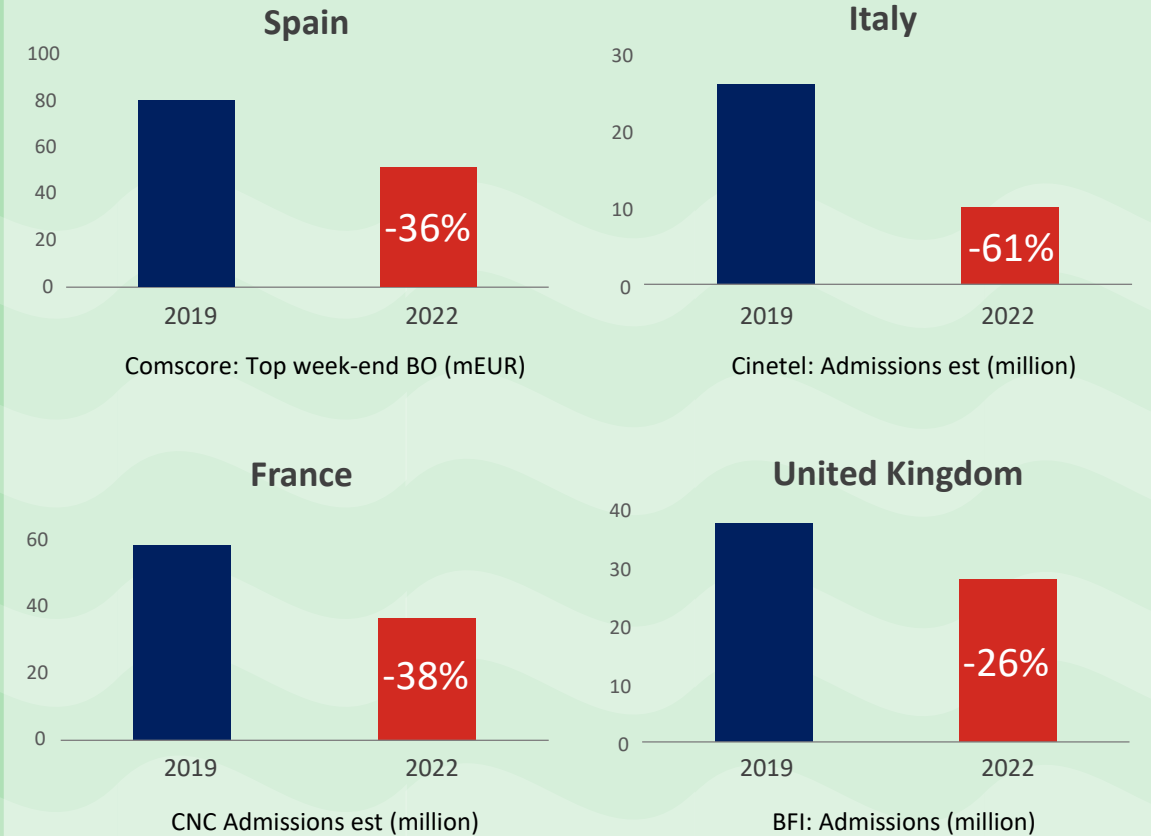
# Will cinema admissions fully recover?

## Slow recovery in 2021 but ...



Source: European Audiovisual Observatory (EAO)

## ... Q1 2022 remains under 2019 levels



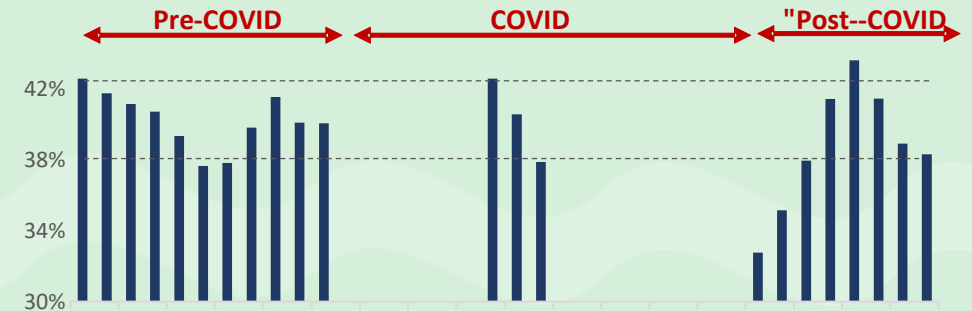
# Why is part of the audience still missing?

## The screens are still there ...



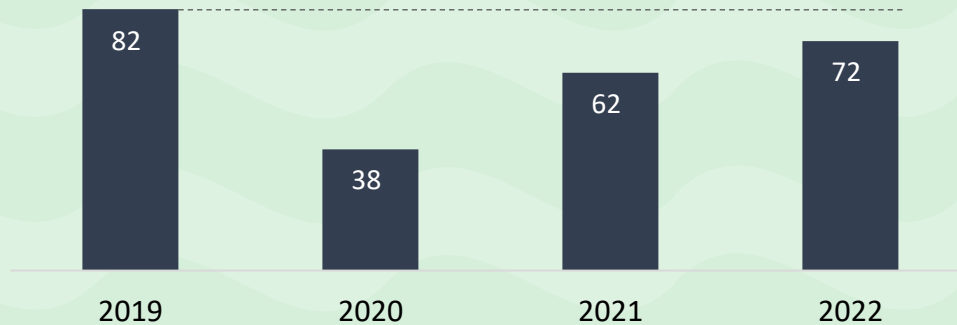
Nr of screens in Europe 28 (est) / Source: EAO

## ... older cinema goers are not to blame ...



France: Share of cinema-goers age 50 or more (in %) / Source: CNC

## ... US studio titles are back ...



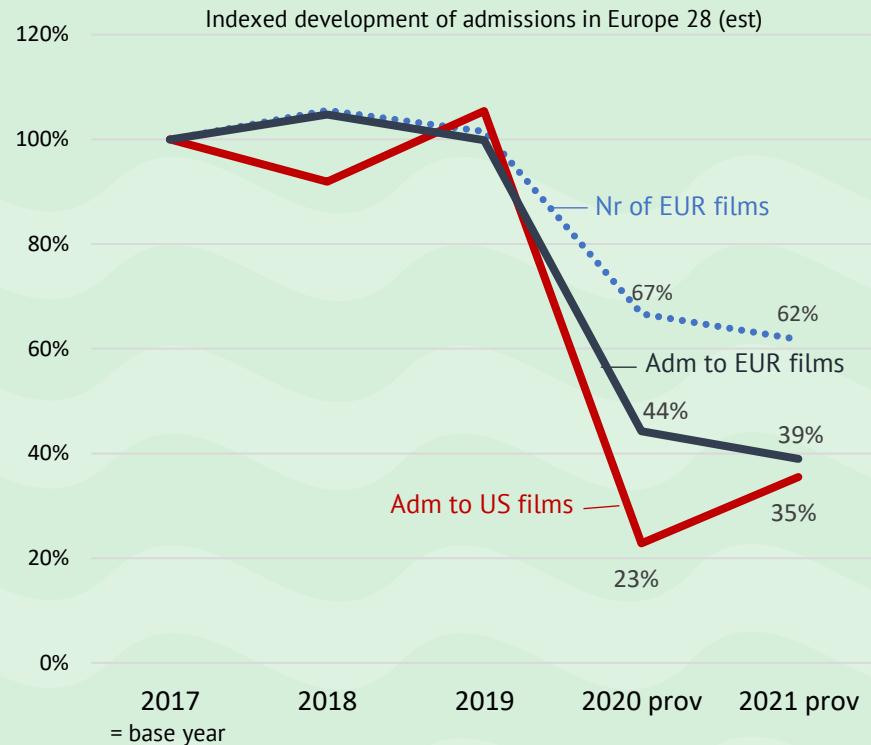
Source: Variety, insider.com February 2022. Provisional

... **PLUS exclusive titles** for platforms

e.g. 21 Disney titles exclusively for Hulu / Disney+

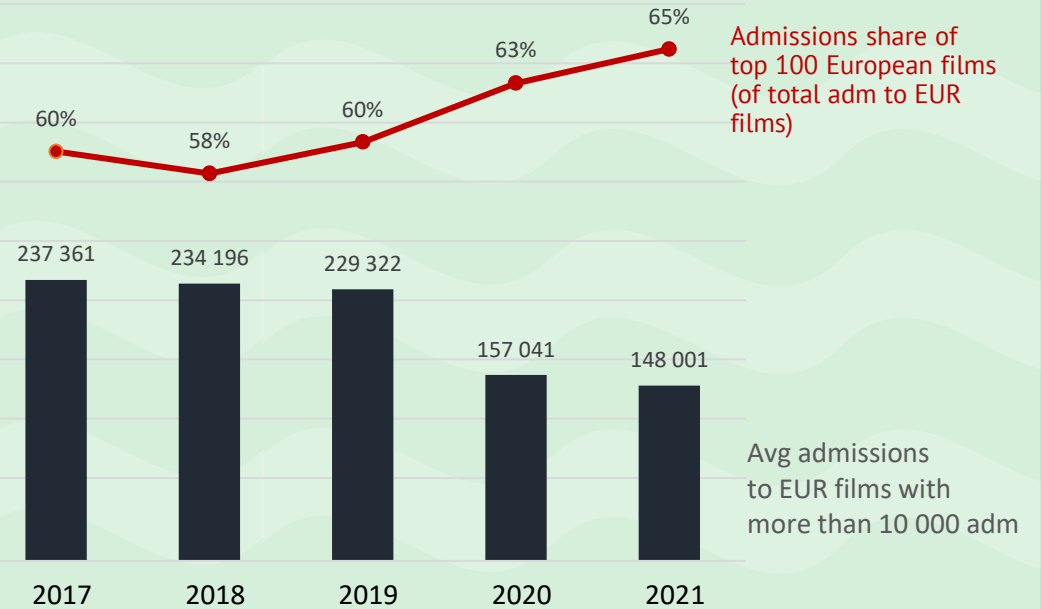
# No recovery for European films in 2021: Trend or correction?

## Admissions to European films decline in 2021 ...



Source: European Audiovisual Observatory (EAO)

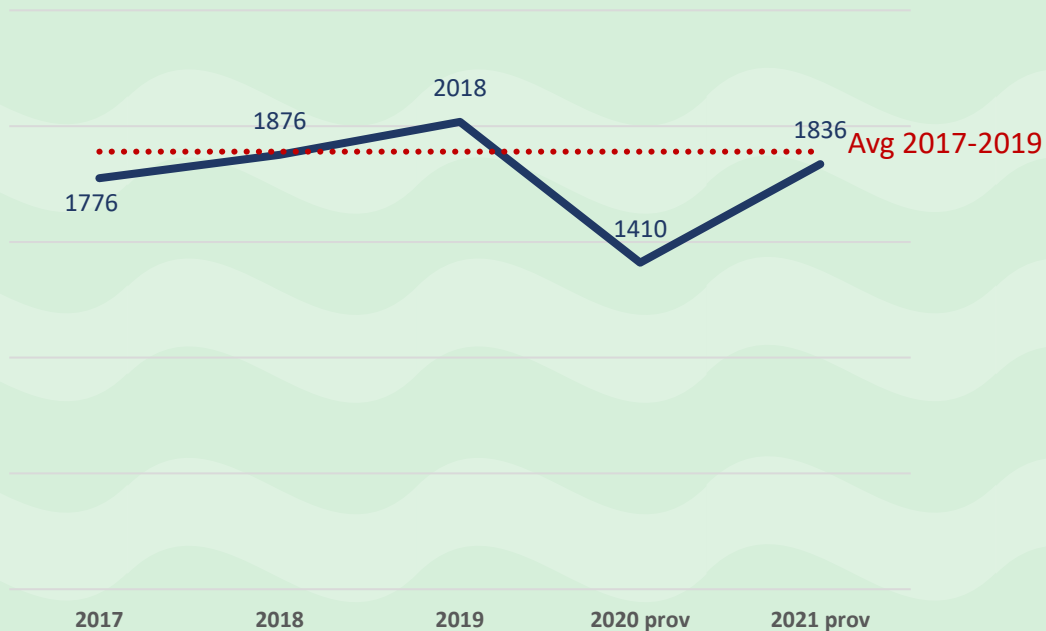
## ... fewer adm per film and higher concentration



Source: European Audiovisual Observatory (EAO)

# Film production: catch-up or back to normal?

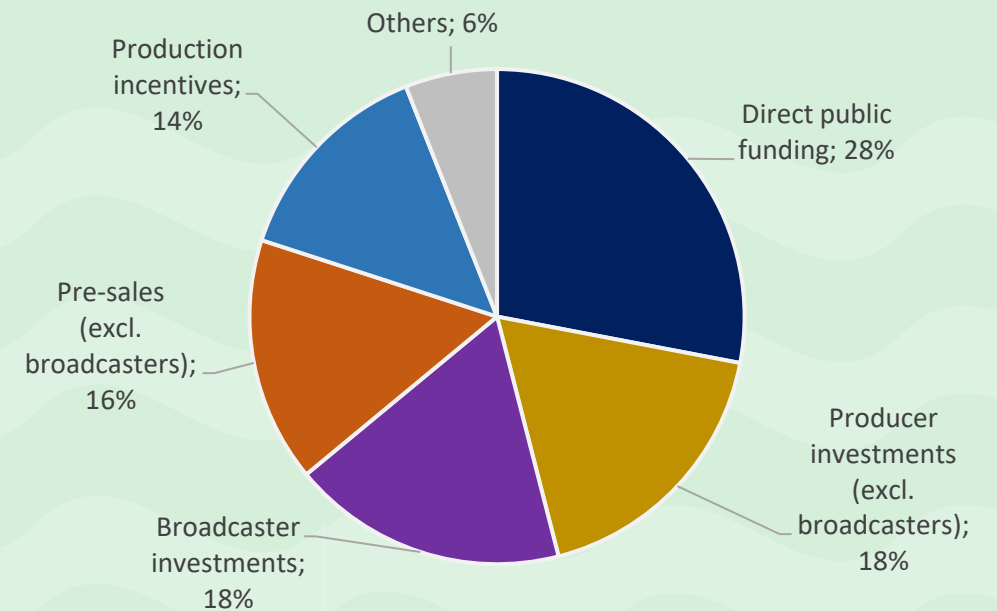
## Production level back to 2017-2019 average



Nr of feature films produced in the EU & GB

Source: European Audiovisual Observatory (EAO)

## Impact on financing of feature films ?



Breakdown of film financing by source (2019)

Source: European Audiovisual Observatory (EAO)

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