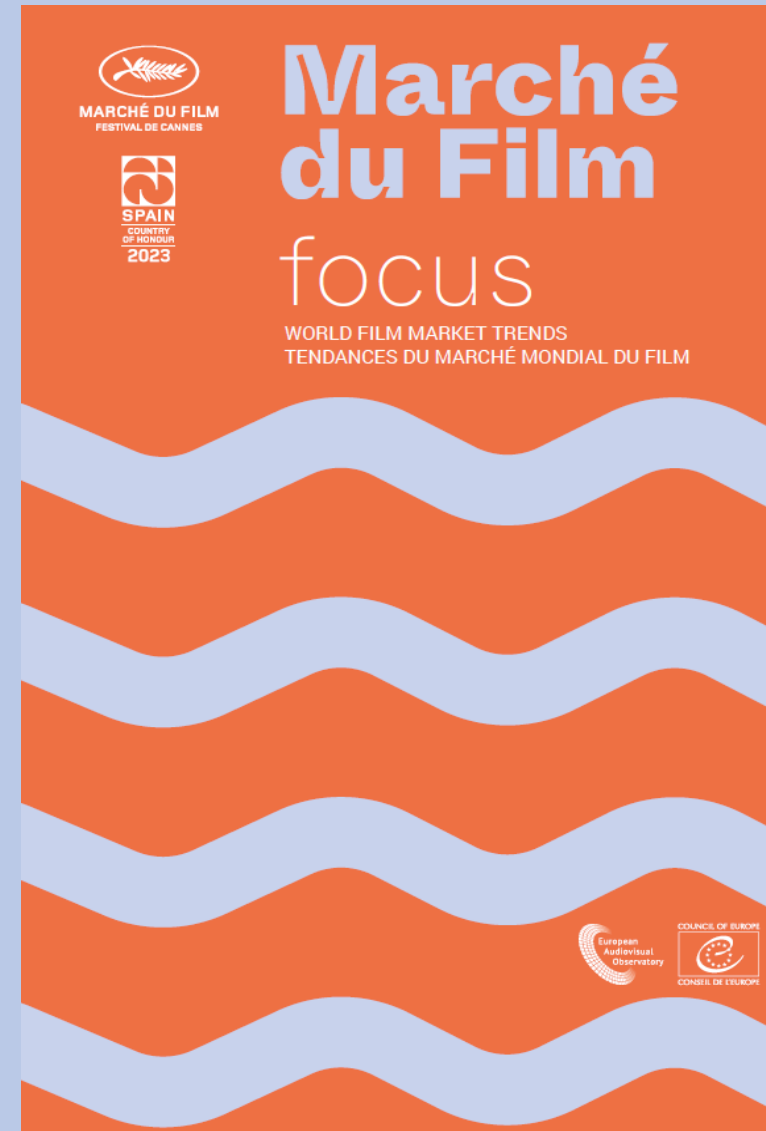


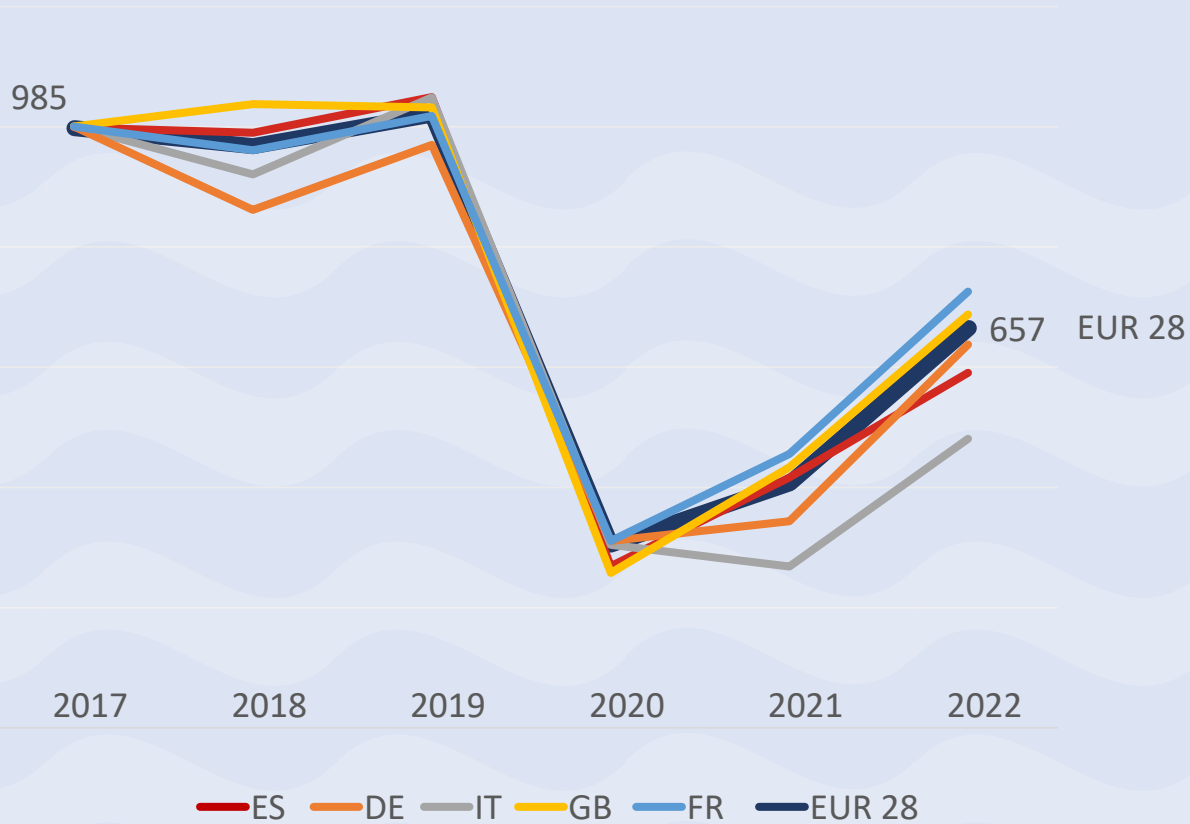
FOCUS 2023

WORLD FILM MARKET TRENDS



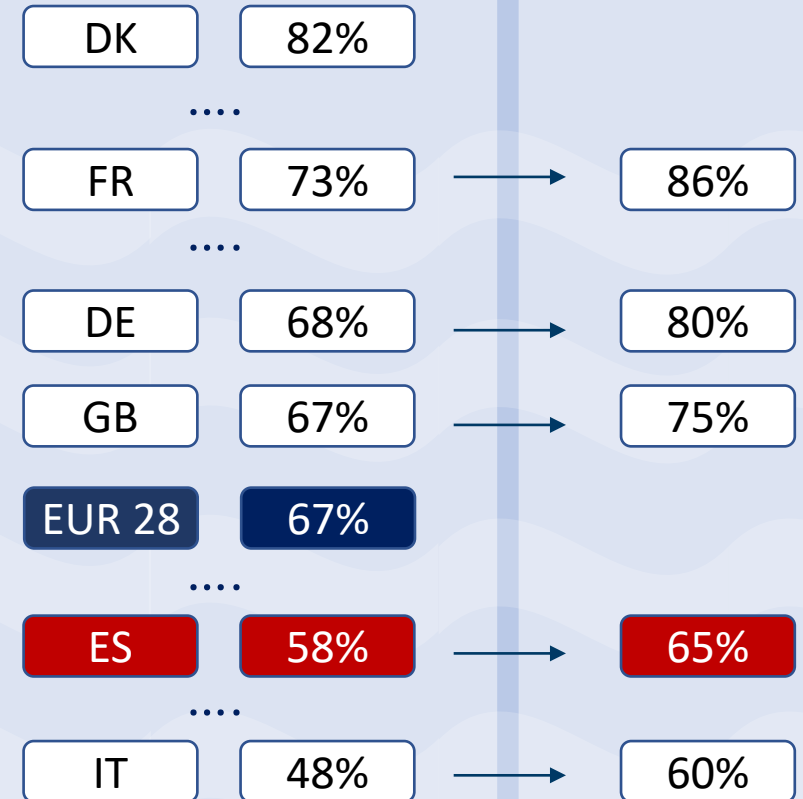
Admissions down by 33% in 2022

Admissions in the EU & GB 2017 to 2022



Source: European Audiovisual Observatory (EAO)

2022 recovery rates



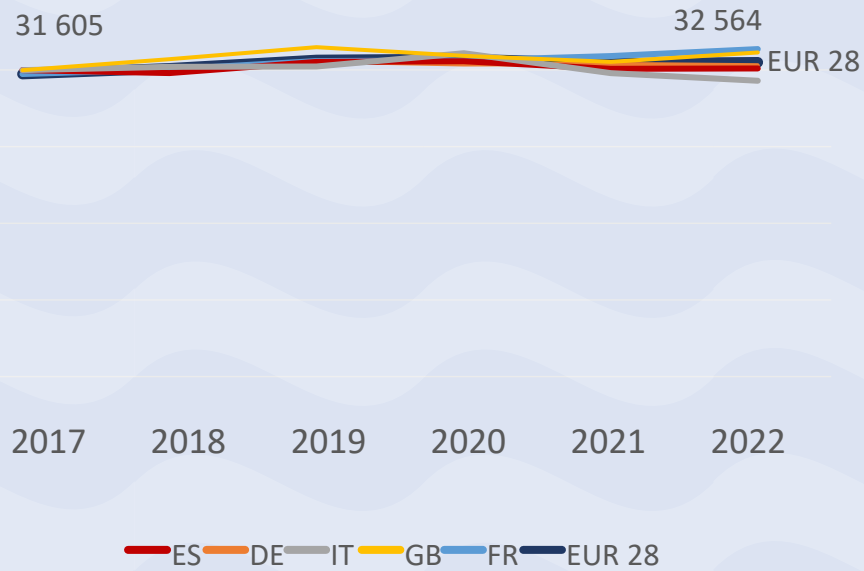
Source: European Audiovisual Observatory (EAO)

2023 recovery rates Jan-Apr

Source: European Audiovisual Observatory (EAO)

European screen base did not shrink (at all)

Screens in the EU & GB 2017 to 2022



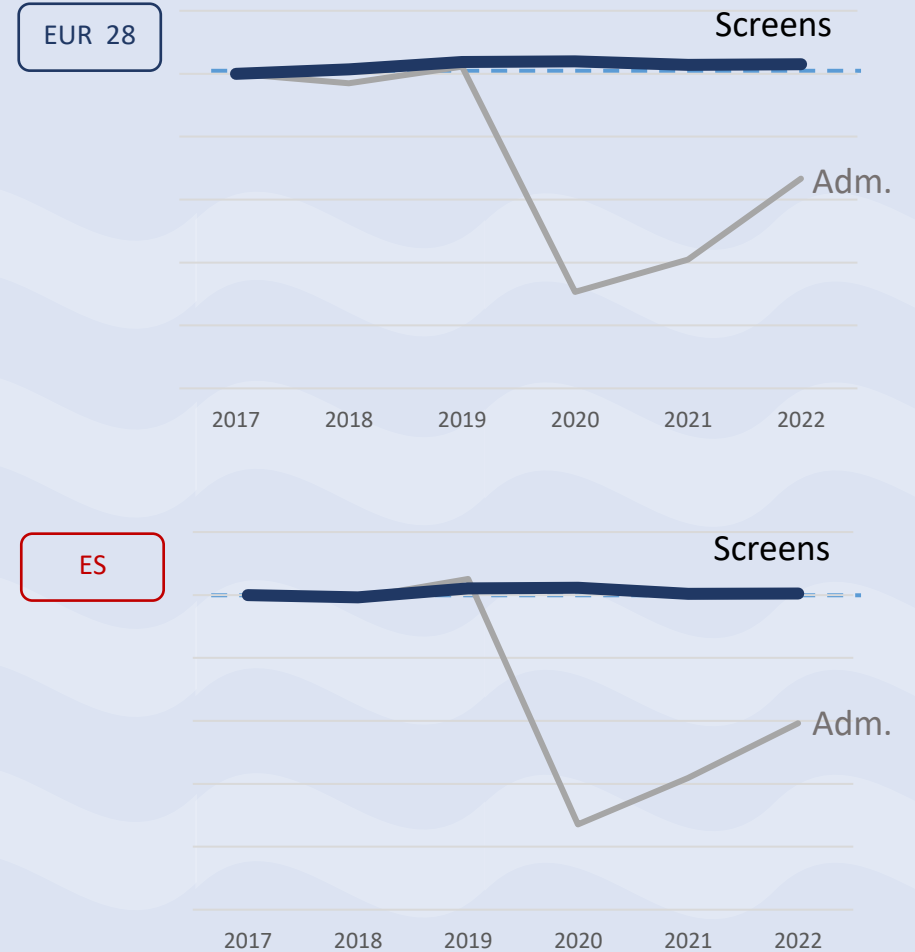
Source: European Audiovisual Observatory (EAO)

Recovery rates



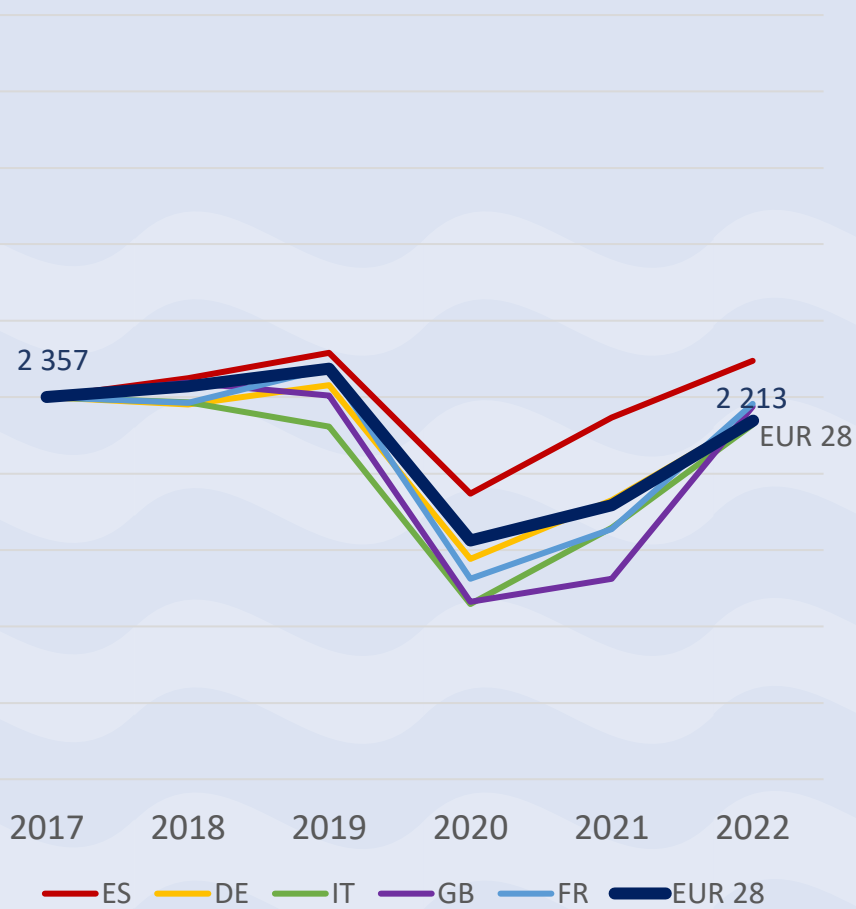
Source: European Audiovisual Observatory (EAO)

Indexed screens vs admissions



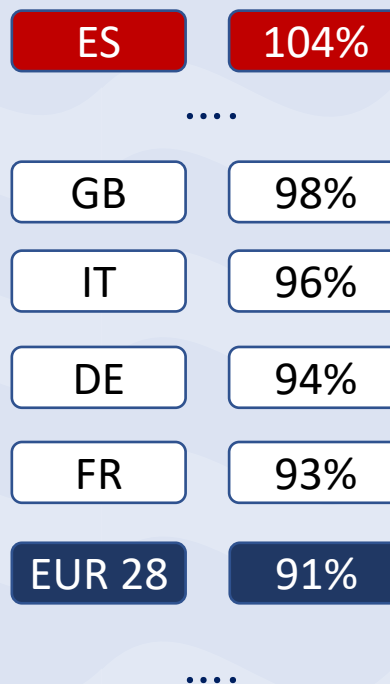
Number of first releases (almost) back to normal levels ...

First releases (est)



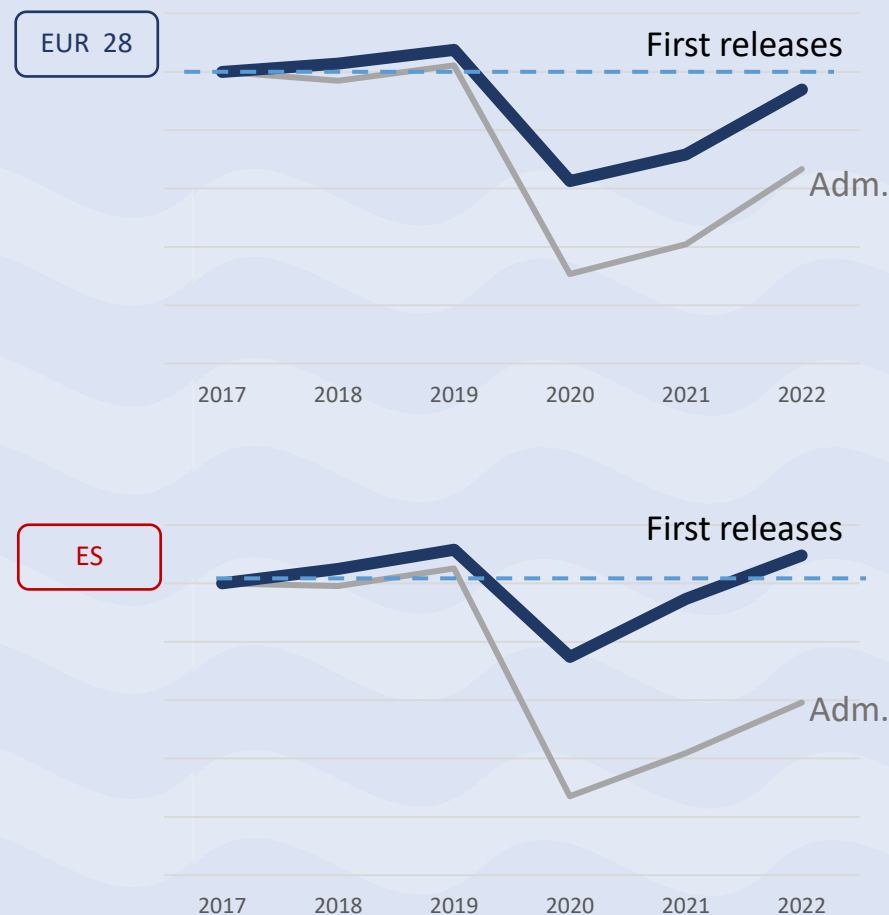
Source: European Audiovisual Observatory (EAO) / LUMIERE

Recovery rates

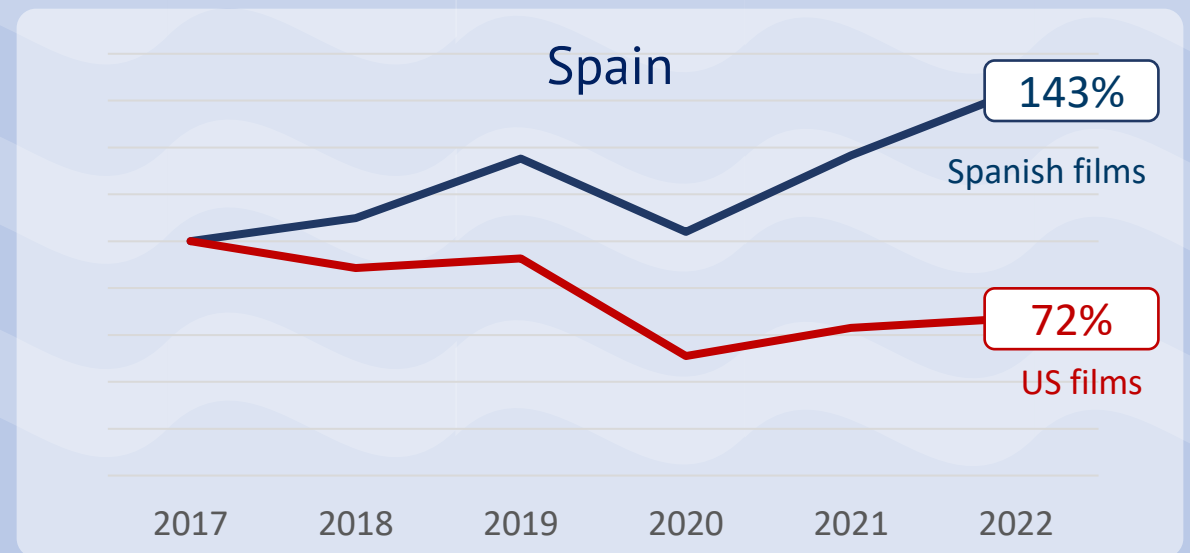
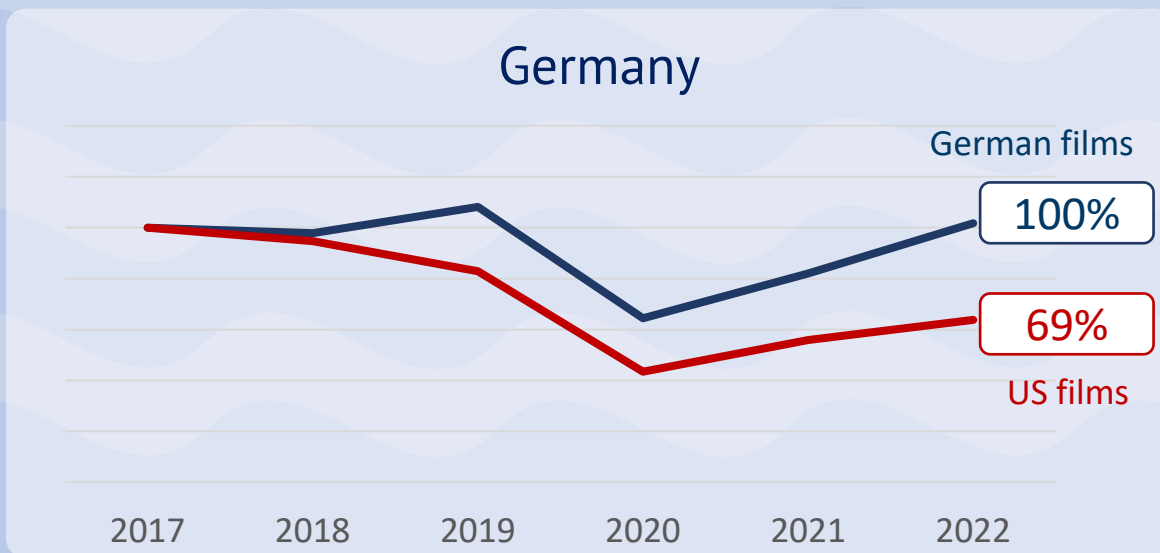
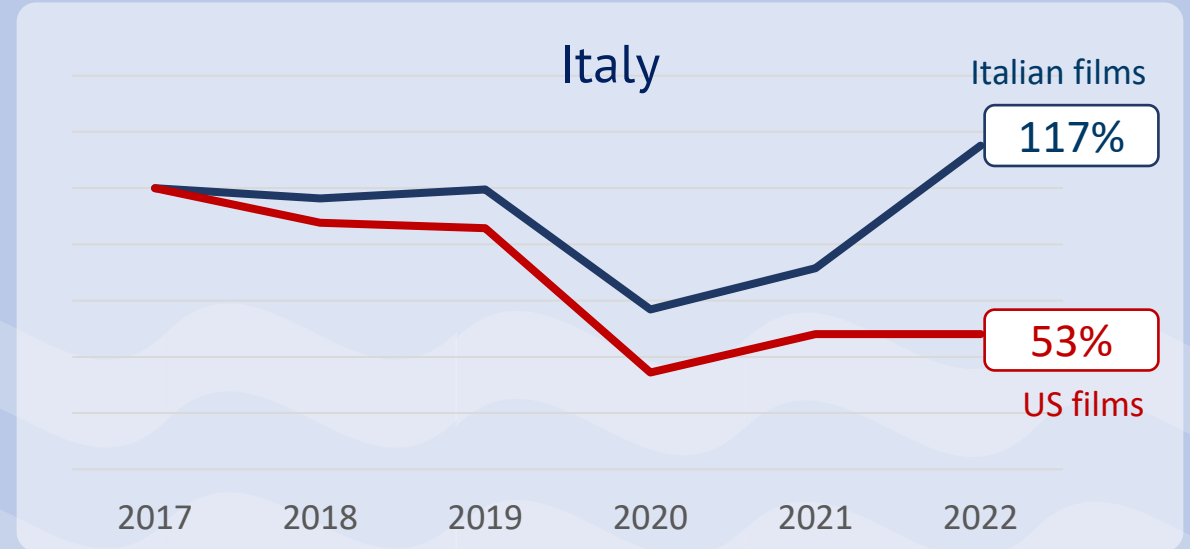
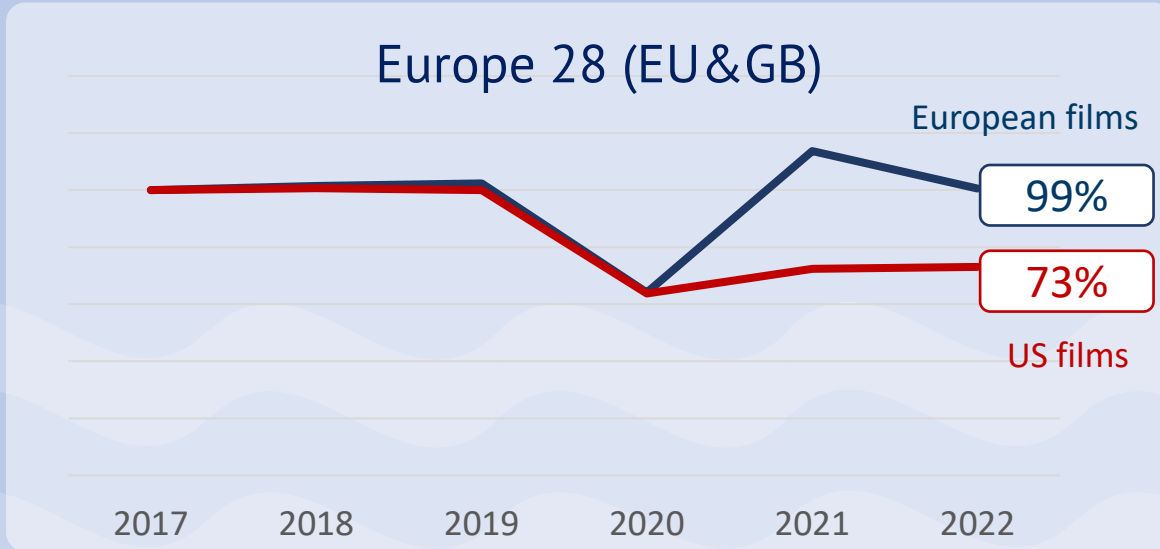


Source: European Audiovisual Observatory (EAO)

Indexed first releases vs admissions



... that is, (national) European films but fewer US titles



European charts again dominated by US studio titles

Top 20 films in Europe 28 - 2022

Rank	Original title	Country of origin	Admissions prov
1	Top Gun: Maverick	US	34 448 555
2	Avatar: The Way of Water	US	30 616 827
3	Minions: The Rise of Gru	US	30 224 524
4	Doctor Strange in the Multiverse of Madness	US	19 997 651
5	Jurassic World: Dominion	US CN	18 122 320
6	Thor: Love and Thunder	US	17 977 694
7	The Batman	US	17 573 872
8	Fantastic Beasts: The Secrets of Dumbledore	GB Inc US	14 974 458
9	Black Panther: Wakanda Forever	US	14 935 168
10	Uncharted	US DE	13 768 468
11	Sonic the Hedgehog 2	US JP	12 634 129
12	Spider-Man: No Way Home	US	12 500 847
13	Sing 2	US	10 588 630
14	Black Adam	US CA NZ HU	9 880 005
15	Elvis	US AU	8 981 174
16	DC League of Super-Pets	US	7 626 901
17	Smile	US	7 527 678
18	Bullet Train	US JP	7 095 505
19	Ticket to Paradise	US GB	6 772 541
20	The Bad Guys	US	6 259 200

Source: European Audiovisual Observatory (EAO) / LUMIERE

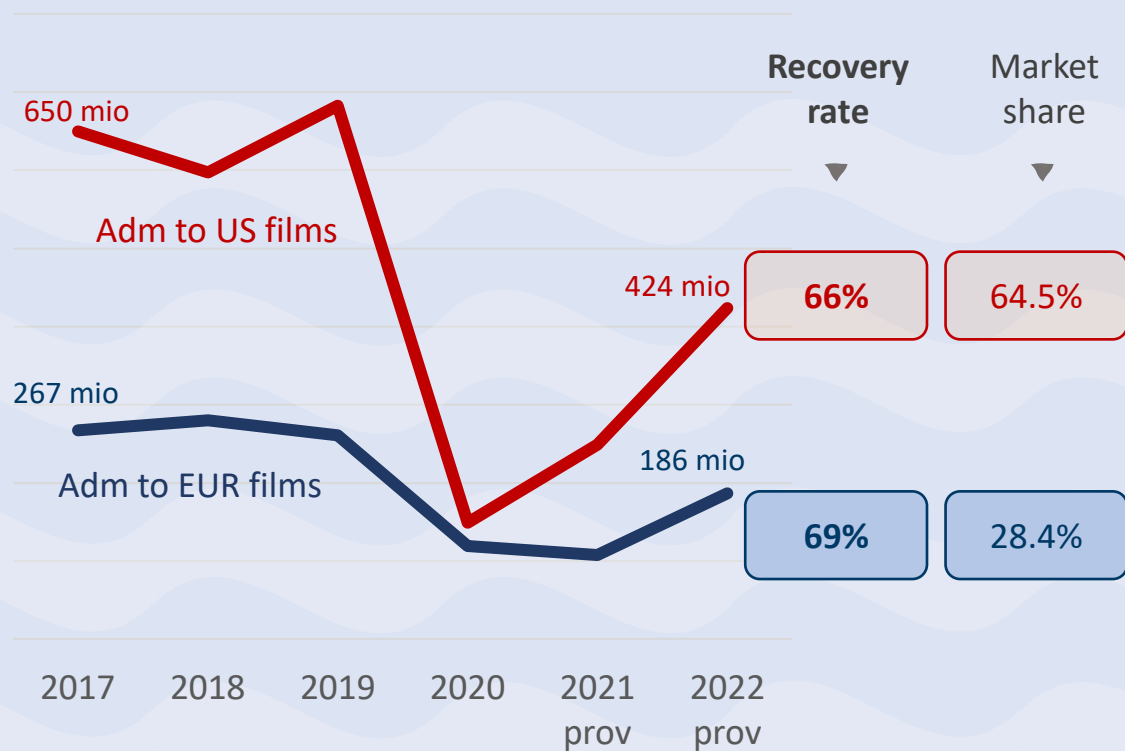
Top 20 films in Spain - 2022

Rank	Original title	Country of origin	Admissions prov
1	Avatar: The Way of Water	US	3 436 626
2	Minions: The Rise of Gru	US	3 258 514
3	Jurassic World Dominion	US CN	2 758 930
4	Padre no hay más que uno 3 (Father There ...)	ES	2 432 337
5	Doctor Strange in the Multiverse of Madness	US	1 945 159
6	Uncharted	US DE	1 893 179
7	Tad the Lost Explorer and the Emerald Tablet	ES	1 779 186
8	Thor: Love and Thunder	US	1 681 700
9	The Batman	US	1 627 996
10	Spider-Man: No Way Home	US	1 514 633
11	Top Gun: Maverick	US	1 479 918
12	Fantastic Beasts: The Secrets of Dumbledore	GB Inc US	1 334 398
13	Sonic the Hedgehog 2	US JP	1 311 951
14	The Bad Guys	US	1 192 369
15	Bullet Train	US JP	1 134 119
16	Black Panther: Wakanda Forever	US	1 096 587
17	Sing 2	US	1 090 235
18	Black Adam	US CA NZ HU	936 869
19	Smile	US	838 669
20	Los renglones torcidos de Dios (God's Crooked Lines)	ES	830 286

Source: ICAA, European Audiovisual Observatory (EAO)

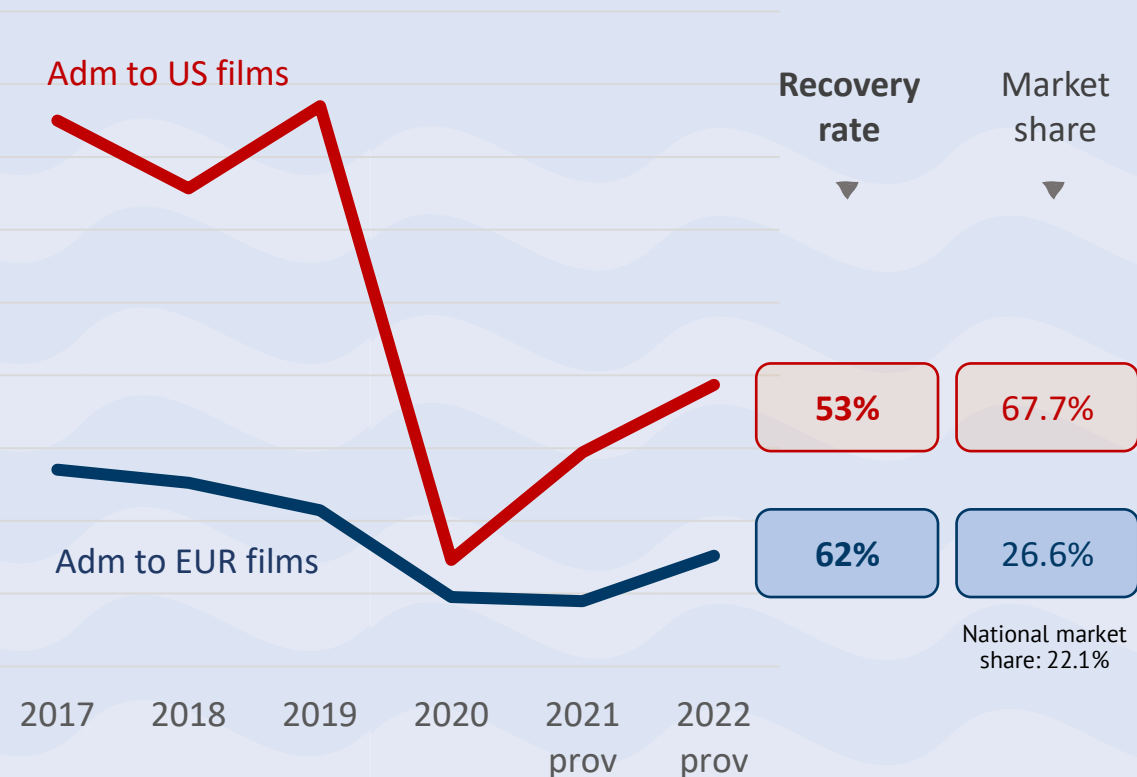
Admissions to EUR films recover slightly better than US films

Adm breakdown by origin (est) – Europe 28



Source: European Audiovisual Observatory (EAO) / LUMIERE

Adm breakdown by origin - Spain

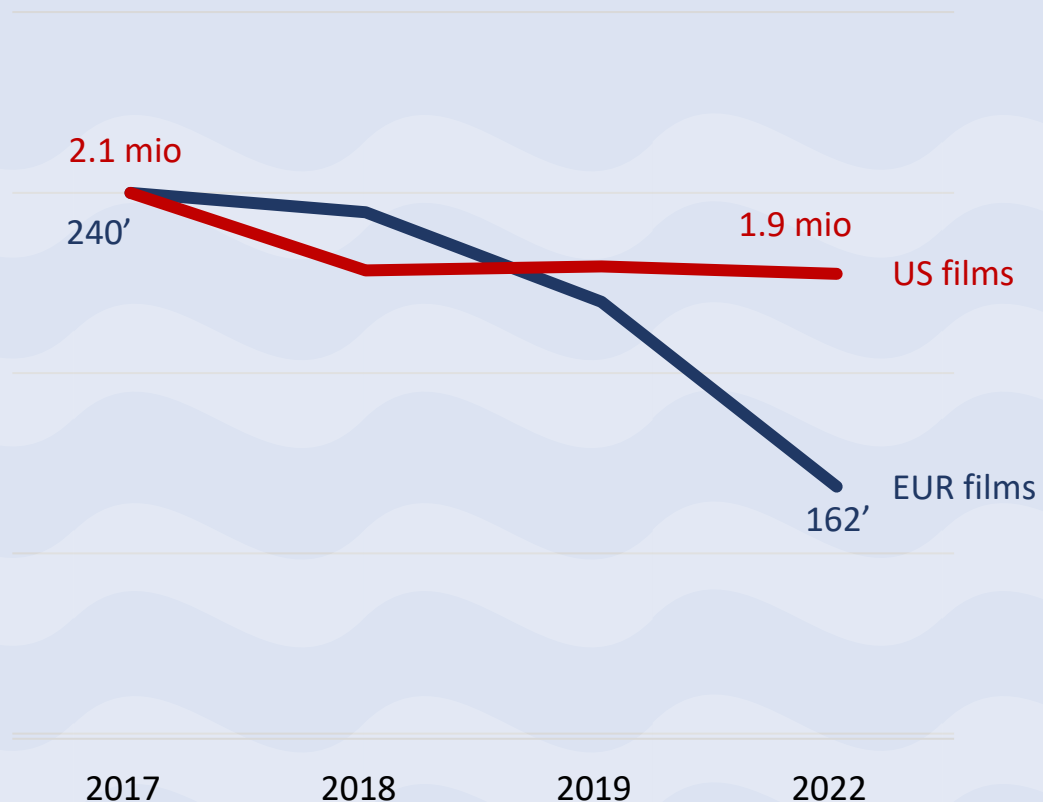


Source: European Audiovisual Observatory (EAO) LUMIERE / ICAA

Average admissions down, concentration up

Avg annual admissions of US and EUR films

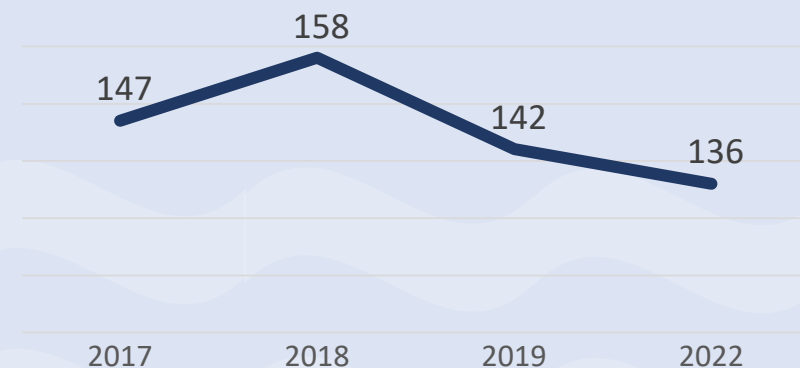
Calculated only for films selling more than 10 000 tickets. Indexed.



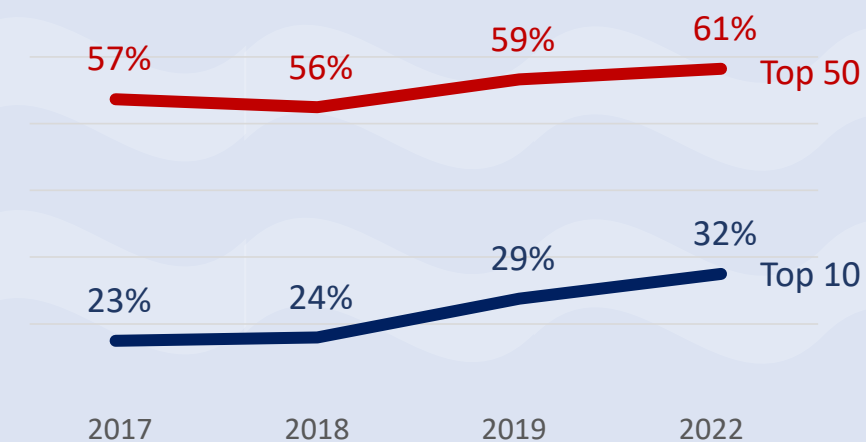
Source: European Audiovisual Observatory (EAO)

Nr of films taking 80% of admissions*

* As registered in LUMIERE

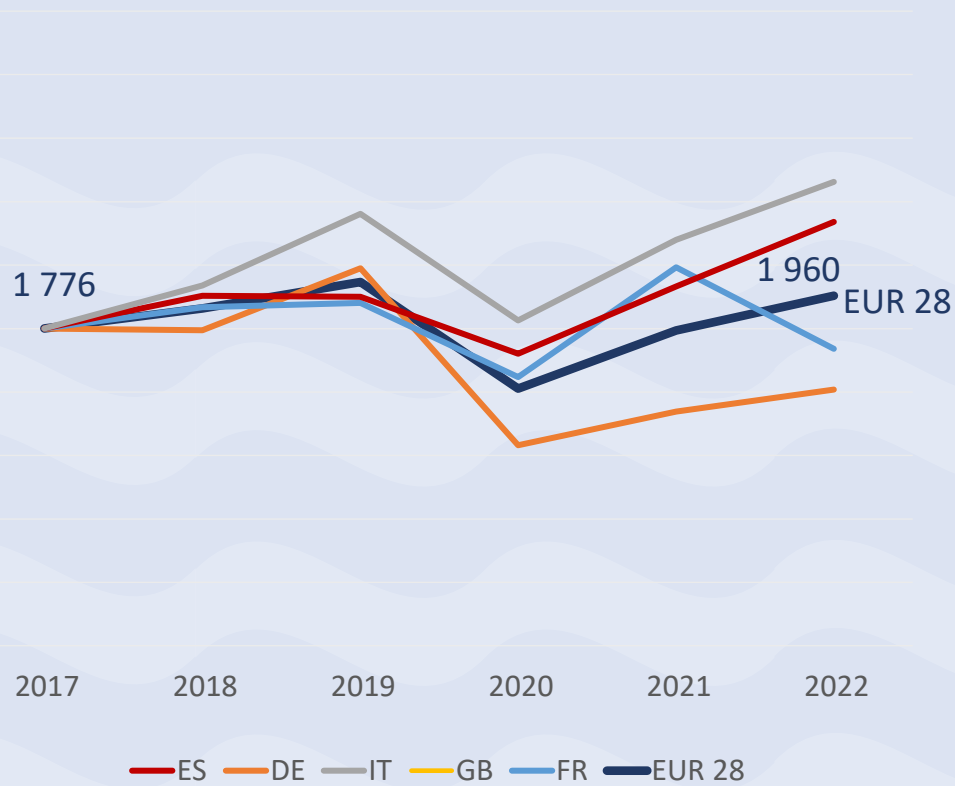


Share of top 10 and top 50 films



Productions seemingly unaffected by box office decline

Films produced

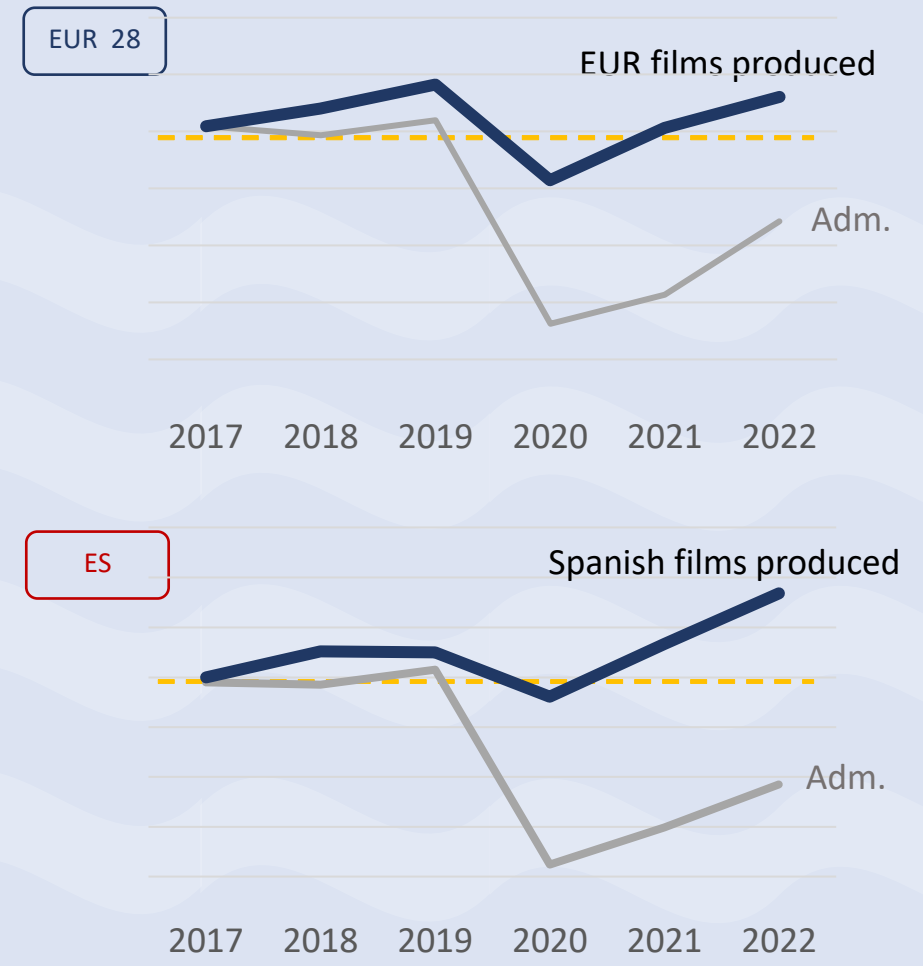


Source: European Audiovisual Observatory (EAO)

Recovery rates

SI	150%
SK	150%
....	
IT	125%
ES	125%
....	
EUR 28	103%
....	
FR	89%
....	
DE	76%

Indexed films produced vs admissions



Film policy priorities : quo vadis?

Inter alia:

... Increasing importance of production incentives

... Gender and inclusion

... Increasing focus on sustainability

... Securing talent pool

Pick up a
free copy



Observatory stand H.1

