



# European cinema market trends

*The beginning of a new normal?*

Europa Cinemas Exhibitors Meeting  
*Cannes 2024*

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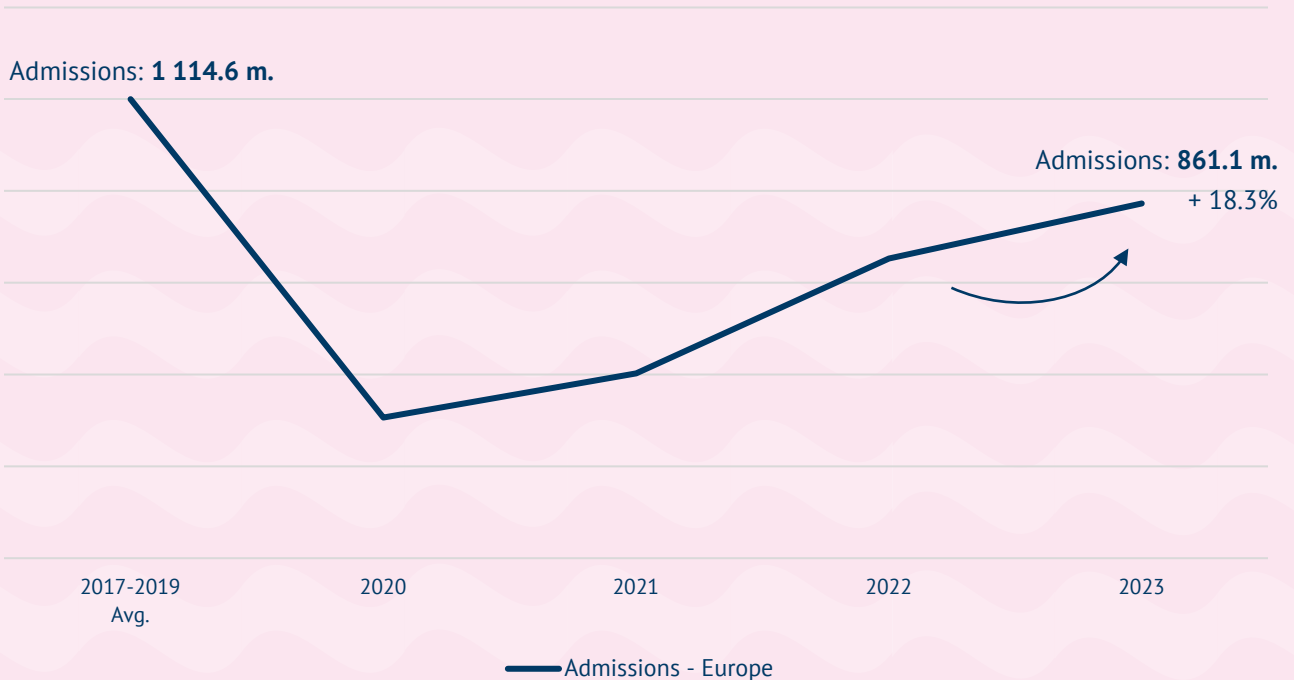


**Box office**

# Cinema attendance grows to 861 million tickets...

## Admissions and GBO in Europe

Indexed. 2017 - 2023



# ...while GBO reaches 6.7 billion

## Admissions and GBO in Europe

Indexed. 2017 - 2023

GBO: **EUR 7.6 bn.**  
Admissions: **1 114.6 m.**

GBO: **EUR 6.7 bn.**  
+ 22.3%

Admissions: **861.1 m.**  
+ 18.3%

2017-2019  
Avg.

2020

2021

2022

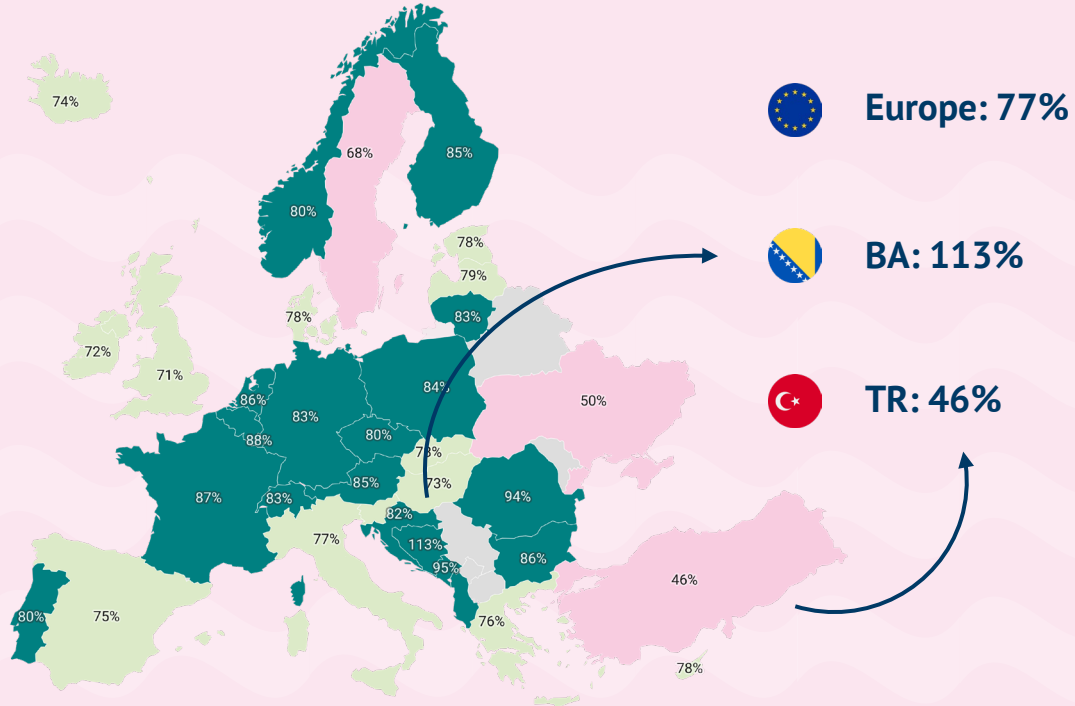
2023

— Admissions - Europe

▬ GBO - Europe

# Towards a new normal?

## Recovery rates in Europe compared to 2017/19 attendance averages

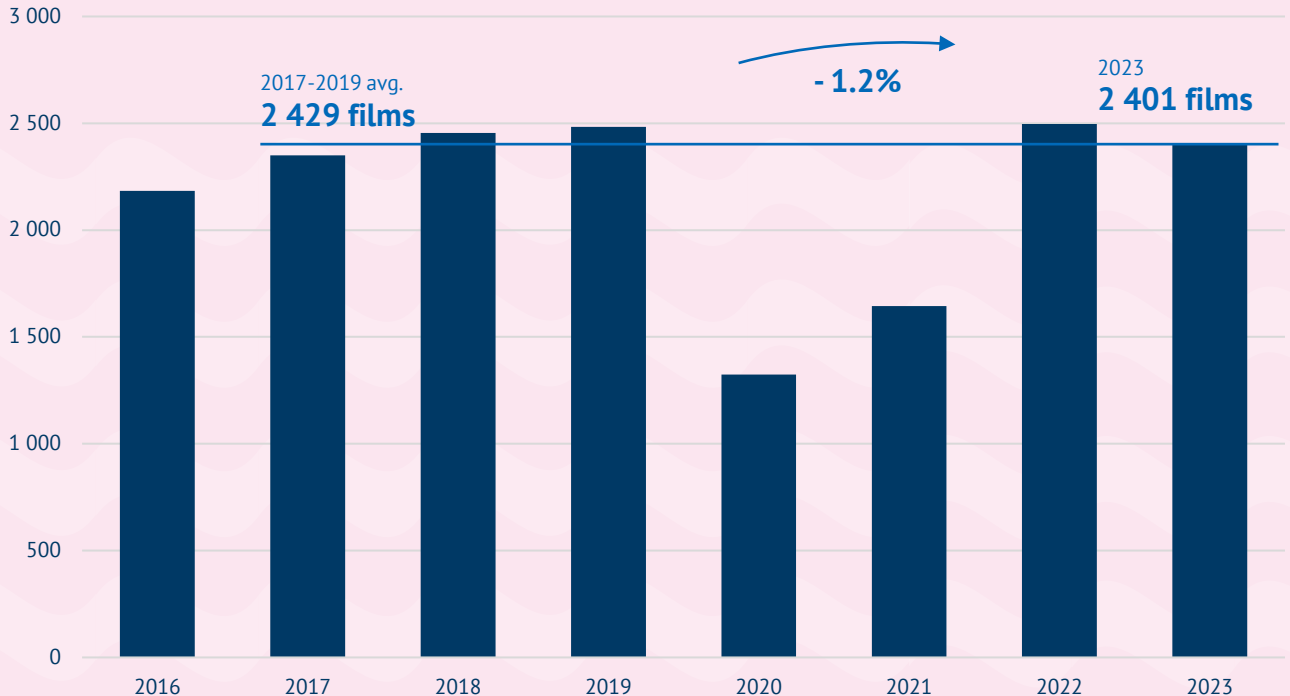


**New releases**

# New releases are back to pre-pandemic levels

## Number of new releases in Europe

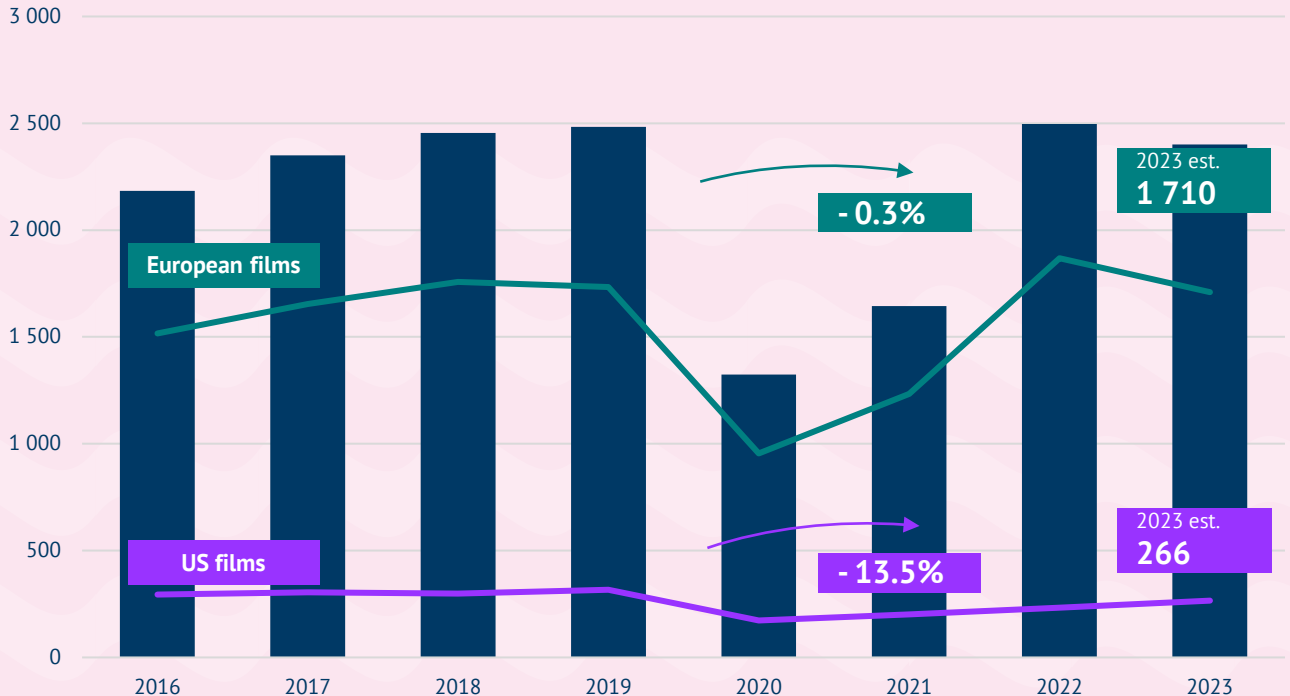
Number of films with more than 1 000 admissions. Estimated. 2016-2023



# ...but US releases are still trailing

## Number of new releases in Europe

Number of films with more than 1 000 admissions. Estimated. 2016-2023





# Top titles and market shares

# European charts are again dominated by Hollywood titles...

## Top 20 films in Europe Based on data from 32 European markets. 2023

	Original title	Country of origin	Admissions
1	Barbie	US, GB	49.3 m.
2	The Super Mario Bros. Movie	US, JP	36.1 m.
3	Oppenheimer	US, GB	35.1 m.
4	Avatar: The Way of Water	US	34.4 m.
5	Guardians of the Galaxy Vol. 3	US	17.1 m.
6	Elemental	US	15.9 m.
7	Puss in Boots: The Last Wish	US	14.4 m.
8	Fast X	US	14.3 m.
9	Wonka	US, GB	14.1 m.
10	Indiana Jones and the Dial of Destiny	US	13.0 m.
11	Spider-Man: Across the Spider-Verse	US	12.9 m.
12	The Little Mermaid	US	12.8 m.
13	Mission: Impossible - Dead Reckoning Part One	US	12.3 m.
14	John Wick: Chapter 4	US, DE	10.0 m.
15	PAW Patrol: The Mighty Movie	US, CA	9.8 m.
16	Napoleon	US, GB	9.3 m.
17	Meg 2: The Trench	US, CN	9.3 m.
18	The Hunger Games: The Ballad of Songbirds & Snakes	US, CA	9.0 m.
19	Ant-Man and the Wasp: Quantumania	US	8.6 m.
20	Creed III	US	8.6 m.



# ...while France and Italy share the European Top 5

## Top 20 European films in Europe

Based on data from 32 European markets. 2023

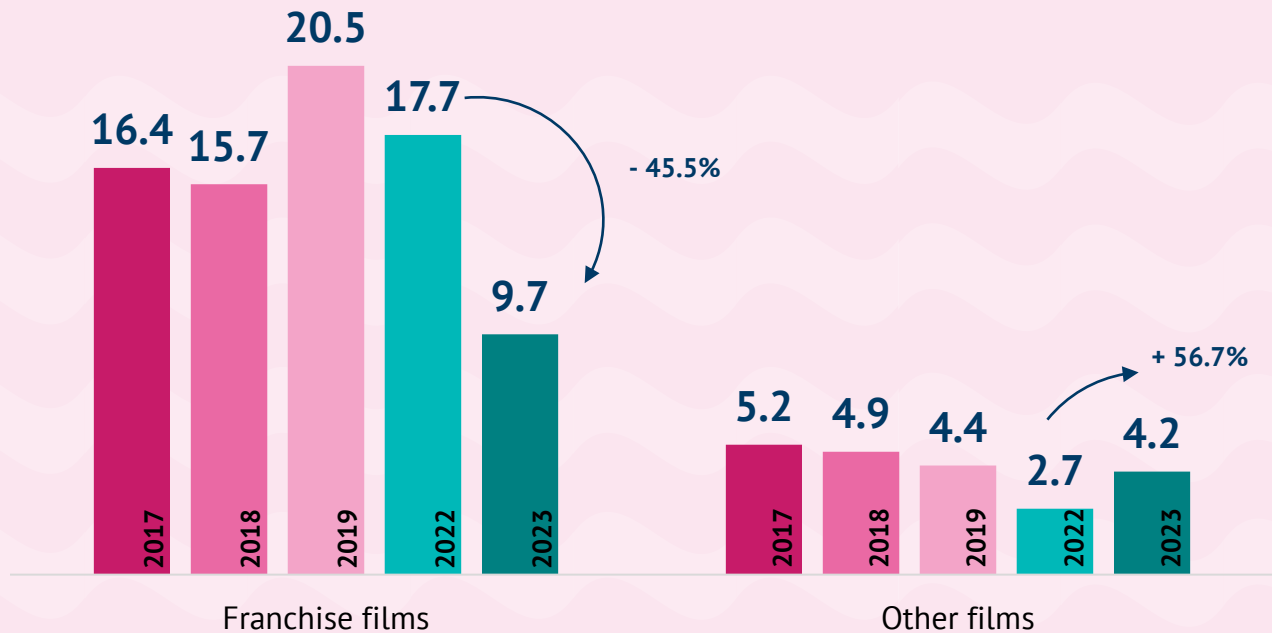
	Original title	Country of origin	Admissions
1	Astérix & Obélix: L'Empire du Millieu	FR	6.4 m.
2	C'è ancora domani	IT	4.9 m.
3	Alibi.com 2	FR	4.5 m.
4	Les trois mousquetaires: D'Artagnan	FR	4.0 m.
5	Miraculous: Le Film	FR	3.9 m.
6	Rafadan Tayfa Galaktik Tayfa	TR	2.8 m.
7	Anatomie d'une chute	FR	2.4 m.
8	3 jours max	FR	2.0 m.
9	Campeonex	ES	1.9 m.
10	Chłopi	PL, RS, LT	1.9 m.
11	Rehragout-Rendezvous	DE	1.9 m.
12	Die drei ??? - Erbe des Drachen	DE	1.8 m.
13	Pattie et la colère de Poséidon	FR	1.7 m.
14	Atatürk 1881 - 1919	TR	1.7 m.
15	Mavka. Lisova pisnya	UA	1.7 m.
16	Mon crime	FR	1.5 m.
17	The Amazing Maurice	GB, DE	1.5 m.
18	Ölümlü Dünya 2	TR	1.5 m.
19	Manta, Manta - Zwoter Teil	DE	1.4 m.
20	Le otto montagne	IT, BE, FR	1.4 m.



# A shift in audience preferences?

## Average admissions to top 30 films in Europe

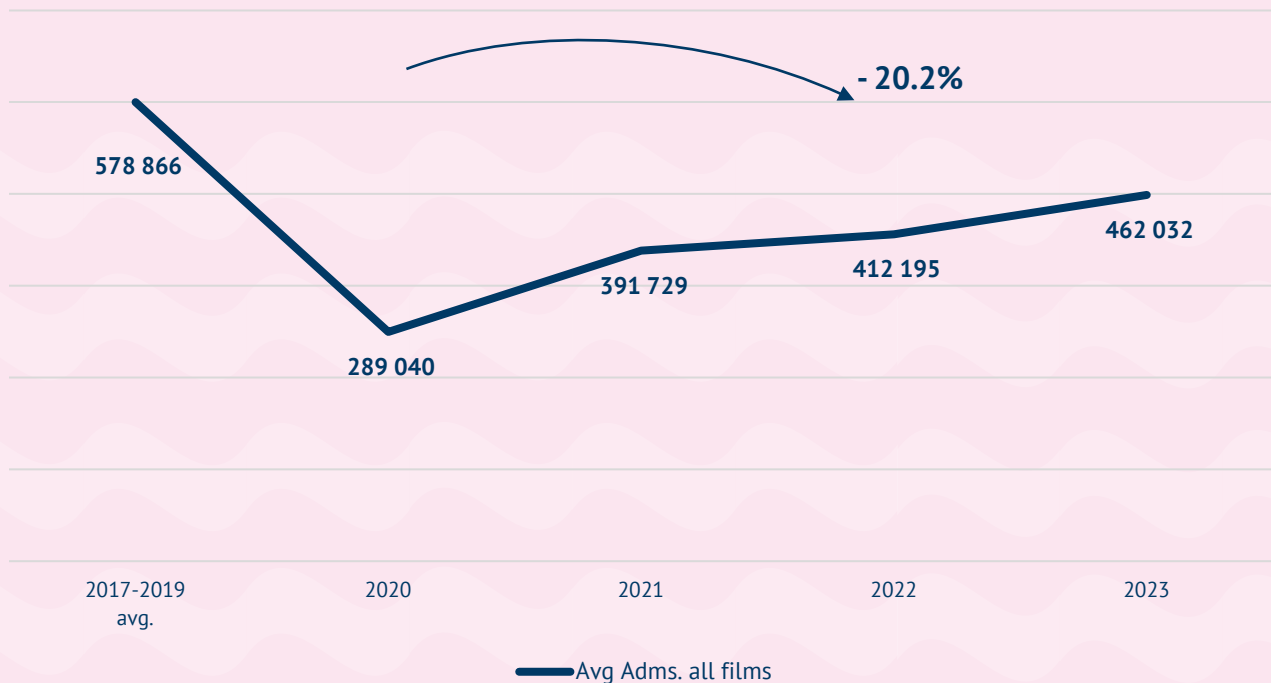
Estimated. 2027-2023



# Average admissions are still down by 20%...

## Average annual admissions

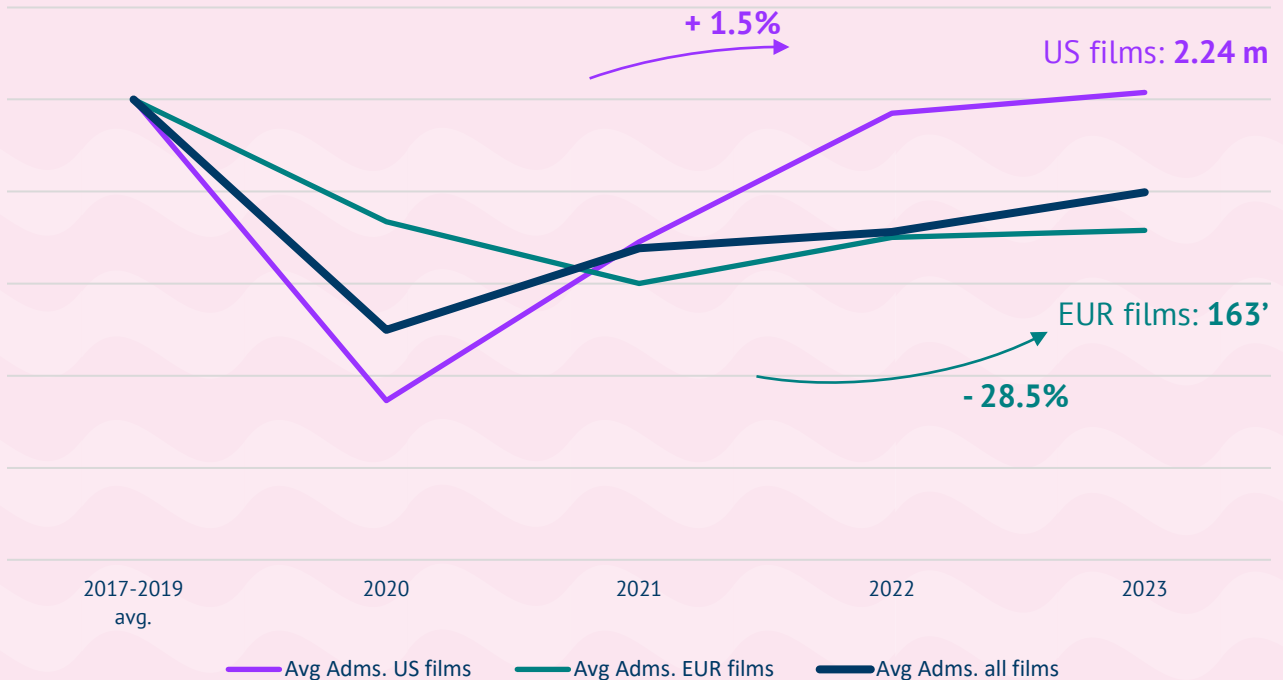
Indexed. Calculated only for films with more than 10 000 admissions. 2017-2023



# ...but US films are back to pre-pandemic averages

## Average annual admissions

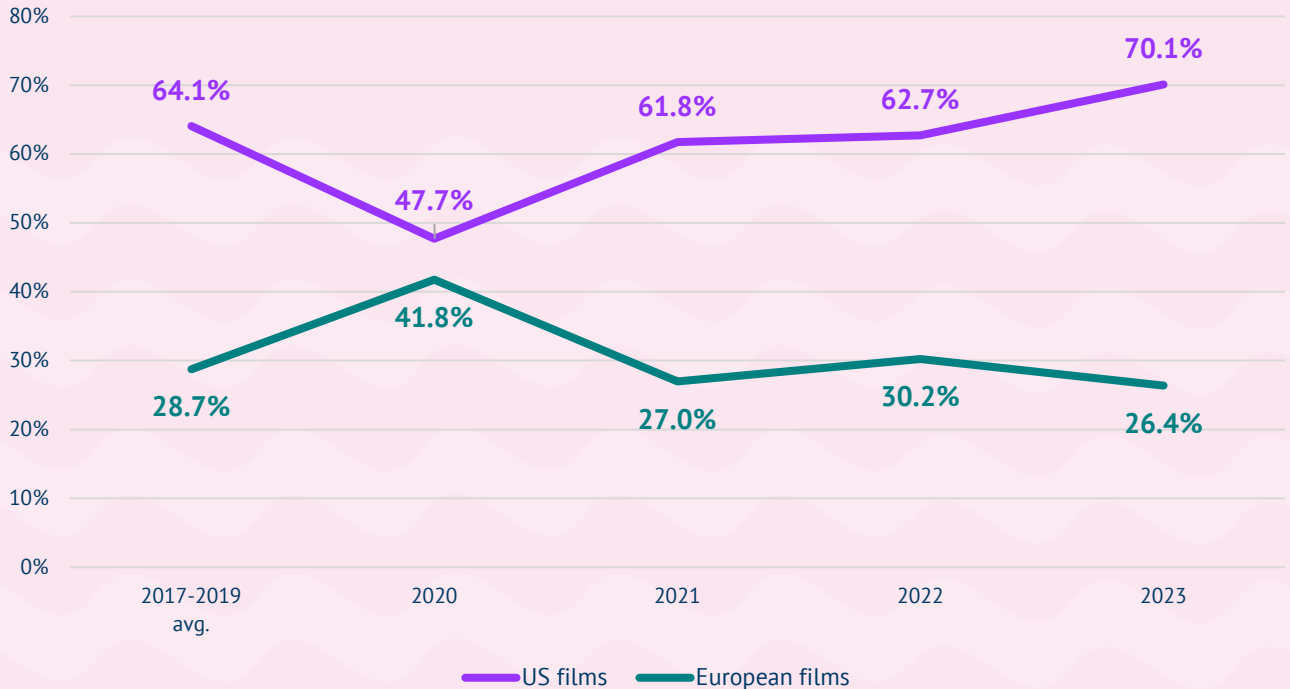
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# US films' market share reaches 70%

## Attendance breakdown by origin in Europe

Estimated. 2017-2023



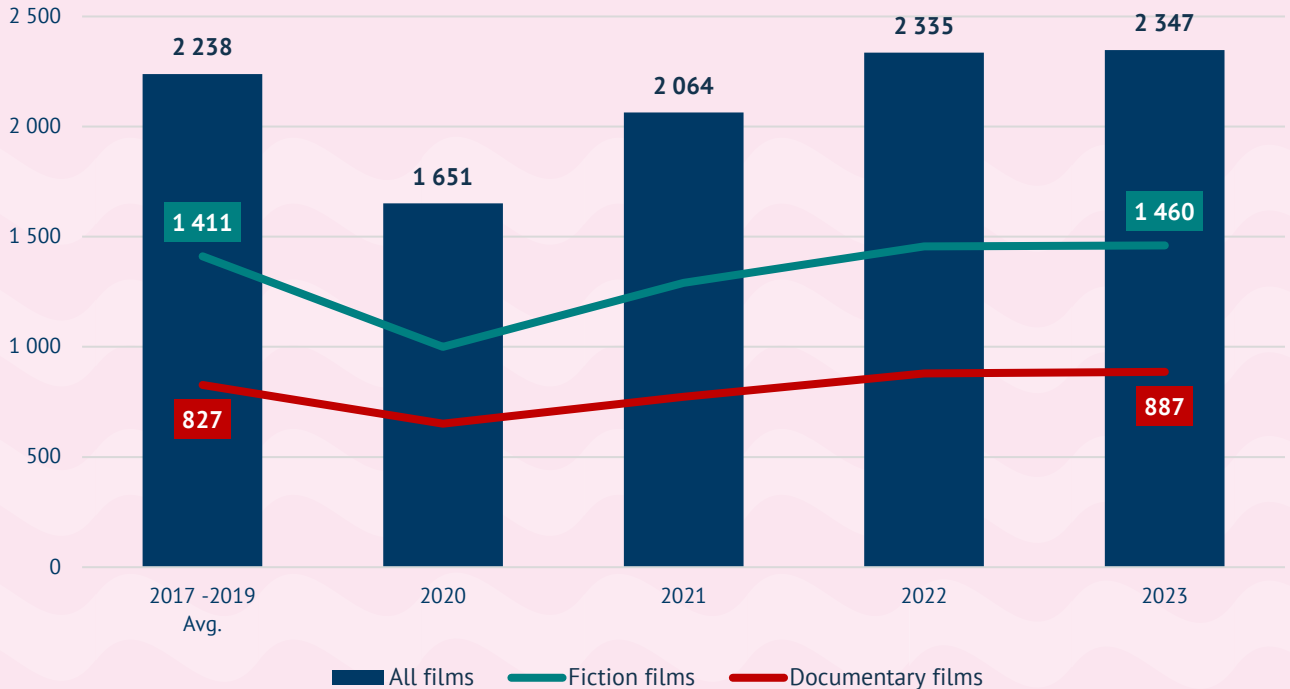
**Production**



# Film production remains stable, above pre-pandemic levels

## Number of feature films produced in Europe

Estimated. 2017-2023



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