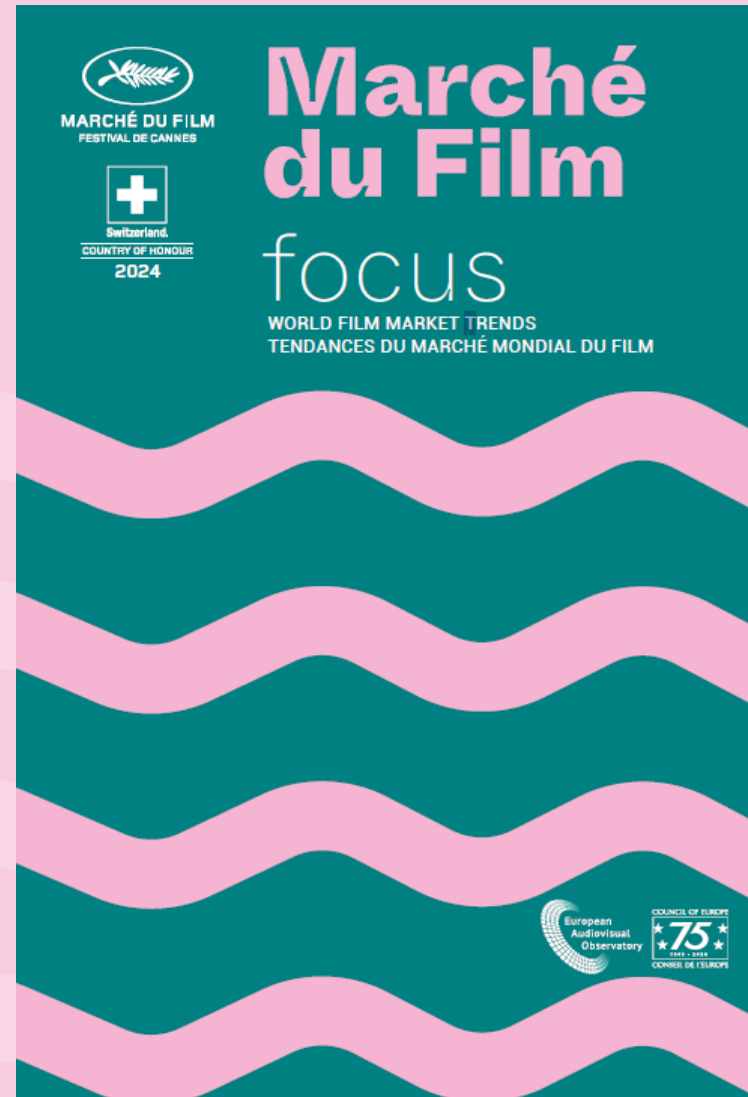


# FOCUS 2024

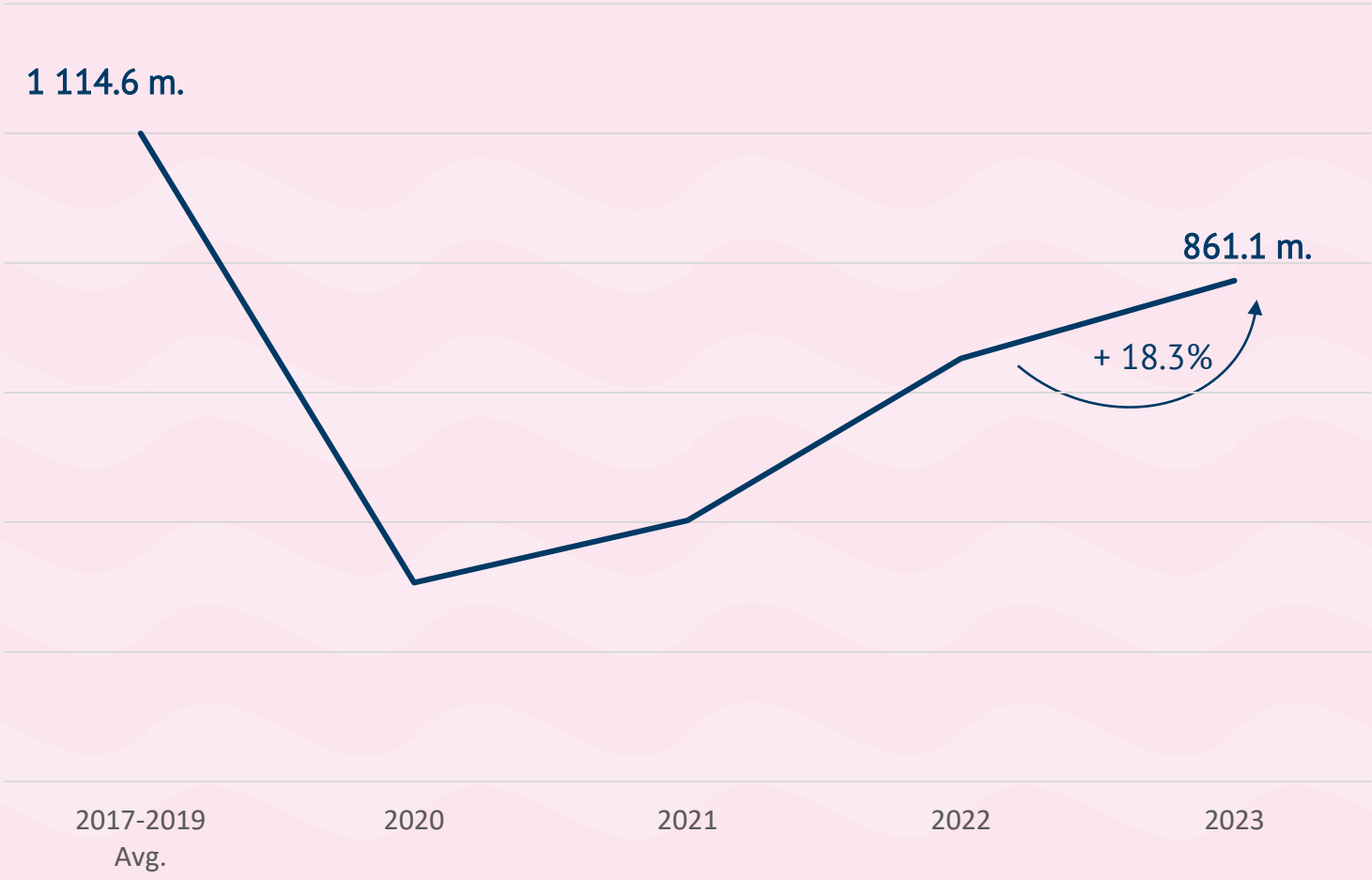
WORLD FILM MARKET TRENDS



**Box office**

# Cinema attendance grows to 861 million tickets ...

## Admissions in Europe 2017 - 2023



Recovery rates  
compared to 2017-2019 avg.



Europe: 77%

Source: European Audiovisual Observatory (EAO)

# ... Switzerland performing above average

## Admissions in Europe 2017 - 2023



Source: European Audiovisual Observatory (EAO)

## Recovery rates compared to 2017-2019 avg.



Europe: 77%



1. BA: 113%



10. AT: 85%



13. CH: 83%



19. NO: 78%



22. DK: 78%



35. TR: 46%

# ... while GBO reaches EUR 6.7 billion

## Admissions and GBO in Europe 2017 - 2023

GBO: EUR 7.6 bn.

GBO: EUR 6.7 bn.

+ 22.3%

+ 18.3%

2017-2019  
Avg.

2020

2021

2022

2023

— Admissions - Europe

— GBO - Europe

## Recovery rates - GBO

in nat. currencies, compared to 2017-2019 avg.



Europe: 88%



1. BA: 149%



12. AT: 99%



20. NO: 93%



23. CH: 89%



24. DK: 89%

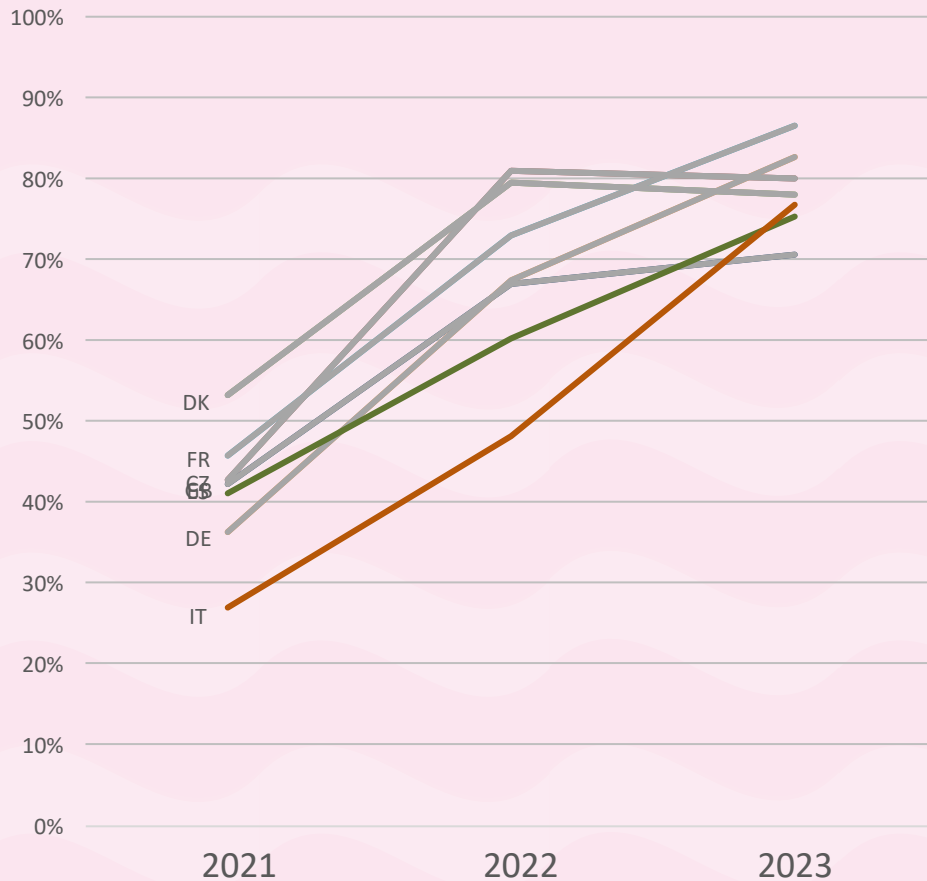


32. GB: 77%

**A new normal?**

# 1 | Recovery rates seem to be converging in mature markets

Recovery rates in selected markets 2021-2023



Source: European Audiovisual Observatory (EAO)

Avg 2023 growth rates

Markets with a recovery rate of >75% in 2022:

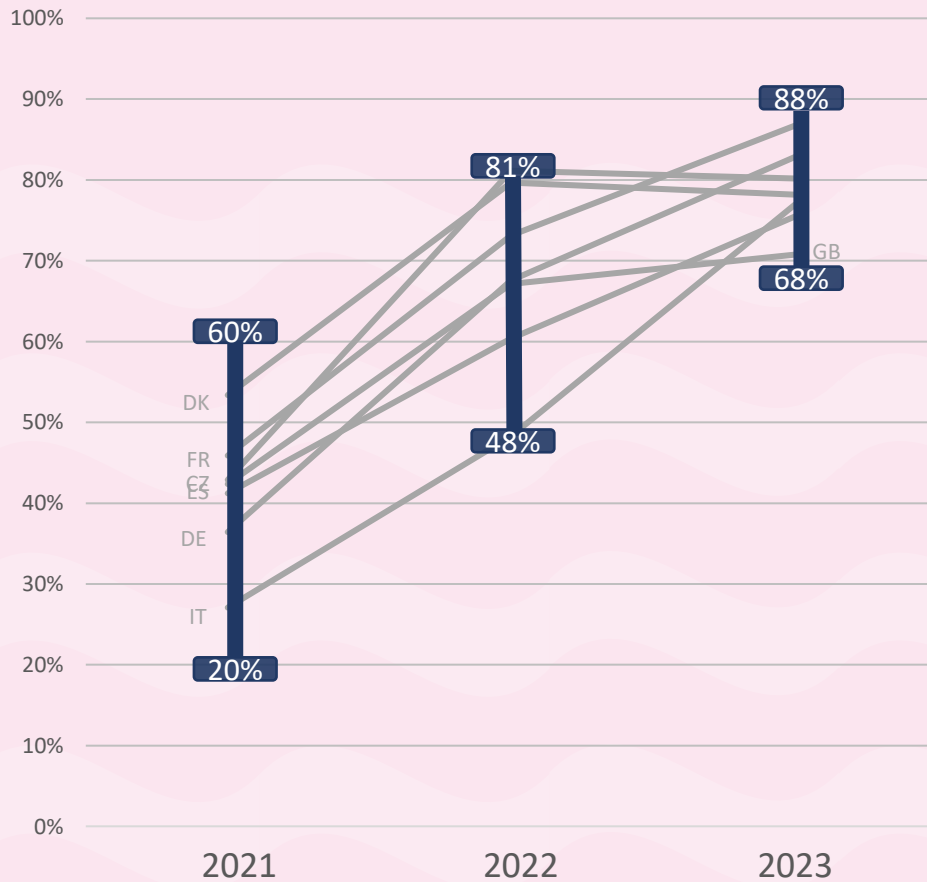
2%

Markets with a recovery rate of <75% in 2022:

21%

# 1 | Recovery rates seem to be converging in mature markets

Recovery rates in selected markets 2021-2023



Source: European Audiovisual Observatory (EAO)

## Avg 2023 growth rates

Markets with a recovery rate of >75% in 2022:

2%

Markets with a recovery rate of <75% in 2022:

21%



# 2 | 2024 may turn out to be a particularly challenging year

## Growth in Q1

Country	RR 2023	Growth Q1 '24
FI	85%	20%
LT	83%	15%
GB	71%	11%
SK	78%	10%
IT	77%	10%

## Decline in Q1

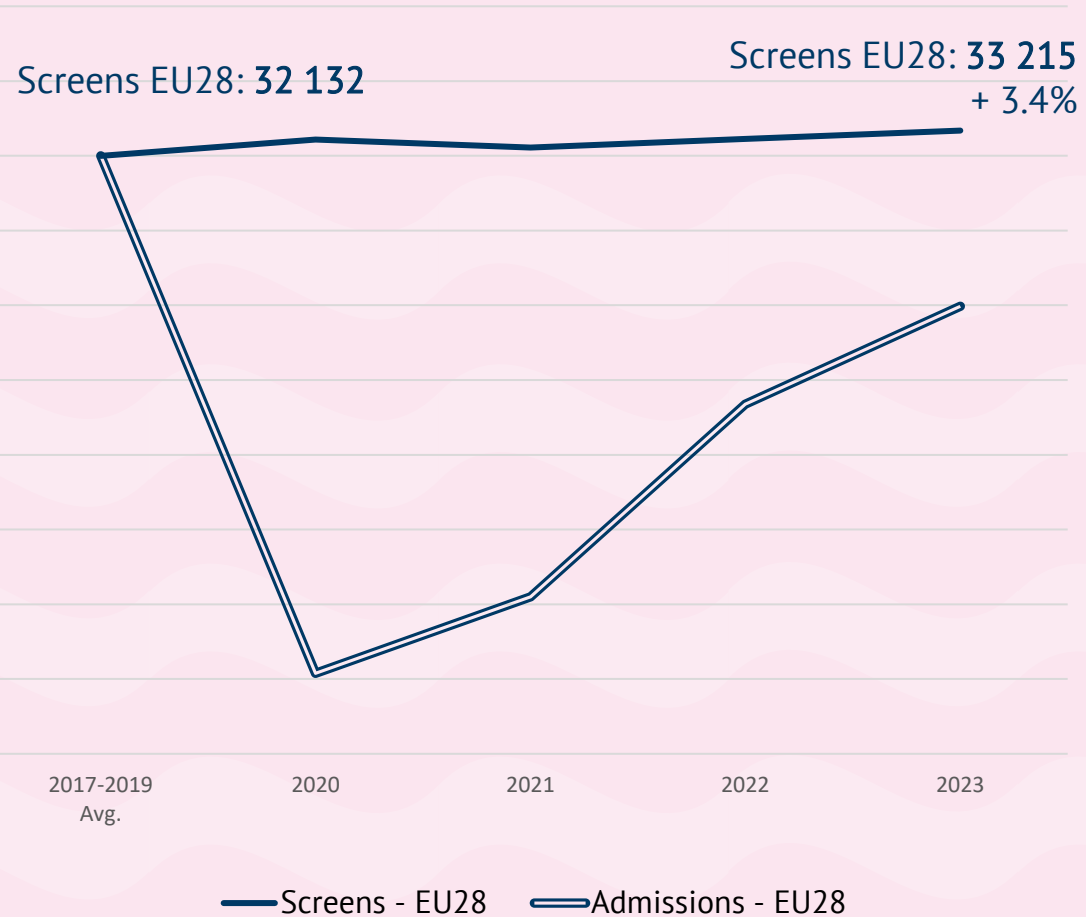
Country	RR 2023	Growth Q1 '24
DK	78%	0%
PT	63%	-1%
DE	68%	-1%
CH	83%	-7%
LV	79%	-10%
BE	87%	-15%
FR	87%	-17%
EE	78%	-20%
ES	75%	-20%
BG	86%	-23%

- US strike actions
- Major int. sports events
- Lasting changes in consumer behaviour
- Lower appetite for franchise film
- Political instability
- Extreme weather

# Theatrical infrastructure

# The number of European screens is stable ...

## Number of screens in EU28 2017 - 2023



# ... with differences in terms of screen density

## Number of screens in EU28 and CH 2017 - 2023

Screens EU28: 32 132

Screens CH: 597

Screens EU28: 33 215

+ 3.4%

Screens CH: 616

+ 3.2%

2017-2019  
Avg.

2020

2021

2022

2023

— Screens - EU28

— Admissions - EU28

— Screens - Switzerland

— Admissions - Switzerland

## Number of screens per 100 000 inhabitants - 2023



Europe: 6.0 (2022)



1. IS: 11.3



5. NO: 8.7



6. DK: 8.2



9. CH: 7.0



13. AT: 6.2



38. AM: 1.0

# ... as well as structure

## Number of screens in EU28 and CH 2017 - 2023

Screens EU28: 32 132

Screens CH: 597

Screens EU28: 33 215

+ 3.4%

Screens CH: 616

+ 3.2%

2017-2019  
Avg.

2020

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— Screens - EU28

— Admissions - EU28

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## Number of screens per 100 000 inhabitants - 2023



Europe: 6.0 (2022)



1. IS: 11.3



5. NO: 8.7



6. DK: 8.2



9. CH: 7.0



13. AT: 6.2



38. AM: 1.0

## Screens per site on average - 2022



Europe: 3.2



1. IE: 6.9



11. AT: 4.1



19. DK: 2.9



27. NO: 2.4



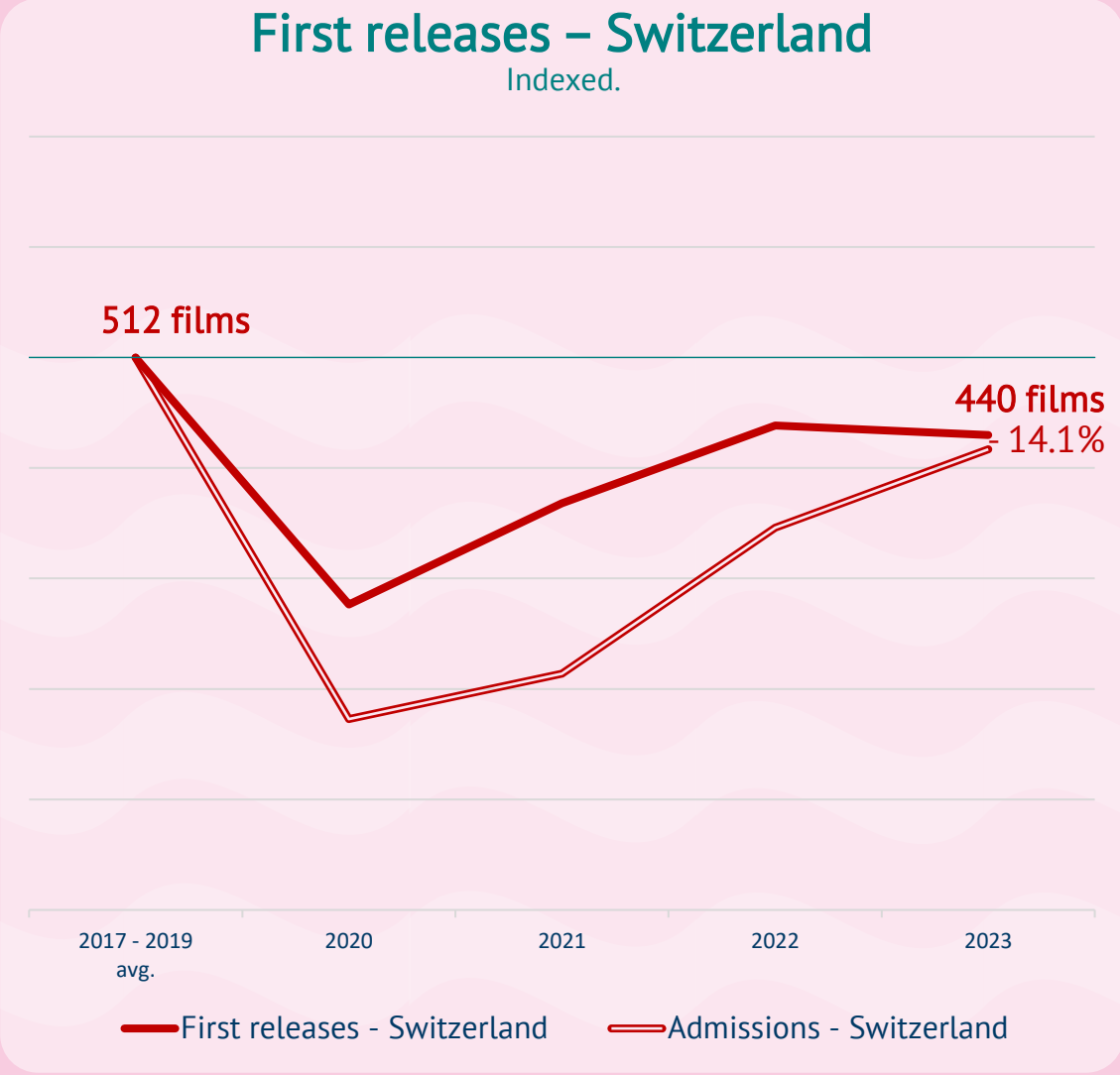
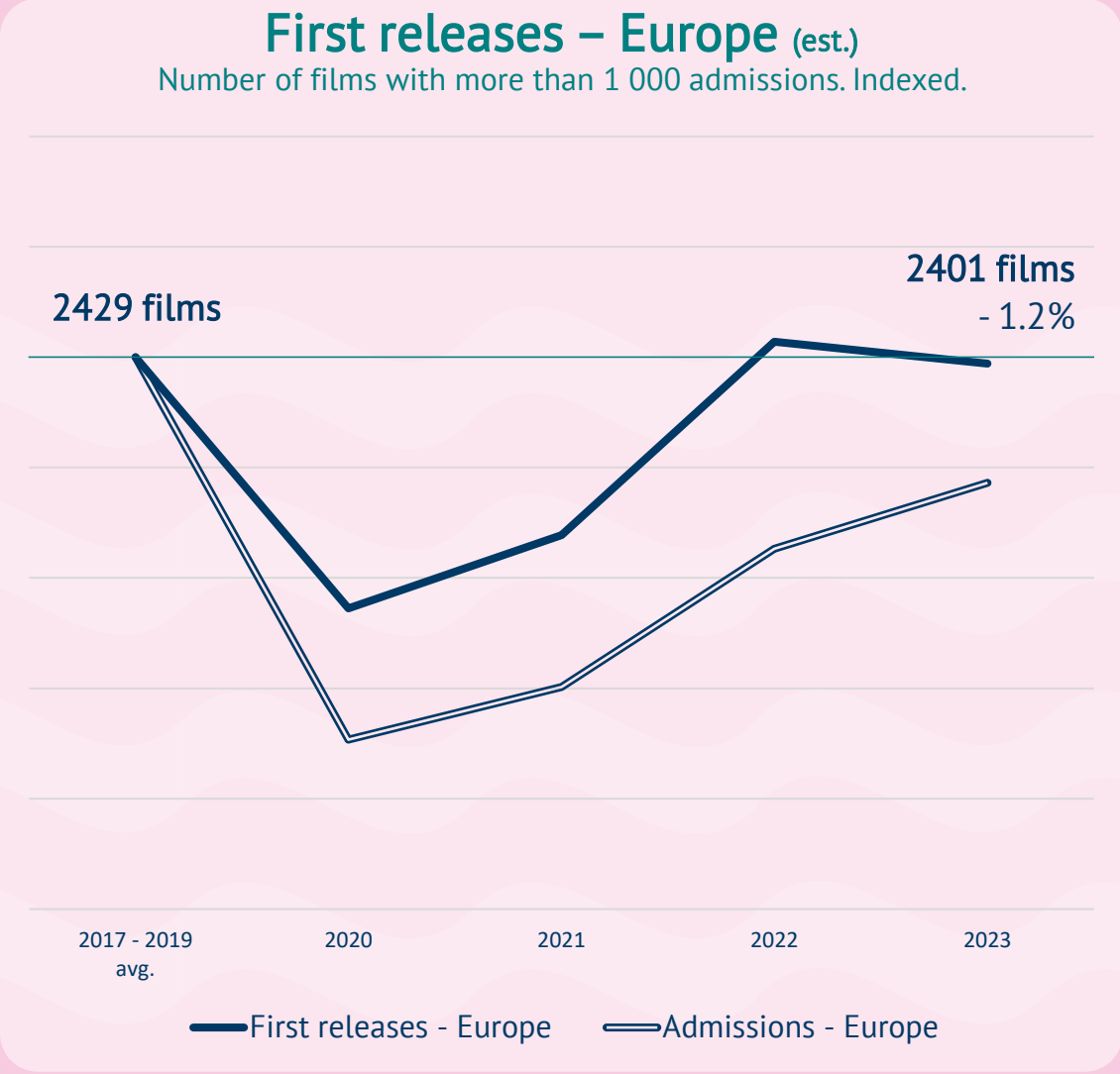
28. CH: 2.4



38. CZ: 1.4

# First releases

# New releases are back to pre-pandemic highs...

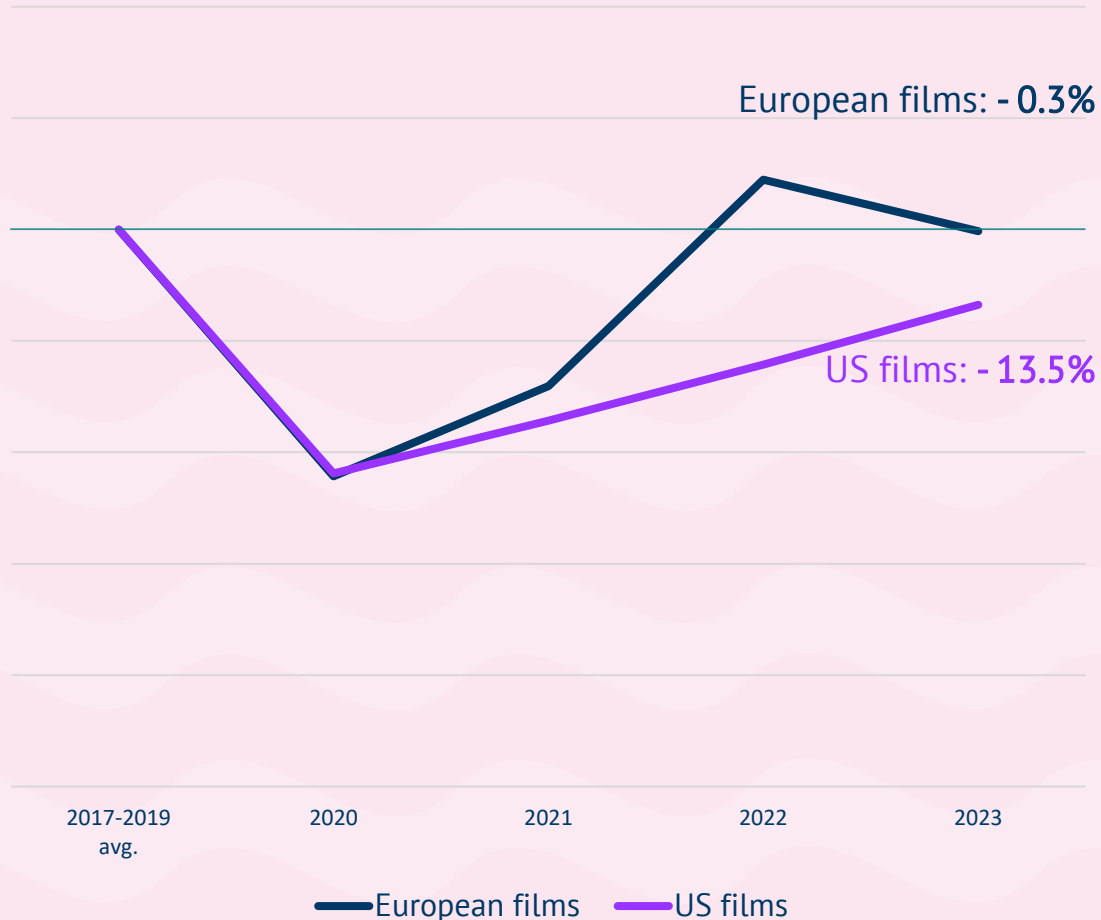


Source: European Audiovisual Observatory (EAO), Swiss Federal Statistical Office

# ...but US films are still trailing

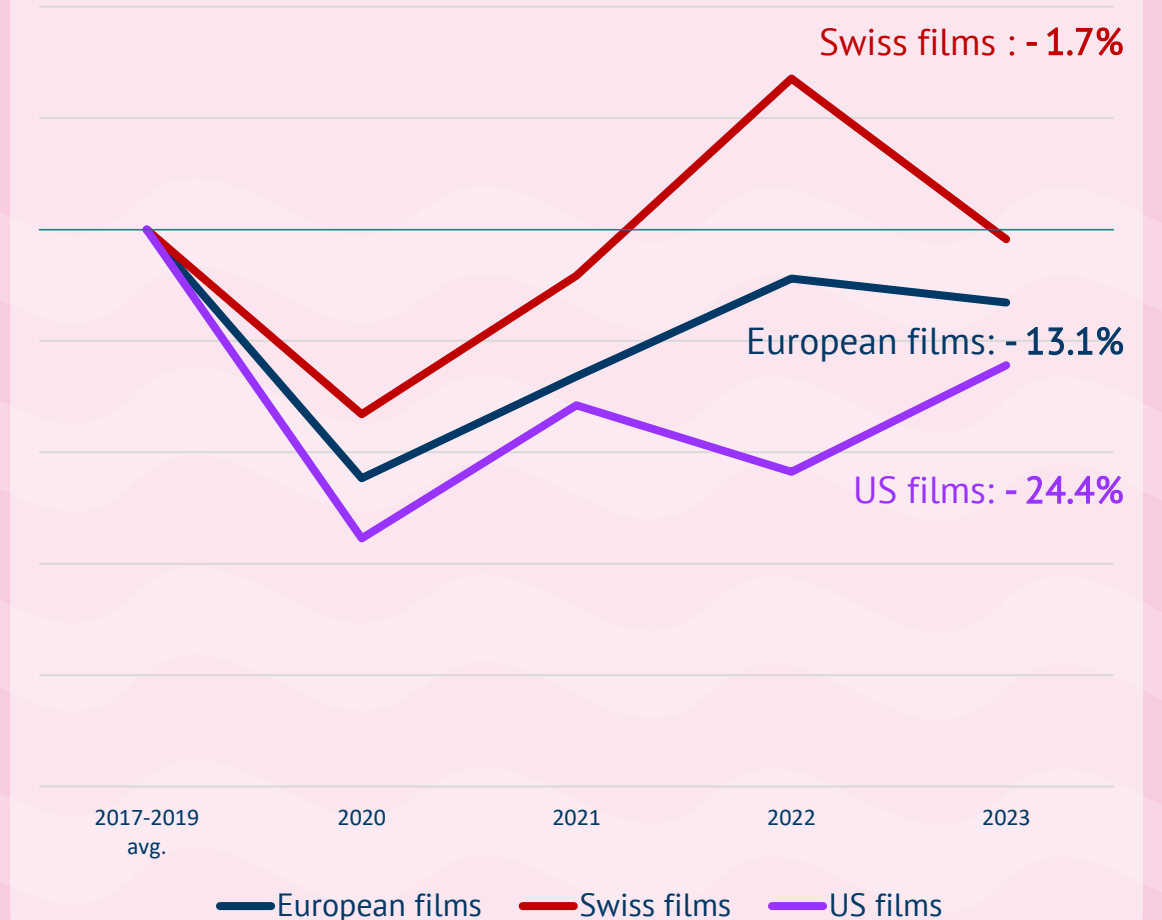
## First releases – Europe (est.)

Number of films with more than 1 000 admissions. Indexed.



## First releases – Switzerland

Indexed.





# Top films & market shares

# European charts are again dominated by US studio titles

## Top 20 films in Europe - 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.



# European charts are again dominated by US studio titles

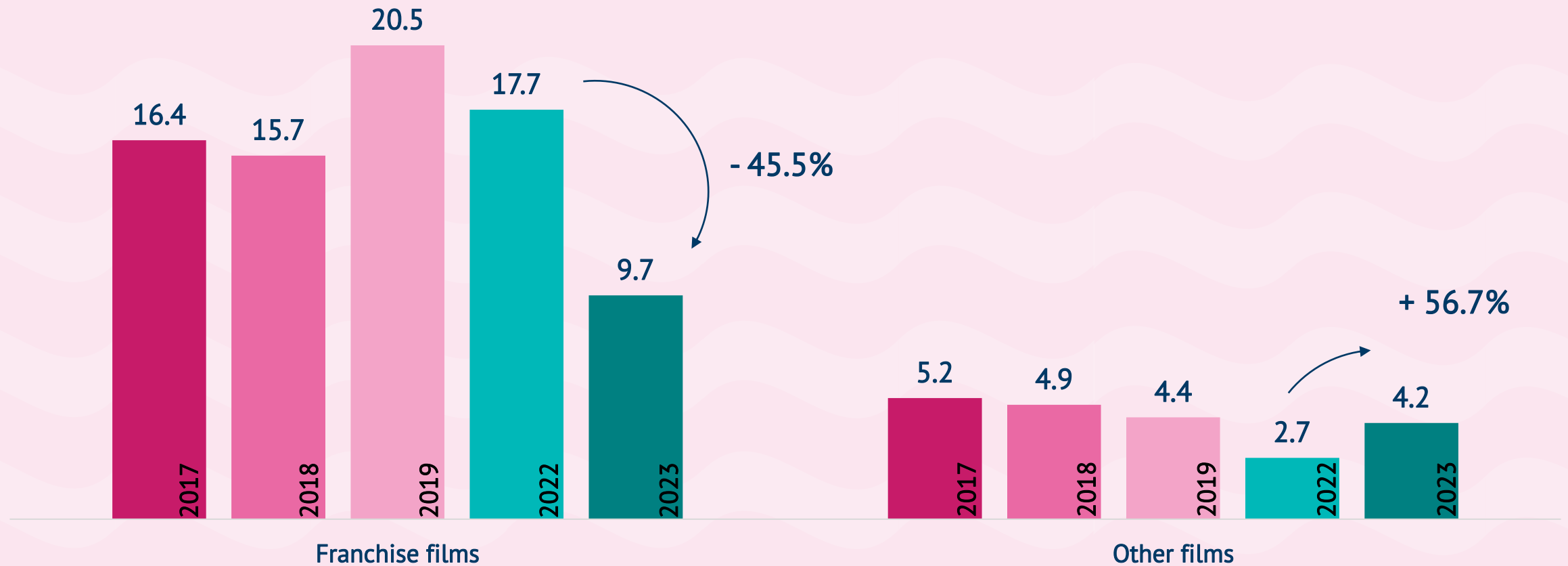
## Top 20 films in Switzerland - 2023

	Original title	Country of origin	Admissions
1	Barbie	US, GB	704 906
2	Avatar: The Way of Water	US	633 747
3	The Super Mario Bros. Movie	US, JP	571 432
4	Oppenheimer	US, GB	510 623
5	Fast X	US	213 903
6	Mission: Impossible - Dead Reckoning Part One	US	199 265
7	Puss In Boots: The Last Wish	US	196 746
8	Elemental	US	189 074
9	John Wick: Chapter 4	US, DE	183 157
10	Guardians of the Galaxy Vol. 3	US	176 752
11	Creed III	US	172 595
12	Indiana Jones and the Dial of Destiny	US	159 939
13	Astérix et Obélix: L'Empire du milieu	FR	134 894
14	Napoleon	US, GB	122 684
15	The Hunger Games: The Ballad of Songbirds & Snakes	US, CA	120 698
16	Meg 2: The Trench	US, CN	112 256
17	Killers of the Flower Moon	US	111 768
18	PAW Patrol: The Mighty Movie	US, CA	111 131
19	Wonka	US, GB	110 741
20	Die Drei ??? - Erbe des Drachen	DE	110 428



# A shift in audience preferences?

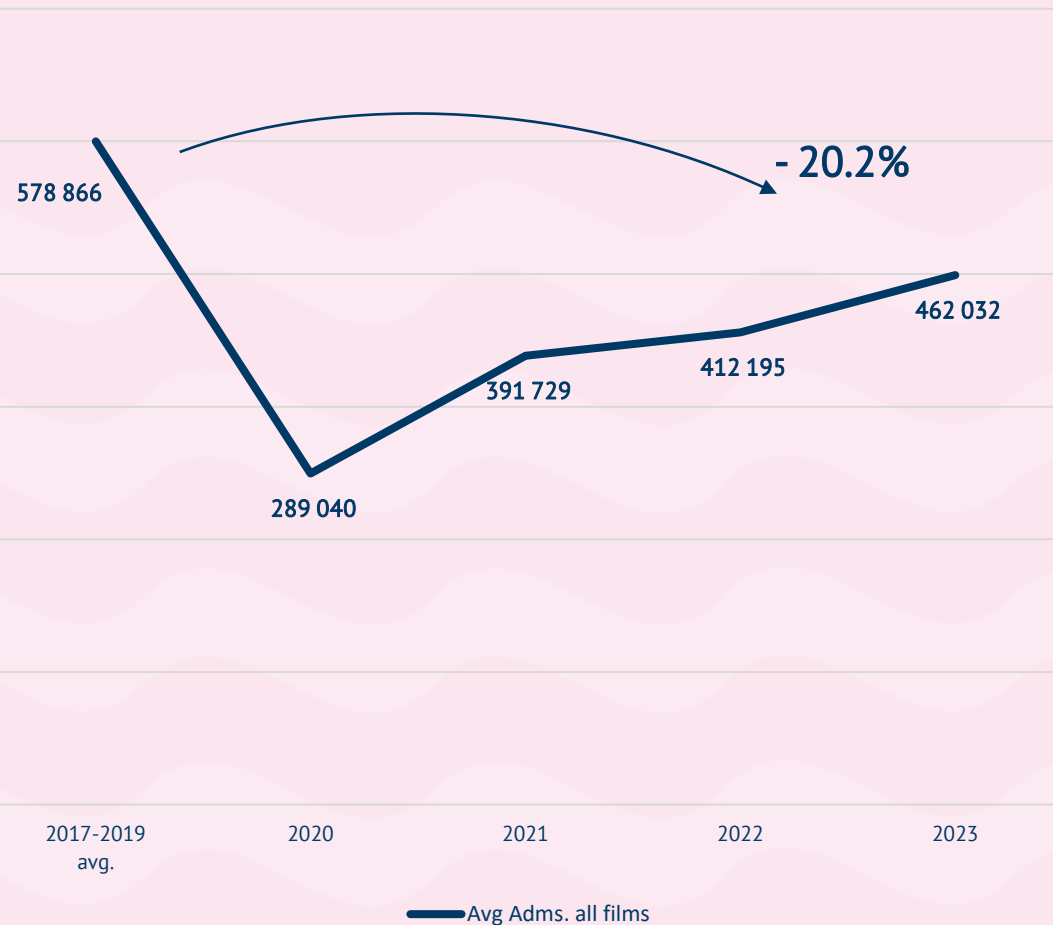
Avg. Admissions to top 30 films in Europe 2017 – 2023 (est.)



# Average admissions of US films are back to pre-pandemic levels

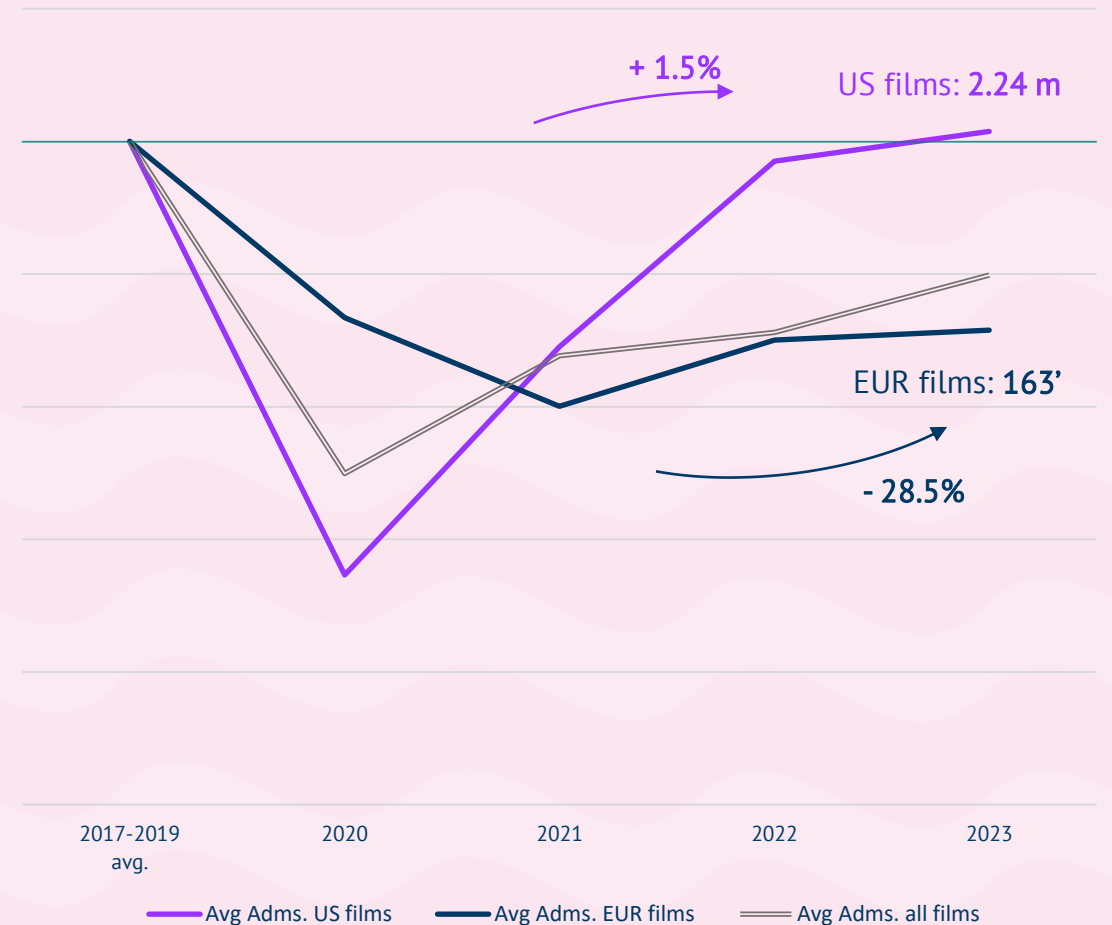
## Avg. annual admissions

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



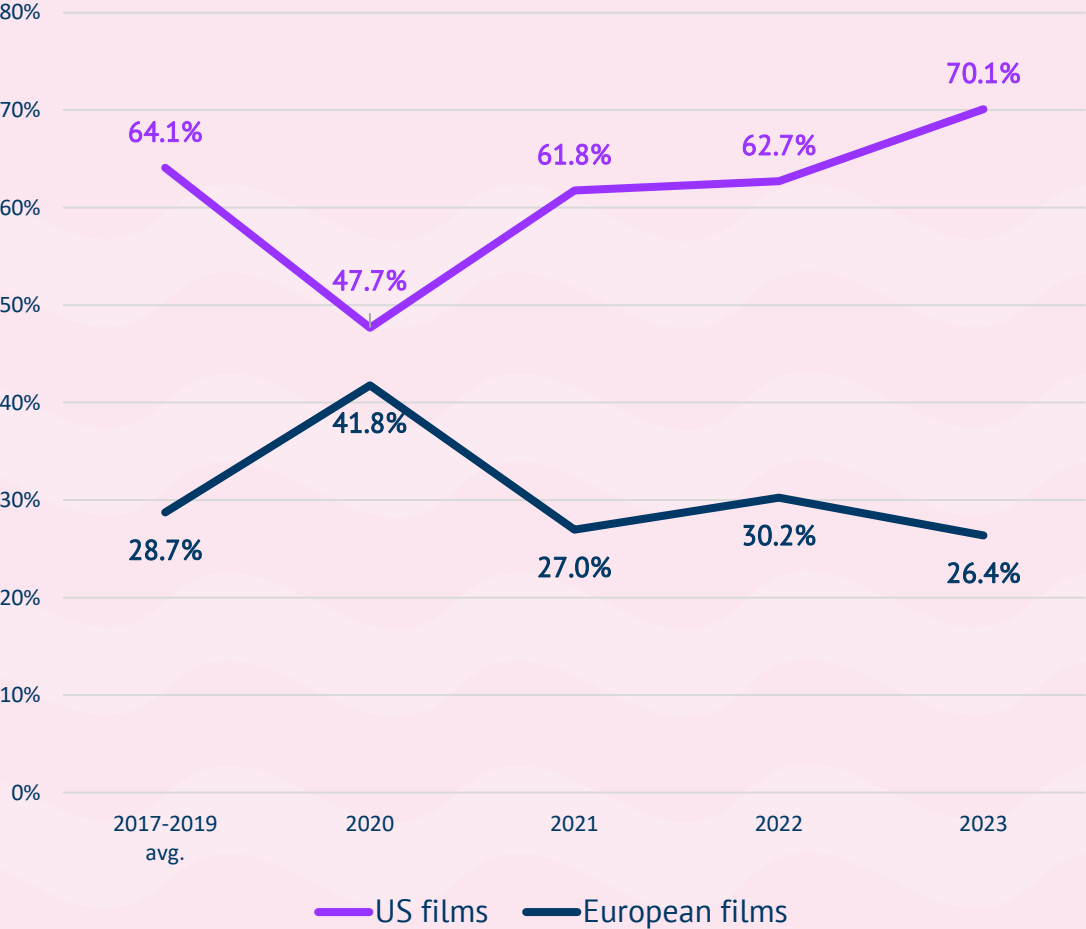
## Avg. annual admissions of US and European films

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

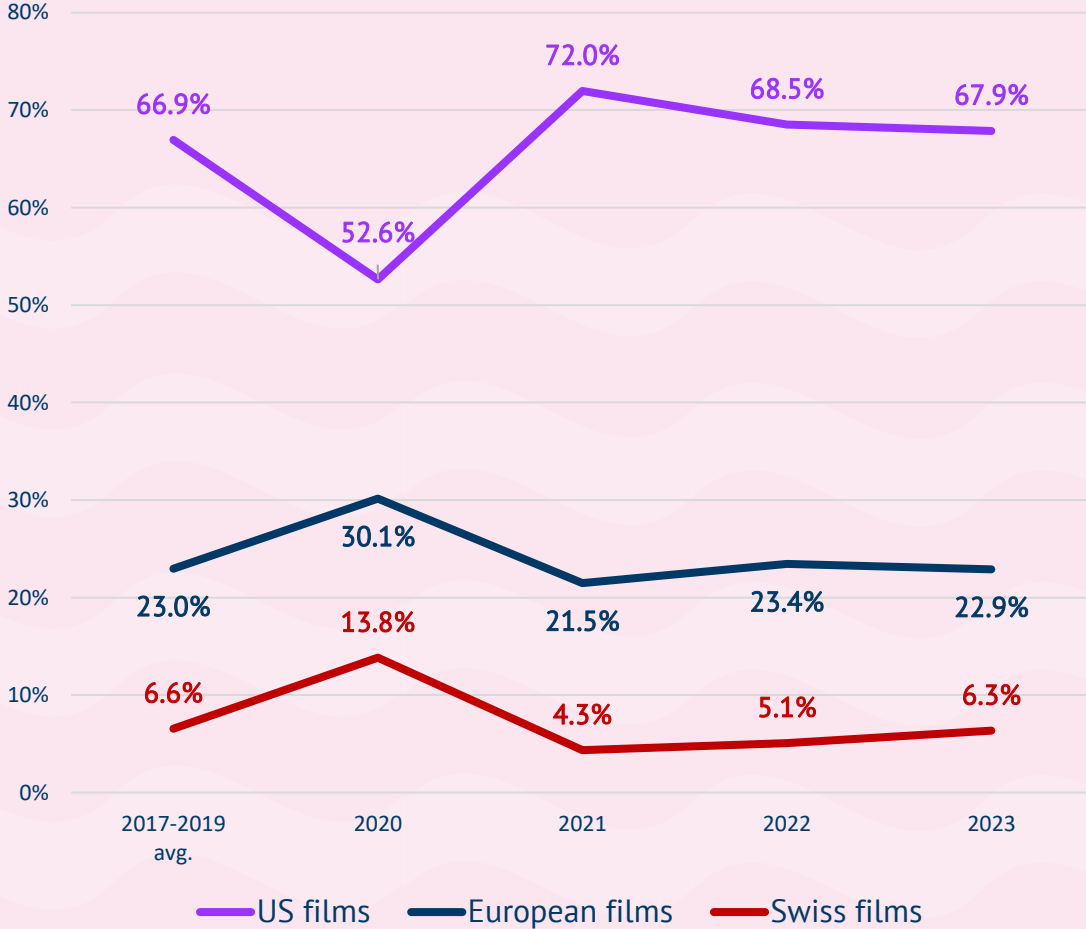


# US films' market share reaches 70%

### Admissions breakdown by origin – Europe



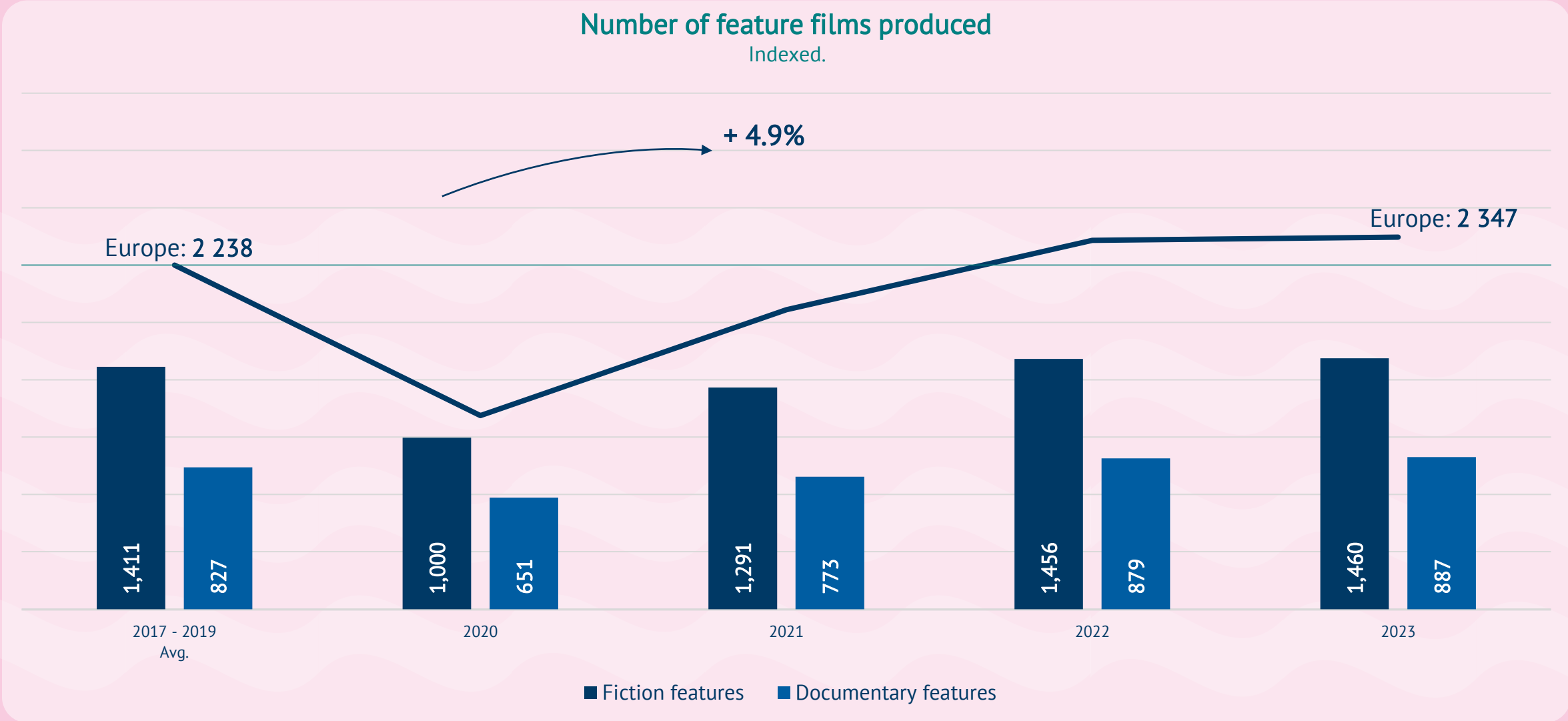
### Admissions breakdown by origin – Switzerland



Source: European Audiovisual Observatory (EAO), Swiss Federal Statistical Office

# Film production

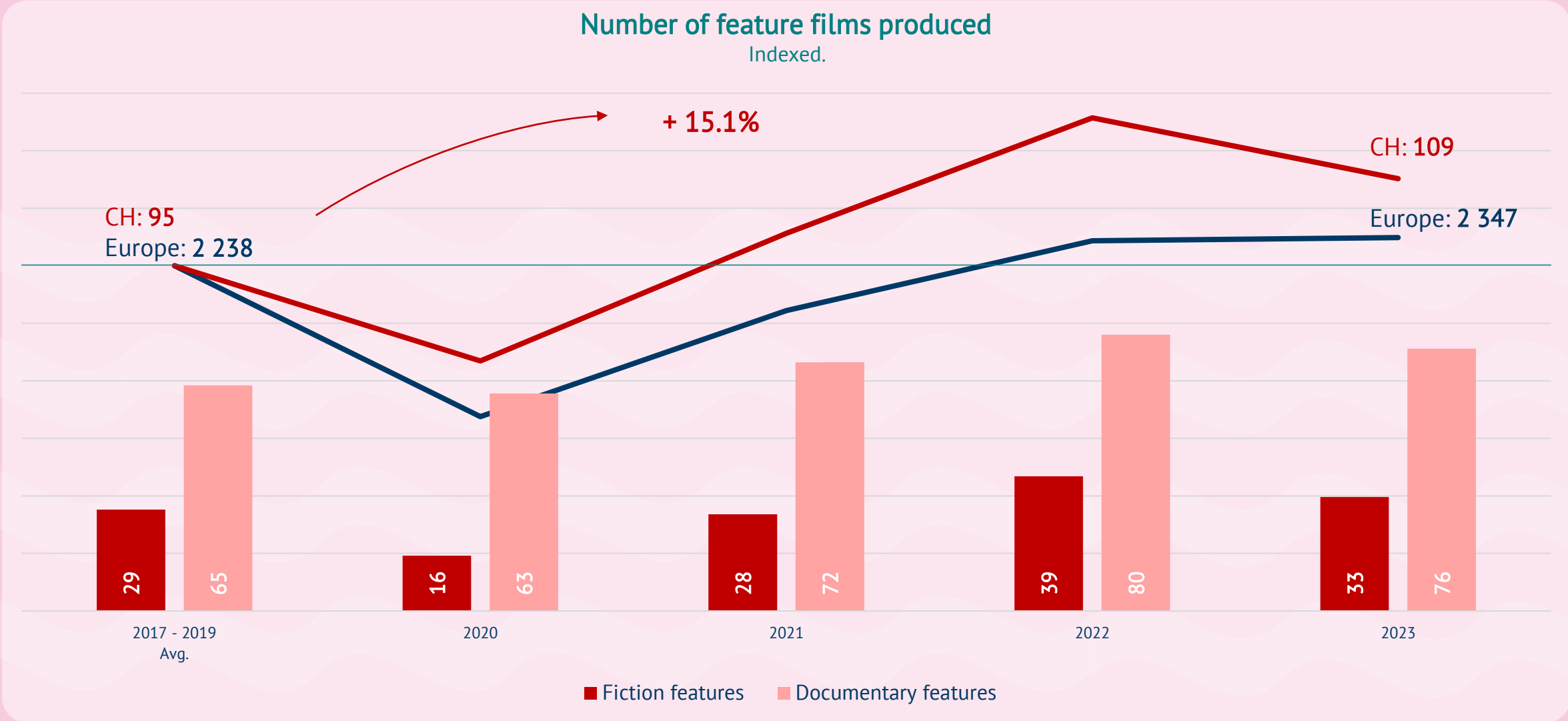
# Film production remains stable, above pre-pandemic levels



Source: European Audiovisual Observatory (EAO)



# Film production remains stable, above pre-pandemic levels



Source: European Audiovisual Observatory (EAO), Swiss Federal Statistical Office

# Film policy

# Film policies in Switzerland

- Production incentives
- Role of co-productions
- Sustainability in the industry
- “Lex Netflix”: a new investment law

# FOCUS 2024

WORLD FILM MARKET TRENDS

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