



# Theatrical distribution and exhibition in Europe

*Status quo & outlook*

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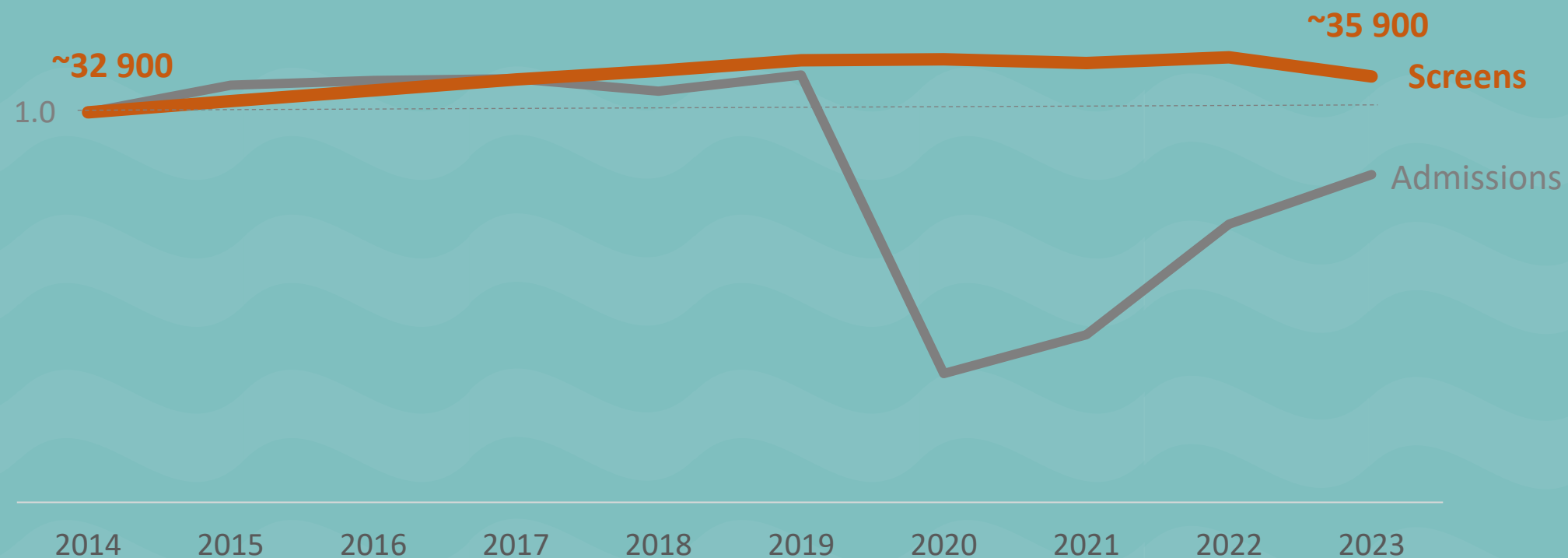
# Theatrical infrastructure

# European screens are there (and have always been)



## Cinema screens in Europe (est)

Indexed development



Source: European Audiovisual Observatory (EAO)

# Of course, differences in screen density

Screens per 100' inhabitants (est)

1	IS	11,3
2	IE	10,6
3	FR	9,3
...		
14	IT	6,0
	Europe	6,0
15	NL	5,9
...		
34	BA	2,0
35	ME	1,9
36	MK	1,5

*Mature markets*

*Growth potential*

Source: European Audiovisual Observatory (EAO)

# Of course, differences in screen density & structure

More multiplexes

More monoscreens

Avg screens per site (est)

1	IE	6,9
2	BE	6,2
3	GE	5,7
...		
14	BA	3,2
	Europe	3,2
16	FR	3,1
...		
36	ME	1,7
37	GR	1,6
38	CZ	1,4

Source: European Audiovisual Observatory (EAO)



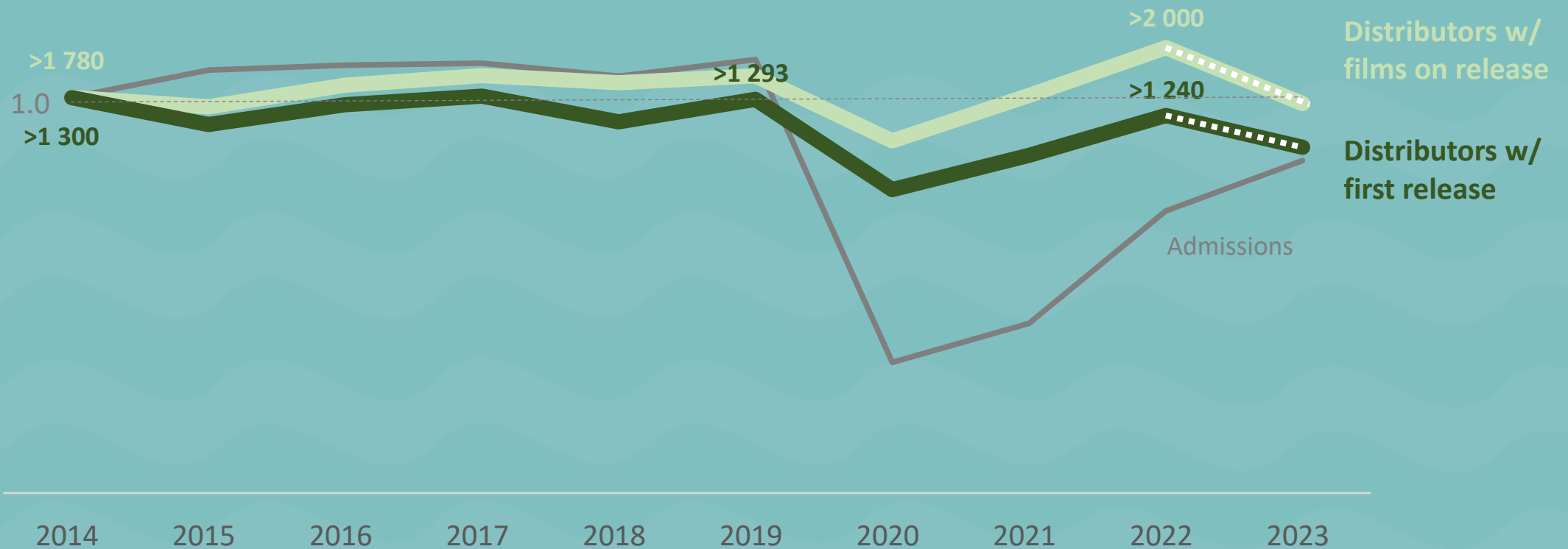
Europe ≠ Europe

**Distribution “infrastructure”**

# About 1 300 distributors active in Europe



Number of distributors in Europe (est)



Source: LUMIERE / European Audiovisual Observatory (EAO)

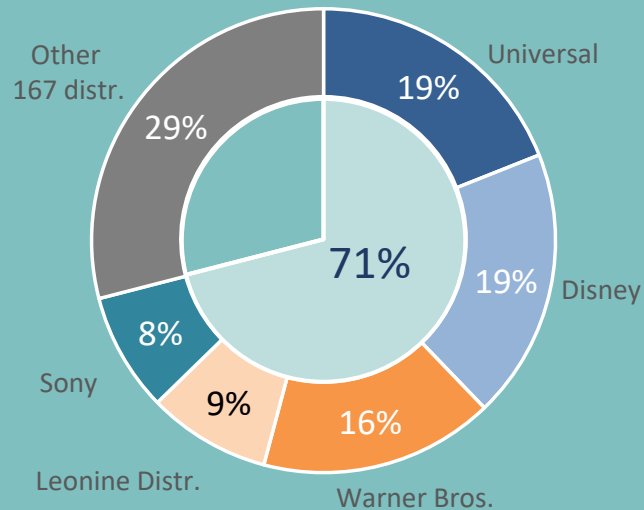


# Different realities linked to market size, but one thing shared ...



## Germany 2023 (est)

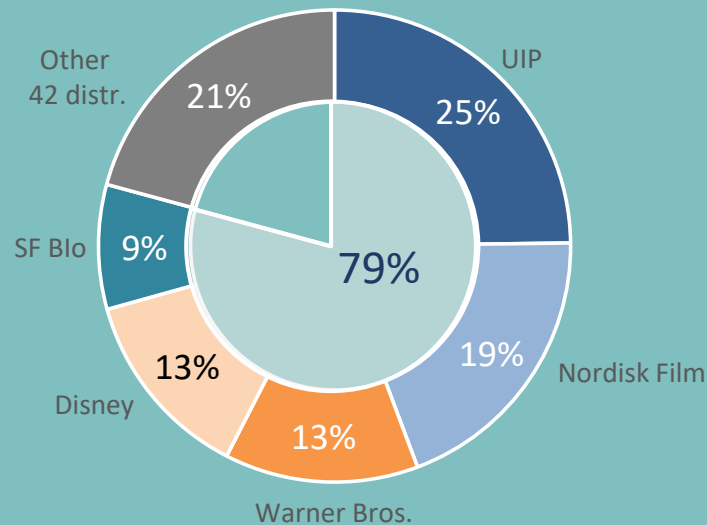
Admissions (mio)	95.7
Films on release	2 638
<b>Nr of distributors</b>	<b>~172</b>
<b>First releases</b>	<b>~560</b>



Source: LUMIERE / European Audiovisual Observatory (EAO)

## Norway 2023 (est)

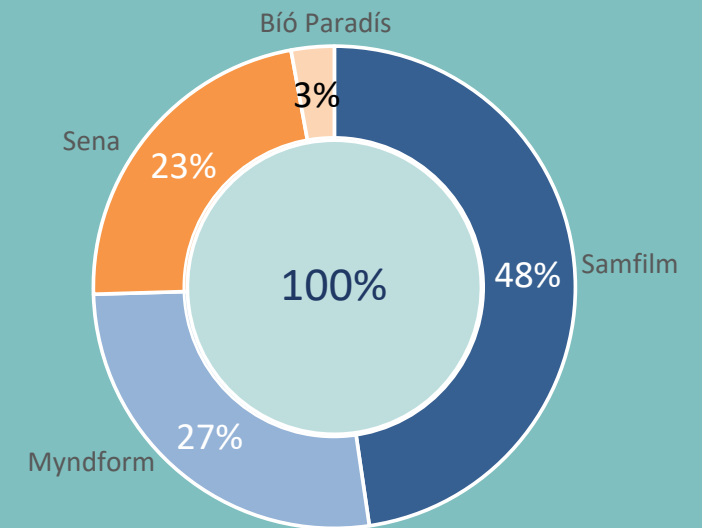
Admissions (mio)	9.4
Films on release	~ 600
<b>Nr of distributors</b>	<b>~47</b>
<b>First releases</b>	<b>~248</b>



Source: LUMIERE / European Audiovisual Observatory (EAO)

## Iceland 2023 (est)

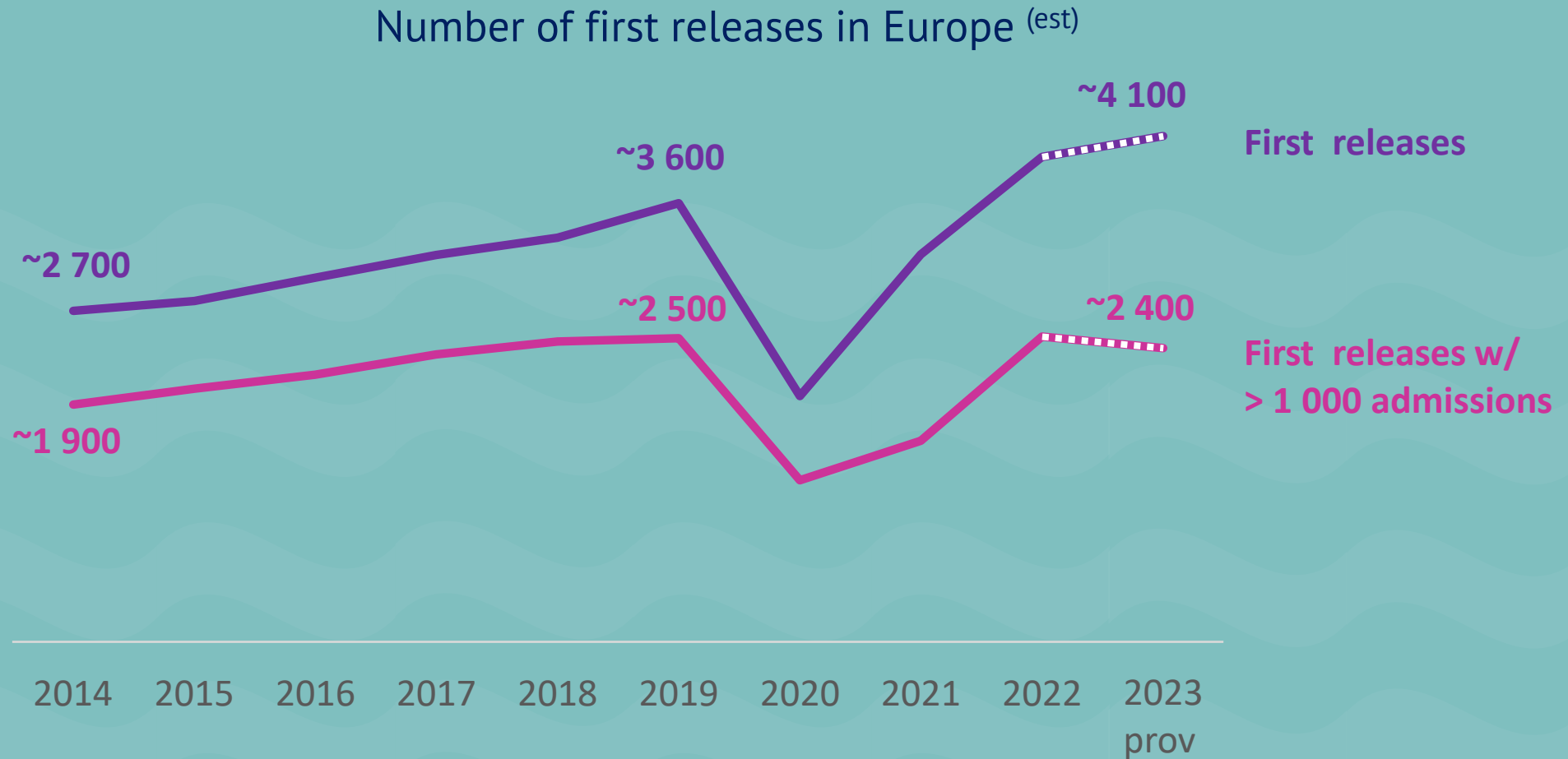
Admissions (mio)	1.0
Films on release	n/a
<b>Nr of distributors</b>	<b>4</b>
<b>First releases</b>	<b>~146</b>



Source: LUMIERE / European Audiovisual Observatory (EAO)

# Film releases

# More films released than ever, ...



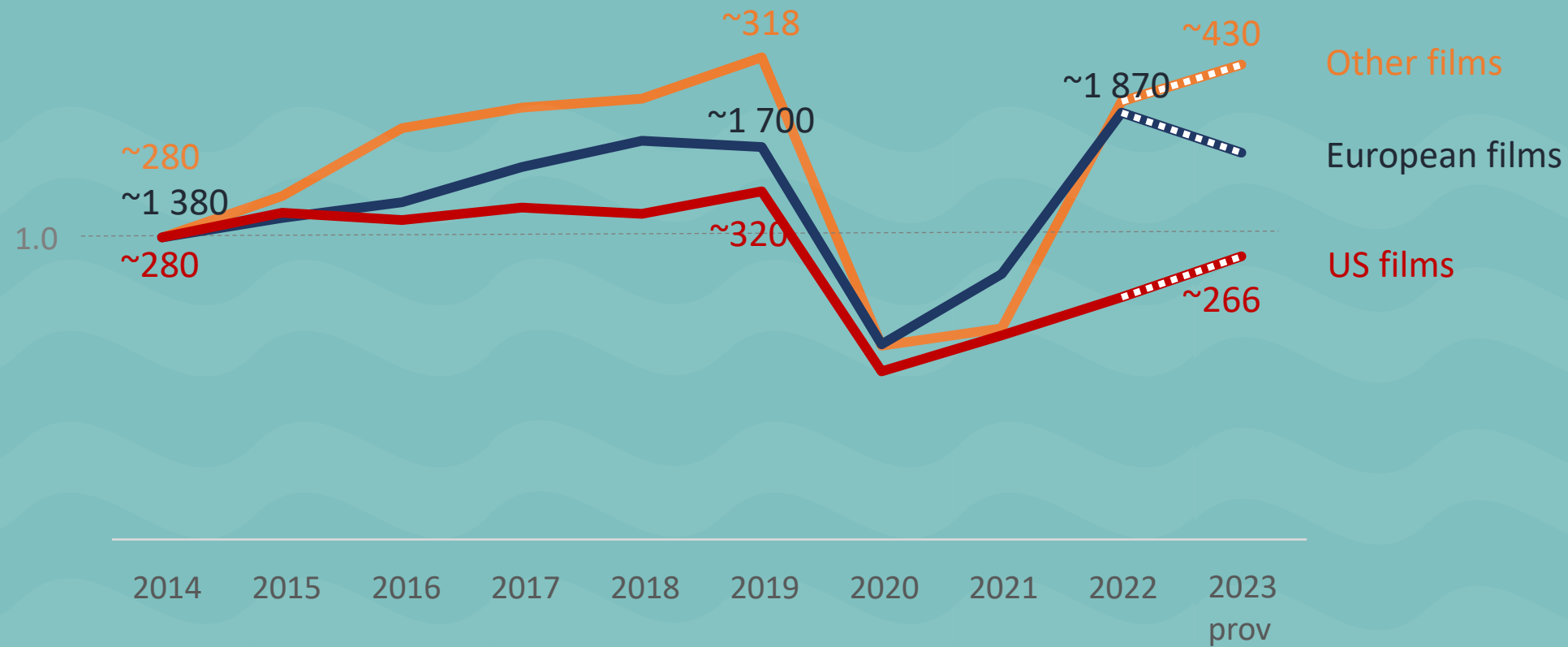
Source: European Audiovisual Observatory (EAO)

# ... still less US films though



## First releases in Europe – by region of origin (est)

With more than 1 000 admissions. Indexed development



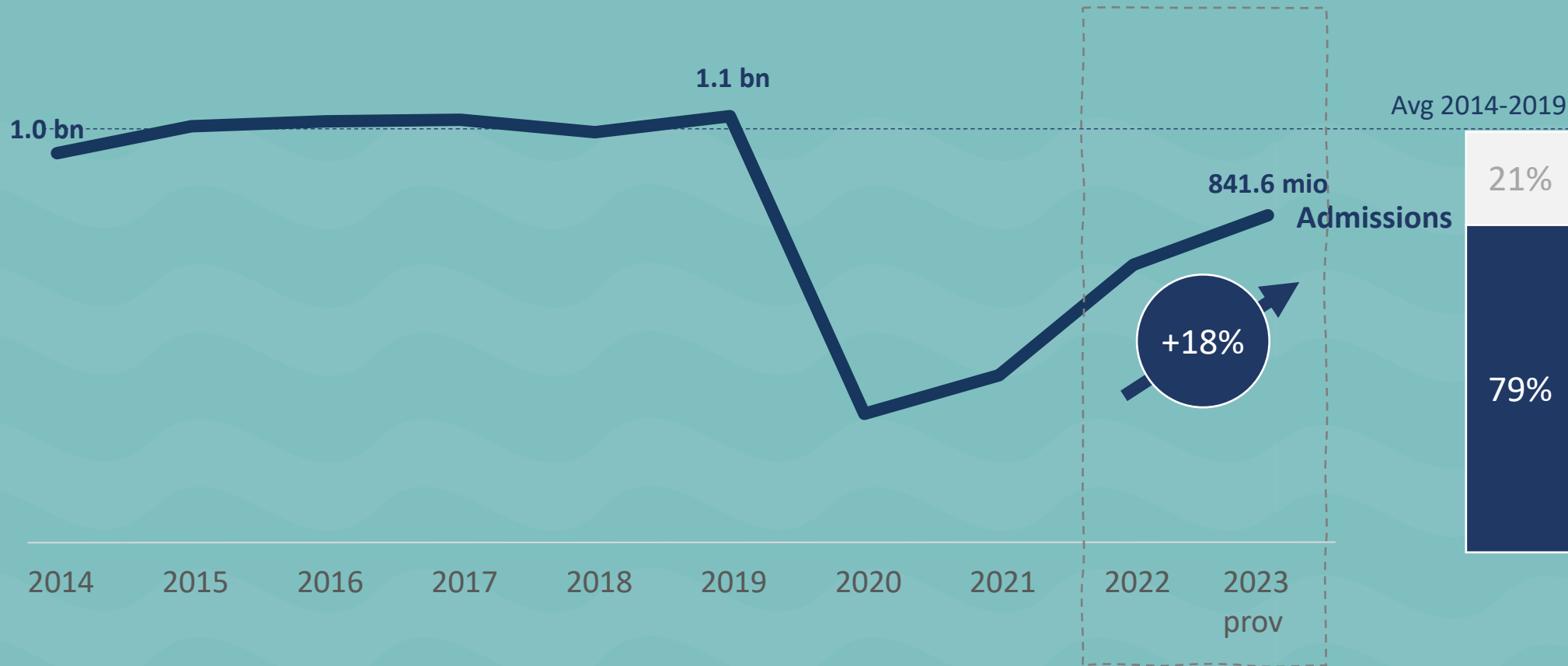
Source: European Audiovisual Observatory (EAO)

# Box office development

# Admissions climb back to ~80% of pre-pandemic average



Admissions & GBO in wider Europe (est)

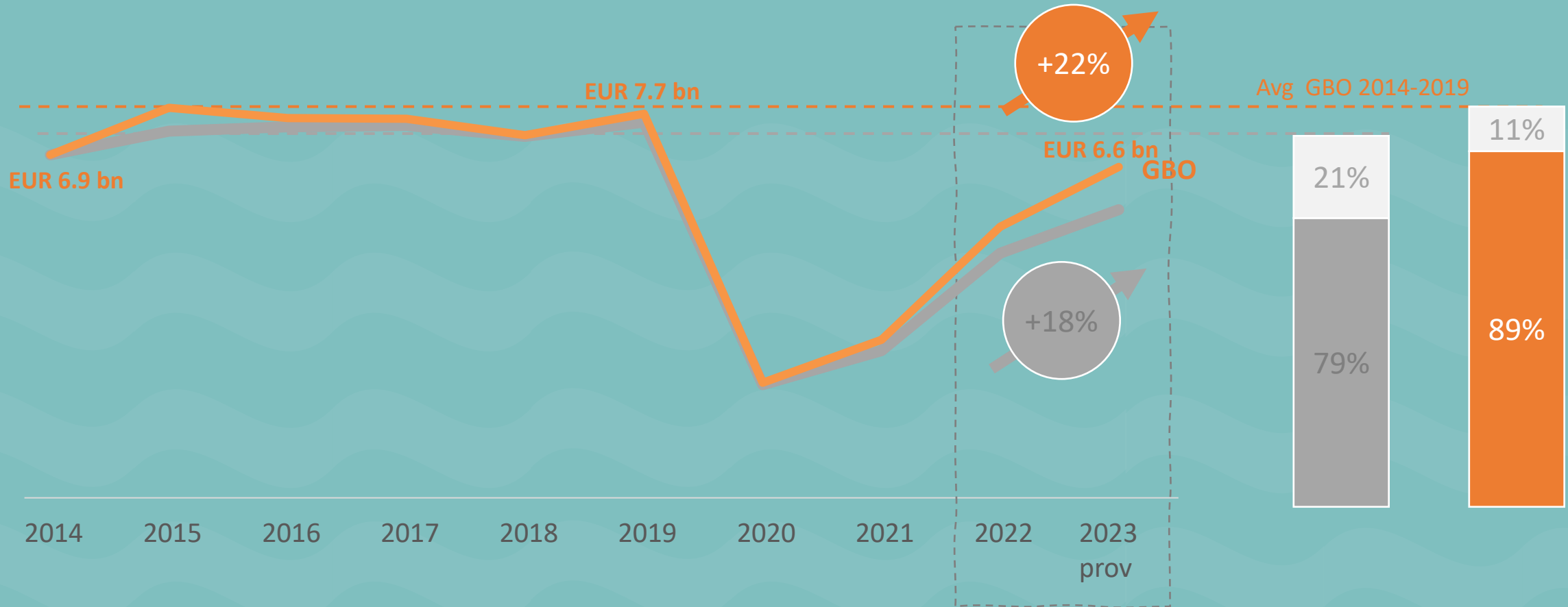


Source: European Audiovisual Observatory (EAO)

# Admissions climb back to ~80% of pre-pandemic average



Admissions & GBO in wider Europe (est)



Source: European Audiovisual Observatory (EAO)

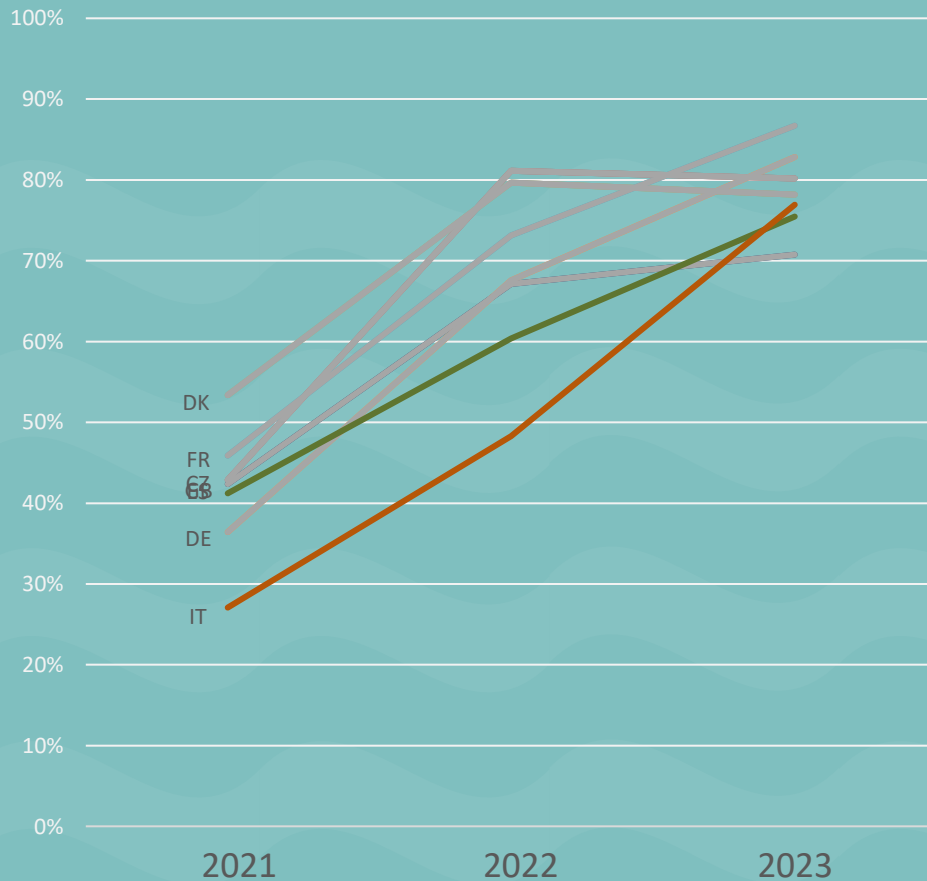
**Could this be a new normal?**



# 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%

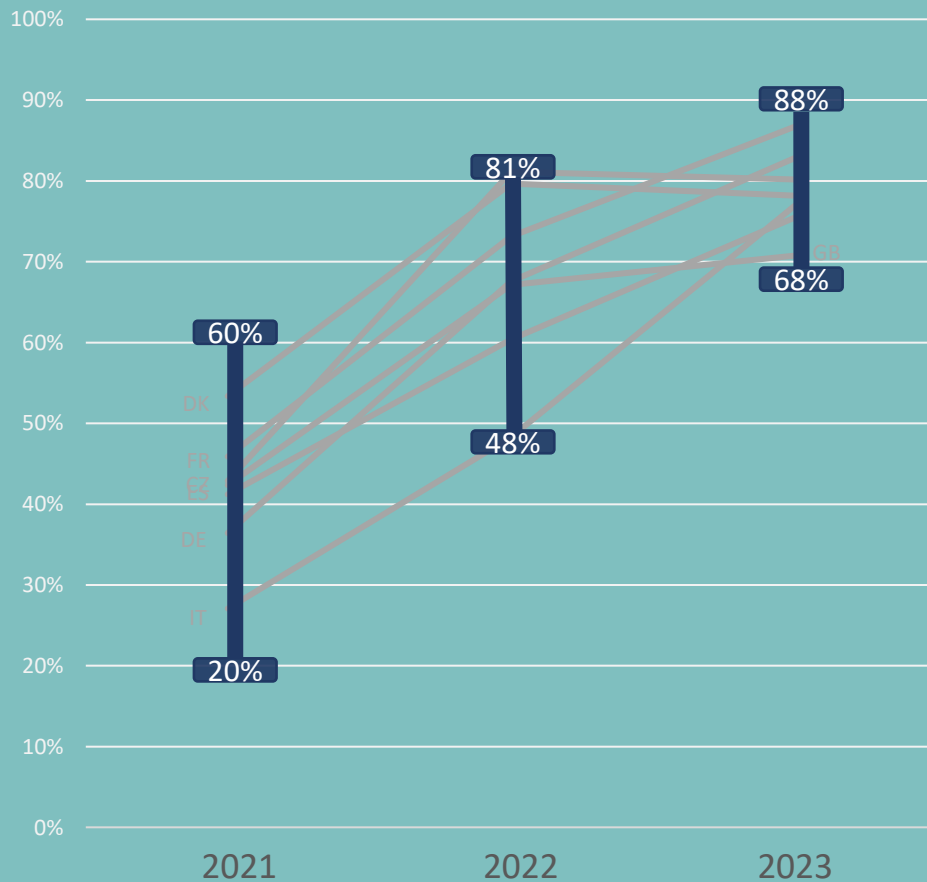
Markets with a recovery rate of <75% in 2022:

21%

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Recovery rates in selected markets 2021-2023



Source: European Audiovisual Observatory (EAO)

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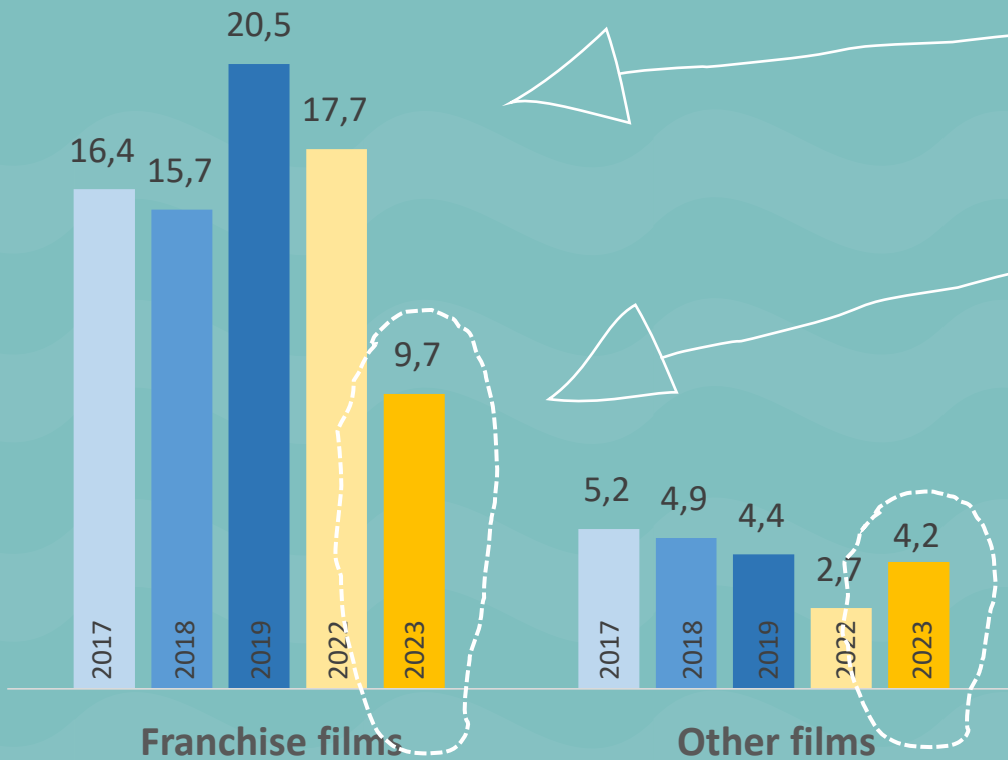
Markets with a recovery rate of <75% in 2022:

21%

## 2 | Lower appetite for franchise films?



Avg admissions to top 30 films in Europe (est)



Clearly franchise films perform better

Significant drop in average admissions in 2023

Source: LUMIERE / European Audiovisual Observatory (EAO)

# 3 | 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*
- *Political instability*
- *Extreme weather*

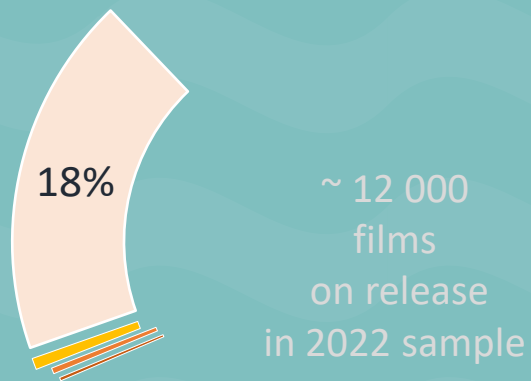
Something new

Composition of the  
European box office markets  
by film type

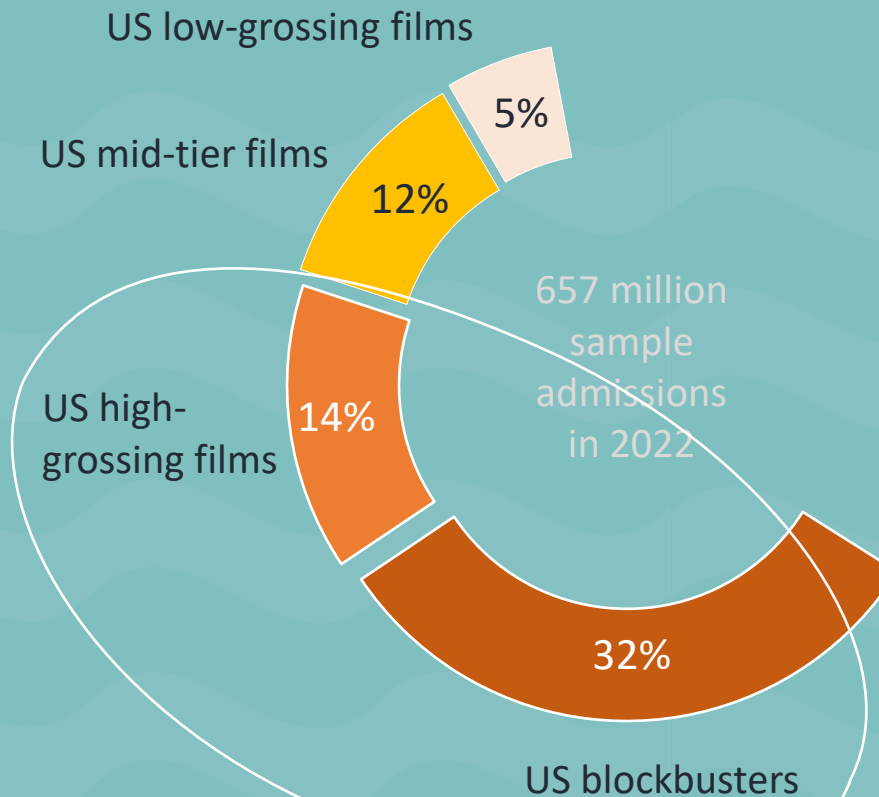
# US blockbusters & high-grossing films account for almost 50%



Nr of films breakdown -2022 (est)



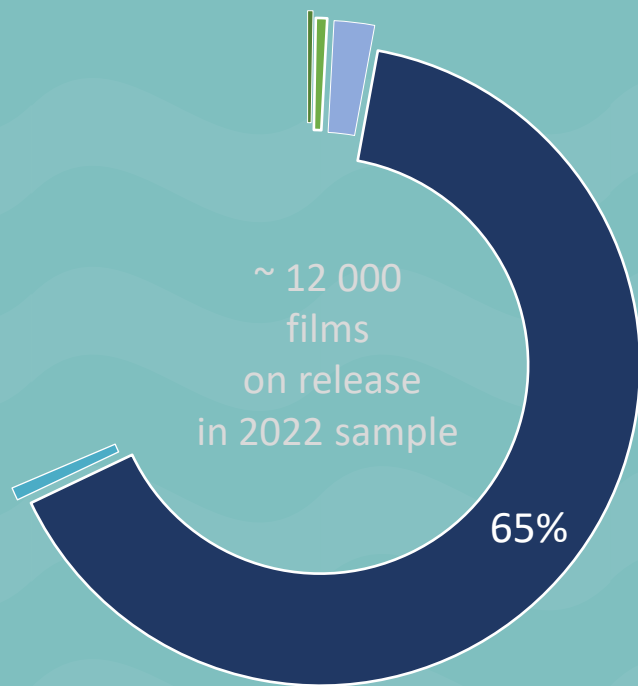
Admissions breakdown 2022(est)



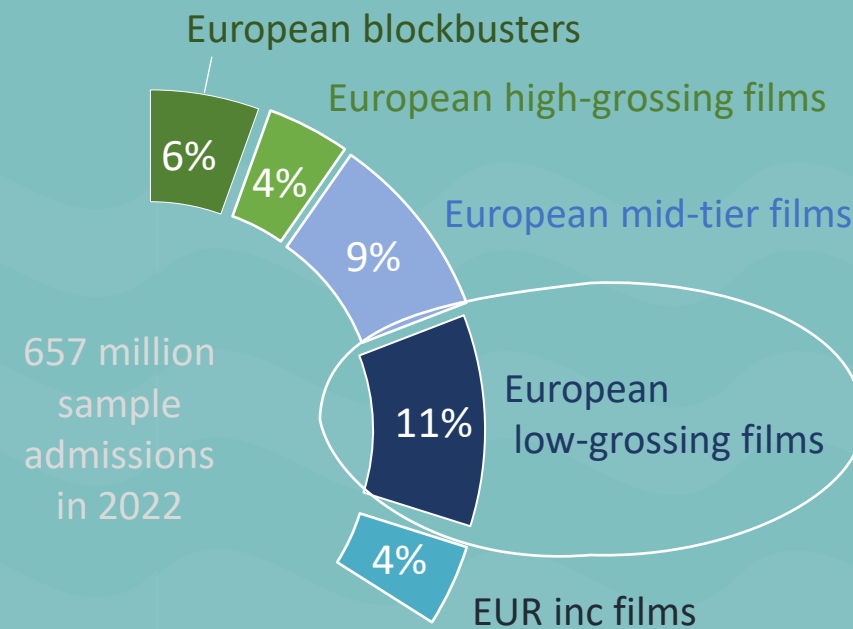
# ... but European low-grossing films play important role



Nr of films breakdown -2022 (est)



Admissions breakdown 2022(est)

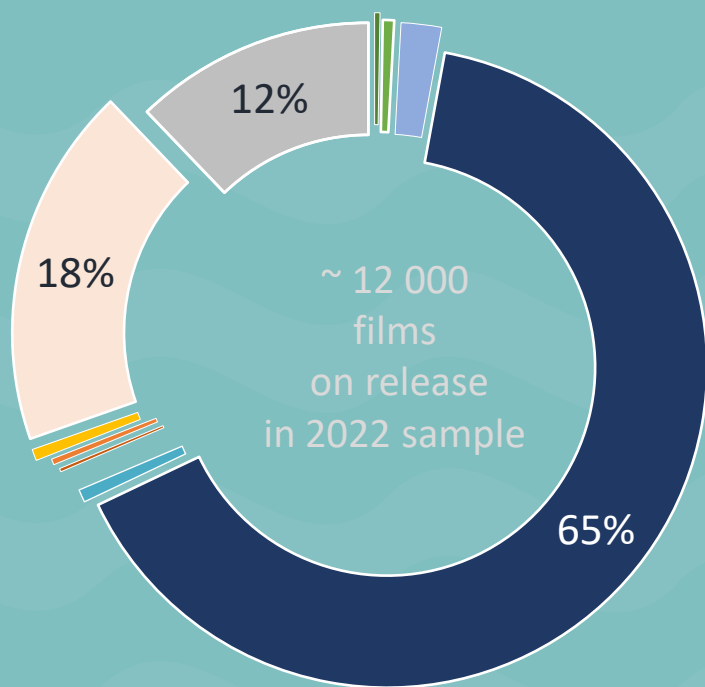




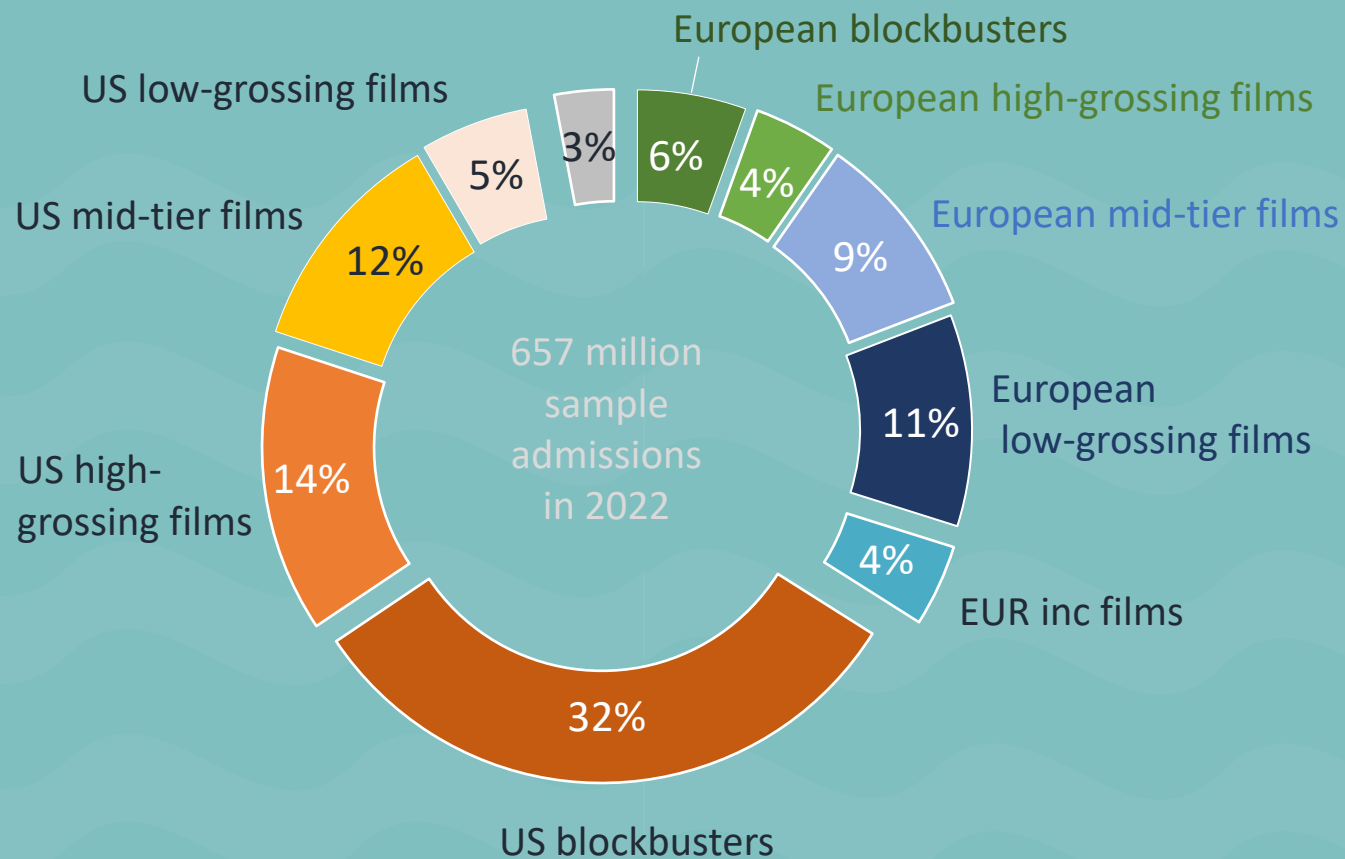
# Diverse mix of films essential for overall box office



Nr of films breakdown -2022 (est)



Admissions breakdown 2022(est)

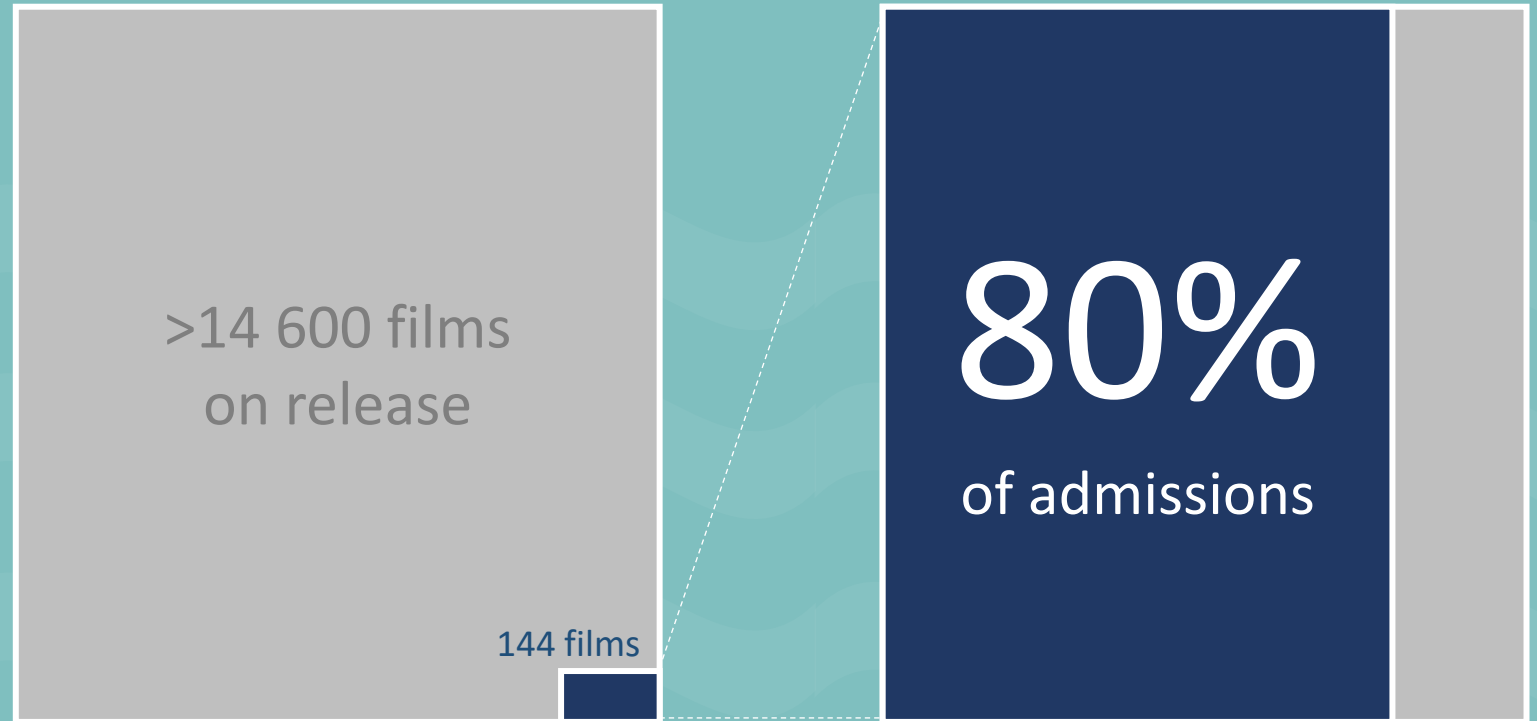


# Concentration

Exceptionally high  
box office concentration  
in 2022 and 2023...

Very diverse  
offering,  
highly  
concentrated  
admissions

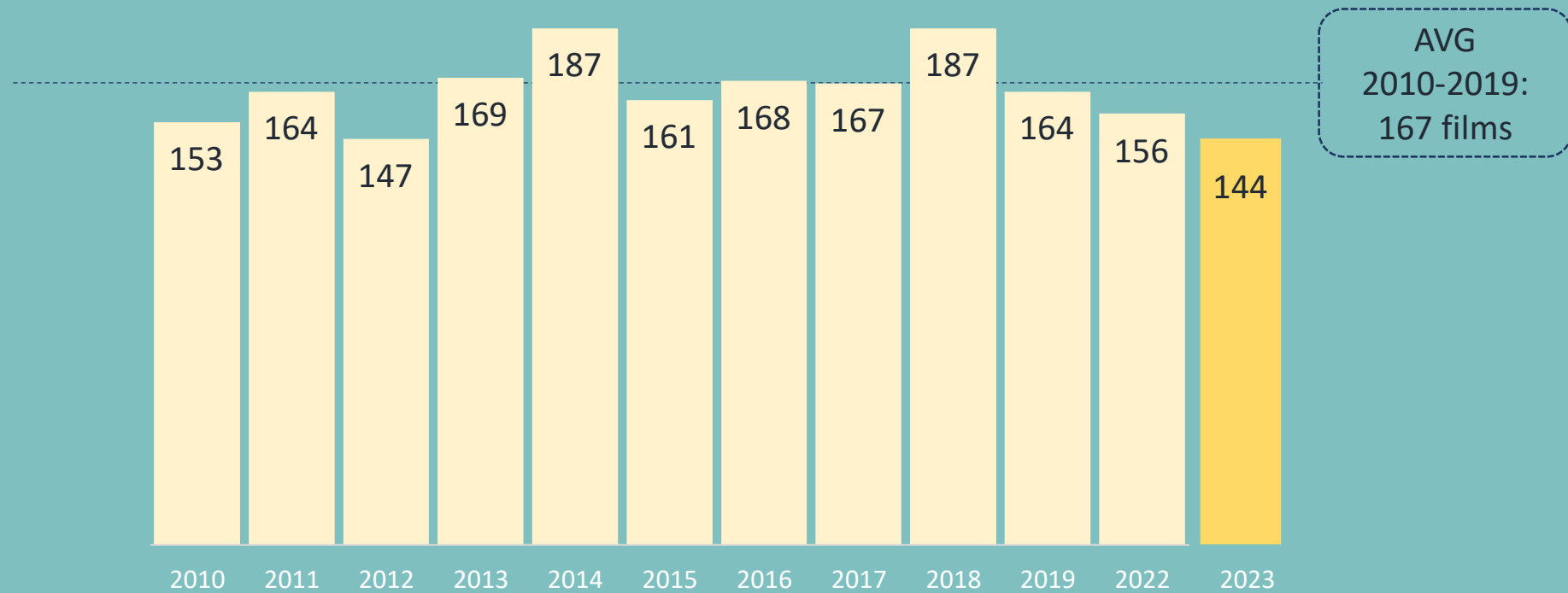
Nr of films generating 80% of total admissions in Europe - 2023



Source: OBS / LUMIERE

# Both, in terms of nr of films generating 80% of admissions ...

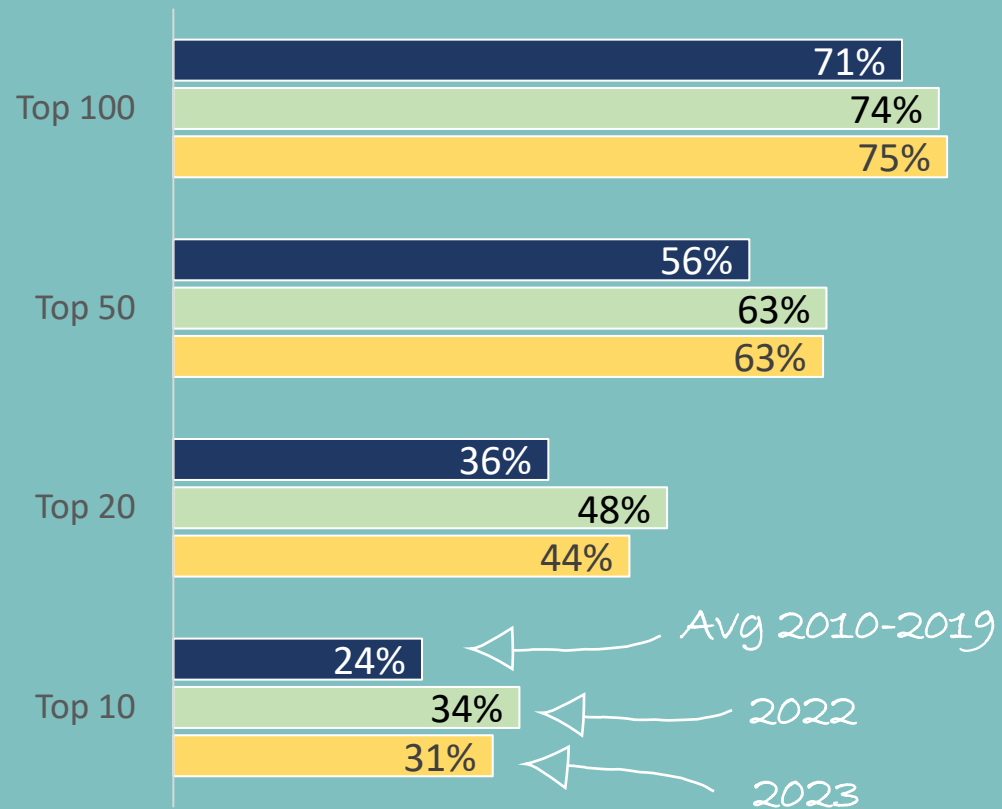
Number of films generating 80% of annual admissions in Europe – 2010-2023



Source: OBS / LUMIERE

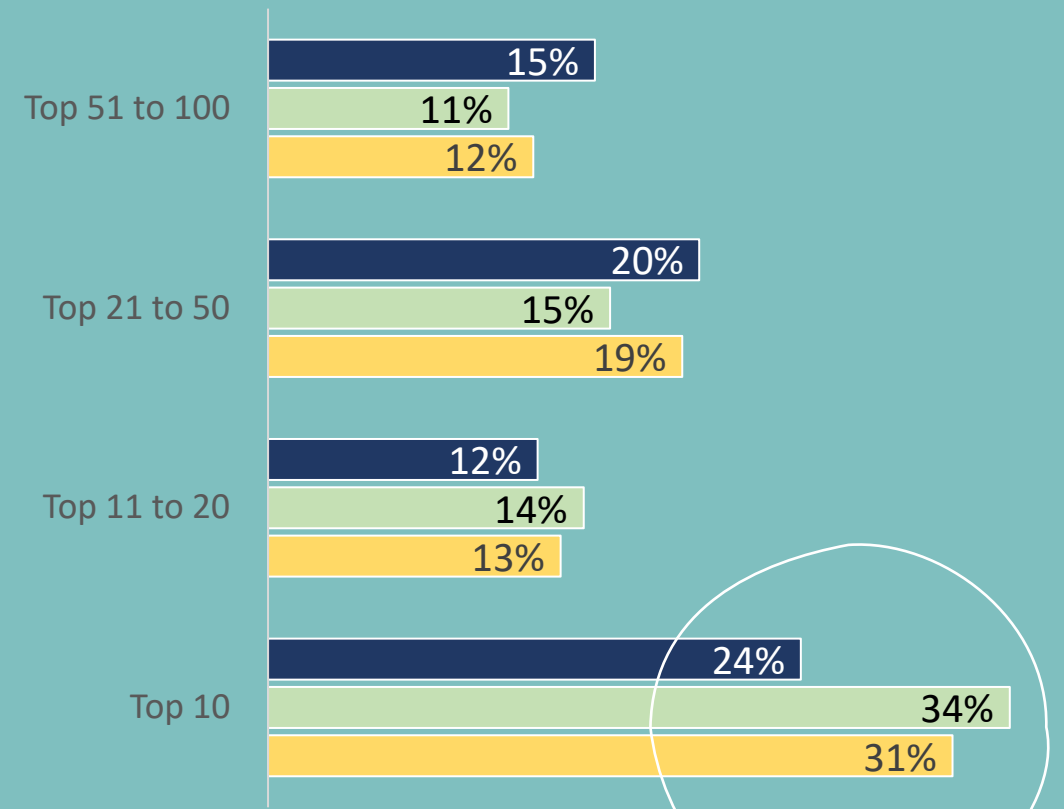
... as well as in terms of share of top films

Admissions share of top films



Source: OBS / LUMIERE

Adm share of top films by brackets



Source: OBS / LUMIERE

So, in a seashell

Theatrical markets are back  
and remain key ...



... but, possibly at a lower level and  
with higher concentration

again, potentially  
significant differences  
among markets

# focus 2024

## WORLD FILM MARKET TRENDS

