



European cinema market trends

Back to the future?

Europa Cinemas Exhibitors Meeting
Cannes, 21st May 2023

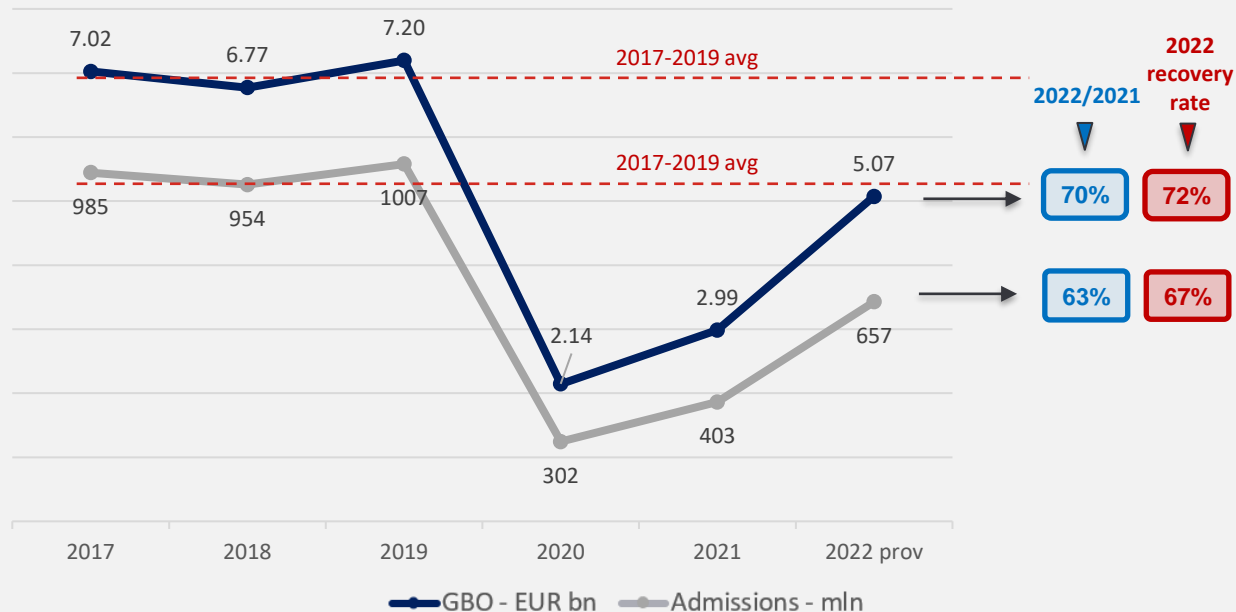
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European Audiovisual Observatory



Cinema attendance up 63% on 2021 (still 1/3 lower than pre-pandemic average)

GBO revenues and admissions in Europe 28 (2017-2022)

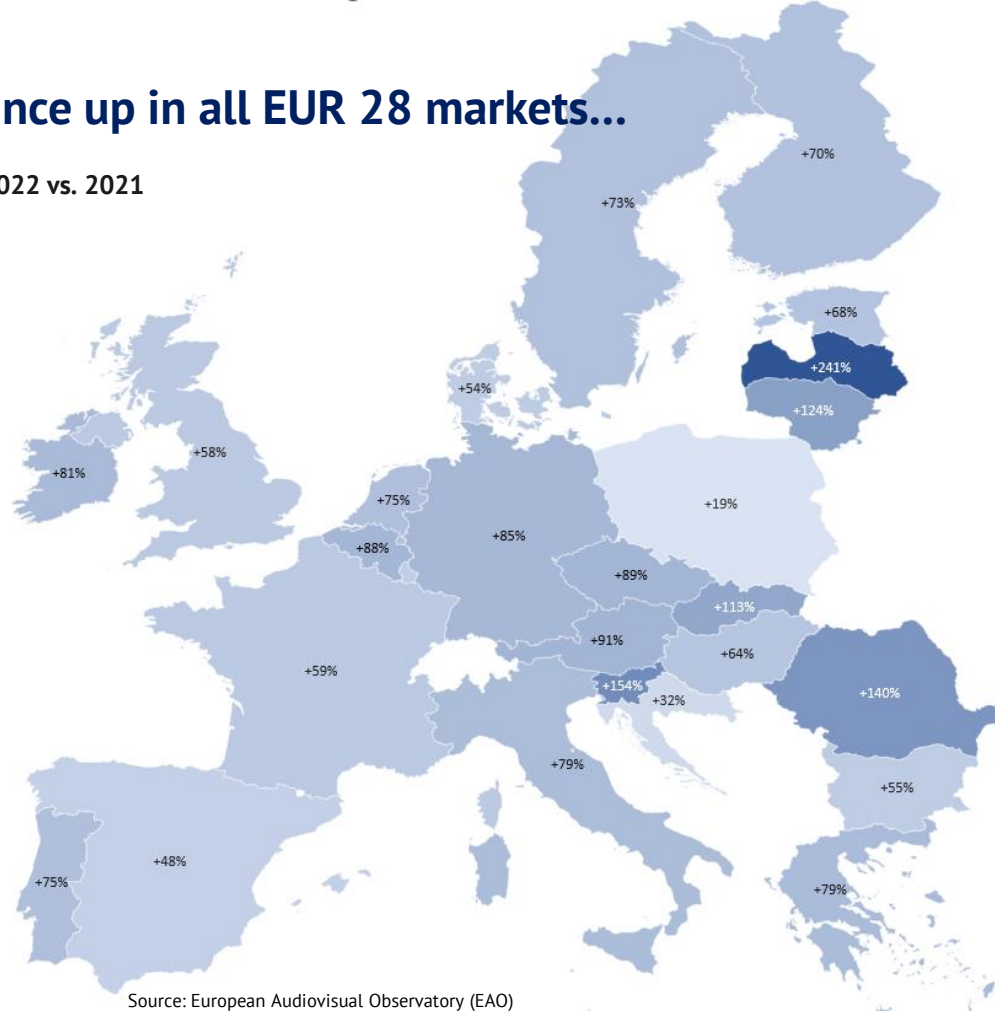
In EUR billion; In million admissions



Source: European Audiovisual Observatory (EAO)

Cinema attendance up in all EUR 28 markets...

Change in admissions 2022 vs. 2021

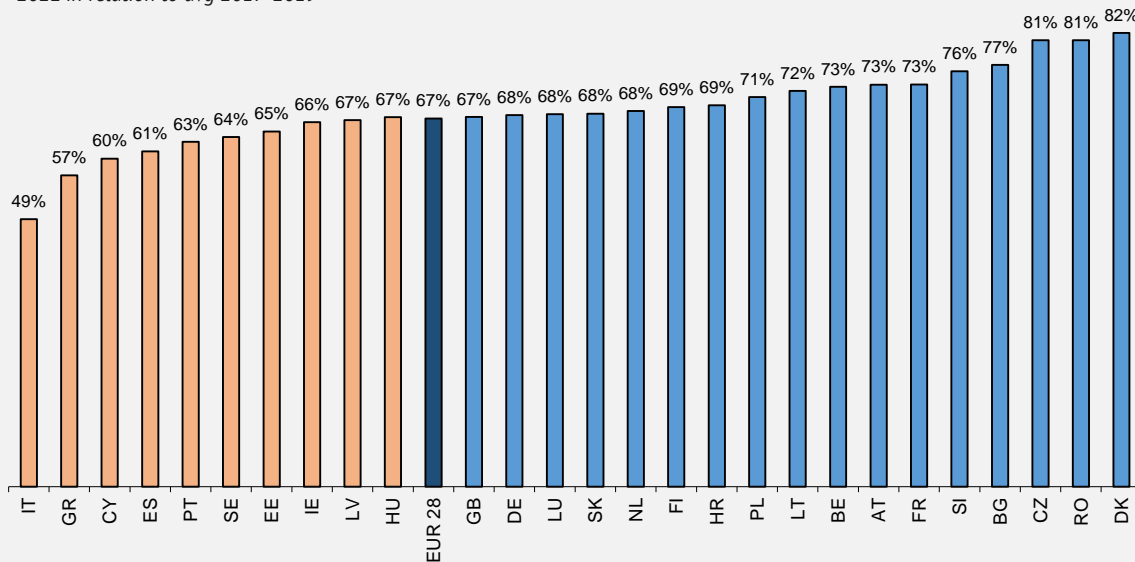


Source: European Audiovisual Observatory (EAO)

The level of recovery largely varies across markets

Relative recovery rate of admissions in Europe 28

2022 in relation to avg 2017-2019

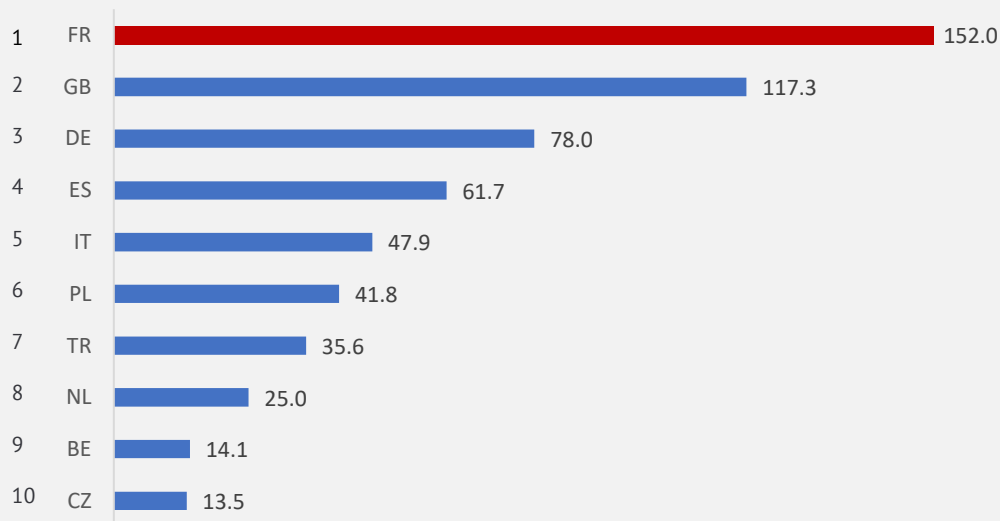


Source: European Audiovisual Observatory (EAO)

France was the biggest markets for admissions

Top European markets by admissions, 2022

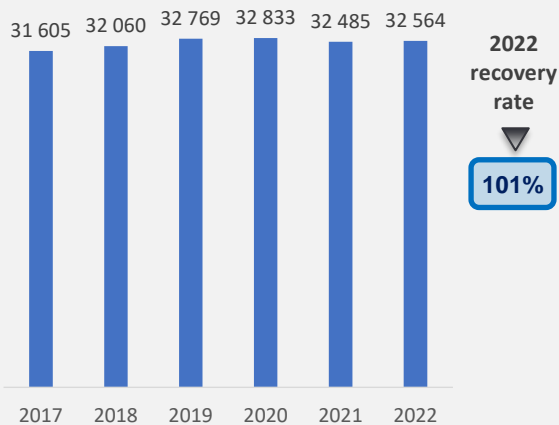
In million admissions



Source: European Audiovisual Observatory (EAO)

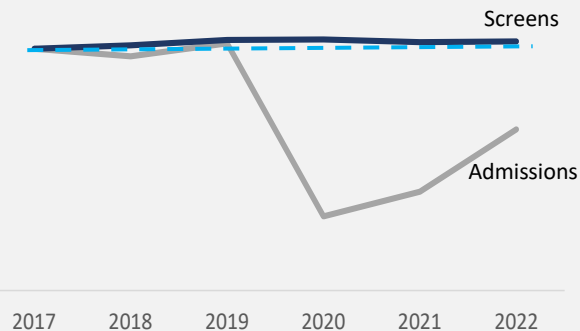
No reduction in the number of cinema screens

Number of screens in Europe 28 (est)



Source: European Audiovisual Observatory (EAO)

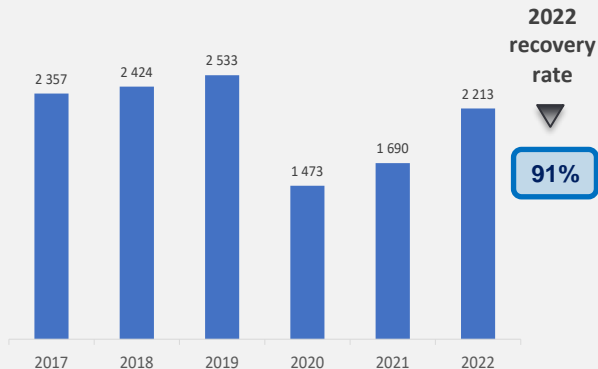
Indexed screens vs. admissions – Europe 28



Source: European Audiovisual Observatory

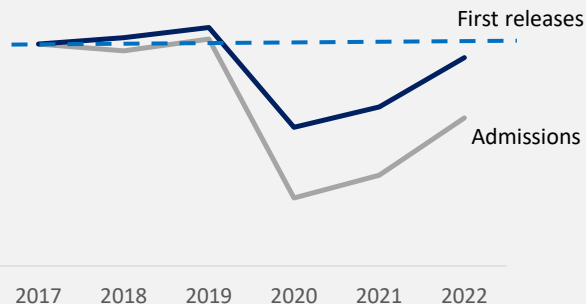
Number of first releases almost back to pre-pandemic levels...

Number of first releases in Europe 28 (est)



Source: European Audiovisual Observatory (EAO)

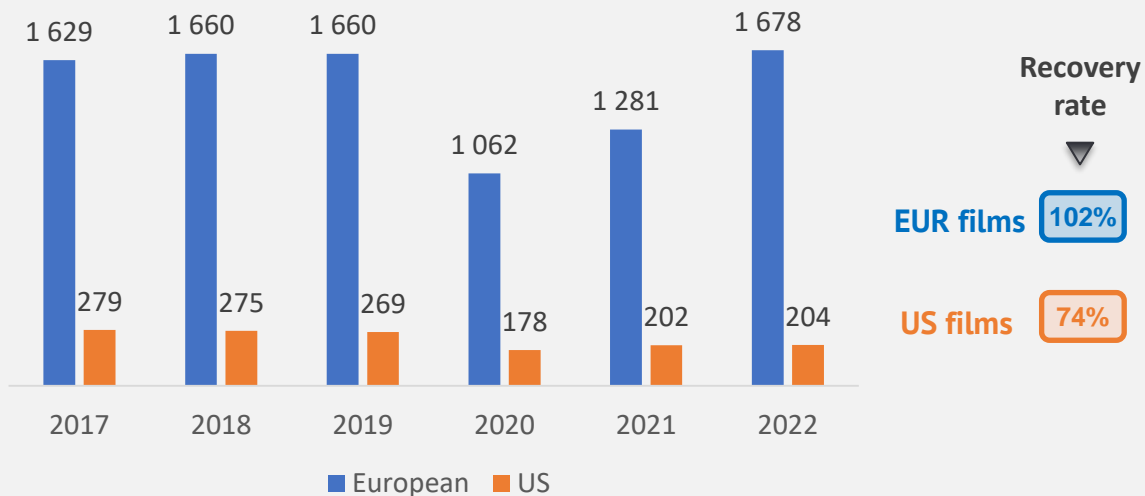
Indexed first releases vs. admissions - Europe 28



Source: European Audiovisual Observatory (EAO)

... but fewer US films

Number of European and US first releases in Europe 28

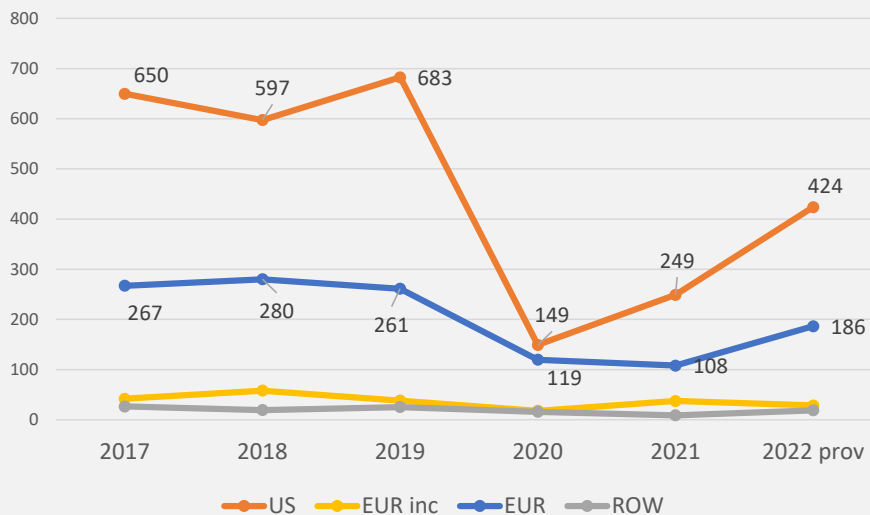


Source: European Audiovisual Observatory (EAO)

European films recovered slightly better than US films

Breakdown of admissions by origin of films in Europe 28

In million admissions



**2022
recovery
rate**
▼

US films **66%**

EUR films **69%**

EUR inc films **62%**

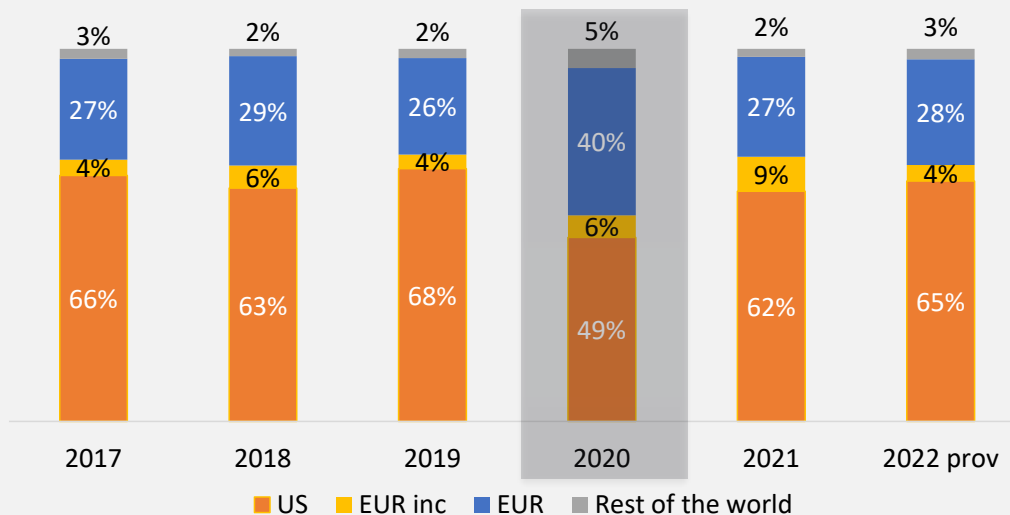
Other films **79%**

Source: European Audiovisual Observatory (EAO)

European films took 28.4% of admissions

Market share by region of origin in Europe 28, 2017-2022

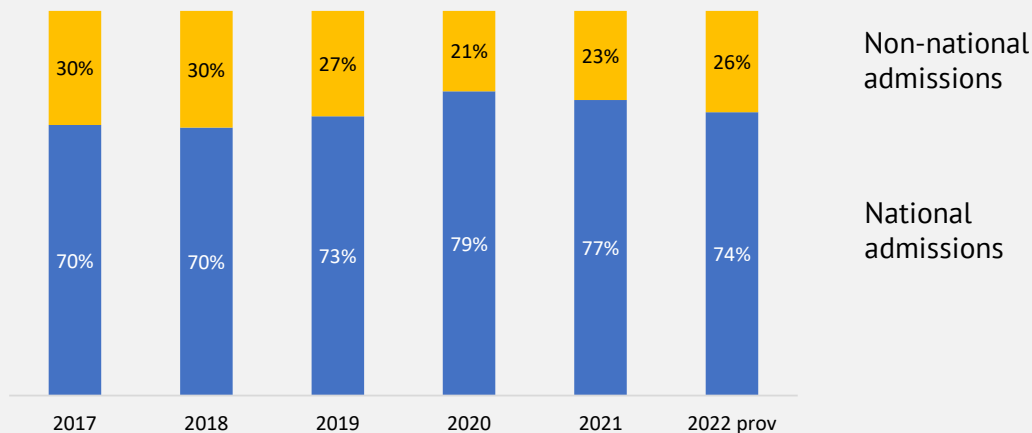
In %



Source: European Audiovisual Observatory (EAO)

The % of European non-national films slightly up on 2021

Breakdown of admissions to European films in Europe 28, 2017-2022

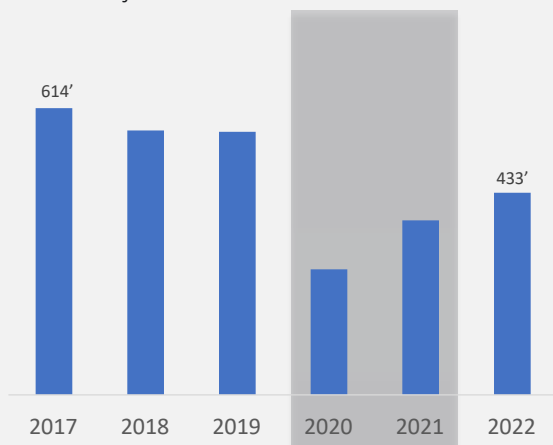


Source: European Audiovisual Observatory (EAO)

Fewer admissions per film...

Avg annual admissions per film* in Europe 28

In number of admissions

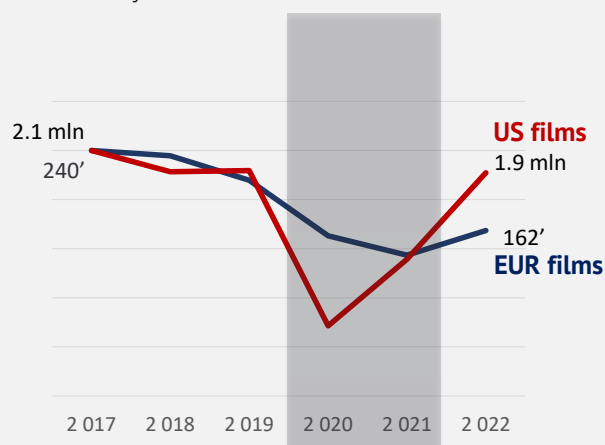


Source: European Audiovisual Observatory (EAO)

* Calculated only on films taking > 10 000 admissions.

Indexed average admissions to European and US films* in Europe 28

In number of admissions



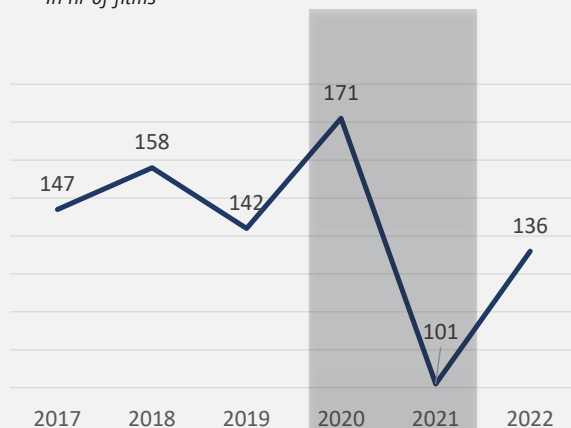
Source: European Audiovisual Observatory (EAO)

* Calculated only on films taking > 10 000 admissions.

... and higher concentration at the top

Nr of films taking 80% of ticket sales in Europe 28*

In nr of films

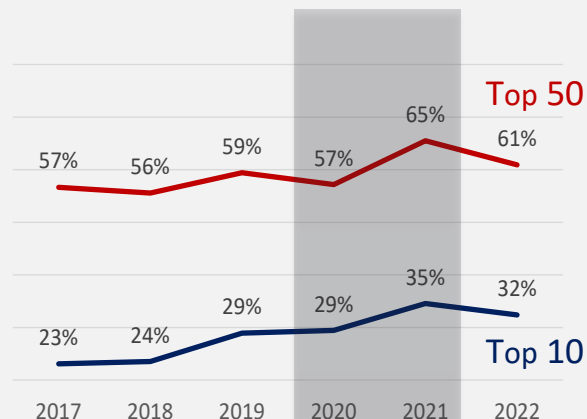


Source: European Audiovisual Observatory (EAO)

* As registered in LUMIERE

Share of top films in Europe 28

In % of admissions

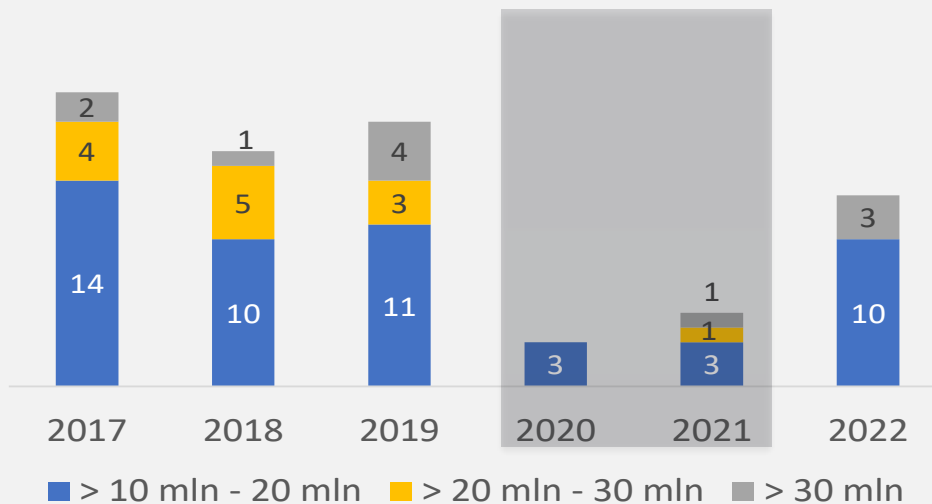


Source: European Audiovisual Observatory (EAO)

A total of 13 films took more than 10 million admissions in 2022

Number of films by admissions brackets in Europe 28

In number of films



Source: European Audiovisual Observatory (EAO)

Top feature films by admissions in Europe 28 - 2022



1

Top Gun: Maverick (US)

34.4 mln



2

Avatar: The Way of Water (US)

30.6 mln



3

Minions: The Rise of Gru (US)

30.2 mln



4

Doctor Strange in the Multiverse of Madness (US)

20.0 mln



5

Jurassic World: Dominion (US / CN)

18.1 mln

Top European films by admissions in Europe 28 - 2022



1

Fantastic Beast: The Secrets of Dumbledore (GB inc / US)



15.0 mln



2

Downton Abbey: A New Era (GB inc / US)



4.1 mln

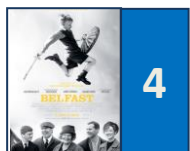


3

Qu'est-ce qu'on a tous fait au bon Dieu? (FR / BE)



3.8 mln



4

Belfast (GB)



3.7 mln



5

The King's Man (GB inc / US)

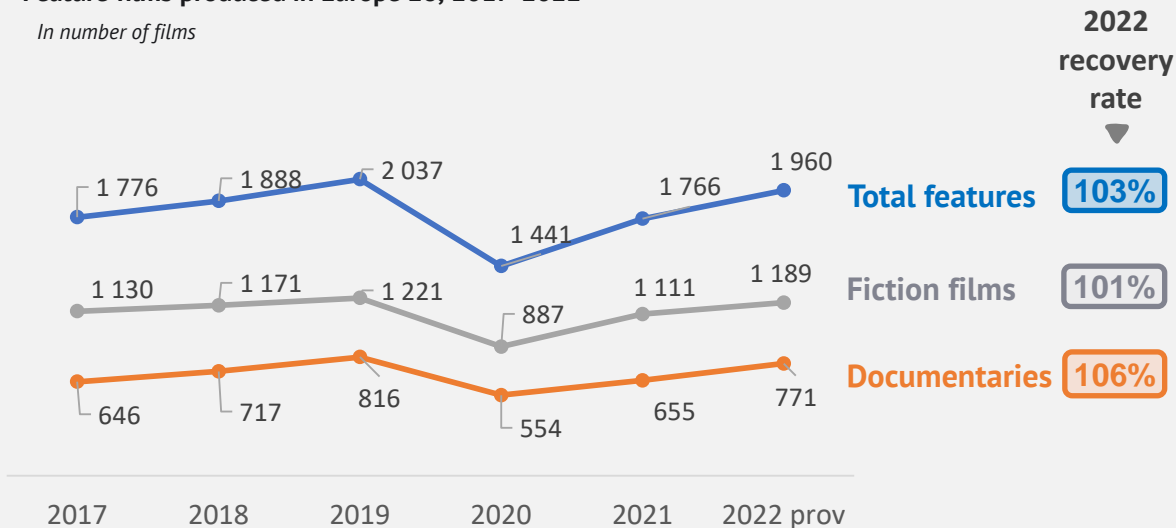


3.3 mln

Production levels seemingly not impacted by BO decline


Feature films produced in Europe 28, 2017-2022

In number of films



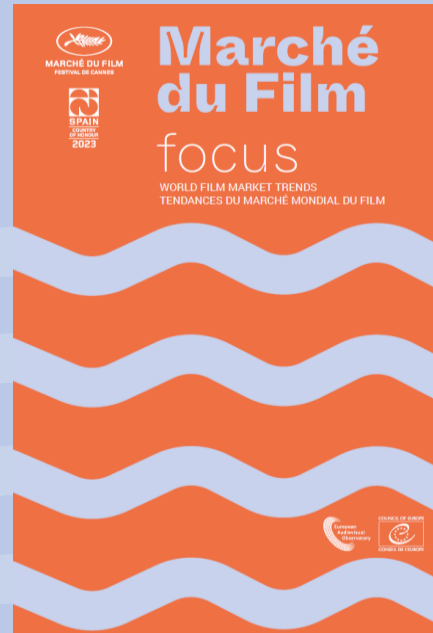
Source: European Audiovisual Observatory (EAO)

Summing up: 2022 vs. pre-pandemic avg

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- ... Lower attendance levels; screen count stable.
 - ... Nr of first releases almost back to normal (but fewer US releases).
 - ... Higher concentration & lower avg admissions per film.
 - ... European films recovered slightly better than US films.
 - ... Market % of European films in line with pre-pandemic levels.
 - ... Production levels seemingly unaffected by the BO decline.

**Pick up your
free copy!**

Observatory stand H.1



Thank you for your attention!

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