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The Theatrical Market for European Films Outside Europe

Key Figures 2014

Martin Kanzler

A report by the
European Audiovisual Observatory

December 2015

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Director of publication

Susanne Nikoltchev
Executive Director, European Audiovisual Observatory

Author

Martin Kanzler
Film Analyst, Department for Information on Markets and Financing, European Audiovisual Observatory
martin.kanzler@coe.int

Contributor

Laura Ene
Film Analyst, Department for Information on Markets and Financing, European Audiovisual Observatory

Supervising editor

Gilles Fontaine
Head of the Department for Information on Markets and Financing, European Audiovisual Observatory

Marketing

Markus Booms, European Audiovisual Observatory, markus.booms@coe.int

Press and Public Relations

Alison Hindhaugh, European Audiovisual Observatory, alison.hindhaugh@coe.int

Proofreading

Anthony Mills

Translation

Deutsch: Patricia Lux-Martel
Français: France Courrèges

Publisher

European Audiovisual Observatory, 76 Allée de la Robertsau, 67000 Strasbourg, France
Tel.: +33 (0)3 90 21 60 00 / Fax: +33 (0)3 90 21 60 19 / www.obs.coe.int

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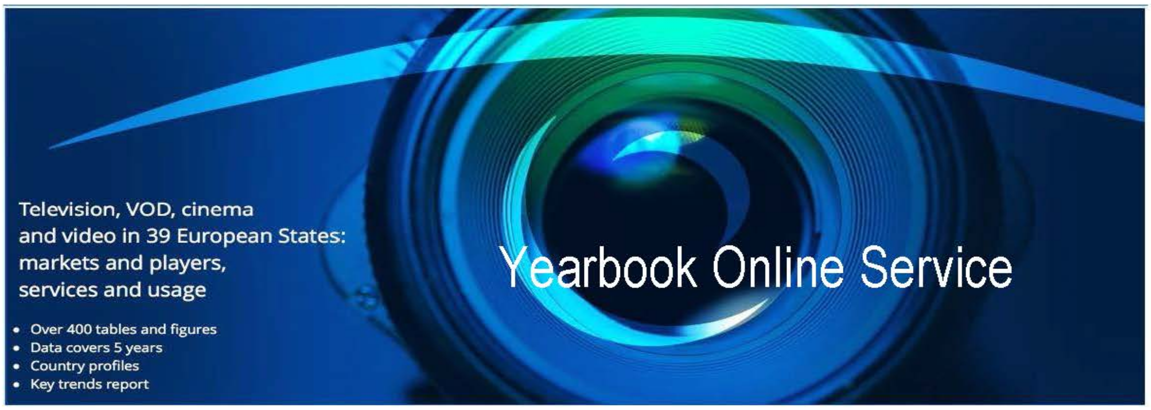

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INTRODUCTION & EXECUTIVE SUMMARY

1 Introduction

About this report

This report aims to provide a **high-level analysis** of the theatrical markets for **European films outside Europe** based on admissions data provided by Rentrak for 12 non-European markets including the North American market, five Latin American markets, China and South Korea as well as Australia and New Zealand. The analysis **focuses on 2014 data** but is **complemented by five-year data series** for the period **2010 to 2014** for all major indicators.

The report focuses on providing a **„big picture" overview of the circulation of European films as a whole rather than analysing the film exports of individual European countries.** The latter may require different – sometimes country specific – methodological choices / research angles which are beyond the scope of this report. It is important to note that in particular because of the Observatory's choices regarding the allocation of a unique country of origin based on the majority financing share as well as the exclusion of films financed with incoming foreign investment data presented in this report may differ significantly from data published by national sources such as the British Film Institute or the CNC / UniFrance. **For the analysis of the export of films originating from a specific country, please refer to national sources.** See methodological remarks for further details.

The report addresses in particular the following **research questions**:

- How many European films are theatrically released outside Europe?
- How many admissions and GBO do they generate?
- How important is the theatrical exploitation outside Europe for European films?
- What is their market share in the respective non-European markets?
- What are the most important theatrical „export" markets for European films?
- Which European countries „export" how many films and how do they perform?
- What were the 100 top performing European films?

About the European Audiovisual Observatory

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
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European Audiovisual Observatory (OBS)

The European Audiovisual Observatory (hereafter 'Observatory') is a European public service body comprising 40 member states and the European Union, represented by the European Commission. It operates within the legal framework of the Council of Europe and works alongside a number of partner and professional organisations from within the audiovisual industries. The mission of the Observatory is to collect, process and publish information about the various audiovisual industries, i.e. primarily film, TV, home entertainment and on-demand industries in Europe. In these areas the Observatory systematically collects statistical data and provides market as well as legal analysis which are distributed e.g. in the form of:

- print or electronic **publications**, including a statistical Yearbook, as well as **newsletters** and **thematic reports** or the Observatory's **website**;
- free **databases** on film admissions (LUMIERE), TV & on-demand services (MAVISE), AV law information (IRIS Merlin) and public funding (KORDA);
- contributions to **conferences**.

2 Data Sources & Methodology

Data sources

The data sample analysed in this report comes from two sources: Admissions data for the 12 **non-European markets** covered in this report have been provided **Rentrak Corporation**, a leading research company tracking global box office figures (see below). While 2014 and 2013 data have been purchased by the European Audiovisual Observatory on behalf of a buying group consisting of several EFARN members, data for the years 2010 to 2012 have been kindly provided by the French CNC and the European Union's MEDIA Programme. All **European admissions data** come from the **European Audiovisual Observatory's LUMIERE database** which collates annual admissions from a wide variety of sources (see below).

RENTRAK

www.rentrak.com

Rentrak Corporation

Rentrak is a leading entertainment industry research company measuring audiences of audiovisual content across all screens. It has established tracking and analytical systems which are used by movie studios, cable, telecom and satellite operators, broadcasters, advertisers, media agencies and video-on-demand content providers. In September 2015 Rentrak merged with comScore, another leading media industry measurement company.

LUMIERE

www.lumiere.obs.coe.int

LUMIERE database on film admissions

The Observatory's LUMIERE database is a free database which tracks cinema admissions to films in Europe since 1996. Admissions data come from a wide variety of sources, including national film agencies and statistics offices, inter-industry bodies, distributors' and exhibitors' associations, the trade press and a small number of private tracking bodies. This is supplemented and completed by data from the European Union's MEDIA Programme, on the basis of declarations made by distributors to its Automatic Distribution Support scheme.

CNC

www.cnc.fr

CNC (Centre national du cinéma et de l'image animée)

The CNC (the French national centre of cinematography) is a public administrative organisation with a legal entity status and financial autonomy. It operates under the authority of the Ministry of Culture and Communication. The CNC's principal responsibilities are (i) regulation, (ii) support for the economy of the film, television video, multimedia and technical industries, (iii), the promotion of films and television productions and their dissemination to all audiences and (iv) the preservation and enhancement of cinema heritage.

Creative Europe MEDIA

https://eacea.ec.europa.eu/creative-europe_en

MEDIA Programme

The MEDIA sub-programme of Creative Europe supports the EU film and audiovisual industries financially in the development, distribution and promotion of their work. It helps to launch projects with a European dimension and nurtures new technologies; it enables European films and audiovisual works including feature films, television drama, documentaries and new media to find markets beyond national and European borders; it funds training and film development schemes.

Data scope

In principle the data set covers **title-by-title admissions data** for all **feature films on release**, i.e. films with at least one commercial theatrical screening in one of the markets covered. This includes holdovers, re-releases, retrospectives, paid festival screenings etc. **Alternative content screenings and short film compilations are not taken into account.**

This report covers **2014 admissions data** for **12 non-European markets** and puts them in the context of admissions data for another **34 European markets** covered in the LUMIERE database:

Market region	Countries covered
North America	1. Canada (CA) 2. USA (US)
Latin America	3. Argentina (AR) 4. Brazil (BR) 5. Chile (CL) 6. Colombia (CO) 7. Mexico (MX) 8. Venezuela (VE)
Oceania	9. Australia (AU), 10. New Zealand (NZ)
Asia	11. China (CN), 12. South Korea (KR)
Europe (covered at least partially)	Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, FYRO Macedonia, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Luxembourg, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK & Ireland (treated as one market)

However, **please note that there are differences in the coverage rate** of individual markets[1] which **can distort the direct comparability of statistical indicators**. This is particularly true with regard to the number of **films on release:** In many European countries LUMIERE seems to cover a higher number of smaller and “repertoire” films with very few admissions than Rentrak outside Europe. The number of films on release in Europe is hence portrayed as significantly higher than outside Europe. Given the lack of comprehensive and fully comparable data sets, it cannot be determined to which degree these are structural differences and to which degree this is simply caused by more limited data sets for non-European markets. Also note, that Rentrak data for the US and Canadian market appear to not provide full coverage of admissions to French language films e.g. in Québec. Hence, all data in this report drawn from LUMIERE are to be interpreted as **estimated minimum figures**. Year-on-year comparisons are presented in the appendix.

[1] Though the LUMIERE database aims to cover all 40 member states of the European Audiovisual Observatory, in practice coverage rates vary across individual territories. The overall coverage of the database for the reference period is generally estimated at around 86% of the total European market. See appendix for a full overview of LUMIERE coverage rates by market.

Methodological remarks & definitions

How to measure "film market volume"?

Theatrical feature films are commercially exploited across a variety of different distribution windows. However, it is practically impossible to quantify the total market volume for theatrical films across all these windows. This is primarily due to methodological challenges faced by the variety of business models through which theatrical films can be commercially exploited on the one hand, and the intransparency of certain market segments with regard to consumption data on the other hand.

The approach chosen in this report is to measure market volume in terms of consumer expenditures on film. Methodologically speaking this approach can be easily applied to measure the market volume of theatrical markets (gross box office), physical video retail and rental markets as well as transactional VOD markets. It gets however more complicated when it comes to the exploitation of films on TV or SVOD services, where there is generally no direct link between consumer expenditures and the consumption of theatrical films. In order to overcome this issue one could e.g. estimate corresponding retail equivalent values as done for instance by the British Film Institute.

However it is the intransparency of most exploitation markets with regard to consumption data which poses the major obstacle in measuring film market volume across the various windows. The theatrical cinema market is practically the only window for which reliable data are available. While in most countries data are in fact being tracked for the home entertainment (DVD / BluRay retail and rental), and TV markets they are generally not made available to the general public and are sold at prohibitive prices which makes their tracking practically impossible for an organisation like the Observatory. In the case of VOD markets, the situation is even worse as they still remain more or less completely intransparent with regard to consumer expenditures in the vast majority of markets.

Given these difficulties, this report focuses on measuring the theatrical market volume for European films in terms of admissions (number of cinema tickets sold) and GBO (gross box office) which is estimated by multiplying admissions with annual average ticket prices – converted to Euros using the average annual bid rate for the calendar year 2014 – within each territory covered in this report.

Why may data presented in this report differ from data published by other sources?

Broadly speaking, data differences may be caused by different data sets and / or different methodological choices. Given the focus of this report on providing a „big picture" overview of the circulation of European films as a whole rather than analysing the film exports of individual European countries, the Observatory's methodological choices – in particular regarding the allocation of a unique country of origin based on the majority financing share as well as the exclusion of films financed with incoming foreign investment – may differ from methodologies applied by national sources who seek to analyse the export of films originating from their countries. Data presented in this report may hence differ significantly from data published by national sources such as the British Film Institute or the CNC / UniFrance. For the analysis of the export of films originating from a specific country, please refer to national sources.

What is the definition of "film" in the context of this report?

In principle the data set covers all **feature films on theatrical release**, i.e. films with at least one commercial theatrical screening in one of the markets covered. This includes - from a methodological perspective - holdovers, re-releases, retrospectives, paid festival screenings etc. Alternative content screenings and short film compilations are not taken into account.

What does the term "film offering" stand for?

In the context of this report the term "film offering" refers to the number of films on release. It should of course be noted that the number of films on release is the most basic indicator for measuring the theatrical film offering in a country and - in itself - has limited informational value with regard to how many European films were actually accessible to audiences. It does not provide any information about the actual availability of a film - which depends entirely on the number of screens the film is shown on and the frequency of screenings, as well as the number of days / weeks it remains in cin-emas. These data could however not be analysed within the scope of this report.

What does "on release" mean?

Any film that has at least one commercial theatrical screening in a territory is considered as a film "on release". This includes first releases, holdovers, re-releases, retrospectives, paid festival screenings etc. Please note that differences in the coverage rate of individual markets and in particular differences between Europe and non-European markets regions can limit the direct comparability of the indicator "number of films on release" and distort any related statistical analysis: In many European countries LUMIERE seems to cover a higher number of smaller and repertoire films with very few admissions than covered by Rentrak data outside Europe. The number of films on release hence is portrayed as significantly higher in some markets than in others. Given the lack of comprehensive and fully comparable data sets, it cannot be determined to what degree these are structural differences and to which degree this is simply caused by more limited data sets for non-European markets.

What is a "first release"?

A "first release" is defined as a film which gets commercially released for the first time in a specific territory. The concept of "first release" is by definition linked to a specific market, as films can be released in one market in one year and in another the subsequent year and will appear as first releases in different years in national statistics in both markets.

It is difficult to identify the number of first releases: On the one hand, there is an issue with regard to data quality: release dates may be missing or may refer to the "release date" in a particular year rather than the original release date of the film. Hence some re-releases / holdovers / festival releases might be counted as commercial first releases and all data are to be considered estimates. On the other hand, there is an inherent methodological issue in defining a "first release" on a multi-territory basis which is best illustrated by an example: A French film can be released in France in 2012, in the US in 2013 and in China in 2014. Should this film be counted as a first release outside Europe in 2014? In answering this question, one can apply two different definitions:

- *Wide definition*: A first release outside Europe refers to films that were first released in at least one non-European market in a specific year. According to this definition the above mentioned film is considered a first release in 2014, as it is counted as such in China.
- *Narrow definition*: A first release outside Europe refers to films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before. When applying this definition to a region, the regions is treated as if it were a single market. According to this definition the above mentioned film is considered a first release outside Europe in 2013 and an "other release" in 2014.

What are "admissions"?

Admissions refer to the number of cinema tickets sold for the theatrical screening of a film.

What is "GBO"?

GBO stands for gross box office and refers to consumer expenditure on cinema tickets. As LUMIERE only covers admissions data, GBO figures are estimated by applying the average ticket price in a market to the number of admissions. In some markets where only GBO figures but no admissions data were available, the same method is used to estimate admissions.

What is the definition of a "European film"?

European films are all films considered to be of European origin, i.e. to **be produced and majority financed by** a European country. In the context of this report all **member states of the Council of Europe** are considered to be European states.

European films produced with incoming investment from US studios such as the *Harry Potter* or the *James Bond* franchises ("INC" films as defined below) are in principle not considered to be European in the context of this sample. Because of their untypically high box office potential they would distort admission and global circulation statistics for 'typical' European films. In the context of this report they are hence generally considered as US films.

However, INC films designated as European films by the European Commission or Europa Cinemas are counted as European films. A list of "EUR INC" films counted as European films in the context of this report can be found in the appendix

Please note that this exclusion of "INC films" concerns primarily UK films and may hence result in significant differences to publications on film exports by national sources such as the British Film Institute.

What is an "INC" film?

The **"INC"** marker is a contraction of "**incoming investment"**. An "incoming investment" film is defined as one for which the main producer is a **company established in a country** but **under the ownership and/or control of a company registered in another country** (mostly a US studio).

Thus a film categorised as "GB inc / US" is a film produced in the United Kingdom (GB) where the main producer is a United Kingdom-registered company which may be wholly or partially owned or controlled by a US company. A "FR inc / US" film is a work produced in France (FR) where the main producer is French-registered company wholly or partially owned or controlled by a US company. These films are particularly hard to identify as the Observatory does not have access to detailed production information on films. There may hence be mistakes in the classification of „INC" films and the Observatory occasionally revises its attribution when further information becomes available. Readers noticing any inaccurate origin allocation for a specific film are invited to contact the Observatory team under lumiere@obs.coe.int.

As mentioned above EUR INC films are – by default – not considered to be European films in the context of this report (see above).

What is the definition of "Europe"?

Europe as a region of origin is defined as the 47 member states of the Council of Europe (see http://www.coe.int/en/web/portal/47-members-states)

Europe as a market refers to the entirety of the 34 European markets for which at least partial admissions data is available in the Observatory's LUMIERE database (see data scope).

How is a film allocated to its "country of origin"?

In order to calculate market shares by country of origin without double counting films, each film has is allocated a **unique country of origin** within the LUMIERE database.

Defining the nationality of a film is a complex task. There are no widely accepted international or even European definitions of the criteria to be used to determine the country of origin of a film. This is both a legal and a statistical problem. Different national records - and the statistics on which they are based - can show the same film as having a whole range of nationalities.

Adopting a pragmatic approach, the Observatory considers as the country of origin of a specific film the country out of which the film is financed. In the case of international co-productions (defined below) the film is assigned to the country which provides the majority share of production financing. The Observatory tries to list all co-producing countries in the order of their financial investment in the film (whether known or assumed), with the country having provided the majority financial investment in the production in first place, e.g. a "FR/DE" co-production is considered to be French film in the context of this report.

Please note, that the allocation of a country of origin in LUMIERE may differ from the allocation applied by national film agencies or other organisations, and so may consequently any statistics based on the country of origin.

What is the definition of "co-production"?

A co-production is defined as a film whose production budget is financed by sources stemming from two or more countries. The country providing the majority of the financing, i.e. the majority coproduction country, is considered to be the country of origin. In the case of an parity co-production, e.g. Germany 40% / France 40% / Spain 20%, the nationality of the director and subsidiarily the cultural content of the film determine to which country the film is allocated on a case-by-case basis. Co-productions are indicated in LUMIERE by the allocation of at least two countries of origin, e.g. "AT / DE" stands for an Austrian majority and German minority co-production.

This definition of a co-production is not identical with the qualification as an "official co-production" (which is based on satisfying the requirements set out in the relevant co-production treaties, or those of the European Convention on Cinematographic Co-production) but also includes co-productions that are not necessarily registered by the national film agencies. For instance this can be the case where national broadcasters co-produce feature films with foreign partners.

The Observatory identifies co-productions on the basis of information provided by various sources. When a new film is created the system will, by default, apply the countries of origin as indicated on IMDB. These data are consequently checked and adjusted by using information provided by national film agencies and / or the trade press.

As a consequence the qualification of a film as a co-production and its allocation to a specific country of origin by the Observatory may differ from co-production listings published by other sources.

As the Observatory does not have access to detailed production information on films, it does not claim to have got its identification right in every case and it occasionally revises its attribution when further information becomes available. Readers noticing any inaccurate origin allocation for a specific film are invited to contact the Observatory team under lumiere@obs.coe.int

What are "national" / "non-national" admissions / markets?

The country of origin is considered to be the "national" market of a film. All other markets are referred to as "non-national" markets. Accordingly, "national" admissions are defined as admissions in the country of origin of the film, i.e. 100% national or majority co-producing country. All other markets – including other (minority) co-producing countries – are considered as non-national markets. For example Spain is considered the national market for *Planet 51*, an ES/UK co-production, while the UK release is counted as a non-national release. „Non-national" admissions are consequently admissions generated outside of the national home market.

What does "worldwide" refer to?

In the context of this report the term "worldwide" refers to the entirety of the 34 European and 12 non-European markets which are – at least partially – covered in this report.

What does "Outside Europe" / "non-European" mean exactly?

In the context of this report the terms "outside Europe" or „non-European markets" refer to the 12 non-European markets covered in this report.

How is "average" defined?

In the context of this study an average value can be expressed either as the "mean" or the "median" value. The mean refers to the arithmetical total of all the values in the array divided by the number of values. The median is found by arranging the values in order and selecting the middle value. It is pointed out at each occurrence in the text to which of the two terms the word "average" refers.

How reliable are the underlying data sets?

The Observatory collects data from what it considers to be the most reliable data sources in each territory. However, there can be significant differences in the coverage rates among individual markets and / or years which may have an impact on the interpretation of the data. The coverage rates of each market for the years 2010 to 2014 are shown in the appendix.

The Observatory is furthermore in no position to verify the accuracy of the data provided by the various third party data sources. Neither the Observatory nor its third party sources can warrant that the provided data are free of errors, omissions or other inaccuracies.

How were Rentrak and OBS film data matched?

The title-by-title admissions lists provided by Rentrak were imported into the LUMIERE database via a process of title matching. In cases where Rentrak could not provide any admission figures, admissions were estimated by dividing the gross box office result by the average annual ticket price of the market in question.

By integrating the non-European admissions into LUMIERE the European Audiovisual Observatory was in a position to calculate market shares for European films in non-European countries based on the same methodology as for the European markets. Of particular importance in this context is the allocation of a country of origin to any individual film (see above).

LUMIERE

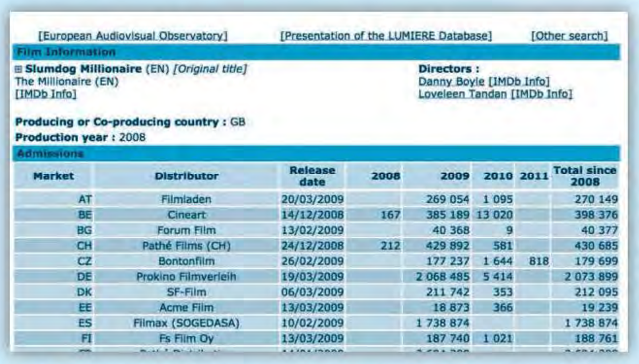
http://lumiere.obs.coe.int

Free access

DATABASE ON ADMISSIONS OF FILMS RELEASED IN EUROPE

Main features

- Yearly admissions to more than 54 000 films released in Europe since 1996
- Release dates
- Identification of distributors
- Country-by-country breakdown
- Original title and alternative language titles
- Graphs and breakdown of EU-admissions
- Covers 30 European countries and the North American market (USA and Canada)
- Clearly identified data sources
- Annual updates
- ISAN (International Standard Audiovisual Number)
- All listings exportable as an EXCEL table



[European Audiovisual Observatory] [Presentation of the LUMIERE Database] [Other search]

Film Information

Slumdog Millionaire (EN) *[Original title]*
The Millionaire (EN)
[IMDb Info]

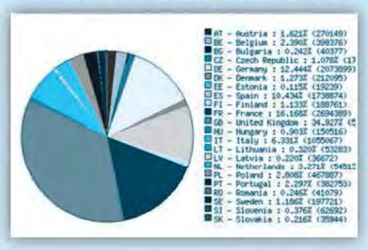
Directors :
Danny Boyle [IMDb Info]
Loveleen Tandan [IMDb Info]

Producing or Co-producing country : GB
Production year : 2008

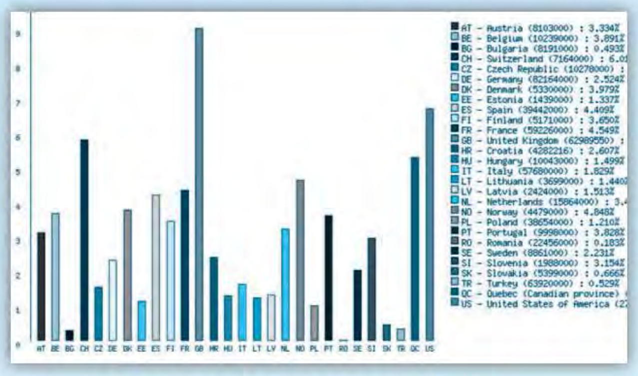
Admissions

Market	Distributor	Release date	2008	2009	2010	2011	Total since 2008
AT	Filmladen	20/03/2009		269 054	1 095		270 149
BE	Cineart	14/12/2008	167	385 189	13 020		398 376
BG	Forum Film	13/02/2009		40 368	9		40 377
CH	Pathé Films (CH)	24/12/2008	212	429 892	581		430 685
CZ	Bontonfilm	26/02/2009		177 237	1 644	818	179 699
DE	Prokino Filmverleih	19/03/2009		2 068 485	5 414		2 073 899
DK	SF-Film	06/03/2009		211 742	353		212 095
EE	Acme Film	13/03/2009		18 873	366		19 239
ES	Filmax (SOGEDASA)	10/02/2009		1 738 874			1 738 874
FI	Fs Film Oy	13/03/2009		187 740	1 021		188 761

LUMIERE delivers precise annual admission figures for ***30 European countries, USA and Canada.***



Visualise the annual breakdown of admissions ***in the national markets in the European Union.***



Percentage of the ***population having seen the film.***

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3 Executive Summary

This report **focuses on the theatrical exploitation** of European films outside Europe. It has to be kept in mind that the theatrical window is only one out of – broadly speaking - four market segments. Foreign TV, Video and VOD markets may also provide relevant market potential for European films but cannot be quantified due to intransparency of corresponding consumption figures.

Theatrical market volume of European films outside Europe 2014

An estimated total of **589 European films were on theatrical release** in at least one of the 12 non-European markets covered in this report. This is the largest number of „exported" films **outside Europe** in the past five years and represents **about 10% of the total number of European films on release worldwide** (see Figure 1 below).

These 589 films cumulatively generated about **82 mio admissions** outside Europe resulting in an estimated **EUR 496 mio in gross box office** in 2014. Due to estimated growth on the Chinese market this is slightly above previous yearly levels, excluding exceptionally high results in 2012 (see Figure 2).

European films accounted for **21% of the tracked number of films on release** (slightly higher than the 5 year average of 19%) and **3% of admissions** generated in the 12 non-European sample markets.

Figure 1 European films on release outside Europe in 2010-2014

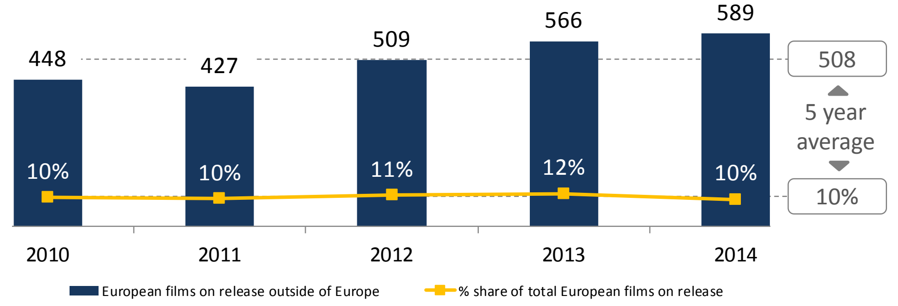


Figure 2 Admissions to European films outside Europe 2010-2014 (in mio, estimated)

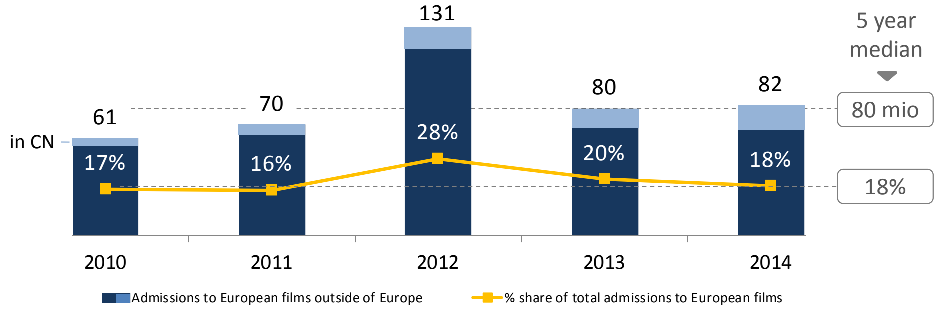
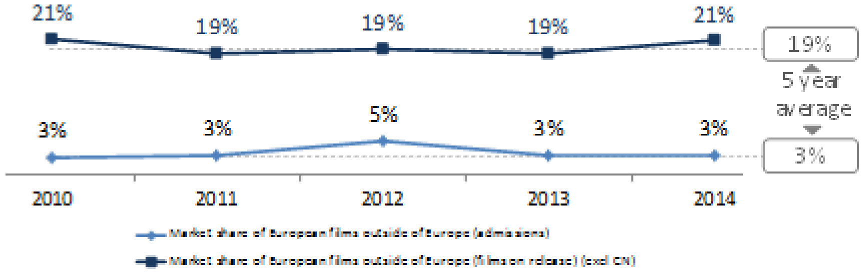


Figure 3 Market shares of European films outside Europe 2010-2014 (estimated)



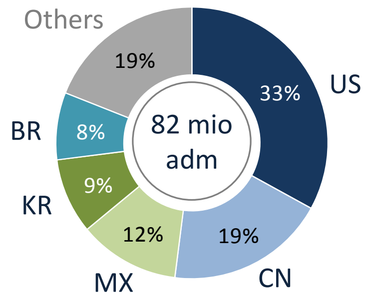
Source: European Audiovisual Observatory / LUMIERE, Rentrak, Oanda

North America was the largest market for European films outside Europe

The **North American market** proved to be **the most important "overseas" market for European films in terms of admissions**. In 2014 an estimated 27.4 and 3.4 mio tickets were sold to European films in the US and Canada respectively. The US market hence represents the single largest market for European films, accounting for 33% of total admissions to European films outside Europe, while the Canadian market accounted for 4%.

Despite the very limited number of European releases, **China** clearly came in as the **second largest market** for European films in terms of admissions with 15.5 mio tickets sold in 2014, accounting for 19% of total admission, followed by Mexico (12%), South Korea (9%) and Brazil (8%).

Figure 4 Admissions to European films 2014 - by market



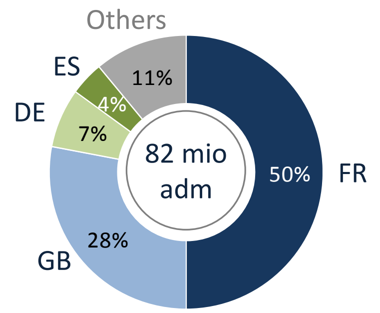
Source: OBS / LUMIERE, Rentrak

French and UK films cumulatively accounted for 80% of admissions to European films in 2014

Admissions to European films were rather concentrated with French and UK films cumulatively accounting for almost 80% of total admissions to European films outside Europe in 2014. **France** took **first rank** with French films cumulatively selling 41.2 mio tickets **accounting for 50% of total admissions** while **UK films**, which are traditionally strong in non-European markets, came in second place, with 22.9 mio admissions (**28% of total admissions** to European films).

German films followed at a distance, cumulatively selling 6.1 mio tickets in 2014 (7%). Then came along Spanish films (2.9 mio). Belgian, Italian, Russian and Danish films generated about 1.3 mio admissions ahead of Finnish (0.8 mio) and Irish films (0.7 mio).

Figure 5 Admissions to European films 2014 - by country of origin



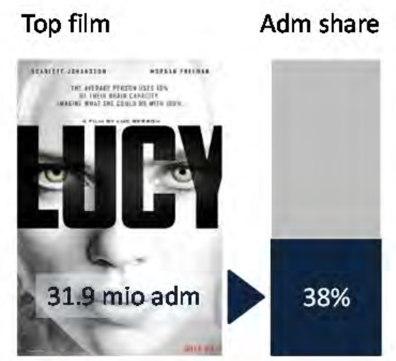
Source: OBS / LUMIERE, Rentrak

NB: Due to different methodologies data may differ from figures published by national sources

Lucy (FR) accounts for record share of 38% of total admissions to European films outside Europe

Luc Besson's English language Sci-Fi thriller ***Lucy* (FR)** clearly stood out as the most successful European film selling 31.9 mio tickets outside Europe in 2014, thus **accounting alone for 38% of total admissions** to European films **in the 12 non-European markets** covered. This is both the highest amount as well as the highest share in admissions of any European film in the past 5 years.

UK drama *Philomena* ranked second with 3.7 mio admissions ahead of the German English language animation *Tarzan* (3.3 mio), *The Theory of Everything* (GB, 3.2 mio) and *A Most Wanted Man* (GB, 2.4 mio)



THE BIG PICTURE

4 Theatrical Market Volume of European Films 2014

Total market volume obscure due to intransparent markets

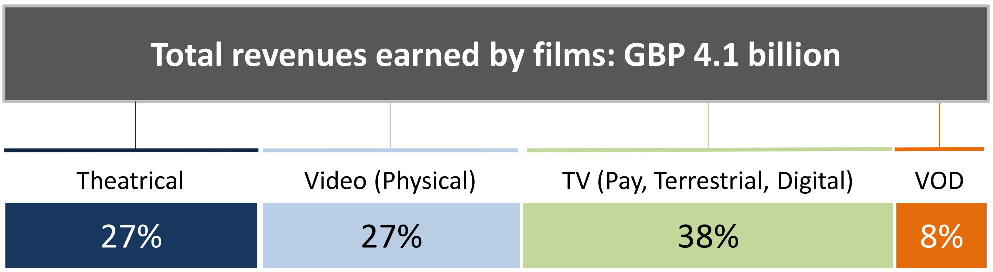
It is practically impossible to quantify the total market volume for theatrical films across their value chain. As set forth in the methodological remarks this is partly due to methodological challenges faced by the variety of business models through which theatrical films can be commercially exploited along the different windows. But methodological difficulties aside it is primarily the intransparency of certain market segments which makes it impossible to quantify related consumer expenditures.

Data only available for theatrical window which represents only a part of the total market

The theatrical cinema market is practically the only exploitation window for which reliable data are available. While in most countries data for the physical video, television and VOD markets are either not available at all or are sold at prohibitive prices which makes their tracking practically impossible for an organisation like the Observatory. As a consequence, **this report can only analyse the theatrical exploitation of European films.**

In the UK – which is one of the few countries in which consumer expenditures or retail equivalents – were measured for all market segments the data suggest that theatrical GBO accounted for 27% of total revenues in 2013, representing the third largest market segment behind TV (38%) and physical video sales and rentals which in 2013 were still slightly above box office levels (see Figure 6).

Figure 6 Breakdown of UK filmed entertainment market 2013
Breakdown of estimated revenues earned by film in the UK, whether UK or foreign films.



Source: BFI Statistical Yearbook 2014

Given the lack of data for other countries it is unclear to which extent the breakdown of the total film market volume in the UK is representative for other markets. Because of this and without reliable market share assumptions of European films within each of the different market segments in the other countries[2] it does not seem prudent to infer total market volume to European films worldwide by extrapolating the theatrical market's share in the UK. Figure 6 however clearly illustrates that the **theatrical exploitation window is only one out of four market segments**. As it is the only window for which data are publicly available **analysis of „film exports" generally focuses only box office** figures on foreign markets. It has however to be kept in mind that **non-theatrical exploitation windows** – even though not quantifiable in the research context at hand - **may provide relevant market potential** for European films outside Europe, as remarked e.g. by Michael Barker, Co-President of Sony Pictures Classics at the European Film Forum Conference in Cannes 2015.

[2] Data for the French market for instance suggest that the market share of French films is twice is high on the theatrical market than it is on the physical video market. Given the lack of data it remains unclear to which extent this is also true for the other countries covered in this report.

Theatrical market volume of European films worldwide in 2014

Market volume can be measured in terms of film offer, i.e. number of films on release, admissions and gross box office (GBO). Figure 7 overleaf provides a „big picture“ overview of the volume and breakdown of worldwide market volume to European films in 2014. As mentioned in the methodolog-ical remarks „worldwide“ refers to cumulative data for the 34 European and 12 non-European mar-kets covered in this report[3].

About 6 200 European films on theatrical release worldwide ...

Based on the title-by-title admissions data provided to the Observatory by Rentrak as well as national data providers a total of about **6 200 European films** could be identified as being **"on release",** i.e. selling at least one ticket for a theatrical screening in at least one of the markets covered., in 2014. This is the highest number tracked in the past five years.[4]

About half of these films were released in at least one non-national market. More or less all of these 3 200 "exported" films received a release on a non-national market within Europe, while **589** of them were **on release in at least one of the 12 non-European territories covered**. Thus, in 2014 **about 10%** of all **European films** on release were screened outside Europe. An estimated 73% of these 589 films were first releases (429 films), i.e. were released for the first time in at least one among the 12 non-European territories.

… generated an estimated total of 458 mio admissions and EUR 3.1 billion in GBO

As shown in Figure 7 overleaf, these 6 200 European films cumulatively generated **over 458 mio ticket sales** in the sample markets in 2014. Applying annual average ticket prices the Observatory estimates that European films took **roughly EUR 3.1 billion in gross box office.**

On a cumulative level, European films generated 60% of their total admissions on their respective national markets while theatrical exports, i.e. non-national admissions, accounted for about 40% of the overall admissions. Breaking non-national admissions further down, the data suggest that about 99 mio tickets were sold on non-national European markets while 82 mio tickets were sold to Euro-pean films in the 12 non-European markets covered.

Theatrical exploitation outside Europe represents significant share in market volume

These figures show that – though only 10% of the European films which were on release were "exported" to cinemas outside Europe – on a cumulative level theatrical exploitation outside Europe does contribute a significant share of the overall theatrical market volume of European films:

- About **18% of estimated worldwide admissions** to European films – or in other words, one out of five cinema tickets - were generated outside Europe.
- A**lmost half (45%) of total non-national admissions**, i.e. tickets sold outside films' national home markets, were generated outside Europe.

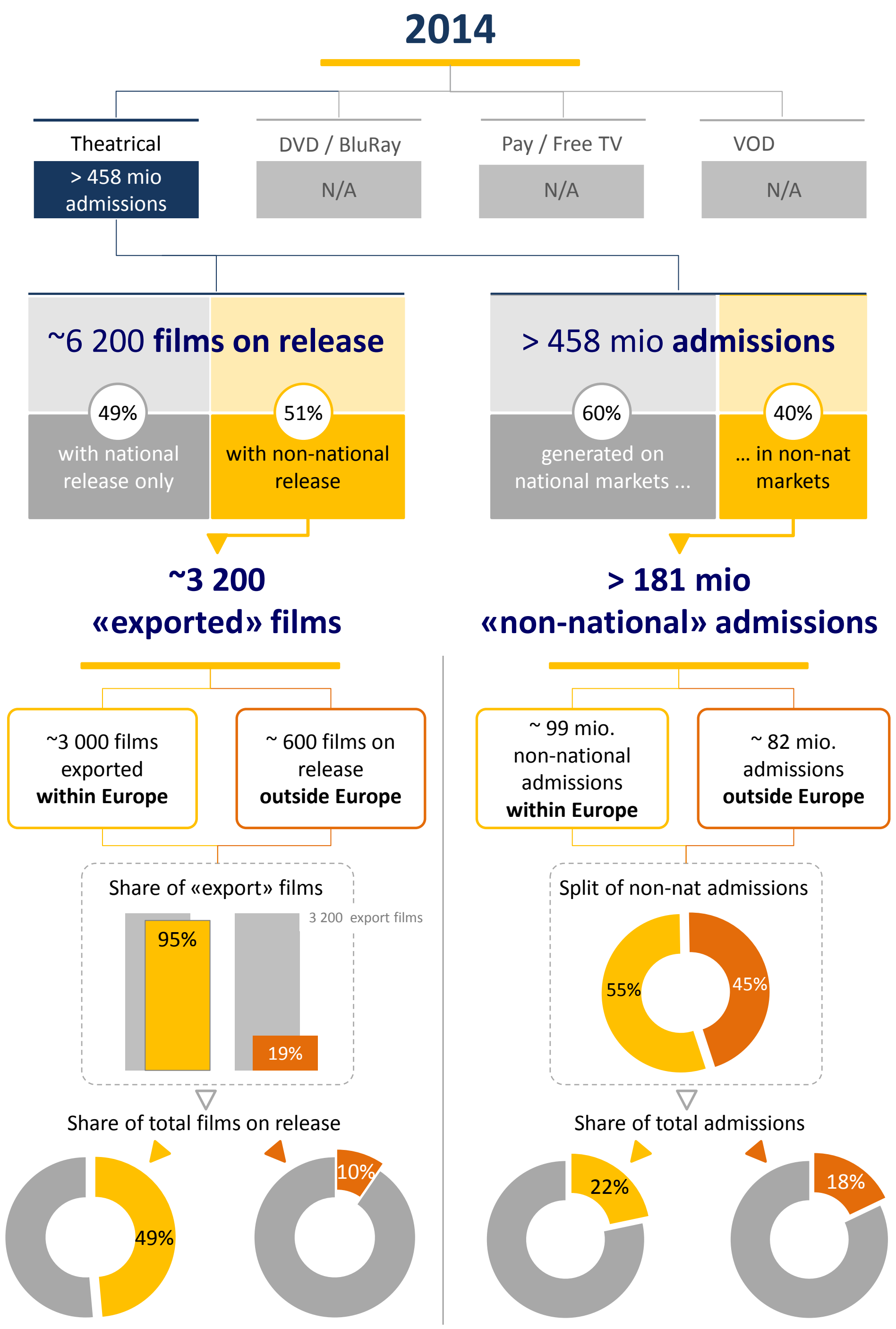
The remainder of this report will focus exactly on this part of the market as it provides a more detailed analysis of the circulation of European films outside Europe.

[3] See Chapter 2 for details on data sources and data scope.

[4] See Chapter 5.4 for further details.

Figure 7 At a glance: "Worldwide" theatrical market volume of European films in 2014

Figures may not sum to totals due to rounding.



Source: European Audiovisual Observatory / LUMIERE, Rentrak

5 Theatrical Market Volume Outside Europe 2014

5.1 Market Volume 2014

In terms of **films on release**

Important note: Given the methodological difficulties linked to classifying films by release type (first release, holdover, re-release, etc.)[5] the number of films "on release" serves as a key indicator in measuring the volume of European films in cinemas as it provides a methodologically consistent figure which allows the comparison over time. It should though be noted, that the number of films on release is directly linked to the coverage rate achieved by Rentrak in a specific market and year. Differing coverage rates can hence introduce a "technical bias" which can limit the ability to correctly identify trends over time. Given the lack of alternative data, the existence and / or extent of this bias cannot be evaluated by the Observatory[6].

About **600 European films were on release in cinemas outside Europe** in 2014. As specified in the methodological remarks, "on release" refers to films generating at least one cinema ticket sale in any of the 12 non-European sample markets as tracked by Rentrak. This includes first releases as well as holdovers, re-releases and festival or other screenings in commercial cinemas.

As shown in Figure 8 overleaf, the number of European films on release **differs between the continental regions**: 318 in Latin America, 218 in North America, 155 in China & South Korea and 126 in Australia & New Zealand. This illustrates the fact that **almost four out of five of these films were on theatrical release in only one or two non-European markets** and only very few European films were on release in the majority of the non-European markets covered in this report [7].

In terms of **first releases**

Important note: As specified in the methodological remarks "first releases" refer to films with a proper commercial release in any specific year in a given territory. Apart from the difficulties linked to defining and identifying a "proper commercial release" there are methodological issues when it comes to defining a "first release" on a multi-territory basis. In chapter 2 two definitions are introduced: a "*wide definition"* (Films which were first released in at least one non-European market in a specific year) and a *"narrow definition"* (Films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before). Which of the two definitions is more appropriate may differ depending on the research question to be analysed.

Applying the **wide definition of a "first release"** an estimated **429 European films premiered** in cinemas in 2014 in at least one of the 12 non-European markets covered in the data sample. That means that practically **three out of four (73%) European films on release outside Europe** in 2014 were released for the first time in at least one of the sample markets. This wide definition is the appropriate methodological choice in relation to measuring admissions generated by first releases as it corresponds to the number of films that generated these "first release admissions" in the various territories.

The number of first releases is naturally lower when applying the **narrow definition**. In that case an **estimated 300 European films were released for the first time outside Europe.** In other words, about 50% of the European films on release had never been released in cinemas in any of the 12 non-European sample markets before 2014.

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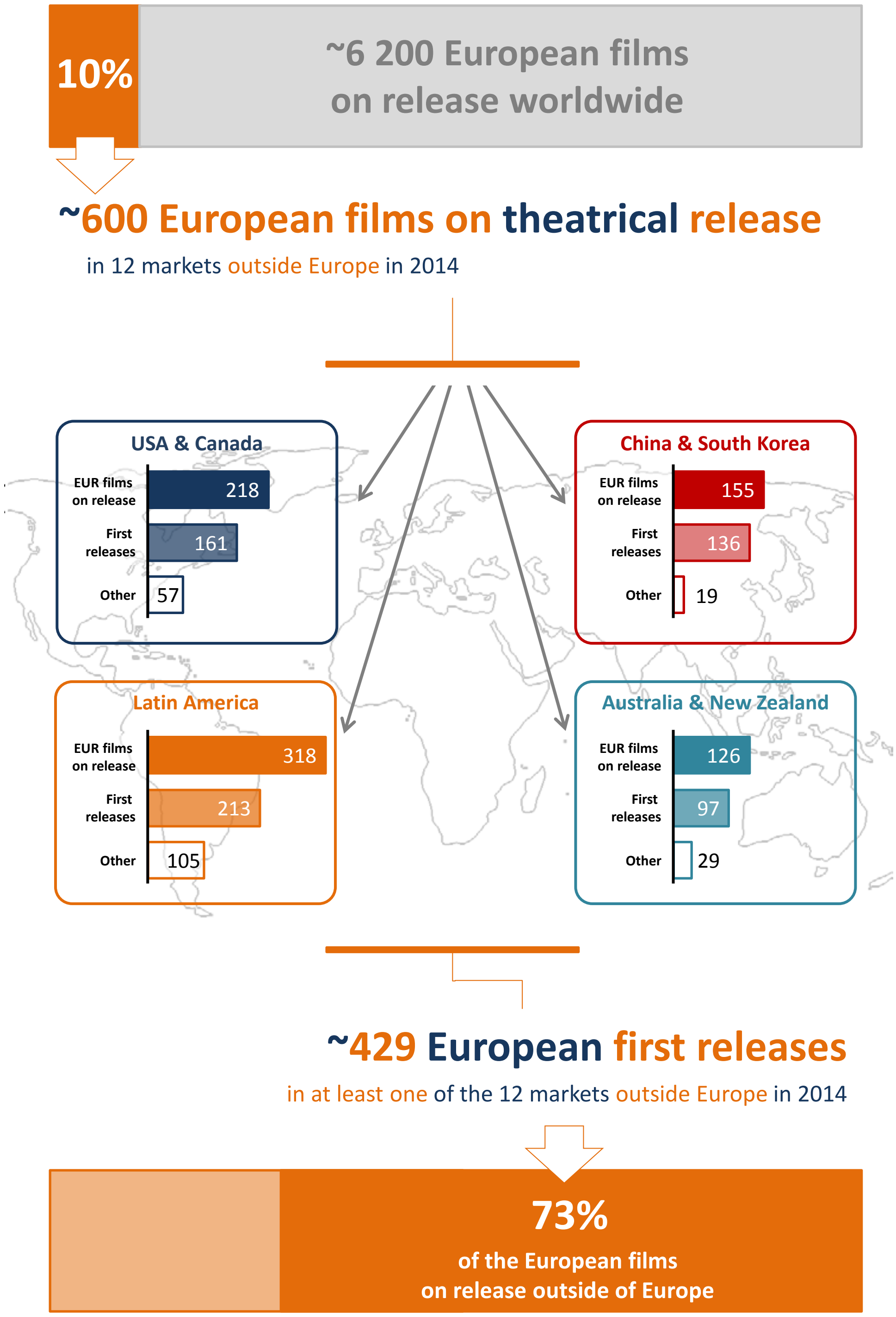
[5] See methodological remarks and definitions in chapter 2 for further details.
[6] See appendix for details on the coverage rates for all markets by year.
[7] See chapter 9 for further details on the distribution of European films on non-European release markets.

Figure 8 **Number of European films releases outside Europe in 2014**

Figures may not sum to totals due to rounding.



Source: European Audiovisual Observatory / LUMIERE, Rentrak

In terms of **admissions**

In 2014 **European films generated over 82 mio ticket sales in** the 12 **non-European markets** covered. This means that at least 18% of total worldwide admissions to European films occurred outside Europe. The vast **majority** of these admissions were **for first releases**, which cumulatively accounted for 93% of total admissions outside Europe (see Figure 9).

With 30.7 mio admissions **North America** remains the **largest market for European films** outside Europe accounting for 37% of total admissions in non-European markets, as shown in Table 1 below. In 2014, for the first time, figures from the Chinese market could be included in the analysis, revealing that the two Asian markets for which data are available – China and South Korea – cumulatively represent the second-largest market region for European films, with 23.4 mio admissions (29%), slightly ahead of Latin American markets (21.2 mio, 26%).

In terms of **GBO**

Important note: As mentioned in the methodological remarks in chapter 2 LUMIERE only covers admissions but no gross box office data. However in order to provide a ballpark figure in the context of this report, GBO figures are estimated by multiplying the average ticket price in a specific market with admissions generated in that market. These estimates will naturally deviate from actual GBO takings and have to be considered as **rough estimates**.

Applying average ticket prices for the individual markets, it emerges that European films generated an estimated **gross box office (GBO)** of about **EUR 496 mio outside Europe** (see Table 1). This means that cumulatively European films earned an estimated 16% of their "worldwide" box office in 2014 outside Europe.

The importance of the North American market for European films is even more pronounced in terms of box office takings, accounting for 45% of total non-European GBO (EUR 222 mio). China and South Korea contributed about one quarter of total GBO. In Latin American sample markets, where three times as many tickets as in Oceania were sold, GBO takings (EUR 80 mio, 16%) were only slightly higher than in Oceania (EUR 67 mio, 14%) due to lower ticket prices.

Table 1 Admissions & GBO generated by European films outside Europe by region 2014

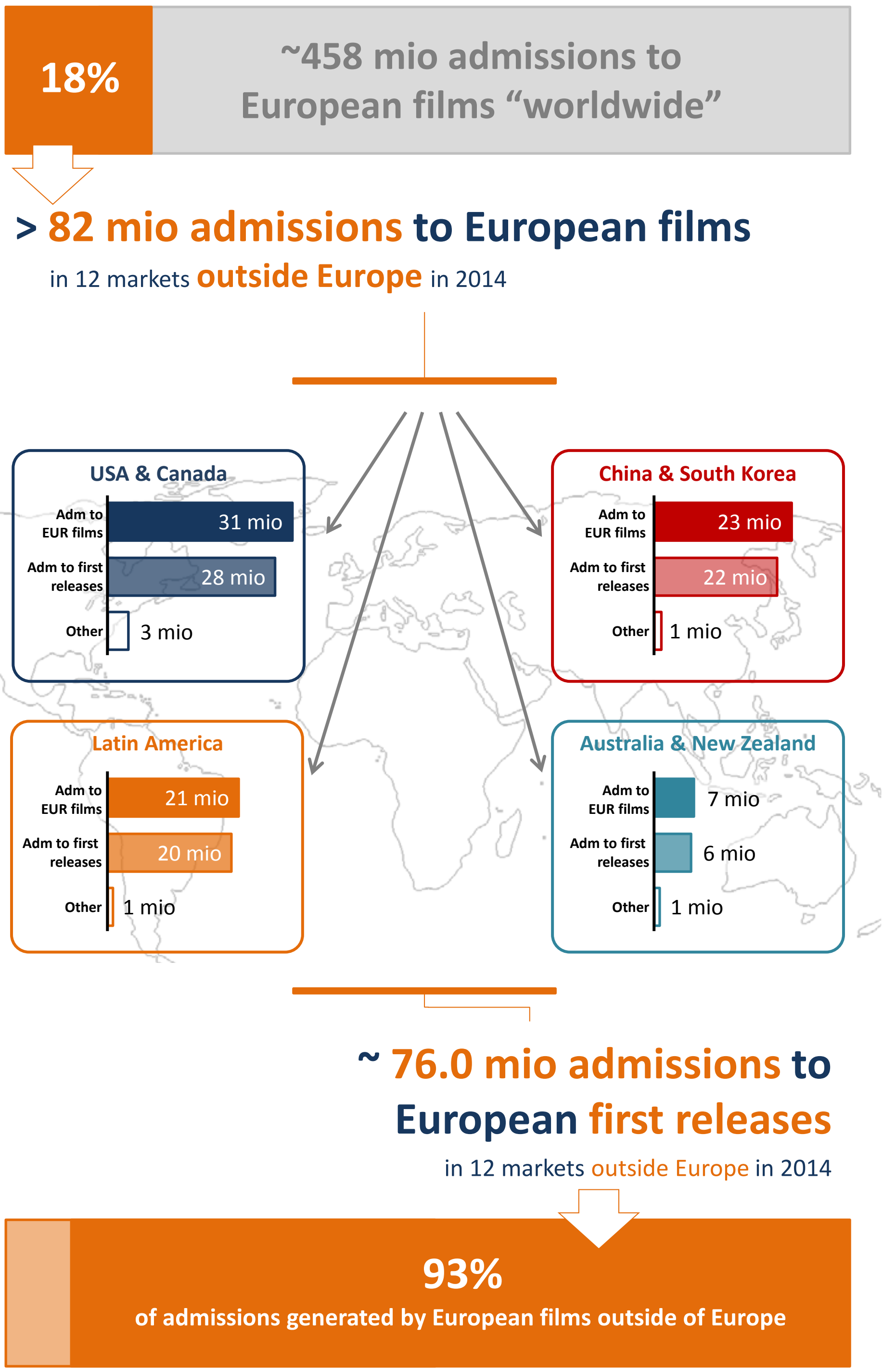
Estimates based on annual average exchange rates.

Rank	Region	Admissions (in mio)	% Share	GBO est (in MEUR)	% Share
1	US & Canada	30.7	37%	222	45%
2	China & Korea	23.4	29%	126	26%
3	Latin America	21.2	26%	80	16%
4	Australia & New Zealand	7.0	9%	67	14%
	Total	**82.0**	**100%**	**496**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak, Oanda

Figure 9 Admissions to European films outside Europe in 2014

Figures may not sum to totals due to rounding.



Source: European Audiovisual Observatory / LUMIERE, Rentrak

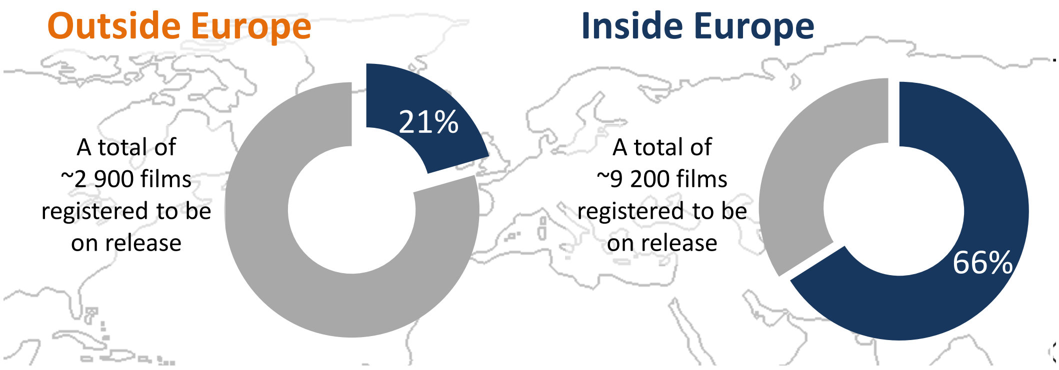
5.2 Market Share of European films in 2014

In terms of **films on release**

Important note: As mentioned in the methodological remarks in Chapter 2 the number of films on release is an indicator which is directly linked to the coverage rates of individual markets which can significantly limit the direct comparability of this indicator across different territories or regions. For instance, the magnitude of the difference between European and non-European market with regard to the number of films identified as on release suggests that this indicator is probably not directly comparable in absolute terms. However, assuming that the proportional share by origin of films identified resembles the proportional distribution of films not identified in certain markets, the percentage share of European films can be considered to be a valid indicator when estimating the share of European films as portion of the total number of theatrical films on offer.

Measured in terms of **films on release**, European films accounted for **21%** of the approximately 2 900 films reported to have been screened at least once **in the 12 non-European markets** in 2014. In other words, one out of five films on release outside Europe in 2014 was of European origin. In contrast, presumably due to a more comprehensive coverage for certain European markets, the LUMIERE database identified over 9 200 films on release **in Europe** in 2014. European films accounted for **66%** of these films (see Figure 10).

Figure 10 Market share of European films in terms of films on release - 2014 (estimated)



Source: European Audiovisual Observatory / LUMIERE, Rentrak

As illustrated in Table 2 overleaf, the share of European films in the tracked film offering is fairly comparable from region to region, ranging between 24% in North and Latin America and 22% in Australia & New Zealand. Only Asia, represented by China and South Korea, stands out with a comparatively low share of European films due to the low number of European films with a theatrical release in China, as will be further elaborated in Chapter 6.

More than half of all films tracked in „world"-sample were produced in Europe

This would suggest that an estimated 57% of the films screened in cinemas on the 45 sample markets worldwide were of European origin. In other words, more than every second film on release in 2014 was a European film. As noted in the methodological remarks, the number of films on release is the most basic indicator for measuring the theatrical film offering in a country. It does not provide any information about the actual availability of a film - which depends entirely on the number of screens the film is shown on and the frequency of screenings, as well as the number of days / weeks it remains in cinemas. These data could however not be analysed within the scope of this report. It must also be pointed out that the share of European films would be significantly lower if data for India and Japan were taken into account.

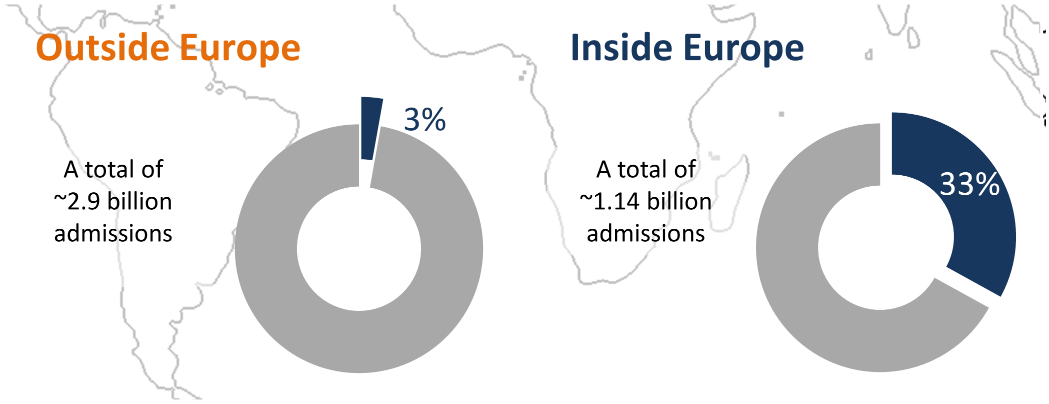
In terms of **first releases**

Outside Europe, European **first releases** accounted for around **20%** of the 2 157 films which were estimated to have been theatrically released for the first time in at least one[8] of the 12 non-European markets covered. Applying the narrow definition, i.e. treating a region as one single market, the percentage share of European first releases drops to 16%.

In terms of **admissions**

With 82 mio admissions generated in 2014 European **films** accounted for around **3%** of the cumulative 2.9 billion admissions generated by all films **in the 12 non-European markets** covered in this report. **In comparison,** European films claimed a **record market share in Europe,** generating over 376 mio ticket sales in 2014. This represents an estimated market share of **33%** of total admissions as captured in the LUMIERE database for 34 European markets.

Figure 11 Market share of European films in terms of admissions - 2014 (estimated)



Source: European Audiovisual Observatory / LUMIERE, Rentrak

The market share of European films in terms of admissions ranges between 2% in North America and Asia, and 4% and 8% in Latin America and Oceania, respectively (see Table 2). Admission figures and market shares in individual territories are shown in chapter 6.

Table 2 Market share of European films by region – 2014 (estimated)

Rank	Region	Market Share Film Offer	Market Share Admissions
1	Europe	66%	33%
2	US & Canada	24%	2%
3	Latin America	24%	4%
4	China & Korea	16%	2%
5	Australia & New Zealand	22%	8%
	Total „world“	**57%**	**11%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

[8] This figure is based on the „wide“ definition of a „first release“ (see methodological remarks in Chapter 2).

5.3 Five-Year Context: 2010-2014

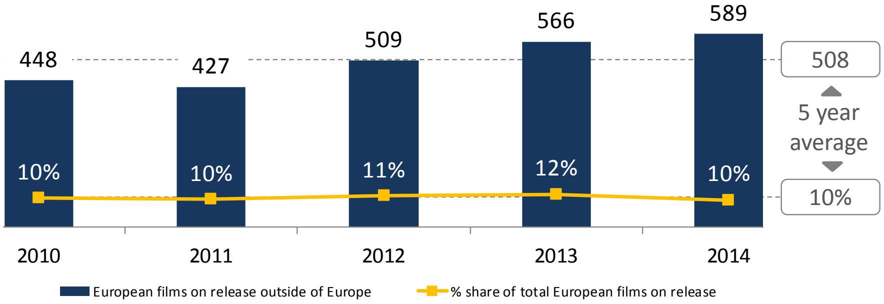
This chapter shows headline figures for film releases, admissions and market shares in their five-year context. More detailed time series for these and additional indicators in the individual non-European markets are shown in the appendix.

Number of European films on release increases in 2014

The number of European films which were on release outside Europe has been **growing consistently since 2011**. In 2014 European **release figures** reached a **temporary record high** of 589 European films tracked by Rentrak **in 2014** (see Figure 12). This is well above the five-year average of 508 films on release. The fact that only 2014 data are available for the Chinese market does not limit the comparability of the number of films on release due to the low number of European films which were only on release in China (9 films). The number of European films on release also increased within Europe, growing from about 4 500 films in 2010 to almost 6 200 films in 2014[9]. The percentage share **of European films with a release outside Europe** consequently remained stable at around **10%**. In this respect the 2014 results are exactly in line with the five year average.

The growth in the number of European films on release seems to stem from an increasing number of holdovers and/or re-releases rather than an increase in European first releases. As shown in table 3, the estimated number of European first releases in 2014 was actually below the five year average.

Figure 12 Number of European films on release outside Europe 2010 – 2014 (estimates)



Source: European Audiovisual Observatory / LUMIERE, Rentrak

Table 3 Number of European films on release 2010 – 2014 (estimates)

	2010	2011	2012	2013	2014	*Avg*
Total	**4 474**	**4 469**	**4 730**	**4 916**	**6 188**	***4 955***
In Europe	4 385	4 384	4 622	4 762	6 061	*4 843*
Outside Europe	448	427	509	566	589	*508*
% share Outside Europe	10%	10%	11%	12%	10%	*10%*
First releases (wide)	*448*	*399*	*474*	*525*	*429*	*455*
First releases (narrow)	*242*	*285*	*340*	*358*	*300*	*305*

Source: European Audiovisual Observatory / LUMIERE, Rentrak

9 This figure has to be interpreted with caution as it can't be established with certainty to which extent the sharp increase in 2014 was caused by an increase in coverage and to which extent it reflects an actual increase in the number of films on release.

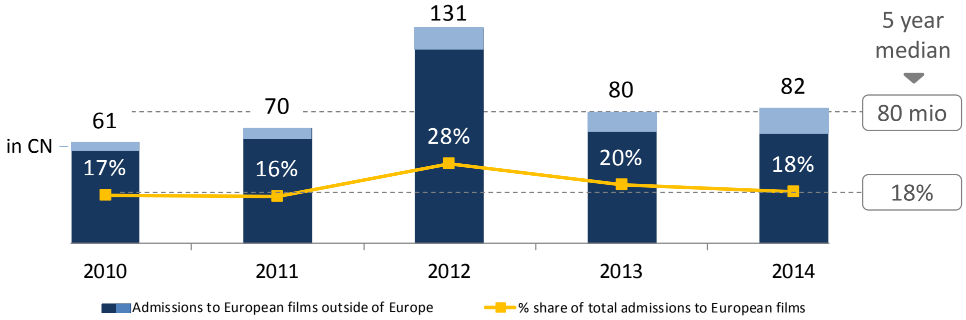
2014 admission level in line with five-year average

The increasing number of European film releases outside Europe is thus far not translating into a corresponding growth trend in admissions. Leaving the exceptionally good 2012 results[10] aside, the figures suggest a **modest growth trend** with admissions increasing from 61.0 mio in 2010 to 82.0 mio in 2014. In the context of the past five years, **2014 results** are hence only marginally above the **median value** as illustrated in Figure 13. Please note that these values are **pro-forma estimates** for cumulative admissions in all 12 non-European markets as reported by Rentrak in 2014[11]. Abstracting figures for the Chinese markets reveals that this seeming **growth trend** is **entirely linked to the assumed growth** in admissions **on the Chinese market** whereas admissions in other non-European markets actually marginally decreased year-on-year in 2014 as indicated in Table 4.

With 18% of total „world“ admissions generated outside Europe the 2014 share is lower than in the two preceding years but slightly higher than before 2012.

Figure 13 Admissions to European films outside Europe 2010 – 2014 (in mio, estimated)

Pro-forma estimates for cumulative admissions in all 12 non-European sample markets.



Source: European Audiovisual Observatory / LUMIERE, Rentrak

Table 4 Admissions to European films 2010 – 2014 (in mio, estimated)

	2010	2011	2012	2013	2014	*Median*
Total "world"	**364.6**	**426.4**	**474.0**	**397.3**	**458.4**	**426.4**
In Europe	303.6	356.7	343.1	317.3	376.3	343.1
Outside Europe (incl CN)	*61.0*	*69.7*	*130.9*	*80.0*	82.0	80.0
- % share Outside Europe	17%	16%	28%	20%	18%	*18%*
- Admissions in China (CN)	*4.7*	*7.1*	*13.4*	*12.2*	15.5	*12.2*
- % of Outside Europe	*10%*	*8%*	*10%*	*15%*	19%	*10%*
Outside Europe (excl CN)	56.3	62.6	117.5	67.7	66.5	*66.5*

Source: European Audiovisual Observatory / LUMIERE, Rentrak

[10] 2012 clearly stands out as a year with exceptionally good results for European films outside Europe as a total of six European films succeeded in generating more than 5 mio admissions [*Taken 2* (26.8 mio), *Les Misérables* (15 mio), *The Woman in Black* (10.6 mio), *Intouchables* (7.3 mio), *The Artist* (6.7 mio), *The Iron Lady* (5.6 mio)] while in other years only 1 to 3 films managed to surpass this benchmark.

[11] Pro-forma estimates for admissions to European films in China for the years 2010 to 2013 are based on the European market share in China in 2014 and are adjusted for Chinese market growth and relative performance of European films in the other non-European markets in each year. The accuracy of these estimates could not be validated due a a lack of data.

Market share of European films outside Europe stable

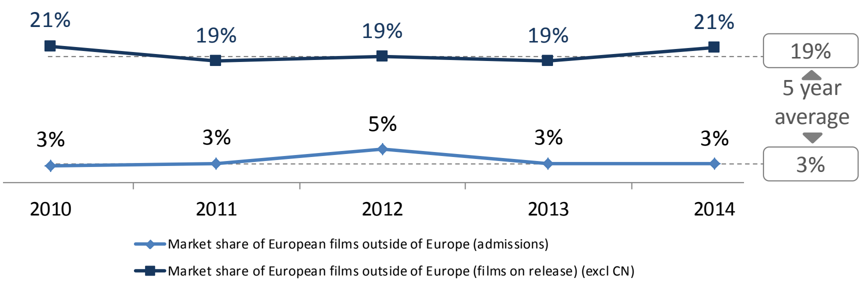
The market share of European films outside Europe – both in terms of number of films on release and admissions has remained fairly stable over the past five years and **2014 results are more or less in line with five-year average values.**

In terms of the number of films tracked as on release in the 12 non-European markets, European films accounted for 21% in 2014. Though the second highest level in the past five years, this is only slightly above the five-year average value of 20%. Pro-forma calculations excluding China show a slightly increased share of 23% for European films (see Table 5).

In terms of the admissions share, European films generally accounted for 3% of the total number of cinema tickets sold in the 12 non-European markets covered. The 2014 market share is hence exactly in line with the five-year average value.

Figure 14 Market share of European films outside Europe 2010 – 2014

Estimated percentage share of number of films on release / admissions in 12 markets covered.



Source: European Audiovisual Observatory / LUMIERE, Rentrak

Table 5 Market share of European films in terms of films on release 2010 – 2014 (estimated)

	2010	2011	2012	2013	2014	*Average*
Total	**61%**	**60%**	**58%**	**56%**	**57%**	**58%**
In Europe	68%	69%	69%	67%	66%	68%
Outside Europe (incl CN)	*21%*	*19%*	*19%*	*19%*	21%	20%
Outside Europe (excl CN)	25%	22%	22%	21%	*23%*	22%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Table 6 Market share of European films in terms of admissions – 2010 – 2014 (estimated)

	2010	2011	2012	2013	2014	*Average*
Total	**10%**	**12%**	**12%**	**10%**	**11%**	**11%**
In Europe	26%	31%	30%	28%	33%	29%
Outside Europe (incl CN)	3%	3%	5%	3%	2%	3%
Outside Europe (excl CN)	3%	3%	6%	3%	3%	4%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

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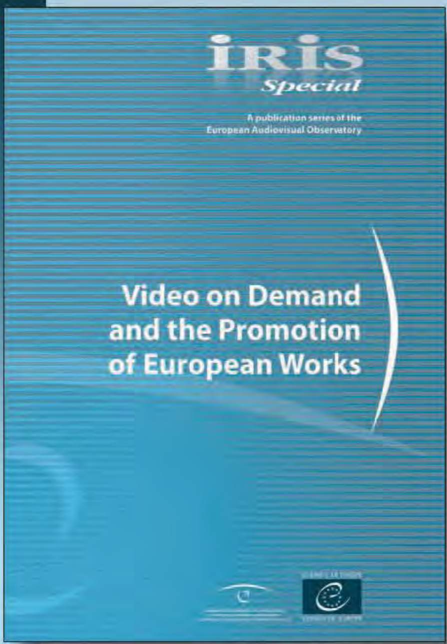

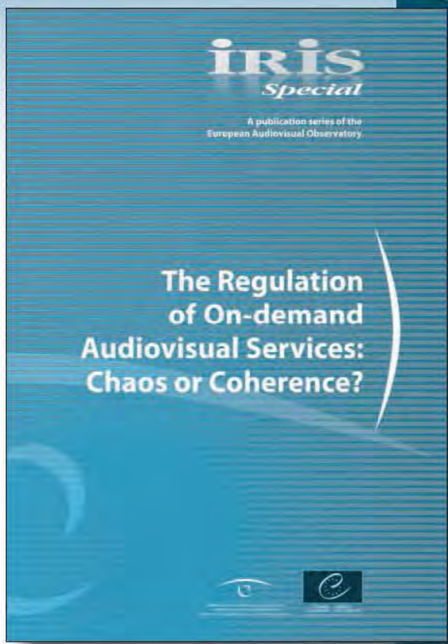

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BREAKING IT DOWN …

6 In Which Markets Outside Europe Were European Films Successful in Cinemas?

6.1 What were the most important theatrical export markets in 2014?

In terms of **number of releases**

As can be seen in Table 7, the largest number of European **first releases**[12] outside Europe was released in the US (133 premieres) and South Korea (126 premieres). The three largest Latin American markets, Mexico, Brazil and Argentina as well as Australia and Canada proved to be the second most important group of markets with 70 to 90 European first releases in 2014. The strongly regulated Chinese market clearly stands out as the market with the lowest number of European film releases (17 first releases).

Given the comparatively low number of holdovers / re-releases / on-demand screenings / festival releases etc. tracked in the data set[13], the picture is quite similar with regard to the total number of **films on release:** the US market stands out with 188 European films on release, followed by four markets with 110 to 140 and another four markets with 70 to 90 European films on release.

Table 7 Number of European film releases outside Europe 2014

As tracked in LUMIERE. Ranked by the number of first releases.

#	Market	First releases (estimated)	Other releases[1)] (estimated)	Films on release
1	US – USA	133	55	188
2	KR – South Korea	126	16	142
3	BR – Brazil	92	52	144
4	AU – Australia	85	25	110
5	MX – Mexico	80	50	130
6	CA – Canada	72	22	94
7	AR – Argentina	68	19	87
8	CO – Colombia	61	33	94
	NZ – New Zealand	61	11	72
10	CL – Chile	32	8	40
11	VE – Venezuela	20	3	23
12	CN – China	17	5	22
	Total	**429**	**160**	**589**

1) "Other releases" include holdovers, re-releases, "on-demand" screenings, festival screenings, etc. ("repertoire films")

Source: European Audiovisual Observatory / LUMIERE, Rentrak

12 Please refer to the methodological remarks and data scope sections in Chapter 2 for caveats regarding the coverage and interpretation of data concerning the classification of release types.

13 Which can either indicate a lower offer of "repertoire" films outside of Europe and / or less comprehensive coverage of these films with regard to data collection.

In terms of **admissions**

The **North American market** is also **by far the most important overseas market for European films in terms of admissions**. In 2014 an estimated 27.4 and 3.4 mio tickets were sold to European films in the US and Canada respectively. The US market hence represents the single largest market for European films, accounting for a third of total admissions to European films outside Europe. The Canadian market accounted for 4%, so that cumulatively 37% of total non-European admissions were generated in the US and Canada (see Table 8).

Despite the very limited number of European releases there, **China** clearly came in as the **second largest market** for European films in terms of admissions with 15.5 mio tickets sold in 2014, accounting for 19% of total admissions to European films in the 12 markets covered. **Mexico, South Korea, Brazil** and **Australia** follow with admissions between 5.9 and 9.5 mio while European films sold two mio or fewer tickets in the remaining four Latin American markets and New Zealand.

In terms of **GBO**

Thanks to a comparatively **high average ticket price,** the **importance of the North American market** is even **more pronounced** in terms of gross box office takings. Based on the data available, the Observatory estimates that European films took EUR 197 mio and EUR 24 mio at the US and Canadian box offices respectively, accounting for a **cumulative 45%** of total non-European GBO takings. In other words, almost every other Euro grossed by European films outside Europe was earned in the two North American markets.

About EUR 80 mio were generated in China, followed by Australia (EUR 58 mio) and South Korea (46 mio) as shown in Table 8 below.

Table 8 Admissions & GBO for European films outside Europe 2014

In mio. Ranked by admissions. GBO estimated based on average ticket prices.

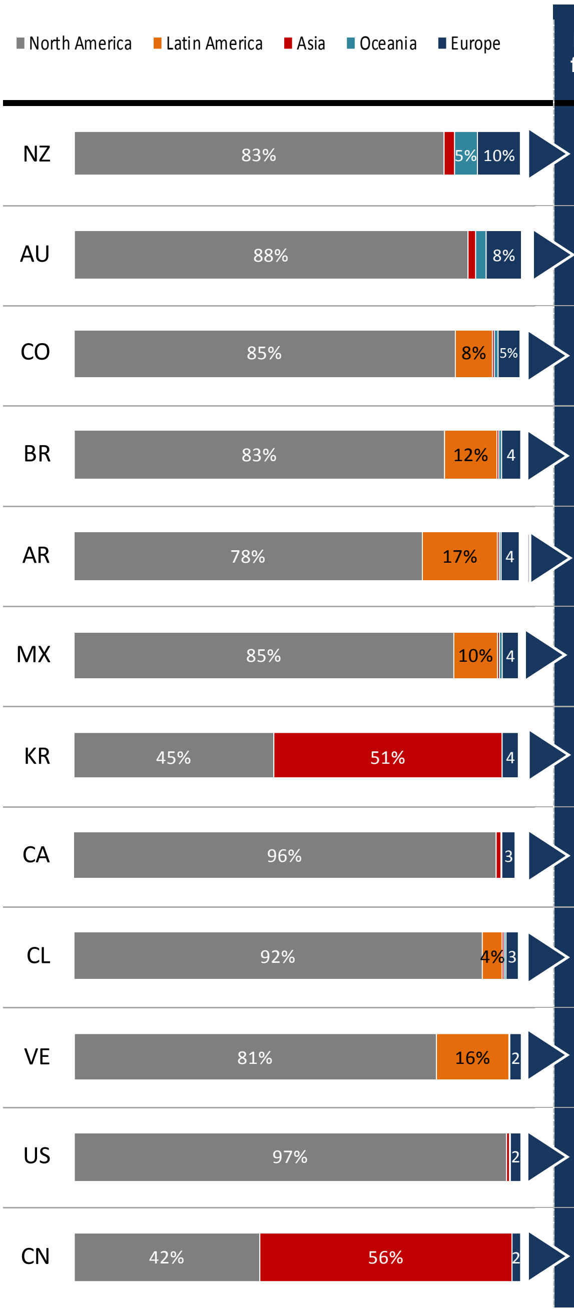
#	Market	Adm to First Releases	Adm to Other Releases	Total Adm	%	GBO (in MEUR)	%
1	US - USA	24.6	2.8	27.4	33%	197	40%
2	CN - China	15.5	0.0	15.5	19%	80	16%
3	MX - Mexico	8.9	0.6	9.5	12%	30	6%
4	KR - South Korea	6.6	0.9	7.5	9%	46	9%
5	BR - Brazil	6.0	0.4	6.4	8%	30	6%
6	AU - Australia	5.2	0.7	5.9	7%	58	12%
7	CA - Canada	3.1	0.3	3.4	4%	24	5%
8	CO - Colombia	2.2	0.0	2.2	3%	8	2%
9	AR - Argentina	1.7	0.0	1.7	2%	8	2%
10	NZ - New Zealand	0.9	0.2	1.1	1%	9	2%
11	VE - Venezuela	0.7	0.1	0.7	1%	1	0%
12	CL - Chile	0.6	0.0	0.6	1%	3	1%
	Total	**76.0**	**6.0**	**82.0**	**100%**	**496**	**100%**

Source: European Audiovisual Observatory, Rentrak

6.2 Where did European films generate the highest market share?

Figure 15 **Market shares in terms of admissions - by region / country of origin 2014** (estimated)

Markets ranked by market share of European films.



	EUR films	FR	GB	DE	ES	BE	IT	RU	Other
NZ	10%	15%	70%	4%	-	3%	1%	-	7%
AU	8%	26%	58%	4%	-	5%	1%	-	6%
CO	5%	43%	23%	7%	12%	2%	2%	-	11%
BR	4%	47%	13%	17%	3%	6%	4%	-	10%
AR	4%	34%	28%	11%	9%	-	11%	-	7%
MX	4%	45%	22%	15%	10%	-	3%	-	5%
KR	4%	41%	14%	21%	4%	4%	1%	8%	6%
CA	3%	61%	30%	2%	-	-	3%	-	3%
CL	3%	43%	32%	7%	14%	-	3%	-	1%
VE	2%	30%	30%	21%	16%	-	-	-	2%
US	2%	53%	40%	1%	0%	0%	1%	-	4%
CN	2%	67%	9%	5%	5%	1%	-	4%	9%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

7 What Were the Leading European Film Export Countries?

Important note: As specified in the methodological remarks, this report focuses on providing a „big picture" overview of the circulation of European films as a whole rather than analysing the film exports of individual European countries which is beyond the scope of this report as it may require different – sometimes country specific – methodological choices. Please note that in particular because of the Observatory's choices regarding the allocation of a unique country of origin based on the majority financing share as well as the exclusion of films financed with incoming foreign investment the country specific data presented in this report, and in particular in this chapter, may differ significantly from data published by national sources such as the BFI or UniFrance. For a proper analysis of the export of films originating from a specific country, please refer to national sources.

In terms of **releases**

In 2014, as past years, **France and the UK "exported" by far the largest number of films** to non-European territories among the European countries. As shown in Table 9, France leads both in terms of first releases as well as total films on release with 123 French films released throughout the year and a total of 183 French films on release in at least one of the 12 non-European markets covered in this report. France is followed by the UK with 89 first releases outside Europe and a total of 120 films on release. On a cumulative basis French and UK films accounted for 51% of the total number of European films on release outside Europe. In other words **one out of two European films screened outside Europe in 2014 were majority produced in either France or the UK.**

Spain ranked third in 2014 with 52 first releases and a total of 63 films on release, followed by Germany and Italy with 37 and 17 first releases, respectively, and a total 49 and 31 films on release respectively. In addition, three Scandinavian countries (Denmark, Norway, Sweden) as well as Russia and Switzerland made it onto the top 10 list of European film export countries with 11 to 15 films on release outside Europe in 2014.

On a cumulative level the top 10 European countries accounted for 87% of the total number of European films on release outside Europe. The complete list of European film releases outside Europe by country of origin can be found in the appendix.

Table 9 Top 10 European film "exporting" countries by film releases outside Europe 2014

Ranked by number of films on release as tracked in LUMIERE.

Rank	Country of origin	First releases (estimated)	Other releases (estimated)	Films on release	% share
1	FR – France	123	60	**183**	**31%**
2	GB – UK	89	31	**120**	**20%**
3	ES – Spain	52	11	**63**	**11%**
4	DE – Germany	37	12	**49**	**8%**
5	IT - Italy	17	14	**31**	**5%**
6	DK – Denmark	11	4	**15**	**3%**
7	RU – Russia	11	3	**14**	**2%**
8	NO – Norway	12	1	**13**	**2%**
9	CH – Switzerland	7	4	**11**	**2%**
	SE - Sweden	10	1	**11**	**2%**
	Other 21 countries	60	19	**79**	**13%**
	Total Europe	**429**	**160**	**589**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

In terms of **admissions**

The picture appears even more concentrated when it comes to admissions generated by European films: On a cumulative level French and UK films accounted for almost 80% of total admissions to European films outside Europe in 2014.

Primarily thanks to the success of Luc Besson's English-language actio-thriller *Lucy* (FR) which generated 31.9 mio ticket sales outside Europe in 2014, **France** took **first rank** with French films cumulatively selling 41.2 mio tickets **accounting for 50% of total admissions** to European films in the 12 non-European markets covered in this report (see Table 10).

UK films, which are traditionally strong in non-European markets, came in second place, with 22.9 mio admissions (**28% of total admissions** to European films). Successful UK productions included *Philomena* (3.7 mio), *The Theory of Everything* (3.2 mio), *A Most Wanted Man* (2.4 mio), *Paddington* (2.3 mio) and *The Quiet Ones* (1.8 mio).

France and the UK were followed at a distance by Germany whose productions cumulatively generated 6.1 mio ticket sales in 2014 (7%), led by the international success of the animation film *Tarzan,* which sold 3.3 mio tickets outside Europe and became the third most successful European film outside Europe in 2014. Following Spain (2.9 mio admissions), Belgian, Italian, Russian and Danish films drove about 1.3 mio admissions ahead of Finnish (0.8 mio) and Irish films (0.7 mio).
The complete list of admissions to European films outside Europe by country of origin can be found in the appendix, and a list of the top 100 European films in terms of admissions generated outside Europe in 2014 is shown in Chapter 10.

Table 10 Top 10 European film "exporting" countries by admissions outside Europe 2014
In mio. Ranked by total admissions as tracked in LUMIERE.

Rank	Country of origin	Admissions to first releases	Admissions to other releases	Total admissions	% share
1	FR – France	41.0	0.2	**41.2**	**50%**
2	GB – UK	22.7	0.2	**22.9**	**28%**
3	DE – Germany	6.1	0.0	**6.1**	**7%**
4	ES – Spain	2.9	0.0	**2.9**	**4%**
5	BE – Belgium	1.3	0.0	**1.3**	**2%**
6	IT – Italy	1.2	0.1	**1.3**	**2%**
7	RU – Russia	1.3	0.0	**1.3**	**2%**
8	DK – Denmark	1.3	0.0	**1.3**	**2%**
9	FI – Finland	0.8	0.0	**0.8**	**1%**
10	IE – Ireland	0.7	0.0	**0.7**	**1%**
	Other 21 countries	2.3	0.0	**2.3**	**3%**
	Total Europe	**81.5**	**0.5**	**82.0**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

In terms of **"importance" of non-European markets**

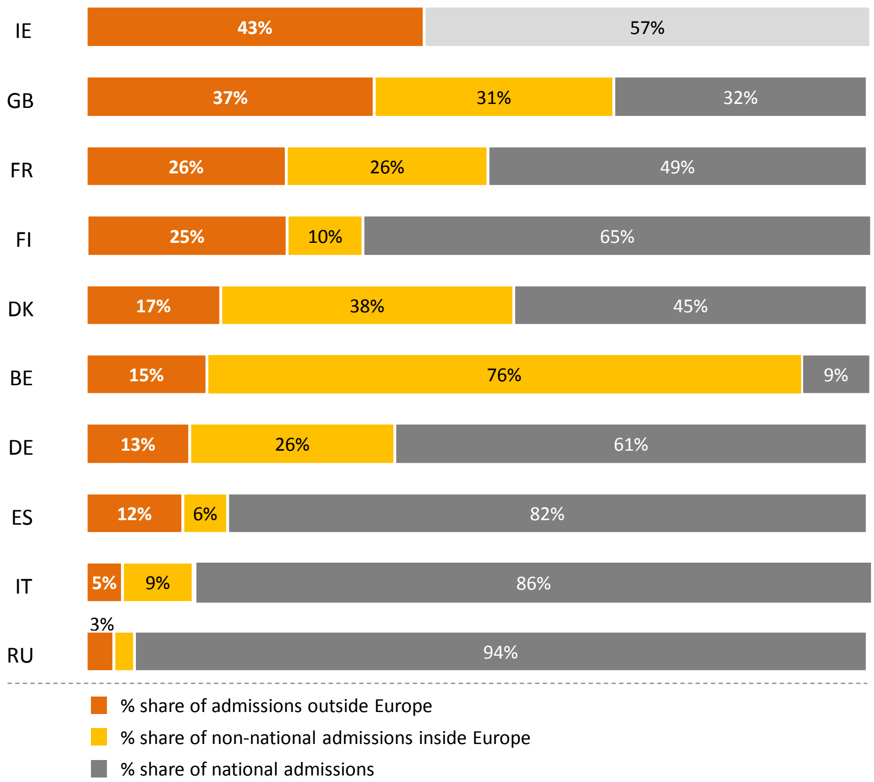
How important are admissions outside Europe for the various European countries? Figure 16 shows the percentage shares of admissions in national, non-national European and non-European markets for each of the top 10 European film exporting countries in terms of admissions outside Europe as identified in Table 10 on the previous page. The complete breakdown for all European films can be found in the appendix.

In 2014, four out of the top 10 European film exporting countries generated 25% or more of their total theatrical admissions on the 12 non-European markets covered in this report. The Irish and the UK film industries clearly were most "exposed" to the distribution of their films outside Europe with an estimated 43% and 37% of total admissions to Irish and British films generated outside Europe. The international success of *Lucy (FR)* and the Finnish animated family film *Niko 2 – Little Brother, Big Trouble: A Christmas Adventure (FI)* helped French and Finnish films generate about a quarter of their "worldwide" admissions outside Europe.

Films originating from four other European countries generated more than 10% of their "worldwide" ticket sales in 2014 outside Europe: Denmark (17%, e.g. *Nymphomaniac I+II*), Belgium (15%, e.g. *The House of Magic*), Germany (13%, e.g. *Tarzan,*) and Spain (12%, e.g. *Justin and the Knights of Valour*).

Figure 16 Share of national / non-national European / non-European admissions to films from the top 10 European film exporting countries 2014 (estimated)

Ranked by share of admissions outside Europe.



Source: European Audiovisual Observatory / LUMIERE, Rentrak

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Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe

The European Audiovisual Observatory has published a new analysis of the impact of fiscal incentive schemes – tax shelters, tax rebates and tax credits - which aim at stimulating investment in the production of film and audiovisual works. The analysis identifies, describes and categorises the schemes in place across Europe and evaluates their impact in attracting foreign investment, both from within Europe and from other countries too. It then compares the various schemes according to their advantages/disadvantages and examines how they work alongside other economic and political measures. The report concludes by evaluating the impact of these systems in the international context.

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This analysis was carried out by one of Europe's leading creative industries strategy management consultancies, Olsberg·SPI, providing specialist, high level advice for over 20 years to public and private sector clients in the creative industries, focusing on film, television and digital media.

Key questions addressed

This report addresses the issues surrounding the impact of fiscal incentives currently operating in Europe, taking a comparative approach, analysing schemes from the individual perspectives of the national markets in which they operate, and evaluating their impact at a pan-European level. In doing this, the report considers:

- The **landscape** for fiscal incentives targeting film, television, and video game production, including where they operate and what structures they use;
- What **trends** exist within the European fiscal incentive system;
- The **impact**, in particular the economic impact, of fiscal incentive schemes, including questions such as:
  - Have incentives influenced the production levels, employment prospects, and direct funding systems within their own countries?
  - What is the impact of fiscal incentive structures on neighbouring countries through production flows and movement of employment?
  - Have incentives altered the business model for European independent production companies?
  - What is the fiscal impact for the States offering such incentives?
- How such incentives have been **evaluated** by the countries in which they operate, and how the conclusions of these evaluations compare with one another;
- Recommendations on **future assessment** of fiscal incentive schemes in Europe.

As part of this analysis, the report looks in greater detail at **eight selected schemes** presently operating in Europe where the most substantial amount of comparative data is available.
As well as the direct impact on the film and audiovisual industries, the report deals with the **indirect** impacts on output and employment – arising from the industries' supply chain – and the **induced** impacts – arising from those directly and indirectly employed in these industries using their earnings to buy other goods and services.

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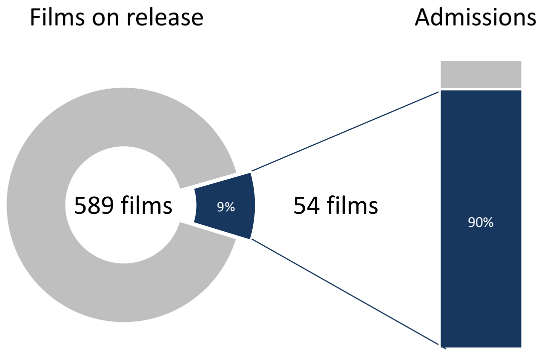
8 Concentration of Admissions

Evidently, the cumulative figures for European films do not offer any information about how many European films actually generated a significant number of admissions outside Europe. This chapter takes a closer look at the concentration of admissions among European films and the diversity of European film offerings outside Europe. It reveals that the number of European films generating large amounts of ticket sales is actually quite small.

9% of European films account for 90% of admissions

As shown in Figure 17, 9% of films accounted for 90% of total admissions generated by European films outside Europe in 2014. In other words, nine out of ten tickets sold for European films outside Europe were sold for a screening of one of the top 54 European films, which cumulatively generated 73.5 mio ticket sales. The remaining 535 European films on release (91% of the total number of European films on release outside Europe) cumulatively generated only 8.5 mio admissions.

Figure 17 Concentration of admissions to European films 2014



Source: European Audiovisual Observatory / LUMIERE, Rentrak

Top 10 films account for 65% of total non-European admissions to European films

Another way to measure admission concentration levels is shown in Table 11 overleaf which measures cumulative market share for various „top brackets“. The one figure that really stands out in 2014, is the exceptional perfomance of the **top ranking film** (*Lucy*) which on its own sold 31.9 mio tickets outside Europe and hence accounted for **38% of total admissions**. This is **by far the highest** (trackable) **level** achieved by a single film **over the past five years**[14] (see appendix for time series).

The top 10 European films outside Europe cumulatively sold 53 mio tickets which represents 65% of the total number of admissions generated by European films, which is well in line with concentration levels observed in preceding years. The top 50 accounted for 89% and the top 100 for 96% of admissions. The vast majority (83%) of European films on release consequently shared 3.7 mio admissions (4% of total admissions).

Given the comparatively low number of European films on release outside Europe, the concentration level is naturally significantly higher than in the European market where the top 100 films accounted for 63% of total European admissions. The two can therefore not be directly compared.

[14] Please note that no admissions data for China are available for the years 2010-2013.

Table 11 Concentration of admissions to European films by „top brackets“ 2014
Cumulative admissions in mio.

Top bracket	Number of films	% share	Cumulative admissions outside Europe	% share
Top 1	1	0%	39.1	38%
Top 10	10	2%	53.1	65%
Top 50	50	8%	72.7	89%
Top 100	100	17%	78.4	96%
Other	489	83%	3.7	4%
Total	**589**	**100%**	**82.0**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Four out of five European films generated fewer than 50 000 ticket sales outside Europe

Yet another way to look at the concentration of admissions among the various European films is to count the number of films by admissions brackets. As can be seen in Table 12, the vast majority of European films (82%) generated fewer than 50 000 admissions outside Europe and almost three out of ten European films (28%) drove fewer than 1 000 tickets in 2014.

Only one European film, Luc Besson's English-language thriller *Lucy* managed to producel more than five million ticket sales outside Europe in 2014, easily surpassing this benchmark with 31.9 mio admissions in the 12 non-European markets covered.

Another 12 European films managed to drive between one and five million admissions, while further 13 films produced more than 500 000 tickets and almost 50 films drove between 100 000 and 500 000 tickets.

Table 12 Number of European films by „admissions brackets“ 2014
Figures may not sum to totals due to rounding.

Admission bracket	Number of films	% share	Cumulative admissions outside Europe (in mio)	% share	Average admissions
[5 mio - [	1	0%	31.9	39%	31.9 mio
[1 mio - 5 mio[	12	2%	24.6	30%	2.0 mio
[500' - 1 mio[	13	2%	8.8	11%	677 000
[100' - 500'[	49	8%	11.2	14%	229 000
[50' - 100'[	29	5%	2.1	3%	73 000
[10' - 50'[	113	19%	2.6	3%	23 000
[1' - 10'[	210	36%	0.83	1%	4 000
[1 - 1'[	162	28%	0.05	0%	335
Grand Total	**589**	**100%**	**82 027 487**	**100%**	**-**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

9 Diversity of European Film Offering

Important note: Assessing diversity in a more qualitative sense is a complex task which is beyond the scope of this report. As specified in the methodological remarks term “film offering” refers to the number of films on release, which is the most basic indicator for measuring the theatrical film offering in a country and - in itself - has limited informational value with regard to how many European films were really accessible to audiences. There are, however, a few aspects that can be addressed by an analysis of the data sample, such as the question as to whether the portfolio of European films differed significantly from one international market to another or whether more or less the same films were shown across non-European markets. This chapter furthermore provides a breakdown by country of origin and age of productions. More observations related to the diversity of European films outside Europe resulting from a more detailed analysis of common characteristics of the top 100 European export films are described in Chapter 11.

European film portfolio varies significantly from one market to the next

As illustrated in Table 13 and Figure 18 overleaf, 62% of the 589 European films on theatrical release outside Europe in 2014, were on release in only one territory (368 films). Another 89 films (17%) were on release only in two markets while only 22 films (4%) were on release in at least half of the 12 non-European markets covered. These figures suggest that only a very small number of European films managed to be released in a large number of non-European territories while the vast majority of films were released in only one or two markets. From a „diversity“ point of view the data suggest that the portfolio of European films on release in the different non-European markets actually varies to a large extent from one market to another as only a few European „blockbusters“ are released in a large number of territories. Not surprisingly it was these „blockbusters“ that accounted for the lion’s share of admissions to European films in 2014 (see Table 13). The list of the top 100 European films in terms of admissions generated outside Europe in Chapter 10 also includes information on the number of non-European release markets on a title-by-title basis.

Table 13 European films by number of release markets 2014

Nr. of non-European release markets	European films	% share	Cumulative admissions (in mio)	% share	Average admissions
1	368	62%	4.9	6%	13 000
2	98	17%	5.0	6%	51 000
3	47	8%	7.6	9%	162 000
4	29	5%	5.6	7%	195 000
5	11	2%	3.5	4%	314 000
6	14	2%	2.3	3%	165 000
7	7	1%	3.0	4%	425 000
8	6	1%	4.2	5%	708 000
9	4	1%	6.5	8%	1.6 mio
10	3	1%	3.7	5%	1.2 mio
11	1	0%	3.7	5%	3.7 mio
12	1	0%	31.9	39%	31.9 mio
Total	**589**	**100%**	**82.0**	**100%**	**-**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Figure 18 **Share of European films with only 1 or 2 non-European release markets 2014**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

French and UK films represent majority of European "film exports" outside Europe

The breakdown of the number of European films on release as well as admissions to them by country of origin is already commented on in Chapter 7. In the context of looking into the "diversity" of the European theatrical film offering outside Europe it can be noted that France and the UK "exported" by far the largest number of films among the European countries and cumulatively accounted for every second European film screened outside Europe in 2014, as illustrated in Figure 19.

In terms of admissions French and UK films cumulatively accounted for almost 80% of total admissions to European films outside Europe in 2014. In other words, four out of five tickets sold for European films were for French or UK films. Technically speaking, this is due to the fact that the vast majority of European "blockbusters" were majority produced in one of the two countries.

Figure 19 **Share of French and UK films on non-European markets 2014** (estimated)

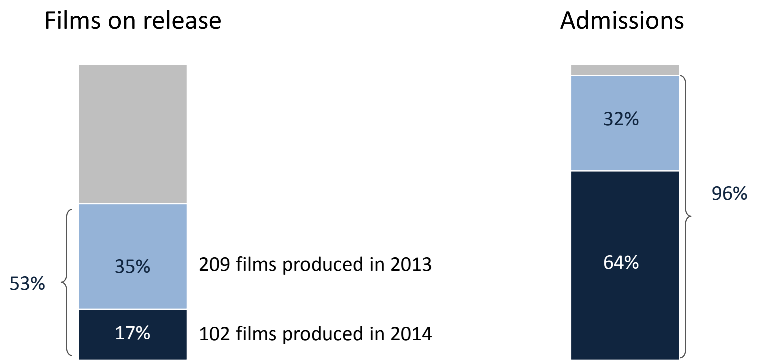
Source: European Audiovisual Observatory / LUMIERE, Rentrak

Recent productions account for 53% of the number of films on release and 96% of admissions

How diverse is the European film offering in terms of the age of the films? Are only recent productions released outside Europe or is there demand for older productions?

As illustrated in Figure 20 and Table 14, recent productions, i.e. films produced in 2013 or 2014, accounted for „only“ 53% of the European films on release but accounted for 96% of total admissions in 2014. Three to five year old productions accounted for another 35% (200 films) of European films on release but cumulatively generated only about 4% of total admissions. Almost 80 European films produced before 2009 were on release outside Europe in 2014. These figures suggest that while the commercially relevant market is practically dominated by the export of recent productions, there appears to be a certain demand for screening a limited number of older European films which do not, however, generate large numbers of admissions. The figures also time lag – with European films released outside Europe one or two years after their production year.

Figure 20 Share of „recent“ European films on non-European release markets 2014



Source: European Audiovisual Observatory / LUMIERE, Rentrak

Table 14 2014 breakdown of European film „exports“ by production year

Production Year	Films	%	Cumulative %	Admissions (in mio)	%	Cumulative %
2014	102	17%	17%	52.6	64%	64%
2013	209	35%	53%	26.3	32%	96%
2012	121	21%	73%	2.1	3%	99%
2011	51	9%	82%	0.5	1%	99%
2010	28	5%	87%	0.09	0%	100%
[2000-2009]	36	6%	93%	0.06	0%	100%
[1990-1999]	7	1%	94%	0.03	0%	100%
[1900-1989]	35	6%	100%	0.3‘	0%	100%
TOTAL	**589**	**100%**	**-**	**82.0**	**100%**	**-**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

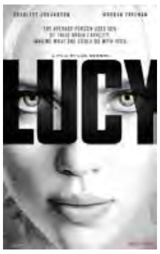
WHICH FILMS PERFORMED WELL?

10 Top 100 European Films Outside Europe

Table 15 Short profiles of top 5 European films outside Europe 2014

Admissions refer to cumulative admissions up until Dec 2014. „Int." stands for 12 non-European markets covered in this report.

1



***Lucy* (2014)**
Country of origin: FR

Director: Luc Besson

European admissions: 19.8 mio.

Int. admissions: 31.9 mio.

Int. release markets: 12

Genre: Action, Sci-Fi, Thriller

Language: English

Plot: A woman, accidentally caught in a dark deal, turns the tables on her captors and transforms into a merciless warrior evolved beyond human logic.

2

***Philomena* (2013)**
Country of origin: GB/US/FR

Director: Stephen Frears

European admissions: 5.2 mio.

Int. admissions: 6.1 mio.

Int. release markets: 11

Genre: Drama, Biography

Language: English

Plot: A world-weary political journalist picks up the story of a woman's search for her son, who was taken away from her decades ago after she became pregnant and was forced to live in a convent.

3

***Tarzan* (2013)**
Country of origin: DE

Director: Reinhard Klooss

European admissions: 2.4 mio.

Int. admissions: 3.3 mio.

Int. release markets: 10

Genre: Animation, Adventure, Family

Language: English

Plot: Tarzan and Jane Porter face a mercenary army dispatched by the evil CEO of Greystoke Energies, a man who took over the company from Tarzan's parents, after they died in a plane crash.

4

***The Theory of Everything* (2014)**
Country of origin: GB

Director: James Marsh

European admissions: 0.2 mio.

Int. admissions: 3.2 mio.

Int. release markets: 3

Genre: Drama, Romance, Biography

Language: English

Plot: A look at the relationship between the famous physicist Stephen Hawking and his wife.

5

***A Most Wanted Man* (2013)**
Country of origin: GB/US/DE

Director: Reinhard Klooss

European admissions: 1.7 mio.

Int. admissions: 2.4 mio.

Int. release markets: 9

Genre: Crime, Drama Thriller

Language: English

Plot: A Chechen Muslim illegally immigrates to Hamburg, where he gets caught in the international war on terror.

Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

Table 16 Top 100 European films in terms of admissions generated outside Europe 2014 (estimated)

N°	Film	Countries of origin	Prod. Year	# of release markets	Adm 2014 outside Europe	Adm 2014 – US/CA	Adm 2014-Latin America	Adm 2014–AU/NZ	Adm 2014–CN/KR
1	Lucy	FR	2014	12	31 859 105	15 568 754	6 580 825	1 277 081	8 432 445
2	Philomena	GB / US / FR	2013	11	3 721 049	2 406 721	471 628	805 830	36 870
3	Tarzan	DE	2013	10	3 266 469		2 158 841	6 859	1 100 769
4	The Theory of Everything	GB	2014	3	3 184 366	2 910 951			273 415
5	A Most Wanted Man	GB / US / DE	2014	9	2 367 116	2 120 225	117 666	114 929	14 296
6	Paddington	GB / FR	2014	8	2 320 523		1 748 436	572 087	
7	The Quiet Ones	GB INC / US	2014	9	1 803 756	1 046 726	747 088	530	9 412
8	The Family	FR / US	2013	9	1 709 943	500	165 980		1 543 463
9	Belle	GB	2013	4	1 490 765	1 319 390		171 375	
10	La belle et la bête	FR / DE	2014	3	1 327 645		510 507		817 138
11	Grace of Monaco	FR / US / BE / IT / CH	2014	4	1 184 807			173 122	1 011 685
12	Minuscule - La vallée des …	FR / BE	2013	7	1 181 451		291 481		889 970
13	Redemption	GB INC / US	2013	2	1 035 770		230		1 035 540
14	The House of Magic	BE	2013	5	907 425	504	298 254	292 257	316 410
15	About Time	GB	2013	7	875 761		422 099	13 941	439 721
16	Niko 2: Lentäjäveljekset	FI / DE / DK / IE	2012	2	800 850		93 277		707 573
17	Nymphomaniac Vol I	DK / DE / FR	2013	8	710 660	96 667	548 836	5 421	59 736
18	Justin and the Knights of …r	ES	2013	5	699 451		210 318		489 133
19	Calvary	IE / GB	2014	6	693 680	442 806	25 447	225 427	
20	La grande bellezza	IT / FR	2013	9	662 501	222 318	314 464	84 099	41 620
21	Autómata	BG / ES	2014	2	660 542				660 542
22	The Inbetweeners Movie 2	GB	2014	2	588 469			588 469	
23	The Trip to Italy	GB	2014	4	581 854	349 342		232 512	
24	Metro	RU	2013	1	556 380				556 380
25	Ida	PL / DK	2013	7	539 831	455 673	37 057	47 101	
26	Snezhnaya koroleva 2…	RU	2014	1	529 301				529 301
27	Mrs. Brown's Boys D'Movie	GB / IE	2014	2	481 725			481 725	
28	Pride	GB / FR	2014	4	461 347	177 939		283 408	
29	Love, Rosie	DE / GB	2014	3	445 760			153 278	292 482
30	Nymphomaniac: Vol. II	DK / DE / FR / GB / SE...	2013	8	436 093	40 243	366 905	5 420	23 525
31	Los últimos días	ES / FR	2013	1	422 414				422 414
32	Le Week-End	GB / FR	2013	5	403 374	273 691		96 699	32 984
33	[REC] 4: Apocalipsis	ES	2014	3	392 614		392 614		
34	Legendary: Tomb of the …	GB / CN	2013	1	349 436				349 436
35	Under the Skin	GB INC / US / CH	2013	5	348 703	308 331	19 073	19 095	2 204
36	Hundraåringen som klev ut …	SE	2013	4	307 348	19 008		47 773	240 567
37	Only Lovers Left Alive	DE / CH / CY / GB	2013	6	296 461	231 186	14 926	17 747	32 602
38	One Direction: Where We Are - The Concert Film	GB	2014	8	292 267		265 186	27 081	
39	Hector and the Search for …	DE / CA / GB / ZA	2014	5	285 227	138 309		24 234	122 684
40	La migliore offerta	IT	2013	8	261 441	11 471	203 299	312	46 359
41	205 - Zimmer der Angst	DE	2011	1	256 689		256 689		
42	Maya the Bee Movie	DE / AU	2014	3	256 153			20 043	236 110
43	La vie d'Adèle	FR / BE / ES	2013	10	244 855	19 656	157 710	20 040	47 449
44	Le passé	FR / IT	2013	10	238 118	149 040	57 420	25 737	5 921
45	African Safari	BE / FR / IT	2013	5	235 061		16 202		218 859
46	Yves Saint Laurent	FR / BE	2014	8	228 259	89 004	81 307	37 999	19 949
47	The Physician	DE	2013	3	214 911		214 911		
48	The Invisible Woman	GB	2013	4	211 773	138 340		73 433	
49	Schutzengel	DE	2012	1	206 015				206 015
50	Violetta. La emoción del …	GB / AR	2014	6	198 668		198 668		

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Table 16 contd.

N°	Film	Countries of origin	Prod. Year	# of release markets	Adm 2014 outside Europe	Adm 2014 – US/CA	Adm 2014- Latin America	Adm 2014– AU/NZ	Adm 2014– CN/KR
51	Der 7bte Zwerg	DE	2014	1	193 726				193 726
52	The Two Faces of January	GB / FR / US	2014	4	191 125	62 247	13 334	115 544	
53	Qu'est-ce qu'on a fait au …	FR	2014	1	190 384				190 384
54	The Devil's Violinist	DE / IT	2013	3	180 179		143 640		36 539
55	Locke	GB INC / US	2013	5	177 761	164 552		11 460	1 749
56	Eyjafjallajökull	FR	2013	6	176 962	6 260	31 460	4 166	135 076
57	Pancho, el perro millonario	ES	2014	3	176 837		176 837		
58	Turist	SE / DK / FR / NO	2014	4	166 839	137 586	14 047	15 206	
59	Casse-tête chinois	FR / BE	2013	6	158 097	52 959	84 443	20 695	
60	Attila Marcel	FR	2013	3	152 154	3 089	11 676		137 389
61	Mr. Morgan's Last Love	DE / BE / US / FR	2013	6	145 054		131 212	13 842	
62	Les garçons et Guillaume, à…	FR / BE	2013	5	143 872	52 846	89 416		1 610
63	Frank	GB / IE / US	2014	3	143 696	79 359		13 585	50 752
64	Diana	GB / FR / BE	2013	6	140 293		82 449	36	57 808
65	Mary's Land	ES	2013	4	140 223		140 223		
66	Tres bodas de más	ES	2013	1	137 775		137 775		
67	The Love Punch	FR	2013	7	135 897	3 855	131 274	768	
68	Belle et Sébastien	FR	2013	4	135 085	91 216		13 449	30 420
69	Mood Indigo	FR / BE	2013	6	131 305	37 288	59 577	190	34 250
70	Stalingrad	RU	2013	2	124 717	124 717			
71	Third Person	GB / US / DE / BE / FR	2013	1	124 006	124 006			
72	Sunshine on Leith	GB	2013	3	123 842			98 354	25 488
73	Mr. Turner	GB / DE / FR	2014	4	123 740	73 385		50 355	
74	Saving Santa	GB / US	2013	4	106 666		23 998		82 668
75	Night Train to Lisbon	DE / CH / PT	2013	5	102 988	1 890	22 793	6 140	72 165
76	Cuban Fury	GB	2014	3	97 815	11 364		86 451	
77	Zipi y Zape y el club de la …	ES	2013	2	94 442		94 442		
78	Elle s'en va	FR	2013	7	92 906	38 941	50 923	3 042	
79	A Hard Day's Night	GB	1964	2	91 118	63 358	27 760		
80	Neverlake	IT	2013	1	88 406		88 406		
81	Ernest & Celestine	FR / BE / LU	2012	5	88 022	32 236		7 648	48 138
82	Dom Hemingway	GB	2013	3	85 403	64 394	21 009		
83	Una pistola en cada mano	ES	2012	1	85 384		85 384		
84	Grand Piano	ES	2013	4	81 788	2 775	58 528		20 485
85	L'inconnu du lac	FR	2013	6	81 024	40 001	41 023		
86	Ocho apellidos vascos	ES	2014	3	80 237		80 237		
87	Amazonia	FR / BR	2013	3	78 671	4 712	72 627	1 332	
88	The Broken Circle Breakdown	BE / NL	2012	7	76 745	8 038	58 080	10 627	
89	Renoir	FR	2012	6	76 416		65 696	276	10 444
90	The Returned	ES / CA	2013	2	71 896		71 572		324
91	Jeune & jolie	FR	2013	7	70 570	6 431	58 644	5 284	211
92	El cuerpo	ES	2012	3	67 049		316		66 733
93	Paris Follies	FR	2014	4	65 811	4 504	28 434	32 873	
94	Fairytale	IT	2012	2	65 810		65 810		
95	Doctor Who: Series 8 Ep. 1	GB	2014	6	64 573		3 902	60 671	
96	Tusen ganger god natt	NO / IE / SE	2013	5	62 597	6 339	40 596	6 655	9 007
97	La cage dorée	FR	2013	4	60 032		28 406	31 626	
98	Pozitia copilului	RO	2013	6	56 881	11 953	40 179	4 749	
99	20,000 Days on Earth	GB	2014	4	56 406	34 103		22 303	
100	Avant l'hiver	FR / LU	2013	4	55 040	6 969	39 098		8 973

Source: European Audiovisual Observatory / LUMIERE, Rentrak

11 Characteristics of Top 100 Films Outside Europe

This chapter seeks to identify what the 100 most successful European theatrical film „exports“ for 2014 have in common? To which extent are these characteristics comparable to the top 100 European films within Europe?

Purpose of sample analysis

The analysis presented in this chapter does not aim to explain why these films worked well at the box offices outside Europe, nor does it try to provide a „recipe“ for international theatrical success. It is generally accepted that there is no such „box office success formula“ since virtually every film can be considered to be a unique „product“ whose success at the box office is affected by a multitude of different – partly uncontrollable – factors. Furthermore, information on some of the most important factors (e.g. marketing strategies & budgets, distribution agreements, pre-sales, etc.) are confidential and not in the public domain. **Identifying common characteristics can nevertheless raise questions and thereby provide a starting point for analysing the distribution and circulation of European films outside their home markets in further detail.**

Though this analysis is conducted only for the top 100 out of a total of almost 600 European films with admissions outside Europe, the observations are still representative because the top 100 films accounted for 96% of cumulative admissions to European films outside Europe (see Chapter 8).

Methodology

The LUMIERE database as such focuses on admissions and country-of-origin data of individual films and contains very basic additional information which allows analysis with regard to:

- **Co-productions**: See Chapter 2 for further information on the methodology related to allocating films to a country of origin and co-productions. In the context of this analysis co-productions are further split into „intra-European co-productions“ and European majority co-productions with a minority co-producing partner from outside Europe.

For the purposes of identifying common characteristics among the top 100 European films the data set was complemented with the following indicators taken from publicly available sources including IMDB, trade press and film websites:

- **Budget:** Budget estimates were taken from IMDB where available and could not be double-checked with any other source. It has to be kept in mind that these budget data are patchy and probably represent rough estimates.
- **Festival Awards**.
- **Language**: In a first step, films were categorised as „multi-“ or „single-“ language films, depending on whether the film features dialogues in different languages. In a second step, an editorial decision was taken on specifying the „main language“ of multi-language films so that films could be broken down by language.
- **Genre:** In order to produced statistics related to genres, editorial decisions were taken to allocate films to one „main“ genre group and limit the number of distinct genre groups.
- **Filming Location outside Europe**
- **Sales Agent:** Breaking sample into films with / without a sales agent, as indicated on IMDB Pro.

The analysis focused on the top 100 European films outside Europe in 2014 but was complemented by comparisons with results for the top 100 European films within Europe as well as for the top 100 films based on cumulative admissions for the five-year period 2010 and 2014, where meaningful.

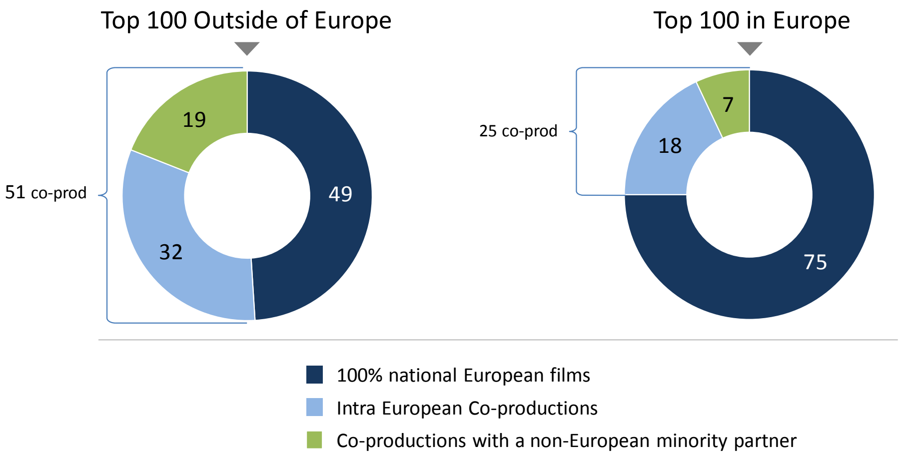
51 co-productions in the top 100 films

In 2014, the top 100 European films outside Europe featured 51 European majority co-productions and 49 100% national films. The share of co-productions among the 100 most successful films was thus twice as high outside Europe as it was among the top 100 European films in Europe which featured only 25 co-productions (see Figure 21).

It is also interesting to observe that the share of co-productions with a non-European minority partner was significantly higher in the top 100 outside Europe (19 films) than in Europe (7 films).

These observations are even more pronounced when looking at cumulative results for the five-year period 2010 to 2014, where co-productions accounted for 64 out of the top 100 films outside Europe and co-productions with non-European minority partners represented 36 films.

Figure 21 Breakdown of top 100 European films by production type 2014



Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

Majority of films produced with budget above EUR 3 mio

At the time of writing, IMDB provided budget estimates for 46 out of the top 100 European films which cumulatively generated 61 mio admissions in 2014. The distribution of these films according to different budget ranges is shown in Table 17 overleaf and suggests that the vast majority of the 100 most successful films outside Europe are produced with budgets well above the average budgets of European film productions[15].

With about EUR 13 mio, the average budget of a top 100 film outside Europe was slightly above the average budget of a top 100 film within Europe (EUR 12 mio) but almost 40% lower than the average for top 100 films based on cumulative admissions between 2010 and 2014 (EUR 20 mio). The data hence show a clear correlation between the size of the budget and the admissions generated. Average admissions increase with increasing film production budgets and the 10 films estimated to have cost over EUR 20 mio accounted for over half of the total admissions generated by the top 100 films.

[15] No data are available on the overall average budget of European films but the average budget for e.g. French films amounted to EUR 2.8 mio in 2014.

One interpretation of these figures could be that higher budgets generally successfully translate into higher production values that in turn attract larger audiences outside Europe. Additionally, there may be a link between higher budgets and the higher share of co-productions, as the latter might be necessary in order to finance such large budgets.

Table 17 Breakdown of top 100 European films outside Europe by budget range (estimated)
Budgets as indicated on IMDB. Admissions in mio.

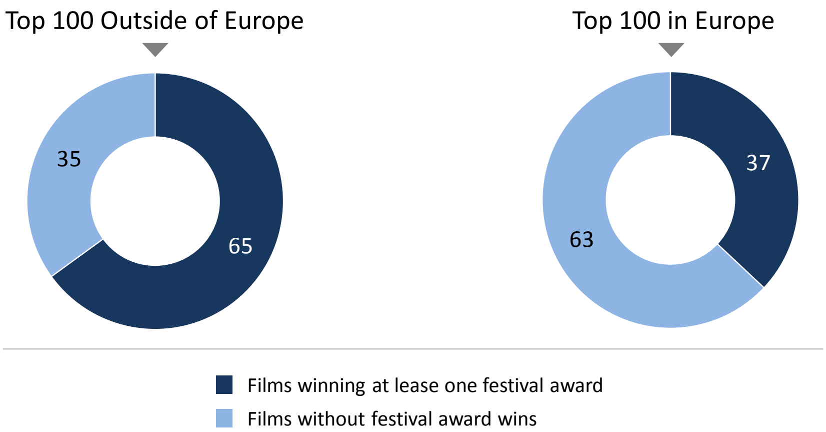
Budget range (EUR mio)	Top 100 in 2014			Top 100 for the period 2010 - 2014		
	Number of films	Adm outside Europe	Avg Adm per film	Number of films	Adm outside Europe	Avg Adm per film
[0 -3[	5	0.5	0.1	5	6.1	1.1
[3 -10[	16	4.9	0.3	18	18.4	1.0
[10-20[	15	15.2	1.0	23	87.2	3.8
[22-55[	10	40.5	4.0	27	167.8	6.2
Not available	54	17.4	0.3	27	36.0	1.1
Grand Total	**100**	**78.4**	**0.8**	**100**	**315.6**	**3.2**

Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

65 out of 100 top films won at least one film festival award

In 2014 65 of the top 100 European films outside Europe won at least one festival award compared to only 37 films in the top 100 films within Europe (see Figure 22). The data also show that films with festival awards were released on average in more non-European markets (5.6 markets in 2014) than films without awards (4.6).

Figure 22 Breakdown of top 100 European films by award win 2014



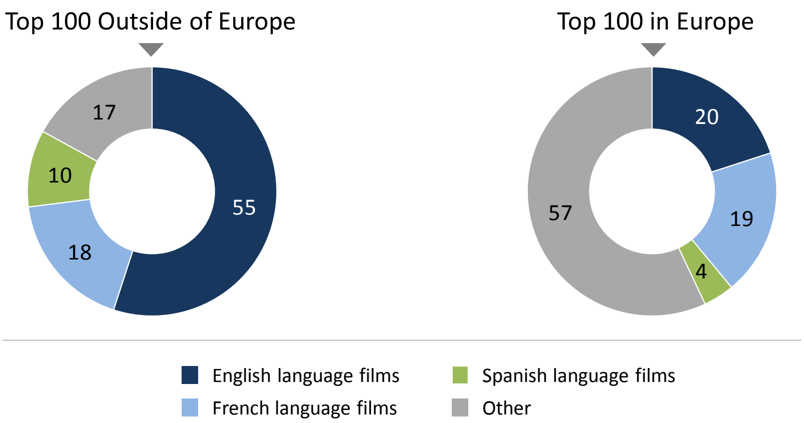
Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

English language films took 85% of admissions in 2014

A little fewer than half of the top 100 European films (44) featured dialogues spoken in different languages. The share of these „multi-language“ films was lower among the top 100 films in Europe where they were 35.

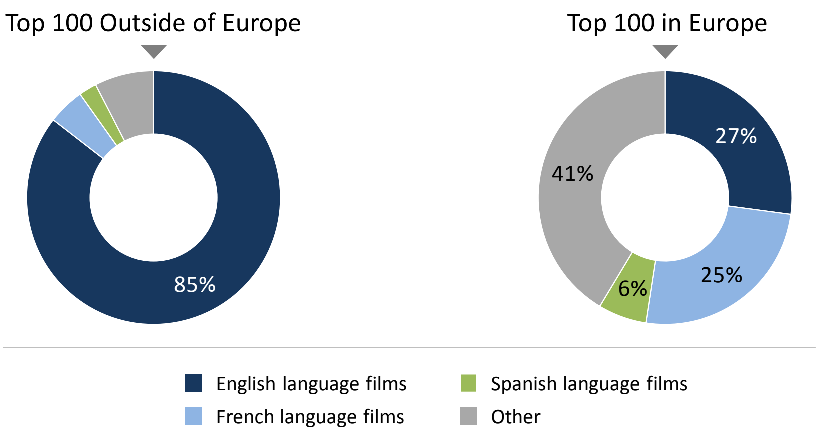
More striking however is the breakdown of films by their main language. As illustrated in Figures 23 and 24, English language films[16] accounted for 55 out of the 100 top films and 85% of the cumulative admissions of these films outside Europe in 2014. These data appear to indicate a strong affinity of non-European audiences towards English language productions, or looking at it from the other side, a somewhat limited market potential for films in other European languages. Not surprisingly the situation is quite different with the top 100 films in Europe, for which the breakdown and concentration of admissions by main language is much more diverse.

Figure 23 Breakdown of top 100 European films by main language 2014



Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

Figure 24 Breakdown of admissions to top 100 European films by main language 2014



Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

European action / thriller genre exceptionally successful in 2014 due to international success of *Lucy*

Boosted by the runaway success of *Lucy* action/thriller films accounted for 52% of the cumulative ad-

[16] Films where English is considered to be the main language.

missions generated by the top 100 European films outside Europe despite the fact that only 18 films fell into this genre category. The year 2014 was certainly notable with regard to the high number of admissions generated by European action films/thrillers. Among the top 100 European films between 2010 and 2014, the action/thriller genre was only the second most popular genre, with 26 films driving 36% of admissions, behind European drama films (31 films, 38% of admissions). Drama films also represented the largest number of films in the top 100 list in 2014 (30 films), accounting for 21% of cumulative admissions to the top 100 films, as shown in Table 18.

The data therefore suggests that in terms of genre non-European audiences are particularly interested in European drama and action films / thrillers. This stands in clear contrast to European audiences: more than half of the top 100 films in Europe in 2014 were comedies, accounting for 55% of cumulative admissions. This high share of comedies is also observed among the top 100 films in Europe going back to 2010 (48 comedies, 43% of admissions).

Outside Europe 24 European comedies made it into the top 100 list in 2014, taking 7% of admissions, behind 17 European family films accounting for 16% of admissions. In 2014 10 European animation films (which are not shown as a separate category in the table below) made it into the top 100 European films outside Europe accounting for 10% of cumulative admissions.

Table 18 Breakdown of top 100 European films by genre 2014

Outside Europe

Rank	Genre	Number of films	Admissions	% Share adm
1	Action / Thriller	18	40.7	52%
2	Drama	30	16.4	21%
3	Family	17	12.2	16%
4	Comedy	24	5.1	7%
5	Horror	6	2.7	3%
	Others	5	1.3	2%
	Grand Total	**100**	**78.4**	**100%**

In Europe

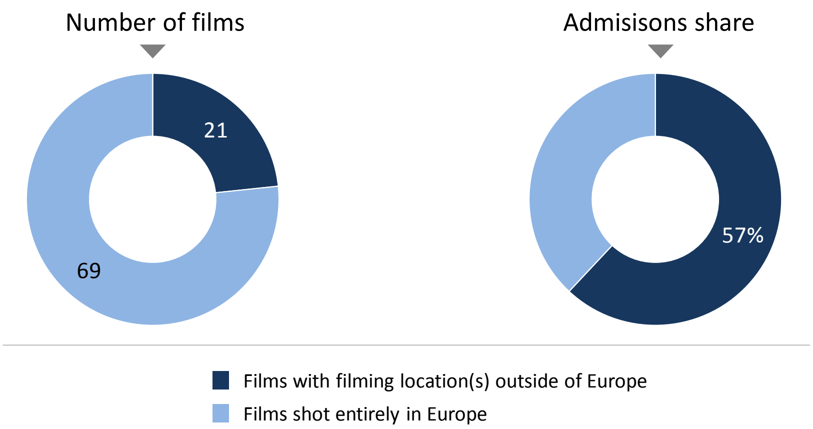
Rank	Genre	Number of films	Admissions	% Share adm
1	Comedy	52	132.2	55%
2	Family	16	41.9	18%
3	Action / Thriller	8	32.6	14%
4	Drama	22	30.6	13%
5	Others	1	0.9	0%
	Horror	1	0.9	0%
	Grand Total	**100**	**239.0**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

Films with filming location outside Europe accounted for 57% of admissions

As illustrated in Figure 25, 21 out of the top 100 European films outside Europe were at least partially shot in locations outside Europe. These films cumulatively accounted for 57% of total admissions generated by the top 100 films.

Figure 25 Breakdown of top 100 European films outside Europe by filming location 2014

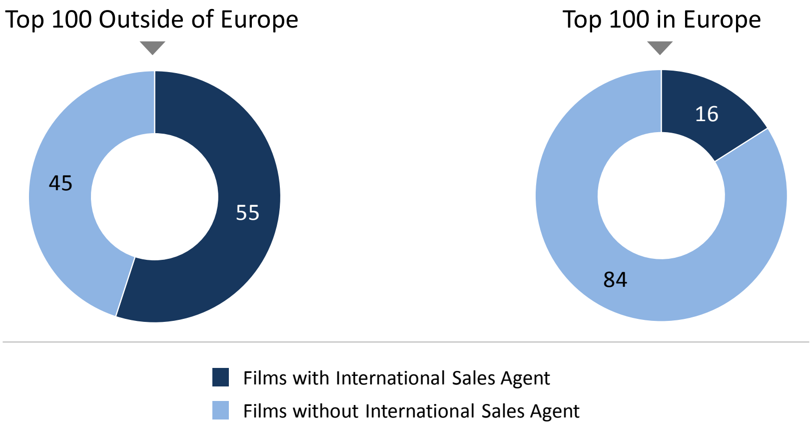


Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

More than 50% of top films have an international sales agent

As illustrated in Figure 26, 55 out of the top 100 European films outside Europe were handled by an international sales agent[17] while this was only true for 16 out of the top 100 European films in Europe.

Figure 26 Breakdown of top 100 European films outside Europe by sales agent 2014



Source: European Audiovisual Observatory / LUMIERE, Rentrak, IMDB

[17] Films where an international sales agent was indicated on IMDB Pro at the time of writing.

APPENDIX

Time Series of Headline Figures

1. Headline Figures – European films on release

Breakdown of number of European films on release - "In Europe" vs "Outside of Europe"

Remark: As tracked in LUMIERE.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world" (incl CN)	**4 474**	**4 469**	**4 730**	**4 916**	**6 188**	**4 955**	**4 730**
In Europe	4 385	4 384	4 622	4 762	6 061	4 843	4 622
Outside of Europe	448	427	509	566	589	508	509
In % of Total							
In Europe	98%	98%	98%	97%	98%	98%	98%
Outside of Europe	10%	10%	11%	12%	10%	10%	10%

Breakdown of number of European films on release - "National" vs "Non-national"

Remark: As tracked in LUMIERE.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world" (incl CN)	**4 474**	**4 469**	**4 730**	**4 916**	**6 188**	**4 955**	**4 730**
National	2 716	2 636	2 687	2 895	4 124	3 012	2 716
Non-national	2 489	2 538	2 827	2 794	3 181	2 766	2 794
- Non-national Europe	2 373	2 429	2 671	2 611	3 006	2 618	2 611
- Outside of Europe	448	427	509	566	589	508	509
In % of Total							
National	61%	59%	57%	59%	67%	60%	59%
Non-national	56%	57%	60%	57%	51%	56%	57%
- Non-national Europe	53%	54%	56%	53%	49%	53%	53%
- Outside of Europe	10%	10%	11%	12%	10%	10%	10%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

2. Headline Figures – Admissions

Breakdown of admissions to European films - "In Europe" vs "Outside of Europe"

Remark: As tracked in LUMIERE with the exception of estimated admissions for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world" (incl CN)	**364.6**	**426.4**	**474.0**	**397.3**	**458.4**	**424.1**	**426.4**
In Europe	303.6	356.7	343.1	317.3	376.3	339.4	343.1
Outside of Europe (incl CN)	61.0	69.7	130.9	80.0	82.0	*84.7*	*80.0*
- thereof CN	*4.7*	*7.1*	*13.4*	*12.2*	15.5	*10.6*	*12.2*
- % CN	*8%*	*10%*	*10%*	*15%*	19%	12%	10%
Outside of Europe (excl CN)	56.3	62.6	117.5	67.7	66.5	74.1	66.5
In % of Total (incl CN)							
In Europe	83%	84%	72%	80%	82%	80%	82%
Outside of Europe (incl CN)	17%	16%	28%	20%	18%	20%	18%

Breakdown of admissions to European films - "National" vs "Non-national"

Remark: As tracked in LUMIERE with the exception of estimated admissions for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world" (incl CN)	**364.6**	**426.4**	**474.0**	**397.3**	**458.4**	**424.1**	**426.4**
National	219.1	268.0	227.2	237.1	276.9	245.7	237.1
Non-national	145.5	158.3	246.8	160.2	181.5	178.4	160.2
- Non-national Europe	84.5	88.6	115.9	80.3	99.4	93.7	88.6
- Outside of Europe	*61.0*	*69.7*	*130.9*	*80.0*	82.0	84.7	80.0
In % of Total							
National	60%	63%	48%	60%	60%	58%	60%
Non-national	40%	37%	52%	40%	39.6%	42%	40%
- Non-national Europe	23%	21%	24%	20%	22%	22%	22%
- Outside of Europe	17%	16%	28%	20%	18%	20%	18%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

3. Headline Figures – GBO

Breakdown of GBO to European films - "In Europe" vs "Outside of Europe"

Estimated based on average ticket prices and admissions tracked in LUMIERE as well as estimated admissions for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world" (incl CN)	**2 367**	**2 715**	**3 090**	**2 538**	**3 092**	**2 760**	**2 839**
In Europe	2 025	2 354	2 368	2 121	2 597	2 293	2 346
Outside of Europe (incl CN)	342	361	722	416	496	467	493
- thereof CN	12	28	60	53	80	47	54
- % CN	*4%*	*8%*	*8%*	*13%*	*16%*	*10%*	*11%*
Outside of Europe (excl CN)	330	333	662	363	415	421	439
In % of Total (incl CN)							
In Europe	86%	87%	77%	84%	84%	83%	83%
Outside of Europe (incl CN)	14%	13%	23%	16%	16%	17%	17%

Breakdown of GBO to European films - "National" vs "Non-national"

Estimated based on average ticket prices and admissions tracked in LUMIERE as well as estimated admissions for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world" (incl CN)	**2 367**	**2 715**	**3 090**	**2 538**	**3 092**	**2 760**	**2 715**
National	1 462	1 769	1 568	1 585	1 911	1 659	1 585
Non-national	906	946	1 522	953	1 182	1 102	953
- Non-national Europe	563	585	800	537	686	634	585
- Outside of Europe	342	361	722	416	496	467	416
In % of Total							
National	62%	65%	51%	62%	62%	60%	62%
Non-national	38%	35%	49%	38%	38%	40%	38%
- Non-national Europe	24%	22%	26%	21%	22%	23%	22%
- Outside of Europe	14%	13%	23%	16%	16%	17%	16%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Time Series of Key Indicators by Market / Region

4. Number of European films on release

Number of European films on release

Remark: As tracked in LUMIERE.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world"	**4 474**	**4 469**	**4 730**	**4 916**	**6 188**	**4 955**	**4 730**
In Europe	4 385	4 384	4 622	4 762	6 061	4 843	4 622
Outside of Europe	448	427	509	566	589	508	509
US & CA	172	221	277	273	218	232	221
Latin America	270	205	216	226	318	247	226
AU & NZ	113	88	101	102	126	106	102
CN & KR	~	~	~	~	155	155	155
CA	~	98	149	133	94	119	116
US	~	183	217	202	188	198	195
AR	93	59	74	58	87	74	74
BR	97	79	93	111	144	105	97
CL	36	35	31	30	40	34	35
CO	63	44	61	63	94	65	63
MX	117	71	87	75	130	96	87
VE	16	21	34	24	23	24	23
AU	86	65	87	75	110	85	86
NZ	76	61	60	70	72	68	70
CN	~	~	~	~	22	22	22
KR	69	63	114	180	142	114	114

Source: European Audiovisual Observatory / LUMIERE, Rentrak

5. Market share of European films – Films on release

Market share of European films on release

Remark: As tracked in LUMIERE with the exception of estimates for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world"	**61%**	**60%**	**58%**	**54%**	**57%**	**58%**	**58%**
In Europe	68%	69%	69%	67%	66%	68%	68%
Outside of Europe	21%	19%	19%	19%	21%	20%	19%
US & CA	24%	20%	21%	19%	24%	22%	21%
Latin America	29%	25%	26%	24%	24%	26%	25%
AU & NZ	24%	22%	25%	22%	22%	23%	22%
CN & KR	~	~	~	~	16%	16%	16%
CA	~	21%	28%	23%	20%	23%	22%
US	~	18%	18%	16%	23%	19%	18%
AR	26%	20%	23%	17%	18%	21%	20%
BR	27%	23%	28%	27%	26%	26%	27%
CL	20%	19%	16%	17%	16%	17%	17%
CO	26%	21%	29%	26%	27%	26%	26%
MX	25%	22%	28%	20%	23%	24%	23%
VE	10%	13%	21%	14%	12%	14%	13%
AU	23%	19%	23%	19%	21%	21%	21%
NZ	23%	22%	23%	24%	22%	23%	23%
CN	~	~	~	~	5.2%	5%	5%
KR	17%	16%	24%	25%	24%	21%	24%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

6. Admissions to European films

Admissions to European Films

Remark: As tracked in LUMIERE with the exception of estimated admissions for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world"	**364.6**	**426.4**	**474.0**	**397.3**	**458.4**	**424.1**	**426.4**
In Europe	303.6	356.7	343.1	317.3	376.3	339.4	343.1
Outside of Europe	61.0	69.7	130.9	80.0	82.0	84.7	80.0
US & CA	31.4	34.9	67.2	36.6	30.7	40.2	34.9
Latin America	14.6	18.4	31.1	19.0	21.2	20.9	19.0
AU & NZ	6.3	5.7	7.2	5.0	7.0	6.2	6.3
CN & KR *est*	*8.7*	*10.7*	*25.4*	*19.3*	23.1	*17.4*	*19.3*
CA	~	2.7	6.3	3.4	3.4	3.9	3.4
US	~	32.2	60.8	33.3	27.4	38.4	32.7
AR	1.7	2.3	4.2	2.7	1.7	2.5	2.3
BR	3.0	5.1	6.6	5.3	6.4	5.3	5.3
CL	0.4	0.5	0.7	0.7	0.6	0.6	0.6
CO	1.2	1.8	3.0	2.2	2.2	2.1	2.2
MX	7.4	8.0	15.3	7.4	9.5	9.5	8.0
VE	1.0	0.7	1.3	0.7	0.7	0.9	0.7
AU	5.1	4.3	6.0	4.0	5.9	5.1	5.1
NZ	1.1	1.4	1.1	1.0	1.1	1.1	1.1
CN est	*4.7*	*7.1*	*13.4*	*12.2*	15.5	*10.6*	*12.2*
KR	4.1	3.6	12.0	7.1	7.5	6.9	7.1

Source: European Audiovisual Observatory / LUMIERE, Rentrak

7. Market share of European films – Admissions

Market Share of European Films - In Terms of Admissions

Remark: Based on admissions tracked in LUMIERE with the exception of estimated admissions for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total "world"	**10%**	**12%**	**13%**	**10%**	**11%**	**11%**	**11%**
In Europe	26%	31%	30%	28%	33%	29%	30%
Outside of Europe	3%	3%	5%	3%	3%	3%	3%
US & CA	2%	3%	5%	3%	2%	3%	3%
Latin America	3%	4%	6%	4%	4%	4%	4%
AU & NZ	6%	6%	8%	6%	8%	7%	6%
CN & KR est	*2%*	*2%*	*4%*	*2%*	2%	3%	2%
CA	~	2%	5%	3%	3%	3%	3%
US	~	3%	5%	3%	2%	3%	3%
AR	4%	6%	9%	6%	4%	6%	6%
BR	2%	4%	5%	4%	4%	4%	4%
CL	2%	3%	4%	4%	3%	3%	3%
CO	4%	5%	8%	5%	5%	5%	5%
MX	4%	4%	7%	3%	4%	4%	4%
VE	3%	3%	5%	2%	2%	3%	3%
AU	6%	5%	7%	5%	8%	6%	6%
NZ	7%	11%	9%	10%	10%	9%	10%
CN est	*2%*	*2%*	*3%*	*2%*	2%	2%	2%
KR	3%	2%	6%	3%	4%	4%	3%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

8. GBO to European films

GBO to European Films in MEUR

Estimated based on average ticket prices and admissions tracked in LUMIERE as well as estimated admissions for China for the years 2010-2013.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total	**2 367**	**2 715**	**3 090**	**2 538**	**3 092**	**2 760**	**2 715**
In Europe	2 025	2 354	2 368	2 121	2 597	2 293	2 354
Outside of Europe	342	361	722	416	496	467	416
US & CA	209	199	420	224	222	255	222
Latin America	47	62	108	62	80	72	62
AU & NZ	53	54	72	41	67	57	54
CN & KR est	*33*	*46*	*122*	*90*	126	84	90
CA	~	18	41	21	24.3	26	22
US	~	180	379	203	197.3	240	200
AR	6	9	17	11	8.1	10	9
BR	12	22	28	21	30.3	23	22
CL	1	2	3	3	3.0	3	3
CO	4	5	10	7	8.1	7	7
MX	21	22	42	20	29.6	27	22
VE	3	2	8	1	1.3	3	2
AU	44	41	60	33	58.3	47	44
NZ	9	13	11	7	8.9	10	9
CN est	*12*	*28*	*60*	*53*	80.2	47	53
KR	21	18	62	37	46.3	37	37

Source: European Audiovisual Observatory / LUMIERE, Rentrak

9. Market share of European films – GBO

Market Share of European Films - In Terms of GBO

Based on GBO estimates.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Total	**11%**	**14%**	**14%**	**12%**	**12%**	**13%**	**12%**
In Europe	26%	31%	30%	28%	33%	30%	30%
Outside of Europe	3%	3%	5%	3%	3%	3%	3%
US & CA	2%	3%	5%	3%	2%	3%	3%
Latin America	3%	4%	6%	4%	4%	4%	4%
AU & NZ	6%	6%	8%	6%	8%	7%	6%
CN & KR est	*2%*	*2%*	*4%*	*2%*	2%	3%	2%
CA	~	2%	5%	3%	3%	3%	3%
US	~	3%	5%	3%	2%	3%	3%
AR	4%	6%	9%	6%	4%	6%	6%
BR	2%	4%	5%	4%	4%	4%	4%
CL	2%	3%	4%	4%	3%	3%	3%
CO	4%	5%	8%	5%	5%	5%	5%
MX	4%	4%	7%	3%	4%	4%	4%
VE	3%	3%	5%	2%	2%	3%	3%
AU	6%	5%	7%	5%	8%	6%	6%
NZ	7%	11%	9%	10%	10%	9%	10%
CN est	*2%*	*2%*	*3%*	*2%*	2%	2%	2%
KR	3%	2%	6%	3%	4%	4%	3%

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Key Indicators 2014 by Country of Origin

10. Number of European films on release outside Europe 2014

Number of European films on release outside of Europe by country of origin - 2014

Remark: As tracked in LUMIERE.

Country of Origin		First Releases	Other	Total	% share
AT	Austria	7	3	10	2%
BA	Bosnia-Herzegovina	1	0	1	0%
BE	Belgium	10	0	10	2%
BG	Bulgaria	1	0	1	0%
BY	Belarus		1	1	0%
CH	Switzerland	7	4	11	2%
CZ	Czech Republic	2	1	3	1%
DE	Germany	37	12	49	8%
DK	Denmark	11	4	15	3%
ES	Spain	52	11	63	11%
FI	Finland	2	1	3	1%
FR	France	123	60	183	31%
GB	United Kingdom	89	31	120	20%
GE	Georgia	1	0	1	0%
GR	Greece	1	0	1	0%
HR	Croatia	1	0	1	0%
HU	Hungary	3	1	4	1%
IE	Ireland	5	1	6	1%
IS	Iceland	3	0	3	1%
IT	Italy	17	14	31	5%
LU	Luxembourg		2	2	0%
NL	Netherlands	8	2	10	2%
NO	Norway	12	1	13	2%
PL	Poland	4	2	6	1%
PT	Portugal	3	2	5	1%
RO	Romania	3	1	4	1%
RS	Serbia	1	0	1	0%
RU	Russian Federation	11	3	14	2%
SE	Sweden	10	1	11	2%
TR	Turkey	3	2	5	1%
UA	Ukraine	1	0	1	0%
Total 31 European countries		**429**	**160**	**589**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

11. Admissions to European films outside Europe 2014

Admissions to European films outside of Europe by country of origin - 2014

Remark: As tracked in LUMIERE.

Country of Origin		First Releases	Other	Total	% share
AT	Austria	29 932	3 213	33 145	0%
BA	Bosnia-Herzegovina	465		465	0%
BE	Belgium	1 296 032		1 296 032	2%
BG	Bulgaria	660 542		660 542	1%
BY	Belarus		359	359	0%
CH	Switzerland	48 348	7 052	55 400	0%
CZ	Czech Republic	26 722	377	27 099	0%
DE	Germany	6 070 924	11 860	6 082 784	7%
DK	Denmark	1 250 268	8 359	1 258 627	2%
ES	Spain	2 917 934	29 383	2 947 317	4%
FI	Finland	801 661	48	801 709	1%
FR	France	41 005 346	173 649	41 178 995	50%
GB	United Kingdom	22 737 846	187 315	22 925 161	28%
GE	Georgia	8 047		8 047	0%
GR	Greece	8 441		8 441	0%
HR	Croatia	43 095		43 095	0%
HU	Hungary	21 144	2 529	23 673	0%
IE	Ireland	703 725	988	704 713	1%
IS	Iceland	14 450		14 450	0%
IT	Italy	1 210 075	60 564	1 270 639	2%
LU	Luxembourg		2 044	2 044	0%
NL	Netherlands	29 825	588	30 413	0%
NO	Norway	126 062	2	126 064	0%
PL	Poland	553 042	497	553 539	1%
PT	Portugal	6 479	1 009	7 488	0%
RO	Romania	69 576	96	69 672	0%
RS	Serbia	21 336		21 336	0%
RU	Russian Federation	1 264 182	3 754	1 267 936	2%
SE	Sweden	571 433	2 030	573 463	1%
TR	Turkey	34 243	115	34 358	0%
UA	Ukraine	481		481	0%
Total 31 European countries		**81 531 656**	**495 831**	**82 027 487**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

12. Admissions breakdown 2014 – „national“ vs. „non-national“

Breakdown of "worldwide" admissions into national vs non-national admissions - by country of origin 2014

Remark: As tracked in LUMIERE. This breakdown can not be provideded for the following countries due to lack of 2014 admissions data for their territories: (BA) Bosnia-Herzegovina, (BY) Belarus, (GE) Georgia, (LU) Luxembourg, (RS) Serbia, (UA) Ukraine.

Country of Origin		% Share National Adm	% Share Non-Nat Adm	% Share Non-Nat Adm within Europe	% Share Non-Nat Adm outside of Europe
AT	Austria	57%	43%	40%	3%
BE	Belgium	9%	91%	76%	15%
BG	Bulgaria	16%	84%	22%	62%
CH	Switzerland	38%	62%	59%	4%
CZ	Czech Republic	80%	20%	19%	1%
DE	Germany	61%	39%	26%	13%
DK	Denmark	45%	55%	38%	17%
EE	Estonia	64%	36%	36%	0%
ES	Spain	82%	18%	6%	12%
FI	Finland	65%	35%	10%	25%
FR	France	49%	51%	26%	26%
GB	United Kingdom	32%	68%	31%	37%
GR	Greece	78%	22%	20%	2%
HR	Croatia	36%	64%	47%	17%
HU	Hungary	78%	22%	17%	5%
IE	Ireland	n/a	n/a	n/a	43%
IS	Iceland	56%	44%	38%	5%
IT	Italy	86%	14%	9%	5%
LT	Lithuania	94%	6%	6%	0%
LV	Latvia	99%	1%	1%	0%
MK	Former Yugoslav Republic of Macedonia	97%	3%	3%	0%
NL	Netherlands	97%	3%	2%	0%
NO	Norway	73%	27%	24%	3%
PL	Poland	86%	14%	10%	4%
PT	Portugal	97%	3%	1%	1%
RO	Romania	48%	52%	36%	16%
RU	Russian Federation	94%	6%	3%	3%
SE	Sweden	49%	51%	44%	7%
SI	Slovenia	72%	28%	28%	0%
SK	Slovakia	75%	25%	25%	0%
TR	Turkey	94%	6%	6%	0%
Total European films		**60%**	**40%**	**22%**	**18%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Time Series of Concentration & Diversity Indicators

13. Concentration of admissions to European films outside Europe – by „top brackets“

Admissions to European films by "top brackets"

In million. Excluding CN for all years except 2014.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Top 1	6.1	18.9	26.8	9.6	31.9	18.7	18.9
Top 10	33.5	42.4	83.7	45.6	53.1	51.6	45.6
Top 50	49.5	56.0	108.5	61.3	72.7	69.6	61.3
Top 100	53.5	59.7	113.9	64.7	78.4	74.0	64.7
Other	2.9	2.9	3.5	3.1	3.7	3.2	3.1
Total	**56.3**	**62.6**	**117.5**	**67.7**	**82.0**	**77.2**	**67.7**

Share of admissions to European films by "top brackets"

% share of total admissions.

	2010	2011	2012	2013	2014	AVG	MEDIAN
Top 1	11%	30%	23%	14%	39%	23%	23%
Top 10	59%	68%	71%	67%	65%	66%	67%
Top 50	88%	90%	92%	90%	89%	90%	90%
Top 100	95%	95%	97%	95%	96%	96%	95%
Other	5%	5%	3%	5%	4%	4%	5%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

14. Number of European films outside Europe – by „admission brackets“

Number of European films by "admissions brackets"

Remark: Excluding CN for all years except 2014.

	2010	2011	2012	2013	2014	AVG	MEDIAN
[5 mio - [	2	3	6	3	1	3	3
[1 mio - 5 mio[	9	6	10	9	12	9	9
[500' - 1 mio[	9	7	12	8	13	10	9
[100' - 500'[	41	41	46	36	49	43	41
[50' - 100'[	36	35	30	34	29	33	34
[10' - 50'[	98	111	103	110	113	107	110
[1' - 10'[	162	137	184	206	210	180	184
[1 - 1'[	91	87	118	160	162	124	118
Total	**448**	**427**	**509**	**566**	**589**	**508**	**509**

Share of European films by "admissions brackets"

% share of total number of films.

	2010	2011	2012	2013	2014	AVG	MEDIAN
[5 mio - [	0%	1%	1%	1%	0%	1%	1%
[1 mio - 5 mio[	2%	1%	2%	2%	2%	2%	2%
[500' - 1 mio[	2%	2%	2%	1%	2%	2%	2%
[100' - 500'[	9%	10%	9%	6%	8%	8%	9%
[50' - 100'[	8%	8%	6%	6%	5%	7%	6%
[10' - 50'[	22%	26%	20%	19%	19%	21%	20%
[1' - 10'[	36%	32%	36%	36%	36%	35%	36%
[1 - 1'[	20%	20%	23%	28%	28%	24%	23%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

15. Admissions to European films outside Europe – by „admission brackets“

Admissions to European films by by "admissions brackets"

In million. Excluding CN for all years except 2014.

	2010	2011	2012	2013	2014	AVG	MEDIAN
[5 mio - [	12.0	30.2	72.0	23.0	31.9	33.8	30.2
[1 mio - 5 mio[	22.6	11.3	22.3	25.3	24.6	21.2	22.6
[500' - 1 mio[	6.7	4.8	7.8	5.7	8.8	6.8	6.7
[100' - 500'[	9.5	10.6	9.8	7.9	11.2	9.8	9.8
[50' - 100'[	2.6	2.4	2.1	2.3	2.1	2.3	2.3
[10' - 50'[	2.3	2.6	2.6	2.6	2.6	2.5	2.6
[1' - 10'[	0.7	0.6	0.7	0.8	0.8	0.7	0.7
[1 - 1'[	0.0	0.0	0.0	0.1	0.1	0.0	0.0
Total	**56.3**	**62.6**	**117.5**	**67.7**	**82.0**	**77.2**	**67.7**

Share of admissions to European films by "admission brackets"

% share of total admissions.

	2010	2011	2012	2013	2014	AVG	MEDIAN
[5 mio - [	21%	48%	61%	34%	39%	41%	39%
[1 mio - 5 mio[	40%	18%	19%	37%	30%	29%	30%
[500' - 1 mio[	12%	8%	7%	8%	11%	9%	8%
[100' - 500'[	17%	17%	8%	12%	14%	14%	14%
[50' - 100'[	5%	4%	2%	3%	3%	3%	3%
[10' - 50'[	4%	4%	2%	4%	3%	3%	4%
[1' - 10'[	1%	1%	1%	1%	1%	1%	1%
[1 - 1'[	0%	0%	0%	0%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

16. Number of European films outside Europe – by number of release markets

Number of European films by number of release markets outside of Europe

Remark: Excluding CN for all years except 2014

Release markets	2010	2011	2012	2013	2014	AVG	MEDIAN
1	293	274	303	366	368	321	303
2	74	75	109	105	98	92	98
3	28	33	33	38	47	36	33
4	24	16	22	17	29	22	22
5	9	9	14	16	11	12	11
6	5	8	8	7	14	8	8
7	3	6	3	4	7	5	4
8	2	1	4	7	6	4	4
9	8	2	6	3	4	5	4
10	2	2	3	3	3	3	3
11	~	1	4	0	1	2	1
12	~	~	~	~	1	1	1
Total	**448**	**427**	**509**	**566**	**589**	**508**	**509**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Share of European films by number of release markets

% share of total number of films.

Release markets	2010	2011	2012	2013	2014	AVG	MEDIAN
1	65%	64%	54%	65%	62%	62%	64%
2	17%	18%	19%	19%	17%	18%	18%
3	6%	8%	6%	7%	8%	7%	7%
4	5%	4%	4%	3%	5%	4%	4%
5	2%	2%	2%	3%	2%	2%	2%
6	1%	2%	1%	1%	2%	2%	1%
7	1%	1%	1%	1%	1%	1%	1%
8	0%	0%	1%	1%	1%	1%	1%
9	2%	0%	1%	1%	1%	1%	1%
10	0%	0%	1%	1%	1%	0%	1%
11	~	0%	1%	0%	0%	0%	0%
12	~	~	~	~	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

17. Admissions to European films outside Europe – by number of release markets

Admissions to European films by number of release markets outside of Europe

In million. Excluding CN for all years except 2014.

Release markets	2010	2011	2012	2013	2014	AVG	MEDIAN
1	4.6	6.7	5.1	3.9	4.9	5.1	4.9
2	8.5	5.4	7.8	3.8	5.0	6.1	5.4
3	5.2	2.0	4.2	2.7	7.6	4.3	4.2
4	2.5	1.8	21.3	4.2	5.6	7.1	4.2
5	2.5	3.9	4.7	9.5	3.5	4.8	3.9
6	2.2	8.4	3.9	3.1	2.3	4.0	3.1
7	4.2	3.9	0.9	10.3	3.0	4.4	3.9
8	2.7	0.7	1.4	15.6	4.2	4.9	2.7
9	22.4	19.4	9.3	2.9	6.5	12.1	9.3
10	1.4	4.4	20.9	11.7	3.7	8.4	4.4
11	~	6.1	37.7	0.0	3.7	11.9	4.9
12	~	~	~	~	31.9	31.9	31.9
Total	**56.3**	**62.6**	**117.5**	**67.7**	**82.0**	**77.2**	**67.7**

Share of admissions to European films by number of release markets outside of Europe

% share of total admissions.

Release markets	2010	2011	2012	2013	2014	AVG	MEDIAN
1	8%	11%	8%	6%	6%	8%	8%
2	15%	9%	12%	6%	6%	9%	9%
3	9%	3%	6%	4%	9%	6%	6%
4	4%	3%	31%	6%	7%	10%	6%
5	4%	6%	7%	14%	4%	7%	6%
6	4%	13%	6%	5%	3%	6%	5%
7	7%	6%	1%	15%	4%	7%	6%
8	5%	1%	2%	23%	5%	7%	5%
9	40%	31%	14%	4%	8%	19%	14%
10	2%	7%	31%	17%	5%	12%	7%
11	~	10%	56%	0%	5%	17%	7%
12	~	~	~	~	39%	39%	39%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Rentrak

Data Scope – Coverage Rates

18. Number of films covered in LUMIERE by market 2010-2014

Number of films tracked in LUMIERE by territory

Territory			2010	2011	2012	2013	2014
EUROPE							
1	AT	Austria	504	511	514	510	410
2	BA	Bosnia-Herzegovina		149			
3	BE	Belgium	462	470	483	344	355
4	BG	Bulgaria	188	275	280	283	305
5	CH	Switzerland	1 572	1 560	1 677	1 671	1 642
6	CY	Cyprus	23	6	5	4	145
7	CZ	Czech Republic	1 049	1 117	1 124	1 228	1 065
8	DE	Germany	546	551	598	609	2 337
9	DK	Denmark	642	287	246	260	243
10	EE	Estonia	302	351	397	377	351
11	ES	Spain	1 302	1 237	1 234	1 463	1 473
12	FI	Finland	375	409	329	337	336
13	FR	France	757	838	790	933	794
14	GB	United Kingdom	714	647	739	798	2 552
15	GR	Greece	328	361	303	329	285
16	HR	Croatia	54	223	185	247	208
17	HU	Hungary	256	273	288	302	554
18	IE	Ireland	39	33	34	30	
19	IS	Iceland	12	13	30	7	161
20	IT	Italy	831	727	907	1 110	1 195
21	LI	Liechtenstein	13	13	17		
22	LT	Lithuania	247	300	43	304	260
23	LU	Luxembourg	97	121	110	76	20
24	LV	Latvia	295	390	480	13	517
25	ME	Montenegro (from June 2006)				177	182
26	MK	Former Yugoslav Republic of Macedonia			80		221
27	NL	Netherlands	1 277	1 329	1 113	1 201	1 111
28	NO	Norway	590	538	483	483	495
29	PL	Poland	418	459	474	507	448
30	PT	Portugal	636	790	816	956	995
31	RO	Romania	404	133	398	411	404
32	RU	Russian Federation	411	342	401	497	622
33	SE	Sweden	640	636	536	575	535
34	SI	Slovenia	385	383	399	442	429
35	SK	Slovakia	464	257	611	566	599
36	TR	Turkey	382	429	491	498	564
OUTSIDE OF EUROPE							
1	AR	Argentina	365	304	335	366	499
2	AU	Australia	385	356	410	432	569
3	BR	Brazil	366	363	358	467	613
4	CA	Canada		488	568	601	484
5	CL	Chile	186	190	209	203	281
6	CN	China					422
7	CO	Colombia	245	208	215	241	343
8	KR	South Korea	407	402	492	729	591
9	MX	Mexico	475	326	323	376	586
10	NZ	New Zealand	335	316	288	311	355
11	US	United States of America	709	998	1 221	1 238	815
12	VE	Venezuela	161	164	166	166	199

Source: European Audiovisual Observatory / LUMIERE, Rentrak

19. Admissions covered in LUMIERE by market 2010-2014

Admissions tracked in LUMIERE by territory

Territory			2010	2011	2012	2013	2014
EUROPE							
1	**AT**	Austria	16 487 733	15 813 237	16 434 386	15 214 412	14 285 087
2	**BA**	Bosnia-Herzegovina		494 772			
3	**BE**	Belgium	19 185 716	18 478 038	19 203 820	17 430 501	10 205 763
4	**BG**	Bulgaria	3 993 309	4 727 140	4 108 824	4 792 683	4 893 323
5	**CH**	Switzerland	14 730 732	14 832 295	15 464 267	13 577 832	12 785 980
6	**CY**	Cyprus	24 110	15 915	14 050	8 366	695 151
7	**CZ**	Czech Republic	13 549 458	10 780 344	11 152 268	11 032 364	11 449 806
8	**DE**	Germany	122 334 821	126 755 958	131 563 808	126 059 778	120 298 808
9	**DK**	Denmark	12 952 028	10 836 840	14 122 151	13 888 535	12 187 896
10	**EE**	Estonia	2 133 782	2 476 185	2 592 537	2 528 240	2 598 186
11	**ES**	Spain	101 591 579	98 172 189	94 043 529	79 648 617	87 585 014
12	**FI**	Finland	7 565 314	7 146 914	8 393 943	7 722 936	7 311 479
13	**FR**	France	198 721 626	207 857 395	194 730 726	178 724 378	190 565 466
14	**GB**	United Kingdom	186 228 332	190 045 312	185 103 574	176 255 610	168 059 175
15	**GR**	Greece	11 876 633	11 025 905	9 942 744	9 289 557	8 964 625
16	**HR**	Croatia	253 257	3 367 012	3 876 497	4 023 161	3 754 827
17	**HU**	Hungary	9 508 512	10 343 231	10 086 836	9 635 321	10 995 529
18	**IE**	Ireland	133 891	91 431	69 610	44 149	
19	**IS**	Iceland	20 303	14 511	35 824	18 313	1 344 560
20	**IT**	Italy	110 815 866	89 472 301	92 190 190	97 791 778	91 371 607
21	**LI**	Liechtenstein	2 125	1 690	2 363		
22	**LT**	Lithuania	2 625 603	2 970 967	139 993	3 257 020	3 234 595
23	**LU**	Luxembourg	109 750	189 072	170 115	79 310	399 100
24	**LV**	Latvia	2 053 433	2 021 268	2 258 661	26 901	2 301 630
25	**ME**	Montenegro (from June 2006)				222 804	258 894
26	**MK**	Former Yugoslav Republic of Macedonia			118 511		357 324
27	**NL**	Netherlands	28 171 903	30 429 232	28 652 781	30 629 011	30 611 197
28	**NO**	Norway	10 866 614	11 551 919	11 928 047	11 614 265	10 895 929
29	**PL**	Poland	37 431 942	38 583 426	38 421 989	36 242 716	40 273 663
30	**PT**	Portugal	16 550 860	15 688 835	13 798 143	12 511 978	12 085 692
31	**RO**	Romania	6 474 733	5 307 028	8 316 859	9 020 701	10 091 621
32	**RU**	Russian Federation	164 707 373	172 672 396	171 671 503	192 409 536	191 529 707
33	**SE**	Sweden	15 838 199	16 426 846	18 346 705	16 582 505	16 236 027
34	**SI**	Slovenia	2 886 138	2 869 398	2 636 702	2 159 369	1 849 720
35	**SK**	Slovakia	3 595 409	3 559 129	3 432 069	3 720 169	4 118 062
36	**TR**	Turkey	41 296 834	42 292 597	44 218 040	50 399 726	61 353 895
OUTSIDE OF EUROPE							
1	**AR**	Argentina	38 083 580	40 946 835	45 165 968	46 180 711	43 797 344
2	**AU**	Australia	93 142 689	79 590 628	81 039 376	74 291 541	77 117 515
3	**BR**	Brazil	134 436 412	134 562 983	137 939 391	141 903 602	154 745 338
4	**CA**	Canada		121 371 465	128 539 934	117 059 141	116 206 322
5	**CL**	Chile	14 964 214	16 498 330	19 372 659	20 338 487	21 940 101
6	**CN**	China					794 733 977
7	**CO**	Colombia	31 812 288	35 160 052	38 672 496	41 014 822	45 986 154
8	**KR**	South Korea	144 621 511	152 069 324	187 284 891	204 387 042	210 927 515
9	**MX**	Mexico	194 019 588	197 134 522	218 704 629	245 142 465	256 255 435
10	**NZ**	New Zealand	14 989 230	13 109 453	12 235 954	10 528 886	10 939 122
11	**US**	United States of America		1 077 096 334	1 149 189 023	1 115 270 398	1 154 434 603
12	**VE**	Venezuela	30 248 386	28 195 146	27 119 596	27 261 651	29 592 206

Source: European Audiovisual Observatory / LUMIERE, Rentrak

20. Estimated LUMIERE coverage rate of individual markets 2010-2014

Estimated LUMIERE coverage by territory

In %.

		Territory	2010	2011	2012	2013	2014
EUROPE							
1	**AT**	Austria	100	100	100	100	100
2	**BA**	Bosnia-Herzegovina	-	100	-	-	-
3	**BE**	Belgium	90	81	87	83	47
4	**BG**	Bulgaria	100	100	100	99	99
5	**CH**	Switzerland	99	99	99	99	98
6	**CY**	Cyprus	2	1	1	1	100
7	**CZ**	Czech Republic	100	99	99	99	99
8	**DE**	Germany	96	97	97	97	98
9	**DK**	Denmark	100	87	100	100	99
10	**EE**	Estonia	100	100	100	98	99
11	**ES**	Spain	100	99	100	100	100
12	**FI**	Finland	100	100	100	99	100
13	**FR**	France	96	95	95	92	91
14	**GB**	United Kingdom	100	100	100	100	100
15	**GR**	Greece	100	100	98	100	99
16	**HR**	Croatia	7	94	95	100	100
17	**HU**	Hungary	86	100	100	94	100
18	**IE**	Ireland	-	-	-	-	-
19	**IS**	Iceland	1	-	2	1	99
20	**IT**	Italy	91	79	92	91	92
21	**LI**	Liechtenstein	10	-	-	-	-
22	**LT**	Lithuania	100	97	4	100	100
23	**LU**	Luxembourg	9	14	13	6	35
24	**LV**	Latvia	97	98	98	1	99
25	**ME**	Montenegro (from June 2006)	-	-	-	-	100
26	**MK**	Former Yugoslav Republic of Macedonia	-	-	-	-	99
27	**NL**	Netherlands	99	99	93	99	99
28	**NO**	Norway	98	99	98	98	98
29	**PL**	Poland	99	99	99	99	99
30	**PT**	Portugal	100	99	99	99	99
31	**RO**	Romania	99	73	99	99	99
32	**RU**	Russian Federation	100	100	100	100	100
33	**SE**	Sweden	100	99	100	99	99
34	**SI**	Slovenia	99	98	96	92	95
35	**SK**	Slovakia	91	98	99	99	99
36	**TR**	Turkey	100	99	100	99	99
OUTSIDE OF EUROPE							
1	**AR**	Argentina	100	96	100	100	96
2	**AU**	Australia	100	93	94	90	98
3	**BR**	Brazil	100	93	92	94	99
4	**CA**	Canada	-	100	99	91	95
5	**CL**	Chile	100	100	100	100	100
6	**CN**	China	-	-	-	-	95
7	**CO**	Colombia	93	92	94	94	98
8	**KR**	South Korea	98	95	96	95	98
9	**MX**	Mexico	100	96	95	98	100
10	**NZ**	New Zealand	97	92	83	71	73
11	**US**	United States of America	90	90	93	91	100
12	**VE**	Venezuela	100	93	92	90	98

Source: European Audiovisual Observatory / LUMIERE, Rentrak

21. EUR INC films considered as European films in this report

As mentioned in the methodological remarks in chapter 2, European films financed with incoming US investment („EUR inc films“) are by default not counted as European but rather US films in the context of this report. The following EUR inc films however represent an exception to this rule as they feature as European films in the European Commission's Executive Agency EAC's film database (https://eacea.ec.europa.eu/mediaPgm/tabsMenu.do) and / or in Europa Cinema's film database (http://www.europa-cinemas.org/en/Resources/Film-Database).

Please note that Observatory's „INC“ classification is not based on the same criteria as the British Film Institute's classification of „inward investment“ films in the UK. The Observatory's „INC“ classification is more restrictive and counts less films as „GB“ or „GB inc“ films than the BFI counts „UK films“.

EUR INC films considered as European films in this report - 2014

N°	Film	COO (FINAL)	Prod Year	Director	ADM Outside Europe - 2014
1	The Quiet Ones	GB INC / US	2014	John Pogue	1 803 756
2	Redemption	GB INC / US	2013	Steven Knight	1 035 770
3	Under the Skin	GB INC / US / CH	2013	Jonathan Glazer	348 703
4	Locke	GB INC / US	2013	Steven Knight	177 761
5	Seven Psychopaths	GB INC / US	2012	Martin McDonagh	2 874
6	Hyde Park on Hudson	GB INC / US	2012	Roger Michell	2 482
7	Rush	GB INC / US / DE	2013	Ron Howard	924

Source: European Audiovisual Observatory / LUMIERE, Rentrak

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76 Allée de la Robertsau – 67000 Strasbourg, France
Tel.: +33(0)3 90 21 60 00, Fax: +33(0)3 90 21 60 19
E-mail: info.obs@coe.int, Website: http://www.obs.coe.int

The Theatrical Market for European Films Outside Europe

Key Figures 2014

This report provides a high level analysis of the theatrical markets for European films outside Europe based on admissions data for 12 non-European markets including the North American market, five Latin American markets, China and South Korea in Asia as well as Australia and New Zealand in Oceania. The analysis focuses on 2014 data but is complemented by five-year data series for the period 2010 to 2014 for all major indicators.

The report addresses in particular the following research questions:

- How many European films are theatrically released outside Europe?
- How many admissions and GBO do they generate?
- What is their market share in the respective non-European markets?
- What are the most important theatrical „export" markets for European films?
- Which European countries „export" how many films and how do they perform?
- How important is the theatrical exploitation outside Europe for European films?
- What were the 100 top performing European films?

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