

## 05/05/2015 : Press release - Box office up in the European Union in 2014 as European films break market share record

- EU gross box office increased marginally by 0.6% to EUR 6.32 billion in 2014
- Latest instalments of *The Hobbit* and *The Hunger Games* topped the EU charts
- Market share for European films reached record high of 33.6% (highest recorded since 1996)
- EU film production continued its rise to over 1 600 feature films
- Digital screen penetration almost complete: 92% of EU screens converted to digital by end 2014

### EU gross box office slightly up in 2014

Based on provisional data the European Audiovisual Observatory estimates that gross box office takings in the 28 EU Member States increased marginally to EUR 6.32 billion in 2014, up EUR 40 million on 2103. This is 0.6% higher than the previous year but still represents the second lowest level in the past five years. As in 2013 GBO growth was proportional to the change in underlying admissions which grew modestly by 0.7% to an estimated 911 million tickets sold, around 6.5 million more than in 2013. This indicates that the pan-European average ticket price – measured in Euros – has remained more or less stable at EUR 6.9 since 2012.

Measured in local currencies GBO increased in a total of 14 and decreased in 13 out of the 27 EU member states for which data are available. The small growth in cumulative EU box office (in EUR) was primarily ensured by strong year-on-year performances in France, Spain (+EUR 15 million, +3.0%) and Poland (+EUR 15 million, +9.7%) as well as the appreciation of the British Pound which led to an increase in the Euro value of UK GBO, despite a 2.3% decrease when measured in GBP. At the other end of the spectrum, the largest declines in GBO – in absolute terms – were registered in Italy (-EUR 46 million, -7.1%) and Germany (-EUR 43 million, -4.2%).

Outside of the EU, the Russian Federation confirmed its position as the second largest European market in terms of admissions with 175 million tickets sold and a GBO of RUB 43.3 billion, a 2.4% increase on 2013. While Russian box office growth seems to have somewhat levelled out, Turkey continued its impressive growth trend of recent years with admissions jumping to 61.4 million, up 22% from 2013 and GBO increasing to TRY 655 million (+30%), the highest level in the past few decades. Both markets however faced sharp declines in their currencies in 2014, so that GBO measured in EUR actually declined by 14% to EUR 862 million in the case of Russia and by 2.5% to EUR 189 million in the case of Turkey.

### ***The Hobbit, The Hunger Games and How to Train Your Dragon* sequels top the European Union charts in 2014**

As in previous years, sequels and spin-offs featured prominently in the 2014 European Union box office charts. Led by *The Hobbit: The Battle of the Five Armies* (22.7 mio. admissions), *The Hunger Games: Mockingjay – Part 1* (20.1 mio.) and *How to Train Your Dragon 2* (17.5 mio.) a total of nine sequels or spin-offs made it into the top 20, five of them into the top 10.

French culture clash comedy *Qu'est-ce qu'on a fait au Bon Dieu (Serial (Bad) Weddings)* and Luc Besson's sci-fi thriller *Lucy* stood out among European films, selling 17.1 and 15.2 million tickets in the EU respectively. Other exceptionally successful films include the Spanish comedy *Ocho apellidos vascos (Spanish Affair)*, which became the highest grossing Spanish film of all time, and British family comedy *Paddington*, both of which made it into the list of the 25 top grossing films in 2014.

It is interesting to note that, just as in 2013, the top blockbusters attracted significantly fewer cinema-goers than in the previous years, if one compares them, for example, with the 42.7 million admissions for *Skyfall* (2012) or 38.0 million for *Harry Potter and the Deathly Hollows: Part 2* (2011) and 51.9 million for *Avatar* (2010). Cumulative admissions to European films on the other hand increased and became the main driver behind the overall growth in cinema attendance in the EU.

**Table 1: GBO, admissions and national market share in European countries 2013 – 2014**

| Country  | Admissions<br>(in million) |              |            | Change<br>% | Currency   | GBO<br>(in million EUR) |              |             | National<br>share<br>2013 |
|--|----------------------------|--------------|------------|-------------|------------|-------------------------|--------------|-------------|---------------------------|
|  | 2013                       | 2014<br>prov |            |             |            | 2013                    | 2014<br>prov | Change<br>% |                           |
| <b>European Union member countries (EU 28)</b> |                            |              |            |             |            |                         |              |             |                           |
| AT   | Austria <sup>est</sup>     | 15.2         | 14.1       | -7.1%       | EUR        | 124.6                   | 117.9        | -5.4%       | 4.2%                      |
| BE   | Belgium <sup>est</sup>     | 20.9         | 21.6       | 3.3%        | EUR        | 154.7                   | 158.4        | 2.4%        | ~                         |
| BG   | Bulgaria                   | 4.8          | 4.9        | 2.3%        | BGN        | 39.8                    | 41.1         | 3.2%        | 0.9%                      |
| CY   | Cyprus <sup>est</sup>      | 0.7          | 0.7        | 2.1%        | EUR        | 5.0                     | 5.1          | 1.8%        | 0.1%                      |
| CZ   | Czech Republic             | 11.1         | 11.6       | 4.5%        | CZK        | 1 424.2                 | 1 462.7      | 2.7%        | 24.2%                     |
| DE   | Germany                    | 129.7        | 121.7      | -6.1%       | EUR        | 1 023.0                 | 979.7        | -4.2%       | 26.2%                     |
| DK   | Denmark                    | 12.9         | 12.2       | -5.2%       | DKK        | 1 025.1                 | 991.7        | -3.3%       | 30.2%                     |
| EE   | Estonia                    | 2.6          | 2.6        | 1.6%        | EUR        | 11.8                    | 12.8         | 8.0%        | 5.9%                      |
| ES   | Spain <sup>est</sup>       | 77.0         | 87.4       | 13.6%       | EUR        | 507.2                   | 522.5        | 3.0%        | 13.5%                     |
| FI   | Finland                    | 7.8          | 7.3        | -6.4%       | EUR        | 76.0                    | 71.6         | -5.8%       | 23.4%                     |
| FR   | France                     | 193.6        | 208.4      | 7.7%        | EUR        | 1 250.0                 | n.c.         | ~           | 33.8%                     |
| GB <sup>2)</sup>                               | United Kingdom             | 165.5        | 157.5      | -4.9%       | GBP        | 1 083.0                 | 1 058.0      | -2.3%       | 22.2%                     |
| GR   | Greece <sup>est</sup>      | 9.2          | 9.0        | -2.6%       | EUR        | 59.3                    | 58.0         | -2.2%       | 7.2%                      |
| HR   | Croatia                    | 4.2          | 3.8        | -9.7%       | HRK        | 121.0                   | 110.6        | -8.6%       | 11.1%                     |
| HU   | Hungary <sup>est</sup>     | 10.1         | 11.0       | 8.4%        | HUF        | 13 490.0                | 14 601.6     | 8.2%        | 1.3%                      |
| IE   | Ireland <sup>est</sup>     | 14.7         | 14.4       | n.c.        | EUR        | 102.8                   | 100.4        | n.c.        | 0.9%                      |
| IT   | Italy <sup>est</sup>       | 105.7        | 99.3       | -6.1%       | EUR        | 646.3                   | 600.5        | -7.1%       | 31.0%                     |
| LT   | Lithuania                  | 3.3          | 3.2        | -0.7%       | EUR        | 13.1                    | 14.4         | 9.8%        | 16.5%                     |
| LU   | Luxembourg <sup>est</sup>  | 1.2          | 1.1        | -6.5%       | EUR        | 9.1                     | 8.5          | -6.1%       | ~                         |
| LV   | Latvia                     | 2.4          | 2.3        | -2.8%       | LVL        | 10.3                    | 10.2         | -1.3%       | 6.0%                      |
| MT   | Malta <sup>est</sup>       | 0.7          | n.c.       | ~           | EUR        | 4.0                     | n.c.         | ~           | 3.6%                      |
| NL   | Netherlands                | 30.8         | 30.8       | -0.2%       | EUR        | 249.5                   | 249.9        | 0.1%        | 20.6%                     |
| PL   | Poland                     | 36.3         | 40.5       | 11.4%       | PLN        | 665.1                   | 727.8        | 9.4%        | 20.3%                     |
| PT   | Portugal                   | 12.5         | 12.1       | -3.7%       | EUR        | 65.5                    | 62.7         | -4.2%       | 3.4%                      |
| RO   | Romania                    | 9.0          | 10.2       | 12.4%       | RON        | 160.5                   | 185.2        | 15.4%       | 2.8%                      |
| SE   | Sweden                     | 16.6         | 16.3       | -1.8%       | SEK        | 1 644.1                 | 1 654.0      | 0.6%        | 26.7%                     |
| SI   | Slovenia                   | 2.3          | 1.9        | -17.4%      | EUR        | 11.1                    | 9.5          | -13.9%      | 1085.0%                   |
| SK   | Slovakia                   | 3.7          | 4.1        | 10.8%       | EUR        | 19.0                    | 20.9         | 9.8%        | 4.4%                      |
| <b>EU 28 Total<sup>est</sup></b>               |                            | <b>905</b>   | <b>911</b> | <b>0.7%</b> | <b>EUR</b> | <b>6 282</b>            | <b>6 322</b> | <b>0.6%</b> | <b>~</b>                  |
| <b>Other European countries</b>                |                            |              |            |             |            |                         |              |             |                           |
| BA   | Bosnia Herzegovina         | 0.9          | 0.9        | -3.4%       | BAM        | 4.9                     | 4.5          | -8.3%       | 0.6%                      |

**Table 2: Top 20 films by admissions in the European Union in 2014** prov

| Rank | Original title  | Country of origin | Production Year | Director                      |
|------|---|-------------------|-----------------|-------------------------------|
| 1    | The Hobbit: The Battle of the Five Armies                   | US / NZ INC       | 2014            | Peter Jackson                 |
| 2    | The Hunger Games: Mockingjay - Part 1                       | US                | 2014            | Francis Lawrence              |
| 3    | How to Train Your Dragon 2                                  | US                | 2014            | Dean DeBlois                  |
| 4    | The Wolf of Wall Street <sup>(1)</sup>                      | US                | 2013            | Martin Scorsese               |
| 5    | Qu'est-ce qu'on a fait au Bon Dieu? (Serial (Bad) Weddings) | FR                | 2014            | Philippe de Chavouette        |
| 6    | Lucy  | FR                | 2014            | Luc Besson                    |
| 7    | Dawn of the Planet of the Apes                              | US                | 2014            | Matt Reeves                   |
| 8    | Rio 2   | US                | 2014            | Carlos Saldaña                |
| 9    | Maleficent  | US / GB INC       | 2014            | Robert Stromberg              |
| 10   | Interstellar  | US / GB           | 2014            | Christopher Nolan             |
| 11   | Guardians of the Galaxy                                     | US / GB INC       | 2014            | James Gunn                    |
| 12   | Transformers: Age of Extinction                             | US / CN           | 2014            | Michael Bay                   |
| 13   | X-Men: Days of Future Past                                  | US                | 2014            | Bryan Singer                  |
| 14   | The Lego Movie  | US / AU / DK      | 2014            | Phil Lord, Christopher Miller |
| 15   | The Amazing Spider-Man 2                                    | US                | 2014            | Marc Webb                     |
| 16   | Gone Girl   | US                | 2014            | David Fincher                 |
| 17   | Captain America: The Winter Soldier                         | US                | 2014            | Anthony Russo                 |
| 18   | Ocho apellidos vascos (Spanish Affair)                      | ES                | 2014            | Emilio Martínez Lapeña        |
| 19   | Frozen <sup>(2)</sup>                                       | US                | 2013            | Chris Buck, Peter Dinklage    |
| 20   | 12 Years a Slave  | US / GB           | 2013            | Steve McQueen                 |

(1) 217 374 admissions in the EU in 2013.

(2) 18 626 680 admissions in the EU in 2013.

Note: 'inc' refers to films produced with incoming investment from the US.

**Table 3: Top 20 European films by admissions in the European Union in 2014** prov

| Rank | Original title   | Country of origin | Production Year | Director      |
|------|--|-------------------|-----------------|---------------|
| 1    | Qu'est-ce qu'on a fait au Bon Dieu? (Serial (Bad) Weddings)          | FR                | 2014            | Philippe de   |
| 2    | Lucy   | FR                | 2014            | Luc Besson    |
| 3    | Ocho apellidos vascos (Spanish Affair)                               | ES                | 2014            | Emilio Marti  |
| 4    | Paddington   | GB / FR           | 2014            | Paul King     |
| 5    | Supercondriaque (Superchondriac)                                     | FR / BE           | 2014            | Dany Boon     |
| 6    | The Inbetweeners Movie 2   | GB                | 2014            | Damon Bee     |
| 7    | Les vacances du petit Nicolas  | FR                | 2014            | Laurent Tira  |
| 8    | Hundraåringen som klev ut genom fönstret och försvann <sup>(1)</sup> | SE                | 2013            | Felix Herngr  |
| 9    | The Physician <sup>(2)</sup>   | DE                | 2013            | Philipp Stölz |
| 10   | Samba  | FR                | 2014            | Olivier Naka  |
| 11   | The House of Magic <sup>(3)</sup>                                    | BE                | 2013            | Jeremy Deg    |
| 12   | Beauty and the Beast   | FR / DE           | 2014            | Christophe    |
| 13   | Philomena <sup>(4)</sup>   | GB / US / FR      | 2013            | Stephen Fre   |
| 14   | El Niño  | ES                | 2014            | Daniel Monz   |
| 15   | Babysitting  | FR                | 2014            | Nicolas Ben   |
| 16   | Les trois frères, le retour  | FR                | 2014            | Didier Bour   |
| 17   | Vaterfreuden (Joy of Fatherhood)                                     | DE                | 2014            | Matthias Sc   |
| 18   | Astérix: Le domaine des dieux  | FR                | 2014            | Louis Clichy  |
| 19   | La famille Bélier (The Bélier Family)                                | FR / BE           | 2014            | Eric Lartiga  |
| 20   | Bogowie (Gods)   | PL                | 2014            | Lukasz Palk   |

(1) 484 415 admissions in the EU in 2013.

(2) 1 399 196 admissions in the EU in 2013.

(3) 448 650 admissions in the EU in 2013.

(4) 2 200 849 admissions in the EU in 2013.

## Market share for European films reaches record high

Admissions growth was driven primarily by the success of European films while several US blockbusters did not meet expectations and caused the market share for US films to drop from its record level of 69.5% in 2013 to 63.1%. The estimated market share for European films in the EU on the other hand leapt from 26.2% to 33.4%. This is the highest level since the Observatory started to calculate European market share in 1996. This figure excludes European films produced in Europe with incoming US investment which registered their weakest market share in recent history taking just over 0.3% of total admissions.

**Table 4: EU market share by region of origin 2010 – 2014** prov

In % of total admissions. Estimated.

| Region of origin | 2010  | 2011  | 2012  |
|------------------|-------|-------|-------|
| US               | 68.2% | 61.6% | 62.3% |
| EUR inc / US     | 5.0%  | 8.1%  | 6.9%  |
| Europe           | 25.4% | 28.5% | 29.3% |
| Other            | 1.4%  | 1.8%  | 1.5%  |

Source:

## EU film production volume continues to grow

EU production levels have been steadily increasing over the past decades. This trend continued in 2014, as the estimated number of European feature film productions increased from 1 587 to 1 603 films. This represents yet another record high and breaks down into an estimated 1 118 feature fiction films and 485 feature documentaries. About 32% of European feature films were produced as co-productions while 68% were national productions.

**Table 5: Number of feature films produced in the European Union 2010 – 2014** est

Estimated

| Type of production                           | 2010         | 2011         | 2012         |
|--|--------------|--------------|--------------|
| Feature fiction films <sup>est (1)</sup>     | 1 072        | 1 073        | 1 092        |
| Feature documentaries <sup>est (1)</sup>     | 427          | 453          | 462          |
| <b>Total feature films<sup>est (1)</sup></b> | <b>1 499</b> | <b>1 526</b> | <b>1 554</b> |

(1) Restated data series. May double count minority co-produced feature documentaries.

Source:

## 92% of EU screens converted to digital

According to figures provided by MEDIA Salles a total of 1 858 additional EU screens converted to digital projection systems in 2014, bringing the total to 27 899 digital screens. This means that by the end of 2014 about 92% of the EU's total screen base had been digitised. Only five Member States registered digital screen penetration rates below 70%, including the Czech Republic (53%), Greece (38%) and the Baltic States.

**Table 6: Digital screens in the European Union 2010 – 2014**

Estimated

|   | 2010  | 2011   | 2012   |
|---|-------|--------|--------|
| New digital screens                                     | 4 640 | 7 041  | 5 860  |
| Total digital screens as of Dec. 31                     | 8 785 | 15 826 | 21 686 |
| Digital screen penetration as of Dec. 31 <sup>est</sup> | 14%   | 54%    | 72%    |

Source: M

More detailed information on European as well as international theatrical markets can be found in [FOCUS 2015 World Film Market Trends](#) prepared by the European Audiovisual Observatory for the Cannes Film Market.

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#### **Notes for Editors:**

- Data have been collected with the collaboration of the EFARN (European Film Agency Research Network).
- All 2014 figures are provisional.

#### **The European Audiovisual Observatory, Council of Europe**

Set up in December 1992, the European Audiovisual Observatory's mission is to gather and distribute information on the audiovisual industry in Europe. The Observatory is a European public service body comprised of 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 industry and with a network of correspondents. In addition to contributions to conferences, other major activities are the publication of a Yearbook, newsletters and reports, the compilation and management of databases and the provision of information through the Observatory's Internet site (<http://www.obs.coe.int>).

#### **European Union admissions rankings (Tables 2 and 3)**

The pan-European film rankings shown in tables 2 and 3 are based on data from all European Union countries for which results have been stored in the LUMIERE database as of 20<sup>th</sup> April 2015. This database on admissions to films released in Europe is available on-line and free-of-charge, and is the result of collaboration between the European Audiovisual Observatory and various specialised national sources as well as the MEDIA Programme of the European Union. LUMIERE provides country-by-country analysis of admissions for about 35 500 films in distribution in Europe since 1996. Partial 2014 data for 24 European countries is now available, including data for the major European Union markets, as well as data for the North American market.

#### **Market shares (Table 4)**

The market shares shown in this figure are based on an analysis of results of films released in member states of the European Union for which admissions data for individual films are made available to the European Audiovisual Observatory. In order to draw up such market shares, a single 'country of origin' must be attributed to each film, an attribution that can prove difficult in the case of international productions. In these cases the Observatory's aim is to attribute a country of origin corresponding to the source of the majority financial input and/or creative control of the project. Since 2005 the Observatory has identified specifically films that have been produced in one or more European countries (or elsewhere) with US investment by using the reference 'inc' (incoming investment) in the country of origin attribution. It should be noted, however, that the availability of further information may occasionally lead to changes in the attribution of country of origin and that the origin of a film as attributed in the LUMIERE database may not always be identical with that indicated by national sources.

The provisional data on market shares in the European Union in 2014 shown in table 4 are based on the data on admissions to individual films as collected in the LUMIERE database on 20<sup>th</sup> April 2015. At this date the coverage rate of the database for admissions in the 24 European Union countries for which data is available was of around

95%. Due to various gaps in data collection and delivery in various countries, coverage of 100% of admissions is currently unachievable.

**Number of feature films produced in the European Union (Table 5)**

Estimating the total volume of production of feature films in the European Union remains difficult, chiefly due to the risk of double counting of co-productions and to differing national methodologies for the collection of this data. Included in the total for the European Union are feature-length films intended for theatrical exploitation, excluding minority co-productions and US and foreign production in the United Kingdom. For some countries no separate data are available for feature fiction and feature documentary films.