The circulation of European films in non-national markets

Key figures 2019

LUMIERE

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Key figures 2019

Director of publication
Susanne Nikoltchev
Executive Director, European Audiovisual Observatory

Author
Patrizia Simone
Film Analyst, Department for Market Information, European Audiovisual Observatory
patrizia.simone@coe.int

Supervising editors
Martin Kanzler
Film Analyst, Department for Market Information, European Audiovisual Observatory
Gilles Fontaine
Head of the Department for Market Information, European Audiovisual Observatory

Proofreading
Anthony Mills

Translators
France Courrèges, Roland Schmid

Press and Public Relations
Alison Hindhaugh, European Audiovisual Observatory, alison.hindhaugh@coe.int

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EXECUTIVE SUMMARY

This report focuses on the theatrical exploitation of European films in non-national markets, namely theatrical film exports. It should be kept in mind that the theatrical window is only one out of, broadly speaking, four market segments: additionally, TV, video and VOD – which may also hold market potential for European films but cannot be quantified due to a lack of availability of corresponding consumption data.

Theatrical export market volume of European films in 2019

In 2019, an estimated total of 3 954 European films were on theatrical release in at least one non-national market, in the sample covered in this report (see Figure 1 overleaf). This is the largest number of non-national European films on release in the past five years, and represents about 51% of the total number of European films tracked as on release worldwide.

These 3 954 films cumulatively generated about 180 million admissions in non-national markets worldwide in 2019, representing 41% of total admissions to European films tracked worldwide. These levels are well in line with 2016 and 2018 but significantly below the values registered in 2015 and 2017 (see Figure 2).

Out of the 180 million total ticket sales for European export films, 86 million were generated in non-national European markets, down from 94 million in 2018, marking a five-year low. This corresponds to 19% of all admissions to European films worldwide.

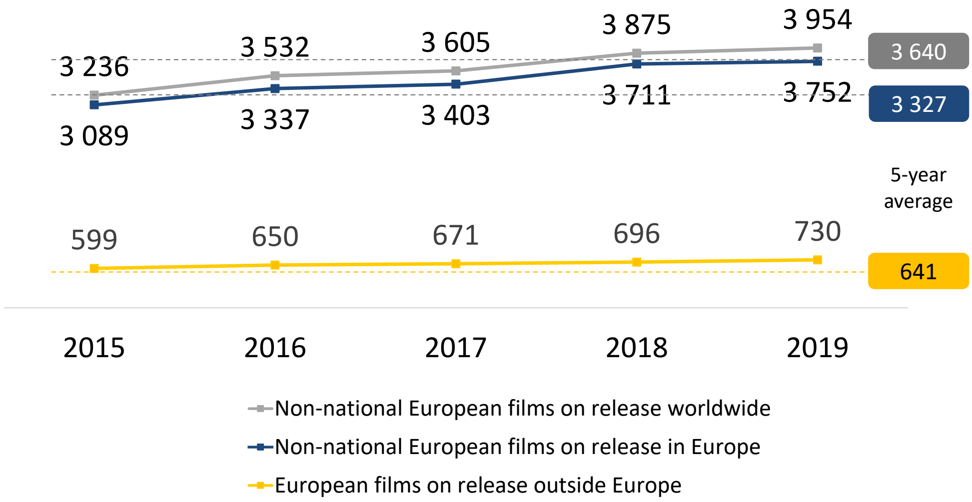
Outside Europe, European films sold a total of 94 million tickets in 2019 (8 million more than in 2018), accounting for 52% of total export admissions for the year, and for 21% of all admissions to European films worldwide.

Applying local average ticket prices for individual markets, European films generated an estimated EUR 1.2 billion in gross box office outside their home markets. This figure accounts for 43% of the estimated total box office takings for European films worldwide in 2019.

In European territories, European film exports accounted for 34% of the tracked number of films on release in 2019, and 7% of total admissions for the same year. Outside Europe, European films represented 18% of titles on theatrical release in the 14 sample markets included in this report, taking 2% of admissions. These figures are in line with the five-year averages.

Figure 1. Number of non-national European films on release (2015-2019)

As tracked in LUMIERE

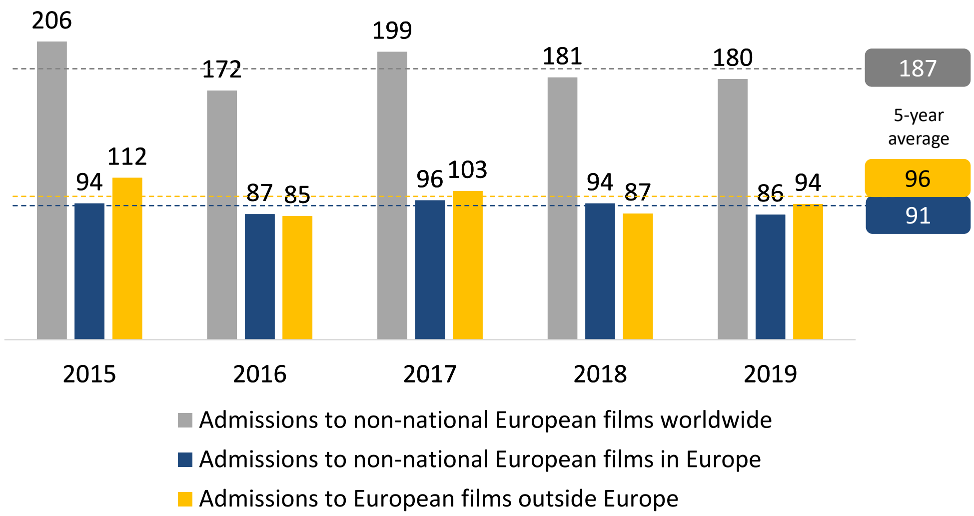


Note: Limited or no data were available for certain years and markets (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG and VE). Data sample does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019. These constraints do not limit the comparability of the number of films on release over the past five years, due to the low number of European films exclusively on release in these markets and nowhere else.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Figure 2. Admissions to non-national European films (2015-2019)

In millions; As tracked in LUMIERE with the exception of estimated admissions for HK, JP and SG for 2015 and 2016



Note: Limited or no data were available for certain markets (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG and VE) and years (i.e. this table does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019). These constraints do not limit the comparability of the share of films on release over the past five years, due to the low number of European films exclusively on release in these markets and nowhere else.

Source: European Audiovisual Observatoy / LUMIERE, Comscore.

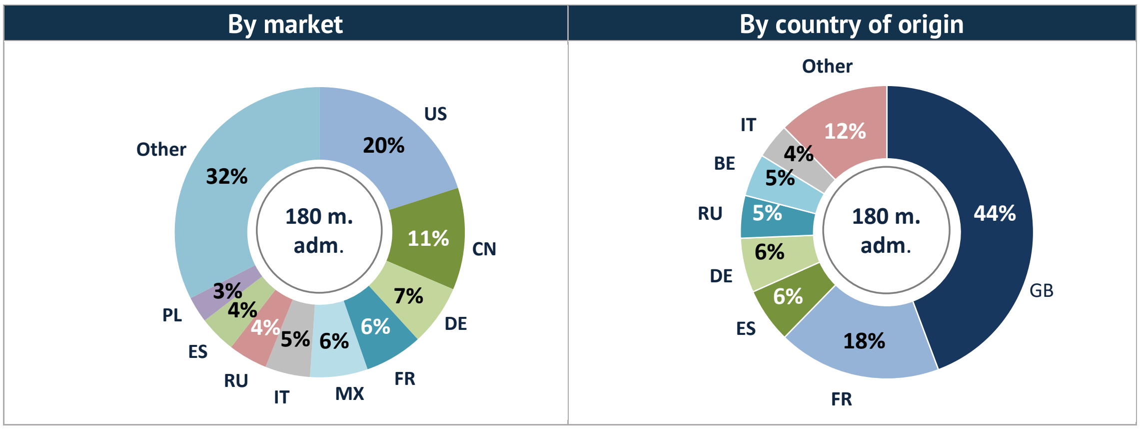
US confirms its position as largest export market for European films in terms of admissions

The comparatively strong performance of European export films outside Europe in 2019 can be ascribed to the growth in admissions generated in the US, which confirmed its position as the largest export market for European films in terms of ticket sales. Growing 36% on 2018, European films sold 36.1 million tickets in the US market, which represented 20% of total export admissions to European films for the year. This compares to 20.4 million admissions in China (11%) where ticket sales to European films dropped below the five-year average. Following at a clear distance, and accounting for 7% (12.2 million admissions), Germany took rank three, ahead of France (11.6 million) and Mexico (11.5 million).

Thanks to a comparatively high average ticket price, the US also confirmed its position as by far the largest export market for European films in terms of gross box office takings. Based on the data available, the Observatory estimates that European films took EUR 295 million at the US box office in 2019, accounting for 25% of total export GBO takings, followed at a distance by Germany (EUR 105 million, 9%), China (EUR 98 million, 8%), France (EUR 79 million, 7%) and Italy (EUR 58 million, 5%).

Figure 3. Admissions to European film exports by market and origin (2019)

Estimated; As tracked in LUMIERE



Source: European Audiovisual Observatory / LUMIERE, Comscore.

UK and French films dominated European film exports in 2019

Breaking European film exports down by country of origin, it is evident that UK and French films dominated European film exports in non-national markets: cumulatively they accounted for 37% of export films and 62% of total export admissions to European films in 2019. Outside Europe, UK and French films cumulatively accounted for more than half (53%) of European film offerings, generating 64% of total admissions to European films.

UK films took the lion's share, comprising 44% of total export admissions to European films worldwide, despite representing only 13% of European film exports on release in 2019. Conversely, French export films (24% of export films on release) performed comparatively poorly, accounting for only 18% of global non-national admissions to European films.

This dominance of UK films is also reflected in the composition of the top 20 European films in terms of non-national admissions: UK films accounted for six out of the top 10 and nine out of the top 20 European export films in 2019.

About three out of four European film exports were released in only one or two non-national markets, and nine of 10 films sold fewer than 50 000 non-national admissions

More than half (56%; 2 210 films) of the 3 954 European export films on theatrical release in 2019 were screened in only a single non-national territory . Another 677 films (17%) were on release only in two non-national markets. This means that almost three out of four European export films were screened in only one or two of the non-national markets. And it implies that the portfolio of European films on release in export markets varies largely from one territory to another. In fact, only 411 European films (10%) were on release in six or more non-national markets. These widely exported films cumulatively captured 78% of total export admissions to European films worldwide.

Nine out of 10 European export films (92%) generated fewer than 50 000 admissions in non-national markets, and 61% even captured fewer than 1 000 admissions. In 2019, only 31 non-national European film s generated at least 1 million ticket sales outside their home markets.

Downtown Abbey **(GB / US) was the most successful European export film, selling a total 17.2 million tickets in non-national markets in 2019**

A total of five European blockbusters generated more than 5 million ticket sales in non-national markets worldwide. The list was topped by UK historical drama *Downtown Abbey*, which was on release in 11 non-national markets where it sold 17.2 million tickets in 2019 (accounting for 10% of total export admissions to European films). UK comedy *Yesterday* (GB / US / RU / JP) came in second with 15.5 million non-national admissions, followed by *Cold Pursuit* (GB / US / FR / CN / NO / CA; 8.7 million), *The Favourite* (GB INC / US / IE; 6.8 million) and *The Queen's Corgi* (BE / US; 6.3 million).

Cumulatively, the top 10 European export films accounted for 42% of total non-national admissions in all sample markets, the top 50 films for 71%, and the top 100 films for 81%.

SYNTHÈSE

Le présent rapport porte sur l'exploitation en salles des films européens sur leurs marchés non nationaux, autrement dit sur les exportations de films sortis en salles. Il convient de garder à l'esprit que la fenêtre d'exploitation en salles n'est, généralement parlant, qu'un des quatre segments de marché existants : les marchés de la télévision, de la vidéo et de la vidéo à la demande (VOD) peuvent également présenter un réel potentiel pour les films européens. Ils ne peuvent toutefois pas être quantifiés en raison du manque de données de consommation pertinentes.

Volume du marché à l'exportation des films européens distribués en salle en 2019

Il est estimé qu'un total de 3 954 films européens est sorti en salles en 2019 sur au moins un marché non national de l'échantillon couvert par le présent rapport (voir graphique 1 ci-après). Il s'agit du plus grand nombre de films européens non nationaux sortis en salles des cinq dernières années ; cela représente environ 51 % du nombre total de films européens suivis qui sont sortis en salles au niveau mondial.

Ces 3 954 films ont cumulativement généré quelque 180 millions d'entrées sur les marchés non nationaux au niveau mondial en 2019, soit 41 % des entrées totales réalisées au niveau mondial par les films européens suivis. Ces niveaux sont conformes à ceux observés en 2016 et 2018, mais nettement inférieurs aux valeurs enregistrées en 2015 et 2017 (voir graphique 2).

Sur ces 180 millions de billets vendus au total pour les films européens à l'exportation, 86 millions ont été générés sur les marchés européens non nationaux, contre 94 millions en 2018, ce qui représente leur plus bas niveau en cinq ans. Cela correspond à 19 % de l'ensemble des entrées des films européens au niveau mondial.

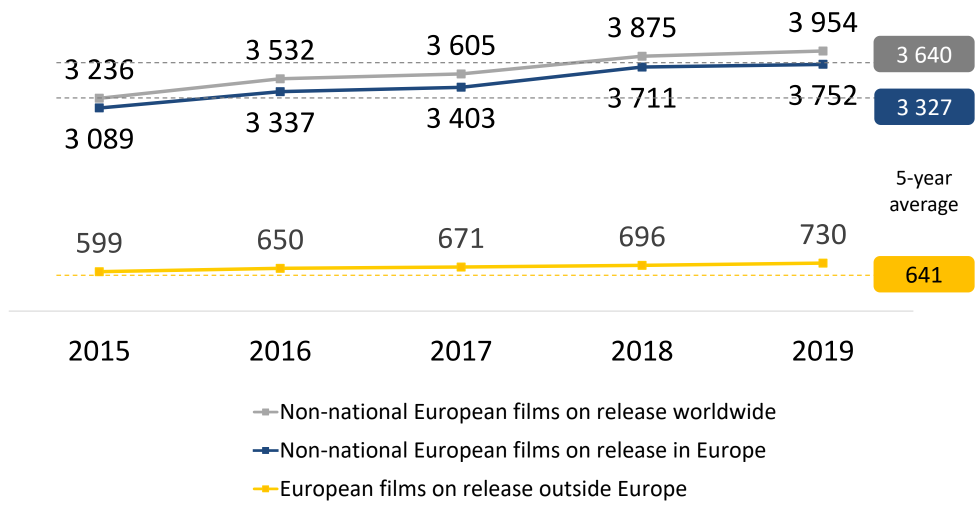
Hors d'Europe, les films européens ont vendu un total de 94 millions de billets en 2019 (8 millions de plus qu'en 2018), soit 52 % des entrées totales à l'exportation de l'année et 21 % des entrées totales réalisées par les films européens au niveau mondial.

En appliquant le prix moyen du billet local sur les différents marchés, il est estimé que les films européens ont généré 1,2 milliard d'EUR de recettes brutes au guichet hors de leur marché d'origine. Ce chiffre représente 43 % des recettes totales au guichet estimées des films européens au niveau mondial en 2019.

Dans les territoires européens, les films européens à l'exportation représentent 34 % du nombre de films sortis en salles suivis en 2019 et 7 % des entrées totales de la même année. Hors d'Europe, les films européens représentent 18 % des titres sortis en salle et 2 % des entrées sur les 14 marchés de l'échantillon inclus dans ce rapport. Ces chiffres sont conformes aux moyennes sur 5 ans.

Graphique 1 : Nombre de films européens non nationaux sortis en salles (2015-2019)

Selon LUMIERE.

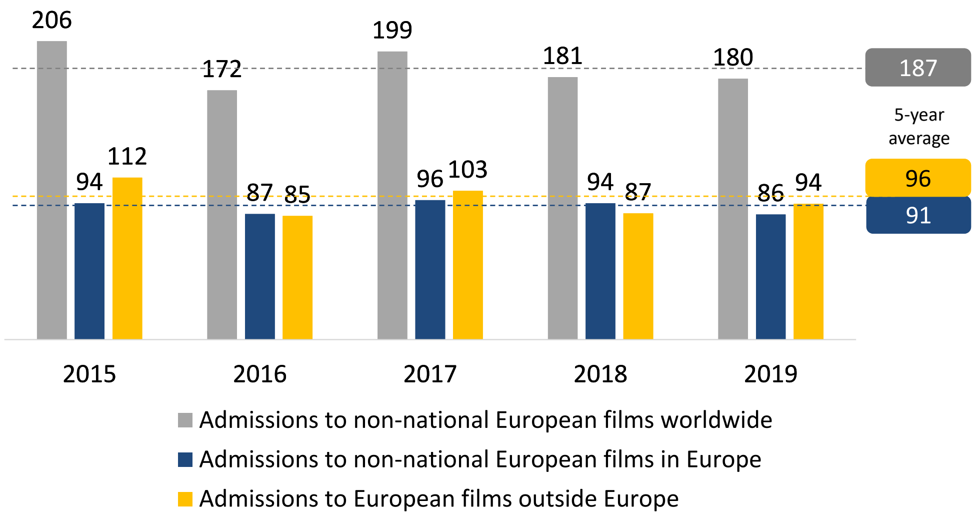


Remarque : les données pour certains marchés (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG et VE) et certaines années étaient limitées ou non disponibles. L'échantillon de données ne comprend pas les films européens sortis en salles exclusivement à HK, au JP ou à SG pour les années 2015 et 2016 et au VE pour 2019. Cela ne limite pas la comparabilité du nombre de films sortis en salles ces cinq dernières années compte tenu du faible nombre de films européens qui sont sortis en salles uniquement sur ces marchés et nulle part ailleurs.

Source : Observatoire européen de l'audiovisuel / LUMIERE, Comscore

Graphique 2 : Entrées réalisées par les films européens non nationaux (2015-2019)

En millions. Selon LUMIERE, à l'exception des entrées estimées pour HK, le JP et SG entre 2015 et 2016.



Remarque : les données pour certains marchés (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG et VE) et certaines années étaient limitées ou non disponibles (c'est-à-dire qu'elles ne comprennent pas les films européens sortis uniquement à HK, au JP ou à SG pour les années 2015 et 2016 et au VE pour 2019). Cela ne limite pas la comparabilité du nombre de films sortis en salles ces cinq dernières années compte tenu du faible nombre de films européens qui sont sortis en salles uniquement sur ces marchés et nulle part ailleurs.

Source : Observatoire européen de l'audiovisuel / LUMIERE, Comscore

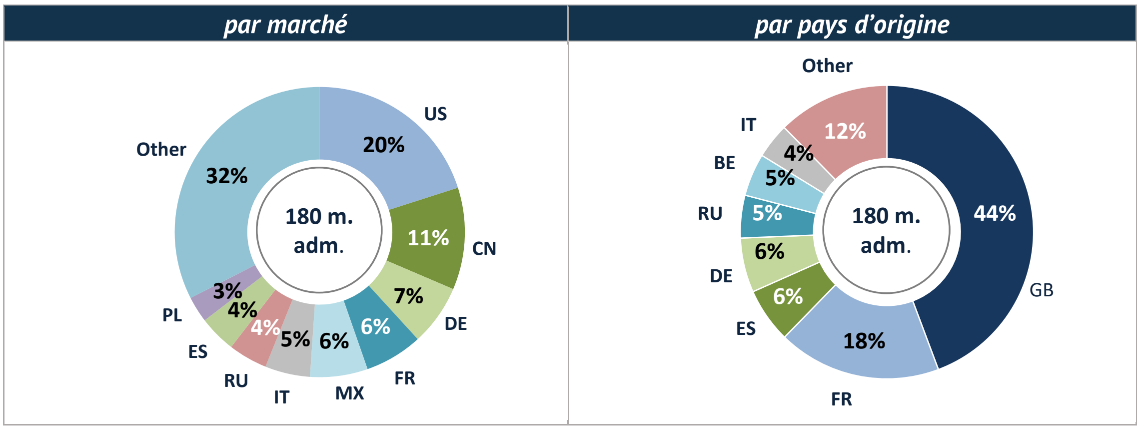
Les États-Unis confirment leur place de principal marché d'exportation pour les films européens, pour ce qui est de la fréquentation

Les performances relativement bonnes des films européens à l'exportation hors d'Europe en 2019 peuvent être attribuées à l'augmentation du nombre d'entrées générées aux États-Unis, qui ont confirmé leur position de principal marché d'exportation des films européens pour ce qui est des ventes de billets. Les films européens ont vendu 36,1 millions de billets aux États-Unis, en hausse de 36 % par rapport à 2018, ce qui représente 20 % du total des entrées à l'exportation des films européens pour l'année. À titre de comparaison, 20,4 millions d'entrées ont été enregistrées en Chine (11 %), où les ventes de billets pour les films européens ont été inférieures à la moyenne sur cinq ans. Loin derrière, l'Allemagne occupe la troisième place avec 7 % (12,2 millions), devant la France (11,6 millions) et le Mexique (11,5 millions).

Grâce à un prix moyen du billet relativement élevé, les États-Unis ont également confirmé leur position de principal marché d'exportation des films européens pour ce qui est des recettes brutes au guichet. Sur la base des données disponibles, l'Observatoire estime que les films européens ont rapporté 295 millions d'EUR de recettes brutes au guichet aux États-Unis en 2019, soit 25 % des recettes brutes au guichet totales générées à l'exportation, suivis de loin par l'Allemagne (105 millions d'EUR, 9 %), la Chine (98 millions d'EUR, 8 %), la France (79 millions d'EUR, 7 %) et l'Italie (58 millions d'EUR, 5 %).

Graphique 3 : Entrées réalisées par les films européens à l'exportation, par marché et par origine (2019)

Estimation. Selon LUMIERE.



Source : Observatoire européen de l'audiovisuel / LUMIERE, Comscore

Les films français et britanniques ont dominé les exportations de films européens en 2019

Si l'on ventile les exportations de films européens par pays d'origine, il est évident que les films français et britanniques dominent les exportations de films européens sur les marchés non nationaux : cumulativement, ils ont représenté 37 % des films à l'exportation et 62 % du nombre total des entrées à l'exportation réalisées par les films européens en 2019. Hors d'Europe, les films français et britanniques ont représenté cumulativement plus de la moitié (53 %) de l'offre de films européens, générant 64 % des entrées totales des films européens.

Les films britanniques se sont taillé la part du lion puisqu'ils représentent à eux seuls 44 % du total des entrées à l'exportation des films européens au niveau mondial, alors qu'ils ne représentent que 13 % des exportations de films européens sortis en salles en 2019. En revanche, les films français à l'exportation (24 % des films à l'exportation sortis en salles) ont enregistré des résultats comparativement mauvais, ne représentant que 18 % des entrées mondiales non nationales réalisées par les films européens.

Cette domination des films britanniques se reflète également dans la composition du top 20 des films européens pour ce qui est des entrées non nationales : en 2019, six des 10 premiers films et neuf des 20 premiers films européens à l'exportation étaient britanniques.

Près de trois films européens à l'exportation sur quatre sont sortis sur un ou deux marchés non nationaux seulement, et neuf films sur dix ont vendu moins de 50 000 entrées non nationales

Plus de la moitié (56 %, 2 210 films) des 3 954 films européens à l'exportation sortis en salles en 2019 n'ont été projetés que dans un seul territoire non national. 677 autres films (17 %) ne sont sortis que sur deux marchés non nationaux. Cela signifie que près de trois films européens à l'exportation sur quatre ont été projetés dans seulement un ou deux marchés non nationaux. Implicitement, cela révèle que le portefeuille de films européens sortis en salles sur les marchés d'exportation varie largement d'un territoire à l'autre. En fait, seuls 411 films européens (10 %) sont sortis sur au moins six marchés non nationaux. Les films qui ont été le plus largement exportés représentent cumulativement 78% du total des entrées à l'exportation des films européens au niveau mondial.

Neuf films européens à l'exportation sur dix (92 %) ont généré moins de 50 000 entrées sur les marchés non nationaux et 61 % ont même réalisé moins de 1 000 entrées. En 2019, seuls 31 films européens non nationaux ont réussi à vendre au moins 1 million de billets en dehors de leur marché d'origine.

***Downtown Abbey* (GB / US) a été le film européen à l'exportation qui a remporté le plus de succès avec un total de 17,2 millions de billets vendus sur les marchés non nationaux en 2019**

Au total, cinq superproductions européennes ont réussi à vendre chacune plus de 5 millions de billets sur les marchés non nationaux au niveau mondial. Ce palmarès est dominé par le drame historique britannique *Downtown Abbey*, qui est sorti sur 11 marchés non nationaux où il a vendu 17,2 millions de billets en 2019 (soit 10 % du total des entrées à l'exportation des films européens). La comédie britannique *Yesterday* (GB / US / RU / JP) arrive en deuxième position avec 15,5 millions d'entrées non nationales, suivie de *Cold Pursuit* (GB / US / FR / CN / NO / CA) (8,7 millions), *The Favourite* (GB INC / US / IE) (6,8 millions) et *The Queen's Corgi* (BE / US) (6,3 millions).

Cumulativement les 10 premiers films européens à l'exportation représentent 42 % du total des entrées non nationales dans l'ensemble des marchés de l'échantillon, les 50 premiers films, 71 % et les 100 premiers films, 81 %.

ZUSAMMENFASSUNG

Der Schwerpunkt dieses Berichts liegt auf der Verwertung europäischer Filme an nicht-nationalen Märkten im Kino, d.h. es geht um Kinofilmexporte. Dabei ist zu berücksichtigen, dass die Kinoverwertung nur eines von - allgemein gesagt - vier Marktsegmenten darstellt: Auch die TV-, Video- und VoD-Märkte können ein wichtiges Marktpotenzial für europäische Filme darstellen, doch quantitative Angaben dazu sind aufgrund fehlender einschlägiger Nutzungsdaten nicht möglich.

Volumen des Exportmarkts europäischer Filme 2019

Im Jahr 2019 wurden schätzungsweise insgesamt 3 954 europäische Filme in mindestens einem der in diesem Bericht erfassten nicht-nationalen Märkte der Datenprobe im Kino ausgewertet (siehe Abb. 1). Das ist die höchste Anzahl von nicht-nationalen europäischen Filmen, die in den letzten fünf Jahren im Kino gezeigt wurden; dies entspricht ca. 51 % sämtlicher europäischer Filme, die weltweit im Kino liefen.

Für diese 3 954 Filme wurden an nicht-nationalen Märkten 2019 weltweit insgesamt etwa 180 Mio. Kinokarten verkauft; das sind 41 % sämtlicher weltweit für europäische Filme verkauften Tickets. Diese Werte entsprechen denjenigen der Jahre 2016 und 2018, liegen aber deutlich unter dem Niveau der Jahre 2015 und 2017 (siehe Abb. 2).

Von den für europäische Exportfilme 180 Mio. verkauften Tickets entfielen 86 Mio. auf nicht-nationale europäische Märkte; das ist ein Fünfjahrestief - 2018 waren es noch 94 Mio. Dies entspricht 19 % aller Besucher europäischer Filme weltweit.

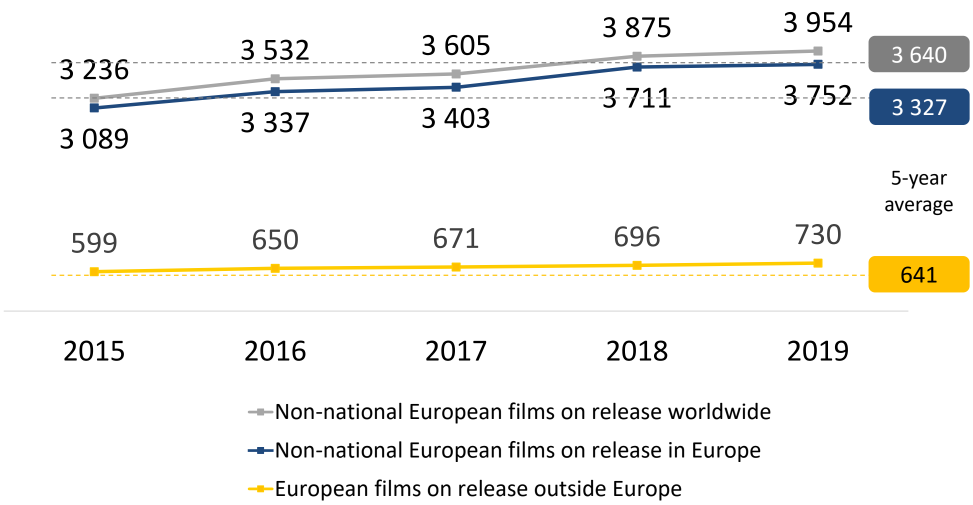
Außerhalb Europas wurden für europäische Filme 2019 insgesamt 94 Mio. Tickets verkauft (8 Mio. mehr als 2018); das entspricht 52 % sämtlicher Besucher exportierter Filme des Jahres bzw. 21 % der Besucher europäischer Filme weltweit.

Unter Ansatz lokaler durchschnittlicher Eintrittspreise an den einzelnen Märkten generierten europäische Filme außerhalb ihrer heimischen Märkte ein geschätztes Einspielergebnis in Höhe von EUR 1,2 Mrd. Dies entspricht 43 % der geschätzten Einspielergebnisse europäischer Filme weltweit im Jahr 2019.

Innerhalb Europas waren 2019 34 % der im Kino gezeigten Filme europäische Exportfilme; auf sie entfielen 7 % der Gesamtbesucherzahlen des Jahres. Außerhalb Europas waren 18 % der Titel, die in den 14 Märkten der Datenprobe dieses Berichts im Kino verwertet wurden, europäische Filme, die auf 2 % der Besucher kamen. Diese Zahlen decken sich mit den Durchschnittswerten der letzten 5 Jahre.

Abbildung 1: Anzahl nicht-nationaler europäischer Filme, die im Kino verwertet wurden (2015-2019)

Wie in LUMIERE hinterlegt.

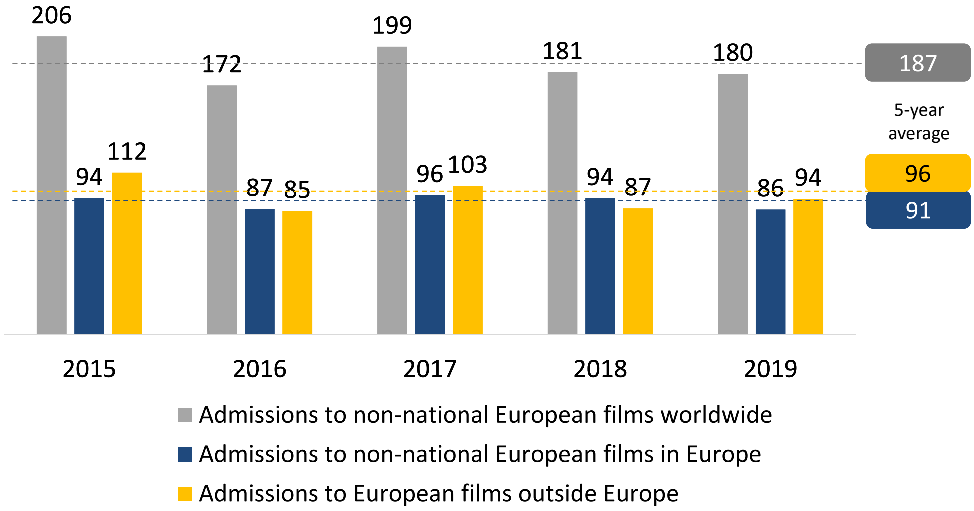


Hinweis: Für bestimmte Märkte (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG und VE) und Jahre standen nur begrenzte bzw. keine Daten zur Verfügung. Die keine europäischen Filme, die 2015 und 2016 ausschließlich in HK, JP oder SG sowie 2019 in VE im Kino verwertet wurden. Datenprobe enthält Dadurch ergibt sich keine Einschränkung der Vergleichbarkeit der Anzahl der Filme, die in den letzten fünf Jahren im Kino liefen, da es sich um eine geringe Anzahl von europäischen Filmen handelt, die ausschließlich an diesen Märkten und nirgendwo sonst im Kino gezeigt wurden.

Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE, Comscore

Abbildung 2: Besucherzahlen nicht-nationaler europäischer Filme (2015-2019)

in Mio. Wie in LUMIERE hinterlegt, ausgenommen die geschätzten Besucherzahlen für HK, JP und SG für 2015 und 2016



Hinweis: Für bestimmte Märkte (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG und VE) und Jahre standen nur begrenzte bzw. keine Daten zur Verfügung (d.h. europäische Filme, die 2015 und 2016 ausschließlich in HK, JP und SG sowie 2019 in VE im Kino verwertet wurden, sind hier nicht berücksichtigt.) Dadurch ergibt sich keine Einschränkung der Vergleichbarkeit der Besucheranteile der in den letzten fünf Jahren im Kino verwerteten Filme, da es sich um eine geringe Anzahl von Filmen handelt, die ausschließlich in diesen Märkten und nirgendwo sonst im Kino gezeigt wurden.

Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE, Comscore

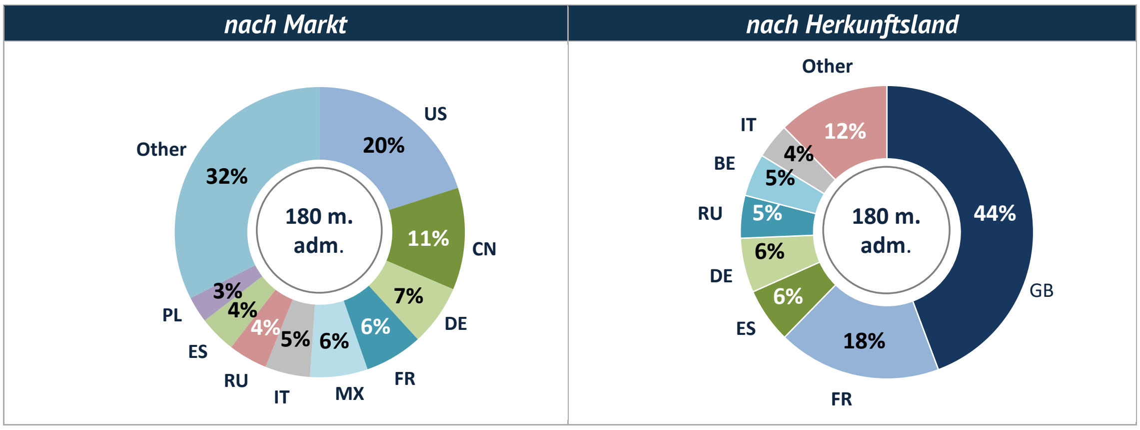
USA wieder größter Exportmarkt für europäische Filme, gemessen an Besucherzahlen

Das relativ gute Abschneiden europäischer Exportfilme außerhalb Europas 2019 lässt sich mit den gestiegenen Besucherzahlen in den USA erklären, die ihre Position als größter Exportmarkt für europäische Filme, gemessen an Besucherzahlen, bestätigen konnten. Für europäische Filme wurden 2018 am US-amerikanischen Markt 36,1 Mio. Tickets verkauft – 36 % mehr als im Vorjahr; das sind 20 % sämtlicher verkaufter Kinokarten für exportierte europäische Filme in diesem Jahr. Im Vergleich dazu wurden in China, wo die Zahl der verkauften Eintrittskarten für europäische Filme unter den 5-Jahresdurchschnitt fiel, 20,4 Mio. Tickets (11 %) verkauft. An dritter Stelle folgt mit deutlichem Abstand Deutschland mit 7 % (12,2 Mio.), vor Frankreich (11,6 Mio.) und Mexiko (11,5 Mio.).

Aufgrund der relativ hohen durchschnittlichen Eintrittspreise konnten die USA auch ihre Position als mit Abstand größter Exportmarkt für europäische Filme, gemessen an den Einspielergebnissen, halten. Ausgehend von den verfügbaren Daten schätzt die Informationsstelle, dass europäische Filme in den USA im Jahr 2019 EUR 295 Mio. einspielten, was 25 % der gesamten Bruttoeinspielergebnisse exportierter Filme entspricht; mit einigem Abstand folgen Deutschland (EUR 105 Mio., 9 %), China (EUR 98 Mio., 8 %), Frankreich (EUR 79 Mio., 7 %) und Italien (EUR 58 Mio., 5 %).

Abbildung 3: Besucherzahlen exportierter europäischer Filme nach Markt und Herkunft (2019)

Geschätzt. Wie in LUMIIERE hinterlegt.



Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE, Comscore

Dominanz britischer und französischer Filme bei europäischen Filmexporten 2019

Eine Differenzierung der europäischen Filmexporte nach Herkunftsland zeigt, dass britische und französische Filme beim Export in nicht-nationale Märkte führend sind: 2019 stammten 37 % der Exporte aus diesen beiden Ländern, und auf sie entfielen 62 % sämtlicher Besucher europäischer Exportfilme. Außerhalb Europas stellten britische und französische Filme zusammen über die Hälfte (53 %) des europäischen Filmangebots, und sie erreichten 64 % sämtlicher Besucher europäischer Filme.

Der Löwenanteil entfiel auf britische Filme, die allein auf 44 % der gesamten weltweiten Besucherzahlen exportierter europäischer Filme kamen, obwohl sie nur 13 % der 2019 im Kino verwerteten europäischen Filmexporte ausmachten. Im Gegensatz dazu schnitten französische Exportfilme (24 % der im Kino verwerteten Exportfilme) relativ schlecht ab und erreichten lediglich 18 % der nicht-nationalen Besucher europäischer Filme.

Eine Dominanz britischer Filme zeigt sich auch mit Blick auf die nicht-nationalen Besucherzahlen der zwanzig erfolgreichsten europäischen Filme: In der Top 10 der europäischen Exportfilme waren 2019 sechs britische Filme - und in der Top 20 waren es neun.

Etwa drei von vier exportierten europäischen Filmen wurden nur in einem oder zwei nicht-nationalen Märkten verwertet; und für neun von zehn Filmen wurden an nicht-nationalen Märkten weniger als 50 000 Tickets verkauft.

Über die Hälfte (56 %) der 3 954 im Kino verwerteten europäischen Exportfilme wurde 2019 in nur einem nicht-nationalen Gebiet gezeigt (2 210 Filme). Weitere 677 Filme (17 %) wurden nur an zwei nicht-nationalen Märkten im Kino verwertet. Das heißt, dass fast drei von vier exportierten europäischen Filmen nur in einem oder zwei nicht-nationalen Märkten im Kino gezeigt wurden. Dies bedeutet implizit, dass das Portfolio europäischer Filme, die an Exportmärkten laufen, von Gebiet zu Gebiet stark variiert. Tatsächlich waren lediglich 411 europäische Filme (10 %) in sechs oder mehr nicht-nationalen Märkten im Kino zu sehen. Diese häufig exportierten Filme erreichten zusammen 78 % der Besucher exportierter europäischer Filme.

Neun von zehn europäischen Exportfilmen (92 %) kamen an nicht-nationalen Märkten auf weniger als 50 000 Kinobesucher, und 61 % erreichten nicht einmal 1 000 Besucher. 2019 wurden nur für 31 nicht-nationale europäische Filme außerhalb ihrer heimischen Märkte mindestens 1 Mio. Tickets verkauft.

***Downtown Abbey* (GB / US) war der erfolgreichste europäische Exportfilm, für den 2019 insgesamt 17,2 Mio. Tickets an nicht-nationalen Märkten verkauft wurden.**

Für insgesamt fünf europäische Blockbuster konnten weltweit über 5 Mio. Tickets an nicht-nationalen Märkten verkauft werden. Angeführt wurde die Liste von dem britischen Historiendrama *Downtown Abbey*, das an 11 nicht-nationalen Märkten lief und für das 17,2 Mio. Tickets verkauft wurden (das entspricht 10 % sämtlicher Besucher europäischer Exportfilme). Die britische Komödie *Yesterday* (GB / US / RU / JP) belegte mit 15,5 Mio. nicht-nationalen Besuchern den zweiten Platz, gefolgt von *Cold Pursuit* (GB / US / FR / CN / NO / CA) *[dt.: Hard Powder]* (8,7 Mio.), *The Favourite* (GB INC / US / IE) *[dt.: The Favourite - Intrigen und Irrsinn]* (6,8 Mio.) und *The Queen's Corgi* (BE / US) *[dt.: Royal Corgi - Der Liebling der Queen]* (6,3 Mio.).

Kumulativ betrachtet entfielen auf die Top 10 der europäischen Exportfilme 42 % aller nicht-nationalen Besucher sämtlicher Märkte der Datenprobe; bei der Top 50 waren es 71 % und bei der Top 100 waren es 81 %.

1. INTRODUCTION & METHODOLOGY

1.1. Introduction

About this report

This report aims to outline a high-level analysis of the theatrical markets for European films in non-national markets based on admissions data provided by national data providers and by Comscore. The sample comprises European and non-European markets (including the North American market, four Latin American markets, five Asian markets, and Australia and New Zealand). The analysis focuses on 2019 data but is complemented by five-year data series for the period 2015 to 2019 for all major indicators.

The report focuses on providing a big-picture overview of the circulation of European films 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 particularly important to note that 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 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 important is non-national exploitation, for European films? How many European films are theatrically released outside their home markets? How many admissions and how much GBO do they generate in these territories?
- What is their market share in the respective non-national markets?
- What are the most important non-national theatrical markets for European films?
- For which European countries is export particularly important?
- Which European films performed particularly well in non-national markets?

About the European Audiovisual Observatory www.obs.coe.int

The European Audiovisual Observatory (hereafter Observatory) is a European public service body comprising 41 member states plus the European Union as an individual member, 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, that is to say 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 is distributed in the form of:

- print or electronic publications, including a statistical yearbook, as well as newsletters and thematic reports for the Observatory's website;
- free databases on film admissions (LUMIERE), the availability of film and TV content on VOD services (LUMIERE VOD), TV & on-demand services (MAVISE), AV law information (IRIS Merlin);
- contributions to conferences.

1.2. Data scope & sources

Data scope

In principle the data-set covers title-by-title admissions data for all feature films on release, in other words 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 (for example ballet, opera etc.) and short film compilations are not taken into account.

This report covers 2019 admissions data for 14 non-European markets, and situates them in the context of admissions data for another 34 European markets covered in the LUMIERE database:

Market region	Countries covered in 2019
North America	Canada (CA), USA (US)
Latin America	Argentina (AR), Brasil (BR), Chile (CL), Colombia (CO), Mexico (MX)
Oceania	Australia (AU), New Zealand (NZ)
Asia	China (CN), Hong Kong (HK), Japan (JP), South Korea (KR), Singapore (SG)
Europe (covered at least partially)	Austria (AT), Belgium (BE), Bulgaria (BG), Bosnia-Herzegovina (BA), Croatia (HR), Cyprus (CY), Czech Republic (CZ), Denmark (DK), Estonia (EE), Finland (FI), France (FR), Germany (DE), Greece (GR), Hungary (HU), Iceland (IS), Italy (IT), Latvia (LV), Lithuania (LT), Luxembourg (LU), Montenegro (ME), Netherlands (NL), North Macedonia (MK), Norway (NO), Poland (PL), Portugal (PT), Romania (RO), Russian Federation (RU), Slovak Republic (SK), Slovenia (SI), Spain (ES), Sweden (SE), Switzerland (CH), Turkey (TR), UK & Ireland – treated as one market (GB).

Please note that there are differences in the coverage rate of individual markets which can distort the direct comparability of statistical indicators between years or countries. This is particularly true with regard to the number of films on release: in many European countries, LUMIERE appears to cover a higher number of smaller and repertoire films with very few admissions than Comscore outside Europe. The number of films on release in Europe is hence portrayed as significantly higher than the number 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 the fact that the data-sets for non-European markets are more limited. Also note that Comscore data for the US and Canadian markets appear to not fully cover admissions to French-language films, for example in Québec. Thus, all data in this report drawn from LUMIERE should be interpreted as estimated minimum figures.

Data sources

Admissions data for 2019 for the 14 non-European markets covered in this report were provided by Comscore, and were purchased by the European Audiovisual Observatory on behalf of a buying group consisting of several European Film Agencies Research Network (EFARN) members. All European admissions data come from the European Audiovisual Observatory's LUMIERE database, which collates annual admissions from a wide variety of sources.

comSCORE www.Comscore.com	**Comscore** Comscore is a global cross-platform measurement company that measures audiences, brands and consumer behaviour across all screens. It completed its merger with Rentrak Corporation in January 2016. The company now offers its clients proprietary digital, TV and movie intelligence with vast demographic details to quantify consumers' multiscreen behaviour at massive scale.
LUMIERE www.lumiere.obs.coe.int	**LUMIERE database on film admissions** The Observatory's LUMIERE database is a free database which has been tracking 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.
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.

1.3. Methodology 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 various business models through which theatrical films can be commercially exploited on the one hand, and the lack of transparency 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. Complications arise, however, 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 for example estimate corresponding retail equivalent values – as the British Film Institute, for instance, does.

However, it is the lack of transparency 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 / Blu-ray retail and rental) and TV markets, they are generally not made available to the general public and are sold at prohibitive prices – which makes tracking them practically impossible for an organisation like the Observatory. The situation is even worse in VOD markets where, for the most part, the lack of transparency with regard to consumer expenditures remains almost complete.

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 gross box office (GBO), which is estimated by multiplying admissions with annual average ticket prices – converted to € – within each territory covered in this report.

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

Broadly speaking, differences in the data 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 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 seeking to analyse the export of films originating in 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 spans all feature fiction, documentary or animation films on theatrical release, that is to say 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, concert recordings and short film compilations were not considered for the purposes of this analysis.

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 cinemas. 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 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 European and non-European market 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 appears to cover a higher number of smaller and repertoire films with very few admissions than the number of such films covered by Comscore data outside Europe. The number of films on release is thus 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 which degree these are structural differences and to which degree this is simply caused by the fact that data-sets for non-European markets are more limited.

What is a "first release"?

A "first release" is defined as a film which is 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 in a 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 may be counted as commercial first releases. All data should therefore be considered estimates. On the other hand, there is an inherent methodological issue in defining a first release on a multi-territory basis. In this report, the definition of first release is applied to three main market regions (worldwide, Europe, outside Europe), with each region treated as a single market. In addition, since this study focuses on film exports, the first-release definition refers to non-national releases only, that is to say releases outside the home market of a film. The following definition of first release has been applied to non-national markets:

- A first release in a given region refers to films first released in at least one non-national market in that region in a specific year and never released in the same region before. The region is thus treated as if it were a single market.

This definition can be best illustrated by the example of a French film released for the first time in Spain in 2013, in the US in 2014 and in China in 2015. In the context of this report, the above-mentioned film is considered as follows, depending on the region of release:

- Worldwide: as a first release in 2013, and as an other release in 2014 and 2015.
- Europe: as a first release in 2013.
- Outside Europe: as a first release in 2014 and as an other release in 2015.

What are "admissions"?

Admissions refers 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, namely produced and majority-financed by a European country. In the context of this report, all member states of the Council of Europe are considered 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 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 this report, they are therefore generally considered 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 for this reason result in significant differences compared to publications on film exports by national sources such as the British Film Institute.

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) and Belarus.

Europe as a market refers to the entirety of the European markets for which at least partial admissions data are available in the Observatory's LUMIERE database (see appendix). This figure ranges between 29 and 34 European markets in any of the years between 2015 and 2019.

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 one 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. So there may 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 at lumiere@obs.coe.int.

As mentioned above, EUR INC films are by default not considered European films in the context of this report. A full list of EUR INC films is however provided in the appendix for the benefit of those readers who would like to include them in the analysis.

How is the country of origin of a film determined?

I To calculate market share by country of origin without double-counting films, each film 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 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. For example, a FR/DE co-production is considered a 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 consequently so may 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 from two or more countries. The country providing the majority of the financing, in other words the majority co-production country, is considered the country of origin. In the case of a parity co-production, for example Germany 40% / France 40% / Spain 20%, the nationality of the director and in a subsidiary sense the cultural content of the film determine the country to which 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. For example, AT / DE stands for an Austrian-majority and German-minority co-production.

This definition of co-production is not identical with the qualification as an official co-production (based on satisfaction of 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 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 by default applies the countries of origin as indicated on IMDb. These data are consequently checked and adjusted with 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 correct identification 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, that is to day the 100% national or majority co-producing country. All other markets – including other (minority) co-producing countries – are considered non-national markets. For example, Spain is considered the national market for *Planet 51*, an ES/GB co-production, while the release in the United Kingdom is counted as a non-national release. Non-national admissions are consequently admissions generated outside the national home market.

What does "worldwide" refer to?

In the context of this report the term "worldwide" refers to the entirety of the 29 to 34 European and 15 non-European markets which are at least partially covered in this study sample (14 markets in 2019).

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 15 non-European markets covered in this report (14 markets in 2019).

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. If not pointed out otherwise, the term average refers to the mean value.

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 impact interpretation of the data. The coverage rates of each market for the years 2015 to 2019 are shown in the appendix.

Of course, the number of films covered has a direct impact on the number of films tracked as on release. However, it has hardly any impact on the other indicators, namely admissions and GBO. Nevertheless, all data should be considered minimum estimates.

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 film data matched in LUMIERE?

The title-by-title admissions lists provided by national sources and Comscore were imported into the LUMIERE database via a process of title matching. In cases where admissions figures were not provided, they were estimated by dividing the GBO result by the average annual ticket price of the market in question.

By integrating admissions for individual territories into LUMIERE, the Observatory was able to calculate market shares for European films. Of particular importance here is the allocation of a country of origin to an individual film (see above).

2. THE BIG PICTURE 2019

2.1. Theatrical market volume of European films

Total film market volume obscure, due to lack of market transparency

It is practically impossible to quantify the total market volume for theatrical films throughout their value chain. As explained in the methodological remarks, this is partly due to methodological challenges linked to the variety of business models through which theatrical films can be commercially exploited across the different windows. But methodological difficulties aside, it is primarily the lack of transparency of certain market segments which makes it impossible to quantify corresponding consumer expenditures.

The theatrical cinema market is practically the only exploitation window for which reliable consumption / consumer-expenditure data are available. In most countries, data for the physical video, transactional VOD, television and subscription VOD markets are either not available at all or are sold at prohibitive prices which makes tracking them virtually impossible for an organisation like the Observatory. As a consequence, this report can only analyse the theatrical exploitation of European films. It is, however, important to keep in mind that the theatrical exploitation window is only one of broadly speaking four main market segments, all of which may provide relevant, – though not quantifiable in the research context of this report – market potential for European films outside Europe.

Theatrical market volume of European films worldwide in 2019

Theatrical market volume can be measured in terms of film offerings, that is to say the number of films on release, as well as admissions and GBO. Based on the title-by-title admissions data provided to the Observatory by Comscore as well as national data providers, a total of 7 821 European films were identified as being on release, in other words tracked as having sold at least one ticket for a theatrical screening in at least one of the markets covered. This was the highest figure for European films tracked as on release (see Table 2).

European films cumulatively generated about 444 million admissions, or ticket sales, in the 48 worldwide sample markets in 2019 – 11 billion below the five-year average of 455 million admissions. Applying annual average ticket prices, the Observatory estimates that European films earned about EUR 2.8 billion in gross GBO, roughly in line with the average value for the time period 2014 to 2019 (see Table 3).

Number of European film exports increases but export admissions decline in 2019

Practically all European films tracked as on release in 2019 were on release in at least one of the European markets (98%), while 51% of European films (3 954 films) were identified as on theatrical release in at least one non-national market. This was the highest tracked number of film exports in the past five years (see Table 1).

Almost all of these export films received a release in a non-national market within Europe, while only 9% (730 films) were on release in at least one of the 14 non-European territories covered. This was slightly above the five-year average.

On a cumulative level, European films generated 59% of their total admissions in their respective national markets, while the share of exports (non-national admissions) increased slightly, from an estimated 39% in 2018 to 41% in 2019. Admissions generated in national home markets fell to 264 million tickets sold, down 23 million from the 2018 record high of 287 million. In turn, admissions generated in non-national markets remained comparatively stable in 2019, at 180 million (1 million fewer than in 2018).

Breaking non-national admissions down further, the data show that about 86 million tickets were sold in non-national European markets (marking a five-year low), while 94 million tickets were sold in the 14 non-European markets covered. The comparatively strong performance of European films outside Europe can be attributed to the growth in admissions generated in the North American market, driven by the strong performance of the top two European blockbusters which together sold more than 18 million admissions in the region in 2019.

Figure 4 provides a big-picture overview of the volume and breakdown of worldwide market volume for European films in 2019. As mentioned above, the term worldwide refers to cumulative data for the 34 European and 14 non-European markets covered in this report[1]. Given this partial coverage, data should be interpreted as minimum values.

Export admissions outside Europe increase slightly in 2019

As shown in Table 3, in 2019 79% of worldwide admissions to European films were generated in European markets, while ticket sales outside Europe accounted for 21%. This was well in line with the average share of admissions to film exports outside Europe in the past five years. In terms of GBO, the European markets accounted for an estimated 79% of worldwide GBO in 2019, with European films estimated to have generated 21% of their GBO takings outside Europe – the second-highest level in the 2015-2019 period.

From a cumulative perspective, theatrical exploitation outside Europe continued to contribute a significant share of the overall theatrical market volume of European films: In 2019 more than half of non-national admissions (52%) to European films were generated outside Europe, compared to 48% in 2018.

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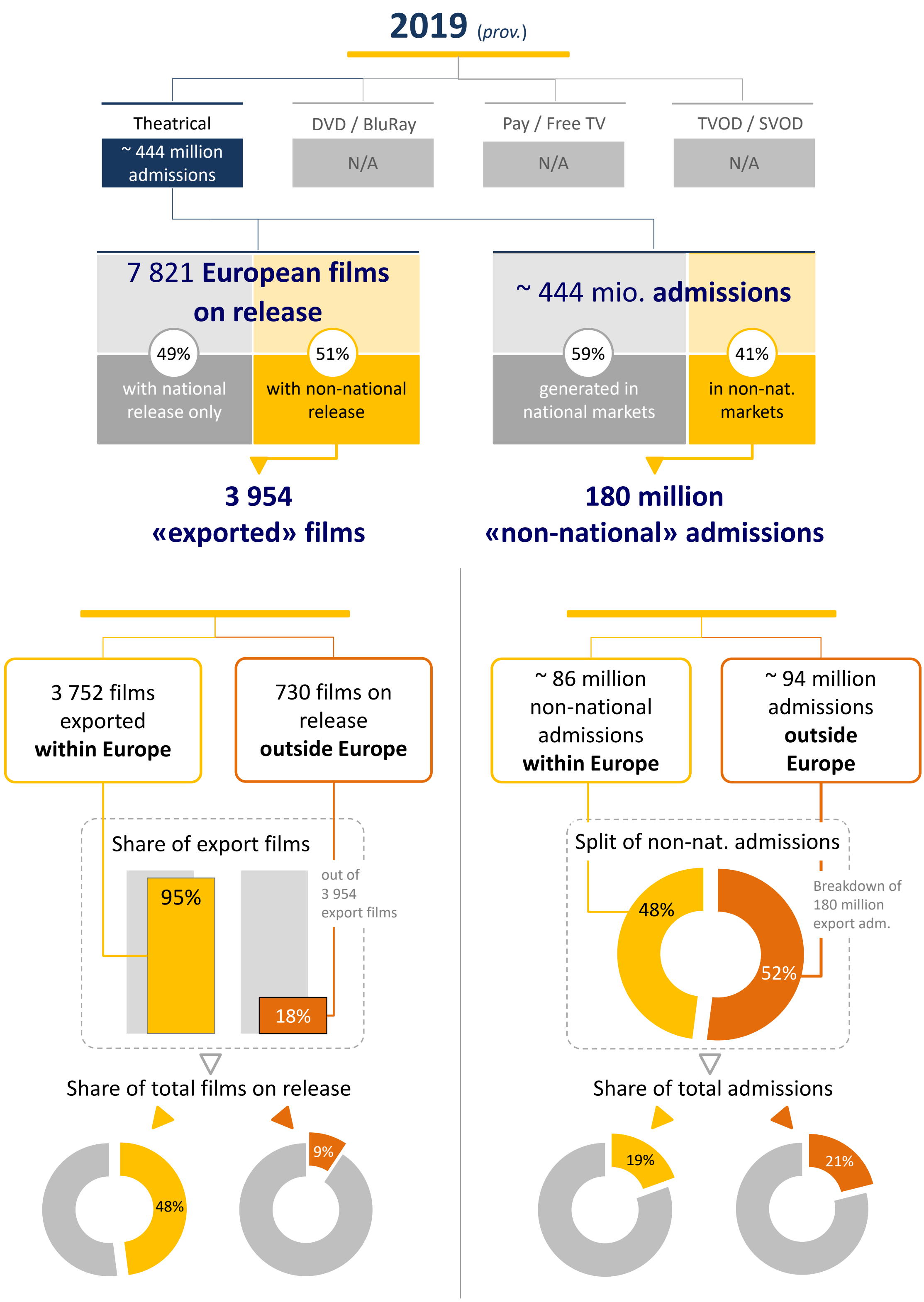
1 See Introduction for details on data sources and data scope.

Figure 4. At a glance: Worldwide theatrical market volume of European films (2019)

Provisional estimates



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 1. National vs. non-national market volume of European films (2015-2019)

As tracked in LUMIERE with the exception of estimated admissions for HK, JP and SG for the years 2015-2016

European films on release	2015	2016	2017	2018	2019 *prov.*	5y avg.
Worldwide	**6 297**	**6 719**	**6 928**	**7 598**	**7 821**	***7 073***
In national market	4 195	4 450	4 623	5 123	5 209	*4 720*
In non-national market	3 236	3 532	3 605	3 875	3 954	*3 640*
% share national	*67%*	*66%*	*67%*	*67%*	*67%*	*67%*
% share export films	*51%*	*53%*	*52%*	*51%*	*51%*	*52%*
- Non-nat. in Europe	3 089	3 337	3 403	3 711	3 752	3 458
- Non-nat. outside Europe	599	650	671	696	730	670
% share export within Europe	*49%*	*50%*	*49%*	*49%*	*48%*	*49%*
% share outside Europe	*10%*	*10%*	*10%*	*9%*	*9%*	*9%*

Admisssions to European films (in m.)	2015	2016	2017	2018	2019 *prov.*	5y avg.
Worldwide	**453**	**430**	**478**	**468**	**444**	**454**
In national market	247	258	280	287	264	267
In non-national market	206	172	199	181	180	187
% share national	55%	60%	58%	61%	59%	59%
% share export films	45%	40%	42%	39%	41%	41%
- Non-nat. in Europe	94	87	96	94	86	91
- Non-nat. outside Europe	112	85	103	87	94	96
% share export within Europe	21%	20%	20%	20%	19%	20%
% share outside Europe	25%	20%	21%	19%	21%	21%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 2. Number of European films on release worldwide (2015-2019)

As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015-2016)

European films on release	2015	2016	2017	2018	2019 *prov.*	5y avg.
Worldwide	**6 297**	**6 719**	**6 928**	**7 598**	**7 821**	**7 073**
- In Europe	6 190	6 583	6 793	7 498	7 662	6 945
- Outside Europe	599	650	671	696	730	670
% share in Europe	*98%*	*98%*	*98%*	*99%*	*98%*	*98%*
% share outside Europe	*10%*	*10%*	*10%*	*9%*	*9%*	*9%*

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 3. Admissions and GBO to European films worldwide (2015-2019)

As tracked in LUMIERE with the exception of estimated admissions for HK, JP and SG for the years 2015 and 2016; GBO estimated based on average ticket prices and converted to Euros at average annual exchange rates

Admissions to European films (in m.)	2015	2016	2017	2018	2019 *prov.*	5y avg.
Worldwide	**453**	**430**	**478**	**468**	**444**	**454**
- In Europe	342	344	376	381	350	359
- Outside Europe	112	85	103	87	94	96
% share in Europe	*75%*	*80%*	*79%*	*81%*	*79%*	*79%*
% share outside Europe	*25%*	*20%*	*21%*	*19%*	*21%*	*21%*

GBO to European films (in m. €)	2015	2016	2017	2018	2019 *prov.*	5y avg.
Worldwide	2 822	2 658	2 820	2 714	2 756	2 754
- In Europe	2 182	2 151	2 261	2 215	2 166	2 195
- Outside Europe	639	507	559	498	589	558
% share in Europe	77%	81%	80%	82%	79%	80%
% share outside Europe	23%	19%	20%	18%	21%	20%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

3. MARKET VOLUME IN NON-NATIONAL MARKETS IN 2019

3.1. European film releases in non-national markets

3 954 European films on release in non-national markets in 2019

The “film-on-release” indicator counts any film that has at least one commercial theatrical screening (i.e. generated at least one cinema ticket sale) in any sample market tracked[2]. This represents the widest possible definition of a film release. This indicator definition also underlies the quantification of admissions and GBO, which are measured for all films on release.

The number of European films on theatrical release has been growing consistently since 2012 and reached a temporary record high in 2019, with 7 821[3] films tracked as on release worldwide (i.e. on theatrical release in at least one of the 48 countries covered in this study). This includes first releases as well as holdovers, re-releases and festival or other screenings in commercial cinemas.

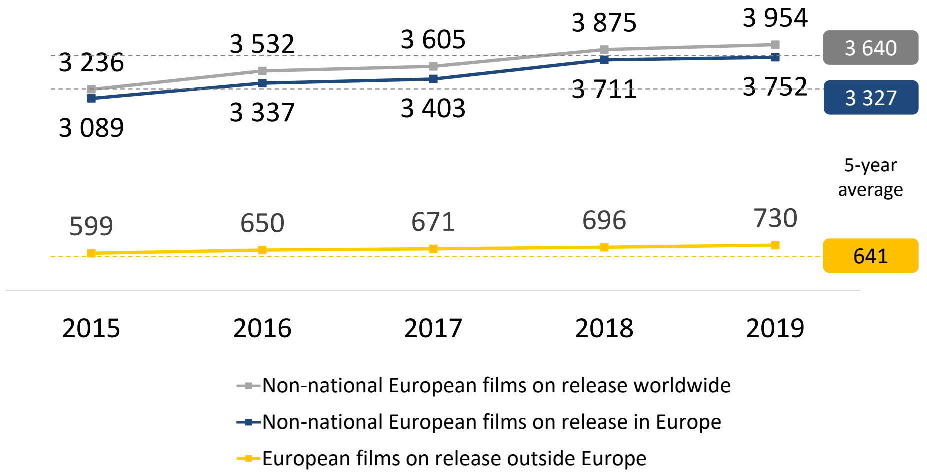
Out of these 7 821 European films, 51% (3 954 films) received a theatrical release in at least one non-national market worldwide in 2019, whether in Europe or outside Europe. Among these European film exports, 3 752 films were on theatrical release in at least one non-national market in Europe, representing 48% of all European films on release. A total of 730 European films were tracked as on release in at least one non-European market, accounting for 9% of all European films on theatrical release. In other words, almost half the European films tracked as on release in 2019 were released in at least one non-national market in Europe, while roughly one in 10 was screened in a cinema outside Europe.

[2] Important note: Given the methodological difficulties linked to classifying films by release type (first release, holdover, re-release, etc.), the number of films on release provides a methodologically consistent figure which allows comparison over time. It should, however, be noted that the number of films on release is directly linked to the coverage rate achieved data providers 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. Details on the coverage rates for all markets and years are provided in the appendix.

[3] Figures for 2019 are based on LUMIERE data as of 1 December 2020. Additional admissions data, particularly from declarations to the MEDIA Programme, must still be imported into LUMIERE once they become available. The number of films on release is consequently expected to increase as a result of supplementary data imports.

Figure 5. Number of non-national European films on release (2015-2019)

As tracked in LUMIERE

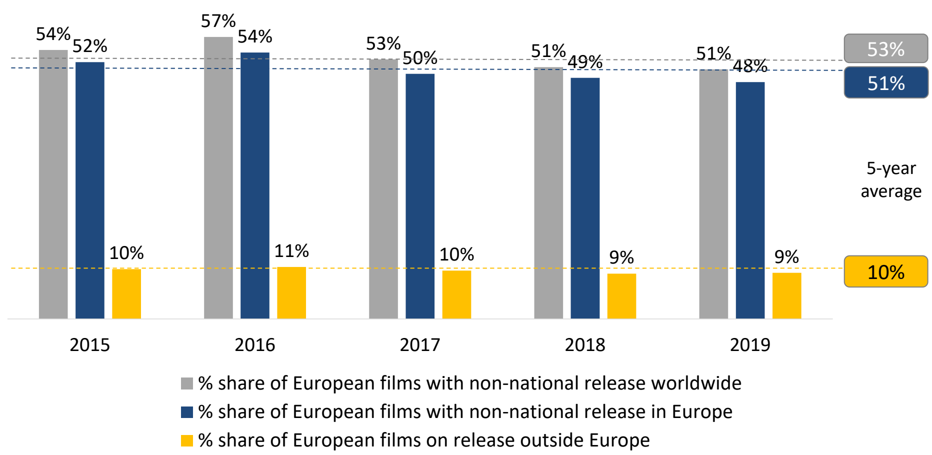


Note: Limited or no data were available for certain markets (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG and VE) and years (i.e. data did not include European films exclusively released in HK, JP or SG for the years 2015 and 2016 and in VE for 2019). These constraints do not limit the comparability of the number of films on release over the past five years, due to the low number of European films exclusively on release in these markets and nowhere else.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Figure 6. Share of non-national European films out of total number of European films (2015-2019)

As tracked in LUMIERE



Note: Limited or no data were available for certain markets (BA, CY, GE, HK, JP, LU, ME, MK, SE, SG and VE) and years (i.e. the data did not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019). These constraints do not limit the comparability of the share of films on release over the past five years, due to the low number of European films exclusively on release in these markets and nowhere else.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

The number of European films on theatrical release in non-national markets between 2015 and 2019 is shown in further detail in Table 5. Looking at the entire five-year period from 2015 to 2019, the cumulative number of European films on release grew both in and outside Europe, with significant variations across markets.

In Europe, the highest number of non-national European films on release was registered in Switzerland (964), followed by Germany (887) and Spain (560). The comparatively low number of European non-national films on release in France (204 films) is probably linked to the limited number of French-market[4] films covered in Lumiere.

Outside Europe, the number of non-national European films on release in 2019 decreased in North America and Latin America, while increasing in Australia, New Zealand, China and South Korea. Australia was the non-European market featuring the highest number of European films on release in 2019 (207 titles), followed by the US and Mexico (162).

Table 4. Number of European film exports worldwide (2015-2019)

As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019)

Markets	2015	2016	2017	2018	2019	*5y avg.*
Worldwide	3 236	3 532	3 605	3 875	3 954	3 640
In Europe	3 089	3 337	3 403	3 711	3 752	3458
Outside Europe	599	650	671	696	730	669
US & CA	210	193	223	222	185	207
Latin America	376	418	374	376	342	377
AU & NZ	127	140	178	216	239	180
Asia	128	126	148	213	228	169

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 5. Number of European film exports in Europe (2015-2019)

As tracked in LUMIERE. Ranking based on 2019 figures

Rank	European markets	2015	2016	2017	2018	2019	*5y avg.*
1	CH	795	885	974	993	964	922
2	DE	822	816	848	877	887	850
3	ES	169	220	625	619	560	439
4	NL	186	234	463	527	552	392
5	IT	316	384	478	534	540	450
6	CZ	357	411	411	421	493	419

[4] Between 804 and 857 films were tracked as on release every year in France from 2015 to 2019, according to LUMIERE; the CNC regularly tracks more than 7 000 films as being on release every year. While these films captured between 87% and 97% of all admissions generated in the French market during this time-frame, they do not reflect the entirety of films on release, leaving out a potentially high number of European films.

Rank	European markets	2015	2016	2017	2018	2019	5y avg.
7	NO	159	176	213	304	488	268
8	PT	474	347	412	458	446	427
9	BE	1	440	493	510	443	377
10	SK	328	20	374	430	385	307
11	MK*	-	-	-	149	324	237
12	LU*	-	-	264	270	288	274
13	HU	259	289	289	312	287	287
14	RU	160	173	205	373	273	237
15	AT	211	227	237	258	259	238
16	SI	248	235	257	264	255	252
17	SE*	316	318	1	-	247	221
18	FR	217	180	166	207	204	195
19	GB	506	546	533	539	186	462
20	TR	136	139	133	180	180	154
21	LT	110	109	136	157	176	138
22	FI	95	96	115	131	153	118
23	GR	122	124	147	169	149	142
24	EE	164	182	168	180	143	167
25	RO	138	143	125	150	142	140
26	PL	207	198	238	285	131	212
27	ME*	-	51	4	115	129	75
28	LV	68	117	115	146	124	114
29	BG	134	145	151	139	114	137
30	BA*	-	85	96	100	102	96
31	DK	82	94	104	97	83	92
32	IS	55	44	47	60	70	55
33	HR	79	56	54	80	54	65
34	CY*	-	25	27	28	28	27
35	GE*	-	29	-	-	-	29

*Limited or no data were available for certain markets (BA, CY, GE, LU, ME, MK and SE) and years (i.e. the data did not include European films exclusively released in BA, CY or GE in 2015).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 6. Number of European film exports outside Europe (2015-2019)

Ranking based on 2019 figures

Rank	Non-European markets	2015	2016	1017	2018	2019	5y avg.
1	AU	120	120	155	198	207	160
2	US	174	174	202	193	162	181
3	MX	160	161	134	174	162	158
4	BR	194	195	183	156	152	176
5	KR	97	97	114	117	129	111
6	CO	124	125	105	128	118	120
7	NZ	74	74	83	94	110	87
8	CA	88	88	91	122	105	99
9	AR	117	117	108	120	97	112
10	CN	34	37	49	44	62	45
11	CL	58	58	48	74	57	59
12	SG*	-	-	39	48	42	43
13	HK*	-	-	32	39	38	36
14	JP*	-	-	42	44	36	41
15	VE*	5	36	19	15	-	19

*Limited or no data were available for certain markets (HK, JP, SG and VE) and years (i.e. the data did not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Number of European first releases outside Europe increased in 2019

The first releases indicator only counts films that receive proper commercial release for the first time in a specific territory or region[5]. This represents the narrowest possible definition of a film release. Even though reflecting a comparatively small share of films on release, first releases generally account for the vast majority of admissions.

By analysing both films on release and first releases, one can define the maximum and minimum values of the bandwidth within which one can reasonably quantify the number of film releases. Depending on the question to be addressed, readers can pick the most appropriate indicator out of these two or estimate a reasonable value within the bandwidth.

In this analysis, each of the three market regions (worldwide, Europe, outside Europe) are considered as a single market. In other words, a European film is considered a first release for a certain year in a given region only if it has not been previously released in any markets of the same region.

In addition, since this study focuses on film exports, the definition of first release refers to non-national releases only, that is to say releases outside the home market of a film.

This definition of first release can be best illustrated by the example of a French film released for the first time in Spain in 2013, in the US in 2014 and in China in 2015. In the context of this report, the above-mentioned film is considered as follows, depending on the region of release:

- Worldwide: as a first release in 2013, and as an other release in 2014 and 2015.
- Europe: as a first release in 2013.
- Outside Europe: as a first release in 2014, and as an other release in 2015.

Among all European films on release in 2019 in non-national markets worldwide, an estimated 28% (corresponding to 1 096 films) were first releases. This means that 28% of these films had never been screened before 2019 in any non-national markets in the sample.

In Europe, 31% (1 167 films) of European film exports on release in 2019 were estimated to be first releases, the same share as in the previous year.

Outside Europe, an estimated 376 European films premiered in cinemas in 2019. In other words, 52% of the European films on release outside Europe had never been released in cinemas before 2019 in any of the 14 non-European markets covered in this report.

[5] Important note: 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. A first release in a given region refers to films first released in at least one non-national market in that region in a specific year and never released in the same region before. Each of the regions (worldwide, Europe, outside Europe) is thus treated as if it were a single market. This definition of first releases here only applies to non-national releases, that is to say releases outside the home market of a film.

Table 7. European first releases* in non-national markets (2015-2019)

Estimated. As tracked in LUMIERE

Worldwide	2015	2016	2017	2018	2019	5y avg.
Films on release	**3 236**	**3 532**	**3 605**	**3 875**	**3 954**	**3 236**
First releases	823	1 104	978	1 080	1 096	823
Other	2 413	2 233	2 627	2 795	2 858	2 413
% share first releases	25%	31%	27%	28%	28%	25%
% share other	75%	63%	73%	72%	72%	75%
In Europe	**2015**	**2016**	**2017**	**2018**	**2019**	**5y avg.**
Films on release	**3 089**	**3 337**	**3 403**	**3 711**	**3 752**	**3 458**
First releases	900	1 104	996	1 144	1 167	1 062
Other	2 189	2 233	2 407	2 567	2 585	2 396
% share first releases	29%	33%	29%	31%	31%	31%
% share other	71%	67%	71%	69%	69%	69%
Outside Europe	**2015**	**2016**	**2017**	**2018**	**2019**	**5y avg.**
Films on release	**599**	**650**	**671**	**696**	**730**	**669**
First releases	288	365	381	384	376	359
Other	311	285	290	312	354	310
% share first releases	48%	56%	57%	55%	52%	54%
% share other	52%	44%	43%	45%	48%	46%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

*In this report, first releases in a given region (worldwide, Europe, outside Europe) refers to films first released in at least one non-national market in that region in a specific year and never released in the same region before. The region is thus treated as if it were a single market.

Non-national European films accounted for 34% of the film offering in Europe and 18% outside Europe, in 2019

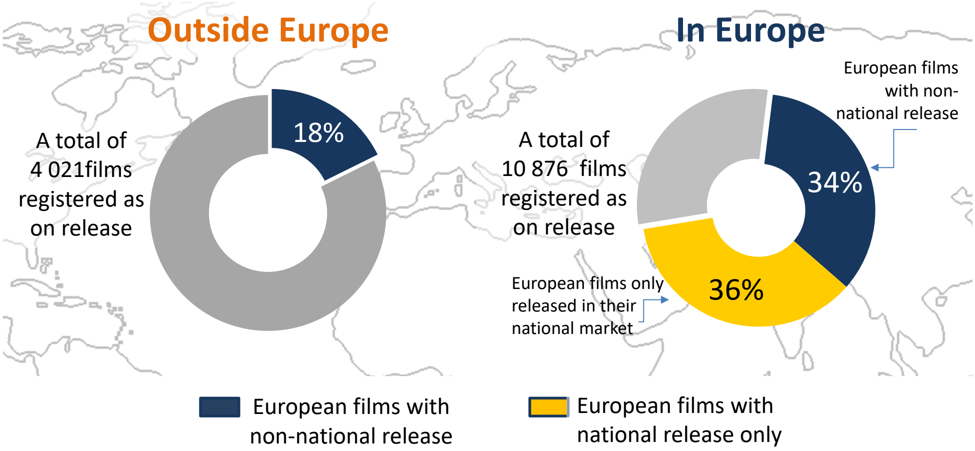
In 2019, European films accounted for 70% of the 10 876 films identified as screened at least once in one of the 34 European markets covered in this report. Out of these films, 3 752 were screened in at least one non-national market in Europe, representing 34% of all films on release in Europe. When measured in terms of first releases, European titles accounted for 53% of the estimated 2 191 non-national films theatrically released in Europe for the first time in 2019.

Outside Europe, European films accounted for 18% of the 4 021 films identified as having been screened at least once in the 14 non-European markets in 2019. In other words, almost one out of five films on theatrical release outside Europe was of European origin. European films represented 15% of the 2 447 non-national films estimated to have been released for the first time outside Europe in 2019.

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 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.

Figure 7. Market share of European film exports in terms of films on release (2019)

Provisional estimates



Important note: As mentioned in the methodological remarks in the introduction, the number of films on release is an indicator 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 a portion of the total number of theatrical films on offer.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

As shown in Table 8, non-national European films accounted for 30% of all films tracked as on release worldwide in 2019.

Table 8. Share of European film exports out of all films on release worldwide (2015-2019)

Estimated; As tracked in LUMIERE (does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019)

Markets	2015	2016	2017	2018	2019	5y avg.
Worldwide	31%	31%	29%	29%	30%	30%
In Europe	34%	38%	37%	37%	34%	36%
Outside Europe	20%	19%	19%	18%	18%	19%
US & CA	23%	21%	24%	24%	20%	23%
Latin America	26%	27%	25%	25%	23%	25%
AU & NZ	21%	21%	24%	21%	23%	22%
Asia	12%	10%	11%	12%	13%	11%

In Europe, the share of non-national European films tracked as on release significantly varied across the 34 markets covered. The share of European non-national films was particularly high in countries with limited film production capacity, such as North Macedonia (66%), Slovenia (55%), Austria (53%) and Luxembourg (53%). Among countries with high production capacity, Germany was the one with the higher share of non-national European films on release (36%). This compared to 32% in Spain, 29% in Italy and 19% in the United Kingdom.

In France, which is among the top 2 markets for European non-national films in terms of admissions, the relatively low share of non-national European films (24%) can be partially ascribed to the limited number of films on release in the French market covered in LUMIERE (a total of 836 films were tracked in 2019). While these films cover an estimated 92% of all French admissions, they do not represent the entirety of the titles on release, potentially leaving out a certain number of European films.

In Sweden, the lower-than-average share of non-national European films in 2017 and 2018 was due to limited data coverage in LUMIERE for these two years.

Table 9. Share of European film exports out of all films on release in Europe (2015-2019)

As tracked in LUMIERE; Ranked by 2019 figures

Rank	European markets	2015	2016	2017	2018	2019	5y avg.
1	MK*	-	-	-	54%	66%	60%
2	SI	49%	50%	54%	54%	55%	52%
3	AT	49%	50%	51%	54%	53%	51%
4	LU*	-	-	58%	55%	53%	55%
5	SK	55%	20%	52%	54%	52%	47%
6	BE	5%	50%	53%	57%	52%	43%

Rank	European markets	2015	2016	2017	2018	2019	5y avg.
7	ME*	-	32%	22%	46%	49%	37%
8	CH	48%	48%	51%	49%	47%	49%
9	LT	38%	38%	45%	45%	47%	42%
10	EE	44%	48%	47%	45%	46%	46%
11	GR	39%	39%	44%	46%	45%	43%
12	PT	46%	41%	42%	48%	44%	44%
13	NL	41%	38%	41%	43%	43%	41%
14	BA*	-	39%	41%	45%	43%	42%
15	BG	43%	44%	44%	48%	41%	44%
16	SE*	36%	37%	8%	-	41%	30%
17	NO	27%	30%	32%	38%	39%	33%
18	PL	44%	40%	48%	49%	39%	44%
19	LV	30%	39%	39%	42%	39%	38%
20	DE	34%	35%	36%	37%	36%	35%
21	CZ	31%	33%	34%	33%	36%	33%
22	HU	47%	47%	40%	43%	35%	43%
23	RU	27%	29%	31%	35%	33%	31%
24	DK	31%	33%	37%	36%	33%	34%
25	RO	34%	32%	32%	34%	33%	33%
26	IS	29%	22%	24%	31%	32%	28%
27	FI	29%	29%	32%	34%	32%	31%
28	ES	31%	32%	34%	34%	32%	32%
29	IT	26%	28%	30%	31%	29%	29%
30	TR	26%	26%	25%	28%	29%	27%
31	HR	36%	27%	26%	38%	27%	31%
32	FR	26%	21%	21%	24%	24%	23%
33	CY*	-	18%	19%	20%	21%	20%
34	GB	21%	21%	21%	21%	20%	21%
35	GE*	-	16%	-	-	-	16%

*Limited or no data were available for certain markets (BA, CY, GE, LU, ME, MK and SE) and years (i.e. the data did not include European films exclusively released in BA, CY or GE in 2015).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Outside Europe, the share of European films in the film offering tracked for 2019 was fairly comparable from region to region, amounting to 23% in Latin America, Australia & New Zealand and 20% in North America. The Asian market, represented by China, Hong Kong, Japan, South Korea and Singapore, stood out with a comparatively low share of European films (13%), particularly in China where European films accounted for only 7% of the film offerering tracked for 2019.

Table 10. Share of European film exports out of all films on release outside Europe (2015-2019)

As tracked in LUMIERE. Ranked by 2019 figures.

Rank	Non-European markets	2015	2016	1017	2018	2019	5y avg.
1	CO	33%	29%	27%	29%	29%	30%
2	BR	32%	30%	29%	27%	26%	29%
3	MX	28%	28%	24%	27%	26%	27%
4	CL	21%	23%	20%	26%	23%	23%
5	AU	21%	20%	23%	21%	22%	21%
6	KR	19%	20%	23%	21%	21%	21%
7	US	21%	21%	24%	24%	20%	22%
8	NZ	21%	18%	20%	19%	19%	19%
9	AR	23%	22%	20%	22%	18%	21%
10	CA	17%	18%	20%	22%	17%	19%
11	HK*	-	-	11%	13%	13%	12%
12	SG*	-	-	14%	14%	13%	14%
13	JP*	-	-	13%	13%	11%	12%
14	CN	5%	4%	5%	5%	7%	5%
15	VE*	2%	14%	10%	14%	-	10%

*Limited or no data were available for certain markets (HK, JP, SG and VE) and years (i.e. the data did not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

3.2. Admissions to European films in non-national markets

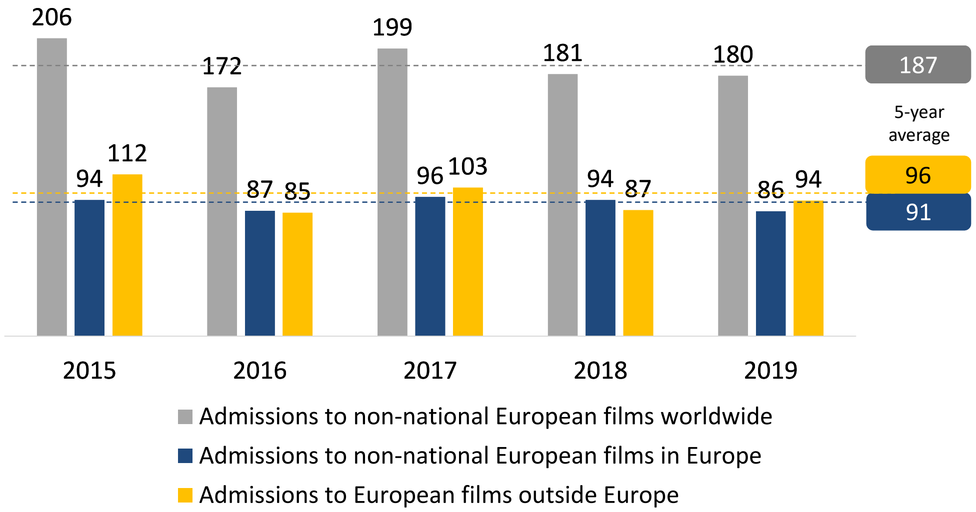
180 million tickets sold to European films in non-national markets in 2019

In 2019, European films took 180 million ticket sales in non-national markets across the world, representing 41% of all admissions to European films. A total of 86 million admissions were sold in non-national markets in Europe, down from 94 million in 2018, marking a five-year low and accounting for 19% of all admissions to European films globally.

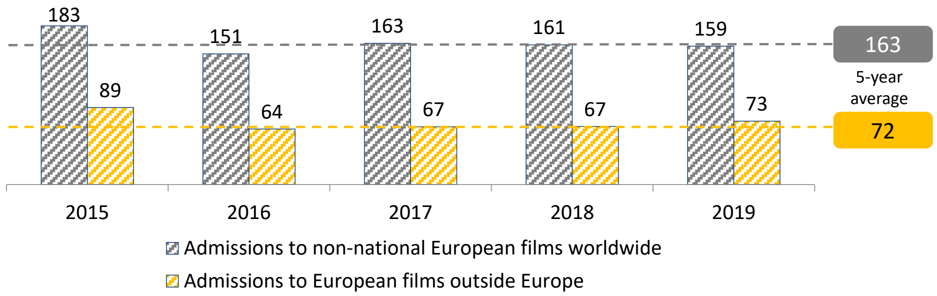
Outside Europe, European films sold a total of 94 million tickets in 2019, representing 21% of all admissions to European films worldwide and 52% of total export admissions for the year. This was seven million tickets more than in 2018 but far below the levels registered in 2015 and 2017, when a comparatively large number of European blockbusters drove admissions to European films outside Europe to higher-than-average figures (112 and 103 million, respectively). While only three or four European films usually manage to sell more than five million tickets outside Europe, in the exceptional years of 2015 and 2017 it was respectively six and five such films.

Figure 8. Admissions to non-national European films (2015-2019)

In million; As tracked in LUMIERE with the exception of estimated admissions for HK, JP and SG for 2015 and 2016



Pro-forma estimates for cumulative admissions to non-national European films, excluding China

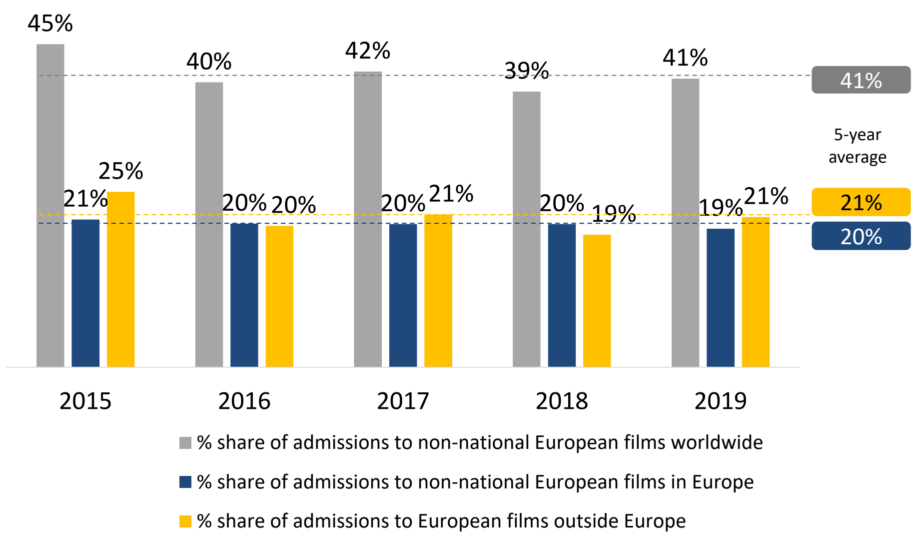


Source: European Audiovisual Observatory / LUMIERE, Comscore.

The success of European films in the Chinese market plays an even more decisive role in the development of overall admissions to European films outside Europe. As illustrated in Figure 8, when one takes out China the baseline market volume for European films between 2015 and 2019 drops from 85 to 64 million admissions. This is particularly significant in light of the fact that a very limited number of European films are granted access to the Chinese market (62 films in 2019).

Figure 9. Share of admissions to non-national European films out of total admissions to European films worldwide (2015-2019)

As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015 to 2016, and in VE for 2019)



Source: European Audiovisual Observatory / LUMIERE, Comscore.

In 2019, outside Europe, admissions to European films declined in the majority of markets, and interannual growth was clearly driven by a jump in theatrical admissions in the North American market, where European films sold 40.4 million tickets in 2019 (of which 36.1 in the US alone). Excluding the admissions generated in the US, the volume for European films outside Europe would have been the lowest in five years. Admissions to European films in 2019 declined in Latin America (20.7 million), Oceania (6.0 million) and Asia (26.5 million).

Table 11. Admissions to European film exports worldwide (2015-2019)

As tracked in LUMIERE with the exception of pro-forma estimates for Asian admissions for the years 2015 and 2016

Markets	2015	2016	2017	2018	2019	5y avg.
Worldwide	205.6	171.8	198.5	180.9	179.8	187.3
In Europe	94.0	86.6	96.0	93.9	86.2	91.4
Outside Europe	111.6	85.2	102.5	87.0	93.6	111.6
US & CA	42.1	29.8	27.1	29.3	40.4	42.1
Latin America	32.7	18.6	23.7	22.8	20.7	32.7
AU & NZ	5.1	7.4	5.7	7.3	6.0	5.1
Asia	28.2	25.8	40.5	27.6	26.5	28.2

Source: European Audiovisual Observatory / LUMIERE, Comscore.

In Europe, admissions to non-national European films decreased in quite a uniform manner across territories in 2019. Germany and France were the two largest markets for European film exports in terms of admissions, with 12.2 million and 11.6 million admissions, respectively, accounting for 7% and 6% of cumulative admissions to European non-national films in the year, respectively. In Italy, non-national European films captured 9 million admissions (5% of export ticket sales), followed by Russia (7.8 million, 4%) and Spain (7.4 million, 4%).

Table 12. Admissions to European film exports in Europe (2015-2019)

As tracked in LUMIERE; Ranking based on 2019 figures

Rank	European markets	2015	2016	2017	2018	2019	5y avg.
1	DE	13.0	11.6	13.3	11.1	12.2	12.2
2	FR	11.5	12.1	10.1	14.4	11.6	11.9
3	IT	9.8	11.3	10.1	9.9	9.0	10.0
4	RU	8.8	5.9	12.5	8.8	7.8	8.7
5	ES	7.9	7.0	8.4	7.2	7.4	7.6
6	PL	6.0	5.7	6.6	7.2	5.2	6.1
7	NL	3.6	4.5	4.3	5.3	5.2	4.6
8	AT	3.7	2.8	3.4	2.7	3.1	3.1
9	CH	3.6	3.3	3.1	2.9	2.9	3.2
10	BE	0.3	3.0	3.3	3.7	2.6	2.6
11	GB	5.5	3.8	4.4	2.0	2.1	3.5
12	TR	2.6	1.1	3.0	2.2	1.7	2.1
13	GR	1.6	1.2	1.4	1.6	1.7	1.5
14	PT	1.8	1.1	1.6	1.8	1.6	1.6
15	SE*	1.4	1.9	0.3	-	1.5	1.3

Rank	European markets	2015	2016	2017	2018	2019	5y avg.
16	CZ	1.5	1.3	1.8	1.7	1.3	1.5
17	HU	1.4	1.1	1.3	1.7	1.2	1.3
18	DK	1.0	1.7	1.5	1.2	1.2	1.3
19	NO	0.9	1.1	1.2	1.1	1.1	1.1
20	SK	0.9	0.7	1.1	1.1	1.0	1.0
21	FI	0.6	0.9	0.6	0.9	1.0	0.8
22	RO	1.1	0.7	1.3	1.2	0.8	1.0
23	EE	0.6	0.4	0.7	0.6	0.5	0.6
24	LT	0.5	0.4	0.7	0.6	0.5	0.5
25	HR	0.6	0.3	0.6	0.6	0.4	0.5
26	BG	0.5	0.3	0.4	0.5	0.3	0.4
27	SI	0.4	0.3	0.4	0.4	0.3	0.4
28	LV	0.3	0.4	0.5	0.5	0.3	0.4
29	BA*	-	0.1	0.2	0.3	0.2	0.2
30	LU*	-	-	0.3	0.2	0.2	0.2
31	IS	0.1	0.1	0.1	0.1	0.1	0.1
32	ME*	-	0.1	-	0.1	0.1	0.1
33	MK*	-		-	0.1	0.1	0.1
34	CY*	-	0.1	0.1	0.1	0.0	0.1
35	GE*	-	0.1	-	-	-	0.1

*Limited or no data were available for certain markets (BA, CY, GE, LU, ME, MK and SE) and years (i.e. the data did not include European films exclusively released in BA, CY or GE in 2015).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Outside Europe, the North American market confirmed its position as the most important export region for European films, accounting for an estimated 22% (20% in the US alone) of cumulative non-national admissions to European films. This was well ahead of Asia (15%), Latin America (12%) and Oceania (3%).

In China, admissions to European films remained comparatively stable at 20.4 million in 2019, below the five-year average of 24 million, representing 11% of cumulative export admissions to European films worldwide. This was far below the exceptional level registered in 2017, when China became for the first time the largest export market for European films in terms of admissions (35.8 million), driven by the success of *Valerian and the City of a Thousand Planets*, which sold over 11.3 million tickets in the Asian country. Conversely, in 2018 and 2019 no European blockbuster achieved a comparable success in the Chinese market (*La leggenda del pianista sull'oceano*, screened for the first time in China in 2019 in a restored version, only sold 4.5 million tickets in the country).

When considering the importance of the Chinese market for European films, one must keep in mind that China remains accessible for only an extremely limited number of European films (62 films on release in 2019) and does not (yet) offer a realistic market potential for the vast majority of European titles.

Table 13. Admissions to European film exports outside Europe (2015-2019)

As tracked in LUMIERE; Ranking based on 2019 figures

Rank	Non-European markets	2015	2016	1017	2018	2019	5y avg.
1	US	37.9	26.2	24.0	26.5	36.1	30.1
2	CN	22.7	21.2	35.8	20.0	20.4	24.0
3	MX	15.4	10.0	14.2	12.4	11.5	12.7
4	AU	4.1	5.9	4.5	5.6	4.8	5.0
5	CA	4.2	3.5	3.1	2.8	4.3	3.6
6	BR	8.1	3.7	3.9	4.3	4.1	4.8
7	CO	3.8	1.8	3.0	2.9	3.3	3.0
8	KR	5.5	4.7	4.7	3.9	3.0	4.4
9	JP*	-	-	2.3	2.1	2.0	2.1
10	NZ	1.1	1.5	1.2	1.6	1.2	1.3
11	AR	2.9	2.0	1.5	1.9	1.2	1.9
12	HK*	-	-	0.9	1.0	0.8	0.9
13	CL	1.1	0.6	0.7	0.8	0.6	0.7
14	SG*	-	-	0.3	0.7	0.3	0.4
15	VE*	1.4	0.4	0.4	0.4	-	0.6

*Limited or no data were available for certain markets (HK, JP, SG and VE) and years (i.e. the data did not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

European export flms took 2% of admissions outside Europe and 7% in Europe, in 2019

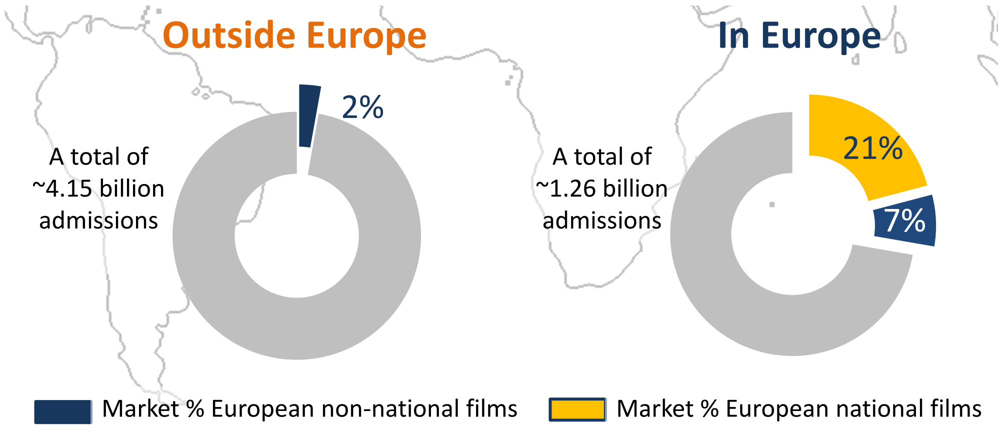
In 2019, European non-national films generated 3% of total ticket sales worldwide.

In Europe, European films generated over 380 million admissions in 2019. Of these admissions, 264 million were to national films and 86 million to European film exports. Admissions to non-national European films represented 7% of all ticket sales in Europe

In comparison, European films sold 94 million tickets outside Europe, accounting for around 2% of the cumulative 4.15 billion admissions generated by all films tracked in the non-European markets covered in this report (see Figure 10).

Figure 10. Market share of European films in terms of admissions (2019)

Estimates; As tracked in LUMIERE



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 14. Market share of European film exports in terms of admissions (2015-2019)

As tracked in LUMIERE with the exception of pro-forma estimates for Asian admissions for the years 2015 and 2016

Markets	2015	2016	2017	2018	2019	*5y avg.*
Worldwide	4%	3%	4%	3%	3%	4%
In Europe	8%	7%	8%	8%	7%	7%
Outside Europe	3%	2%	3%	2%	2%	2%
US & CA	3%	2%	2%	2%	3%	3%
Latin America	5%	3%	4%	4%	3%	4%
AU & NZ	5%	8%	6%	7%	6%	6%
Asia	2%	1%	2%	1%	1%	2%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

In Europe, the highest market shares for non-national European films in terms of admissions were in Montenegro (25%), Switzerland (24%) and Austria (23%). Conversely, European film exports recorded the lowest market shares in Russia, Turkey and the United Kingdom, where they took between 1% and 4% of admissions in 2019.

Table 15. Market share of European film exports in terms of admissions in Europe (2015-2019)

As tracked in LUMIERE

Rank	Markets	2015	2016	2017	2018	2019	5y avg.
1	ME*	-	27%	34%	31%	25%	29%
2	CH	25%	25%	23%	25%	24%	24%
3	AT	23%	19%	23%	21%	23%	22%
4	BA*	-	15%	18%	27%	19%	20%
5	GR	16%	12%	14%	17%	17%	15%
6	LU*	-	-	24%	22%	17%	21%
7	SK	19%	15%	16%	19%	16%	17%
8	EE	18%	14%	19%	16%	15%	16%
9	BE	3%	16%	18%	20%	15%	14%
10	SI	19%	15%	15%	18%	14%	16%
11	NL	12%	13%	12%	14%	13%	13%
12	LT	14%	10%	17%	14%	13%	13%
13	MK*	-	-	-	18%	11%	15%
14	LV	14%	17%	19%	18%	11%	16%
15	FI	7%	10%	7%	11%	11%	9%
16	DE	10%	9%	11%	11%	11%	10%
17	PT	12%	8%	10%	13%	10%	11%
18	NO	8%	9%	10%	9%	10%	9%
19	SE*	8%	11%	5%	-	10%	8%
20	IT	10%	11%	11%	12%	9%	10%
21	PL	14%	11%	12%	12%	9%	11%
22	DK	7%	12%	12%	9%	9%	10%
23	HR	14%	8%	14%	14%	8%	12%
24	HU	11%	8%	8%	11%	8%	9%
25	CZ	12%	8%	12%	11%	7%	10%
26	IS	11%	6%	6%	8%	7%	8%
27	ES	8%	7%	8%	7%	7%	8%
28	BG	10%	5%	8%	11%	7%	8%
29	FR	6%	6%	5%	8%	6%	6%
30	RO	10%	5%	9%	9%	6%	8%
31	CY*	-	8%	8%	10%	5%	7%

Rank	Markets	2015	2016	2017	2018	2019	5y avg.
32	RU	5%	3%	6%	4%	4%	4%
33	TR	4%	2%	4%	3%	3%	3%
34	GB	3%	2%	2%	1%	1%	2%
35	GE*	-	7%	-	-	-	7%

*Limited or no data were available for certain markets (BA, CY, GE, LU, ME, MK and SE) and years (i.e. the data did not include European films exclusively released in BA, CY or GE in 2015).

Source: European Audiovisual Observatory / LUMIERE, Comscore

As in past years, the highest market share of European films outside Europe was registered in New Zealand (8%), followed by Australia (6%), Colombia (5%) and Canada (4%). In contrast, the lowest market shares of European films were observed in South Korea, China and Japan – where European films captured only 1% of admissions, respectively.

Table 16. Market share of European film exports in terms of admissions (2015-2019)

As tracked in LUMIERE with the exception of pro-forma estimates for Asian admissions for the years 2015 and 2016

Rank	Non-European markets	2015	2016	2017	2018	2019	5y avg.
1	NZ	8%	10%	8%	10%	8%	9%
2	AU	5%	7%	6%	7%	6%	6%
3	CO	6%	3%	5%	5%	5%	5%
4	CA	4%	3%	3%	3%	4%	3%
5	HK*	-	-	4%	4%	3%	4%
6	MX	5%	3%	4%	4%	3%	4%
7	US	3%	2%	2%	2%	3%	3%
8	AR	6%	4%	3%	4%	3%	4%
9	BR	5%	2%	2%	3%	2%	3%
10	CL	4%	2%	3%	3%	2%	3%
11	SG*	-	-	2%	4%	2%	2%
12	KR	3%	2%	2%	2%	1%	2%
13	CN	2%	2%	2%	1%	1%	2%
14	JP*	-	-	1%	1%	1%	1%
15	VE*	5%	2%	2%	4%	-	3%

*Limited or no data were available for certain markets (HK, JP, SG and VE) and years (i.e. the data did not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

3.3. GBO to European export films

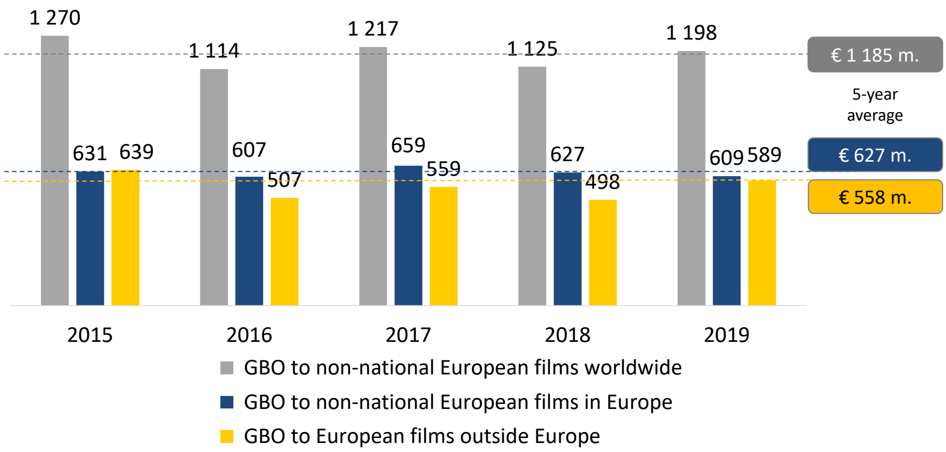
European export films generated an estimated GBO of € 1.2 billion in non-national markets in 2019

Important note:
As mentioned in the methodological remarks in chapter 2, LUMIERE covers only admissions and no gross box office (GBO) data. In order to provide a ballpark figure for GBO results 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 naturally deviate from actual GBO takings and should be considered rough estimates.

Applying average ticket prices for the individual markets, European export films generated in 2019 an estimated GBO of about € 1.2 billion in non-national markets worldwide (see Figure 11). This figure represented an increase of 7% and € 74 million compared to 2018, corresponding to an estimated 43% of total GBO earned by European films worldwide (€ 2.8 billion).

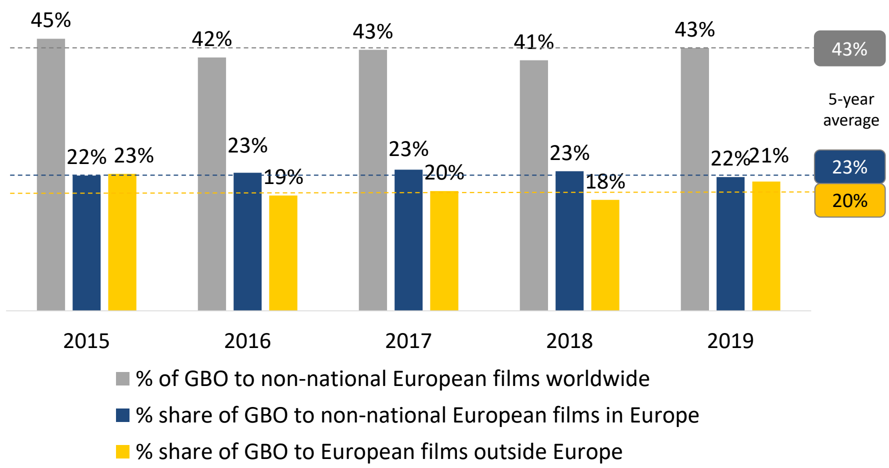
Figure 11. GBO to non-national European films (2015-2019)

Estimated cumulative GBO to non-national European films as tracked in LUMIERE; In € million



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Figure 12. Share of GBO to non-national European films out of total GBO to European films worldwide (2015-2019)



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Within Europe, European films generated an estimated total of € 609 million in non-national markets, accounting for 22% of all box office takings generated by European films worldwide. This was 3% and € 17 million less than in 2018, and represented the second-lowest level in five years.

Conversely, the GBO taken by European films outside Europe increased to € 589 million in 2019 – the second highest level in five years – corresponding to 21% of the total GBO generated by European films worldwide. Among international territories, North America – due to comparatively high ticket prices – remained by far the most important export market for European films in 2019. With an estimated € 330 million, the North American market accounted for 28% of total GBO to European films in non-national markets. The share of the five Asian samples was 12% (€ 149 million), which was below the five-year average. Latin America (EUR 58 million) and Oceania (EUR 52 million) followed at a distance, representing, respectively, 5% and 4% of the total GBO to European films in export markets.

Table 17. GBO to European film exports worldwide (2015-2019)

In € million; Estimates calculated by applying local average ticket prices to admissions as tracked in LUMIERE with the exception of estimated admissions for HK, JP, SG for the years 2015 and 2016

Markets	2015	2016	2017	2018	2019	5y avg.
Worldwide	1 270.2	1 114.0	1 217.3	1 124.9	1 198.5	1 270.2
In Europe	631.1	606.9	658.6	626.7	609.3	631.1
Outside Europe	639.1	507.1	558.7	498.3	589.2	558.5
US & CA	319.3	231.3	216.3	227.1	330.3	264.9
Latin America	100.2	53.5	68.1	60.8	58.1	68.1
AU & NZ	44.2	65.5	52.3	61.2	52.2	55.1
Asia	175.4	156.8	222.0	149.1	148.5	170.4

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Tables 17 and 18 overleaf show the five-year development of non-national GBO in the individual markets. As GBO has been estimated by applying average local ticket prices to underlying admissions, the estimated market share of European films in terms of GBO corresponds with the estimated market shares in terms of admissions.

Table 18. GBO to European film exports on release in Europe (2015-2019)

In € million; Estimated; Ranked by 2019 figures

Rank	European markets	2015	2016	2017	2018	2019	5y avg.
1	DE	109.0	97.7	114.8	94.4	105.2	104.2
2	FR	74.5	78.6	66.3	95.5	78.9	78.8
3	IT	60.9	69.1	62.5	62.5	57.7	62.6
4	NL	30.3	37.6	36.4	46.4	47.1	39.6
5	ES	47.4	41.5	49.9	42.8	43.6	45.1
6	CH	51.9	46.4	42.9	38.8	40.3	44.1
7	AT	31.6	24.8	30.6	25.0	29.5	28.3
8	RU	32.6	19.9	47.6	29.7	27.3	31.4
9	PL	26.5	24.1	29.2	31.7	23.0	26.9
10	BE	2.0	23.1	27.4	31.2	22.9	21.3
11	SE*	15.6	21.8	3.6	-	17.1	14.5
12	GB	54.7	33.8	37.3	16.2	16.7	31.8
13	DK	11.6	19.4	18.2	14.0	14.2	15.5
14	NO	10.4	12.5	13.6	13.2	13.0	12.5
15	FI	6.5	9.0	6.5	10.3	10.9	8.6
16	GR	10.4	7.5	9.2	10.2	10.6	9.6
17	PT	9.1	5.9	8.3	9.8	8.5	8.3
18	CZ	7.2	6.1	9.0	9.4	7.4	7.8
19	SK	4.6	3.7	5.5	6.4	5.8	5.2
20	HU	6.1	5.0	5.6	7.8	5.2	5.9
21	TR	9.8	3.8	9.0	4.9	4.5	6.4
22	RO	4.4	2.7	5.3	5.2	3.2	4.2
23	EE	2.8	2.4	3.7	3.3	3.2	3.1
24	LT	2.1	1.8	3.4	3.1	2.9	2.7
25	HR	2.1	1.3	2.5	2.7	1.8	2.1
26	LU*	-	-	2.1	1.9	1.7	1.9
27	LV	1.6	2.0	2.4	2.4	1.7	2.0
28	BG	2.2	1.3	2.1	2.5	1.7	2.0
29	SI	1.9	1.8	1.7	2.2	1.7	1.8
30	IS	1.1	0.7	0.9	1.1	0.8	0.9

Rank	European markets	2015	2016	2017	2018	2019	5y avg.
31	BA*	-	0.4	0.5	0.8	0.7	0.6
32	CY*	-	0.4	0.5	0.6	0.3	0.4
33	ME*	-	0.3	-	0.3	0.3	0.3
34	MK*	-	-	-	0.2	0.2	0.2
35	GE*	-	0.3	-	-	-	0.3

*Limited or no data were available for certain markets (BA, CY, GE, LU, ME, MK and SE) and years (i.e. the data did not include European films exclusively released in BA, CY or GE in 2015).

Source: European Audiovisual Observatory / LUMIERE, Comscore

Table 19. GBO to European film exports on release in Europe (2015-2019)

In € million; Estimated; Ranked by 2019 figures

Rank	Non-European markets	2015	2016	1017	2018	2019	5y avg.
1	US	287.3	203.8	191.7	205.6	295.2	236.7
2	CN	115.0	96.6	162.3	90.8	98.4	112.6
3	AU	36.1	53.4	43.2	49.4	43.3	45.1
4	CA	32.0	27.6	24.6	21.5	35.2	28.2
5	MX	40.9	22.4	31.7	27.9	29.2	30.4
6	JP*	-	-	19.7	20.7	21.7	20.7
7	KR	31.0	28.4	29.4	25.3	19.4	26.7
8	BR	29.8	13.6	16.1	15.1	14.7	17.9
9	NZ	8.1	12.0	9.1	11.8	9.0	10.0
10	CO	10.3	4.6	7.9	7.2	7.9	7.6
11	HK*	-	-	8.0	8.2	7.0	7.7
12	AR	12.0	9.7	8.1	6.9	3.8	8.1
13	CL	4.6	2.4	3.0	3.6	2.4	3.2
14	SG*	-	-	2.5	4.1	2.0	2.9
15	VE*	2.5	0.8	1.3	0.2	-	1.2

*Limited or no data were available for certain markets (HK, JP, SG and VE) and years (i.e. the data did not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

4. BREAKING IT DOWN...

4.1. The most significant export markets for European films

In terms of number of releases

In Europe[6], the Swiss market featured the highest number of non-national European films tracked as on release in 2019 (964 films), ahead of Germany (887 films), Spain (560), the Netherlands (552) and Italy (540). Outside Europe, Australia stood out in respect of number of European films on release in 2019, with 207 titles, followed by the US and Mexico (162 films), Brazil (152) and South Korea (129). A total of 62 European films were tracked as on release in China, the highest level in five years. Hong Kong and Japan featured the lowest number of European films on release, with 38 and 26 titles, respectively.

It is important to note that variation in the coverage in LUMIERE can have an impact on the comparability of the number of non-national European films across countries.

In terms of admissions and GBO

The year 2019 saw the US confirming once again its long-established position as the largest export market for European films in terms of admissions. Growing 36% on 2018, European films sold 36.1 million tickets in the US in 2019, representing 20% of non-national admissions to European films. This compares to 20.4 million admissions in the China (11%), where ticket sales to European films dropped below the five-year average in 2019. Accounting for 7% of total non-national admissions (12.2 million), Germany took rank three, ahead of France (11.6 million) and Mexico (11.5 million) at short distance.

Thanks to a comparatively high average ticket price, the US confirmed its position as by far the largest export market for European films in terms of GBO takings in 2019. Based on the data available, the Observatory estimates that European films took EUR 295.2 million at the US box office, accounting for 25% of total GBO takings generated in non-national markets. In terms of GBO, Germany ranked second, with EUR 105.2 million (9% of total GBO takings to non-national European films worldwide), followed by China (8%, EUR 98.4 million), France (7%, EUR 78.9 million) and Italy (5%, EUR 57.7 million).

[6] While France represented the second-largest market for non-national European films in terms of admissions in 2019, only 204 non-national European films were tracked as on release in the country due to the limited number of films covered in Lumiere (836 in 2019).

Table 20. Number of European film exports by market (2019)

As tracked in LUMIERE; Ranked by number of European non-national films on release

Rank	Market	European non-national flms on release (2019)
1	CH - Switzerland	964
2	DE - Germany	887
3	ES - Spain	560
4	NL - Netherlands	552
5	IT - Italy	540
6	CZ - Czech Republic	493
7	NO - Norway	488
8	PT - Portugal	446
9	BE - Belgium	443
10	SK - Slovakia	385
11	MK - North Macedonia	324
12	LU - Luxembourg	288
13	HU - Hungary	287
14	RU - Russia	273
15	AT - Austria	259
16	SI - Slovenia	255
17	SE - Sweden	247
18	AU - Australia	207
19	FR - France	204
20	GB - United Kingdom	186
21	TR - Turkey	180
22	LT - Lithuania	176
23	US - USA	162
24	MX - Mexico	162
25	FI - Finland	153

Table 20 contd.

Rank	Market	European non-national flms on release (2019)
26	BR - Brazil	152
27	GR - Greece	149
28	EE - Estonia	143
29	RO - Romania	142
30	PL - Poland	131
31	ME - Montenegro	129
32	KR - South Korea	129
33	LV - Latvia	124
34	CO - Colombia	118
35	BG - Bulgaria	114
36	NZ - New Zealand	110
37	CA - Canada	105
38	BA - Bosnia and Herzegovina	102
39	AR - Argentina	97
40	DK - Denmark	83
41	IS - Iceland	70
42	CN - China	62
43	CL - Chile	57
44	HR - Croatia	54
45	SG - Singapore	42
46	HK - Hong Kong	38
47	JP - Japan	36
48	CY - Cyprus	28
	Total European export films on release	**3 954**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 21. Admissions and GBO to European film exports by market (2019)

Ranked by admissions; Admissions in million; GBO in € million estimated based on average ticket prices

Rank	Market	Non-national admissions to European films 2019 (in m.)	%	Non-national GBO to European films 2019 (in € m.)	%
1	US - USA	36.1	20%	295.2	25%
2	CN - China	20.4	11%	98.4	8%
3	DE - Germany	12.2	7%	105.2	9%
4	FR - France	11.6	6%	78.9	7%
5	MX - Mexico	11.5	6%	29.2	2%
6	IT - Italy	9.0	5%	57.7	5%
7	RU - Russia	7.8	4%	27.3	2%
8	ES - Spain	7.4	4%	43.6	4%
9	PL - Poland	5.2	3%	23.0	2%
10	NL - Netherlands	5.2	3%	47.1	4%
11	AU - Australia	4.8	3%	43.3	4%
12	CA - Canada	4.3	2%	35.2	3%
13	BR - Brazil	4.1	2%	14.7	1%
14	CO - Colombia	3.3	2%	7.9	1%
15	AT - Austria	3.1	2%	29.5	2%
16	KR - South Korea	3.0	2%	19.4	2%
17	CH - Switzerland	2.9	2%	40.3	3%
18	BE - Belgium	2.6	1%	22.9	2%
19	GB - United Kingdom	2.1	1%	16.7	1%
20	JP - Japan	2.0	1%	21.7	2%
21	TR - Turkey	1.7	1%	4.5	0%
22	GR - Greece	1.7	1%	10.6	1%
23	PT - Portugal	1.6	1%	8.5	1%
24	SE - Sweden	1.5	1%	17.1	1%
25	CZ - Czech Republic	1.3	1%	7.4	1%

Table 21 contd.

Rank	Market	Non-national admissions to European films 2019 (in m.)	%	Non-national GBO to European films 2019 (in € m.)	%
26	NZ - New Zealand	1.2	1%	9.0	1%
27	AR - Argentina	1.2	1%	3.8	0%
28	HU - Hungary	1.2	1%	5.2	0%
29	DK - Denmark	1.2	1%	14.2	1%
30	NO - Norway	1.1	1%	13.0	1%
31	SK - Slovakia	1.0	1%	5.8	0%
32	FI - Finland	1.0	1%	10.9	1%
33	HK - Hong Kong	0.8	0%	7.0	1%
34	RO - Romania	0.8	0%	3.2	0%
35	CL - Chile	0.6	0%	2.4	0%
36	EE - Estonia	0.5	0%	3.2	0%
37	LT - Lithuania	0.5	0%	2.9	0%
38	HR - Croatia	0.4	0%	1.8	0%
39	BG - Bulgaria	0.3	0%	1.7	0%
40	SG - Singapore	0.3	0%	2.0	0%
41	SI - Slovenia	0.3	0%	1.7	0%
42	LV - Latvia	0.3	0%	1.7	0%
43	BA - Bosnia and Herzegovina	0.2	0%	0.7	0%
44	LU - Luxembourg	0.2	0%	1.7	0%
45	IS - Iceland	0.1	0%	0.8	0%
46	ME - Montenegro	0.1	0%	0.3	0%
47	MK - North Macedonia	0.1	0%	0.2	0%
48	CY - Cyprus	0.04	0%	0.3	0%
	Total	**179.8**	**100%**	**1 198.5**	**100%**

Source: European Audiovisual Observatory, Comscore.

4.2. 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 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

The 3 954 European films on release in non-national markets worldwide in 2019 originated from 46 different countries.

The top 10 export countries in terms of numer of releases accounted for 74% of European film exports worldwide as well as in non-national markets in Europe. An even higher level of concentration could be observed in non-European markets, where as many as 88% of all European films on release originated from the top 10 ranking countries.

As in past years, France and the UK exported by far the largest number of films in 2019. As shown in Table 22, France led in terms of total films on release, with 942 French films on release outside France (905 in European markets, and 211 outside Europe). The United Kingdom ranked second with a total of 521 films on release outside the UK territories, 458 in Europe and 175 outside Europe. On a cumulative basis, French and UK films accounted for 37% of the total number of European export films on release worldwide (36% in Europe, and 53% outside Europe). Germany came third with 414 films on release in non-national markets in 2019 (401 in European territories and 63 outside Europe), ahead of Italy (330 films) and Spain (160).

In terms of admissions

In 2019, UK films alone accounted for 44% of total export admissions to European films worldwide, followed at a distance by French films (18%). Together, UK and French films therefore accounted for 62% of total non-national admissions to European films worldwide.

In European markets, UK and French films captured, respectively, 32% and 28% of total admissions to non-national European films. Outside Europe, UK films took have an even larger share, generating more than half (56%) of admissions to European films on release, far ahead of France (8%). UK and French films thus took together 64% of all admissions to European films outside Europe. While still high, this share was clearly lower than in 2018 (74%).

The dominance of UK films is naturally linked to the proliferation of UK films among the top 20 European films in terms of non-national admissions[7]: In 2019, UK films accounted for six out of the top 10 and nine out of the top 20 European export films worldwide.

As shown in Table 23, UK films cumulatively sold 79.6 million tickets in non-national markets (52.3 million outside Europe) outdistancing all other European countries; France came second with 32.4 million tickets sold in export markets worldwide, ahead of Spain (10.9 million), Germany (10.8 million), Russia and Belgium (8.5 million).

[7] See Tables 31, 32 and 33 for the lists of the top 50 European films in terms of admissions generated in non-national markets.

Table 22. Number of European film exports by country of origin (2019)

Ranked by total number of films on release in all non-national markets tracked in LUMIERE

Rank	Country of origin	Non-nat. releases worldwide	% share	Non-nat. releases in Europe	% share	Releases outside Europe	% share
1	FR - France	942	24%	905	24%	211	29%
2	GB - United Kingdom	521	13%	458	12%	175	24%
3	DE - Germany	414	10%	401	11%	63	9%
4	IT - Italy	330	8%	319	9%	54	7%
5	ES - Spain	160	4%	138	4%	48	7%
6	SE - Sweden	133	3%	130	3%	12	2%
7	RU - Russia	118	3%	105	3%	30	4%
8	DK - Denmark	116	3%	114	3%	15	2%
9	CZ - Czech Republic	110	3%	108	3%	3	0%
10	AT - Austria	91	2%	91	2%	6	1%
11	CH - Switzerland	87	2%	84	2%	8	1%
12	NO - Norway	85	2%	82	2%	9	1%
13	BE - Belgium	81	2%	78	2%	14	2%
14	NL - Netherlands	78	2%	75	2%	5	1%
15	PL - Poland	72	2%	72	2%	8	1%
16	TR - Turkey	67	2%	66	2%	5	1%
17	IE - Ireland	63	2%	56	1%	18	2%
18	FI - Finland	51	1%	50	1%	6	1%
19	SU - Soviet Union[8]	48	1%	48	1%	1	0%
20	HU - Hungary	41	1%	39	1%	5	1%
21	RS - Serbia	40	1%	39	1%	2	0%
22	HR - Croatia	33	1%	33	1%		0%
23	RO - Romania	29	1%	28	1%	6	1%
24	IS - Iceland	25	1%	24	1%	6	1%
25	YU - Yugoslavia[9]	25	1%	25	1%		0%
26	SK - Slovakia	24	1%	24	1%		0%
27	GR - Greece	23	1%	22	1%	1	0%
28	PT - Portugal	21	1%	17	0%	6	1%
29	LT - Lithuania	17	0%	16	0%	1	0%
30	BG - Bulgaria	15	0%	15	0%	1	0%
31	LV - Latvia	15	0%	15	0%		0%
	Other	79	2%	75	2%	11	0%
	Total European export films	**3 954**	**100%**	**3 752**	**100%**	**730**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

[8] Films produced until 1991.
[9] Films produced until 1992.

Table 23. Admissions to European film exports by country of origin (2019)

Ranked by non-national global admissions as tracked in LUMIERE

Rank	Country of origin	Non-national admissions worldwide	% share	Non-national admissions in Europe	% share	Admissions outside Europe	% share
1	GB - United Kingdom	79 649 425	44%	27 320 843	32%	52 328 582	56%
2	FR - France	32 391 440	18%	24 487 690	28%	7 903 750	8%
3	ES - Spain	10 869 485	6%	4 810 598	6%	6 058 887	6%
4	DE - Germany	10 792 987	6%	6 307 623	7%	4 485 364	5%
5	RU - Russia	8 458 018	5%	1 707 883	2%	6 750 135	7%
6	BE - Belgium	8 454 617	5%	6 412 964	7%	2 041 653	2%
7	IT - Italy	6 990 164	4%	1 963 458	2%	5 026 706	5%
8	IE - Ireland	4 885 906	3%	1 971 878	2%	2 914 028	3%
9	NO - Norway	3 074 762	2%	1 123 255	1%	1 951 507	2%
10	PL - Poland	2 033 007	1%	1 004 743	1%	1 028 264	1%
11	DK - Denmark	1 840 869	1%	1 473 525	2%	367 344	0%
12	NL - Netherlands	1 794 457	1%	282 958	0%	1 511 499	2%
13	TR - Turkey	1 444 007	1%	1 423 924	2%	20 083	0%
14	SE - Sweden	1 288 428	1%	1 153 087	1%	135 341	0%
15	CZ - Czech Republic	1 089 354	1%	1 081 500	1%	7 854	0%
16	IS - Iceland	876 076	0%	669 072	1%	207 004	0%
17	UA - Ukraine	522 913	0%	256 450	0%	266 463	0%
18	AT - Austria	516 593	0%	436 013	1%	80 580	0%
19	CH - Switzerland	408 956	0%	371 900	0%	37 056	0%
20	LU - Luxembourg	318 722	0%	264 824	0%	53 898	0%
21	HU - Hungary	288 169	0%	224 922	0%	63 247	0%
22	RS - Serbia	256 741	0%	253 784	0%	2 957	0%
23	FI - Finland	231 958	0%	154 894	0%	77 064	0%
24	LV - Latvia	199 836	0%	199 836	0%		0%
25	MK - North Macedonia	189 703	0%	110 762	0%	78 941	0%
26	SK - Slovakia	155 901	0%	155 901	0%		0%
27	SU - Soviet Union[10]	134 053	0%	127 175	0%	6 878	0%
28	GR - Greece	106 191	0%	47 238	0%	58 953	0%
29	PT - Portugal	104 440	0%	76 083	0%	28 357	0%
30	RO - Romania	90 086	0%	40 781	0%	49 305	0%
31	BY - Belarus	68 706	0%	68 706	0%		0%
	Other	308 134	0%	261 774	0%	46 360	0%
	Total European export films	**179 834 104**	**100%**	**86 246 044**	**100%**	**93 588 060**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Comscore

[10] Films produced until 1991.

In terms of significance of non-national markets

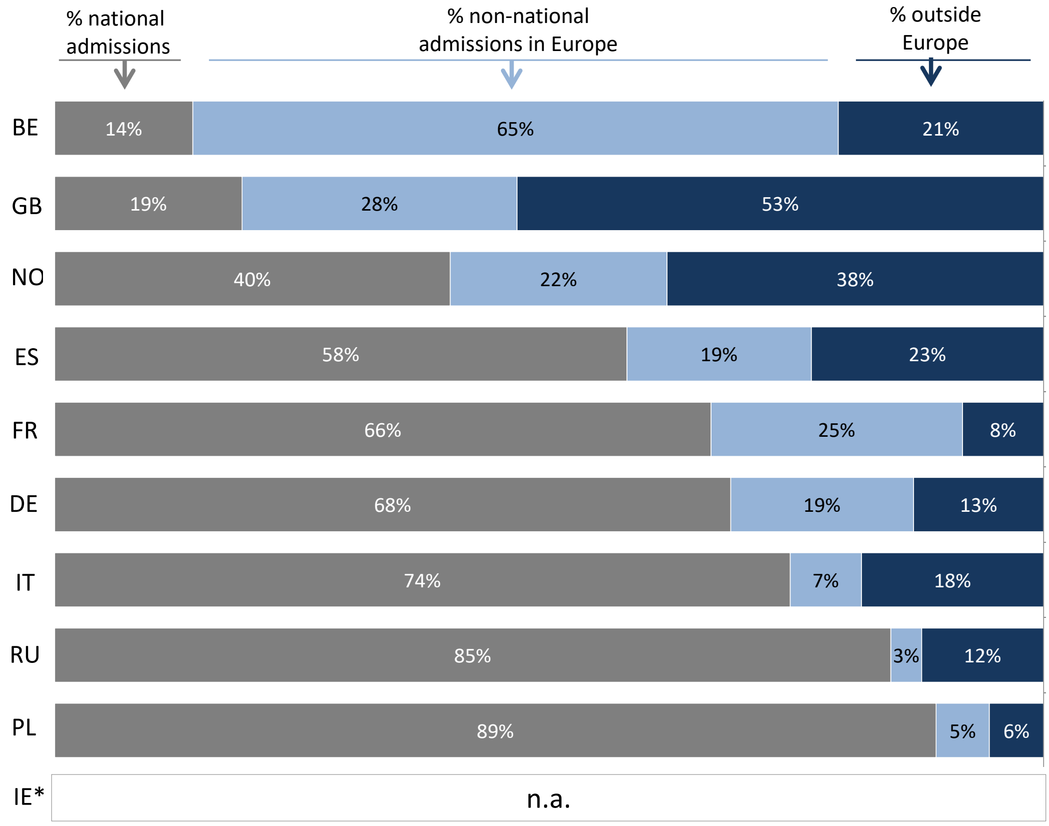
How important are non-national admissions for the various European countries? Figure 13 shows the percentage shares of admissions in national, non-national European and non-European markets for each of the top 10 European film-exporting countries in terms of non-national admissions as identified in Table 23 on the previous page. The complete breakdown for all European countries can be found in Table 24 overleaf.

In 2019, Belgium and the UK stood out as the two export markets with the highest share of European export admissions (86% and 81% respectively). Belgium was the top export country considering export admissions in Europe (65%) in 2019. In contrast, the UK clearly had the highest exposure to non-European markets, generating 53% of its worldwide ticket sales outside Europe.

In Norway, export admissions generated 60% of ticket sales, ahead of Spain (42%) and France (34%). The share of international admissions could not be estimated for Ireland due to the lack of separate admissions data for the Irish market, which is generally reported together with the UK market.

Figure 13. Breakdown of worldwide admissions to the top 10 exporting countries of European films in terms of admissions by origin of admissions (2019)

Ranked by estimated share of non-national admissions



* The breakdown for Irish films could not be estimated due to the fact that the Irish and UK market are treated as one market in the LUMIERE database. As a result, national and non-national admissions cannot be calculated in a reliable manner. In the case of Sweden, LUMIERE coverage is insufficient due to the lack of data.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 24. Admissions breakdown for European films : National vs. non-national (2019)

Estimated. Ranked alphabetically. As tracked in LUMIERE.

Rank	Country of origin	% share – national adm.	% share – non-nat. adm.	% share – non-nat. adm. in Europe	% share – non-nat. adm . outside Europe
1	AT - Austria	39%	61%	52%	10%
2	BA - Bosnia and Herzegovina	8%	92%	65%	27%
3	BE - Belgium	14%	86%	65%	21%
4	BG - Bulgaria	89%	11%	10%	0%
5	CH - Switzerland	67%	33%	30%	3%
6	CY - Cyprus	72%	28%	28%	0%
7	CZ - Czech Republic	81%	19%	19%	0%
8	DE - Germany	68%	32%	19%	13%
9	DK - Denmark	65%	35%	28%	7%
10	EE - Estonia	95%	5%	4%	0%
11	ES - Spain	58%	42%	19%	23%
12	FI - Finland	85%	15%	10%	5%
13	FR - France	66%	34%	25%	8%
14	GB - United Kingdom	19%	81%	28%	53%
15	GR - Greece	80%	20%	9%	11%
16	HR - Croatia	93%	7%	7%	0%
17	HU - Hungary	71%	29%	22%	6%
18	IS - Iceland	5%	95%	72%	22%
19	IT - Italy	74%	26%	7%	18%
20	LT - Lithuania	95%	5%	5%	0%
21	LU - Luxembourg	7%	93%	78%	16%
22	LV - Latvia	73%	27%	27%	0%
23	MK - North Macedonia	15%	85%	50%	35%
24	NL - Netherlands	72%	28%	4%	23%
25	NO - Norway	40%	60%	22%	38%
26	PL - Poland	89%	11%	5%	6%
27	PT - Portugal	87%	13%	10%	4%
28	RO - Romania	90%	10%	5%	6%
29	RU - Russia	85%	15%	3%	12%
30	SE - Sweden	60%	40%	36%	4%
31	SI - Slovenia	92%	8%	8%	0%
32	SK - Slovakia	84%	16%	16%	0%
33	TR – Turkey	96%	4%	4%	0%
	Total Europe	**59%**	**41%**	**19%**	**21%**

Note: This breakdown cannot be provided for the following countries due to a lack of (sufficient) 2019 admissions data in their respective home markets in the LUMIERE database: Albania (AL), Armenia (AM), Azerbaijan (AZ), Belarus (BY), Georgia (GE), Ireland (IE), Kosovo (XK), Liechtenstein (LI), Serbia (RS), Ukraine (UA).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

4.3. Concentration of admissions to European export films

Naturally, the cumulative figures for European films do not offer any information about how many European films actually generated a significant number of admissions outside their national markets. This chapter takes a closer look at the concentration of non-national admissions to European films. It reveals that the number of European film exports generating large amounts of ticket sales is actually quite small.

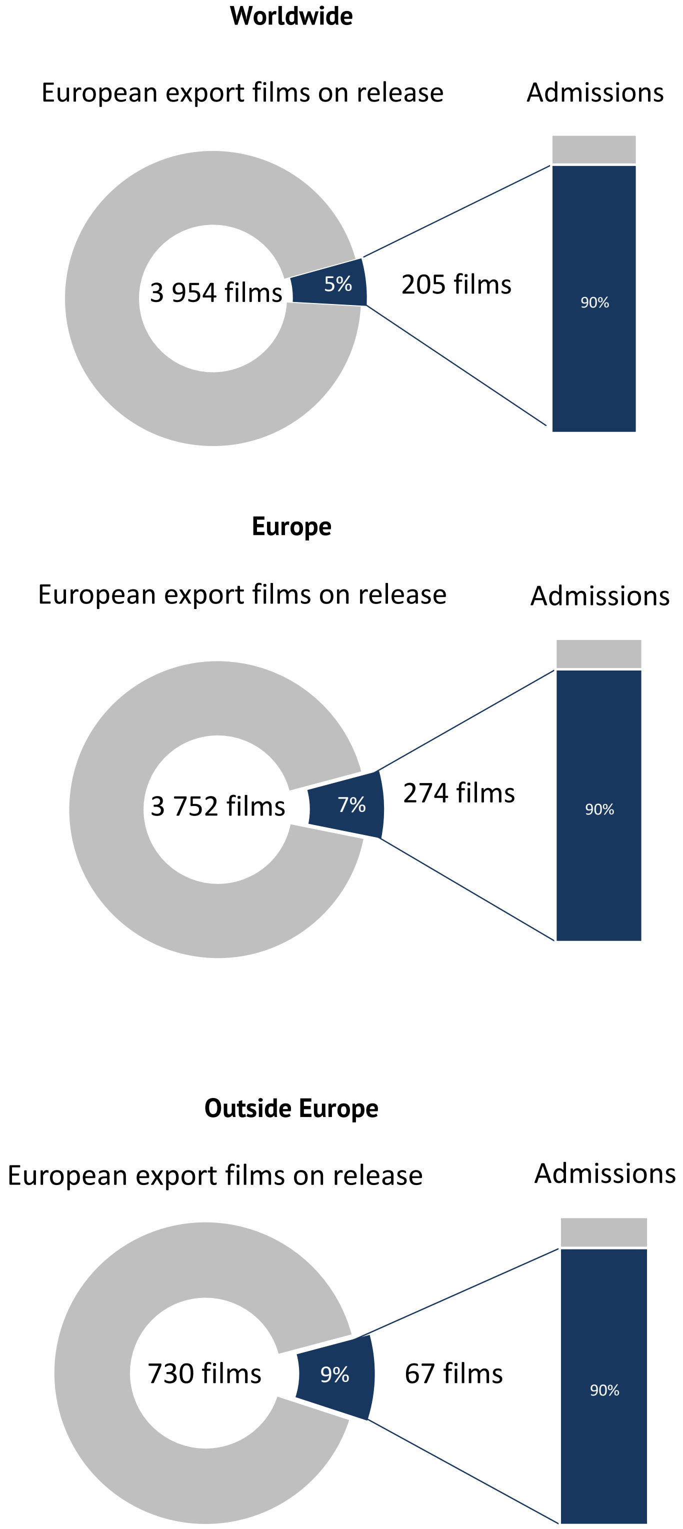
As shown in Figure 14, 205 films, or only 5% of all the 3 954 non-national European films on release globally, accounted for 90% of total admissions generated by European films in non-national markets worldwide in 2019. In other words, nine out of 10 tickets sold to European film exports worldwide were sold for a screening of one of only 205 European export films, which cumulatively generated 161.9 million ticket sales. The remaining 3 749 non-national European films on release (95% of the total number of European films on release outside their respective home markets) cumulatively generated only 18 million admissions.

The concentration level of non-national admissions was similar when looking at European markets only, where 274 films, or 7% of the 3 752 non-national European films on release, generated 90% of non-national admissions to European films, corresponding to 77.6 million admissions.

Outside Europe, 67 films, representing 9% of the 730 European films on release, took 90% of ticket sales generated by European films (84.2 million admissions) in 2019.

Figure 14. Concentration of admissions to European film exports (2019)

As tracked in LUMIERE



Source: European Audiovisual Observatory / LUMIERE, Comscore.

92% of European film exports sold fewer than 50 000 tickets in non-national markets worldwide

Another way to look at the concentration of admissions among the various European films is to count the number of films by admissions brackets. Nine out of 10 European film exports (92%) generated fewer than 50 000 admissions in non-national markets worldwide in 2019, and 61% even sold fewer than 1 000 tickets outside their home markets (see Table 25). Compared to 2018, the number of European blockbuster film exports that managed to sell more than five million tickets increased from four to five films. As shown in the time series depicted in Table 26, this number was higher in the years 2015 to 2017. Another 26 European films sold between one and five million tickets in non-national markets in 2019, in line with the five-year average. The number of films generating between 500 000 and one million non-national admissions (22) was well below the five-year average (33). A total of 133 European exports sold between 100 000 and 500 000 admissions in 2019, down from an exceptionally high 155 films in 2018.

Table 25. Number of European film exports by admissions brackets on release worldwide (2019)

As tracked in LUMIERE. Figures may not sum to totals due to rounding

Admissions bracket	Number of European film exports	% *share*	Cumulative non-national admissions worldwide (in m.)	% *share*	Average admissions within bracket
[5 m. - [	5	0.1%	54.6	30%	10.9 m.
[1 m. - 5 m.[	26	1%	59.5	33%	2.3 m.
[500' - 1 m.[	22	1%	15.4	9%	699 888
[100' - 500'[	133	3%	29.7	17%	223 595
[50' - 100'[	116	3%	7.9	4%	68 399
[10' - 50'[	395	10%	9.1	5%	23 000
[1' - 10'[	844	21%	3.1	2%	3 617
[1 - 1'[	2 413	61%	0.5	0%	191
Total	**3 954**	**100%**	**179.8**	**100%**	**45 482**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 26. Number of European film exports on release worldwide by admissions brackets (2015-2019)

As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Admissions bracket	2015	2016	2017	2018	2019	5y average
[5 m. - [	8	7	7	4	5	6
[1 m. - 5 m.[	25	28	21	28	26	26
[500' - 1 m.[	32	36	39	37	22	33
[100' - 500'[	117	125	141	155	133	134
[50' - 100'[	80	98	96	108	116	100
[10' - 50'[	324	378	345	377	395	364
[1' - 10'[	744	855	776	821	844	808
[1 - 1'[	1 907	2 006	2 179	2 345	2 413	2 170
Total	**3 236**	**3 532**	**3 605**	**3 875**	**3 954**	**3 640**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 27. Admissions to European film exports on release worldwide by admissions brackets (2015-2019)

In millions; As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019)

Admissions bracket	2015	2016	2017	2018	2019	5y average
[5 m. - [	102.7	52.5	75.9	48.7	54.6	66.9
[1 m. - 5 m.[	42.9	51.5	45.6	50.8	59.5	50.1
[500' - 1 m.[	21.1	23.4	27.4	26.4	15.4	22.7
[100' - 500'[	23.8	26.7	31.5	34.8	29.7	29.3
[50' - 100'[	5.3	6.6	6.9	7.9	7.9	6.9
[10' - 50'[	6.8	7.8	7.9	8.9	9.1	8.1
[1' - 10'[	2.7	2.8	2.9	3.0	3.1	2.9
[1 - 1'[	0.3	0.4	0.4	0.5	0.5	0.4
Total (in m.)	**205.5**	**171.7**	**199**	**180.9**	**179.8**	**187.3**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 28. Share of non-national European films on release worldwide by admissions brackets (2015-2019)

In % of annual total; As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Admissions bracket	2015	2016	2017	2018	2019	5y average
[5 m. - [	50%	31%	38%	36%	30%	37%
[1 m. - 5 m.[	21%	30%	23%	22%	33%	26%
[500' - 1 m.[	10%	14%	14%	16%	9%	12%
[100' - 500'[	12%	16%	16%	17%	17%	15%
[50' - 100'[	3%	4%	3%	4%	4%	4%
[10' - 50'[	3%	5%	4%	4%	5%	4%
[1' - 10'[	1%	2%	1%	1%	2%	1%
[1 - 1'[	0%	0%	0%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Top 10 films accounted for 42% of total non-national admissions to European films in 2019

Another way to measure admissions concentration levels is shown in Table 29, which measures cumulative market share for various “top brackets”: With 17.2 million admissions, *Downtown Abbey*, the most successful European film export in 2019, accounted alone for 10% of cumulative admissions to European films generated in non-national markets worldwide. The top 10 films cumulatively accounted for 42% of total international admissions, the top 50 films for 71% and the top 100 films for 81%.

Table 29. Number of and admissions of European film exports worldwide by top brackets (2019)

In millions; As tracked in LUMIERE; Cumulative admissions indicated in millions

Top bracket	Number of European film exports	*% share*	Cumulative admissions in non-national markets worldwide (in m.)	*% share*	Average admissions within bracket
Top 1 film	1	0%	17.2	10%	17.2 m.
Top 10 films	10	0%	74.8	42%	7.5 m.
Top 50 films	50	1%	128.0	71%	2.6 m.
Top 100 films	100	3%	145.7	81%	1.5 m.
Other	3 854	97%	34.1	19%	8 859
Total	**3 954**	**100%**	**179.8**	**100%**	**45 482**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 30. Admissions to European film exports worldwide by top brackets (2015-2019)

In millions; As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019)

Top bracket	2015	2016	2017	2018	2019	5y average
Top 1	34.5	18.2	27.3	15.5	17.2	22.5
Top 10	112.4	68.3	89.3	67.0	74.8	82.3
Top 50	161.0	119.1	139.1	114.8	128.0	132.4
Top 100	179.9	140.8	162.1	138.1	145.7	153.3
Other	25.6	30.9	36.4	42.8	34.1	34.0
Total	**205.5**	**171.7**	**198.5**	**180.9**	**179.8**	**187.3**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

As shown in Table 31, these concentration levels are more or less in line with the levels observed for the years 2016 to 2018, and in contrast with 2015, which featured a much higher concentration of admissions due to the exceptional success of the film *Taken 3*.

Table 31. Share of admissions to European film exports worldwide by top brackets (2015-2019)

In % of annual total; As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Top bracket	2015	2016	2017	2018	2019	5y average
Top 1	17%	11%	14%	9%	10%	12%
Top 10	55%	40%	45%	37%	42%	44%
Top 50	78%	69%	70%	63%	71%	70%
Top 100	88%	82%	82%	76%	81%	82%
Other	12%	18%	18%	24%	19%	18%
Total (in m.)	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

4.4. Diversity of European export film offerings

Important note: Assessing diversity in a more qualitative sense is a complex task beyond the scope of this report. As specified in the methodological remarks, the 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 for 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 non-national market to another, or whether more or less the same films were shown across non-national markets. This chapter furthermore provides a breakdown by country of origin and age of productions.

European film portfolio varied significantly from one market to the next

As illustrated in Figure 15 and Table 32 overleaf, in 2019, 56% of the 3 954 European films on theatrical release in at least one non-national market worldwide were screened in only a single non-national territory (2 210 films). Another 667 films (17%) were on release in only two non-national markets. This means that almost three out of four European export films were screened in only one or two non-national markets among the 48 territories covered in this report. Conversely only about one in four European export films were screened in three or more international markets in 2019. In fact, only 411 European films, or 10% of European export films, were on release in six or more non-national markets, cumulatively capturing 78% of total admissions to European film exports.

These figures are very similar when looking at films on release in European non-national markets, where only 10% of films on release (2 108 titles) were screened in six or more territories in 2019, accounting for as much as 82% of total admissions.

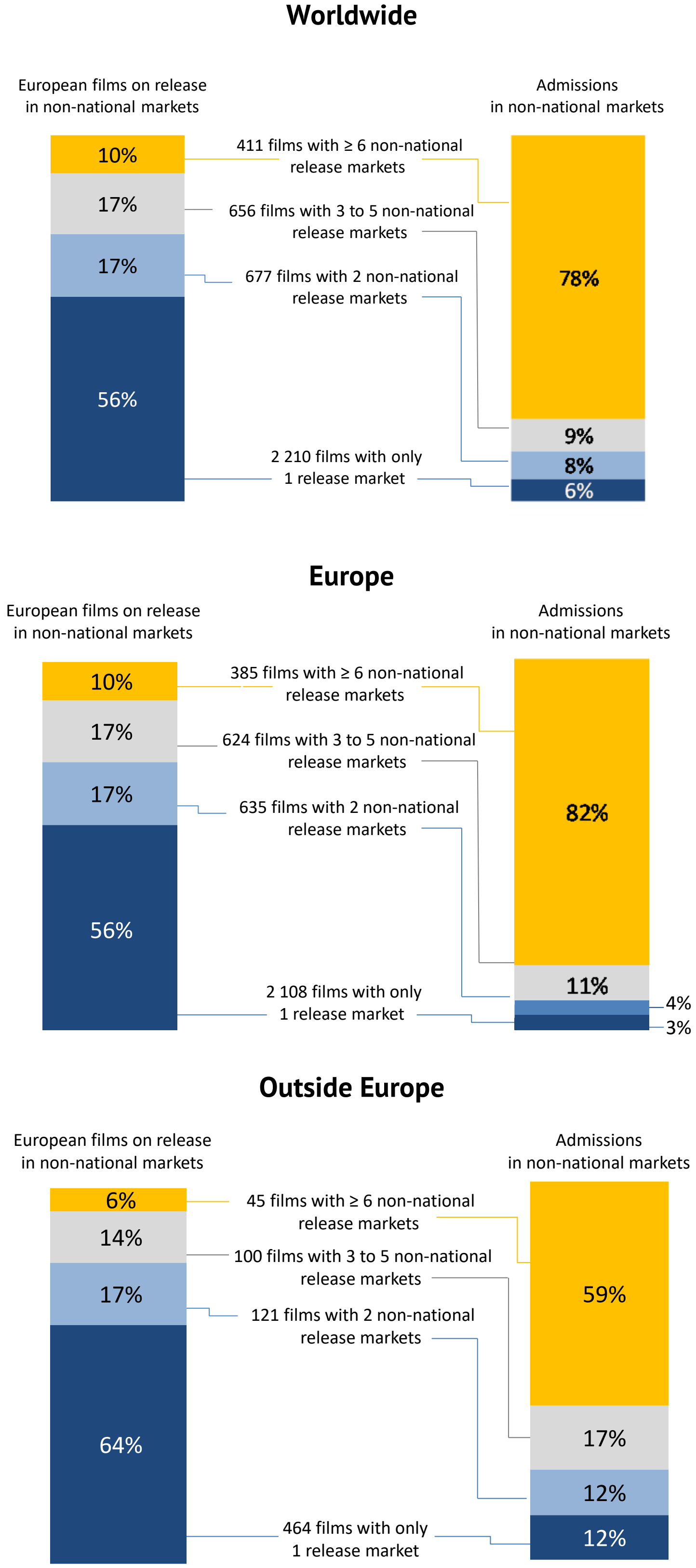
Outside Europe, the share of European films distributed in only one release market was 64% (464 films). A total of 20% of films were released in three or more markets (145 films), while 6% (45 films) were released in more than six territories, generating 59% of admissions to European films outside Europe.

Given the limitations in the coverage in LUMIERE for certain countries and years[11], the comparison of the number of films per release market bracket over the past five years offers only indications, and no conclusive observations[12]. Having said this, the big-picture insight remains that despite consistent, albeit modest, growth, only a very small number of European films made it to release in a large number of non-national territories, while the vast majority of export films were released in only one or two markets. Implicitly this means that the portfolio of non-national European films on release actually varies to a large extent from one territory to another.

[11] Outside Europe, no title-by-title data for Hong Kong, Japan and Singapore were available for the years 2015 and 2016, and no data were available for Venezuela in 2019. In European markets, limited data or no data were available for certain years in BA, CY, GE, LU, ME, MK and SE. More information on estimated coverage rates in LUMIERE is included in the appendix to this report.

Figure 15. Concentration of European film exports by number of release markets (2019)

As tracked in LUMIERE



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 32. Concentration of European film exports by number of release markets (2019)

As tracked in LUMIERE; Cumulative admissions in millions

Worldwide					
Nr. of non-national release markets	European film exports	*% share*	Cumulative admissions	*% share*	Average admissions
1	2 210	56%	10 998 862	6%	4 977
2	677	17%	13 578 835	8%	20 057
3 to 5	656	17%	15 824 349	9%	24 122
6 to 10	241	6%	12 050 382	7%	50 002
> 10	170	4%	127 381 676	71%	749 304
Total	**3 954**	**100%**	**179 834 104**	**100%**	**45 482**

Europe					
Nr. of non-national release markets	European film exports	*% share*	Cumulative admissions	*% share*	Average admissions
1	2 108	56%	2 934 005	3%	1 392
2	635	17%	3 169 996	4%	4 992
3 to 5	624	17%	9 058 690	11%	14 517
6 to 10	244	7%	9 684 141	11%	39 689
> 10	141	4%	61 399 212	71%	435 455
Total	**3 752**	**100%**	**86 246 044**	**100%**	**22 987**

Outside Europe					
Nr. of non-national release markets	European film exports	*% share*	Cumulative admissions	*% share*	Average admissions
1	464	64%	11 029 315	12%	23 770
2	121	17%	11 247 149	12%	92 952
3 to 5	100	14%	15 872 997	17%	158 730
6 to 10	32	4%	8 878 157	9%	277 442
> 10	13	2%	46 560 442	50%	3 581 572
Total	**730**	**100%**	**93 588 060**	**100%**	**128 203**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 33. European film exports by number of release markets (2015-2019)

As tracked in LUMIERE (does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019).

Worldwide						
Nr. of non-national release markets	2015	2016	2017	2018	2019	5y average
1	1 871	2 061	2 018	2 143	2 210	2 061
2	550	614	608	636	677	617
3 to 5	479	492	577	642	656	1
6 to 10	188	196	218	239	241	217
> 10	147	169	183	215	170	177
Total	**3 236**	**3 532**	**3 605**	**3 875**	**3 954**	**3 640**

Europe						
Nr. of non-national release markets	2015	2016	2017	2018	2019	5y average
1	1 829	1 970	1 927	2 093	2 108	1 986
2	534	596	579	621	635	593
3 to 5	450	452	552	607	624	1
6 to 10	164	196	209	218	244	206
> 10	111	123	135	172	141	137
Total	**3 089**	**3 337**	**3 403**	**3 711**	**3 752**	**3 458**

Outside Europe						
Nr. of non-national release markets	2015	2016	2017	2018	2019	5y average
1	365	427	434	408	464	420
2	97	89	102	113	121	104
3 to 5	92	94	97	114	100	99
6 to 10	38	34	36	52	32	38
> 10	7	6	2	9	13	7
Total	**599**	**650**	**671**	**696**	**730**	**669**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 34. Breakdown of admissions to European films exports by number of release markets (2015-2019)

In millions; As tracked in LUMIERE (does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019)

Worldwide

Nr. of non-national release markets	2015	2016	2017	2018	2019	5y average
1	4.9	9.4	4.3	5.6	11.0	7.0
2	9.1	5.9	7.9	5.2	13.6	8.3
3 to 5	10.9	14.9	21.0	15.2	15.8	15.6
6 to 10	15.4	20.4	18.6	16.5	12.1	16.6
> 10	165.2	121.3	146.7	138.3	127.4	139.8
Total	**205.5**	**171.7**	**198.5**	**180.9**	**179.8**	**187.3**

Europe

Nr. of non-national release markets	2015	2016	2017	2018	2019	5y average
1	3.6	4.1	3.4	4.7	2.9	3.8
2	4.2	4.4	4.9	3.6	3.2	4.1
3 to 5	9.2	8.5	10.4	9.2	9.1	9.3
6 to 10	10.9	15.9	12.5	11.4	9.7	12.1
> 10	66.2	53.8	64.8	65.0	61.4	62.2
Total	**94.1**	**86.7**	**96.0**	**93.9**	**86.2**	**91.4**

Outside Europe

Nr. of non-national release markets	2015	2016	2017	2018	2019	5y average
1	4.7	10.3	5.4	10.2	11.0	8.3
2	8.0	5.4	7.3	7.3	11.2	7.9
3 to 5	8.0	15.7	27.4	15.3	15.9	16.5
6 to 10	37.4	30.4	31.4	16.8	8.9	25.0
> 10	50.1	19.8	25.4	37.3	46.6	35.8
Total	**108.2**	**81.6**	**96.9**	**87.0**	**93.6**	**93.5**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 35. Breakdown of admissions to European film exports by number of release markets in % (2015-2019)

In %; As tracked in LUMIERE (does not include European films exclusively released in HK, JP or SG for the years 2015 and 2016, and in VE for 2019)

Worldwide						
Nr. of non-national release markets	**2015**	**2016**	**2017**	**2018**	**2019**	**5y median**
1	2%	5%	2%	3%	6%	3%
2	4%	3%	4%	3%	8%	4%
3 to 5	5%	9%	11%	8%	9%	9%
6 to 10	7%	12%	9%	9%	7%	9%
> 10	80%	71%	74%	76%	71%	74%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Europe						
Nr. of non-national release markets	**2015**	**2016**	**2017**	**2018**	**2019**	**5y median**
1	4%	5%	4%	5%	3%	4%
2	4%	5%	5%	4%	4%	4%
3 to 5	10%	10%	11%	10%	11%	10%
6 to 10	12%	18%	13%	12%	11%	12%
> 10	70%	62%	67%	69%	71%	69%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Outside Europe						
Nr. of non-national release markets	**2015**	**2016**	**2017**	**2018**	**2019**	**5y median**
1	4%	13%	6%	12%	12%	12%
2	7%	7%	8%	8%	12%	8%
3 to 5	7%	19%	28%	18%	17%	18%
6 to 10	35%	37%	32%	19%	9%	32%
> 10	46%	24%	26%	43%	50%	43%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

French and British films represented majority of European film exports in 2019

The breakdown of the number of European films on release in 2019, as well as admissions to them by country of origin, has already been commented on in Chapter 4.2. Looking at the diversity of the European theatrical film offering, though, it can be noted that, as in past years, France and the UK exported by far the largest number of films among the European countries.

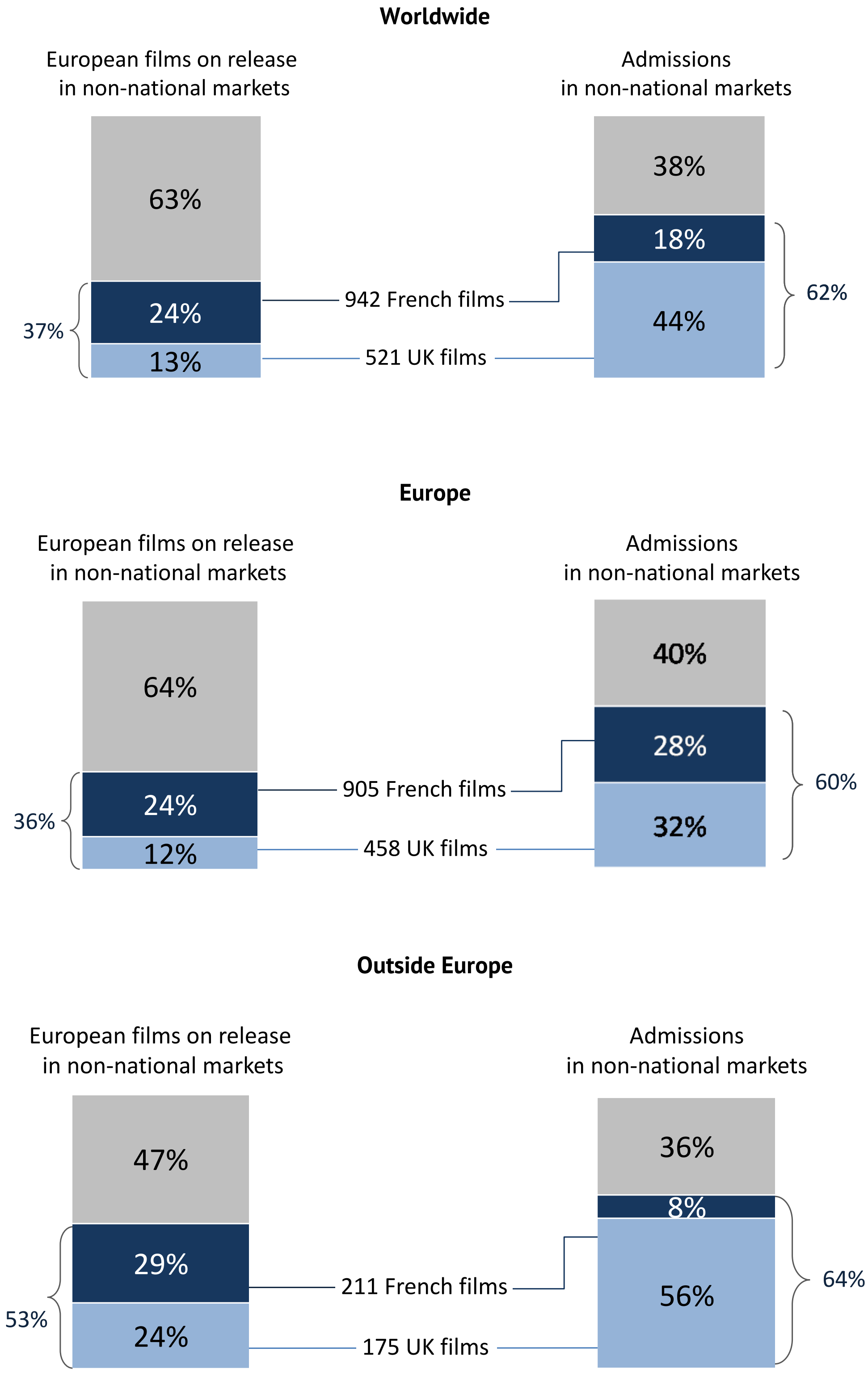
In 2019, French and UK production cumulatively accounted for more than one third (37%) of European films screened in at least one non-national territory worldwide (see Figure 16). In terms of admissions, UK and French films cumulatively accounted for 62% of total non-national admissions to European films worldwide. The lion's share of these was sold for UK films, which captured 44% of total non-national admissions to European films despite representing only 13% of European film exports on release.

A similar pattern could be observed in European markets, where French and UK productions represented 36% of European non-national films on release and generated 60% of non-national admissions. UK films – representing 12% of European non-national films available – captured 32% of ticket sales for European film exports in Europe.

Outside Europe, French and UK films accounted together for more than half (53%) of the European film offering, generating 64% of admissions to European films in 2019. This figure was lower compared to 2018 (74%), but comparable with the level registered in 2017 (66%). UK productions, which alone represented almost a quarter of the offering of European films outside Europe (24%), captured 44% of international admissions in 2019.

Figure 16. Share of French and UK films among European film exports (2019)

Estimated; As tracked in LUMIERE



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Recent productions accounted for 91% of European film exports globally

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

As illustrated in Figure 17 and Table 36, recent productions, namely films produced in 2018 or 2019, accounted for 37% of the European export films on release worldwide but generated 91% of total non-national admissions in 2019. While three-to-five-year-old productions (produced between 2015 and 2017) accounted for another 25% (993 films) of non-national European films on release, they cumulatively captured only about 6% of total admissions. Another 1 508 (38%) European films on release were produced before or in 2014, and cumulatively accounted for only 3% of admissions.

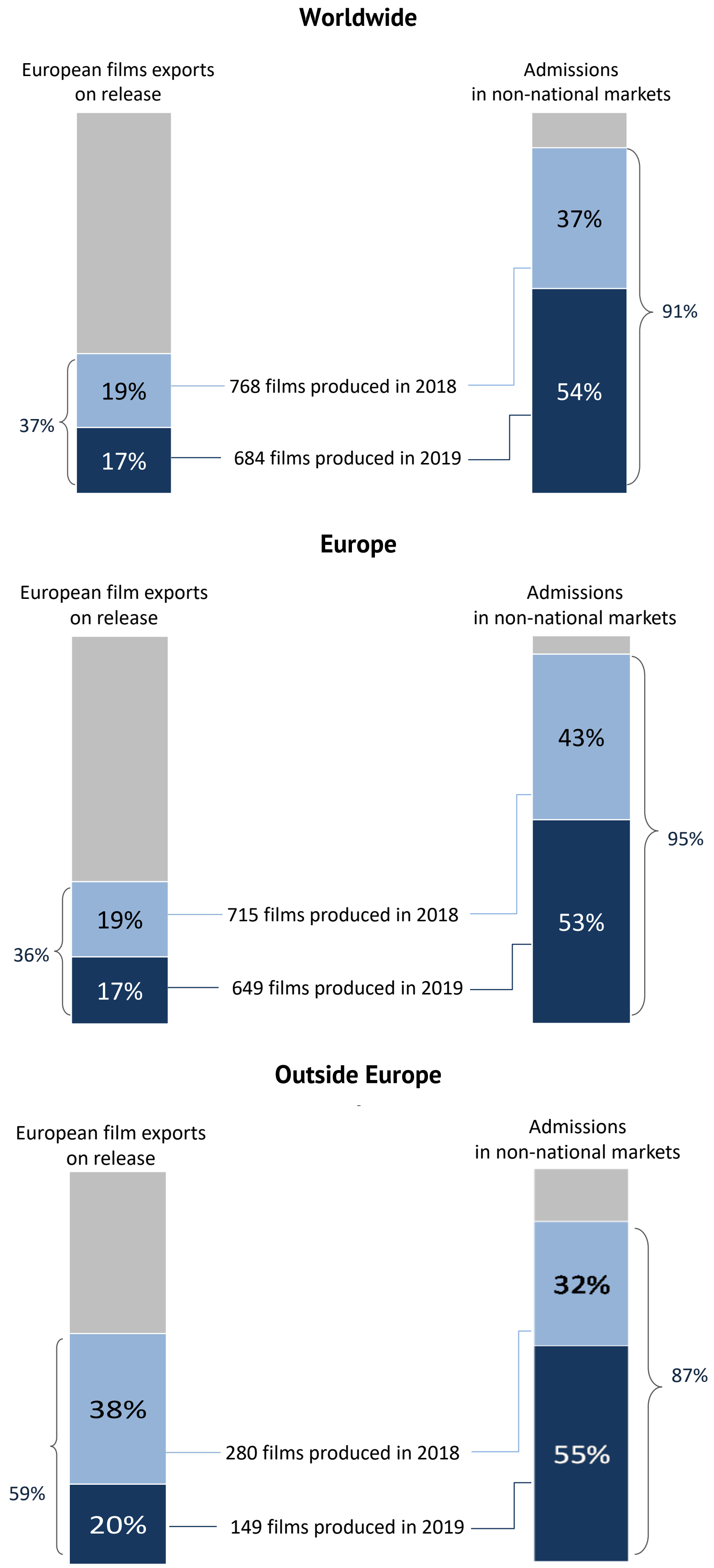
Looking at European markets, recent films (produced in 2018 or 2019), accounted for 36% of non-national European export films on release, while capturing as much as 95% of non-national admissions. Films produced in or before 2017 represented 64% of films on release but generated an insignificant portion of admissions (5%).

Outside Europe, recent productions accounted for 59% of European films on release and took 87% of non-national admissions. Films produced between 2015 and 2017 represented 26% of European films on release and 8% of admissions, while older productions made for 15% of films on release and generated only 5% of ticket sales.

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 a limited number of older European, films which do not, however, generate large numbers of admissions. The figures also show a certain time lag, with a significant number of European films released in their non-national markets one or two years after their production year.

Figure 17. Share of recent European films among European film exports (2019)

Estimated; As tracked in LUMIERE



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 36. Concentration of European film exports by production year (2019)

Estimated; As tracked in LUMIERE

Worldwide						
Production year	**European film exports on release**	***% share***	***Cumulative % share***	**Admissions in non-national markets**	***% share***	***Cumulative % share***
2019	684	17%	17%	96 768 624	54%	54%
2018	768	19%	37%	66 451 362	37%	91%
2017	511	13%	50%	7 915 674	4%	95%
2016	283	7%	57%	1 953 584	1%	96%
2015	199	5%	62%	962 054	1%	97%
[2001-2014]	851	22%	83%	449 521	0%	97%
[1991-2000]	171	4%	88%	4621383	3%	100%
[1900-1990]	486	12%	100%	711 829	0%	100%
TOTAL	**3 953**	**100%**		**179 834 031**	**100%**	

Europe						
Production year	**European film exports on release**	***% share***	***Cumulative % share***	**Admissions in non-national markets**	***% share***	***Cumulative % share***
2019	649	17%	17%	45 325 253	53%	53%
2018	715	19%	36%	36 872 164	43%	95%
2017	469	13%	49%	2 629 361	3%	98%
2016	272	7%	56%	385 019	0%	99%
2015	191	5%	61%	186 325	0%	99%
[2001-2014]	828	22%	83%	293 331	0%	99%
[1991-2000]	168	4%	88%	100646	0%	99%
[1900-1990]	459	12%	100%	453 872	1%	100%
TOTAL	**3 751**	**100%**		**86 245 971**	**100%**	

Outside Europe						
Production year	**European film exports on release**	***% share***	***Cumulative % share***	**Admissions in non-national markets**	***% share***	***Cumulative % share***
2019	149	20%	20%	51 443 371	55%	55%
2018	280	38%	59%	29 579 198	32%	87%
2017	142	19%	78%	5 286 313	6%	92%
2016	30	4%	82%	1 568 565	2%	94%
2015	20	3%	85%	775 729	1%	95%
[2001-2014]	55	8%	93%	156 190	0%	95%
[1991-2000]	10	1%	94%	4520737	5%	100%
[1900-1990]	44	6%	100%	257 957	0%	100%
TOTAL	**730**	**100%**		**93 588 060**	**100%**	

Source: European Audiovisual Observatory / LUMIERE, Comscore.

4.5. Top 50 European film exports in 2019

Table 37. Short profiles of top 5 European film exports by admissions worldwide (2019)

Admissions refer to admissions generated in 2019

1

Downton Abbey (2019)
Country of origin: GB / US

Director: Michael Engler

Non-national admissions worldwide: 17.2 million

Non-national admissions in Europe: 4.7 million

Non-national release markets worldwide: 11

Genre: Drama, Romance

Language: English

Plot: The continuing story of the Crawley family, wealthy owners of a large estate in the English countryside in the early 20th century.

2

Yesterday (2019)
Country of origin: GB / US / RU / JP

Director: Danny Boyle

Non-national admissions worldwide: 15.5 million

Non-national admissions in Europe: 3.8 million

Non-national release markets worldwide: 46

Genre: Comedy, Fantasy, Music

Language: English

Plot: A struggling musician realizes he's the only person on Earth who can remember *The Beatles* after waking up in an alternate timeline where they never existed.

3

Cold Pursuit (2019)
Country of origin: GB / US / FR / CN / NO / CA

Director: Hans Petter Moland

Non-national admissions worldwide: 8.7 million

Non-national admissions in Europe: 2.2 million

Non-national release markets worldwide: 46

Genre: Action, Crime, Drama

Language: English

Plot: A grieving snowplow driver seeks out revenge against the drug dealers who killed his son.

4

The Favourite (2018)
Country of origin: GB[Inc] / US / IE

Director: Yorgos Lanthimos

Non-national admissions worldwide: 6.8 million

Non-national admissions in Europe: 3.5 million

Non-national release markets worldwide: 44

Genre: Biography, Comedy, Drama

Language: English

Plot: In early 18th century England, a frail Queen Anne occupies the throne and her close friend, Lady Sarah, governs the country in her stead. When a new servant, Abigail, arrives, her charm endears her to Sarah.

5

The Queen's Corgi (2019)
Country of origin: BE / US

Director: Vincent Kesteloot, Ben Stassen

Non-national admissions worldwide: 6.3 million

Non-national admissions in Europe: 4.8 million

Non-national release markets worldwide: 44

Genre: Animation, Comedy, Family

Language: English

Plot: The British monarch's (Dame Julie Walters') favorite dog gets lost from the palace and finds himself at a dog fight club. He then begins his long journey to find his way back home.

Source: European Audiovisual Observatory / LUMIERE, Comscore, IMDb

Table 38. Top 50 European films by non-national admissions worldwide (2019)

Estimated

N°	Film	Countries of origin	Prod. year	# of non-nat. rel. markets	Worldwide non-nat. adm. 2019	Non-nat. adm. 2019 in Europe	Adm. 2019 outside Europe
1	Downton Abbey	GB / US	2019	42	17 227 518	4 461 803	12 765 715
2	Yesterday	GB / US / RU / ..	2019	46	15 516 363	3 806 558	11 709 805
3	Cold Pursuit	GB / US / FR /…	2019	46	8 707 052	2 229 891	6 477 161
4	The Favourite	GB[Inc] / US / IE	2018	44	6 845 905	3 506 312	3 339 593
5	The Queen's Corgi	BE / US	2019	44	6 332 864	4 847 978	1 484 886
6	La leggenda del pianista sull'oceano	IT	1998	2	4 503 135		4 503 135
7	47 Meters Down: Uncaged	GB / US	2019	25	4 177 829	539 909	3 637 920
8	Mia et le lion blanc	FR / DE / ZA	2018	36	3 888 716	3 190 058	698 658
9	Dolor y gloria	ES / FR	2019	42	3 884 146	2 728 184	1 155 962
10	A Shaun the Sheep Movie: Farmageddon	GB / US / FR	2019	33	3 668 187	3 023 627	644 560
11	Durante la tormenta	ES	2018	1	3 390 918		3 390 918
12	Anna	FR / US	2019	38	3 150 684	1 635 294	1 515 390
13	Qu'est-ce qu'on a encore fait au bon Dieu?	FR	2018	25	3 106 872	3 106 872	
14	Dvizhenie vverkh	RU	2017	2	3 096 163		3 096 163
15	Judy	GB / US / FR	2019	22	3 051 083	167 648	2 883 435
16	Astérix: Le secret de la potion magique	FR / BE	2018	39	2 839 767	2 568 803	270 964
17	Greta	IE / US	2018	33	2 267 073	639 665	1 627 408
18	Skjelvet	NO	2018	11	1 877 060	73 417	1 803 643
19	They Shall Not Grow Old	GB / NZ	2018	22	1 684 553	177 814	1 506 739
20	Blinded by the Light	GB / US	2019	25	1 670 481	247 120	1 423 361
21	Stan & Ollie	GB / CA / US	2018	26	1 545 967	773 504	772 463
22	Snezhnaya koroleva. Zazerkale	RU	2018	18	1 495 738	423 888	1 071 850
23	Prooi	NL	2016	1	1 486 542		1 486 542
24	Red Joan	GB	2018	29	1 249 262	580 602	668 660
25	Zimna wojna	PL / FR / GB	2018	4	1 134 404	369 632	764 772
26	The White Crow	GB[Inc] / US / RS	2018	25	1 103 903	835 187	268 716
27	Minuscule - Les mandibules du bout …	FR / CN / CH	2018	26	1 088 873	541 540	547 333
28	The Wife	GB / SE / US	2017	25	1 075 185	657 464	417 721
29	Manou the Swift	DE	2019	26	1 056 266	595 560	460 706
30	Marnies Welt	BE / DE	2018	24	1 032 273	581 257	451 016
31	Everybody Knows	ES / FR / IT	2018	37	1 011 682	471 154	540 528
32	Rusalka. Ozero mertvykh	RU	2018	4	994 092		994 092
33	The Hole in the Ground	IE / BE / GB / FI	2019	2	991 141	311 347	679 794
34	The Aftermath	GB / US / DE	2019	25	936 217	474 820	461 397
35	The Professor and the Madman	IE / US / FR	2019	23	924 698	667 572	257 126
36	Sorry We Missed You	GB / FR / BE	2019	25	865 613	791 128	74 485
37	Kursk	FR / BE / LU /…	2018	27	835 004	372 953	462 051
38	Heilstätten	DE	2018	6	786 187	20 007	766 180
39	Heidi	DE / CH	2015	3	696 019	497	695 522
40	Colette	GB / US / HU	2018	32	686 162	516 446	169 716
41	Das perfekte Geheimnis	DE	2019	3	684 275	684 275	
42	Thomas & Friends: Big World! Big …	GB	2018	3	678 098	722	677 376
43	Werk ohne Autor	DE / IT	2018	23	664 502	458 035	206 467
44	The Mustang	FR / BE	2019	6	633 734	51 110	582 624
45	J'accuse	FR / IT	2019	8	616 904	616 904	
46	Kona fer í stríð	IS / FR / UA	2018	28	600 514	440 018	160 496
47	Le grand bain	FR	2018	27	591 755	477 805	113 950
48	Terra Willy: Planète inconnue	FR	2019	21	590 279	590 279	
49	Official Secrets	GB / US	2019	22	575 099	214 410	360 689
50	La Belle Époque	FR / BE	2019	18	516 740	498 797	17 943

Source: European Audiovisual Observatory / LUMIERE, Comscore

Table 39. Top 50 European films by non-national admissions in Europe (2019)

Estimated.

N°	Film	Countries of origin	Prod. year	# of European release markets	National admissions 2019	Non-national admissions 2019 in Europe	Total admissions 2019 in Europe
1	The Queen's Corgi	BE / US	2019	32	246 631	4 847 978	5 094 609
2	Downton Abbey	GB / US	2019	30	3 891 355	4 461 803	8 353 158
3	Yesterday	GB / US / RU /…	2019	32	1 908 053	3 806 558	5 714 611
4	The Favourite	GB[Inc] / US / IE	2018	31	2 343 761	3 506 312	5 850 073
5	Mia et le lion blanc	FR / DE / ZA	2018	26	1 494 801	3 190 058	4 684 859
6	Qu'est-ce qu'on a encore fait au bon Dieu?	FR	2018	25	6 714 809	3 106 872	9 821 681
7	A Shaun the Sheep Movie: Farmageddon	GB / US / FR	2019	29	960 052	3 023 627	3 983 679
8	Dolor y gloria	ES / FR	2019	31	932 893	2 728 184	3 661 077
9	Astérix: Le secret de la potion magique	FR / BE	2018	33		2 568 803	2 568 803
10	Cold Pursuit	GB / US / FR /…	2019	32	273 926	2 229 891	2 503 817
11	Anna	FR / US	2019	27	732 228	1 635 294	2 367 522
12	The White Crow	GB[Inc] / US /…	2018	20	172 512	835 187	1 007 699
13	Sorry We Missed You	GB / FR / BE	2019	22	174 993	791 128	966 121
14	Stan & Ollie	GB / CA / US	2018	22	1 459 538	773 504	2 233 042
15	Das perfekte Geheimnis	DE	2019	3	4 623 306	684 275	5 307 581
16	The Professor and the Madman	IE / US / FR	2019	14		667 572	667 572
17	The Wife	GB / SE / US	2017	16	5 556	657 464	663 020
18	Greta	IE / US	2018	21		639 665	639 665
19	J'accuse	FR / IT	2019	8	1 470 002	616 904	2 086 906
20	Manou the Swift	DE	2019	20	18 570	595 560	614 130
21	Terra Willy: Planète inconnue	FR	2019	21	121 245	590 279	711 524
22	Marnies Welt	BE / DE	2018	21	7 508	581 257	588 765
23	Red Joan	GB	2018	19	381 851	580 602	962 453
24	Minuscule - Les mandibules du bout du …	FR / CN / CH	2018	23	762 508	541 540	1 304 048
25	47 Meters Down: Uncaged	GB / US	2019	14		539 909	539 909
26	Colette	GB / US / HU	2018	22	345 923	516 446	862 369
27	Polaroid	NO / US	2019	12		503 009	503 009
28	Recep Ivedik 6	TR	2019	8	3 974 999	501 220	4 476 219
29	La Belle Époque	FR / BE	2019	15	1 232 065	498 797	1 730 862
30	Le grand bain	FR	2018	19		477 805	477 805
31	The Aftermath	GB / US / DE	2019	15	270 139	474 820	744 959
32	Everybody Knows	ES / FR / IT	2018	26	4 828	471 154	475 982
33	Werk ohne Autor	DE / IT	2018	18	26 481	458 035	484 516
34	Fireman Sam: Set for Action!	GB	2018	3		453 818	453 818
35	The Sisters Brothers	FR / ES / RO /…	2018	21		450 614	450 614
36	Unge Astrid	SE / DK	2018	14	4 597	441 197	445 794
37	Kona fer í stríð	IS / FR / UA	2018	23	155	440 018	440 173
38	The Death and Life of John F. Donovan	GB / CA	2018	8		437 825	437 825
39	Portrait de la jeune fille en feu	FR	2019	19	273 994	430 079	704 073
40	Snezhnaya koroleva. Zazerkale	RU	2018	14	832 776	423 888	1 256 664
41	Yuli	ES / CU / GB /…	2018	17	46 474	402 227	448 701
42	Il traditore	IT / FR / DE / BR	2019	15	771 270	401 778	1 173 048
43	Kursk	FR / BE / LU / …	2018	21		372 953	372 953
44	Zimna wojna	PL / FR / GB	2018	29		369 632	369 632
45	Ibiza	FR / BE	2019	12	637 062	368 339	1 005 401
46	Hodja fra Pjort	DK	2018	17		367 072	367 072
47	Aïlo: Une odyssée en Laponie	FR / FI	2018	20	156 055	362 223	518 278
48	Yedinci Kogustaki Mucize	TR	2019	5	5 310 542	361 851	5 672 393
49	Balloon	DE	2018	13	164 766	359 833	524 599
50	Doubles vies	FR	2018	23	164 688	351 701	516 389

Source: European Audiovisual Observatory / LUMIERE.

Table 40. Top 50 European films by admissions generated outside Europe (2019)

Estimated

N°	Film	Countries of origin	Prod. year	# of rel. markets	Adm. 2019 outside Europe	Adm. 2019 North America	Adm. 2019 Lat. America	Adm. 2019 Oceania	Adm. 2019 Asia
1	Downton Abbey	GB / US	2019	12	12 765 715	10 573 567	323 875	1 211 489	656 784
2	Yesterday	GB / US / …	2019	14	11 709 805	8 000 726	1 566 049	1 151 291	991 739
3	Cold Pursuit	GB / US / …	2019	14	6 477 161	3 508 610	2 255 128	215 674	497 749
4	La leggenda del pianista …	IT	1998	2	4 503 135				4 503 135
5	47 Meters Down: Uncaged	GB / US	2019	11	3 637 920	2 430 229	561 400	43 227	603 064
6	Durante la tormenta	ES	2018	1	3 390 918				3 390 918
7	The Favourite	GB[Inc] / US..	2018	13	3 339 593	1 839 469	730 558	336 855	432 711
8	Dvizhenie vverkh	RU	2017	2	3 096 163				3 096 163
9	Judy	GB / US / FR	2019	5	2 883 435	2 622 605	15 745	245 085	
10	Skjelvet	NO	2018	4	1 803 643		1 803 643		
11	Greta	IE / US	2018	12	1 627 408	1 151 125	322 458	106 387	47 438
12	Anna	FR / US	2019	11	1 515 390	845 392	412 478	11 035	246 485
13	They Shall Not Grow Old	GB / NZ	2018	9	1 506 739	1 337 671	8 420	15 754	144 894
14	Prooi	NL	2016	1	1 486 542				1 486 542
15	The Queen's Corgi	BE / US	2019	12	1 484 886	11 883	661 107	38 595	773 301
16	Blinded by the Light	GB / US	2019	11	1 423 361	1 299 252	31 774	87 551	4 784
17	Dolor y gloria	ES / FR	2019	11	1 155 962	418 824	689 256	38 142	9 740
18	Snezhnaya koroleva. Zaze…	RU	2018	4	1 071 850		127 643		944 207
19	Rusalka. Ozero mertvykh	RU	2018	4	994 092		994 092		
20	Stan & Ollie	GB / CA / US	2018	4	772 463	581 141		191 322	
21	Heilstätten	DE	2018	5	766 180		766 180		
22	Zimna wojna	PL / FR / GB	2018	11	764 772	480 207	174 809	73 779	35 977
23	Mia et le lion blanc	FR / DE / ZA	2018	10	698 658	43 723	644 380	3 298	7 257
24	Heidi	DE / CH	2015	1	695 522				695 522
25	The Hole in the Ground	IE / BE / …	2019	6	679 794	2 300	674 442	308	2 744
26	Thomas & Friends: Big World…	GB	2018	2	677 376				677 376
27	Red Joan	GB	2018	10	668 660	169 434	273 571	223 784	1 871
28	A Shaun the Sheep Movie: …	GB / US / FR	2019	4	644 560				644 560
29	The Mustang	FR / BE	2019	2	582 624	582 624			
30	Minuscule - Les mandibules…	FR / CN / CH	2018	3	547 333				547 333
31	Everybody Knows	ES / FR / IT	2018	11	540 528	292 336	163 371	41 563	43 258
32	Kursk	FR / BE / …	2018	6	462 051		292 127	1 262	168 662
33	The Aftermath	GB / US / DE	2019	10	461 397	176 692	103 611	169 510	11 584
34	Manou the Swift	DE	2019	6	460 706		300 257		160 449
35	Marnies Welt	BE / DE	2018	3	451 016		137 434		313 582
36	Pets United	DE / CN / GB	2019	1	440 157				440 157
37	The Wife	GB / SE / US	2017	9	417 721	151 482	184 767	2 996	78 476
38	The Silence	DE / US	2019	3	411 280				411 280
39	Final Score	GB	2018	3	391 751		391 751		
40	Maiden	GB	2018	4	366 805	345 603		21 202	
41	Pikovaya dama. Zazerkalye	RU	2019	4	363 368		363 368		
42	Official Secrets	GB / US	2019	10	360 689	217 328	60 520	50 789	32 052
43	Drôles de petites bêtes	FR / LU	2017	3	289 590	24			289 566
44	Astérix: Le secret de la potion...	FR / BE	2018	6	270 964	185 639	49 390	23 503	12 432
45	The White Crow	GB[Inc] / US/...	2018	5	268 716	199 648		58 112	10 956
46	Vykradena pryntsesa: Ruslan i...	UA	2018	1	266 463				266 463
47	The Professor and the Madman	IE / US / FR	2019	9	257 126		204 425	743	51 958
48	Otryv	RU	2019	2	250 649		250 649		
49	Wild Rose	GB / US / CA	2018	8	244 909	178 507	3 555	46 835	16 012
50	Kak ya stal russkim	RU / CN	2019	1	236 549				236 549

Source: European Audiovisual Observatory / LUMIERE, Comscore.

5. APPENDIX

5.1. Number of films tracked in LUMIERE

Table 41. Number of films tracked in LUMIERE database by territory (2015-2019)

Figures refer to data available at the time of the analysis

		Territory	2015	2016	2017	2018	2019
EUROPE							
1	**AT**	Austria	430	457	463	481	486
2	**BA**	Bosnia-Herzegovina	-	218	234	223	239
3	**BE**	Belgium	20	888	922	899	857
4	**BG**	Bulgaria	311	330	344	288	278
5	**CH**	Switzerland	1 642	1 833	1 894	2 038	2 031
6	**CY**	Cyprus		141	139	140	132
7	**CZ**	Czech Republic	1 155	1 245	1 210	1 263	1 376
8	**DE**	Germany	2 430	2 355	2 360	2 388	2 458
9	**DK**	Denmark	263	281	284	272	251
10	**EE**	Estonia	375	376	356	402	313
11	**ES**	Spain	544	692	1 848	1 829	1 773
12	**FI**	Finland	326	328	361	385	482
13	**FR**	France	822	838	804	857	836
14	**GB**	United Kingdom & Ireland	2 444	2 611	2 589	2 569	918
15	**GE**	Georgia	-	183	-	-	-
16	**GR**	Greece	309	320	336	365	330
17	**HR**	Croatia	220	208	206	209	201
18	**HU**	Hungary	549	610	715	720	813
19	**IS**	Iceland	191	199	196	196	218
20	**IT**	Italy	1 224	1 349	1 581	1 725	1 858
21	**LT**	Lithuania	290	288	303	352	378
22	**LU**	Luxembourg	-	-	456	492	543
23	**LV**	Latvia	227	302	292	344	319
24	**ME**	Montenegro	-	161	18	250	261
25	**MK**	North Macedonia	-	-	-	278	491
26	**NL**	Netherlands	458	608	1 130	1 240	1 276
27	**NO**	Norway	590	585	657	791	1 247
28	**PL**	Poland	472	495	500	579	335
29	**PT**	Portugal	1 029	856	973	948	1 003
30	**RO**	Romania	406	447	387	437	430
31	**RU**	Russian Federation	585	604	659	1 080	820
32	**SE**	Sweden	873	853	13	13	607
33	**SI**	Slovenia	505	473	474	493	463
34	**SK**	Slovak Republic	596	100	716	798	735
35	**TR**	Turkey	522	525	530	636	623
OUTSIDE OF EUROPE							
1	**AR**	Argentina	511	535	537	537	525
2	**AU**	Australia	570	615	685	959	927
3	**BR**	Brazil	615	659	623	575	583
4	**CA**	Canada	525	483	459	565	605
5	**CL**	Chile	271	250	244	288	244
6	**CN**	China	641	888	938	937	910
7	**CO**	Colombia	374	424	382	443	409
8	**HK**	Hong Kong	-	-	281	300	298
9	**JP**	Japan	-	-	334	347	316
10	**KR**	South Korea	501	482	500	565	601
11	**MX**	Mexico	574	572	563	645	628
12	**NZ**	New Zealand	348	405	425	502	588
13	**SG**	Singapore	-	-	279	339	332
14	**US**	United States of America	822	824	838	817	826
15	**VE**	Venezuela	265	254	182	111	-

Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.2. Admissions tracked in LUMIERE

Table 42. Admissions tracked in LUMIERE database by territory (2015-2019)

Figures refer to data available at the time of the analysis

Territory			2015	2016	2017	2018	2019
EUROPE							
1	**AT**	Austria	15 921 536	15 128 983	14 550 087	12 933 262	13 676 348
2	**BA**	Bosnia-Herzegovina	-	919 016	1 082 708	1 128 431	1 293 760
3	**BE**	Belgium	10 255 617	19 010 390	18 903 923	18 138 970	17 764 505
4	**BG**	Bulgaria	5 333 310	5 532 490	5 572 474	4 900 067	5 015 339
5	**CH**	Switzerland	14 289 522	13 315 203	13 414 952	11 583 249	12 327 558
6	**CY**	Cyprus	-	698 684	743 644	753 517	842 038
7	**CZ**	Czech Republic	12 869 201	15 523 524	15 119 465	16 243 588	18 133 375
8	**DE**	Germany	135 034 078	122 182 099	118 408 370	104 711 030	115 614 028
9	**DK**	Denmark	14 199 726	13 455 995	12 502 040	12 998 814	13 239 287
10	**EE**	Estonia	3 087 663	3 290 725	3 510 932	3 629 740	3 537 596
11	**ES**	Spain	95 765 785	101 576 276	108 038 412	98 259 993	103 539 957
12	**FI**	Finland	8 722 707	8 681 351	8 829 484	8 098 848	8 394 354
13	**FR**	France	186 574 908	187 919 256	188 399 185	174 340 951	196 417 433
14	**GB**	United Kingdom & Ireland	179 037 879	177 401 669	180 461 705	173 552 269	180 251 706
15	**GE**	Georgia	-	1 096 437	-	-	-
16	**GR**	Greece	9 806 141	10 024 974	10 114 133	9 373 992	9 566 384
17	**HR**	Croatia	3 933 141	4 294 781	4 540 431	4 607 068	4 912 282
18	**HU**	Hungary	13 016 165	14 620 630	14 912 084	15 443 104	15 065 571
19	**IS**	Iceland	1 379 344	1 420 503	1 373 178	1 428 054	1 240 828
20	**IT**	Italy	99 117 894	104 990 313	92 042 679	85 661 926	97 451 769
21	**LT**	Lithuania	3 330 451	3 667 730	4 055 676	4 271 154	4 137 336
22	**LU**	Luxembourg	-	-	1 144 061	1 043 510	1 133 671
23	**LV**	Latvia	2 285 360	2 512 734	2 474 997	2 523 103	2 722 882
24	**ME**	Montenegro	-	241 525	108 083	276 462	304 600
25	**MK**	North Macedonia	-	-	-	400 941	499 988
26	**NL**	Netherlands	30 133 323	33 456 879	37 011 664	36 675 040	38 896 867
27	**NO**	Norway	11 899 233	12 954 522	11 555 388	12 034 049	11 165 961
28	**PL**	Poland	44 514 018	51 971 706	56 348 449	59 560 849	58 468 409
29	**PT**	Portugal	14 540 401	14 886 395	15 584 737	14 734 727	15 494 272
30	**RO**	Romania	11 114 776	12 980 911	13 813 823	13 282 747	13 050 601
31	**RU**	Russian Federation	190 521 814	212 460 403	212 271 507	200 066 205	216 476 668
32	**SE**	Sweden	16 893 564	17 641 019	5 978 262	5 861 002	15 612 110
33	**SI**	Slovenia	1 984 048	2 295 466	2 291 170	2 473 195	2 292 490
34	**SK**	Slovak Republic	4 605 732	4 891 758	6 689 819	5 948 078	6 455 395
35	**TR**	Turkey	60 355 895	58 293 647	71 154 142	69 909 410	58 170 503
OUTSIDE EUROPE							
1	**AR**	Argentina	50 046 931	47 737 553	46 903 607	43 787 589	46 218 900
2	**AU**	Australia	87 764 933	83 925 955	77 261 415	85 285 083	81 179 654
3	**BR**	Brazil	168 240 717	179 247 047	176 593 359	160 604 467	173 534 477
4	**CA**	Canada	118 378 942	115 934 025	108 626 988	109 269 099	110 368 454
5	**CL**	Chile	25 891 233	27 051 643	26 693 208	27 782 355	28 973 779
6	**CN**	China	1 214 104 427	1 313 953 414	1 512 092 793	1 677 896 054	1 699 660 508
7	**CO**	Colombia	58 645 603	59 665 569	60 833 559	63 540 885	72 581 715
8	**HK**	Hong Kong	-	-	22 597 173	23 793 464	23 467 991
9	**JP**	Japan	-	-	159 212 151	156 808 825	176 231 304
10	**KR**	South Korea	214 328 941	206 470 116	210 091 491	212 154 521	229 462 599
11	**MX**	Mexico	294 310 563	328 190 759	339 126 247	330 779 467	348 596 217
12	**NZ**	New Zealand	13 809 824	14 947 926	14 616 730	16 316 464	14 659 570
13	**SG**	Singapore	-	-	18 889 090	18 353 218	18 269 539
14	**US**	United States of America	1 196 731 747	1 193 534 696	1 096 498 386	1 181 685 558	1 124 565 563
15	**VE**	Venezuela	28 910 680	18 784 329	20 340 564	9 963 229	-

Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.3. Estimated LUMIERE coverage rates

Table 43. Estimated LUMIERE coverage rate of admissions in individual territories (2015-2019)

Figures refer to data available at the time of the analysis

Territory			2015	2016	2017	2018	2019
EUROPE							
1	**AT**	Austria	100%	100%	100%	100%	100%
2	**BA**	Bosnia-Herzegovina	-	100%	100%	97%	100%
3	**BE**	Belgium	48%	98%	97%	97%	89%
4	**BG**	Bulgaria	100%	100%	100%	100%	100%
5	**CH**	Switzerland	99%	99%	99%	99%	99%
6	**CY**	Cyprus	-	100%	100%	100%	100%
7	**CZ**	Czech Republic	99%	99%	99%	99%	99%
8	**DE**	Germany	97%	100%	97%	99%	97%
9	**DK**	Denmark	100%	100%	100%	100%	100%
10	**EE**	Estonia	100%	100%	100%	100%	96%
11	**ES**	Spain	100%	100%	100%	99%	99%
12	**FI**	Finland	100%	100%	100%	100%	100%
13	**FR**	France	91%	88%	90%	87%	92%
14	**GB**	United Kingdom & Ireland	96%	96%	96%	90%	94%
15	**GE**	Georgia	-	95%	-	-	-
16	**GR**	Greece	100%	100%	100%	100%	100%
17	**HR**	Croatia	100%	100%	100%	100%	100%
18	**HU**	Hungary	100%	100%	98%	100%	99%
19	**IS**	Iceland	100%	100%	100%	99%	98%
20	**IT**	Italy	93%	92%	92%	93%	93%
21	**LT**	Lithuania	100%	100%	100%	100%	100%
22	**LU**	Luxembourg	-	-	97%	99%	99%
23	**LV**	Latvia	96%	100%	100%	100%	100%
24	**ME**	Montenegro	-	77%	37%	99%	99%
25	**MK**	North Macedonia	-	-	-	86%	93%
26	**NL**	Netherlands	91%	98%	100%	100%	100%
27	**NO**	Norway	99%	99%	98%	99%	99%
28	**PL**	Poland	100%	100%	100%	100%	96%
29	**PT**	Portugal	100%	100%	100%	100%	100%
30	**RO**	Romania	100%	100%	100%	100%	91%
31	**RU**	Russian Federation	100%	100%	100%	100%	99%
32	**SE**	Sweden	99%	99%	35%	36%	98%
33	**SI**	Slovenia	94%	98%	97%	97%	95%
34	**SK**	Slovak Republic	100%	86%	100%	100%	99%
35	**TR**	Turkey	99%	100%	100%	99%	98%
OUTSIDE EUROPE							
1	**AR**	Argentina	96%	94%	95%	94%	95%
2	**AU**	Australia	97%	92%	91%	95%	96%
3	**BR**	Brazil	97%	97%	97%	99%	98%
4	**CA**	Canada	100%	100%	97%	99%	99%
5	**CL**	Chile	100%	99%	97%	100%	99%
6	**CN**	China	96%	96%	93%	98%	98%
7	**CO**	Colombia	99%	97%	97%	99%	99%
8	**HK**	Hong Kong	-	-	93%	97%	96%
9	**JP**	Japan	-	-	88%	90%	100%
10	**KR**	South Korea	99%	95%	96%	98%	100%
11	**MX**	Mexico	100%	100%	100%	100%	100%
12	**NZ**	New Zealand	89%	93%	93%	98%	91%
13	**SG**	Singapore	-	-	97%	94%	99%
14	**US**	United States of America	100%	100%	97%	99%	99%
15	**VE**	Venezuela	97%	98%	89%	63%	-

Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.4. Treatment of "EUR INC" films

As mentioned in the methodological remarks in chapter 1, European films financed with incoming US investment ("EUR INC" films) are by default not counted as European but rather as 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 EACEA film database (https://eacea.ec.europa.eu/mediaPgm/tabsMenu.do) and / or in Europa Cinema's film database (https://www.europa-cinemas.org/en/search-film). Please note that the 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 fewer films as GB or GB INC films than the BFI counts UK films.

Table 44. EUR INC films considered European films in this report (2015-2019)

Rank	Original title	Prod. country	Prod. year	Director(s)	Non-nat. admissions worldwide 2015-2019
1	The Favourite	GB INC / US / IE	2018	Yorgos Lanthimos	8 970 286
2	The Theory of Everything	GB INC / US	2014	James Marsh	7 662 049
3	The Woman in Black 2: Angel of Death	GB INC / US / CA	2014	Tom Harper	6 809 368
4	The Snowman	GB INC / US / SE	2017	Tomas Alfredson	4 603 578
5	Eddie the Eagle	GB INC / US / DE	2016	Dexter Fletcher	3 972 798
6	Bastille Day	GB INC / FR / US	2016	James Watkins	1 784 523
7	Absolutely Fabulous: The Movie	GB INC / US	2016	Mandie Fletcher	1 592 699
8	Genius	GB INC / US	2016	Michael Grandage	1 287 651
9	You Were Never Really Here	GB INC / FR / US	2017	Lynne Ramsay	1 259 750
10	Tulip Fever	GB INC / US	2017	Justin Chadwick	1 168 843
11	The White Crow	GB INC / US / RS	2018	Ralph Fiennes	1 104 072
12	Goodbye Christopher Robin	GB INC / US	2017	Simon Curtis	1 060 463
13	Denial	GB INC / US	2016	Mick Jackson	986 518
14	Unlocked	GB INC / US / CZ / CH	2017	Michael Apted	826 821
15	Absolutely Anything	GB INC / US	2015	Terry Jones	805 015
16	My Cousin Rachel	GB INC / US	2017	Roger Michell	683 816
17	Rush	GB INC / US / DE	2013	Ron Howard	668 903
18	A Quiet Passion	GB INC / BE / US	2016	Terence Davies	528 631
19	Final Portrait	GB INC / US	2017	Stanley Tucci	270 766
20	Dancer	GB INC / US	2016	Steven Cantor	209 172
21	The Journey	GB INC / US	2016	Nick Hamm	160 902
22	Tommy's Honour	GB INC / US	2016	Jason Connery	78 781
23	David Brent: Life on the Road	GB INC / US	2016	Ricky Gervais	75 098
24	The Childhood of a Leader	GB INC / US / FR / HU / BE / SE	2015	Brady Corbet	19 844
25	Under the Skin	GB INC / US / CH	2013	Jonathan Glazer	14 777
26	Locke	GB INC / US	2013	Steven Knight	8 837
27	The Woman in Black	GB INC / US / SE	2012	James Watkins	4 476
28	The Quiet Ones	GB INC / US	2014	John Pogue	4 421
29	The King's Speech	GB INC / US	2010	Tom Hooper	3 180
30	Seven Psychopaths	GB INC / US	2012	Martin McDonagh	1 497
31	Hysteria	GB INC / US / FR / DE / LU	2011	Tanya Wexler	1 033
32	Take Down	GB INC / US	2016	Jim Gillespie	636
33	London Town	GB INC / US	2016	Derrick Borte	526
34	Hyde Park on Hudson	GB INC / US	2012	Roger Michell	241
35	Redemption	GB INC / US	2013	Steven Knight	216
36	Coriolanus	GB INC / US / RS	2011	Ralph Fiennes	38
37	As You Like It	GB INC / US	2006	Kenneth Branagh	8
38	The Numbers Station	GB INC / US / BE	2013	Kasper Barfoed	3

Source: European Audiovisual Observatory / LUMIERE, Comscore.

For reference purposes, the following films which are classified as GB INC films in LUMIERE were considered US films in the context of this analysis:

Table 45. Top 50 EUR INC films considered US films in this report (2015-2019)

Rank	Original title	Prod. country	Prod. year	Director(s)	Non-nat. admissions worldwide 2015-2019
1	Bohemian Rhapsody	GB INC / US	2018	Bryan Singer	103 526 196
2	Fantastic Beasts and Where to Find Them	GB INC / US	2016	David Yates	87 539 025
3	Spectre	GB INC / US	2015	Sam Mendes	84 034 628
4	Fantastic Beasts: The Crimes of Grindelwald	GB INC / US	2018	David Yates	76 394 420
5	Dunkirk	GB INC / US / FR / NL	2017	Christopher Nolan	53 786 269
6	Kingsman: The Secret Service	GB INC / US	2014	Matthew Vaughn	48 002 264
7	Kingsman: The Golden Circle	GB INC / US	2017	Matthew Vaughn	45 427 292
8	Baby Driver	GB INC / US	2017	Edgar Wright	25 578 220
9	The Foreigner	GB INC / US / CN	2017	Martin Campbell	19 469 447
10	Rocketman	GB INC / US	2019	Dexter Fletcher	18 244 745
11	Three Billboards Outside Ebbing, Missouri	GB INC / US	2017	Martin McDonagh	17 877 415
12	The Second Best Exotic Marigold Hotel	GB INC / US	2015	John Madden	7 025 874
13	Woman in Gold	GB INC / US	2015	Simon Curtis	6 742 924
14	Mary Queen of Scots	GB INC / US	2018	Josie Rourke	4 103 029
15	Cats	GB INC / US	2019	Tom Hooper	4 054 206
16	Ex Machina	GB INC / US	2015	Alex Garland	4 038 151
17	Fighting with My Family	GB INC / US	2019	Stephen Merchant	3 293 427
18	The Kid Who Would Be King	GB INC / US	2019	Joe Cornish	3 227 110
19	Mr. Holmes	GB INC / US	2015	Bill Condon	3 031 930
20	The Infiltrator	GB INC / US	2016	Brad Furman	2 701 224
21	Grimsby	GB INC / US	2016	Louis Leterrier	2 678 814
22	Far from the Madding Crowd	GB INC / US	2015	Thomas Vinterberg	2 482 878
23	Legend	GB INC / US / FR	2015	Brian Helgeland	2 229 353
24	The Autopsy of Jane Doe	GB INC / US	2016	André Øvredal	1 757 621
25	Black Sea	GB INC / US / RU	2014	Kevin Macdonald	575 643
26	Before I Go to Sleep	GB INC / US / FR / SE	2014	Rowan Joffe	351 091
27	Harry Potter and the Philosopher's Stone	GB INC / US	2001	Chris Columbus	346 452
28	Robin Hood	GB INC / US	2010	Ridley Scott	345 057
29	We Are X	GB INC / US	2016	Stephen Kijak	237 535
30	The Exception	GB INC / US / DE / BE	2016	David Leveaux	88 459
31	Una	GB INC / US / CA	2016	Benedict Andrews	72 237
32	Harry Potter and the Deathly Hallows: Part 2	GB INC / US	2011	David Yates	55 746
33	Harry Potter and the Chamber of Secrets	GB INC / US	2002	Chris Columbus	49 764
34	Harry Potter and the Goblet of Fire	GB INC / US	2005	Mike Newell	49 462
35	Harry Potter and the Prisoner of Azkaban	GB INC / US	2004	Alfonso Cuarón	47 950
36	Harry Potter and the Deathly Hallows: Part 1	GB INC / US	2010	David Yates	47 646
37	Harry Potter and the Half-Blood Prince	GB INC / US	2008	David Yates	47 608
38	Harry Potter and the Order of the Phoenix	GB INC / US	2007	David Yates	45 459
39	Skyfall	GB INC / US	2012	Sam Mendes	5 411
40	The Best Exotic Marigold Hotel	GB INC / US / UA	2011	John Madden	4 670
41	RocknRolla	GB INC / US / FR	2008	Guy Ritchie	4 615
42	In Bruges	GB INC / US	2008	Martin McDonagh	3 715
43	Chocolat	GB INC / US	2000	Lasse Hallström	3 432
44	Gnomeo and Juliet	GB INC / US	2011	Kelly Asbury	3 141
45	Wallace & Gromit in The Curse of the Were-Rabbit	GB INC / US	2005	Nick Park, Steve Box	2 825
46	Arthur Christmas	GB INC / US	2011	Barry Cook, Sarah Smi	2 298
47	One Chance	GB INC / US	2013	David Frankel	1 896
48	The Hours	GB INC / US	2002	Stephen Daldry	1 023
49	Chicken Run	GB INC / US	2000	Nick Park, Peter Lord	1 016
50	Match Point	GB INC / US / LU	2005	Woody Allen	974

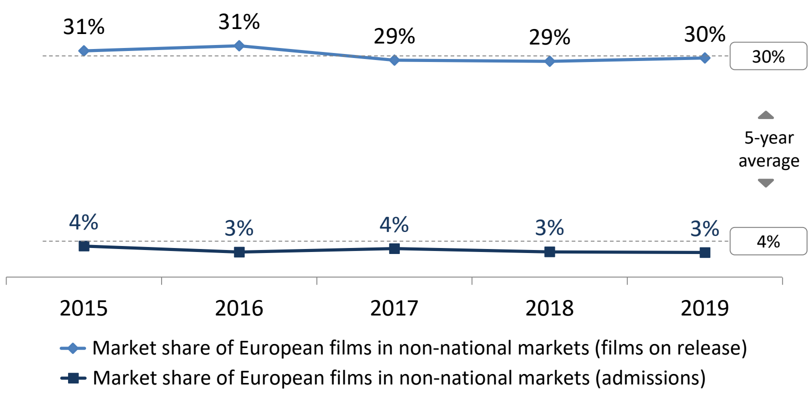
Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.5. Market share of European film exports

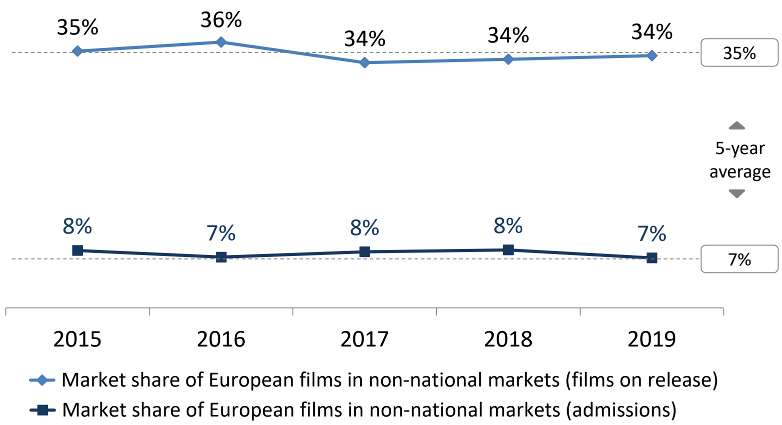
Figure 18. Market share of non-national European films (2015-2019)

Estimated percentage share of number of films on release, as tracked in LUMIERE

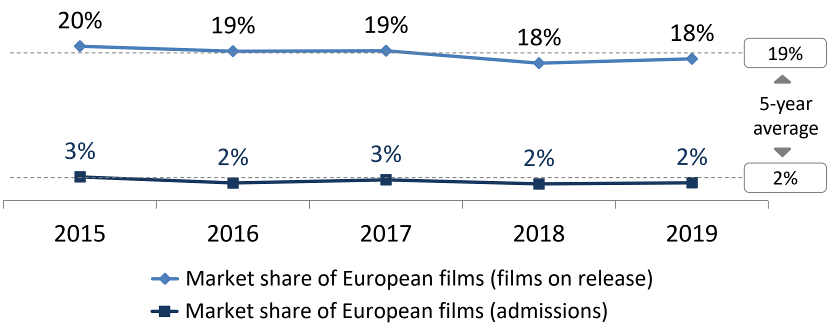
Worldwide



Europe



Outside Europe



Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.6. Market share by region and country of origin of films on release (2019)

A breakdown of European market share by films originating from individual European countries is shown in Tables 46 and 47.

Table 46. Market share by region / country of origin of films on release in Europe (2019)

Market share in terms of admissions; Estimated; Markets ranked by market share of non-national European films

Market	North American films	Latin American films	Asian films	Other films	National European	Non-nat. European films	GB	FR	BE	DE	ES	IE	Other
ME	74%	0%	1%	0%	0%	25%	8%	8%	4%	4%	3%	2%	71%
CH	67%	0%	2%	0%	7%	24%	19%	48%	2%	21%	3%	1%	5%
AT	73%	0%	1%	0%	2%	23%	15%	19%	2%	53%	1%	1%	7%
BA	80%	0%	1%	0%	0%	19%	11%	9%	4%	4%	1%	1%	69%
GR	75%	0%	2%	0%	5%	17%	35%	36%	4%	2%	8%	5%	8%
LU	79%	0%	2%	0%	2%	17%	21%	41%	5%	23%	3%	1%	5%
SK	70%	0%	2%	0%	13%	16%	11%	21%	4%	4%	2%	0%	58%
EE	62%	0%	2%	0%	20%	15%	22%	10%	9%	4%	2%	1%	49%
BE	76%	0%	1%	0%	8%	15%	20%	67%	0%	4%	2%	0%	6%
SI	79%	0%	1%	0%	6%	14%	19%	22%	11%	10%	4%	0%	31%
NL	72%	0%	2%	0%	12%	13%	42%	14%	15%	6%	4%	1%	17%
LT	64%	0%	3%	1%	19%	13%	14%	23%	9%	6%	2%	2%	39%
MK	81%	0%	0%	0%	7%	11%	8%	12%	5%	6%	7%	0%	59%
LV	66%	0%	2%	0%	20%	11%	16%	11%	11%	2%	2%	1%	55%
FI	72%	0%	0%	0%	16%	11%	56%	18%	6%	3%	7%	1%	9%

Table 47. Market share by region / country of origin of films on release outside Europe (2019)

Market share in terms of admissions; Estimated; Markets ranked by market share of European films

Market	North American films	Latin American films	Asian films	Other films	European films	GB	FR	RU	ES	IT	DE	IE	Other
NZ	81%	0%	7%	3%	8%	83%	3%	0%	2%	0%	3%	0%	8%
AU	86%	0%	5%	3%	6%	83%	4%	2%	2%	0%	4%	0%	6%
CO	88%	4%	3%	0%	5%	30%	21%	1%	5%	17%	3%	0%	23%
CA	91%	0%	5%	0%	4%	81%	11%	0%	2%	0%	1%	0%	5%
HK	71%	0%	26%	0%	3%	66%	24%	2%	1%	1%	1%	0%	4%
MX	86%	8%	3%	0%	3%	32%	14%	1%	8%	9%	8%	0%	28%
US	94%	0%	2%	0%	3%	87%	4%	0%	2%	0%	1%	0%	6%
AR	86%	9%	3%	0%	3%	41%	13%	6%	21%	4%	6%	0%	9%
BR	83%	13%	2%	0%	2%	44%	13%	2%	9%	10%	7%	0%	15%
CL	92%	1%	5%	0%	2%	43%	9%	2%	5%	3%	10%	0%	29%
SG	81%	0%	17%	0%	2%	75%	16%	0%	1%	0%	1%	0%	7%
KR	45%	0%	54%	0%	1%	45%	19%	2%	2%	12%	5%	0%	15%
CN	30%	0%	69%	0%	1%	10%	6%	22%	17%	21%	11%	7%	7%
JP	44%	0%	55%	0%	1%	46%	35%	0%	2%	1%	0%	0%	15%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

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