The circulation of European films outside Europe

- Key figures 2016

LUMIERE

A publication
of the European Audiovisual Observatory

European Audiovisual Observatory

COUNCIL OF EUROPE
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The circulation of European films outside Europe
Key figures 2016

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Acknowledgements
The Audiovisual Observatory would like to thank the EFARN network and all of our contacts in organisations across Europe who regularly provide us with the necessary data to keep our LUMIERE database up-to-date.

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Martin Kanzler

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1. EXECUTIVE SUMMARY

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

Theatrical market volume of European films outside Europe in 2016

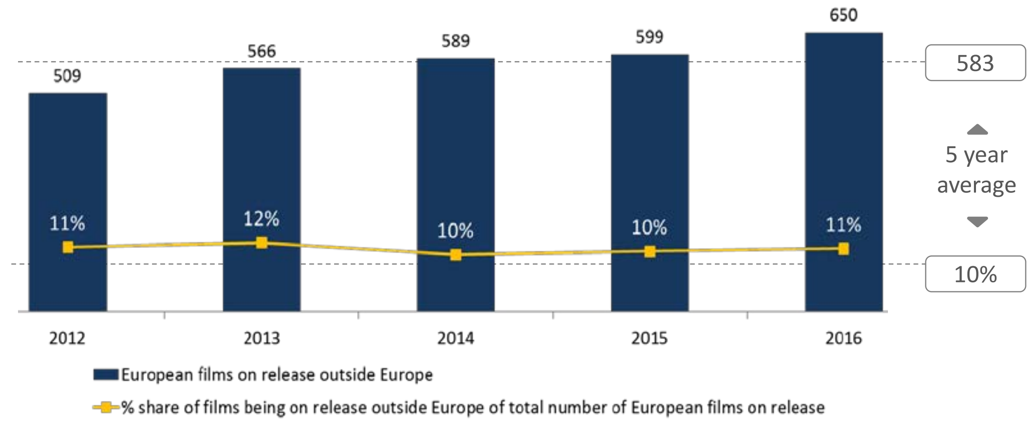
An estimated total of 650 European films were on theatrical release in at least one of the 12 non-European markets covered in this report. This is the largest number of European films released outside Europe in the past five years and represents about 11% of the total number of European films on release worldwide (see Figure 1 below).

These 650 films cumulatively generated about 82 million admissions outside Europe. This is in line with admission levels observed in 2013 and 2014 but below the five year average of EUR 97 million (see Figure 2 overleaf). Applying local average ticket prices this corresponds with an estimated EUR 475 million in gross box office earned by European films outside Europe in 2016.

European films accounted for 19% of the tracked number of films on release (in line with the 5 year average) and 2% of the admissions generated in the 12 non-European sample markets. This is the lowest market share in the past five years (average 3%).

Figure 1. European films on release outside Europe in 2012-2016

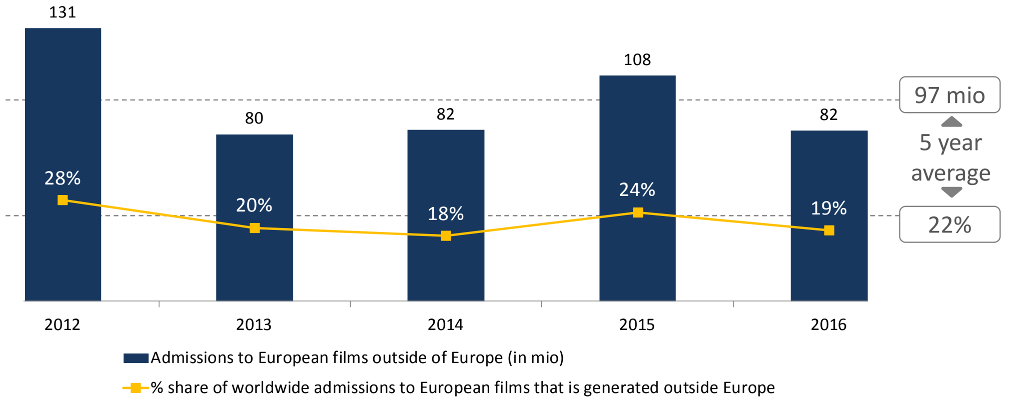
Estimated. As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, comScore

Figure 2. Admissions to European films outside Europe 2012-2016 (in million)

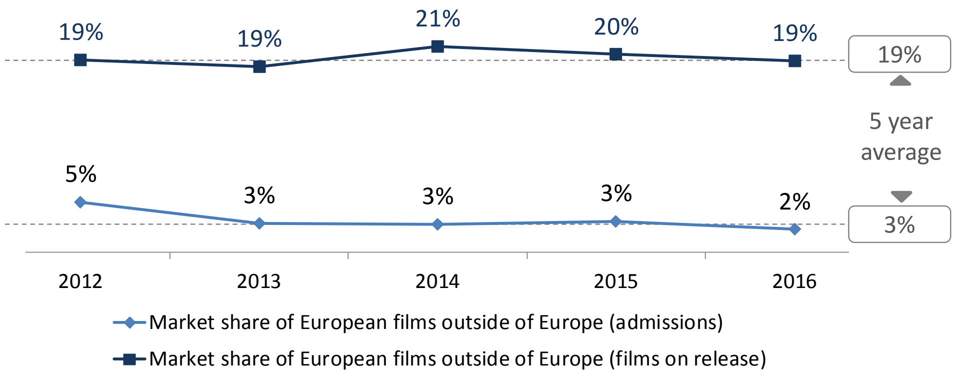
As tracked in LUMIERE. Pro-forma estimates for China for 2012 and 2013.



Source: European Audiovisual Observatory / LUMIERE, comScore, Oanda

Figure 3. Market shares of European films outside Europe 2012-2016

Estimated. As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, comScore

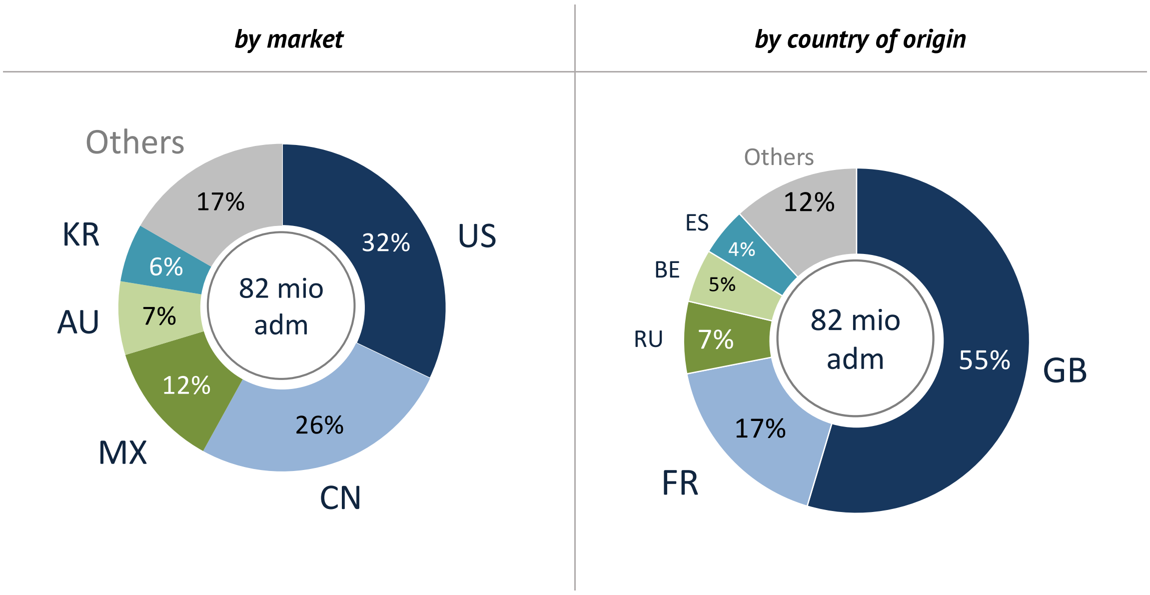
North America is the largest market for European films outside Europe

The North American market maintained its position as the most important “overseas” market for European films in terms of admissions. In 2016 an estimated 29.8 and 2.7 million tickets were sold to European films in the US and Canada respectively. The US market hence represents the single largest market for European films, accounting for 32% of total admissions to European films outside Europe, while the Canadian market accounted for 4%.

Despite the very limited number of European releases, China clearly came in as the second largest market for European films in terms of admissions with 18.6 million tickets sold in 2016, accounting for 23% of total admission, followed by Mexico (12%), Australia (7%) and South Korea (6%).

Figure 4. Admissions to European films outside Europe 2016 – by market and origin

Estimated. As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, comScore

French and UK films cumulatively accounted for 72% of admissions to European films in 2016

Admissions to European films were rather concentrated with UK and FR films cumulatively accounting for 72% of total admissions to European films outside Europe in 2016.

The UK overtook France as the most successful European film export country in 2016 with UK films cumulatively selling 44.6 million tickets accounting for 55% of total admissions. French films came in second place, with 14.1 million admissions (17% of total admissions to European films). Russian films followed at a distance, cumulatively selling 5.5 million tickets outside Europe in 2016 (7%) ahead of Belgian films (4.1 million) and Spanish films (3.7 million).

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

Nine Lives (FR/CN/CA) was most successful European film outside Europe selling 7.2 mio tickets

Europacorp's English language family comedy *Nine Lives* (FR/CN/CA) was released in nine out of the 12 non-European markets tracked and sold 7.2 million tickets outside Europe in 2016, thus accounting for 9% of total admissions to European films outside Europe. This is a comparatively poor performance when compared to top films in other years: In 2014 *Lucy* (FR) sold 31.9 million tickets and accounted for 39% of cumulative admissions to European films outside Europe and *Taken 3* (FR) sold 25.6million admissions in 2015, accounting for 24%. *Bridget Jones's Baby* (GB/US/FR) ranked second with 6.4 million admissions ahead of BBC's Christmas special episode of *Sherlock: The*

Abominable Bride (GB) which was released in theatres in 4 non-European territories and sold 5.6 million tickets. These three films were the only European films to sell more than 5 million tickets outside Europe, in contrast to 2015 when six films managed to do so.

SYNTHÈSE

Le présent rapport porte sur l'exploitation en salles des films européens hors d'Europe. 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 VOD peuvent également présenter un réel potentiel pour les films européens. Toutefois, ils ne peuvent pas être quantifiés en raison de l'opacité des données de consommation pertinentes.

Volume du marché des salles pour les films européens hors d'Europe en 2016

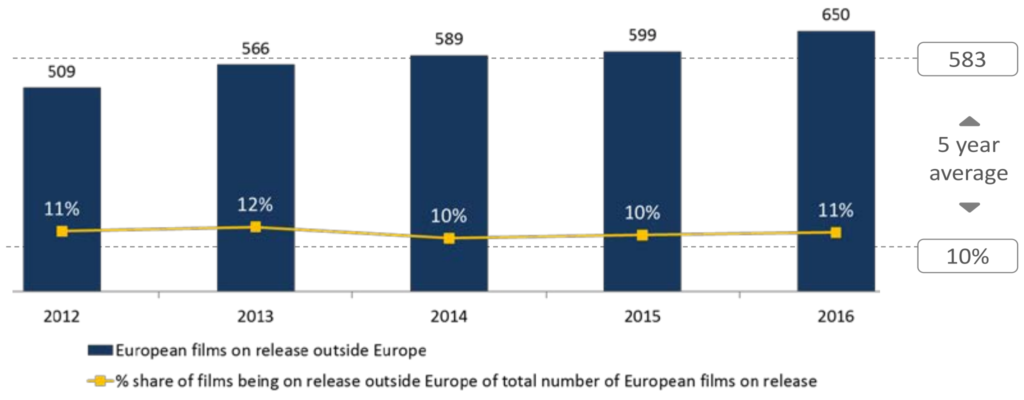
Il est estimé qu'un total de 650 films européens est sorti en salles sur au moins l'un des 12 marchés non européens couverts par le présent rapport. Il s'agit du plus grand nombre de films européens sortis en salles hors d'Europe des cinq dernières années et cela représente environ 11% du nombre total de films européens sortis en salles au niveau mondial (voir graphique 1).

Ces 650 films ont cumulativement généré quelque 82 millions d'entrées en salles hors d'Europe. Ce résultat est conforme aux niveaux observés en 2013 et en 2014 mais inférieur à la moyenne sur cinq ans qui s'établit à 97 millions d'entrées (voir graphique 2). En appliquant le prix moyen du billet local, il est estimé que les films européens ont généré 475 millions d'EUR de recettes brutes au guichet hors d'Europe en 2016.

Les films européens représentent 19 % du nombre de films sortis en salles suivis (chiffre conforme à la moyenne sur 5 ans) et 2 % des entrées en salles générées sur les 12 marchés non européens de l'échantillon (voir graphique 3). Il s'agit de leur deuxième plus faible part de marché des cinq dernières années (moyenne 3 %).

Graphique 1. Films européens sortis en salles hors d'Europe, 2012-2016

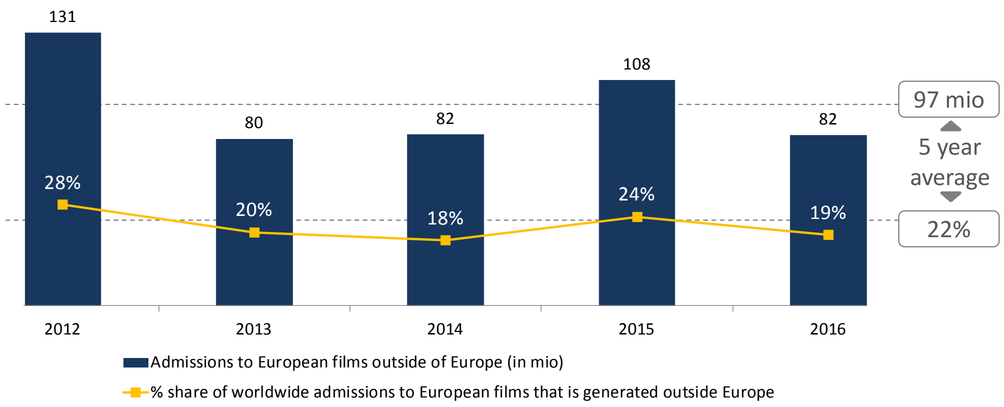
Estimation. Selon LUMIERE.



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

Graphique 2. Entrées en salles des films européens hors d'Europe, 2012-2016 (en millions)

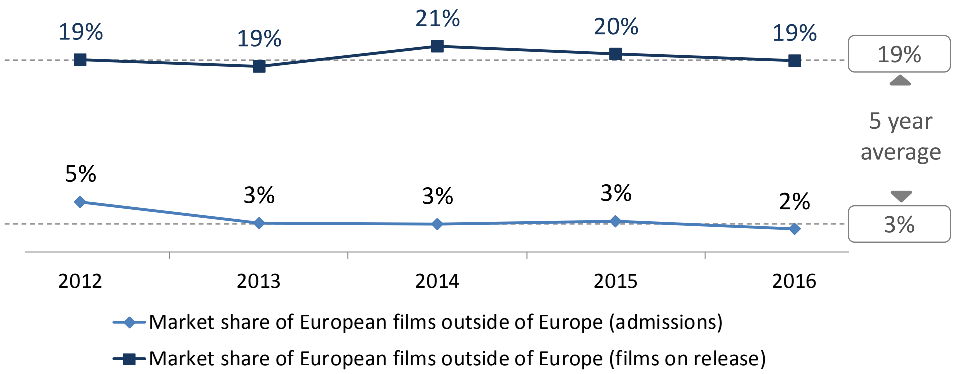
Selon LUMIERE. Estimations pro forma pour la Chine pour 2012 et 2013.



Source : Observatoire européen de l'audiovisuel/LUMIERE, comScore, Oanda

Graphique 3. Parts de marché des films européens hors d'Europe, 2012-2016

Estimation. Selon LUMIERE.



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

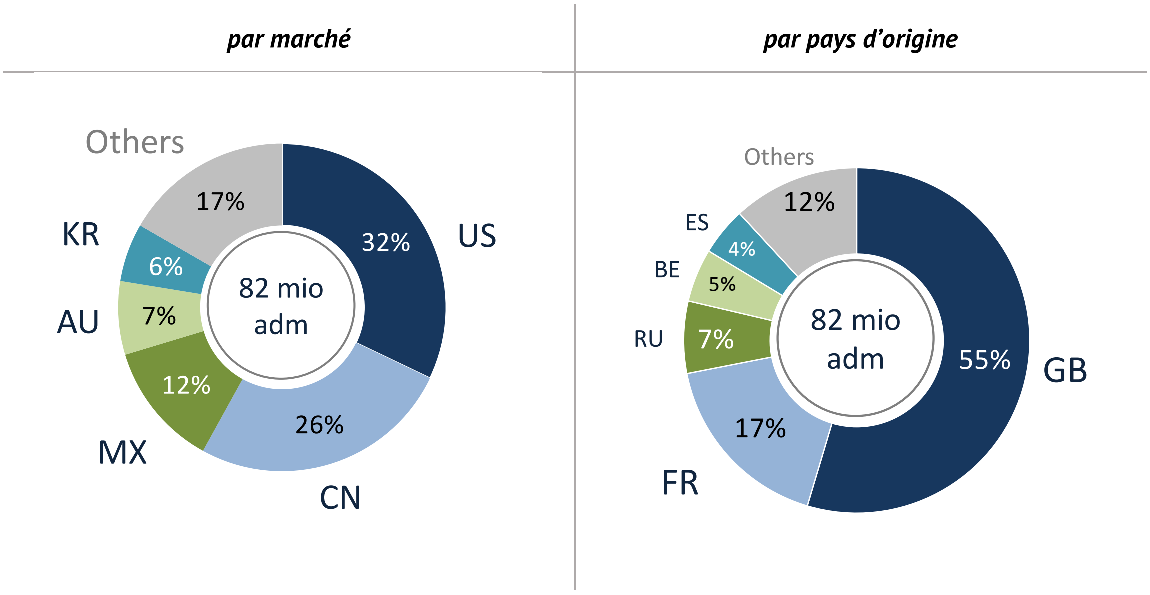
L'Amérique du Nord est le principal marché pour les films européens hors d'Europe

Le marché nord-américain reste le marché « étranger » le plus important pour les films européens pour ce qui est des entrées en salles. En 2016, il est estimé que les films européens ont vendu 29,8 et 2,7 millions de billets respectivement aux États-Unis et au Canada. Par conséquent, avec 32% du total des entrées réalisées par les films européens hors d'Europe, le marché américain représente le marché unique le plus important pour les films européens. La part du marché canadien est de 4 %.

Malgré un nombre très restreint de sorties européennes, la Chine s'est clairement imposée comme le deuxième marché le plus important pour les films européens pour ce qui est des entrées en salles avec 18,6 millions de billets vendus en 2016, soit 23 % du total des entrées, suivie par le Mexique (12 %), l'Australie (7 %) et la Corée du Sud (6 %).

Graphique 4. Entrées réalisées par les films européens hors d'Europe en 2016 – par marché et par origine

Estimation. Selon LUMIERE.



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

Les films français et britanniques représentent cumulativement 72% des entrées des films européens en 2016

Les entrées en salles des films européens sont assez concentrées : les films français et britanniques représentent cumulativement 72 % du total des entrées des films européens hors d'Europe en 2016.

Le Royaume-Uni a pris à la France la place de premier pays exportateur de films européens en 2016, les films britanniques ayant vendu 44,6 millions de billets, soit 55 % du total des entrées. Les films français arrivent en deuxième position, avec 14,1 millions d'entrées (17 % du total des entrées des films européens). Les films russes suivent à distance, avec 5,5 millions de billets vendus hors d'Europe en 2016 (7 %), devant les films belges (4,1 millions) et espagnols (3,7 millions).

N.B. : compte tenu des différences de méthodologie, les données peuvent différer des chiffres publiés par les sources nationales.

Nine Lives (FR/CN/CA) est le film européen qui a connu le plus grand succès hors d'Europe avec 7,2 millions de billets vendus

Nine Lives (FR/CN/CA), la comédie familiale en langue anglaise d'EuropaCorp, est sorti sur les 12 marchés non européens suivis et a vendu 7,2 millions de billets hors d'Europe en 2016, représentant ainsi 9 % du total des entrées réalisées par les films européens hors d'Europe. Il s'agit d'un résultat comparativement médiocre par rapport aux meilleurs films des années précédentes : en 2014 *Lucy* (FR) a vendu 31,9 millions de billets, soit 39 % du total des entrées réalisées par les films européens hors d'Europe et *Taken 3* (FR) a vendu 25,6 millions de billets en 2015 (24 %). *Bridget Jones's Baby* (GB/US/FR) arrive en deuxième posution avec 6,4 millions d'entrées devant l'épisode spécial Noël de *Sherlock: The Abominable Bride* (GB) proposé par la BBC qui est sorti en salles dans 4 territoires non européens et a vendu 5,6 millions de billets. Ces trois films sont les seuls films européens à avoir vendu plus de 5 millions de billets hors d'Europe, alors que six films avaient passé ce seuil en 2015.

ZUSAMMENFASSUNG

Der Schwerpunkt dieses Berichts liegt auf der Kinoauswertung europäischer Filme ausserhalb Europas. Dabei ist zu berücksichtigen, dass - allgemein gesagt - die Auswertung im Kino nur eines von vier Marktsegmenten darstellt. Auch die TV-, Video- und VoD-Märkte können für europäische Filme ein wichtiges Marktpotenzial darstellen, doch sind quantitative Angaben dazu aufgrund der fehlenden Transparenz der entsprechenden Konsumdaten nicht möglich.

Das Volumen des Kinomarkts für europäische Filme außerhalb Europas 2016

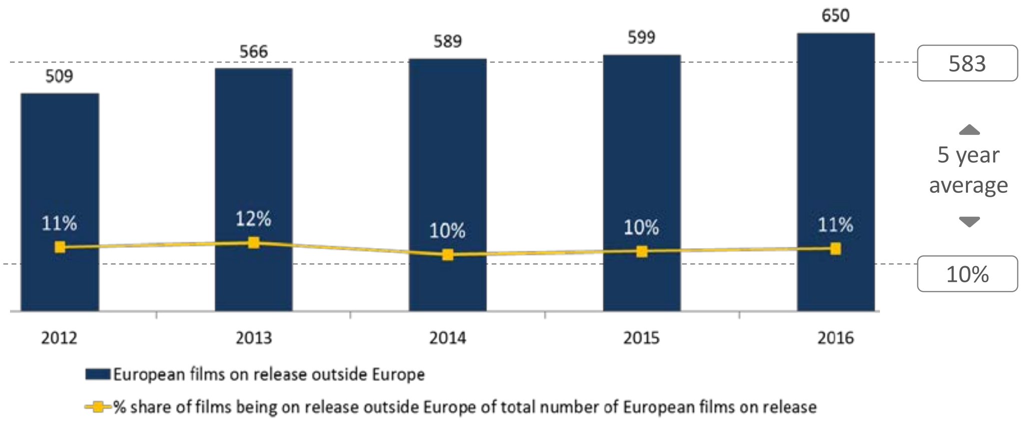
Schätzungsweise wurden insgesamt 650 europäische Filme in mindestens einem der 12 in diesem Bericht erfassten nichteuropäischen Märkte im Kino ausgewertet. Das ist die höchste Anzahl von europäischen Filmen, die in der letzten fünf Jahren außerhalb Europas im Kino gezeigt wurden, und entspricht ca. 11% sämtlicher europäischer Filme, die weltweit im Kino laufen (siehe Abb. 1).

Diese 650 Filme wurden außerhalb Europas von insgesamt ca. 82 Mio. Kinobesuchern gesehen. Dies entspricht den Besucherzahlen der Jahre 2013 bzw. 2014; der Wert liegt jedoch unter dem 5-Jahres-Durchschnitt von 97 Mio. (siehe Abb. 2). Unter Ansatz lokaler Eintrittspreise wurde mit europäischen Filmen außerhalb Europas ein ein geschätztes Bruttoeinspielergebnis in Höhe von EUR 475 Mio. erzielt.

Europäische Filme machen 19% der im Kino gezeigten Filme (dies entspricht dem 5-Jahresdurchschnitt) und 2% der Besucherzahlen in den erfassten 12 nichteuropäischen Märkten aus. Das ist der geringste Marktanteil in den letzten fünf Jahren (der Durchschnitt liegt bei 3%) (siehe Abb. 3).

Abb. 1 Anzahl europäischer Filme mit Kinoauswertung außerhalb Europas 2012-2016

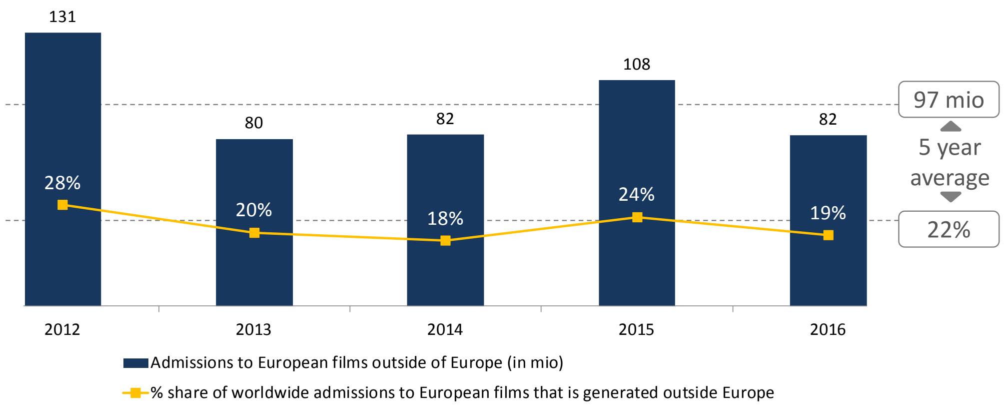
Geschätzt. Wie in LUMIERE dargestellt.



Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE; comScore

Abb. 2 Besucherzahlen europäischer Filme außerhalb Europas 2012-2016 (in Mio.)

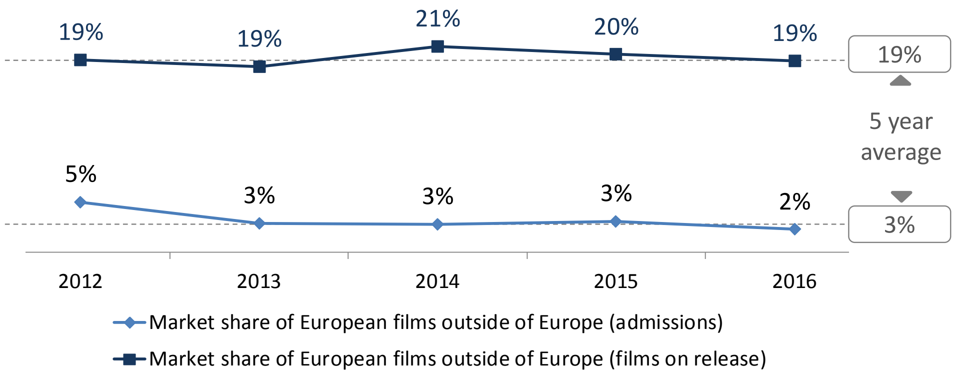
Wie in LUMIERE dargestellt. Pro-forma-Schätzungen für China für 2012 und 2013.



Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE; comScore, Oanda

Abb. 3 Marktanteile europäischer Filme außerhalb Europas 2012-2016

Geschätzt. Wie in LUMIERE dargestellt.



Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE; comScore

Nordamerika ist der größte Markt für europäische Filme außerhalb Europas

Der nordamerikanische Markt hat seine Stellung als wichtigster „Überseemarkt" für europäische Filme in Bezug auf Besucherzahlen gehalten. Im Jahr 2016 wurden in den USA und Kanada 29,8 bzw. 2,7 Mio. Kinokarten für europäische Filme verkauft. Der US-amerikanische Markt ist somit der größte Einzelmarkt für europäische Filme, auf den 32% der Gesamtbesucherzahlen europäischer Filme außerhalb Europas entfallen; auf den kanadischen Markt entfallen 4%.

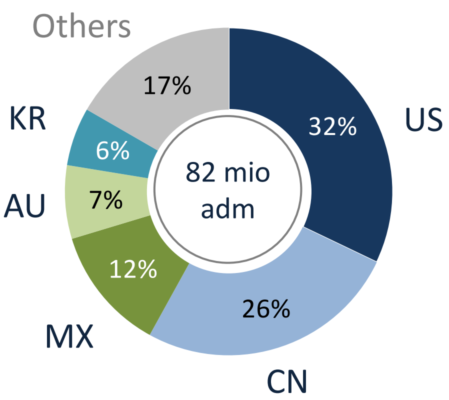
Trotz der sehr begrenzten Anzahl von europäischen Filmen mit Kinoauswertung in China ist dieses Land mit 18,6 Mio. verkauften Kinokarten 2016 eindeutig – gemessen am Volumen der Besucherzahlen - der zweitgrößte Markt für europäische Filme ausserhalb

Europas. Dies entspricht 23% der Gesamtbesucherzahlen; auf den Plätzen folgen Mexiko (12%), Australien (7%) und Südkorea (6%).

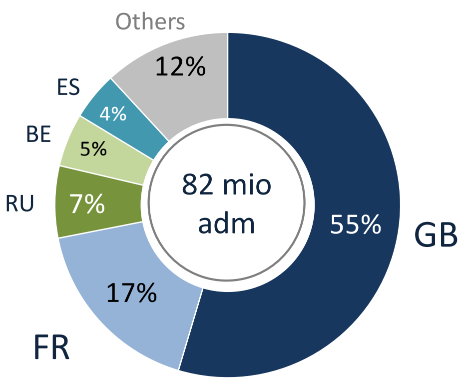
Abb. 4 Besucherzahlen europäischer Filme außerhalb Europas – nach Markt und Herkunft

Geschätzt. Wie in LUMIERE dargestellt.

nach Markt



nach Herkunftsland



Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE; comScore

Auf französische und britische Filme zusammengenommen entfallen 2016 72% der Besucherzahlen europäischer Filme

Bei den Besucherzahlen liegt eine starke Konzentration auf Filme aus dem Vereinigten Königreich (UK) und Frankreich (FR) vor; im Jahr 2016 entfielen 72% der Gesamtbesucherzahlen europäischer Filme außerhalb Europas auf Filme aus diesen beiden Ländern. Dabei hat das Vereinigte Königreich Frankreich als das erfolgreichste Filmexportland überholt: 2016 wurden für britische Filme insgesamt 44,6 Mio. Kinokarten verkauft; dies entspricht 55% der Gesamtbesucherzahlen europäischer Filmer. Auf dem zweiten Platz folgen französische Filme mit 14,1 Mio. Besuchern (17%). Mit Abstand folgen russische Filme, für die 2016 außerhalb Europas insgesamt 5,5 Mio. Kinokarten verkauft wurden (7%); die weiteren Plätze belegen belgische (4,1 Mio.) und spanische Filme (3,7 Mio.).

NB: Aufgrund methodologischer Unterschiede können sich im Vergleich zu den von nationalen Filmagenturen veröffentlichten Zahlen Abweichungen ergeben.

Mit 7,2 Mio. verkauften Tickets war der Film Nine Lives (FR/CN/CA) [deutscher Titel: „Voll verkatert"] der erfolgreichste europäische Film außerhalb Europas

Die von EuropaCorp produzierte englischsprachige Familienkomödie *Nine Lives [deutscher Titel: Voll verkatert]* war in 9 von 12 der hier berücksichtigten nichteuropäischen Märkten im Kino zu sehen. Für den Film wurden 2016 außerhalb Europas 7,2 Mio. Tickets verkauft; dies entspricht 9% der Gesamtbesucherzahlen europäischer Filme außerhalb Europas. Im Vergleich zu den Top-Filmen früherer Jahre ist das ein relativ schwaches Ergebnis: 2014 wurden für *Lucy (FR),* auf den 39% der Gesamtbesucherzahlen europäischer Filme außerhalb Europas entfielen, 31,9 Mio. Kinokarten verkauft, und für *Taken 3* (FR) wurden 25,6 Mio. Karten verkauft, was 24% der Besucher entsprach.

Bridget Jones's Baby (GB/US/FR) liegt mit 6,4 Mio. Besuchern auf dem zweiten Platz, gefolgt von einer Weihnachtssonderfolge der Sherlock-Serie der BBC *Sherlock - The abominable bride [deutscher Titel: Sherlock - Die Braut des Grauens]*. Für diesen Film, der in 4 nichteuropäischen Gebieten im Kino zu sehen war, wurden 5,6 Mio. Tickets verkauft. Die genannten drei Filme waren die einzigen europäischen Filme, für die außerhalb von Europa mehr als 5 Mio. Kinokarten verkauft wurden - 2015 erreichten noch sechs Filme diesen Wert.

2. INTRODUCTION & METHODOLOGY

2.1. Introduction

About this report

This report aims to provide a high-level analysis of the theatrical markets for European films outside Europe based on admissions data provided by comScore for 12 non-European markets including the North American market, five Latin American markets, China and South Korea as well as Australia and New Zealand. The analysis focuses on 2016 data but is complemented by five-year data series for the period 2012 to 2016 for all major indicators.

The report focuses on providing a „big picture" overview of the circulation of European films as a whole rather than analysing the film exports of individual European countries. The latter may require different – sometimes country specific – methodological choices / research angles which are beyond the scope of this report. It is 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 the analysis of the export of films originating from a specific country, please refer to national sources. See methodological remarks for further details.

The report addresses in particular the following research questions:

- How important is non-national exploitation, particularly outside Europe, for European films? How many European films are theatrically released outside Europe? How many admissions and GBO do they generate?
- What is their market share in the respective non-European markets?
- What are the most important theatrical markets for European films outside Europe?
- For which European countries is export outside Europe particularly important?
- Which European films performed particularly well outside Europe?

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 and the European Union, represented by the European Commission. It operates within the legal framework of the Council of Europe and works alongside a number of partner and professional organisations from within the audiovisual industries. The mission of the Observatory is to collect, process and publish information about the various audiovisual industries, i.e. primarily film, TV, home entertainment and on-demand industries in Europe.

In these areas the Observatory systematically collects statistical data and provides market as well as legal analysis which are distributed e.g. in the form of:

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

2.2. Data scope & sources

Data scope

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

This report covers 2016 admissions data for 12 non-European markets and puts them in the context of admissions data for another 33 European markets covered in the LUMIERE database:

Market region	Countries covered in 2016
North America	Canada (CA) USA (US)
Latin America	Argentina (AR) Brazil (BR) Chile (CL) Colombia (CO) Mexico (MX) Venezuela (VE)
Oceania	Australia (AU), New Zealand (NZ)
Asia	China (CN), South Korea (KR)
Europe (covered at least partially)	Austria, Belgium, Bulgaria, Bosnia-Herzegovina, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Georgia, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK & Ireland (treated as one market)

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 seems 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 outside Europe. Given the lack of comprehensive and fully comparable data sets, it cannot be determined to which degree these are structural differences and to which degree this is simply caused by more limited data sets for non-European markets. Also note, that comScore data for the US and Canadian market appear to not provide full coverage of admissions to French language films e.g. in Québec. Hence, all data in this report drawn from LUMIERE are to be interpreted as estimated minimum figures.

Data sources

The data sample analysed in this report comes from two sources: Admissions data for the 12 non-European markets covered in this report have been provided comScore. While data for the years 2013 to 2016 have been purchased by the European Audiovisual Observatory on behalf of a buying group consisting of several EFARN members, data for the year 2012 have been kindly provided by the French CNC and the European Union's MEDIA Programme. All European admissions data come from the European Audiovisual Observatory's LUMIERE database which collates annual admissions from a wide variety of sources.

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.

www.comscore.com

LUMIERE database on film admissions

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

www.lumiere.obs.coe.int

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

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

www.cnc.fr

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.

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

2.3. 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 variety of business models through which theatrical films can be commercially exploited on the one hand, and the intransparency of certain market segments with regard to consumption data on the other hand.

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

However it is the intransparency of most exploitation markets with regard to consumption data which poses the major obstacle in measuring film market volume across the various windows. The theatrical cinema market is practically the only window for which reliable data are available. While in most countries data are in fact being tracked for the home entertainment (DVD / 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 their tracking practically impossible for an organisation like the Observatory. In the case of VOD markets, the situation is even worse as they still remain more or less completely intransparent with regard to consumer expenditures in the vast majority of markets.

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

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

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

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

In principle the data set covers all feature fiction, documentary or animation films on theatrical release, i.e. films with at least one commercial theatrical screening in one of the markets covered. This includes - from a methodological perspective - holdovers, re-releases, retrospectives, paid festival screenings etc. Alternative content screenings, concert recordings and short film compilations are not taken into account 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 as a film "on release". This includes first releases, holdovers, re-releases, retrospectives, paid festival screenings etc. Please note that differences in the coverage rate of individual markets and in particular differences between Europe and non-European markets regions can limit the direct comparability of the indicator "number of films on release" and distort any related statistical analysis: In many European countries LUMIERE seems to cover a higher number of smaller and repertoire films with very few admissions than covered by comScore data outside Europe. The number of films on release hence is portrayed as significantly higher in some markets than in others. Given the lack of comprehensive and fully comparable data sets, it cannot be determined to what degree these are structural differences and to which degree this is simply caused by more limited data sets for non-European markets.

What is a "first release"?

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

It is difficult to identify the number of first releases: On the one hand, there is an issue with regard to data quality: release dates may be missing or may refer to the "release date" in a particular year rather than the original release date of the film. Hence some re-releases / holdovers / festival releases might be counted as commercial first releases and all data are to be considered estimates. On the other hand, there is an inherent methodological issue in defining a “first release” on a multi-territory basis which is best illustrated by an example: A French film can be released in France in 2013, in the US in 2014 and in China in 2015. Should this film be counted as a first release outside Europe in 2015?

In answering this question, one can apply two different definitions:

- Wide definition: A first release outside Europe refers to films that were first released in at least one non-European market in a specific year. According to this definition the above mentioned film is considered a first release in 2015, as it is counted as such in China.
- Narrow definition: A first release outside Europe refers to films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before. When applying this definition to a region, the region is treated as if it were a single market. According to this definition the above mentioned film is considered a first release outside Europe in 2014 and an “other release” in 2015.

What are “admissions”?

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

What is “GBO”?

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

What is the definition of a “European film”?

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

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

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

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

What is 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 is available in the Observatory’s LUMIERE database (see data scope). This figure ranges between 30 and 34 European markets in any of the years between 2012 and 2016.

What is an “INC” film?

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

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

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

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

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

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

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

What is the definition of “co-production”?

A co-production is defined as a film whose production budget is financed by sources stemming from two or more countries. The country providing the majority of the financing, i.e. the majority coproduction country, is considered to be the country of origin. In the case of an parity co-production, e.g. Germany 40% / France 40% / Spain 20%, the nationality of the director and subsidiarily the cultural content of the film determine to which country the film is allocated on a case-by-case basis.

Co-productions are indicated in LUMIERE by the allocation of at least two countries of origin, e.g. “AT / DE” stands for an Austrian majority and German minority co-production.

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

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

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

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

What are “national” / “non-national” admissions / markets?

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

<u>What does “worldwide” refer to?</u>

In the context of this report the term "worldwide“ refers to the entirety of the 30 to 34 European and 12 non-European markets which are – at least partially – covered in this report.

<u>What does “outside Europe” / ”non-European” mean exactly?</u>

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

How is "average" defined?

In the context of this study an average value can be expressed either as the "mean" or the "median" value. The mean refers to the arithmetical total of all the values in the array divided by the number of values. The median is found by arranging the values in order and selecting the middle value. 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 have an impact on the interpretation of the data. The coverage rates of each market for the years 2011 to 2015 are shown in the appendix.

Evidently, the number of films covered has a direct impact on the number of films tracked to be on release. It has however hardly any impact on the other indicators, i.e. the number of first releases, admissions and GBO. Nevertheless, all 2016 data are to be considered as provisional data .

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 comScore and OBS film data matched?

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

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

3. THE BIG PICTURE 2016

3.1. Theatrical market volume of European films

Total "film market volume" obscure due to intransparent markets

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

The theatrical cinema market is practically the only exploitation window for which reliable consumption 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 their tracking practically 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 out 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. [1]

Theatrical market volume of European films worldwide in 2016

Theatrical market volume can be measured in terms of film offering, i.e. the number of films on release, admissions and gross box office (GBO). Figure 5 overleaf provides a „big picture" overview of the volume and breakdown of worldwide market volume to European films in 2016. As mentioned above the term „worldwide" refers to cumulative data for the 33 European and 12 non-European markets covered in this report[2]. Given this partial coverage data have to be interpreted as minimum values.

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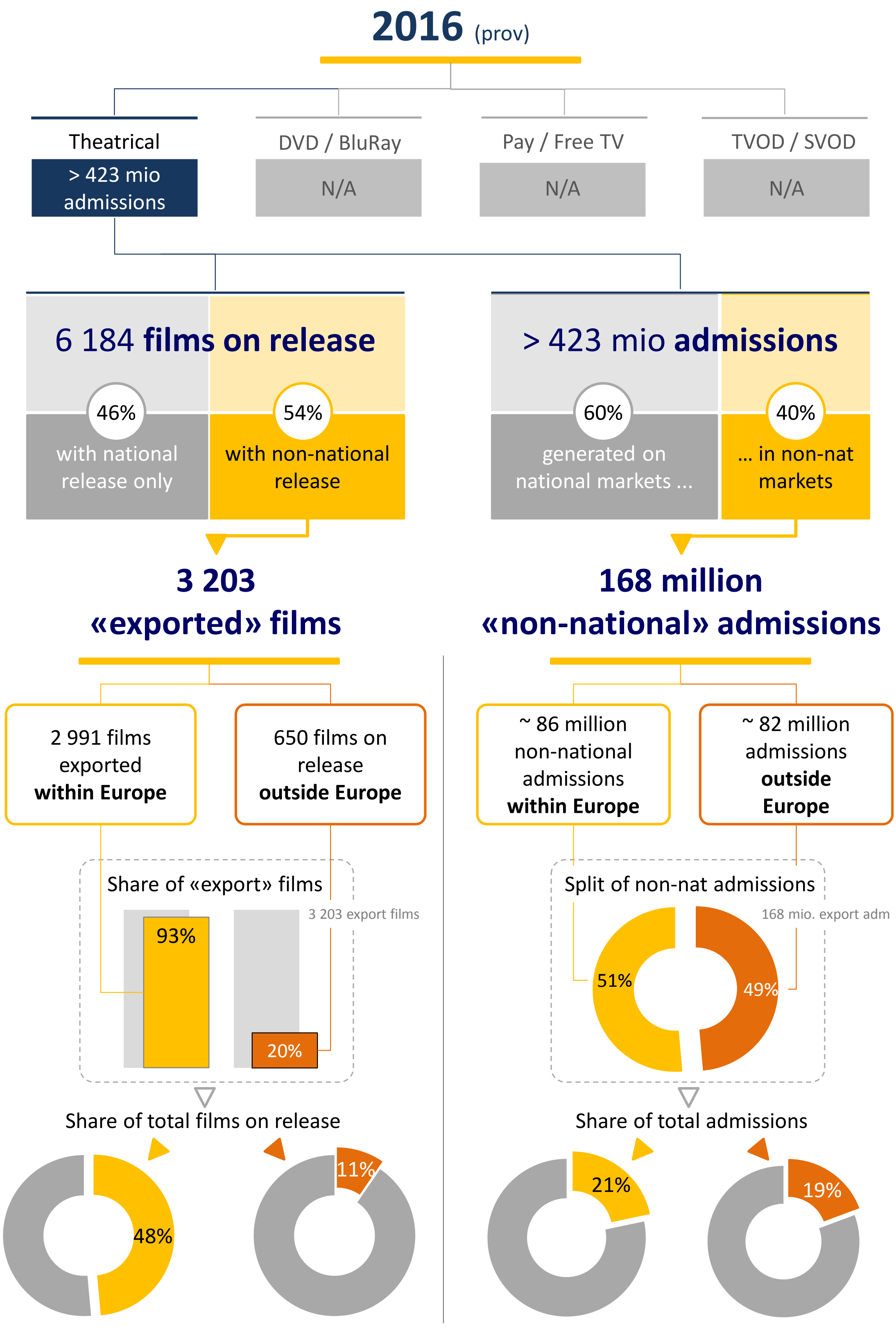
[1] In the UK – which is one of the few countries in which consumer expenditures or retail equivalents – were measured for all market segments the data suggest that theatrical GBO accounted for 27% of total revenues in 2013, representing the third largest market segment behind TV (38%) and physical video sales and rentals which in 2013 were still slightly above box office levels. Data for the French market for instance suggest that the market share of French films is twice is high on the theatrical market than it is on the physical video market. Given the lack of data it remains however unclear to which extent these results are representative for film exploitation in other European countries.

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

Figure 5. At a glance: "Worldwide" theatrical market volume of European films – 2016

Provisional estimates.



Source: European Audiovisual Observatory / LUMIERE, comScore

Based on the title-by-title admissions data provided to the Observatory by comScore as well as national data providers 6 184 European films could be identified as being "on release". That means that 6 184 European films sold at least one ticket for a theatrical screening in at least one of the markets covered in 2016. This figure is slightly higher than in 2015 and can be expected to ultimately even top 2014 when 6 188 European films were tracked to be on release (see Table 1).

Practically all European films tracked to be on release in 2016 were on release in at least one of the European markets (97%), while only 11% of European films were identified to be on release outside Europe. This is well in line with percentage shares observed between 2012 and 2016.

Table 1. Number of European films on release by release region 2012-2016

As tracked in LUMIERE. Data for 2016 are provisional.

	2012	2013	2014	2015	2016 prov	Avg
"Worldwide"	4 730	4 916	6 188	5 974	6 184	5 598
In Europe	4 622	4 762	6 061	5 861	6 027	5 467
Outside Europe	509	566	589	599	650	583
- % share in Europe	*98%*	*97%*	*98%*	*98%*	*97%*	*98%*
-% share Outside Europe	*11%*	*12%*	*10%*	*10%*	*11%*	*10%*

Source: European Audiovisual Observatory / LUMIERE, comScore

European films cumulatively generated about 423 million admissions, i.e. ticket sales, in the 45 "worldwide" sample markets in 2016. Applying annual average ticket prices the Observatory estimates that European films earned roughly EUR 2.7 billion in gross box office. These are results are well below the five year average values for the time period 2012 to 2016.

As shown in Table 2, 81% of "worldwide" admissions to European films were generated on European markets, while ticket sales outside Europe accounted for 19%. This is the second lowest share of film exports outside Europe in the past five years.

The comparatively poor performance of European films outside Europe can be partly explained by the lack of any breakout success and the comparatively low number of European "blockbusters" which sell more than 5 million tickets (3 films in 2016 compared to 6 in 2015).

European markets are estimated to be even more important in terms of GBO, accounting for an estimated 82% of "worldwide" GBO in 2016. This is due to higher average ticket prices compared to e.g. the Latin American markets. Nevertheless, on a cumulative level European films are estimated to have generated 18% of their GBO takings outside Europe in 2016.

Table 2. Admissions and GBO to European films "worldwide" 2012-2016

Pro-forma estimates for China for 2012 and 2013 otherwise as tracked in LUMIERE. GBO estimated based on average ticket prices and converted to Euro at average annual exchange rate.

Admissions (in mio)	2012	2013	2014	2015	2016 prov	Avg
"Worldwide"	**474**	**397**	**458**	**447**	**423**	**440**
In Europe	343	317	376	341	341	344
Outside Europe	131	80	82	108	82	97
- % share in Europe	*72%*	*80%*	*82%*	*76%*	*81%*	*78%*
-% share outside Europe	*28%*	*20%*	*18%*	*24%*	*19%*	*22%*

GBO (in MEUR)	2012	2013	2014	2015	2016 prov	Avg
"Worldwide"	**3 090**	**2 538**	**3 092**	**2 932**	**2 684**	**2 867**
In Europe	2 368	2 121	2 597	2 322	2 209	2 323
Outside Europe	722	416	496	610	475	544
- % share in Europe	*77%*	*84%*	*84%*	*79%*	*82%*	*81%*
-% share outside Europe	*23%*	*16%*	*16%*	*21%*	*18%*	*19%*

Source: European Audiovisual Observatory / LUMIERE, comScore

2016: share of European film exports stable, while share of export admissions decreases

3 203 European films – 52% of European films identified to be on theatrical release in 2016 - were exported, i.e. released in at least one non-national market. This is the highest number tracked in the past five years, albeit it exceeds the 2014 level of 3 181 export films only marginally.

More or less all of these "export" films received a release on a non-national market within Europe, while 650 of them were on release in at least one of the 12 non-European territories covered. Thus, in 2016 about 11% of all European films on release were screened outside Europe.

On a cumulative level, European films generated 60% of their total admissions on their respective national markets while theatrical exports, i.e. non-national admissions, accounted for about 40% of the overall admissions.

Breaking non-national admissions further down, the data suggest that about 86 million tickets were sold on non-national European markets while 82 million tickets were sold in the 12 non-European markets covered. These figures show that - on a cumulative level - theatrical exploitation outside Europe continued to contribute a significant, albeit a somewhat lower, share of the overall theatrical market volume of European films: About 19% of estimated worldwide admissions and almost half of non-national admissions (49%) to European films were generated outside Europe.

Table 3. "National" vs. "non-national" market volume of European films 2012-2016

Pro-forma admission estimates for China for 2012 and 2013 otherwise as tracked in LUMIERE.

Films on release	2012	2013	2014	2015	2016 prov	Avg
"Worldwide"	**4 730**	**4 916**	**6 188**	**5 974**	**6 184**	**5 598**
On national market	2 687	2 895	4 124	3 961	4 074	3 548
On non-national market	2 827	2 794	3 181	3 084	3 203	3 018
% share national	*57%*	*59%*	*67%*	*66%*	*66%*	*63%*
% share "export films"	*60%*	*57%*	*51%*	*52%*	*52%*	*54%*
- Non-nat. in Europe	2 671	2 611	3 006	2 930	2 991	2 842
- Non-nat. outside Europe	509	566	589	599	650	583
% share export within Europe	*56%*	*53%*	*49%*	*49%*	*48%*	*51%*
% share outside Europe	*11%*	*12%*	*10%*	*10%*	*11%*	*10%*

Admissions (in mio)	2012	2013	2014	2015	2016 prov	Avg
"Worldwide"	**474**	**397**	**458**	**447**	**423**	**440**
On national market	227	237	277	244	255	248
On non-national market	247	160	181	203	168	192
% share national	*48%*	*60%*	*60%*	*55%*	*60%*	*57%*
% share "export films"	*52%*	*40%*	*40%*	*45%*	*40%*	*43%*
- Non-nat. in Europe	116	80	99	95	86	95
- Non-nat. outside Europe	131	80	82	108	82	96
% share export within Europe	*24%*	*20%*	*22%*	*21%*	*20%*	*22%*
% share outside Europe	*28%*	*20%*	*18%*	*24%*	*19%*	*22%*

Source: European Audiovisual Observatory / LUMIERE, comScore

4. MARKET VOLUME OUTSIDE EUROPE IN 2016

4.1. European film releases outside Europe

As explained in the methodology section, measuring film releases, particularly across multiple territories, is a difficult exercise where no clear-cut definitions can be applied and no individual indicator emerges as the sole reference indicator. Consequently, two complementary indicators will be analysed in the context of this report: the number of films on release as well as the number of first releases.

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[3] .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 ***first releases*** indicator on the other hand only counts films which get a proper commercial release for the first time in a specific territory or region[4] . This represents the narrowest possible definition of a film release. Even though representing a comparatively small share of the films on release, first releases generally account for the vast majority of admissions.

[3] 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 the comparison over time. It should however be noted, that the number of films on release is directly linked to the coverage rate achieved by comScore 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.

[4] 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. Two definitions are introduced in Chapter 2: a “wide definition” (films which were first released in at least one non-European market in a specific year) and a “narrow definition” (films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before). Which of the two definitions is more appropriate may differ depending on the research question to be analysed.

By analysing both of these two indicators 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.

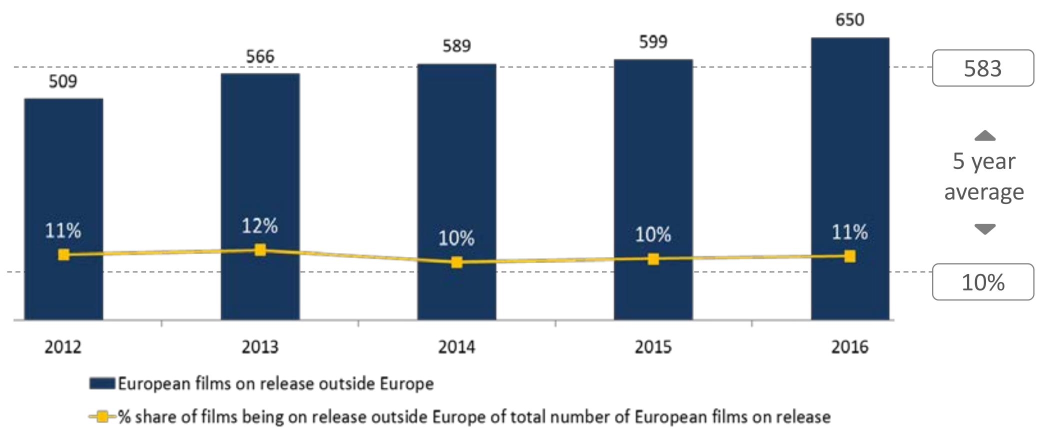
650 European films on release outside Europe in 2016

The number of European films on theatrical release outside Europe has been growing consistently since 2012 and has reached a temporary record high in 2016 with 650 European films being tracked by comScore to be on release in cinemas outside Europe. This includes first releases as well as holdovers, re-releases and festival or other screenings in commercial cinemas.

These 650 films represent 11% of the 6 184[5] of European films which could be identified to be on theatrical release in at least one of the 45 countries covered in this study. In other words, only one in ten European films tracked to be on release in 2016 was screened in a cinema outside Europe.

Figure 6. Number of European films on release outside Europe 2012-2016 (estimates)

Remark: The fact that data for China are only available from 2014 onwards does not limit the comparability of the number of films on release due to the low number of European films which were only on release in China (9 in 2014 / 11 in 2015 / 15 in 2016).



Source: European Audiovisual Observatory / LUMIERE, comScore

The number of European films on theatrical release outside Europe between 2012 and 2016 is shown in further detail in Table 4 overleaf which includes release data for all non-European markets covered in this study. Looking at the entire five year period from

[5] 2016 figures are based on LUMIERE data as of 30/10/2017. Additional admissions data, particularly from declarations to the MEDIA Programme, remain to 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.

2012 to 2016 the number of European film releases has grown in all world regions with the exception of the North American market as well as South Korea.

The growth in the number of European films on release in 2016 is linked primarily to an increasing number of European films being screened in the Latin American sample countries where 418 European films were screened, compared to 376 in 2015 and 216 in 2012. In contrast, the number of European films tracked to be on release in Oceania (140 films) and China (37 films) and continued to decrease in the North American market (from 277 films in 2012 to 210 films in 2015 to 193 in 2016). 2016 also did not show any increase in European film releases in South Korea, where the number of European films on releases remained at 97 films, compared to 180 films in 2013.

Table 4. Number of European films on release outside Europe 2012-2016

As tracked in LUMIERE.

	2012	2013	2014	2015	2016	*Average*
Outside Europe	**509**	**566**	**589**	**599**	**650**	**583**
US & CA	**277**	**273**	**218**	**210**	**193**	**234**
Latin America	**216**	**226**	**318**	**376**	**418**	**311**
AU & NZ	**101**	**102**	**126**	**127**	**140**	**119**
CN & KR	**-**	**-**	**155**	**128**	**126**	**136**
CA	149	133	94	88	88	110
US	217	202	188	174	174	191
AR	74	58	87	117	117	91
BR	93	111	144	194	195	147
CL	31	30	40	58	58	43
CO	61	63	94	124	125	93
MX	87	75	130	160	161	123
VE	34	24	23	5	36	24
AU	87	75	110	120	120	102
NZ	60	70	72	74	74	70
CN	-	-	22	34	37	31
KR	114	180	142	97	97	126

Source: European Audiovisual Observatory / LUMIERE, comScore

Number of European first releases outside Europe increases to 361 films in 2016

Applying the narrow definition of a "first release" (treating all non-European sample markets as one single territory) an estimated 361 European films premiered in cinemas outside Europe in 2016. In other words, 56% of the European films on release had never been released in cinemas in any of the 12 non-European sample markets before 2016. By implications this means that 44% of the European films on release outside Europe were holdovers and/or re-releases.

In contrast to previous years, the growth in the number of European films on release in 2016 hence stems from an increasing number of first releases. Up until 2015 growth had been driven by an increasing number of holdovers and/or re-releases, growing from 169 in 2012 to 300 in 2015 (see Table 5). The increase in the number of holdovers and / or re-releases over this time period cannot be explained with reliable certainty. One possible explanation for this trend could be that digital cinema has increased the international demand for limited releases / screenings of holdovers or repertoire films. Another reason could be a shortening in the time lag for the international release of films, i.e. that European films released in the past two years were released internationally within one, rather than two years. Yet another - technical - reason can lie in the improved data coverage of comScore over the years. Without a detailed title-by-title analysis, which is beyond the scope of this report, it cannot be determined which of these potential factors impacted the data to which degree.

Table 5. European first releases outside Europe (narrow definition) 2012-2016 (estimated)

Remark: The narrow definition of a first releases refers to films which were first released in at least one non-European market in a specific year and have never been released in any other non-European market before.

	2012	2013	2014	2015	2016	Avg
Films on release	**509**	**566**	**589**	**599**	**650**	**583**
First releases	340	358	300	299	361	332
Other	169	208	289	300	289	251
% share First Releases	67%	63%	51%	50%	56%	57%
% share Other	33%	37%	49%	50%	44%	43%

Source: European Audiovisual Observatory / LUMIERE, comScore

The number of first releases is naturally a bit higher, when applying the wide definition of a first release as it includes films which were first releases in one territory but holdovers in another. In that case an estimated 475 European films premiered in 2016 in at least one of the 12 non-European markets covered in the data sample. That means that 73% of the European films on release outside Europe were released for the first time in at least one of the sample markets in 2016. As illustrated in Table 6 this is the highest level of first releases registered in the past five years.

Table 6. European first releases outside Europe (wide definition) 2012-2016 (estimated)

The wide definition of a first releases refers to films which were first released in at least one non-European market in a given year.

	2012	2013	2014	2015	2016	Avg
Films on release	**509**	**566**	**589**	**599**	**650**	**583**
First releases	474	525	429	415	475	464
Other	35	41	160	184	175	119
% share First Releases	93%	93%	73%	69%	73%	80%
% share Other	7%	7%	27%	31%	27%	20%

Source: European Audiovisual Observatory / LUMIERE, comScore

European films accounted for about 19% of the film offering outside Europe

Measured in terms of number films on release in the 45 sample markets tracked, European films accounted for an estimated 55% of the11 271 films tracked to be on theatrical release in the LUMIERE database at the time of writing[6]. This high share is of course due to the high share of European film releases on European markets, which account for 33 out of the 45 markets tracked worldwide. In Europe, European films accounted for 66% of the approximately 9°200 films identified to have been screened at least once in one of the 33 European markets in 2016.

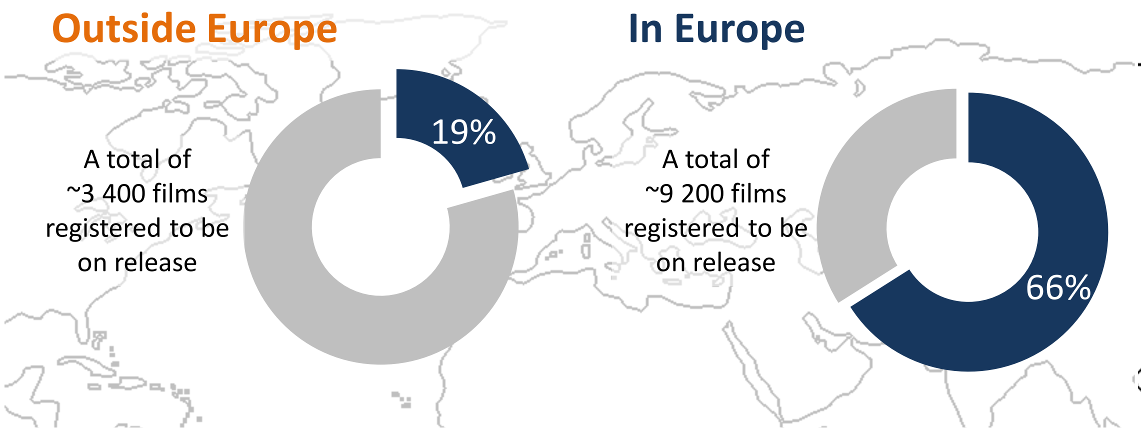
Outside Europe, European films accounted for 19% of the approximately 3°400 films identified to have been screened at least once in the 12 non-European markets in 2016. In other words, one out of five films on theatrical release outside Europe was of European origin.

[6] 2016 figures are are based on LUMIERE data as of 30/10/2017. Additional admissions data, particularly from declarations to the MEDIA Programme, remain to 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.

When measured in terms of first releases - European films accounted for 21% of the approximate 2 281 films which are estimated to have been theatrically released for the first time in at least one[7] of the 12 non-European markets covered.

Figure 7. Market share of European films in terms of films on release 2016

Provisional estimates.



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

Source: European Audiovisual Observatory / LUMIERE, comScore

[7] This figure is based on the „wide“ definition of a „first release“ (see methodological remarks in Chapter 2). Applying the narrow definition, i.e. treating a region as one single market, the percentage share of European first releases drops to 18% (361 European films out of an estimated total of 1 981 first releases outside Europe).

As shown in Table 7, the share of European films in the tracked film offering in 2016 is fairly comparable from region to region, ranging between 25% in Latin America and 22% in Australia & New Zealand. Only Asia, represented by China and South Korea, stands out with a comparatively low share of European films (13%) due to the low number of European films with a theatrical release in China, where European films accounted for only 4% of the tracked film offering in 2016.

Table 7. Market share of European films in terms of films on release 2012-2016 (estimated)

	2012	2013	2014	2015	2016	*Average*
Outside Europe	**19%**	**19%**	**21%**	**20%**	**19%**	**19%**
US & CA	**21%**	**19%**	**24%**	**23%**	**21%**	**21%**
Latin America	**26%**	**24%**	**24%**	**26%**	**27%**	**25%**
AU & NZ	**25%**	**22%**	**22%**	**21%**	**21%**	**22%**
CN & KR	**-**	**-**	**16%**	**12%**	**10%**	**13%**
CA	28%	23%	20%	17%	18%	21%
US	18%	16%	23%	21%	21%	20%
AR	23%	17%	18%	23%	22%	20%
BR	28%	27%	26%	32%	30%	28%
CL	16%	17%	16%	21%	23%	19%
CO	29%	26%	27%	33%	29%	29%
MX	28%	20%	23%	28%	28%	25%
VE	21%	14%	12%	2%	14%	13%
AU	23%	19%	21%	21%	20%	21%
NZ	23%	24%	22%	21%	18%	22%
CN	-	-	5%	5%	4%	5%
KR	24%	25%	24%	19%	20%	22%

Source: European Audiovisual Observatory / LUMIERE, comScore

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.

4.2. Admissions to European films outside Europe

82 million tickets sold to European films outside Europe in 2016

In 2016 European films generated 82 million ticket sales in the 12 non-European markets covered. This means that at least 19% of total “worldwide” admissions to European films occurred outside Europe.

Like in 2014 the vast majority of these admissions were generated by first releases: the 475 European films estimated to have premiered in 2016 in at least one of the 12 non-European markets covered cumulatively generated 80 million admissions, accounting for 98% of total admissions while representing 73% of European films on release outside Europe.

2016 results are significantly lower when compared to 2015 or 2012, when a comparatively large number of European “blockbusters” boosted admissions to European films outside Europe to well above average levels. They are however well in line with results observed in 2013 and 2014.

A look at the five year time series as illustrated in Figure 8, hence suggests that the base line market volume for European films outside Europe is quite stable, amounting to around 80 million admissions per year. Higher admission levels seems to be the exception and are linked to an exceptionally high number of European “blockbuster “ releases: In “normal” years there are between one and three European films which manage to sell more than 5 million admissions outside Europe, while in the “exceptional” years of 2012[8] and 2015 it was six such films.

In fact the stable market volume of EUR 80 million can only be achieved due to significant growth in admissions on the Chinese market which contributed 15.5 million in 2014 and over 21 million admissions in both 2015 and 2016[9]. Indeed China’s share in the cumulative admissions to European films outside Europe has been increasing from an estimated 10% in 2012 to 26% in 2016. At the same time, the Chinese market has been accessible only for an extremely limited number of European films (less than 30 first releases) and does not (yet) offer a realistic market potential for the vast, vast majority of European films.

Taking out China the base line market volume for European films drops to 60 to 67 million admissions. Seen in this light, 2016 results are actually the lowest in the past

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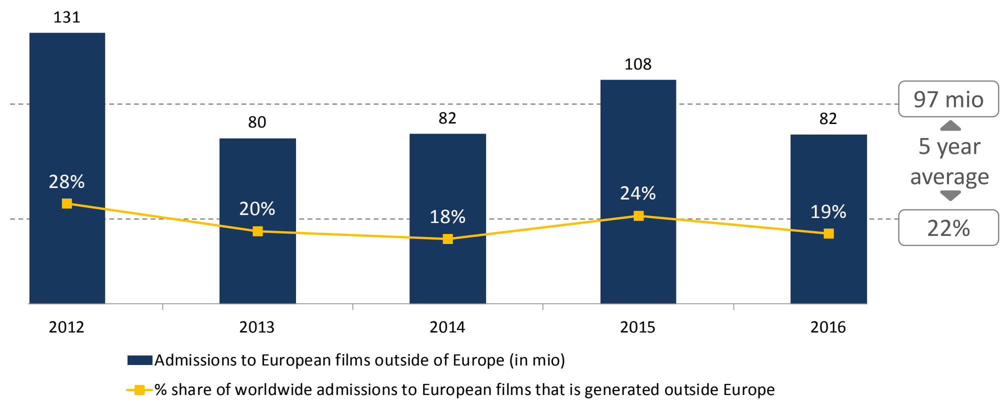
[8] 2012 clearly stands out as a year with exceptionally good results for European films outside Europe as a total of six European films succeeded in generating more than 5 mio admissions [*Taken 2* (26.8 mio), *Les Misérables* (15 mio), *The Woman in Black* (10.6 mio), *Intouchables* (7.3 mio), *The Artist* (6.7 mio), *The Iron Lady* (5.6 mio)] while in other years only 1 to 3 films managed to surpass this benchmark.

[9] Please note that admission values for 2012 to 2013 are **pro-forma estimates** for all 12 non-European markets as reported by Rentrak in 2014 and 2015, including China. Pro-forma estimates for admissions to European films in China for the years 2012 to 2013 are based on the European market share in China in 2014 and are adjusted for Chinese market growth and relative performance of European films in the other non-European markets in each year. The accuracy of these estimates could not be validated due a a lack of data.

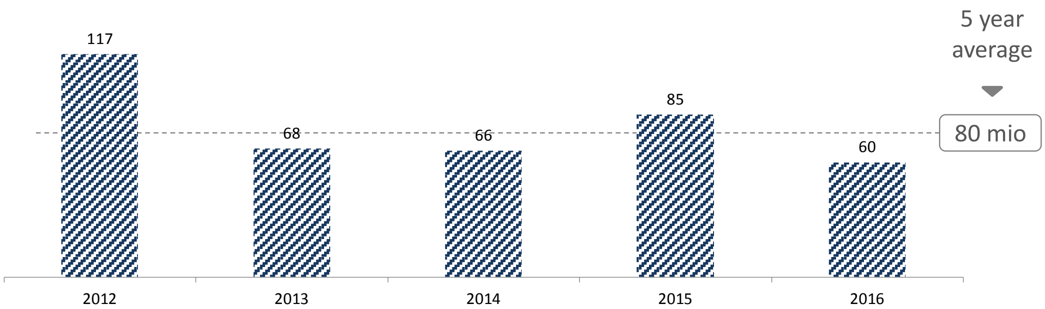
five years. The comparatively poor performance of European films outside Europe in 2016 is primarily due to decreasing admissions on the North and Latin American markets.

Figure 8. Admissions to European films outside Europe 2012 to 2016

Pro-forma admissions estimates for China for 2012 and 2013 otherwise as tracked in LUMIERE.



Pro-forma estimates for cumulative admissions in 11 non-European sample markets EXCLUDING CHINA



Source: European Audiovisual Observatory / LUMIERE, comScore

With 29.8 million admissions North America remained nevertheless the largest market for European films outside Europe accounting for 36% of total admissions in non-European markets as shown in Table 8 overleaf.

Despite registering a decline in admissions in 2016, Asia, represented by China and South Korea, overtook Latin America as the second most important export region for European films with 25.8 million admissions (32%).

Admissions to European films in Latin American dropped from 32.7 million to 18.6 million in 2016, the lowest level in the past five years. Nevertheless Latin American markets remained an important export region for European films accounting for 23% of total admissions to European films outside Europe.

Australia and New Zealand was the only region which registered an increase to European films in 2016, as cumulative admissions increased from 5.1 million to 7.4 million, accounting for 9% of total admissions to European films outside Europe.

See Chapter 7 for further details on the importance of the individual overseas territories for European films.

Table 8. Admissions to European films on release outside Europe 2012-2016

Pro-forma admissions estimates for China for 2012 and 2013 otherwise as tracked in LUMIERE.

	2012	2013	2014	2015	2016	Average
Outside Europe	**130.9**	**80.0**	**82.0**	**108.2**	**81.6**	**96.5**
US & CA	**67.2**	**36.6**	**30.7**	**42.1**	**29.8**	**41.3**
Latin America	**31.1**	**19.0**	**21.2**	**32.7**	**18.6**	**24.5**
AU & NZ	**7.2**	**5.0**	**7.0**	**5.1**	**7.4**	**6.3**
CN & KR	**25.4**	**19.3**	**23.1**	**28.2**	**25.8**	**24.4**
CA	6.3	3.4	3.4	4.2	3.5	4.2
US	60.8	33.3	27.4	37.9	26.2	37.1
AR	4.2	2.7	1.7	2.9	2.0	2.7
BR	6.6	5.3	6.4	8.1	3.7	6.0
CL	0.7	0.7	0.6	1.1	0.6	0.8
CO	3.0	2.2	2.2	3.8	1.8	2.6
MX	15.3	7.4	9.5	15.4	10.0	11.5
VE	1.3	0.7	0.7	1.4	0.4	0.9
AU	6.0	4.0	5.9	4.1	5.9	5.2
NZ	1.1	1.0	1.1	1.1	1.5	1.2
CN est	13.4	12.2	15.5	22.7	21.2	17.0
KR	12.0	7.1	7.5	5.5	4.7	7.4

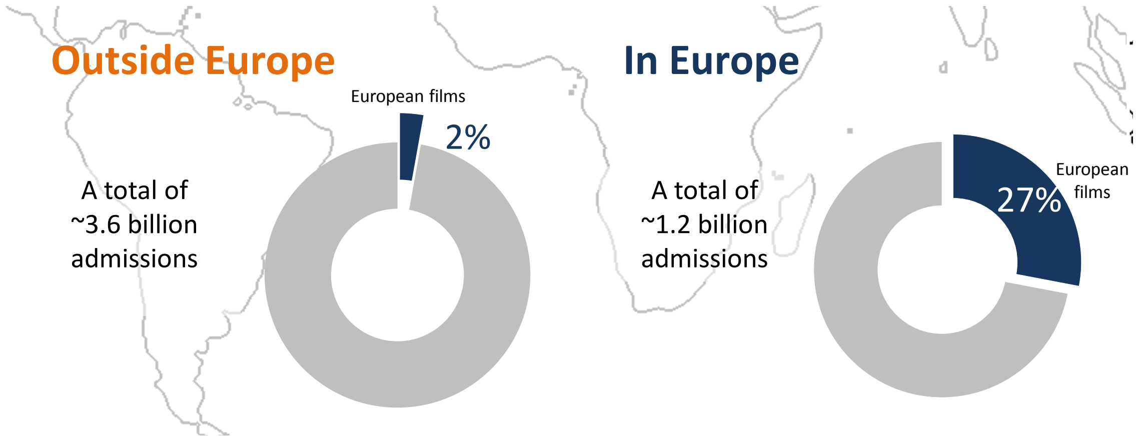
Source: European Audiovisual Observatory / LUMIERE, comScore

2% market share for European films in terms of admissions outside Europe

With 82 million admissions generated in 2016 European films accounted for around 2% of the cumulative 3.6 billion admissions generated by all films tracked in the 12 non-European markets covered in this report (see Figure 9). In comparison, European films claimed a market share of 27% in Europe, generating over 341 million admissions in 2016.

Figure 9. Market share of European films in terms of admissions 2016

Estimates. As tracked in LUMIERE.



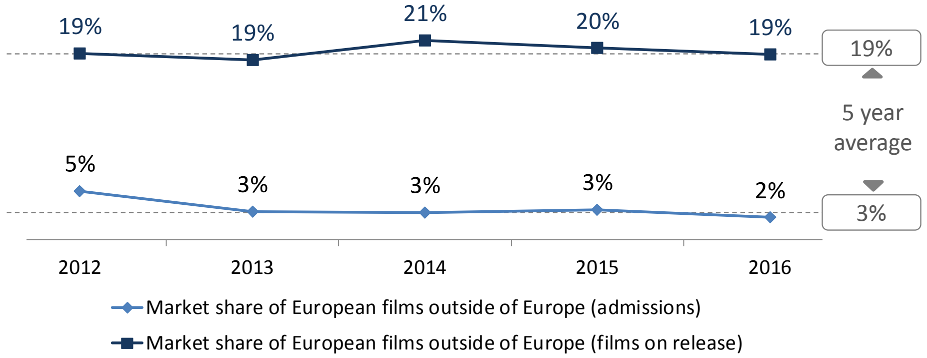
Source: European Audiovisual Observatory / LUMIERE, comScore

As illustrated in Figure 10, the market share of European films outside Europe has remained fairly stable over the past five years: In terms of the number of films tracked to be on release in the 12 non-European markets, European films accounted for 19% in 2016. This corresponds exactly to the average value over the past five years.

In terms of admissions share, European films generally accounted for 2% of the total number of cinema tickets sold in the 12 non-European markets covered. The 2016 market share is hence the lowest in the past five years, albeit only marginally lower than the five-year average value of 3%.

Figure 10. Market share of European films outside Europe 2012-2016

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



Source: European Audiovisual Observatory / LUMIERE, comScore

Like in 2015 the highest market share of European films was registered in New Zealand (9%), followed by Australia (6%) and Argentina (6%). In contrast the lowest market shares of European films were observed in China (2%), the US, Canada, Chile and Venezuela (3%). More detailed figures including a time series of market shares in the individual non-European territories are shown in Table 9 below.

A breakdown of European market share by films originating from individual European countries is shown in Figure 11 overleaf.

Table 9. Market share of European films in terms of admissions 2012-2016

Pro-forma estimates for China for 2012 and 2013 otherwise as tracked in LUMIERE.

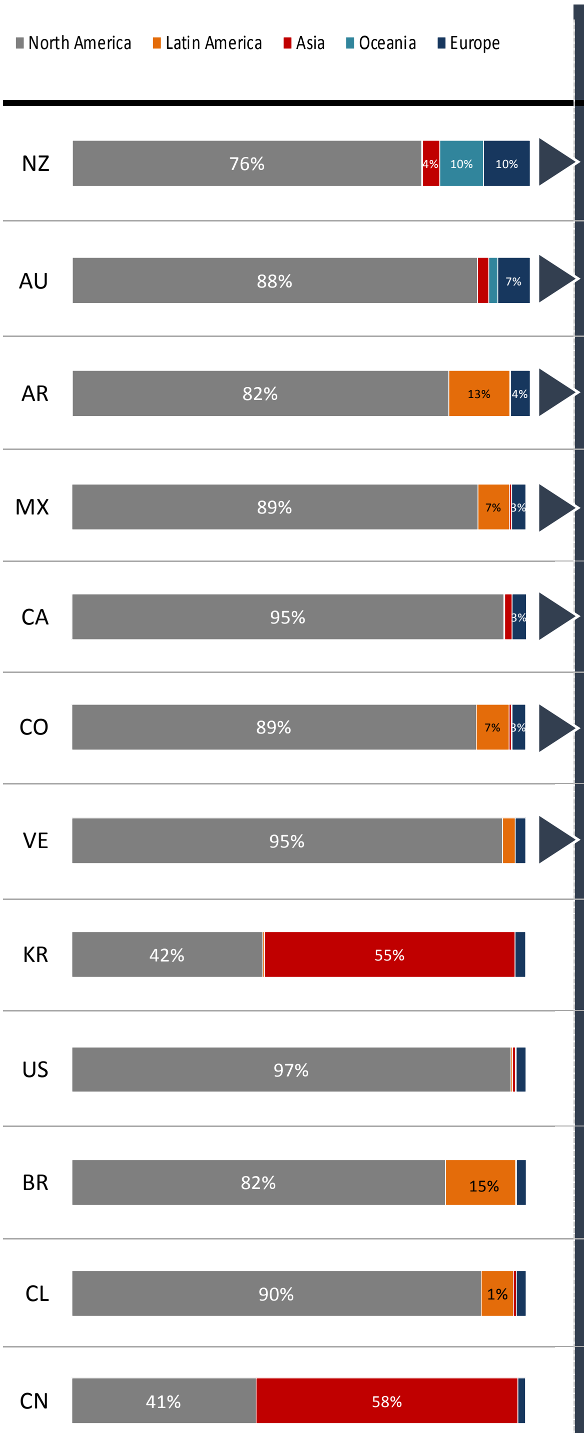
	2012	2013	2014	2015	2016	*Average*
Outside Europe	**5%**	**3%**	**3%**	**3%**	**2%**	**3%**
US & CA	**5%**	**3%**	**2%**	**3%**	**2%**	**3%**
Latin America	**6%**	**4%**	**4%**	**5%**	**3%**	**4%**
AU & NZ	**8%**	**6%**	**8%**	**5%**	**8%**	**7%**
CN & KR	**4%**	**2%**	**2%**	**2%**	**2%**	**2%**
CA	5%	3%	3%	4%	3%	3%
US	5%	3%	2%	3%	2%	3%
AR	9%	6%	4%	6%	4%	6%
BR	5%	4%	4%	5%	2%	4%
CL	4%	4%	3%	4%	2%	3%
CO	8%	5%	5%	6%	3%	5%
MX	7%	3%	4%	5%	3%	4%
VE	5%	2%	2%	5%	2%	3%
AU	7%	5%	8%	5%	7%	6%
NZ	9%	10%	10%	8%	10%	9%
CN	3%	2%	2%	2%	2%	2%
KR	6%	3%	4%	3%	2%	4%

Source: European Audiovisual Observatory / LUMIERE, comScore

Where did European films generate the highest market share?

Figure 11. Market shares in terms of admissions - by region / country of origin 2016 (estimated)

Markets ranked by market share of European films.



	EUR films	GB	FR	RU	BE	ES	IE	DE	Other
NZ	10%	88%	1%	-	1%	1%	2%	2%	5%
AU	7%	86%	5%	0%	0%	1%	1%	0%	7%
AR	4%	25%	17%	0%	4%	35%	1%	3%	16%
MX	3%	43%	17%	0%	3%	20%	1%	6%	11%
CA	3%	73%	14%	3%	4%	0%	2%	0%	3%
CO	3%	35%	28%	4%	1%	8%	2%	7%	14%
VE	2%	31%	21%	11%	4%	12%	-	1%	20%
KR	2%	54%	4%	1%	3%	2%	12%	4%	21%
US	2%	70%	13%	4%	3%	0%	5%	0%	5%
BR	2%	39%	16%	7%	6%	15%	3%	4%	9%
CL	2%	39%	11%	4%	9%	12%	-	4%	21%
CN	2%	35%	31%	19%	10%	-	3%	2%	0%

Source: European Audiovisual Observatory / LUMIERE, comScore

4.3. GBO to European films outside Europe

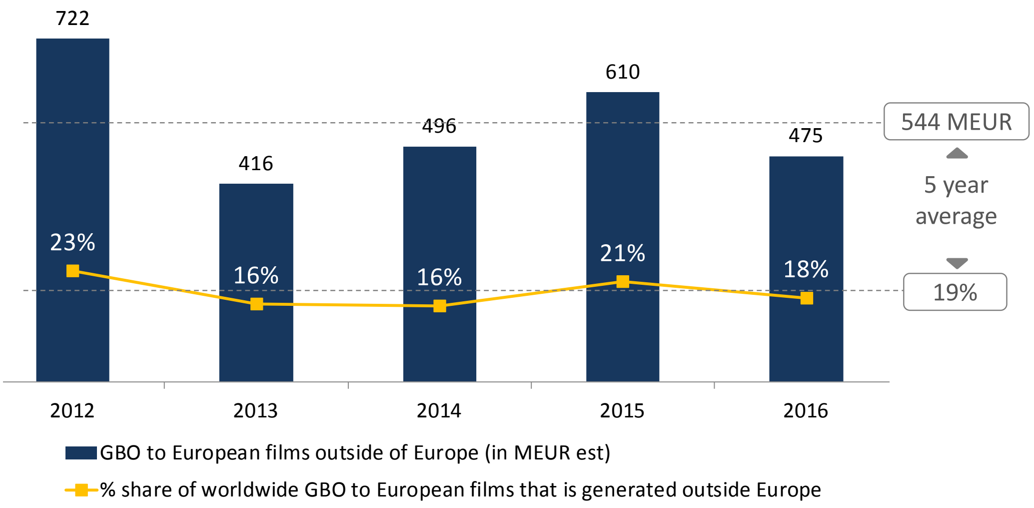
European films generated an estimated GBO of EUR 475 million outside Europe in 2016

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

Applying average ticket prices for the individual markets, European films generated an estimated gross box office (GBO) of about EUR 475 million outside Europe (see Figure 12). This means that cumulatively European films earned an estimated 18% of their "worldwide" box office in 2016 outside Europe.

Figure 12. GBO to European films outside Europe 2016 (in MEUR)

Cumulative GBO to European films outside Europe. Includes pro-forma estimates for China for 2012 and 2013 otherwise as tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, comScore

The importance of the North American market for European films is even more pronounced in terms of box office takings than it is in terms of admissions. With an estimated MEUR 231 the North American market accounted for 49% of total non-European GBO. China and South Korea contributed about one quarter of total GBO (MEUR 125), followed by Australia and New Zealand with cumulative GBO takings of MEUR 65 (14%), ahead of the Latin American sample markets with cumulative estimated GBO takings of MEUR 52 (11%).

Table 10 overleaf shows the five year development of GBO in the individual non-European markets and illustrates the pronounced decline of GBO to European films in North and Latin American markets. See chapter 7 for further details on the importance of individual non-European territories.

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 as shown in Table 8 in chapter 4.2.

Table 10. GBO to European films on release outside Europe 2012-2016 (in MEUR)

Estimates calculated by applying local average ticket prices to admissions as tracked in LUMIERE except for pro-forma estimates for China for 2012 and 2013.

	2012	2013	2014	2015	2016	*Average*
Outside Europe	**722**	**416**	**496**	**610**	**475**	**544**
US & CA	**420**	**224**	**222**	**319**	**231**	**283**
Latin America	**108**	**62**	**80**	**100**	**53**	**81**
AU & NZ	**72**	**41**	**67**	**44**	**65**	**58**
CN & KR	**122**	**90**	**126**	**146**	**125**	**122**
CA	41	21	24	32	28	29
US	379	203	197	287	204	254
AR	17	11	8	12	10	12
BR	28	21	30	30	14	25
CL	3	3	3	5	2	3
CO	10	7	8	10	5	8
MX	42	20	30	41	22	31
VE	8	1	1	3	1	3
AU	60	33	58	36	53	48
NZ	11	7	9	8	12	10
CN est	*60*	*53*	*80*	115	97	81
KR	62	37	46	31	28	41

Source: European Audiovisual Observatory / LUMIERE, comScore

5. BREAKING IT DOWN...

5.1. The most important theatrical markets for European films outside Europe

In terms of number of releases

As first releases cumulatively accounted for 98% of total admissions to European films outside Europe, it makes sense to analyse non-European markets in terms of European first releases and films on release separately. As can be seen in Table 11 overleaf, Brazil, the US and Mexico stand out with between 144 and 111 European films being released for the first time in 2016 in their respective territories. Other countries with a comparatively large number of European first releases include Argentina (94), Colombia (89), Australia (83) and South Korea (81). The strongly regulated Chinese market as well as Venezuela featured the lowest number of European first releases with only 27 respectively 25 European first releases tracked in 2016.

Given the comparatively low number of holdovers / re-releases / on-demand screenings / festival releases etc. tracked in the data set[10] , the picture is quite similar in terms of the total number of films on release: the Brazil, the US and Mexico stand out with 195 to 161 European films on release, followed by Colombia, Australia and Argentina with around 120 European films on release. Again, China and Venezuela rank lowest with only 37 and 36 European films on release in 2016.

In terms of admissions and GBO

Not surprisingly, the North American market is also by far the most important overseas market for European films in terms of admissions. In 2016 an estimated 26.2 and 3.5 million tickets were sold to European films in the US and Canada respectively. The US market hence represents the single largest market for European films, accounting for 32% of total admissions to European films outside Europe. The Canadian market accounted for 4%, so that cumulatively 36% of total non-European admissions were generated in the US and Canada (see Table 12 overleaf). Despite the very limited number of European releases on its territory, China clearly came in as the second largest market for European films in terms of admissions with 21.2 million tickets sold in 2016, accounting for 26% of total admissions to European films in the 12 markets covered.

[10] Which can either indicate a lower offer of “repertoire” films outside of Europe and / or less comprehensive coverage of these films with regard to data collection.

Mexico, Australia, and South Korea follow with admissions between 10.0 and 5.5 million while European films sold 3.7 million or fewer tickets in any the remaining five Latin American markets, Canada and New Zealand.

Table 11. Number of European film releases outside Europe 2016

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

#	Market	First releases (estimated)	Other releases[1] (estimated)	Films on release
1	BR - Brazil	**144**	51	195
2	US - USA	**132**	42	174
3	MX - Mexico	**111**	50	161
4	AR - Argentina	**94**	23	125
5	CO - Colombia	**89**	36	120
6	AU - Australia	**83**	37	117
7	KR - South Korea	**81**	16	97
8	CA - Canada	**71**	17	88
9	NZ - New Zealand	**63**	11	74
10	CL - Chile	**49**	9	58
11	CN - China	**27**	10	37
12	VE - Venezuela	**25**	11	36
	Total Outside Europe	**475**	**175**	**650**

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

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 12. Admissions & GBO for European films outside Europe 2016

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

#	Market	Adm to First Releases	Adm to Other Releases	Total Adm	%	GBO (in MEUR)	%
	US & CA	24.5	5.3	**29.8**	***36%***	**231**	***49%***
	Latin America	17.5	1.0	**18.6**	***23%***	**53**	***11%***
	AU & NZ	7.0	0.4	**7.4**	***9%***	**65**	***14%***
	CN & KR est	25.1	0.7	**25.8**	***32%***	**125**	***26%***
1	US - USA	21.7	4.5	**26.2**	***32%***	**204**	**43%**
2	CN - China	21.1	0.0	**21.2**	***26%***	**97**	**20%**
3	MX - Mexico	9.3	0.7	**10.0**	***12%***	**22**	**5%**
4	AU - Australia	5.6	0.3	**5.9**	***7%***	**53**	**11%**
5	KR - South Korea	4.0	0.7	**4.7**	***6%***	**28**	**6%**
6	BR - Brazil	3.6	0.1	**3.7**	***5%***	**14**	**3%**
7	CA - Canada	2.7	0.8	**3.5**	***4%***	**28**	**6%**
8	AR - Argentina	2.0	0.0	**2.0**	***3%***	**10**	**2%**
9	CO - Colombia	1.7	0.1	**1.8**	***2%***	**5**	**1%**
10	NZ - New Zealand	1.4	0.1	**1.5**	***2%***	**12**	**3%**
11	CL - Chile	0.5	0.0	**0.6**	***1%***	**2**	**1%**
12	VE - Venezuela	0.4	0.1	**0.4**	***1%***	**1**	**0%**
	Outside Europe	**80.0**	**1.6**	**81.6**	***100%***	**475**	***100%***

Source: European Audiovisual Observatory, comScore

In terms of GBO

Thanks to a comparatively high average ticket price, the importance of the North American market is even more pronounced in terms of gross box office takings. Based on the data available, the Observatory estimates that European films took MEUR 204 and MEUR 28 at the US and Canadian box offices respectively, accounting for a cumulative 49% of total non-European GBO takings. In other words, every other Euro grossed by European films outside Europe was earned on the two North American markets. About MEUR 97 were generated in China, followed by Australia (MEUR 53), Canada (MEUR 28) and South Korea (MEUR 28).

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

In terms of releases

In 2016, as in past years, France and the UK exported by far the largest number of films to non-European territories among the European countries. As shown in Table 13 overleaf, France leads both in terms of first releases as well as total films on release with 136 French first releases throughout the year and a total of 194 French films on release in at least one of the 12 non-European markets covered in this report. France is followed by the UK with 89 first releases outside Europe and a total of 125 films on release. On a cumulative basis French and UK films accounted for 49% of the total number of European films on release outside Europe. In other words, like in 2015, one out of two European films screened outside Europe in 2016 were majority produced in either France or the UK.

Spain ranked third in 2016 with 45 first releases and a total of 59 films on release, followed closely by Italy and Germany with 41 and 36 first releases and a total 58 and 49 films on release respectively. In addition, two Scandinavian countries (Sweden, Norway) as well as the Netherlands, Ireland, Belgium and Russia made it onto the top 10 list of European film export countries with 15 to 11 films on release outside Europe in 2016. On a cumulative level these eleven top ranking countries accounted for 85% of the total number of European films on release outside Europe.

In terms of admissions

The picture is even more concentrated when it comes to admissions generated by European films: On a cumulative level UK and French films accounted for 72% of total admissions to European films outside Europe in 2016, significantly down from 87% in 2016.

Accounting for 8 out of the top 10 European export films in 2016, UK films clearly dominated European film exports outside Europe in 2016 and overtook France as the most successful film exporter in terms of admissions. Led by *Bridget Jones’s Baby* (6.4 million admissions), *Sherlock: The Abominable Bride* (5.6 million) and *Florence Foster Jenkins* (3.9 million), UK films cumulatively sold 44.5 million tickets outside Europe and accounted for 55% of total admissions to European films outside Europe (see Table 14).

Led by Europacorp’s *Nine Lives* (7.2 million)French films came in second place, with 14.1 million admissions, accounting for 17% of total admissions to European films. France was followed at a distance by Russia whose productions cumulatively generated 5.5

million ticket sales in 2016 (7%) ahead of Belgium (4.1 million), Spain (3.7 million) and Ireland (3.0 million).

A list of the top 100 European films in terms of admissions generated outside Europe in 2016 is shown in chapter 5.5.

Table 13. Number of European film releases outside Europe by country of origin 2016

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

Rank	Country of origin	First release (estimated)	Other releases (estimated)	Films on release outside Europe	% share
1	FR - France	136	58	**194**	**30%**
2	GB - United Kingdom	89	36	**125**	**19%**
3	ES - Spain	45	14	**59**	**9%**
4	IT - Italy	41	17	**58**	**9%**
5	DE - Germany	36	13	**49**	**8%**
6	RU - Russia	12	3	**15**	**2%**
	BE - Belgium	11	4	**15**	**2%**
8	NL - Netherlands	12	1	**13**	**2%**
9	SE - Sweden	8	4	**12**	**2%**
10	NO - Norway	10	1	**11**	**2%**
	IE - Ireland	11		**11**	**2%**
12	PT - Portugal	5	5	**10**	**2%**
	DK - Denmark	8	2	**10**	**2%**
14	CH - Switzerland	6	2	**8**	**1%**
15	CZ - Czech Republic	5	1	**6**	**1%**
	RO - Romania	6		**6**	**1%**
17	FI - Finland	3	2	**5**	**1%**
	AT - Austria	5		**5**	**1%**
	HU - Hungary	4	1	**5**	**1%**
	TR - Turkey	3	2	**5**	**1%**
21	PL - Poland	3	1	**4**	**1%**
	GR - Greece	4		**4**	**1%**
23	IS - Iceland	3		**3**	**0%**
24	EE - Estonia	2		**2**	**0%**
	GE - Georgia	1	1	**2**	**0%**
	UA - Ukraine	1	1	**2**	**0%**
	LT - Lithuania	1	1	**2**	**0%**
	BG - Bulgaria	1	1	**2**	**0%**
29	RS - Serbia		1	**1**	**0%**
	HR - Croatia	1		**1**	**0%**
	BY - Belorussia		1	**1**	**0%**
	MT - Malta		1	**1**	**0%**
	BA - Bosnia Herzegovina		1	**1**	**0%**
	AM - Armenia	1		**1**	**0%**
	LU - Luxembourg	1		**1**	**0%**
	Total Europe	**475**	**175**	**650**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 14. Admissions to European films outside Europe by country of origin 2016

Ranked by total admissions outside Europe as tracked in LUMIERE.

Rank	Country of origin	Admissions to First Releases (estimated)	Admissions to Other releases (estimated)	Admissions outside Europe	% share
1	GB - United Kingdom	44 355 012	220 425	44 575 437	55%
2	FR - France	13 691 779	438 313	14 130 092	17%
3	RU - Russia	5 422 629	91 291	5 513 920	7%
4	BE - Belgium	4 071 534	1 398	4 072 932	5%
5	ES - Spain	3 645 030	20 027	3 665 057	4%
6	IE - Ireland	3 015 669		3 015 669	4%
7	DE - Germany	1 441 306	181 188	1 622 494	2%
8	IT - Italy	1 459 225	28 476	1 487 701	2%
9	SE - Sweden	528 873	642 485	1 171 358	1%
10	NO - Norway	824 602	36	824 638	1%
11	HU - Hungary	359 475	158	359 633	0%
12	CZ - Czech Republic	298 089	839	298 928	0%
13	AT - Austria	178 282		178 282	0%
14	NL - Netherlands	169 924	3	169 927	0%
15	IS - Iceland	115 211		115 211	0%
16	GR - Greece	109 399		109 399	0%
17	FI - Finland	91 635	851	92 486	0%
18	DK - Denmark	66 550	1 590	68 140	0%
19	RO - Romania	37 324		37 324	0%
20	EE - Estonia	34 652		34 652	0%
21	PL - Poland	17 248	12 382	29 630	0%
22	CH - Switzerland	15 098	400	15 498	0%
23	HR - Croatia	10 954		10 954	0%
24	PT - Portugal	3 070	6 559	9 629	0%
25	GE - Georgia	4 674	481	5 155	0%
26	BG - Bulgaria	3 762	1 004	4 766	0%
27	UA - Ukraine	2 480	17	2 497	0%
28	LT - Lithuania	950	391	1 341	0%
29	TR - Turkey	958	106	1 064	0%
30	LU - Luxembourg	628		628	0%
31	BA - Bosnia Herzeg.		411	411	0%
32	AM - Armenia	259		259	0%
33	MT - Malta		222	222	0%
34	RS - Serbia		107	107	0%
35	BY - Belorussia		4	4	0%
	Total Europe	**79 976 281**	**1 649 164**	**81 625 445**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

In terms of "importance" of non-European markets

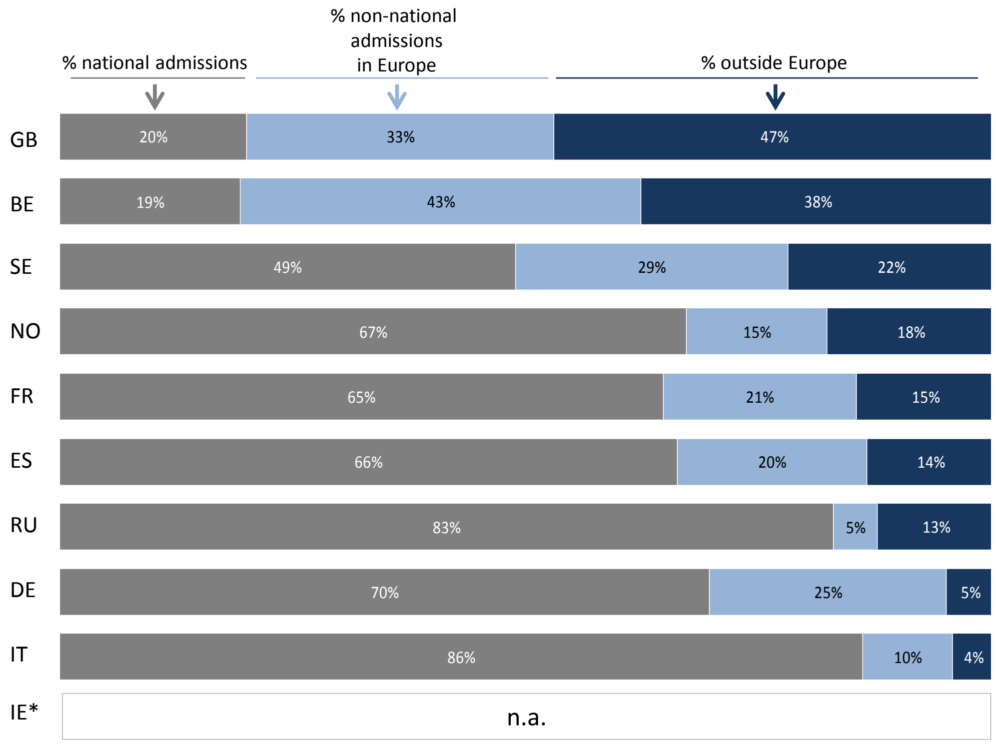
How important are admissions outside Europe for the various European countries? Figure 13 shows the percentage shares of admissions in national, non-national European and non-European markets for each of the top 10 European film exporting countries in terms of admissions outside Europe as identified in Table 14 on the previous page. The complete breakdown for all European countries can be found in Table 15 overleaf.

In 2016, two out of the top 10 European film exporting countries generated more than a third of their total theatrical admissions on the 12 non-European markets covered in this report: generating almost half of its worldwide ticket sales (47%) outside of Europe, the UK clearly had the highest "exposure to non-European markets, followed by Belgium whose film productions generated 38% of their worldwide admissions outside Europe, largely thanks to Robinson Crusoe (BE/FR) which became Europe's fifth most successful export film outside Europe in 2016 (3.5 million admission).

Sweden and Norway sold 22% and 18% of their worldwide admissions outside Europe, while non-European markets accounted between 15% (FR) and 4% (IT) for all other top European film exporting countries as illustrated in Figure 13.

Figure 13. Breakdown of "worldwide" admissions to the top 10 European film exporting countries by origin of admissions generation 2016 (estimated)

Ranked by share of admissions outside Europe.



* 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. National and non-national admissions can hence not be calculated in a reliable manner.

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 15. Admissions breakdown for European films 2016 – "national" vs. "non-national"

As tracked in LUMIERE. Ranked alphabetically. Estimated.

Country of origin		% Share – National adm	% Share- Non-nat. adm	*% Share – Non-nat. adm in Europe*	*% Share – Non-nat. adm outside Europe*
AT	Austria	**40%**	**60%**	46%	14%
BE	Belgium	**19%**	**81%**	43%	38%
BG	Bulgaria	**93%**	**7%**	5%	3%
CH	Switzerland	**37%**	**63%**	62%	1%
CZ	Czech Republic	**78%**	**22%**	17%	5%
DE	Germany	**70%**	**30%**	25%	5%
DK	Denmark	**72%**	**28%**	27%	2%
EE	Estonia	**77%**	**23%**	15%	8%
ES	Spain	**66%**	**34%**	20%	14%
FI	Finland	**87%**	**13%**	9%	4%
FR	France	**65%**	**35%**	21%	15%
GB	United Kingdom	**20%**	**80%**	33%	47%
GE	Georgia	**68%**	**32%**	16%	16%
GR	Greece	**73%**	**27%**	19%	9%
HR	Croatia	**59%**	**41%**	36%	5%
HU	Hungary	**36%**	**64%**	37%	27%
IS	Iceland	**11%**	**89%**	74%	15%
IT	Italy	**86%**	**14%**	10%	4%
LT	Lithuania	**96%**	**4%**	4%	0%
LV	Latvia	**93%**	**7%**	7%	0%
ME	Montenegro	**100%**	**0%**	0%	0%
NL	Netherlands	**90%**	**10%**	6%	4%
NO	Norway	**67%**	**33%**	15%	18%
PL	Poland	**96%**	**4%**	4%	0%
PT	Portugal	**80%**	**20%**	17%	2%
RO	Romania	**50%**	**50%**	45%	4%
RU	Russia	**83%**	**17%**	5%	13%
SE	Sweden	**49%**	**51%**	29%	22%
SI	Slovenia	**97%**	**3%**	3%	0%
SK	Slovak Rep.	**84%**	**16%**	16%	0%
TR	Turkey	**97%**	**3%**	3%	0%
	Total Europe	**60%**	**40**	***20%***	***19%***

Remark: This breakdown cannot be provided for the following countries due to a lack of (sufficient) 2016 admissions data in their respective home markets in the LUMIERE database: Bosnia-Herzegovina (BA), Belarus (BY), Cyprus (CY), Georgia (GE), Ireland (IE), Luxemburg (LU), Lichtenstein (LI), Montenegro (ME), FYROM (MK), Malta (MT), Serbia (RS), Ukraine (UA)

Source: European Audiovisual Observatory / LUMIERE, comScore

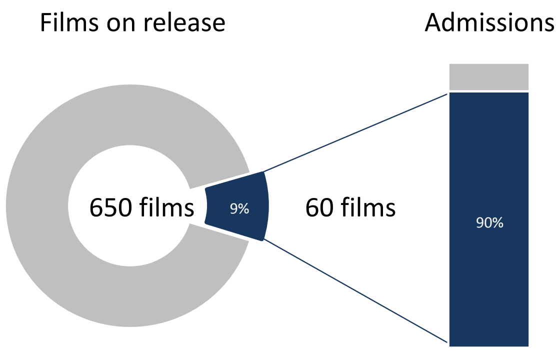
5.3. Concentration of admissions outside Europe

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

As shown in Figure 14, 60 films, i.e. only 9% of the 650 films on release, accounted for 90% of total admissions generated by European films outside Europe in 2016. In other words, nine out of ten tickets sold for European films outside Europe were sold for a screening of one of only 60 European films, which cumulatively generated 73.1 million ticket sales. The remaining 590 European films on release (91% of the total number of European films on release outside Europe) cumulatively generated only 8.5 million admissions.

Figure 14. Concentration of admissions to European films outside Europe 2016

As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, comScore

82% of European films generated fewer than 50 000 ticket sales outside Europe in 2016

Yet another way to look at the concentration of admissions among the various European films is to count the number of films by admissions brackets. As can be seen in Table 16 overleaf, eight out of ten European films (82%) generated fewer than 50 000 admissions outside Europe and one in three European film exports (31%) even sold less than 1 000 tickets outside Europe in 2016.

Compared to 2015, the number of European "blockbuster" films which managed to sell more than five million tickets outside Europe dropped from six to three films. The time series depicted in Table 17 suggests that the years 2012 and 2015 with six such European blockbusters are exceptional while in an average year, this number ranges between one and three films.

On the other hand, 2016 featured an exceptionally high number of European films selling between one and five million admissions (16 films) as another 18 films sold between 500 000 and one million tickets. These are the highest number of films in these admissions brackets in the past five years.

Table 16. Number and admissions of European films by „admissions brackets“ 2016

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

Admissions bracket	Number of films	% share	Cumulative admissions outside Europe (in mio)	% share	Average admissions within bracket
[5 mio - [	3	0%	19.2	24%	6.4 mio
[1 mio - 5 mio[	16	2%	34.5	42%	2.2 mio
[500' - 1 mio[	18	3%	11.8	14%	657 000
[100' - 500'[	44	7%	10.4	13%	237 000
[50' - 100'[	33	5%	2.4	3%	72 000
[10' - 50'[	112	17%	2.4	3%	21 000
[1' - 10'[	220	34%	0.9	1%	4 000
[1 - 1'[	204	31%	0.1	0%	320
Grand total	**650**	**100%**	**81.6**	**100%**	**126 000**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 17. Number of European films by „admissions brackets“ 2012-2016

As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Admissions bracket	2012	2013	2014	2015	2016	5 year average
[5 mio - [	6	3	1	6	3	4
[1 mio - 5 mio[	10	9	12	8	16	11
[500' - 1 mio[	12	8	13	13	18	13
[100' - 500'[	46	36	49	41	44	43
[50' - 100'[	30	34	29	40	33	33
[10' - 50'[	103	110	113	113	112	110
[1' - 10'[	184	206	210	191	220	202
[1 - 1'[	118	160	162	187	204	166
Grand total	**509**	**566**	**589**	**599**	**650**	**583**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 18. Admissions to European films by „admissions brackets“ 2012-2016 – in million

As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Admissions bracket	2012	2013	2014	2015	2016	5 year average
[5 mio - [	72.0	23.0	31.9	66.8	19.2	42.6
[1 mio - 5 mio[	22.3	25.3	24.6	15.6	34.5	24.5
[500' - 1 mio[	7.8	5.7	8.8	8.9	11.8	8.6
[100' - 500'[	9.8	7.9	11.2	10.5	10.4	10.0
[50' - 100'[	2.1	2.3	2.1	2.8	2.4	2.3
[10' - 50'[	2.6	2.6	2.6	2.6	2.4	2.6
[1' - 10'[	0.7	0.8	0.8	0.7	0.9	0.8
[1 - 1'[	0.0	0.1	0.1	0.1	0.1	0.1
Grand total	**117.5**	**67.7**	**82.0**	**108.2**	**81.6**	**91.4**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 19. Admissions to European films by „admissions brackets“ 2012-2016 – in %

As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Admissions bracket	2012	2013	2014	2015	2016	5 year average
[5 mio - [	61%	34%	39%	62%	24%	44%
[1 mio - 5 mio[	19%	37%	30%	14%	42%	29%
[500' - 1 mio[	7%	8%	11%	8%	14%	10%
[100' - 500'[	8%	12%	14%	10%	13%	11%
[50' - 100'[	2%	3%	3%	3%	3%	3%
[10' - 50'[	2%	4%	3%	2%	3%	3%
[1' - 10'[	1%	1%	1%	1%	1%	1%
[1 - 1'[	0%	0%	0%	0%	0%	0%
Grand total	**117.5**	**67.7**	**82.0**	**108.2**	**81.6**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

Admission concentration on top 10 films drops from 71% to 59% in 2016

Another way to measure admission concentration levels is shown in Table 20 which measures cumulative market share for various „top brackets“: With “only” 7.2 million admissions *Nine Lives*, the most successful European film outside Europe in 2016, accounted on its own for 9%r of cumulative admissions to European films in the 12 non-European markets covered. The top 10 films (2% of the European films on release outside Europe) cumulatively accounted for 50% of total admissions, the top 50 films for 87% and the top 100 films for 95%.

As shown in Table 21 these concentration levels are significantly lower in 2016 compared to the preceding four years. This is particularly true for the concentration of admissions on the top ranking film and the top 10 performing titles. Accounting for only 9% of total admissions outside Europe and selling 7.2 million tickets, *Nine Lives*, is the top ranking film with the weakest performance in the past five years: In 2014 *Lucy* (FR) sold 31.9 million tickets outside Europe and accounted for 39% of total admissions to European films outside Europe. In 2012, *Taken 2* (FR) sold 26.8 million tickets (23%) and in 2015 *Taken 3* (FR) generated 25.6 million admissions (24%).

2016 was hence a year with a comparatively diversified distribution of admissions with more films generating more admissions from their theatrical release outside Europe.

Given the comparatively low number of European films on release outside Europe, the concentration level is nevertheless naturally significantly higher compared to the European market where the top 100 films accounted for an estimated 57% of total European admissions. The two can therefore not be directly compared.

Table 20. Concentration of admissions to European films by „top brackets“ 2016

As tracked in LUMIERE. Cumulative admissions indicated in million.

Top bracket	Number of films	% share	Cumulative admissions outside Europe	% share
Top 1	1	0%	7.2	9%
Top 10	10	2%	41.2	50%
Top 50	50	8%	70.6	87%
Top 100	100	15%	77.5	95%
Other	550	85%	4.1	5%
Total	**650**	**100%**	**81.6**	**100%**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 21. Admissions to European films by „top brackets“ 2012-2016 – in %

As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Admissions bracket	2012	2013	2014	2015	2016	5 year average
Top 1	23%	14%	39%	24%	9%	22%
Top 10	71%	67%	65%	71%	50%	65%
Top 50	92%	90%	89%	92%	87%	90%
Top 100	97%	95%	96%	96%	95%	96%
Other	3%	5%	4%	4%	5%	4%
Total (in mio)	**117.5**	**67.7**	**82.0**	**108.2**	**81.6**	**91.4**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 22. Admissions to European films by „top brackets“ 2012-2016 – in million

As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Admissions bracket	2012	2013	2014	2015	2016	5 year average
Top 1	26.8	9.6	31.9	25.6	7.2	20.2
Top 10	83.7	45.6	53.1	76.9	41.2	60.1
Top 50	108.5	61.3	72.7	99.1	70.6	82.5
Top 100	113.9	64.7	78.4	104.3	77.5	87.7
Other	3.5	3.1	3.7	3.8	4.1	3.6
Total	**117.5**	**67.7**	**82.0**	**108.2**	**81.6**	**91.4**

Source: European Audiovisual Observatory / LUMIERE, comScore

5.4. Diversity of European film offering outside Europe

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

European film portfolio varies significantly from one market to the next

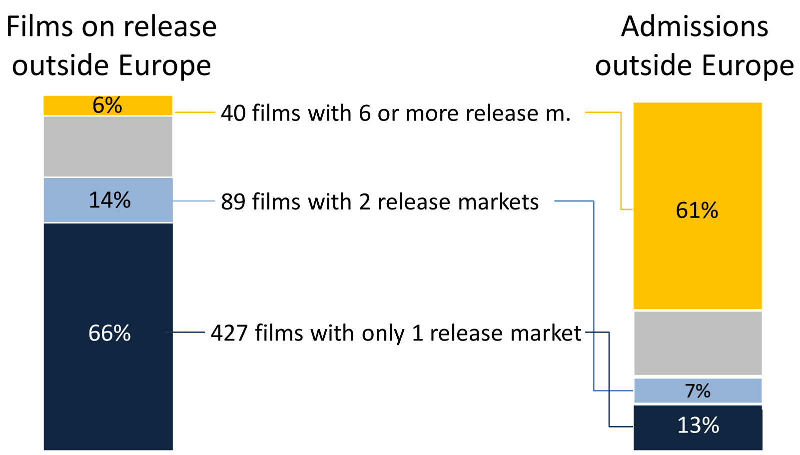
As illustrated in Figure 15 and Table 23 overleaf, 66% of the 650 European films on theatrical release outside Europe in 2016 were screened in only one single territory (427 films). Another 86 films (14%) were on release only in two markets.

On the other hand a total of only 40 European films (6%) were on release six or more non-European markets in 2016. This is the second highest level observed in the past five years (see Table 24). These 40 films cumulatively accounted for 61% of the total admissions to European films outside Europe.

These figures suggest that – even though growing - only a very small number of European films manage to be released in a large number of non-European territories while the vast majority of films were released in only one or two markets. This means that the portfolio of European films on release outside Europe actually varies to a large extent from one territory to another.

Figure 15. Share of European films with only 1 or 2 non-European release markets 2016

As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, comScore

Table 23. Concentration of European films outside Europe by number of release markets 2016

As tracked in LUMIERE.

Nr. of non-European release markets	European films	% share	Cumulative admissions	% share	Average admissions
1	427	66%	10.3	13%	24 000
2	89	14%	5.4	7%	61 000
3	53	8%	4.5	6%	86 000
4	21	3%	9.3	11%	441 000
5	20	3%	1.9	2%	96 000
6	8	1%	5.5	7%	686 000
7	8	1%	1.8	2%	226 000
8	5	1%	3.3	4%	660 000
9	7	1%	12.8	16%	1 830 000
10	6	1%	7.0	9%	1 163 000
11	5	1%	16.5	20%	3 297 000
12	1	0%	3.3	4%	3 264 000
Total	**650**	**100%**	**81.6**	**100%**	**126 000**
6 or more	**40**	**6%**	**50.1**	**61%**	**1 253 331**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 24. European film releases outside Europe by number of release markets 2012-2016

As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Nr. of non-European release markets	2012	2013	2014	2015	2016	5 year average
1	303	366	368	365	427	366
2	109	105	98	97	89	100
3	33	38	47	46	53	43
4	22	17	29	26	21	23
5	14	16	11	20	20	16
6	8	7	14	10	8	9
7	3	4	7	10	8	6
8	4	7	6	7	5	6
9	6	3	4	8	7	6
10	3	3	3	3	6	4
11	4	0	1	3	5	3
12	~	~	1	4	1	2
Total	**509**	**566**	**589**	**599**	**650**	**583**
6 or more	**28**	**24**	**36**	**45**	**40**	**35**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 25. Admissions to European films outside Europe by number of release markets 2012-2016

In million. As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Nr. of non-European release markets	2012	2013	2014	2015	2016	5 year average
1	5.1	3.9	4.9	4.7	10.3	5.8
2	7.8	3.8	5.0	8.0	5.4	6.0
3	4.2	2.7	7.6	3.0	4.5	4.4
4	21.3	4.2	5.6	1.5	9.3	8.4
5	4.7	9.5	3.5	3.5	1.9	4.6
6	3.9	3.1	2.3	2.5	5.5	3.5
7	0.9	10.3	3.0	12.9	1.8	5.8
8	1.4	15.6	4.2	3.9	3.3	5.7
9	9.3	2.9	6.5	9.7	12.8	8.3
10	20.9	11.7	3.7	8.4	7.0	10.4
11	37.7	0.0	3.7	4.2	16.5	12.4
12	~	~	31.9	45.9	3.3	27.0
Total	**117.5**	**67.7**	**82.0**	**108.2**	**81.6**	**91.4**
6 or more	**74.3**	**43.6**	**55.4**	**87.5**	**50.1**	**62.2**

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 26. Admissions to European films outside Europe by number of release markets 2012-2016

In %. As tracked in LUMIERE. Does not include data for CN in 2012 and 2013 (not available).

Nr. of non-European release markets	2012	2013	2014	2015	2016	5 year median
1	4%	6%	6%	4%	13%	6%
2	7%	6%	6%	7%	7%	7%
3	4%	4%	9%	3%	6%	4%
4	18%	6%	7%	1%	11%	7%
5	4%	14%	4%	3%	2%	4%
6	3%	5%	3%	2%	7%	3%
7	1%	15%	4%	12%	2%	4%
8	1%	23%	5%	4%	4%	4%
9	8%	4%	8%	9%	16%	8%
10	18%	17%	5%	8%	9%	9%
11	32%	0%	5%	4%	20%	5%
12	~	~	39%	42%	4%	39%
Total	**117.5**	**67.7**	**82.0**	**108.2**	**81.6**	**91.4**
6 or more	**63%**	**64%**	**68%**	**81%**	**61%**	**68%**

Source: European Audiovisual Observatory / LUMIERE, comScore

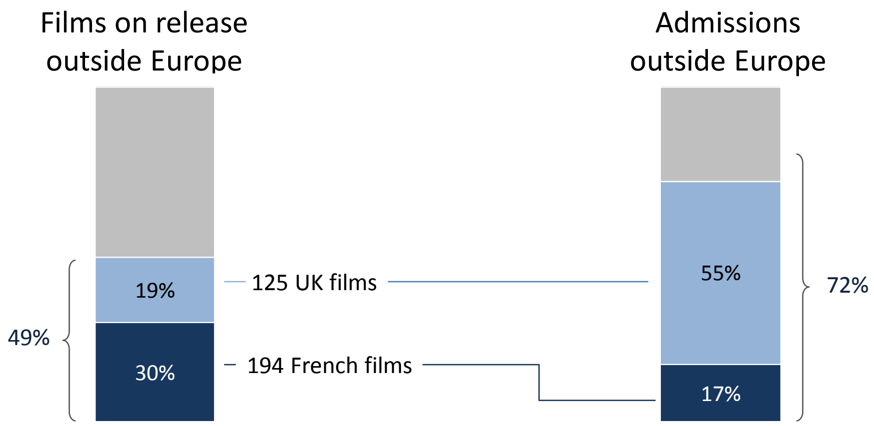
French and UK films represent majority of European "film exports" outside Europe

The breakdown of the number of European films on release as well as admissions to them by country of origin is already commented on in Chapter 5.2. In the context of looking into the "diversity" of the European theatrical film offering outside Europe it can be noted that France and the UK "exported" by far the largest number of films among the European countries and cumulatively accounted for every second European film (49%) screened outside Europe in 2016, as illustrated in Figure 16.

In terms of admissions UK and French films cumulatively accounted for 72% of total admissions to European films outside Europe in 2016. In other words, seven in ten tickets sold for European films were for UK or French films.

Figure 16. Share of French and UK films on non-European markets 2016

As tracked in LUMIERE. Estimated.



Source: European Audiovisual Observatory / LUMIERE, comScore

Recent productions account for 95% of admissions

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

As illustrated in Figure 17 and Table 27, recent productions, i.e. films produced in 2015 or 2016, accounted for "only" 58% of the European films on release but accounted for 95% of total admissions in 2016.

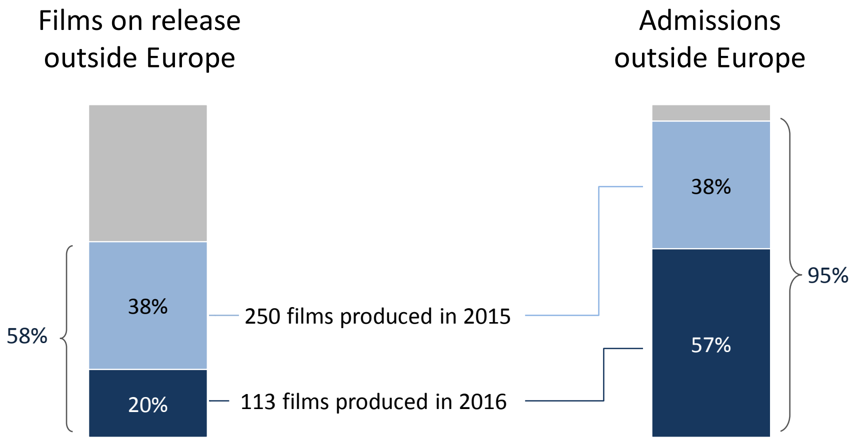
Three to five year old productions accounted for another 28% (178 films) of European films on release but cumulatively generated only about 4% of total admissions.

Another 89 European films on release outside Europe in 2016 were produced before or in 2010. These figures suggest that while the commercially relevant market is practically dominated by the export of recent productions, there appears to be a certain demand for screening a limited number of older European films which do not, however, generate large numbers of admissions.

The figures also show a certain time lag with a significant number of European films being released outside Europe one or two years after their production year.

Figure 17. Share of „recent“ European films on non-European release markets 2016

As tracked in LUMIERE. Estimated.



Source: European Audiovisual Observatory / LUMIERE, comScore

Table 27. Concentration of European films outside Europe by production year 2016

As tracked in LUMIERE. Estimated.

Production year	Films on release	%	Cumulative %	Admissions)	%	Cumulative %
2015	133	20%	20%	46 180 730	57%	57%
2014	250	38%	59%	31 366 474	38%	95%
2013	121	19%	78%	2 461 365	3%	98%
2012	45	7%	84%	428 930	1%	99%
2011	12	2%	86%	29 736	0%	99%
[2001-2010]	45	7%	93%	782 919	1%	100%
[1991-2000]	6	1%	94%	44 880	0%	100%
[1900-1990]	38	6%	100%	330 411	0%	100%
TOTAL	**650**	**100%**		**81 625 445**	**100%**	

Source: European Audiovisual Observatory / LUMIERE, comScore

5.5. Top 100 European films outside Europe

Table 28. Short profiles of top 5 European films outside Europe 2016

Admissions refer to cumulative admissions up until Dec 2015. „Int." stands for 12 non-European markets covered in this report.

1

Nine Lives **(2016)**
Country of origin: FR / CN / CA

Director: Barry Sonnenfeld

European admissions: 2.1 mio.

Int. admissions: 7.2 mio.

Int. release markets: 9

Genre: Comedy, Family, Drama

Language: English

Plot: A stuffy businessman finds himself trapped inside the body of his family's cat.

Remark: Europacorp production

2

Bridget Jones's Baby (2016)
Country of origin: GB / FR

Director: Sharon Maguire

European admissions: 18.0 mio.

Int. admissions: 6.4 mio.

Int. release markets: 11

Genre: Comedy, Romance

Language: English

Plot: Bridget's focus on single life and her career is interrupted when she finds herself pregnant, but with one hitch … she can only be fifty per cent sure of the identity of her baby's father.

3

Sherlock: The Abominable Bride **(2016)**
Country of origin: GB

Director: Douglas Mackinnon

European admissions: 0.1 mio.

Int. admissions: 5.6 mio.

Int. release markets: 4

Genre: Crime, Drama, Mystery

Language: English

Plot: Holmes and Watson must use all their cunning to combat an enemy seemingly from beyond the grave and the final, shocking truth about...the Abominable Bride!

Remark: Christmas special of the BBC TV series *Sherlock*

4

Florence Foster Jenkins **(2016)**
Country of origin: GB

Director: Stephen Frears

European admissions: 2.3 mio.

Int. admissions: 3.9 mio.

Int. release markets: 9

Genre: Biography, Comedy, Drama

Language: English

Plot: The story of Florence Foster Jenkins, a New York heiress who dreamed of becoming an opera singer, despite having a terrible singing voice.

5

Robinson Crusoe (2016)
aka The Wild Life
Country of origin: BE / FR

Directors: Vincent Kesteloot , Ben Stassen , Mimi Maynard

European admissions: 3.1 mio.

Int. admissions: 3.5 mio.

Int. release markets: 11

Genre: Animation, Adventure, Comedy

Language: English

Plot: A daring parrot recounts how Robinson Crusoe came to be stranded on a tropical island.

Source: European Audiovisual Observatory / LUMIERE, comScore, IMDB

Table 29. Top 100 European films in terms of admissions generated outside Europe 2016 (est)

N°	Film	Countries of origin	Prod. year	# of release markets	Adm. 2016 outside Europe	Adm. 2016 US/CA	Adm. 2016 Latin America	Adm. 2016 AU/NZ	Adm. 2016 CN/KR
1	Nine Lives	FR / CN / CA	2016	9	7 230 958	2 290 701	1 120 296		3 819 961
2	Bridget Jones's Baby	GB / US / FR	2016	11	6 404 369	2 820 048	1 313 728	1 449 960	820 633
3	Sherlock: The Abominable Bride	GB	2016	4	5 557 542		12 808	103	5 544 631
4	Florence Foster Jenkins	GB	2016	9	3 933 381	3 184 158	276 350	334 084	138 789
5	Robinson Crusoe	BE / FR	2016	11	3 449 340	930 881	613 847	36 832	1 867 780
6	Eddie the Eagle	GB INC / US	2016	12	3 263 533	1 835 974	355 471	637 406	434 682
7	Brooklyn	GB / IE / CA	2015	10	3 147 119	2 181 249	384 393	531 177	50 300
8	The Danish Girl	GB / US / BE /DK/ DE	2015	11	3 144 131	768 322	2 005 545	238 122	132 142
9	Eye in the Sky	GB	2015	11	2 952 025	2 174 952	488 384	274 339	14 350
10	The Lady in the Van	GB	2015	6	2 089 887	1 159 709	45 121	885 057	
11	Carol	GB / US / AU	2015	10	1 912 841	1 036 087	330 867	231 558	314 329
12	Love & Friendship	GB / IE / FR / NL	2016	8	1 896 813	1 629 833	55 190	205 592	6 198
13	On - drakon	RU	2015	1	1 838 258				1 838 258
14	Absolutely Fabulous: The Movie	GB INC / US	2016	4	1 253 617	554 901		698 716	
15	Bastille Day	GB INC / US	2016	10	1 213 284	5 845	582 243	45 692	579 504
16	Le Paon de Nuit	FR / CN	2015	1	1 164 095				1 164 095
17	Hardcore Henry	RU / US	2015	6	1 154 006	1 075 817	32 043		46 146
18	Sing Street	IE / GB / US	2016	6	1 042 558	376 408	42 746	65 069	558 335
19	The Lobster	IE / FR / GB / NL / GR	2015	4	1 033 371	1 011 671	21 344		356
20	Ekipazh	RU / KH	2016	2	884 116		7 831		876 285
21	Loving	GB / US	2016	2	861 550	861 550			
22	Atrapa la bandera	ES	2015	7	777 463		734 505		42 958
23	A Hologram for the King	GB / FR / DE / US/MX	2016	6	758 574	489 824	266 113	2 637	
24	Bølgen	NO	2015	8	716 825	20 628	680 560		15 637
25	Warrior's Gate	FR / CN	2016	1	708 985				708 985
26	45 Years	GB	2015	9	658 989	477 399	67 020	92 456	22 114
27	Mafiya: Igra na vyzhivanie	RU	2016	1	651 786				651 786
28	Missing Boy	SE	2001	1	634 756				634 756
29	Les nouvelles aventures d'Aladin	FR / BE	2015	1	633 788				633 788
30	Summer Camp	ES / US	2015	3	632 042		630 993		1 049
31	Thomas & Friends: Sodor's …	GB	2015	1	615 304				615 304
32	Mortadelo y Filemón contra …	ES	2014	3	582 962		582 962		
33	Quackerz	RU / US / CN	2016	1	564 486				564 486
34	Song of the Sea	IE / LU / BE / FR / DK	2014	2	542 544				542 544
35	Ooops! Noah is Gone...	DE / BE / LU / IE	2015	3	538 658		132 543		406 115
36	Julieta	ES	2016	11	536 659	17 533	487 351	25 358	6 417
37	Our Kind of Traitor	GB / FR	2016	8	532 988	366 645	69 732	96 611	
38	Kidnapping Mr. Heineken	BE / NL / US / GB	2015	1	481 914				481 914
39	En man som heter Ove	SE / NO	2015	3	474 059	384 087		2 558	87 414
40	Denial	GB INC / US	2016	2	473 656	473 656			
41	Youth	IT / FR / GB / CH	2015	9	453 594	163 478	169 133	40 261	80 722
42	Collide	GB / DE / US / CN	2016	1	434 860				434 860
43	Blood Father	FR	2016	7	421 619	39 372	327 727	54 520	
44	Miss Sloane	FR / US	2016	2	403 459	403 459			
45	Saul fia	HU / US / FR / IL / BA	2015	10	356 647	192 007	123 256	19 618	21 766
46	Cien años de perdón	ES / FR / AR	2016	3	353 416		353 416		
47	I.T.	IE / FR / US	2016	3	344 976		153 414		191 562
48	A Bigger Splash	IT	2015	5	309 198	235 359		59 385	14 454
49	Pinocchio	DE	2013	2	306 697		306 697		
50	Absolutely Anything	GB INC / US	2015	2	303 253				303 253

Source: European Audiovisual Observatory / LUMIERE, comScore

Table 29 contd.

N°	Film	Countries of origin	Prod. year	# of release markets	Adm. 2016 outside Europe	Adm. 2016 US/CA	Adm. 2016 Latin America	Adm. 2016 AU/NZ	Adm. 2016 CN/KR
51	Suffragette	GB	2015	9	290 461	5 253	80 500	177 403	27 305
52	Tini: El gran cambio de Violetta	ES / IT / AR	2016	6	268 812		268 812		
53	The Hallow	GB / US / IE	2015	5	268 108		268 108		
54	Masha i Medved: Zaputannyye …	RU	2015	1	265 360		265 360		
55	Aimer, Boire et Chanter	FR	2014	1	255 813	255 813			
56	The Eagle Huntress	GB / MN / US	2016	2	243 093	243 093			
57	Genius	GB INC / US	2016	5	237 659	158 260	79 399		
58	Truman	ES / AR	2015	7	221 885		193 852	28 033	
59	Miss You Already	GB	2015	4	214 504		214 504		
60	Mustang	FR / DE / TR	2015	10	206 994	78 912	78 397	43 616	6 069
61	Les innocentes	FR / PL	2016	5	195 099	123 921	71 178		
62	Ghoul	CZ / UA	2015	4	189 299		189 299		
63	Born to Be Blue	GB / CA	2015	3	171 636	79 901			91 735
64	Les saisons	FR / DE	2015	2	165 763	11 571			154 192
65	Dough	GB / HU	2015	3	164 845	133 523		31 322	
66	Schachnovelle	DE	1960	1	161 406		161 406		
67	Elle	FR / DE / BE	2016	5	153 779	99 043	37 826	16 910	
68	Ich seh, Ich seh	AT	2014	4	151 326		151 326		
69	Marguerite	FR / CZ / BE	2015	10	139 716	55 042	58 110	20 817	5 747
70	Mon roi	FR	2015	9	139 160	6 195	128 651	136	4 178
71	I, Daniel Blake	GB / FR / BE	2016	3	127 325			78 661	48 664
72	Le tout nouveau testament	BE / LU / FR	2015	7	119 900	5 855	98 807		15 238
73	La vache	FR	2016	5	113 592		113 592		
74	High-Rise	GB / BE	2015	5	113 465	40 287	34 154	15 800	23 224
75	Se Dio vuole	IT	2015	4	112 554		52 582	59 972	
76	Quo vado?	IT	2016	4	111 299		59 871	51 428	
77	De Surprise	NL / BE / DE / IE	2015	4	108 832		100 149		8 683
78	Dark Horse	GB	2015	2	107 576	107 576			
79	Hrútar	IS / DK / NO / PL	2015	9	104 197	17 210	17 638	67 944	1 405
80	Francofonia	FR / DE / NL	2015	6	103 562	35 702	59 501	5 169	3 190
81	La famille Bélier	FR / BE	2014	2	103 229			103 229	
82	Im Labyrinth des Schweigens	DE	2014	8	97 111	4 107	68 531	24 473	
83	Little Men	GR / BR / US	2016	5	95 163	81 690	9 552	3 921	
84	Ich bin dann mal weg	DE	2015	1	91 122				91 122
85	American Honey	GB / US	2016	4	88 395	77 120	6 914	4 361	
86	Belka i Strelka. Zvezdnye sobaki	RU	2010	3	87 184		87 184		
87	Un homme à la hauteur	FR	2016	4	85 935		65 286	12 334	8 315
88	Antigang	GB / FR	2015	1	85 275				85 275
89	Gespensterjäger	DE / AT / IE	2015	3	84 926		78 852		6 074
90	Louder Than Bombs	NO / FR / DK	2015	5	84 476	19 047	51 813	3 717	9 899
91	La corrispondenza	IT	2016	4	82 619		82 619		
92	Mia madre	IT / FR	2015	7	78 001	35 232	21 523	21 246	
93	Chocolat	FR	2016	3	76 610		76 610		
94	Miekkailija	FI / EE / DE	2015	2	75 763		50 535	25 228	
95	David Brent: Life on the Road	GB INC / US	2016	2	75 098			75 098	
96	Médecin de campagne	FR	2016	3	73 924		73 924		
97	The Little Prince	FR / US	2015	7	70 888		49 935		20 953
98	Demain	FR	2015	3	69 006	57 494	11 512		
99	Ballerina	FR / CA	2016	1	68 671		68 671		
100	My Scientology Movie	GB / US	2015	2	68 276			68 276	

Source: European Audiovisual Observatory / LUMIERE, comScore

6. APPENDIX

6.1. Number of films tracked in LUMIERE

Table 30. Number of films tracked in LUMIERE database by territory 2012-2016

Territory			2012	2013	2014	2015	2016
EUROPE							
1	**AT**	Austria	514	510	534	567	457
2	**BA**	Bosnia-Herzegovina			19	201	218
3	**BE**	Belgium	485	343	504	272	911
4	**BG**	Bulgaria	281	283	312	318	330
5	**CH**	Switzerland	1 676	1 671	1 643	1 642	1 834
6	**CY**	Cyprus	5	4	153	18	141
7	**CZ**	Czech Republic	1 124	1 228	1 076	1 179	1 251
8	**DE**	Germany	598	652	2 362	2 444	2 357
9	**DK**	Denmark	246	260	260	287	281
10	**EE**	Estonia	397	377	351	377	376
11	**ES**	Spain	1 234	1 463	1 473	585	693
12	**FI**	Finland	329	337	338	328	328
13	**FR**	France	790	933	935	958	856
14	**GB**	United Kingdom	740	798	2 560	2 587	2 745
15	**GE**	Georgia					194
16	**GR**	Greece	303	329	351	406	320
17	**HR**	Croatia	185	247	226	250	208
18	**HU**	Hungary	288	302	556	553	613
19	**IE**	Ireland	34	30	28	20	
20	**IS**	Iceland	30	7	161	196	199
21	**IT**	Italy	906	1 110	1 196	1 261	1 398
22	**LT**	Lithuania	43	304	267	290	288
23	**LU**	Luxembourg	110	76	104	112	
24	**LV**	Latvia	480	13	517	233	304
25	**ME**	Montenegro (from June 2006)		177	182	163	162
26	**MK**	Former Yugoslav Republic of Macedonia	80		221	23	
27	**NL**	Netherlands	1 113	1 201	1 133	562	610
28	**NO**	Norway	483	483	496	595	586
29	**PL**	Poland	474	507	547	556	497
30	**PT**	Portugal	816	956	995	1 030	867
31	**RO**	Romania	398	411	416	412	447
32	**RU**	Russian Federation	401	497	622	658	748
33	**SE**	Sweden	536	575	537	881	868
34	**SI**	Slovenia	399	442	430	505	473
35	**SK**	Slovakia	611	566	609	607	100
36	**TR**	Turkey	491	498	564	522	526
OUTSIDE OF EUROPE							
1	**AR**	Argentina	335	366	499	525	539
2	**AU**	Australia	410	432	569	621	680
3	**BR**	Brazil	358	467	613	648	687
4	**CA**	Canada	568	601	484	532	494
5	**CL**	Chile	209	203	281	289	259
6	**CN**	China			422	648	890
7	**CO**	Colombia	215	241	343	385	432
8	**KR**	South Korea	492	729	591	518	487
9	**MX**	Mexico	323	376	586	594	592
10	**NZ**	New Zealand	288	311	355	382	441
11	**US**	United States of America	1 221	1 238	815	833	832
12	**VE**	Venezuela	166	166	199	269	255

Source: European Audiovisual Observatory / LUMIERE, comScore

6.2. Admissions tracked in LUMIERE

Table 31. Admissions tracked in LUMIERE database by territory 2012-2016

Territory			2011	2012	2013	2014	2015
EUROPE							
1	AT	Austria	16 434 386	15 214 412	14 350 653	15 989 960	15 128 983
2	BA	Bosnia-Herzegovina			33 782	946 834	919 016
3	BE	Belgium	19 216 923	17 430 457	11 651 097	13 438 476	19 022 663
4	BG	Bulgaria	4 108 845	4 792 683	4 908 266	5 334 622	5 532 490
5	CH	Switzerland	15 461 270	13 577 832	12 786 036	14 289 522	13 315 252
6	CY	Cyprus	14 050	8 366	699 398	29 008	698 684
7	CZ	Czech Republic	11 152 268	11 032 364	11 455 342	12 922 707	15 537 428
8	DE	Germany	131 563 808	127 163 251	120 351 597	135 061 388	122 182 292
9	DK	Denmark	14 122 151	13 888 535	12 194 185	14 225 882	13 455 995
10	EE	Estonia	2 592 537	2 528 240	2 606 577	3 087 502	3 290 725
11	ES	Spain	94 043 529	79 648 617	87 585 014	95 856 396	101 680 611
12	FI	Finland	8 393 943	7 722 936	7 312 341	8 723 606	8 681 351
13	FR	France	194 730 726	178 724 378	191 387 285	189 695 423	188 542 398
14	GB	United Kingdom	185 103 726	176 255 610	168 061 645	182 456 096	180 297 324
15	GE	Georgia					1 139 673
16	GR	Greece	9 942 744	9 289 557	9 107 058	9 973 173	10 024 974
17	HR	Croatia	3 876 497	4 023 161	3 793 511	3 949 173	4 294 781
18	HU	Hungary	10 086 836	9 635 321	11 016 406	13 018 248	14 626 562
19	IE	Ireland	69 610	44 149	56 005	87 025	
20	IS	Iceland	35 824	18 313	1 344 560	1 378 555	1 420 503
21	IT	Italy	92 144 834	97 793 263	92 010 500	99 860 129	105 292 058
22	LT	Lithuania	139 993	3 257 020	3 240 702	3 330 451	3 667 730
23	LU	Luxembourg	170 115	79 310	514 175	132 815	
24	LV	Latvia	2 258 661	26 901	2 303 718	2 286 742	2 515 038
25	ME	Montenegro (from June 2006)		222 804	258 894	241 620	241 620
26	MK	Former Yugoslav Republic of Macedonia	118 511		357 324	9 355	
27	NL	Netherlands	28 652 781	30 629 011	30 671 280	30 323 060	33 463 038
28	NO	Norway	11 928 047	11 614 265	10 890 188	11 892 931	12 954 537
29	PL	Poland	38 421 989	36 242 716	40 386 379	44 546 300	51 976 471
30	PT	Portugal	13 798 143	12 511 978	12 085 692	14 542 013	14 888 361
31	RO	Romania	8 316 859	9 020 701	10 131 494	11 131 959	12 980 911
32	RU	Russian Federation	171 671 503	192 409 536	191 529 707	191 231 273	213 443 556
33	SE	Sweden	18 346 705	16 582 505	16 246 619	17 015 707	17 723 099
34	SI	Slovenia	2 636 702	2 159 369	1 847 744	1 978 525	2 295 466
35	SK	Slovakia	3 432 069	3 720 169	4 119 361	4 607 152	4 891 758
36	TR	Turkey	44 218 040	50 399 726	61 353 895	60 355 895	58 293 932
OUTSIDE OF EUROPE							
1	AR	Argentina	45 165 968	46 180 711	43 797 344	50 051 809	47 742 990
2	AU	Australia	81 039 376	74 291 541	77 117 515	87 971 495	84 382 650
3	BR	Brazil	137 939 391	141 903 602	154 745 338	168 327 209	179 419 882
4	CA	Canada	128 539 934	117 059 141	116 206 322	118 399 764	115 959 416
5	CL	Chile	19 372 659	20 338 487	21 940 101	25 898 969	27 052 997
6	CN	China			794 733 977	1 214 104 427	1 313 959 564
7	CO	Colombia	38 672 496	41 014 822	45 986 154	58 667 015	59 668 996
8	KR	South Korea	187 284 891	204 387 042	210 927 515	214 338 372	206 494 580
9	MX	Mexico	218 704 629	245 142 465	256 255 435	294 365 188	328 246 682
10	NZ	New Zealand	12 235 954	10 528 886	10 939 122	13 890 356	15 059 018
11	US	United States of America	1 149 189 023	1 115 270 398	1 154 434 603	1 197 322 384	1 195 094 846
12	VE	Venezuela	27 119 596	27 261 651	29 592 206	28 918 555	18 784 388

Source: European Audiovisual Observatory / LUMIERE, comScore

6.3. Estimated LUMIERE coverage rates

Table 32. Estimated LUMIERE coverage rate of individual territories 2012-2016 (in %)

Territory			2012	2013	2014	2015	2016
EUROPE							
1	**AT**	Austria	100	100	100	99	94
2	**BA**	Bosnia-Herzegovina			3	100	97
3	**BE**	Belgium	87	83	54	61	86
4	**BG**	Bulgaria	100	99	100	100	100
5	**CH**	Switzerland	99	99	98	99	92
6	**CY**	Cyprus	1	1	100	3	94
7	**CZ**	Czech Republic	99	99	99	99	100
8	**DE**	Germany	97	98	98	97	87
9	**DK**	Denmark	100	100	99	100	94
10	**EE**	Estonia	100	98	100	99	100
11	**ES**	Spain	100	100	100	100	100
12	**FI**	Finland	100	99	100	99	98
13	**FR**	France	95	92	91	92	91
14	**GB**	United Kingdom	100	100	100	100	100
15	**GE**	Georgia					99
16	**GR**	Greece	98	100	100	100	100
17	**HR**	Croatia	95	100	100	100	100
18	**HU**	Hungary	100	94	100	100	100
19	**IE**	Ireland					
20	**IS**	Iceland	2	1	99	96	99
21	**IT**	Italy	92	91	92	93	98
22	**LT**	Lithuania	4	100	100	99	100
23	**LU**	Luxembourg	13	6	45	10	
24	**LV**	Latvia	98	1	99	96	100
25	**ME**	Montenegro (from June 2006)			100	80	80
26	**MK**	Former Yugoslav Republic of Macedonia	58		99	2	
27	**NL**	Netherlands	93	99	99	92	100
28	**NO**	Norway	98	98	98	98	100
29	**PL**	Poland	99	99	99	99	100
30	**PT**	Portugal	99	99	99	100	100
31	**RO**	Romania	99	99	99	100	100
32	**RU**	Russian Federation	100	100	100	100	100
33	**SE**	Sweden	100	99	99	99	100
34	**SI**	Slovenia	96	92	95	96	100
35	**SK**	Slovakia	99	99	99	100	100
36	**TR**	Turkey	100	99	99	99	96
OUTSIDE OF EUROPE							
1	**AR**	Argentina	100	100	96	96	94
2	**AU**	Australia	94	90	98	100	100
3	**BR**	Brazil	92	94	99	100	100
4	**CA**	Canada	99	91	95	97	95
5	**CL**	Chile	100	100	100	100	100
6	**CN**	China			95	100	100
7	**CO**	Colombia	94	94	98	100	100
8	**KR**	South Korea	96	95	98	99	96
9	**MX**	Mexico	95	98	100	100	100
10	**NZ**	New Zealand	83	71	73	92	100
11	**US**	United States of America	93	91	100	100	100
12	**VE**	Venezuela	92	90	98	96	98

Source: European Audiovisual Observatory / LUMIERE, comScore

6.4. Treatment of EUR inc films

As mentioned in the methodological remarks in chapter 2, European films financed with incoming US investment („EUR inc films") are by default not counted as European but rather US films in the context of this report.
The following EUR inc films however represent an exception to this rule as they feature as European films in the European Commission's Executive Agency EAC's film database (https://eacea.ec.europa.eu/mediaPgm/tabsMenu.do) and / or in Europa Cinema's film database (http://www.europa-cinemas.org/en/Resources/Film-Database). Please note that Observatory's „INC" classification is not based on the same criteria as the British Film Institute's classification of „inward investment" films in the UK. The Observatory's „INC" classification is more restrictive and counts less films as „GB" or „GB inc" films than the BFI counts „UK films".

Table 33. EUR INC films considered as European films in this report

N°	Film	COO (FINAL)	Prod Year	Director	ADM outside Europe - 2015
1	Eddie the Eagle	GB INC / US	2016	Dexter Fletcher	3 263 533
2	Absolutely Fabulous: The Movie	GB INC / US	2016	Mandie Fletcher	1 253 617
3	Bastille Day	GB INC / US	2016	James Watkins	1 213 284
4	Denial	GB INC / US	2016	Mick Jackson	473 656
5	Absolutely Anything	GB INC / US	2015	Terry Jones	303 253
6	Genius	GB INC / US	2016	Michael Grandage	237 659
7	David Brent: Life on the Road	GB INC / US	2016	Ricky Gervais	75 098
8	Dancer	GB INC / US	2016	Steven Cantor	19 759
9	Rush	GB INC / US / DE	2013	Ron Howard	1 913

Source: European Audiovisual Observatory / LUMIERE, comScore

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

Table 34. EUR INC films considered as US films in this report

N°	Film	COO (Original)	Prod Year	Director	ADM outside Europe - 2015
1	Children of Men	US / GB INC / JP	2006	Alfonso Cuarón	18 862
2	Walking with Dinosaurs 3D	US / GB INC / IN / AU	2013	B. Cook, N. Nightingale	7 695
6	Magic in the Moonlight	US / GB INC	2014	Woody Allen	17
7	Exodus: Gods and Kings	US / GB INC / ES	2014	Ridley Scott	378
8	Maleficent	US / GB INC	2014	Robert Stromberg	734
9	The Monuments Men	US / DE / GB INC	2014	George Clooney	103

Source: European Audiovisual Observatory / LUMIERE, comScore

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