The circulation of European films outside Europe

Key figures 2018

LUMIERE

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The circulation of European films outside Europe
Key figures 2018
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Martin Kanzler

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EXECUTIVE SUMMARY

This report focuses on the theatrical exploitation of European films outside Europe. It should be kept in mind that the theatrical window is only one of, broadly speaking, four market segments: TV, video and video on demand (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 2018

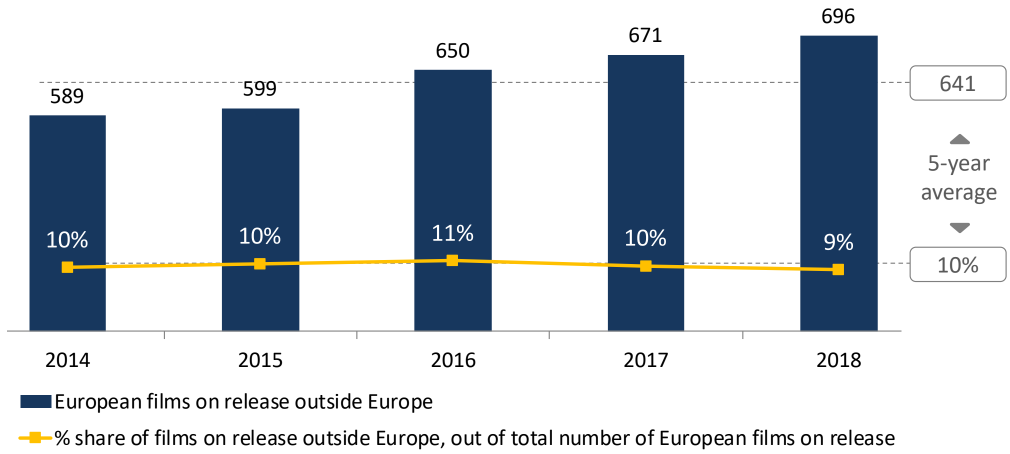
An estimated total of 696 European films were on theatrical release in at least one of the 15 non-European markets covered in this report. This is the largest number of European films released outside Europe in the past five years and represents about 9% of the total number of European films tracked as on release worldwide (see Figure 1 below).

The 696 films cumulatively generated about 87 million admissions outside Europe in 2018, representing 19% of total admissions to European films tracked worldwide. These levels are well in line with 2014 and 2016 but significantly below the values registered in 2015 and 2017 (see Figure 2).

Applying local average ticket prices, this corresponds with an estimated EUR 496 million in gross box office (GBO) earned by European films outside Europe in 2018.

Figure 1. Number of European films on release outside Europe (2014-2018)

As tracked in LUMIERE (i.e. does not include European films exclusively released in Hong Kong, Japan or Singapore for 2014 to 2016).

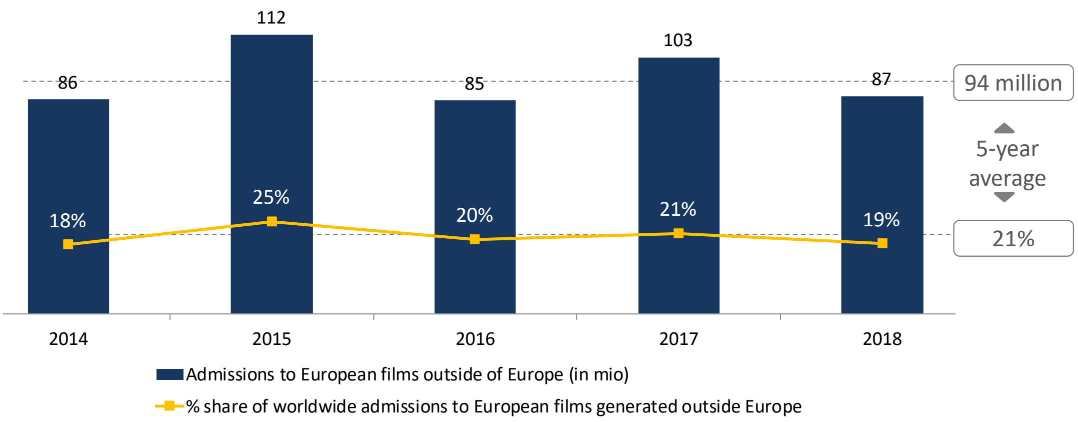


Remark: The fact that data for Hong Kong, Japan and Singapore are only available from 2017 ownards does not limit the comparability of the number of films on release over the past five years due to the low number of European films that were exclusively on release in these three markets but nowhere else.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Figure 2. Cumulative admissions to European films outside Europe (2014-2018)

In million. As tracked in LUMIERE with the exception of estimated admissions for Hong Kong, Japan and Singapore for 2014-2016.



Source: European Audiovisual Observatory / LUMIERE, Comscore

European films accounted for 18% of the tracked number of films on release outside Europe and 2% of admissions generated in the 15 non-European sample markets in 2018. This is slightly below the five-year average.

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

2018 saw the US reclaim its long-established position as the largest export market for European films in terms of admissions, from China, which had – thanks to the exceptional success of *Valerian and the City of a Thousand Planets* – become the largest export market for European films in 2017. Growing 10% over 2017, European films sold 26.5 million tickets in the US in 2018 - 30% of total admissions to European films outside Europe. This compares to 20.0 million admissions in China (23%) where ticket sales to European films dropped below the five-year average. Accounting for 14% (12.4 million), Mexico came third, ahead of Australia (5.6 million) and Brazil (4.3 million).

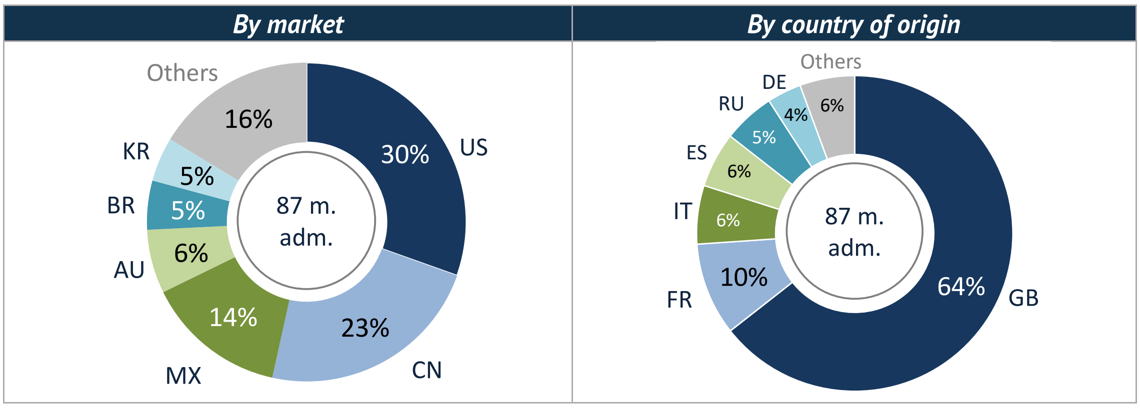
Thanks to comparatively high average ticket prices, the US also confirmed its position as by far the largest export market for European films in terms of GBO takings. Based on the data available, the Observatory estimates that European films took EUR 206 million at the US box office in 2018, accounting for 41% of total non-European GBO takings, followed at a distance by China (EUR 91 million, 18%), Australia (EUR 49 million, 10%), Mexico (EUR 28 million, 6%) and South Korea (EUR 25 million, 5%).

UK films dominated European film exports in 2018

Breaking European film exports down by country of origin, it is evident that UK and French films dominate European film exports outside of Europe: cumulatively they accounted for one in two export films, and 74% of total admissions to European films outside Europe, in 2018. This is significantly higher than 2017 (66%) but well in line with 2016 (72%) and even low compared to 2015 (87%). The year 2018 was exceptional in the sense that UK films alone accounted for 64% of total admissions to European films outside Europe, while French export films performed comparatively poorly, accounting for only 10%. This dominance of UK films is also reflected in the composition of the top 20 European films in terms of international admissions: UK films accounted for eight out of the top 10 and 13 out of the top 20 European export films in 2018.

Figure 3. Breakdown of admissions to European films outside Europe by market and origin (2018)

Estimated. As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Three out of four European film exports were released in only one or two international markets, and eight of 10 films sold fewer than 50 000 tickets outside Europe in 2018

A total of 59% (408 films) of the 696 European films on theatrical release outside Europe in 2018 were screened in only a single territory. Another 113 films (16%) were on release in only two markets. This means that three of four European export films were screened in only one or two of the 15 non-European markets covered in this report. The implication is that the portfolio of European films on release outside Europe varies largely from one territory to another. In fact, only 61 European films (9%) were on release in six or more non-European markets. These widely exported films cumulatively captured 62% of total admissions to European films outside Europe.

Similarly, eight of ten European films (78%) generated fewer than 50 000 admissions outside Europe and one in four European film exports (26%) captured fewer than 1 000 admissions.Only 16 films sold more than one million tickets outside Europe in 2018.

***Johnny English Strikes Again* was the most successful European film outside Europe, selling 9.6 million tickets in 2018**

Led by UK action comedy *Johnny English Strikes Again (GB / US / FR)*, on release in 11 non-European markets tracked and selling 9.6 million tickets outside Europe in 2018 (accounting for 10% of total admissions to European films outside Europe), a total of four European *blockbusters* sold more than five million tickets outside Europe: *The Commuter* (GB

/ US / FR - 9.6 million); *Paddington 2* (GB / FR - 6.9 million); and *Darkest Hour* (GB / US - 5.7 million). Cumulatively, the top 10 films accounted for 50% of total international admissions, the top 50 films for 81% and the top 100 films for 91%.

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 vidéo à la demande (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 2018

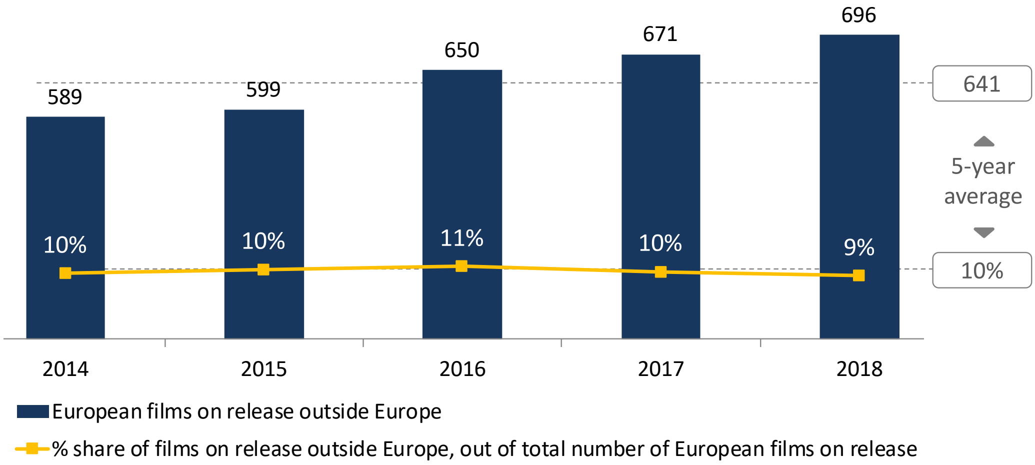
Il est estimé qu'un total de 696 films européens est sorti en salles sur au moins l'un des 15 marchés non européens couverts par le présent rapport. Il s'agit du plus grand nombre de films européens sortis en salles hors d'Europe des cinq dernières années et cela représente environ 9 % du nombre total de films européens sortis en salles au niveau mondial (voir graphique 1 ci-dessous).

Ces 696 films ont cumulativement généré quelque 87 millions d'entrées hors d'Europe en 2018, soit 19 % des entrées totales réalisées au niveau mondial par les films européens suivis. Ces niveaux sont conformes à ceux observés en 2014 et 2016, mais nettement inférieurs aux valeurs enregistrées en 2015 et 2017 (voir graphique 2).

En appliquant le prix moyen du billet local, il est estimé que les films européens ont généré 496 millions d'EUR de recettes brutes au guichet hors d'Europe en 2018.

Figure 4. Nombre de films européens sortis en salles hors d'Europe (2014-2018)

Tels que suivis dans LUMIERE (c'est-à-dire n'incluant pas les films européens sortis exclusivement à Hong Kong, au Japon ou à Singapour entre 2014 et 2016).

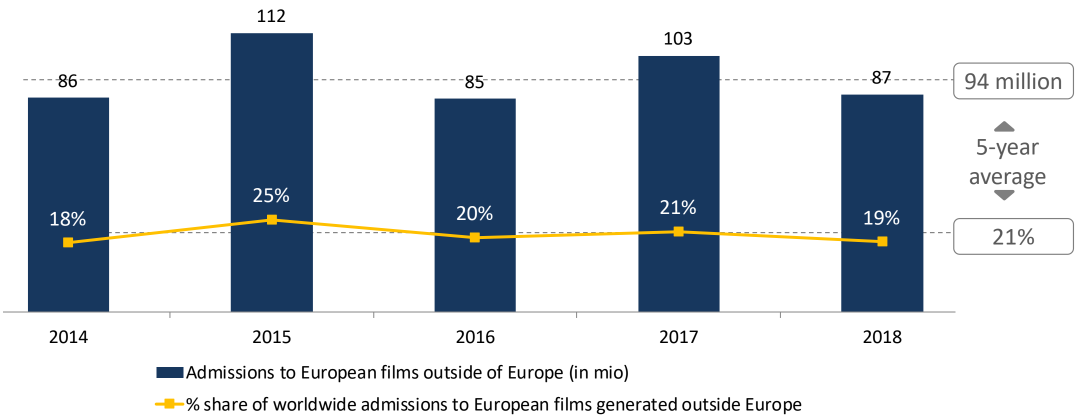


Remarque : le fait que les données pour Hong Kong, le Japon et Singapour ne soient disponibles qu'à partir de 2017 ne limite pas la comparabilité du nombre de films sortis en salles ces cinq dernières années compte tenu du faible nombre de films européens qui sont sortis en salles uniquement sur ces trois marchés et nulle part ailleurs.

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

Figure 5. Entrées totales des films européens hors d'Europe (2014-2018)

Selon LUMIERE, à l'exception des entrées estimées pour Hong Kong, le Japon et Singapour entre 2014 et 2016.



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

Les films européens représentent 18 % du nombre de films sortis en salles hors d'Europe suivis et 2 % des entrées en salles générées sur les 15 marchés non européens de l'échantillon en 2018. Ce chiffre est légèrement inférieur à la moyenne sur cinq ans.

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

En 2018, pour ce qui est des entrées en salles, les États-Unis ont repris leur habituelle position de premier marché d'exportation pour les films européens à la Chine, qui était devenue – grâce au succès exceptionnel de *Valerian and the City of a Thousand Planets* – le principal marché d'exportation pour les films européens en 2017. En hausse de 10 % par rapport à 2017, les films européens ont vendu 26,5 millions de billets aux États-Unis en 2018, soit 30 % du total des entrées des films européens hors d'Europe. À titre de comparaison, 20 millions d'entrées ont été enregistrées en Chine (23 %), où les ventes de billets pour les films européens ont été inférieures à la moyenne sur cinq ans. Avec 14 % (12,4 millions), le Mexique arrive en troisième position, devant l'Australie (5,6 millions) et le Brésil (4,3 millions).

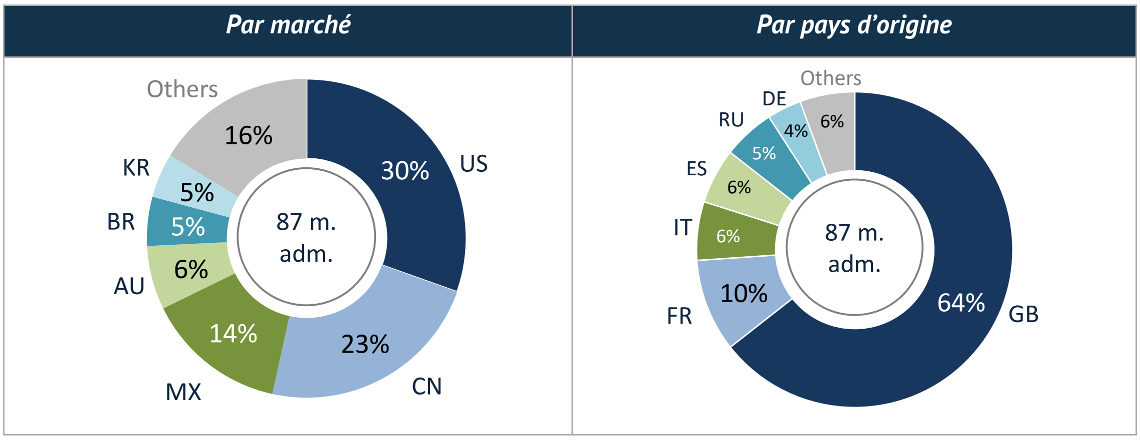
Grâce à un prix moyen du billet relativement élevé, les États-Unis ont également confirmé leur position de principal marché d'exportation des films européens pour ce qui est des recettes brutes au guichet. Sur la base des données disponibles, l'Observatoire estime que les films européens ont rapporté 206 millions d'EUR de recettes brutes au guichet aux États-Unis en 2018, soit 41 % des recettes brutes au guichet totales générées hors d'Europe, suivis de loin par la Chine (91 millions d'EUR, 18 %), l'Australie (49 millions d'EUR, 10 %), le Mexique (28 millions d'EUR, 6 %) et la Corée du Sud (25 millions d'EUR, 5 %).

Les films britanniques ont dominé les exportations de films européens en 2018

Si l'on ventile les exportations de films européens par pays d'origine, il est évident que les films britanniques et français dominent les exportations de films européens hors d'Europe : cumulativement, ils représentent un film d'exportation sur deux et 74 % des entrées totales des films européens hors d'Europe en 2018. Ce chiffre est nettement supérieur à celui de 2017 (66 %), mais conforme à celui de 2016 (72 %) et est même faible par rapport à celui de 2015 (87 %). L'année 2018 a été exceptionnelle dans le sens où les films britanniques ont représenté à eux seuls 64 % du total des entrées des films européens hors d'Europe, alors que les films français à l'exportation ont eu des résultats comparativement mauvais, ne représentant que 10 % de ce total. Cette domination des films britanniques se reflète également dans la composition du top 20 des films européens pour ce qui est des entrées internationales : en 2018, huit des 10 premiers films et 13 des 20 premiers films européens à l'exportation étaient britanniques.

Figure 6. ***Repartition des entrées réalisées par les films européens hors d'Europe, par marché et par origine (2018)***

Estimation. Selon LUMIERE.



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

Trois films européens sur quatre sont sortis sur un ou deux marchés internationaux seulement, et huit films sur dix ont vendu moins de 50 000 billets hors d'Europe en 2018

Au total, 59 % (408 films) des 696 films européens sortis en salles hors d'Europe en 2018 n'a été projeté que sur un seul territoire. 113 autres films (16 %) ne sont sortis que sur deux marchés. Cela signifie que trois films d'exportation européens sur quatre ont été projetés dans seulement un ou deux des 15 marchés non européens couverts par ce rapport. Il s'ensuit que le portefeuille de films européens sortis en salles hors d'Europe varie largement d'un territoire à l'autre. En fait, seuls 61 films européens (9 %) sont sortis sur au moins six marchés non européens. Les films qui ont été le plus largement exportés représentent cumulativement 62 % du total des entrées des films européens hors d'Europe.

De même, huit films européens sur dix (78 %) ont généré moins de 50 000 entrées hors d'Europe et un film européen sur quatre (26 %) a enregistré moins de 1 000 entrées. Seuls 16 films ont vendu plus d'un million de billets hors d'Europe en 2018.

***Johnny English Strikes Again* est le film européen qui a connu le plus grand succès hors d'Europe, avec 9,6 millions d'entrées en 2018**

Sous l'impulsion de la comédie d'action britannique *Johnny English Strikes Again* (GB / US / FR), sortie sur 11 marchés non européens et ayant vendu 9,6 millions de billets hors d'Europe en 2018 (soit 10 % du total des entrées des films européens hors d'Europe), un total de quatre *superproductions* européennes ont vendu plus de cinq millions de billets hors d'Europe : *The Commuter* (GB / US / FR - 9,6 millions) ; *Paddington 2* (GB / FR - 6,9 millions) ; et *Darkest Hour* (GB / US - 5,7 millions). Cumulativement, les 10 premiers films représentent 50 % du total des entrées internationales, les 50 premiers films, 81 % et les 100 premiers films, 91 %.

ZUSAMMENFASSUNG

Der Schwerpunkt dieses Berichts liegt auf der Kinoauswertung europäischer Filme im außereuropäischen Ausland. Hier sei noch darauf verwiesen, dass die Kinoauswertung nur eines von - allgemein gesagt - vier Marktsegmenten darstellt. Auch die TV-, Video- und VoD-Märkte können ein wichtiges Marktpotenzial für europäische Filme darstellen, doch quantitative Angaben dazu sind aufgrund der fehlenden Transparenz der entsprechenden Umsatz- bzw. Konsumdaten nicht möglich.

Das Volumen des Kinomarktes für europäische Filme außerhalb Europas 2018

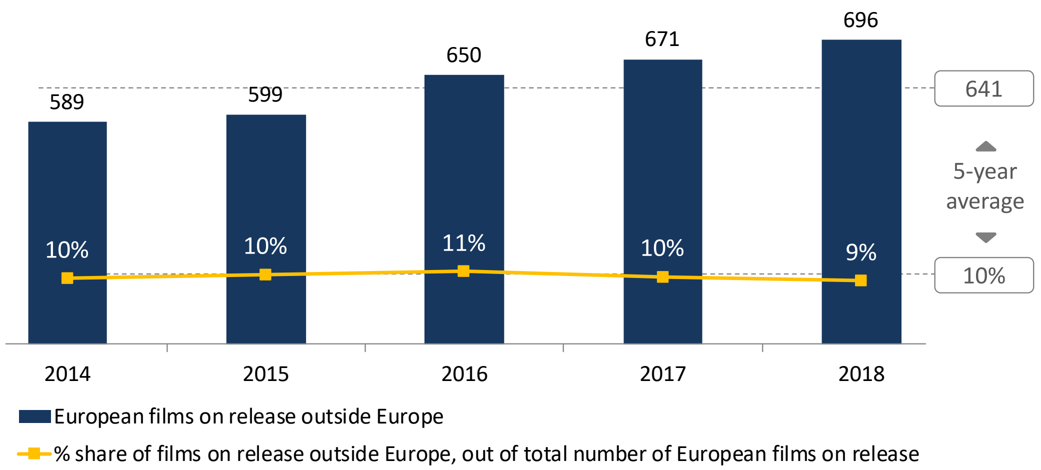
Schätzungsweise wurden 2018 insgesamt 696 europäische Filme in mindestens einem der 15 in diesem Bericht erfassten nicht-europäischen Märkte im Kino ausgewertet. Das ist die höchste Anzahl von europäischen Filmen, die in den letzten fünf Jahren außerhalb Europas im Kino gezeigt wurden und entspricht ca. 9 % sämtlicher europäischer Filme, die weltweit im Kino laufen (siehe unten Abb. 1).

Die 696 Filme wurden 2018 von insgesamt etwa 87 Mio. Kinobesuchern außerhalb Europas gesehen, das sind 19 % sämtlicher Besucher europäischer Filme weltweit. Diese Werte entsprechen denjenigen der Jahre 2014 und 2016, liegen aber deutlich unter dem Niveau der Jahre 2015 bzw. 2017 (siehe Abb. 2).

Unter Ansatz lokaler Eintrittspreise wurde 2018 mit europäischen Filmen außerhalb Europas ein geschätztes Bruttoeinspielergebnis in Höhe von EUR 496 Mio. erzielt.

Figure 7. Anzahl europäischer Filme, die außerhalb Europas im Kino verwertet wurden (2014-2018)

Wie in LUMIERE erfasst (d.h. europäische Filme, die von 2014 bis 2016 ausschließlich in Hongkong, Japan und Singapur verwertet wurden, konnten nicht berücksichtigt werden.)

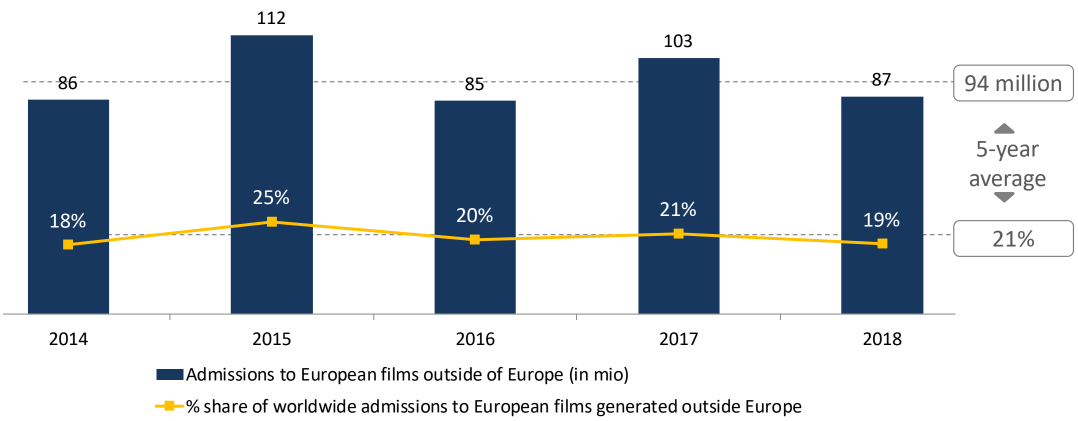


Anmerkung: Die Tatsache, dass für Hongkong, Japan und Singapur nur Daten ab 2017 vorliegen, schränkt die Vergleichbarkeit der Angaben zu den in den letzten fünf Jahren im Kino verwerteten Filme nicht ein, da es sich nur um eine sehr geringe Anzahl von Filmen handelt, die ausschließlich in diesen drei Märkten im Kino gezeigt wurden - und nirgendwo sonst.

Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE, Comscore

Figure 8. Kumulierte Besucherzahlen europäischer Filme außerhalb Europas (2014-2018)

Wie in LUMIERE erfasst ohne Berücksichtigung geschätzter Besucherzahlen von Hongkong, Japan und Singapur von 2014 bis 2016



Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE, Comscore

Europäische Filme machten 18 % der im Kino außerhalb Europas gezeigten Filme aus; auf sie entfielen 2 % der Besucherzahlen in den 15 nicht-europäischen Märkten der Datenprobe. Dieser Wert liegt leicht unter dem 5-Jahresdurchschnitt.

USA wieder größter Exportmarkt für europäische Filme, gemessen an Besucherzahlen

Im Jahr 2018 übernahmen die USA wieder die Führungsposition als größter Exportmarkt für europäische Filme, gemessen an Besucherzahlen - eine Position, die sie viele lange Jahre innehatten - und lösten damit China ab, das dank des außerordentlichen Erfolgs von *Valerian and the City of a Thousand Planets [dt.: Valerian - Die Stadt der tausend Planeten]* 2017 zum größten Exportmarkt für europäische Filme geworden war. Für europäische Filme wurden 2018 in den USA 26,5 Mio. Tickets verkauft - 10% mehr als im Vorjahr; das sind 30% sämtlicher Besucher europäischer Filme außerhalb Europas. Im Vergleich dazu wurden in China 20,0 Mio. Tickets (23 %) verkauft, wo die Zahl der verkauften Eintrittskarten für europäische Filme unter den 5-Jahresdurchschnitt fiel. An dritter Stelle folgte Mexiko mit 14 % (12,4 Mio.), vor Australien (5,6 Mio.) und Brasilien (4,3 Mio.).

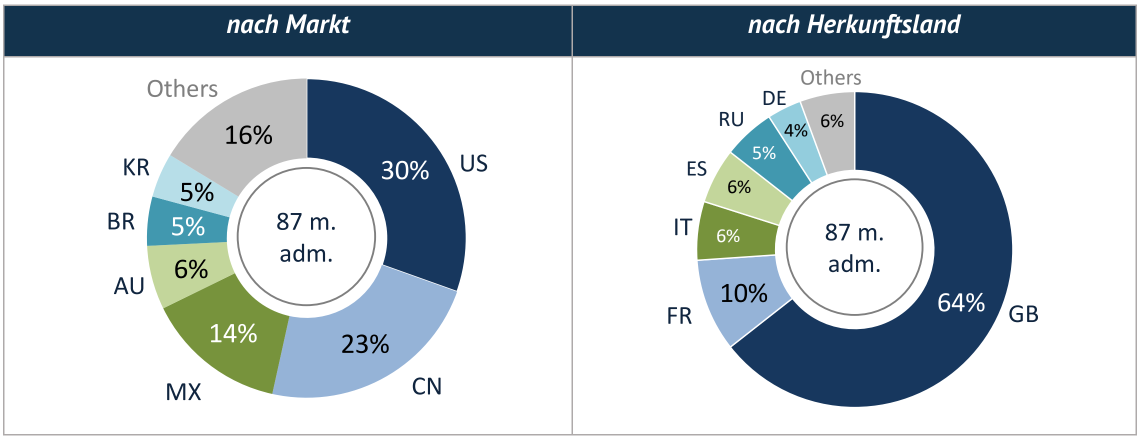
Aufgrund der relativ hohen durchschnittlichen Eintrittspreise konnten die USA auch ihre Position als mit Abstand größter Exportmarkt für europäische Filme, gemessen an den Einspielergebnissen, halten. Ausgehend von den verfügbaren Daten schätzt die Informationsstelle, dass europäische Filme in den USA im Jahr 2018 EUR 206 Mio. einspielten, was 41 % der gesamten außereuropäischen Bruttoeinspielergebnisse entspricht; mit einigem Abstand folgen China (EUR 91 Mio., 18 %), Australien (EUR 49 Mio., 10 %), Mexiko (EUR 28 Mio., 6 %) und Südkorea (EUR 25 Mio., 5 %).

Britische Filme liegen 2018 bei europäischen Filmexporten vorn

Bei einer Differenzierung nach Herkunftsland zeigt sich, dass britische und französische Filme beim Export ins außereuropäische Ausland führend sind: 2018 entfielen auf sie 74% sämtlicher Besucher europäischer Filme außerhalb Europas. Das ist deutlich mehr als im Jahr 2017 (66 %), steht aber im Einklang mit 2016 (72 %) und ist im Vergleich zu 2015 (87 %) sogar eher wenig. Das Jahr 2018 war außergewöhnlich in dem Sinn, dass auf britische Filme allein 64 % der Gesamtbesucherzahlen europäischer Filme außerhalb Europas entfielen, während französische Filme relativ schlecht abschnitten und nur 10 % erreichten. Diese Dominanz britischer Filme zeigt sich auch mit Blick auf die internationalen Besucherzahlen der zwanzig erfolgreichsten europäischen Filme: In der Top 10 der europäischen Exportfilme waren 8 britische Filme, und in der Top 20 waren es 13.

Figure 9. Aufteilung der Besucherzahlen europäischer Filme außerhalb Europas nach Markt und Herkunftsland (2018)

Schätzung basierend auf LUMIERE Daten.



Quelle: Europäische Audiovisuelle Informationsstelle / LUMIERE, Comscore

Drei von vier exportierten europäischen Filmen wurden nur in einem oder zwei internationalen Märkten verwertet; und für acht von zehn Filmen wurden 2018 außerhalb Europas weniger als 50 000 Tickets verkauft.

Insgesamt 59 % (408 Filme) der 696 außerhalb Europas im Kino verwerteten europäischen Filme wurden 2018 nur in einem Markt gezeigt. Weitere 113 Filme (16 %) wurden nur an zwei Märkten im Kino verwertet . Das bedeutet, dass drei von vier exportierten europäischen Filmen nur in einem oder zwei der 15 in diesem Bericht erfassten nicht-europäischen Märkte im Kino gezeigt wurde. Dies ist ein Hinweis darauf, dass sich das Portfolio europäischer Kinofilme außerhalb Europas von Land zu Land stark unterscheidet. In der Tat liefen lediglich 61 europäische Filme (9%) in sechs oder mehr außereuropäischen Märkten im Kino. Diese am meisten exportierten Filme zeichneten für insgesamt 62 % der Besucher europäischer Filme außerhalb Europas verantwortlich

In ähnlicher Weise erreichten acht von zehn europäischen Filmen (78 %) weniger als 50 000 Kinobesucher außerhalb Europas; und einer von vier exportierten europäischen

Filme (26 %) kam auf weniger als 1 000 Besucher. Nur für 16 Filme wurden 2018 außerhalb Europas mehr als eine Million Tickets verkauft.

***Johnny English Strikes Again [dt.: Johnny English - Man lebt nur dreimal]* war 2018 außerhalb Europas der erfolgreichste europäische Film, den sich 9,6 Mio. Kinobesucher ansahen.**

Neben der britischen Actionkomödie *Johnny English Strikes Again* (GB / US / FR) - die in 11 der erfassten nicht-europäischen Märkten lief und die 2018 außerhalb Europas 9,6 Mio. Besucher sahen (dies entspricht 10 % der Gesamtbesucherzahlen europäischer Filme außerhalb Europas) - wurden für weitere drei europäische Blockbuster außerhalb Europas mehr als fünf Millionen Tickets verkauft: *The Commuter* (GB / US / FR - 9,6 Mio.); *Paddington 2* (GB / FR - 6,9 Mio.); und *Darkest Hour [dt.: Die dunkelste Stunde]* (GB / US - 5,7 Mio.). Kumulativ betrachtet erreichten die zehn besten Filme 50 % der internationalen Zuschauer; die Top 50 81 % und die Top 100 91 %.

1. INTRODUCTION & METHODOLOGY

1.1. Introduction

About this report

This report aims to provide high-level analysis of the theatrical markets for European films outside Europe based on admissions data provided by Comscore for 15 non-European markets including the North American market, five Latin American markets, and five Asian markets, as well as Australia and New Zealand. The analysis focuses on 2017 data but is complemented by five-year data series for the period 2014 to 2018 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 foreigninvestment, data presented in this report may differ significantly from data published by national sources such as the British Film Institute or the CNC / UniFrance. For analysis of the export of films originating from a specific country, please refer to national sources. See methodological remarks for further details.

The report addresses in particular the following research questions:

- How important is non-national exploitation, particularly outside Europe, for European films? How many European films are theatrically released outside Europe? How many admissions and how much 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 distributed in the form of for example:

- print or electronic publications, including a statistical Yearbook, as well as newsletters and thematic reports on the Observatory's website

- free databases on film admissions (LUMIERE), VOD catalogues (LUMIERE VOD), TV & on-demand services (MAVISE), AV law information (IRIS Merlin)
- contributions to conferences

1.2. Data scope & sources

Data scope

In principle, the data set covers title-by-title admissions data for all feature films on release, 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 2018 admissions data for 15 non-European markets and situates them in the context of admissions data for another 34 European markets covered in the LUMIERE database:

Market region	Countries covered in 2018
North America	Canada (CA) USA (US)
Latin America	Argentina (AR) Brasil (BR) Chile (CL) Colombia (CO) Mexico (MX) Venezuela (VE)
Oceania	Australia (AU) New Zealand (NZ)
Asia	China (CN) Hong Kong (HK) Japan (JP) South Korea (KR) Singapore (SG)
Europe (covered at least partially)	Austria, Belgium, Bulgaria, Bosnia-Herzegovina, Croatia, Cyprus, 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 appears to cover a higher number of smaller and repertoire films with very few admissions than Comscore outside Europe. The number of films on release in Europe is hence portrayed as significantly higher than 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 for example in Québec. Hence, all data in this report drawn from LUMIERE are to be interpreted as estimated minimum figures.

Data sources

Admissions data for the 15 non-European markets covered in this report have been provided by Comscore, purchased by the European Audiovisual Observatory on behalf of a buying group consisting of several EFARN members. All European admissions data come from the European Audiovisual Observatory's LUMIERE database which collates annual admissions from a wide variety of sources.

comScore

www.Comscore.com

Comscore

Comscore is a global cross-platform measurement company that measures audiences, brands and consumer behaviour across all screens. It completed its merger with Rentrak Corporation in January 2016. The company now offers its clients proprietary digital, TV and movie intelligence with vast demographic details to quantify consumers' multiscreen behaviour at massive scale.

LUMIERE

www.lumiere.obs.coe.int

LUMIERE database on film admissions

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

Creative Europe MEDIA

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

MEDIA programme

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

1.3. Methodology remarks & definitions

How to measure "film market volume"?

Theatrical feature films are commercially exploited across a variety of different distribution windows. However, it is practically impossible to quantify the total market volume for theatrical films across all these windows. This is primarily due to methodological challenges related to 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.

The approach in this report is to measure market volume in terms of consumer expenditure on film. Methodologically speaking, this approach can be easily applied to measure the market volume of theatrical markets (GBO), physical video, retail and rental markets, as well as transactional VOD markets. Complications arise, however, with regard to the exploitation of films on TV or SVOD services, where there is generally no direct link between consumer expenditure and the consumption of theatrical films. To overcome this issue, one may for example 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 that 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 tracked for home entertainment (DVD / Blu-ray, retail and rental) and TV markets, they are generally not made available to the general public and are sold at prohibitive prices, which makes tracking them practically impossible for an organisation like the Observatory. In the case of VOD markets, the situation is even worse, as they remain more or less completely intransparent with regard to consumer expenditure 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, 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 divergence may be due to the use of different data sets and / or varying methodological choices. Since the focus of this report is on the provision of a 'big picture' overview of the circulation of European films as a whole rather than analysis of the film exports of individual European countries, the Observatory's methodological choices – in particular regarding the allocation of a unique country of origin based on the majority financing share as well as the exclusion of films financed with incoming foreign investment – may differ from methodologies applied by national sources seeking to analyse the export of films originating 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 analysis of the export of films originating from a specific country, please refer to national sources.

<u>What is the definition of "film" in the context of this report</u>?

In principle, the data set covers all feature fiction, documentary or animation films on theatrical release, namely 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 have not been considered in this analysis.

<u>What does the term "film offering" stand for</u>?

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 reveal 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.

<u>What does "on release" mean</u>?

Any film that has had 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 European and non-European markets and regions can limit the direct comparability of the indicator "number of films on release" and distort any related statistical analysis: in many European countries LUMIERE appears to cover a higher number of smaller and repertoire films with very few admissions than the number of such films covered by Comscore data outside Europe. The number of films on release is thus portrayed as significantly higher in some markets than in others. Given the lack of comprehensive and fully comparable data sets, it cannot be determined to what degree these are structural differences and to what degree this is simply caused by more limited data sets for non-European markets.

<u>What is a "first release"</u>?

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

It is difficult to identify the number of first releases. On the one hand, there is an issue with regard to data quality: release dates may be missing or may refer to the release date in a particular year rather than the original release date of the film. Hence, some re-releases / holdovers / festival releases may be counted as commercial first releases, and all data should be considered estimates. On the other hand, there is an inherent methodological challenge in defining a "first release" on a multi-territory basis best illustrated by the following example: A French film may have been 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 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 first released in at least one non-European market in a specific year and not released in any other non-European market before that. 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 tickets sold for the theatrical screening of a film.

What is "GBO"?

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

What is the definition of a "European film"?

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

European films produced with incoming investment from US studios such as the *Harry Potter* or the *James Bond* franchises ("INC" films as defined below) are in principle not considered European in the context of this sample. Because of their untypically high box office potential they would distort admission and global circulation statistics for 'typical' European films. In the context of this report, they are therefore 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 thus result in significant differences with publications on film exports by national sources such as the British Film Institute.

What is the definition of "Europe"?

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

Europe as a market refers to the entirety of the European markets for which at least partial admissions data are available in the Observatory's LUMIERE database (see appendix). This figure ranges between 30 and 34 European markets between 2014 and 2018.

What is an "inc" film?

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

Thus, a film categorised as "GB inc / US" is a film produced in the United Kingdom (GB) where the main producer is a United Kingdom-registered company which may be wholly or partially owned or controlled by a US company. A "FR inc / US" film is a work produced in France (FR) where the main producer is a 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. Consequently, there may be mistakes in the classification of "inc" films and the Observatory occasionally revises attribution when further information becomes available. Readers noticing an 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 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 analysis

How is the "country of origin" of a film determined?

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

Defining the nationality of a film is a complex task. There are no widely accepted international or even European definitions of the criteria to 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 that provides the majority share of production financing. The Observatory tries to list all co-producing countries in order of the size of their financial investment in the film (whether known or assumed), with the country having provided the majority financial investment in the production in first place. For example, a "FR/DE" co-production is considered a French film in the context of this report.

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

What is the definition of “co-production”?

A “co-production” is defined as a film whose production budget is financed by sources from two or more countries. The country providing the majority of the financing, namely the majority coproduction country, is considered the country of origin. In the case of a parity co-production, for example Germany 40% / France 40% / Spain 20%, the nationality of the director and 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. “AT / DE” for example 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 satisfaction of the requirements set out in the relevant co-production treaties, or those of the European Convention on Cinematographic Co-production), but also includes co-productions not necessarily registered by the national film agencies. For instance, this can be the case where national broadcasters co-produce feature films with foreign partners.

The Observatory identifies co-productions on the basis of information provided by various sources. When a new film is created the system will, by default, apply the countries of origin as indicated on IMDB. These data are subsequently checked and adjusted based on 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.

Since the Observatory does not have access to detailed production information on films, it does not claim to have correctly identified attribution in every case and occasionally revises attribution when further information becomes available. Readers noticing 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 the “national“ market of a film. All other markets are referred to as “non-national“ markets. Accordingly, “national“ admissions are defined as admissions in the country of origin of the film, that is, a 100% national or majority co-producing country. All other markets – including other (minority) co-producing countries – are considered non-national markets. For example, Spain is considered the national market for *Planet 51*, an ES/UK co-production, while the UK release is counted as a non-national release. “Non-national“ admissions are consequently admissions generated outside the national home market.

What does "worldwide" refer to?

In the context of this report, the term "worldwide" refers to the entirety of the 30 to 34 European and 15 non-European markets at least partially covered in this report.

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

In the context of this report, the terms "outside Europe" or "non-European markets" refer to the 15 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 otherwise noted, the term "average" refers to the mean value.

How reliable are the underlying data sets?

The Observatory collects data from what it considers to be the most reliable data sources in each territory. However, there can be significant differences in the coverage rates among individual markets and / or years, which may impact interpretation of the data. The coverage rates of each market for 2014 to 2018 are shown in the appendix.

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

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

How were 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 GBO 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).

2. THE BIG PICTURE 2018

2.1. Theatrical market volume of European films

Market intransparency obscures total "film market volume"

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

The theatrical cinema market is practically the only exploitation window for which reliable consumption / consumer expenditure data are available. In most countries, data for the physical video, transactional VOD, television and subscription VOD markets are either not available at all or are sold at prohibitive prices, which makes tracking them 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 of broadly speakingfour main market segments, all of which may provide relevant - though not quantifiable in the research context of this report - market potential for European films outside Europe.

Theatrical market volume of European films worldwide in 2018

Theatrical market volume can be measured in terms of film offering, that is, the number of films on release, admissions and GBO. From the title-by-title admissions data provided to the Observatory by Comscore as well as national data providers, 7 598 European films were identified as *on release*, that is, they were tracked as having sold at least one ticket for a theatrical screening in at least one of the markets covered. This figure is the highest of European films tracked as on release (see Table 2).

European films cumulatively generated about 468 million admissions, or ticket sales, in the 49 "worldwide" sample markets in 2018, which is above the five-year average. Applying annual average ticket prices, the Observatory estimates that European films earned roughly EUR 2.9 billion in GBO, more or less in line with the average 2014 to 2018 value (see Table 3).

Number of European film exports increases but export admissions decline in 2018

Practically all European **films** tracked as **on release** in 2018 were on release in at least one of the European markets (99%) while 51% of European films (3 875 films) were identified as on theatrical release in at lease one non-national market. This is the highest tracked number of film exports in the past five years (see Table 3).

More or less all of these *export films* received a release on a non-national market within Europe, while only 9% of them (696 films) were on release in at least one of the 15 non-European territories covered. This is well in line with the five-year average.

On a cumulative level, European films generated 61% of their total **admissions** on their respective national markets while exports, i.e. non-national admissions, accounted for about 39% of the overall admissions (181 million). With 287 million tickets sold, national admissions reached their highest level in the past five years. In contrast, non-national admission declined from 199 million in 2017 to 181 million, the second lowest level since 2014.

Breaking non-national admissions further down, the data show that about 94 million tickets were sold on non-national European markets while 87 million tickets were sold in the 15 non-European markets covered.

Figure 4 provides a „big picture“ overview of the volume and breakdown of worldwide market volume to European films in 2018. As mentioned above the term „worldwide“ refers to cumulative data for the 34 European and 15 non-European markets covered in this report[1]. Given this partial coverage data have to be interpreted as minimum values.

Significance of export outside Europe decreases slightly in 2018

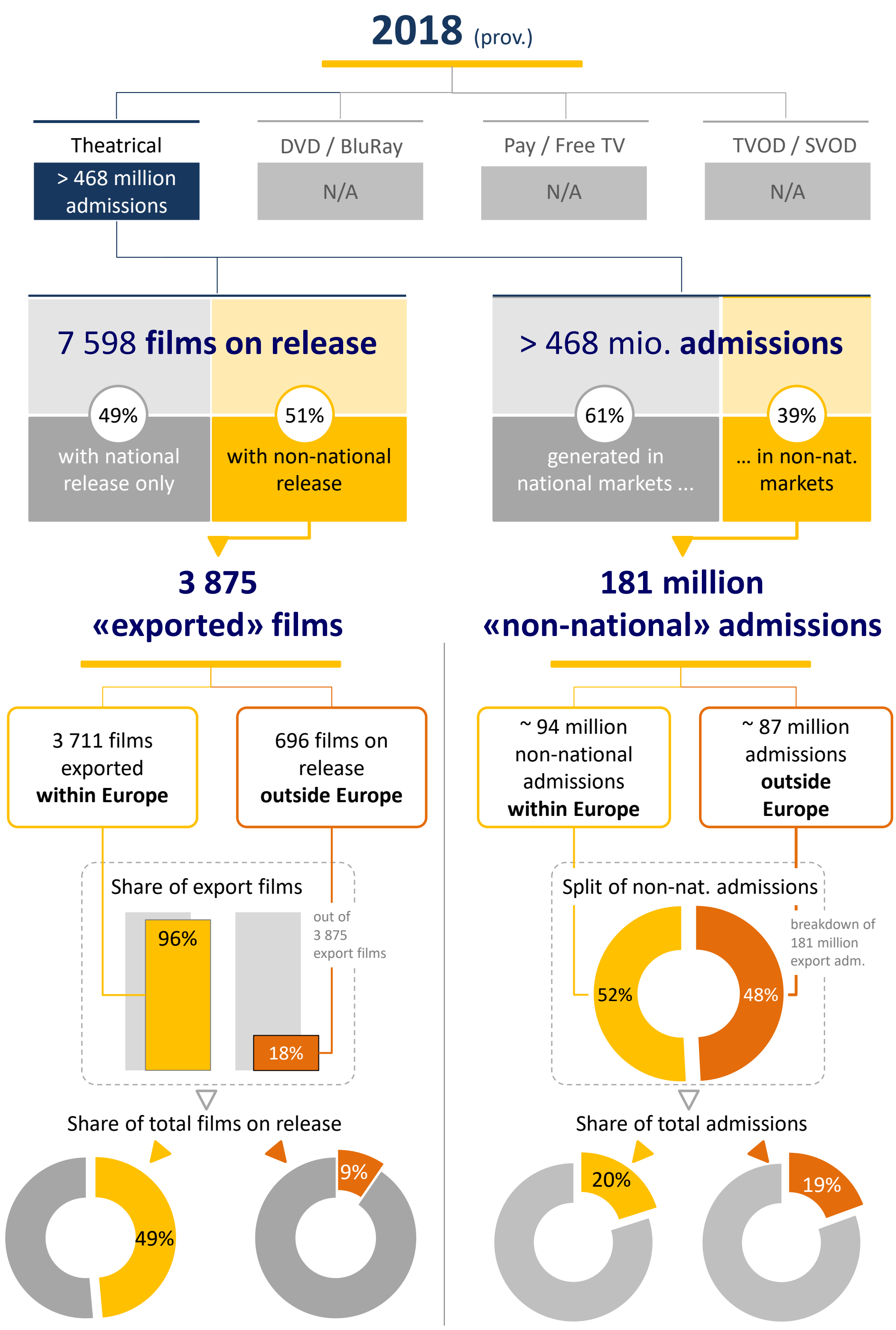
As shown in Table 3, 81 % of worldwide admissions to European films was generated in European markets, while ticket sales outside Europe accounted for 19 %. This is the second lowest share of admissions to film exports outside Europe in the past five years. In terms of GBO, the European markets accounted for an estimated 83 % of worldwide GBO in 2018 - European films are estimated to have generated 17 % of their GBO takings outside Europe, representing the lowest share during in the 2014 to 2018 period.

Nevertheless, these figures show that on a cumulative level theatrical exploitation outside Europe continued to contribute a significant share of the overall theatrical market volume of European films: in 2018, about 19% of estimated worldwide admissions and about half of non-national admissions (48%) to European films were generated outside Europe.

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

Figure 10. At a glance: "Worldwide" theatrical market volume of European films (2018)

Provisional estimates.



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 1. “National” vs. “non-national” market volume of European films (2014-2018)

As tracked in LUMIERE, with the exception of estimated admissions for HK, JP and SG for the years 2014-2016.

Films on release	2014	2015	2016	2017	2018 prov	5y avg.
“Worldwide”	**6 261**	**6 297**	**6 719**	**6 928**	**7 598**	**6 761**
In national market	4 174	4 195	4 450	4 623	5 123	4 513
In non-national market	3 260	3 236	3 532	3 605	3 875	3 502
% share national	*67%*	*67%*	*66%*	*67%*	*67%*	*67%*
% share export films	*52%*	*51%*	*53%*	*52%*	*51%*	*52%*
- Non-nat. in Europe	3 093	3 089	3 337	3 403	3 711	3 327
- Non-nat. outside Europe	589	599	650	673	696	641
% share export within Europe	*49%*	*49%*	*50%*	*49%*	*49%*	*49%*
% share outside Europe	*9%*	*10%*	*10%*	*10%*	*9%*	*10%*

Admissions (in million)	2014	2015	2016	2017	2018 prov	5y avg.
“Worldwide”	**465**	**453**	**430**	**478**	**468**	**459**
In national market	279	247	258	280	287	270
In non-national market	186	206	172	199	181	189
% share national	*60%*	*55%*	*60%*	*58%*	*61%*	*59%*
% share export films	*40%*	*45%*	*40%*	*42%*	*39%*	*41%*
- Non-nat. in Europe	101	94	87	96	94	94
- Non-nat. outside Europe	86	112	85	103	87	94
% share export within Europe	*22%*	*21%*	*20%*	*20%*	*20%*	*21%*
% share outside Europe	*18%*	*25%*	*20%*	*21%*	*19%*	*21%*

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 2. Number of European films on release by release region (2014-2018)

As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2014 to 2016).

Films on release	2014	2015	2016	2017	2018 prov	5y avg.
"Worldwide"	**6 261**	**6 297**	**6 719**	**6 928**	**7 598**	**6 746**
- In Europe	6 137	6 190	6 583	6 793	7 498	6 624
- Outside Europe	589	599	650	673	696	641
- % share in Europe	*98%*	*98%*	*98%*	*98%*	*99%*	*98%*
-% share outside Europe	*9%*	*10%*	*10%*	*10%*	*9%*	*10%*

Source: European Audiovisual Observatory / LUMIERE, Comscore

Table 3. Admissions and GBO for European films "worldwide" (2014-2018)

As tracked in LUMIERE with the exception of estimated admissions for HK, JP and SG for the years 2014-2016. GBO estimated based on average ticket prices and converted to Euros at average annual exchange rates.

Admissions (in million)	2014	2015	2016	2017	2018 prov	5y avg.
"Worldwide"	**465**	**453**	**430**	**478**	**468**	**459**
- In Europe	380	342	344	376	381	364
- Outside Europe	86	112	85	103	87	94
- % share in Europe	*82%*	*75%*	*80%*	*79%*	*81%*	*79%*
-% share outside Europe	*18%*	*25%*	*20%*	*21%*	*19%*	*21%*

GBO (in MEUR)	2014	2015	2016	2017	2018 prov	5y avg.
"Worldwide"	3 023	2 968	2 742	2 991	2 904	2 925
- In Europe	2 494	2 325	2 233	2 428	2 408	2 378
- Outside Europe	529	643	509	562	496	548
- % share in Europe	*82%*	*78%*	*81%*	*82%*	*83%*	*81%*
-% share outside Europe	*18%*	*22%*	*19%*	*18%*	*17%*	*19%*

Source: European Audiovisual Observatory / LUMIERE, Comscore

3. MARKET VOLUME OUTSIDE EUROPE IN 2018

3.1. European film releases outside Europe

As explained in the methodology section, measuring film releases, particularly across multiple territories, is a difficult exercise in which no clear-cut definitions can be applied, and no individual indicator emerges as the sole reference indicator. Consequently, two complementary indicators are analysed in the context of this report: the number of films on release and 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[2] .This represents the widest possible definition of a film release. This indicator definition also underpins 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 with a proper commercial release for the first time in a specific territory or region[3]. 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.

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

[2] Important note: Given the methodological difficulties linked to classifying films by release type (first release, holdover, re-release, etc.) the number of films "on release" provides a methodologically consistent figure which allows comparison over time. It should however be noted that the number of films on release is directly linked to the Comscore coverage rate in a specific market and year. Differing coverage rates can introduce a technical bias which may limit the ability to correctly identify trends over time. Given the lack of alternative data, the existence and / or extent of this bias cannot be evaluated by the Observatory. Details on the coverage rates for all markets and years are provided in the appendix.

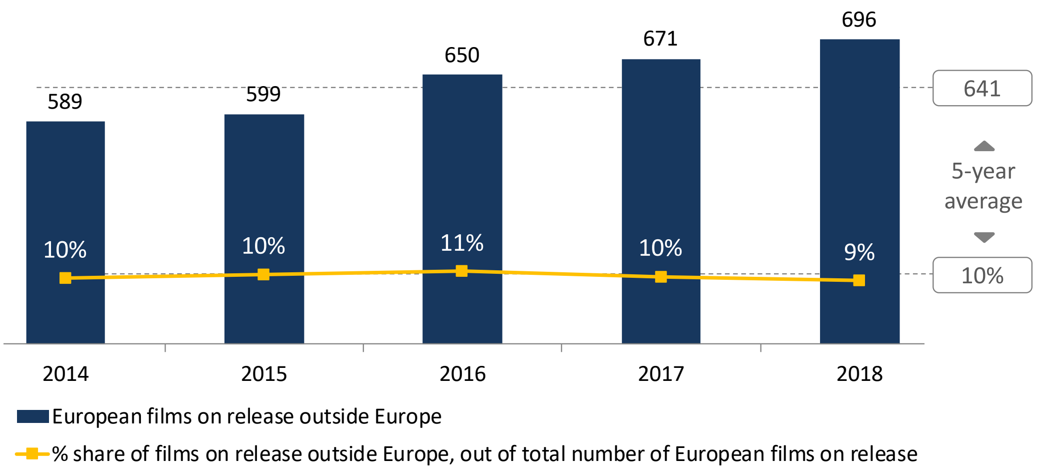
[3] Important note: Apart from the difficulties linked to defining and identifying a "proper commercial release", methodological issues arise with regard to defining a "first release" on a multi-territory basis. Two definitions are introduced in Chapter 2: a "wide definition" (films first released in at least one non-European market in a specific year) and a "narrow definition" (films first released in at least one non-European market in a specific year and never been released in any other non-European market before that). Which of the two definitions is more appropriate may differ depending on the research question to be analysed.

696 European films on release outside Europe in 2018

The number of European films on theatrical release outside Europe has been growing consistently since 2012 and reached a temporary record high in 2018 with 696 European films tracked by Comscore as 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 696 films represent 9% of the 7 598[4] of European films identified as on theatrical release in at least one of the 49 countries covered in this study. In other words, one in 10 European films tracked as on release in 2018 was screened in a cinema outside Europe.

Figure 11. Number of European films on release outside Europe (2014-2018)

As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2014 to 2016).



Note: The fact that data for Hong Kong, Japan and Singapore are only available from 2017 onwards does not limit the comparability of the number of films on release over the past five years due to the low number of European films that were exclusively on release in these three markets, and nowhere else.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

The number of European films on theatrical release outside Europe between 2014 and 2018 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 2014 to 2018, the number of European film releases grew in all international markets with the exception of the the US, Brazil, China and Venezuela.

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[4] 2018 figures are based on LUMIERE data as of 01/12/2019. Additional admissions data, particularly from declarations to the MEDIA programme, must still be imported into LUMIERE once they become available. The number of films on release is consequently expected to increase as a result of supplementary data imports.

Table 4. Number of European films on release outside Europe (2014-2018)

As tracked in LUMIERE (i.e. does not include European films exclusively released in HK, JP or SG for the years 2014 to 2016).

Markets	2014	2015	2016	2017	2018	*5y avg.*
Outside Europe	**589**	**599**	**650**	**671**	**696**	**629**
US & CA	**218**	**210**	**193**	**223**	**222**	**223**
Latin America	**318**	**376**	**418**	**374**	**376**	**348**
AU & NZ	**126**	**127**	**140**	**178**	**216**	**148**
Asia	**155**	**128**	**126**	**148**	**213**	**154**
CA	94	88	88	91	122	103
US	188	174	174	202	193	189
AR	87	117	117	108	120	101
BR	144	194	195	183	156	164
CL	40	58	58	48	74	51
CO	94	124	125	105	128	107
MX	130	160	161	134	174	139
VE	23	5	36	19	15	20
AU	110	120	120	155	198	130
NZ	72	74	74	83	94	78
CN	22	34	37	49	44	37
JP	-	-	-	32	39	36
HK	-	-	-	42	44	43
KR	142	97	97	114	117	125
SG	-	-	-	39	48	44

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Number of European first releases outside Europe increases in 2018

Applying the **narrow definition** of a "first release" (treating all non-European sample markets as one single territory), an estimated 449 European films premiered in cinemas outside Europe in 2018. In other words, 65% of the European films on release outside Europe had never been released in cinemas in any of the 15 non-European sample markets before 2018. By implication this means that 35% of the European films on release outside Europe were holdovers and / or re-releases.

As in 2016 and 2017, growth in the number of European films on release in 2018 stemmed primarily from an increasing number of first releases, while up until 2015 growth had been driven by an increasing number of holdovers and / or re-releases, rising from 169 in 2012 to 300 in 2015. The increase in the number of holdovers and / or re-releases over this time period cannot be explained with certainty. One possibility is that digital cinema has increased international demand for limited releases / screenings of holdovers or repertoire films. Another could be a shortening in the time lag for the international release of films, that is, European films released in the past two years were released internationally within one, rather than two years. Yet another, technical, reason may lie in the improved data coverage of Comscore over the years. Meanwhile, the number of other releases dropped in 2017 and 2018.

Table 5. European first releases outside Europe (narrow definition*; 2014-2018)

Estimated. As tracked in LUMIERE (does not include European films exclusively released in HK, JP or SG for the years 2014 to 2016).

	2014	2015	2016	2017	2018	5y avg.
Films on release	**589**	**599**	**650**	**671**	**696**	**629**
First releases (narrow)	300	299	361	435	449	367
Other	289	300	289	236	247	262
% share first releases	51%	50%	56%	65%	65%	58%
% share other	49%	50%	44%	35%	35%	42%

* The narrow definition of a first release refers to films first released in at least one non-European market in a specific year and never released in any other non-European market before that.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

The number of first releases is naturally slightly higher when applying the **wide definition** of a first release as it includes films which first released in one territory but also holdovers in another. In this case, an estimated 524 European films premiered in 2018 in at least one of the 15 non-European markets covered in the data sample. It follows that 75% of the European films on release outside Europe were released for the first time in at least one of the sample markets in 2018. 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*; 2014-2018)

Estimated. As tracked in LUMIERE (does not include European films exclusively released in HK, JP or SG for the years 2014 to 2016).

	2014	2015	2016	2017	2018	5y avg.
Films on release	**589**	**599**	**650**	**671**	**696**	**629**
First releases (wide)	429	415	475	493	524	477
Other	160	184	175	178	172	152
% share first releases	73%	69%	73%	73%	75%	76%
% share other	27%	31%	27%	27%	25%	24%

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

Source: European Audiovisual Observatory / LUMIERE, Comscore.

European films accounted for about 18% of the film offering outside Europe

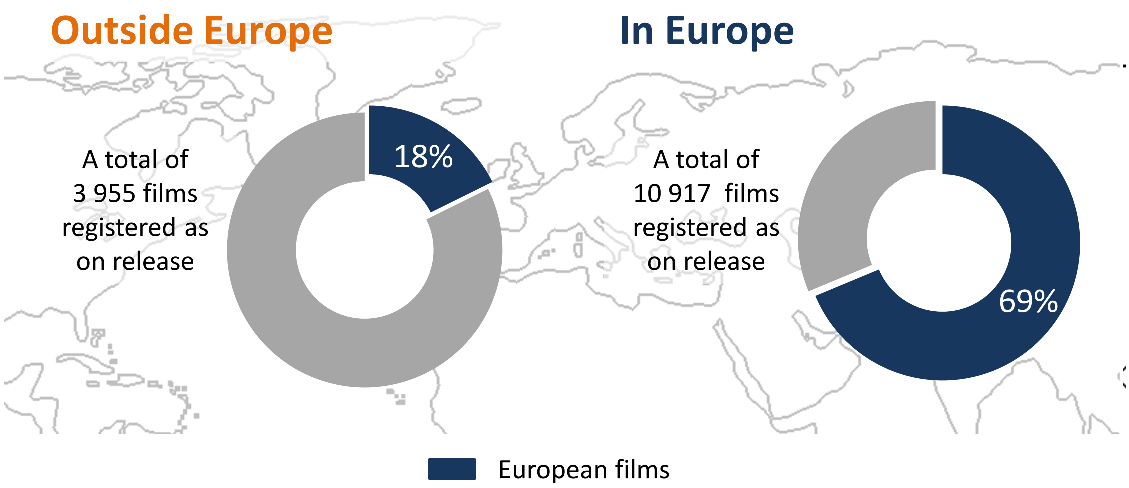
In Europe, European films accounted for 69% of the approximately 10 900 films identified as having been screened at least once in one of the 34 European markets in 2018. Outside Europe, European films accounted for 18% of the approximately 3 950 films identified as having been screened at least once in the 15 non-European markets in 2018. In other words, one out of five films on theatrical release outside Europe was of European origin.

When measured in terms of first releases, European films accounted for 19% of the approximately 2 764 films estimated to have been theatrically released for the first time in at least one[5] of the 15 non-European markets covered.

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, though, 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 not be analysed within the scope of this report.

Figure 12. Market share of European films in terms of films on release (2018)

Provisional estimates



Important note: As mentioned in the methodological remarks in Chapter 2, the number of films on release is an indicator directly linked to the coverage rates of individual markets, which can significantly limit the direct comparability of this indicator across different territories or regions. For instance, the magnitude of the difference between European and non-European markets 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 a valid indicator when estimating the share of European films as a portion of the total number of theatrical films on offer.

Source: European Audiovisual Observatory / LUMIERE, Comscore.

[5] 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 is slightly lower at 18% (449 European films out of an estimated total of 2 553 first releases outside Europe).

As shown in Table 7, the share of European films in the tracked 2018 film offering is fairly comparable from region to region, amounting to 25% in Latin America, 24% in the US / Canada, and 21% in Australia & New Zealand. Only Asia, represented by China, Hong Kong, Japan, South Korea and Singapore, stands out with a comparatively low share of European films (12%). In China, in fact, European films accounted for only 5% of the tracked film offering in 2018.

Table 7. Market share of European films in terms of films on release (2014-2018)

Estimated. As tracked in LUMIERE (does not include European films exclusively released in HK, JP or SG for the years 2014 to 2016).

Markets	2014	2015	2016	2017	2018	*5y avg.*
Outside Europe	**21%**	**20%**	**19%**	**19%**	**18%**	**19%**
US & CA	**24%**	**23%**	**21%**	**24%**	**24%**	**23%**
Latin America	**24%**	**26%**	**27%**	**25%**	**25%**	**25%**
AU & NZ	**22%**	**21%**	**21%**	**24%**	**21%**	**22%**
Asia	**16%**	**12%**	**10%**	**11%**	**12%**	**12%**
CA	20%	17%	18%	20%	22%	20%
US	23%	21%	21%	24%	24%	21%
AR	18%	23%	22%	20%	22%	20%
BR	26%	32%	30%	29%	27%	28%
CL	16%	21%	23%	20%	26%	20%
CO	27%	33%	29%	27%	29%	29%
MX	23%	28%	28%	24%	27%	25%
VE	12%	2%	14%	10%	14%	11%
AU	21%	21%	20%	23%	21%	21%
NZ	22%	21%	18%	20%	19%	21%
CN	5%	5%	4%	5%	5%	5%
HK	-	-	-	11%	13%	13%
JP	-	-	-	13%	13%	13%
KR	24%	19%	20%	23%	21%	22%
SG	-	-	-	14%	14%	14%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

3.2. Admissions to European films outside Europe

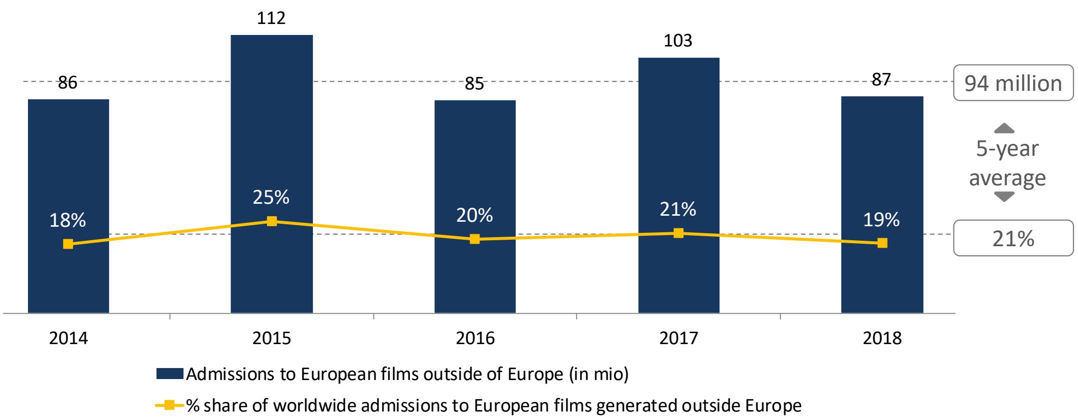
87 million tickets sold to European films outside Europe in 2018

In 2018, European films generated 87 million ticket sales in the 15 non-European markets covered. This means that at least 19% of total "worldwide" admissions to European films occurred outside Europe. This is well in line with the levels observed in 2014 and 2016 but well below the levels registered in 2015 and 2017 when a comparatively large number of European "blockbusters" boosted admissions to European films outside Europe to well-above average levels (112 million and 103 million, respectively).

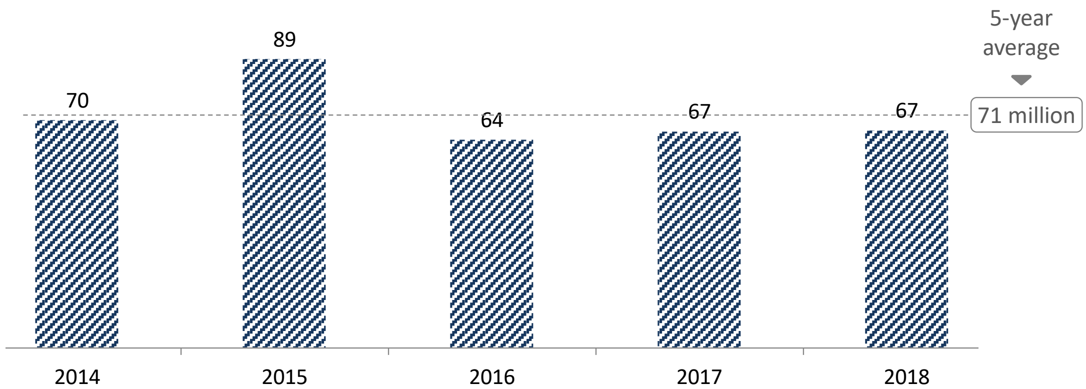
A look at the five-year time series as illustrated in Figure 7 hence suggests that the *base line* market volume for European films outside Europe amounts to around 85 million admissions per year. Higher admission levels appear to be linked to an exceptionally high number of European "blockbuster" releases: In "normal" years, between one and four European films manage to sell more than five million admissions outside Europe, while in "exceptional" years like 2015 and 2017 it was six and five such films, respectively.

Figure 13. Cumulative admissions to European films outside Europe (2014-2018)

As tracked in LUMIERE (does not include estimated admissions for HK, JP and SG for the years 2014-2016).



Pro-forma estimates for cumulative admissions in 14 non-European sample markets EXCLUDING CHINA



Source: European Audiovisual Observatory / LUMIERE, Comscore.

The success of European films in the Chinese market plays an even more decisive role in the development of overall admissions to European films outside Europe. As illustrated in Figure 7, excluding China the *base line* market volume for European films drops to 65 to 70 million admissions. Seen in this light, results from 2016 to 2018 were actually the lowest in five years due to decreasing admissions in the North American market.

In 2017,driven by the exceptional success of *Valerian and the City of a Thousand Planets (FR / CN / US / DE / AE)*, which sold over 11.3 million tickets in China, China became for the first time the largest export market for European films in terms of admissions (35.8 million). With no European blockbuster achieving comparable success in the Chinese market in 2018, (the top film *Johnny English Strikes Again* sold 'only' 5.6 million tickets), China returned to being the second most significant export market for European films in terms of admissions (20.0 million) after the US, where European films sold 26.5 million tickets in 2018.

Table 8. Admissions to European films on release outside Europe (2014-2018)

As tracked in LUMIERE with the exception of pro-forma estimates for Asian admissions for the years 2014-2016.

	2014	2015	2016	2017	2018	5y avg.
Outside Europe	**85.6**	**111.6**	**85.2**	**102.5**	**87.0**	**94.4**
US & CA	**30.7**	**42.1**	**29.8**	**27.1**	**29.3**	**31.8**
Latin America	**21.2**	**32.7**	**18.6**	**23.7**	**22.8**	**23.8**
AU & NZ	**7.0**	**5.1**	**7.4**	**5.7**	**7.3**	**6.5**
Asia	**23.1**	**28.2**	**25.8**	**40.5**	**27.6**	**29.1**
CA	3.4	4.2	3.5	3.1	2.8	3.4
US	27.4	37.9	26.2	24.0	26.5	28.4
AR	1.7	2.9	2.0	1.5	1.9	2.0
BR	6.4	8.1	3.7	3.9	4.3	5.3
CL	0.6	1.1	0.6	0.7	0.8	0.8
CO	2.2	3.8	1.8	3.0	2.9	2.8
MX	9.5	15.4	10.0	14.2	12.4	12.3
VE	0.7	1.4	0.4	0.4	0.4	0.7
AU	5.9	4.1	5.9	4.5	5.6	5.2
NZ	1.1	1.1	1.5	1.2	1.6	1.3
CN	15.5	22.7	21.2	35.8	20.0	23.0
HK	-	-	-	0.9	1.0	0.9
JP	-	-	-	2.3	2.1	2.2
KR	7.5	5.5	4.7	4.7	3.9	5.3
SG	-	-	-	0.3	0.7	0.5

Source: European Audiovisual Observatory / LUMIERE, Comscore.

The US thus accounted for an estimated 30% of cumulative admissions to European films in the 15 non-European markets covered in this report. China's share in the cumulative admissions to European films outside Europe dropped from 35% in 2017 to 23%. With regard to the importance of the Chinese market for European films, one must keep in mind that China remains accessible only for an extremely limited number of European films (30 first releases in 2018) and does not (yet) offer realistic market potential for the vast majority of European films.

Increasing somewhat year-on-year but remaining at an overall comparatively low admissions level, the North American market reclaimed its position as the most significant export region for European films, accounting for 29.3 million admissions representing 34% of total international admissions. This was just slightly ahead of Asia (32%), followed by Latin America (26%) where admissions to European films decreased from 23.7 to 22.8 million in 2018. A total of 7.3 million tickets were sold to European films in Australia and New Zealand in 2018, representing 8% of the cumulative admissions to European films outside Europe.

Table 9. Share of admissions to European films outside Europe by market (2014-2018)

As tracked in LUMIERE with the exception of pro-forma estimates for Asian admissions for the years 2014-2016.

	2014	2015	2016	2017	2018	5y avg.
Outside Europe	**85.6**	**111.6**	**85.2**	**102.5**	**87.0**	**94.4**
US & CA	**36%**	**38%**	**35%**	**26%**	**34%**	**34%**
Latin America	**25%**	**29%**	**22%**	**23%**	**26%**	**25%**
AU & NZ	**8%**	**5%**	**9%**	**6%**	**8%**	**7%**
Asia	**27%**	**25%**	**30%**	**39%**	**32%**	**31%**
CA	4%	4%	4%	3%	3%	4%
US	32%	34%	31%	23%	30%	30%
AR	2%	3%	2%	2%	2%	2%
BR	8%	7%	4%	4%	5%	6%
CL	1%	1%	1%	1%	1%	1%
CO	3%	3%	2%	3%	3%	3%
MX	11%	14%	12%	14%	14%	13%
VE	1%	1%	1%	0%	0%	1%
AU	7%	4%	7%	4%	6%	6%
NZ	1%	1%	2%	1%	2%	1%
CN	18%	20%	25%	35%	23%	24%
HK	-	-	-	1%	1%	1%
JP	-	-	-	2%	2%	2%
KR	9%	5%	6%	5%	5%	6%
SG	-	-	-	0%	1%	1%

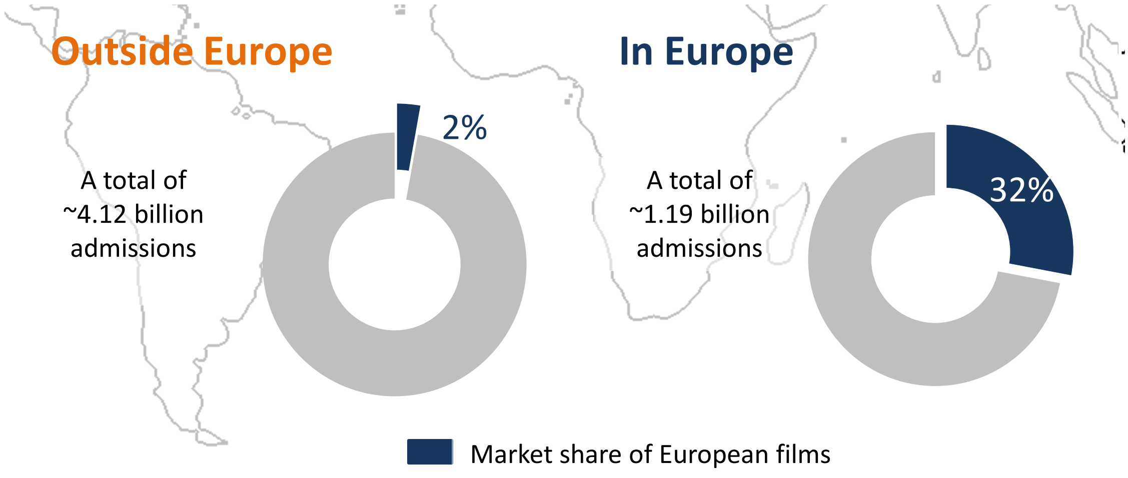
Source: European Audiovisual Observatory / LUMIERE, Comscore.

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

With 87 million admissions in 2018, European films accounted for around 2% of the cumulative 4.12 billion admissions generated by all films tracked in the 15 non-European markets covered in this report (see Figure 8). In comparison, European films claimed a market share of 32% in Europe, generating over 380 million admissions in 2018.

Figure 14. Market share of European films in terms of admissions (2018)

Estimates. As tracked in LUMIERE.



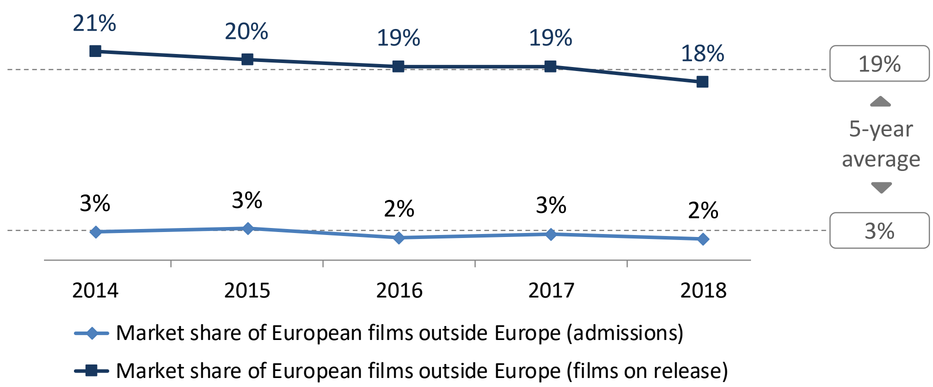
Source: European Audiovisual Observatory / LUMIERE, Comscore

As illustrated in Figure 9, the market share of European films outside Europe has declined slightly over the past five years. In terms of the number of films tracked as on release in the 15 non-European markets, European films accounted for 18% in 2018 - slightly below 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 15 non-European markets covered. Again, the 2018 market share was slightly below the five-year average value.

Figure 15. Market share of European films outside Europe (2014-2018)

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



Source: European Audiovisual Observatory / LUMIERE, Comscore.

As in past years, the highest market share of European films was registered in New Zealand (10%), followed by Australia (7%). In contrast, the lowest market shares of European films were observed in China, Japan, the US and South Korea, where European films took only 1% to 2% of respective admissions (see Table 10). A breakdown of European market share by films originating from individual European countries is shown in Table 11 overleaf.

Table 10. Market share of European films in terms of admissions (2014-2018)

As tracked in LUMIERE with the exception of pro-forma estimates for Asian admissions for the years 2014-2016.

	2014	2015	2016	2017	2018	*5y avg.*
Outside Europe	**3%**	**3%**	**2%**	**3%**	**2%**	**3%**
US & CA	**2%**	**3%**	**2%**	**2%**	**2%**	**3%**
Latin America	**4%**	**5%**	**3%**	**4%**	**4%**	**4%**
AU & NZ	**8%**	**5%**	**8%**	**6%**	**7%**	**7%**
Asia *est.*	**2%**	**2%**	**1%**	**2%**	**1%**	**2%**
CA	3%	4%	3%	3%	3%	3%
US	2%	3%	2%	2%	2%	2%
AR	4%	6%	4%	3%	4%	5%
BR	4%	5%	2%	2%	3%	3%
CL	3%	4%	2%	3%	3%	3%
CO	5%	6%	3%	5%	5%	5%
MX	4%	5%	3%	4%	4%	4%
VE	2%	5%	2%	2%	4%	3%
AU	8%	5%	7%	6%	7%	6%
NZ	10%	8%	10%	8%	10%	9%
CN	2%	2%	2%	2%	1%	2%
HK	-	-	-	4%	4%	4%
JP	-	-	-	1%	1%	1%
KR	4%	3%	2%	2%	2%	3%
SG	-	-	-	2%	4%	3%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Where did European films generate the highest market share?

Table 11. Market share in terms of admissions by region / country of origin (2018)

Estimated. Markets ranked by market share of European films.

Market	North American films	Latin American films	Asian films	Other films	European films	GB	FR	IT	ES	RU	DE	NL	Other
NZ	82%	0%	5%	3%	10%	86%	3%	4%	4%	0%	1%	0%	3%
AU	87%	0%	4%	3%	7%	82%	5%	4%	4%	1%	2%	0%	3%
CO	89%	4%	1%	1%	5%	51%	14%	2%	10%	5%	8%	4%	6%
AR	79%	15%	0%	0%	4%	38%	13%	3%	29%	1%	8%	0%	8%
HK	68%	0%	28%	0%	4%	68%	15%	7%	2%	0%	3%	0%	5%
MX	85%	9%	1%	1%	4%	49%	11%	2%	17%	3%	5%	4%	9%
SG	83%	0%	13%	0%	4%	88%	5%	2%	1%	1%	1%	0%	3%
VE	90%	6%	0%	0%	4%	43%	13%	4%	13%	0%	18%	0%	9%
CL	93%	3%	1%	1%	3%	45%	9%	2%	15%	14%	6%	3%	6%
BR	83%	14%	0%	1%	3%	43%	19%	6%	15%	1%	7%	3%	6%
CA	95%	0%	2%	0%	3%	77%	9%	7%	2%	0%	1%	0%	5%
US	96%	0%	1%	0%	2%	85%	3%	7%	0%	0%	0%	0%	4%
KR	46%	0%	52%	0%	2%	65%	6%	7%	1%	2%	6%	1%	13%
JP	42%	0%	56%	0%	1%	77%	5%	3%	3%	1%	4%	0%	6%
CN	35%	0%	64%	0%	1%	47%	16%	9%	3%	19%	5%	0%	1%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

3.3. GBO for European films outside Europe

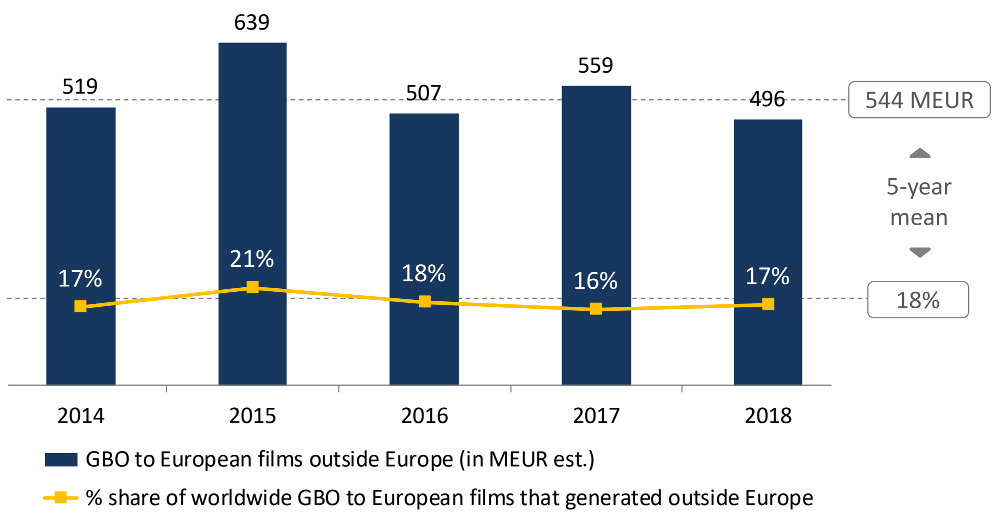
European films generated an estimated GBO of EUR 496 million outside Europe in 2018

Important note:
As mentioned in the methodological remarks in Chapter 2, LUMIERE only covers admissions but no GBO data. To provide a ballpark figure for GBO results in the context of this report, GBO figures are estimated by multiplying the average ticket price in a specific market with admissions generated in that market. These estimates naturally deviate from actual GBO takings and should be considered rough estimates.

Applying average ticket prices for the individual markets, European films generated in 2018 an estimated GBO of EUR 496 million outside Europe (see Figure 10), the lowest level in the past five years. This means that cumulatively European films earned an estimated 17% of their "worldwide" box office in 2018 outside Europe.

Figure 16. GBO for European films outside Europe (2018)

Estimated cumulative GBO for European films outside Europe in MEUR as tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, Comscore.

In terms of international GBO, the North American market - due to comparatively high ticket prices - remained by far the most significant export market for European films in 2018. At an estimated EUR 227 million, the North American market accounted for almost half (46%) of total non-European GBO for European films.

The share of the five Asian sample markets in total GBO dropped from an exceptional 40% (EUR 222 million) in 2017 to 30% (EUR 149 million) which is in line with the five-year average. Australia & New Zealand (EUR 61 million) and Latin America (EUR 58 million) followed at a distance, both representing 12% of total international GBO for European films.

Table 12 overleaf shows the five-year development of GBO in the individual non-European markets. As GBO has been estimated by applying average local ticket prices to underlying admissions, the estimated market share of European films in terms of GBO corresponds with the estimated market shares in terms of admissions as shown in Table 10 in chapter 4.2.

Table 12. GBO for European films on release outside Europe (2014-2018)

In MEUR. Estimates calculated by applying local average ticket prices to admissions as tracked in LUMIERE (with the exception of estimated admissions for HK, JP, SG for the years 2014-2016).

	2014	2015	2016	2017	2018	*5y avg.*
Outside Europe	**519**	**639**	**507**	**559**	**496**	**544**
US & CA	**222**	**319**	**231**	**216**	**227**	**243**
Latin America	**80**	**100**	**53**	**68**	**58**	**72**
AU & NZ	**67**	**44**	**65**	**52**	**61**	**58**
Asia	**150**	**175**	**157**	**222**	**149**	**171**
CA	24	32	28	25	22	26
US	197	287	204	192	206	217
AR	8	12	10	8	5	9
BR	30	30	14	16	15	21
CL	3	5	2	3	3	3
CO	8	10	5	8	7	8
MX	30	41	22	32	28	31
VE	1	3	1	1	0	1
AU	58	36	53	43	49	48
NZ	9	8	12	9	12	10
CN *est.*	80	115	97	162	91	109
HK	-	-	-	8	8	8
JP	-	-	-	20	21	20
KR	46	31	28	29	25	32
SG	-	-	-	3	4	3

Source: European Audiovisual Observatory / LUMIERE, Comscore.

4. BREAKING IT DOWN...

4.1. The most significant theatrical markets for European films outside Europe

In terms of number of releases

As first releases cumulatively accounted for 99% of total admissions to European films outside Europe in 2018, 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 13 overleaf, the US and Mexico stood out in relation to first releases, with 140 and 136 European films released for the first time in 2018, followed by Brazil (119), Australia (112), and Argentina and South Korea (107 each). The strongly regulated Chinese market as well as Venezuela featured the lowest number of European first releases, with only 30 and 111, respectively, tracked in 2018. Given the comparatively low number of holdovers / re-releases / on-demand screenings / festival releases etc. tracked in the data set[6] , the picture is quite similar in terms of the total number of films on release.

In terms of admissions and GBO

The year 2018 saw the US reclaim its long-established position as the largest export market for European films in terms of admissions, from China, which had – thanks to the exceptional success of *Valerian and the City of a Thousand Planets* – become the biggest export market for European films in 2017. In a 10% rise over 2017, European films sold 26.5 million tickets in the US in 2018, representing 30% of total admissions to European films outside Europe. This compares to 20.0 million admissions in China (23%) where ticket sales to European films dropped below the five-year average in 2018. At 14% (12.4 million), Mexico came third, ahead of, much further back, Australia (5.6 million) and Brazil (4.3 million).

Thanks to comparatively high average ticket prices, the US confirmed its position as the largest export market by far for European films in terms of GBO takings. Based on the data available, the Observatory estimates that European films took EUR 206 million at the US box office, accounting for 41% of total non-European GBO takings. In 2018, China followed at a distance with EUR 91 million, representing 18% of total international GBO takings of European films, but still far ahead of Australia (10%, EUR 49 million), Mexico (6%; EUR 28 million) and South Korea (5%, EUR 25 million).

[6] This can indicate a smaller offering of “repertoire” films outside Europe and / or less comprehensive coverage of these films with regard to data collection.

Table 13. Number of European film releases outside Europe (2018)

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

#	Market	First releases (est.)	Other releases[1] (est.)	Films on release
1	US - USA	**140**	53	193
2	MX - Mexico	**136**	38	174
3	BR - Brazil	**119**	37	156
4	AU - Australia	**112**	86	198
5	AR - Argentina	**107**	13	120
6	KR - South Korea	**107**	10	117
7	CO - Colombia	**105**	23	128
8	CA - Canada	**100**	22	122
9	NZ - New Zealand	**77**	17	94
10	CL - Chile	**68**	6	74
11	SG - Singapore	**44**	4	48
12	JP - Japan	**41**	3	44
13	HK - Hong Kong	**37**	2	39
14	CN - China	**30**	14	44
15	VE - Venezuela	**11**	4	15
	Total outside Europe	**524**	172	696

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

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 14. Admissions & GBO for European films outside Europe (2018)

Ranked by total admissions. Admissions in million. GBO in MEUR estimated based on average ticket prices.

#	Market	Adm. to first releases	Adm. to other releases	Total adm.	%	GBO (in MEUR)	%
	US & CA	22.9	6.3	**29.3**	**34%**	227.4	46%
	Latin America	22.3	0.5	**22.8**	**26%**	58.5	12%
	AU & NZ	6.5	0.7	**7.3**	**8%**	61.2	12%
	Asia	27.2	0.4	**27.6**	**32%**	149.1	30%
1	US - USA	20.6	5.9	**26.5**	**30%**	205.8	41%
2	CN - China	19.7	0.3	**20.0**	**23%**	90.8	18%
3	MX - Mexico	12.1	0.3	**12.4**	**14%**	27.9	6%
4	AU - Australia	5.0	0.6	**5.6**	**6%**	49.4	10%
5	BR - Brazil	4.2	0.2	**4.3**	**5%**	15.1	3%
6	KR - South Korea	3.9	0.1	**3.9**	**5%**	25.3	5%
7	CO - Colombia	2.9	0.0	**2.9**	**3%**	6.8	1%
8	CA - Canada	2.4	0.4	**2.8**	**3%**	21.6	4%
9	JP - Japan	2.0	0.0	**2.1**	**2%**	20.7	4%
10	AR - Argentina	1.9	0.0	**1.9**	**2%**	5.2	1%
11	NZ - New Zealand	1.5	0.1	**1.6**	**2%**	11.8	2%
12	HK - Hong Kong	1.0	0.0	**1.0**	**1%**	8.2	2%
13	CL - Chile	0.8	0.0	**0.8**	**1%**	3.4	1%
14	SG - Singapore	0.7	0.0	**0.7**	**1%**	4.1	1%
15	VE - Venezuela	0.4	0.0	**0.4**	**0%**	0.0	0%
	Outside Europe	**85.8**	**1.2**	**87.0**	**100%**	**496.2**	**100%**

Source: European Audiovisual Observatory, Comscore.

4.2. The leading European film export countries

Important note: As specified in the methodological remarks, this report focuses on providing a 'big picture' overview of the circulation of European films as a whole, rather than analysing the film exports of individual European countries, which is beyond the scope of this report as it could 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 proper analysis of the export of films originating from a specific country, please refer to national sources.

In terms of releases

The 696 European films on release outside Europe in 2018 originated from 33 European countries. However, the top 10 countries accounted for 85% of European films on release outside Europe. As in past years, France and the UK exported by far the largest number of films to non-European territories among all European countries. As shown in Table 15 overleaf, France led both in terms of first releases as well as total films on release, with 142 French first releases in 2018 and a total of 191 French films on release in at least one of the 15 non-European markets covered in this report. Next comes the UK with 117 first releases outside Europe and a total of 163 films on release. On a cumulative basis, French and UK films accounted for 50% of the total number of European films on release outside Europe. In other words, as in past years, one out of two European films screened outside Europe in 2017 was majority produced in either France or the UK.

In 2018, Germany ranked third with 45 first releases and a total of 55 films on release, followed by Spain and Italy with 44 and 31 first releases and a total 51 and 49 films on release, respectively. Only three other countries – Russia (21 first releases), Ireland (13) and Sweden (10) had 10 or more of their films released for the first time in at least one of the 15 non-European markets covered in this report, although Switzerland and Norway came close with nine first releases outside Europe.

In terms of admissions

The picture is even more concentrated when it comes to admissions generated by European films. In 2018, UK films alone accounted for 64% of total admissions to European films outside Europe, followed at a distance by French films (10%) which performed comparatively poorly that year. Together, UK and French films hence accounted for 74% of total admissions to European films outside Europe in 2018. This is significantly higher than in 2017 (66%) but well in line with figures for 2016 (72%) and even low compared to 2015 (87%).

The dominance of UK films is naturally linked to the proliferation of UK films among the top 20 European films in terms of international admissions[7]: in 2018, UK films accounted for eight out of the top 10 and 13 out of the top 20 European export films, respectively. As shown in Table 15, UK films cumulatively sold 56.0 million tickets outside Europe, outdistancing all other European countries. France came second with 'only' 8.3

[7] See Table 31 on p.57 for a list of the top 100 European films in terms of admissions generated outside Europe.

million tickets sold outside Europe, ahead of Italy (5.2 million), Spain (4.9 million), Russia (4.6 million) and Germany (3.0 million).

Table 15. Number of European film releases outside Europe by country of origin (2018)

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

Rank	Country of origin	First release (est.)	Other releases (est.)	Films on release outside Europe	*% share*
1	FR - France	142	49	**191**	**27%**
2	GB - United Kingdom	117	46	**163**	**23%**
3	DE - Germany	45	10	**55**	**8%**
4	ES - Spain	44	7	**51**	**7%**
5	IT - Italy	31	18	**49**	**7%**
6	RU - Russia	21	5	**26**	**4%**
7	IE - Ireland	13	5	**18**	**3%**
8	SE - Sweden	10	4	**14**	**2%**
9	BE - Belgium	8	5	**13**	**2%**
10	CH - Switzerland	9	3	**12**	**2%**
11	PT - Portugal	8	2	**10**	**1%**
12	NO - Norway	9		**9**	**1%**
	PL - Poland	8	1	**9**	**1%**
	FI - Finland	5	4	**9**	**1%**
15	DK - Denmark	6	2	**8**	**1%**
	TR - Turkey	8		**8**	**1%**
	AT - Austria	7	1	**8**	**1%**
18	HU - Hungary	6	1	**7**	**1%**
	CZ - Czech Republic	3	4	**7**	**1%**
20	NL - Netherlands	4	2	**6**	**1%**
	BG - Bulgaria	4		**4**	**1%**
22	RO - Romania	3		**3**	**0%**
	IS - Iceland	3		**3**	**0%**
	RS - Serbia	2	1	**3**	**0%**
25	SU - Soviet Union		2	**2**	**0%**
26	GR - Greece	1		**1**	**0%**
	SK - Slovak Rep.	1		**1**	**0%**
	VA - Vatican	1		**1**	**0%**
	UA - Ukraine	1		**1**	**0%**
	EE - Estonia	1		**1**	**0%**
	BY - Belarus	1		**1**	**0%**
	BA - Bosnia Herzegovina	1		**1**	**0%**
	GE - Georgia	1		**1**	**0%**
	Total Europe	**524**	**172**	**696**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 16. Admissions to European films outside Europe by country of origin (2018)

Ranked by total admissions outside Europe as tracked in LUMIERE.

Rank	Country of origin	Admissions to first releases (est.)	Admissions to other releases (est.)	Admissions outside Europe	% share
1	GB - United Kingdom	55 094 595	912 187	**56 006 782**	**64%**
2	FR - France	8 202 280	63 910	**8 266 190**	**10%**
3	IT - Italy	5 193 790	24 446	**5 218 236**	**6%**
4	ES - Spain	4 921 381	3 356	**4 924 737**	**6%**
5	RU - Russia	4 522 823	88 770	**4 611 593**	**5%**
6	DE - Germany	3 039 788	6 190	**3 045 978**	**4%**
7	NL - Netherlands	748 014	537	**748 551**	**1%**
8	IE - Ireland	596 455	10 554	**607 009**	**1%**
9	IS - Iceland	494 025		**494 025**	**1%**
10	PL - Poland	407 508	100	**407 608**	**0%**
11	SE - Sweden	359 924	5 534	**365 458**	**0%**
12	CH - Switzerland	264 987	3 190	**268 177**	**0%**
13	DK - Denmark	266 676	241	**266 917**	**0%**
14	UA - Ukraine	264 316		**264 316**	**0%**
15	VA - Vatican	237 373		**237 373**	**0%**
16	NO - Norway	183 167		**183 167**	**0%**
17	TR - Turkey	170 944		**170 944**	**0%**
18	AT - Austria	150 189	661	**150 850**	**0%**
19	BG - Bulgaria	149 186		**149 186**	**0%**
20	FI - Finland	138 668	1 779	**140 447**	**0%**
21	HU - Hungary	138 932	830	**139 762**	**0%**
22	CZ - Czech Republic	97 939	6 183	**104 122**	**0%**
23	BE - Belgium	56 561	28 582	**85 143**	**0%**
24	PT - Portugal	58 061	44	**58 105**	**0%**
25	RS - Serbia	9 914	1 870	**11 784**	**0%**
26	SU - Soviet Union		8 740	**8 740**	**0%**
27	RO - Romania	6 334		**6 334**	**0%**
28	SK - Slovak Rep.	4 486		**4 486**	**0%**
29	BY - Belarus	3 899		**3 899**	**0%**
30	GR - Greece	2 610		**2 610**	**0%**
31	EE - Estonia	1 978		**1 978**	**0%**
32	BA - Bosnia Herzegovina	1 041		**1 041**	**0%**
33	GE - Georgia	237		**237**	**0%**
	Total Europe	**85 788 081**	**1 167 704**	**86 955 785**	**100%**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

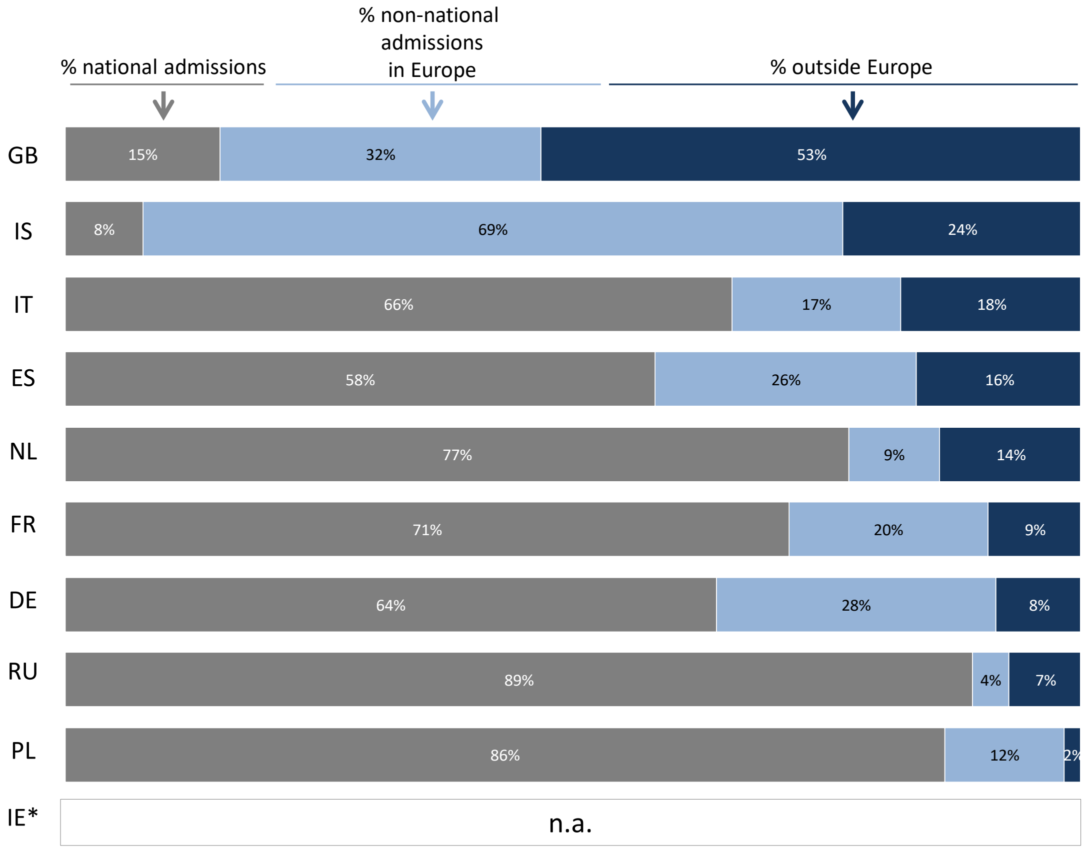
In terms of significance of non-European markets

How important are admissions outside Europe for the various European countries? Figure 11 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 16 on the previous page. The complete breakdown for all European countries can be found in Table 15 overleaf.

In contrast to previous years, only one out of the top 10 European film exporting countries, namely the UK, generated more than a third of its estimated worldwide theatrical admissions in 2018 in the 15 non-European markets covered in this report. Drawing 53% of its worldwide ticket sales outside Europe, the UK clearly had the highest exposure to non-European markets, followed by Iceland whose film productions generated 24% of their worldwide admissions outside Europe, Italy (18%), Spain (16%) and the Netherlands (14%). For the remaining top exporting countries, admissions outside Europe contributed less than 10% to their estimated worldwide admissions. The share of international admissions could not be estimated for Ireland due to the lack of separate admissions data for the Irish market, which is generally reported together with the UK market.

Figure 17. Breakdown of "worldwide" admissions for the top 10 European film exporting countries by origin of admissions generation (2018)

Ranked by estimated share of admissions outside Europe.



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

Source: European Audiovisual Observatory / LUMIERE, Comscore

Table 17. Admissions breakdown for European films: “national” vs. “non-national” (2018)

Estimated. Ranked alphabetically. As tracked in LUMIERE.

Country of origin		% Share – national adm.	% Share - non-nat. adm.	*% Share – non-nat. adm. in Europe*	*% Share – non-nat. adm. outside Europe*
AT	AT - Austria	46%	54%	41%	13%
BA	BA - Bosnia Herzegovina	3%	97%	97%	1%
BE	BE - Belgium	40%	60%	58%	2%
BG	BG - Bulgaria	59%	41%	19%	23%
CH	CH - Switzerland	52%	48%	29%	19%
CY	CY - Cyprus	17%	83%	83%	0%
CZ	CZ - Czech Republic	78%	22%	19%	2%
DE	DE - Germany	64%	36%	28%	8%
DK	DK - Denmark	65%	35%	30%	5%
EE	EE - Estonia	74%	26%	26%	0%
ES	ES - Spain	58%	42%	26%	16%
FI	FI - Finland	86%	14%	8%	6%
FR	FR - France	71%	29%	20%	9%
GB	GB - United Kingdom	15%	85%	32%	53%
GR	GR - Greece	93%	7%	6%	0%
HR	HR - Croatia	71%	29%	29%	0%
HU	HU - Hungary	69%	31%	21%	9%
IS	IS - Iceland	8%	92%	69%	24%
IT	IT - Italy	66%	34%	17%	18%
LT	LT - Lithuania	97%	3%	3%	0%
LU	LU - Luxembourg	75%	25%	25%	0%
LV	LV - Latvia	99%	1%	1%	0%
MK	MK - North Macedonia	61%	39%	39%	0%
NL	NL - Netherlands	77%	23%	9%	14%
NO	NO - Norway	73%	27%	22%	4%
PL	PL - Poland	86%	14%	12%	2%
PT	PT - Portugal	72%	28%	12%	16%
RO	RO - Romania	87%	13%	12%	1%
RU	RU - Russia	89%	11%	4%	7%
SE	SE - Sweden	47%	53%	42%	11%
SI	SI - Slovenia	99%	1%	1%	0%
SK	SK - Slovak Rep.	64%	36%	34%	2%
TR	TR - Turkey	97%	3%	2%	0%
	Total Europe	**61%**	**39%**	***20%***	***19%***

Note: This breakdown cannot be provided for the following countries due to a lack of (sufficient) 2018 admissions data in their respective home markets in the LUMIERE database: Albania (AL), Armenia (AM), Azerbaijan (AZ), Belarus (BY), Georgia (GE), Ireland (IE), Kosovo (XK), Liechtenstein (LI), Serbia (RS), Sweden (SE) and Ukraine (UA).

Source: European Audiovisual Observatory / LUMIERE, Comscore.

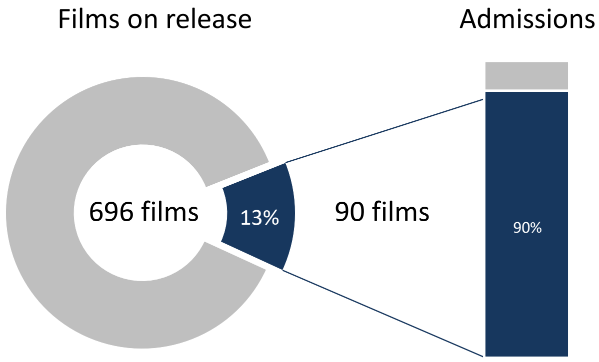
4.3. Concentration of admissions outside Europe

The cumulative figures for European films do not of course 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 12, 90 films - 13% of the 696 films on release - accounted for 90% of total admissions generated by European films outside Europe in 2018. In other words, nine out of 10 tickets sold for European films outside Europe were sold for a screening of one of only 90 European films, which cumulatively generated 73.4 million ticket sales. The remaining 606 European films on release (87% of the total number of European films on release outside Europe) cumulatively generated only 13.6 million admissions.

Figure 18. Concentration of admissions to European films outside Europe (2018)

As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, Comscore.

78% of European films sold fewer than 50 000 tickets outside Europe in 2018

Yet another way to look at the concentration of admissions among the various European films is to count the number of films by admission brackets. As can be seen in Table 18 overleaf, eight out of 10 European films (78%) generated fewer than 50 000 admissions outside Europe and one in four European film exports (26%) even sold fewer than 1 000 tickets outside Europe in 2018.

Compared to 2017, the number of European *blockbuster films* selling more than five million tickets outside Europe decreased from five to four films. The time series depicted in Table 19 suggests that the years 2015 and 2017, with six and five such European blockbusters, respectively, were exceptional - in an average year, the number ranges between one and four. Another 12 European films sold between one and five million tickets in 2018, in line with the five-year average, while the number of films selling between 500 000 and one million tickets (21) was well above the five-year average. As in 2017, an exceptionally high number of European films sold between 100 000 and 500 000 admissions (68 films).

Table 18. Number of and admissions to European films by "admission brackets" (2018)

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

Admission bracket	Number of films	% *Share*	Cumulative admissions outside Europe (in million)	% *Share*	Average admissions within bracket
[5 mio - [	4	1%	31.7	36%	7. 9 million
[1 mio - 5 mio[	12	2%	19.4	22%	1.6 million
[500' - 1 mio[	21	3%	14.1	16%	670 000
[100' - 500'[	68	10%	14.4	17%	210 000
[50' - 100'[	47	7%	3.2	4%	68 000
[10' - 50'[	138	20%	3.3	4%	24 000
[1' - 10'[	225	32%	0.8	1%	3 800
[1 - 1'[	181	26%	0.1	0%	280
Total	**696**	**100%**	**87.0**	**100%**	**125 000**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 19. Number of European films by "admission bracket (2014-2018)

As tracked in LUMIERE (Does not include data for HK, JP and SG for the years 2014 to 2017).

Admission bracket	2014	2015	2016	2017	2018	5-year average
[5 mio. - [	1	6	3	5	4	4
[1 mio - 5 mio[	12	8	16	12	12	12
[500' - 1 mio[	13	13	18	12	21	15
[100' - 500'[	49	41	44	65	68	53
[50' - 100'[	29	40	33	31	47	36
[10' - 50'[	113	113	112	116	138	118
[1' - 10'[	210	191	220	229	225	215
[1 - 1'[	162	187	204	201	181	187
Total	**589**	**599**	**650**	**671**	**696**	**641**

Source: European Audiovisual Observatory / LUMIERE, Comsccore.

Table 20. Admissions to European films by “admission brackets” (2014-2018)

In million. As tracked in LUMIERE (Does not include data for HK, JP and SG for the years 2014 to 2017).

Admission bracket	2013	2014	2015	2016	2017	5-year average
[5 mio. - [	31.9	66.8	19.2	44.8	31.7	38.9
[1 mio. - 5 mio.[	24.6	15.6	34.5	22.9	19.4	23.4
[500' - 1 mio.[	8.8	8.9	11.8	8.3	14.1	10.4
[100' - 500'[	11.2	10.5	10.4	15.2	14.4	12.3
[50' - 100'[	2.1	2.8	2.4	2.2	3.2	2.5
[10' - 50'[	2.6	2.6	2.4	2.6	3.3	2.7
[1' - 10'[	0.8	0.7	0.9	0.9	0.8	0.8
[1 - 1'[	0.1	0.1	0.1	0.1	0.1	0.1
Total	**82.0**	**108.2**	**81.6**	**96.9**	**87.0**	**91.1**

Source: European Audiovisual Observatory / LUMIERE, Comscore

Table 21. Share of admissions to European films by “admission bracket” (2014-2018)

In % of annual total. As tracked in LUMIERE (Does not include data for HK, JP and SG for the years 2014 to 2017).

Admissions bracket	2014	2015	2016	2017	2018	5-year average
[5 mio. - [	39%	62%	24%	46%	36%	41%
[1 mio. - 5 mio.[	30%	14%	42%	24%	22%	27%
[500' - 1 mio.[	11%	8%	14%	9%	16%	12%
[100' - 500'[	14%	10%	13%	16%	17%	14%
[50' - 100'[	3%	3%	3%	2%	4%	3%
[10' - 50'[	3%	2%	3%	3%	4%	3%
[1' - 10'[	1%	1%	1%	1%	1%	1%
[1 - 1'[	0%	0%	0%	0%	0%	0%
Total (in mio.)	**82.0**	**108.2**	**81.6**	**96.9**	**87.0**	**91.1**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Top 10 films accounted for 50% of total int. admissions to European films

Another way to measure admission concentration levels is shown in Table 22 which measures cumulative market share for various “top brackets”: with 9.56 million admissions, *Johnny English Strikes Again*, the most successful European film outside Europe in 2018, accounted, alone, for 1% of cumulative admissions to European films in the 15 non-European markets covered. The top 10 films (1% of the European films on release outside Europe) cumulatively accounted for 50% of total international admissions, the top 50 films for 81% and the top 100 films for 91%.

Table 22. Number of and admissions to European films by “top brackets” (2018)

In million. As tracked in LUMIERE. Cumulative admissions indicated in million.

Top bracket	Number of films	*% Share*	Cumulative admissions outside Europe (in million)	*% Share*	Average admissions within bracket
Top 1 film	1	0%	9.6	11%	9.6 million
Top 10 films	10	1%	43.8	50%	4.4 million
Top 50 films	50	7%	70.3	81%	1.4 million
Top 100 films	100	14%	79.1	91%	791 000
Other	596	86%	7.9	9%	13 000
Total	**696**	**100%**	**87.0**	**100%**	**125 000**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 23. Admissions to European films by “top brackets” (2014-2018)

In million. As tracked in LUMIERE. Does not include data for HK, JP and SG for the years 2014 to 2017.

Top bracket	2014	2015	2016	2017	2018	5-year average
Top 1	31.9	25.6	7.2	19.0	9.6	18.7
Top 10	53.1	76.9	41.2	58.7	43.8	54.7
Top 50	72.7	99.1	70.6	83.9	70.3	79.3
Top 100	78.4	104.3	77.5	91.7	79.1	86.2
Other	3.7	3.8	4.1	5.2	7.9	4.9
Total	**82.0**	**108.2**	**81.6**	**96.9**	**87.0**	**91.1**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

As shown in Table 24, these concentration levels are well below those for 2014, 2015 and 2017, which featured a much higher concentration of admissions particularly among the top 10 films. Like 2016, 2018 was a year with a comparatively more diversified distribution of international admissions among European export films.

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 in 2018. The two can therefore not be directly compared.

Table 24. Share of admissions to European films by "top brackets" (2014-2018)

In % of annual total. As tracked in LUMIERE (Does not include data for HK, JP and SG for the years 2014 to 2017).

Top bracket	2014	2015	2016	2017	2018	5-year average
Top 1	39%	24%	9%	20%	11%	20%
Top 10	65%	71%	50%	61%	50%	59%
Top 50	89%	92%	87%	87%	81%	87%
Top 100	96%	96%	95%	95%	91%	94%
Other	4%	4%	5%	5%	9%	5%
Total (in mio.)	**82.0**	**108.2**	**81.6**	**96.9**	**87.0**	**91.1**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

4.4. 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, the term "film offering" refers to the number of films on release, which is the most basic indicator for measuring the theatrical film offering in a country and - in itself - has limited informational value with regard to how many European films were really accessible to audiences. There are, however, a few aspects that can be addressed by an analysis of the data sample, such as the question of 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 production.

European film portfolio varies significantly from one market to the next

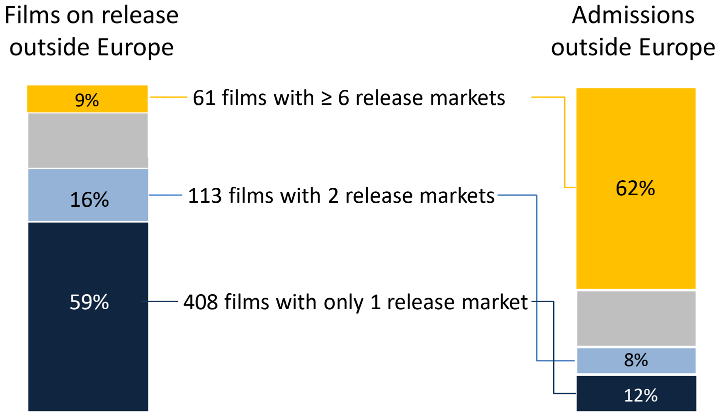
As illustrated in Figure 13 and Table 25 overleaf, 59% of the 696 European films on theatrical release outside Europe in 2018 were screened in only a single territory (408 films). Another 113 films (16%) were on release in only two markets. This means that three out of four European export films were screened in only one or two of the 15 non-European markets covered in this report. Conversely, only one in four European export films was screened in three or more international markets in 2018. In fact, only 61 European films, or 9% of European film export films, were on release in six or more non-European markets, cumulatively capturing 62% of total admissions to European films outside Europe.

Given the fact that no title-by-title data for Hong Kong, Japan and Singapore were available for the years 2014 to 2017, the comparison of the number of films per release market bracket over the past five years offers only indications but no conclusive observations[8]. Having said this, the big picture insight is unchanged: despite consistent albeit modest growth, only a very small number of European films were released in a large number of non-European territories; the vast majority of export films were released in only one or two markets. Implicitly, this signifies that the portfolio of European films on release outside Europe actually varies to a great extent from one territory to another.

[8] The data show that while the number of European films released in six or more international markets in 2018 was significantly above the five-year average (possibly due, only, to the addition of three sample markets; see Table 25), the share of admissions generated by these films (62%) was well in line with the levels of 2016 and 2017 and low compare to 2014 and 2015. As in 2016, the share of European films released in only one market outside Europe (12%) was well above the five-year average.

Figure 19. Share of European films with only 1 or 2 non-European release markets (2018)

As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 25. Concentration of European films outside Europe by number of release markets (2018)

As tracked in LUMIERE. Cumulative admissions in million.

Nr. of non-European release markets	European films	% Share	Cumulative admissions	% Share	Average admissions
1	408	59%	10.2	12%	24 964
2	113	16%	7.3	8%	64 614
3	56	8%	5.8	7%	103 735
4	36	5%	6.7	8%	185 385
5	22	3%	2.8	3%	128 082
6	17	2%	3.6	4%	212 081
7	11	2%	3.4	4%	313 289
8	12	2%	5.0	6%	417 869
9	4	1%	2.5	3%	615 411
10	8	1%	2.3	3%	288 094
11	2	0%	0.8	1%	420 294
12	-	-	-	-	-
13	3	0%	12.0	14%	4 012 020
14	2	0%	9.2	11%	4 590 986
15	2	0%	15.3	18%	7 638 679
Total	**696**	**100%**	**87.0**	**100%**	**124 936**
6 or more	**61**		**54**		**888 006**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 26. European film releases outside Europe by number of release markets (2014-2018)

As tracked in LUMIERE (Does not include data for HK, JP and SG for the years 2014 to 2017).

Nr. of non-European release markets	2014	2015	2016	2017	2018	5-year average
1	368	365	427	434	408	400
2	98	97	89	102	113	100
3	47	46	53	48	56	50
4	29	26	21	25	36	27
5	11	20	20	24	22	19
6	14	10	8	13	17	12
7	7	10	8	10	11	9
8	6	7	5	3	12	7
9	4	8	7	7	4	6
10	3	3	6	3	8	5
11	1	3	5	-	2	3
12	1	4	1	2	-	2
13	-	-	-	-	3	0
14	-	-	-	-	2	2
15	-	-	-	-	2	2
Total	**589**	**599**	**650**	**671**	**696**	**641**
6 or more	**36**	**45**	**40**	**38**	**61**	**44**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 27. Admissions to European films outside Europe by number of release markets (2014-2018)

In million. As tracked in LUMIERE (Does not include data for HK, JP and SG for the years 2014 to 2017).

Nr. of non-European release markets	2014	2015	2016	2017	2018	5-year average
1	4.9	4.7	10.3	5.4	10.2	7.1
2	5.0	8.0	5.4	7.3	7.3	6.6
3	7.6	3.0	4.5	10.6	5.8	6.3
4	5.6	1.5	9.3	10.3	6.7	6.7
5	3.5	3.5	1.9	6.5	2.8	3.6
6	2.3	2.5	5.5	7.1	3.6	4.2
7	3.0	12.9	1.8	1.7	3.4	4.6
8	4.2	3.9	3.3	7.9	5.0	4.9
9	6.5	9.7	12.8	12.6	2.5	8.8
10	3.7	8.4	7.0	2.1	2.3	4.7
11	3.7	4.2	16.5	0.0	0.8	5.0
12	31.9	45.9	3.3	25.4	-	26.6
13	-	-	-	-	12.0	12.0
14	-	-	-	-	9.2	9.2
15	-	-	-	-	15.3	15.3
Total	**82.0**	**108.2**	**81.6**	**96.9**	**87.0**	**91.1**
6 or more	**55.4**	**87.5**	**50.1**	**56.8**	**54.2**	**60.8**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 28. Share of int. admissions to European films by number of release markets (2014-2018)

In %. As tracked in LUMIERE (Does not include data for HK, JP and SG for the years 2014 to 2017).

Nr. of non-European release markets	2014	2015	2016	2017	2018	5-year median
1	6%	4%	13%	6%	12%	8%
2	6%	7%	7%	8%	8%	7%
3	9%	3%	6%	11%	7%	7%
4	7%	1%	11%	11%	8%	8%
5	4%	3%	2%	7%	3%	4%
6	3%	2%	7%	7%	4%	5%
7	4%	12%	2%	2%	4%	5%
8	5%	4%	4%	8%	6%	5%
9	8%	9%	16%	13%	3%	10%
10	5%	8%	9%	2%	3%	5%
11	5%	4%	20%	0%	1%	6%
12	39%	42%	4%	26%	-	28%
13	-	-	-	-	14%	14%
14	-	-	-	-	11%	11%
15	-	-	-	-	18%	18%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
6 or more	**68%**	**81%**	**61%**	**59%**	**62%**	**66%**

Source: European Audiovisual Observatory / LUMIERE, Comscore.

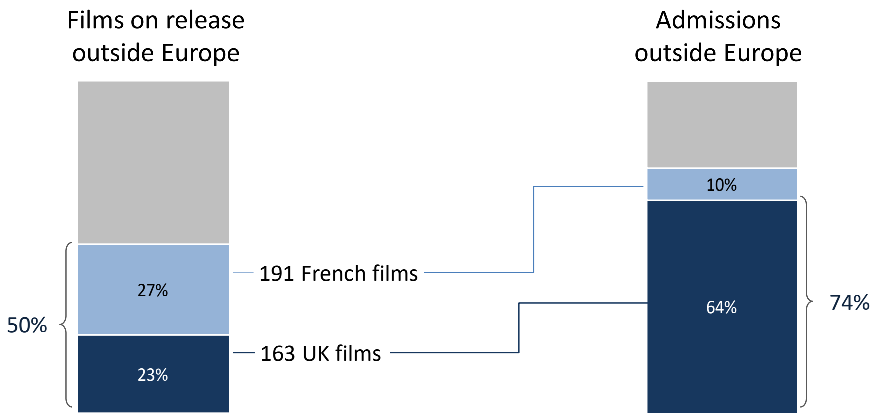
French and UK films represent majority of European film exports+ outside Europe

The breakdown of the number of European films on release as well as admissions to them by country of origin has already been discussed in Chapter 5.2. In the context of the *diversity* of the European theatrical film offering outside Europe, it can be noted that, as in past years, France and the UK exported by far the largest number of films among the European countries, cumulatively accounting for every second European film (50%) screened outside Europe in 2018 (see Figure 14).

In terms of admissions, UK and French films cumulatively accounted for 74% of total admissions to European films outside Europe in 2018. In other words, three out of four tickets sold for European films were for UK or French films. In the case of 2018, the lion's share of admissions went to UK films, which captured 64% of total admissions to European films outside Europe in 2018. These concentration levels are high compared to 2017 and 2014, but comparable to 2016 (72%) and 2015 (87%).

Figure 20. Share of French and UK films in non-European markets (2018)

Estimated. As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Recent productions account for 97% of admissions

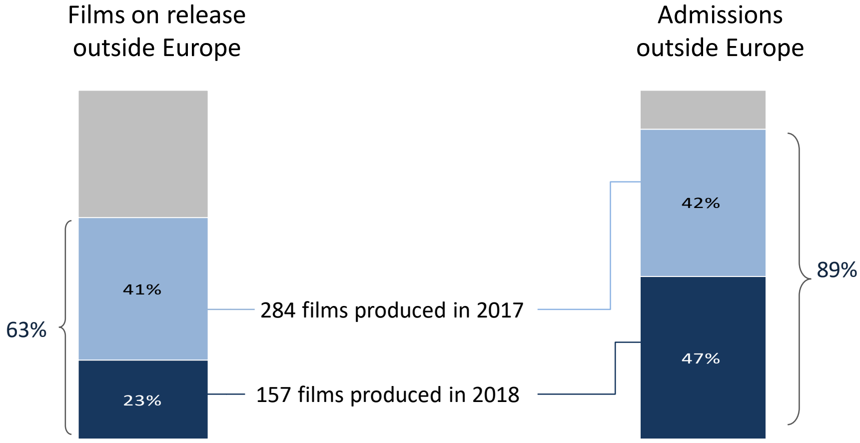
How diverse is the European film offering in terms of the age of films? Are only recent productions released outside Europe or is there demand for older productions?

As illustrated in Figure 16 and Table 29, recent productions, that is films produced in 2017 or 2018, accounted for 'only' 63% of the European films on release but for 89% of total admissions in 2018. While three- to five-year-old productions accounted for another 16% (114 films) of European films on release, they cumulatively captured only about 9% of total admissions. Another 82 (11%) European films on release outside Europe in 2018 were produced before or in 2013 and cumulatively accounted for only 1% of admissions.

These figures suggest that while the commercially relevant market is practically dominated by the export of recent productions, there appears to be a certain demand for a limited number of older European films, which do not, however, generate large numbers of admissions. The figures also show a certain time lag, with a significant number of European films released outside Europe one or two years after their production year.

Figure 21. Share of "recent" European films in non-European release markets (2018)

Estimated. As tracked in LUMIERE.



Source: European Audiovisual Observatory / LUMIERE, Comscore.

Table 29. Concentration of European films outside Europe by production year (2018)

Estimated. As tracked in LUMIERE.

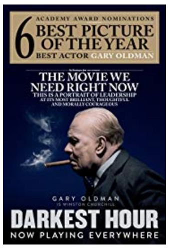
Production year	Films on release	*% share*	*Cumulative % share*	Admissions	*% share*	*Cumulative % share*
2018	157	23%	23%	40 503 332	47%	47%
2017	284	41%	63%	36 777 475	42%	89%
2016	114	16%	80%	7 458 765	9%	97%
2015	39	6%	85%	123 188	0%	98%
2014	20	3%	88%	1 133 525	1%	99%
[2001-2013]	31	4%	93%	0%	0%	99%
[1991-2000]	5	1%	94%	16 368	0%	99%
[1900-1990]	46	6%	100%	943 132	1%	100%
TOTAL	**696**	**100%**		**86 955 785**	**100%**	

Source: European Audiovisual Observatory / LUMIERE, Comscore.

4.5. Top 100 European films outside Europe

Table 30. Short profiles of top 5 European films outside Europe 2018

Admissions refer to admissions generated in 2018. "Int." stands for 15 non-European markets covered in this report.

1		***Johnny English* (2018)** Country of origin: GB / US / FR **Director:** David Kerr **European admissions:** 8.2 million **Int. admissions:** 9.6 million **Int. release markets**: 11 **Remark:** inter alia a Working Title production	**Genre:** Action, Comedy, Adventure **Language:** English **Plot:** A cyber-attack reveals the identity of all active undercover agents in Britain, leaving Johnny English as the Secret Service's last hope. Called out of retirement, English dives headfirst into action with the mission to find the mastermind hacker. As a man with few skills and analogue methods, Johnny English must overcome the challenges of modern technology to make this mission a success.
2		***The Commuter (2018)*** Country of origin: GB / US / FR **Director:** Jaume Collet-Serra **European admissions:** 4.2 million **Int. admissions:** 9.6 million **Int. release markets**: 12	**Genre:** Action, Mystery, Thriller **Language:** English **Plot:** An insurance salesman/ex-cop is caught up in a criminal conspiracy during his daily commute home.
3		***Paddington 2* (2017)** Country of origin: GB / FR **Director:** Paul King **European admissions:** 4.2 million **Int. admissions:** 6.9 million **Int. release markets**: 11	**Genre:** Family, Comedy, Adventure **Language:** English **Plot:** Paddington, now happily settled with the Brown family and a popular member of the local community, picks up a series of odd jobs to buy the perfect present for his Aunt Lucy's 100th birthday, only for the gift to be stolen.
4		***Darkest Hour* (2017)** Country of origin: GB / US **Directors:** Joe Wright **European admissions:** 7.0 million **Int. admissions:** 5.7 million **Int. release markets**: 12	**Genre:** Biography, Drama, History **Language:** English **Plot:** In May 1940, the fate of Western Europe hangs on British Prime Minister Winston Churchill, who must decide whether to negotiate with Adolf Hitler, or fight on knowing that it could mean a humiliating defeat for Britain and its empire.
5		***The Snow Queen 3 (2016)*** Country of origin: RU **Directors:** Aleksey Tsitsilin **European admissions:** 0.3 million **Int. admissions:** 2.3 million **Int. release markets**: 1 (CN)	**Genre:** Animation, Family, Adventure, Comedy **Language:** Russian **Plot:** The rare gift of getting into all kinds of trouble is their family trait. What else can you expect from the ones raised among trolls in snowy lands? But now Kai and Gerda have grown up and entered a new stage - this time they are going to cause a global disaster.

Source: European Audiovisual Observatory / LUMIERE, Comscore, IMDB

Table 31. Top 100 European films in terms of admissions (est.) generated outside Europe (2018)

N°	Film	Countries of origin	Prod. year	# of release markets	Adm. 2018 outside Europe	Adm. 2018 US/CA	Adm. 2018 Latin America	Adm. 2018 AU/NZ	Adm. 2018 Asia
1	Johnny English Strikes Again	GB / US / FR	2018	11	9 557 254	481 153	1 408 173	1 120 692	6 547 236
2	The Commuter	GB / US / FR	2018	12	9 538 855	3 963 344	3 149 888	290 495	2 135 128
3	Paddington 2	GB / FR	2017	11	6 880 055	4 459 279	971 392	472 569	976 815
4	Darkest Hour	GB / US	2017	12	5 738 502	3 754 886	849 836	738 035	395 745
5	Snezhnaya koroleva 3. Ogon i led	RU	2016	1	2 348 019	0	0	0	2 348 019
6	Call Me by Your Name	IT / FR / BR / US	2017	11	2 301 916	1 384 273	457 536	96 042	364 065
7	Early Man	GB / US	2018	10	2 207 643	901 586	855 553	182 077	268 427
8	The Favourite	GB / IE / US	2018	4	2 025 346	1 896 874	0	128 472	0
9	A Street Cat Named Bob	GB	2016	1	1 615 660	0	0	0	1 615 660
10	Perfetti sconosciuti	IT	2016	2	1 609 369	0	10 991	0	1 598 378
11	The Wife	GB / SE / US	2017	8	1 436 519	891 907	271 981	269 764	2 867
12	Three Identical Strangers	GB	2018	3	1 378 121	1 343 604	0	34 517	0
13	Mary Queen of Scots	GB / US	2018	2	1 229 882	1 229 882	0	0	0
14	The Death of Stalin	GB / FR / BE / CA	2017	7	1 161 222	874 098	31 363	209 950	45 811
15	Tadeo Jones 2: El secreto del Rey Midas	ES	2017	8	1 067 408	0	1 051 112	16 296	0
16	Taxi 5	FR	2018	3	1 031 949	3 227	1 163	0	1 027 559
17	Seven Sisters	GB/ US / FR / BE	2017	0	902 876	0	0	0	902 876
18	Der 7bte Zwerg	DE	2014	1	867 605	0	0	0	867 605
19	Luis & the Aliens	DE / LU / DK	2018	9	804 645	18 443	659 652	34 334	92 216
20	Finding Your Feet	GB	2017	7	795 685	154 709	47 825	583 615	9 536
21	Colette	GB / US / HU	2018	8	757 345	560 264	131 762	65 319	0
22	The Little Vampire 3D	NL / DE / DK / GB	2017	6	736 401	0	708 271	5 259	22 871
23	The Guernsey Literary and Potato Peel Pie Society	GB / FR / US	2018	2	710 585	0	0	708 065	2 520
24	They Shall Not Grow Old	GB / NZ	2018	4	706 780	622 010	0	83 320	1 450
25	The Leisure Seeker	IT / FR	2017	7	695 716	350 305	33 929	114 210	197 272
26	Le jeune Karl Marx	FR / BE / DE	2017	5	691 708	11 702	56 329	0	623 677
27	2001: A Space Odyssey	GB / US	1968	5	683 059	621 238	0	25 396	36 425
28	7 Days in Entebbe	GB / US	2018	8	677 830	362 801	268 242	0	46 787
29	Incident in a Ghostland	FR / CA	2018	6	664 320	0	636 579	0	27 741
30	Goodbye Christopher Robin	GB[Inc] / US	2017	3	630 495	0	128 341	5 410	496 744
31	Deep	ES / BE / CH / CN / …	2017	1	596 235	0	0	0	596 235
32	Mary Magdalene	GB	2018	8	588 763	0	495 118	54 013	39 632
33	Le grand méchant Renard et autres contes...	FR / BE	2017	2	537 835	3 422	0	0	534 413
34	Salyut-7	RU	2017	1	519 074	0	0	0	519 074
35	Lyod	RU	2018	1	518 615	0	0	0	518 615
36	Loving Pablo	ES / BG	2017	5	511 265	2 401	496 017	0	12 847
37	A Wizard's Tale	GB / MX / US	2018	2	505 962	238	503 253	0	2 471
38	The Bookshop	ES / GB / DE	2017	9	493 241	119 294	115 697	258 250	0
39	Ploey	IS / BE	2018	3	485 674	0	441 414	0	44 260
40	Blood Father	FR	2016	1	478 305	0	0	0	478 305
41	The Titan	GB / ES / US	2018	1	470 899	0	0	0	470 899
42	You Were Never Really Here	GB[Inc] / FR / US	2017	7	439 006	275 690	123 613	12 500	27 203
43	Whitney	GB / US	2018	5	387 545	330 028	15 866	20 590	21 061
44	The Healer	ES / US / CA	2017	2	385 489	0	385 489	0	0
45	Les as de la jungle	FR	2017	5	346 624	0	41 384	10 933	294 307
46	The Sisters Brothers	FR / ES / RO / US / …	2018	2	342 754	342 754	0	0	0
47	American Animals	GB / NL / US	2018	3	331 280	311 531	0	18 760	989
48	Tea with the Dames	GB	2018	4	310 634	94 328	10 211	206 095	0
49	Suspiria	IT / US	2018	4	286 709	270 826	0	15 883	0
50	Johnny English Strikes Again	GB / US / FR	2018	11	9 557 254	481 153	1 408 173	1 120 692	6 547 236

Source: European Audiovisual Observatory / LUMIERE, Comscore

Table 31 contd.

N°	Film	Countries of origin	Prod. year	# of release markets	Adm. 2018 outside Europe	Adm. 2018 US/CA	Adm. 2018 Latin America	Adm. 2018 AU/NZ	Adm. 2018 CN/KR
51	Madame	FR	2017	8	272 293	0	264 393	902	6 998
52	Loving Vincent	PL / GB / CH / NL	2017	11	271 164	44 112	108 835	29 862	88 355
53	Sgt. Stubby: An American Hero	IE / GB / FR / CA / US	2018	3	269 822	244 842	0	240	24 740
54	Vykradena pryntsesa: Ruslan i …	UA	2018	4	264 316	0	264 316	0	0
55	Fátima, el Último Misterio	ES	2017	5	241 719	0	241 719	0	0
56	The Ritual	GB	2017	3	237 656	0	237 656	0	0
57	Pope Francis: A Man of His Word	VA / IT / CH / DE /FR	2018	6	237 373	219 016	18 357	0	0
58	Ghost Stories	GB	2017	7	235 474	14 732	215 344	5 398	0
59	Two Tails	RU	2018	4	232 998	0	205 450	0	27 548
60	The Party	GB	2017	7	226 979	81 770	60 467	77 961	6 781
61	Don't Worry, He Won't Get Far on Foot	FR / US	2018	8	224 961	157 220	52 802	14 939	0
62	Maya the Bee: The Honey Games	DE / AU	2018	4	221 811	0	106 061	19 288	96 462
63	At Eternity's Gate	CH / IE / GB / FR /US	2018	3	211 907	207 921	0	3 986	0
64	No dormirás	ES / AR / UY	2018	3	210 921	0	210 921	0	0
65	Film Stars Don't Die in Liverpool	GB	2017	8	207 581	105 419	39 323	52 077	10 762
66	Everybody Knows	ES / FR / IT	2018	3	199 876	0	199 876	0	0
67	Slumber	GB / US	2017	2	193 006	0	193 006	0	0
68	Trener	RU	2018	1	192 168	0	0	0	192 168
69	Viking	RU	2016	2	185 800	0	185 800	0	0
70	Perfectos desconocidos	ES / IT	2017	2	185 425	0	185 425	0	0
71	Muse	ES / IE / BE / FR	2017	1	183 188	0	174 341	0	8 847
72	Ce qui nous lie	FR	2017	6	181 666	28 093	41 486	59 172	52 915
73	Un beau soleil intérieur	FR / BE	2017	5	181 509	94 695	82 361	0	4 453
74	L'empereur	FR	2017	3	180 481	0	4 823	0	175 658
75	Inside	ES / GB / US / FR	2016	3	176 687	0	150 799	0	25 888
76	D'après une histoire vraie	FR / BE / PL	2017	5	176 268	0	174 310	0	1 958
77	McQueen	GB	2018	4	172 791	137 107	0	28 054	7 630
78	Maria by Callas	FR	2017	4	171 390	123 141	14 915	0	33 334
79	47 Meters Down	GB / DO / US	2017	4	167 356	0	166 993	0	363
80	On Chesil Beach	GB	2017	5	164 918	81 349	0	45 951	37 618
81	The Killing of a Sacred Deer	IE / GB / US	2017	9	162 757	229	93 318	2 698	66 512
82	Coldplay: A Head Full of Dreams	GB	2018	9	160 056	63 621	62 720	25 698	8 017
83	Maya the Bee Movie	DE / AU	2014	1	155 229	0	0	0	155 229
84	Nelyubov	RU / FR / DE / BE	2017	5	153 795	59 251	60 308	32 471	1 765
85	Lean on Pete	GB	2017	6	152 888	126 832	17 530	4 503	4 023
86	Aus dem Nichts	DE / FR	2017	9	150 125	32 416	96 723	4 168	16 818
87	The Square	SE / DE / FR / DK	2017	8	148 714	27 296	50 678	32 086	38 654
88	Fiksiki: Bolshoy sekret	RU	2017	2	144 642	0	125 207	0	19 435
89	Bullet Head	BG / US	2017	2	143 121	0	143 121	0	0
90	Die kleine Hexe	DE / CH	2018	3	142 674	0	142 266	408	0
91	L'amant double	FR / BE	2017	9	130 801	18 229	93 905	1 720	16 947
92	The Children Act	GB / US	2017	4	130 268	31 304	0	92 336	6 628
93	Épouse-moi mon pote	FR	2017	2	121 774	0	121 652	0	122
94	Thomas & Friends: Journey Beyond Sodor	GB	2017	1	119 425	0	0	0	119 425
95	Revenge	FR	2017	6	118 779	11 134	101 268	0	6 377
96	El último traje	ES / AR	2017	5	117 985	6 905	85 480	2 013	23 587
97	Valerian and the City of a Thousand Planets	FR / CN / US / DE / AE	2017	2	116 320	0	183	0	116 137
98	The Mercy	GB	2018	8	114 063	1 126	71 198	39 171	2 568
99	1945	HU	2017	6	107 561	80 839	23 920	2 802	0
100	Yellow Submarine	GB	1968	2	107 293	107 293	0	0	0

Source: European Audiovisual Observatory / LUMIERE, Comscore

5. APPENDIX

5.1. Number of films tracked in LUMIERE

Table 32. Number of films tracked in LUMIERE database by territory (2014-2018)

Territory			2014	2015	2016	2017	2018
EUROPE							
1	**AT**	Austria	510	534	567	575	467
2	**BA**	Bosnia-Herzegovina		19	201	218	234
3	**BE**	Belgium	343	504	272	957	950
4	**BG**	Bulgaria	283	312	318	333	348
5	**CH**	Switzerland	1 671	1 643	1 642	1 834	1 900
6	**CY**	Cyprus	4	153	18	148	139
7	**CZ**	Czech Republic	1 228	1 076	1 179	1 252	1 221
8	**DE**	Germany	652	2 362	2 444	2 373	2 363
9	**DK**	Denmark	260	260	287	314	285
10	**EE**	Estonia	377	351	377	376	356
11	**ES**	Spain	1 463	1 473	1 740	1 663	1 901
12	**FI**	Finland	337	338	328	328	361
13	**FR**	France	933	935	958	984	831
14	**GB**	United Kingdom & Ireland	798	2 559	2 586	2 751	2 726
15	**GE**	Georgia				194	
16	**GR**	Greece	329	351	406	415	336
17	**HR**	Croatia	247	226	250	248	206
18	**HU**	Hungary	302	555	553	615	770
19	**IS**	Iceland	7	161	196	199	196
20	**IT**	Italy	1 110	1 196	1 261	1 400	1 620
21	**LT**	Lithuania	304	267	290	297	309
22	**LU**	Luxembourg	76	104	112	104	516
23	**LV**	Latvia	13	517	233	304	294
24	**ME**	Montenegro (from June 2006)	177	182	163	194	18
25	**MK**	North Macedonia		221	23	3	
26	**NL**	Netherlands	1 201	1 133	562	1 187	1 147
27	**NO**	Norway	483	496	595	586	660
28	**PL**	Poland	507	547	556	586	501
29	**PT**	Portugal	956	995	1 030	868	998
30	**RO**	Romania	411	416	412	448	389
31	**RU**	Russian Federation	497	622	658	747	759
32	**SE**	Sweden	574	537	881	868	13
33	**SI**	Slovenia	442	430	505	475	476
34	**SK**	Slovakia	566	609	607	735	717
35	**TR**	Turkey	498	564	522	526	531
OUTSIDE OF EUROPE							
1	**AR**	Argentina	366	499	525	539	553
2	**AU**	Australia	432	569	621	679	748
3	**BR**	Brazil	467	613	649	686	676
4	**CA**	Canada	601	484	531	494	485
5	**CL**	Chile	203	281	289	259	253
6	**CN**	China		422	648	890	940
7	**CO**	Colombia	241	343	385	432	385
8	**HK**	Hong Kong					
9	**JP**	Japan					
10	**KR**	South Korea	729	591	518	488	504
11	**MX**	Mexico	376	586	594	592	566
12	**NZ**	New Zealand	310	355	382	441	455
13	**SG**	Singapore					
14	**US**	United States of America	1 238	815	833	832	888
15	**VE**	Venezuela	166	199	269	255	182

Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.2. Admissions tracked in LUMIERE

Table 33. Admissions tracked in LUMIERE database by territory (2014-2018)

Territory			2013	2014	2015	2016	2017
EUROPE							
1	AT	Austria	14 350 653	15 989 960	15 169 166	14 674 486	12 935 587
2	BA	Bosnia-Herzegovina	33 782	946 834	919 911	1 083 287	1 128 431
3	BE	Belgium	18 644 951	17 442 651	19 787 158	19 486 076	18 169 047
4	BG	Bulgaria	4 908 266	5 334 622	5 532 916	5 574 014	4 900 408
5	CH	Switzerland	12 786 036	14 289 522	13 315 252	13 415 661	11 588 385
6	CY	Cyprus	699 398	29 008	700 537	744 593	753 517
7	CZ	Czech Republic	11 455 342	12 922 707	15 537 428	15 182 902	16 260 145
8	DE	Germany	120 351 597	135 061 388	122 198 044	118 588 167	104 715 548
9	DK	Denmark	12 194 185	14 225 882	13 502 884	12 607 857	13 002 004
10	EE	Estonia	2 606 577	3 087 502	3 289 972	3 516 411	3 631 221
11	ES	Spain	87 585 014	96 125 872	101 815 199	108 338 863	98 308 853
12	FI	Finland	7 312 341	8 723 606	8 681 351	8 829 484	8 098 848
13	FR	France	191 387 285	189 695 423	189 321 536	189 737 551	175 254 192
14	GB	United Kingdom & Ireland	168 061 645	182 456 096	180 360 038	184 036 017	177 005 489
15	GE	Georgia			1 139 664		
16	GR	Greece	9 107 058	9 973 173	10 220 251	10 257 491	9 373 992
17	HR	Croatia	3 793 511	3 949 173	4 328 497	4 577 453	4 607 068
18	HU	Hungary	11 016 105	13 018 248	14 643 931	15 055 171	15 447 038
19	IS	Iceland	1 344 560	1 378 555	1 420 503	1 373 179	1 428 054
20	IT	Italy	92 010 500	99 860 129	105 913 593	92 749 209	85 918 276
21	LT	Lithuania	3 240 702	3 330 451	3 670 957	4 064 473	4 272 062
22	LU	Luxembourg	514 175	132 815	107 566	1 153 945	1 055 202
23	LV	Latvia	2 303 718	2 286 742	2 514 215	2 474 160	2 523 600
24	ME	Montenegro (from June 2006)	258 894	241 620	244 018	108 083	277 113
25	MK	North Macedonia	357 324	9 355	3 020	421 207	401 331
26	NL	Netherlands	30 671 280	30 323 060	33 545 454	37 181 426	36 789 840
27	NO	Norway	10 890 188	11 892 931	12 950 684	11 561 157	12 065 755
28	PL	Poland	40 386 379	44 546 300	52 041 397	56 486 768	59 583 210
29	PT	Portugal	12 085 913	14 542 013	14 888 389	15 620 593	14 735 324
30	RO	Romania	10 131 494	11 131 959	13 003 487	14 430 220	13 282 908
31	RU	Russian Federation	191 528 189	191 231 273	213 433 489	213 074 895	200 258 708
32	SE	Sweden	16 246 619	17 015 707	17 719 737	7 029 048	5 861 002
33	SI	Slovenia	1 847 744	1 978 525	2 292 579	2 288 471	2 503 242
34	SK	Slovakia	4 119 361	4 607 152	5 664 778	6 690 176	5 952 314
35	TR	Turkey	61 353 895	60 355 895	58 293 932	71 177 830	70 355 314
OUTSIDE OF EUROPE							
1	AR	Argentina	43 797 344	50 051 809	47 742 990	46 906 918	43 797 418
2	AU	Australia	77 117 515	87 971 495	84 377 285	77 533 994	85 985 272
3	BR	Brazil	154 745 338	168 328 693	179 418 398	176 679 905	160 687 272
4	CA	Canada	116 206 322	118 391 032	115 959 416	108 685 530	109 411 190
5	CL	Chile	21 940 101	25 898 969	27 052 997	26 695 139	27 791 754
6	CN	China	794 733 977	1 214 104 427	1 313 959 564	1 512 093 103	1 678 438 778
7	CO	Colombia	45 986 154	58 667 015	59 668 996	60 842 109	63 721 324
8	HK	Hong Kong				22 597 173	23 793 464
9	JP	Japan				159 212 151	158 383 196
10	KR	South Korea	210 927 515	214 338 372	206 494 879	210 136 229	212 524 513
11	MX	Mexico	256 255 435	294 365 188	328 246 682	339 135 476	332 488 257
12	NZ	New Zealand	10 939 122	13 890 356	15 059 018	14 697 675	16 469 801
13	SG	Singapore				18 889 090	18 360 086
14	US	United States of America	1 154 434 215	1 197 322 384	1 195 094 846	1 099 859 580	1 185 138 507
15	VE	Venezuela	29 592 206	28 918 555	18 784 388	20 340 564	9 965 226

Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.3. Estimated LUMIERE coverage rates

Table 34. Estimated LUMIERE coverage rate of individual territories (2014-2018)

Territory			2014	2015	2016	2017	2018
EUROPE							
1	**AT**	Austria	100%	100%	100%	100%	100%
2	**BA**	Bosnia-Herzegovina	4%	100%	100%	100%	97%
3	**BE**	Belgium	87%	82%	100%	100%	97%
4	**BG**	Bulgaria	100%	100%	100%	100%	100%
5	**CH**	Switzerland	99%	99%	99%	99%	99%
6	**CY**	Cyprus	100%	4%	100%	100%	100%
7	**CZ**	Czech Republic	99%	100%	99%	100%	99%
8	**DE**	Germany	99%	97%	100%	100%	99%
9	**DK**	Denmark	100%	100%	100%	100%	100%
10	**EE**	Estonia	100%	100%	100%	100%	100%
11	**ES**	Spain	100%	100%	100%	100%	99%
12	**FI**	Finland	100%	100%	100%	100%	100%
13	**FR**	France	92%	92%	89%	91%	87%
14	**GB**	United Kingdom & Ireland	100%	100%	100%	100%	100%
15	**GE**	Georgia	0%	0%	99%	0%	0%
16	**GR**	Greece	100%	100%	100%	100%	100%
17	**HR**	Croatia	100%	100%	100%	100%	100%
18	**HU**	Hungary	100%	100%	100%	100%	100%
19	**IS**	Iceland	97%	100%	100%	100%	99%
20	**IT**	Italy	94%	94%	93%	93%	94%
21	**LT**	Lithuania	100%	100%	100%	100%	100%
22	**LU**	Luxembourg	46%	11%	10%	98%	100%
23	**LV**	Latvia	100%	97%	100%	100%	100%
24	**ME**	Montenegro (from June 2006)	100%	92%	78%	37%	99%
25	**MK**	North Macedonia	100%	2%	1%	100%	100%
26	**NL**	Netherlands	100%	92%	98%	100%	100%
27	**NO**	Norway	98%	99%	99%	98%	100%
28	**PL**	Poland	100%	100%	100%	100%	100%
29	**PT**	Portugal	100%	100%	100%	100%	100%
30	**RO**	Romania	100%	100%	100%	100%	100%
31	**RU**	Russian Federation	100%	100%	100%	100%	100%
32	**SE**	Sweden	100%	100%	100%	42%	36%
33	**SI**	Slovenia	96%	94%	98%	97%	98%
34	**SK**	Slovakia	100%	100%	100%	100%	100%
35	**TR**	Turkey	100%	99%	100%	100%	100%
OUTSIDE OF EUROPE							
1	**AR**	Argentina	96%	96%	94%	95%	94%
2	**AU**	Australia	98%	98%	92%	91%	96%
3	**BR**	Brazil	99%	97%	97%	97%	100%
4	**CA**	Canada	100%	100%	100%	100%	100%
5	**CL**	Chile	100%	100%	99%	97%	100%
6	**CN**	China	96%	96%	96%	93%	98%
7	**CO**	Colombia	98%	99%	97%	97%	100%
8	**HK**	Hong Kong	-	-	-	93%	95%
9	**JP**	Japan	-	-	-	91%	94%
10	**KR**	South Korea	98%	99%	95%	96%	98%
11	**MX**	Mexico	100%	100%	100%	100%	100%
12	**NZ**	New Zealand	73%	90%	94%	93%	99%
13	**SG**	Singapore	-	-	-	97%	94%
14	**US**	United States of America	95%	103%	96%	90%	100%
15	**VE**	Venezuela	98%	97%	98%	89%	63%

Source: European Audiovisual Observatory / LUMIERE, Comscore.

5.4. Treatment of EUR inc films

As mentioned in the methodological remarks in Chapter 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 Education, Audiovisual and Culture Executive Agency (EAC) film database (https://eacea.ec.europa.eu/mediaPgm/tabsMenu.do) and / or in Europa Cinema's film database (https://www.europa-cinemas.org/en/search-film). Please note that the Observatory's "inc" classification is not based on the same criteria as the British Film Institute's classification of *inward investment* films in the UK. The Observatory's "inc" classification is more restrictive and counts fewer films as "GB" or "GB inc" films than the BFI counts "UK films".

Table 35. EUR inc films considered European films in this report (2014-2018)

Rank	Original title	Prod. country	Prod. year	Director(s)	Adm. outside Europe 12/15 markets 2014-2018
1	The Theory of Everything	GB[Inc] / US	2014	James Marsh	6 909 067
2	The Woman in Black 2: Angel of Death	GB[Inc] / US / CA	2014	Tom Harper	5 519 422
3	Eddie the Eagle	GB[Inc] / US / DE	2016	Dexter Fletcher	3 263 533
4	The Quiet Ones	GB[Inc] / US	2014	John Pogue	1 808 177
5	Absolutely Fabulous: The Movie	GB[Inc] / US	2016	Mandie Fletcher	1 253 617
6	Bastille Day	GB[Inc] / FR / US	2016	James Watkins	1 213 287
7	Redemption	GB[Inc] / US	2013	Steven Knight	1 035 770
8	The Snowman	GB[Inc] / US / SE	2017	Tomas Alfredson	1 010 707
9	Goodbye Christopher Robin	GB[Inc] / US	2017	Simon Curtis	995 204
10	Genius	GB[Inc] / US	2016	Michael Grandage	725 794
11	Rush	GB[Inc] / US / DE	2013	Ron Howard	659 955
12	Denial	GB[Inc] / US	2016	Mick Jackson	610 704
13	My Cousin Rachel	GB[Inc] / US	2017	Roger Michell	501 845
14	You Were Never Really Here	GB[Inc] / FR / US	2017	Lynne Ramsay	439 006
15	Under the Skin	GB[Inc] / US / CH	2013	Jonathan Glazer	349 101
16	Tulip Fever	GB[Inc] / US	2017	Justin Chadwick	347 703
17	A Quiet Passion	GB[Inc] / BE / US	2016	Terence Davies	313 279
18	Absolutely Anything	GB[Inc] / US	2015	Terry Jones	308 057
19	Unlocked	GB[Inc] / US / CZ / CH	2017	Michael Apted	178 497
20	Locke	GB[Inc] / US	2013	Steven Knight	177 761
21	Dancer	GB[Inc] / US	2016	Steven Cantor	120 825
22	Final Portrait	GB[Inc] / US	2017	Stanley Tucci	114 024
23	Tommy's Honour	GB[Inc] / US	2016	Jason Connery	76 744
24	David Brent: Life on the Road	GB[Inc] / US	2016	Ricky Gervais	75 098
25	The Journey	GB[Inc] / US	2016	Nick Hamm	61 181
26	Seven Psychopaths	GB[Inc] / US	2012	Martin McDonagh	2 874
27	Hyde Park on Hudson	GB[Inc] / US	2012	Roger Michell	2 482
28	Take Down	GB[Inc] / US	2016	Jim Gillespie	636

Source: European Audiovisual Observatory / LUMIERE, Comscore

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

Table 36. EUR inc films considered US films in this report (2014-2018)

Rank	Original title	Prod. country	Prod. year	Director(s)	Adm. outside Europe 12/15 markets 2014-2018
1	Fantastic Beasts and Where to Find Them	GB[Inc] / US	2016	David Yates	63 545 209
2	Bohemian Rhapsody	GB[Inc] / US	2018	Bryan Singer	53 762 385
3	Spectre	GB[Inc] / US	2015	Sam Mendes	52 903 194
4	Fantastic Beasts: The Crimes of Grindelwald	GB[Inc] / US	2018	David Yates	47 743 136
5	Dunkirk	GB[Inc] / US / FR / NL	2017	Christopher Nolan	41 723 012
6	Kingsman: The Secret Service	GB[Inc] / US	2014	Matthew Vaughn	39 789 045
7	Kingsman: The Golden Circle	GB[Inc] / US	2017	Matthew Vaughn	36 648 417
8	Baby Driver	GB[Inc] / US	2017	Edgar Wright	20 475 596
9	The Foreigner	GB[Inc] / US / CN	2017	Martin Campbell	18 452 807
10	Three Billboards Outside Ebbing, Missouri	GB[Inc] / US	2017	Martin McDonagh	10 076 205
11	The Second Best Exotic Marigold Hotel	GB[Inc] / US	2015	John Madden	5 621 368
12	Woman in Gold	GB[Inc] / US	2015	Simon Curtis	5 133 371
13	Ex Machina	GB[Inc] / US	2015	Alex Garland	3 154 541
14	Mr. Holmes	GB[Inc] / US	2015	Bill Condon	2 323 853
15	The Infiltrator	GB[Inc] / US	2016	Brad Furman	2 089 916
16	Far from the Madding Crowd	GB[Inc] / US	2015	Thomas Vinterberg	1 775 670
17	The Autopsy of Jane Doe	GB[Inc] / US	2016	André Øvredal	1 244 243
18	Grimsby	GB[Inc] / US	2016	Louis Leterrier	1 111 266
19	Before I Go to Sleep	GB[Inc] / US / FR / SE	2014	Rowan Joffe	814 574
20	Legend	GB[Inc] / US / FR	2015	Brian Helgeland	703 516
21	Robin Hood	GB[Inc] / US	2010	Ridley Scott	344 602
22	One Chance	GB[Inc] / US	2013	David Frankel	281 069
23	We Are X	GB[Inc] / US	2016	Stephen Kijak	230 067
24	Black Sea	GB[Inc] / US / RU	2014	Kevin Macdonald	220 308
25	Harry Potter and the Philosopher's Stone	GB[Inc] / US	2001	Chris Columbus	164 166
26	The Exception	GB[Inc] / US / DE / BE	2016	David Leveaux	82 476
27	Una	GB[Inc] / US / CA	2016	Benedict Andrews	35 132
28	Harry Potter and the Chamber of Secrets	GB[Inc] / US	2002	Chris Columbus	30 727
29	Harry Potter and the Prisoner of Azkaban	GB[Inc] / US	2004	Alfonso Cuarón	27 813
30	Harry Potter and the Deathly Hallows: Part 2	GB[Inc] / US	2011	David Yates	25 622
31	Harry Potter and the Goblet of Fire	GB[Inc] / US	2005	Mike Newell	24 627
32	Harry Potter and the Order of the Phoenix	GB[Inc] / US	2007	David Yates	21 856
33	Harry Potter and the Half-Blood Prince	GB[Inc] / US	2008	David Yates	21 409
34	Harry Potter and the Deathly Hallows: Part 1	GB[Inc] / US	2010	David Yates	21 400
35	I Am Ali	GB[Inc] / US	2014	Clare Lewins	887
36	Arthur Christmas	GB[Inc] / US	2011	Sarah Smith, Barry Co	197
37	Valiant	GB[Inc] / US	2005	Gary Chapman	87
38	Gnomeo and Juliet	GB[Inc] / US	2011	Kelly Asbury	61
39	Trance	GB[Inc] / US / FR	2013	Danny Boyle	41
40	Skyfall	GB[Inc] / US	2012	Sam Mendes	30
41	The Debt	GB[Inc] / US / HU	2010	John Madden	26
42	The Best Exotic Marigold Hotel	GB[Inc] / US / UA	2011	John Madden	8

Source: European Audiovisual Observatory / LUMIERE, Comscore

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